# ADDING BOXES AND FILES TO INVENTORY

## Adding New Items

### Overview

The Total Recall SQL Web Module includes several ways for a user to add items to their inventory. This process will create a work order in the Total RecallSQL main module. The types of adds are: Adding Boxes, Adding Files to New Boxes, Non-Indexed Add and Retrieve and Adding Multiple Files to Existing Boxes. In this document, the individual ways to add items using the web module will be discussed.

### Add Item

The most common process for adding new items is to use the Add Menu option. To select this option click the **Add > Item** menu option (Fig. 1).
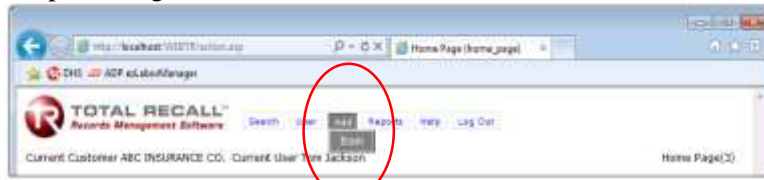


*Fig 1*

The Add Item screen is displayed which will enable the user to add items for the eligible item type selected, department (if applicable) and the Authorized Contact selected (Fig. 1).



*Fig 2*

**Item Type** – Select the type of item to be added.

**Department** – This dropdown is available if the customer is departmentalized, and the user has access to multiple departments. This dropdown will list the available department(s) to which the user has access. If the selection in the main module is *Department Required* is selected, the user **must** select a department to add items to the web order. If the customer is non-departmentalized this dropdown will not appear.
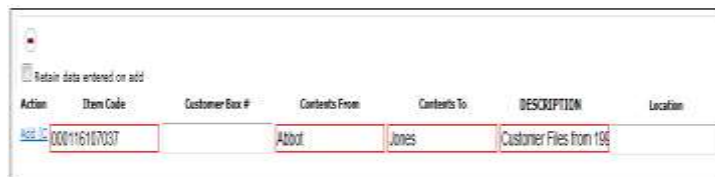
**Requested For** – Use the dropdown box to select the appropriate user for which the items added to the order will be requested.

## Add Item Data Entry

Items can be simply and quickly added to the web order by filling in the appropriate fields for the item type selected. The eligible item types and fields as well as valid data entry specifications (i.e. field captions, minimum field lengths, maximum field lengths, unique values, and other format requirements) can vary by customer, department and/or item type.

Fields outlined in **Red** indicate that the field is editable and can accept data entered into it.

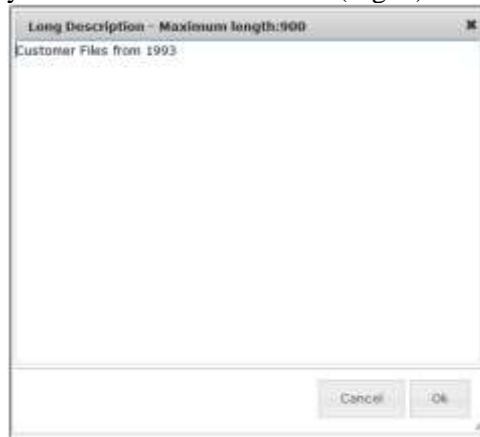In the example below, all reference fields visible on the web are eligible for data entry (Fig. 2).



*Fig 3*

Place the cursor in the first available data entry field (outlined in **Red**) and enter the relevant data for that field. Press the <Tab> button on the keyboard to move to the next available field.

When tabbing into the Reference 10 field (called "DESCRIPTION" in the example above), the Long Description text box will open up. This window will allow entering text into the reference field that would not easily be displayed in the small readable field displayed on the Add Item screen (Fig. 3).



*Fig 4*

Enter in the appropriate long description for the reference filed in the box provided.

Press the **<OK>** button to add the text to the item at this time.

Press the **<Cancel>** button to discard the data entered. No Long Description will be saved into the reference field at this time.

When entering data into a reference field that has been specifically formatted as a Date field (*i.e.* **From Date**, **To Date**, **Expire Date**, **Review Date**, *etc.*) a calendar will be displayed under the field (Fig. 4).



*Fig 5*

By default, today's date is selected on the calendar.

   Use the **<Prev>** arrow to move the date back one (1) month.

   Use the **<Next>** arrow to advance the date one (1) month.

Use the Month dropdown box to select the month value January (Jan) through December (Dec)

Use the Year dropdown to select a different year in the past or in the future.

   Click on the Add link in the **Action** column to the left of the line item to add the item to the web order (Fig. 5).



*Fig 6*

The added item is listed below the Add line. Once the line is listed below, the Items on Order count is increased by one (1) record (Fig. 6).



*Fig 7*

If the Item Code entered on the Add line is invalid, a Message from Webpage is displayed (Fig. 7).
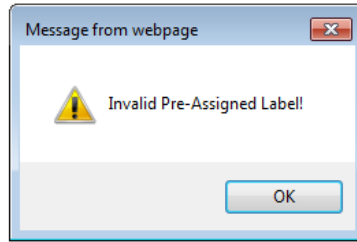


*Fig 8*

Press **<OK>** to continue and enter in another Item Code.

If the Item Code entered in the Add line has already been added to a web order in a Message from webpage is displayed (Fig. 8).
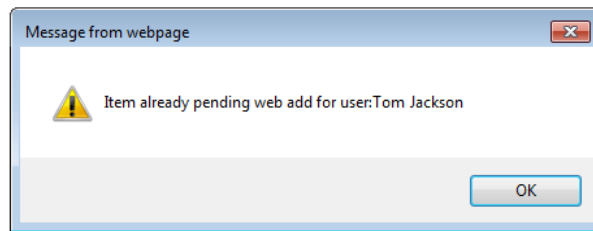


*Fig 9*

Press **<OK>** to continue and enter in another Item Code.

If the Item Code entered in the Add line has already been added to inventory in the system a Message from webpage is displayed (Fig. 9).
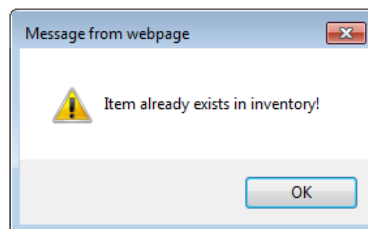


*Fig 10*

If invalid data is entered into a reference field(s), a Message from webpage is displayed (Fig. 10).



*Fig 11*

The reference field is listed and the data entry rule is displayed, indicating which field is in violation of the reference field rules settings.

The **Retain data entered on add** option will retain all reference field data entered in the current reference fields for each item added to the web order. As items are added to the list, the reference fields for the new item added will contain the same information as the original item to facilitate data entry (Fig. 11).



*Fig 12*

## Editing Items on the Add Screen



Items added to the list can be edited by using the Edit link in the Action column to select the item in edit mode (Fig. 12).



*Fig 13*

Place the cursor in the reference field to be edited (outlined in **Red**) and enter the updated data for that field. Press the <Tab> button on the keyboard to move to the next available field.

As data is entered in the field, the last saved data value is displayed in the view box that displays below the selected field.

**Save**  Press the Save link to save the update the selected record.

**Cancel**  Press the Cancel link to discard the updates without saving to the record.

*Removing Items From the Add Screen*

**Remove**  Items can be removed from the Add Item screen and from the web order by using the Remove link in the Action section to the left of the item in the list.

The item is removed from the list below the Add line. Once the line is removed from the list, the Items on Order count is reduced by one (1) record

## Adding Files to Boxes on the Web

Files can be added to their parent box from the View Order(s) screen. From the Add Items screen, use the View Order(s) button in the Command Bar to access the View Order screen (Fig. 13).



*Fig 14*

The View Orders screen will list all items that have been added to the order from the Search menu or the Add menu (Fig. 14).



*Fig 15*

Use the **Add Multiple Items** button in the results grid to add files to a box (Fig. 15).
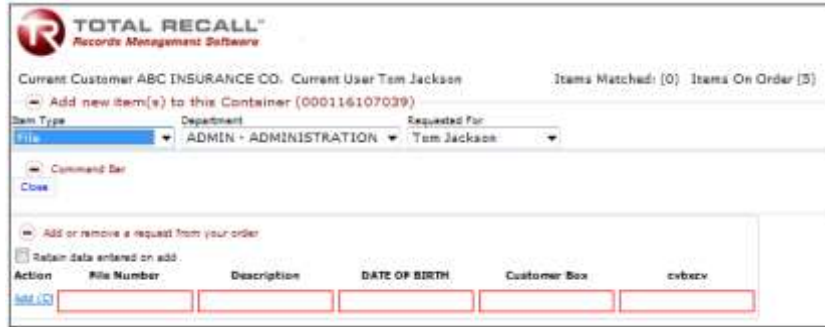
*Fig 16*

Select the Item Type, applicable Department and the individual for which the non-indexed items will ultimately be retrieved. Enter values in the available reference fields for the item type chosen. Once finished, use the Add link in the Action section to automatically add the indexed item to the web work order.

The **Retain data entered on add** option will retain all reference field data entered in the current reference fields for each indexed item added to the order. As items are added to the list, the reference fields for the new item added will contain the same information as the original item to facilitate data entry.

After each file has been added to its parent box, the Item On Order count is increased by one (1) record (Fig. 16).



*Fig 17*

After each file has been added to its parent box, the Item On Order count is increased by one (1) record (Fig. 17).
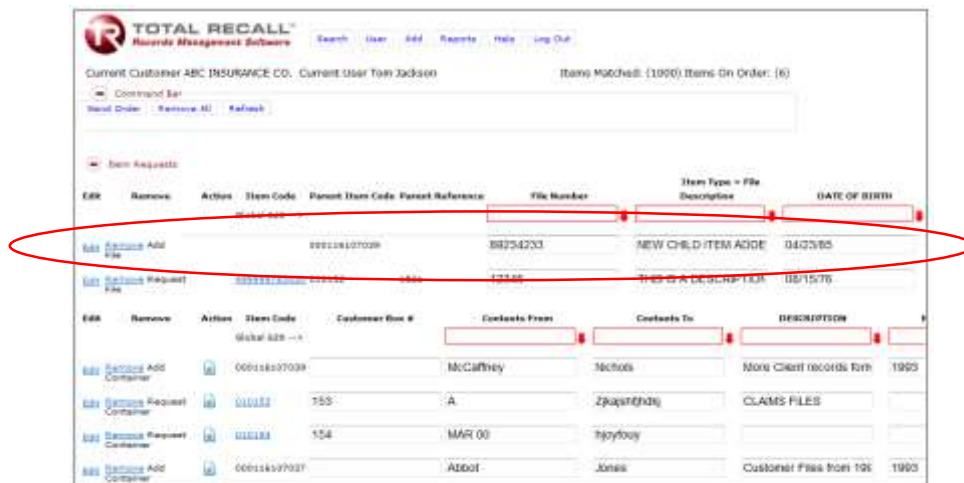


*Fig 18*

The new file is listed on the order as an *Add* line item.

## Non-Indexed Add and Retrieve

A **Non-Indexed Add and Retrieve** is actually a search for a file located in a parent box where the file has not yet received a bar code. In order to do a non-indexed add and retrieve, first search for the parent box.

Use the **Add Non-Indexed Item** button in the results grid to add non-indexed items to the parent box (Fig. 18).



*Fig 19*

Select the Item Type, applicable Department and the individual for which the non-indexed items will ultimately be retrieved. Enter values in the available reference fields for the item type chosen. Once finished, press the Add button to automatically add the non-indexed item and the retrieve action for the item to the web work order.

The **Retain data entered on add** option will retain all reference field data entered in the current reference fields for each non-indexed item added to and requested on the order. As items are added to the list, the reference fields for the new item added will contain the same information as the original item to facilitate data entry.

Only boxes that are currently in inventory at the time the results are returned by the Search performed are eligible for adding Non-Indexed items to and requesting Non-Indexed items from a box.

## Adding Files to Existing Boxes

Adding multiple files to an existing box is actually performed by searching for the parent box using either the *Search > Quick Search* or the *Search > Advanced Search* menu options. Adding files in the manner described in the following examples will add the file to the parent box without also retrieving the file, as described in the previous section concerning non-indexed add and retrieve. In order to add multiple files to a box, first search for the parent box.

Use the Add Multiple Items button in the results grid to add files to the parent box (Fig. 19).

*Fig 20*

Select the Item Type, applicable Department and the individual for which the non-indexed items will ultimately be retrieved. Enter values in the available reference fields for the item type chosen. Once finished, press the Add button to automatically add the indexed item to the web work order.

The **Retain data entered on add** option will retain all reference field data entered in the current reference fields for each indexed item added to the order. As items are added to the list, the reference fields for the new item added will contain the same information as the original item to facilitate data entry.

Only boxes that are currently in inventory at the time the results are returned by the Search performed are eligible for adding files to the parent box.