WEB ACCESS QUICK START

For web access login at www.datasitenw.com/online_access.htm and choose Records Storage Client Access. Enter your account number, user name and password.

Ordering boxes or indexed files

1. Click on Inventory Tab
2. Choose which field you would like to search by choosing an item in the drop down menu. E.g. File Description, Full Text Search, Box Description, etc. Then enter in your search criteria. Click the Search button.

- To display the desired record, click on it in the search results
- To show or hide search results, click the Show | Hide search result button
- To narrow your search results, click the "Show advanced search" button, and apply additional search criteria then repeat the search.

3. Either in the search results or below click the shopping cart icon to add the item to "My Cart". Once selected for "My Cart" the cart will look like it has a box in the shopping cart.
4. Once you are done adding items from inventory to the order, click on the "My Cart" tab to check out your order.
5. See below for completing your order.

(Note: you can also add items to an order from a work list, or by pasting in a list of box or file numbers. ***Items in your cart will not be saved when you log out.*** *Therefore, you may wish to add your items to your work list,* ***then*** *add them from here to your cart if creating your order will take more than one session.)*

Ordering non-indexed files

1. Click on Inventory Tab
2. Choose which field you would like to search by choosing an item in the drop down menu. E.g Full Text Search, Box Description, etc. Then enter in your search criteria.

- To display the desired record, click on it in the search results
- To show or hide search results, click the Show | Hide search result button
- To narrow your search results, click the "Show advanced search" button, and apply additional search criteria then repeat the search.

3. At the top of the box record, click the File icon to view the list of files indexed in the box.
4. Verify that the file does not appear in the list. (If it does, you can add it to the cart from this list.)
5. In the section below this list, enter the file information in the description field.
6. Specify the recipient, and click "Add to order". The file will now be in your cart.
7. See below for completing your order.

Completing your order

1. Click on the “My Cart” tab
2. In the top section, review the items. You may remove items, change the recipient, mark items as “permanently out”, or indicate that items are being returned to the record center rather than being delivered.
3. Add any additional services or products to the order, such as:

- Pick-up of items at your site by the record center (please specify the number of boxes or files to pickup)
- Sale of empty boxes (bundles of 25)
- Shredding container services (only if you require service dates in addition to your regularly scheduled dates.)
- Additional “Line items”, such as box labels.

4. Specify the delivery type, delivery address, and any special instructions.
5. Click “Submit order”
6. Review the order slip, and print it (optional)

(Note :Regular and “by date” orders going to the same delivery address at the same time are automatically grouped onto the same delivery.)

Ordering items by pasting in a list

1. Click on the “My Cart” tab
2. Expand the “Batch addition” section
3. Specify the type of list (e.g. Box numbers)
4. Paste in the values, one per line, without punctuation
5. Complete the details in the Delivery section as above, and click Submit.

(Note: Regular and “by date” orders going to the same delivery address at the same time are automatically grouped onto the same delivery.)

Cancelling an order

If you have submitted an order and wish to cancel it, call Datasite as soon as possible. We can easily delete an order for you if we have not started picking it yet.

WEB ACCESS QUICK START

Searching for items *Boxes or Files*

1. Click on Inventory Tab
2. Choose which field you would like to search by choosing an item in the drop down menu. E.g. File Description, Full Text Search, Box Description, etc. Then enter in your search criteria

- To display the desired record, click on it in the search results
- To show or hide search results, click the Show | Hide search result button
- To narrow your search results, click the "Show advanced search" button, and apply additional search criteria then repeat the search.

Sending new boxes to DataSite

1. Affix a new label, issued by Datasite, to your new box.
2. Click on Inventory Tab
3. Search by Box – Number or by Pre Add under the status. This will list that barcode number or will give you a list of Pre Add items. **Note: Pre Add barcodes show up in your inventory after we issue new barcodes.**
4. Enter in your info into the desired field. E.g. Description, Field 1, Start/End date, etc. **Note: The fields in red are required fields. If you don't have a department or record series chose the SELECT option. If you do not have a disposal date please select FIXED from the drop down menu and select NONE.**
5. Select Update after you have entered in all your info.
6. After you have data entered all boxes go to "My Cart" and select Returns/Pickups. Select Boxes and put in the exact quantities for pickup. Select ADD.
7. Specify the delivery type, delivery address, and any special instructions.
8. Click "Submit order"
9. Review the order slip, and print it (optional)

To edit a box or file

1. Click on Inventory Tab
2. Choose which field you would like to search by choosing an item in the drop down menu. E.g. File Description, Full Text Search, Box Description, etc. Then enter in your search criteria
3. Click on the item in the search results to go to that record.
4. Make the desired changes**. Note: The fields in red are required fields. If you don't have a department or record series chose the SELECT option. If you do not have a disposal date please select FIXED from the drop down menu and select NONE.**
5. Click the "UPDATE" button to save your modifications.

Adding a file (including interfiles)

1. On the inventory tab, click the “Add File” button.
2. Enter data for the file, including the number of the box to which the file belongs under Location. **Note: The fields in red are required fields. If you don’t have a department or record series choose the SELECT option. If you want to enter a disposal date please select FIXED from the drop down menu and select CONFIDENTIAL.**
3. For interfiles only, affix a file label. Put that file barcode under the NUMBER field. **Note: For new files going out in new boxes the system will automatically assign a file barcodes. This is only for Interfiles.**
4. At the bottom of the form specify what to do after adding the file. Normally you would choose “Create another Item”.
5. Click the “Add file” button at the bottom to complete the operation.

   (If adding multiple files, information from the previous file will be automatically carried over.)
6. Once you have entered in your new files/interfiles please go to “My Cart” and select Returns/Pickups. Select Boxes or files and put in the exact quantities for pickup. Select ADD. For new files into new boxes please put the number of boxes. If you are sending off interfiles please put the number of files to pickup.
7. Specify the delivery type, delivery address, and any special instructions.
8. Click “Submit order”
9. Review the order slip, and print it (optional)

Importing data for multiple boxes or files

1. From the home tab of ActiveWeb, download the template for importing data.
2. Fill in this spreadsheet with the data that you wish to import.
3. On the inventory tab, click the “Import” button to select the file to import.

For more information, see the video tutorial at http://www.youtube.com/watch?v=WcAuRXswUDA

Viewing reports

1. Click on the “Reports” tab
2. Specify the type of report (boxes, files, order items, imaged delivery slips)
3. For boxes or files, you may start with a default report layout, or start with a blank report and then select and arrange the fields that you wish to include.
4. Select a field to sort on
5. Add as many search criteria as desired. (e.g., to include only items that are “Out”, set Field to “Status, Type to “Equal”, and value to “In”, then click the Add button.)

6. Select an output format. (E.g. “Excel without formatting” is good if you wish to have a spreadsheet that you can process.)
7. Click the “Create” button to produce the report.

ActiveWeb Glossary of Terms

<u>Active Web</u>

Status = In	At DataSite
Status = Out	At customers location
Status = Selected	Pending on another order
Status = Pre Add	Any boxes or files not sent to DataSite
Indexed files	Files for which a record exists in the ActiveWeb system
Non-indexed files	Files are not listed by name in the ActiveWeb system
Work List	Place for accumulating a list of boxes and files to process, e.g. for ordering, marking as permanently out, marking for disposal
Interfiles	Placement of a previously non-barcoded file or document into a specified box or file