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# Table of Contents

## Chapter 1
### Introduction

Overview ................................................................. 8
Main Menu ............................................................... 9
Program Concept .................................................. 13
Initial Setup .......................................................... 14
System Tools .......................................................... 17
  Navigational Tool Bar .......................................... 17
  Search .................................................................. 19
  Query Builder ...................................................... 22

## Chapter 2
### Logging Into the System

Overview ............................................................... 32

## Chapter 3
### File Menu

Overview ............................................................... 35
Work Orders ........................................................... 38
  Lines Tab ........................................................ 44
  Function Buttons ............................................. 45
    Add Container .............................................. 53
    Rapid Container Add .................................. 21
    Add File .................................................. 26
    Standard Index Item Add .......................... 59
    Rapid Indexed Item Add ......................... 68
    Retrieve Container .................................. 74
    Open Shelf Management .......................... 80
    Retrieve File .......................................... 84
    Retrieve Non-Indexed File ........................ 88
    Re-file Container ....................................... 93
    Re-file File .......................................... 98
    Remove Container ................................... 103
    Remove File ....................................... 108
    Other Operations ...................................... 112
    Relocate ............................................... 116
    The Fungible Module ................................. 120
    Utility Buttons ......................................... 124
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit Line #</td>
<td>124</td>
</tr>
<tr>
<td>Labels</td>
<td>124</td>
</tr>
<tr>
<td>Edit/Delete Work Order Line</td>
<td>127</td>
</tr>
<tr>
<td>Verify</td>
<td>127</td>
</tr>
<tr>
<td>Double Key</td>
<td>131</td>
</tr>
<tr>
<td>Close Work Order</td>
<td>133</td>
</tr>
<tr>
<td>Audit Report</td>
<td>134</td>
</tr>
<tr>
<td>Export Work Order</td>
<td>134</td>
</tr>
<tr>
<td>General Tab</td>
<td>135</td>
</tr>
<tr>
<td>Web Server Functions</td>
<td>141</td>
</tr>
<tr>
<td>Scheduled Recurring Work Orders</td>
<td>143</td>
</tr>
<tr>
<td>View List of Recurring Work Orders</td>
<td>153</td>
</tr>
<tr>
<td>Convert Recurring Work Orders to Active Work Orders</td>
<td>154</td>
</tr>
<tr>
<td>Export Work Order to Another Version of Total Recall</td>
<td>155</td>
</tr>
<tr>
<td>Transfer a Retrieved Item to Another Individual</td>
<td>156</td>
</tr>
<tr>
<td>Log Off, Show Tool Bar, Exit</td>
<td>157</td>
</tr>
<tr>
<td>Chapter 4</td>
<td></td>
</tr>
<tr>
<td>Scanning</td>
<td></td>
</tr>
<tr>
<td>Overview</td>
<td>158</td>
</tr>
<tr>
<td>Installing the Apex II Scanner and the Apex Manager Software</td>
<td>158</td>
</tr>
<tr>
<td>Downloading the Apex II Scanner</td>
<td>159</td>
</tr>
<tr>
<td>Scanning with the Apex II Scanner</td>
<td>163</td>
</tr>
<tr>
<td>F1 Scan To WO</td>
<td>164</td>
</tr>
<tr>
<td>Add Container</td>
<td>164</td>
</tr>
<tr>
<td>Refile Container or Indexed Item</td>
<td>168</td>
</tr>
<tr>
<td>Relocating a Container or Indexed Item</td>
<td>170</td>
</tr>
<tr>
<td>Permanently Remove a Container</td>
<td>172</td>
</tr>
<tr>
<td>Retrieving Files from the Apex II Scanner</td>
<td>173</td>
</tr>
<tr>
<td>Importing Data File into Total Recall</td>
<td>174</td>
</tr>
<tr>
<td>F2 Container</td>
<td>178</td>
</tr>
<tr>
<td>Retrieving Files From the Apex II Scanner- F2 Container</td>
<td>179</td>
</tr>
<tr>
<td>Importing Data File into Total Recall - F2 Container</td>
<td>180</td>
</tr>
<tr>
<td>F3 File to Box</td>
<td>184</td>
</tr>
<tr>
<td>Retrieving Files From the Apex II Scanner – F3 – File to Box</td>
<td>185</td>
</tr>
<tr>
<td>Importing Data File Into Total Recall – F3 File to Box</td>
<td>186</td>
</tr>
<tr>
<td>Common Scan Errors and Warnings</td>
<td>189</td>
</tr>
<tr>
<td>Send Picklist To The Apex II Scanner</td>
<td>191</td>
</tr>
<tr>
<td>Verify Retrievals</td>
<td>196</td>
</tr>
<tr>
<td>Permanently Relocate An Item To A Container</td>
<td>199</td>
</tr>
<tr>
<td>Retrieving Files From Apex II Scanner – Move Files</td>
<td>201</td>
</tr>
<tr>
<td>Importing Data File Into Total Recall - Move Files</td>
<td>203</td>
</tr>
<tr>
<td>Verify Put Aways</td>
<td>205</td>
</tr>
<tr>
<td>Apex II Scanner Functions</td>
<td>206</td>
</tr>
</tbody>
</table>
Chapter 5
Maintenance Menu

Overview..............................................................................................................208
Customers ............................................................................................................212
  General Tab....................................................................................................214
  Billing Options Tab.....................................................................................218
  Custom Captions Tab.....................................................................................226
  Customer Service Codes ..............................................................................233
  Customer Departments..................................................................................237
  Customer Security........................................................................................240
  Customer Delivery Sites ...........................................................................244
  Customer (Item) Types ..................................................................................247
  Master Service Codes ...................................................................................248
  Add, Edit & Delete a Service Code ...............................................................252
  Customer Service Codes ..............................................................................254
  Price Breaks ..................................................................................................255
  Customer Update Utility ..............................................................................256
  Containers ............................................................................................................257
  Auto Edit/Quick Search................................................................................260
  Add, Edit & Delete A Container....................................................................260
  Indexed Items in Container ...........................................................................262
    Edit Item in Container................................................................................262
  Indexed Items Stored In Containers ...............................................................263
    Add, Edit & Delete Indexed Item..................................................................266
  System Item ID Maintenance.........................................................................267
  Category Codes....................................................................................................269
  Customer Departments ..................................................................................271
  Department Statistics ........................................................................................273
  Facility Layout.....................................................................................................275
  Add, Edit & Delete Locations.........................................................................277
  Record Series .......................................................................................................278
  Add, Edit, & Delete A Record Series ............................................................279
  Customer Labels..................................................................................................281
  Add, Edit & Delete Label Range ...................................................................283
  Print Labels.........................................................................................................284
  Item Types .........................................................................................................285
  Add, Edit & Delete an Item Type ..................................................................286
  Route Maintenance ........................................................................................287
  Add, Edit & Delete Routes ............................................................................288
  Work Order Description Maintenance............................................................289
  Add, Edit, & Delete Work Order Description ...............................................290
  Priority Delivery Code Setup.........................................................................291
Chapter 6
Inquiry Menu
Overview ..............................................................................................................292
Customers ............................................................................................................296
Containers ............................................................................................................299
   View List of Containers ................................................................................299
   Container Maintenance .................................................................................300
   Container History .........................................................................................302
   Rapid Data Maintenance ...............................................................................303
   Query by Example (QBE) .............................................................................303
Items In Containers .............................................................................................304
View Containers and Indexed Items Simultaneously ..........................................305
Permanent Removals ..........................................................................................307
Departments By Customer ..................................................................................309
Relocations By New Location .............................................................................310
Facility Layout ..................................................................................................311
Available Locations ............................................................................................312
Work Orders ........................................................................................................313
Work Order History Inquiry ................................................................................314
   Detail .............................................................................................................314
   Query By Example (QBE) ............................................................................315
Record Series .......................................................................................................317
History of Barcode Scan Errors ...........................................................................318
   View/Recover Barcode Backup Files ...........................................................318

Chapter 7
Reports Menu
Overview ..............................................................................................................320
Printing Options ...................................................................................................321
   Toolbar .......................................................................................................322
   File (ASCII) ...............................................................................................323
Management Reports ...........................................................................................324
Customer Reports .............................................................................................326
   Container Reports .........................................................................................326
   Indexed Item Reports ...................................................................................328
Customer Department Reports .............................................................................329
Work Order Reports ............................................................................................330
Operation Reports ...............................................................................................331
Accounting Reports ..............................................................................................332
Month End Reports ............................................................................................333
Chapter 8
Accounting Menu

Overview..............................................................................................................334
Monthly End Close ............................................................................................336
Edit/Create Invoices..........................................................................................340
   Searching Invoice(s)......................................................................................340
   Creating Invoice(s).......................................................................................342
   Edit Invoices..................................................................................................344
   Comments ......................................................................................................346
   Work Order Detail .........................................................................................347
Input Payment .....................................................................................................348
   Post by Invoice..............................................................................................348
   Post Payment .................................................................................................350
   Edit Payment..................................................................................................351
   Bad Check ......................................................................................................352
   Write Off ........................................................................................................352
   Restore ...........................................................................................................352
   Post by Customer ..........................................................................................352
Print Invoices ......................................................................................................354
Accounting Reports ............................................................................................355
Export Invoices ..................................................................................................356
Sales Taxes...........................................................................................................357
   Sales Tax Authorities ....................................................................................357
   Sales Tax Codes ............................................................................................358
Month to Date Sales ..........................................................................................359
Calculate Late Fees ............................................................................................360

Chapter 9
Utility Menu

Overview..............................................................................................................363
Database Administration ......................................................................................365
   Validate the Database ..................................................................................365
   Open in Exclusive Mode...............................................................................365
   Open in Multi-User Mode..............................................................................365
   Compress the Database Container .............................................................366
Database Compacting ..........................................................................................366
Database Indexing ...............................................................................................368
End of Year Processing .........................................................................................369
Rebuild Available Locations .............................................................................370
Customer ID Conversion ......................................................................................373
Department ID by Customer Conversion ..........................................................375
   Convert Department ....................................................................................375
Shelf Labels..........................................................................................................376
Export Customer Information .............................................................................377
Chapter 10
System Menu

Overview..............................................................................................................402
Parameters............................................................................................................403
   Company/Billing............................................................................................403
   Minimum Transportation Settings .................................................................405
   Invoice System Parameters............................................................................408
   Work Order/Space Allocation........................................................................410
   Work Order Parameters.................................................................................412
   Bar Code/Field Lengths.................................................................................416
   Bar Code Settings ..........................................................................................416
   Valid Lengths.................................................................................................418
   Web Options ..................................................................................................419
   GL # Setup ....................................................................................................419
   T.R. Setup ......................................................................................................419
   General System .............................................................................................420
Default Captions ...................................................................................................422
Security................................................................................................................423
   User ID ........................................................................................................423
   User Maintenance ..........................................................................................423
   Add a User ....................................................................................................424
   Access Level Assignment ..............................................................................424
   Edit User/Delete User ....................................................................................427
Report Defaults ...................................................................................................428
Users Logged On ................................................................................................429
Data Path .............................................................................................................430
Language Management .......................................................................................430
## Chapter 11
### Additional Menus

<table>
<thead>
<tr>
<th>Overview</th>
<th>431</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remote</td>
<td>431</td>
</tr>
<tr>
<td>Edit</td>
<td>431</td>
</tr>
<tr>
<td>Help</td>
<td>432</td>
</tr>
<tr>
<td>Search</td>
<td>432</td>
</tr>
</tbody>
</table>
CHAPTER ONE
Introduction
CHAPTER 1

Introduction

Overview

Total Recall is a Windows™-based database system. The program is designed to manage all aspects of the Records Management Storage business. It features an intuitive windows interface and is designed for easy use. Many characteristics of Windows™ programs are available for the user, such as moving the uppermost screen to a new position so the screen directly beneath the displayed screen can be viewed. ‘Walk-A-Long’ fields are located throughout the program. When accessing a field that has this feature, as the user types, the field automatically fills in the closest match to what has been entered. When the choice is displayed in the field, the user clicks the [ENTER] key and the selection appears in the field. Cut, Copy and Paste features are available on all Maintenance and Input screens. From the ‘Browse’ screens, the user can resize the columns, and change the order in which the columns appear on the screen. These changes are then Saved per each User ID.

The purpose of this manual is to help the user understand how the program works, and to serve as a reference guide for the Screens, Reports and Utility functions found in the program.

Total Recall features a comprehensive Security Module that allows the System Administrator to control access to all Menu Options by assigning ‘Access Levels’ to each user. These access levels may include ‘Add/Edit’, ‘Read Only’, ‘Print’ or ‘No access’ to the menu option. Each user must log into the program by entering a user ID and a Password.

Total Recall operates from a pull down menu system. The Main menu is positioned across the Header bar at the top of the screen. When the user selects an option from the Main Menu, a Sub Menu displays directly beneath.
Main Menu

Below, the Total Recall Main Menu is displayed. The Main Menu options include: File, Maintenance, Inquiry, Reports, Accounting, Utility, System, Remote, Edit, Help and Search. The Edit Menu allows for the Undo, Redo, Cut, Copy, Paste, Clear and Select All features.

Fig. 1.1

Below and on the following pages is a Summary of the Main Menu options. Later Chapters in this Manual will outline each of the Main Menu options in more detail.

File
The File Menu option is used to Create New Work Orders and Edit existing Work Orders. Portable Bar Code options that include Importing Work Order Data, Sending and Retrieving a Picklist from the Apex Scanner, and Verifying Inventory are all accessed through the third option of the File Menu. For Web Server users, the File Menu allows for Web Work Orders to be imported into Total Recall. The File Menu also includes options to schedule daily Recurring Work Orders, Export a Work Order to another version of Total Recall and Transferring a Retrieved Item to another individual.
**Maintenance**

The Maintenance Menu allows the user to enter a new Customer and update existing Customers. From the Customer Maintenance screens, users can set billing parameters, set up transportation options, customize reference fields, customize pricing, add departments, enter security authorizations, and add additional site delivery addresses.

In addition to the Customer Maintenance, the Maintenance Menu allows the user to establish the Master Service Codes, customize Customer Service Codes, modify existing Container and Indexed Item Inventory and pre-print labels to send to a Customer. Maintenance can also be completed on the Indexed Item ID’s for Fixed Allocation, Category Codes, Customer Departments, Routes, Work Order Descriptions and Priorities.

Department Statistics can be viewed from the Maintenance Menu. The Facility Layout, which is necessary for Fixed Allocation to create all available locations, and available in Dynamic Allocation to assist in verifying the facility inventory and space availability, is accessed from the Maintenance Menu. Record Series and Item Types are created and modified through the Maintenance Menu.

**Inquiry**

The Inquiry Menu provides ‘Browse’ screens that enable the user to quickly locate information. The Inquiry Menu allows for inquiries on Customers; Containers; Items in Containers; Permanently Removed Containers and Permanently Removed Indexed Items; Departments by Customer; Relocations by New Location; Facility Layout; Available Locations (for Fixed Allocation); Work Orders; Work Order History (both Summary and Detail); Record Series; and a History of Barcode scan errors.

The ‘Browse’ screens provide both a ‘Boolean’ or a filtered search and a Quick Search. The Boolean search displays only the records that match exactly the criteria entered. This search is not recommended for centers with more than 50,000 records because of the length of time the search requires. An alternative to the ‘Boolean’ search is the Query Builder, located throughout Total Recall™, which allows the user to enter search criteria, view the results and export the results to many different file formats or to work order lines. The ‘Quick’ search buttons on the Container and Indexed Item Inquiry screens, re-orders the data within the table and locates the item(s) that match or most closely match the criteria entered. Container, Item Histories, Rapid Data Entry screens and Query By Example (QBE) screens are available under the Inquiry – Containers and Items in Containers options.
**Reports**  The Report Menu provides a wide range of Reports. These include Management Reports; Customer Reports, both Container and Indexed Items; Work Order Reports; Department Reports; Operational Reports; and Accounting Reports. These reports allow the user to preview on the computer screen, print to a printer or send to a file. The last option on the Reports Menu - Month End Reports, allows the user to set up specific reports to print at Month End. Using this feature the user can specify all reports, which should be printed at the end of each month for each customer. At the end of the month, after month end has processed, the user can click a button and return a few hours later or the next day and all the reports would be waiting for them, provided that the printer does not run out of paper or jam.

**Accounting**  The Accounting Menu option is used to access the accounting functions in Total Recall. The Month End Close feature creates the Invoices from closed Work Orders and then moves these work orders to a history file that can be accessed from the Inquiry Menu or the Report Menu. The user has the ability to then Edit any existing invoice or create a new invoice. All invoices can be printed as a group under a menu option or printed individually from the Invoice screen. The Accounting Menu allows the user to apply payments against invoices and print any Accounting Reports. Total Recall currently exports invoices to many commercial Accounting Packages. Sales Tax Authorities and Sales Tax Codes that are to be set up for most accounting exports can be set up under the Accounting Menu. The Month-to-Date Sales option allows the user to calculate the months activities through the current days date and generates a report that can then be printed by Customer or by Service Code. The Late Fees calculator can also be found under this menu option.

**Utility**  The Utility Menu allows the user to maintain the integrity of the database tables by offering the ability to validate the database, and re-index or compact individual or multiple database tables. The Utility Menu also allows for End-of-Year processing, which clears all the Statistical data from the previous year; Customer and Department ID conversions; and the ability to Rebuild Available locations (for Fixed Storage only). Container and File Labels can be generically pre-printed, or re-printed by the Total Recall Container or File number. Shelf Labels can also be printed from this menu. The user can Convert a fixed length ASCII file to a Work Order and Convert Containers into Indexed Items within a Container. This Menu option also allows the user to run an independent Media Verification against an imported database file and verify Indexed Item locations. The second portion of the Utility Menu allows the user the ability to Create, Modify and Run Customized Labels or Reports.
**System**  The System Menu includes the Parameters Submenu which contains vital information for Total Recall such as your Company Name, Address, the Current System Month, the ‘next’ number to be assigned to an Invoice, and new Containers or Indexed Items entered into the system. The Parameters Menu also allows for the System Administrator to set Work Order parameters, Bar Code options, the Warehouse Layout, default field lengths and customized captions for the Description fields and all Reference fields. The System Menu also has a Security Submenu, this option allows the System Administrator to enter and define user Access Levels for each person who will be using Total Recall. The Report Defaults Submenu allows for Report Defaults to be set for each report within the program. Users Logged On allows a currently logged on user to view all users logged into Total Recall at the current time. The Data Path option allows for a user to verify the path in which the current version of Total Recall is located.

**Remote**  Total Recall Remote Access is an ‘Add-On’ module that compliments the functionality of Total Recall. This module allows your Customer to view their Inventory, Print Reports and Create Work Orders on a condensed version of Total Recall that is installed at the Customer Location. This Menu option allows the user to create the Remote Access client inventories, and copy them to diskette or to a file on your hard drive for the user to dial-in to and retrieve. This menu option also allows for Importing Remote Access files sent back from the Customer to the Record Center.

**Edit**  The Edit Menu functions much like an edit menu of many Windows®-based products. This option allows for Cut, Copy and Paste features and Undo and Select All features. These features can also be accessed with the standard keyboard keys used in most Windows®-based products.

**Help**  The Help Menu option provides on-line help for the user and displays licensing information about Total Recall Records Management Software. The Help Menu also allows for a user to Search both the Container and Indexed Item databases for a Container or an Item.

**Search**  The Search Menu allows the user to Search for an Item across both the Container and Indexed Item databases.
Program Concept

Service Codes  Total Recall operates on the theory that every action performed is a service provided for a customer or the user. There are many kinds of services that can be provided, some are chargeable, and others are not. Service Codes help your Center input new containers and charge the appropriate storage fees; index items within containers; track retention schedules; ensure that items are returned in a timely manner; and aid in the movement of containers throughout your facility. Service Codes will also calculate the total cubic feet per customer, allowing storage to be billed by the cubic foot. Work Orders use Service Codes to identify actions to take, and to accumulate statistics for reporting and billing.

Work Orders  Work Order processing is the primary job of Total Recall. Work Orders track and record all activities performed for each Customer. Every activity that affects stored Containers or Indexed Items within Containers is done through a Work Order. This creates an audit trail, which becomes very important when tracing the movement of a Container or Indexed Item.

Work Order processing controls the activity in the Record Center. Total Recall tabulates statistics for every activity recorded on your Work Orders. During Month End processing, statistics are updated for all services. These statistics are used for customer billing, for cost assessment, or simply for reviewing the activity level of your operation. The program calculates the storage fee based on the number of Containers and/or Indexed Items in the facility for each Customer or the total Cubic Feet of Storage per Customer on the day the Month End Close routine is performed. If a Container or Indexed Item is retrieved at the time the Month End Close is performed, Total Recall still maintains the record and storage is charged accordingly. Pro-Rated Storage can also be automatically charged.

Services are billed in arrears, from all closed Work Orders for the current period through a specified Work Order Closed or Due Date.

Total Recall allows for many Billing options, which can be Customer specific. These options include billing Storage by Cubic Feet, billing Services and Storage Quarterly, billing Services Monthly and Storage Quarterly, Semi-Annually or Annually, billing to a Group and automatically billing Pro-Rata and Transportation charges. Total Recall also allows for Invoicing with each Work Order as it is closed. With this feature enabled, each time a Work Order is Closed, an Invoice will be created. Then the Month End Close will create Invoices for Storage only and generate Statistical Data.
Initial Setup

The first step in setting up a warehouse facility is to decide on Fixed Storage or Dynamic Allocation Storage. The table below outlines the differences in the two methods.

<table>
<thead>
<tr>
<th>FIXED</th>
<th>DYNAMIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Containers are labeled with a Location.</td>
<td>• Containers are labeled with unique TR container number.</td>
</tr>
<tr>
<td>• Containers are tracked by Location.</td>
<td>• Containers are tracked by this unique TR container number.</td>
</tr>
<tr>
<td>• Only one Container per Location.</td>
<td>• More than one container per location can and usually does exist.</td>
</tr>
<tr>
<td>• When a Container is Retrieved, the space remains unused until that Container is Returned.</td>
<td>• When a container is retrieved, the space becomes available for another container. When the container is returned it can be scanned into any available location.</td>
</tr>
</tbody>
</table>

Below is a listing of some additional things you may want to keep in mind as you begin setting up your Record Storage business. A well thought out plan is always the best. Think into the future, you may just be starting out now, but where do you see the business in a year or in ten years?

- Keep future expansion in mind when you are setting up your facility. Once you decide on a shelf location layout scheme, it should not be changed.
- Do you want to set default captions for your Reference fields on a System Wide basis? If so, this needs to be done prior to entering your customers.
- How will you uniquely identify your customers? What is the maximum number of characters for this unique identifier?
- Do you need to increase the size of your Description fields or your Reference fields?
• How will you be entering your Work Orders?

  • Fixed Allocation
    • Will you allow the system to automatically allocate the
      next available location to a Container as it is input?
    • Will you assign and enter a location to each Container
      as it is input?

  • Dynamic Allocation
    • Do you want to release the Location when a Container
      is Retrieved? This option if selected will clear the
      location as shown in Total Recall until the Container
      has been returned to inventory. If this option is Not
      checked, the last location the Container resided will
      display with the Container until the Container is
      returned to inventory and has been scanned to a
      location.
    • Will you input a Work Order first, with line details
      including the Total Recall Container number,
      Container Description, Reference data and charges
      such as Transportation, close the Work Order and then
      scan then Containers into an available Location?
    • Or, will you Pre-Assign Labels and send them to your
      Customer for them to place on their containers? If so,
      how will you assign a Storage Code to the Container?
      The system will first look for a Related Storage Code,
      if it cannot find one, it will then check to see if the
      initial Location has been pre-assigned to a Storage
      Code. If not, it will use the Default Storage Code set
      in the System Parameters. The Containers are scanned
      upon receipt and will show in inventory as soon as the
      Work Order is closed usually at import.
Two submenus appear under this option: Add/Edit Individual Security Settings and Security Update Utility. The System Administrator will need to enter the Users and assign access levels to each one. Each user should have their own Security Logon identifier and password. The available access levels depend on the task. The access levels can be any of the following: ‘None’; ‘Read Only’; ‘Add/Edit’; ‘Complete’ or ‘Print’. The Security Update Utility allows the System Administrator to copy the access levels previously assigned to one user to a different user, or copy levels from an existing user to another existing user.

Total Recall for Windows® ships with a set of standard Service Codes. The System Administrator may choose to use these by editing the Pricing and/or the Service Code Description. New Service Codes can be added or the shipped set of Master Service Codes can be deleted.

The Master Service Code list acts as a standard price list for all Services performed within the Center. For each Service code, the System Administrator will need to assign a standard Price and a Description of the Service, the Description will describe the Service Charge on the Work Order. Each Service Code must be three characters and/or numbers and must be associated with one of the 13 categories of services. Many Service Codes allow for Related codes to be associated, this will be explained further in chapter 4. These are Service Code Price “Standards” and can be customized on a customer-by-customer basis.

Each customer must have a Unique Customer Identifier. A customer is defined as a Company or a Department within a Company for which items are stored. Total Recall will track all activities performed for each Customer. The Customer Maintenance screen allows for the user to enter detailed customer information, select billing options, set default options, customize reference field captions, identify departments, list individuals authorized to retrieve or remove containers or items, and list additional customer sites. Saving the initial Customer Maintenance screen prompts the user to add Service Codes. This option creates Customer Service Codes by either adding the Master Service Codes, copying Customer Service Codes from another Customer or if the user has responded to Not Add Service Codes, Service Codes can be added individually to the Customer. Customer Service Codes can be customized on an individual customer basis.
System Tools

Navigational Tool Bar

The Navigational Tool Bar appears throughout Total Recall and is designed to allow the user to manipulate records. A sample of the Navigational tool bar is positioned at the bottom of the Service Code Maintenance screen pictured below.

![Service Code Maintenance Screen](image)

A description of each button and the function of the button is described in the table below and on the following pages.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>First Record</strong></td>
<td>Click on this button and the ‘First’ or ‘Top’ record will be displayed. If you are on the first record, this button will be disabled.</td>
</tr>
<tr>
<td><strong>Previous Record</strong></td>
<td>Click the Previous button to display the record previous to the one currently displayed. If the first record in the database is currently displayed, this button will be disabled.</td>
</tr>
<tr>
<td><strong>Next Record</strong></td>
<td>Click on this button to access the record immediately following the currently displayed record. If the record displayed is the last record in the database, this button will be disabled.</td>
</tr>
<tr>
<td><strong>Last Record</strong></td>
<td>Click on this button to display the last or bottom record in the current database. If the last record is currently displayed on the screen, this button will be disabled.</td>
</tr>
<tr>
<td>Button</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
</tr>
<tr>
<td><strong>Search</strong></td>
<td>The Search button accesses the Boolean Search screen. This screen allows the user to enter specific criteria by which to locate a particular record or group of records in the current database. This Search option filters the records in the database and only displays those records that match the criteria entered. When searching larger databases, this search can be very time consuming, an alternative would be using the Query Builder available throughout the program.</td>
</tr>
<tr>
<td><strong>Print</strong></td>
<td>The Print button allows for the user to access the appropriate print screen to begin processing a report to be either ‘Previewed’ on screen, sent to a ‘Printer’ or sent to a ‘File’.</td>
</tr>
<tr>
<td><strong>Add</strong></td>
<td>Click on the ‘Add’ button to clear the current screen and display a blank screen to enter a new record.</td>
</tr>
<tr>
<td><strong>Save</strong></td>
<td>The ‘Save’ button displays when either the Add or Edit button has been previously clicked and allows the user to Save the new or newly modified record in the database file.</td>
</tr>
<tr>
<td><strong>Edit</strong></td>
<td>The ‘Edit’ button allows for a user to modify the record currently displayed on the screen.</td>
</tr>
<tr>
<td><strong>Revert</strong></td>
<td>The ‘Revert’ button displays when either the Add or Edit button has been selected. Click on the ‘Revert’ button to discard any changes made to the current record and restore the record as it had been prior to the last Save.</td>
</tr>
<tr>
<td><strong>Delete</strong></td>
<td>Marks the currently displayed record for Deletion. Any record deleted will no longer be displayed, although, the record still exists in the database until the database is compacted. Once the databases are compacted, the record is completely erased from the database.</td>
</tr>
<tr>
<td><strong>Exit</strong></td>
<td>Click on the ‘Exit’ button to close the current screen and return to the previous screen or the Main Menu.</td>
</tr>
</tbody>
</table>
Search

The Search function is found on nearly all the Navigational Tool Bars. It functions to filter records based on specific criteria entered by the user. Only the records matching the criteria entered will be displayed on the screen. A screen similar to the one below displays when a Search button is selected. Note: When attempting to search for records from the Container or Indexed Item databases, you may find the Query Builder a quicker search mechanism with more functionality.

Whenever the Search function is invoked, the user selects the Primary Search Field, an Operator, and enters the Search Value. The search can then be initiated by clicking on the <Search> button. The user can Add up to six Search Conditions and make the Search either a Compound Search (using ‘AND’) or a Conditional Search (using ‘OR’). A combination of a Compound and a Conditional Search can also be initiated.

**Compound Search**
The user may make a search **Compound** by requiring that two sets of criteria be met before the record is selected. Use the ‘AND’ option to link the criteria statements.

**Conditional Search**
The **Conditional** Search is the opposite from the Compound Search. With the Conditional Search, two sets of criteria are entered, but a record only has to meet one **OR** the other criteria to be selected. The Conditional Search uses the ‘OR’ option to link the criteria statements.
The table below details the fields on this screen.

<table>
<thead>
<tr>
<th>Total Recall Table Field</th>
<th>Click on the down arrow and a list of available fields will be displayed. Scroll down the list, highlight your choice, and double click with the mouse to display your choice or enter the field name.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Operator</strong></td>
<td>Choose how to select records by selecting a Boolean Operator. Click on the arrow button to the right of the Operator field, scroll down the list, highlight your choice, and double click to select the Boolean Operator or simply enter the Operator. Below is a list of the Boolean Operators and their actions:</td>
</tr>
<tr>
<td><strong>Equals</strong></td>
<td>The Field and the data entered in Value must match exactly.</td>
</tr>
<tr>
<td><strong>Not Equals</strong></td>
<td>The Field and the data entered in the Value do NOT match.</td>
</tr>
<tr>
<td><strong>More Than</strong></td>
<td>The search locates items where the value of the selected Field is ‘More Than’ the amount entered in the Value field. This field can be alpha, numeric or a combination of characters.</td>
</tr>
<tr>
<td><strong>Less Than</strong></td>
<td>The search locates items where the value of the selected Field is ‘Less Than’ the amount entered in the Value field.</td>
</tr>
<tr>
<td><strong>Is Blank</strong></td>
<td>The ‘Value’ field would be left blank when this option is selected. Total Recall searches for the records where the field selected contains no data.</td>
</tr>
<tr>
<td><strong>Is Null</strong></td>
<td>Not commonly used, often used to show an empty field instead of the word ‘NULL’ in a field that allows nulls.</td>
</tr>
<tr>
<td><strong>Contains</strong></td>
<td>Use this operator when you only want to enter part of the ‘Value’ or you are not sure of the entire field ‘Value’. This ‘Value’ entered for this search will be searched for throughout the entire Table Field.</td>
</tr>
<tr>
<td><strong>In</strong></td>
<td>Allows user to compare one value to a list of values. The values must be listed in the value field separated by commas.</td>
</tr>
<tr>
<td><strong>Between</strong></td>
<td>The Between operator allows the user to locate records that fall between specified data including any exact matches of the specified data. Separate the values by a comma.</td>
</tr>
<tr>
<td><strong>Search Value</strong></td>
<td>This field is for the user to enter the <strong>Search Value</strong> or the Criteria in which the program is to search for in the ‘Field’ selected.</td>
</tr>
<tr>
<td>------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Case Sensitive</strong></td>
<td>Click on the ‘<strong>Case Sensitive</strong>’ checkbox to force the search using the exact case (Upper case, Lower case or Mixed case) entered in the Value field.</td>
</tr>
<tr>
<td><strong>Set Exact Off</strong></td>
<td>If the ‘Set Exact Off’ option is selected, the Search will attempt to locate all records that exactly match or almost match the Search criteria. The default for this selection is to not have it selected, in this case only those records matching the data entered exactly will be selected.</td>
</tr>
<tr>
<td><strong>Search</strong></td>
<td>After the Field and Operator have been selected and the Value entered, click on the <strong>&lt;Search&gt;</strong> button to begin the database search for the records requested. <em>Note: Depending on the size of the database, the speed of your computer/network, the number of users in the system, and the search criteria, this Search can take from several seconds to much longer. Refer to the Query Builder as an alternative to the Search function.</em></td>
</tr>
<tr>
<td><strong>Show All</strong></td>
<td>When a user invokes a Boolean Search, only those records matching the search criteria will display. To re-display all the records in the current database, simply click on the <strong>&lt;Show All&gt;</strong> button.</td>
</tr>
<tr>
<td><strong>Cancel</strong></td>
<td>Click on the <strong>&lt;Cancel&gt;</strong> button to discontinue the Search and return to the previous screen.</td>
</tr>
</tbody>
</table>

**EXAMPLE:** You have a customer that is an eye clinic, but you don’t remember the exact name of the business. The screen could be set as follows: Field = “Company”, Boolean Operator = “Contains”, and Value = “Eye”. Unless you are certain about capitalization in the value, do not mark “Case Sensitive.” If Case Sensitive is marked, records that contain EYE will not be considered a match if the search value was “Eye”. Click the **<Search>** button. Total Recall will search the Company field looking for any records that contain the word ‘eye’. Upon completion of the Search, only those records that contain the word ‘eye’ in the Company name field will display.
Query Builder

The Query Builder can be accessed from individual lines on a Work Order when a Container or Indexed Item is being either Retrieved, Re-filed or Removed. It can also be accessed throughout many of the Menu options in Total Recall. The Query Builder functions in much the same way as the Search screen, but it is quicker and allows for the complete Results or portions thereof to be imported into Work Order lines, Exported from Total Recall into a standard database/spreadsheet format, Printed, or the Query Builder allows the results to be globally changed using the ‘Replace’ function.

Once a Query is built, that Query can be Saved to be Recalled and modified if necessary and run again at a later date.

When a Query is invoked, the ‘Select Customer’ screen displays allowing the user to enter the Customer number, if the Query is to be customer specific. By entering a Customer number, Total Recall narrows the Query search to the specified customer only, therefore allowing the Search to run quicker by searching a smaller database of records. The Customer number becomes the first line of the Query Builder if a Customer is designated, this Query line cannot be modified. If the Query is NOT customer specific, leave the Customer field blank. Click the <Continue> button to display the Query screen.

A screen similar to the one on the next page displays when the Query Builder option is selected and a customer has been specified.
As with the Search Feature, when the Query Builder is invoked, the user selects a Primary Field to Search on, an operator to use, and enters the ‘Search Value’ or criteria. The Query can then be initiated by clicking on the <Run Query> button.

A Query can have up to six (6) criteria statements and the Search feature can make each Filter either Compound (using ‘AND’), Conditional (using ‘OR’) or a Combination search.

The following table details the fields on the Query Builder screen.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Recall Table Field</td>
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</tr>
<tr>
<td>Operator</td>
<td>Choose how to select records by selecting a Boolean Operator. Click on the arrow button to the right of the Operator field, scroll down the list, highlight your choice, and double click to select the Boolean Operator or simply enter the Operator. Below is a list of the Boolean Operators and their actions:</td>
</tr>
<tr>
<td></td>
<td><strong>Equals</strong> - The Field and the data entered in Value must match exactly.</td>
</tr>
<tr>
<td></td>
<td><strong>Not Equals</strong> - The Field and the data entered in the Value do NOT match.</td>
</tr>
</tbody>
</table>
**More Than** - The search locates items where the value of the selected Field is ‘More Than’ the amount entered in the Value field. This field can be alpha, numeric or a combination of characters.

**Less Than** - The search locates items where the value of the selected Field is ‘Less Than’ the amount entered in the Value field.

**Is Blank** - The ‘Value’ field would be left blank when this option is selected. Total Recall searches for the records where the field selected contains no data.

**Is Null** - Not commonly used, often used to show an empty field instead of the word ‘NULL’ in a field that allows nulls.

**Contains** - Use this operator when you only want to enter part of the ‘Value’ or you are not sure of the entire field ‘Value’. This ‘Value’ entered for this search will be searched for throughout the entire Table Field.

**In** - Allows user to compare one value to a list of values. The values must be listed in the value field separated by commas.

**Between** - The Between operator allows the user to locate records that fall between specified data including any exact matches of the specified data. Separate the values by a comma.
<table>
<thead>
<tr>
<th><strong>Search Value</strong></th>
<th>This field is for the user to enter the <strong>Search Value</strong> or the Criteria the program is to Search for in the ‘Field’ selected.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1st Order By</strong></td>
<td>Click on the Down Arrow button to the right of this field to display a listing of fields. Select the field you want to use as the Primary Sort Order for the selected records. If a sort order is not specified, the records will be sorted in Total Recall Container number order.</td>
</tr>
<tr>
<td><strong>2nd Order By</strong></td>
<td>If a secondary sort order is necessary, click on the Down Arrow button to the right of this field to display a listing of fields. Select the field you want to use as the Secondary sort order.</td>
</tr>
<tr>
<td><strong>Case Sensitive</strong></td>
<td>Click on the ‘Case Sensitive’ checkbox to force the locate of the search indicated using the exact case (Upper case, Lower case or Mixed case) as they are entered in the Value field.</td>
</tr>
<tr>
<td><strong>Set Exact Off</strong></td>
<td>If the ‘Set Exact Off’ option is selected and the Search will attempt to locate all records that exactly match or almost match the Search criteria. The default for this selection is to not have it selected, in this case only those records matching the data exactly entered will be selected.</td>
</tr>
<tr>
<td><strong>Save Query</strong></td>
<td>This feature allows the user to Save a Query either as soon as the Query is created or after the Query has been run. When the user invokes this screen, a screen will display allowing the user to enter a Query Description for easy identification the next time the Query is needed. The system will automatically assign a sequential number to the Saved Query. To run this same Query again, from the Query Builder screen, click on the ‘Saved Queries’ tab, highlight the Query to be run and click the button &lt;Recall Query&gt;. The Query will display on the screen and the user has the ability to change information if needed and re-run the Query.</td>
</tr>
</tbody>
</table>
Show Query | Click on this button to see the actual Query built from the criteria selections made. The programming language of the Query will display in the blank field beneath the buttons. This Query can then be edited and run independently from the original query by clicking the <Run Interactive> button.

Run Query | Once all the fields have been entered, click on the <Run Query> button to begin the database search for the records requested.

Exit | Click on the <Exit> button to exit the Query Builder and return to the Main Menu.

Run Interactive | This button allows the user to run an altered Query that currently displays in the field to the immediate left of this button.

When the Query is complete, a message box will display prompting the user of the number of records that were selected and asking whether or not the records are to be displayed. If the prompt is answered with ‘NO’, the ‘Query Builder’ screen will display allowing for another Query to be built or allowing to Exit to the Main Menu. If the prompt is answered with ‘YES’, the ‘Query Results’ screen will display.

From the ‘Query Results’ screen, the user has several options besides scrolling through the records: Globally Replace field data for all records displayed, Export the file to a standard format, Print up to six fields of data or if the Query was entered from a Work Order, the results can be exported back to the Work Order.

The user also has the option to select one record, several records or all records. To select all records, click the <Mark all Y> button, all the records will display highlighted. To select only certain records, use the mouse to click on the records to be selected, the first column, ‘Select’ will change to ‘Y’ and the entire record will highlight. To select the majority of the records, click on the <Mark all Y> button and then click on the records that are NOT to be selected. The highlight will disappear and the ‘Select’ column will display as ‘N’. If all records have been highlighted, the user can de-select all records by clicking the <Mark all N> button.
Replace Query Data

To Globally Replace the data in a specified field for all records displayed, click the <Replace> button. The screen below will display

![Global Replacement Screen](image)

Fig. 1.6

Click the Drop Down arrow ↓ to the right of <Replacement Field> and highlight the field that you would like to globally change. In the field directly below, <Replace With> enter the data in the appropriate case that you would like displayed in the designated field. Click the <Replace> button to proceed with the changes or click the <Exit> button to cancel the process. If records have not been selected, the system will prompt the user: ‘You must first select the records you wish to update!’ Select the records to be Replaced and click the <Replace> button. A Warning Screen, similar to the one below, will display alerting the user to the exact number of records that are to be altered.

![Warning Screen](image)
The user will then elect to <Continue> and change all the records or <Cancel> and exit the screen without altering any records.

**IMPORTANT: This option should be used with Extreme Caution!** Data that is globally Replaced using this feature cannot be recovered. If any data exists in the field that is selected for replacement, that data will be overwritten. Many times the only way to recover from a wrong replacement is to pull a back up tape and restore previous data. All work that was entered between the backup and the current time must be re-entered.

**Export Query Data** To Export the Query results to a standard file format, click the <Export File> button from the Query Results screen and the screen below will display.

![Export Query](image)

Specify the type of File to be exported and enter a File Name in the ‘Export File Name’ field including a File extension if necessary. Select the <Find File> button to navigate to a directory other than where Total Recall is currently running or enter a path where the file is to be located and the file will be found in the path indicated. Click the <Export> button to create and Export the file.
If records have not been selected, the system will prompt the user: ‘You must first select the records you wish to export!’ Select the records to be Exported and click the <Export> button.

When the export is complete, the system will prompt the user: ‘Export Complete! File x:\directory\xxxxxxx.xxx has been created.’ If no path is entered at the time of the export, the newly created file will be found in the Recall Directory.

Click <Cancel> to close the Export Query screen and quit the Export.

One to WO  If the Query Builder was accessed through a Work Order, results can be exported back to the work order. Entering the Query Builder from the Work Order automatically enters the first line of the Query with the Customer number. To Export only one line of the results to the Work Order, select the line by clicking and highlighting the line, changing the select column to ‘Y’. Click on the <1 To WO> button. This will then create a Work Order line for the selected record only. Note: If a record was not selected the first record will be sent to the Work Order. Upon import, the program will prompt the user to the number of lines imported.

All to WO  If the Query Builder was accessed through a Work Order, results can be exported back to the work order. Entering the Query Builder from the Work Order automatically enters the first line of the Query with the Customer number. To send all the lines to the Work Order, select all records by clicking the <Mark all Y> button. Click the <All to WO> button. This will then create a Work Order Line for each record listed. Upon import, the program will prompt the user to the number of lines imported.
**Selected**  
If the Query Builder was accessed through a Work Order, results can be exported back to the work order. Entering the Query Builder from the Work Order automatically enters the first line of the Query with the Customer number. Select the records to be sent to the Work Order by highlighting the records or by using the <Mark all Y> or the <Mark all N> buttons.

When all the records have been selected, click on the <Selected> button and all highlighted records will be imported to the Work Order. This will then create a Work Order Line for each record listed. Upon import, the program will prompt the user to the number of lines imported.
CHAPTER TWO
Logging Into Total Recall
CHAPTER 2

Logging Into the Total Recall

Overview

Security is critical to the operation of any program, and Total Recall is no exception. To ensure that unauthorized persons do not have access to the records in this program, each user must enter their assigned user ID and password before they can access the program. To protect from unauthorized use, each user should access the Log Off feature from the file menu, when their tasks are completed. The system administrator can add, edit and delete users through the program’s security menu option.

When Total Recall for Windows is accessed, the initial screen that displays is the security logon screen. The screen in Fig. 2.1 will be displayed.

The first field is for the user’s identification code (User ID). This code serves as a means to identify the user to the system and can be a first name, last name, employee number or any other identifier the system administrator chooses. This must be a unique identifier. Throughout Total Recall this user ID displays to identify the user logged on at the time the record was created or updated. Each user ID must be at least three characters and no more than 8 characters.
Type the user ID in the field provided and press the <Enter> or <Tab> key or use the mouse and click in the <Password> field. The second field is for the user’s Password. The password should be unique for the user ID and can be from three to eight characters/digits in length. Type the password in the field provided and with the mouse click on the <OK> button or press the <Enter> key twice. Provided a valid ID and password have been entered, the user will then gain access to Total Recall.

If the user enters an invalid identification code or password, the program will not allow the user to continue and will display the alert screen on Fig 2.2, indicating that the user has entered an incorrect ID or password.

The user then has the opportunity to re-enter their user ID and password by simply clicking on the <Retry> button. The security log-on screen will display for the user to once again attempt to log into the system. If the user chooses not to log into Total Recall, click on the <Cancel> button. This will terminate the Total Recall program and return the user to the desktop.
If the user has four unsuccessful logon attempts the message on Fig. 2.3 will display.

Unsuccessful Logon Message

![System Message]

You have exceeded the authorized number of log on attempts!

OK

Fig. 2.3

The user will click <OK> and contact the system administrator.

Once the correct user identification code and password have been entered, the Total Recall for Windows main menu will display.

Note: Logon names and passwords are not case sensitive.

*** The default User ID and Password when Total Recall is initially installed is “USER” For both the user ID and the password. Refer to security (Chapter 10) for details on how to add, edit and delete user information. ***
CHAPTER THREE
File Menu
CHAPTER 3

File Menu

Overview

The File Menu in Total Recall contains functions used on a daily basis. With this option, the user can create and edit work orders, upload bar code scanner information, import work orders from the Web Server, schedule recurring work orders, export work orders for use in another version of Total Recall, transfer an item to another individual, log off and exit Total Recall. The user can access the file menu by clicking on the menu with the mouse, or by holding down the [ALT] key while pressing the letter [F] on the keyboard. The user can move throughout the file menu using the mouse or using the arrow keys on the keyboard. To select a menu option, highlight the option and click with the mouse or on your keyboard, type the underlined letter of the menu option.

Fig. 3.1 displays the file menu, followed by a brief description of each option. Each menu option is then covered in detail in this chapter. Chapter 4 details the bar code scanning option.

File Menu

<table>
<thead>
<tr>
<th>File Menu</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Work Order</td>
</tr>
<tr>
<td>Edit Work order</td>
</tr>
<tr>
<td>Apex II Portable Bar Code Options</td>
</tr>
<tr>
<td>Symbol Utilities</td>
</tr>
<tr>
<td>Web Server Functions</td>
</tr>
<tr>
<td>Scheduled Recurring Work Orders</td>
</tr>
<tr>
<td>Export Work Order For Use In Another Version Of Total Recall</td>
</tr>
<tr>
<td>Transfer A Retrieved Item To Another Individual</td>
</tr>
<tr>
<td>Log Off</td>
</tr>
<tr>
<td>Show Tool Bar</td>
</tr>
<tr>
<td>Exit</td>
</tr>
</tbody>
</table>

Fig. 3.1

New Work Order This menu option allows the user to create a new work order for services requested by a Customer or for internal warehouse maintenance. Work orders provide a means to create an audit trail every time a container or item is touched, whether it is relocated, retrieved for a customer or destroyed at the customers’ request.
| **Edit Work Order** | This option allows the user to edit or view an existing work order. To select the work order record to be edited, the user can elect to view ‘Individual Records’ or ‘Browse the List of Records’. The ‘Individual Records’ option takes the user to the first work order created for the current billing period. From this screen the user can use the navigational tool bar to select the work order to be edited or viewed or enter the number associated with the work order to be edited in the appropriate field. The ‘Browse List of Records’ option displays a listing of all work orders for the current billing period. From this screen the user has many options. A quick Search can be done by the work order number or by the customer number. A work order can be opened by entering the work order number into the ‘Open WO’ field. A new work order screen can be initiated. A search can be done to filter specific records. Work orders can be batch closed. Work orders can be printed. Work order and operational reports menus can be accessed and those reports can be printed. |
| **Portable Bar Code Options** | This option allows the user to import data from the handheld scanner. The submenu options available under this option include: import work order data; import container work order data; send a ‘pick list’ to the Apex; retrieve a ‘pick list’ from the Apex; verify inventory; verify retrievals; verify put away; import relocate files data; corporate direct access; tape management system; import new containers with customer box #; and permanently relocate an indexed item to another container. When data is uploaded from the handheld scanner, in most cases a work order, scan log and error report (if any errors exist) are automatically created. These features will be covered in detail in chapter 4 – Scanning. |
| **Web Server Functions** | This option allows for a user to import work order data from a customer that is using the web server module. |
| **Scheduled Recurring Work Orders** | This option allows the user to schedule recurring work orders that recur more often than monthly. The user can add and schedule recurring work orders, view all previously entered recurring work orders, and convert recurring work orders to active work orders that can then be printed in advance. |
| **Export Work Order** | This option allows the user to interface with a client version of Total Recall. |
| **Transfer a Retrieved Item** | This option allows for a user to scan a bar coded file that is currently retrieved and scan an individual user ID bar coded name badge with a keyboard wedge and transfer the file to another individual. |
**Log Off**  This option allows the user to log off the Total Recall program, leaving the Logon screen displayed.

This option allows the user to display the tool bar on the main screen.

**Exit**  This menu option will allow the user to exit Total Recall and return to the desktop.
Work Orders

The first two options under the file menu allow the user to create a new work order or edit an existing work order. Work orders track all the services provided for a customer and all containers and indexed item movement. Services can include adding new containers or indexed items, temporary retrieval of a container, an indexed or non-indexed item, permanent removal of a container or indexed item, relocations, and miscellaneous services performed for a customer. The work order establishes the billing for the services performed. The ‘Work Order Input’ screen is shown on Fig. 3.2.

There are three main parts to the work order screen: the Header, the Lines ‘Tab’ and the General ‘Tab’. In this chapter, these three sections of the work order are described in detail.

The Header

The <Customer> field is a required field. The requestor and work order description fields can be set to be required in the system parameters screen. Other fields are optional, but depending on the setup may automatically fill in the appropriate data. The fields on the header portion of the work order screen are detailed in the table below and on the following pages. Once the header has been completed it must be saved in order for the user to proceed with the work order. Saving the header assigns a unique work order number and enables the function buttons directly below the ‘lines’ grid area. After the header has been saved, it can be edited by clicking the <Edit> button at the bottom of the screen. This <Edit> button also controls the editing capabilities on the general ‘Tab’. 
Work Order  “NEW-xx” will display in the work order field until the work order header has been saved. Total Recall will automatically assign the next sequential work order number when the work order header is saved. This number is then tracked throughout Total Recall.

WO Descriptive Type  This field allows the user to enter or select a description of the general activity being performed on the work order such as retrieve and deliver next day, add new containers or file indexing. These descriptions can be set up to be uniform and then be selected from a list. Note: See Chapter 5 - Maintenance, for information in setting up the work order descriptions. This field may or may not be a required field depending upon the system parameter settings. This field can be setup to automatically fill in the work order priority, the trip transportation code, the due date and the due time.

Printed  This checkbox will indicate whether or not the currently displayed work order has been printed. No check mark indicates the work order has NOT been printed, a check mark indicates that the work order has been sent to a printer. If a work order is previewed on the screen or sent to a file the ‘Printed’ checkbox will not display a check.

Customer  Each customer has a unique customer number, enter this unique number of the customer requesting a service to be performed. If the customer number is unknown, click on the binoculars to the right of the field and a listing of all customers will display. The user can simply begin typing in the company name until the indicator is to the left of the record to be selected. The user can then either click the <Select> button at the bottom of the screen or press the [ENTER] key on the keyboard twice. The customer number will then display in the field.

Name  After the customer number has been entered or selected, Total Recall will automatically display the corresponding customer name.

The <Edit> button is enabled after a customer number has been entered. By clicking this edit button, the user is taken directly to the customer maintenance screen for the customer indicated. This allows the user to look up pertinent information or modify information for the selected customer only.
If service has been discontinued for a customer, a message prompt will display immediately upon selecting that customer: “Service has been discontinued for client customer number – customer name! Do you wish to view the customer record?” By clicking <Yes> the customer maintenance screen for that customer will display, the user will have the opportunity to de-select the <Discontinue Service> if the decision is made to service the customer. Once the <Discontinue Service> option has been de-selected and the change saved, the user will click the <Exit> button to return to the work order screen. Clicking <No> will blank out the customer number and the field will be enabled to enter a different customer number.

**Dups on Adds** This feature allows for duplication of the previous work order line screen when adding multiple lines to a work order. This feature can be perpetually engaged through the system parameters screen. *Note: See Chapter 10 – System Menu – Parameters screen – Work Order System Parameters, for more information on perpetually engaging this feature.*

**Empty/Notes** This feature will display notes that do not print on work orders if notes were added in the customer maintenance screen.

**SCOD** This button will bring up the Scan On Demand screen. This feature is only available if the Scan On Demand module was also purchased.

**Act Not Indexed** This box will be checked only if you have selected the feature: ‘Do Not Maintain a Perpetual List of Indexed Items’ on the customer maintenance screen – defaults tab screen for the specified customer. This is an indicator that the customer selected is NOT itemized indexed and when a non-indexed item is returned to the container, history is updated and the item will no longer display in the items in containers inventory.

**Request By:** This field indicates the person requesting the service. The drop down box displays a listing of the security authorizations associated with the specified customer. The user can use the mouse to select the person requesting the service. This field is a ‘Walk-a-long’ field, that allows for quick entry of the selection provided the requestor is listed in the drop down listing. If the requestor is not in the listing, the user should enter the person. This name will then be transferred to the work order line as the person requesting the service. If this person does not appear in the security authorization listing and security has been engaged for this customer, the requestor must indicate who the request is for and this name must be indicated on the work order line or the request will not be able to be completed. This field may or may not be a required field of entry depending upon the parameter settings in the system menu. *Note: See Chapter 10 – System Menu – Work Order/Space Allocation, for more information on requiring entry to this field.*
Base Trans SC: This field will only display if specific Requirement Codes were set up in the Minimum Transportation fields of the Customer Maintenance screen for the selected Customer. The Requirement Code entered also determines if this field is editable. Note: Depending on the transportation setup (if any) in the customer maintenance screen and the priority setup, this field may be automatically entered. Refer to Chapter 5 – Maintenance – Customers – Minimum Transportation Settings or the Quick Reference Guide titled ‘Automatic Transportation Options’, for information on automating the transportation charges.

Prepared By: This field will automatically default to the user logged into the system at the time the work order is created. This field can be edited and changed. When using a handheld scanner, upon import the user ID that was input into the scanner will display in this field.

Status: This field displays the current status of the work order: ‘Open’, ‘Updated’, ‘Lines Added’ or ‘Closed’. When the work order is created, Total Recall assigns the status as ‘Open’; the status remains open until the work order is closed by a user. Once a work order is closed the work order along with all the individual lines on that work order reflect a ‘Closed’ status. Closing a work order updates inventory therefore work order lines cannot be deleted nor can information that is sent to inventory be changed after the work order has been closed. Additional lines can be added to a closed work order. If an ‘Other’ billing line is added, the work order status does not change and the line status reflects as ‘U’ for ‘Updated’, this item will automatically bill. If additional lines are added that involve container or items, the status of the work order will be automatically changed to ‘Lines Added’ and the Work Order will need to be re-closed in order to be included in the month end billing.

Priority: This field is used to assign a priority level to the work order. These priorities can be set up and attached to the work order descriptions and be automatically entered. Note: See Chapter 5 – Maintenance – Priority Code Setup – for information on setting up priority codes.

Order Mthd: This is a one-character field to indicate how the request was received by the record center. For example, an ‘F’ may indicate faxed request and a ‘P’ may indicate phone request and ‘E’ indicates an E-mail Request.

Due Date: This field will automatically fill in if a work order description that is selected indicates the number of days to be added to the current days date to create the due date. This field can be edited. Note: See Chapter 5 – Maintenance – Work Order Description - for information on setting up the due date connected to the work order description.
**Due Time:** This field will automatically fill in if the work order description that is selected indicates the number of hours to be added to the create time or the actual time to be entered depending on the work order description selected. *Note: See Chapter 5 – Maintenance – Work Order Description Maintenance - for information on setting up the Due Time connected to the work order description.*

**TD** Once lines are added to the work order, this button toggles between sorting the work order lines in terminal digit order (provided that the medical record number was entered into the reference 1 field) and in work order line number order. If this is a medical records account and the medical record number has been entered into the reference 1 field, by clicking this button the work order lines will be sorted in terminal digit order on the screen. If the year of service has been entered into the reference 3 field, it will first sort by reference 3 – year of service and then by reference 1 in terminal digit order. The order changes back automatically to the work order line number order when this screen is exited.

**Go To WO#** To quickly access a different work order, key in the work order number in the ‘Go To WO#’ field. If you enter a full 6-digit work order number, the work order will automatically display. If less than six digits are entered, press the [ENTER] key and the selected work order will display.
The Lines Tab

The **Lines** ‘Tab’ of the work order screen is where you will enter the services to be performed for the selected customer. This ‘Tab’ becomes enabled when the header has been saved. Specialized Function Buttons are used to expedite the work order line input process. Located just above the navigational tool bar, these Function Buttons allow the user to enter the specialized screens for the specific activity to be performed for the customer such as adding, retrieving, re-filing or relocating containers or indexed items. An additional button allows for the input of miscellaneous services or additional charges. The Function Buttons are displayed on Fig. 3.3. *Note: These buttons are user definable and may display differently in your version of Total Recall.*

<table>
<thead>
<tr>
<th>Function Buttons</th>
<th>Add Container</th>
<th>Retrieve Container</th>
<th>Refile Container</th>
<th>Remove Container</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Add File</td>
<td>Retrieve File</td>
<td>Refile File</td>
<td>Remove File</td>
<td>Relocate</td>
</tr>
</tbody>
</table>

![Fig. 3.3](image)

When a function button is selected by using the mouse and clicking on the button, a related input screen will display. Each time one of these screens is saved, a line is added to the work order. A detailed description of each function button and the related input screen follow this introduction.

To the right of the function buttons is an ‘**Edit Line #**’ field that allows the user to enter a line number and press the `[ENTER]` key, then the associated work order line screen displays.

To the right of the ‘**Edit Line #**’ field is a cluster of five buttons: These five buttons are detailed briefly below and are detailed later in this chapter.

- **Labels** This button allows the user to print either container or file labels corresponding to the lines on the work order.

- **Highlighting the work order line and clicking the edit button will open the work order line for editing.**

- **Verify** This button allows the user to delete an individual work order line.

- **Verify** This button allows for verification of the accuracy of the items pulled to the work order lines.

- **Close Work Order** The close work order button allows the user to finalize the work order and update the inventory.
Function Buttons

Add Container
Listed below are the options available for adding containers to inventory dependent upon the allocation in which the record center is running.

Dynamic Allocation
• Scan containers upon receipt at the warehouse, containers can be pre-labeled by the customer or labels can be printed at the record center upon receipt. These labels are typically pre-assigned to the owning customer. This option will be discussed in detail in Chapter 4 – Scanning.
• Standard container add screen
• Rapid container add screen

Fixed Allocation
• Standard container add screen

Standard Container Add Screen
Click the <Add Container> button to add a container to inventory using the standard container add screen. This is the primary entry screen for adding containers in fixed allocation, but is also available for dynamic allocation.

Complete the screen and click on the <Save> button, this will add a line to the current work order. The ‘Add Container’ screen will remain available for additional entry of containers. If the ‘Dups on Adds’ feature has been activated a screen identical to the saved screen will display, the user will be able to change only the data that differs for the next container and <Save> the screen. Without the ‘Dups on Adds’ feature activated, a blank input screen will display for entry of the next record with each <Save>. The ‘Dups on Adds’ feature can be perpetually engaged in the system parameters screen. Note: See Chapter 10 – Parameters – Work Order/Space Allocation – Work Order Parameters – for more information.

Click on the <Exit> button to return to the work order input screen. If the ‘Dups on Adds’ feature is engaged, the following message may appear when the <Exit> button is clicked: ‘Do you want to save your work?’ This message refers to the newly created screen displayed when the line was saved. If you have added an additional line since the last save, select <Yes> to save the line, otherwise select <No>. To set the program to not display this message upon <Exit>, take off the check to the left of ‘Confirm saves on Exit’ on the system parameters screen. Note: See Chapter 10 – Parameters – Work Order/Space Allocation – Work Order Parameters – for more information on this feature.
The screen in Fig. 3.4 displays when the `<Add Container>` button is clicked on the work order input screen. A description of each field on the screen immediately follows.

### ‘Add Container’ Standard Screen

**Setup Code** This field refers to the initial input of a container, and the charges associated with this one time activity. Click on the down arrow key to the right of this field to view the available setup code choices. The choices that appear here are those that were set up as a category code ‘3’ on the master service code or customer service code screens during setup. This is a walk-a-long field. Begin entering the setup code and press [ENTER] when the selection is displayed or select a setup code from the available list by using the mouse to highlight and click on the appropriate code, or use the arrow keys on the keyboard to locate the code and press the [ENTER] key.  
*Note: See Chapter 5 - Maintenance Menu – Master Service Codes or Customer Service Codes to add additional setup codes to your master service codes or customer service codes listings.*
**Store Code**  This field refers to the storage code associated with the recurring monthly storage charge for the container. The choices that appear here are those that were set up as a category code ‘4’ on the master or customer service code screens. Click on the down arrow \( \downarrow \) key to the right of the store code field to view the listing of available monthly storage codes. This is a walk-a-long field. Begin entering the choice and press [ENTER] when the selection is displayed, or select a storage code from the available list by using the mouse to highlight and click on the appropriate code, or use the arrow keys on the keyboard to locate the code and press the [ENTER] key. When the storage code has been selected, if a cubic size has been associated with the storage code it will automatically display in the ‘Cubic Feet’ field. Note: For customers that are being charged storage by the cubic foot, no charge is associated with this storage code but a cubic size must be associated with the code, or a cubic feet number must be entered into the appropriate field.

**Cubic Feet**  This field defaults to the cubic footage associated with the monthly storage code selected, if the cubic feet has been associated with the storage code entered. This field can be edited as needed. If storage is being charged by the container, this field can be used to calculate total cubic footage per customer and for the entire record center. If the container being entered is a miscellaneous size container, enter the actual cubic size of the container in this field.

**Auto Allocation Features**  This feature is pertinent to Fixed Location Storage only.

**Mixed Storage Area** – Allows you to store a number of different size containers on the same shelf. The shelf must be designated as ‘Mixed Storage Area’ on the facility layout screen. By checking this box the user can enter a location set up as ‘Mixed Storage’ and enter any monthly storage code. Click to select or de-select; a check mark enables this option. An empty box disables this option.

Do Not Verify Location – When a container is added to inventory and the location has been entered manually, with this feature selected, Total Recall will NOT verify the availability of the location entered. Total Recall will only verify that the container was not previously added. Without this option selected, Total Recall will verify the location. A check mark in this box will enable the ‘Do Not Verify’ feature, no check mark disables this feature.
**Location**  **Fixed Location Storage** – (Required) Total Recall tracks each container through the unique location address. If ‘**Automatic Allocation**’ has been enabled in the system parameters screen, Total Recall will automatically enter the next available location depending on the monthly storage code entered for the container. *Note: See Chapter 10 - System - Parameters – Work Order/Space Allocation ‘Tab’ for more information on the auto allocation option.*’ The user has the option to manually enter a location for the container or to view available locations by clicking on the binoculars button 🕵️‍♂️ to the right of the location field. While viewing the list of available locations, a location can be selected by highlighting the choice and clicking on the `<Select>` button. This will transfer the selected location to the container input screen. If the ‘**Automatic Allocation**’ feature is not enabled, a unique location must be entered into the ‘**Location**’ field. This unique location can be selected from the list of available locations by clicking on the binoculars button 🕵️‍♂️ to the right of the location field. Highlight the location selection and click on the `<Select>` button, this will paste the location into the container add screen.

**Dynamic Allocation** – Total Recall will allow for this location field to be left blank, this will allow for the location to be scanned using a handheld bar code scanner. The Container will be listed in inventory with a blank location until the containers have been scanned relocating them to their shelf locations. The user also has the option to enter a location manually as the container is being entered into the program.

**T.R. Con #**  **Fixed Location Storage** – Total Recall will automatically assign a unique Total Recall container number each time this screen is saved.

**Dynamic Allocation** – The Total Recall container number tracks the container throughout the program. This is a unique number. This number can be entered manually, assigned when the line is saved, or be pre-printed and adhered to the container for scanning immediately upon receipt at the record center.
Dept  This field is for the user to enter the owner department for the container. If
the customer account has been set up to require a department to be entered,
the screen cannot be saved without selecting a department from the listing.
Select the owner department to be associated with the container listing in
inventory. The department field is a ‘walk along’ field, so as letters are
entered into the field the closest match will display. As the correct
department displays, simply press the [ENTER] key on the keyboard to
accept the current selection. To see a listing of available departments,
click the down arrow to the right of the ‘Dept’ field. Viewing the
department listing using the mouse or arrow keys on the keyboard, the user
can highlight the selection and either use the mouse to double click or
press the [ENTER] key to accept the selected department.

Item Type  The item type allows the user to set up the different ‘types’ of items being
stored and assign this ‘type’ to each record in inventory. Note: If the web
server module is in use, item types MUST be set up to pull customized
captions throughout the web server screens. Typically the item types used
are ‘BOX’ to identify a container and ‘FILE’ to identify a file regardless of
whether the file is stored in a container or on a shelf.

If record series are being used, the item type can be associated with the
record series and will automatically display on the ‘add’ screens when the
record series is selected. Note: See Chapter 5 to set up item types.

Description  The caption on this field is customizable and may or may not display as
‘Description’. This field is used to describe the overall contents of a
container. If it is necessary to enter a more lengthy description, click on
the <Empty> button to the right of this field, and enter additional
information. Upon saving this additional information, the caption for the
<Empty> button will change to <Memo>, indicating that data has been
entered and saved. Note: It is recommended to keep descriptions brief and
avoid using the memo field, this will allow for quicker, more efficient
searches. It is NOT recommended to list all files contained within the
container in these fields, this is done more efficiently through file-by-file
indexing.

Recd Series  A Record Series is many times associated with a Retention Code, which
will automatically calculate a Containers Expiration date based on the
entered ‘To Date’. Customized Captions can be associated with the
Record Series. Record Series refers to a specialized ‘Grouping’ of records
that all have the same retention schedule. Note: Refer to Chapter 5 –
Maintenance – Record Series for information on setting up Record Series.
Effective Date
This field automatically defaults to the current day's date, but should reflect the date the container was received at the record center. This date can and should be edited if the container is not entered or scanned into inventory on the date it was received. If pro-rata storage is being charged for new containers, this is the date that is used to calculate the pro-rata storage charges.

Retention
If you previously entered a record series, Total Recall will automatically fill in an associated retention code, if the record series was linked to the retention code. After a ‘To Date’ has been entered, the expiration date will automatically calculate and display in the ‘Expiration Date’ field.

A retention code can be entered or selected from the listing of available retention codes. Click on the drop down menu to view all available retention codes, these are codes that were entered into the master or customer service code listings with a category code of ‘8’. The expiration date will be calculated by adding the applicable retention code to the date listed in the ‘To Date’ field for the container. Note: See Chapter 5 – Service Codes – for instructions on setting up retention codes.

From
This field is to indicate the date of the first or earliest item within the Container.

To Date
This field is to indicate the date of the last or latest item within the Container. If a retention code has been entered, a date will need to be entered in this field so that the expiration date can be calculated.

Transport
Enter a transportation charge associated with the adding of the container in this field, if there are any to be associated. Click on down arrow to view a listing of available transportation codes, highlight your selection and double click the mouse to add the transportation charges to the work order line. Note: Depending on the transportation setup (if any) in the customer maintenance screen, this field may be automatically entered. Refer to Chapter 5 – Maintenance – Customers – Minimum Transportation Settings or the Quick Reference Guide titled ‘Automatic Transportation Options’, for information on automating the transportation charges.
Expiration Date

Total Recall can be set to automatically calculate and display the expiration date based on the ‘To Date’ field and the retention code entered. This date cannot be edited unless the system administrator has enabled the editing of expiration dates associated with retention codes on the ‘customer/billing’ screen of the system parameters. If a ‘Retention Code’ and a ‘To Date’ have NOT been entered, the user can enter a valid date in the expiration date field. This date often reflects the customer’s review or destroy date. Note: For information on having the ability to edit an expiration date associated with a retention code see Chapter 10.

View Existing Containers

The view existing containers button allows for the user to access the container inventory inquiry screen. From this screen the user has the ability to search the container inventory. This is often helpful if the user is unsure of how the current inventory has been entered so that what is being entered will be consistent to what is currently in inventory.

Misc. Codes

The user has the option to enter up to three (3) miscellaneous codes for each work order line. These fields are used to charge a customer for miscellaneous services performed in conjunction to adding the container. These services may include repacking charges, barcode charges, or shelving charges. Click on the down arrow key to the right of this field to view the available miscellaneous code choices. Once a code has been entered, a ‘Quantity’ must be entered, if no quantity is entered, Total Recall will automatically assume a quantity of one. Note: If the ‘Dups on Adds’ feature is turned on, this field will duplicate on each work order line unless it is removed after the initial Save. Refer to Chapter 5 – Master/Customer Service Codes for additional information on adding miscellaneous service codes.

If pro-rata storage charges are being assessed as containers are added and the pro rata method is Not ‘Each’, the last miscellaneous code field will display the pro-rata code along with a calculated quantity, this quantity is calculated based on the effective date.

Custom Billing Item

This field allows for the user to enter a customized billing line associated with the adding of the container. This will print on the invoice exactly as indicated in this field. Note: If sales tax or a general ledger number are to be associated with an entry made in the custom billing line, click on the GL button to the right of the quantity field, to display a window allowing for entry of a tax rate and/or a general ledger number. If tax is to be assessed, enter the tax rate as a percent and the tax will automatically be calculated.

The custom billing line will automatically default to the pro-rata charges if the ‘Each’ pro-rata billing option has been selected.
**Reference Fields**

These fields may not display as ‘Reference x’ because the captions for these fields can be customized to reflect the data to be entered into the field. The user has the option to enter up to nine (9) reference values for each container. These fields are indexed and can be used as a cross reference to quickly locate a container. The first three (3) reference fields display in the lower right corner of the work order line screen. To access the additional six (6) reference fields, click the magnifying glass or the <More> button. A screen will display allowing for the user to enter reference fields four through nine, or a quantity of items received for the fungible module. If an additional space is needed for any of the first three reference fields and the <Empty> button displays to the right of the field, click on this <Empty> button and enter the additional information. The caption for the button will change to <Memo> if there is information stored in this field.

Note: Information stored in this field is not searchable.

The reference 1 field is a key indexed reference field and should be used to enter information such as the customers’ box number or another piece of information the customer will use to uniquely identify the container they are adding. When retrieving the container or a file from the container this unique identifier can be used in the quick search field to identify the container.

To make entering data into the reference fields more accurate, the reference field captions can be and should be customized, so that the field label will more accurately state the information to be entered into the field. Note: See Chapter 5 - Maintenance - Customers - Custom Captions, for more information on customizing the reference field captions.

**Print Label**

The letter “Y” flags the container record to print a label; the letter “N” indicates that a label is not necessary for this container.

**Dynamic Allocation** – If containers are added to Total Recall prior to the containers being scanned, the labels are printed from the work order input screen by clicking the <Labels> button, they are then placed on the container and the containers are scanned to a shelf location.

**Fixed Location Storage** – If labels are being placed on the new containers, the labels can be printed from the Work Order <Labels> button.
Note: Labels for either allocation can also be printed from the Operational Reports Menu – Container Labels for Open Work Orders. This option allows the user to print container labels for a range of open work orders.

To have this option automatically engaged to display a ‘Y’, check the box ‘Perpetually Engage Print Labels’ in the System Menu – Parameters – Work Order/Space Allocation screen – Work Order Parameters.

**Filing Required** Check this box if the customer is requiring that the contents of the container be itemized indexed. This will just serve as a reminder to index the container.

**More** Click on the <More> button and a screen will display allowing the user to enter reference fields four through nine or a quantity of items received for the fungible module. These fields can also be accessed by clicking on the magnifying glass 🕵️‍♀️.
Rapid Container Add Screen

This screen is for **Dynamic Allocation** only.

In addition to the standard container add screen, the user has the option to use the rapid container add screen. To access this screen the user can click the lightning bolt button to the right of the `<Add Container>` button. This screen, with a minimal amount of one time setup in the customer maintenance screen, allows the user to rapidly add containers to Total Recall. **Note:** The ‘**Dups on Adds**’ feature must be turned on for this screen to work properly.

The steps below walk the user through the setup of the speed container add screen.

1. Total Recall allows custom captions to be pulled on a system-wide basis; or by the customer; department; item type or by record series. Indicate on the Maintenance screen – Customers – Default ‘tab’ which custom captions are to be pulled for container and/or indexed item level entry. **Note:** Both the container and indexed item captions must pull from the same caption criteria. To select, click in the box to the right of the ‘**Custom Captions to be utilized on the Rapid Input screens**’.

2. Depending on which custom captions are selected in the above step, the captions must be customized to match the data to be entered in the reference fields. The table below will indicate which screen to set the captions. **Note:** The container captions are those in the columns on the left hand side of the screen. Reference fields not being used should be cleared out.

<table>
<thead>
<tr>
<th>CRITERIA</th>
<th>SCREEN</th>
</tr>
</thead>
<tbody>
<tr>
<td>System</td>
<td>System Menu – Parameters – Custom Captions ‘Tab’</td>
</tr>
<tr>
<td>Customer</td>
<td>Maintenance Menu – Customers – Individual Customer Records – Custom Captions ‘Tab’</td>
</tr>
<tr>
<td>Department</td>
<td>Maintenance Menu – Customers – Individual Customer Records – Departments ‘Tab’ – Add or View Dept button – Captions ‘Tab’</td>
</tr>
<tr>
<td>Type</td>
<td>Maintenance Menu – Item Types – Captions ‘Tab’</td>
</tr>
<tr>
<td>Record Series</td>
<td>Maintenance Menu – Record Series – Captions ‘Tab’</td>
</tr>
</tbody>
</table>
3. From the captions screen, the user will enter a field caption (up to 15 characters) on the left portion of the screen under the heading ‘Container Reference Field Captions’ corresponding to each reference field to be entered when containers are added. An abbreviated caption (up to 5 characters) is to be entered into the specified field to the right. Any reference field where data will not be entered should be cleared out. If the description field is not to be entered, clear this caption also. Data entered on this screen will determine how the input screen will display.

From the work order input screen, to add a container using the rapid container add screen, the user will click on the lightning bolt button to the right of the <Add Container> button. A customized screen will display depending upon the custom caption setup in the previous steps. Fig 3.5a and 3.5b show two samples of an ‘Add Container’ customized screen.

![Add Container Screens](image)

Fig 3.5.a Fig 3.5.b

In the sample to the left above, reference field captions pull from the department, item type or the record series. The data entry fields will not display until the department, item type or record series is selected. In the sample to the right above the custom captions are pulling from the customer level, therefore; the reference field captions display immediately when the screen is accessed.

Complete the necessary fields in the upper portion of the screen. These fields are detailed in the table on the next page. If the Total Recall container number is to be entered manually with each add, check the <DE> checkbox to the right of the T.R. Con # field. This will then automatically include this field in the ‘loop’ of fields for data entry. To begin entry, click in the ‘T.R. Con #’ field if this field is to be entered, otherwise click in the first reference field to be data entered, enter the appropriate data and press the [ENTER] key. The cursor will move to the next field. Continue entering data and pressing the [ENTER] key after each entry until the last entry field has been entered. Press the [ENTER] key twice when the last field has been entered. The first time will take the user to the <Save> button and the second time will Save the record and return the user to the first data entry field.
After the initial save, the user will be returned to the first data entry field. It will be highlighted waiting on user’s input. The user can simply enter the new information for the next container. If any field repeats the data as the previous record, simply press the [ENTER] key through that field. The table below details the fields in the upper portion of the rapid container add screen.

**T.R. Con #** The user has the option to enter the unique Total Recall container number (the unique barcode tracking number) from the barcode label. If this number will be keyed in for each container added, see the next field description on the `<DE>` checkbox. If a Total Recall container number is not entered into this field, Total Recall will automatically assign a Total Recall container number when the line is saved. The labels are then printed and affixed to the container after the work order is completed.

**DE** If the Total Recall container number is to be data entered, this box should be checked. This field can be set to be perpetually engaged through the system parameters screen, Work Order/Space Allocation tab – Work Order Parameters. This will then include the Total Recall container number into the data entry focus fields. As each record is saved the focus will be set to the Total Recall container number field. The user will enter the unique T.R. container number, press the [ENTER] button and be taken directly to the next data entry field. With each new record added a unique T.R. container number would need to be entered.

**Setup Code** This field refers to the initial input of a container, and the charges associated with this one time service. Click on the down arrow key to the right of this field to view the available setup code choices. The choices that appear here are those that were set up as a category code ‘3’ on the master service code or customer service code screens during setup. To select a code, the user may simply begin entering a valid setup code. This field is a ‘Walk-a-long’ field and will display the closest match. When the choice is displayed press the [ENTER] key. The user also may click on the drop down arrow, highlight the setup code and double click with the mouse.
**Store Code**  This field refers to the storage code associated with the recurring monthly storage charge for the container being added. The choices that appear here are those that were set up as a category code ‘4’ on the master or customer service code screens. Click on the down arrow to the right of the store code field to view the listing of available monthly storage codes. From the drop down menu, the user can highlight a storage code and double click with the mouse or simply type the storage code in the storage code field. 

*Note: For customers that are being charged storage by the cubic foot, no charge is associated with this storage code but a cubic size should be associated. Refer to Chapter 5 - Maintenance Menu - Master Service Codes or Customer Service Codes to add additional monthly storage codes to the master or customer service code listings.*

**Cubic Feet**  This field defaults to the cubic footage associated with the monthly storage code selected if the cubic feet have been associated with the storage code entered. This field can be edited as needed. If storage is being charged by the container, this field can be used to calculate total cubic footage per customer and for the entire record center. If the container being entered is a miscellaneous size container, enter the actual cubic size of the container in this field.

**Location**  Total Recall will allow for this location field to be left blank. This will allow for the location to be scanned using a handheld bar code scanner. The container will be listed in Inventory with a blank location until the containers have been scanned relocating them to their shelf locations. The user also has the option to enter a staging location to designate where the container is being held, or a shelf location if the container has been placed on a shelf location.

**Dept**  This field is for the user to enter the owner department for the container. If the customer account has been set up to require a department to be entered, the screen cannot be saved without selecting a department from the listing. Select the owner department to be associated with the container listing in inventory. The department field is a ‘walk along’ field, so as letters are entered into the field, the closest match will display. As the correct department displays, simply press the [ENTER] key on the keyboard to accept the current selection. To see a listing of available departments, click the down arrow to the right of the ‘Dept’ field. Viewing the department listing, using the mouse or arrow keys on the keyboard, the user can highlight the selection and either use the mouse to double click or press the [ENTER] key to accept the selected department.
Rec. Ser  A record series is many times associated with a retention code, which will automatically calculate a container’s expiration date based on the entered ‘To Date’. Customized captions can be associated with the record series. Record series refers to a specialized grouping of records that all have the same retention schedule. Note: Refer to Chapter 5 – Maintenance – Record Series for information on setting up record series.

Misc. Code  To add a miscellaneous code associated with the adding the container to inventory, select the code from the ‘Misc. Code’ drop down option. Refer to Chapter 5 - Master or Customer Service Codes for additional information on adding miscellaneous service codes.

Item Type  The item types field allows the user to set up ‘Types’ of items being stored and assign this ‘Type’ with each record in inventory. Note: If the web server module is in use, item types must be set up to pull customized captions throughout the web server screens. Typically the item types used are ‘BOX’ to identify a container and ‘FILE’ to identify a file regardless of whether the file is stored in a container or on a shelf.

If record series are being used, the item type can be associated with the record series and will automatically display on the ‘Add’ screens when the record series is selected. Note: See Chapter 5 to set up item types.

Effective Date  This field automatically defaults to the current days date, but should reflect the date the container was received at the record center. This date can and should be edited if the container is not entered or scanned into inventory on the date it was received. If pro-rata storage is being charged for new containers, this is the date that is used to calculate the pro-rata storage charges.

Expiration Date  Total Recall can be set to automatically calculate and display the expiration date based on the ‘To Date’ field and the retention code entered. This date cannot be edited, unless the system administrator has enabled the editing of expiration dates associated with retention codes on the ‘Customer/Billing’ screen of the system parameters. If a ‘Retention Code’ and a ‘To Date’ have NOT been entered, the user can enter a valid date in the expiration date field. This date often reflects the customer’s review or destruction date. Note: For information on having the ability to edit an expiration date associated with a retention code see Chapter 10.

Quantity  This field is for entry of the quantity of items being added with the container for the fungible module. Note: Refer to the section on the fungible module later in this chapter for more information on this feature.
Add File  This function indexes items within a container. A user can index a container that was previously added to inventory or index a container on the same work order where the container is added. Normally the containers are added to the system and indexed on a later work order. This initiates the billing of the container and locates the container in case of a customer request. The items are then indexed on a later work order. Labels can be printed for each File as it is indexed, but usually a label is not printed until the item is requested.

An entire container can be indexed, or items can be indexed as they are retrieved. Total Recall allows for several ways to add an indexed item to a container. Depending on the fields to be indexed and the manner in which they are indexed will determine which method will best suit your needs.

- Standard Indexed Item Add screen
- Rapid Indexed Item Add screen
- Adding an Indexed Item as it is Retrieved (see – ‘Retrieve Non-Indexed Item’ later in this chapter)
Standard Indexed Item Add Screen

From this screen the user can ‘Add’ an indexed item to inventory. This screen also allows a user to temporarily retrieve or permanently remove the item being added. Fig 3.6 shows the input screen that is displayed when the <Add File> button is selected from the work order input screen.

‘Add File’ Screen

The following pages detail the fields contained on this screen.

Setup Code

This field refers to the initial index of a file or item, and the charges associated with this service. Click on the down arrow key to the right of this field to view the available setup code choices. The choices that appear here are those that were set up as a category code of ‘D’ on the master or customer service code screens during setup. The user can highlight and then double click the setup code selection from the drop down menu or begin entering in the selection using the ‘Walk-a-long’ feature. Note: Refer to Chapter 5 - Maintenance Menu - Master or Customer Service Codes’ to add additional setup codes. Any charges that may be associated with this code apply to the actual setup charge of indexing the item or file. Note: Indexing is usually charged by the individual item indexed or by the hour. If the charge is by the item, this cost per item is associated with this setup code. If the charge is by the hour, the setup charge should have a zero dollar amount and the hourly charge will need to be assessed on a separate work order line.
**No Find**

This check box allows for a user to return to a work order line and indicate that the non-indexed item was ‘Not Found’ within the container indicated. Depending on work order parameter settings, when this check box is selected, the program may or may not prompt the user to change the setup code and delete the retrieval code. If no prompt displays or if you answer ‘Yes’ to the prompt, the activity code is changed to the default ‘No Find File’ code set up in the system parameters and the retrieval code is deleted. Total Recall will then prompt the user to clear any transportation codes entered on the line. *Note: The user can also ‘No Find’ an indexed item on the work order input screen by using the right mouse button and clicking on the letter ‘F’ in the NF column on this screen on the line displaying the item that was not located in the specified container. ‘NF’ is an abbreviation for ‘Not Found’. The letter ‘F’ (for False) will change to ‘T’ (for True) and this ‘No Find’ checkbox will be automatically checked.*

**Store Code**

This field refers to the recurring monthly storage charge for an indexed item. The choices that appear here are those that were set up as a category code ‘4’ on the master or customer service code screens. *Note: The choices here list all storage codes whether they refer to an indexed item or a container.* Click on the down arrow to the right of the store code field to view the listing of available monthly storage codes. The user can highlight a storage code and double click with the mouse or use the ‘walk-a-long’ feature to select the storage code. *Note: If no fees for file storage are to be charged, a file storage code can be applied that has no price or the code can be left blank. If left blank, upon save, the user will receive a prompt stating that the storage code is blank and do they wish to continue.*

**Location**

**Fixed Location Storage** – This field refers to the location of the container in which the item to be indexed is stored. The user can enter the unique container location in this field, or the unique Total Recall container number can be entered in the appropriate field and the Location will display. If neither is known, the user can click on the binoculars between these two fields and the container inventory screen is displayed. The user can then use the search features on this screen to locate the container. When the container is found and highlighted, the user will need to click on the <Select> button on the tool bar and the container information will be transferred to the work order screen.
**Dynamic Allocation** – Dynamic allocation tracks by the unique Total Recall container number and not the location. When the container is identified the containers’ current Location displays in this field. If the Total Recall container number is not known, the user can click on the binoculars between the location and Total Recall container number fields. The container inventory screen will display, then the user can then use the search features on this screen to locate the container in which the item(s) to be indexed are stored. When the container is selected, the user will need to click on the <Select> button on the tool bar and the container information will be transferred to the ‘Input New File/Item Stored in a Container’ screen.

**T.R. Con # Fixed Location Storage** – Prior to adding a file, the user must first identify the container where the file is located. Total Recall fixed location storage tracks containers by their unique location identifier. When a container location is entered, the Total Recall container number will display. If the user knows the unique Total Recall container number, this can be entered in lieu of the unique location and the location will then display. By clicking on the binoculars, the user will be taken to the container inventory screen where the search buttons can be used to locate the container. Once the container has been located and highlighted, clicking the <Select> button will transfer the information to the file input screen.

**Dynamic Allocation** – Enter the unique Total Recall container number for which the file or indexed item is located. If the Total Recall container number is not known, the user can click on the binoculars to search the container inventory. When the container is located and highlighted, the user simply clicks on the <Select> button to return to the file input screen and transfer the container information to this screen. If the account has been cross referenced with customer box numbers in the reference 1 field, the user has the option to enter the customer box number in the reference 1 special search field in the lower left corner of the screen and the associated Total Recall container number will display in this field.

**Item ID Fixed Location Storage** – The user must enter a unique file or item identification. This unique number can be the Total Recall item number. If the T.R. item number is used, the field will automatically fill. If the T.R. item number is not used, a unique to the container item identifier must be entered into this field. This item ID will then track the item within the container, throughout Total Recall. *Note: See Chapter 10 - System Parameters – Work Order/Space Allocation – Work Order Parameters to have this field default to the Total Recall item number.*
**Dynamic Allocation** - This field may be used as an additional indexed field to identify the indexed item. If Total Recall has been setup to identify indexed items by the work order line number or to sequentially number indexed items within a box, this line or sequence number will be entered into this field. *Note: See Chapter 10 - System Parameters – Work Order/Space Allocation – Work Order Parameters for information on identifying indexed items by line numbers or sequentially numbering indexed items.*

**T.R. Item # Fixed Location Storage** – This is a unique sequential number assigned to each indexed item as it is saved. This number can be entered manually. Since the indexed item is tracked by the item ID in fixed allocation, this field is usually left blank for the system to automatically assign.

**Dynamic Allocation** – This number is used to track the indexed items within the containers in Total Recall. This number can be manually entered but must be unique within Total Recall not just within the container.

**Dept** If the container that stores the indexed item has a department associated with it, that department will carry over to the indexed item and display in this field. If the container is not assigned to a department, but services are to be assessed to a department, the department can be entered into this field. The department field is a ‘walk-a-long’ field, for easy selection.

**Description** The caption on this field is customizable and may or may not display as ‘Description’. This field is used to describe the indexed item. If it is necessary to enter a more lengthy description, click on the `<Empty>` button to the right of this field, and enter additional information. Upon saving this additional information, the caption for the `<Empty>` button will change to `<Memo>`, indicating that data has been entered and saved. *Note: It is recommended to keep descriptions brief and avoid using the memo field, this will allow for quicker, more efficient searches.*

**Record Series** This field will automatically display the record series associated with the owner container, if one was entered for the container.
Type   The item type allows the user to set up ‘Types’ of items being stored and assign this ‘Type’ with each record in inventory.  Note: If the web server module is in use, item types must be set up to pull customized captions throughout the web server screens. Typically the item types used are ‘BOX’ to identify a container and ‘FILE’ to identify a file or indexed item regardless of whether the file is stored in a container or on a shelf.

If record series are being used, the item type can be associated with the record series and will automatically display on the ‘Add’ screens when the record series is selected.  Note: See Chapter 5 to set up item types.

Retention   This field may or may not be editable.  In the system menu – Parameters – Company/Billing screen, if the field ‘Copy Container Retention Info to Indexed Items’ has been checked, any retention code entered for the selected container will automatically copy to this ‘Retention’ field.  If the retention information was left blank for the container, it will remain blank for the indexed item.  This field is not editable.

This field is editable if this parameter setting is not selected.  Click on the drop down menu to view all available retention codes, these are codes that were entered into the master or customer service code listings with a category code of ‘8’.  If a retention code is entered, the expiration date will be calculated by adding the applicable retention code period to the date listed in the ‘To Date’ field for the indexed item.  Note: Refer to Chapter 10 – System – Parameters – Company/Billing ‘Tab’ for more information on setting this feature on or off.

Transport   This field is for entering a transportation charge associated with the indexing of the item if it is to be retrieved.  This is a ‘walk-a-long’ field for easy entry of an available transportation code.  Note: Depending on the transportation setup (if any) in the customer maintenance screen, this field may be automatically entered.  Refer to Chapter 5 – Maintenance – Customers – Minimum Transportation Settings or the Quick Reference Guide titled ‘Automatic Transportation Options’, for information on automating the transportation charges.

Effective Date   This field automatically defaults to the current days date, but should reflect the date the item was indexed at the record center.  This date can be edited if necessary.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| **From Date** | This field may or may not be editable. In the System Menu – Parameters – Company/Billing screen, if the field ‘Copy Container Retention Info to Indexed Items’ has been checked, the ‘From Date’ entered for the selected container will automatically copy to this ‘From Date’ field. If this information was left blank for the container, it will remain blank for the indexed item. This field is not editable.  
This field is editable if this parameter setting is not checked. Enter a valid date in this field to reflect the ‘From Date’ of the indexed item.  
*Note: Refer to Chapter 10 – System – Parameters – Company/Billing ‘Tab’ for more information on setting this feature on or off.* |
| **To Date** | This field may or may not be editable. In the System Menu – Parameters – Company/Billing screen, if the field ‘Copy Container Retention Info to Indexed Items’ has been checked, the ‘To Date’ entered for the selected container will automatically copy to this ‘To Date’ field. If this information was left blank for the container, it will remain blank for the indexed item. This field is not editable.  
This field is editable if this parameter setting is not checked. Enter a valid date in this field to reflect the ‘To Date’ of the indexed item. If a retention code has been entered, once the ‘To Date’ is entered, the expiration date will be calculated and displayed.  
*Note: Refer to Chapter 10 – System – Parameters – Company/Billing ‘Tab’ for more information on setting this feature on or off.* |
| **Expiration Date** | This field may or may not be editable. In the System Menu – Parameters – Company/Billing screen, if the field ‘Copy Container Retention Info to Indexed Items’ has been checked, the ‘Expiration Date’ entered for the selected container will automatically copy to this ‘Expiration Date’ field. If this information was left blank for the container, it will remain blank for the indexed item. This field is not editable.  
This field is editable if this parameter setting is not checked. Enter a valid date in this field to reflect the ‘Expiration Date’ of the indexed item. This field can be calculated automatically if a ‘Retention’ code and ‘To Date’ is entered for the indexed item.  
*Note: Refer to Chapter 10 – System – Parameters – Company/Billing ‘Tab’ for more information on setting this feature on or off.* |
| **Current Location** | This field allows for the user to enter an alternate location if the indexed item is currently residing in a temporary location other than the owner container location. |
Filing Required

This checkbox acts as a reminder if the customer is requiring all items within the container to be indexed.

Misc. Codes

You can enter up to three (3) miscellaneous codes for each work order line. These fields are used to charge a customer for miscellaneous services performed in conjunction with indexing the file. For example, if an item is requested to be copied and faxed before it is sent to the customer, miscellaneous charges can be added to this screen. This field is a ‘walk-a-long’ field for easy entry. The codes displayed here are those with a category of ‘5’ transportation codes, to allow for multiple transportation charges to be entered; and category ‘9’ miscellaneous codes. Once a code has been entered, a ‘Quantity’ must be entered, or Total Recall will automatically assume a quantity of 1. Refer to Chapter 5 - Master or Customer Service Codes for additional information on adding miscellaneous service codes.

Reference Fields

These fields may not display as ‘Reference x’ because the captions for these fields can be customized to reflect the data to be entered into the field. The user has the option to enter up to nine (9) reference values for each indexed item. These fields are indexed and can be used as a cross reference to quickly locate an item. The first three (3) reference fields display in the lower right corner of the work order line screen. To access the additional six (6) reference fields, click the magnifying glass or the <More> button. A screen will display allowing for the user to enter reference fields four through nine, or a quantity of items received for the fungible module. If additional space is needed for any of the first three reference fields and the <Empty> button displays to the right of the field, click on this <Empty> button and enter the additional information. The caption for the button will change to <Memo> if there is information stored in this field. Note: Information stored in this field is not searchable.

The reference 1 field is a ‘Key’ indexed reference field and should be used to enter a ‘Key’ piece of information that will identify the indexed item such as a file number, medical reference number, an account number, or a name. When retrieving the item this unique identifier can be used in the quick search field to identify the item quickly. To make entering data into the reference fields more accurate, the reference field captions can be and should be customized, so that the field label will more accurately state the information to be entered into the field. Note: See Chapter 5 - Maintenance - Customers - Custom Captions, for more information on customizing the reference field captions.
Print Label  A ‘Y’ or an ‘N’ are the only two valid responses for this field. Entering a ‘Y’ in this field will flag the record to print a label for this file. The file labels are printed from the work order input screen, <Labels> button. The lines flagged with a ‘Y’ will print a file label. Note: From the System Menu – Parameters – Work Order/Space Allocation – Work Order Parameters, this flag can be set to always display a ‘Y’ in this field.

Ref 1 Special Search  This field allows the user to quickly identify the container storing the indexed item by entering the unique reference 1 field for the container (often times the customer box number). If this field is entered and a match is found, the associated Total Recall container number will automatically display in the ’T.R. Con #’ field.

NOTE: If the File is being indexed to be Temporarily Retrieved or Permanently Removed, this screen can both Index and Retrieve or Remove the Item. The following fields located in the upper right hand corner of the screen will need to be completed to Retrieve or Remove the Item as it is Indexed.

Retrieve File  Check this box to temporarily retrieve the item as it is being indexed.

Remove Item  Check this box to permanently remove the item as it is being indexed.

By  Enter the name of the person retrieving or removing the indexed item. If a requestor name was entered in the work order header, this name will display once a retrieval code or removal code has been entered. This name can be changed to reflect the recipient of the indexed item or the person authorizing the removal of the indexed item. This is a ‘Walk-a-long’ field for easy entry. If security has been engaged for the selected customer, an authorized person must be entered into this field, prior to the screen being saved.

Remove Date  This field is for the retrieval or removal date, it will automatically default to the current day’s date but can be edited. If the system parameters have been set to ‘Make item out dates equal to WO close date’ this date will automatically be updated to the work order close date at the time the work order is closed.

Phone  This field is for the phone number of the person whom is requesting this indexed item to be retrieved or removed. This information for item retrievals, if entered, stays with the record in inventory until the item is returned.
**Due Date**  This field is used to enter the date the indexed item is due back to the record center. This field can be set to automatically enter a ‘Due Date’ if a retrieval code has been associated with a specified number of ‘Default Days’. The due date is calculated by adding the default days to the current days date.

**Retrieval Code**  This field is a ‘walk-a-long’ field for easy entry of a valid retrieval or removal code. Click on the down arrow to the right of this field to view and/or select a retrieval or removal code.
Rapid Indexed Item Add Screen

In addition to the standard indexed item add screen, the user has the option to use the rapid indexing screen dependent upon which fields will be entered. To access this screen the user will click the lightning bolt button to the right of the <Add File> button. This screen, with a minimal amount of one time setup in the customer maintenance screen, allows the user to rapidly add indexed items to containers in Total Recall. The steps below walk the user through the setup of the speed indexing screen. Note: The ‘Dups on Adds’ feature must be turned on for this screen to work properly. The steps below walk the user through the setup of the speed indexed item add screen.

1. Total Recall allows custom captions to be pulled on a system-wide basis; or by the customer; department; item type or by record series. Indicate on the maintenance screen – customers – default ‘tab’ which custom captions to be pulled for container and/or indexed item level entry. Note: Both the container and indexed item captions must pull from the same captions set. To Select, click in the box to the right of the selection for the field: ‘Custom Captions to be utilized on the Rapid Input screens’.

2. Depending on which custom captions are selected in the above step, the captions must be customized to match the data to be entered. The table below will indicate which screen to set the captions. Note: The indexed Item Captions are those in the columns on the right hand side of the screen.

<table>
<thead>
<tr>
<th>CRITERIA</th>
<th>SCREEN</th>
</tr>
</thead>
<tbody>
<tr>
<td>System</td>
<td>System Menu – Parameters – Custom Captions ‘Tab’</td>
</tr>
<tr>
<td>Customer</td>
<td>Maintenance Menu – Customers – Individual Customer Records – Custom Captions ‘Tab’</td>
</tr>
<tr>
<td>Department</td>
<td>Maintenance Menu – Customers – Individual Customer Records – Departments ‘Tab’ – Add or View Dept button – Captions ‘Tab’</td>
</tr>
<tr>
<td>Type</td>
<td>Maintenance Menu – Item Types – Captions ‘Tab’</td>
</tr>
<tr>
<td>Record</td>
<td>Maintenance Menu – Record Series – Captions ‘Tab’</td>
</tr>
<tr>
<td>Series</td>
<td>Maintenance Menu – Record Series – Captions ‘Tab’</td>
</tr>
</tbody>
</table>
3. From the captions screen, the user will enter a field caption (up to 15 characters) on the right portion of the screen under the heading ‘Indexed Items Reference Field Captions’ corresponding to each reference field to be entered when items are added. An abbreviated caption (up to 5 characters) is to be entered into the specified field to the right of the field caption. Any reference field where data will not be entered should be empty, including the description field if a description is not to be entered. Data entered on this screen will determine how the input screen will display.

From the work order input screen, to add an indexed item using the rapid indexing screen, the user will click on the lightning bolt button to the right of the <Add File> button. A customized screen will display depending upon the custom caption setup in the previous steps. Fig 3.7a and 3.7b below shows two samples of what an ‘Input New File/Item Stored in a Container’ customized screen may look like.

In the sample to the left above, reference field captions pull from the department, item type or the record series. If captions are to pull from the department or record series, once a container has been selected the department or record series and the captions will display. Item type caption do not display in the data entry fields until the item type is selected. In the sample to the right above the custom captions are pulling from the customer level, therefore the reference field captions display immediately when the screen has been accessed.

Complete the necessary fields in the upper portion of the screen. These fields are detailed on the following pages. If the data in any of these fields will change between records, check the small box to the right of the field(s) and this field(s) will be included in the ‘Loop’ as each record is saved.

Indicate the container to be itemized indexed, in one of the following ways:

- Enter the data contained in the reference 1 field for the container in inventory into the ‘Ref 1 Special Search’ field.
• Enter the Total Recall container number (the barcode number) into the ‘**T.R. Con #**’ field.

• Click the binoculars to search the container inventory and select the container.

• Enter the unique location (**Fixed Allocation** only)

With the mouse, click in the first field to be data entered. Enter the pertinent data for the specified field, press the [ENTER] button, if additional fields are to be entered, the focus will be set to the next field for entry. After each entry press the [ENTER] button and the focus will be set to the next field, continue until the last entry field has been entered. Press [ENTER] twice when the last field has been entered, the first time will take the user to the <**Save**> button the second time will save the record.

After the initial **Save**, the user will be returned to the first data entry field, it will be highlighted waiting on user input, the user will simply enter the new information for the next item. If any field repeats the data as the previous record, simply press the [ENTER] key through that field. The table below details the fields in the upper portion of the rapid indexed item Add screen. The table on the following pages details the fields in the upper portion of the rapid indexing screen.

<table>
<thead>
<tr>
<th>Ref 1</th>
<th>To select the container to be indexed by the container’s reference 1 field (typically the customer’s box number), enter the data that is contained in this field for the container as listed in inventory. <strong>Note:</strong> This field must contain unique data to select the container.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Special</td>
<td></td>
</tr>
<tr>
<td>Search</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>T.R. Con #</strong></th>
<th>To select the container to be indexed by the unique container’s Total Recall barcode number, enter this number into the ‘<strong>T.R. Con #</strong>’ field.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Location</strong></th>
<th><strong>Fixed Location Storage</strong> – To select the container by the unique location, enter the location into the ‘<strong>Location</strong>’ field, and the corresponding Total Recall container number will display in the ‘<strong>T.R. Con #</strong>’ field.</th>
</tr>
</thead>
</table>

| **Dynamic Allocation** | After the container to be indexed has been selected, if a location exists in inventory for that container, it will display in this field. A blank location will display with just the segment dashes. |
**Setup Code**  This field refers to the initial indexing of an item and the charges associated with this one time charge. Click on the down arrow key to the right of this field to view the available setup code choices. The choices that appear here are those that were set up as a category code ‘D’ on the master service code or customer service code screens during setup. This field is a ‘Walk-a-long’ field for easy entry of a valid code. The code can also be selected from the listing of valid codes by highlighting and selecting the code. Note: Refer to Chapter 5 - Maintenance Menu – Master or Customer Service Codes to add additional setup codes to your master or customer service codes listings.

Note: If indexing of items is done by the hour the setup code should NOT have a charge associated with it. The hours will need to be logged manually and entered into either this or another work order for billing.

**DE**  If the Total Recall item number is to be data entered, this box should be checked. This field can be set to be perpetually engaged through the system parameters screen, work order/space allocation tab – work order parameters. This will then include the Total Recall container number into the data entry focus fields. As each record is saved the focus will be set to the Total Recall item number field. The user will enter the unique T.R. item number, press the [ENTER] button and be taken directly to the next data entry field. With each new record added a unique T.R. item number would need to be entered for each item added. Note: See Chapter 10 for more information on perpetually engaging this feature.

**Store Code**  This field refers to the storage code associated with the recurring monthly storage charge for the indexed item. The choices that appear here are those that were set up as a category code ‘4’ on the master or customer service code screens. Click on the down arrow to the right of the store code field to view the listing of available monthly storage codes. From the drop down menu, the user can highlight a storage code and double click with the mouse or simply type the storage code in the storage code field. Note: This is a monthly recurring charge that will be charged along with the monthly recurring storage charge for the container, the code entered here, may or may not have a charge associated.
Misc. Code  You can enter one (1) miscellaneous code for each work order line. This field may be used to charge a customer for miscellaneous services performed in conjunction with indexing the file. This field is a ‘Walk-a-long’ field for easy entry. This screen does not allow for entry of a ‘Quantity’, the quantity is assumed as one (1). To enter additional miscellaneous charges, use the ‘Other’ billing line. Refer to Chapter 5 - Master or Customer Service Codes for additional information on adding miscellaneous service codes.

Rec Ser  If a record series has been assigned to the container being indexed, the record series will display in this field. If the captions are attached to the record series they will display once the record series has been selected.

Dept  This field will automatically display the department associated with the container selected from inventory, if a department is associated with the record.

Item Type  The item type allows the user to set up ‘Types’ of items being stored and assign this ‘Type’ with each record in inventory. Note: If the web server module is in use, item types must be set up to pull customized captions throughout the web server screens. Typically the item types used are ‘BOX’ to identify a container and ‘FILE’ to identify a file or indexed item regardless of whether the file is stored in a container or on a shelf.

If record series are being used, the item type can be associated with the record series and will automatically display on the ‘Add’ screens when the record series is selected. Note: See Chapter 5 to set up item types.

Effective Date  This field automatically defaults to the current day’s date, but should reflect the date the item was indexed at the record center. This date can be edited if necessary.

From Date  This field may or may not be editable. In the system menu – parameters – company/billing screen, if the field ‘Copy Container Retention Info to Indexed Items’ has been checked, the ‘From Date’ entered for the selected container will automatically copy to this ‘From Date’ field. If this information was left blank for the container, it will remain blank for the indexed item. This field is not editable.

This field is editable if this parameter setting is not checked. Enter a valid date in this field to reflect the ‘From Date’ of the indexed item.

Note: Refer to Chapter 10 – System – Parameters – Company/Billing ‘Tab’ for more information on setting this feature on or off.
To Date  This field may or may not be editable. In the system menu – parameters – company/billing screen, if the field ‘Copy Container Retention Info to Indexed Items’ has been checked, the ‘To Date’ entered for the selected container will automatically copy to this ‘To Date’ field. If this information was left blank for the container, it will remain blank for the indexed item. This field is not editable.

This field is editable if this parameter setting is not checked. Enter a valid date in this field to reflect the ‘To Date’ of the indexed item. If a retention code has been entered, once the ‘To Date’ is entered, the expiration date will be calculated and displayed.

Note: Refer to Chapter 10 – System – Parameters – Company/Billing ‘Tab’ for more information on setting this feature on or off.

Quantity  This field allows for a quantity for the specified item to be entered indicating the number of items received for the fungible module. Note: Refer to the section on the fungible module later in this chapter.

# Of Indexed Items in Container  This number reflects the number of items currently indexed within the selected container. This number updates as each indexed item added to the container is saved.

Print Label  A ‘Y’ or an ‘N’ are the only two valid responses for this field. Entering a ‘Y’ in this field will flag the record to print a label for this item. The item labels are printed from the work order input screen, <Labels> button. The lines flagged with a ‘Y’ will print a file label. Note: From the System Menu – Parameters – Work Order/Space Allocation – Work Order Parameters, this flag can be set to always display a ‘Y’ in this field.

Retrieve Container  This function is used to temporarily retrieve a container in inventory. When a container is retrieved, the record remains in Total Recall and storage continues to be charged.

Fixed Allocation – When a container is temporarily retrieved from inventory under fixed allocation, because the container is tracked by the location, the location address is maintained in the database tables, and the container will be re-shelved to the same location when it is returned to the record center, therefore the space remains open until the container is returned to inventory.
**Dynamic Allocation** – When a container is temporarily retrieved under dynamic allocation, the container is tracked by the Total Recall container number. The location becomes available for another container. When the container is returned, it can be scanned to a new location or if available to its previous location. The parameters screen has a setting to select whether or not the location is to remain in the database while a container retrieved. The location is release and available for another box regardless of this selection. *Note: See Chapter 10 – System – Parameters – Work Order/Space Allocation – Automatic Allocation Parameters.*

Fig 3.8 shows the input window that is displayed when the **Retrieve Container** button is selected form the work order input screen. The table immediately following the screen will detail the fields displayed on the input screen.

**Retrieve Container Window**

**Line #**
This field displays the number of the current line displayed on the screen. This number is incremented every time a **Save** is engaged. The number of saved lines on the current work order is one less than what is displayed in the **Line #** field.

**Search Options**
Allows a search of containers by either TR Barcode # or by the Reference 1 field. Enabling the “By Dept” check box will sort the results by client department.
**Note:** Many times this field displays a customized caption instead of ‘Reference 1’. These fields allow a user to quickly locate a container if the information contained in either field is known and this information is unique for the customer. First, enter any additional charges and contact information and then enter the TR Barcode # or Ref. 1 data in the appropriate field. Total Recall™ will search the field for the container. If the container is located in inventory, the record will display on the screen and a window will display prompting the user: ‘Do you wish to save this record?’ to save the record and add the line to the work order. If the data entered into this field exactly matches more than one record, the following message prompt will display: ‘More than one match was found for the specified criteria xxxxxxx... Do you wish to view the matches now?’ Click <Yes> to view, then select the appropriate container.

**View List** Displays the list of containers in Total Recall™ inventory. Containers currently checked out are highlighted in red. Select an item from the list, then right-click to see a menu of available commands.

<table>
<thead>
<tr>
<th>Removals</th>
<th>Make Work Order</th>
<th>Select Item</th>
<th>Edit Item</th>
<th>File Relocation History by Box</th>
</tr>
</thead>
</table>

**Query** This feature allows a user to build a query and view the result set. This result set or selected records from the result set can then be exported back to the work order lines. Refer to Chapter 1 - Introduction - Query Builder or the Quick Reference Guide on queries, for more information on this feature.

**Location Fixed Allocation** – Enter the unique location for the container to be retrieved in this field. Total Recall will then display the Total Recall container number associated with this location. Click <View List> button to search the container inventory for the container to be retrieved. From the container inventory screen the <Select> button can be clicked and the container information will be transferred to the retrieval input screen.

**Dynamic Allocation** – Identify the container to be retrieved by either entering the unique T.R. container number, the unique reference 1 field information or by searching the container inventory by clicking the <View List> button and selecting the container to be retrieved by highlighting the record and clicking on the <Select> button to transfer the information to the input screen.

Once the container has been selected, this field will automatically populate with the location where the container is currently stored.
After a container has been identified, the container history button to the right of the ‘T.R. Con #’ field will display a print report screen with the selected container number displayed for the user to quickly view the history of the container. This report can be displayed on the screen or can be printed.

Enter in this field the department identifier of the department to be charged for this container retrieval. This is a walk-a-long field for easy entry of the charge to department. To view a complete listing of the available departments, click on the down arrow button to the right of the field.

If the reference 1 special search by department is being used, the owner department must be listed here in order for the program to search by the reference 1 value and the department.

Note: If this field is left blank and the container is selected, the field will be populated with the container’s owner department, if one exists.

If the ‘Requested By’ field was entered in the work order header, that name will automatically display in this field. If the person who is to receive the container is other than the requestor, that name should be entered in this field. It is important to capture this information in the case that another person requests this same container while it is out on this retrieval. This is a walk-a-long field, the names displayed here are those set up in the ‘Security’ tab of the customer maintenance screen for the customer selected on the work order. If the customer account has been marked ‘Engage Security’ this field must be populated with a name listed in the drop down listing, these are the only authorized persons.

This field is for the user to enter a billing reference if one is needed for the customer.

If default activity codes have been set up in Total Recall, and the activity code displayed is not to be used, check this box and overwrite the activity code, with the activity code to be used.
**Activity Code**

This field refers to the retrieval of the container and the charges associated with this service. The choices that appear here are those that were set up with a category code of ‘1’ on the master or customer service code screens during setup. This is a walk-a-long field for easy entry of the appropriate activity code. To view a list of the available activity codes, click on the down arrow to the right of the field, the selection can be highlighted and selected by double clicking with the mouse or pressing the [ENTER] key.

*Note: If a priority code was entered on the work order header and default service codes have been setup, this default service code will automatically be displayed in this field when the container for retrieval has been selected. To enter an activity code other than the code automatically selected click on the ‘Do Not Use Default Activity Code’ and enter the alternate activity code.*

**Transport**

This field is used to enter a transportation charge associated with the work order line. Depending on the requirement code used in the transportation setup for the customer, this field may be populated automatically.

Transportation requirement codes 1-3 requires for the user to enter a code in this field if the line charge is to be used to determine the work order transportation charges.

Transportation requirement codes 4-6 will automatically display a line transportation code in this field if ‘Container Retrievals’ has been selected during the setup.

The codes that appear in this drop down menu are those entered with a category code of a ‘5’ in the master or customer service code listings.

*Note: Refer to Chapter 5 – Maintenance – Customers – Minimum Transportation Settings or the Quick Reference Guide titled ‘Automatic Transportation Options’, for information on the transportation requirement codes.*

**Misc. Codes**

Enter up to four (4) miscellaneous codes for each work order line. These fields are used to charge for services performed in conjunction with retrieving the container. Click on the down arrow key to the right of this field to view the available service code choices. This is a walk-a-long field for easy entry. The codes displayed here are those with a category ‘9’ miscellaneous codes; or a category of ‘4’ – storage codes; or a category ‘5’ transportation codes, to allow for multiple transportation charges to be entered. When a code has been entered, a quantity must be entered otherwise Total Recall will automatically assume a quantity of 1.

*Note: Refer to Chapter 5 – Master or Customer Service Codes for additional information on adding additional service codes.*
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom Billing Line</td>
<td>This field allows for the user to enter a custom billing item on the work order line. A price and quantity should also be entered. This will print on the invoice exactly as entered in this field. If the custom billing line is used, and a general ledger or tax rate is needed, click on this button to the right of the custom billing line. A window will display allowing the user to enter a tax rate and/or a general ledger number. Upon entry the user will click the ‘X’ in the upper right corner of the window and upon saving the line the tax rate and/or general ledger number will be saved with the work order line.</td>
</tr>
<tr>
<td>Retrieve Fungible Items</td>
<td>This field is part of the fungible module included with Total Recall. The fungible module allows a user to track commodities of same items within a container, retrieving only partial quantities at a time. The quantities are tracked and stored with the container inventory record. Note: Refer to a later section in this chapter on the fungible module.</td>
</tr>
<tr>
<td>Special Options</td>
<td></td>
</tr>
<tr>
<td>Date Out</td>
<td>This date automatically defaults to the current days date but can be edited. Note: If the system parameter setting has been selected to ‘Make Item Out Dates equal to Work Order Close Dates’, this field will automatically be updated to the date the work order is closed, when the work order is closed.</td>
</tr>
<tr>
<td>Due Date</td>
<td>This field will automatically calculate the date the container is due back to the record center from the ‘Default Days’ associated with the retrieval code if a default days was associated with the retrieval code. This field can be left blank or filled in with a date that you expect the container to be returned to the record center. If this information is tracked, reports can be provided to your customer broken down by the date the container was due back to center.</td>
</tr>
<tr>
<td>Phone</td>
<td>This field is for the telephone number of contact person. This information in not required but can be very useful if there is a question about the container retrieval.</td>
</tr>
<tr>
<td>Print Label?</td>
<td>Entering a ‘Y’ in this field will flag the record to print a label for this container. The container labels are printed from the work order input screen, &lt;Labels&gt; button. This field can be set in the system parameters to always display as ‘Y’, if a label is to be printed for every container upon retrieval. If the ‘Bar Coded’ function has been set up this will automatically alert the user upon retrieval if a label has not been printed for the selected container and prompt the user to mark the ‘Print Label?’ field with a ‘Y’.</td>
</tr>
</tbody>
</table>
Container Information

Storage Code
This field will display the storage code associated with the container from the inventory record.

Container Dept
This field will display the department associated with the container, if any, from the inventory record.

Cubic Ft
This field will display the cubic footage associated with the container from the inventory record, if it exists.

Desc
After the container has been selected, this field will display the container description from the inventory record if a container description exists.

Reference Fields
When the container has been selected, the reference field information from container inventory record will display in these fields. To view the information in reference fields four through nine, click on the <More> button. Note: If the customer reference fields have been customized they will reflect as the customized caption.

Open Shelf Management
This screen is often referred to as the medical records search screen. When a search is invoked on this screen, it will search both the container and indexed item inventories.

To access the open shelf management screen, the user will click on the lightning bolt to the right of the <Retrieve Container> button. A screen similar to the one in Fig 3.9 will display. The captions that display at the top of the fields can be set to display container captions, indexed item captions or both container and indexed item captions. This option is set in the system parameters screen, the field displays as ‘Rapid Order Screen Captions’, select container, indexed item or both. Note: Refer to Chapter 10 – Parameters – Custom Captions – for more information on this feature.
Open Shelf Management Screen

Fig. 3.9

This screen can be used to search for items currently indexed in Total Recall, indexed items that are on open shelves, and indexed items in boxes that have or have not been indexed.
Search for Indexed Items

In the search data area of the screen the user will enter information into one or more of the fields to be searched, pressing the [ENTER] key to invoke the search. Total Recall will search both the container and indexed item databases for matches. All matches will be listed in the middle section of the screen titled ‘Inventory Listing’. Scroll through the listing, if the record being searched for is listed, double click the record the record will be selected and the history for that record will display. Click on <Save> at the bottom of the screen to add this item to the work order. Once an item has been saved the screen will clear for the next entry. To repeat information from the previous record on a new record, with the cursor in the appropriate field, press the F9 key, the data from the same field on the previous record will display. See the next page for details on additional buttons and fields on this screen.

Search for Non-Indexed Items

In the search data area of the screen the user will enter all information pertinent to the item requested. If the item requested is stored in a container, enter either the customer box number or the Total Recall container number into their appropriate fields directly below the search data fields. Press the [ENTER] key to invoke the search. Total Recall will search both the container and indexed item databases for matches, a match will only be found if the item was previously retrieved. If a match is found, double click to select and then click on <Save>.

The customer can be set to allow the user to add the non-indexed item and retrieve it using separate codes on this screen. To invoke this feature, access the customer maintenance screen for the appropriate customer, click on the <RO> button and check the field: ‘Allow in-house users to add new items’. The codes to be used for the indexing and retrieval are to be entered on this screen or can be entered on the individual work order Line screen. Note: If a user enters information for a new non-indexed item retrieval, a container number must be entered, which will automatically check the field ‘File in Box’, if a container is not indicated, the new entry will be added to inventory as a container. Once an item has been saved the screen will clear for the next entry. To repeat information from the previous record on a new record, with the cursor in the appropriate field, press the F9 key or double click with the mouse, the data from the same field on the previous record will display. The next page details the buttons and fields on this screen.
Reference Fields

The fields across the top of the screen are the reference fields, the captions that are displayed here are those set up under the Customer Maintenance – Custom Caption ‘Tab’. The captions can be the container captions, indexed item captions or both the container and indexed item captions, the caption selection for this screen is set up on the System Parameters – Default Captions ‘Tab’. The data to be searched is to be entered into one or more fields to identify the item to be retrieved. When the item has been selected, these fields will display the information currently residing in the specified fields from inventory. If the in-house users are adding non-indexed items using this screen, as much information as available should be entered into these fields.

Description

This field caption may display other than ‘Description’ if this caption has been customized on the Customer Maintenance screen – Custom Caption ‘Tab’. Data can be entered into this field to identify a record to be retrieved. When an item has been selected, this field will display the data from the description field of the record selected from inventory.

Clear

Click on the <Clear> button to clear all information previously entered into the ‘search data’ fields. This will allow the user to invoke a new search.

Search

Click the <Search> button to be taken to the container inventory screen. When the container where the non-indexed item is located, highlight the record and click on the <Select> button, the container information will be pasted into the retrieval screen.

Query

This feature allows for a user to build a query and view the result set. This result set can then be exported back to the work order line. Refer to Chapter 1 - Introduction - Query Builder or the Quick Reference Guide on queries, for more information on this feature.

Item Type

If an item type has been associated with the item being retrieved, that item type can be selected from this field, during the search, only records matching this item type will display. This is a walk-a-long field for easy entry. If the record is being added as it is retrieved, and an item type has been selected, this item type will be stored with the record in inventory.

Notes

Enter into this area any notes that may be pertinent to the retrieval.

Note: After Saving a record, use the mouse to double click in any blank entry field or press the F9 key on the keyboard, the data entered before the last save will display in the field.

Codes

The screen on Fig. 3.10 will display when the <Codes> button is invoked. This screen allows the user to set codes to be used when an item is entered on this screen.
Service Codes Screen

Fig. 3.10

If codes are listed here, they were previously set up in the <RO> button on the customer maintenance screen. If codes are not set up for the customer, the following codes are used by default: **DEL** – for a retrieval and **BIW** – for a return to the warehouse. *Note: If a priority code was entered on the work order header and default service codes have been setup, this default service code takes precedence over any code entered on this screen.*

- **Setup Code** The codes displayed here are both container and indexed item retrieval codes. Depending on the data being entered, select the appropriate code.
- **Store Code** Enter the store code associated if an item is being added for non-indexed items or containers that have not yet been added to Total Recall (these can include open shelf items that are not indexed)
- **Cubic Feet** If a cubic size is associated with the storage code, the cubic size will display in this field. The user also has the opportunity to enter a cubic feet if none is assigned to the storage code.
- **Index Code** Codes listed here are those associated with adding a container or an indexed item and the charges associated with these activities.
- **Transport** The transport field allows the user to add a line transportation charge to each line added to the work order.
- **Edit** This feature is only enabled after an item has been selected from the inventory listing. This feature allows the user to edit the currently displayed inventory record. Clicking on this button opens the container in indexed item maintenance screen for the displayed item. After the record has been edited the changes reflect immediately on the data entry screen and in the inventory record.
- **Pull From** This field displays the department associated with the record being pulled, if a department is associated with the record in inventory.
**Bill To**  This field allows the user to enter a ‘Bill To’ department if activity on this screen is to be charged to a department other than the ‘owner’ department. If a department was entered on the general ‘Tab’ of the work order, this department will automatically display in this field.

**Out To**  Enter the name of the person requesting the item.

**Print Label**  To have the labels automatically print as they are entered, check this box, the print screen will display. Click <OK> and a label will be printed.

**Retrieve File**  This function is used to temporarily retrieve an indexed item from a container. When an item is retrieved from a container, contact information from the person requesting the indexed item remains with the record until the indexed item is returned.

*Note: If the file being requested has not been previously indexed, see the next section on retrieving a non-indexed file, which will add and retrieve the file at the same time.*

Fig. 3.11 shows the input screen that is displayed when the < Retrieve File > button is selected from the work order Input screen. The table immediately following the screen will detail the fields displayed on this input screen.

**Current Location**  Displays the current location of the item to be retrieved.

**Add New**  Opens the “Input New File/Item Stored in a Container” window. Complete file/item fields as necessary for the new item.
Line #  This field displays the number of the current line displayed on the screen. This number is incremented every time a <Save> is engaged. The number of saved lines on the current work order is one less than what is displayed in the <Line #> field.

Search Options
These fields allow a user to quickly locate an item if the information contained in either field is known and this information is unique for the customer. First, enter any additional charges and contact information and then enter the TR Item Barcode # or Ref 1 # data in the appropriate field. Total Recall™ will search the field for the item. If the item is located in inventory, the record will display on the screen and a window will display prompting the user: ‘Do you wish to save this record?’ to save the record and add the line to the work order. If the data entered into this field exactly matches more than one record, the following message prompt will display: ‘More than one match was found for the specified criteria xxxxxxxx… Do you wish to view the matches now?’ Click <Yes> to view, then select the appropriate container.

View List  Displays the list in Total Recall™ inventory. Item currently checked out are highlighted in red. Select an item, then right-click to view a menu of available commands.

Query  This feature allows for a user to build a query and view the result set. This result set or selected records from the result set can then be exported back to the work order lines. Refer to Chapter 1 - Introduction - Query Builder or the Quick Reference Guide on queries, for more information on this feature.

Location  Enter the location where the item is stored. The location number identifies the container and should be located on the label on the container. If the location is not known, click on the binoculars icon to search the container inventory screen. When the record is found, highlight the record and click on the <Select> button to transfer the information to the work order line. If a T.R. item number or the reference 1 field has been entered to identify the container, the location field will automatically display.

History  After a item has been identified, the item history button to the right of the ‘T.R. Barcode #’ field will display a print report screen with the selected item number displayed for the user to quickly view the history of the
item. This report can be displayed on the screen or can be printed.

**Charge To Dept**
If the customer is a departmentalized customer, this field is used for entering the department for which the item retrieval is to be charged. Total Recall will automatically default to the department associated with the item but it can be changed if a different department is to be charged.

**Check Out To**
This field should reflect the name of the person requesting the retrieval of the item. If a ‘Request By’ person was entered in the work order header, this name will automatically display in this field. This name can be changed. The names that appear here are those that appear in the security ‘tab’ of the customer maintenance screen for the selected customer.

**Billing Ref**
This field allows the user to enter a billing reference to be associated with the work order Line.

**Billing Details**

**Do Not Use Default Activity Code**
If default activity codes have been set up in Total Recall, and the activity code displayed is not to be used, check this box and overwrite the activity code, with the activity code to be used.

**Activity Code**
This field refers to the retrieval of the item and the charges associated with this service. This is a walk-a-long field for easy entry of the appropriate activity code. To view a list of the available activity codes, click on the down arrow to the right of the field, the selection can be highlighted and selected by double clicking with the mouse or pressing the [ENTER] key. Note: If a priority code was entered on the work order header and default service codes have been setup, this default service code will automatically be displayed in this field when the container for retrieval has been selected. To enter an activity code other than the code automatically selected click on the ‘Do Not Use Default Activity Code’ and enter the alternate activity code.

**Transport**
Use this field to enter a line transportation code associated with this item retrieval if there are any to be associated. This is a walk-a-long field for easy entry of the appropriate code. Note: Depending on the transportation setup (if any) in the customer maintenance screen, this field may be automatically entered. Refer to Chapter 5 – Maintenance – Customers – Minimum Transportation Settings or the Quick Reference Guide titled ‘Automatic Transportation Options’, for information on automating the transportation charges.

**Misc. Codes**
Enter up to four (4) miscellaneous codes for each work order line. These fields are used to charge for services performed in conjunction with the
service. Click on the down arrow key to the right of this field to view the available service code choices. The codes displayed here are those with category ‘9’ miscellaneous codes; or a category of ‘4’ – storage codes; or category ‘5’ transportation codes, to allow for multiple transportation charges to be entered. A quantity must be entered otherwise Total Recall will automatically assume a quantity of 1. Note: Refer to Chapter 5 – Master or Customer Service Codes for additional information on adding additional service codes.

**Special Options**

**Date Out**  This is the date the item will be retrieved. Total Recall™ will calculate and insert a date based on System Parameters, but the date can be modified, if necessary.

**Due Back Date**  This is the date the item should be returned to inventory. Total Recall™ will calculate and insert a date based on System Parameters, but the date can be modified, if necessary.

**Print Label?**  Enter a “Y” to set the ‘flag’ to have a label printed for the selected item. The labels are printed from either the work order screen via the <Labels> button or from the operational reports menu – file labels for open work orders report using the information that has been flagged.

**Phone**  The phone number associated with the requestor.

**Item Information**

**Item Dept**  This field will display the department associated with the item from the inventory record. If there is not a department associated with the item, this field will display as blank.

**Desc.**  This field will display the item description from the inventory record, once the item has been identified.

**Reference Fields**  When the item is selected the inventory record will display the information from these fields in the inventory record. Note: If the reference fields for the customer have been customized they will reflect as the customized caption and not as ‘Ref 1/2/3’.

**Retrieve fungible items**  Retrieves fungible items from container. Specify the quantity of items to be retrieved. Total Recall™ will calculate the current stock quantity in the Quantity Available field.
Retrieve Non-Indexed File

This function is used to temporarily retrieve a non-indexed item from a container. When retrieving an item that has not been previously indexed, an index is created for the item upon retrieval. Usually a file label is created and placed on the indexed item prior to it being sent to the customer. Contact information from the person requesting the file and the date it was requested remains with the record until the file is returned.

Note: A storage code is not required when entering a non-indexed item. Although a storage code can be entered on this screen or if file storage is to be charged when an item is retrieved, the item will assume the 'bill file storage code' setup on the customer maintenance screen – defaults 'tab'.

Fig. 3.12 shows the input screen that is displayed when the Lightning Bolt < to the right of the <Retrieve File> button is selected from the Work Order Input screen. The table on the immediately following will detail the fields displayed on this screen.
**Line #**
This field displays the number of the current work order line displayed on the screen. This number is incremented every time a `<Save>` is engaged. The number of lines currently added to the work order is one less than what is displayed in the `<Line #>` field.

**Search Options**
These fields allow a user to quickly locate a container if the information contained in either field is known and this information is unique for the customer. First, enter any additional charges and contact information and then enter the TR Barcode # or Box # data in the appropriate field. Total Recall™ will search the field for the container. If the container is located in inventory, the record will display on the screen and a window will display prompting the user: ‘Do you wish to save this record?’ to save the record and add the line to the work order. If the data entered into this field exactly matches more than one record, the following message prompt will display: ‘More than one match was found for the specified criteria xxxxxxx… Do you wish to view the matches now?’ Click `<Yes>` to view, and then select the appropriate container.

**View List**
Displays the list of containers in Total Recall™ inventory. Containers currently checked out are highlighted in red. Select an item, then right-click to see a menu of available options.

![Menu Options](image)

**Query**
This feature allows for a user to build a query and view the result set to locate the container for which the item is to be found. The selected record from the result set can then be exported back to the work order line. Refer to Chapter 1 - Introduction - Query Builder or the Quick Reference Guide on queries, for more information on this feature.

**Retrieve**
This button allows a user to jump to the ‘temporarily retrieve an item in a container’ screen. This allows the user to then retrieve an indexed item.

**Print Label?**
Enter a “Y” to set the ‘flag’ to have a label printed for the selected indexed item. The labels are printed from either the work order screen via the `<Labels>` button or from the operational reports menu.
**View No Finds**  
After a container has been identified, use the mouse to click this button and view a listing of all items from the selected container that have been previously marked as ‘Not Found’.

**TR Item Fixed Storage**  
Enter into this field a unique (to the container) item ID for the item being retrieved. This item ID will track the item within Total Recall.

**Dynamic Allocation**  
This field serves as an additional indexed field to be used if necessary to identify the item. This caption may be customized.

![Click to view List of Indexed Items in Containers.](image)

**Dept**  
This field indicates the department the retrieval is to be charged to, if the container is listed in inventory with a department, the department will be listed here. This department can be edited if the department to be charged is different than the container department. Click on the down arrow to the right of this field to display a listing of the available departments. This is a walk-a-long field for easy entry.

**Check Out To**  
If the ‘Requested By’ field was entered in the work order header, that name will automatically display in this field. If the person who is to receive the container is other than the requestor, that name should be entered in this field. It is important to capture this information in the case that another person requests this same container while it is out on this retrieval. This is a walk-a-long field, the names displayed here are those set up in the ‘Security’ tab of the customer maintenance screen for the customer selected on the work order. If the customer account has been marked ‘Engage Security’ this field must be populated with a name listed in the drop down listing, these are the only authorized persons.

**Billing Ref**  
This field allows the user to enter a billing reference to be associated with the work order line.

**Billing Details**

**Setup Code**  
This field refers to the retrieval of an item within a container, and the charges associated with this service. This is a walk-a-long field for easy entry, click on the down arrow key to the right of this field to view the available setup code choices. The choices that appear here were set up with a category code of ‘D’ on the master or customer service code screens. *Note: Refer to Chapter 5 – Master or Customer Service Codes for additional information on adding additional service codes.*
**Store Code**  Enter the storage code to be associated with the item that is to be retrieved from the container indicated. This is an optional field. If the storage code is related to an item type, the item type will automatically be associated with the item when the storage code is selected.

**Transport Code**  Use this field to enter a line transportation code associated with this non-indexed item retrieval if there are any to be associated. This is a walk-a-long field for easy entry of the appropriate code. *Note: Depending on the transportation setup (if any) in the customer maintenance screen, this field may be automatically entered. Refer to Chapter 5 – Maintenance – Customers – Minimum Transportation Settings or the Quick Reference Guide titled ‘Automatic Transportation Options’, for information on automating the transportation charges.*

**Misc. Code**  This field gives the user the option to enter a single miscellaneous code for each work order line. This field can be used to charge for services performed in conjunction with retrieving the non-indexed item. Click on the down arrow key to the right of this field to view the available service code choices. This is a walk-a-long field for easy entry. The codes displayed here are those with a category ‘9’ miscellaneous codes; or a category of ‘4’ – storage codes; or a category ‘5’ transportation codes, to allow for multiple transportation charges to be entered. When a code has been entered, Total Recall will automatically assume a quantity of 1, if additional miscellaneous codes are necessary use the ‘Other’ billing line option. *Note: Refer to Chapter 5 – Master or Customer Service Codes for additional information on adding additional service codes.*

**Container Location**  This field will display the container location as stored in inventory. This is a non-editable field and will display as soon as the container is identified.

**File Check Out Date**  This field records the date the item is retrieved. The field automatically defaults to the current day’s date but can be edited. *Note: If the system parameter setting has been selected to ‘Make Item Out Dates equal to Work Order Close Dates’, this field will automatically be updated to the date the work order is closed, when the work order is closed.*

**History**  After a container has been identified, the container history button to the right of the ‘T.R. Con #’ field will display a print report screen with the selected container number displayed for the user to quickly view the history of the container. This report can be displayed on the screen or can be printed.
File Reference Information

Type
Users can use the drop down arrow to select the item type of this index item.

T.R. Con #
This field allows the user to identify the container in which the item is to be located by entering the Total Recall container number in this field. The location of the container and the department owning the container (if previously assigned) will display. The department can be changed if the retrieval charges are to be assessed to a different department.

Description
This field is for the user to enter the item description. This file description can be used to identify the item to be retrieved from within the container. Note: If the reference fields are used to identify files, this field may be left blank and data would be entered in the reference fields.

Ref 1/2/3
When a non-indexed item is requested for retrieval, the item must be identified by either entering an item description and/or entering information into the reference fields. If information is to be entered into the reference fields, these field captions are usually customized to reflect the information to be entered into the fields. If reference fields are to be used to identify the file, enter the data into the appropriate reference fields. Note: If the reference fields for the customer have been customized they will reflect as the customized caption and not as ‘Ref x’.

More
This button allows for additional reference field information to be entered for reference fields four through nine.

Grid Area
The grid area of the retrieve non-indexed item screen displays any items that were previously indexed and retrieved from the container selected. This information will not display until a container number has been entered. If the item that is currently being requested displays in the lower portion of the screen, with a retrieval date, then the Item is currently retrieved. If there is no retrieval date, the item has been previously indexed and may or may not have been previously retrieved. If the file is listed in the grid area, use the mouse to highlight and double click the selection, the retrieve indexed Item screen will display and the user will be able to complete the retrieval.

Show all Indexed Items
This is the default setting when this screen is engaged. With this button engaged all items that have been indexed within the selected container are displayed in the grid area of the screen regardless of the current retrieval status of the record.

Show only Retrieved Indexed Items
Click this button to display only those items that currently have a retrieved status of true. The items will display in the grid area of this screen once a container has been selected.
Refile Container

Fixed Allocation – When a container is returned to the record center after a temporary retrieval, it must be return to its original location indicated on the container label.

Dynamic Allocation – When a container is returned to the record center after a temporary retrieval, because it is being tracked by the unique Total Recall container number, it can be re-shelved anywhere in the record center. The re-filing is usually done through the handheld scanner.

From the system parameters screen, when dynamic allocation is selected, a checkbox displays: ‘Release Location when Container is Retrieved?’ If this is checked the location of the container being re-filed will display blank. If it is not checked, the last location where the container was housed will remain in the record until the container is returned. Note: See Chapter 10 – System Parameters – Work Order Space Allocation for more information on this option.

Note: If containers will be manually re-filed, and the location is not released when the container is retrieved, Total Recall will prompt the user with the location where the container last resided and prompt the user to return it to the same location – the user then has the option to return to the same location or enter a new location where the container will be shelved.

The screen similar to the one in Fig. 3.13 displays when the <Re-file Container> button is engaged.

![Refile Container Window](image)
Line #  This field displays the number of the current line displayed on the screen. This number is incremented every time a <Save> is engaged. The number of saved lines on the current work order is one less than what is displayed in the <Line #> field.

Search Options
These fields allow a user to quickly locate a container if the information contained in either field is known and this information is unique for the customer. First, enter any additional charges and contact information and then enter the TR Barcode # or Box # data in the appropriate field. Total Recall™ will search the field for the container. If the container is located in inventory, the record will display on the screen and a window will display prompting the user: ‘Do you wish to save this record?’ to save the record and add the line to the work order. If the data entered into this field exactly matches more than one record, the following message prompt will display: ‘More than one match was found for the specified criteria xxxxxxxx… Do you wish to view the matches now?’ Click <Yes> to view, then select the appropriate container.

View List  Displays the list of containers in Total Recall™ inventory. Containers currently checked out are highlighted in red. Select an item, then right-click to view a menu of available commands.

Query  This feature allows for a user to build a query and view the result set. This result set or selected records from the result set can then be exported back to the work order lines. Refer to Chapter 1 - Introduction - Query Builder or the Quick Reference Guide on queries, for more information on this feature.

Location  Fixed Allocation – Enter the location where the container was previously stored. The location number identifies the container and should be located on the label on the container. If the location is not known, click on the binoculars icon to search the container inventory screen. When the record is found, highlight the record and click on the <Select> button to transfer the information to the work order line. If a T.R. container number or the reference 1 field has been entered to identify the container, the location field will automatically display.
Dynamic Allocation – Enter into the ‘Location’ field the location where the container will be returned. If the location was not released when the container was retrieved, after identifying the container, Total Recall will prompt the user to return to the same location. If the user responds <Yes> the location will automatically display with the previous location. If the user responds <No> the location will display blank and the user will have the opportunity to enter a location where the container is to be re-shelved.

History After a container has been identified, the container history button to the right of the ‘T.R. Con #’ field will display a print report screen with the selected container number displayed for the user to quickly view the history of the container. This report can be displayed on the screen or can be printed.

Activity Code This field refers to the re-file of the container and the charges associated with this service. The choices that appear here are those that were set up with a category code of ‘E’ on the master or customer service code screens during setup. This is a walk-a-long field for easy entry of the appropriate activity code. To view a list of the available activity codes, click on the down arrow to the right of the field, the selection can be highlighted and selected by double clicking with the mouse or pressing the [ENTER] key. Note: If a priority code was entered on the work order header and default service codes have been setup, this default service code will automatically be displayed in this field when the container for re-files has been selected. To enter an activity code other than the code automatically selected click on the ‘Do Not Use Default Activity Code’ and enter the alternate activity code.

Charge To Dept If the customer is a departmentalized customer, this field is used for entering the department for which the container re-file is to be charged. Total Recall will automatically default to the department associated with the container but it can be changed if a different department is to be charged for the re-file.

Requested For This field should reflect the name of the person returning the container. If a ‘Request By’ person was entered in the work order header, this name will automatically display in this field. This name can be changed if the person who is returning the container is not the person making the request. The names that appear in this drop down are those that appear in the security ‘tab’ of the customer maintenance screen for the selected customer.
Billing Ref
This field allows the user to enter a billing reference to be associated with the work order Line.

Billing Details

Do Not Use Default Activity Code
If default activity codes have been set up in Total Recall, and the activity code displayed is not to be used, check this box and overwrite the activity code, with the activity code to be used.

Activity Code
This field refers to the retrieval of the container and the charges associated with this service. The choices that appear here are those that were set up with a category code of ‘1’ on the master or customer service code screens during setup. This is a walk-a-long field for easy entry of the appropriate activity code. To view a list of the available activity codes, click on the down arrow to the right of the field, the selection can be highlighted and selected by double clicking with the mouse or pressing the [ENTER] key. Note: If a priority code was entered on the work order header and default service codes have been setup, this default service code will automatically be displayed in this field when the container for retrieval has been selected. To enter an activity code other than the code automatically selected click on the ‘Do Not Use Default Activity Code’ and enter the alternate activity code.

Transport
Use this field to enter a line transportation code associated with this container re-file if there are any to be associated. This is a walk-a-long field for easy entry of the appropriate code. Note: Depending on the transportation setup (if any) in the customer maintenance screen, this field may be automatically entered. Refer to Chapter 5 – Maintenance – Customers – Minimum Transportation Settings or the Quick Reference Guide titled ‘Automatic Transportation Options’, for information on automating the transportation charges.

Misc. Codes
Enter up to four (4) miscellaneous codes for each work order line. These fields are used to charge for services performed in conjunction with retrieving the container. Click on the down arrow key to the right of this field to view the available service code choices. This is a walk-a-long field for easy entry. The codes displayed here are those with a category ‘9’ miscellaneous codes; or a category of ‘4’ – storage codes; or a category ‘5’ transportation codes, to allow for multiple transportation charges to be entered. When a code has been entered, a quantity must be entered otherwise Total Recall will automatically assume a quantity of 1. Note: Refer to Chapter 5 – Master or Customer Service Codes for additional information on adding additional service codes.
**Special Options**

**Print Label?**
Enter a “Y” to set the ‘flag’ to have a label printed for the selected container. The labels are printed from either the work order screen via the `<Labels>` button or from the operational reports menu – file labels for open work orders report using the information that has been flagged.

**Change Expire Date**
This field is used in conjunction with the tape management portion of Total Recall. This field allows for the user to enter a new expiration date to be associated with the tape.

**Container Information**

**Container Dept**
This field will display the department associated with the container from the inventory record. If there is not a department associated with the container, this field will display as blank.

**Cubic Ft**
When a container is selected the cubic feet associated with the container in inventory will display. If the cubic foot field has not been previously entered, this field will display blank.

**Desc.**
This field will display the container description from the inventory record, once the container has been identified.

**Reference Fields**
When the container is selected the inventory record will display the information from these fields in the inventory record. *Note: If the reference fields for the customer have been customized they will reflect as the customized caption and not as ‘Ref 1/2/3’.*

**Add Fungible Items to Container**
This field is part of the fungible module included with the Total Recall. The fungible module allows a user to track commodities of same items within a container. This checkbox will allow the user to add additional stock to the container in inventory. The quantities are tracked and stored with the container inventory record. *Note: Refer to the section on the fungible module later in this chapter.*

**Qty.**
This field allows the user to indicate the quantity of items being added to the container selected for the fungible module. *Note: Refer to the section on the fungible module later in this chapter.*

**Current Quantity**
When the container is selected and the checkbox to the right of ‘Add Fungible Items to a Container’ is selected, the current quantity of items within the container will display. *Note: Refer to the section on the fungible module later in this chapter.*
**Re-file File**  When an indexed item is returned to the record center, the user has the option to return the file to a temporary location or immediately return the item to its permanent container. While the file resides in a temporary location, the item record maintains both the container location and the temporary location. The Apex scanner is often used to re-file indexed items to a temporary location and then to its permanent location.

*Note: When an indexed item is returned back to the record center, if the record is NOT to be maintained in the current indexed item inventory listing because it is Not an indexed account. Select the option from the Customer Maintenance screen – Default tab: ‘Do Not Maintain a Perpetual List of Index Items’. See chapter 5 for more information on this feature. If this feature is engaged, each time the item is retrieved, a new indexed is created and a new label is placed on the file.*

Fig. 3.14 shows the screen that displays when the **<Re-file File>** button is selected.

**Refile Item window**

**Line #**  This field displays the number of the current work order line displayed on the screen. This number is incremented every time a **<Save>** is engaged. The number of lines currently added to the work order is one less than what is displayed in the **<Line #>** field.

**Query**  This feature allows for a user to build a query and view the result set to locate the indexed item(s) to be returned to storage. Record(s) are selected and can be exported back to the work order. *Refer to chapter 1 - Introduction - Query Builder or the Quick Reference Guide on queries, for more information on this feature.*


**Activity Code**
This field refers to the re-file of an indexed item within a container, and the charges associated with this service. This is a walk-a-long field for easy entry, click on the down arrow key to the right of this field to view the available Setup Code choices. The choices that appear here were set up with a Category Code of ‘F’ on the Master or Customer Service Code screens. Note: Refer to Chapter 5 – Master or Customer Service Codes for additional information on adding additional service codes.

**Reference 1 Special Search**
This field allows for the user to identify the indexed item to be re-filed by entering the data that is currently contained in the reference 1 field for the indexed item inventory record. This field often times contains a unique file name or number. The user should first enter the activity code and all other charges associated with the Re-filing of the item, the reference 1 information is then entered and the [ENTER] key is engaged, if a match is found Total Recall will prompt the user: ‘Do you wish to save this record?’ The user can simply click <Yes> and continue to re-file Items. If more than one match is found, Total Recall will prompt the user to view the inventory to select the Item for re-file. If the data entered is not found, Total Recall will prompt the user: ‘Item not Found!’ The user then will click the <OK> button and enter other data or click on the binoculars to search the inventory.

**Location**
The location where the permanent container is currently stored will display when the item being re-filed has been identified.

**T.R. Con #**
The Total Recall container number for the container where the indexed item is permanently stored will display when the item has been identified.

**Container Desc**
This field will display the container description (if any exist) from the inventory record.

**Cur Loc**
If the item being re-filed is to be placed into a temporary location, enter the temporary location into this field. If items are being returned via the handheld scanner, the temporary location the item is scanned to will display in this field.

**Item ID Fixed Storage** – Enter into this field the unique item ID for the indexed item to be re-filed and Total Recall will automatically fill in the location of the container, the Total Recall container number, and the Total Recall item number.

**Dynamic Allocation** – This field will automatically default to the information contained within this field, if any, in the indexed item inventory record when the file has been identified.
T.R. Item #  **Fixed Allocation** – This is a unique Total Recall tracking number used to track the indexed item. This number can be entered to identify the item to be re-filed. If the unique item ID has been entered the Total Recall item number will display automatically.

**Dynamic Allocation** – This is the unique Total Recall item number for the item being re-filed, this is the number displayed in barcode usually attached to the item when it is retrieved.

**Desc** This field will display the data in the description field for the indexed item from the inventory record. If the description field for the item in inventory is blank, this field will display as blank also.

**Charge To Dept** This field will display the owner department for the indexed item if a department has been associated with the item. If the department this re-file service is to be charged to is different then the owner department, click on the down arrow to the right of this field to display a listing of the available departments for the customer. This is a walk-a-long field for easy entry, select the department for which the item re-file is to be charged.

**Person** This field is for the name of the person re-filing this indexed item. If a requestor Name was indicated in the ‘Request By’ field on the work order header, this name will be transferred to this field but can be changed if the person requesting this re-file is not the same person.

**Transport** Use this field to enter a line transportation code associated with this item re-file if there are any to be associated. This is a walk-a-long field for easy entry of the appropriate code. *Note: Depending on the transportation setup (if any) in the customer maintenance screen, this field may be automatically entered. Refer to chapter 5 – Maintenance – Customers – Minimum Transportation Settings or the Quick Reference Guide titled ‘Automatic Transportation Options’, for information on automating the transportation charges.*

**Billing Ref** This field allows the user to enter a billing reference to be associated with the re-file of the indexed item.
Misc. Codes  Up to four (4) miscellaneous codes can be entered for each re-file item work order line. These fields are used to charge a customer for miscellaneous services performed associated with the re-file of the indexed item. Click on the down arrow key to the right of this field to view the available miscellaneous code choices. This is a walk-a-long field. The choices that appear here are those that were set up as a code of ‘9’ on the master or customer service codes. Any category code ‘5’ service code will also display here so that the user can enter a transportation code with a quantity. When a code is selected, the code description is displayed to the right of the code. When a miscellaneous code has been entered, a quantity must be entered, if no quantity is entered, Total Recall will assume a quantity of one (1). Refer to chapter 5 - Master or Customer Service Codes for additional information on adding miscellaneous service codes.

Reference Fields  When the indexed item to be re-filed has been identified and selected, any information residing in the reference fields of the inventory record will display in these reference fields. Note: If the reference fields for the customer have been customized they will reflect as the customized caption and not as ‘Ref’.

Item Dept  This field pulls over the owner department of the indexed item if a department exists in inventory for the item identified.

Add Fungible Items to the Container  This field is part of the fungible module included with the Total Recall. The fungible module allows a user to track commodities of same items within a container. This checkbox will allow the user to add additional stock to inventory. The quantities are tracked and stored with the item inventory record. Note: Refer to a later section in this chapter on the fungible module.

Qty  This field allows for a number to be entered indicating the quantity of items being added to the item selected for the fungible module. Note: Refer to the section on the fungible module later in this chapter.

Current Quantity Fungible Items to the Container  When the Item is selected and the checkbox to the right of <Add Fungible Items to the Container> is selected, the current quantity of Items within the container will display. Note: Refer to the section on the fungible module later in this chapter.
Print Label? Enter a “Y” to set the ‘flag’ to have a label printed for the selected indexed item. The labels are printed from either the work order screen via the <Labels> button or from the Operational Reports Menu – File Labels for open work orders report using the information that has been flagged.

Do Not use Default Activity Code If Default Activity Codes have been set up in Total Recall, and you do not want the Default Activity Code for this Work Order Line, check this box and enter an Activity Code of your choice.
Remove Container

This function is used to permanently remove a container from inventory. When a container is removed, Total Recall requires much of the same information that is required when a container is temporarily retrieved. When a container is removed from inventory, any indexed items associated with that container are also removed.

Note: It is recommended that you have separate activity codes for containers that you permanently remove and destroy and for containers that you permanently remove and return to the customer. This removal activity code stays with the container when it is moved to the permanent removal database and can serve as a reference when a customer requests a container that has been removed from inventory.

Note: It is recommended that a user verify the items being removed by either using a keyboard wedge or sending the work order to the Apex scanner for verification, a work order must be verified prior to the work order being closed, once a work order is closed, it cannot be verified.

When a work order is closed where containers were removed, the inventory record is moved to the permanent removal inventory listing and can no longer be accessed in the active inventory listing. Fig. 3.15 shows the input screen displayed when the <Remove Container> button is selected. The following pages detail the fields on this screen.
**Line #**  This field displays the number of the current line displayed on the screen. This number is incremented every time a `<Save>` is engaged. The number of saved lines on the current work order is one less than what is displayed in the `<Line #>` field.

**Search Options**
These fields allow a user to quickly locate a container if the information contained in either field is known and this information is unique for the customer. First, enter any additional charges and contact information and then enter the TR Barcode # or Ref 1 # data in the appropriate field. Total Recall™ will search the field for the container. If the container is located in inventory, the record will display on the screen and a window will display prompting the user: ‘Do you wish to save this record?’ to save the record and add the line to the work order. If the data entered into this field exactly matches more than one record, the following message prompt will display: ‘More than one match was found for the specified criteria xxxxxxx… Do you wish to view the matches now?’ Click `<Yes>` to view, then select the appropriate container.

**View List**
Displays the list of containers in Total Recall™ inventory. Containers currently checked out are highlighted in red. Select an item, then right-click to view a menu of available commands.

**Query**
This feature allows for a user to build a query and view the result set. This result set or selected records from the result set can then be exported back to the work order lines. Refer to Chapter 1 - Introduction - Query Builder or the Quick Reference Guide on queries, for more information on this feature.

**Location**
Enter the location where the container was previously stored. The location number identifies the container and should be located on the label on the container. If the location is not known, click on the binoculars icon to search the container inventory screen. When the record is found, highlight the record and click on the `<Select>` button to transfer the information to the work order line. If a T.R. container number or the reference 1 field has been entered to identify the container, the location field will automatically display.
History

After a container has been identified, the container history button to the right of the ‘T.R. Con #’ field will display a print report screen with the selected container number displayed for the user to quickly view the history of the container. This report can be displayed on the screen or can be printed.

Charge To Dept

If the customer is a departmentalized customer, this field is used for entering the department for which the container removal is to be charged. Total Recall will automatically default to the department associated with the container but it can be changed if a different department is to be charged.

Check Out To

This field should reflect the name of the person requesting the removal of the container. If a ‘Request By’ person was entered in the work order header, this name will automatically display in this field. This name can be changed. The names that appear in this drop down are those that appear in the security ‘tab’ of the customer maintenance screen for the selected customer.

Billing Ref

This field allows the user to enter a billing reference to be associated with the work order Line.

Billing Details

Do Not Use Default Activity Code

If default activity codes have been set up in Total Recall, and the activity code displayed is not to be used, check this box and overwrite the activity code, with the activity code to be used.

Activity Code

This field refers to the removal of the container and the charges associated with this service. This is a walk-a-long field for easy entry of the appropriate activity code. To view a list of the available activity codes, click on the down arrow to the right of the field, the selection can be highlighted and selected by double clicking with the mouse or pressing the [ENTER] key. Note: If a priority code was entered on the work order header and default service codes have been setup, this default service code will automatically be displayed in this field when the container for retrieval has been selected. To enter an activity code other than the code automatically selected click on the ‘Do Not Use Default Activity Code’ and enter the alternate activity code.
Transport

Use this field to enter a line transportation code associated with this container removal if there are any to be associated. This is a walk-a-long field for easy entry of the appropriate code. Note: Depending on the transportation setup (if any) in the customer maintenance screen, this field may be automatically entered. Refer to Chapter 5 – Maintenance – Customers – Minimum Transportation Settings or the Quick Reference Guide titled ‘Automatic Transportation Options’, for information on automating the transportation charges.

Misc. Codes

Enter up to four (4) miscellaneous codes for each work order line. These fields are used to charge for services performed in conjunction with removing the container. Click on the down arrow key to the right of this field to view the available service code choices. This is a walk-a-long field for easy entry. The codes displayed here are those with category ‘9’ miscellaneous codes; or a category of ‘4’ – storage codes; or category ‘5’ transportation codes, to allow for multiple transportation charges to be entered. When a code has been entered, a quantity must be entered otherwise Total Recall will automatically assume a quantity of 1. Note: Refer to Chapter 5 – Master or Customer Service Codes for additional information on adding additional service codes.

Special Options

Date Out

This is the date the container will be removed. Total Recall™ will calculate and insert a date based on System Parameters, but the date can be modified, if necessary.

Print Label?

Enter a “Y” to set the ‘flag’ to have a label printed for the selected container. The labels are printed from either the work order screen via the <Labels> button or from the operational reports menu – file labels for open work orders report using the information that has been flagged.

Phone

The phone number associated with the Customer or the person making the request for service.

Container Information

Storage Code

These fields display from the container information stored in the Total Recall™ database.

Container Dept

This field will display the department associated with the container from the inventory record. If there is not a department associated with the container, this field will display as blank.

Cubic Ft

When a container is selected the cubic feet associated with the container in inventory will display. If the cubic foot field has not been previously entered, this field will display blank.
Desc. This field will display the container description from the inventory record, once the container has been identified.

Reference Fields When the container is selected the inventory record will display the information from these fields in the inventory record. Note: If the reference fields for the customer have been customized they will reflect as the customized caption and not as ‘Ref 1/2/3’.
Remove File  This function is used to permanently remove an indexed item from a container. When an item is removed from a container, Total Recall requires much of the same information as when an item is temporarily retrieved. Once a work order with a permanent removal has been closed, the inventory record associated with this indexed item is removed from the active indexed item listing and moved to the permanent removal inventory.

Fig. 3.16 displays when the <Remove File> button is selected followed by a table detailing the fields on the screen.

**Remove File window**

![Permanent Retrieval Screen for Client ABC123 - Permanently Withdraw An Item In A Container](image)

**Current Location** Displays the current location of the item to be removed.

**Line #** This field displays the number of the current line displayed on the screen. This number is incremented every time a <Save> is engaged. The number of saved lines on the current work order is one less than what is displayed in the <Line #> field.
Search Options

These fields allows a user to quickly locate a item if the information contained in either field is known and this information is unique for the customer. First, enter any additional charges and contact information and then enter the TR Item Barcode # or Ref 1 # data in the appropriate field. Total Recall™ will search the field for the item. If the item is located in inventory, the record will display on the screen and a window will display prompting the user: ‘Do you wish to save this record?’ to save the record and add the line to the work order. If the data entered into this field exactly matches more than one record, the following message prompt will display: ‘More than one match was found for the specified criteria xxxxxxx… Do you wish to view the matches now?’ Click <Yes> to view, then select the appropriate container.

View List

Displays the list in Total Recall™ inventory. Item currently checked out are highlighted in red. Select an item, then right-click to view a menu of available commands.

Query

This feature allows for a user to build a query and view the result set. This result set or selected records from the result set can then be exported back to the work order lines. Refer to Chapter 1 - Introduction - Query Builder or the Quick Reference Guide on queries, for more information on this feature.

Location

Enter the location where the item was previously stored. The location number identifies the container and should be located on the label on the container. If the location is not known, click on the binoculars icon to search the container inventory screen. When the record is found, highlight the record and click on the <Select> button to transfer the information to the work order line. If a T.R. item number or the reference 1 field has been entered to identify the container, the location field will automatically display.

History

After a item has been identified, the item history button to the right of the ‘T.R. Barcode #’ field will display a print report screen with the selected item number displayed for the user to quickly view the history of the item. This report can be displayed on the screen or can be printed.
**Charge To Dept** If the customer is a departmentalized customer, this field is used for entering the department for which the item removal is to be charged. Total Recall will automatically default to the department associated with the item but it can be changed if a different department is to be charged.

**Check Out To** This field should reflect the name of the person requesting the removal of the item. If a ‘Request By’ person was entered in the work order header, this name will automatically display in this field. This name can be changed. The names that appear in this drop down are those that appear in the security ‘tab’ of the customer maintenance screen for the selected customer.

**Billing Ref** This field allows the user to enter a billing reference to be associated with the work order Line.

**Billing Details**

**Do Not Use Default Activity Code** If default activity codes have been set up in Total Recall, and the activity code displayed is not to be used, check this box and overwrite the activity code, with the activity code to be used.

**Activity Code** This field refers to the removal of the item and the charges associated with this service. This is a walk-a-long field for easy entry of the appropriate activity code. To view a list of the available activity codes, click on the down arrow to the right of the field, the selection can be highlighted and selected by double clicking with the mouse or pressing the [ENTER] key. Note: If a priority code was entered on the work order header and default service codes have been setup, this default service code will automatically be displayed in this field when the container for retrieval has been selected. To enter an activity code other than the code automatically selected click on the ‘Do Not Use Default Activity Code’ and enter the alternate activity code.

**Transport** Use this field to enter a line transportation code associated with this item removal if there are any to be associated. This is a walk-a-long field for easy entry of the appropriate code. Note: Depending on the transportation setup (if any) in the customer maintenance screen, this field may be automatically entered. Refer to Chapter 5 – Maintenance – Customers – Minimum Transportation Settings or the Quick Reference Guide titled ‘Automatic Transportation Options’, for information on automating the transportation charges.
Misc. Codes Enter up to four (4) miscellaneous codes for each work order line. These fields are used to charge for services performed in conjunction with removing the item. Click on the down arrow key to the right of this field to view the available service code choices. This is a walk-a-long field for easy entry. The codes displayed here are those with category ‘9’ miscellaneous codes; or a category of ‘4’ – storage codes; or category ‘5’ transportation codes, to allow for multiple transportation charges to be entered. When a code has been entered, a quantity must be entered otherwise Total Recall will automatically assume a quantity of 1. Note: Refer to Chapter 5 – Master or Customer Service Codes for additional information on adding additional service codes.

Special Options

Date Out This is the date the item will be removed. Total Recall™ will calculate and insert a date based on System Parameters, but the date can be modified, if necessary.

Print Label? Enter a “Y” to set the ‘flag’ to have a label printed for the selected item. The labels are printed from either the work order screen via the <Labels> button or from the operational reports menu – file labels for open work orders report using the information that has been flagged.

Phone The phone number associated with the Customer or the person making the request for service.

Item Information

Item Dept This field will display the department associated with the item from the inventory record. If there is not a department associated with the item, this field will display as blank.

Desc. This field will display the item description from the inventory record, once the item has been identified.

Reference Fields When the item is selected the inventory record will display the information from these fields in the inventory record. Note: If the reference fields for the customer have been customized they will reflect as the customized caption and not as ‘Ref 1/2/3’.
**Other**  This function button is used to add additional charges or miscellaneous services to a work order that are not represented on any of the other function buttons, but are requested by a customer and need to be processed on a work order. These services may include a work order pick up requests and material sales.

The screen below displays when the `<Other>` button is selected. All fields on this screen are optional. Enter only necessary data in the fields provided. These fields are detailed in the table immediately following.

**‘Other’ Screen**

![Input Other Work Order Line](image)

**Fig. 3.17**

**Line #**  This field displays the number of the current work order line displayed on the screen. This number is incremented every time a `<Save>` is engaged. The number of lines currently added to the work order is one less than what is displayed in the `<Line #>` field.

**Department**  If the service being performed or the miscellaneous charge being assessed is to be assigned to a department, that department must be entered. This line cannot be saved if the customer has been set as ‘department required’, until a department has been selected. This is a walk-a-long field for easy entry, click on the arrow to the right of the field to view a listing of the available departments.

**Person**  Enter the name of the person requesting this service.

**Transport**  This field is to enter a transportation charge associated with the work order line. Click on down arrow to view a listing of available
transportation codes. This is a walk-a-long field for easy entry. The codes that appear in this drop down menu are those entered with a category code of a ‘5’ in the master or customer service code listings.  

*Note: Refer to Chapter 5 – Maintenance – Customers – Minimum Transportation Settings or the Quick Reference Guide titled ‘Automatic Transportation Options’, for information on the transportation requirement codes.*

**Billing Ref**  
This field is for the user to enter a billing reference if one is needed for the customer.

**Service Codes**  
Enter up to four (4) miscellaneous service codes for each work order line. These fields are used to charge a customer for miscellaneous services performed or for product sales. Click on the down arrow key to the right of this field to view the available miscellaneous code choices. This is a walk-a-long field for easy entry. All service codes appear in these fields. When a code is selected, the code description is displayed to the right. A quantity field is to the right of this field. If no quantity is entered, Total Recall will assume a quantity of one (1). *Refer to Chapter 5 - Master or Customer Service Codes for additional information on adding miscellaneous service codes.*

**Custom Billing Item**  
This field allows the user to create a custom billing line, enter a price and a quantity. This is often used to enter a request for a container or file pick up with no billing attached. It also allows for billing of miscellaneous billing for products or services out of the ordinary. Any entry in this field will display on the invoice just as it is entered in this field, providing a price has been entered in the *Price Each* field.

**Price Each**  
If a custom billing item has been entered and a price is to be associated with this line, enter the price for each in this field.

**Quantity**  
If a custom billing item and a price has been entered, enter a quantity in this field. If the quantity field is left blank, this item will NOT bill.

**Tax Rate**  
If a custom billing item has been entered along with an item price and tax is to be added to the total, enter the tax rate in this field. *Note: This field will only display if the customer has been marked ‘taxable’.*

**GL Account**  
If a custom billing item has been entered along with an item price and a general ledger account needs to be associated with the item, enter the general ledger number in this field.
Location Fixed Allocation – If the service that is being billed relates to a container, enter the unique location for the container in this field. Total Recall will then display the Total Recall container number associated with this location. If the Total Recall container number is known this can be entered and the location will display. Click on the binoculars to search the container inventory. From the inventory screen the <Select> button can be clicked and the container information will be transferred to the other input screen.

Dynamic Allocation – If the service relates to a container, enter the Total Recall container number and the location will automatically display. Click on the binoculars to search the container inventory. From the inventory screen the <Select> button can be clicked and the container information will be transferred to the other input screen.

T.R. Con Fixed Allocation – When the unique location has been entered in the <Location> Field, the Total Recall container number will display. The user also has the option to enter the Total Recall container number and the location of that container will display.

Dynamic Allocation – Enter the unique Total Recall container number to identify the container. If the Total Recall container number is not known the user can click on the binoculars and search the container inventory. When the container is highlighted, clicking the <Select> button transfers the inventory information to the other input screen.

Item ID Fixed Storage – If the service to be charged relates to an indexed item, enter into this field the unique item ID for this item. Total Recall will automatically display the location of the container, the Total Recall container number and the Total Recall item number.

Dynamic Allocation – If the service to be charged relates to an indexed item, this field will automatically default to the information contained within this field, if any, in the indexed item inventory record when the Total Recall item number has been entered.

T.R. Item # Fixed Storage – This number automatically defaults to the unique Total Recall item number when the item ID has been entered. This number can also be entered to identify the indexed item.

Dynamic Allocation – Enter the unique Total Recall item number and Total Recall will display the respective Total Recall container number and location of the container.
Container History

**Desc.** When a container has been identified, the information that resides in the container description field from the inventory record displays in this field.

**Reference Fields** When a container has been identified and selected, any information residing in the first three (3) reference fields of the inventory record will display in these reference fields. *Note: If the reference fields for the customer have been customized they will reflect as the customized caption and not as ‘reference x’.*

**Storage Code** This field will display the storage code associated with the container from the inventory record.

**Container Status** If the selected Container currently displays a ‘Retrieved’ Status, this field will display “OUT”. Otherwise, the status will display as “IN”.

**File/Item Status** If the selected Indexed Item is currently displays a ‘Retrieved’ Status, this field will display “OUT”. Otherwise, the status will display as “IN”.
Relocate

The user can relocate a container or an indexed item using the <Relocate> button. Fig. 3.18 below displays when the <Relocate> button is selected and the indexed item radio button is clicked. The <Container> radio button is the default for this relocation screen.

To relocate an indexed item, click the <Indexed Item> radio button. The Total Recall item number and the item description fields will display.

To relocate a container, the <Container> radio button must be selected. To relocate an indexed item, click on the <Indexed Item> radio button. The fields on this screen are detailed below and on the following pages.

**Line #**  This field displays the number of the current work order line displayed on the screen. This number is incremented every time a <Save> is engaged. The number of lines currently added to the work order is one less than what is displayed in the <Line #> field.

**Activity Code**  This field refers to the relocation of either a container or an indexed item within a container. Click on the down arrow key to the right of this field to view the available activity code choices. The choices that appear here are those that were set up with a category code of ‘7’ on the master or customer service code screens. This is a walk-a-long field for easy entry, click on the arrow to the right of the field to view a listing of the available relocation service codes.
Do Not Verify Location  
**Fixed Storage** – When a container is relocated in inventory and the new location has been entered manually, Total Recall will **NOT** verify the availability of the new location with this option selected. Total Recall will only verify that the container is currently in inventory. Without this option selected, Total Recall will verify the new location. A check mark in this box will enable the ‘Do Not Verify’ feature. No check mark disables this feature.

Relocate From Location  
**Fixed Storage** – Enter the unique location address where the container is currently stored. If the current location address is not known click on the binoculars to the right of the location field to search the container inventory and select the container to be relocated. If you are relocating an indexed item and the unique item ID or Total Recall item number is entered, the current location will automatically display.

**Dynamic Allocation** – This field will automatically default to the location address where the container is currently stored when the unique Total Recall container number (for a container relocate) or the unique Total Recall item number (for an indexed item relocate) has been identified.

Relocate From T.R. Con #  
**Fixed Storage** – The Total Recall container number will be displayed once the location has been entered or the item ID if relocating an indexed item. This field can be used to identify the container number for container relocation.

**Dynamic Allocation** – For container relocation, enter the Total Recall Container number in this field and Total Recall will display the current location. For an indexed item, enter the Total Recall item number and the Total Recall container number will automatically display. If the Total Recall container number or Total Recall item number is not known, click on the binoculars to the right of either of the appropriate fields to search. The corresponding inventory listing for the record to be relocated and the location of the container will display.

Container Description  
After the container has been identified the information from the description field in the inventory record of the container will display in this field.
**Item ID**  
*Note: This field will only display if the indexed item radio button has been previously selected.*

**Fixed Storage** – The unique item ID can be entered along with the container location to identify the indexed item to be relocated. Click on the binoculars to the right of this field to search the indexed item inventory for the Item to be relocated. When the item is located, click the *Select* button in the navigation tool bar at the bottom of the inventory screen and paste this record into the relocate screen.

**Dynamic Allocation** – This field will display the information contained within this field from the inventory record for the selected indexed item when the indexed item has been identified.

**Relocate From T.R. Item #**  
*Note: This Field will only display if the indexed item radio button has been previously selected.*

**Fixed Storage** – The Total Recall item number will be displayed once the unique item ID and container location has been entered or the item has been selected from inventory. This number can also be entered in to identify the indexed item.

**Dynamic Allocation** – For indexed item relocation, enter the Total Recall item number in this field to identify the item to be relocated. If the Total Recall item number is not known, click on the binoculars to the right of the field to search the indexed items inventory. With the item highlighted click the *Select* button at the bottom of the inventory screen this will paste the item into the relocated screen.

**Relocate From Item Desc.**  
*Note: This field will only display if the indexed item radio button has been previously selected.*

When an item has been selected for relocation, the information contained in the description field of the inventory record, if any, for the indexed item will display in this field.
**Relocate To Location**

**Fixed Storage** – Enter the location address where the container is to be relocated. If a new location is to be selected from the listing of current available relocations, click on the binoculars to the right of the location field to search the available locations listing. Note: *If the new location is not to be verified as a valid location, be sure to check the box <Do Not Verify Location> prior to entering the new location.*

**Dynamic Allocation** – Enter into this field the new location where the container will be relocated.

**Relocate To T.R. Con #**

If an indexed item is being relocated to a different container, enter the new Total Recall container number in this field.

**Charge to Dept**

If the container or item selected for relocation is associated with a department in inventory, this department will display in this field. Usually the relocation option is not a chargeable service. In the case that this service is being charged and the account is billed by department, enter the department to which this service is to be charged. This is a walk-a-long field for easy entry, click on the arrow to the right of the field to view a listing of the available departments.

**Misc. Codes**

Enter up to four (4) miscellaneous codes for each work order line. These fields are used to charge for services performed in conjunction with relocation of the container or indexed item. Click on the down arrow key to the right of this field to view the available service code choices. This is a walk-a-long field for easy entry. The codes displayed here are those with a category ‘9’ miscellaneous codes; or a category of ‘4’ – storage codes; or a category ‘5’ transportation codes, to allow for multiple transportation charges to be entered. When a code has been entered, a ‘quantity’ must be entered otherwise Total Recall will automatically assume a quantity of 1. Note: *Refer to Chapter 5 – Master or Customer Service Codes for additional information on adding additional service codes.*

**Print Label**

A ‘Y’ or ‘N’ is the only two valid responses for this field. Entering a ‘Y’ in this field will flag the record to print a label for this container or indexed item. The labels are printed from the work order input screen, <Labels> button.
The Fungible Module

The fungible module allows a record center to track quantities of items within containers and distribute accordingly. This is used for record centers that store items such as forms or brochures for customers that only want to request a portion of the stock within a container at any one time.

Additional service codes will need to be set up for these customers for activity involved with the adding of containers with stock; the retrieving of stock; and the refilling of stock.

Work orders are created in much the same way as with other activities performed in Total Recall with the exception of entering the quantity of items being added to inventory or the quantity of items being retrieved from inventory.

The following pages detail the functionality of the fungible module.

### Adding Containers with Like Item Stock

Work orders must be created to track the container and the quantity of items within the container. From the work order input screen, after the header information has been completed, click on the `<Add Container>` button or the lightning bolt to the right of the `<Add Container>` button to access the appropriate screen for entry. Enter data pertaining to the container and contents. Enter the total quantity of stock received in the ‘Quantity’ field. This then becomes the container stock. When containers have been entered, and charges assessed, close the work order to add the container(s) with the stock to inventory. Note: If container contents are not all like products, add the container to inventory and then add items to the container as you would add indexed items to a container. The quantities would be added to the items within the container and not to the container itself. These containers would then contain item stock and not container stock.

If several containers are received with all like items and all containers will be stored together, you may want to enter as one container with a single total quantity for reporting purposes.

Note: If reorder points are to be tracked, set up the reference three (3) field as the field to enter this information. Reports can then be printed showing current quantities and the reorder points and whether stock needs to be reordered.

When the work order is closed the container will be added to inventory and the current quantity will display in the inventory record.
Adding Containers with Non-Like Item Stock

From the work order input screen, after the header information has been completed, click on the <Add Container> button or the lightning bolt to the right of the <Add Container> button to access the appropriate screen for entry. Enter data pertaining to the container. Do NOT enter a quantity in the ‘Quantity’ field. Quantities are to be added to the items stored within the container. After the containers have been added, the items can be added much like adding indexed items to a container. Click on the <Add File> button or the lightning bolt to the right of the <Add File> button to access the appropriate screen for entry. Enter data pertaining to the non-like item stock and enter a quantity in the ‘Quantity’ field on the add item to container screen. Closing the work order will add the containers and the items with stock to current inventory. Note: Containers and items do not have to be added on the same work order, containers can be scanned into inventory or added on a separate work order, but must be in inventory before items can be added.

Note: If reorder points are to be tracked, set up the reference three (3) field as the field to enter this information. Reports can then be printed showing current quantities and the reorder points and whether stock needs to be reordered.

When the work order is closed the items will show in inventory with the available quantity.

Retrieving Item Quantities From Like Item Stock Containers

When item quantities are requested from container stock, create a work order for the request. Click on the <Retrieve Container> button after the work order header has been saved. Enter an activity code associated with retrieval of stock and select the container where the stock is currently stored by entering the Total Recall container number in the appropriate field, Enter the reference 1 information into the reference 1 special search field or search the inventory and select the container. Enter any additional charges associated with the stock retrieval. In the lower left portion of the screen, check the box ‘Retrieve Fungible Items from the Container’. The current stock quantity will display to the right in a field titled ‘Qty Available’. Enter the quantity to be retrieved in the ‘Qty’ field.

Note: If the reference 1 special search is used to identify the container, when the container is located and the system prompts the user: ‘Do you wish to save this record?’, the user must reply <NO>. This will then allow the user to enter the quantity of stock to be retrieved prior to saving the work order line.
When the work order is closed, the quantity will be adjusted and reflect the new available quantity in the inventory record.

**Retrieving Item Quantities From Non-Like Item Stock Containers**

When item quantities are requested from container stock containing more than one type of item stock within a container, create a work order for the request. Click on the `<Retrieve File>` button after the work order header has been saved. Enter an activity code associated with retrieval of stock and select the item associated with the stock to be retrieved. This can be done by entering the Total Recall item number in the Total Recall item number field; using the reference 1 search field or searching the inventory and selecting the item. Enter any additional charges associated with the item stock retrieval. In the lower left portion of the screen, check the box ‘Retrieve Fungible Items from the Container’. The current stock quantity will display to the right in a field titled ‘Qty Available’. Enter the quantity to be retrieved in the ‘Qty’ field.

*Note: If the reference 1 special search is used to identify the item, when the item is located and the system prompts the user: ‘Do you wish to save this record?’, the user must reply <NO>. This will then allow the user to enter the quantity of stock to be retrieved prior to saving the work order line.*

When the work order is closed, the quantity will be updated.

**Refilling Containers With Like Item Stock**

Work orders must be created to add stock to an existing container. From the work order input screen, after the header information has been completed, click on the `<Re-file Container>` button to access the appropriate screen for entry. Enter an activity code associated with adding stock to an existing container. This can be done by entering the T.R. container number in the T.R. container number field; using the reference 1 search field; or searching the inventory and selecting the container. Enter any additional charges associated with the item stock addition. In the lower left portion of the screen, check the box ‘Add Fungible Items to the Container’. The current stock quantity will display to the right in a field titled ‘Current Qty’. Enter the quantity to be added in the ‘Qty’ field.

*Note: If the reference 1 special search is used to identify the container, when the container is located and the system prompts the user: ‘Do you wish to save this record?’, the user must reply <NO>. This will then allow the user to enter the quantity of stock to be retrieved prior to saving the work order line.*

After the work order has been closed, the quantity will be updated.
Refilling Containers With Non-Like Item Stock

Work orders must be created to add stock to non-like items stored in the same container. From the work order input screen, after the header information has been completed, click on the <Re-file File> button to access the appropriate screen for entry. Enter an activity code associated with adding stock to an existing item within a container. This can be done by entering the T.R. item number in the T.R. item number field; using the reference 1 search field; or searching the inventory and selecting the item. Enter any additional charges associated with the item stock addition. In the lower left portion of the screen, check the box <Add Fungible Items to the Container>. The current stock quantity will display to the right in a field titled ‘Current Qty’. Enter the quantity to be added in the ‘Qty’ field. Once the work order is closed, the quantity will be updated.

Note: If the reference 1 special search is used to identify the item, when the item is located and the system prompts the user: ‘Do you wish to save this record?’ The user must reply <NO>. This will then allow the user to enter the quantity of stock to be retrieved prior to saving the work order line.

When the work order is closed, the quantity will be adjusted and reflect the new available quantity in the indexed item inventory record.
Utility Buttons

Edit Line # This field allows a user to type in a work order line number. Pressing [ENTER] on the keyboard will display the work order line on the screen. If the work order is open the user can edit any information on the screen. If the work order is closed the user can view all information contained on the screen and edit any billing charges or add additional billing charges using the miscellaneous code fields. The department field and the reference one field on the adding a container screen can be edited after a work order is closed and inventory is updated immediately. Other changes to inventory must be made through the maintenance or inquiry menus.

From this screen the user can then use the <Previous> and <Next> buttons at the bottom of the screen to page through additional work order lines.

Labels This button allows the user to print either container or file labels corresponding to the work order lines. The print label flag must be activated for this feature to work. To quickly activate or deactivate a print label flag, place your cursor in the PL column of the work order input screen and right click with your mouse, the flag will toggle between “Y” for Yes and “N” for No. Labels can be printed from either an open or closed work order. The window Fig. 3.19 displays when the <Labels> button is selected.

Print Labels Screen

Select to print either container or file labels by clicking the <Container Labels> or <File Labels> button and then click the <Print> button.
Depending on whether the container or file label button was previously selected, an input screen similar to the one below will display. Fig. 3.20 shows the print file label screen.

![Print File Label Screen](image)

The user will select parameters to print labels. The parameter screen is the similar for both types of labels. It is recommended that defaults be set for the labels and reports. With the defaults set the user will simply click the <OK> button, select the printer and print the labels. See Chapter 10 - System Menu – Report Defaults, for information on setting report defaults.

Select the type of bar code labels to be printed:
Select the label version to be printed:

**Standard Label** – Will print either version A, B, C or D depending upon what has been previously set up for the individual record center.

**Bar Code Labels** – Will print version 'A' only.

Select the label output format:

**Preview** – To preview the labels on the computer screen, click the <Preview> button. Note: If a label printer is being used, often times a barcode will not preview on the screen, instead there will be a series of symbols where the barcode will print.
**Print** – To send the labels directly to the printer, click on the `<Printer>` button.

**File** – To send the label format to a file, click the `<File>` button. This feature is for standard labels only.

Click the `<Print>` button to initiate the label print or the `<Exit>` button to close the label print screen without printing labels. After the `<Print>` button has been clicked, if the labels are being sent to a printer, the Windows print screen will display allowing the user the option to select a printer other than the default printer. Click the `<OK>` button to initiate the print function.

When the labels have been printed, Total Recall will prompt the user: ‘Do you Wish to Clear Print Label Flags for these Work Orders?’ If the labels have printed correctly, click the `<Yes>` button and the PL column will be cleared, click `<No>` to allow for the labels to be printed again.
Edit Work Order Line

This button allows a user to modify a work order line. Select a line to be modified by highlighting the line in the grid area. Click the edit work order line button. If the work order is open the user can edit any information on the screen. If the work order is closed the user can view all information contained on the screen and edit billing charges or add additional billing charges using the miscellaneous code fields. The department field and the reference 1 field on the adding a container screen can be edited after a work order is closed and inventory is updated immediately. Other changes to inventory must be made through the maintenance or inquiry menus.

From this screen the user can then use the <Previous> and <Next> buttons at the bottom of the screen to page through additional work order lines.

Delete Work Order Line

This button allows a user to delete one line from the selected work order. Highlight a line in the grid area of the work order to be deleted and click the delete work order line button. After this button has been clicked, a dialog box will display: ‘Delete Work Order Line xxxx?’ Click <Yes> to delete the line or click <No> to cancel the deletion and return to the work order input screen. This button is only active when a work order has an open status. Once a work order has been closed, lines CANNOT be deleted. Note: The delete button in the navigational toolbar will delete the entire work order. This smaller button will allow the user to delete individual lines from the work order.

Verify

This feature allows the user to verify containers or files prior to sending them to a customer to assure that the correct items are being sent to the customer. Click the <Verify> button to enter the verify mode. The screen on Fig. 3.21 shows a work order screen in the verify mode.
To use the verify feature, the user selects the field to verify from those listed to the right of ‘Verify Using’ field. The Total Recall container or item number, the location (for fixed allocation only), the description, or one of the first four reference fields.

The user can verify by entering data manually into the ‘Find’ field or by using a keyboard wedge that is attached to the back of the computer. As items on the work order are verified the letter ‘V’ appears in the status ‘S’ column of the work order lines.

The user can elect to <Hide Verified Items>, if this option is selected, as the lines are verified they will be hidden from view, but can be brought back to the screen by selecting <Show Verified Items>.

Only open work order lines can be verified. If work order lines have been closed, Total Recall will prompt the user with the following message: ‘The WO line has already been closed. You cannot verify lines that have been closed.’
Manual Entry
Select the field to be used for verification and click the radio button to the left of the ‘Verify Using’ field. If the cursor is to be locked in the ‘Find’ field, click the ‘Lock Cursor’ checkbox to the right of this field and the cursor will display in the ‘Find’ field and will be locked into this field. This checkbox will need to be de-selected to use the mouse to make any other selections or to exit the verify mode.

With the cursor in the ‘Find’ field, enter the data contained in the current inventory record for the field selected. If the data matches a record on the work order a ‘V’ will display in the status ‘S’ column to indicate that line has been verified. Note: If you are using the Total Recall item number to verify files retrieved, you must first enter the letter ‘F’ followed by the Total Recall file number – zeros between the letter ‘F’ and the tracking number do not need to be entered. If the file number is a designated length (the length must be specified in the system parameters screen), simply enter the file number including any preceding zeros if the number is not the designated length. If information is entered that does not match any work order line, the user will receive a prompt: ‘Item Not Found on Work Order’, click <OK> and verify that you accurately typed the data into the ‘Find’ field or re-type the data. If a match is still not found then place that item to the side. This item is not on the work order and should not be sent to the customer.

To re-verify the work order, click on the <Reset> button and a message prompt will display: ‘Do you wish to reset all work order lines to a status of not verified?’ Click <Yes> to reset all lines on the current work order. Click <No> to leave the work order line status at their current status.

Keyboard Wedge
Select the field to be used for verification (this must be a bar coded field). Click the radio button to the left of the field title in the ‘Verify Using:’ field. If the cursor is to be locked in the ‘Find’ field, click the checkbox to the right of the ‘Find’ field and the cursor will display in this field and will be locked in this field. This checkbox will need to be de-selected to use the mouse to make any other selections or to exit the verify mode.
With the cursor in the `<Find>` field, use the electronic Keyboard Wedge to scan the bar coded information on the label of the container or file being retrieved. If the scanned data matches a record on the work order a ‘V’ will display in the status ‘S’ column to indicate that line has been verified.

If information is scanned that does not match any work order line, the user will receive a prompt: ‘Item Not Found on Work Order’. Click `<OK>` and re-scan. If a match is still not found then place that item to the side. This item is not on the current work order and should not be sent to the customer.

To re-verify the work order, click on the `<Reset>` button and a message prompt will display: ‘Do you wish to reset all work order lines to a status of not verified?’ Click `<Yes>` to reset all lines on the current work order. Click `<No>` to leave the work order line status at their current status.

| Hide Verified Items | This option allows for the user to only view the items on the work order that have NOT been verified. As work order lines are verified and the line status updated to ‘Verified’ the line is hidden from view. The only lines that will display on the work order are those that have not yet been verified. This feature can be activated as the verification process is started; can be selected during the verification process or after verification to see if any lines remain being un-verified. Note: When this button is clicked, the button title changes to: ‘Show Verified Items’. |
| Show Verified Items | This option is only available after the `<Hide Verified Items>` button has been selected. This button allows the user to click and view all lines on the work order, regardless of the verified status. |
| Clear | This option deletes the work order lines that were NOT verified. When the `<Clear>` button is clicked, the user is prompted: ‘Do you wish to delete the x work order line(s) which are not verified?’ The user will click `<Yes>` to delete all unverified lines or `<No>` to keep all unverified lines. |
| Reset | This feature allows the user to re-verify the work order. Click on the `<Reset>` button and a message prompt will display: ‘Do you wish to reset all work order lines to a status of not verified?’ Click `<Yes>` to reset all lines on the current work order. Click `<No>` to leave the work order line status at their current status. |
| Exit Verify Mode | Click the `<Exit Verify Mode>` button to return to the work order input screen. |
Double Key  Total Recall allows for double key entry on all of the reference fields for containers and all the reference fields plus the item ID for the indexed items. This feature will validate the accuracy of information entered into specified fields. After a work order has been entered and lines have been added to add containers or indexed items, prior to the work order being closed, click on the <Verify> button and from the verify screen, click on the <Double Key> button. A screen similar to Fig. 3.22 displays.

Verify Screen

As lines are double keyed successfully, the line status will display as ‘V’ for verified.

Select the method to verify the accuracy of the data entry: By Order or By Seek. The next pages detail the difference between these two methodologies.

By Order  This feature will verify the accuracy of the data entry in the same order in which the data was entered beginning with work order line 1, or the first work order line not previously verified. Select the field(s) to be double keyed by checking the box to the right of the reference field(s), this will enable the field(s).
Click in the first field to be double keyed and key in the data for verification, press [ENTER]. If the data matches exactly what was entered on the work order line, the cursor will proceed to the next line field to be verified. If only one field is to be verified or when all fields have been verified accurately, the focus will be on the <Next> button, press the [ENTER] button and the focus will be back to the first field for verification entry.

If the data entered into any field does not exactly match what was entered on the work order line, a message window will prompt the user: ‘The Value In Ref x = xxxxx on WO Line # mnnn. Would You Like To Change the Ref 1 Value to yyyyyy’. A <Yes> response will change the value of the reference field indicated to what was entered in the double key mode, a <No> response will allow for re-entry of a valid match.

When all work order lines have been validated a message will display ‘There Are No More Lines to Validate on This Work Order!’ Click the <OK> button and then click the <Close> button. As lines are validated they will be hidden from view, exiting the verify mode will display all work order lines.

**Seek All**

This option will seek out the data entered to find a match in the appropriate field(s). Select the field(s) to be double keyed by checking the box to the right of the reference field to be double keyed. This will enable the field for entry.

Click in the first field to be double keyed and enter the data to be checked for accuracy, if additional fields are to be double keyed, press [ENTER] and continue entering data until all selected field have been keyed. Press [ENTER] and the program will verify the information. If a work order line matches the data entered, that line will be verified and the focus moves back to the first field for the next record to be entered.

If any field of data that was double keyed does not match exactly any line on the work order, a window will display prompting the user: ‘No Matches Found’. Click <OK> and verify the data as entered. If the double key screen is accurate, the user can continue with the double key and check the work order line upon completion. This work order line will not validate.

When all work order lines have been validated a message will display ‘There Are No More Lines to Validate on This Work Order!’ Click the <OK> button and then click the <Close> button. As lines are validated they will be hidden from view. Any line still displaying on the work order has data that did not validate, double click this work order line to correct data. Exiting the verify mode will display all work order lines.
Exit Verify Mode

To cancel the verify mode and return to the work order input screen, click the <EXIT VERIFY MODE> button.

Close Work Order

The <Close Work Order> button completes the work order process and updates the inventory. Once a work order has been closed it cannot be re-opened and lines cannot be deleted. Work order lines can be viewed, and billing fields along with the department and reference 1 field for adding containers are editable. A work order and labels can be printed regardless of whether a work order is opened or closed. When a user selects the <Close Work Order> button a window similar to the one in Fig. 3.23 will display. Note: Work order lines can be added to a closed work order and then the work order can be re-closed, this feature can be disabled for individual users on the System Menu – Security – Add/Edit Individual Security Settings.

Fig. 3.23

The <Completed By> field displays the user that is currently logged into Total Recall. This can be modified if the person closing the work orders is not the person currently logged into Total Recall. The current date and time is displayed and will be logged into the audit area of the work order record.

To track statistics on employees; enter the person’s name who performed the work on the work order – (i.e. if a retrieval, the person pulling the records; if data entry, the person entering the records).

To close the work order the user must click on the <Close WO> button. Click the <Cancel> button to exit the close work order screen and return to the work order input screen. Remember, once a work order has been closed work order cannot be re-opened.
Audit Report

The audit report details all charges on the work order. Click the <Audit Report> button and a print screen will display allowing the user to preview the report on the computer screen or send it to a printer. All charges pertaining to the currently displayed work order except recurring storage will be detailed. If the work order audit report is accurate, the billing for the work order will be accurate. It is highly advisable to preview to the computer screen or send to the printer the audit report and have verify charges for each work order that is created. If audit reports are verified for each work order created and they are accurate, month end billing will be accurate.

Export Work Order

This feature exports the currently selected work order and closes out the work order. This feature works in conjunction with other Total Recall products that your customer may have installed.
The General Tab

The General ‘Tab’ of the work order screen allows the user to select a site other than the default delivery address to be printed on the work order, select a pre-defined route, enter requisition information, enter special instructions pertaining to the work order, and price the work order. This screen also stores audit information related to the specified work order.

To access this ‘Tab’, click the tab titled ‘General’ directly below the <Mthd>, <Due Date> and <Time> fields. The general tab screen is displayed on Fig. 3.24. The fields on this screen are detailed in the table immediately following.

Go to WO #  To view another work order, enter in the 6-digit work order number in this field, or enter without the preceding zeros and press the [ENTER] button on the keyboard. The work order will display on the screen. If a work order number is entered that is not in the current list of work orders, a system prompt will display: ‘Work Order nnnnnn Not Found!’

Price WO  Click on this button to calculate the price of the current work order prior to the work order being closed. Note: To get a detail of all prices associated with the work order, view or print the work order audit report. When the work order is closed, this field will automatically display the price of the work order at the time it was closed. If billing items are modified or added after the work order has been closed, clicking this button will update the pricing information.
Price  When a user clicks on the <Price WO> button, the work order will calculate the charges associated with the current work order and display the charges, less tax and recurring storage in this field. After the work order has been closed, this information will display automatically.

Cost  If costs are associated with the individual service codes, these costs will be totaled and displayed in this field. Note: See Chapter 5, Maintenance – Service Code Maintenance for information on associating costs with service codes.

Tax  If any of the service codes selected on the current work order have a tax rate associated with them, the calculated tax amount will display in this field.

Lines  This field displays the total number of lines entered on the current work order.

RE #  This button allows for the user to renumber the work order lines. As lines are deleted, they need to be renumbered. Renumbering can occur automatically depending on the number or lines on the work order. See Chapter 10 – System – Parameters – Bar Code/Field Lengths ‘Tab’ to set the number of lines to automatically renumber if the number of lines is less than the number indicated. The program will prompt the user to renumber the work order lines if the number of lines on the work order exceeds the number indicated in the parameters table. If the user declines to renumber, clicking this button will automatically renumber the lines.

ID  This field displays the User ID of the person logged into Total Recall at the time the work order was created. This is a non-editable field.

Created  This field indicates the date in which the work order was created. The time the work order was created displays to the immediate right of the date field. The information for these fields is documented at the time the new work order button is activated. These are non-editable fields.

Updated  This field indicates the last date that the work order was updated. The time the work order was last updated displays to the immediate right of the date field. These are non-editable fields.

Date  When the work order is closed, the system date is logged at the time the work order is closed and will display in this field. This is a non-editable field. Note: If the lines are added to the work order and the work order is re-closed, this field will update with the latest close date information.
**Time**  When the work order is closed, the system time is logged and will display in this field. This is a non-editable field. *Note: If the lines are added to the work order and the work order is re-closed, this field will update with the latest close time information.*

**By**  When the work order is closed, the person whose name appeared in the ‘Completed By’ field on the close work order screen will display in this field. This is usually the person currently logged into Total Recall at the time the work order was closed. This is a non-editable field. *Note: If the lines are added to the work order and the work order is re-closed, this field will update with the latest data entered into the ‘Completed By’ field.*

**Route**  If routes have been set and associated with customers and/or sites, this field will display the route associated with the customer selected in the work order header. If the site address were changed, this route field would update to the route associated with the site. If there is no route associated with the site, the original route will display. If routes were not associated with either the customer or the site selected or if the work order will be sent on a different route, the route can be selected from this screen or left empty.

**Site**  If the work order is to be delivered to an address other than the default delivery address, select the site where the work order is to be delivered. This alternative address will be displayed and will print on the work order. *Note: If the requestor selected on the work order header is associated with as site in the customer maintenance screen, this field will automatically display that site information, but can be modified if necessary.*

**Phone**  If a phone number is associated with the site address selected, this phone number will display in this field.

**Street**  This field will display the street address from the default delivery address on the customer maintenance screen unless a site has been selected or was connected to the requestor selected. If a site is selected the street address for the site will be entered in this field and will print out on the work order.

**City**  This field will display the city from the default delivery address on the customer maintenance screen unless a site has been selected or was connected to the requestor selected. If a site is selected, the city associated with the site address will display here and will print out on the work order.
State This field will display the state from the default delivery address on the customer maintenance screen unless a site has been selected or the requestor selected is connected to a site. If a site is selected, the state associated with the site address will display in this field and will print on the work order.

Zip This field will display the zip code associated from the default delivery address on the customer maintenance screen unless a site has been selected or connected to a site. If a site is selected, the zip code associated with the site address will display in this field and will print on the work order.

Work Performed By This field will display the person’s name, if any was entered when the work order was closed, that performed the work for the work order.

Bill to Dept If you want to apply a department to all work order lines not currently showing a department, select the department from the listing. This is a walk-a-long field for easy entry. Click the button to the right of the bill to department field and a system prompt will display: ‘Do you wish to fill in the Charge to Department with xxxxxx on all WO lines which have a blank Charge to Department?’ Click the <Yes> button to update the charge to department field with the department indicated to the left on all work order lines where the charge to department is blank. Click <No> to leave the charge to department blank and return to the general tab of the work order input screen.

Type This is an optional field and can be used to enter how the invoice will be paid such as purchase order.

Number This field can be used to enter a requisition number if one is required. This field can also be used to indicate the number of items to be picked up on a pick up request if the dispatch module is being used. This number will then display on the add to batch screen for the dispatcher to better manage pick up of items.

Invoice # The invoice number will display in this field when the work order is closed if the parameters are set to create an invoice with each work order as it is closed. See Chapter 5 – Billing Options, for more information on this feature.
Notes  Total Recall allows for notes to be entered for a work order that will print on the work order. These notes are mainly for the benefit of the driver, but can be used as deemed necessary.

This `<Notes>` field will pull any recurring notes that were entered on the customer maintenance screen – defaults tab. *See Chapter 5 – Maintenance – Customer – Individual Records – Default ‘Tab’ for more information on adding recurring notes to a work order.*

This field can be edited if delivery instructions change for the work order, by clicking in the field and appending to or overwriting any recurring notes.

If the field is blank, the user can enter any notes applicable to the work order.
Scanner Functions

**Apex II Portable Barcode Options**
This menu accesses the available commands for the Apex II scanner. Importing Work Order data, Pick lists, and Verify options are launched from this menu and its sub-menus. Chapter Four covers scanners and their related functions.

**Symbol Utilities**
This menu accesses the available commands for the Symbol PDT scanners. Sub menus are present for the PDT 3100 and the PDT 900. Again, Chapter Four covers scanners and their related functions; please refer that chapter for further documentation.
Web Server Functions

The web server functions menu allows users with the web server module the ability to import work orders done at customers locations into Total Recall. The program will check every sixty seconds to see if web orders are pending – when a web order is found a message prompt will display: ‘You have pending Web Service Orders!’ If web orders are pending and no users are currently logged into Total Recall, the first user who logs into Total Recall after an order was sent will receive the above message. A user will click <OK> and depending on company policies, either import the work order or wait until a specified time to import all work orders that have been received. Once the <OK> button has been initiated, the header band at the top of Total Recall will display a message that there are web orders pending along with a date and time of the acknowledgement. This message will remain in the header band until the web orders have been imported.

Select <Web Server Functions> – <Import Web Server Orders> and a window similar to Fig. 3.25 will display.

Prior to the first import of the web server order or if the web server is moved, the user will need to enter the web server data path. The path can be entered into the field or the find file button can be used to navigate to the data path for the Webtr directory. Once the path has been established, this path will be automatically saved. Note: If this path is not accurate, or if the Webtr folder has been moved, the pending work order notification will not activate.
To import web order(s), click on the <Import> button, and the web server work orders will be imported into Total Recall. Upon import, a window will prompt the user: ‘Do you wish to print a list of the web orders that were imported?’ Click <Yes> to print a listing of the work orders that were imported, click <No> to continue without printing a list of the work orders imported.

Total Recall will display a message box advising the user the number of work orders imported. Click <OK> to close this screen.

The user can check the box ‘Auto Print Web Work Orders’ prior to importing the web orders. If this feature is engaged, the work order print screen will display after the acknowledgement of the number of orders imported for the user to begin printing the web work orders. **Note: The ‘Auto Print Web Work Orders’ function can be automatically engaged in the system parameters. See Chapter 10 – Parameters – Bar Code / Field Lengths tab for more information on this feature.**

The work orders can be viewed and/or edited by accessing the File Menu - Edit Work Order – Browse List of Work Orders option. The work orders will have a description of ‘Web Server Import’. A separate work order will be created for each user making a request using the web server. The web work order numbers that are included on the Total Recall work order are listed in the ‘Notes’ section of the general tab.

The work order or pick list can be printed, the containers and/or files pulled and the work order delivered to the customer. If additional billing charges are to be assessed, these will need to be added to the work order on a current line or using the ‘Other’ button to add miscellaneous billing items.
Scheduled Recurring Work Orders

The scheduled recurring work orders feature allows for the record center to create and schedule recurring work orders that occur more often than once a month. These work orders are created one time and can be printed in advance. There are 3 options available. Add new recurring work orders, view list of recurring work orders, and convert recurring work orders to active work orders. The Add New Recurring Work Orders option allows a user to create and schedule a recurring work order. The View List of Recurring Work Orders allows a user to view a listing of all previously created work orders, from this screen the user can open and edit a work order and convert a recurring work order to an active work order. The Convert Recurring Work Orders to Active Work Orders screen allows for a range of recurring work orders to be converted to active work orders.

Add New Recurring Work Orders

The Add New Recurring Work Orders screen is displayed on Fig. 3.26. This work order screen has many of the same fields as the standard work order screen and is also broken into three parts: The Header; The Lines Tab and the General Tab. These three parts are detailed on the following pages.
The HEADER portion of the recurring work order screen is used to document the work order. The fields on the header portion of the recurring work order screen are detailed below. Once the header has been completed it must be saved in order for the user to add lines to the recurring work order. Saving the header assigns a unique recurring work order number and enables the function buttons directly below the ‘Lines’ grid area. After the header has been saved, it can be edited, by clicking the <Edit> button at the bottom of the screen. This <Edit> button also controls the editing capabilities on the General ‘Tab’.

**Work Order** “NEW-xx” will display in the work order field until the work order header has been saved. Total Recall will automatically assign the next sequential recurring work order number when the recurring work order header is saved.

**Desc.** This field allows the user to enter a description of the general activity being performed on the work order such as ‘Daily Tape Rotation’ or ‘Wednesday Rotation’.

**Customer** Each customer has a unique customer identifier. Enter this unique number into the ‘Customer’ field. If the number is unknown, click on the binoculars button to the right of the field and a listing of all customers will display. The user can simply begin typing in the company name until the indicator is to the left of the company record to be selected. The user can then either click the <Select> button at the bottom of the screen or press [ENTER] twice. The customer identifier will then display in the field.

**Name** After the customer identifier has been entered, Total Recall will automatically display the corresponding customer name from the customer maintenance screen.

**Dups on Adds** This feature allows for duplication of the previous recurring work order line screen when adding multiple lines to a recurring work order, thus saving much time in entering line data. This feature can be perpetually engaged from the system parameters screen. See Chapter 10 – System Menu – Parameters screen – Work Order System Parameters.
**Request By**  This field indicates the person requesting the recurring service. The drop down box displays a listing of the security authorizations associated with the specified customer. The user can use the mouse to select the person requesting the service. This field is a ‘walk-a-long’ field, that allows for quick entry of the selection provided the requestor is listed in the drop down listing. If the requestor is not in the listing, the user should enter the person. This name will then be transferred to the work order line as the person requesting the service. If this person does not appear in the security authorization listing and security has been engaged for this customer, the requestor must indicate who the request is for and this name must be indicated on the work order line or the request will not be able to be completed. This field may or may not be a required field of entry depending upon the parameter settings in the system menu. *Note: See Chapter 10 – System Menu – Work Order/Space Allocation, for more information on requiring entry to this field.*

**Trans**  This field is for entering a transportation charge (if any is to be applied) associated with the recurring work order. The codes that appear in this field are those that are entered as category ‘5’ codes in the master or customer service code screen. This is a walk-a-long field for easy entry. Select the code from the listing if a transportation charge is to be associated with the recurring work order. *Refer to Chapter 5 – Master/Customer Service Codes for information on adding additional transportation charges.*

**Prep By**  This field will automatically default to the user logged into the system at the time the work order is created. This field can be edited and changed if the person creating the work order is not the person currently logged into Total Recall.

**Next Due Date**  This field displays the current days date. Enter the date this work order is to be first created. Each time the recurring work order is converted, this date is updated to reflect the next date the work order is due.
The LINES tab of the recurring work order screen is where work order lines are entered. This tab becomes enabled when the header has been saved. Because a recurring work order consists of ‘Other’ work order lines, the function buttons for the recurring work order screen are limited to adding, editing and deleting work order lines. The add line screen is displayed below. This is the same screen used for adding ‘Other’ work order lines for standard work orders. This screen is displayed on Fig. 3.27 followed by details on the fields in this screen.

**Recurring Work Order Lines Screen**

**Line #**  This field displays the number of the current work order line displayed on the screen. This number is incremented every time a <Save> is engaged. The number of lines currently added to the work order is one less than what is displayed in the <Line #> field.

**Department**  If the recurring service being performed is to be charged to a department, that department must be entered. This work order line cannot be saved if the customer has been set as ‘Department Required’, until a department has been selected. This is a walk-a-long field for easy entry, click on the arrow to the right of the field to view a listing of the available departments.

**Person**  This field should reflect the name of the person requesting the service. The names that appear in this drop down are those that appear in the Security ‘Tab’ of the customer maintenance screen for the selected customer. This is a walk-a-long field for easy entry.
**Transport**

This field is for entering a transportation charge associated with the recurring work order line if necessary. Click on down arrow to view a listing of available transportation codes. Codes that appear in this drop down are those that are set up as a category ‘5’ service code. This is a walk-a-long field for easy entry of the appropriate code.

**Billing Ref**

This field allows the user to enter a billing reference to be associated with the work order line.

**Service Codes**

You can enter up to four (4) miscellaneous service codes for each recurring work order line. These fields are used to charge a customer for services performed (i.e.: tape rotation; tape pull; tape return). Click on the down arrow key to the right of this field to view the available miscellaneous code choices. This is a walk-a-long field for easy entry. When a code is selected, the code description is displayed to the right and a quantity field is to the right of this field. If the quantity is always the same for each recurring work order, enter the quantity on this screen, otherwise, leave it blank and enter the quantity on the converted work order. *Note: See Chapter 5 - Master or Customer Service Codes for additional information on adding miscellaneous service codes.*

**Custom Billing Item**

This field allows for the user to enter a customized billing line. This will print on the invoice exactly as entered in this field.

**Price Each**

If a custom billing item has been entered and a price is to be associated with this item, enter the price for each in this field.

**Quantity**

If a custom billing item and a price each has been entered, enter a quantity in this field. *Note: If the quantity is left blank, the item will not bill.*

**Tax Rate**

If a custom billing item has been entered and tax is to be charged for the item, enter the tax rate in this field and the tax will be automatically calculated.

**GL Account**

If a custom billing item has been entered, and general ledger numbers are necessary for each billable item, enter the general ledger number in this field.
**Location Fixed Allocation** – If the service that is being billed relates to a container, enter the unique location for the container in this field. Total Recall will then display the Total Recall container number associated with this location. If the Total Recall container number is known this can be entered and the location will display. Click on the binoculars to search the container inventory. From the inventory screen the `<Select>` button can be clicked and the container information will be transferred to the ‘Other’ input screen.

**Dynamic Allocation** – If the service relates to a container, enter the Total Recall container number and the location of the container will automatically display. The container inventory can be searched by clicking on the binoculars clicking on the `<Select>` button to transfer the information to the other input screen.

**T.R. Con Fixed Allocation** – If the service that is being billed relates to a container, after the unique location has been entered in the ‘Location’ Field, the Total Recall container number will display. The user also can enter the Total Recall container number to identify the container and the location of that container will display.

**Dynamic Allocation** – If the service that is being billed relates to a container, enter the unique Total Recall container number and the location will automatically display. If the Total Recall container number is not known the user can click on the binoculars and search the container inventory. When the container is highlighted, clicking the `<Select>` button transfers the inventory information to the ‘Other’ input screen.

**Item ID Fixed Storage** – If the service to be charged relates to an indexed item, enter into this field the unique Item ID for the item. Total Recall will automatically display the location of the container, the Total Recall container number and the Total Recall item number.

**Dynamic Allocation** – If the service to be charged relates to an indexed item, this field will automatically default to the information contained within this field, if any, in the indexed item inventory.
**T.R. Item #**  
**Fixed Storage** – If the service that is being billed relates to an Indexed Item. This number automatically defaults to the unique Total Recall™ Item number when the Item ID has been entered. This number can also be entered to identify the Indexed Item.

**Dynamic Allocation** – If the service that is being billed relates to an indexed item, enter the unique Total Recall item number and Total Recall will display the respective Total Recall container number and location of the container. If the unique Total Recall item number is not known, the user can click on the binoculars and search the item inventory. When the indexed item is located, highlight the item and click on the `<Select>` button. The information from this inventory record will then copy to the Other Input screen.

**Desc.** When a container has been identified, the information that resides in the container description field from the inventory record displays in this field.

**Reference Fields** When a container has been identified and selected, any information residing in the first three (3) reference fields of the inventory record will display in these reference fields. *Note: If the reference fields for the customer have been customized they will reflect as the customized caption and not as ‘reference x’.*

**Storage Code** This field will display the storage code associated with the container from the inventory record.

**Container Status** If the selected container currently displays a ‘Retrieved’ status, this field will display “OUT”. Otherwise, the status will display as “IN”.

**File/Item Status** If the selected indexed item currently displays a ‘Retrieved’ status, this field will display “OUT”, otherwise, the status will display as “IN”.
The **GENERAL** ‘Tab’ of the recurring work order screen allows the user to schedule the recurring work order; select a site other than the default delivery address to be printed on the work order, enter requisition information, and enter special instructions pertaining to the work order. This screen also stores audit information related to the specified work order.

To access this tab, click the tab titled ‘General’ directly below the *<Prep By>* and *<Next Due Date>* fields. The General ‘Tab’ screen is displayed on Fig. 3.28. The fields on this screen are detailed below.

**General Tab Screen**

### Daily or Every _ Days

Work orders can be scheduled daily, which may include from one to seven days consistent each week, or every _ number of days. Select daily or enter a number in the field ‘Every ___ Days’ field.

### Exclude

Check all days that will be EXCLUDED from the schedule. For example, for a Wednesday only rotation, select daily and exclude all days except Wednesday. For every other day rotating, select every 2 days. If you want to include the weekend in the schedule do not exclude any days. This will produce a work order on Monday – Wednesday – Friday – Sunday one week and Tuesday – Thursday – Saturday the next week. Otherwise, exclude Saturday and Sunday.
<table>
<thead>
<tr>
<th><strong>Omit Excluded Days</strong></th>
<th>Click on this checkbox if the days marked excluded are not to be counted when the ‘Every ____ Days’ feature is selected.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Site</strong></td>
<td>If the recurring work order is to be delivered to an address other than the default delivery address, select the site where the recurring work order is to be delivered. This alternative address will be displayed and will print on the converted work order.</td>
</tr>
<tr>
<td><strong>Street</strong></td>
<td>This field will display the street address from the default delivery address on the customer maintenance screen unless a site has been selected. If a site is selected, the street address for the site will be displayed in this field and will print out on the converted work order.</td>
</tr>
<tr>
<td><strong>City</strong></td>
<td>This field will display the city from the default delivery address on the customer maintenance screen unless a site has been selected. If a site is selected, the city associated with the site address will display here and will print out on the converted work order.</td>
</tr>
<tr>
<td><strong>State</strong></td>
<td>This field will display the state from the default delivery address on the customer maintenance screen unless a site has been selected. If a site is selected, the state associated with the site address will display in this field and will print on the converted work order.</td>
</tr>
<tr>
<td><strong>Zip</strong></td>
<td>This field will display the Zip Code associated from the default delivery address on the customer maintenance screen unless a site has been selected. If a site is selected, the Zip Code associated with the site address will display in this field and will print on the converted work order.</td>
</tr>
<tr>
<td><strong>Type</strong></td>
<td>This field can be used to enter how the invoice will be paid such as purchase order.</td>
</tr>
<tr>
<td><strong>Number</strong></td>
<td>This field can be used to enter a requisition number if one is required.</td>
</tr>
<tr>
<td><strong>Create Date</strong></td>
<td>This field indicates the date in which the recurring work order was created.</td>
</tr>
<tr>
<td><strong>Last Update</strong></td>
<td>This field indicates the last date that the recurring work order was updated.</td>
</tr>
</tbody>
</table>
**Ln**  This field displays the total number of lines entered on the recurring work order.

**RE #**  This button allows for the user to renumber the recurring work order lines. As lines are deleted, they need to be renumbered. Renumbering can occur automatically depending on the number or lines on the work order. *See Chapter 10 – System – Parameters – Bar Code/Field Lengths ‘Tab’ to set the Number of Lines to automatically renumber if the number of Lines is less than the number indicated.* The program will prompt the user to renumber the recurring work order lines if the number of lines exceeds the number indicated in the parameters table. If the user declines to renumber, clicking this button will automatically renumber the lines.

**Id**  This field displays the User ID of the person logged into Total Recall at the time the recurring work order was created.
The View List of Recurring Work Orders screen is displayed Fig. 3.29. This screen allows the user to view a current list of the recurring work orders. This screen allows the user to open and view or edit a recurring work order or convert a recurring work order to an active work order. To convert a recurring work order to an active work order, highlight the work order in the listing and click the <Make 1 WO> button.

Recurring Work Order Screen

Next Due Date This column notates the next due date for this recurring work order. Recurring work orders can be printed in advance. Each time a work order is converted this date is updated to reflect the next date the work order is to be processed according to the schedule set.

Last Created This column notates the last date a work order was converted to an active work order.

WO # This column displays the recurring work order number. This number will change when converted to an active work order.

Customer This column lists the customer for whom the recurring work order was created.

Description This field is for the user to enter a brief work order description, often times the rotation schedule.
Convert Recurring Work Orders to Active Work Orders

Converting recurring work orders to active work orders allows the user to enter a date range and convert recurring work orders to active work orders for the date range specified. The screen on Fig. 3.30 displays when this option is selected.

The end date automatically displays the current day's date. Enter a start date and an end date and click the <View Wo’s> button. The list of recurring work orders will display, as shown on the previous page. From this screen the user can highlight one work order and click the button <Make 1 WO>. To make multiple work orders for the date range previously specified, click the <Make WO’s> button. As each work order is made, the ‘Next Due Date’ field is adjusted and displayed on the screen, if the ‘Next Due Date’ falls within the date range previously entered. Continue making work orders until the screen is clear. This will indicate that all work orders have been converted to active work orders for the date range specified.

The work orders will now be listed in the browse list of work order screen with a unique work order number. They can be printed in advance and as services are completed, the quantities can be entered if this fluctuates with the rotations.
Export Work Order For Use In Another Version of Total Recall

This option allows for a user to export a work order in Total Recall to another version of Total Recall. When this option is selected the screen on Fig. 3.31 displays.

Prior to exporting any work order(s), the individual work order(s) will need to be exported. To export a work order, open the work order and click the <Export WO> button in the lower left corner of the work order screen. Total Recall will prompt the user: ‘This feature exports and closes the selected work order…Do you wish to continue?’ Click <Yes> to close and export the work order, click <No> to close the screen and not proceed with the export.

Select where the files are to be exported: Floppy Drive ‘A’, ‘B’ or ‘Remote’.

All work orders that have been individually exported will be exported to the source selected by clicking the <Export> button. If the files are to be exported to a floppy diskette and the diskette needs to be formatted prior, click on the ‘Format Disks’ prior to clicking the <Export> button.

The export creates four files for each work order exported. The files are the work order number followed by ‘woh.dbf’, ‘woh.fpt’, ‘wol.dbf’ and ‘wol.fpt’.
Transfer A Retrieved Item to Another Individual

This option allows for indexed items to be transferred from one person to another without checking the items in and back out. The screen in Fig. 3.32 displays when this option is selected.

The user will enter the indexed item bar code into the designated field by manually keying in the item bar code number or using a keyboard wedge to input the item bar code. Enter the person’s name the item is to be transferred to in the designated field, this also can be scanned using a keyboard wedge if the users have names bar coded.

When this option is used, a work order is NOT created, the requestor name is updated immediately and the next work order number in the inventory record will reflect ‘TRTRAN’. The transfer will be noted in the history with a code of ‘TRT’.
Log Off

Log Off removes the current user from Total Recall™ without closing the program. A new Security Logon window will appear, for the next user to enter their User Name and Password.

Show Tool Bar

This menu item displays the Total Recall™ toolbar beneath the Menu bar. A check mark will appear beside this option when the toolbar is enabled. To disable the toolbar, click this menu item; the check mark will disappear and the toolbar will not be displayed.

Exit

To close Total Recall™, select Exit. All users will be logged off, and the program window will close.
CHAPTER 4

Scanning

Overview

Using a bar code scanner can greatly increase productivity within a record center. This chapter details the procedures for using the bar code scanner. Total Recall currently supports the Compsee Apex II scanner. This scanner is supported by software installed outside of Total Recall, which provides the capability to upload and retrieve data files from the scanners without accessing Total Recall. The software that supports the Apex II scanner is ‘Apex Application.’ This chapter will outline installing the software, loading the bar code scanner and using the bar code scanner.

Installing the Apex II Scanner and the Apex Manager Software

**Installation**

Before installing, make sure that all other programs are closed. **Note:** This program must be installed on the local drive of all machines that will be uploading the Apex Bar Code scanner. **Refer to the installation instructions included in the Implementation Guide.** The program setup will initialize and display the window on Fig. 4.1.

![APEX 3.0 Application Manager Setup](image)

**Fig. 4.1**

This program should be installed in the default directory shown above. Once the program has been installed the user can create a shortcut on the desktop to quickly access the program. The command line for creating the shortcut would be: ‘C:\APEX3MGR\APPMANG.EXE’

**Note:** If using the Apex rechargeable batteries, they must be charged in the Apex II for 24 hours prior to using the scanner for the first time, and whenever not in use. Four (4) AA Batteries can be used in the scanner but they will wear down quickly.
Downloading the Apex II Scanner

Once the Apex Manager program has been installed, the user must then download the program into the Apex II Hand Held Scanner. **Note: It is not necessary to repeat this downloading process unless you have been sent new program diskettes or you want to change the project loaded in the scanner.** The steps to downloading the program are outlined below.

**Step 1**
Connect the cable enclosed with the Apex II scanner to the back of the computer where the Apex Manager program has been installed. This cable must be connected to a ‘Com’ port. A 25-pin to a 9-pin adapter may be necessary for the connection. These adapters can be purchased at most electronics stores. If an Apex Cradle is being used, place the cable into the port at the rear of the cradle and plug in the power source. This cradle acts as both a communications cradle and a battery charger.

**Step 2**
Connect the Apex II scanner to the cable that has been attached to the back of the computer or set the Apex II scanner into the communications cradle.

**Step 3**
Open the Apex Manager program by double clicking on the desktop icon or by clicking the <Start> button, going to Programs ➔ Apex Application Manager ➔ Apex Application Manager. The screen on Fig. 4.2 displays when this program is opened.

![Fig 4.2](image-url)
### Step 4

From the file menu, click on **OPEN PROJECT** option. The Project Maps displayed will differ depending on the Record Center and the Project requested from DHS Worldwide. The Table below details the most common Project Maps available. Contact DHS Worldwide for additional information on the Project Maps available. Highlight the Project choice and double click or click on the `<OK>` button. The opened project will display in the lower right portion of the screen.

<table>
<thead>
<tr>
<th>PROJECT MAPS</th>
<th>PROJECT FUNCTION</th>
<th>SCREEN OPTIONS</th>
<th>FILE OUT NAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCANTOWO</td>
<td>Ships standard with Total Recall. Allows the user to scan all containers and files back to the pick up request work order.</td>
<td>F1 – Scan to WO F2 – Containers F3 – File to Box</td>
<td>Scantowo.txt Contain.txt Quickin.txt</td>
</tr>
<tr>
<td>DHSDYN2</td>
<td>Scan mode toggles between location and container.</td>
<td>F1 – Dynamic Alloc F2 – Reconcile F3 – Relocate</td>
<td>Barin.txt Recon.txt Quickin.txt</td>
</tr>
<tr>
<td>DHSDYN3</td>
<td>Scan mode scans location and then all containers to that location.</td>
<td>F1 – Dynamic Alloc F2 – Reconcile</td>
<td>Barin.txt Recon.txt</td>
</tr>
<tr>
<td>DHSDYN4</td>
<td>Basic bar code functions, with length validation. Scan mode toggles between location and container.</td>
<td>F1 – Return Files F2 – Containers F3 – File to Box</td>
<td>Barin.txt Contain.txt Quickin.txt</td>
</tr>
<tr>
<td>DHSDYN5</td>
<td>Basic bar code functions, with length validation. Scan mode scans location and then all containers to that location.</td>
<td>F1 – Return Files F2 – Containers F3 – File to Box</td>
<td>Barin.txt Contain.txt Quickin.txt</td>
</tr>
<tr>
<td>CUSTBOX#</td>
<td>Allows the user to relate a customer box number to a Total Recall barcode number with the scanner.</td>
<td>F1 – Return Files F2 – Containers F3 – Add New Boxes</td>
<td>Barin.txt Contain.txt Addboxin.txt</td>
</tr>
<tr>
<td>CUSIDBX</td>
<td>Allows the user to scan or enter a customer ID when scanning containers into Total Recall. <em>Note: This project map is for Adding New Boxes Only.</em></td>
<td>F1 – File to Box F2 – Dynamic Alloc F3 – Cust Id/Box</td>
<td>Quickin.txt Contain.txt Custidbx.txt</td>
</tr>
</tbody>
</table>
**Step 5**  
With the project opened, the user can then set the Com Port where the scanner is connected. To do this the user will need to click on the setup menu and select the appropriate Com Port. If unknown, start at Com Port 1. If a message is received when the download is attempted to check the Com Port, select Com Port 2 from the setup menu. Continue until the computer communicates with the scanner. Once the Com Port has been set, it will be held in memory and will not need to be adjusted unless the Com Port is changed.

**Step 6**  
The Apex II scanner is now ready to be downloaded with the program file. From the file menu select **Download Files**. Depending on the project map selected, a Download screen will display. A sample download screen for SCANTOWO.map is displayed to the right.

From this screen the user will select Scan To WO in the download section and all options in the data files section. **Operating System** is the only option that is not to be selected.

**Step 7**  
Make sure that the scanner is turned ON, and then click on the <OK> button. The program files will begin downloading into the scanner. As this happens a yellow progress bar will appear at the bottom of the screen and the Apex II scanner will display: ‘Receiving Program . . .’When complete the Apex Scanner will display a blinking cursor in the upper left corner of the display screen and the following message will display on the computer screen: ‘Send Save and Set Apex in Run Mode?’ Click on <Yes>, the program files are saved into flash memory. When completed, the Apex II will beep and display the main menu.
Note: If the message on Fig 4.3 displays make sure that your Apex II scanner is in the ON position; the Apex is connected to the computer; and the correct Com Port has been selected.

Failed To Communicate Error

Fig. 4.3

The display on the Apex II scanner should now show the Main Program Menu. The Main Menu for the ScantoWO.map is displayed below. The Apex II scanner is now ready to begin scanning.

F1 SCAN TO WO
F2 CONTAINERS
F3 FILE TO BOX
F4 PARAMETERS

Note: If you have downloaded any of the other program files available, you will have different options available on the main menu.
Scanning With The APEX II Scanner

The Apex Manager project that ships standard with the purchase of the Apex II scanner and Total Recall is **Scan To WO**. This map is created by DHS based on the specifications of locations and container barcodes in your center. Additional scan programs are available upon request. Refer to the table on page 4 of this chapter for a list of available Apex Manager programs and their functionality. Please contact DHS Worldwide if you are interested in receiving a different Apex project. This manual outlines the Apex Manager **Scan To WO** project that ships standard. All other scan map programs operate similarly. Below is a brief description of the menu options available with this project. *Note: The Scan To WO map will ask you to enter a work order number to add the scans to upon downloading the scanner into Total Recall. A work order should already be created and saved prior to scanning any boxes or files with the Scan To WO map.*

**F1 Scan To WO**

This program is the main program that will be used in the majority of the functions within the record center. This program allows the user to add new containers to inventory, relocate containers and files within the record center, re-file containers and files within the record center and put away files and containers.

**F2 Containers**

This program will allow the user to scan an area of the warehouse and verify with the program that all containers are in the correct location. If there are exceptions, the system create work orders to automatically relocate a container that is in the wrong location, return a container that is showing in the system as retrieved and add a container that is on a shelf but not showing in the system. The service codes for the different activities will be set up on the upload screen.

**F3 File to Box**

This program allows the user to relocate indexed items from a file stage area, back to the original container without creating work orders.

**F4 Parameters**

The parameters program allows the user to change the date and time in the Apex II scanner.
F1 Scan To WO

The majority of the daily tasks will be done through the ‘F1 – Scan To WO’ feature. This feature allows the user to perform activities and adds those activities to work orders already created in Total Recall using the Apex II scanner.

Adding New Containers

When new containers arrive at the record center, they can be processed in one of two ways. Both of these are described below.

Enter all Detail on a Work Order Prior to Scanning. All detail, including, but not limited to, container descriptions, customer box numbers, expiration / destruction dates pertinent to the container is entered on a work order. If the containers were labeled prior to arriving at the record center, or immediately upon arrival, the corresponding bar code number would need to be entered into the Total Recall container number field on each work order line. From the work order input screen, the user will click on the <Add Container> button or the lightning bolt to the right of this button. All information regarding the container is to be entered on the work order line. The location field can be left blank or a ‘Staging’ location can be entered, to identify that the container has not yet been shelved. If labels are affixed to the containers prior to entry of data, that bar code label number will need to be entered in the Total Recall container number field. If labels are to be printed from the work order screen and then affixed to the container, the TR container number field will be left blank and Total Recall will assign the next available container number as the work order line is saved. Note: Refer to Chapter 3 for more information on the ‘Add Container’ input screens.

When a user chooses to enter container detail on a work order prior to scanning the containers, the ‘Dups on Adds’ feature can be very beneficial.

After the work order(s) has been entered into the system, the work order(s) must be Closed. This will add the containers to inventory.

The containers are now ready to be scanned. The containers are scanned with a relocate code (Category ‘7’ Code) or a return retrieved container code (Category ‘E’ Code), this code will automatically relocate a container that is in the system but not currently retrieved, providing that a default relocation code has been set up in the System Menu Parameters option Bar Code/Field Lengths ‘tab’. Note: Refer to Chapter 10 for additional information on setting up the default relocation code.

Note: If a return code is used, an exception will print on the error report for each container stating: ‘Container has not Retrieved... Relocation WO line created.’
Scanning Containers upon Arrival at the Record Center. When containers are scanned to inventory prior to data being entered, the barcode on the container must identify (1) the owner of the container and (2) the size of the container so that the monthly storage code can be determined. If the user fails to identify this information, the containers scanned will error upon import into Total Recall. Below details how to designate the customer. The following page lists the hierarchy used to determine the size of the container that ultimately determines the recurring monthly storage charge.

Customer/Owner of the Container

Customer labels can be pre-assigned, printed and sent to the customer prior to the containers entering the record center. When labels are pre-assigned they are printed from the Maintenance Menu → Customer Labels → Container Labels. The customer number is entered on this screen. It is advisable to have this number print on the customer label. If the customer is a departmentalized customer, the department can be assigned using this screen by entering the department number into the ‘Department’ field. It is advisable to have this information print on the labels so that customers do not mix labels within departments. Note: Refer to Chapter 5 for more information on pre-printing container labels.

Generic container labels can be printed from the Utility Menu → Print Container/File Labels → Container Labels → Preprint Labels. These need to be assigned to a customer as they are placed on containers prior to the scanner being uploaded. To assign these labels to a customer the user would access the Maintenance Menu → Customer Labels → Container Labels, click on <Add>. When the screen displays with the next available container number the user carefully overwrites the next available container number with the first container number being assigned to the customer, in the ‘Starting Container Number’ field and carefully enters the last container number in the sequence into the ‘Ending Container Number’ field. Note: When labels are pre-assigned to a customer, no monthly storage charges are accessed to the customer until the labels are placed on containers and the containers scanned into inventory. If labels are lost, print new labels and do not reprint labels, in case these labels are later found.

Monthly Storage Code: 1) Total Recall, will determine if the service code entered into the Apex Scanner has a related storage code. Total Recall is looking for the relationship between the add container code and the monthly storage code. If there is a related storage code, this storage code will be assigned to the container. The related storage code can be entered on the master or customer service code screens. Note: Refer to the Chapter 5, Maintenance Menu → Master and/or Customer Service Codes for more information on adding related storage codes.
2) If the add container code does not have a related storage code, Total Recall checks to see if the initial location where the container is scanned has been designated with a storage code. This initial location is often times a staging area or pallet location that has been setup specifically to assign the monthly storage code. To designate locations to a storage code, access the facility layout screen from the maintenance menu. Enter the beginning and ending location range and enter a storage code. Note: Refer to Chapter 5 for more information on setting up the facility layout.

3) If the add code does not have a related storage code and the location has not been pre-assigned to a specific storage code, Total Recall will assign the default storage code, if a valid default storage code exists. The Default Storage Code is set up on the System Menu ➔ Parameters option ➔ Work Order/Space Allocation ‘Tab’. This Default Storage Code should be the code associated with the most common size container. Note: Refer to Chapter 10 for more information on the default storage code.

Note: The order listed above is the hierarchical order. Once Total Recall associates a storage code with a container, that storage code is never changed unless a user manually or globally changes the storage code, regardless of where or how often the container is moved throughout the record center.

Note: The following Menus may differ depending on the Apex Project selected. The ScanToWO.map Project is detailed below and on the following pages. This program ships standard. Other Apex Manager Projects function similarly.

Turn the Apex II Scanner on by pressing the red button in the lower left corner of the scanner. The Main Menu will display. Note: The Main Menu for ScanToWO is shown below, if the copyright displays instead of the Main Menu, you will need to Download the program into the Apex II Scanner, see page 189.

F1 Scan To WO
F2 Containers
F3 File to Box
F4 Parameters
There is a series of four gray function buttons directly under the display on the Apex II scanner. These four (4) buttons allow the user access to the Main Menu features: **F1** – Scan To WO (Standard Scanning Capabilities); **F2** – Containers (Verification of Inventory); **F3** – File to Box (Relocate File to the Original Box without creating a Work Order); **F4** – Parameters (Allows user to set Date and Time).

Press the **F1** key, the following screen will then display on the Apex II scanner.

```
Sub Menu For
Scan To WO
Enter Data
Press Enter
```

Press the green (Enter) button on the Apex II Scanner to proceed, the following screen will display.

```
DHS Associates
Scan Items To An
Existing WO #
User ID: _ _ _ _ _
```

Enter a User ID into the **User Id** field. The User ID can be a name, first or last, employee number or any combination of letters and/or numbers that will identify the user with up to six (6) characters. Once the **User Id** has been entered, press the green (Enter) button (if six characters are entered or the **User Id** is scanned the screen will automatically advance) the following screen will display on the Apex II Scanner.

```
Service Code: _ _ _
WO #: _ _ _ _ _ _
Loc: _ _ _ _ _ _ _ _
Bar Code: _ _ _ _ _
```
Service Code  The scanner is now requesting a service code to identify the type of service the user will be performing. The user will want to use a service code that is a Category Code ‘3’ (Add New Container), Category ‘E’ (Return Retrieved Container), Category Code ‘7’ (Relocation) or Category Code ‘E’ (Return Retrieved Container). If a return retrieved container code is used, be sure that a default relocation code has been entered on the parameter screen of the System Menu ➔ Bar Code/Field Lengths ‘Tab’.

*The most common code for receiving containers is RTN, and RTF for receiving files.

Note: Using a return retrieved container code that has been related to an add container code allows the user to scan both returned containers and new containers without separating the containers.*

WO#  This will be the work order number that the scans will be added to when the scanner is uploaded.

Loc:  The scanner is now ready to scan a location. Press the green (Scan) button and aim the scanner at the shelf bar code label, having the red laser light completely across the label. The Apex II scanner will beep when it reads the label.

Bar Code:  The Apex II scanner is ready to scan a container. Each time a scan is read the barcode field is cleared and allows the user to continue scanning containers. When the user is ready to change the location, click on the up arrow button on the Apex II scanner and the cursor will move to the location field. The user then scans the location and then scans the containers to be placed into that location. *Note: The user must press the up arrow key on the Apex scanner when changing locations and the cursor must be on the location field before a new location is scanned.*

When the user has finished scanning all containers, the data will need to be retrieved from the Apex II scanner using the Apex Manager program and then uploaded into Total Recall through the File Menu. Please skip to the instructions on retrieving data from the Apex II scanner.

Re-file Container or Indexed Item  When containers or indexed items are returned to the record center, they can be processed and immediately placed in a staging area or on a shelf. Indexed items are often processed into a file staging area until time permits to place them back into their permanent container. It is important for containers and Indexed items to be scanned as soon as they arrive at the record center, so if a container or indexed item is requested prior to it being shelved or placed back into the permanent container, it can be easily located.
Note: If containers or indexed items are placed into a staging area upon entry to the record center, see the section on relocating a container or indexed item, later in this chapter to move the containers or indexed items to a shelf or container location.

The steps below outline the procedures for re-filing a container or indexed item using the Apex II scanner.

Press the F1 key to access the Scan to WO menu. Follow the steps beginning on page 10 to get to the screen shown below.

```
Service Code: _ _ _
WO #: _ _ _ _ _
Loc: _ _ _ _ _ _ _
Bar Code: _ _ _ _ _
```

**Service Code**
The scanner is now requesting a ‘Service Code’ to identify the type of task the user will be performing. The user will enter a service code that is related to the task. If containers are being returned, enter a service code with a Category Code ‘E’ (Return a Container) or if indexed items are being returned, enter a service code with a Category Code ‘F’ (Return an Indexed Item).

**WO#**
This will be the work order number that the scans will be added to when the scanner is uploaded.

**Loc:**
- **Containers:**
  If containers were being scanned, this would be a staging location or a shelf location.

- **Indexed Items:**
  If indexed items were being scanned, this would be an item staging location or the container from which the indexed item was retrieved.

*Note: It is recommended to stage all indexed items to an item staging area upon arrival back at the record center. The indexed item is then available immediately if requested before time permits for the item to be placed back to the permanent container.*

Press the green (Scan) button and aim the scanner at the location bar code label (if scanning a container) or at either the file staging location or the container label (if scanning an indexed item). The red laser light must be positioned completely across the label. The Apex II scanner will beep when it reads the label.
Bar Code: If returning containers, the Apex II scanner is ready to scan the container bar code.

If returning indexed items, the Apex II scanner is ready to scan the indexed item bar code.

After the container or indexed item has been scanned, items can continue to be scanned into the same location. When a location is to be changed, the user will need to click on the up arrow \( \uparrow / \downarrow \) button on the Apex II scanner. The cursor will move to the location field for the new location to be scanned followed by the containers or indexed items that are to be scanned to the location.

When the user has finished scanning all containers and/or indexed items, the data files will need to be retrieved from the Apex II scanner using the Apex Manager program and then uploaded into Total Recall through the file menu. Refer to instructions on retrieving data from the Apex II scanner later in this chapter.

<table>
<thead>
<tr>
<th>Relocating a Container or Indexed Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Containers and indexed items can be relocated throughout the record center using a relocation code entered into the Apex II scanner. You will need to create a WO first on recall before relocating items. Note: ScantoWO offers a feature to relocate indexed items back to their original containers without creating a work order, refer to the F3 – File to Box option later in this chapter.</td>
</tr>
</tbody>
</table>

Turn the Apex II Scanner on by pressing the red button in the lower left corner of the scanner. The Main Menu should display as shown below.

```
F1 Scan To WO
F2 Containers
F3 File to Box
F4 Parameters
```

There is a series of four buttons directly under the display on the Apex II scanner. These four keys represent Function buttons that allow the user access to the Main Menu features.

Press the F1 key to access the Scan to WO program. Follow the Steps on page 10 to get to the screen displayed below.

```
Service Code: _ _ _
WO #: _ _ _ _ _
Loc: _ _ _ _ _ _ _
Bar Code: _ _ _ _ _
```
**Service Code:** The scanner is now requesting a ‘Service Code’ to identify the type of transaction the user will be performing. The user will enter a service code that is a Category Code ‘7’ (Relocation). Enter the service code and the input location screen will display.

**WO #:** This will be the work order number that the scans will be added to when the scanner is uploaded.

**Loc:** **Containers:**
The scanner is now ready to scan a location. Scan the location bar code label where the container is to be placed. Press the green (Scan) button and aim the scanner at the shelf bar code label. The red laser light must be positioned completely across the label. The Apex II scanner will beep when it reads the label.

**Indexed Items:**
The scanner is now ready to scan the container where the indexed item is permanently housed. Scan the container label by pressing the green (Scan) button and aiming the scanner at the container bar code label. The red laser light must be positioned completely across the label. The Apex II scanner will beep when it reads the label.

**Bar Code:** **Containers:** The scanner is ready to scan the container being relocated. Press the green (Scan) button and aim the scanner at the container bar code label. The red laser light must be positioned completely across the label. The Apex II Scanner will beep when it reads the label. The user can continue scanning containers into the current location. When the user is ready to change locations, the user will need to press the up arrow \( \uparrow \) / \( \downarrow \) button on the Apex II scanner and scan the next location. From there the user will scan the containers to be placed into the location.

**Indexed Items:** The scanner is ready to scan the indexed item that is being placed in the container. Scan the indexed item bar code label by pressing the green (Scan) button and aiming the scanner at the indexed item bar code label. The red laser light must be positioned completely across the label. The Apex II scanner will beep when it reads the label. The user can continue scanning indexed items into the container. If more than one indexed item is to be returned to the previously scanned container and the user is ready to move to the next container, click on the up arrow \( \uparrow \) / \( \downarrow \) button on the Apex II scanner and scan the new container, from there the user will scan the indexed items into the container.
When the user has finished scanning all containers or indexed items, the data will need to be retrieved from the Apex II scanner using the Apex Manager program and then uploaded into Total Recall through the File Menu. Please refer to instructions on retrieving data from the Apex II scanner later in this chapter.

Permanently Remove a Container

Containers can be Permanently Removed from the Record Center using the Apex II Scanner, if the Containers are pulled from a Removal or Destruction list prior to a Work Order being created.

Note: If the Containers to be Permanently Removed are first listed on the Work Order, refer to the section on using the Apex II Scanner to send the Picklist to the Apex II scanner to verify the Containers.

Each Container will be scanned using a Permanent Removal Code. This data will be retrieved from the Apex II scanner and uploaded into a Work Order in Total Recall™, creating the Permanent Removal Work Order. The Work Order can then be verified through the ‘Verify’ feature on the Work Order.

The process of scanning Permanently Removed Containers is the same as Re-filing or relocating a container. Follow the steps shown on the previous pages for permanently removing Containers. Make sure to use a Category Code ‘2 (Permanently Remove Container) service code.
Retrieving Files from the Apex II Scanner

After scanning the user will need to retrieve the data files from the Apex II scanner. This is accomplished through the Apex Manager program. Once the files have been retrieved, the user will upload the data into a work order in Total Recall. The data file is usually sent to the Apex3mgr directory on the local drive of the computer where the file was retrieved from the scanner. The steps for retrieving the data files from the Apex II scanner are outlined below and on the following pages.

Open the Apex Manager program by double clicking on the Apex Application Manager icon or by maximizing the program on the task bar if the program is opened.

Open the project that is currently loaded into the Apex II handheld scanner by selecting the Open Project option from the File Menu. If the project was already opened, the currently loaded project will display in the lower right corner of the screen.

From the file menu select Retrieve Files. A screen similar to the one on Fig 4.4 will display. The ScantoWO.map retrieve files screen is displayed below. The data files will display differently depending on the project currently opened.

Connect the Apex II scanner to the Com Port on your computer and turn the Apex II Scanner on. Click on Scan to WO, and click on the <OK> button. The Apex II scanner will beep three times and the files will begin uploading. If the message: ‘Failed to set Hand Held in immediate mode. Check the communications port and the power on the unit.’ is displayed, make sure that the Apex II Scanner is on, the communications cable is secure at the back of the computer and that the correct Com Port has been selected. Attempt to retrieve the data again. If it is necessary to change the Com Port, with the project open, click on the setup menu and select a different Com Port, and attempt to retrieve the data again.
After the data has been retrieved the following message will display: ‘Delete Application 1’s data collection file?’ The message signifies that data file has been successfully transferred from the Apex II scanner to the local drive of the computer. Click on <OK> which will erase the data file from the Apex II scanner.  

Note: If the <Cancel> button is clicked instead of the <OK> button the data will remain in the Apex II scanner and as the scanner is used again the new data files will append to the data file left in the scanner.

The Apex Application Manager program will secondly prompt the user to ‘Set Apex in run mode?’ Select <OK>. The Apex II scanner will beep three times and the main menu will display.  

Note: If <Cancel> is clicked instead of the <OK> button and the main menu does not appear on the Apex II scanner, hold down the <ALT> key and the <R> key on the Apex II scanner. The scanner will beep and the main menu will display.

The data files will now be located in the Apex3Mgr directory on the local drive. These files will remain in this directory until they are imported into Total Recall. If another Apex II scanner is uploaded containing data scanned using the Scan to WO feature prior to the current file being imported into Total Recall, the second file will append to the first file. Once a file has been imported into Total Recall it is erased from the Apex3Mgr directory.

Note: The data files are backed up and can be retrieved once initially imported from the inquiry menu in Total Recall - History of Barcode Scan Errors → View/Recover Barcode Backup Files

**Importing Data File Into Total Recall**  
After the data file has been retrieved from the Apex Scanner, from the local computer where the files were retrieved, the user will access Total Recall. From the File Menu, select Apex II Portable Bar Code Options → Import Work Order Data → Import WO Data. A screen similar to the one on Fig 4.5 will display.
The path to the Apex II Files should display as ‘C:\Apex3Mgr\’. If this is not displayed enter the path, this should only have to be entered one time, this information will be saved in this field.

Below the middle section of the screen a list of file imports will be displayed. The Standard Barcode Import should be selected. This indicates that Total Recall has found a Scan To WO file in the directory indicated that is waiting to be imported.

In the ‘Work Performed By:’ field the user currently logged into Total Recall will display. This name should reflect the person that scanned the data file being imported. This name can be changed in this field prior to upload.

The Auto Close Work Order checkbox can be checked if the user wants the work order(s) to be closed automatically after the import is complete. The system administrator may opt to have the Auto Close Work Order feature automatically checked. Note: See Chapter 10 – System Menu → Parameters → Work Order Parameters for more information on this feature. Reminder: Any billing items can be added or edited on a closed work order.

Click on the <Import> button to upload the data file. The system will prompt the user: ‘Do You Wish To Clear Error File?’ Click on <Yes> to clear the previous error log. Note: All error logs are backed up and can be accessed from the Inquiry Menu → History of Barcode Scan Errors → View List of Errors. If you click <No> any errors obtained from the current import file will be added to the previous error log.
The data will then import. When the import is complete, Total Recall will prompt the user: ‘Processing complete C:\Apex3Mgr\Barin.txt import file saved as Byyyymmdhmmnnn’. This message indicates that the import file has been backed up in the Total Recall directory. The first letter will always be a ‘B’ which indicates it was a standard barcode import file which is followed by the current system century/year, the current system month, the current system day and finally the minutes and seconds. This will always be a unique file number, which allows the user to easily access the backup file. Note: If this data file needs to be recovered and re-imported, access the Inquiry Menu – History of Barcode Scan Errors – View/Recover Barcode Backup Files. See Chapter 6 for more information on Recovering Backup Files. The user will click the <OK> button.

If the upload screen was marked to Automatically Close Work Orders, the work order close screen(s) will flash on the screen. Once complete or if work orders were not automatically closed, a print screen will display that will allow the user to click <OK> and print the barcode upload report. This report displays a list of all valid scans for the data file just imported. The total number of scans at the bottom of the report should be verified against the number of items actually scanned. This report should be initialed by the person who completed the scan to indicate that the totals matched. Note: If counts do NOT match, they should be reconciled immediately, if Not this can lead to lost containers.

When the print screen is closed, the upload screen will display again with the top bar displaying the number of records processed. The second bar displays the user ID, service code and location of the last record. The third bar displays the total number of errors and/or warnings recorded. If this field is blank, no errors or warnings were recorded.

If errors were encountered, click on the <Errors> button to view the error log created. This log should then be printed and errors immediately reconciled. Once reconciled this report should be initialed. Refer to the list of frequent errors and warnings later in this chapter. Note: It is a lot easier to reconcile an error immediately after it was made than to spend time searching for a missing container or file days, weeks, months and years later!

To view the work orders created from this file import access the file menu and select Edit/Create Work Orders → Browse List of Work Orders. The work orders imported should display close to the bottom of the list and will have a work order description: ‘Bar Code Import’.
Containers Added
If new containers were added to inventory in the scan file and the work order was not automatically closed, the work order lines can be edited to add description, reference field or date information.

If new containers were added to inventory in the scan file and the work order was automatically closed, the department, and reference 1 field can be edited and will automatically update the container inventory screen. The container description, additional reference field information, or date information can be added to the container using the container maintenance screen, accessed from the maintenance menu (see Chapter 5) or the Rapid Data Maintenance screen, found under the Container Inquiry Menu (see Chapter 6).

Containers Relocated
Containers Relocated will display the last location in the <Location> column and the newly scanned location in the <New Location> column.
F2 Container

This feature is designed to allow the user to ‘reconcile’ or ‘verify’ the location of containers within the record center a section at a time.

When this option is uploaded, any discrepancies found during the scan process will display in a list. The user then has the option to have Total Recall create work orders lines for the discrepancies.

Turn the Apex II Scanner on by pressing the red button in the lower left corner of the scanner. The Main Menu should display as shown below. **Note:** The Main Menu for DHSDYN3 will not have a ‘F3’ feature. If a copyright displays instead of the Main Menu, you will need to Download the program into the Apex II Scanner.

There is a series of four buttons directly under the display on the Apex II scanner. These four buttons represent Functions that allow the user access to the Main Menu features. To access the Reconcile Menu, press the F2 key and the following screen will display on the Apex II scanner.

User Id: Enter a User name in the ‘**User Id**’ field. This can be a name, first or last, or an employee number, up to six (6) characters. Press (Enter) when complete.
Service Code: Enter the service code for reconciling containers. This should be a Category Code ‘7 (Relocation) service code. 
Note: The most common code for relocations is RLO.

Loc:/BarCd: Scan a location and then all containers within the scanned location. Press the up arrow / key on the Apex II scanner to move to the next location and continue scanning. Scan the location first and then the containers within the location. When the section is complete, the data files should be retrieved from the Apex II scanner.

Retrieving Files from the Apex II Scanner: After scanning the user will need to retrieve the data files from the Apex II scanner. This is accomplished through the Apex Manager program. Once the files have been retrieved, the user will upload the data into a work order in Total Recall. The data file is usually sent to the Apex3mgr directory on the local drive of the computer where the file was retrieved from the scanner. The steps for retrieving the data files from the Apex II scanner are outlined below and on the following pages.

Open the Apex Manager program by double clicking on the Apex Application Manager icon or by maximizing the program on the task bar if the program is opened.

Open the project that is currently loaded into the Apex II handheld scanner by selecting the Open Project option from the File Menu. If the project was already opened, the currently loaded project will display in the lower right corner of the screen.

From the file menu select Retrieve Files. A screen similar to the one below will display. The ScantoWO.map retrieve files screen is displayed on Fig. 4.6. The data files will display differently depending on the project currently opened.
Connect the Apex II scanner to the Com Port on your computer and turn the Apex II scanner on. Click on **Containers**, and click on the <OK> button. The Apex II scanner will beep three times and the files will begin uploading. If the message: ‘Failed to set Handheld in immediate mode. Check the communications port and the power on the unit.’ is displayed, make sure that the Apex II scanner is on, the communications cable is secure at the back of the computer and that the correct Com Port has been selected. Attempt to retrieve the data again. If it is necessary to change the Com Port, with the project open, click on the setup menu and select a different Com Port, and attempt to retrieve the data again.

After the data has been retrieved the following message will display: ‘Delete Application 2’s data collection file?’ The message signifies that data file has been successfully transferred from the Apex II scanner to the local drive of the computer. Click on <OK> which will erase the data file from the Apex II scanner. **Note:** If the <Cancel> button is clicked instead of the <OK> button the data will remain in the Apex II scanner and as the scanner is used again the new data files will append to the data file left in the scanner.

The Apex Application Manager Program will secondly prompt the user to ‘Set Apex in run mode?’ Select <OK>. The Apex II scanner will beep three times and the main menu will display. **Note:** If <Cancel> is clicked instead of the <OK> button and the main menu does not appear on the Apex II scanner, hold down the <ALT> key and the <R> key on the Apex II scanner. The scanner will beep and the main menu will display.

The Data files will now be located in the Apex3Mgr directory on the local drive. These files will remain in this directory until they are imported into Total Recall. If another Apex II scanner is uploaded containing data scanned using the Scan To WO feature prior to the current file being imported into Total Recall, the second file will append to the first file. Once a file has been imported into Total Recall it is erased from the Apex3Mgr directory.

**Importing Data File Into Total Recall**

After the data file has been retrieved from the Apex II scanner, the data file resides on the local drive of the computer where it was imported. This file will need to be copied to the Total Recall directory. **Note:** Contact the technical support department at DHS Worldwide if you plan on using this feature and we can direct this file to your Total Recall directory so that you will not need to move it every time. The file to be moved is **Recon.txt**, located in the C:\Apex3Mgr directory. To move the file use Windows® Explorer and cut the file from the Apex3Mgr directory and paste it into the Total Recall directory.

From the file menu, select Apex II Portable Bar Code Options → Verify Inventory → Import Data. A screen similar to the one on Fig. 4.7 will display.
Initially, the user will enter a default relocation code, a default container add code and a default return container code. After the first time these are entered they will be saved on this screen but can be edited at any time.

Click the <Import> button to begin the import. Total Recall will prompt the user: ‘Do You Wish to Clear Error File?’ Click on <Yes> to clear the previous error log. If you click <No> any errors obtained from the current import file will be added to the previous error log.

The data will import. Upon completion the verify container locations screen will display with the total number of records processed displaying in the top field. The last record scanned displaying in the middle field and the total number of errors (if any) in the third field.

If errors exist from the current import, click the <Errors> button and a screen similar to the one displayed on Fig. 4.8 will display.
Verify Inventory Error Screen

From this screen the user can scroll through the records listed. The Default activity code set up on the input screen will display in the Activity column.

The discrepancies listed can be printed by clicking on the <Print> button at the bottom of the screen.

The user should reconcile every discrepancy listed. Any containers listed, as ‘not found in inventory’ need to be researched to identify the customer and the size of the container. Any items listed that should Not be added as a work order line should be highlighted and the <Delete> button at the bottom of the screen should be clicked, prior to creating work orders.

By clicking the <Make WO’s> button Total Recall will create work order lines for all exceptions listed, using the default activity code listed on the input screen and in the activity code column, of the individual item.

If a container is in a different location in Total Recall than where it was scanned, a work order line will be created to relocate the container to the newly scanned location.

If a container is in Total Recall with a retrieved status, a work order line will be created to return the container to inventory, accessing any charges associated with the default activity code listed.
If a container is currently not listed in inventory, a screen similar to the one at the right will display for the user to enter the customer number and a monthly storage code for the container.

The record number will be displayed in the upper left corner of the screen. The user can enter the additional information listed or elect to skip the record by clicking the <Skip> button at the bottom of the input screen. If the missing information is entered and the <Save> button is clicked, a work order line will be created to add this container to inventory using this information.

After the work orders have been created, Total Recall will display a message stating the total number of records processed, the number of records skipped and the number of work orders created (one work order per customer). All records imported will be cleared from the discrepancies log. Any records that were skipped will remain in the log.

Note: The work orders created using this utility will need to be Closed. Inventory will not be affected until the work orders created have been closed.

To view the work orders created, access the File Menu ➔ Edit Work Order ➔ Browse List of Records. Work orders created will have a work order description of ‘WO Created by Inventory Verification Routine’.

Double click on the work order to be viewed or edited, or highlight the work order and click the <Edit> button. The individual lines can then be viewed or edited by double clicking on the line, highlighting the line and clicking on the Edit Work Order Line button, or enter the line number in the <Edit Line> field. If a container has been relocated, the new location will display in the new location column, not the location column on the work order. When all editing is complete the work order will need to be Closed for the changes to take effect.
**F3 File to Box**

This feature is designed for the user to relocate indexed items from a temporary staging area to their permanent container without creating work orders or accessing charges. Charges for the return of the file are accessed as they are placed in the temporary staging area as they arrive back at the record center.

Turn the Apex II scanner on by pressing the red button in the lower left corner of the scanner. The main menu should display as shown below. *Note: If a copyright displays instead of the main menu, you will need to download the program into the Apex II scanner.*

![Main Menu](image)

There is a series of four buttons directly under the display on the Apex II scanner. These four buttons represent functions that allow the user access to the main menu features. To access the File to Box feature, press the **F3** key, the following screen will then display on the Apex II scanner.

![Sub Menu For File to Box](image)

Press the green (Enter) button on the Apex II scanner to proceed. The following screen will then display.

![User Input](image)

The user will need to enter their name, first or last, or an employee number (up to 6 characters) in the ‘User Id’ field and press (Enter) if less than six characters have been entered. Enter the relocate service code.  
*Note: The most commonly used service code is RLO.*
The cursor will automatically advance to the ‘Loc’ field. Scan the Total Recall container bar code where the indexed item is being placed. (Remember the location of the indexed item is the container). Note: This feature will not work if you are using an alternative bar code as the container bar code. The cursor will advance to the item field. Scan the indexed item bar code being placed into the container. After the indexed item has been scanned, the ‘Loc’ and ‘Item’ fields will clear on the Apex II scanner and the cursor will return to the ‘Loc’ field. The cursor will continue toggling between the ‘Loc’ and the ‘Item’ fields until the user finishes the scans. When scanning is complete the files will need to be retrieved from the Apex scanner and then uploaded into Total Recall.

Retrieving Files from the Apex II Scanner

After scanning the user will need to retrieve the data files from the Apex II scanner. This is accomplished through the Apex Manager program. Once the files have been retrieved, the user will upload the data into a work order in Total Recall. The data file is usually sent to the Apex3mgr directory on the local drive of the computer where the file was retrieved from the scanner. The steps for retrieving the data files from the Apex II scanner are outlined below and on the following pages.

Open the Apex Manager program by double clicking on the Apex Application Manager icon or by maximizing the program on the task bar if the program is opened.

Open the project that is currently loaded into the Apex II handheld scanner by selecting the Open Project option from the File Menu. If the project was already opened, the currently loaded project will display in the lower right corner of the screen.

From the File Menu select Retrieve Files. A screen similar to the one below will display. The ScanToWO.map retrieve files screen is displayed below. The data files will display differently depending on the project currently opened.

Retrieve Files Screen
Connect the Apex II scanner to the Com Port on your computer and turn the Apex II scanner on. Click on **File to Box**, and click on the <**OK**> button. The Apex II scanner will beep three times and the files will begin uploading. If the message: ‘Failed to set Handheld in immediate mode. Check the communications port and the power on the unit.’ is displayed, make sure that the Apex II scanner is on, the communications cable is secure at the back of the computer and that the correct Com Port has been selected. Attempt to retrieve the data again. If it is necessary to change the Com Port, with the project open, click on the setup menu and select a different Com Port, and attempt to retrieve the data again.

After the data has been retrieved the following message will display: ‘Delete Application 3’s data collection file?’ The message signifies that data file has been successfully transferred from the Apex II scanner to the local drive of the computer. Click on <**OK**>, which will erase the data file from the Apex II scanner. **Note:** If the <**Cancel**> button is clicked instead of the <**OK**> button the data will remain in the Apex II scanner and as the scanner is used again the new data files will append to the data file left in the scanner.

The Apex Application Manager Program will secondly prompt the user to ‘Set Apex in run mode?’ Select <**OK**>. The Apex II scanner will beep three times and the main menu will display. **Note:** If <**Cancel**> is clicked instead of the <**OK**> button and the main menu does not appear on the Apex II scanner, hold down the <**ALT**> key and the <**R**> key on the Apex II scanner. The scanner will beep and the main menu will display.

The Data files will now be located in the **Apex3Mgr** directory on the local drive. These files will remain in this directory until they are imported into Total Recall. If another Apex II scanner is uploaded containing data scanned using the Scan To WO feature prior to the current file being imported into Total Recall, the second file will append to the first file. Once a file has been imported into Total Recall it is erased from the **Apex3Mgr** directory.

<table>
<thead>
<tr>
<th>Importing Data File Into Total Recall</th>
</tr>
</thead>
<tbody>
<tr>
<td>After the data file has been retrieved from the Apex scanner, from the local computer where the files were retrieved, the user will access Total Recall. From the file menu, select Apex II Portable Bar Code Options → Import Relocate Files Data → Barcode Import. A screen similar to the one on Fig. 4.10 will display.</td>
</tr>
</tbody>
</table>
The path to the Apex II Files should display as ‘C:\Apex3Mgr\’. If this is not displayed enter the path, this should only have to be entered one time, this information will be saved in this field.

Click on the <Import> button to upload the data file. The system will prompt the user: ‘Do You Wish To Clear Error File?’ Click on <Yes> to clear the previous error log. Note: All error logs are backed up and can be accessed from the Inquiry Menu – History of Barcode Scan Errors – View List of Errors. If you click <No> any errors obtained from the current import file will be added to the previous error log.

The data will then import. When the import is complete, a print screen will display that will allow the user to click <OK> and print the barcode upload report. This report displays a list of all valid scans for the data file just imported. The total number of scans at the bottom of the report should be verified against the number of items actually scanned. To indicate that the totals are matching, the report should be initialed by the user that performed the scan.

Total Recall will then prompt the user: ‘Processing complete C:\Apex3Mgr\Quickin.txt import file saved as Qyyyymmddnnnnn’. This message indicates that the import file has been backed up in the Total Recall directory. The first letter will always be a ‘Q’, which indicates it was a quick barcode import file. This is followed by the current system year, the current system month, the current system day and finally the minutes and seconds. This will always be a unique file number, which will allow the user to easily access the backup file. Note: If this data file needs to be recovered and re-imported, access the Inquiry Menu – History of Barcode Scan Errors – View/Recover Barcode Backup Files. See Chapter 6 for more information on recovering backup files. The user will click the <OK> button.
When the print screen is closed the upload screen will display again with the top bar displaying the number of records processed. The second bar displays the user ID, service code and location of the last record in the data file. The third bar displays the total number of errors and warnings recorded. If this field is blank, no errors or warnings were recorded.

If errors were encountered, click on the `<Errors>` button to view the error log created. This log should then be printed and errors immediately reconciled. Note: If an indexed item was placed into a container that it does not belong to, an error will be recorded and the file will show in that container until it is relocated to the proper container. Refer to the list of frequent errors and warnings later in this chapter.

Reminder: It is easier to reconcile an error immediately after it was made than to spend time searching for a missing container or file days, weeks, months and years later!

This process does not create work orders. It simply moves indexed items from one place to another. The last work order field will display as ‘999999’, which indicates the last action performed on this item was a relocate without a work order being created.
COMMON SCAN ERRORS AND WARNINGS

The list below shows some of the most common scan errors and warnings encountered when processing daily work using the Apex II scanner along with the cause and a solution. The error report should be printed out and reconciled immediately after scanning is complete.

Errors

**Item is Already in Scan File. This entry was skipped.** The container or indexed item was scanned more than one time. The last scan was accepted, all previous scans within the same scan file are skipped and an error generated.

Verify that the container or item is in the last location scanned. *Note: It is better to scan a container or item a second time and receive this error than not to scan it at all.*

**nnnnnnnn – The Container was not found in inventory and has not been pre-assigned to a customer.** The container bar code scanned was not found in the current container inventory and the bar code number was not assigned to a customer number in the pre-assigned label screen.

Access the Maintenance Menu – Customer Labels – Container Labels – enter the bar code number(s) in question and assign them to the appropriate customer. Re-import the scan file. *Note: See Chapter 6 - Inquiry Menu – History of Barcode Scan Errors – View/Recover Barcode Backup Files for instructions on recovering the barcode backup files.*

**Invalid Service Code XXX** The service code entered into the Apex II scanner was not a valid service code for the designated customer.

Check the service code entered against the customer service code listing. If the service code needs to be added, add the code and re-import the file. If the code was entered incorrectly, edit the import file and re-import the file. *Note: See Chapter 6 - Inquiry Menu – History of Barcode Scan Errors – View/Recover Barcode Backup Files for instructions on recovering the barcode backup files*
Warnings

The container was not found in inventory… Container will be added to inventory on WO. The container was scanned using a return retrieved container service code that was related to the add container service code.

The warning is advising the user it has changed the service code from the return to the add service code.

The container has not been Retrieved … Relocation WO line created. The container was scanned using a return retrieved container service code. The container was found in inventory but did not have a retrieved status. The container was relocated to a newly scanned location.

The warning is advising the user it changed the service code from the return to the default relocation code set up in the system parameter screen.

Note: If the container scanned was just returned from the customer and the container was not placed on a work order when it was retrieved. To add charges for the return charges, add an ‘Other’ billing line to the work order and use the miscellaneous service code fields to add a re-file charge.
SEND PICKLIST TO THE APEX II SCANNER

This feature can be used to pull containers for retrievals or permanent removals. It can also be used to verify containers pulled for retrieval or permanent removal/destruction. It allows the user to send a ‘Picklist’ from retrieval or removal work orders to the Apex II scanner, scan the containers as they are pulled or after they are pulled and verify the containers against the original work order(s).

To use this option the user must first clear out the Apex II scanner from any project that may currently be loaded in the unit, unless the Picklist program is the current program. To do this, turn the Apex II scanner to the OFF position, hold both the [ALT] and the [SPC] keys simultaneously on the Apex II scanner and then turn the Apex II scanner ON. The Apex II will re-boot, and the copyright will display on the screen. If the last function on the Apex II scanner was the Picklist program, you will not need to re-boot.

Access the File Menu → Apex II Portable Bar Code Options → Send Picklist to Apex. A screen similar to the one in Fig. 4.11 will display.

![Picklist Screen](Image)

Fig. 4.11

Enter the work order number or range of work order numbers to be downloaded to the Apex II scanner Picklist in the fields ‘Starting Work Order’ and ‘Ending Work Order’. Only open work orders that contain lines with retrievals or permanent removals will be downloaded to the Apex II scanner Picklist function.
The Winlink program must be installed on the computer where the download is to take place. Enter the path to Winlink or click the browse button to navigate to this folder. This will normally be ‘C:\Apexware’.

Select the Com Port where the Apex II scanner is currently connected. Once the Path to Winlink and the Com Port has been selected, this information is saved and will not need to be entered with subsequent downloads.

When the work order range has been designated, the Winlink path and Com Port selected, connect the Apex II scanner to the computer using a communication cable directly or a communication cradle, turn the Apex II scanner on and the scanner is ready to be loaded.

If the scanner was re-booted and the copyright appears on the screen, click on the <<Load Program>> button. A screen similar to the one below will display while the program is loading.

![Fig. 4.12](image.png)

Upon completion of the program being loaded the status window will close and the ‘Send Picklist to Portable’ screen will display. The Apex will display a blinking cursor in the upper left corner of the screen. It is now ready to have the data files downloaded.

After the Picklist program is loaded, the data files will need to be transferred. With the Apex II scanner On, and connected to the computer, and work order(s) designated, click the <<Load Data File>> button. A status window similar to the one on the previous page will display. After immediate mode is verified, it will state: ‘Loading File to Apex …’ and then ‘Sending Run …’.

Note: When a download attempt is made, the status of the lines on the designated work order(s) is immediately changed to ‘D’ for downloaded. Therefore, if an error occurs during the attempted download and a second download attempt is necessary, you will need to select ‘Check to Re-Send Previously Downloaded Lines’.

Upon Data Files being sent to the Apex II scanner, the status window will close and the ‘Send Picklist to Portable’ screen will display. The Apex II scanner is now ready to verify the work order lines.
Possible Download Errors

Communications Timed Out… The Picklist program was attempting to load, but the power to the Apex scanner was not ON; the Apex II scanner was not connected to the computer or the Com Port is not correct.

Turn the Apex scanner ON; check the connection to the computer; change the Com Port setting.

There Are No Work Orders … There are no open work orders with lines containing container retrievals or permanent removals within the range specified.

Enter a valid work order range; click the ‘Check to Re-Send Previously Downloaded Lines’ and click the <Load Data File> again.

There are No Work Orders in the Specified Range Valid for Picklist This message occurs when a previous attempt was made to download a Picklist with the same work order(s) and that attempt failed. The work order lines were marked as downloaded but then the download was unable to be completed.

Click on ‘Check to Re-Send Previously Downloaded Lines’, and click on the <Load Data Files> button for these lines to be re-sent to the Apex II scanner.

Program File Not Loaded. You are missing a file PICKLIST.APX. Contact DHS Worldwide.

After the Picklist has been downloaded into the Apex II scanner, the screen will display the container and location of the container at the first location. A sample of the Apex II screen is displayed below.

```
x-xx-xxx-x-xx
0000104248
Not Found!
F1-Back  F2- Next
```
The Apex II scanner will indicate the location and Total Recall container number of the first container to be retrieved or permanently removed. Containers are displayed in location order. The user may proceed to this first location, pull the container and scan the container barcode label. If the correct container is scanned, the Apex II screen will display the location and the container with the words ‘Found - OK’.

To proceed to the next container, press the F2 button. The user has the ability to scroll forwards or backwards through the containers by using the F1 key to go backwards and the F2 key to move forwards.

If all containers have been pulled and placed in a temporary location prior to being delivered or destroyed, the user will simply begin scanning the containers in any order.

If a container is scanned that is NOT in the Picklist currently loaded into the Apex II, the scanner will sound a triple beep. This indicates to the user that this container is not included in this pull and needs to be scanned back to a shelf location – the container should be immediately removed from the current location.

When all containers have been scanned, connect the Apex II to the computer. Access the File Menu → Apex II Portable Bar Code Options → Retrieve Picklist from Apex. The screen on Fig 4.13 will display.

The Com Port will be set from the previous download. If the Com Port has been changed, select the appropriate port. Check to be sure the power is ON on the Apex II scanner and click on the <Retrieve Data Files> button.
The Picklist will upload to Total Recall. Upon completion, if all containers were located and scanned, the system will prompt the user: ‘File Retrieval Completed Successfully’. Click the <OK> button.

If there are any containers that were not scanned, Total Recall will prompt the user: ‘Do You Want A Report of PickList Lines not Validated?’ Click on <Yes> to get this list or <No> to continue without printing the list. The program will then prompt the user: ‘File Retrieval Completed Successfully’. Click <OK>.

After the Picklist has been retrieved from the Apex II scanner, access the work order(s) that were downloaded to the Apex II scanner from the File Menu → Edit work order screen. The status (S) column will display either a ‘V’ if the container was verified or ‘D’ if the container was downloaded to the Picklist but NOT verified. In the example displayed on Fig 4.14, work order line # 0009 was not verified, the status column displays the letter ‘D’.

**Work Order Input Screen**

![Work Order Input Screen](Fig 4.14)

To see only those containers that were downloaded but not verified, click on the <Verify> button. In the verify mode, click on the <Hide Verified Items> button. All items with a status of ‘V’ will be hidden from view, only containers not verified will display.

To view all items on the work order, click on <Show Verified Items> button and all lines will again display on the work order screen. To exit the verify mode, click on <Exit Verify Mode>.
VERIFY RETRIEVALS

The Verify Retrievals feature allows the user to verify all containers and indexed items that are currently on an open work order for retrieval or permanent removal using a keyboard wedge or the computer keyboard. Upon verification, the work orders can be printed and closed from this screen.

To access this option from the file menu, select Apex II Portable Bar Code Options → Verify Retrievals. Total Recall will prompt the user: ‘Do you wish to clear error log?’ Click <Yes> to clear the error log of items previously scanned that were not in the listing. Click <No> to append to this log.

A screen similar to the one on Fig. 4.15 displays when this option is selected listing all containers and/or indexed items on open work orders that have an activity of retrieval or removal.

![Verify Retrievals Screen](image)

This screen will display the work order number and work order line for each container or indexed item displayed, followed by the Total Recall container number. If an indexed item is being retrieved a Total Recall item number will display. The action column designates the work order line activity code. Container activities will be listed with box descriptions and indexed item activities will be listed with the item descriptions, if these are listed in the inventory record. By scrolling to the right the user can view additional reference field information.
To use this screen, the user will click in the <Finder> field. Using a keyboard wedge, scan the bar code labels of the containers or the indexed items pulled for verification. As the containers and/or indexed items are scanned they will disappear from the listing and the work order line will be marked as verified in the status column.

This process can also be done without a keyboard wedge by entering in the bar code label numbers into the <Finder> field. Note: If you are using the Total Recall item number to verify files retrieved, you must first enter the letter ‘F’ followed by the Total Recall file number – zeros between the letter ‘F’ and the tracking number do not need to be entered. If the file number is a designated length (the length must be specified in the system parameters screen), simply enter the file number including any preceding zeros if the number is not the designated length. As the containers and/or indexed items are scanned, they will disappear from the listing and the work order line will be marked as verified in the status column.

If a container or indexed item is scanned that is not in the listing, a message box will appear ‘Item Not Found on Work Order’. This line item will record in the error log. Click <OK> to acknowledge the message.

If you do not want the ‘Not Found’ message to display, check the box <Do Not Display Message When Item is Not Found> prior to entering data. The line item will be recorded in the error log but the message will not display.

The following details the buttons found at the bottom of this screen.

**Errors**  Click the <Errors> button to view or print a listing of all containers or indexed items that were scanned or entered incorrectly that do not match any item on the listing.

**Print**  Click the <Print> button to display a listing of all work orders with lines listed on the previous screen. The user will place a ‘Y’ in the ‘Print WO?’ column for each work order that is to be printed.

By clicking the <Print> button at the bottom of this screen, the Print Work Order screen will display allowing the user to send the work orders to print. After the work orders have been sent to print, a system message will display: ‘NN work order(s) printed . . . Do you wish to close the printed work orders?’ Click <Yes> to close the work order(s) just printed or click <No> to exit the screen without closing the work orders.
Delete  To delete a work order line listed on the screen, from the actual work order, highlight the line and click the <Delete> button. A message window will display asking the user: ‘Do you wish to delete Work Order line nnnn on Work Order nnnnnn?’ To proceed with deleting the work order line, click <YES>. To abort this process and return to the verify screen, click <NO>. Note: This process deletes a line from the work order, not a line appearing on this screen.

Exit  Use the <Exit> button to Exit the Verify Data Out Bound screen and return to the Total Recall main menu.
PERMANENTLY RELOCATE AN ITEM TO A CONTAINER

This feature allows a user to permanently move an indexed item from its existing container to a new container.

To use this feature the Apex II scanner must be downloaded with the MoveFile project. Contact DHS Worldwide if you currently do not have this project file and would like to use this feature.

Open the Apex manager program. From the file menu select open project. Select the MoveFile.map from the window displaying all projects currently available. This map file will then display in the lower right corner of the screen.

With the Apex II scanner turned ON and connected to the Com Port at the back of the computer, select download files from the file menu. Check Source Program and Move Files on the download screen. Check to be sure the Apex II Scanner is still ON and click <OK>.

When the program has loaded, the computer will prompt the user: ‘Send Save and Set Handheld in Run Mode?’ Click <Yes>. The handheld will complete the transfer and beep three times. The main menu will display on the Apex II scanner as shown below.

<table>
<thead>
<tr>
<th>F1</th>
<th>Relocate File</th>
</tr>
</thead>
<tbody>
<tr>
<td>F4</td>
<td>Parameters</td>
</tr>
</tbody>
</table>

Press the gray F1 key to access the relocate file program. The screen below will display on the Apex II scanner.

Sub Menu For
Relocate File
Enter Data
Press Enter

Press the green (Enter) button on the Apex II scanner. The Apex scanner will display the screen shown below.

User Id: _ _ _ _ _ _
Service Cd: _ _
Box: _ _ _ _ _ _ _
File: _ _ _ _ _ _ _

**User ID:** Enter the user identification with up to eight (8) characters into the ‘User
Id’ field. This can be a name, employee number or any other means to identify the user scanning. Press the green (Enter) button on the Apex II scanner to advance to the next field. If all eight characters have been entered the cursor will automatically advance to the next field.

**Service Cd:** Enter a service code for relocation. The cursor will automatically advance to the ‘Box’ field.

**Box:** Scan the container bar code for the box where the files are to be moved. The cursor will advance to the ‘File’ field.

**File:** Scan all the files that are to be placed into this container. To change to a different container, press the up arrow ↑/↓ button on the Apex II scanner. Scan the next container bar code and continue scanning files into this container.

When scanning is complete the user will need to retrieve the files from the Apex II scanner.
RETRIEVING FILES FROM THE APEX II SCANNER

After scanning the user will need to retrieve the data from the Apex II scanner. This is done through the Apex manager program. Once the files have been Retrieved, the user will Upload the data into a Work Order in Total Recall™. The data file is sent to the Apex3Mgr directory on the local drive of the computer where the files were retrieved from the scanner.

The steps for retrieving the data files from the Apex II scanner are outlined below and on the following pages.

Open the Apex Manager program by double clicking on the Apex Application Manager Icon. If the program was previously opened check the task bar and maximize the screen.

Open the MoveFile.map Project that is currently loaded into the Apex II handheld scanner by selecting the Open Project option from the File Menu. If the project was already opened it will display in the lower right corner of the screen.

From the File Menu select Retrieve Files. A screen similar to the one on Fig 4.16 will display.

Retrieve Files Screen

Connect the Apex II scanner to the Com Port located at the back of the computer and turn on the scanner. Click on Move Files, and click the <OK> button. The Apex II scanner will beep three times and the files will begin uploading. If you receive the message: ‘Failed to set Handheld in immediate mode. Check the communications port and the power on the unit’. Ensure that the Handheld is On, the communications cable is secure at the back of the computer and that the correct Com Port has been selected. Attempt to retrieve the data again.
After the data has been retrieved the following message will display: ‘Delete Application 1’s data collection file?’ The message signifies that data file has been successfully transferred from the Apex II scanner to the local drive of the computer. Click on <OK>, which will erase the data file from the Apex II scanner. _Note: If the <Cancel> button is clicked instead of the <OK> button the data will remain in the Apex II scanner and as the scanner is used again the new data files will append to the data file left in the scanner._

The Apex Application Manager program will secondly prompt the user to ‘Set Apex in run mode?’ Select <OK>. The Apex II scanner will beep three times and the main menu will display. _Note: If <Cancel> is clicked instead of the <OK> button and the main menu does not appear on the Apex II scanner, hold down the <ALT> key and the <R> key on the Apex II scanner. The scanner will beep and the main menu will display._

The data file is now located in the Apex3Mgr directory on the local drive. These files will remain in this directory until they are imported into Total Recall. If another Move File data file is retrieved prior to this file being imported into Total Recall, the second file will append to the first file. Once a File has been imported into Total Recall it is erased from the Apex3Mgr directory.
IMPORTING DATA INTO TOTAL RECALL

After the data file has been retrieved from the Apex Scanner it will be located on the local drive of the computer where the data file was retrieved. From this computer the user will access Total Recall. From the file menu, select Apex II Portable Bar Code Options ➔ Permanently Relocate/Add an Indexed Item to a Container ➔ Import WO Data. A screen similar to the one on Fig. 4.17 will display.

The path to the Apex II Files should display as ‘C:\Apex3Mgr\’. If this is not displayed enter the path. This should only have to be entered one time and this information will be saved in this field.

The Auto Close Work Order checkbox can be checked if the work order(s) is to be closed automatically after the import. The system administrator may opt to have the auto close work order feature automatically checked. See Chapter 10 ➔ System Menu ➔ Parameters ➔ Work Order Parameters for more information on this feature.

In the ‘Work Performed By:’ field the user currently logged into Total Recall will display. This name should reflect the person that scanned the data file being imported. This name can be changed.

Click on the <Import> button to upload the data file. The system will prompt the user: ‘Do You Wish To Clear Error File?’ Click on <Yes> to clear the previous error log. Note: All error logs are backed up and can be accessed from the Inquiry Menu ➔ History of Barcode Scan Errors ➔ View List of Errors. If you click <No> any errors obtained from the current import file will be added to the previous error log.

The data will then import. When the import is complete, Total Recall
will prompt the user: ‘Processing complete C:\Apex3Mgr\Movefile.txt import file saved as Myyyyymmddnnnnn’. This message indicates that the backup of the import file has been completed. The first letter will always be a ‘M’, which indicates it was a MoveFile Barcode Import file. This is followed by the current system century/year, the current system month, the current system day and finally the minutes and seconds. This will always be a unique file number and will allow the user to easily access the backup file.  

*Note: If this data file needs to be recovered and re-imported, access the Inquiry Menu – History of Barcode Scan Errors – View/Recover Barcode Backup Files. See Chapter 6 for more information on recovering backup files.* 

The user will click the <OK> button.

If the upload screen was marked to Automatically Close Work Orders, the work order close screen(s) will flash on the screen. The upload screen will display again with the top bar displaying the number of records processed. The second bar displays the User Id, service code and location of the last record in the data file. The third bar displays the total number of Errors and Warnings recorded. If this field is blank, no Errors or Warnings were recorded.

If errors were encountered, click on the <Errors> button to view the error log created. This log should then be printed and errors immediately reconciled.

To view the work orders created from this file import go to the File Menu, select Edit/Create Work Orders Æ Browse List of Work Orders. The work orders imported should display close to the bottom of the list and will have a work order description: ‘Bar Code Import’. A separate work order will be created for each customer scanned. You can double click on any work order listed or enter the work order number in the <Open WO> field to open the work order. If work orders were not automatically closed upon import, they will need to be closed to reflect in inventory.
VERIFY PUT AWAYS

This option is for **FIXED ALLOCATION ONLY**. The Apex Manager project is **DhsDyn.map**. The files retrieved from the Apex II scanner will create a file named: ‘Verify.txt’.

To Verify Put Aways, the containers are scanned before being placed on the shelf. After they are stored on a shelf, they may be rescanned and the location information verified. While Total Recall enters the entire location address into its data files, the verification process only looks at the actual shelf assignment and not the container position. If the basic address information does not match, an entry is made into an error log.

From the file menu, select Apex II Portable Bar Code Options – Verify Put Aways. The user is prompted to clear the existing error log before proceeding. Click on <Yes> to clear the error file or click <No> to add to the previous error file.

The ‘Verify Put Aways’ screen will display. Click on the <Verify> button and the text file will display as shown in Fig. 4.18

The user now has the ability to verify the containers that were put away and note any discrepancies to return to and fix.
APEX II SCANNER FUNCTIONS

Return to a previous input screen or field. Use the up arrow button \( ^{\nearrow} / \searrow \) on the Apex scanner until the input screen or field is displayed.

Scanner misreading labels. Clean the lens on the Apex scanner and check for a scratched lens. If the lens is scratched, contact DHS Worldwide for instructions to send the scanner in for repair. Have the Apex II scanner available when calling, the Serial Number and Month, and Year from the tag on the scanner will be needed.

Apex screen only displays a cursor in the upper left corner of the screen when it is turned On. Hold down the \(<\text{ALT}>\) key on the Apex unit and press the letter \(<\text{R}>\). This will reset the scanner and display the currently loaded Apex project main menu.

To Quit the current scan session and return to the Sub Menu or the Main Menu. Hold down the \(<\text{ALT}>\) key on the Apex unit and press the letter \(<\text{Q}>\), this will take the user to the sub menu for the current project. Pressing the \(<\text{ALT}>\) key and \(<\text{Q}>\) key a second time will take the user back to the Apex II main menu.

Manually Erase the Scan Data File. To manually clear the scanner of a data file, go to the main menu and select the menu option used to create the data file. When the sub menu displays, press the up arrow button \( ^{\nearrow} / \searrow \) on the handheld twice. The handheld should then read: ‘Sub Menu for Menu Option  Delete Data Press Enter’. Press the Enter button on the Apex II scanner. The scanner will prompt the user ‘Erase Data File?’ (Y)es or (N)o’. To erase the data press the letter Y on the Apex II scanner and the scanner will display ‘DATA FILE WAS ERASED!’ To cancel the erase process press the letter N on the Apex scanner and the scanner will display ‘ERASE FILE WAS ABORTED!’ The Submenu screen will again display. To return to the main menu, press the up arrow button \( ^{\nearrow} / \searrow \) on the handheld and the third line of the Sub Menu will display ‘Return to Main’. Press the green (Enter) button and the main menu will display.

Number of Records in Scanner. Select the F4 – Parameters function from the main menu of the Apex II scanner screen. A sub menu for parameters will display. Press the up arrow button \( ^{\nearrow} / \searrow \) on the handheld twice and the unit should display ‘Sub Menu for Parameters Memory. Press Enter’. Press the green (Enter) button. The unit will display the total number of Bytes Remaining of memory followed by the total number of records currently in the Apex scanner. The final screen will display how many additional records can be scanned into the unit.
**View Records Scanned.** To view the records currently scanned with the Apex scanner, go to the main menu and select the menu option used to scan items, which will display the sub menu. If the user is currently at a scan input screen, hold the <ALT> button and press the letter <Q> on the Apex unit and the sub menu for the current menu will display. While the sub menu is displaying, press the up arrow button ▲/▼ on the handheld five times until the sub menu displays ‘Verify Data’. Press Enter’. Press the green (Enter) button, and the User ID screen will display. Enter the User ID previously used and press the (Enter) button. Use the (Enter) button to scroll through the screens. After each record a screen will display: ‘Search for Next Match? (Y/N) Y’, press the (Enter) button to see the next record scanned with the same User ID. When the last record is reached a message will display: ‘Record Not On File’ and then the User ID screen will display. To exit the Verify Data Mode, hold the <ALT> button and press the letter <Q> on the Apex scanner. This will take the user back to the sub menu screen. Press the <ALT> and <Q> again takes the user back to the main menu.

**Clear the currently loaded Apex Project from the scanner.** With the Apex II scanner in the Off mode, hold the <ALT> key and the letter <SPC> key and turn the Apex scanner on. The Apex scanner will reboot and display copyright information.
CHAPTER FIVE
Maintenance Menu
CHAPTER 5

Maintenance Menu

Overview

The maintenance menu allows the user to add, edit or delete the records in the Total Recall databases. Access the maintenance menu by clicking with the [Mouse] or by holding down the [ALT] key on the keyboard and pressing the letter [M]. Move through the maintenance submenus by holding the left mouse button and moving the mouse, or by using the up and down arrow keys on the keyboard. Make the menu selection by clicking on the submenu selection with the mouse or highlighting the selection with the arrow keys and pressing the [Enter] button. Selections can also be made by pressing the underlined ‘Hot Key’ associated with the menu option on the keyboard.

This chapter details each of the submenu options available under the maintenance menu. The maintenance menu is displayed on Fig 5.1.

Following is a brief overview of the submenu options found under the maintenance menu. This overview is followed by a detailed description of each menu option and the functions of each screen.
Customers

The customers option has four submenus: Add New Customer, Individual Customer Records, Copy Customer Settings, and Query Builder. The first, Add New Customer, opens a blank Customer Maintenance window for inputting a new customer. Individual Customer Records displays existing customers with tools to add new customers, edit an existing customer record or delete a customer from the customer database. Copy Customer Settings allows a new customer’s billing options, captions, and other settings to be copied from an existing customer. The last is a query builder that allows a user to build and run queries based on the customer database.

Master Service Codes

This database represents the ‘Master’ table for service codes. This table lists the standard rate to be charged for each service. Every action performed is considered a service to the customer and requires a service code. This option allows the user to add additional service codes, edit existing service codes or delete existing service codes.

Customer Service Codes

Three submenus are available: View Customer Service Codes, Customer Update Utility and Query Builder. Each customer has their own set of service codes and corresponding fees. These codes are entered manually one at a time, copied from the master service codes, or copied from another customer, when the customer was added. This feature allows the user to add additional codes to individual customers only, modify or edit existing customer service codes, and delete codes for individual customers. The customer update utility allows a user to modify customer service codes by copying one customer to a separate customer. The query builder allows the user to build and run queries based on the customer service code database.

Web Security Update

For use with the Total Recall™ Web Module. Two submenus open for Global Customer Update or Individual Customer Update. These allow customer web access levels to be modified either on a per-customer basis or for all customers.

Container Maintenance

Two submenus are available from the container maintenance screen – standard and user defined. Both these options allow the user to view the container database one record at a time. From the container maintenance screen the user can edit the container record and view a listing of any items previously indexed within the selected container. Depending on the security level of the user, the user may or may not be able to delete a record or add a record directly into inventory. Note: If a user chooses to directly add or directly delete a container from this screen, there is NO audit trail, therefore these actions are discouraged. Adding and removing a container through the work order creates an audit trail and is the preferred method.
<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indexed Items In Containers</td>
<td>The ‘Indexed Items in Containers’ menu option allows the user to view the indexed item database record by record. From this screen the user has the ability to edit the information currently in the indexed item record. Depending on the security level, the user may or may not have access to directly add or delete a record from this screen. <em>Note: If a user adds or deletes a record from this screen, it is done without an audit trail. It is highly recommended that this process be done through the work order screen so an audit trail is established.</em></td>
</tr>
<tr>
<td>System ID Maintenance</td>
<td><strong>Fixed Allocation</strong> – The indexed item ID maintenance feature allows the user to change the item ID that has been previously assigned to an indexed item. A unique item ID is a required field in fixed allocation, it is an optional field in dynamic allocation, and can be easily edited.</td>
</tr>
<tr>
<td>Category Codes</td>
<td>When a master or customer service code is entered into Total Recall, the user must assign a category code. There are 13 category codes in Total Recall. This option allows the user to change the description of the category code only. The category assigned determines when and where the service code will be displayed.</td>
</tr>
<tr>
<td>Customer Departments</td>
<td>The department masters option allows a user to add departments to an existing customer. The user can also edit and delete departments from this screen.</td>
</tr>
<tr>
<td>Department Statistics</td>
<td>Total Recall records monthly transaction statistics for every customer. For customers that have their inventory tracked by department, and the department is being entered when a service is performed, at month end Total Recall will record a breakdown of the number of transactions performed for each service within each department. This screen will allow the user to view these statistics and depending on access level, possibly even edit the statistics.</td>
</tr>
<tr>
<td>Facility Layout</td>
<td><strong>Fixed Allocation</strong> – This option allows a user to add locations to the facility by entering a beginning and an ending location for each section of the facility. From this option, the user can specify a location to a specific customer and/or to a specific size of container. This option also allows the user to specify whether or not the locations are currently eligible for use. Dynamic Allocation – This option allows the user to set up the record center warehouse by indicating the size of container and the maximum number of containers per each location. This screen is also used to bill open shelf files that are billed by the linear foot.</td>
</tr>
</tbody>
</table>

210
Record Series
The record series option allows the user to enter information regarding the general categories of records that will be stored. The record series option also allows the user to select a corresponding retention code for each record series established.

Customer Labels
Dynamic Allocation – The customer labels option enables the user to preprint barcode labels for customers. From this option the user can assign a range of labels for a specific customer, print the labels and give them to the customer. The customer can then affix the labels to their containers before they arrive at the record center.

Item Types
The item types option refers to the ‘Type’ of records being stored. These types can be created system wide, customer specific or department specific and then be integrated with a record series. Each item type can have associated reference field captions specific to the type of the record being stored. If the web server module is in use, item types must be associated with all containers and indexed items in inventory.

Route Maintenance
The route maintenance option allows the user to create and maintain specific route and vehicle information to be associated with the execution of repetitive work order fulfillment.

Work Order Description Maintenance
The work order description maintenance screen allows the user to create, review and edit standard work order descriptions. The work order descriptions can be associated with a priority, transportation, due date and due time.

Priority Code Setup
Allows the user to define and maintain priority codes. Transportation codes can be set up and associated with each priority code.
Customers

The customers option allows a user to add a customer, edit an existing customer or delete a customer. There are two options from the customer’s screen: **Individual Customer Records** and **Query Builder**. The **Query Builder** will allow the user to build a query and then export that query to many different formats. Refer to the Chapter 1 query builder for more information on this feature. The **Individual Customer Records** screen is displayed on Fig 5.2 below.

![Customer Maintenance Screen](image.png)

**Fig. 5.2**

The system will automatically display the first record in the customer database when this option is selected. On the initial install, prior to entering any customers, the screen will display blank fields.

There are three (3) ‘Tabs’ or windows on the customer maintenance screen: General, Billing Options and Custom Captions. There are also four (4) rapid entry buttons across the bottom of the screen: Customer Service Codes, Customer Departments, Customer Security, and Customer Delivery Sites. The current customer number and name will always display in the upper portion of the screen.

Following is a brief description of each tab and rapid entry button, followed by the detail of each screen.
General
This window stores basic customer information, including name, billing and delivery addresses, contact names and phone numbers, account representative, and contract renewal date. This window also allows the user to enter a message that will appear on each work order printed for the customer or enter a message the user creating a work order or a message to appear on the customer’s statement.

Billing Options
This window allows the user to set all the billing parameters as well as minimum storage, invoice charges and transportation settings.

Custom Captions
This screen will allow the user to customize the description and reference field captions for each individual customer, allowing easy entry of data.

Customer Service Codes
The service codes screen displays all the service codes for the customer. These codes can be modified by customer. New service codes can be added to or deleted from individual customers. This screen also allows for rate changes by a specified percentage or dollar amount.

Customer Departments
This window allows the user to departmentalize a customer. If a user indicates on the general screen ‘Department Required’ then the departments for the customer must be listed on this screen prior to entering inventory for the customer.

Customer Security
This screen allows the user to set up security within individual customers. If a user indicates ‘Engage Security’ on the defaults screen, a list of authorized persons must be entered on this screen. Only the persons listed on the screen will be authorized to retrieve or remove containers and indexed items.

Customer Delivery Sites
This screen lists additional delivery sites or locations within the selected company.
General Tab

The General ‘Tab’ is the default screen for the customer maintenance option. From this window, customers can be added, existing customer information can be edited, and customers can be deleted. This screen stores the basic customer information. The screen in Fig 5.3 displays the General ‘Tab’, the upper right corner of the screen displays the current customer and the total cubic feet for the customer, provided that cubic size is associated with the containers in inventory. Each field on the screen is detailed in the table immediately following the screen display.

“General Tab” Screen

Customer ID

The customer ID field tracks and identifies the customer throughout Total Recall. This must be a unique identifier for the customer, it can be either alpha or numeric or a combination of both.

Group Identifier

The group identifier field allows for several customers to be billed to a master customer. If a group identifier is entered and the customer is to be billed to this group, check the box to the left of the ‘Bill to Group’ option in the billing options section. Note: A group is simply the customer number of the master account.

Company Name

This field is to enter the customer’s full name, which may appear on the customer’s invoice, work orders and miscellaneous reports.

Billing Address

These fields allow the user to enter the customer’s street address, city, state, and zip code for billing and/or mailing. This information will appear on the customer invoices and mailing labels printed within Total Recall.
Billing Contact
The contact and phone fields allow the user to enter separate contact information for the billing contact.

Default Delivery Address
These fields hold the customer’s delivery address. Additional delivery addresses can be entered on the customer delivery sites rapid entry screen and can be selected when a work order is created. This information will appear on the customer’s work orders printed within Total Recall.

If the default delivery address is the same as the billing address, click the button to the left of the default delivery address once the billing address information has been entered. This will change the default address to match the billing address.

Contact Info
The contact and phone fields allow the user to enter separate contact information for the delivery contact.

Create Date
This field indicates the system date that this record was originally created.

Last Updated
This field indicates the system date that this record was last updated. If the record has not been updated since it was created, this field will display the create date.

Update User ID
This field indicates the user ID of the person who last updated the displayed record. In the case where the record has not been updated since the create date, the user ID of the person creating the record will be displayed here.

Discontinue Service
Allows for the permanent or temporary stopping of services. If this option is checked and a work order is attempted for said customer, the user creating the work order will receive the following message: ‘Service has been discontinued for this client: xxxx – customer name! Do you wish to view this customer’s record?’ Click <Yes> to be brought to this customer’s maintenance screen, Click <No> to abort the work order for this customer.

Notes that print on Client’s Work Orders
This section allows the user to enter special instructions that will print on every work order created for the customer. These instructions will then display on the general ‘tab’ of the work order and can be edited or deleted on an individual work order basis if necessary.

Notes that do not print on Clients Work
This section allows the user to enter special instructions that will not print on work orders created for the customer, but can be set to notify the user of the contents when a work order is created. If information
Orders is entered into this field, and this information is to be displayed automatically when a work order is created for the customer, click on the <Display Notes that Do Not Print On WO’s> field. The user than will acknowledge the work order notes by clicking <OK> before completing the work order.

Notes That Will Print On Customers Statement

Custom Fields

These four fields can be customized to define specific categories or types of customers. Right-click on the field name to change the caption. Use these custom fields to enhance customer query options or master service code copies.

Dept Required

This option, when engaged, requires that a valid department code be entered for every service entered on a work order. If this option is selected, a listing of valid departments must be entered and maintained on the department rapid entry screen.

Perpetually Engage Remote Access

Remote access is a separate module for purchase that works with the databases of Total Recall. This option allows the user to engage the remote access for this customer. When using remote access, the user can select individual customers for whom to create files for, or can engage this feature and create files for all customers that have this option enabled.

Engage Security

This option when checked only allows those persons listed in the security rapid entry screen to retrieve and remove containers or items from inventory.

Verify Requestor’s Security Code on Work Order

If this option is selected, authorized persons with security codes must be set up on the security rapid entry screen. When a work order is created, Total Recall will prompt the user to enter the security code before proceeding. Once the security code has been entered correctly, the work order can be processed, if the security code cannot be entered correctly after four attempts the work order will be cancelled.

Copy TR Box # To Reference 1

If this option is selected, the TR container number will be automatically copied to the reference 1 field when containers are added. This option will front load the TR container number with zeros, to make up a 10-digit number. To not have the TR container number front-loaded with zeros, check the box ‘Do Not pad Ref 1 with 0’s’ in the System Parameters – Work Order Parameters.

Do Not Maintain a

If this option is selected, as non-indexed items are returned from retrieval and placed back into their original container, the container
Perpetual List of Index Items history will be notated and the item will be removed from the indexed item listing. If the item is requested again, a new index will need to be created along with a new label attached to the item.
Billing Options Tab

The Billing Options ‘Tab’ allows for all of the billing set up. It also allows for storage, invoice and transportation charges to be set, Fig 5.4 below displays when the Billing Options ‘tab’ has been selected. The sections on this screen are detailed immediately following the screen display.

![Billing Options Screen](image)

Fig 5.4

**Miscellaneous Billing Options**

**Billable** Click on this option to activate the billing features available in Total Recall. If this option is NOT selected an invoice will not be created at month end.

**Bill to Group** Indicate here if this account is to be charged to a group, and indicate the ‘Group’ in the group field to the right of the customer number field.

**Bill by Department** If this option is selected, invoices will be separated by the customer departments. One invoice is created, but invoices are subtotaled for each department, with a grand total on the final page.

**Rebate Storage** This option allows for storage to be credited back to the customer when containers are permanently removed for customers that bill other than monthly. Storage will be credited back dependent on the pro-rata selection indicated. Group or each will credit back dependent on the number of days remaining in the billing period; all other options will credit back dependent on the number of segments remaining in the billing period.
**Bill Storage In Arrears**

This option when checked, allows the user to bill storage in arrears. This option should only be checked if the contract specifically states that storage cannot be billed in advance, often times this would be governmental accounts only. When this option is selected, Total Recall uses the pro-rata feature in reverse to charge for permanent removals.

**Bill/Process Quarterly**

This option allows for all services and storage to be billed on a quarterly basis. *Note: If this option is selected, storage codes pricing or the cubic feet charges will need to be adjusted accordingly to reflect a three-month storage rate.*

**Show 0 $ Items on Invoice**

Check this box to have all non-chargeable items from the work orders added to the invoices.

**Show Applicable WO #s on Invoice**

When selected, the invoice will display all work orders that had charges assessed. The work order number displays with the creation date of the work order.

**Create An Invoice For Each Closed WO**

Click this option to have an invoice created for each work order as it is closed. If this option is selected, as a work order is closed that has billable services, Total Recall will prompt the user: ‘Invoice nnnnn Created. Do you wish to print it now?’ Click <Yes> to be taken to the invoice print screen, click <No> to print the invoice at a later time.

**Invoice by Dept**

This option creates separate invoices for each department, each invoice having a separate invoice number. If this option is selected and a summary page listing all invoices and the total due is required, click on the ‘Cover Page’ option. After invoices have been printed, from the accounting → print invoice option, print version ‘K’ of the invoice, this will print a summary page for all accounts having the ‘Cover Page’ option selected. *Note: If this option is selected, the ‘Bill by Dept’ option MUST also be selected.*

**Print a Cover Page with Customer’s Invoice**

For accounts marked ‘Invoice by Dept’, this option allows for a summary cover page to be printed listing all invoices and totals due for each department within the customer. After invoices have been printed, from the Accounting → Print Invoice option, print version ‘K’ of the invoice, this will print a summary page for all accounts having the ‘Cover Page’ option selected.
Bill Storage

Allows the user to define the frequency of billing. Available options include: monthly, quarterly, semi-annually and annually. *Note: Storage codes pricing or the cubic feet charges will need to be adjusted accordingly to reflect the storage frequency selected. Adjust the client’s service code price to reflect the 3x, 6x or 12x charge for quarterly, semiannual, or annual billing.*

Billing Month

This option only displays when storage is billed other than monthly. It allows selection of the month when the storage billing will be initiated.

Bill Facility Layout

This option allows for the billing of the facility layout. This feature is often times used to bill by the linear foot for open shelf file storage. If this option is selected, the user will need to build the facility layout indicating the storage code to be used in the ‘Service Code’ field; the total linear feet to be billed in the ‘Cubic (Linear) Feet/Loc’ field and customer number in the ‘Customer’ field. At month end close, Total Recall will multiply the service code price by the total linear feet for the customer to calculate the storage charges.

Bill By Cubic Feet

This feature allows storage to be billed by the cubic foot instead of by the container service code. If this option is selected a ‘Per Foot’ price must be entered. The storage service code prices need to be set at $0.00 to prevent double charges for storage. *Note: Pricing of the cubic feet charges will need to be adjusted accordingly to reflect the storage frequency selected. Adjust the client’s price to reflect the 3x, 6x or 12x charge for quarterly, semiannual, or annual billing.*

Add PR

When billing by cubic feet, check this field to have the pro rata and storage charges added together on the same billing line. If this option is not checked, the pro rata charges will show on a separate billing line.

Bill New Pro-Rata

This feature allows for pro rata charges to be automatically added to work order lines where containers have been added. Pro-rata charges storage for the month the containers are received. When invoices are generated, services are billed in arrears and storage in advance. There are six pro rata options available. Each pro rata option uses the effective date to determine the charge to be assessed to the containers added. *Note: See the Quick Reference Guide titled ‘Pro-Rata Storage’ for more information on this feature along with invoice details for each option.*

The six pro-rata options are listed below.
Pro Rata Group – This option will bill from the effective date through the last day of the month. This option will lump all the like pro-rata charges together on the invoice. The invoice will list the ‘Number of Transactions’ as the number of days remaining in the month divided by the total days in the month, times the number of containers added with the same pro rata code; the ‘Rate’ will display as the price associated with the pro-rata service code; and the ‘Amount’ will be the number of transactions times the rate.

Each – This option will bill from the effective date through the last day of the month. This option will indicate a separate line for each new container added to inventory on the invoice. The invoice will list the ‘Number of Transactions’ as the number of days remaining in the month; the ‘Rate’ will display the daily rate (monthly rate divided by the number of days in the month); and the ‘Amount’ will be the number of transactions times the rate.

1 or .5 by Period – This option will charge storage in accordance with the effective date the container was entered into inventory. This option will charge a full period storage if the container is received during the first half of the billing period, and a half period storage if the container is received during the last half of the billing period. For a monthly account this would bill a full month of storage if the container is received from the first day of the month through the 15th of the month; a half of month of storage would bill to those containers received from the 16th of the month to the last day of the month. For a quarterly account this would bill a full period of storage for any containers received from the 1st month of the billing period through the 16th of the second month of the billing period; a half of period of storage would bill to containers received from the 16th of the second month of the billing period through the last day of the billing period.

1 or .5 by Month – This option is set up for storage billing options other than monthly. This option splits each month into two segments – 1st of the month through the 15th of the month and the 16th of the month through the last day of the month. A quarterly account has six segments; a semi-annual account has twelve segments and an annual account has 24 segments. When a container is added to inventory, pro-rata storage will bill for that segment and all remaining segments within the billing period.

Full – This option will charge a full month or period storage regardless of the effective date associated with the container.

Full Months Remaining – This option is for quarterly and annual customers. This option will bill full months of storage for all months remaining (including current month) in the billing period.
With these two options checked a location will only be billed if there are items scanned to the location listed in the facility layout. When an initial item is assigned to a location, Total Recall captures the customer number and begins billing. When the location is cleared of items, storage will no longer be billed to that customer for that location. Items are processed in and out these locations in the same manner as containers. Billing for locations of this type is based on the customer assigned to the location at the time invoices are created.

**Minimum Storage/Invoice Charges**

This option allows for a minimum monthly storage charge to be set up per customer. To select this option, the user must click the box to the left of this option and indicate the amount of the minimum storage charge and any associated tax, if any in the appropriate fields. At month end close, Total Recall will compare the total amount of storage charges incurred by the customer to the minimum shown, if the total storage charge amount is less than the minimum amount, the invoice will reflect the minimum charge. If the total amount of the storage is more than the minimum, the invoice will reflect the actual storage charges. Total Recall allows for a minimum invoice to be charged is minimum storage is not to be charged. Just as the minimum storage compares actual storage against the minimum, this option if selected, compares the total invoice to the amount indicated in the ‘Minimum Period Charge’ field and charges the greater amount.

The minimum amount entered only applies to storage. Check these box if the minimum amount will apply to all service charges as well as to storage.

The minimum storage charge will only be charged if at least one container is in storage. Check the box if storage is to be charged regardless of whether or not any containers exist in storage.

If ‘Charge Minimum Storage Amount Each Billing Period’ is checked and if the amount billed was less than the minimum amount, this box will fill automatically at month end close.

This check box works in conjunction with the ‘Customer Billed Under Minimum Last Billing Period’ check box. Check this box if no pro rata is to be charged when the customer was under the minimum on the last billing period.
Minimum Transportation Charges

**Base Service Code**
The base service code is the minimum transportation code to be used to compare the total of the work order line charges. *Note: If priority codes are used, transportation codes associated with priority codes take precedence over the base service code.*

**Requirement Codes**
The transportation requirement code is what designates how the transportation is being applied to the work order. The transportation requirement codes are detailed below.

**Requirement Codes 1-3**
Allows for a user to set up a minimum transportation code that will compare the total transportation charges on the work order lines to the minimum transportation code and charge the greater of the two amounts. *Note: Transportation charges MUST be entered into the transportation field on the work order lines or the minimum will not have anything to compare to and no charges will be assessed.*

1 – The minimum transportation code displays in the work order header field, this code can be changed or deleted.
2 – The minimum transportation code displays in the work order header field, this code cannot be changed or deleted
3 – No transportation code will display in the work order header transportation field although the field is displayed and enabled for entry.

**Requirement Codes 4-6**
Allows for transportation to be automatically billed. A related transportation code is set up to bill for all deliveries after a specified number has been met. Work order lines are totaled and the transportation fee is automatically charged. No transportation charges need to be added to the work order lines.

Enter the related transportation code into the ‘Related Code’ field. This related transportation code is the code that will be applied to all work order lines that meet the criteria on the <More> button.

Click on the <More> button and the screen to the right will display. Check to the left of all work order line types that the line transportation charge is to be automatically assessed.
Note: If no transportation charges are to be applied to the work order, the minimum transportation charge MUST be deleted from <Trans> field on the work order header and the line charges must be credited back on the work order by creating an ‘Other’ work order line with a negative number of line transportation charges equal to the number of charges on the current work order.

4 – The minimum transportation code displays in the work order header field, this code can be changed or deleted.

5 – The minimum transportation code displays in the work order header field, this code cannot be changed or deleted.

6 – No transportation code displays in work order header transportation field although the field is displayed and enabled for entry.

**Requirement Code 7**

This requirement code allows for a flat rate transportation fee to be charged on all work orders. The work order header field is displayed on each work order. A transportation code must be entered in the <Trans> field of the work order header, unless the transportation code has associated with the priority code selected for the work order.

**Miscellaneous Options**

**% Of Charge On Late Invoices**

This option allows the application of a late charge as a percentage of the total overdue invoice. To assess late charges to unpaid invoices, access the Accounting Menu → Calculate Late Fees. *Note: Refer to Chapter 8 – Accounting for more information on this feature.*

**$ Prepaid**

If a customer has prepaid their account at the beginning of the billing period, enter the amount in the ‘$ Prepaid’ field. *Note: The prepaid amount does not get automatically deducted from invoices at month end. The prepaid field is used only as a reminder that the customer has an outstanding credit. Refer to the ‘Edit/Create Invoice’ section on Chapter 8 for info on how to apply a credit to an invoice.*

**Bill File Storage Code**

The option allows the user to begin storage charge for an indexed item, once the item is retrieved. Enter a file storage code associated with a charge in this field, as items are retrieved, the storage code will automatically change to the storage code indicated in this field, thus charging a monthly storage charge as long as the item is in inventory.
Contract and Purchase Order Renewal Information

**Contact Name**
Name of the person to be contacted regarding this account.

**E-mail**
This field is for the email address of the contact person.

**Contact Title**
This field is for the title of the person in the contact name field.

**% Standard Rate**
This is the percentage of the service code to be charged for all services and storage. The default is 100.00, meaning that all services and storage will be billed at 100% of the price entered for the customer.

**Contact Phone**
This field is for the main phone number for the contact person.

**Fax**
This field contains the fax number for the company.

**Taxable**
The field is automatically checked when a customer is added, if the customer is a tax-exempt customer, de-select this option prior to importing service codes. The tax rate that will be charged is listed on the individual service code for the product or service code to be taxed. This field must be checked prior to service codes being imported from the master service codes or copied from a customer. If this field is not checked and service codes are imported, any service codes that should charge tax will display the tax rate as 0.00, and no tax will be charged.

**Tax Rate**
This field will automatically display the tax rate associated with the selected customer if a GL tax code has been entered. General ledger tax codes are required for some account packages.

**GL Tax Code**
This field contains the General Ledger Tax Code for accounting package exports. When the tax code is entered here, the coinciding tax rate will automatically be displayed in the ‘Tax Rate’ field. Note: Refer to Chapter 8 – Accounting for information on setting up general ledger tax codes.

**Acct Rep**
This field is to enter the name of the account representative within the record center that sold the account.

**Contract Expires**
This field allows the user to enter the contract expiration date.

**PO #**
This field is available to enter the customer’s purchase order number if one is required. This purchase order number will then appear on the customers invoice.

**PO Expires**
This field is to enter the customers purchase order expiration date if one exists.
Custom Captions Tab

From the **Custom Captions** ‘Tab’, the user has the ability to customize the captions for the description and reference fields, this allows for easy and more accurate data entry. A sample custom caption tab is displayed on Fig 5.5.

![Custom Captions Tab](image)

**Fig. 5.5**

To simplify and create more accurate data entry screens, the user has the ability to change what is reflected on the work order line input screen by customizing the reference fields to reflect the information to be contained within said field. For example, if the customer box number is to be entered in the reference 1 field, by changing ‘Reference 1’ to ‘Customer Box #’, the person doing data entry knows that a box number is to be entered in that field. These custom captions also appear in the report headers, therefore when reports are printed for customers, if the captions have been customized, the report is more easily read and understood by the customer.

On this screen, enter the customized caption for all appropriate fields. Enter an abbreviated version of the custom caption for those areas within Total Recall where the entire caption cannot be displayed. This abbreviation should be no more than six characters.

Any caption entered on the system parameter screen will automatically be copied to the customer caption screen and can be modified from there.
If the <Unique> checkbox has been checked to the right of the reference 1 field, this indicates that the information entered into this field will automatically be verified that it is unique. When creating a work order, if information is entered into the reference 1 field that is not unique for the customer, a message will display that the reference 1 is not unique and cannot be saved.

**Right Justify**
This option allows for the user to right justify the reference 1, 2 and/or 3 fields for containers and reference 1, 2, 3 and/or item Id fields for indexed items within containers. All the reference fields default to left justification, but in the case where the user may want to enter numbers into a reference field, if entered in the first three reference fields or the item id, the user then has the option to right justify these numbers. If right justification is selected, or if the field was previously right justified and then changed to left justification, click on the <Verify Justification> button and Total Recall will adjust all records in the current inventory to the justification selected. *Note: If the web server module is being used, these fields should Not be right justified.*

**Custom Captions to be utilized on the Rapid Input screens**
This option specifies where the reference fields’ custom captions are to be pulled when the Speed Container Add and the Speed Index screens are used. The options available are system caption, set up on the system parameters – custom captions screen; customer captions, set up on the custom captions tab of the customer maintenance screen; department captions, set up on the department tab of the customer maintenance screen; type captions, set up on the maintenance menu – item types option and record series, set up on the maintenance menu – record series option.

**Other Captions**

**Custom Logical**
This field allows the user to enter a caption for the logical check box found in the add container screen. The check box allows for a true or false answer to the caption entered in the custom logical field.

**Copy Captions To Item Types**
This button allows the user to copy the captions from the customer reference fields to the reference fields of an item type. Click on the ‘Copy Captions To Item Types’. The screen in Fig 5.6 will pop up.
Copy Captions To Types Screen

Select to copy either the container captions or the file captions. Change the ‘Update Y/N’ section to ‘Y’ for the item type or types that the captions will be copied to. Click on ‘Copy’ to copy the captions to the item types selected.

Miscellaneous Options

Rapid Order Setup

This button allows the user to set up service codes associated with the rapid order screen used for the web server and the open shelf management screen used in Total Recall. Additional options on this screen control the web server functionality. The screen in Fig. 5.7 displays when this button is clicked.
Retrieval Code
For both the web server rapid order screen and the open shelf management screen this field allows for the user to indicate the retrieval code to be used when either of these screens are used to retrieve a container or item. Codes displayed in the drop down here are those set up for the customer with a category code of ‘1’ – temporarily retrieve a container or ‘B’ – temporarily retrieve an item. This is a walk-a-long field for easy entry of a valid code. Note: If a code is not entered in this field and either of these screens is used, a default code of ‘DEL’ will be assessed to the work order line.

Re-file Code
For both the web server rapid order screen and the open shelf management screen this field allows for the user to indicate the re-file code to be used when either of these screens are used to re-file a container or item. Codes displayed in the drop down here are those set up for the customer with a category code of ‘E’ – return a container or ‘F’ – return an item. This is a walk-a-long field for easy entry of a valid code. Note: If a code is not entered in this field and either of these screens is used, a default code of ‘BIW’ will be assessed to the work order line.

Trans Code
For both the web server rapid order screen and the open shelf management screen this field allows for the user to indicate the line transportation code to be associated with any line item added using these screens. Codes displayed in the drop down here are those set up for the customer with a category code of ‘5’ – storage codes. This is a walk-a-long field for easy entry of a valid code.

Storage Code
For both the web server rapid order screen and the open shelf management screen, this field allows for the user to indicate the storage code to be associated with any item added using these screens. Codes displayed in the drop down here are those set up for the customer with a category code of ‘4’ – storage codes. This is a walk-a-long field for easy entry of a valid code.

Index Code
For both the web server rapid order screen and the open shelf management screen this field allows for the user to indicate the add code to be associated with any item added during a retrieval using these screens. Codes displayed in the drop down here are those set up for the customer with a category code of ‘3’ – add container code or a category code of ‘D’ – add indexed item code. This is a walk-a-long field for easy entry of a valid code.

Allow in-house users to add new items
For the open shelf management screen, this field determines whether or not a user has the ability to add indexed items to Total Recall as that item is being retrieved.
**Apply strict validation rules on web rapid order screen**

For web server rapid order screen only. Check this box if you do not want to allow the users to request an indexed item that is currently showing as being retrieved. If this option is selected, when an item is retrieved, it will show as ‘**Checked Out**’ in the select column on the result screen of the web server with the retriever name and date out listed in the status/comments column.

If this is **Not** checked, when a retrieved item is displayed as a search result, the select column will have ‘**Retrieve**’ enabled, the status/comments column will display a comment that the item is out and indicate the name of the retriever and the date the item was retrieved.

**Apply strict rules on web delivery setup screen**

For web server module only. Check this boxes if the delivery address on the web server is not to be modified. If this field is not checked, the delivery address will be displayed so that the user can modify the delivery address.

Regardless of whether or not this field is checked, any additional site addresses are available for delivery.

**Do Not Assign Storage Code to New Containers on Web**

Check this box if you do not want web customers to have the ability to assign the storage code of new containers added on web orders. The storage code can then be assigned once the container has been added on the work order.

**Include Long Descriptions**

For the Web Server Module only. Check these box if the description field long descriptions are to be included when the description field is searched.

**Auto Assign TR Container # on Web Imports**

Web server module only. Check this box if pre-assigned container labels are not issued to the customer and the customer will be adding containers using the web server. *Note: If this option is selected, items cannot be added to the container during the same session that the container is added. Once the containers are received and verified at the record center, labels are printed and affixed to the containers. Items can be added once the containers are in inventory.*

**Auto Assign TR File # on Web Imports**

Web server module only. Check this box if pre-assigned item labels are not issued to the customer and the customer will be adding items using the web server. When the web order is imported each item will be assigned the next available TR item number, this number will track the item throughout Total Recall. As with indexing items it is not necessary to print and affix labels to all indexed items.
**Route**

This field allows the user to assign each customer to a specified route. This route will print on the work order, so that the dispatcher can separate work orders by the routes they have been assigned.  

*Notes: See route maintenance later in this chapter for more information on setting up routes.*

**Track Cust. Box #**

This option allows for box numbers to be automatically assigned and printed on pre-print barcode labels. With this feature engaged, when a barcode label is scanned that has a box number associated, the box number will automatically be placed in the reference 1 field. This feature is also available if containers are to be entered manually from the work order – add container screen.

To activate this feature for pre-print container labels:

Check the box to the left of the ‘**Track Client Box #**’ field.  
Click on the ‘**Client Box # Setup**’ button and the screen in Fig. 5.8 will display.

![Reference 1 Tracking Setup](image)

**Check to Auto Assign Next Number**

If the customer box numbers are to be automatically assigned and tracked, check the box to the right of the ‘**Check to auto assign next number**’ field. After pre-print labels have been assigned, Total Recall will automatically update the `<**Next Number**>` field.

If the customer box number are not to be automatically assigned, do not check this box and as pre-printed labels are added, the user will be able to enter the next number to be assigned, Total Recall will automatically calculate the ending box number.

**Next Number**

Enter the next number to be assigned to the next box to be added to inventory in the `<**Next Number**>` field. This number will automatically update every time pre-print labels are assigned.
**Total digits for Numeric Portion**

In the `<Total digits for numeric portion>` enter total number of digits to be included in the Box Number. If the box number has fewer digits than what is indicated here, the number will be preceded by zeros.

To activate this feature for containers entered manually through a work order:

Do not check the box to the left of ‘Track Client Box #’ field. Click on the ‘Client Box # Setup’ button and display the previous screen. Check to auto assign the next number, indicate the next number to be assigned and enter the total number of digits for the numeric portion of the box number.

As add container lines are added to a work order, skip the reference 1 field and as each line is saved, the customer box number will be automatically entered.
Customer Service Codes

The ‘Customer Service Codes’ button allows the user to customize service code pricing for individual customers. It also allows for adding or deleting service codes on an individual customer basis. A screen similar to the one on Fig 5.9 displays when the customer service codes button is selected.

**Header Fields**

**Customer**  The current customer ID and name will display here. Enter a different customer ID to view their service codes.

**Service Code**  This option will allow the user to view all customers that have a specific service code assigned to them. Enter the service code name and hit [Enter] on your keyboard. The grid will now show all customers that have that service code assigned to them.

**Edit Service Code**  Enter a service code name and press [Enter]. The ‘Edit Service Code’ Screen will pop up for that service code provided it was assigned to the specified customer on the customer field.

**Grid Area**  The ‘Grid Area’ of the service codes screen lists all the service codes for the selected customer. Scrolling through this screen can be done by the scroll bar on the right side of the screen or by using the arrow keys on the computer keyboard. The scroll bars and arrow at the bottom of the grid allow the user to scroll across the listing of records. Click the right mouse button to view a list of options for the service code screen. The window on Fig 5.10 will pop up.
Add New Record  Click on the <Add New Record> option to add a service code to one specific customer only. (To add a service code to all customers - see master service codes later in this chapter). A data entry screen will display allowing the user to enter the appropriate data. Once the data has been entered, click on <Save> to add this service code to the existing customer service code list or click on <Exit> to discard this service code and exit the entry screen. A screen similar to the one below displays when this button is clicked.

Display Full Screen With Selected Record  Click on the <Display Full Screen With Selected Record> option to modify the currently selected service code. An entry screen will display the current information found in the record. Make any modifications necessary to the record. These modifications will only affect this customer. Once editing has been completed, simply click the <Save> button to keep the changes made or click <Exit> to discard the changes and return to the original record.

Print Customer Service Code Report  Allows the user to print the current report pertaining to the service codes assigned to individual customers.
Delete: Right-click on the service code record to be deleted. Select the <Delete Selected Record> option. A prompt will display: ‘Delete Service Code XXX?’ Click <Yes> to proceed with the service code deletion or <No> to keep the customer service code.

Rate Increase: Allows the user to systematically increase service code rates by either a specific dollar amount or by a percentage. The screen on Fig 5.12 will display when the <Rates Increase> option is selected.

Fig 5.12

The user will select to change the rate by a specified percent or a specified dollar Amount. Enter the percentage or the dollar amount in the field specified. Click on the <Proceed> button. The ‘Globally Update Customer Service Codes’ screen will display similar to a spreadsheet, shown on Fig 5.13.
The user has the option to decide which customer service codes are to be updated, the ‘Update Y/N?’ column defaults all the lines to ‘Y’. This column can be changed to ‘N’ if the price is not to be updated. Once any changes have been made, click the <Save> button and the prices will be immediately updated.

**Tax Increase**

Allows the user to systematically increase tax rates by a percentage. The screen on Fig 5.14 will display when the <Tax Increase> option is selected.

The user will select to change the rate by a specified. Enter the percentage in the field specified. Click on the <Proceed> button. The ‘Globally Update Customer Service Codes’ screen will display similar to a spreadsheet, shown on Fig 5.13 above. Follow the same procedures to select the service codes that will receive the tax rate change.
Customer Departments

The **Customer Departments** button allows the user to add, edit or delete departments for a customer. If the ‘Department Required’ option was selected on the general tab, valid departments must be entered on this screen. Departments can each have separate custom captions reference fields associated with them. If the department has had the reference fields customized, these individual department customized fields will display instead of the customer custom captions. Fig 5.15 shows a sample of the customer departments screen.

![Customer Department Screen](image)

**Fig 5.15**

**Header Fields**
- **Customer** The current customer ID and name will display here. Enter a different customer ID to view their departments.
- **Edit Department** Enter a department name and press [Enter]. The ‘Department Maintenance’ Screen will pop up for that department provided it was assigned to the specified customer on the customer field.
- **Grid Area** The ‘Grid Area’ of the department screen lists all the departments for the selected customer. Scrolling through this screen can be done by the scroll bar on the right side of the screen or by using the arrow keys on the computer keyboard. The scroll bars and arrow at the bottom of the grid allow the user to scroll across the listing of records. Click the right mouse button to view a list of options for the department screen. The window on Fig 5.16 will pop up.
Add New Record: Click on the **Add New Record** option to add a department. A data entry screen will display allowing the user to enter the appropriate data. Once the data has been entered, click on **Save** to add this department to the existing customer department list or click on **Exit** to discard this department and exit the entry screen. A screen similar to the one in Fig 5.17 displays when this button is clicked.

Department Maintenance Screen:

- **Customer #**: This field displays the customer number selected automatically.
- **Customer**: This field displays the customer name automatically.
- **Department ID**: This field is to enter the department ID to identify the department.
- **Department Description**: This field is an optional field to enter a description of the department entered previously, including address, contact name, telephone number, E-mail, etc.
Captions Tab

Once a department has been entered, the user has the option to specify custom captions for the reference fields for this department. The screen on Fig 5.18 can be accessed by clicking on the captions tab from the 'add' or 'edit' department screens.

From this screen the user can enter both container and indexed items custom captions for the reference fields. If captions are entered on the department level, they will overwrite the customer and/or system wide captions.

Display Full Screen With Selected Record

Click on the <Display Full Screen With Selected Record> option to modify the currently selected department. An entry screen will display the current information found in the record. Make any modifications necessary to the record. Note: The department ID cannot be edited on this screen, to modify the department ID, see chapter 9 - The Utility Menu – Department ID Conversion. Once editing has been completed, simply click the <Save> button to keep the changes made or click <Exit> to discard the changes and return to the original record.

Print Department List Report

Allows the user to print the current report pertaining to the departments assigned to individual customers.

Delete Selected Record

Right-click on the department record to be deleted. Select the <Delete Selected Record> option. A prompt will display: ‘Delete Department XXXXXX?’ Click <Yes> to proceed with the department deletion or <No> to keep the customer department.
Customer Security

The **Customer Security** button allows the user to set up authorized personnel at the customer’s site to do retrievals and permanent withdrawals. If you select to ‘Engage Security’ on the general maintenance screen, you must enter the authorized persons here, these are the only persons whom will be allowed to check out containers and/or files. You can also enter authorized persons here and not have ‘Security Engaged’ on the general tab. This will allow for the user to override and enter a person not currently on the list for a retrieval or withdrawal. This screen also allows for entering authorized persons for the web Server module currently available through Total Recall. A screen similar to the one displayed Fig 5.19 will appear when this tab is selected.

![Customer Security Screen](image_url)

**Fig. 5.19**

**Header Fields**

- **Customer**: The current customer ID and name will display here. Enter a different customer ID to view their security settings.
- **Enter Authorized Individual**: Enter an authorized security name and press [Enter]. The ‘Department Authorization Maintenance’ Screen will pop up for that individual provided it was assigned to the specified customer.
Grid Area  The ‘Grid Area’ of the security screen lists all the persons authorized for the selected customer. Scrolling through this screen can be done by the scroll bar on the right side of the screen or by using the arrow keys on the computer keyboard. The scroll bars and arrow at the bottom of the grid allow the user to scroll across the listing of records. Click the right mouse button to view a list of options for the security screen. The window on Fig 5.20 will pop up.

Security Option Screen

Add New Record  Click on the <Add New Record> option to add a security. A data entry screen, similar to the one in Fig 5.21, will display allowing the user to enter the appropriate data. Once the data has been entered, click on <Save> to add this security to the existing customer security list or click on <Exit> to discard this security and exit the entry screen.

Fig 5.20

If you have not purchased the web server module, you will not need to enter information in the web setup fields. If the customer is departmentalized, you have the option to assign different security authorizations to the departments.

Customer #  This field displays the customer number of the currently selected customer.

Customer  This field displays the customer name of the currently selected customer.
Department ID
This field has a drop down menu to select a department, if the person being added is to be specific department only, indicated the department.

Authorized
This field is for the name of the authorized person.

Security Code
This field is for the user to enter a security code if the customer requires a user accessing records to give a security code.

E-mail
This field is for the E-mail address of the authorized person.

Web Setup

Web User Id
Enter the web user identification in this field. This is the user name that the individual at the customer location will use to log on to the web server. Note: This field must begin with an alpha character, from 3-10 characters without spaces.

Password
Enter the web user’s password in this field. This is the password that the user will enter to log on to the web server from the remote location. Note: This field can be from 3-10 characters without spaces.

Edit Records On Web
Allows this user to make changes to records through the web module

Edit Series On Web
Allows this user to make changes to record series through the web module

Web Security
The web security button allows the user to set up additional security options for the authorized person. The screen on Fig 5.22 will display when you click on this button.

Web Security Screen

![Web Security Screen](image)

Fig 5.22
The tabs on this screen (User, Add, Request, Query, and Reports) coincide with the same options shown on the web module. The menu options on this screen are the same options that will show on the web when the specific tab is selected. Check all the boxes that this person will be authorized to perform. For example: in the above screen, this person will be allowed to view and print all reports in the report menu except for the inventory report.

**Display Full Screen With Selected Record**
Click on the `<Display Full Screen With Selected Record>` option to modify the currently selected security. An entry screen will display the current information found in the record. Make any modifications necessary to the record. Once editing has been completed, simply click the `<Save>` button to keep the changes made or click `<Exit>` to discard the changes and return to the original record.

**Print Authorized Individual List Report**
Allows the user to print the current report pertaining to the security assigned to individual customers.

**Delete Selected Record**
Right-click on the security record to be deleted. Select the `<Delete Selected Record>` option. A prompt will display: ‘Delete Security XXXXXX?’ Click `<Yes>` to proceed with the security deletion or `<No>` to keep the customer security.
Customer Delivery Sites

The lists all locations or ‘Sites’ within the selected customer. If the customer has only one location, it will not be necessary to enter information into this screen. Fig 5.23 shows the screen that displays when the customer delivery sites button is initially selected.

Customer Delivery Sites

Header Fields

Customer  The current customer ID and name will display here. Enter a different customer ID to view their delivery sites settings.

Edit  Enter a customer site and press [Enter]. The ‘Customer Sites Maintenance’ Screen will pop up for that site provided it was assigned to the specified customer.

Site  The ‘Grid Area’ of the customer sites screen lists all the persons authorized for the selected customer. Scrolling through this screen can be done by the scroll bar on the right side of the screen or by using the arrow keys on the computer keyboard. The scroll bars and arrow at the bottom of the grid allow the user to scroll across the listing of records. Click the right mouse button to view a list of options for the customer delivery sites screen. The window on Fig 5.24 will pop up.
Add New Record

Click on the <Add New Record> option to add a customer site. A data entry screen, similar to the one in Fig 5.25, will display allowing the user to enter the appropriate data. Once the data has been entered, click on <Save> to add this site to the existing customer site list or click on <Exit> to discard this site and exit the entry screen.

Fig 5.25

Add a Site ID, Site Description, Delivery Address, City, State, Zip and both a Phone and Fax number and a Route ID if pertinent. Click on <Save> to Add this Site to the listing or click on <Exit> to discard this new Site.

Display Full Screen With Selected Record

Click on the <Display Full Screen With Selected Record> option to modify the currently selected site. An entry screen will display the current information found in the record. Make any modifications necessary to the record. Once editing has been completed, simply click the <Save> button to keep the changes made or click <Exit> to discard the changes and return to the original record.

Print Listing Of Delivery Sites Report

Allows the user to print the current report pertaining to the delivery sites assigned to individual customers.

Delete Selected Record

Right-click on the delivery sites record to be deleted. Select the <Delete Selected Record> option. A prompt will display: ‘Are you sure you wish to delete XXXXXXX?’ click <Yes> to proceed with the site deletion or <No> to keep the customer delivery site.
Add a Customer

When the customer maintenance screen is accessed initially, the navigation tool bar is activated. To add a customer, click on the <ADD> button. The title of the screen will change to “Input New Customer”, and all the fields will be blank. Enter a unique customer number and then enter the requested information, using the [ENTER] or [TAB] key, or clicking in the fields with the <Mouse> to move between fields. Refer to the previous pages for details on field definitions. After completing the field entry on the ‘general’ window, click on the <SAVE> button to add the customer to the current database. When the user saves the new customer, a prompt will display on the screen: “Do you wish to add the Master Service Codes to this Customer?” Click on <Yes> to add service codes, the user will then have the option to add the master service codes or copy service codes from an existing customer, or click <No> to not add the master service codes. Note: The master service codes are the ‘standard’ service codes. Once added you can modify, add or delete these codes. If these service codes are not added, the service code tab will be blank and the codes will need to be added one at a time.

Once the user saves the basic information on the general ‘tab’, the remaining two ‘tabs’ and the four rapid entry buttons will need to be filled to complete setting up this new customer. These ‘tabs’ and buttons are explained in detail on the previous pages.

Edit a Customer

To edit the information for a customer, select the record by using the <First>, <Previous>, <Next> or <Last> buttons in the navigational tool bar or using the <Search> button. With the customer to be edited displayed on the screen, click on the <Edit> button in the tool bar at the bottom of the screen. The screen title will change to ‘Edit Existing Customer’. Use the <Mouse> or <Enter> key to move to the fields that need to be modified. After all changes have been made, click on the <Save> button to keep the changes. This will save the current information and change the screen title back to ‘Customer Maintenance’. To cancel the changes and return to the previously displayed data, click on the <Revert> button.

Delete a Customer

To delete a customer from the database, select the record by using the <First>, <Previous>, <Next> or <Last> buttons in the navigational tool bar or using the <Search> button. With the customer to be deleted displayed on the screen, click on the <Delete> button in the tool bar at the bottom of the screen. Total Recall will prompt the user: ‘Do you want to delete this record?’ to delete this customer record, click on <Yes>. To retain this record in the current database, click the <No> button.
Customer Types

The Customer Types button allows the user to specify the ‘type’ of records stored. If the Total Recall Web server module is being used, item types MUST be set up for all records that are to display on the web server. Item types are typically ‘BOX’ and ‘FILE’.

Customer Item Types

From the Rapid Data Maintenance Screen, click <Add> to create a new item type. Complete the Item Type Maintenance dialog box, then click <Save>. Refer to Item Type Maintenance later in this chapter for more details on completing this dialog box.

Item Types are associated with Storage Codes to provide an additional check in ensuring items are billed properly. The Service Code Maintenance window has radio buttons to select the type of item typically associated with that code. Refer to the section below on Service Code Maintenance.
Master Service Codes

Each action performed on behalf of a customer is a service provided for that customer. Total Recall records and tracks these services according to a service code. This menu option allows the master service codes to be defined, and the standard prices and costs to be set.

Fig. 5.26 shows the master service code screen, followed by a description of each field and instructions on how to add, edit and delete service codes.

**Service Code**

This is a three (3)-character code that identifies the service. This service code can be alpha, numeric or a combination of alpha and numeric. Total Recall ships with some basic master service codes. Choose to start with these and build from them or create your set of master service codes.

**Description**

This field contains a brief description of the service code. This description does display when users are creating work orders and as a description of the service on the customers’ invoice.

**Category Code**

The category code field is a drop down menu of 13 options, which group similar service codes together. Each service code must be assigned a category code, this category code ensures that the service displays on the appropriate work order screens.
Price  Enter the standard price that you will charge for the specified service in this field. Note: If services are being billed by the cubic foot, this price should be the price per cubic foot, with the exception of storage charges. If storage is being billed by the cubic foot, as one line on the invoice, this field should be left blank and the price per cubic foot is entered under billing options ‘tab’ of the customer maintenance screen. If storage is billed by the container size by the cubic foot, then a cubic foot price will be entered here and NOT in the billing options.

More  The ‘More’ button allows for the setting of price breaks. Price breaks will be discussed later on this chapter.

Item Cost  This is an optional field to enter the actual cost of the specified service.

Tax Rate  If this is a taxable service code, enter the tax rate for the code in this field. Enter the rate as a percentage, for example 6% is to be entered as ‘6.000’.

G/L Acct #  This field is for the general ledger account number for users that are exporting invoices to certain accounting packages.

Cubic Size  This field is only pertinent to container storage codes – category 4 codes. Enter the cubic size associated with the storage code category 4. If a miscellaneous size storage code is entered, this field can be left blank, the user would then enter the cubic size on the work order line.

Bill by Cubic Feet  This field, when selected, charges the service by the cubic foot of the container in storage. If this option is selected the price field should reflect the price to be charged per cubic foot.

Default Days  This field is for the number of days a container should be stored when retention codes are entered. This field can also be used to enter the number of days until a container or an indexed item should be returned from a temporary retrieval. This will automatically create a due date associated with the retrieved item.

Type  This field allows the user to associate an item type to a storage service code or to an add service code. Item types identify the ‘type’ of item being stored such as ‘BOX’ or ‘FILE’. Item types are required if the web server module is in use.
**Related Storage Code**

**Dynamic Allocation Only** – This field is only enabled when a category ‘3’ (Add Container) or ‘D’ (Add Item) service code is selected. The related storage code relates a new add service code to a storage code. Using a bar code scanner to enter new containers, Total Recall will first look to see if there is a related storage code to determine the monthly storage, if this relationship does not exist it continues through the hierarchy to determine the monthly storage code. Note: See Chapter 4 – Scanning, for more information on the scanning hierarchy.

**Related Add Code**

**Dynamic Allocation Only** – This field is only enabled when a category ‘E’ (Return Container) service code is selected. The related add code relates a return of a container to an ‘add new container’ code. As a user scans containers into the warehouse, any containers that are not returns, will be added as a new container using this related add code.

**Related Pro-rata Code**

**Dynamic Allocation Only** – This field is only enabled when a category ‘4’ (Storage Code) service code is selected. If a related pro-rata code is entered in this field, as containers are added to inventory and if a pro-rata charged is to be assessed, it will be added to the work order line using this pro-rata storage code. The related pro-rata code allows for the pro-rata storage to be separate from the monthly storage on the invoice.

**More**

The `<More>` button is only available when a category ‘4’ (storage code) service code has been entered. The `<More>` button allows the user to set up default activity codes dependent on the priority of the work order and the storage code associated with the item listed on the work order Line. The screen on Fig 5.27 displays when the `<More>` button selected.

![Related Codes For Service Code (SR1 - Record Storage - 1.2) Screen](image)

**Fig. 5.27**
Up to seven (7) priorities can be setup on this screen. These priorities are setup and defined under the maintenance menu → priority code setup.

Enter a priority code in the ‘Priority’ field. Note: This priority must be a priority setup in the priority setup screen. Enter corresponding service codes associated with the activities listed. Note: Only container activities need to be entered for a container storage code and indexed item activities for indexed item storage codes. Additional miscellaneous codes (category 9) can be associated in the ‘Additional Related Codes’ fields.

The transportation code entered on this screen is for the work order line transportation code. Enter a code here only if the line transportation code changes depending on the storage code of the item. Note: Codes entered on this screen take precedence over any other codes entered on the work order screen.

<table>
<thead>
<tr>
<th><strong>Storage Type</strong></th>
<th>Allows the user to specify if this service code will be used for only containers, only indexed items or both. This will prevent from having a code that is strictly for containers to be used for items and vice versa.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Web Service</strong></td>
<td>Checking this box activates the service code on the web server. This checkbox may or may not be enabled depending on the service code category. Note: Only those with web server integration will be able to utilize this field.</td>
</tr>
<tr>
<td><strong>Transaction History</strong></td>
<td>When month end close is completed each month, statistics are generated reflecting the number of transactions of each service code performed in that month. These statistics are then displayed in the transaction history for each month.</td>
</tr>
<tr>
<td><strong>Create Date</strong></td>
<td>This field reflects the date that this service code was originally created.</td>
</tr>
<tr>
<td><strong>Update Date</strong></td>
<td>This field reflects the last date that the service code was modified or updated. If it has not been updated since the creation date, it will reflect the same date as the ‘Create Date’.</td>
</tr>
<tr>
<td><strong>Update ID</strong></td>
<td>This field reflects the User ID of the person logged into Total Recall when the last update was done. If the code has not been updated since it was created, it will reflect the User ID of the user creating the service code.</td>
</tr>
<tr>
<td><strong>Copy Service Code</strong></td>
<td>Copy a specific code to selected customers. Click the &lt;Copy SC&gt; button, and then select the customers to copy the service code to. Modify as necessary. Click &lt;Save&gt; to copy.</td>
</tr>
</tbody>
</table>
Add a Service Code

When Total Recall displays the service code maintenance screen, only the navigation tool bar is active. To add a service code, click on the <Add> button. Total Recall will display a blank entry screen with the cursor active in the service code field. Enter a unique three-character/digit service code. Continue by entering information in the remaining fields using the [ENTER] or [TAB] key to advance between the fields or use the mouse to click through the fields. To add the service code to the master service code list, click on the <Save> button on the tool bar. The following prompt will display: ‘Do you wish to add this service code to all customers?’ Click on <Yes> to add the service code to all existing customers, Click <No> to add the service code to the master service code list but NOT to the existing customers, or click <Cancel> to return to the input screen without adding the service code. From the input screen, click on the <Revert> button if you do not wish to add this new service code.

Edit a Service Code

Select a service code to be edited using the <First>, <Previous>, <Next> or <Last> buttons or by using the <Search> button to locate the service code to be modified. With the record to be modified displayed on the screen, click on the <Edit> button. This will enable the fields to be modified. Once field(s) have been edited, click on the <Save> button to keep the changes or click on <Revert> to discard the changes. Once the save button has been clicked, Total Recall will prompt the user as to whether the changes are to flow downward to existing customers, if the changes are to flow downward click <Yes>, if the changes are to be made only to new customers added click on <No>.

Delete a Service Code

Select a service code to be edited using the <First>, <Previous>, <Next> or <Last> buttons or by using the <Search> button to locate the service code to be deleted. With the record to be deleted displayed on the screen, click on the <Delete> button. A screen displaying the following prompt: ‘Do you wish to delete this Service Code for all customers?’ Click on the <Yes> button to remove the service code from the master service code list and all customers. A message prompt will alert the user: ‘This Service Code will not be invoiced for any Current Work Orders. Do you Wish to Continue?’ to confirm the deletion of the service code. Click <No> to retain this service code in the listing.
Choose this option to view the complete list of Master Service Codes in a browser layout. Enter the code in the Show/Edit Service Code box to quickly select. Right-click to view options, or click the <Edit> or <Add> buttons. The Service Code Maintenance window will display.
Customer Service Codes

The customer service code option has four submenu options: View Customer Service Codes, Customer Update Utility, Rapid Data Maintenance Screen and Query Builder. The View Customer Service Codes option allows a user to add, edit and delete a service code for a specific customer. The Customer Update Utility allows the user to modify a customer’s service codes with another customer’s service codes. In the Rapid Data Maintenance Screen the user can view all of the service codes for a specific customer and allows for rapid entry and editing. The Query Builder option allows the user to run queries on the customer service code listing, refer to the Chapter 1 → Query Builder for more information on this feature.

View Customer Service Codes

This option allows the user to make changes to specific service codes for individual customers. This screen can also be activated from the customer maintenance screen, service code tab. A screen similar to the one in Fig. 5.29 displays when this option is selected.

![Customer Service Code Maintenance](image)

The fields in this screen perform the same function as the fields in the Master Service Codes screen with the exception of the ‘Block Price Changes From Master’ field. However, any changes, additions, or deletions of service codes in this screen will only affect the selected customer. Please refer to the master service code section of this chapter for a description of these fields.

Block Price Changes From Master

When prices are changed for this service code at the master code level, if this box is checked, the price changes will not affect this customer’s service code.
**Price Breaks**  Total Recall supports three price breaks methodologies: Absolute, Progressive and Gross. These options are available on an invoice and/or work order basis. To access the price breaks screen select the code that will be associated with the price breaks from either the master service code screen if the code is to be applied to all customers or the customer service code screen if the code is to be applied to a single customer only. Click on the ‘More’ button to the right of the <Price> field. The screen in Fig 5.30 will display.

**Price Break Screen**

![Price Break Screen](image)

**Progressive**  Progressive price breaks are on an invoice level only and will NOT price break by department. This option will allow the user to set up to 40 price breaks. The progressive price breaks allow an user to set a price break each with different pricing levels for each price break.

**Gross**  Gross price breaks allow the user to charge a ‘grouped’ price dependent on quantity, for a service code. This option is only available on a work order level. This option will allow 40 price breaks and does NOT price break by department.

**Absolute**  Absolute price break by invoice allows up to 8 price breaks. Absolute price breaks on work orders allows for up to 40 price breaks. This option charges a ‘price each’ dependent on volume.

*Note: Refer to the Quick Reference Guides on price breaks for detailed examples of each price break methodology.*
**Customer Update Utility**

This option allows a user to update a customer’s service codes by copying service codes from one customer to another customer. The window on Fig. 5.31 displays when this option is selected.

From this screen the user would enter the customer ID number of the customer to be updated in the ‘**Customer Which Should be Modified**’ field. A drop down listing may be accessed by clicking on the down arrow to the right of the field, select the customer by highlighting and double clicking with the mouse.

The user would then enter the customer ID of the customer service codes to be copied in the ‘**Customer Which Should be Used as Standard**’ field.

The user then needs to decide to update the customers current listing with the customer indicated, or if the customer to be updated codes need to be cleared and all new codes replaced with those of the selected customer. If all service codes are to be cleared and replaced, click on the checkbox next to: ‘Delete all Service Codes from Customer prior to commencing update’. If the service codes are just to be updated, do not check this box.

Click on the `<Copy>` button to run this utility. Upon completion the screen will prompt user: ‘Update Complete’ click on the `<OK>` button, the service codes have now been updated.
Containers

The container maintenance screen shown below allows the user to view the entire container record and edit the record as necessary. There are two tabs on this screen: the ‘Location/Container Information’ tab and the ‘Indexed Items in Container’ tab. When viewing a container on this screen, the user can click on the ‘Indexed Items in Container’ tab and view indexed Items that are currently be indexed within the container. The screen on Fig 5.32 shows the container maintenance screen in the edit mode.

**Location / Container Information**

This tab allows the user to view and maintain data associated with the disposition and location of their containers. It provides convenient “at-a-glance” field information. The following details the fields on this screen.

**TR Cont #**
The Total Recall container number is the unique tracking number that tracks the container throughout Total Recall.

**Location**
The ‘Location’ field displays the current location of the container. The location setup is customizable in the system parameters.

**Store Code**
This field displays the storage code that is assigned to the container. If containers are being billed for storage by the number of containers, this field contains the storage code associated with the storage charge.
**Access Cnt**  This field displays the number of times the container has been retrieved since it was added to inventory.

**Cubic Feet**  This field displays the cubic footage of the container. The container is usually assigned cubic feet at the time it is added to inventory, however, this field can be updated at a later date.

**Customer**  The customer section is made up of two fields and a customer search button. The first field is the customer number field; the second field is the customer name as entered on the customer maintenance screen. The Search button activates the ‘Locate Customer’ search screen. Click on this button to quickly locate a specific customer.

**Dept:**  This field displays the department that the container is associated with, if a department was associated with a department.

**Box Description**  This field allows for a brief container description. This can be entered at the time the container is added to inventory or at a later time through this screen or the rapid data maintenance screen.

**Type**  This field displays the ‘Type’ associated with the container displayed. Types identify the ‘Type’ of item being stored typically the item type for a container is ‘BOX’. Item types are required if the web server module is in use.

**Retention Information**

**Effective**  This date reflects the date the container was added to inventory.

**From Date**  This date field displays the beginning date range for the records stored in the container. This is an optional field.

**To Date**  The ‘To Date’ field represents the last date for the records stored in the container. If retention codes are being used, this date is used to calculate the expiration date. This is an optional field.

**Expires**  This field is for the expiration or destruction date of the container. If retention codes are being used, the expiration date is automatically calculated; otherwise a valid date can be entered as the expiration date.

**Verified**  This field displays the verification date if the item has been verified in inventory using the reconcile feature. Note: See Chapter 4 – Scanning for more information on the reconcile feature.
**Container Index Information**

This section contains user-defined Reference Fields. Each container can have up nine (9) index fields. These index fields allow a user further identify a container or to quickly locate a container. These field captions can be customized on a customer, item type or department basis to represent the data contained within that field.

**Audit Information**

**Create Date**  The date reflects the date this record was created to add this container to inventory.

**Update**  This field reflects the last date that this container record was updated. If it has not been updated since the creation date, it will reflect the same date as the ‘Create Date’.

**Update ID**  This field reflects the user ID of the person logged into Total Recall when the last update was done. If the container record has not been updated since it was created, it will reflect the user ID of the user logged in at the time the container was added.

**Last WO**  The ‘Last WO’ field displays the work order number where the container last had activity.

**Retrieved**  This field indicates whether or not the container is currently retrieved. A check in the box indicates the container is retrieved, no check mark indicates the container is not currently retrieved.

**Retrieve Date**  This field displays the date the container was retrieved if the ‘Retrieved’ box is currently checked.

**Contact Name**  If the container is currently retrieved, this field displays the name of the person who currently has the container retrieved, if this information was entered at the time of retrieval.

**Phone**  If the container is currently retrieved, this field displays the phone number of the person who retrieved the container, if this information was entered at the time of the retrieval.
Click on the **Auto Edit Off** button to activate the auto edit feature and the button will change to **Auto Edit On**, the user than can click on the **TR Con** button or **Ref 1** button, and the ‘Locate Items’ screen displays. Note: The **Ref 1** button search button may be customized depending on the system captions. From this screen the user will enter either the TR container number if the **TR Con** button was clicked or if the customer number and the reference 1 if the **Ref 1** button was clicked. Click the **Search** button and Total Recall will locate the container and display the container on the screen in the edit mode. If the information entered in the ‘Locate Items’ screen does not produce a valid match, a message prompt will display: ‘Container Not Found’, click **OK** to acknowledge the message and the return to the container maintenance screen. If the record was located, modify the container record and click on the **Save** button to save the changes or **Revert** to discard the changes and return the record to the original status.

**Print**

The **Print** button allows the user to print the container history. The container history shows all the history of the container and all indexed items within the container.

**Add Container**

It is **Not** advisable to add a container on the container maintenance screen, because it does not provide for an audit trail. All containers should be entered through a work order. This will bill and provide an audit trail. If it becomes necessary to directly add a container through the container maintenance option, the user must have authorization through the ‘**Administrative Power Feature**’ to ‘**Directly Add**’ a Container. Note: Refer to Chapter 10 – Security – Add/Edit Individual Security Setups, for more information on setting up security authorizations. If a user has been authorized to directly add a container to inventory and an audit trail is not necessary, the **Add** button will be enabled. Click on this button and a blank entry screen will display for the new container. Enter in all pertinent data and click on **Save** to add the container to inventory, or **Revert** to discard the new container. Note: The ‘**Dups on Adds**’ feature is not available through this option.
Edit Container
Select the record to be edited by using the <First>, <Previous>, <Next> or <Last> buttons, or the <Search> button on the tool bar. *Note: For databases containing more than 50,000 containers, this can be a very slow search. Using the <TR Con> or the <Ref 1> Quick Search buttons are a better choice. The <Search> button may or may not be enabled depending on the security settings.* Once the record is displayed click on the <Edit> button. The editable fields will be enabled. Use the mouse to activate the cursor in fields to be modified. After all changes have been made, click on the <Save> button to save the changes and exit the edit mode or click on the <Revert> button to discard the changes and return the screen to the previous settings.

Editing a Location or Storage Code
If it becomes necessary to edit a location, a Total Recall container number or modify a storage code, this can be done with authorization granted in the ‘Administrative Power Feature’ of the security menu. It is highly suggested that if you grant this administrative power feature to an individual for the purpose of correcting a mistake, as soon as this correction has been made, this feature is disabled to prevent any future problems. There is not audit trail when changing any of this information, so it is discouraged.

Delete Container
It is Not advisable to delete a container from the maintenance screen, because it does not provide for an audit trail. In most every case, containers should be permanently removed through a work order, this will provide an audit trail and allow the record to be viewed in the permanent removal inquiry screen. If it becomes necessary to directly delete a container through the container maintenance option, the user must have authorization through the ‘Administrative Power Feature’ to ‘Directly Delete’ a container. *Note: Refer to Chapter 10 – Security – Add/Edit Individual Security Setups, for more information on setting up security authorizations.* If a user has been authorized to directly delete a container from inventory and no audit trail is necessary, the <Delete> button will be enabled, with the record to be deleted displayed on the screen, click on the <Delete> button and the system will prompt to be sure that the record is to be deleted. Click on <Yes> to delete the container or <No> to exit the prompt and keep the container in inventory.
Indexed Items in Container

While viewing a Container record, the user can quickly view the indexed items within the container by clicking on the ‘Indexed Items in Container’ Tab. A screen similar to the one in Fig. 5.33 will display when this ‘tab’ is selected and items have been indexed within the container.

Print  The <Print> button allows the user to print the container history. This report displays history of all indexed items within the specified container.

Edit Item in Container  The user may edit the indexed item information from this screen. Click the <Edit> button on the tool bar, the grid area will then be in edit mode. Click on the field you want to edit and modify the record, click on the <Save> button when finished to save the changes or <Revert> to discard the changes.
Indexed Items Stored In Containers

The indexed items stored in containers screen is displayed below. This option allows the user to view and edit an indexed item record. The lower right portion of the screen displays the container description from the inventory record. A sample of this screen is displayed Fig. 5.34.

**Location**
The ‘Location’ field displays the current location of the container where the indexed item is permanently stored.

**Item ID**
This field is a customizable field and may display differently dependent on the customer setup. This field is an additional index field for detailing the record in dynamic allocation. In fixed allocation, this field must contain a unique value within the container. This will track the item within the program.

**TR Container**
This field displays the Total Recall container number where the indexed item is permanently stored.

**TR Item ID**
This field displays the Total Recall item number that is assigned either manually or automatically when the item is indexed in Total Recall. This number tracks the indexed item throughout Total Recall.

**Last Location**
If a data is displayed in this field, the indexed item is currently at the record center but not in the permanent container. This field displays the location where the indexed item is currently stored.
Access Cnt  This field displays the number of times the indexed item has been retrieved since it was added to inventory.

Cust  The customer section is made up of two fields and a customer search button. The first field is the customer number field; the second field is the customer name as entered on the customer maintenance screen. The search button activates the ‘Locate Customer’ search screen. Click on this button to quickly locate a specific customer.

Dept  This field displays the department, if any associated with the indexed item.

Item Type  This field displays the ‘Type’ associated with the indexed item displayed. Types identify the type of item being stored typically the item type for an indexed item is ‘FILE’. Item types are required for the web server.

Store Cd  This field displays the storage code that may or may not be assigned to the indexed item. If monthly storage is charged for the indexed items, a storage code must be displayed here that is associated with a charge.

Retention Information  Depending on Parameter settings the Retention information may or may not be copied from the owner Container.

Effective  This date reflects the date the indexed item was added to inventory.

From  This date field displays the beginning date for the indexed item. This is an optional field.

To  This date field represents the last date for the indexed item.

Expires  This field is for the expiration or destruction date of the item.

Index Information  This section contains user-defined reference fields. Each indexed item can have up nine 9) index fields, a description and an item ID. These index fields allow a user to further identify an item. These field captions can be customized on a customer, item type or department basis to represent the data contained within that field. The quantity field is part of the fungible module. Chapter 3 details this module.

Scan On Demand  If the scan on demand module has been purchased the <Scan On Demand> button will be enabled. Scan on demand allows users to scan images and make them available via the Total Recall web server.
Audit Information

**Retrieved** This field indicates whether or not the indexed item is currently retrieved. A check in the box indicates the item is retrieved.

**Date** This field displays the date the indexed item was retrieved if the ‘Retrieved’ box is currently checked.

**Name** If the indexed item is currently retrieved, this field displays the name of the person the item is currently retrieved to, if this information was entered at the time of retrieval.

**Phone** If the Container is currently retrieved, this field displays the phone number of the person who retrieved the indexed item, if this information was entered at the time of the retrieval.

**Due Date** This field may display the date the indexed item is due back to the record center. This field will automatically populate when an item is retrieved if ‘Default Days’ were associated with the retrieval code used to retrieve the indexed item.

**Last WO** The ‘Last WO’ field displays the work order number where the indexed item last had activity.

**Update** This field reflects the user ID of the person logged into Total Recall when the last update was done to the indexed item record. If the item record has not been updated since it was created, it will reflect the user ID of the user logged in at the time the item was indexed.

**Update ID** This field reflects the last date that this indexed item record was updated. If it has not been updated since the creation date, it will reflect the same date as the ‘create date’.

Container Information

**Desc** This field displays the container description for the permanent container where the indexed item is housed.

**Retrieved** This field indicates whether or not the container where the item belongs is currently retrieved. A check in the box indicates the container is retrieved.

**Print** The `<Print>` button allows the user to preview on the screen or print to a printer the item history, which includes all activity for the indexed item.
Add Indexed Item

It is Not advisable to add an indexed item from the maintenance screen. All Items should be indexed through a work order, to provide an audit trail and ensure proper billing. If it becomes necessary to directly add an indexed item, the user must have authorization through the 'Administrative Power Feature' to 'Directly Add' items in containers. Note: Refer to Chapter 10 – Security – Add/Edit Individual Security Setups, for more information on setting up security authorizations. If a user has been authorized to directly add an indexed item to inventory and an audit trail is not necessary, the <Add> button will be enabled, click on this button and a blank entry screen will display for the new item. Enter in all pertinent data and click on <Save> to add the indexed item to inventory, or <Revert> to discard the new item. Note: The ‘Dups on Adds’ feature is not available through this option.

Edit Indexed Item

Select the indexed item record to be edited by using the <First>, <Previous>, <Next> or <Last> buttons, or the <Search> button on the tool bar. Note: For databases containing more than 50,000 indexed items, this can be a very slow search. Use the query builder option or enter this screen through the inquiry menu for better results. The <Search> button may or may not be enabled depending on the security settings. Once the record is displayed click on the <Edit> button. The editable fields will be enabled. Use the mouse to activate the cursor in fields to be modified. After all changes have been made, click on the <Save> button to save the changes and exit the edit mode or click on the <Revert> button to discard the changes and return the screen to the previous settings.

Delete Indexed Item

It is Not advisable to delete an indexed item from the maintenance screen, because it does not provide for an audit trail. In most every case, items should be permanently removed through a work order, this will provide an audit trail and allow the record to be viewed in the permanent removal inquiry screen. If it becomes necessary to directly delete an indexed item through the indexed items stored in containers maintenance screen, the user must have authorization through the ‘Administrative Power Feature’ to ‘Directly Delete’ an indexed item. Note: Refer to Chapter 10 – Security – Add/Edit Individual Security Setups, for more information on setting up security authorizations. If a user has been authorized to directly delete an indexed item from inventory and no audit trail is necessary, the <Delete> button will be enabled, with the record to be deleted displayed on the screen, click on the <Delete> button and the system will prompt to be sure that the record is to be deleted. Click on <Yes> to delete the indexed item or <No> to exit the prompt and keep the item in inventory.
System Item ID Maintenance

**Fixed Allocation** – The item ID field is a required field for fixed allocation; it is used for tracking the indexed item. The data entered in this field must be unique to the container, although the same item ID can be assigned to a different indexed item in a different container. When setting up Total Recall the Total Recall item number can be used as the item ID, when this option is selected, Total Recall will automatically populate the item ID field on the indexed item add screen when the line is saved. Note: Refer to Chapter 10 – System Menu – Work Order / Space Allocation – Work Order Parameters for setting up this feature. If this feature is not being used and a unique Item ID is to be entered, and the Item ID was entered incorrectly, this option allows the user to correct the item ID field. The item ID cannot be modified from the items stored in containers maintenance screen, it must be modified on this screen.

**Dynamic Allocation** – In dynamic allocation, Total Recall uses the Total Recall item number to track an indexed item, the ‘Item ID’ field is simply another indexed field and does not have to be unique within a container. This field is not a required field in dynamic allocation and can be modified from the indexed item maintenance screen.

The screen in Fig. 5.35 displays when the item ID maintenance option is selected from the maintenance menu.

![Item ID Maintenance Screen](image)

**Location** Enter the location of the container where the indexed item is stored. If the location is not known, click on the binoculars and the indexed item inventory screen will display. Use the quick search buttons to locate the indexed item to be modified. With the item highlighted, click on the <Select> button. This will return the user to the item ID maintenance screen and the information from the highlighted record will be displayed on this screen.
**Item ID**  If the record to be modified was located through the binoculars, this field will be filled in. If the location was entered by the user, the user will then need to enter the unique <Item ID> in this field. After entering data in the ‘Item ID’ field and click into the <New Item ID> field using the mouse or by pressing [ENTER] or [TAB] to the <New Item ID> field. When the indexed item has been identified, the information on the right half of the screen will be display information from the inventory record.

**New Item ID**  Enter the New ‘Item ID’ in this field. In the case of fixed allocation it must be a unique item ID to the container.

**Cust**  This field will automatically fill in the customer number associated with the selected item from the indexed item inventory record.

**TR File #**  This field will automatically fill in the Total Recall item number associated with the selected item from the indexed item inventory record.

**Item Description**  This field will automatically display the item description from the inventory record providing that there is an item description associated with the record in inventory.

**Retrieved**  The ‘Retrieved’ box will be checked if the indexed item selected is currently retrieved.
Category Codes

By using category codes, Total Recall is capable of supporting any service the record center provides. To ensure each service is processed properly, category codes are used. Category codes group similar service codes together to inform Total Recall how to handle a request from the work order. Total Recall uses thirteen categories. The screen on Fig. 5.36 displays when the category code option is selected and the <Edit> button has been clicked, it will allow the user to change the description of the category code only. Note: It is Not recommended to change the descriptions of the categories. The codes cannot be changed and will still be associated with the same work order line screens.

![Category Code Maintenance](image)

This option allows for the user to modify the description of the category code. Scroll through the category codes by using the <First>, <Previous>, <Next> or <Last> buttons. The <Search> button can also be used to locate a specific category code. Once the code has been located, click on the <Edit> button and modify the category code description. No other fields can be edited. The create date, update date, and update ID fields track the update Information of the category code.

There are thirteen (13) category codes, each identified by a unique number or letter. Note: Some category codes apply only to container activity; some only apply to indexed item activity, while others apply to both containers and indexed items. Below is a list of the thirteen category codes and a description of each.

1 Temporarily Retrieve Container Codes in this category are for services associated with the temporary retrieval of a container from the record center. This container is expected to return at a later date.

2 Permanently Remove Container This category code is associated with services for the permanent removal of a container out of the record center for either return to the customer or for destruction.

3 Add New Container This category includes services associated with a new container being added to the record center.
4 Item and Storage Type

This category contains service codes used to identify the storage type of both containers and indexed items within containers. The charges associated with this category code will be charged on a monthly basis.

5 Transportation

This service code is associated with the transportation codes for both containers and indexed items to and from the record center.

6 Relocation

This service code involves the moving of containers or indexed items from one location to another location within the record center. When a container is relocated, all indexed items within the container are also relocated to the new location.

8 Retention

This category code is associated with service codes that specify the retention period for a container or an indexed item. Note: Charges are NOT associated with service codes using this category code.

9 Miscellaneous

This category code is associated with all service codes that require no special processing. These may include services such as: photocopying, faxing, miscellaneous labor charges, and record destruction services.

B Temporarily Retrieve File/Item

This category is associated with service codes for temporarily retrieving an indexed item from the record center. This indexed item is expected to return to the record center at a later date.

C Permanently Remove File/Item

Service codes associated with this category allow for the permanent removal of indexed items from the record center. These items are either to be returned to the customer or destroyed.

D Add New File/Item

This category is associated with adding or indexing of items within containers.

E Return Retrieved Container

Service codes using this category are associated with the return of a temporarily retrieved container back to the record center.

F Return Retrieved File/Item

This category is associated with service codes for the return of a temporarily retrieved indexed item to the record center.
Customer Departments

Some customers may request to have their containers and indexed items within their containers tracked at a department level using department ID’s. A customer may have an unlimited number of department ID’s, these ID’s can be either alpha, numeric or a combination of alpha and numeric. All indexed items stored within a container must have the same department ID as the container. **Note:** If a customer is requesting department tracking, the ‘Department Required’ field should be selected on the customer maintenance screen, which will force a user to enter a department on a work order line before it can be saved. If the customer requests department billing, ‘Bill by Dept’ must be selected on the customer maintenance screen.

The screen Fig. 5.37 displays the department masters screen. From this screen the user can add, edit or delete a customer department. This screen can also be accessed through the customer maintenance screen - department tab.

![Department Maintenance Screen](image)

There are two tabs on this screen, ‘**General Information**’ and ‘**Captions**’. The following details the fields on the general information screen. The caption screen allows for the user to customize reference field captions on a department level.

**Customer #** This field is for the customer ID, if this is not known, click on the binoculars to the right of the field and the customer search screen will display for the user to use to locate the customer.
**Customer** Once the customer has been selected, the full customer name from the customer maintenance screen will appear in this field.

**Department** This field is for the department ID. The department ID can be alpha or numeric or a combination of alpha and numeric. This department ID will be associated with the containers and indexed items in inventory.

**Department Description** This field allows for the user to enter a description for the department previously entered.

**Department Address** These fields allow the user to enter an address specific to the department listed. These fields include a place to enter a contact name, phone number and an e-mail address.

**Audit Information**

**Create Date** This field displays the date when the department record was originally created.

**Update Date** This field displays the date the department record was last updated. If the record has not been updated since it was created, it will display the create date in this field.

**Update Time** This field displays the time the department record was last updated.

**Update ID** This field displays the user ID of the person logged into Total Recall when the department record was last updated.
Department Statistics

Total Recall records monthly transaction statistics for all customers. For those customers that bill by department, the statistics are also maintained on a department level. This menu option allows the user to view and possibly edit the department statistics. For a user to have access to edit the department statistics, the access must have been granted in the administrative power features in the security setup. A screen similar to the one below displays when this option is selected from the maintenance menu.

The fields on the left side of the screen display the individual customer service code and the pricing information. The right side of the screen displays the transaction history with a year-to-date total. This transaction history records the number of departmental transactions that were completed for this customer, referencing the code displayed on the left side of the screen. These totals are calculated at ‘month end close’ and displayed on this screen the month.

To adjust the statistics, once the access has been granted, click on the <Edit> button in the navigational tool bar and click in the field to be edited. Make adjustments as necessary, the year-to-date total will update as necessary. When the changes have been made, click on the <Save> button to save the changes or <Revert> to undo the changes and exit the edit mode. On this screen, the only fields that are editable are the monthly transaction history fields.

Cust  This field displays the customer number associated with the record displayed.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Dept</strong></td>
<td>This field displays the department ID for the record displayed.</td>
</tr>
<tr>
<td><strong>Service Code</strong></td>
<td>This field displays the department service code for the customer.</td>
</tr>
<tr>
<td><strong>Price</strong></td>
<td>Displays the current customer price charged for a specific service code listed.</td>
</tr>
<tr>
<td><strong>Default Days</strong></td>
<td>This field displays the number of days contained within the retention period for retention codes and the number of days before an item is to be returned to the record center when it is retrieved for the customer listed.</td>
</tr>
<tr>
<td><strong>Cat</strong></td>
<td>This field displays the category code associated with the current service code displayed.</td>
</tr>
<tr>
<td><strong>Desc</strong></td>
<td>This field displays the service code description associated with the service code displayed for the customer listed.</td>
</tr>
<tr>
<td><strong>Cost</strong></td>
<td>Displays the current master service code cost if a cost was associated with the service code listed.</td>
</tr>
<tr>
<td><strong>Default Days</strong></td>
<td>This field displays the number of days contained within the retention period for retention codes and the number of days before an item is to be returned to the record center when it is retrieved for the master service code listed.</td>
</tr>
<tr>
<td><strong>Tax</strong></td>
<td>This field displays the tax rate associated with the master service code, if tax is to be charged for the service code listed.</td>
</tr>
<tr>
<td><strong>Transaction History</strong></td>
<td>When the month end processing is completed each month, statistics are generated to reflect how many transactions of each service code were performed in that month. Statistics are then broken down by customer and by department. These department statistics are then displayed in the department transaction history for each month.</td>
</tr>
</tbody>
</table>
Facility Layout

Depending on whether the system is setup in fixed or dynamic allocation, this screen serves different purposes.

**Fixed Allocation** – The facility layout is used to build locations within the record center. These locations can be assigned to a specific storage code or can be allocated as mixed storage. The locations can be assigned to a specific customer and can be built for immediate or future use.

**Dynamic Allocation** – The facility layout is used to assign areas of the record center to a specific monthly storage code and the total number of containers than can be shelved in each location. This screen is also used to assign locations to a customer that bill by the facility layout.

The screen on Fig. 5.39 displays when the facility layouts option is selected from the maintenance menu.

**Beginning Location**

Enter the first or beginning location to be established. Enter locations without the dashes. The dashes will fall in place as the location is entered.

**Ending Location**

Enter the ending or last location to be established. Again, enter the location without dashes. The dashes will fall in place as the location is entered.
Description  The description field is an optional field. The description field allows the user to enter a brief description of the locations being built.

Mixed Storage Area  If the locations that are currently being specified are for various size boxes, check this field. With this field checked, no service code is required for the locations.

Service Code  Fixed Allocation – Enter into this field the monthly storage code for the specified locations. A list of valid monthly storage codes is available from the drop down menu to the right of this field. A storage code must be entered in this field if the ‘Mixed Storage Area’ field is Not checked.

Dynamic Allocation – Enter into this field the monthly storage code to be allocated to the specified locations. If the locations are not size specific, check the box to the left of ‘Mixed Storage Area’.

Eligible for Use?  Specify in this field either a ‘Y’ or ‘N’ to indicate whether or not these locations can be used immediately or saved for future use.

# Of Locations  When the locations are created, Total Recall will calculate the number of units created within the range established and display the number in this field.

# Containers /Loc  Enter the number of containers that each specified location will hold.

Customer  If the location range setup is to be designated to a specified customer, enter the customer number in this field. The binoculars to the right of the field can be clicked to access the customer search screen.

Department Id  If the location range setup is to be designated to a specified customer and a department, enter the customer’s department from the listing. The drop down will display all departments for the designated customer.

Expire Date  This field is for the user to enter a valid expiration date if the location range indicated is being billed to the customer indicated and the customer has only reserved the space until a specified date.
Add New
Locations

Fixed Allocation – Click the <Add> button on the navigational tool Bar. This will display a blank screen. The cursor will be active in the ‘Beginning Location’ field. Enter the first or beginning location, entering the numbers and or letters designating the location only, the dashes will fall into place. Press [ENTER] or [TAB] to advance the cursor to the ‘Ending Location’ field. Enter the last of ending location. Continue entering the requested information. After all layout information is entered, click the <Save> button to save the new locations to the available location file. The screen will display the status as the new locations are built. When the process is complete, the navigational tool bar will be reactivated.

Dynamic Allocation – Click the <Add> button on the navigational tool bar. This will display a blank screen. The cursor will be active in the ‘Beginning Location’ field. Enter the first or beginning location, entering the numbers and or letters designating the location only, the dashes will fall into place. Press [ENTER] or [TAB] to advance the cursor to the ‘Ending Location’ field. Enter the last of ending location. Continue entering the requested information. After all layout information is entered, click the <Save> button to save the new locations to the location table.

Edit Available Locations

Use the <First>, <Previous>, <Next> or <Last> buttons or the <Search> button to select the record to be edited. Click on the <Edit> button. Modify the record as needed. After all changes have been made, click on the <Save> button to keep the changes and exit the Edit mode. To discard all changes and restore the original information, click on the <Revert> button.

Delete an Available Location

By using the <First>, <Previous>, <Next> or <Last> buttons or the <Search> button, select the facility layout record to be deleted, click on the <Delete> button. Total Recall will display a message to verify the displayed record is to be deleted. Click <Yes> to remove the facility layout record, click the <No> button to cancel the deletion.
Record Series

The record series reflects the general ‘categories’ of records that will be stored. For example: accounts payable, accounts receivable, payroll or taxes. Each record series has a unique identification number associated with it and can have an associated retention code and an item type.

A record series can be entered generally for all customers, or can be entered to be customer and/or department specific. There are two tabs on the record series screen: the ‘Record Series Parameters’ tab which is displayed below, and the ‘Comments’ tab.

Displayed in Fig 5.40 is the record series initial screen.

**Record Series Parameters Tab**

**Customer** If the record series displayed is specific to a customer, indicate that customer in this field. Click on the binoculars to the right of the field to activate the customer search screen.

**Customer Department** If the record series displayed is associated with a customer and that customer is departmentalized, the record series can be department specific. Click on the drop down menu to the right of the field to see a listing of departments within the specified customer.
**Record Series**
Enter a unique record series code in this field. This code can be alpha or numeric or a combination of both alpha and numeric. The field length of this field is set by the user in the System Parameters – Bar Code/Field Lengths ‘Tab’.

**Item Type**
This field is to enter the item type specific to the record series. The item type can be associated with specific custom reference field captions.

**Description**
This is a thirty-character field to enter a brief description of the category of records to be associated with this record series.

**Primary Retention Code**
If this record series is to be associated with a retention code, that code is to be entered in this field. To view a listing of available retention codes click on the down arrow key to the right of this field, select the code and double click. The value of this retention code will be automatically filled in by Total Recall when the associated record series is selected.

**Audit Information**
This area indicates the create date, the update date and the update ID associated with the creation and update of the displayed record.

**Comments**
A free text screen, which allows the user to enter specific information regarding the record series. If the record series is for tax records and the federal law requires that these records be retained a certain number of years, this information can be recorded in the ‘Comments’ section of this screen. When information is entered in this ‘Comments’ field, it can be viewed on the container and indexed item maintenance screens by clicking on the <? > button next to the ‘Retention Information’ fields.

**Add A Record Series**
Click the <Add> button on the navigational tool bar to add a new record series. If the record series is to be specific to a customer, enter the customer. Enter the department if the record series is to be department specific. To search for a customer, click on the binoculars to the right of the field to display the customer search screen. Continue entering information in the fields using the [ENTER] or [TAB] keys to advance the cursor to the next field. After all information is entered, click the <Save> button to add the new record series. To discard all of the information entered, click on the <Revert> button prior to saving the record and exit the input mode.
**Edit A Record Series**

Click on the <First>, <Previous>, <Next> or <Last> buttons or the <Search> button to select a record to Edit. With the selected record displayed on the screen, click on the <Edit> button. This will allow the fields to be modified as needed. After all changes have been made, click on the <Save> button to store the changes. To discard all changes, click on the <Revert> button and restore the original record.

**Delete A Record Series**

Click on the <First>, <Previous>, <Next> or <Last> buttons or the <Search> button to select a record to be deleted. With the record to be deleted displayed on the screen, click on the <Delete> button. Total Recall™ will display a prompt: Do you want to Delete this record? Click on the <Yes> button to remove the currently selected record series, click the <No> button to cancel the deletion.
Customer Labels

The print labels option is for dynamic allocation only. Fixed allocation labels are printed from the Reports Menu – Operations Menu. These are printed in location order. They can also be printed from the work order.

There are three options available under the customer labels tab: **Container Labels, Indexed Items Labels** and **Print Range of Pre-Assigned Labels**. The container and indexed item labels screens allows the user to preprint bar code labels for customers so they may affix them to their containers and/or indexed items before they send them to the record center. This menu option will allow the user to reserve a block of container numbers and/or indexed item numbers for a specific customer and, if desired, a specific department within that customer. *Note: Refer to Chapter 9 - Utility Menu for help in designing label formats.* Fig 5.41 displays when the customer labels - container labels option is selected. This screen is identical to the customer labels - indexed items labels option except for the reference to ‘item’ instead of container. As labels are added to this screen, a table is being built that stores these label range records, regardless of when the containers are scanned to inventory, if they were assigned a customer and/or department on this screen, this information is used to determine the owner of the container. It is recommended that ALL users be blocked from editing or deleting records from this screen, this can by done on the security menu, administrative power features.
The Print Range of Pre-Assigned Labels option allows the user to print a listing of all pre-assigned labels that have been printed previously. This option allows the user to select to print a listing of container or indexed item labels. Label reports can be printed by customer or by create date.

If labels are preprinted and affixed prior to the containers arriving at the record center, these containers can be scanned immediately upon arrival at the center. The table below details the fields on the customer labels screen(s).

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Starting Container (File) Number</td>
<td>This field displays the first or starting number for the current record.</td>
</tr>
<tr>
<td>Ending Container (File) Number</td>
<td>This field will display the last or ending container or file number for the current record. This field is automatically filled in when the used identifies the number of labels to be printed or assigned.</td>
</tr>
<tr>
<td>Customer #</td>
<td>This field displays the customer number for which these labels are assigned. The binoculars to the right of the field allow the user to access the customer search screen.</td>
</tr>
<tr>
<td>Printed</td>
<td>After labels have been printed, this box will be checked. If the labels are blocked for later use and not yet printed, this checkbox will remain unchecked.</td>
</tr>
<tr>
<td>Department</td>
<td>Enter the department ID for the customer if you choose to have the department identified when the container is scanned.</td>
</tr>
<tr>
<td>Number of Labels to Print</td>
<td>This field allows the user to identify how many copies of each label to print.</td>
</tr>
<tr>
<td>Number of Labels to Skip</td>
<td>Indicate in this field the number of labels, if any, that are missing at the top of the first sheet of labels. For example, if you have a sheet of labels to use and the first four labels were already used, indicate here to skip four labels and Total Recall will begin printing the selection from the fifth label position, all other pages after the first page will print full pages of labels beginning in the first position.</td>
</tr>
<tr>
<td>Audit Information</td>
<td>These fields indicate the date this label record was created, the last date it was updated and the user ID of the individual logged into the system when the last update was completed.</td>
</tr>
</tbody>
</table>
**Add Label Range**

Click on the `<Add>` button to enter data for a new set of labels. A message may display alerting the user that the parameter table is being locked until the entry is saved. The user should attempt to get in and out of this screen quickly. If the alternative pre-print label locking methodology is being used, this message will not display.

Total Recall will prompt the user for the number of labels to be assigned. When the user enters the number of labels the ‘Starting Container (File) Number’ field will display the next available Total Recall container (indexed item) number. You may choose to use a different TR container (file) number as the starting number. If this is the case, simply enter that number into this field, being very careful of the number entered. Total Recall will automatically assign the ending container (file) number, unless the starting number was altered. If these labels are to be assigned to a specific department within the selected customer, indicate that department ID in the ‘Department’ field. When the information has all been entered, click on the `<Save>` button to save this record or `<Revert>` to discard this set of labels. If the customer box number tracking option is in use, the starting and ending customer box number fields display for the user to enter a starting number if it is not automatically being assigned. The user will also have the option to enter a box number prefix and/or a box number suffix to be associated with the customer box number. When the Total Recall container number is scanned into inventory this customer box number field automatically populates the container reference 1 field.

*Note: If you enter a number that overlaps a previously entered group of numbers the system will alert you when you attempt to save the record by displaying a prompt: “Label overlaps entry xxxx-xxxx”. Click on `<OK>` and you will be taken back to the label entry screen.*

**Edit Label Range**

The edit feature may or may not be enabled. It is recommended that users do not have access to editing the pre-print label table. If the edit button is enabled use the `<First>`, `<Previous>`, `<Next>` or `<Last>` buttons or the `<Search>` button to select a record to be edited. Click on the `<Edit>` button to modify a previously entered label record. All fields are editable, but if you enter starting and/or ending numbers that overlap with other numbers, the previous warning will display and the entry will not be accepted.
**Delete Label Range**
The delete feature may or may not be enabled. It is recommended that users do not have access to delete records from the pre-print label table. If the delete button is enabled use the `<First>`, `<Previous>`, `<Next>` or `<Last>` buttons or the `<Search>` button to select a record to be deleted. Click on the `<Delete>` button to delete the label record displayed. The system will prompt the user: ‘Do you want to delete this record?’ Click on `<Yes>` to proceed with the record deletion or click on `<No>` to retain the record in the current system.

**Print**
Using the `<First>`, `<Previous>`, `<Next>` or `<Last>` buttons or the `<Search>` button, select a Label record to be printed. With the set of Labels to be printed selected and displayed on the screen, click on the `<Print>` button. The Print Labels screen shown in Fig 5.42 will display.

![Print Labels Screen](image)

The user now has the option to preview the labels on the screen or print the labels to a printer. Click either `<Preview>` or `<Printer>`, select the version if necessary and then click on the `<Print>` button. The labels will then either display on the screen or, if you selected to send them to a printer, a secondary screen will display allowing the user to select a printer. If the labels were first previewed on the screen, they can be sent to the default printer from the preview screen by clicking the printer icon.
**Item Types**

The item types menu option allows the user to customize reference fields by the ‘type’ of records stored. If the Total Recall Web server module is being used, item types MUST be set up for all records that are to display on the web server. Often times the item types setup are: ‘BOX’ and ‘FILE’. A user may set up item types with customized captions and then incorporate these ‘types’ with a record series. The item type maintenance screen has two ‘tabs’: the **General Information** ‘tab’ and the **Captions** ‘tab’. The general ‘tab’ screen is displayed on Fig 5.43 followed by a description of the fields.

**Fig 5.43**

**Item Type**  Enter the item type into the ‘**Item Type**’ field.

**Customer**  This field allows for a user to enter a customer number if the item type is customer specific. To access the customer search screen, click on the binoculars button.

**Department**  If a customer has been entered previously and the customer is departmentalized, and the item types or captions are to be department specific, enter the department into this field. A listing of valid departments is listed in the drop down field to the right of the ‘**Department**’ field.

**Storage Type**  Radio buttons for Container, Index Item, Both or Neither.
Audit Information  
These fields indicate the date the item type record was created and the date and time of the last update, along with the user ID of the person updating the record last.

Add an Item Type  
Click on the <Add> button to enter a new item type. A blank entry screen will display allowing for entry. Enter all pertinent information and click the <Save> button to add the item type, or click the <Revert> button to discard the new record and return to the item type screen.

Edit an Item Type  
Using the <First>, <Previous>, <Next> or <Last> buttons or the <Search> button to select a record to be edited. Click on the <Edit> button to modify a previously entered item type. All fields are editable. Make necessary changes and click on the <Save> button to save the changes or click on the <Revert> button to discard the changes and return to the item type screen.

Delete an Item Type  
Using the <First>, <Previous>, <Next> or <Last> buttons or the <Search> button to select a record to be deleted. Click on the <Delete> button to delete the item type displayed. The system will prompt the user: ‘Do you want to delete this record?’ click on <Yes> to proceed with the record Deletion or click on <No> to retain the record in the current table.
Route Maintenance

Fig. 5.44 displays when the route maintenance option is selected from the maintenance menu. Its purpose is to provide the user with a means of establishing routes with associated for the dispatching of work orders by pre-defined routes. The route maintenance screen is displayed below followed by a table detailing the fields on this screen.

**Route Maintenance Screen**

![Route Maintenance Screen](image)

**Route ID**
Enter the route identifier into this field. This is a required field and will display on work orders that have been assigned this route.

**Vehicle Cubic Capacity**
This field is an optional field to enter the capacity of the vehicle in cubic feet.

**Vehicle Description**
This field is an optional field to enter a description of the vehicle used to run this route.

**Route Description**
This is an optional field that briefly describes this route. It can be vague or detailed, depending on the requirements of the user.

**Audit Information**
These fields indicate the date the record was created and the date and time of the last update, along with the user ID of the person last updating the record.

**Add Route**
Click on the `<Add>` button to enter a new route. A blank entry screen will display allowing for entry. Enter the pertinent information and click the `<Save>` button to add the route as an available route to all customers.
**Edit Route**

Using the <First>, <Previous>, <Next> or <Last> buttons or the <Search> button, select the record to be edited. Click on the <Edit> button to modify the displayed route. All fields are editable. Make necessary changes and click on the <Save> button to save the changes or click on the <Revert> button to discard the changes and return to the route maintenance screen.

**Delete Route**

Click on the <First>, <Previous>, <Next> or <Last> buttons or the <Search> button to select a record to be deleted. With the record to be deleted displayed on the screen, click on the <Delete> button to delete the route displayed. The system will prompt the user: ‘Do you want to delete this record?’ click on <Yes> to proceed with the record deletion or click on <No> to retain the record in the current system.
Work Order Description Maintenance

The work order description maintenance screen allows the user to create, edit and delete work order descriptions. Work orders are key to Total Recall, they track activity and create the charges for the invoicing. The work order description allows the user to assign a standard description of the work order activity that will then automatically assign the priority code, the transportation code (if the transportation code was assigned to the priority) delivery date and a delivery time. This field can and should be a required field on the work order screen. Note: To set the field as required see Chapter 10 – System Parameters – Work Order/Space Allocation screen. A sample of the work order description screen is displayed on Fig 5.45.

**Default Work Order Descriptions**

![Default Work Order Descriptions](image)

**Work Order Description Screen**

This field allows the user to enter a brief description of the work order activity.

**Associated Priority Code**

This field allows the user to associate a pre-defined priority to the work order description. Note: See the next section of this manual for information on adding priority codes.

**# Of Days added to Delivery date**

Enter the number of days to be added to the current system date for the due date to automatically adjust and display the date the order is to be delivered in the due date field.

**# Of Hours added to Delivery date**

For time sensitive work orders, enter the number of hours to be added to the current system time for the due time to automatically calculate and display in the due time field. This field is normally only used for rush or after hour orders so the warehouse personnel and the driver know when the work order is due to be at the customer’s location.
**Designated Specific Delivery Time**
For standard deliveries, a time can be entered to display in the due time field to designate the time by which the delivery is to be made.  
*Note: Time must be entered using 24-hour format.*

**Add Extra Day if WO is Created After:**
For standard deliveries, an extra day can be added to the due date if the order is created after the time specified in this field.  *Note: Time must be entered using 24-hour format.*

**Skip Saturday/Sunday Delivery**
For additional days added to the current days date to create a due date, if Saturday and/or Sunday are not to be used when calculating the work order due date, check one or both of these boxes.

**Mark for Auto Close**
Users with the Total Recall Dispatch module, will need to indicate if the work orders include in the dispatch module listing are to be automatically closed.

**Exclude from Dispatch**
Users with the Total Recall Dispatch module, will need to determine if the work order is to be dispatched dependent on the work order description. Work orders that are excluded will not display in the dispatch module with the list of work orders to be dispatched.

**Audit Information**
These fields indicate the date the record was created and the date and time of the last update, along with the user ID of the person last updating the record.

**Add**
Click on the `<Add>` button to enter a new work order description. A blank entry screen will display allowing for entry. Enter the pertinent information and click the `<Save>` button to add the work order description as an available description for all work orders.

**Edit**
Using the `<First>`, `<Previous>`, `<Next>` or `<Last>` buttons or the `<Search>` button, select the work order description record to be edited. Click on the `<Edit>` button to modify the displayed work order description. All fields are editable. Make necessary changes and click on the `<Save>` button to save the changes or click on the `<Revert>` button to discard the changes and return to the work order description maintenance screen.

**Delete**
Click on the `<First>`, `<Previous>`, `<Next>` or `<Last>` buttons or the `<Search>` button to select a work order description record to be deleted. With the record to be deleted displayed on the screen, click on the `<Delete>` button to delete the work order description displayed. The system will prompt the user: ‘Do you want to delete this record?’ click on `<Yes>` to proceed with the record deletion or click on `<No>` to retain the record in the current system.
Priority Delivery Code Setup

The priority delivery code setup screen allows the user to create and define priority delivery codes. Fig. 5.46 displays the priority code screen.

![Priority Delivery Code Setup](image)

**Priority Code**
A single character code, either alpha or numeric in nature, which will identify the priority on the work order.

**Trans Code**
Select the header transportation code that is to be assigned to all work orders with the stated priority. The header transportation code is the charge assessed to make the base delivery.

**Number of Trans Lines Included in Base**
This field allows the user to set the number of work order lines to be included in the base delivery charge if transportation requirement codes 4, 5 or 6 are being used. After this number has been met there is normally an additional charge assessed to all items delivered beyond this number. Total Recall’s maximum number is 9,999.

**Use Customer Defaults**
This is a checkbox for the user to select whether or not to pull the ‘# of Transportation Lines to be included in the Base’ from the Customer Maintenance –Defaults ‘tab’ screen instead of this screen. If the number is base is different depending on the customer, this box should be checked and the number of items to be included in the base delivery will need to be entered on the defaults ‘tab’ of the customer maintenance screen.

**Priority Code Description**
This field allows for a brief description of the priority code. This description is limited to thirty characters.
CHAPTER SIX
Inquiry Menu
CHAPTER 6

Inquiry Menu

Overview

Use the inquiry menu to quickly search, view and filter the records in the database tables. Through the inquiry menu, the user can access many query builders.

Select the inquiry menu option using the mouse or by pressing the [ALT] and the [I] keys simultaneously. Move through the menu using the arrow keys on the keyboard, or select any menu option with the mouse.

The records in your database are displayed as a list in the grid area of the browse screen with the highlighted record detailed in the gray area immediately below the grid area. The records can be scrolled by using the scroll bar to the right of the grid area, the arrows on the keyboard, or the [PAGE UP] and [PAGE DOWN] keys on the keyboard. Additional columns can be viewed by using the arrow keys and scroll bar at the bottom of the grid area or by using the [TAB] key.

All the display screens in the inquiry menu have a set of quick search buttons in addition to the navigational tool bar. By clicking on a quick search button, the user can quickly sort the records. When a quick search button has been invoked, a ‘Locate Items’ screen displays, the user has the option of entering a value specific to the record being sought or simply clicking on the <Search> button to re-order the records in the database by the quick search button selected. If a value is entered, Total Recall will highlight the record matching or most closely matching the criteria entered.

Column headers on the inquiry screens typically are blue or black. All blue column headers allow the user to quickly sort the data by the column headers selected by simply using the mouse to click on the blue column header. Black column headers do not offer quick sort capabilities.

The Inquiry menu is shown on Fig. 6.1. A brief description of each option follows. Each browse screen is detailed after the brief description.
Inquiry Menu

Customers The customer’s inquiry option has two submenus: View List of Customers and Query Builder. The View List of Customers option allows the user to view an all-inclusive list of customers located in the master customer database. Double-clicking on any line on this list will bring up the ‘Customer Maintenance Input Screen’ detailed in chapter 5. The query builder menu allows the user to define a multitude of parameters for searching the database.

Containers The containers inquiry option has five submenus: View List of Containers, Query Builder, Container History, Rapid Data Maintenance, and Query by Example (QBE).

The View List of Containers allows a user to view the container inventory database. The Query Builder allows a user to build and run queries based on the container database. The query results can then be exported to a file. Results can be printed or globally replaced. The Container History option allows for a user to access history of the container by entering either a Total Recall container number or a customer and a reference 1 value to identify the container. This history can be viewed on the screen or sent to a printer. The Rapid Data Maintenance screen allows the user to quickly enter data into container database records. The Query by Example screen allows a user to quickly search and locate a record or a group of records.
Items in Containers

The items in containers inquiry option have five submenus: View List of Indexed Items, Query Builder, History of Indexed Items, Rapid Data Maintenance, and Query by Example (QBE). The View List of Indexed Items allows a user to view the indexed items inventory database. The Query Builder allows a user to build and run queries based on the indexed items database. The query results can then be exported to a file. Results can be printed or globally replaced. The History of Indexed Items allows the user to either view or print a report showing a chronological history of an indexed item’s transactions. The Rapid Data Maintenance screen allows the user to quickly enter data into indexed item records. The Query by Example screen allows a user to quickly search and locate an indexed item record or a group of records.

View Containers and Indexed Items Simultaneously

The ‘View Containers and Indexed Items Simultaneously’ offers a user to view and search both the containers and indexed items database at the same time. This menu option has two submenus: Query by Example (QBE) and View Items and History. The Query by Example (QBE) screen allows a user to quickly search and locate records throughout both databases and display the search results on the screen. The View Items and History screen accesses the search master, which will allow the user to view records in both databases matching the search criteria along with the history of those records.

Permanent Removals - Containers

The ‘Permanent Removals – Containers’ menu contains three submenus: View List of Containers, Query Builder, and Container History. The View List of Containers lists the permanently removed containers, whereas the Query Builder provides the user with a method of performing an extensive search of the database using the parameters the user enters. The Container History submenu follows the history of permanently removed containers and offers the user the option of either previewing or printing the history.

Permanent Removals - Items in Containers

The ‘Permanent Removals – Items in Containers’ menu contains three submenus: View List of Items, Query Builder, and History of Indexed Items. The View List of Items lists the permanently removed indexed items. The Query Builder provides the user with a method of performing a search of the database using the parameters the user enters. The History of Indexed Items allows the user to view the history of permanently removed indexed items.

Departments by Customer

This option allows the user to browse a listing of all departments currently listed within each customer in Total Recall.
<table>
<thead>
<tr>
<th><strong>Relocations by New Locations</strong></th>
<th>This option allows a user to view records that have been relocated. The quick search button on this screen allows the user to search by either Total Recall container number or by the new location.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Facility Layout</strong></td>
<td>This option allows the records of the facility layout file to be browsed. The location records added using the facility layout maintenance screen could be searched according to location number.</td>
</tr>
</tbody>
</table>
| **Available Locations** | **Fixed Allocation** – This option contains two submenus: View List and Query Builder. The View List option allows the user to view the records in the available locations table. The Query Builder option allows the user to initiate query searches on the available locations table.  
**Dynamic Allocation** – This option offers the same features as the facility layout inquiry option. |
| **Work Orders** | The ‘Work Order Inquiry’ menu allows the user to Browse List of Records or activates the Query Builder function. All active work orders, which include both open and closed work orders for the current period can be viewed and accessed through the Browse List of Records option. This screen allows the user to re-order records and find a record by work order number or the customer number. A Query Builder feature is also available from this menu allowing the user to query the active work order lines. |
| **Work Order History** | The ‘Work Order History’ inquiry screen has two submenus: Summary and Detail. The user has the ability from the Summary option to view the work order header information of all work orders from previous billing periods. The details option allows the user to search the individual line item detail for work orders from previous billing periods. |
| **Record Series** | Provides the user with two submenus. The first is the View List of Record Series, which provides a standard listing, and the second is the Query Builder, allowing the user to search the record series database table. |
| **History of Barcode Scan Errors** | Provides the user with three submenus: View List of Errors, Query Builder, and View/Recover Barcode Backup Files. The View List of Errors allows the user to search and view the error reports from previous barcode uploads. The Query Builder screen allows for the user to search the bar code scan errors. The View/Recover Barcode Backup Files allows the user to quickly locate and recover previously imported barcode files. |
Customers

The Customers Inquiry Menu has two submenus: **View List of Customers** and **Query Builder**. The **View List of Customers** screen is detailed on Fig 6.2. The **Query Builder** allows the user to build a query and export the results. *Note: Refer to Chapter 1 - Query Builder for information on the query builder.*

**View List of Customers**

The View List of Customers screen is pictured on Fig. 6.2 and allows the user to view the current customer listing.

**Customers Inquiry Screen**

The grid area on the customer screen displays a listing of all customer records in the customer database. These records can be scrolled up, down, left or right, using the arrows and bar to the right and below the grid. Additionally, the user can use the arrow keys on the keyboard or the [PAGE UP] and [PAGE DOWN] keys on the keyboard to scroll through lengthy lists contained in any of the Total Recall screens displaying lists.

To access the customer maintenance screen from the inquiry menu, double click on the customer record on the inquiry screen. The customer maintenance screen will be opened.
Clicking on the <Find> button on the navigational tool bar will take the user to the ‘Locate Customer’ screen. The user can search for an existing customer from a list sorted by either customer name or customer number.

From this screen, select whether the search is to be completed by the customer name or the customer ID, the default is customer name. Use the mouse to Click in the ‘Customer’ field, and begin entering the data to be matched, as information is entered an arrow ▶ will display to the right of the record that most closely matches what has been entered. As data is entered, this arrow will move downward through the list. When the arrow ▶ is to the left of the selection, press the [ENTER] key twice or click on the <Select> button.

Clicking on the <Search> button on the Navigational Tool Bar allows the user to perform a search that will filter the records and only display records that match the criteria entered in the ‘Boolean Search’ screen. A sample of the Customer Search screen is displayed in Fig 6.4.
The drop-down menus provide a convenient reference for setting the search parameters. The user only needs to know fragments of information pertaining to any customer for a search to be performed. *Note: See Chapter 1 – Search for more information on the Boolean search feature.*

Click the `<Print>` button to access the print listing of customers by name screen. When this button is clicked the print report screen will display allowing the user to enter the print report parameters.
Containers

The Container Inquiry Menu has five submenus: View List of Containers, Query Builder, Container History, Rapid Data Maintenance Screen and the Query by Example (QBE).

**View List of Containers**

The View List of Containers screen is pictured on Fig. 6.5 and allows the user to view the current container inventory. The containers may be searched either by clicking on a Quick Search button in the lower left portion of the screen or clicking on the <Search> button and using the Boolean Search feature to enter criteria and filter the database records.

*Note: Depending on the security settings, the <Search> button may or may not be enabled. See the Security Menu – Individual Security Settings for more information on enabling or disabling this feature.*

*Note: The Boolean Search feature is not recommended for databases with more than 50,000 records, this Search can be slow. The Query Builder is a more powerful and a better alternative Search.*

The grid area on the container inventory screen displays a listing of all container records in the database. These records can be scrolled up and down using the scroll bar to the right of the grid, the arrow keys on the keyboard or the [PAGE UP] and [PAGE DOWN] keys on the keyboard will also allow scrolling of the records.
The columns can be scrolled to the right and then back to the left by using the arrows and bar across the bottom of the grid, the left and right arrows on the keyboard or the <TAB> key to move to the right or <SHIFT> and <TAB> keys simultaneously to move to the left one field at a time. The columns of the grid can be rearranged by using the mouse to place the cursor on the column header, the cursor changes to a down arrow, drag the mouse the direction where the column is to be moved, when the placement for the column is reached, release the mouse. The columns can also be re-sized by placing the mouse on the line between the columns in the header and when the crossbars display move the column in the direction to re-size the column to meet your needs. The column changes will be saved per the user Log-On.

Highlighting a record in the grid and double clicking that record or clicking on the <Edit> button on the Navigational Tool Bar will take the user to the ‘Container Maintenance’ screen. From this screen the user can view and edit the information contained on the screen and also view any items indexed within the container. The Container Maintenance screen is displayed on Fig 6.6.

Click on the <Edit> button to update or add to the information displayed on the screen. To save any changes made to the screen click on the <Save> button. To return to the container inquiry screen click on the <Exit> button. Fields on this screen are detailed in Chapter 5 – Container Maintenance screen.
The detail band will display the entire record highlighted in the grid area. As the highlighted record changes, so does the information in the detail band. The memo field displays any information that was entered in the description ‘Memo’ field. To view this information, click on the <Display> button.

The last line of the detail band gives the current status of the container. If the container is currently retrieved, the retrieved box will be checked and the ‘Date Out’, will display. The ‘Out By’, ‘Due In’ and ‘Out Phone’ will be populated provided that the information for these fields was entered at the time of the retrieval.

The <Quick Search> buttons allow the user to quickly locate a record based on the Total Recall container number, the location, the description, the reference fields or the department. Note: Many of these fields are customizable and if they have been customized on the System Parameters screen, they will display as the abbreviated custom caption instead of the standard caption. Clicking on one of these buttons initializes a locate item screen similar to the one displayed on Fig 6.7.

The ‘Locate Items’ screen requires a customer ID except for the TR container number and the location quick searches. When the inquiry screen is initiated, the records are in Location Order for Fixed Storage and in TR Container Number Order for Dynamic Allocation. To locate a specific record, click on the corresponding quick search button and enter data as search criteria for the system to reference. The record(s) that most closely matches the search criteria entered will be highlighted on the screen. If an exact match is not found, the record that most closely matches the data entered will be highlighted. From this record the user can scroll the records in the database ordered by the information entered during the quick search.
Query Builder

The Query Builder allows the user to build, run and save queries. Query results can be exported, printed, globally replaced or matched against an import file. Note: See Chapter 1 – Query Builder for more information on queries.

Container History

The Container History screen allows the user to view and/or print historical container reports. Two search options are available under this feature to identify the container: The Total Recall container number and the reference one index field.

If the Total Recall container number search is used to identify the container, the user will be taken directly to the print report screen, the user can enter the Total Recall container number and either preview the report or send the report to a printer.

If the reference one search is used to identify the container, a ‘Locate Items’ screen will display allowing the user to enter the customer number and the unique reference one field. If a match is located the print report screen will display with the associated Total Recall container number the user can then elect to preview the history report or send the report to a printer. If a match is not found, the system message will display: ‘Item not found in Inventory’.

Rapid Data Maintenance

The Rapid Data Maintenance screen allows the user to quickly enter or modify data in the container maintenance record. This screen provides a convenient listing of all records for the specified customer presented in a spreadsheet format. Enter the customer number into the ‘Customer’ field or click on the binoculars to access the ‘Locate Customer’ screen. A sample of the container maintenance screen after a customer has been selected is displayed on Fig. 6.8
From this screen the user can add, edit or delete data from any number of fields. The columns can be moved to bring all columns where data will be entered closer. Data can be sorted by any of the column headers that display in blue by simply clicking on the column header. By double-clicking on a selected line, the user will be taken to the container maintenance screen and can edit the record from this screen if desired.

When editing is completed click on the <Save> button to save all the changes, or click on <Exit> to discard any changes made. Once the <Save> or <Exit> button is clicked, Total Recall will prompt the user: ‘Do you wish to exit this screen?’, click <Yes> to return to the main menu, click <No> to access inventory for another customer.

The Query by Example screen allows a quick search feature for locating containers in the current container inventory. A sample of the Query by Example screen is displayed on Fig. 6.9.
The user can enter one field of data or several fields of data to locate a record or records. If the search is to be customer specific, enter the Customer number in the ‘Client Id’ field or use the binoculars to access the ‘Locate Customer’ screen to identify the customer.

After criteria for the search has been entered, click on the <Search> button. Total Recall will search the container inventory for matches to the data entered, these matches will display directly below the search screen.

To clear the screen and begin a new search, click on the <Clear> button.

To export the results of the query, click on the <Export> button, the screen to the right will display. Select the export type and enter a file name and/or a data path. Click on the <Export> button to export the file. If a path was not identified the file will be located in the Recall directory.

**Items In Containers**

The Indexed Items Inquiry Menu has five submenus: View List of Indexed Items, Query Builder, History of Indexed Items, Rapid Data Maintenance Screen and the Query by Example (QBE). The functionality and appearance of these submenus is the same as for containers except at an ‘items in container’ level. Please refer to the container section for a description of these submenus at an item level.
View Containers and Indexed Items Simultaneously

The View Containers and Indexed Items Simultaneously Menu have two submenus: **Query by Example (QBE)** and **View Items and History**.

**Query by Example (QBE)**

The Query by Example screen allows a quick search feature for locating containers and indexed items in their respective inventories. A sample of the query by example screen is displayed on Fig.6.10.

![Query by Example Screen](image)

Fig. 6.10

The user can enter one field of data or several fields of data to locate a record or records. If the search is to be customer specific, enter the customer number in the ‘Client Id’ field or use the binoculars to access the ‘Locate Customer’ screen to identify the customer.

After criteria for the search has been entered, click on the <Search> button. Total Recall will search both inventories for matches to the criteria entered, these matches will display directly below the search screen.

To clear the screen and begin a new search, click on the <Clear> button.

To export the results of the QBE screen, click on the <Export> button, the screen to the right will display. Select the export type and enter a file name and/or a data path. Click on the <Export> button to export the file. If a path was not identified the file will be located in the Recall directory.

**View Items and History**

The View Items and History screen will allow a user to enter specific search criteria and view the search results along with the history of the items included in the search results.
A customer must be entered into the ‘Client Id’ field. The user can then enter search criteria in any of the designated fields, when all data has been entered the user will press the [ENTER] button to activate the search. Matching record(s) will display in the middle section of the screen with the history of those items displaying in the lower section of the screen.
Permanent Removals - Containers and Items In Containers

There are two menu options on the inquiry menu where the user can view a listing of permanent removals: Containers and Items In Containers. Both menus have three submenus: View List, Query Builder, and History. This section will detail these three menu options.

View List of Containers (Indexed Items)

The permanent removal inquiry screens display a listing of all containers (indexed items in containers) that have been permanently removed from the active database. These screens allow for viewing of data only. The containers permanent removal screen is shown on Fig. 6.12.

Permanent Removals - Containers Screen

The permanent removal screens display the last location where the container or indexed item was housed. The container and indexed item screens are identical in both appearance and functionality. The person requesting the removal and the date of the removal will display in the record provided that this information was entered at the time of the removal.

There are three quick search buttons on the permanently removed container screen, Total Recall container number, location and reference one. Besides these three quick search buttons, the indexed item permanent removal screen also allows for search on the Total Recall item number and the item ID field. Clicking on any of these buttons will prompt a locate items screen, similar to the one in Fig. 6.13.
Many of the quick search buttons require that the customer number be entered along with the search criteria. Total Recall will search for the record that matches or most closely matches the information entered. The record will display highlighted in the grid area. All other records will be sorted according to the quick search button selected for the search.

**Query Builder**

The Query Builder allows the user to Build, Run and Save Queries on the Container or Indexed Item databases. Query Results can be Exported, Printed, Globally Replaced or Matched against an Import File. *Note: See Chapter 1 – Query Builder for more information on Queries.*

**Container History/Indexed Item**

The Container and Indexed Item History screens allow the user to view and/or print Historical Container and Indexed Item Reports. When this option is selected the Print Report screen will display allowing the user to enter the Total Recall™ Container or Item Number and either Preview the Report or send the Report to a Printer.

If the container history is access, the user also has the option to identify the container record to be displayed by accessing a unique reference 1 search. When this search is invoked, a *Locate Items* screen will display allowing the user to enter the customer number and the unique reference 1 field. If a match is located the print report screen will display with the associated Total Recall container number the user can then elect to preview the history report or send the report to a printer. If a match is not found, the system message will display: ‘Item not found in Inventory’.
Departments By Customer

Some customers may wish to have all activity and services tracked by department. When using this feature, a department must be entered with every service performed. The Departments By Customer Inquiry allows the list of valid department codes to be viewed for any given customer. The screen on Fig. 6.14 displays a sample department inquiry screen, this screen allows for both viewing and editing of departments.

Click on the <Cust.> Quick search button at the bottom of the screen to display the locate items screen. Enter the customer ID and click on the <Search> button. The records will be re-sorted with the first record for this customer displayed, followed by all department records for the customer. To edit a record displayed, highlight the record and double click or click on the <Edit> button. The record will display in the edit mode and the user can modify the record and save the changes or revert to the original record.
Relocations By New Location

When a container or indexed item is relocated within the record center, the old and new locations are displayed on the screen along with the user who performed the relocation of the container/item. The work order number and work order line the relocation was performed on, and the date of the relocation is also displayed. The screen on Fig. 6.15 is a sample of a relocation browse screen.

Two quick search buttons enable the user to access the locate items screen: Total Recall container number and new location. Click on either of these buttons, enter the corresponding data and Total Recall will locate a match or the record that most closely matches the entered data. This screen also allows the user to filter records by using the <Search> button at the bottom of the screen. Note: Refer to Chapter 1 for more information about the search feature.
Facility Layout

The Facility Layout Inquiry screen allows the user to view any previously assigned locations built.

![Facility Layout Listing](image)

For each record in the facility layout database, the beginning and ending locations, description of the layout, storage code, number of units and eligibility information is displayed, providing that this information was entered at the time the facility layout was built.

The screen allows for a user to locate a record by entering a location into the location quick search button. Total Recall will quickly locate the location and highlight the matching or most closely matching record. Double clicking the record, or highlighting a record and clicking on the `<Edit>` button will activate the facility layout screen. The user can edit the record from this screen.
Available Locations

Fixed Location Storage Only - This Inquiry Menu option has two submenus: View List and Query Builder.

The View List screen lists all previously built locations. The screen on Fig 6.17 displays the Available Locations Inquiry screen. The query builder option allows the user to build and run queries based on criteria the user enters. Note: Refer to Chapter 1 Query Builder for more information on this feature.

View List of Available Locations

The Available Locations screen allows a user to quickly locate a record using the location quick search button. The Search feature is also available on this screen.

List of Available Locations Screen

The <Print> button allows the user to print the available locations by range or by batch.
Work Orders

The Work Orders Inquiry option has two menu options: **View List** and **Query Builder**. The work orders can be accessed through this option. The ‘Status’ column indicates the current status of the work order. This screen also allows for printing of reports related to the work order.

**View List**  A sample work order browse screen is shown on Fig 6.18

**Browse Work Orders Screen**

Two quick search buttons are available on this screen. Quick search by work order number and by customer number. These buttons activate the ‘Locate Items’ screen. When the data is entered and the search button is clicked, Total Recall will find the record the matches or closely matches the data entered. Highlight a work order record on this screen, double click the record or click on the <Edit> button to access the work order.

The browse work order screen allows the user to print a work order without displaying the work order. The work order reports and the operations reports can also be accessed from this screen.
Work Order History

The Work Order History Inquiry menu option has two submenus: Summary and Detail. Summary will display the work order summary data while Detail displays the actual line item details. From the detail option, there are three submenu options: Query by Example; Query Builder for all WO History; and View List of Transactions for Non-Archived History. A Work Order History Summary screen is displayed on Fig 6.19.

Summary

This screen allows the user to quick search by either a work order number or a customer. The information contained on this screen is the data entered on the work order header or the general tab from all prior period work orders.

Browse Prior Period Work Orders Screen

Fig 6.19

Detail

The Work Order History Detail screen allows the user to search for specific information contained on individual Work Order Lines. This option provides for three (3) ways to search the Work Order Lines: Query by Example, Query Builder for all WO History, and View List of Transactions for Non-Archived History. These options are detailed on the following pages.
Query by Example

The Query by Example screen for the Work Order Detail History displays on Fig 6.20.

![Query by Example Screen](image)

Fig. 6.20

The user can enter one field of data or several fields of data to locate a record or records. If the search is to be customer specific, enter the Customer number in the ‘Client Id’ field or use the binoculars to access the ‘Locate Customer’ screen to identify the customer.

After criteria for the search has been entered, click on the <Search> button. Total Recall will search the work order line history database for matches to the criteria entered, these matches will display directly below the search screen.

To clear the screen and begin a new search, click on the <Clear> button.

To export the results of the QBE screen, click on the <Export> button, the screen to the right will display. Select the export type and enter a file name and/or a data path. Click on the <Export> button to export the file. If a path was not identified the File will be located in the recall directory.

Query Builder for all WO History

The Query Builder allows the user to build, run and save queries on the work order line history databases. Query results can be exported, printed, globally replaced or matched against an import file. Note: See Chapter 1 – Query Builder for more information on Queries.

View List of Transactions for Non-Archived History

If this menu option is selected, the user can view all work order line history for all history that has not been archived. History is archived when it reaches a maximum size. The latest line history is displayed on this screen. A sample of the work order history details is displayed on Fig. 6.21.
From this screen the user can use the quick search buttons to quickly locate an item.
**Record Series**

The **Record Series** Inquiry option provides the user with two submenus. The **View List of Record Series** is detailed on Fig 6.22 and the **Query Builder** allows the user to build, run and save queries. *Note: See Chapter 1 - Query Builder for information on the query builder.*

**Record Series Code Maintenance Screen**

The screen above displays a sample of the Record Series Inquiry – View List screen. Double clicking on any of these lines or highlighting and clicking the `<Edit>` button will open the record series record for editing if necessary.
History of Barcode Scan Errors

The **History of Barcode Scan Errors** Inquiry option provides the user with three submenus: View List of Errors, Query Builder and View\Recover Barcode backup files.

**View List of Errors**  
Selecting view list of errors will display a current list of barcode scan errors and warnings. The errors and warnings may have been generated for various different reasons. These errors and warnings should be monitored on a regular basis to be sure that they are being reconciled.

**Query Builder**  
The query builder provides a useful tool with variable search characteristics for specific queries. Query builder allows the user to build, run and save queries. *Note: See Chapter 1 - Query Builder for information on the Query Builder.*

**View\Recover Barcode backup Files**  
This feature allows the user to quickly view and re-import a barcode scan file. When this option is selected a listing of all barcode scan files will be displayed. These will be displayed by the unique backup file number created when the file was imported. The user can use the time and date stamp to determine which file needs to be re-imported if this number was not recorded. When the file has been located, double click on the file and the import file will be displayed. A sample of one of these files is displayed on Fig. 6.23.

**ASCII Backup File Screen**

If changes need to be made to the import file they can be made on this screen being very careful not to remove any spaces or change the layout. Click on the `<Import>` button when the file is ready to import, this will rename the file and place it in the directory where it can be re-imported. The import screen will open allowing the user to re-import the file.

Fig. 6.23
CHAPTER SEVEN
Reports Menu
CHAPTER 7

Reports Menu

Overview

Reports provided by Total Recall are grouped according to their related functions and include the following areas: Management, Customer Reports, Work Orders, Department Reports, Operations, Accounting and Month End Reports.

There are two types of reports that print in Total Recall, Microsoft Visual Fox Pro® Reports and R & R Report Writer for Windows® Reports. The majority of the reports are developed through R & R Report Writer for Windows®. Total Recall ships with the ability to create new reports and edit existing Visual Fox Pro Reports through the Utility Menu. R & R Report Writer for Windows® is a separate software program that can be purchased through DHS Worldwide to customize existing reports or create new reports that print from R & R Report Writer program.

Total Recall ships with two 2) R & R Report Writer Report Libraries. RTRPTLI1.RP5 is the default or Standard Report Library and contains all the reports that are available within Total Recall. RTRPTLI2.RP5 ships as a blank report library. As customized reports are created they will be copied to this library. Each time Total Recall is upgraded a new report library 1 will be included, which may include new versions or updated reports. Library 2 will not be updated because of the customization that may have been made to this library. DHS Worldwide will provide a Custom Report Request Form to a user who requests a Custom Report. The Custom Report is usually added to the Customer’s Custom Report Library (Library 2). To print a Customized Report from Report Library 2, the user will need to select the ‘Print Custom Report’ checkbox on the Print Report Parameter screen. This can also be set on the Report Default Screen. Note: See Chapter 10 – System Menu – Report Defaults, for more information on setting Report Defaults.

Once you have decided which version of the regularly run reports suits your company best, set Total Recall to automatically default to that version. Note: Refer to Chapter 10 - System - Report Defaults for information on how to set the Report Defaults.

A user may select any option from the reports menu by using the mouse, highlighting the option and clicking that option or by using the arrow keys on the keyboard, highlighting the option and pressing the [ENTER] key. Once the report group option is selected, a submenu of available reports will display. The Reports Menu is displayed on Fig. 7.1.
When the reports menu is selected, a list of available reports will display. The user will select an individual report to print and the associated print report parameter screen will be displayed.

For all reports the user has the option to Preview, Print to a Printer or Print to a File. These options are detailed on the following pages.

**Printing Options**

**Print Preview**
If a user selects to Preview a report, the report will display on the computer screen. Depending on whether the report is an R & R Report Writer for Windows® report or a Visual Fox Pro® report, the tool bars to navigate the Preview window are different.

R & R Report Writer for Windows® Tool Bar is displayed on Fig. 7.2. The buttons are detailed below.

**Toolbar**

- ![Print All](image)
  - Click on this icon to send the entire report to the default printer.

- ![Print Current Page](image)
  - Click on this icon to send the currently displayed page only to the default printer.

- ![Magnify](image)
  - Click on this icon to magnify or enlarge the focus area of the report.

- ![Reduction](image)
  - Click on this icon to minimize or reduce the focus area of the report.

- ![First Page](image)
  - Click on this button to go to the first page of the displayed report.

- ![Previous Page](image)
  - Click on this button to go to the previous page of the report.

- ![Next Page](image)
  - Click on this button to go to the next page of the displayed report.
Click on this button to go to the last page of the displayed report.

Click on this button to pause the report if it is advancing pages.

Click on this button to close the print preview.

Visual Fox Pro for Windows® Report Designer Tool Bar is displayed on Fig. 7.3 the buttons on the tool bar are detailed below.

Toolbar

Click on this button to go to the first page of the displayed report.

Click on this button to go to the previous page of the displayed report.

This button allows the user to skip to a specific page number. The screen on the right displays when this button is selected. Enter the page and click on the <OK> button.

Click on this button to go to the next page of the displayed report.

Click on this button to go to the last page of the displayed report.

Adjusts the magnification of the screen.

Printer

If a user elects to send an R & R Report Writer report directly to the printer, the screen on Fig. 7.4 displays.

Printer
The default printer will display. The user has the option at this screen to select an alternate printer to print this report. Select the printer and click on the <OK> button to print the report.

If the user elects to send a Visual Fox Pro® report directly to the printer, the screen on Fig 7.5 will display.

### Print Screen

The user has the option here to select the printer, select specific pages to print and enter the number of copies to be printed. Make any selections and click on the <OK> button.

### Print To File

Total Recall allows the user to send any report to an ASCII file. To do so, select the parameters and click on the <File> button and then the <Print> button. The file will be created and dropped into the Total Recall directory. Each report has a report number listed on the print reports parameters screen and on the upper right hand corner of the report itself. This number is used as the file name for the report generated. The extension ‘.txt’ is added to the report.

To locate the report access the recall directory and locate the report number with the ‘.txt’ extension. **Note:** If a previous report exists in the recall directory with this file name, it will be overwritten.
Management Reports

Management reports are designed to assist in the overall operation of your facility. The Management Report option will display the screen on Fig. 7.6.

Use the mouse to select the Report to be generated and click on that Report. The Print Report Parameters screen will then display. The Parameter screen will vary depending on the Report selected.

The screen on Fig 7.7 displays a typical Print Parameter screen.

The top portion of the Print Parameters screen displays the Report Group, the Report Number and the Report Title. If a report is to be sent to a file, the report number in the upper right field will be how the report is titled when it is created.
The middle section of the Print Parameters screen is for user input. In the example above, the user has the option to select a customer or a range of customers, a removal date or range of dates, and a location. Total Recall will automatically default to the first and last customer numbers into the Beginning and Ending Customer fields and the current day’s date into the ending Removal Date field. Leaving the beginning Removal Date field empty will select all records for the specified customer(s) that have been removed. To select only those records that have been removed within a specific time frame, enter the Beginning and Ending dates. If the report is to only list containers removed from a specified range of locations, enter a Beginning and Ending Location range. The parameters will be specific to the report selected.

This middle section also allows the user to indicate a beginning and ending Page Number if the entire report is Not to be printed. If more than one copy of the report is needed, the user has the option to enter the number of copies in the '<# of Copies>' field. To print a report from the report library 2, click the checkbox to the right of the ‘Print Custom Report’ field.

The lower section of the Print Parameters screen displays the different versions that are available for the selected report. In the previous sample there are four versions available A, B, C, and D. Click on the circle to the right of the version letter to select the version. This section also allows the user to select whether to preview the report, send the report to a printer or send the report to a file.

*Note: To set the Parameter screen to automatically print a specified version and to automatically send to the Preview, Printer or File, refer to Chapter 10 – System – Report Defaults.*

Click on the '<Print>' button to Preview the Report, send the Report to a Printer or send the Report to an ASCII File.
Customer Reports

The Customer Reports Menu has two (2) submenu options: **Container Reports** and **Indexed Item Reports**. The user can select to Print Container or an Indexed Item Reports. Customer Containers or Indexed Items by Reference Fields, Expiration Dates, Retrieval Status, and Inventory Reports.

Container Reports

The Container Reports menu is displayed on Fig 7.8. The user can choose from a wide range of reports for containers. There are inventory lists by Customer and Reference fields, Expiration Reports, Retrieval Reports, Removal Reports and other Miscellaneous Reports.

*Note: If the Reference Fields have been customized in the System Parameters/Custom Caption screen, they will show here as the customized name and not as Ref 1, 2, 3....*
The screen on Fig 7.9 displays a typical Print Parameter screen.

The top portion of the Print Parameters screen displays the Report Group, the Report Number and the Report Title. If a Report is to be sent to a File, the Report Number in the upper right field will be how the Report is titled when it is created.

The middle section of the Print Parameters screen is for user input. In the example above, the user has the option to select a customer or a range of customers, and reference one data. Total Recall will automatically default to the first and last customer numbers into the Beginning and Ending Customer Fields and the Reference One Beginning Field blank while the Reference One Ending field displays as ‘ZZZZZZZZZZZ’. To select only those records that are between a specified Reference 1 Range, enter the Range in the Reference 1 Beginning and Ending fields. To display all records for a specified Customer regardless of the Reference one field, leave the Reference 1 Beginning field blank and leave the Ending Field as it defaults. The Parameters will be specific to the Report selected.

This middle section also allows the user to indicate a beginning and ending Page Number if the entire report is not to be printed. If more than one copy of the Report is needed, the user has the option to enter the number of Copies in the <# of Copies> field. To print a Report from the Report Library 2, click the checkbox to the right of the ‘Print Custom Report’ field.

The lower section of the Print Parameters screen displays the different versions that are available for the selected Report. Click on the circle to the right of the version letter to select the version. This section also allows the user to select whether to Preview the Report, send the Report to a Printer or send the Report to a File.
Note: To set the Parameter screen to automatically print a specified version and to automatically send to the Preview, Printer or File, refer to Chapter 10 – System – Report Defaults.

Click on the <Print> button to Preview the Report, send the Report to a Printer or Send the Report to an ASCII File.

Indexed Item Reports

The Container Reports menu is displayed in Fig 7.10. The user can choose from a wide range of Reports for Containers. There are inventory lists by Customer and Reference fields, Expiration Reports, Retrieval Reports, Removal Reports and other Miscellaneous Reports.

Note: If the Reference Fields have been customized in the System Parameters/Custom Caption screen, they will show here as the customized name and not as Ref 1, 2, 3....

Fig 7.10

Use the mouse to select the Report to be generated and click on that Report. The Print Report Parameters screen will then display (Fig 7.9). The Parameter screen will vary depending on the Report selected.
Customer Department Reports

Use the mouse to select the Report to be generated and click on that Report. The Print Report Parameters screen will then display (Fig 7.9). The Parameter screen will vary depending on the Report selected.
Work Order Reports

Work Order Reports include both Current Period Work Order Reports and Prior Period Work Order Reports that have been billed and sent to the History File. Fig. 7.12 shows the Work Order Report screen.

Use the mouse to select the Report to be generated and click on that Report. The Print Report Parameters screen will then display (See Fig 7.9) The Parameter screen will vary depending on the Report selected.
Operational Reports

The Operational Reports are designed to assist the user with the day-to-day operation of the Record Center. These Reports include Transaction Reports, Pick Lists and Put Away Lists and Printing of Container and File Labels. The Operation Reports menu is displayed on Fig 7.13.

Operations Reports Screen

Use the mouse to select the report to be generated and click on that report. The Print Report Parameters screen will then display. The Parameter screen will vary depending on the Report selected. This print parameter screen is similar to the one shown in Fig 7.9 and operates in the same manner.
Accounting Reports

The Accounting Report menu allows the user to Print Reports related to the Total Recall Accounting Menu. The Accounting Reports Menu is displayed on Fig. 7.14.

Use the mouse to select the Report to be generated and click on that Report. The Print Report Parameters screen will then display. The Parameter screen will vary depending on the Report selected. This print parameter screen is similar to the one shown in Fig 7.9 and operates in the same manner.
Month End Reports

The Month End Report Generator allows a user to setup all reports that are to be run upon completion of the Month End Close. The screen on Fig 7.15 displays the Month End Report Generator.

To set up Reports, the user would click on the <Add> button, a dialog box similar to the one shown at the right will display.

The user can scroll through the list of Available Month End Reports and highlight the Report to be Added. The user would then click on the <Select> button.

When a Report is selected the Print Parameters screen is displayed for the user to input specific Parameters. Click on the <Save> button when the Parameters have been set and this line will be Added to the Report Generator screen. Once all Reports have been Added, they can be Sorted by clicking on the <Sort> button.

If a Report needs to be Edited, Highlight the Report and click on the <Edit> button. The Parameter screen will open and allow for modifications. Click the <Close> button to Close the screen.

After Month End Close has been run, the user can go to the Month End Reports Generator screen, Edit any changes that may be necessary and click on the <Run> button, and walk away. Provided that there is paper in the Printer and the Printer does not jam, the user can leave the Reports to print overnight and return in the morning to a stack of printed reports.
CHAPTER EIGHT
Accounting Menu
CHAPTER 8

Accounting Menu

Overview

Total Recall has an accounting package accessed through the Accounting Menu. The Accounting Menu allows for editing and printing of invoices, inputting payments, accessing the accounting reports, calculating late fees, and calculating and printing a Month-to-Date sales report. The Accounting Menu also allows for exporting invoices to various Accounting Packages.

Select the Accounting menu option using the mouse or by holding the [ALT] key while pressing the letter [A]. Move through the menu using the arrow keys, or by clicking on any menu option with the mouse. This Chapter contains an outline of the Menu options followed by a more extensive description of each option. The Accounting Menu is displayed on Fig. 8.1

- **Monthly End Close**: This option closes out the current month. This process creates invoices for all billable customers, moves all closed work orders to the history table, and calculates statistics for all services performed during the billing period.

- **Edit/Create Invoices**: This option allows existing invoices to be edited and new invoices to be created. When editing an existing invoice, lines can be added or deleted. Transaction counts can be adjusted which will automatically adjust the amount charged, and the price charged can be edited.

- **Input Payment**: This option allows payment information to be posted to an invoice or to a customer and then an invoice. This process then updates the invoice balance. Payments can be posted and edited. Payments marked as bad checks or balances can be written off.
Print Invoices

The Print Invoices option accesses a Print Parameter screen that allows a user to print invoices by invoice numbers or invoice date; by a specific customer or range of customers; or print all unprinted invoices.

Accounting Reports

This menu option accesses the Account Reports Menu, and allows a user to print reports such as a Cash Receipts Journal, Accounts Receivable, Customer Statements, a Write-off Report, a Sales Detail Report and an Invoice Register. These reports can also be accessed from the Reports Menu.

Export Invoices

This option allows the user to export Invoices from Total Recall to several different Accounting Packages.

Sales Taxes

This option is used to set up Sales Tax Authorities and Sales Tax Codes when Invoices are to be exported to several of the Accounting Packages.

Month to Date Sales

This option will calculate the Sales to Date revenue for the current system month and generate a Report showing the Sales Activities for the current month.

Calculate Late Fees

This option allows the user to Add a Late Fee to Invoices not paid over a specified number of days. The percent of the Late Fee to be applied is on the Default tab of the Customer Maintenance screen.
Monthly End Close

Total Recall creates invoices and statistics by compiling work orders that have been closed and are within the date range specified during the Month End process. The invoices contain a record of all billable services performed for a customer, based on the service codes entered on each work order. The time required to complete this operation will depend on the number of containers and indexed items stored, the number of work orders processed throughout the month and the overall activity level of the record center. *Note: Multi-user systems should run the Month End Processing on the Server.*

In addition to establishing the charges for services that were recorded on closed work orders, Total Recall also counts the number of containers and indexed items in inventory and totals cubic footage (providing that cubic feet are associated with each container) for each customer. The Month End Close option has two sub-options; ‘Close Month’ and ‘Establish Default Month End Close Parameters’ We will discuss the ‘Close Month’ option first.

Close Month

The screen on Fig. 8.2 displays when the Close Month option is selected from the Accounting >Month End Close menu. The fields are described below.

**Month End Close Screen**

![End-of-Month Processing](image)

**Fig. 8.2**
<table>
<thead>
<tr>
<th><strong>Month to Close</strong></th>
<th>The Month to Close will automatically default to the current system month as displayed on the System Parameters screen.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Invoice Date</strong></td>
<td>The Invoice Date automatically defaults to the current date; however, this date can be modified. This date will display on the invoice as the ‘Invoice Date’. Typically this should reflect he last day of the month being billed.</td>
</tr>
<tr>
<td><strong>Auto-Start File Reorganize After Month End</strong></td>
<td>Auto-Start File Reorganize After Month End will allow Total Recall to automatically Re-Index and Compact the databases as the final steps of the Month End Close process. The default value for this option is <strong>&lt;Yes&gt;</strong>. Click <strong>&lt;No&gt;</strong> to turn this feature Off. <em>Note: To have the program perform more efficiently, it is advisable to allow this process to run at Month End.</em></td>
</tr>
<tr>
<td><strong>Count Indexed Items</strong></td>
<td>This feature allows the user to decide whether or not the Indexed Items are to be counted during Month End. If Storage is being charged for Indexed Items, do Not turn off this feature. If this feature is turned Off, Monthly File Statistics will not be processed.</td>
</tr>
<tr>
<td><strong>Create Detailed Report</strong></td>
<td>The Create Detail Report automatically defaults to <strong>&lt;Yes&gt;</strong>, with this feature engaged, Total Recall™ will create a Month End Detail database table that will allow for Month End Detail Reports to be printed.</td>
</tr>
<tr>
<td><strong>Create WO Summaries</strong></td>
<td>With this feature engaged, Month End Work Order Summaries will be created.</td>
</tr>
<tr>
<td><strong>Exclude Storage and Do Not Advance Month</strong></td>
<td>If this feature is changed to <strong>&lt;Yes&gt;</strong> Closed Work Orders within the date range specified will bill but Storage will not be Billed and the System Month will stay stagnant. This allows for mid-month billing without billing storage.</td>
</tr>
<tr>
<td><strong>Do Not Advance Month Storage Will Be Billed</strong></td>
<td>If this feature is changed to <strong>&lt;Yes&gt;</strong> Closed Work Orders AND Storage within the date range specified would bill and the System Month will stay stagnant.</td>
</tr>
<tr>
<td><strong>Exclude Recurring Invoice Items From Billing</strong></td>
<td>If this feature is changed to <strong>&lt;Yes&gt;</strong> Recurring work order items will be excluded from the billing process.</td>
</tr>
<tr>
<td><strong>Bill Work Orders</strong></td>
<td>This field automatically defaults to the current day's date but should be changed to reflect the Date that the Closed Work Orders are to be billed through. Depending on whether or not the Due Date or the Close Date is used during Month End Close, this option will display differently. <em>Note: See Chapter 10, System Parameters – Company / Billing ‘Tab’ for information on using the Due Date or the Close Date when running Month End Close.</em></td>
</tr>
<tr>
<td>----------------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Closed On Or Before</strong></td>
<td>The field automatically defaults to the current day's date but should be changed to reflect the Date that the Closed Work Orders are to be billed through. Depending on whether or not the Due Date or the Close Date is used during Month End Close, this option will display differently. <em>Note: See Chapter 10, System Parameters – Company / Billing ‘Tab’ for information on using the Due Date or the Close Date when running Month End Close.</em></td>
</tr>
<tr>
<td><strong>Begin Processing with Customer</strong></td>
<td>The field defaults to the first Customer in the Customer Listing. If Billing is to be done for a specific range of Customers only enter in this field the first Customer Number within the range.</td>
</tr>
<tr>
<td><strong>End Processing with Customer</strong></td>
<td>The field defaults to the last Customer in the Customer Listing. If Billing is to be done for a specific range of Customers only enter in this field the last Customer Number within the range.</td>
</tr>
<tr>
<td><strong>Monthly End Close</strong></td>
<td>Click on the <code>&lt;Monthly End Close&gt;</code> button to begin the Month End Close process. This process creates Invoices, calculates Statistics and moves all Billed Work Orders to History. Depending on the System Parameters, this process may or may not require exclusive use of Total Recall™. Although, if the system is set to Re-Organize after Month End, the program must be used Exclusively. <em>Note: For optimal performance, the Month End process should be run from the Server in a multi-user environment. The Computer/Server where Total Recall™ is housed should have ample disk space.</em> When the Month End process is complete, a screen will display stating ‘Month End Processing Complete! Start Time = nn:nn:nn Finish Time = nn:nn:mm’. This prompt notifies the user the amount of processing time the Month End process used. Click on the <code>&lt;OK&gt;</code> button.</td>
</tr>
<tr>
<td><strong>Exit</strong></td>
<td>Click on the <code>&lt;Exit&gt;</code> button to close the Monthly End Close screen and return to the main menu.</td>
</tr>
</tbody>
</table>
The following table describes procedures executed during End-of-Month Processing.

<table>
<thead>
<tr>
<th>Procedure</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Work Order Posting</strong></td>
<td>The Work Order Statistics Posting Process is the first operation executed. Total Recall automatically counts each service code completed on behalf of a customer, by customer and by department within each customer (if customer is Billed by Department). The totals are added to the transaction statistics for management and accounting purposes. Only service codes on closed work orders within the date range specified, will be included in the count, these are the only services that will be invoiced during this billing cycle.</td>
</tr>
<tr>
<td><strong>Create Charges</strong></td>
<td>Total Recall creates a charge file for the billing and accounts receivable system. The customer’s service code rate multiplied by the frequency of the service code equals invoiced amount. Tax is added if applicable.</td>
</tr>
<tr>
<td><strong>Work Order Price Update</strong></td>
<td>Work orders closed during the billing period are read by Total Recall to calculate the total cost, price and tax due for each work order. The charges are determined by the customer service code rates. Tax is applied if the service code is associated with a tax rate.</td>
</tr>
<tr>
<td><strong>Recurring Work Orders</strong></td>
<td>Recurring work orders are work orders that Total Recall automatically generates each month. In this process, Total Recall reads all the active work orders, searching for recurring work orders. If one is located, a new work order with the next work order number is created with the same line detail as the original work order.</td>
</tr>
<tr>
<td><strong>Recurring Billing Lines</strong></td>
<td>Total Recall allows for Recurring Billing Lines to be created and automatically added to invoices as part of the month end process.</td>
</tr>
<tr>
<td><strong>Work Order Detail and Summaries</strong></td>
<td>Total Recall will create month end detail statistics that can then be accessed through reports on the Accounting Report Menu.</td>
</tr>
<tr>
<td><strong>Archiving Work Order File</strong></td>
<td>Total Recall™ maintains two separate work order tables. The first contains active work orders, those processed during the current billing period. The second table contains historical work orders that have been closed during previous billing periods. This process moves work orders from the active table to the historical table.</td>
</tr>
<tr>
<td><strong>File Re-Organizing</strong></td>
<td>This process Re-Indexes and Compacts all of the Database tables in Total Recall™, this process can be turned off on the Month End Close screen.</td>
</tr>
<tr>
<td><strong>Updating System Month</strong></td>
<td>The final procedure is to update the Current System Month. The Current System Month indicator is located on the Company / Billing screen of the System Parameters screen.</td>
</tr>
</tbody>
</table>
Edit/Create Invoices

The Edit/Create Invoice option allows the user to edit an existing invoice or create a new invoice. An invoice can be modified by editing, adding or deleting a line on the invoice. A screen similar to the one on Fig. 8.3 displays when this option is selected.

**Edit Invoices Screen**

The top portion of the Edit Invoice screen allows the user to quickly search for invoices meeting the criteria input. The grid area of the screen displays the invoices, which can be scrolled to the right and back to the left and up and down. The lower portion of the screen has additional search options and navigational buttons.

**Searching For Invoices**

Total Recall searches for an invoice or a group of invoices in several ways:

- **Accounts within Range** In the upper portion of the Edit Invoice screen, the user can click on the check box to the left of the ‘All accounts starting with’ field and enter a range of customer first initials. After entering the customer initials, click on the `<Start Search>` button. Total Recall will search for and display only those records indicated by the criteria entered. To re-display all invoices, click on the `<Show All Invoices>` button.
Delinquent Accounts

In the upper portion of the Edit Invoice screen, click on the check box to the left of the ‘Delinquent Accounts’ field and select from the drop down menu to indicate the number of days delinquent 30, 30-60, 60-90, 90+. The user can also select to view only a range of customers by indicating a first initial of a customer in the ‘Starting with’ fields. Click on the <Start Search> Total Recall will search for the invoices within the ranges indicated and display only those invoices on the screen.

Last Pay Date Range

On the Edit Invoice screen, click on the check box to the left of the ‘Last Pay Dates Between’ and enter the Last Pay Dates criteria to Search, or select to view only a range of customers. Click on the <Start Search> button and Total Recall will search for the invoices with Last Pay Dates within the ranges indicated and display only those invoices on the screen.

By Invoice #

To go directly to an invoice number enter the number into the ‘Go to Invoice #’ field in the lower portion of the screen and press the [ENTER] button on the computer keyboard. The selected invoice will be located and highlighted on the screen.

Customer Speed Search

Click on the button labeled <Customer Speed Search>. The screen on Fig. 8.4 will display. The user will enter a customer number into the ‘Customer #’ field and press [ENTER], the customer name will display and the user can press [ENTER] again or click on the <Find> button to instigate the search. The records will re-order, and the first Invoice for the selected customer will be highlighted followed by the remaining records for the selected customer.

View Unpaid Invoices

Click on the <View Unpaid Invoices> button and only invoices that do not have a payment posted against them will display. Once this option is selected, the button displays as <View All Invoices>, click to return the display to viewing all invoices.

Filtered Search

Click on the <Search> button to initiate the Boolean Search. Specific search criteria can be enter and only those records matching the criteria will display.
Creating Invoices

Invoices are created during the Month End Process. In the event that an invoice needs to be created manually, click on the <Add> button at the bottom of the Edit Invoices screen. A screen will prompt the user to enter a customer number. Enter the customer number or use the drop down menu to select a customer for whom the invoice will be created. Click on the <Add> button. A screen similar to the one in Fig. 8.5 will display.

![Edit Invoice Screen](image)

An invoice number and date has been assigned. To add lines to the invoice click on the <Add Line> button on the right of the screen, and the ‘Add Invoice Line’ screen on Fig. 8.6 will display.

![Add Invoice Line Screen](image)
From the ‘Add Invoice Line’ screen, the user can enter a Service Code and the Description and Price will display. If the customer is departmentalized, enter the department in the corresponding field. The user must also enter the `<# of Transactions>` in the designated field. The totals will then display. If the line that needs to be added is not associated with a service code, enter the description of the charge in the Description field, followed by the price and the number of transactions.

Click on the `<Save>` button to add the line to the invoice or click on `<Cancel>` to discard the line and return to the invoice screen. As lines are added to the invoice, the `<Edit Line>` and `<Delete Ln>` buttons on the right side of the screen become enabled. Also, the invoice amount in the upper portion of the invoice screen will adjust to meet the current line totals.
Editing Invoices

The user can Edit any Invoice created through the Month End process or through manually Creating an Invoice. From the listing of Invoices screen, the user can use any of the Search options and select an Invoice to be Edited. Highlight the Invoice to be Edited, and double click to open the Invoice Detail or click on the <Edit> button to open the Invoice Detail.

Edit Line  Highlight the invoice line to be edited and double click or click on the <Edit Line> button to the right of the screen. This will prompt the screen on Fig. 8.7

Edit Invoice Line Screen

Fig. 8.7

From this screen, the user can change the service code, add or modify a department enter a general ledger number, change the price or the number of transactions. Any of these changes will automatically update the line total, if necessary. Click on <Save> when the changes are complete to add your changes to the invoice line. Click on <Cancel> to discard your changes and return to the edit invoice screen. If the user clicks the cancel button after changes have been made, Total Recall will prompt the user as to whether the changes are to be saved. If a service code price is changed, Total Recall will prompt the user: ‘Do you wish to update the price for Service Code to its current price of xxx?’ To make this a permanent price change for the service code for the customer, click <Yes>, otherwise, if this is a one-time change, click <No>. The invoice total will be adjusted automatically when an invoice line is edited.
**Delete Ln**  Individual lines can be deleted from an invoice. Highlight the invoice line to be deleted and click on the `<Delete Ln>` button to the right of the screen. This will prompt the confirmation screen: ‘Do you wish to Delete this Invoice Line?’ Click on `<Yes>` to completely delete this invoice line, click on `<No>` to keep the invoice line and return to the Edit Invoices screen. The invoice total will be adjusted automatically when an invoice line is deleted.

**Add Line**  From the ‘Add Line’ screen, the user can enter a service code and the description and price will display. If the customer is departmentalized, enter the department in the corresponding field. The user must also enter the `<# of Transactions>` in the designated field. The totals will then display. If the line that needs to be added is not associated with a service code, enter the description of the charge in the description field, followed by the price and the number of transactions.

When giving a credit for a prepaid amount, enter a description and the price amount as a negative number for the amount credited. Ex: If the amount being credited is $100.00, enter the amount as -100.00 on the Price field and 1 on the # of Transactions field. This will create a line with a negative amount. The user can then go into the Customer Maintenance screen and remove the amount from the $ Prepaid field on the ‘Billing Options’ tab.

Click on the `<Save>` button to add the line to the invoice or click on `<Cancel>` to discard the line and return to the invoice screen. As lines are added to the invoice, the invoice amount in the upper portion of the invoice screen will adjust to meet the current line totals.
Comments

Once an invoice has been selected, from the Edit Invoice screen, the user has the option to add ‘Comments’ to the invoice. Depending on which section the user enters the comments; they may or may not appear on the customer’s invoice. To view the comments screen, click on the ‘Comments’ tab using the mouse. A screen similar to the one on Fig. 8.8 will display.

Comments Screen

The first field displays a listing of all work order numbers that were billed on the selected invoice. The second section is used to enter comments related to the collection of funds. These comments will Not appear on the customer’s invoice. The third section is for the user to enter a comment that will Print on the current invoice only.
Work Order Detail

The Work Order Detail ‘Tab’ of the invoice screen summarizes all the Work Order Line Totals that were billed on the currently displayed invoice. Information on this screen can be edited by double clicking on the line to be edited. The system message will prompt the user: ‘Warning… Altering entries in the work order detail table not match the values on the actual Work Orders and Invoices!’ Lines should be edited with caution.

Work Order Detail Screen

Month End Detail

The Month End Detail ‘Tab’ displays the Individual Lines that were contained on the Work Orders billed on the currently displayed Work Order. Lines on this screen can be edited by double clicking on the line.
**Input Payment**

The Input Payment screen has two submenus: **Post By Invoice #** and **Post by Customer**. Each of these submenus post payments against outstanding invoices.

Total Recall maintains the current status of each invoice that has been created. The Input Payments option allows payments to be posted either by invoice number or by customer number. When the Input Payment - Post by Invoice # option is selected, the post payments screen on Fig. 8.10 is displayed.

The top portion of the ‘Post Payments’ screen allows the user to quickly search for invoices meeting the criteria input, much like the Edit/Create Invoice screen. The grid area of the screen displays the invoices, which can be scrolled to the right and back to the left and up and down. The lower portion of the screen has additional search options and navigational buttons.

### Post by Invoice

Total Recall allows the user to search for an invoice to apply a payment to in several ways.

- **Accounts within Range** In the upper portion of the Edit Invoice screen, the user can click on the check box to the left of the ‘**All accounts Starting with**’ field and enter a range of customer first initials. After entering the customer initials, click on the `<Start Search>` button. Total Recall will search for and display only those records indicated by the criteria entered. To re-display all Invoices, click on the `<Show All Invoices>` button.
Delinquent Accounts

In the upper portion of the Edit Invoice screen, the user can click on the check box to the left of the ‘Delinquent Accounts’ field and select from the drop down menu to indicate the number of days delinquent 30, 30-60, 60-90, 90+. The user can also select to view only a range of customers by indicating a first initial of a customer in the ‘Starting with’ fields. Click on the <Start Search> Total Recall will search for the invoices within the ranges identified and display only those invoices on the screen. To re-display all invoices, click on the <Show All Invoices> button.

Last Pay Date Range

In the upper portion of the Edit Invoice screen, the user can click on the check box to the left of the ‘Last Pay Dates Between’ and enter the Last Pay Dates criteria to search. The user can also select to view only a range of customers by indicating a first initial of a customer in the ‘Starting with’ fields. Click on the <Start Search> button and Total Recall will search for the invoices with last pay dates within the ranges indicated and display only those invoices on the screen. To re-display all Invoices, click on the <Show All Invoices> button.

By Invoice #

To go directly to an invoice number enter the number into the ‘Go to Invoice #’ field in the lower portion of the screen and press the [ENTER] button on the computer keyboard. The selected invoice will be located and highlighted on the screen.

Customer Speed Search

Click on the button labeled <Customer Speed Search>. A screen similar to the one on Fig 8.11 will display. The user will enter a customer number into the ‘Customer #’ field and press [ENTER], the customer name will display and the user can press [ENTER] again or click on the <Find> button to instigate the search. The records will re-order, and the first invoice for the selected customer will be highlighted followed by the remaining records for the selected customer.
View Unpaid Invoices: Click on the <View Unpaid Invoices> button and only invoices that do not have a payment posted against them will display. Once this option is selected, the button displays as <View All Invoices>, click to return the display to viewing all invoices.

Filtered Search: Click on the <Search> button to initiate the Boolean Search. Specific search criteria can be entered and only those records matching the criteria will display.

When an invoice has been selected to Post a Payment against, click on the <Edit> button, or double click on the Invoice line and the ‘Collection Screen’ in Fig. 8.12 will display.

Collection Screen

Fig. 8.12

Post Payment: From the Collection screen, the user has the option to Post a Payment or Write Off a Balance owed. Click on the Post Payment button. The input screen on Fig. 8.13 will display. The screen will prompt the user for payment information. The fields on this screen are described below.

Post Payment Screen

Fig. 8.13
Payment Type  Click on the down arrow to the right of this field to select a Payment Type, select from Cash; Check or Credit. Highlight your choice and double click with the mouse.

Payment Date  Enter the date the payment was received at the record center.

Collect Amount  Enter the total dollar amount collected from the customer.

Principal Collected  This amount will automatically default to the amount collected that was applied towards the principal balance, not including the Sales Tax.

Check/Ref #  Enter the check number or a reference number to identify the payment.

Last Pay Date  This field will indicate the last payment date for the displayed invoice, if a partial payment was previously received.

Invoice Amount  This field will indicate the total amount of the original invoice.

Sales Tax Amount  This field indicates the amount of the invoice that reflects the sales tax.

Sales Tax Collected  This field indicates the amount of the payment that reflects the sales tax actually collected.

Balance  Displays remaining balance, if any, after the payment was received.

Comments  This field is a ‘free text’ field for the user to indicate any additional pertinent information regarding the invoice payment.

When the Post Payment screen is saved and the total amount of the invoice has been collected, the screen will prompt the user: ‘This Invoice is Fully Paid’, click on <OK> to return to the collection screen.

Edit Payment  After a payment has been entered, and it is discovered that the payment type, date or amount was entered incorrectly, the payment line can be edited by highlighting and double clicking with the mouse or highlighting the line and click the <Edit Line> button. The user can then make modifications to the existing Data.
**Bad Check**  
If after a payment has been posted against an account and the check is received back to the record center unpaid from the bank, from the collection screen the user can click on the `<Bad Chk>` button. The following prompt will appear: ‘Do you wish to mark this payment as a bad check?’ Click on `<Yes>` and the amount of the check will be added back into the balance due, and the payment will reflect as a bad check. Click on `<No>` to discard this action. When a payment is received to cover this check, a new payment would need to be posted against the invoice.

**Write Off**  
If the invoice balance or portion thereof is not collectable, the user has the ability to ‘Write Off’ the remaining balance. Click on the `<Write Off>` button, and the following prompt will display: ‘Do you wish to Write Off the Invoice Balance?’ Click on `<Yes>` and the balance will remain as the amount owed but the status will change to ‘Write Off’. Click on `<No>` to discard this action.

**Restore**  
If a balance was previously Written Off and now the invoice has been paid, click on the `<Restore>` button to restore the balance and allow for a payment to be posted against the invoice. When the restore button is clicked, the following message displays: ‘Do you wish to Restore this Invoice to Active status?’ Click on `<Yes>` to restore the balance or `<No>` to keep the Write Off Status.

**Post by Customer**  
Total Recall allows the user to post payments to invoices by the customer number. Fig. 8.14 displays when this option is selected.
Select a customer by clicking on the binoculars to the right of the ‘Customer’ field and access the ‘Locate Customer’ screen to identify the customer. The user can also use the <Customer Speed Search> button or the <Search> button to select the customer to which the payment is to be applied.

With the customer displayed, all outstanding invoices will display in the ‘Grid Area’ of the ‘Post Payments’ screen. To post a payment click on the <Edit> button. The ‘Pay Date’ field will automatically display the current day’s date. This date can be modified if necessary. Select the payment type from the ‘Type’ drop down. Enter a check or reference number in the field titled ‘Check/Ref #’. Click in the ‘Amount Paid’ column of the invoice to which a payment is to be applied, enter the amount paid. If more than one invoice is being paid, continue entering payments. As payments are entered, the ‘Total Posted’ field will update with the total dollar amount posted. When the payment(s) have been entered, click on the <Save> button to post the payments against the customer/invoices or click on the <Revert> button to exit the post payment screen without saving the payment(s) entered.
Print Invoices

The Print Invoices option allows the user to print one invoice or a group of invoices. Invoices can be previewed, printed or created as an ASCII text file. Fig. 8.14 displays when this option is selected.

From the Print Invoices screen, the user can enter a customer or range of customers, an invoice number or range of numbers, an invoice date or range of dates or can simply choose to print all unprinted invoices by clicking in the box to the left of the field ‘Print Invoices that have Not been Printed’. The version can be changed, to print a version other than the default version. Select where the report is to be sent, to the computer screen (Preview), to the printer or to a file. The user would then click the Print button to generate the invoice report. If the report was sent to a printer, a separate print screen will display allowing the user to change the printer. Note: To set a default invoice version, refer to Chapter 10 - Report Defaults.
Accounting Reports

The Accounting Report Menu allows the user to print or preview reports related to the Total Recall invoicing and accounting functions. The Accounting Reports menu is displayed on Fig. 8.15. This menu can also be accessed from the reports menu. Note: Please refer to Chapter 7 for more information on the different report options.

![Accounting Reports Screen](image)

Fig. 8.15
Export Invoices

The Export Invoices option will allow the invoices created in Total Recall to be exported to numerous commercial accounting packages. If invoices are being exported to an accounting package, normally payments are not entered into Total Recall. Payments are entered into the Accounting Program. The Export Invoice option lists all the accounting Packages Total Recall currently Exports to, if the package your Record Center uses is not listed, contact DHS Worldwide about integration.

The screen on Fig. 8.16 displays a typical Invoice Export screen. Depending on the Accounting Package requirements, this screen may vary slightly.

The Range of available Invoices to be Exported is displayed. Invoices listed within this range are Invoices that have Not been previously Exported and do Not have a Payment applied against. If previously Exported Invoices need to be Re-Exported click the checkbox to the right of the field ‘Re-Send Previously Exported Invoices’.

Click on the <Export> button to Export the listed Range of Invoices. After Invoices have been Exported, the last field on the screen will display ‘Processing Complete’.

The Export File name that is created, is dependent upon the requirements of the Accounting Package. Refer to Documentation included with your Accounting Package for details on Importing the Invoice Files to the Accounting Package.
Sales Taxes

The Sales Tax Menu option has two submenu options: **Sales Tax Codes** and **Sales Tax Authorities**. These two menu options are necessary if invoices are to be exported to various accounting packages.

**Sales Tax Authorities**

Tax Authorities are a list of the taxes that are to be collected for the different authorities such as state tax, county tax and city tax. The screen below displays the Sales Tax Authorities with three Taxing Authorities setup.

![Sales Tax Authorities Screen](image)

To Add an Authority, click on the `<Add>` button. Enter a Tax ID, the Tax Authority Description, the Tax Rate, the General Ledger number (corresponding with the General Ledger number in the Accounting package), and the entity to which the Tax is Paid. When all information has been entered, click on the `<Save>` button, this will add a line to the Sales Tax Authority screen. Continue adding authorities in which the record center pays taxes to by clicking the `<Add>` button to begin a new authority.

**Sales Tax Codes**

Sales Tax Codes are a collection of Tax Authorities that make up the total tax. A single tax code can have up to five tax authorities. These Sales Tax Codes are then to be entered on the customer maintenance screen in the `<GL Tax Cd>` field.
To create a tax code, click on the <Add> button and enter a tax code identifier and a description. In the lower portion of the screen, click in the ‘ID’ column. Enter an associated tax authority previously setup on the tax authority screen. The tax authority description, rate and G/L account number will automatically display. The sales tax rate will total at the bottom with each tax ID that is added. The total tax rate for a tax code is the sum of the tax authority rates. There may be several tax codes depending on how many states, counties, or cities the record center services, and the combination of taxes paid to each entity.

Once the tax codes are created, these codes will then need to be entered on the customer maintenance screen in the <GL Tax Cd> field for each billable customer. When this field is entered, the associated tax rate automatically displays.
Month to Date Sales

The Month to Date Sales option has two submenu options: **Calculate MTD Sales** and **Reprint MTD Sales Report**.

**Calculate MTD Sales**

This feature allows a user to, at any time during the current month, calculate the current months revenue. Depending on the size of the record center, the hardware, and the network system, this report can take from several minutes to several hours to generate. When this menu option is selected, Total Recall will prompt the user: ‘This procedure can take a very long time to run depending on the size of your inventory and activity. Do you wish to continue?’ To continue with the process, click the <Yes> button. To cancel the process, click the <No> button. When the process has been run and is complete, the system will prompt the user: ‘Do you wish to print a MTD report?’ Click <Yes> to preview or print the report, or click <No> to print the report at a later time.

**Reprint MTD Report**

The second option under the Month to Date Sales menu allows the user to reprint the last generated month to date sales report. By clicking on this option, a print parameter screen will display for the user to preview the report on the screen or send the report to a printer or a file. Version A of the report prints by Customer and Version B prints by Service Category Code.
**Calculate Late Fees**

The final menu option on the Accounting Menu allows the user to apply Late Fees to Accounts that are past due by a pre-defined number of days. The Customer Maintenance screen has a field for the user to enter the percentage of Late Fee to be charged per Customer. The following screen displays when this option is selected.

![Late Charge Processing](image)

The user would need to indicate the number of days delinquent to add late fees in the field indicated. Click on the <Calculate> button to apply late charges to the delinquent accounts. When complete, Total Recall will inform the user to the total amount of late fees added to delinquent invoices. A line indicating the late fees will be added to each individual invoice where a late fee was added. The service code that is used is ‘LAT’ with the service code description of ‘Late charges added on MM/DD/YY’. Statements can then be printed that will display the late charges.
CHAPTER NINE
Utility Menu
CHAPTER 9

Utility Menu

Overview

The Utility Menu is used to maintain the integrity of the tables in the Total Recall Databases and execute system maintenance routines. The execution time of these operations will depend on the number of items stored and the activity of the record center and computer equipment. Many of the features in this menu require a user to have exclusive use of the system to execute the procedure. Executing procedures from the server will decrease the run time. Fig. 9.1 shows the options for the Utility Menu. This chapter contains a description of each Utility feature accessed from this menu.

Utility Menu

<table>
<thead>
<tr>
<th>Database Administration</th>
<th>Database Compacting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Database Indexing</td>
<td>End-of-Year Processing</td>
</tr>
<tr>
<td>Database Compacting</td>
<td>Rebuild Available Locations</td>
</tr>
<tr>
<td>Customer ID Conversion</td>
<td>Dept ID by Cust Conversion</td>
</tr>
<tr>
<td>Shelf Labels</td>
<td>Export Customer Information</td>
</tr>
<tr>
<td>Print Container Labels</td>
<td>Convert ASCII File To Work Order</td>
</tr>
<tr>
<td>Convert Items</td>
<td>Calculate Contingency Retirements</td>
</tr>
<tr>
<td>Verify Indexed Item Locations</td>
<td>Media Verification Module</td>
</tr>
<tr>
<td>Label/Report Designer</td>
<td>Run Custom Reports</td>
</tr>
<tr>
<td>Run Custom Labels</td>
<td></td>
</tr>
</tbody>
</table>

Fig. 9.1

**Database Admin** The Database Administration feature allows a user to validate the database, open Total Recall tables exclusively and in multi-user mode, and compress database containers.

**Database Compacting** As records are deleted in Total Recall, they are marked for deletion and are no longer visible in the database table. This option removes the deleted records from the database for more efficient operation.

**Database Indexing** This option recreates one or all of the index files. Indexes are the keys to database tables and enable Total Recall to perform quick data searches. Re-Index the database if records begin printing out of order or if existing records cannot be accessed.

**End-of-Year Processing** This option resets transaction histories to “0” in your master service code files, customer service code files and department service code files.
Rebuild Available Locations

**Fixed Allocation** - This option allows the available locations file to be recreated. An error log is included to allow the user to view discrepancies between records.

**Dynamic Allocation** – This process may need to be run occasionally to rebuild the facility layout.

Customer ID Conversion

This option allows the modification of an existing customer number and all associated records for that customer. This option also allows for the merging together of two customers.

Department ID by Cust. Conversions

This option allows the user to modify a customer’s department number and convert all the corresponding records.

Shelf Labels

This option prints shelf labels. Shelf labels can also be printed from the Facility Layout in the Maintenance Menu. Printing the labels from the Facility Layout screen, builds a warehouse layout table that will be beneficial in locating available space of possible areas of concern.

Export Customer Information

This option will export Total Recall customer information to QuickBooks 4.0 for Windows®. This should be run prior to exporting invoices to Quick Books if new customers have been added.

Print Container/File Labels

This option allows the user to print both container and file labels. There are three options available under each submenu: Preprint Labels; Open WO Labels; and Reprint Labels.

Convert ASCII file to Work Order

This option allows a user to import an ASCII file to a work order, import an ASCII file for tape rotation pulls and new adds, manage fiche and import a custom ASCII file.

Convert Items

This option allows a user to convert a container to an indexed item or convert an indexed item to a container.

Calculate Container Removals

This utility will calculate the number of times that a container has been retrieved and place this information in the specified field of the container maintenance screen.

Verify Index Item Locations

This option allows the user to verify that all indexed items are in their correct container locations.

Media Verification Module

This module allows the user to verify media storage items against an ASCII imported file.
Database Administration

The Database Administration feature has four submenu options: Validate the Total Recall Database, Open Total Recall Tables in Exclusive Mode, Open Total Recall Tables in Multi-user Mode, and Compress Database Containers. All of these features, except opening tables in Multi-user mode, require exclusive use of Total Recall. If the message: ‘File Accessed Is Denied’ displays, another user is logged into Total Recall. To verify users currently logged into Total Recall, select the ‘Users Logged On’ option from the System Menu.

**Validate Recall Database**

From the Utility Menu - Database Administration option, click on the Validate Database option. Total Recall will prompt the user: ‘This function requires exclusive use of the program! All other users must be logged out of the program! Continue?’ The user must have exclusive use of Total Recall to proceed. Total Recall consists of database tables and index tags, and this process verifies that all database tables and index tags listed in the structure of the program are in existence. If one or more of these tables or tags are missing or corrupted, an error message will display. Contact Technical Support at DHS Worldwide, with any error message displayed when activating this feature.

**Open Total Recall Tables in Exclusive Mode**

This feature allows the Database Administrator to open Total Recall in Exclusive Mode. Once opened, any user attempting to log in will receive a ‘File Access is Denied’ message. Click on the ‘Open Total Recall Tables in Exclusive Mode’ from the Utility Menu - Database Administration option, Total Recall will prompt the user: ‘This function requires exclusive use of the program! All other users must be logged out of the program! Continue?’ To continue click on the <Yes> button.

**Open Total Recall Tables in Multi-user Mode**

From the Utility Menu - Database Administration option, the open Total Recall Tables in Multi-user Mode allows the user to re-open tables in a Multi-user Mode providing that Total Recall is a multi-user version. If Total Recall was opened in Exclusive mode, this feature allows the user to place Total Recall in a Multi-user mode without Logging Out and back into Total Recall.

**Compress Database Containers**

This feature should be used only if disk space is at a minimum and the user needs to free up a small amount of disk space. The user must have exclusive use of Total Recall™ to use this feature. This feature will compact the three Recall Container Database files (Recall.dbc, Recall.dct and Recall.dcx). Depending on the size of these files and the amount of modifications that have been made in Total Recall™ will determine how much disk space can be made available. If disk space is at a minimum, the user should first Compact the Database tables. More space is likely to be freed up by using the Database Compacting feature than Compressing the Database Containers.
Database Compacting

The database compacting option purges all records marked for deletion and renumbers the remaining records. When a record is deleted in Total Recall, the record is marked for deletion, but not actually erased from the database table. The record is hidden from the user, however; the record still resides in the database table. This utility completely deletes these records.

The user can opt to compact just one table, several tables or all of the database tables. The screen below displays when this option is selected. Note: If records have been deleted, that need to be recovered and should Not be erased from the database, do NOT proceed with this function. Once tables have been compacted, records cannot be recovered that may have been accidentally deleted.

This function requires EXCLUSIVE use of Total Recall. All users, except the user initiating this utility, must be completely logged out of Total Recall. Indicate the tables to be compacted by clicking on the button or buttons associated with the tables to be compacted. To compact all the database tables, click on the <All> button, every button will depress except the history tables. The history tables can be very large and time consuming to compact, to include these tables in the compact click on both buttons after the <All> button has been clicked. With the Button(s) clicked, to begin the compacting of the tables click the <OK> button.

Note: Prior to Running a Compact be sure to check disk space – you must have at least twice as much free space available as the Recall directory contains.
If the message: ‘File Accessed Is Denied’ displays, when the <OK> button is clicked, a user other than the user attempting to compact the database tables is logged into Total Recall.

Depending on the size of your database tables, the speed of your computer and the network being used, this utility can take several minutes to many hours to complete and should be run from the server if possible. For large record centers, if all databases are to be compacted, the user may elect to initiate this feature at the end of the day to process overnight.

As the tables are compacted, the buttons will pop back out to show the progress of the compacting. When the compact is completed, Total Recall will prompt the user: ‘Compacting Complete Start Time = nn:nn:nn Finish Time = nn.nn.nn’. Note the time it took to compact for future reference and click the <OK> button, the Main Menu will then display.
Database Indexing

This option will re-create one or all of the Index Tags for the Database Tables. Indexes are the keys to Total Recall’s ability to perform quick searches for Data. If records begin printing out of order or existing records cannot be accessed, Indexing the Database Table usually resolves this issue. The Index Tables screen is shown below.

Index Tables Screen

This function requires EXCLUSIVE use of Total Recall. All users, except the user initiating this utility, must be completely logged out of Total Recall. Indicate the tables to be indexed by clicking on the button or buttons associated with the tables to be indexed. To index all the database tables, click on the <All> button, every button will depress. With the Button(s) clicked, to begin the indexing of the tables click the <OK> button.

Note: Prior to Running a Re-Index be sure to check disk space – you must have at least twice as much free space available as the Recall directory contains.

If the message: ‘File Accessed Is Denied’ displays, when the <OK> button is clicked, a user other than the user attempting to Index the Database Tables is logged into Total Recall.

Depending on the size of your Database tables, the speed of your computer and the network being used, this utility can take several minutes to many hours to complete and should be run from the Server if possible. For large Record Centers, if all Databases are to be Indexed, the user may elect to initiate this feature at the end of the day to process overnight.
End Of Year Processing

Each time a Month-End Close is completed, Statistics relating to the Master, Customer and Department Service Codes are compiled, displayed and stored in the Transaction History of the respective Service Code screens. These statistics are displayed with a Year-To-Date total. The End-of-Year Processing feature resets all of these Transaction Histories to ‘0’ and back up the statistics in three separate database tables: yyyyserv.dbf, yyyycust.dbf and yyydept.dbf. The first four digits of the file name for each file is the year.  

Note: To maintain statistics year round, do Not perform a Yearly End Close. Instead, each month as the Month End Process is being performed Total Recall will prompt the user to clear Statistics – Indicating ‘Yes’ will clear Statistics from Bill Month in the current Statistical table, allowing the ability to always view a full year of Statistics.

This process should be completed prior to initiating the first Month End Close of the New Year (typically January). This function requires EXCLUSIVE use of Total Recall. All users except the user initiating the End of Year process must be completely logged out of Total Recall.

The screen on Fig. 9.4 displays the End-of-Year process selected from the Utility Menu.

End-of-Year Screen

Prior to initiating the End-Of-Year process, be sure that all Statistical reports are printed. These may include, but are not limited to, the Facility, Customer and Department Profile Reports that list the number of transactions each month and the Year to Date totals. These reports can be found on the Management Reports menu.

Click on the <Yearly End Close> button to initiate this process. If the message: ‘File Accessed Is Denied’ displays, when the <OK> button is clicked, a user other than the user attempting to perform the Year End Close process is logged into Total Recall. When this process is complete, a window will display: ‘Year End Processing Complete!’ click on the <Exit> button to return to the Main Menu.
Rebuild Available Locations

**Fixed Location Storage** – Containers are Permanently Removed or Relocated; space within the record center becomes available for new containers. This option re-builds the available locations file. This function requires **EXCLUSIVE** use of Total Recall. All users, except the user initiating this utility, must be completely logged out of Total Recall. Depending on the size of your database tables, the speed of your computer and the network being used, this utility can take several minutes to many hours to complete. The user may elect to initiate this feature at the end of the day to process overnight from the server. The screen on Fig. 9.5 displays when the Rebuild Available Locations option is selected from the utility menu.

**Dynamic Allocation** – DHS Worldwide, converted data and location designations were included in the conversion, this utility must be run after final conversion. An Error Log will be generated, ignore the errors.

![Rebuild Available Locations Screen](image)

This screen contains three tabs: **Layout Entries**, **Error Log** and **Available Location File**. To view a different window, click on the window ‘tab’ with the mouse.

- **Layout Entries** This window lists Available Location records recently modified using Facility Layout Maintenance. These records will be verified in the Available Locations file if you choose to Rebuild the file.

- **Error Log** **Fixed Allocation Only** – As Total Recall recreates the available locations file, it will record any errors encountered, and store that information in an error log. Each time the available locations file is rebuilt, the error log is cleared.
**Available Location File**

- **Fixed Allocation Only** – This window lists all valid Location addresses in the Facility Layout file along with information about the status of each Location.

**Rebuild**

To recreate the Available Locations file, select the `<Rebuild>` button. The warning screen below will display to remind the user that exclusive use is required for this function. If the message: ‘File Accessed Is Denied’ displays, when the `<Rebuild>` button is clicked, a user other than the user attempting to perform the Rebuild is logged into Total Recall.

**Rebuilt Available Locations Screen**

![Rebuild Available Locations Screen](image)

Click on the `<Continue>` button to proceed with the File Rebuild. The Available Locations file will Rebuild and generate an Error Log if any errors are encountered. To cancel the process and return to the Main Menu, click on the `<Cancel>` button.

Total Recall will display a progress screen similar to the one displayed on Fig. 9.7 to keep the user informed of the progress as the Locations are Rebuilt.

**Rebuild Progress Screen**

![Rebuilding Available Locations Screen](image)

The initial screen is redisplayed when the rebuild is complete. If errors are encountered, the field just under the screen caption will display the message: ‘Processing Complete - Errors Found See Error Log’. If no errors were encountered this message will read: ‘Processing Complete - Error Free’. Click on the Error Log ‘tab’ to view the errors encountered, if any, while rebuilding locations.

To View the status of all Locations, click on the Available Locations ‘tab’. Fig. 9.8 shows an example of this screen.
Fig 9.8

The window on the previous page lists all valid location addresses in the facility layout file along with other pertinent information detailed below.

**Location** This column identifies the unique location for storage of a container.

**Start** This column identifies the beginning location entered in the facility layout screen when this location was created.

**End** This column identifies the ending location entered in the facility layout screen when the location was created.

**Eligible** This column identifies whether or not (“Y” or “N”) this specific location is eligible for storage of a container. This information was entered on the facility layout screen when the location was created.

**Code** The code column indicates what storage code has been assigned for the specific location. If the location was entered as ‘Mixed Storage Area’, this column will be blank.

**Cust.** The customer column identifies the customer number that the specific location was created for, if the location is not customer specific, this column will be blank.

**Used Fixed Allocation Only** – It there is a container stored in the specified location, the column labeled used will have a value of “T” for True; if the location is empty, the value listed in this column will be “F” for False. The false value here along with a “Y” in eligible for use determines the available locations.
Customer ID Conversion

This utility allows a user to change a customer’s number to a new customer number along with the inventory for the customer. The user also has the option to convert the history files and/or the invoice payment files. This process does not require exclusive use although if other users are in logged into Total Recall when this process is begun users may notice a decrease in performance. Depending on the size of your database tables, the speed of your computer and the network being used, this utility can take several minutes to many hours to complete. This may be a feature that a user will initiate at the end of the day to run overnight from the server. The screen below displays when this option is selected from the utility menu.

**Change Customer ID Screen**

![Change Customer ID Screen](image)

**Old Cust #** Enter the existing customer number to be changed in the `<Old Cust #>` field. If the customer number in unknown, click on the down arrow to the right of this field to view a listing of all customers currently entered into Total Recall. Select the customer number and double click with the mouse. The customer number to be changed should display in the `<Old Cust #>` field.

**New Cust #** Enter the new customer number that the existing customer number is to be changed to into this field. *Note: If you are merging two accounts together, enter an existing customer # in the `<New Cust #>` field.*

**Convert History Files** If all the customers’ history files are to be converted to the new customer number, leave this box selected. If the history files are to be left with the original customer number, deselect this box.
Convert Invoice & Payment Files

If all of the customers’ invoice and payment files are to be converted to the new customer number the ‘Convert Invoice and Payment Files’ box should be checked, to leave the history and payment files with the original customer number, deselect this checkbox.

Enter the existing customer number into the <Old Cust #> field. Enter the new customer number into the specified field. Select whether or not to convert the history and payment files and then click on the <Modify> button.

Modify Customer Number

Total Recall will search the database tables and change instances of the old customer number to the new customer number. Upon completion, Total Recall will prompt the user: “Change Complete for Customer Number xxxxxxx”. Click <OK>.

Merge Customer Numbers

If two customer accounts are being merged, enter the customer number to be associated with the newly merged account in the <Old Cust #> field. Enter the customer number to be changed in the <New Cust #> field. Select whether or not to convert history and payment files. Click the <Modify> button, a prompt will display advising user: ‘Cust # Already exists! Do you wish to combine customer files?’ click <Yes> to proceed with merge, click <No> to cancel the process and leave the customers separate.
Department ID by Customer Conversion

This utility changes department numbers within a customer, along with the inventory for the department. This function does NOT require exclusive use of Total Recall, but other users may see performance decrease when this utility is initiated. Depending on the size of your database tables, the speed of your computer and the network being used, this utility can take several minutes to many hours to complete. Fig. 9.10 displays when this option is selected from the Utility menu.

Change Dept. Screen

Fig. 9.10

Customer Enter the Customer Number into this field. Enter the number into the ‘Customer’ field or click to activate the Locate Customer screen.

Old Department Enter the old department number or click on the down arrow to the right of the field to view a listing of current departments. Highlight and double click to select the department to be changed.

New Department Enter the new department number in this field. If two departments are to be merged, enter the department to be merged into the existing department in this field. Note: Prior to merging, the new department must be added to the department listing for the customer.

Convert Department Enter the Customer Number into the ‘Customer’ field and the Old Department into the specified field. Enter a New Department Number in the ‘New Department’ field. Click on the <Start> button. If Two Departments are being merged, Total Recall will prompt the user: ‘Department xxxxx already exists! Do you wish to merge nnnnn with xxxxx?’ Click <Yes> to merge the Departments, click <No> to discontinue this activity.

Total Recall will search the Database Tables and change instances of the Old Department Number to the New Department Number. Upon completion, Total Recall will prompt the user: ‘Processing Complete, nnn Records Updated’. Click <OK> and the Main Menu will display.
Shelf Labels

This utility option will allow the user to print shelf labels for the record center. Shelf labels can also be printed from the Maintenance Menu – Facility Layout, and is the preferred method as it builds the Facility Layout table allowing for Facility Layout Capacity reports to be printed. Fig. 9.11 is displayed when the Shelf Labels option is selected from the Utility Menu.

From this screen, the user will enter a Beginning and Ending Shelf Location Numbers. To use a page of Labels that has some of the first Labels missing from a sheet from a previous print job, count the number of Labels missing and enter that number into the ‘Number of Labels to Skip’ field. The Labels will automatically begin printing on the first available Label and will print full pages thereafter.

The user will normally select to print Standard Labels unless special Shelf Labels have been designed for the Record Center. In that case the user will print either the R & R Label format or the Custom Label format. These settings can be set as the default setting in the report default screen. Note: See Chapter 10, System, Report Defaults for information on setting Report Defaults.

Labels can be Previewed on the screen by clicking the Preview checkbox and then clicking on the <Print> button. To send Labels directly to the Printer, click on the Printer checkbox and then click the <Print> button. A secondary Print screen will display allowing the user to select a Printer.
Export Customer Information

This option allows the user to Export Total Recall Customer Data into QuickBooks™ for Windows® version 4.0. If new customers were added during the month, this option allows the user to update Customer Information in QuickBooks for Windows® version 4.0. Fig. 9.12 will display when this option is selected from the Utility menu.

Fig. 9.12

From this screen, click on the <Export> button. This will create a file in the Total Recall™ directory titled: CUSTOUT.IIF. This file can then be imported into QuickBooks™.

Refer to your documentation from QuickBooks™ for information on importing this Customer File into QuickBooks™ for Windows®.
**Print Container/File Labels**

The user can select whether to print Container or File Labels from this option. From the Container or File Submenus, the user will select to Preprint Labels, Print Labels for Open Work Orders or Reprint Labels. Fig 9.13 displays the Menu options available.

**Print Label Options**

Total Recall allows the user to preprint both container and indexed item labels. These labels can then be given to the customers for them to place on their container and indexed items prior to sending to the record center. This option allows you to preprint generic labels Not associated with a customer, these generic labels must be pre-assigned prior to the containers being scanned into inventory. *Note: To preprint labels assigned to a specific customer, see Chapter 5 – Maintenance Menu – Customer Labels.*

When the user elects to preprint generic labels the screen on Fig 9.14 will display asking the user to specify the number of Labels to be printed. Enter the number of Labels to be Printed and click the <OK> button.

**Specify # of Labels Screen**
Total Recall will automatically display the next sequential container number or indexed item number in the ‘Starting Container/File #’ field and the ‘Ending Container/File #’ field.

To use a page of labels that has some of the first labels missing from a sheet from a previous print job, count the number of labels missing and enter that number into the ‘Number of Labels to Skip’ field. The labels will automatically begin printing on the first available label and will print full pages thereafter.

Labels can be previewed on the screen by clicking the <Preview> button and then clicking on the <Print> button. To print labels, click on the <Printer> button and then on the <Print> button. A secondary print screen will display allowing the user to select a printer.

This option allows the user to Print Container Labels or Indexed Item Labels from a range of Open Work Orders. A Print Labels screen similar to the one below displays when the user has elected to Print Labels for Open Work Orders. Fig. 9.16 displays the screen for Container Labels for Open Work Orders.
The user can enter a range of work order numbers on this screen that contain container or indexed item labels to be printed. Unless special labels have been created for your record center, the user would select to print bar code labels. Click on the Preview radio button to preview the labels on the screen or click on the Printer radio button to send the labels directly to the printer, and click on <OK> to initiate the print. Labels will print for all containers or indexed item labels on open work orders between the ranges indicated where the Print Label Flag has been set to ‘Yes’.

Reprint Labels  On occasion a user may have a need to reprint a container or an indexed item label. This option allows the user to print these labels by either the Total Recall Container/Item Number or by the Location/Effective Date. Fig. 9.17 and 9.18 display the two reprint label options.

Reprint Label Option Screens

By Total Recall Number  By Location / Effective Date

Select the Parameters for which you want to print your labels and select to either preview the labels on the screen or send the labels to the printer.
Convert ASCII File to Work Order

Four options are available under the Convert ASCII Files to Work Order option allowing for a user to import a fixed length ASCII file adding new containers or indexed items directly to a work order. These options are detailed on the following pages.

Import ASCII File

The Import ASCII File feature allows for users to import containers or indexed items in containers from an ASCII file to a work order. Fig. 9.19 displays when this option is selected.

Customer
Enter the Customer Number associated with the ASCII File to be Imported. For a listing of Customers, click on the downward arrow key to the right of the field, highlight and double click to select the Customer.

Import Type
Click the Type of records to be Imported, either ‘Containers’ or ‘Items in Container’.
Setup Code  This field refers to the initial input of either the container or indexed item, and the charges associated with this one time charge. Click on the down arrow key to the right of this field to view the available setup code choices. This is a Walk-A-Long field for easy entry. The choices that appear here are those that were set up on the Master or Customer Service Code screens as a Category Code ‘3’, if you are importing containers, or as a Category Code ‘D’ if indexed items are to be imported. To select a code, the user may simply enter a valid code or click on the drop down arrow, highlight the setup code and double click with the mouse. *Note: Refer to Chapter 5 - Maintenance Menu - ‘Master or Customer Service Codes’ to add additional setup codes to your master service codes or customer service code listings.*

Storage Code  This field refers to the monthly storage to be associated with the container or indexed item. The choices that appear here are those that were set up as a Category Code ‘4’ on the Master or Customer Service Code screens. Click on the down arrow to the right of the storage code field to view the listing of available Monthly Storage Codes. This is a Walk-A-Long field for easy entry. From the drop down menu, the user can highlight a storage code and double click with the mouse or simply type the Storage Code. *Note: Refer to Chapter 5 - Maintenance Menu - ‘Master or Customer Service Codes’ to Add additional Monthly Storage Codes to the Master or Customer Service Code listings.*

Each field that has information to be imported on the ASCII File must be identified with a Starting Position and a Field Length. The center section of this screen allows the user to select which fields are to be imported and enter a Starting Position Number and a Field Length for each Field. The fields and buttons in the lower portion of the screen are detailed below.

Get Line  Once a file has been identified, click on the <Get Line> button to display the first line of the file in the field to the right of this button. Once the first line is displayed, this button will change to read <Next Line>. Use this button to scroll through the lines of the file.

Number of Lines to Skip  If there are blank lines or other miscellaneous lines at the beginning of this file, enter into this field the number of lines to be skipped before the import is to begin.

Name of File to Import  This field will display the path and the name of the file to be imported. If the user knows this information, it can be entered in this field. Otherwise, the user can use the <Find File> button to navigate to the file to be imported.
Find File
Click on this button to locate the file to be imported. The ‘Open’ dialog box will display, select the drive, directory and filename to be imported. Double click the file or highlight the file, and click on the <Open> button. Note: If the file is located on a floppy diskette, copy the file to the hard drive for quicker import time.

Current Line #
This field will display the current line number of the line displayed to the left of this field.

Determining Starting Positions & Field Lengths
Once the file has been opened and a line is displayed in the line field, place the cursor in the left most position of the line field, this is position ‘1’. Note: With the cursor in the displayed line field using the [HOME] key on the keyboard, will automatically take the user to the first position of this field. If there is data in this first position, determine the length of the field by using your right arrow key and counting the number of characters to where the next field begins. This count then becomes the ‘Length’ of the field. Determine which Total Recall field this data is to be entered into, go to that field in the middle portion of the screen and enter the starting position number as ‘1’ and the length at whatever length was determined when counting the characters.

Using the left arrow key and counting the number of characters beginning in position ‘1’ each time, determine the starting position and the length of each additional field to be brought into Total Recall. Enter this information in the middle portion of the screen. To check for accuracy, click on the <Next Line> button, and the information will fill into the fields. Make any necessary adjustments, and check by clicking the <Next Line> button to view alignment of additional lines.

Once you are comfortable that all fields are accurately defined with both the starting position number and the field length, click on the <Save> button. The <Import> button then becomes enabled. Click on the <Import> button to begin the Import. The data will be imported, and a Work Order will be created. Note: The maximum number of lines that can be added to a work order is 9,999. If the import has more records than this, additional work orders will be created. When large amounts of data is imported into Total Recall, it may take some time, especially if the data has to be split into more than one work order, please be patient!

When the data has been imported, a dialog box will display the following message: ‘Processing Complete. . . . Work Order nnnnnn was created! NN Exceptions were noted’ The user will then be prompted to delete the import File. If the file is no longer needed or the file has been backed up in a separated directory, delete this File. Do Not Delete the file if it will be needed for future use.
Exit the import screen, and from the File Menu – Edit Work Order – Browse List of Records. A work order(s) with a work order description of ‘Import from ASCII File’ should display from the list. Open the work order and make any modifications to the lines as necessary. When complete close the work order to send the data to inventory.

**Tape Rotation Service**

The Tape Rotation Services option has two submenu options: Standard Tape Rotation and Tape Management. These options will be detailed below and on the following pages.

**Standard Tape Rotation**

The Tape Rotation feature allows the user to Import a Fixed Length ASCII file to a Work Order to submit the Customers’ Tape Rotation Pulls and New Adds. Fig 9.20 displays when this option is selected and the <Add> button is engaged. The following details the fields and their uses.

**Import ASCII File Screen**

![Import Tape Rotation ASCII File Into Work Orders](image)

**Cust ID**  Enter the Customer Number associated with the Fixed Length ASCII file to be imported. For a listing of Customers, click on the downward arrow key to the right of the field, highlight and double click to select the customer.

**Department**  If this import is for a specified department, enter the department here. For a listing of departments, click on the downward arrow key to the right of the field, highlight and double click to select the Department.
WO Storage Service Cd  This field refers to the monthly storage associated with the tape. The choices that appear here are those that were set up as a Category Code ‘4’ on the Master or Customer Service Code screens. Click on the down arrow to the right of the storage code field to view the listing of available monthly storage codes. From the drop down menu, the user can highlight a Storage code and double click with the mouse or type the storage code in the field, this is a Walk-A-Long field for easy entry. *Note: Refer to Chapter 5 - Maintenance Menu - ‘Master or Customer Service Codes’ to Add additional Monthly Storage Codes to the Master or Customer Service Code listings.*

WO Storage Service Cd  This field refers to the initial input of the tape and the charges associated with this one time add charge. Click on the down arrow key to the right of this field to view the available setup code choices. The choices that appear here are those that were set up as a Category Code ‘3’, on the Master or Customer Service Code screens during setup. To select a code, the user may simply enter a valid code this field is a Walk-A-Long field or click on the drop down arrow, highlight the Setup Code and double click with the mouse so the Setup Code appears in the field. *Note: Refer to Chapter 5 - Maintenance Menu - ‘Master or Customer Service Codes’ to Add additional Setup Codes to your Master Service Codes or Customer Service Code listings.*

WO Removal Service Cd  This field refers to the permanent removal of a container and the charges associated with this activity. Click on the down arrow key to the right of this field to view the available Setup Code choices. The choices that appear here are those that were set up as a Category Code ‘2’, on the Master or Customer Service Code screens. To select a code, the user may simply enter a valid code, this is a Walk-A-Long field or click on the drop down arrow, highlight the Removal Code and double click with the mouse so that the Removal Code displays in the field. *Note: Refer to Chapter 5 - Maintenance Menu - ‘Master or Customer Service Codes’ to Add additional Removal Codes to your Master Service Codes or Customer Service Code listings.*

Keywords  In the field to the right of Work Order Setup Code, the user will indicate the keyword that will indicate an ‘Add’. In the field to the right of Work Order Removal Service Code, the user will need to indicate the keyword used to indicate a ‘Permanent Removal’. There is also a field to indicate the keyword for ‘Reconcile’ and ‘Disaster Recovery’. *Note: The Keyword can be a Word, a Letter or a Number designating the Activity to be performed*

Import?  Check this box if the Service listed to the right is to have a Work Order Line created for each record with this Keyword.
Disaster Recovery

Check this box ONLY if this is a Disaster Recovery Test or an actual Disaster.

Each field that has information to be imported on the ASCII file must be identified with a Starting Position and a Field Length. The center section of this screen allows the user to select which fields are to be Imported and enter a Starting Position Number and a Field Length for each Field. A File must first be located and a line displayed to assist in determining the Starting Positions and Field Lengths.

Name of File to Import

This field will display the path and the name of the file to be imported. If the user knows this information, it can be entered in this field. Otherwise, when the file can be located through the Find File feature, the path and file name will display in this field.

# Of Lines to Skip

If there are blank lines or other miscellaneous lines at the beginning of this file, enter into this field the number of lines to be Skipped before the Import is to begin.

Current Line #

This field will display the Current Line Number of the Line displayed to the left of this field.

Find File

Click on this button to locate the file to be imported. The ‘Open’ dialog box will display, select the drive, directory and filename to be imported, double click the file or highlight the file, and click on the <Open> button. Note: If the file is located on a floppy diskette, copy the file to the hard drive for quicker import time.

Get Line

Once a File has been identified, click on this button to display the First Line of the File. Once the first line is displayed, this button will change to read <Next Line>. Use this button to scroll through the lines of the file.

Determining Starting Positions & Field Lengths

Once the file has been opened and a line is displayed in the line field, place the cursor in the left most position of the line field, this is position ‘1’. Note: With the cursor in the displayed line field using the [HOME] key on the keyboard, will automatically take the user to the first position of this field. If there is data in this first position, determine the length of the field by using your right arrow key and counting the number of characters to where the next field begins. This count then becomes the ‘Length’ of the Field. Determine which Total Recall field this data is to be entered into, go to that field in the middle portion of the screen, and enter the Starting Position number as ‘1’ and the length at whatever length was determined when counting the characters.
Using the left arrow key and counting the number of characters, beginning in position ‘1’ each time, determine the Starting Position and the Length of each additional field to be brought into Total Recall. Enter this information in the middle portion of the screen. To check for accuracy, click on the <Next Line> button, and the information will fill into the fields. Make any necessary adjustments and check by clicking the <Next Line> button to view alignment of additional lines.

Note: Be sure to indicate your ‘Keyword’ Starting Position and Length in the top portion of the screen.

Once you are comfortable that all fields are accurately defined with both the Starting Position number and the Field Length, click on the <Save> button. The <Import> button then becomes enabled. Click on the <Import> button to begin the Import. The data will be imported, and a Work Order will be created. Note: The maximum number of lines that can be added to a Work Order is 9,999. If the import has more records than this, additional Work Orders will be created. When large amounts of data are Imported into Total Recall™, it may take some time, especially if the data has to be split into more than one Work Order, please be Patient!

When the data has been imported, a dialog box will display the following message: ‘Processing Complete. . . . Work Order nnnnnn was created! NN Exceptions were noted’ The user will then be prompted to Delete the Import File. If the File is no longer needed or the File has been backed up in a separated directory, Delete this File. Do Not Delete the File if it will be needed for future use.

Exit the Import screen and from the File Menu select - Edit Work Order - Browse List of Records. A Work Order(s) with a Work Order Description of ‘Import Tape Rotation File’ should display in list. Open the Work Order and make any modifications to the lines as necessary. The Work Order is now ready for processing.

**Tape Management Services**

The Tape Management Import feature allows the user to import a Fixed Length ASCII file to a work order to submit tape rotation pulls and new adds expected to be in inventory. Work Orders will be created to add new tapes into inventory and to pull tapes not listed in the file provided by the customer. Fig 9.21 is displayed when this option is selected and the <Add> button has been engaged.
Tape Management Import Screen

![Import ASCII File]

**Fig. 9.21**

**Import Description**
Enter a Description of the Import File into this field.

**Customer**
Select the customer associated with the ASCII File to be imported. To display a list of customers, click on the down arrow key to the right of this field. Enter the customer number, this is a Walk-A-Long field for easy entry or highlight and double click to select a customer.

**Setup Code**
This field refers to the Initial Input of the Container and the charges associated with this one time charge. Click on the down arrow key to the right of this field to view the available Setup Code choices. The choices that appear here are those that were set up as a Category Code ‘3’ on the Master or Customer Service Code screens during setup. To select a code, the user may simply enter a valid code, this is a Walk-A-Long field for easy entry. The user can also highlight the Setup Code and double click with the mouse. *Note: Refer to Chapter 5 - Maintenance Menu - Master/Customer Service Codes to add additional Setup Codes to your Master/Customer Service Code listings.*

**Storage Code**
This field refers to the monthly storage associated with the container. The choices that appear here are those that were set up as a Category Code ‘4’ on the Master or Customer Service Code screens. Click on the down arrow to the right of the storage code field to view the listing of available monthly storage codes. From the drop down menu, the user can highlight a storage code and double click it with the mouse or simply type the storage code. *Note: Refer to Chapter 5 - Maintenance Menu - ‘Master or Customer Service Codes’ to Add additional Monthly Storage Codes to the Service Code listings.*
Removal Code  This field refers to the permanent removal of a container and the charges associated with this activity. Click on the down arrow key to the right of this field to view the available setup code choices. The choices that appear here are those that were set up as a Category Code ‘2’, on the Master or Customer Service Code screens. To select a code, enter a valid code or click on the drop down arrow, highlight the Removal Code and double click with the mouse.  

Note: Refer to Chapter 5 - Maintenance Menu - ‘Master or Customer Service Codes’ to Add additional Removal Codes to your Master Service Codes or Customer Service Code listings.

Key field Option  Reference Field Captions (1-9) will display for customer selected beside the buttons.

Update Inventory  Check this box to update current inventory found in the text file.

Each field that has information to be Imported on the ASCII File must be identified with a Starting Position and a Field Length. The center section of this screen allows the user to select which Fields are to be Imported and enter a Starting Position Number and a Field Length for each Field. A File must first be located and a line displayed to assist in determining the Starting Positions and Field Lengths

Name of File to Import  This field will display the Path and the Name of the File to be Imported. If the user knows this information, they can enter it in this Field, otherwise when the File is located through the Find File Feature, the Path and File Name will display in this Field.

# Of Lines to Skip  If there are blank lines or miscellaneous lines at the beginning of this File, enter into this field the Number of lines to be Skipped before the Import is to begin.

Current Line #  This field will display the Current Line Number of the line displayed to the left of this field.

Find File  Click on this button to locate the file to be imported. The ‘Open’ dialog box will display, select the drive, directory and filename to be imported, double click the file or highlight the file, and click on the <Open> button.  

Note: If the File is located on a floppy diskette, copy the File to the hard drive for quicker Import time.

Get Line  Once a file has been identified, click on this button to display the first line of the file to the right of the <Get Line> button. Once the first line is displayed, this button will change to read <Next Line>. Use this button to scroll through the lines of the file.
Determining Starting Positions & Field Lengths

Once the file has been opened and a line is displayed in the line field, place the cursor in the left most position of the line field, this is position ‘1’. Note: With the cursor in the displayed line field using the [HOME] key on the keyboard, will automatically take the user to the first position of this field. If there is data in this first position, determine the length of the field by using your right arrow key and counting the number of characters to where the next field begins. This count then becomes the ‘Length’ of the field. Determine which Total Recall field this data is to be entered into, go to that field in the middle portion of the screen, and enter the Starting Position number as ‘1’ and the length at whatever length was determined when counting the characters.

Using the left arrow key and counting the number of characters, beginning in position ‘1’ each time, determine the Starting Position and the Length of each additional field to be brought into Total Recall. Enter this information in the middle portion of the screen. To check for accuracy, click on the <Next Line> button, and the information will fill into the fields. Make any necessary adjustments and check by clicking the <Next Line> button to view alignment of additional lines.

Once you are comfortable that all fields are accurately defined with both the Starting Position number and the Field Length, click on the <Save> button. The <Import> button then becomes enabled. Click on the <Import> button to begin the Import. The data will be imported, and a Work Order will be created. Note: The maximum number of lines that can be added to a Work Order is 9,999. If the import has more records than this, additional Work Orders will be created. When large amounts of data are Imported into Total Recall™, it may take some time, especially if the data has to be split into more than one Work Order, please be Patient!

Exit the Import screen and from the File Menu select - Edit Work Order – Browse List of Records. Scroll down through the list towards the bottom there should be a work order(s) with a work order description of ‘Import Tape Rotation File’. Open the work order and make any modifications to the lines as necessary. When complete close the work order to send the data to inventory.
Fiche File Import

The Fiche File Import ASCII File Into Work Orders feature allows the user to import a Fixed Length ASCII Fiche file to a work order to submit Fiche files. The screen below displays when this option is selected.

**Fiche Management Screen**

![Fig. 9.22](image)

**Customer #**  Select the Customer associated with the Fixed Length ASCII File to be Imported. To display a list of Customers, click on the down arrow key to the right of this field. Highlight and double click to select a customer or enter in the customer number.

**Container Setup Service Code**  This field refers to the Initial Input of either the Container or Indexed Item, and the charges associated with this one time charge. Click on the down arrow key to the right of this field to view the available Setup Code choices. The choices that appear here are those that were set up as a Category Code ‘3’, on the Master or Customer Service Code screens during setup. To select a code, the user may enter a valid code or click on the drop down arrow, highlight the Setup Code and double click with the mouse. **Note: Refer to Chapter 5 - Maintenance Menu - 'Master or Customer Service Codes’ to add additional Setup Codes to the Service Code listings.**

**Description**  Enter a description of the Fixed Length ASCII Fiche file to be imported.
Container Storage Code

This field refers to the Monthly Storage associated with the container. The choices that appear here are those that were set up as a Category Code ‘4’ on the Master or Customer Service Code screens. Click on the down arrow to the right of the storage code field to view the listing of available Monthly Storage Codes. From the drop down menu, the user can highlight a storage code and double click with the mouse or enter the storage code. Note: Refer to Chapter 5 - Maintenance Menu - ‘Master or Customer Service Codes’ to Add additional Monthly Storage Codes to the Service Code listings.

Fiche Setup Code

This field refers to the Initial Input of Indexed Item, and the charges associated with this one time charge. Click on the down arrow key to the right of this field to view the available Setup Code choices. The choices that appear here are those that were set up as a Category Code ‘D’ on the Master or Customer Service Code screens during setup. To select a code, the user may enter a valid Code, this is a Walk-A-Long field or click on the drop down arrow, highlight the Setup Code and double click with the mouse. Note: Refer to Chapter 5 - Maintenance Menu - ‘Master or Customer Service Codes’ to Add additional Setup Codes to the Service Code listings.

Fiche Storage Code

This field refers to the Monthly Storage associated with the indexed item. The choices that appear here are those that were setup as a Category Code ‘4’ on the Master or Customer Service Code screens. Click on the down arrow to the right of the storage code field to view the listing of available monthly storage codes. From the drop down menu, the user can highlight a storage code and double click with the mouse or enter the storage code using the Walk-A-Long feature. Note: Refer to Chapter 5 - Maintenance Menu - ‘Master or Customer Service Codes’ to Add additional Monthly Storage Codes to the Master or Customer Service Code listings.

Max # of Fiche/Box

Enter the maximum number of Fiche to be placed in a container.

Auto Assign Location

Indicate here if Total Recall is to Auto Assign the location.

Each field that has information to be imported on the ASCII file must be identified with a Starting Position and a Field Length. The center section of this screen allows the user to select which fields are to be imported and enter a Starting position number and a Field Length for each field. A file must first be located and a line displayed to assist in determining the Starting Positions and Field Lengths.
Name of File to Import: This field will display the path and the name of the file to be imported. If the user knows this information it can be entered in this field, otherwise when the file is located through the Find File feature, the path and file name will display in this field.

# Of Lines to Skip: If there are blank lines or miscellaneous lines at the beginning of this file, enter into this field the number of lines to be skipped before the import is to begin.

Current Line #: This field will display the current line number of the line displayed to the left of this field.

Find File: Click on this button to locate the file to be imported. The ‘Open’ dialog box will display, select the drive, directory and filename to be imported, double click the file or highlight the file, and click on the <Open> button. Note: If the file is located on a floppy diskette, copy the file to the hard drive for quicker import time.

Get Line: Once a file has been identified, click on his button to display he first line of the file to the right of his button. Once the first line is displayed, this button will change to read <Next Line>. Use this button to click through the lines of the file.

Determining Starting Positions & Field Lengths: Once the file has been opened and a line is displayed in the line field, place the cursor in the left most position of the line field, this is position ‘1’. Note: With the cursor in the displayed line field using the [HOME] key on the keyboard, will automatically take the user to the first position of this field. If there is data in this first position, determine the length of the field by using your right arrow key and counting the number of characters to where the next field begins. This count then becomes the ‘Length’ of the Field. Determine which Total Recall field this data is to be entered into, go to that field in the middle portion of the screen, and enter the Starting Position number as ‘1’ and the length at whatever length was determined when counting the characters.

Using the left arrow key and counting the number of Characters, beginning in position ‘1’ each time, determine the Starting Position and the Length of each additional field to be brought into Total Recall™. Enter this information in the middle portion of the screen. To check for accuracy, click on the <Next Line> button, and the information will fill into the fields. Make any necessary adjustments and check by clicking the <Next Line> button to view alignment of additional lines.
Once you are comfortable that all fields are accurately defined with both the Starting Position number and the Field Length, click on the <Save> button. The <Import> button then becomes enabled. Click on the <Import> button to begin the Import. The data will be imported, and a work order will be created. Note: The maximum number of lines that can be added to a Work Order is 9,999. If the import has more records than this, additional Work Orders will be created. When large amounts of data are Imported into Total Recall™, it may take some time, especially if the data has to be split into more than one Work Order, please be Patient!

Exit the import screen and from the File Menu – Edit Work Order – Browse List of Records. Scroll down through the list towards the bottom there should be a work order(s) with a work order description of ‘Import Tape Rotation File’. Open the work order and make any modifications to the lines as necessary. When complete close the work order to send the data to inventory.
Convert Items

Two options are available under this menu: Convert an Indexed Item to a Container or Convert a Container to an Indexed Item.

Convert Indexed Item to Container

The Convert an Indexed Item to a Container is a function created exclusively for Fixed Allocation Only. This feature allows an indexed item to be converted to a container. Fig. 9.23 displays when this option is selected. Enter a Total Recall item number into the <TR Item Id> field. This will bring up information from the record. Enter the location where the newly converted item is to be stored as a container in the <New Location> field. Click the <Save> button to convert the item. When the change is done a message will display: ‘Move Complete’. Click <OK> to continue with additional items. Upon Completion, Click <Exit>.

Convert Indexed Item Screen

Fig 9.23

TR Item ID  Enter the Total Recall Item number for the indexed item to be converted to a container.

Location  After the TR item number has been entered, the location of the container, where the indexed item is currently stored, will display in this field.

New Location  Enter the New Location where this converted item will be stored as a container.

Customer  After the Total Recall item number has been entered, this field will display the customer number that is associated with this item in inventory.
Indexed Item ID

After the Total Recall item number has been entered this field will display the unique item ID from inventory.

Retrieved

This field will be checked if the indexed item is currently in a retrieved status.

Item ID Desc

This field will display the item description, if any, from the original record in inventory. This description will become the container description when the item is converted.

Convert Container to Indexed Item

This feature allows for a container to be converted to an indexed item and placed into a container. Fig. 9.24 displays when this option is selected.

A Keyboard Wedge works well with this function. Enter all fields, except the Current Container Number, scan the container with a Keyboard Wedge or enter the container number, with the ‘Auto Save’ feature selected, continue scanning or entering the containers until the container has been filled. Change the New Container Number and any other information that may change and continue scanning with the Keyboard Wedge or entering container numbers manually. The table below and on the following page details the fields on this screen.

New Container #

Enter the Total Recall container number where these files are going to be placed. Click the binoculars button to locate the new container number, if it is not known. This can also be entered through the keyboard wedge if new container # has been bar coded.
Current Container #

Enter the current Total Recall container number that is to be converted. Click the binoculars button to locate the container if the Total Recall container number is not known. If a keyboard wedge is being used to input data, click on the <Auto Save> button, which will activate a <Save> after each scan.

New TR Indexed Item #

Enter a new Total Recall indexed item number to be associated with this container that is being converted to an indexed item. To have the Total Recall item number automatically assign the next sequential Total Recall item number, click the ‘Auto Assign’ check box.

Copy TR Container to Reference Field Displayed Specified Below

Copy Reference Information

If the reference information contained within the container record is to be copied to the newly created indexed item record, indicate this by clicking the field that is to be duplicated.

Create WO Removing Container

If a work order is to be created that permanently removes the container record from the active database and places it in the permanent removal database, check this option.

Current WO #

If the ‘Create WO Removing Container’ has been selected, the work order created will automatically display in this field.

Permanent Removal Cd

If the ‘Create WO Removing Container’ has been selected, indicate the permanent removal code to be used for this function.

Indexed Item Add Cd

Indicate the code to be used to add the indexed item to Total Recall. The codes that display here are those entered with a Category Code of a ‘D’ in the Master Service Codes or Customer Service Codes Listing.

Note: Refer to Chapter 5 – Maintenance Menu – ‘Master or Customer Service Codes’ to Add additional Codes for Add New File Item Codes.

Information About Container Being Converted

Cust #

Displays the Customer Number from inventory.

Ref 1 ID #

Displays the information found in the Reference 1 field of the current Container in inventory.

Desc

Displays the information found in the Description field.

Retrieved

This checkbox will display with a checkmark if the Container being Converted is currently Retrieved. If no checkmark appears, the Container is Not Retrieved.
Calculate Container Retrievals

This feature calculates the number of times a container or an item within a container has been retrieved. Once this utility has been run, this information is stored in the container and indexed item record. This utility is run after a month end processing has been completed. Current period activity will not be included in account. Fig 9.25 displays when this option is selected.

Click the <Set> button to initiate the count process. The progress line will change colors and show the percentage complete. The Main Menu will display upon completion. These statistics are then housed in the container and indexed item records in a field labeled ‘Access Count’.

The statistics can be viewed or printed as a report or viewed on screen from the Operations Menu - Container Retrieval Statistics. Version ‘A’ will display the containers that have been retrieved at least once, and the number of indexed items that have been retrieved from that container. If the container has never been retrieved, but files within the container have, this container will be listed with the associated numbers. Version ‘B’ displays or prints the containers that have never been retrieved.
Verify Indexed Items Locations

This feature verifies that all indexed items are in the proper location as driven by the location of the container where it currently resides. Fig. 9.26 displays when this option is selected.

Click on the <Start> button to begin the verification process. A progress bar will display as the verification is processing. Upon completion a message screen will display notating the total number of locations fixed, number of removals fixed and number of no finds. Click <OK> to exit this status report and return to the Main Menu.
**Media Verification**

The Media Verification Module allows the user to import a Fixed Length ASCII File from a customer into Total Recall and verify against tape pulls or returns. A Keyboard Wedge makes this process very quick, although data can be entered through the computer keyboard. Fig 9.27 displays the Media Verification screen in the Add mode.

![Verify Media Screen](fig9.27)

After a File has been imported, the tapes are data entered or the Keyboard Wedge is used to enter the tape pulls or returns. After all tapes are entered, the import results will display indicating which tapes have been verified.

- **Import ID**  This is an identification number that is assigned by the user to track the media import number.

- **Description**  Enter a brief description of information contained on the media tapes of the data being imported as a Fixed Length ASCII Import file.

- **Starting Position**  Indicate the Starting Position of the barcode number being imported from the Fixed Length ASCII Import File.

- **Length**  This field indicates the number of characters included in the barcode number on the tape.

- **# Of Lines to Skip**  Indicate in this field the number of lines to skip, if any, before beginning the import.

- **ASCII Text File**  This field will display the path name where the file to be imported is located.
**Find File** This button is used to navigate to the path where the import file is located.

**Sample Line** This field will display a sample line of the Fixed Length ASCII Import File.

Once these fields have been entered, click the <Import> button to Import the File that the actual tapes will be Verified against. Click on the Import Results tab. See Fig 9.28.

**Import Results Tab**

With the cursor in the <Find> field begin entering either through the Computer Keyboard or a Keyboard Wedge. As items are scanned, a ‘T’ will display in the Verified Column. Upon completion, click the <Print> button to get total Number of Tapes Verified and any exceptions.

**Verified** A 'T' will appear in the Verified field if a scan matches the Item in the list. It will be blank if the Item was not scanned.

**Scanned ID** This field will display the Barcode Number on the Tape.

**Import Line** This line will contain a Description of the information on the Tape.

**Find** This is the field for Data Entry of the Tape Barcode Number using the Keyboard Wedge or entering from the computer keyboard.

**# Items Found** This field displays the number of Validated entries. This Number should increment with each Scan.

**Print** A report can be printed out which will show the Total Number of Items validated in the Scan File. Any exceptions (Items Not Scanned) will print.
CHAPTER TEN
System Menu
CHAPTER 10
System Menu

Overview

The System Menu allows the user to set System Parameters, add users with access levels, set report defaults, view users currently logged into Total Recall, and verify the data path where the Total Recall program and data files are running.

Select the System Menu option using the mouse or by holding the [ALT] key and pressing the letter [S]. Move through the menu using the arrow keys on the keyboard, or by clicking on any menu option with the mouse. This chapter contains an outline of the menu options followed by a detailed description of each option.

System Menu

Parameters  The Parameters screen allows for the system administrator to customize Total Recall to the needs of the record center. This includes entering the record center’s address and phone numbers, setting up transportation standards, billing parameters, work order defaults, barcode settings, field lengths and default captions that carry over to customer screens as new customers are entered.

Security  This option allows the system administrator to set up the individual users in Total Recall and assign access levels to each user for all menu options. This menu also includes a utility to copy security levels from one user to another user or from a user to a new user.

Report Defaults  The report defaults option allows the user to set version defaults and print preferences for reports within Total Recall.

Users Logged On  This option allows the user to view a list of all users currently logged into Total Recall.

Data Path  Displays the data path where program and data files are stored.
Parameters

The Parameters option allows the systems administrator to customize Total Recall according to the needs of the record center. This menu option is often times the first option accessed when setting up Total Recall. The ‘System Parameters’ screen has four (4) windows or “tabs” which are **Company / Billing**, **Work Order/Space Allocation**, **Bar Code / Field Lengths** and **Default Captions**. To view the different windows, click on the window ‘tab’. The screens contained herein, effect the program on a system-wide basis. Once these settings are set, caution should be taken in changing them as they could affect large amounts of data. *Note: Access to these screens should be very limited.*

To modify the parameters displayed in the current window, click the <Edit> button. Total Recall will open all the edit enabled parameter fields. Use the mouse to click the field to be changed. After modifications have been made, select the <Save> button to save the changes. To restore the parameters, select the <Revert> button, prior to saving your changes. To return to the main menu, click the <Exit> button.

Company / Billing

Fig. 10.2 displays the **Company / Billing** window in edit mode. This is the default window when the parameters option is selected from the system menu. Each field on this screen is detailed in the table immediately following.

**Company / Billing Tab**

**Company Name**  This field displays the name of the company. Please contact DHS Worldwide for any change necessary in this field.
**Company Address**  Enter the company address, city, state, and zip as you wish it to appear on the invoices and work orders.

**Telephone #**  Enter main company phone number including the area code in this field.

**Fax #**  Enter the company Fax number including the area code in this field.

**Date Format**  This field allows the user to select a date format other than MM/DD/YY (Month, Day, Year), for international record centers. If this field is left blank, the default Date format is MM/DD/YY.

**Maintain Current Period Statistics**  With this option invoked statistics will be updated as work orders are closed. These statistics are then updated during the Month End Close process. *Note: This option if selected, may decrease the performance of Total Recall.*

**Next Work Order #**  This field displays the next sequential number to be used by Total Recall when assigning a work order number. This field value will increment automatically by Total Recall as new work orders are added to the program.

**Next TR Con #**  Total Recall automatically assigns the next available number for containers as they are added to the system or pre-print labels are assigned. This number is used for tracking a container throughout the record center. This field value will increment automatically by Total Recall as containers are added to the record center or pre-printed labels are assigned and/or printed.

**Century Break**  This option allows for the user to enter a Century ‘Break’ number. From this number, Total Recall will determine the four-digit year when a two-digit year is entered throughout Total Recall. For example, with the ‘Century Break’ set at ‘50’ any two-digit Year entered as ‘50’ or higher, the system will assume the century as 1900. Any two-digit year entered less than 50, the century is assumed as 2000.

**Next File/Item #**  Total Recall automatically assigns the next available number for indexed items as they are added to the system. This number is used for tracking each indexed item throughout the record center. The field value will increment automatically by Total Recall as items are added to the facility, or pre-printed labels are assigned or printed.

**Next Recurring Work Order**  Total Recall automatically assigns the next available daily recurring work order number as recurring work orders are added to Total Recall. This will increment automatically by one for each recurring work order added to Total Recall.
**Next Query**  This field will increment automatically by one for each query saved in Total Recall.

**Next Customer Security Code**  This field allows for the user to enter a Starting Number for Sequential Security Codes. As Authorized Persons are Added to a Customer file, the user can double click in the ‘Security Code’ field and the next available System Wide Security Code will be assigned to the Authorized Person.

**Next Group ID**  This field allows for the user to enter a Starting Number for Sequential Group Identifiers. As Customers are Added, the user can double click in the ‘Group ID’ field and the next available Group ID will be assigned to the Customer.

**Minimum Transportation Settings**

The Minimum Transportation Settings cannot be set until after service codes have been added to the system. Once minimum transportation settings are established and entered here, these settings will be applied to each customer added to Total Recall thereafter, and can be edited on a customer-by-customer basis.

**Base Service Code**  This is the base transportation code to be automatically applied to each work order created often referred to as the ‘Trip Charge’. This code must be set up in the Master Service Code listing in Total Recall.

**Related Code**  This is an individual work order line charge used for requirement codes 4 through 6 only. Select the transportation code associated with the individual line item, often referred to as the ‘Each Additional’ item charge.

**More Button**  The <More> button displays the screen on Fig. 10.3 and allows the user to determine which type of work order activity lines the related code is to be applied. Use the mouse to select activity lines where the related code is to be applied. This screen is applicable to requirement codes 4 through 6 only.
# Of Deliveries in Base
This is a numeric field for the user to enter the number of qualifying work order lines listed in the <More> button. Once this base is met charges will apply to all additional work order lines. This field is applicable to requirement code 4 through 6 only.

Requirement Codes
This feature in Total Recall allows for transportation charges to be automatically billed according to the requirement code selected. The following table details the requirement code designations.

Codes 1-3
These codes allow the user to set up a minimum transportation code that will compare the total transportation charges on the work order lines to the minimum transportation charge in the work order header and charge the greater of the two amounts. Note: Transportation charges MUST be entered into the transportation field on the work order lines or the minimum will not have anything to compare to and no charges will be accessed.

Code 1 – Minimum transportation code will appear in the work order header and can be changed or deleted.
Code 2 – Minimum transportation code will appear in the work order header but cannot be changed or deleted.

Code 3 – No minimum transportation code will appear in work order header but the field will be available for the user to enter the appropriate code.
**Codes 4-6**  These codes allow the user to bill for transportation automatically. A related transportation code is set up to bill for all deliveries after a specified number has been met. Work order lines are totaled and the delivery fee is automatically charged. No transportation codes are to be added to the work order lines, this will be done automatically dependent on the selections made under the `<More>` button.

**Code 4** – Transportation code will appear in the work order header and can be changed or deleted.

**Code 5** – Transportation code will appear in the work order header but cannot be changed or deleted.

**Code 6** – No minimum transportation code will appear in work order header but the field will be available for the user to enter the appropriate code. *Note: If priorities are used, that are associated with the transportation codes, this field will display the transportation code associated with the priority selected.*

**Code 7** – Allows the user to charge a flat rate transportation fee on all work orders regardless of the number of items. The work order header field is displayed. A transportation code must be entered to be charged, unless the transportation code has been previously associated to the priority selected, in this case the transportation code will automatically display.

**Carry Reference Information**  This option allows the user to indicate which container reference field, if any, to copy to all items indexed within the container. For example, if a customer box number is entered into the ref. 1 field for the container, and this information is to be carried to the reference 9 field of each item indexed within the container, click the button to left of `<1 to 9>`.

**Stringent File Lock**  With this option invoked, Tables will be locked each time an update is made. It is recommended to have this feature checked, to prevent table corruption due to an update made when the table is not locked.
Invoice System Parameters

**Current System Month** This field displays the Current System Month. This month is updated when a full month end process is completed. This represents the cycle month, which will be closed during the next Month End Close.

**$ Symbol** This field is for international record centers that use a symbol other than the dollar symbol - $.

**Next Invoice #** This field displays the next sequential invoice number to be assigned when invoices are created.

**Next Pre-Assigned Label Group** This field is for **Fixed Allocation** only. These number increments by one each time a Container/Location label group is assigned.

**Copy Container Retention** Check this box to automatically copy container retention information to all items indexed within the container. Retention information includes all of the following fields: Record Series, Retention Code, From Date, To Date and Expiration Date.

**Recalculate Cubic Feet** Click this option if cubic footage has been associated with each container in inventory and, as part of the Month End Process, the cubic footage is to re-calculate and update to the Customer Maintenance screen. This option can be invoked regardless of whether or not container billing is by the container or by the cubic foot.

**Create Invoice for each WO** This feature creates an invoice for the work order each time a work order is closed, if billable charges exist on the work order. A Month End Close must still be completed to create storage invoices. If this option is invoked, ALL customers will create invoices for each work order closed. *Note: This billing option is also available on a customer-by-customer basis by selecting this option on the customer maintenance screen under the ‘Billing’ option section.*

**Credit Back Unused Storage for Removals** If this option is selected, credit will be issued back to the customer when containers are permanently removed. This option only credits back for the current billing period. To have the ability to credit back from prior billing periods, select the ‘**Rebate Storage**’ option on the Customer Maintenance screen for the individual customer under the ‘Billing Option’ section. The ‘**Rebate Storage**’ option allows the user to rebate storage for specified customers only.
Show Minimum Period Storage as One Entry

If this option is selected, when actual storage charges do not meet the minimum storage requirement, the invoice will reflect a single line charge with the total dollar amount of the minimum storage. If this option is not selected, and the actual storage charges are less than the minimum, the invoice will display the actual storage charges with an added line displaying the charge to bring the storage to the minimum charge amount.

Use Due Date During Month End Close

During the Month End processing, Total Recall needs to be able to determine which invoices to bill and send to history. To determine this, Total Recall uses either the work order close date or the work order due date as displayed on the work order. To use the close date leave this field un-checked, to use the due date, check this field.

Lock Recall in Exclusive Mode During Month End Close

Check this box to lock Recall in exclusive mode when the Month End Close is initiated. If this option is selected, when the Month End Close is initiated, Total Recall will verify that all users are logged out of the program prior to displaying the Month End Close screen. If users are logged in, the user will be prompted to view the list of users currently logged into the program. Once all users have logged out, the Month End Close screen can be opened and Month End processing can be initiated. While Month End is processing, any user attempting to access the program will receive the message ‘File Access is Denied’. Once the processing is complete, access will be enabled for users.

Edit Retention Code Dates

If this option is selected the user will have the ability to modify the expiration date that has been associated with the retention code selected.

Duplicate Location on Re-file Box

This feature, if selected will duplicate the location field when containers are manually re-filed. The location will be entered on the first re-file line and will be duplicated from that point to the last work order line.
Work Order / Space Allocation Tab

Fig. 10.4 displays the **Work Order / Space Allocation** window in edit mode. This window allows the system administrator to enter notes to print on the invoice, select additional parameters, select the allocation features and work order parameters. Each field on this screen is detailed immediately following.

**Service Code Categories**

Total Recall has thirteen service code categories. These categories are used when creating or editing master or customer service codes. The category determines which activity codes appear on which work order line screen. The service code categories cannot be added, deleted or modified.

**Note to Print on all Invoices**

This is a ‘free text’ field for the user to enter a message that is to be printed on all invoices printed in Total Recall. To print a message on a specific invoice only, refer to Chapter 8.

**Allow Users to open Multiple copies of Total Recall**

This option should be selected to allow a user to open more than one copy of Total Recall in a single workstation, provided that a multi-user version of Total Recall is in use. If this option is not selected and a user attempts to open another version of Total Recall with one already open, it will open the version minimized on the start bar. *Note: Each time Total Recall is opened a license is used, a user opening Total Recall twice on a single workstation uses two licenses.*

![System Parameters Setup Screen](image)
With this option selected, when the pre-print label option is selected from the Maintenance Menu – Customer Labels, a window prompts the user for the number of labels to be assigned. The parameter label is only locked for the few seconds the user takes to enter the amount of labels and click <OK> or press the [ENTER] key on the keyboard. Without this option selected, when the user accesses the pre-print label screen, a screen will display notifying the user that the parameter screen will be locked. The user clicks <OK> and then a second screen is opened for the user to identify the number of labels, assign them to a customer and/or a department and then save the entry. The parameter screen locked the entire time.

If this option is selected, the user will be able to scan new containers into Total Recall without identifying a department on a ‘Department Required’ account. The work order will automatically close and the user can access the closed work order to enter the department. The department will carry to the inventory record immediately.

Total Recall has four memo fields associated with each container and each indexed item. These memo fields are attached to the description field and the first three reference fields. This option only affects the memo fields associated with the three reference fields. If these fields are not going to be used, click this button so that they do Not display thus not allowing entry to these fields.

If this option is selected, as containers that were previously permanently removed from inventory are sent back and scanned into inventory at the record center, a message will display on the Barcode Error Report, advising the user that the container was previously removed from inventory.

This feature is used in Dynamic Allocation only. Indicate in this field the default storage code. This code should reflect the most common storage code for containers and indexed items used at the record center. When a new container or indexed item is scanned into inventory, Total Recall goes through a hierarchy to determine the storage code of the container or indexed item. This field reflects the storage code used if it cannot be assigned through the other methodologies. Note: See Chapter 4 – Scanning to get more information on the scanning hierarchy.

This feature is to indicate the add code to be used when containers or index items are added to the program using the Dispatch Module.
Container / Indexed Item
No Find Code

This feature is to indicate the No Find code to be used when containers or index items are marked as No Find in the program.

Work Order Parameters

Perpetually Engage Print Labels
Check the box to have the Print Labels flag set to ‘Yes’ when containers or indexed items are added to inventory. This will allow the user to print labels for the containers or indexed items added on a work order from the work order screen.

Include Box Retrievals
Check to have the Print Labels flag set to ‘Yes’ when containers are retrieved in Total Recall. This will allow the user to print labels for the containers retrieved on a work order from the work order screen.

Perpetually Engage Dups on Adds
Check to have the ‘Dups on Adds’ feature automatically engaged to duplicate work order lines for every work order created. This feature speeds up data entry when more than one line of the same activity are being added to a work order.

Reference Indexed Items with WO line #
If this feature is selected, as items are indexed in Total Recall the work order line number is added to the item ID field. This then serves as a sequencing number for the container. If this feature is used, a new work order will need to be created for each container indexed.

Sequentially number indexed items in Box
This feature when invoked will add a six-digit item ID to each item indexed in the container. When an item is indexed within a container, Total Recall will look to see if any items have been previously indexed within the container, if they have and they have sequential numbers that were automatically added, the next Item ID will be the next sequential number.

Allow Other Customers to Request Boxes
Click this check box if you want customers to be able to withdraw containers and/or indexed items from other customers’ inventory. This is usually only selected for corporate packages where the customers are the departments and the departments are authorized to pull containers or indexed items from the other departments.

Perpetually engage auto close WO
If this feature is selected, as barcode imports are imported into Total Recall the work orders created will be automatically closed.

Never charge tax on Trans Surcharge
Does not calculate and charge tax on Transportation Surcharges. Select or clear based on taxing laws in your operating area.
Require Requestor on all WO’s To require that a requestor be entered for all work orders added to Total Recall, check this box. As work orders are added, if the person requesting the service is not entered the work order header cannot be saved. A message displays stating ‘You must specify who is making the request’. The user can click the <OK> button and enter the requestor before saving the work order header.

Require WO Description on all WO’s To require that a work order description be entered for all work orders added to Total Recall, check this box. As work orders are added, the work order description must be entered before the work order header can be saved. The work order description can automatically key the work order priority, the transportation, the work order due date and the due time. A message displays stating ‘You must input a work order description’ when the work order is saved without a description. The user can click the <OK> button and enter the description before Saving the work order header.

Turn on Work Order auditing This option logs what information is added, removed or changed on the Work Order lines. Results are shown on the Auditing Report.

Perpetually Engage DE Automatically highlights the TR Container # or TR Item # field on the appropriate rapid entry window. Engage to speed Data Entry.

Include File Retrievals Check to have the Print Labels flag set to ‘Yes’ when indexed items are retrieved in Total Recall. This will allow the user to print labels for the indexed items retrieved on a work order from the work order screen.

Confirm Saves on Exit Click here to have the system to prompt a save message after a work order line has been added, a new line has been created using the ‘Dups on Adds’ feature and the <Exit> button is clicked. The work order line the system is prompting to save is the newly created line. Refer to the ‘Line #’ field in the upper right corner of the work order screen to verify the number of lines saved on the current work order.

Include Memos Check to have the ‘Dups on Add’ feature automatically engaged for the description and reference memo fields.

Confirm No Find Code Click here to have Total Recall prompt a user to change the current retrieval code for a container or indexed item to a No Find search code. If this feature is Not checked, the No Find code will update without prompting the user to confirm the change.

Use TR File # as Item ID Fixed Allocation Only The indexed item is tracked by the item ID that must be unique to the container. With this option selected, the Total Recall item number will automatically be assigned as the item ID.
Do Not Pad Ref 1 with 0's

This option refers to the ‘Copy Total Recall Container Number to the Reference 1 field’ option available on the default tab of the Customer Maintenance screen. If the copy container to Ref 1 is selected, check this box to Not have the number preceded with zeros to become a 10-digit number.

Turn Off DE change tracking

Turns off the Data Entry change tracking function. Changes to container and indexed items are tracked and recorded, and can be viewed from the <Change> button on either the Container Maintenance or Indexed Item Maintenance window. When checked, the tracking feature is disabled.

Do not advance PP from utility

Do Not Advance Pre-Print Labels from the Utility Menu. This option holds the TR Container # in the System Parameters; the number is not advanced when additional pre-print labels are created.

FNM as default

This feature, Find Nearest Match, is a specialized feature that locates a container where a file is stored. Files within the containers are sequential and the first file number contained within the container is listed in the container reference 1 field. The user enters the file number to be located and Total Recall locates the container where the file is stored.

Match 1st

This feature works in conjunction with the Find Nearest Match feature, with this feature selected, Total Recall will match the first record found.

Make Item Out Dates equal to

- WO Due Date
- WO Close Date
- WO Line Create Date
- Override Manual Input

If this option is selected, as containers or indexed items are retrieved, the date out will display as the date the work order was created. When the work order is closed this date will change to the date the work order is closed. This is the date that will reflect in inventory as the date the container or indexed item was retrieved.

If this option is selected, as containers or indexed items are retrieved, the date out will display as the date the Work Order line was created. Does not allow the dates to be modified manually.

Custom Captions to be Utilized

Select the screen where the custom captions are to be used for indexing new containers or items. The option selected here copies to all customers as they are added. Options are System, Customer, Department, Type, or Record Series.
Space Allocation Parameters

**Fixed Location Storage**
Check **Fixed Location Storage** if containers are going to be stored in fixed locations and tracked by the unique location number. Fixed allocation only allows one container to be stored per location. When a container is retrieved, the space remains open until that container is returned to inventory.

When **Fixed Location Storage** is selected, a check box will display for the user to indicate whether or not automatic allocation is to be activated. Automatic allocation will automatically assign the next available location when a new container is added, this can then be accepted or changed by the user adding the container. Without this feature checked the user must enter a unique location for each container added.

**Dynamic Allocation**
Check **Dynamic Allocation** to store containers dynamically, allowing a location to contain more than one container. Using **Dynamic Allocation** containers are tracked by a unique Total Recall container number. This number is barcoded and placed on the container, typically containers are added and moved throughout the warehouse with a barcode scanner. When a container is retrieved, the location becomes available for any other container.

**Release Location when Container is Retrieved**
When **Dynamic Allocation** is selected, the user has the option to release the location within the container record when the container is retrieved. With this box checked, the location for the retrieved container will show blank until the container is returned and scanned to a location. If this box is not checked the last location the container resided in will display with the container record until the container is returned to the record center.
Bar Code / Field Lengths Tab

Fig. 10.5 displays the **Bar Code/Field Lengths** window in edit mode. This window allows the System Administrator to select the bar code settings and field lengths.

**Barcode Code / Field Lengths**

**Fig. 10.5**

**Auto Renumber**

This option automatically renumbers work order lines when a line is deleted and the total number of work order lines is less than the number entered into this field. If the number of lines is greater than this number, Total Recall will prompt the user ‘Do you wish to Renumber Work Order lines?’ If you have additional lines to delete, Select <No> until you delete the last work order line, then select <Yes> as the last line is being deleted.

**Bar Code Settings**

**Default Relocation Code**

Enter into this field the relocation code to be used when a container is returned to inventory that was Not retrieved using the handheld scanner. The system will automatically add a line on the work order to relocate the container using the relocate code indicated here. If a code is Not entered here and a container is attempted to be returned that was never retrieved, an error will be reported that must be reconciled. If a relocate code is listed here it will relocate the container to where it was scanned and notify the user when the upload is complete that the container was not retrieved and a relocation line was created.
**Use Std UC39**
Check this box if Standard 3 of 9 Bar Code Fonts are being used to create the Bar Code Labels in Total Recall.

**Options**
The default setting for this field is ‘0’. If a bar code other than 3 of 9 is being used, enter the options parameter into this field. The options parameter uses an 8-bit mapping scheme that determines the value of the options parameter. For example, to translate for full ASCII Code 39 with a Mod 34 check digit, set the options parameter to 192 (128 + 64). In general, add the values for the options you want. Refer to the chart below for the values and contact a member of DHS Worldwide Tech Support Team.

<table>
<thead>
<tr>
<th>Bit 7</th>
<th>Bit 6</th>
<th>Bit 5</th>
<th>Bit 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>Code 39</td>
<td>I 2 of 5</td>
<td>Code 128</td>
</tr>
<tr>
<td>128</td>
<td>Full ASCII</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>64</td>
<td>Mod 34</td>
<td>--</td>
<td>--</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Bit 3</th>
<th>Bit 2</th>
<th>Bit 1</th>
<th>Bit 0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>Code 39</td>
<td>I 2 of 5</td>
<td>Code 128</td>
</tr>
<tr>
<td>8</td>
<td>Std Mod 10</td>
<td>Std Mod 10</td>
<td>Std Mod 10</td>
</tr>
<tr>
<td></td>
<td>1-2-1 Mod 10</td>
<td>1-2-1 Mod 10</td>
<td>1-2-1 Mod 10</td>
</tr>
<tr>
<td>4</td>
<td>CLSI Mod 10</td>
<td>CLSI Mod 10</td>
<td>CLSI Mod 10</td>
</tr>
<tr>
<td>2</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>1</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
</tbody>
</table>

**Code**
The default setting for this field is ‘1’ if you are using 3 of 9 Bar Codes. Refer to the chart below for the code to enter if you are using a bar code other than 3 of 9.

<table>
<thead>
<tr>
<th>Bit 0</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>3</td>
</tr>
<tr>
<td>4</td>
</tr>
<tr>
<td>5</td>
</tr>
</tbody>
</table>
Portable Scanner Option

The default setting for this field is ‘0’. If you are using alternative bar codes, it will sometimes be necessary to enter a different setting in this field. A representative of DHS Worldwide will advise you when this code needs to be changed.

Alternative Bar Code Source

If labels are being used that do not represent a unique tracking number or if the bar code labels are not all numeric, it may be necessary to use an Alternative Bar Code Source. This will be set up when data is converted and you will be advised if settings need to be changed.

Valid Location Length

For certain Apex II scanner programs it is necessary for the bar code lengths to be validated. If this is the case, enter the number of characters (without dashes) that exist in the shelf location barcode. Note: If the bar code of the shelf labels include the dashes, this length will include the number of characters and dashes.

Valid Container Length

For certain Apex II scanner programs it is necessary for the container bar code length to be validated. If this is the case, enter the number of characters that exist in the container barcode. To allow only the specified number of digits entered here to be entered when pre-assigned labels are created, check the box to the right of this field beneath the letter ‘S’.

Valid Lengths

Identify Indexed Items

For certain Apex II scanner programs it is necessary for the indexed item bar code length to be validated. If this is the case, enter the number of characters that exist in the container barcode. To allow only the specified number of digits entered here to be entered when Pre-Assigned Labels are created, check the box to the right of this field beneath the letter ‘S’.

Validate Tapes by Length

For certain Apex II scanner programs it is necessary for the tape bar code length to be validated. If this is the case, enter the number of characters that exist in the tape bar code.

Dashes in Shelf Level

When looking at a shelf label, there are usually dashes to separate the sections. Usually these dashes are not found in the actual bar code, they are only in the human readable. If the shelf labels that you are using have a dash in the actual bar code, check this box, and Total Recall will ignore the dashes when it reads the bar code.

Print Custom

If a custom download error report and a custom bar code upload report have been created, you will need to check this box to automatically print these reports.
Valid Re-files By Length

If indexed item re-files are to be validated by the length and customized Apex II programs are being used, this field may need to be selected.

Turn on Corp Direct

This option refers to a specific customized Apex II program. This option will only be selected if this program is in use.

Worthington Scanner

If the record center is using the Worthington Tricorder scanners, check this box.

Notify when Location is Over Allocated

Dynamic Allocation Only – If this option is selected, as containers are scanned to a location, Total Recall will verify the number of containers currently listed in the location and notify the user if the location is over allocated on the error report. A work order line will Not be created unless the option below is selected. Note: If this option is used, the facility layout must be built and the container location must be released when the container is retrieved.

Create WO Line when Over Alloc

This option works in conjunction with the previous option. If this option is checked, a work order line will be created over allocating the location and an error will display on the error report.

Web Options

Engage Auto Print Web Orders

This option works in conjunction with the Web Server Module. If this option is selected, after web orders have been imported, the work order print screen will display allowing the user to print the newly imported web orders.

GL # Setup

GL ID

Click on the <Alter Tables> button to access this field. This field allows the user to set a general ledger number greater than eight characters. Once the <Alter Tables> button has been clicked and modifications made, the user will need to click the <Save> button to allow Total Recall to process the request and adjust the field for all tables. The user must have exclusive use of Total Recall before the user can proceed with this save. Note: Depending on the number of records in the database tables, this process may take from a few seconds to more than an hour. This process should be run from the server.

TR Setup

TR Con ID

In some cases it may be necessary to use a container number in excess of 10 digits, if container labels contain bar code labels with more than ten digits. Click on the <Alter Tables> button to access this field. Set a Total Recall container ID designation. Once the <Alter Tables> button
has been clicked and modifications made, the user will need to click the <Save> button to allow Total Recall to process the request and adjust the field for all tables. The user must have exclusive use of Total Recall before the user can proceed with this Save. Note: Depending on the number of records in the database tables, this process may take from a few seconds to more than an hour. This process should be run from the server. This should only be altered through advice of DHS Worldwide.

**General System**

General System The General System section allows the System Administrator to change key field lengths. To modify fields, the user must have exclusive use of Total Recall. Click the <Alter Tables> button at the bottom of the section and make necessary changes. All fields should be altered before the changes are saved. Click the <Save> button once all changes have been made. When the save button is clicked, a warning screen will display advising the user that if fields are shortened existing data will be lost. Click <Continue> to proceed with the changes or <Cancel> to Exit the screen without completing the changes.

Customer ID This field defines the maximum number of digits for a valid customer ID.

Record Series This field designates the maximum number of digits for the record series.

# Of $ Decimals This field designates the number of valid digits after the decimal in a dollar amount.

# Of Phone Digits This field allows user to designate the number of digits in a telephone number.

Requested By This field allows user to designate the number of characters in the requestors name on the retrieval screens and in the work order header.

Facility Layout Setup Total Recall is flexible to accommodate the record centers’ needs. A layout location number scheme to meet your present and future needs should be well thought out prior to setting up your facility. Changing to a new scheme later would require converting all existing data. An example of a facility layout may be: 1-01-A-07-12. In this example, there are 8 characters or digits, in 5 segments (each segment is separated by a dash), with a layout scheme of 1-2-1-2-2.
Each segment, separated by dashes, of a layout location number should indicate a coordinate that will be used when locating a container within your facility. (For Example: the 1st segment may designate the specific Warehouse. Other segments may represent an aisle, a section, a shelf within a section, a column, a row in Fixed Allocation or the item position on a shelf.)

The facility layout should be set prior to entering new data or converting existing data into Total Recall. To setup the facility layout, click on the Alter Tables button and enter data into each of the designated fields.

After data has been entered, click the Save button to save the data and aligned the locations to the specifications entered. Click the Exit button to exit without a save. Depending on the size of your database tables, this could take a few minutes to several hours. If the data you entered does not calculate correctly when you click the Save button, correct the necessary field and save again. When you save, a warning screen will display advising user if fields are being shortened, fields could be truncated and data lost. Click Continue to proceed or Cancel to exit without proceeding.

### # Of Char/Digits
A shelf location can be up to 15 characters in length. Indicate in this field the total number of characters or digits, excluding dashes, in the shelf location.

### # Of Segments
Each segment can contain from 1-9 characters or digits. Enter into this field the total number of segments in your shelf location.

### Layout Detail
Indicate in this field the number of characters in each segment, placing dashes “–“ between each segment. This will mask the dashes in the shelf location throughout Total Recall.

### Indexed Fields
The System Administrator has the option to change field lengths for the Indexed Item field, the Description field and the nine (9) Reference fields. To modify the field lengths, the user must have Exclusive Use of Total Recall™. Depending on the size of the Database tables, this process could take a few minutes to several hours to complete. All fields should be altered before saving changes. Click on the Alter Tables button and change the field lengths. After data has been entered click the Save button to save it, or the Exit button to Exit without a Save. When the Save button is clicked, a warning screen will display advising the user that data will be lost if the field lengths are shortened. Click Continue to proceed or Cancel to Exit without proceeding.

Note: The purpose of the Reference fields is to quickly locate a Container or Indexed Item, therefore it is not recommended to lengthen the Reference fields past 20 or 25 characters.
Default Captions Tab

From the Default Captions tab, the user has the ability to customize the description and reference field captions on a system-wide basis. This allows for easy and more accurate data entry. Fig. 10.6 displays the default captions window in the edit mode. A similar screen to this is available on a customer and department basis from tabs on the Customer Maintenance screen and on an item type and record series basis from the Maintenance Menu.

To simplify and create accurate data entry screens, the user has the ability to change what is reflected on the work order line input screen by customizing the reference fields to reflect the information to be contained within that field. This field is limited to 15 characters. For example, if the customer box number is to be entered in the container reference 1 field, by changing ‘Reference 1’ to ‘Customer Box #’, the person doing data entry knows that a box number is to be entered in that field. These default captions also appear in the report headers. Therefore when reports are printed, if the captions have been customized, the report can be easily read and understood by the customer.

On this screen, enter the customized default caption for all appropriate fields. Enter an abbreviated version, up to five (5) characters, of the caption for those areas within Total Recall where the entire caption cannot be displayed. Captions entered on this screen will be copied to the customer caption screen when a new customer is added and can be edited on a customer- by- customer basis.
Security

The Security option allows the system administrator to assign access levels for all system users, add new users and delete users from Total Recall. Each time a user logs into Total Recall, they will need to enter a user ID and a password. The level of access determines what operations can be performed in each menu option. Each time a record is updated, the user ID and date of the update will be recorded. The second option under this menu allows the administrator to copy the security settings from one user to another or from one user to a new user.

The System Security screen has a window ‘Tab’ for each option of the Total Recall Main menu. Within each window is a listing of functions related to the menu option and their corresponding user access levels.

A screen similar to the one on Fig. 10.7 displays when the security option is selected from the system menu.

User ID The ID of the user is displayed in the upper left corner of the screen, just above the ‘tabs’. Be sure to verify the user ID before beginning to change access levels. The buttons in the tool bar will allow the user to scroll through the current users. To view another window tab, simply click on the tab.

User Maintenance The User Maintenance ‘tab’ allows user ID’s and passwords to be added, edited, and deleted. It will maintain the original create date, the last date the record was updated and the user ID of the user that last updated the record.
Add a User  
To add a user, click on the <Add> button from the navigational tool bar. This will display a blank ‘System Security’ screen, with the ‘User Maintenance’ tab active, click with the mouse in the <User ID> field to activate the cursor. The table below details the fields on this screen. Once data has been entered, continue through the ‘Tab’ menus to select the access levels for the user added. When complete, click on the <Save> button in the navigational tool bar. If you do not wish to save the record, click on <Revert> and then <Exit>.

User ID  
Type in the identification of the person being added to the system. This is the name that person will be entering each time they log on to the system. The Identification can be a first name, first and last name, first name and last initial, 3 initials, an employee number, any combination of letters or numbers that the user will remember easily. This ID will show on some areas of different screens and on some reports. A user ID cannot exceed 8 characters or digits, with a minimum of 3 characters.

Password  
This needs to be any combination of at least three (3) and no more than eight (8) letters or numbers that the user can easily remember. This will be entered on the security logon screen along with the user ID every time a user logs into Total Recall.

Security Description  
This may be used for the user’s title (For example - System Administrator) or the level of access granted to the User (For example - ‘Read Only Access’ or ‘Limited Access’).

Create Date  
This field will automatically default to the system date when this record was initially created.

Update Date  
This field will automatically default to the system date when the record was last updated. If the record has Not been updated since it was created, the create date will be reflected in this field.

Update ID  
This field will automatically default to the user ID that was logged into the system at the time the record was updated.

Disable Boolean Search  
This check box allows the System Administrator to disable the Boolean search feature for the selected user. The Boolean search feature allows the user to enter search criteria and filter the results. This type of search can be time consuming depending on the size of the databases, and therefore should be disabled for most users. With the checkbox checked, the <Search> buttons will be de-activated on the container and indexed items inquiry screens.
<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Enable Global Replace</strong></td>
<td>Check this box to enable Global Replace capabilities. This feature allows for large amounts of data to be changed very quickly without an audit trail and should be used with extreme caution. Access to this feature should be very limited.</td>
</tr>
<tr>
<td><strong>Do Not Notify user of Pending Web Orders</strong></td>
<td>This check box allows the System Administrator to disable the Web Notification feature for selected users. If this box has been checked, the user will not receive the notification that web orders are pending.</td>
</tr>
<tr>
<td><strong>Do Not Allow User to Validate Work Orders</strong></td>
<td>Prohibits this user from validating work orders. Work Order Validation requires exclusive use of the system. Access to this feature should be very limited; therefore, most users should have a check in this box.</td>
</tr>
<tr>
<td><strong>Show Toolbar on Startup</strong></td>
<td>Defines whether or not the toolbar will display when the user logs in to Total Recall. Toolbar can be turned on or off from the File menu.</td>
</tr>
<tr>
<td><strong>Override Do Not Destroy</strong></td>
<td>When checked, the user can override or remove a Hold order previously placed on a container or file. Access to this feature should be very limited.</td>
</tr>
<tr>
<td><strong>Assign Scan on Demand License at Login</strong></td>
<td>Used only when the Scan on Demand module is used with Total Recall. Should be checked only on those users who will be using Scan on Demand. Access to this feature should be limited; the license is assigned on a first come-first serve basis.</td>
</tr>
<tr>
<td><strong>Administrative Power Features</strong></td>
<td>The Administrative Power Features are a series of checkboxes enabling or disabling features throughout Total Recall. The options in the lower portion of this screen should NOT be selected for any users.</td>
</tr>
<tr>
<td><strong>Edit Statistical Data</strong></td>
<td>Check this box if you would like the user to have the ability to Edit Statistical Data from the customer and master service code screens in Total Recall. Limited access to this feature should be exercised.</td>
</tr>
<tr>
<td><strong>Edit WO Multi-Print</strong></td>
<td>Check these boxes if you would like the user to have the ability to edit the Work Order Multi-Print feature.</td>
</tr>
<tr>
<td><strong>Block User’s Ability to Delete Work Orders</strong></td>
<td>Check these boxes if you want to prevent the user from deleting open work orders in Total Recall. If this option is engaged, the &lt;Delete&gt; button will not be enabled on the work order screen.</td>
</tr>
</tbody>
</table>
**Block User’s Ability to Delete Pre-Print Labels**
Check this box to deny access to the user from deleting records from the Pre-Print Label table. It is highly recommended that this option be selected for all users.

**Block User’s Ability to Edit Pre-Prints**
Check this box to deny access to the user to edit records in the Pre-Print Label table. It is highly recommended that this option be selected for all users.

**Block User’s Ability to Add Lines to Closed WO**
Check this box to deny access to the user from adding work order lines to closed work orders. ‘Other’ billing lines can be added but activity lines cannot be added if this option is selected.

**Work Order Closing**
Check this box to give the selected user access to close work orders in Total Recall.

**Multi WO Closing**
Check this box to give user access to closing multiple work orders at one time in Total Recall. Limited access to this feature should be exercised.

**Containers**

- **Modify Storage Code**
  Allows user to modify the storage code assigned to the container. *Note: Using this feature does not create an audit trail.*

- **Directly Add**
  Allows user to directly add containers through the Container Maintenance screen. *Note: It is recommended that containers are added through a work order or a barcode scan because it establishes an audit trail.*

- **Directly Delete**
  Allows user to directly delete containers through the Container Maintenance screen. *Note: It is recommended that containers are deleted through the permanent removal function of a work order because it establishes an audit trail.*

- **Change Location**
  Allows user to change location of the container through the Container Maintenance screen. *Note: It is recommended that the locations of containers are changed through the relocate feature on the work order or a barcode scan because it establishes an audit trail.*

**Items In Containers**

- **Modify Storage Code**
  Allows user to modify the storage code assigned to the item in the container on the Indexed Item Maintenance screen. *Note: Using this feature does not create an audit trail.*
**Directly Add** Allows user to directly add indexed items on the Indexed Item Maintenance screen. *Note: It is recommended that indexed items are added through a work order or a barcode scan because it establishes an audit trail.*

**Directly Delete** This option allows user to directly delete indexed items on the Indexed Item Maintenance screen. *Note: It is recommended that indexed items are deleted through the permanent removal function of a work order because it establishes an audit trail.*

**Change Location TR Container** This option allows user to change location of the container on the Maintenance screen. *Note: It is recommended that the locations are changed through a work order or a barcode scan because it establishes an audit trail.*

**Access Level Assignment** Once a new user has been added, access levels for each menu option must be assigned. Click on the File ‘Tab’ to display the File Menu Options. Next to each option are the access levels available. For this window, the options are None, Read, or Add/Edit. To designate a level for the user, click on the highest access level for the user, and continue for each option listed. After completing this window, click on the next window ‘Tab’ and continue selecting an access level for each option under each window ‘Tab’. The System ‘Tab’ is where a user is granted access to change information pertaining to the System Parameters and the security levels. Limited access to these options are highly recommended. After assigning access levels, click on the <Save> button to save the information.

**Edit User** Select the user to be modified by using the buttons on the navigation tool bar. With the user to be edited showing in the ‘User ID’ field, simply click on the <Edit> button. Edit the user as necessary, clicking through the various ‘Tabs’. After all changes have been made, click on the <Save> button of the navigational tool bar to save the changes. To discard all changes made to the record and restore the original information, click on the <Revert> button prior to saving the information.

**Delete User** Select the user to be deleted. With the user to be deleted displayed in the ‘User ID’ field, simply click on the <Delete> button on the navigation tool bar. Total Recall will display a message screen to verify the record to be deleted. Click on the <Yes> button to continue with the deletion or the <No> button to cancel the delete.
Report Defaults

There are many reports available in Total Recall. Many of these have multiple versions that display data in slightly different formats. This menu option allows the user to establish which version will be used as the default for each report. The default output method can also be selected: (Preview) displayed on screen, (Print) sent to a printer or (File) saved to a text file. A sample Report Defaults screen is displayed on Fig 10.8.

The navigation tool bar operates as it has throughout the program. The report number and report title are displayed at the top of each screen. Use the buttons on the tool bar to select the report to set defaults. Click on the <Edit> button to modify the report and version to be defaulted. The output method and number of copies to be printed can be set on this screen. If a custom report has been created, select ‘Use Custom Report’. Click on the <Save> button to save the changes or the <Revert> button to cancel the changes made. Click on the <Exit> button when finished.
The User Log on information option allows a user to view a list of users currently logged into Total Recall. This screen can be very beneficial to identify users logged in when attempting to perform an exclusive use feature.

Click on the <Refresh> button to have the screen automatically refresh the currently logged on users. Click the <Exit> button to exit this screen and return to the Main Menu.
Data Path

The Data Path option allows the user to view where Total Recall data files are located. A screen similar to this one in Fig 10.10 displays when you select the Data Path option from the System Menu.

![Data Path Screen](image)

This screen will display the data path where Total Recall data files are stored. Click on <OK> and a second window will display where the Total Recall program is located. Click <OK> to exit this screen and return to the Main Menu.

Language Management

Total Recall can be customized for users who speak languages other than English. This menu option allows the System Administrator to alter record captions individually. After new captions are created, the User’s default language can be selected from the System Security window, the WO Defaults tab. Captions not modified will appear in English. Additional languages can be added and customized, as needed.
CHAPTER ELEVEN
Additional Menus
CHAPTER 11

Additional Menus

Overview

Total Recall has four additional menus: Remote, Edit, Help, and Search. Their functions are highlighted in this chapter.

Remote Menu

![Remote Menu](image1)

Fig. 11.1

The Remote menu is for a separate operational module. The menu is enabled only when properly licensed.

Edit Menu

![Edit Menu](image2)

Fig. 11.2

The Edit menu contains common Windows™ editing commands: Undo, Redo, Cut, Copy, Paste, Clear, and Select All. Select the menu option or use the keystroke combinations to perform the appropriate command.
Help Menu

Fig. 11.3

The **Help** menu accesses the integrated **Manual**, **Quick Reference Guides** and **Release Notes**. Each document opens for viewing an Adobe .pdf format. Pages can be printed as needed, or quickly viewed on screen. **About Total Recall** displays your current licensing and version information.

Search

Fig. 11.4

This menu is a shortcut to the Search Master Screen. This window allows for a cross-referencing search of inventory. This search is often referred to as the Open Shelf Search window. Enter any combination of known information; Total Recall will display records that meet those criteria. See Chapter 3 for more details on the Search Master Screen.