

SEARCHING AND ACCESSING INVENTORY

Searching Inventory

Overview

There are several ways to search for items using the web Module: Quick Search, Advanced Search, Item Search, and Hierarchical Search. These selections are accessed by selecting the **Search** menu option, and choosing from the drop down menu (Fig. 1).

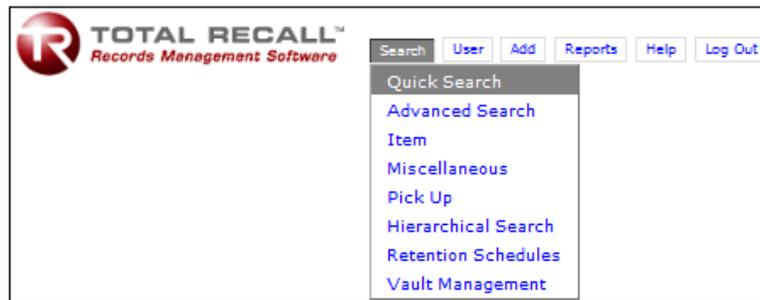


Fig 1

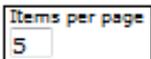
Performing a Quick Search

From the Quick Search menu option, users can build searches to return results that match the search values entered to the screen for further processing (Fig. 2).



Fig 2

Select the Item Type, the Department to which the item(s) searched for belong, the order in which the results returned are listed and the number of items to display per page. Depending on the Item Type selected, relevant reference fields and their appropriate captions will be made available below to be used for building the Search.



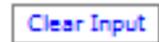
Use the **Items per page** setting to restrict or increase the number of results that will be displayed on each page.

After building the search, The Command Bar provides controls for processing the current search, clearing the current search input values, performing a new search, clearing the current results or viewing the current users order(s) (Fig. 3).

The Command Bar



Fig 3



Clear Input – Press the <Clear Input> button to clear the query data only.



Search – Press the <Search> button to search for more records. The results of the search will append to the results of any previous searches currently listed on the screen.



New Search – Press the <New Search> button to search for different records. The results of the search will be displayed in the results section below. Results of any previous searches will be removed from the screen.



Clear Results – Press the <Clear Results> button to clear the result data only.



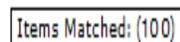
View Order(s) – Press the <View Order(s)> button to the View Order screen to view any orders that are in a pending send status.

In Fig. 3 above, the Item Type *Container* was selected for the *Admin* department. The Search has been built to return all records whose *New Caption 1* (Reference 5) begin with “0001” (Fig. 4).

The Query Results

Item	Item Type	Item Code	Customer Name	Contract Name	Contract To	RESERVED	NEW CAPTION 1	DATE OF SIGN	Department	Revision Date	Print Date
0001	Container	000001					000100		ADMIN	04/28/2011	
0002	Container	000002					000101		ADMIN	04/28/2011	
0003	Contract	000003	BARTRICK	DOUGLAS	CONTRACTS		000102		ADMIN	04/28/2011	12/31/2009
0004	Contract	000004	PHILLIPS	RICHMOND	CONTRACTS		000103		ADMIN	04/28/2011	12/31/2009
0005	Container	000005					000104		ADMIN	04/28/2011	

Fig 4



After searching for results, the **Items Matched** count in the Current Login Information section at the top of the Search page will indicate the total count of items that match the search criteria.

With the Search results returned, the records can be updated, non-indexed items can be added to the boxes and requested for delivery (if applicable), images uploaded and stored for the item, item history can be previewed and the long description, indexed notes and memo fields can be viewed (if applicable).

Display Long Description – This option, when selected, will display the long description found in Reference 10 for each item in the result set (Fig. 5).



Fig 5

Items that are currently in the storage facility are eligible for delivery back to the requestor. Items that are currently out of storage (or have been removed from inventory) cannot be selected for delivery to the requestor. Using the Requested Action options, the web client user can select either **Delivery**, **Pick Up** or **Remove** accordingly (Fig. 6).



Fig 6

Editing Query Results



Select the **Edit** option next to an item in the results grid to edit the applicable fields for the selected item type. Fields that are eligible for editing on the web are outlined in red or are displayed with a dropdown selection box to indicate that another value can be selected from the predefined list (Fig. 7).



Fig 7

Use the **Save** option to update the changes to the edited item (Fig. 8).

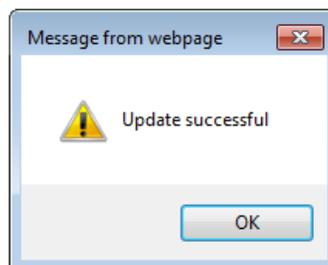


Fig 8

Selecting Query Results

Items can be selected for action by using the check box in the Select column, if that item is eligible for the Action selected (Fig. 9).

Edit	Select	Detail	Item Code
Edit	<input type="checkbox"/> Retrieve		010152
Edit	Pending Send Order for ABC001		010153
Edit	Pending Send Order for ABC001		010154

Fig 9

If an item is not eligible for the action selected, the reason for the item's ineligibility is listed. Items would be considered ineligible for action on the web if the item is already Retrieved, has already been Refiled or if the item is currently in a pending action.

Items On Order: (2)

As items are selected for action on the web, the items are added to the current user's web order. The **Items On Order** count in the Current Login Information section at the top of the Search page will indicate the total count of items that have been added to the current web user's order.

View Item History



The **Item History** button will display the Item History report. This report shows all the work order activity, dates, Requested By and notes associated with the recorded action (Fig. 10).

TOTAL RECALL [™] Records Management Software						
Item History Report (23446234)						
Work Order	Action	Date	Requested For	Requested By	Comments	
0001531	Refile	06/09/2011	Tom Jackson	Tom Jackson		
0001438	Retrieve	05/06/2011	Tom Jackson	Tom Jackson		
0001427	Refile	05/03/2011	Tom Jackson	Tom Jackson		
0001334	Retrieve	03/30/2011	TOM JACKSON	Tom Jackson		
Batch	Action	Date	Requested For	Requested By	On Site Name	On Site Location
0000048	Custody Change	01/17/2011		TOM JACKSON	TOM JACKSON	
Work Order	Action	Date	Requested For	Requested By	Comments	
0001161	Refile	12/09/2010	DEB MILNER	DEB MILNER		
0001182	Retrieve	11/25/2010				
0001152	Add	11/25/2010				
0001125	No Action	11/15/2010	JOHN SMITH	JOHN SMITH	Unassigned storage item has been added to inventory.	

Fig 10

Item Description, Indexed Notes and Memo Fields

[010152](#)

Click the **Item Code** link to display the Long Description, Indexed Notes and Memo filed for the item (Fig. 11).

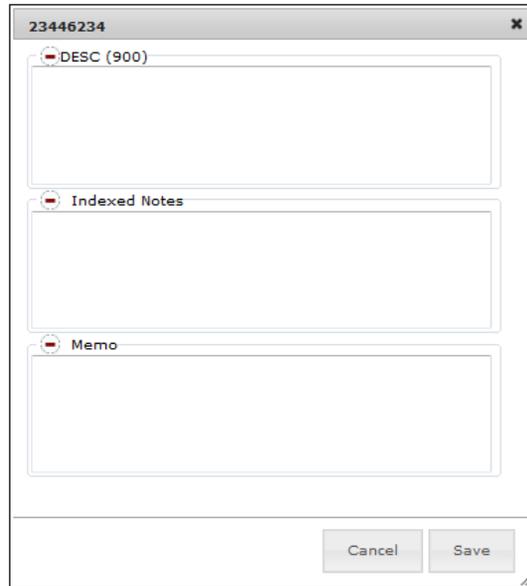


Fig 11

Press the Save button to update the Long Description, Indexed Notes and Memo fields.

While editing an item, tabbing to or placing the cursor into the Description field will automatically display a similar interface in which to view, add or edit the item's Description (Fig. 12).

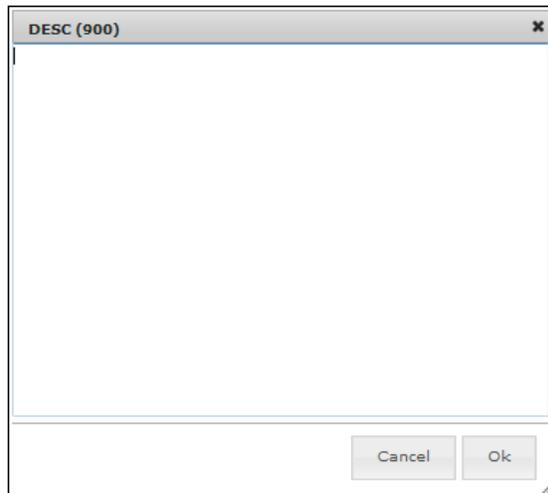


Fig 12

Once the cursor is in the Description field in edit mode, type the updated description or edit the current description in the box provided and press the OK button to save.

Exporting Results

Results from the Quick Search features of the Web module can be exported to Microsoft Excel® files or to comma delimited text files. Using the Export options next to the Requested Action buttons, select either **Excel Export** or **Text Export** to export the results (Fig. 13).

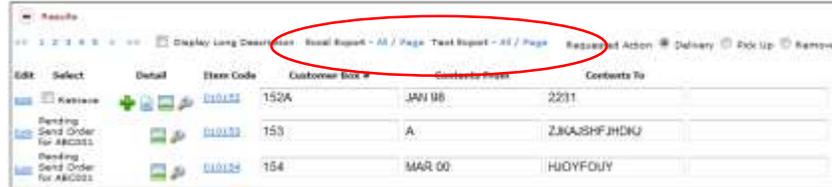


Fig 13

Export to Excel

Select the appropriate Excel export option, either **All** or **Page**. Exporting **All** will export all results returned by the current search, as calculated in the **Items Matched** count in the Current Login Information section. Exporting only the **Page** results will only export the results currently listed on the page (Fig. 14).

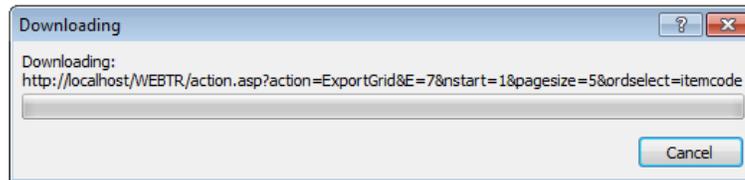


Fig 14

The Downloading progress bar will reach 100% and the file **action.xls** will be opened. Each record exported will be displayed on its own line. Reference value information will be listed in its own corresponding cell (Fig. 15).

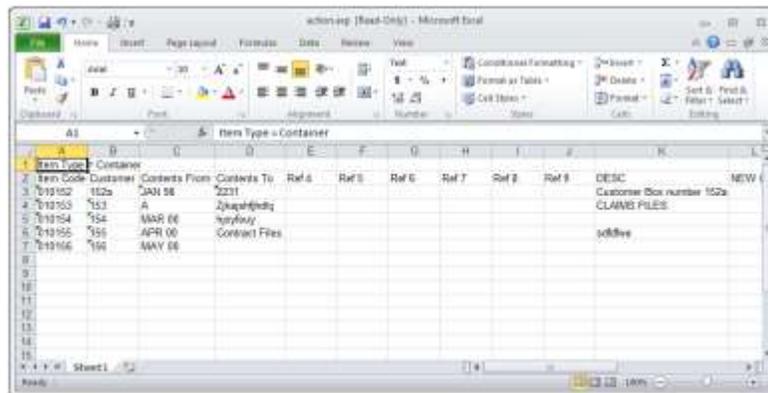


Fig 15

NOTE In order to export the query data to Excel the customer workstation must have a program capable of viewing files in .XLS format, such as Microsoft Excel®, installed and operational.

Export to Text File

Select the appropriate Text export option, either **All** or **Page**. The exported results will be displayed in a new internet browser window. Exporting **All** will export all results returned by the current search, as calculated in the **Items Matched** count in the Current Login Information section. Exporting only the **Page** results will only export the results currently listed on the page (Fig. 16).



Fig 16

Performing an Advanced Search

Similar to the Quick Search features in Total Recall SQL Web 10 is the **Search > Advanced Search** menu option. The quick search provides the web user with a user-friendly interface to perform more advanced searches based on the criteria provided (Fig. 17).



Fig 17

The Advanced Search screen provides options for selecting Item Type, Department, storage code and status of the item. Results can be ordered by a selected reference field and selected for a specific Authorized Contact (Fig. 18).

The screenshot displays the 'Advanced Search Criteria' form in the TOTAL RECALL Records Management Software. At the top, it shows the current customer as 'ABC INSURANCE CO.' and the current user as 'Tom Jackson'. The search criteria are as follows: 'of a specific type?' is set to 'Container'; 'assigned to a specific department?' is empty; 'of a specific storage type?' is empty; 'of a specific status?' has checkboxes for 'In', 'Out', 'permanently out', and 'Destroyed', with 'In' selected; 'Order By' is set to 'Item Code'; 'Requested For' is set to 'Tom Jackson'; and 'Items per page' is set to '5'. At the bottom, there is a section for 'Advanced Search Fields' with a table:

Reference	Operation	Status
Item Code	Equals	

Fig 18

Advanced Search Criteria

Specific Type – Select the web-enabled item type from the dropdown list provided

Specific Department – Select the appropriate department for which the Advanced Search should be built.

Specific Storage Code – Select the appropriate item storage code for which the Advanced Search should be built.

Specific Status – Select the appropriate item status for which the Advanced Search should be built. Choose either **In** (item is currently located at the storage facility), **Out** (item is currently retrieved and located at the customer site), **Permanently out** (item has been permanently removed from the system and is not currently located at the storage facility) or **Destroyed** (item has been destroyed from the system).

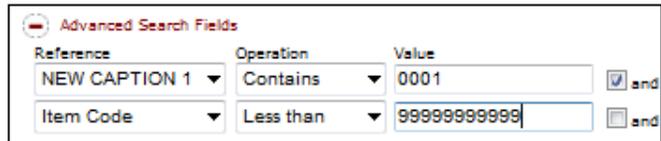
Order By – Select the appropriate field by which the results of the query should be listed

Requested For – Select the name of the individual for which any search result items will be requested when added to the order.

Items per page – Enter the number of records to be displayed on the page after performing the query

Advanced Search Fields

Search fields are defined by selecting a Reference field, a Boolean Operator (such as *equals*, *not equals*, *contains*, *greater than*, *less than*, etc.) and a Value. Use the And option to add another search field to build as complex or as simple a search as needed (Fig. 19).



Reference	Operation	Value	and
NEW CAPTION 1	Contains	0001	<input checked="" type="checkbox"/>
Item Code	Less than	9999999999	<input type="checkbox"/>

Fig 19

Use the Command Bar for processing the current search, clearing the current search input values, performing a new search, clearing the current results or viewing the current users order(s) (Fig. 20).



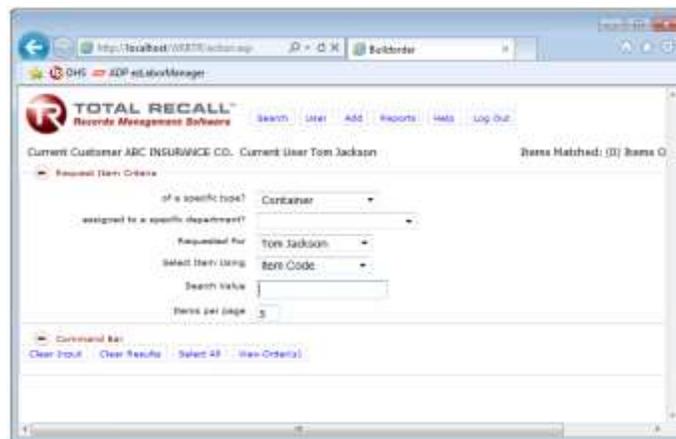
Command Bar				
Clear Input	Search	New Search	Clear Results	View Order(s)

Fig 20

The search results can be updated, viewed or managed in exactly the same ways as described in the Quick Search features.

Performing an Item Search

This search is designed to query items where the search criteria are known. Searches performed from this query must be exact searches. From the menu located at the top of the web page select, **Search** > **Item** from the menu. This will open the Item Search Screen (Fig. 21).



Current Customer: ABC INSURANCE CO. Current User: Tom Jackson Items Matched: (0) Items 0

Requested Item Criteria

of a specific type? Container

assigned to a specific department? Tom Jackson

Requested for Tom Jackson

Select Item Using Item Code

Search value

Items per page 5

Command Bar: Clear Input Clear Results Select All View Order(s)

Fig 21

Specific Type – Select the web-enabled item type from the dropdown list provided.

Specific Department – Select the appropriate department for which the Item Search should be built.

Requested For – Select the name of the individual for which any search result items will be requested when added to the order.

Select Item Using – Select the reference field to use when searching for the record(s).

Search Value – Enter the value of the reference field selected above to conduct the item search. Once this field is filled in, press <Enter> on the keyboard to initiate the search. Any result(s) returned from the Item Search will be appended to the results grid. The cursor will return to this field for the next input to be typed in.

Items per page – Enter the number of records to be displayed on the page after performing the query

Use the Command Bar for processing the current search, clearing the current search input values, performing a new search, clearing the current results or viewing the current users order(s) (Fig. 22).

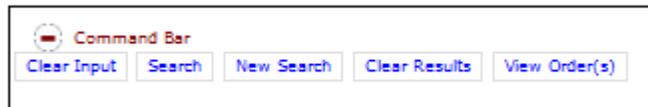


Fig 22

The search results can be updated, viewed or managed in exactly the same ways as described in the Quick Search features.