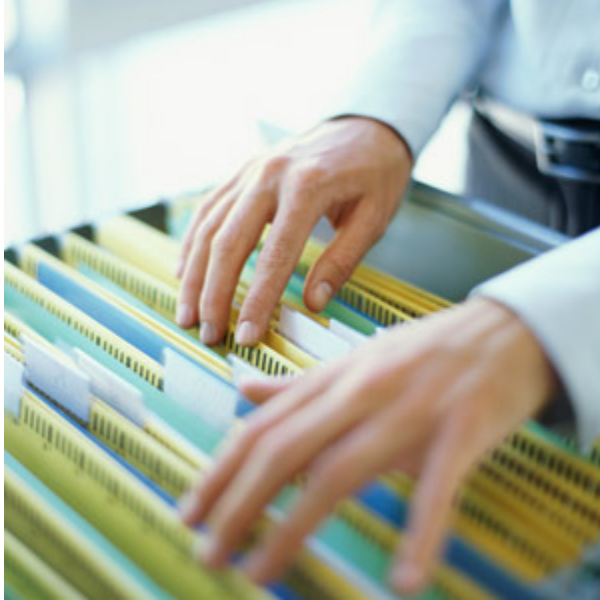


# The SIMPLE Records Manager



## User Guide

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## Chapter 1 Getting Started

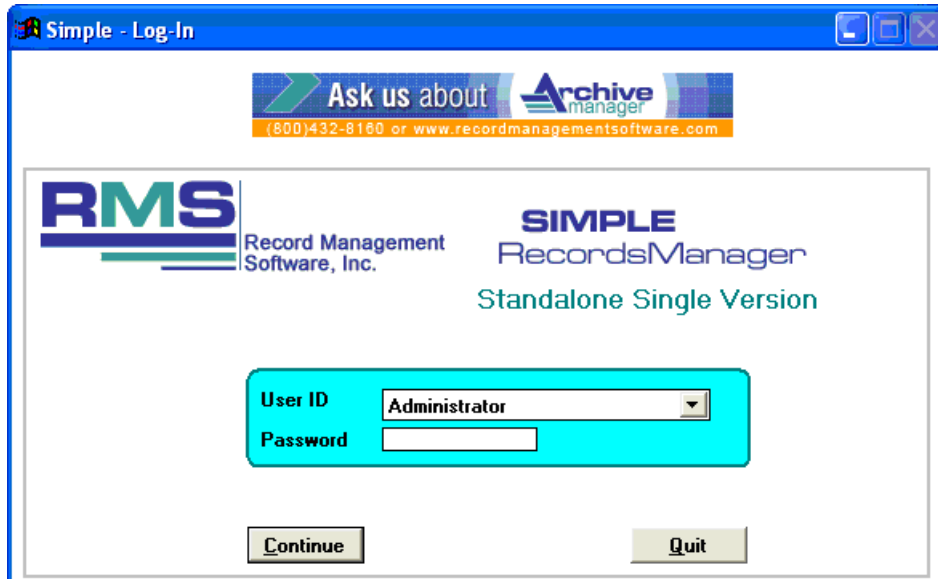
### Installation Options

The SIMPLE Records Manager can be installed for use on a stand alone computer or on a File Server (Network Server). See Appendix B for installation instructions.

- Stand Alone Installation** This installation implies operating on a Stand Alone PC, involving no network of any kind.
- Network Server** This option installs the SIMPLE Records Manager on the network server and runs the software in a network environment. This option allows the databases to be shared across the network enabling more than one computer to run the SIMPLE Records Manager simultaneously.

### Logging In

Double click the SIMPLE icon on the desktop to launch the SIMPLE Records Manager.



1. If this is the first time you are starting the software, select **Administrator** from the User Id pull down menu.
2. Enter **SIMPLE** for the password and click **Continue**.
3. If you have already setup your security features for the SIMPLE Records Manager, select your User ID from the pull down list.
4. Enter your password.
5. Click **Continue** to proceed to the Main Menu, or click **Quit** to leave the system.



For more information on setting up the security features of the SIMPLE Records Manager, see Chapter 11 Security Wizard.

It is important to exit the software by clicking **Finished** from the main menu or selecting **Program→Quit** from the top upper left menu. This properly closes the data tables and avoids data corruption.

## Date (Year) Entry

SIMPLE responds to entering the last two digits of the “year” by automatically adjusting to the full four digits reflecting the correct century. If you enter 01/01/00, SIMPLE automatically reformats the date to 01.01.2000. It also has retroactive logic to determine dates in the 1900’s. If you enter 12/31/98, SIMPLE automatically reformats the date to 12/31/1998.

The logic is “keyed” off of 1950, or more specifically, “50.” If the entered two digit date is UNDER 50 SIMPLE forces the year to 20xx. Likewise, if the date entered is over 50, it forces the year to 19xx.

SIMPLE does this only when adding a new record, meaning when **ADD** is clicked.

**EDIT** demands entering the full four positions of the year. This allows for entering a year that does not conform to the rule of “50” as described above.

For example, you want to have the From Date to be 1934. By entering “34” during the **ADD** process, the date will change to 2034 (because 34 is less than 50).

1. To enter 1934 save the record (with 2034).
2. Click **EDIT** and enter the full 1934 date.

The need to do either option is minimal as the rule of “50” works in 99.9% of the cases.

## On-line Help

The SIMPLE Records Manager comes equipped with an on-line help system for instant access to information as you work. Help provides a search engine for topics by keywords, and allows annotation of topics and creation of bookmarks. Access help by:

1. Choosing Help from the Program pull-down menu.
2. Pressing **F1** while using running the system.

## Where Shall I Start

The SIMPLE Records Manager assists in automating and streamlining your record keeping functions. It can organize your files, track your archival boxes and aid in establishing a corporate retention policy. But it cannot do any of this until you attend to some simple steps first.

## Step 1 — Change the Field Names on the File and Box Information Screens

This causes you to plan how to use the various fields and plan exactly what information will be stored. It is very common to rush into entering information into what seems like the most logical fields. And then determine a better way – which could send you back and starting all over.

A little planning goes a long way.

Refer to Chapter 10 and proceed to rename your fields.

**COMPANY and DEPARTMENT Fields**

Company and Department fields are special fields designed to help profile your organization. The system is designed to organize information pertaining to each of your operating units. The higher of the two levels is "Company" and the lower level is "Department".

Do not use these fields for a totally different purpose. All of the reports are linked to these two fields, as are all of the sorted records.

You can change the names of these two fields to better reflect your organization. As an example, you might call the higher level (which we refer to as "Company") Division, Agency or City. You might call the lower level (which we call "Department") Office, Branch, etc.

Changing the names does not change how the computer uses these fields.

**DATE Fields**

On both the File and Box Information Screens there are four date fields which called Date Received, Beginning Date, Ending Date and Destroy Date. The first three can be used to record any date of your choosing. The last field (Destroy Date) is the field into which the system calculates and saves the date the Box can be destroyed.

For example, to enter personnel information you might want to rename the first field to "Date Hire", the second field to be "Date Terminated" and the third field to say "Birth Date".

Do not change the name of the Destroy Date field.

**Other Fields**

Proceed to rename the remaining fields at this time. Remember, you can always return to the Box and File Setup Screen and change the names later.

**Step 2 — Enter Master Information**

There are four master files that can be established.

An arrow is located to the right of the Company, Department, Record Title Code, and Box Size Code fields. When clicked, a pull down menu appears containing all the valid choices relating to each of those fields. Until the master information is entered the menus are empty.

**COMPANY**

As previously mentioned, this is the higher of two levels of organization. The Company text field with a maximum 10 characters. It is small because the actual name is in the master file.

Proceed to Chapter 10 to enter your Company information.

**DEPARTMENT**

This is the lower of two organization levels. The individual Departments are directly linked to the associated Company. The button for entering a new Department appears on the right hand side of the "Company" screen.

After entering and saving the first Company record click on the Department Master button and another screen appears. On this second screen you can

enter the Department associated with that company.

Proceed to Chapter 10 to enter your Department information

**BOX SIZE  
CODES**

Use this field to describe the various size containers used. For example, they may be referred to as STD (Standard 10x12x15 box), TRAN (transfer cases), CKS (check size boxes), BLP (blue prints), etc.

Proceed to Chapter 10 and enter your Box Size Codes.

**RECORD  
TITLE CODES**

Use this field to enter your Retention Information. If you have an existing Retention Schedule you will find it very easy to relate your information to the fields on the Retention Information Screen and can proceed to enter your Schedules.

If you do not have an existing Retention Schedule you may want to defer this to a later time. You DO NOT need to have a Retention Schedule to begin entering your File and Box information. Many companies have found that it takes months (and even years) to establish a viable Retention Policy during which time Files and Boxes still need to be catalogued and tracked.

If you do not enter a Retention Schedule at this time you have three options as it relates to calculating destroy dates for your archival Boxes.

- Manually enter a Destroy Date into the field as each Box is entered
- Leave the Destroy Date field empty and the system will automatically set each Box to a “permanent” Destroy Date
- Or, do either option above, and after you enter a Retention Schedule, click Recalculate Destroy Date and let the system recalculate the dates using the current Retention Schedule.

Refer to Chapter 5 Retention Information, to enter Retention Information.

### Step 3 — Order File and Box Labels

It is never too early to start putting bar code labels onto your files and boxes. Many companies defer labeling until they have a need to use a bar code reader, only to discover they have thousands of files to retroactively label. It costs very little to put a bar coded label on a file or box as it is being filed away (or being Checked Out or In). Carefully think through the process and consider ordering a sufficient quantity of file and box labels.

To Order Labels contact RMS at [support@recordmanagementsoftware.com](mailto:support@recordmanagementsoftware.com) or 914.725.5900.

### Step 4 — Pick a Test Case

You are now ready to start entering your file and box information. Before you commit yourself to hundreds and even thousands of records, choose one department or one type of record as a test case.

Enter 30 to 50 records to determine the viability of the fields and the related information. Print test reports and perform searches to see how easy (or hard) it is to find typical department information.

WHEN ALL ELSE FAILS: enter the information into the memo field. The information is in the

system and can always be Key Word Searched. *Never, leave out something important just because you can't decide which field to enter it into.*

Similarly, the expanded text field can be used in very creative ways.

For example, someone created a document using Microsoft Word. You can open the original document, highlight the text and copy it into the Window's clipboard. Then enter the Simple Records Manager, position yourself in the Memo Field for that file, and paste the entire document into the Memo Field (Expanded Text). Having done so, each and every word is Key Word Searchable.

## **Step 5 — Revisit Your Field Names and Make Adjustments**

After working your way through the test case you may need to revisit the field names, make changes as needed, and edit the records that have already been entered.

## **Step 6 — Conversion Services or Manual Entry**

You are now ready to move ahead and enter your company information into the system.

If you have existing computer records you may want to consider having us convert it into the SIMPLE databases. We perform this service for hundreds of companies.

Provide us with file and box information in an Excel worksheet, ASCII *delimited format* or Microsoft Access or SQL Server format. Send it to us as an e-mail attachment, i.e. a compressed file , or send the information on a CD. Have your Technical Support personnel contact us at [support@recordmanagementsoftware.com](mailto:support@recordmanagementsoftware.com) or call us at 914.725.5900 to work through the details and receive a current price quote.

You can now start the process of manual data entry. The version of the software licensed (Single User or LAN Version) determines how many individuals can be put to this task.

The LAN Version allows as many individuals doing the data entry as you have stations for them to work on. Everyone can enter records at the same time.

The Single User Version limits data entry to one person.

## **Step 7 — Implementation**

During the information gathering stage, begin the process of introducing the software to the various departmental managers. Show them samples of the reports they can expect to receive, how to interface with the computer, and other aspects of the system.

During this early stage of using the software start thinking about how the software and your existing manual procedures blend together. You'll look at your manual procedures relating to files and boxes coming in, being requested and checked out and back in, how files are moved to boxes for long term storage, how you interface with your offsite storage facility, to name a few issues.

Implementing the SIMPLE Records Manager is not an EVENT — it is a PROCESS. It takes time

to transition from familiar manual procedures to the automated system. Don't rush it. It takes time for each piece to fit together.

## Other Considerations

There are two other add-on modules to assist in making your records center run with a high degree of productivity.

### Microfilm Add On Module

This highly automated process tracks rolls or cartridges of film. It also tracks the individual images/blips on each roll/cartridge.

See Chapter 14, Microfilm Module.











### Portable Bar Code Reader

The second module relates to using a bar code reader that is more flexible. You can carry it with you to the location where the files, boxes, and microfilm are stored. Portable Bar Code Readers are approximately the size of a television remote control and are light weight.

See Chapter 13, Portable Module.

## Understanding the Buttons

The buttons below represent the standard interface buttons found on many of the screens throughout the software. The buttons function the same way on all of the screens.

	Go to the first record in the database.
	Go to the previous record in the database.
	Go to the next record in the database.
	Go to the last record in the database.
	Display a browse window that allows you to choose which record you want to view, edit, or delete.
	Click to add a record into the database. After clicking, the cursor moves to the first field on the screen and is ready for you to enter the information.
	Click <b>Save</b> to save your changes, when editing or adding a record.
	Click <b>Edit</b> to edit an existing record in the database. The cursor moves to the first field on the screen and is ready for edit.
	If you are editing an existing record, click <b>Cancel</b> to cancel your changes. If you are adding a record, press this button to not add the record to the database.
	Click <b>Delete</b> to delete the current record from the database.



Print a basic report without the expanded options from the Reports Menu on the Main Menu.



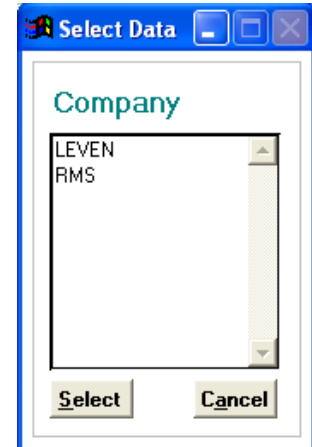
Return to the Main Menu. Click **Close** when you are finished with what you are doing.

## Fast Data Entry

Throughout the system, notice the up arrow, and in some cases, the down arrow. Depending on the current field, the system allows you to select from a list of user defined entries.

### Company

When a field allows you to enter a company name, you can click the up arrow to quickly select from a list of valid entries. For more information on setting up your list of valid company entries, refer to Chapter 10, Software Setup.



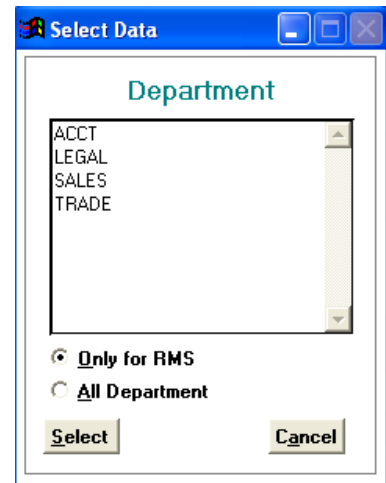
### Department

When a field allows you to enter a department name you can click the up arrow to quickly select from a list of valid entries. This screen also allows you to view the departments for a specific company, or all the defined departments.

For example, if you select the company "RMS", and then use the up arrow to select a department, you have the option of seeing only the departments associated with "RMS" or of seeing all departments.

For more information on setting your list of valid Company

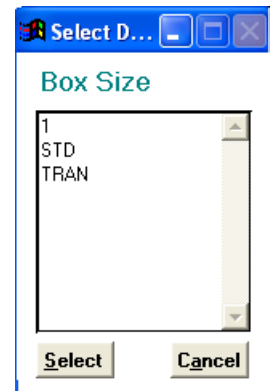
entries, refer to Chapter 10, Software Setup.



### Box Size Codes

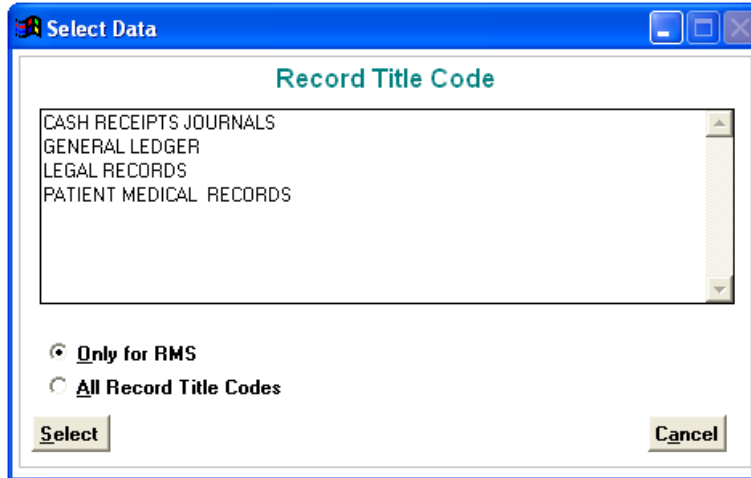
When a field allows you to enter a box size code, you can push the up arrow to quickly select from a list of valid entries.

For more information on setting your list of valid Box Size Code entries, refer to Chapter 10, Software Setup.



## Record Title Codes

When a field allows you to enter a record title code you can click the up arrow to quickly select from a list of valid entries. This screen also allows you to view the record title codes for a specific company and department, or all defined record title codes.

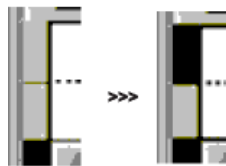


For example, if you select “RMS” for the company and “ACCTG” for the department, and then use the up arrow to select a valid record title code, SIMPLE gives you the option of just seeing record title codes that are in the Company “RMS” and Department “ACCTG”.

For more information on setting your list of Retention Codes, please see Chapter 5 Retention Information.

## Browse Window

Browse windows appear throughout the program. This special window lists records. Below is a close up of the left side of a browse window. Note the narrow gray boxes on the image on the left.



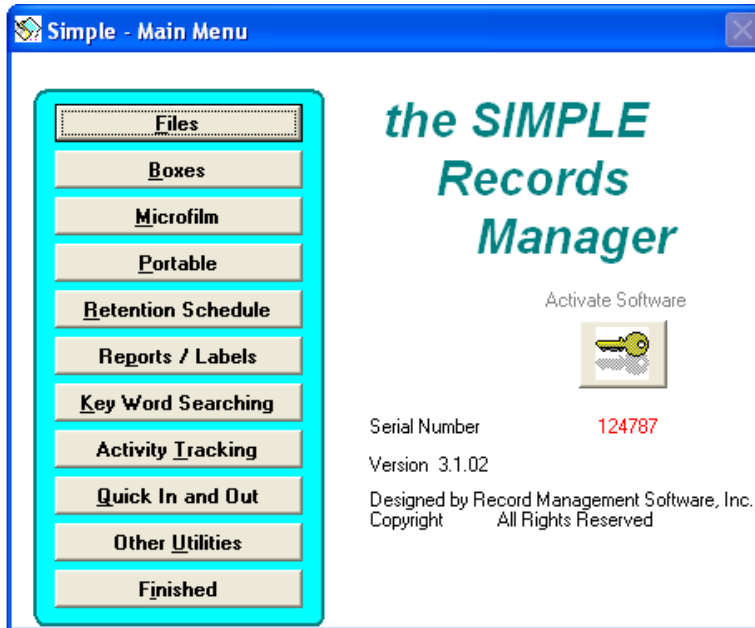
You may edit the data contained in any or all the fields, by highlighting and typing over the existing data.

Close this window by pressing **ESC** or by clicking the “x” in the upper left of the Browse Window.

## Menus

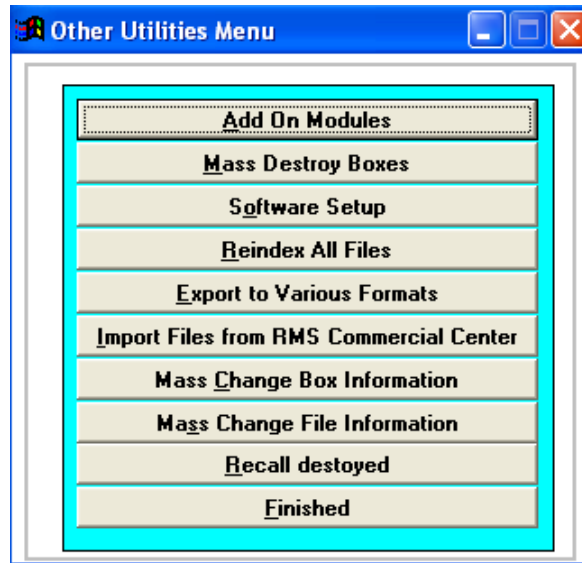
The major functions of the system can be reached directly from the **Main Menu**. **Other Utilities** allows access the less frequently used features, such as Software Setup. This manual walks you through the menus feature by feature.

## Main Menu



**Note:** Microfilm and Portable are *optional purchase* modules and are covered in Chapter 13 and Chapter 14.

## Other Utilities Menu





## Chapter 2 Registering/Activating the Software

### Enter company information

1. From the **Main Menu** choose **Other Utilities**.
2. Select **Software Setup** and then **Company Information**. Here you may enter the data regarding your entity.

the SIMPLE Records Manager

### Company Information

Company

Address

Address

City  State  Zip

Country

Contact

Telephone  FAX Number

Email

3. Enter the required information and click **Register**.

### Activating the Software

1. Before clicking **Activate Software** from the Main Menu, e-mail us at [support@recordmanagementsoftware.com](mailto:support@recordmanagementsoftware.com) the serial number from the main menu page.
2. Upon receiving your activation code, you are ready to unlock the SIMPLE Records Manager.
3. From the **Main Menu**, click **Activate Software**.
4. Enter the numeric activation key that Record Management Software, Inc. has provided and click **Activate**. If the activation key is entered properly a message appears in the upper right hand corner that says the software has been activated.

Activate Software

Serial Number

Activation Key

## Chapter 3 File Information

### File Information Screen

File Information focuses on collecting and viewing information about a single file. This screen includes key fields used for instant access to information. A memo field, which is key word searchable, is used to enter an unlimited amount of information pertaining to the individual file.

**the SIMPLE Records Manager**

**File Information**


File Number

Company  ↑  
 Department  ↑

File Is  On   
 To Whom

File Date  /  /  Destroy Date  /  /  File Location   
 From Date  /  /  To Date  /  /  F2 - Remembers Key Fields  
 Major  F3 - Refresh Key Fields  
 Minor  Box Number   
 Matter No.  Id No.  Box Location

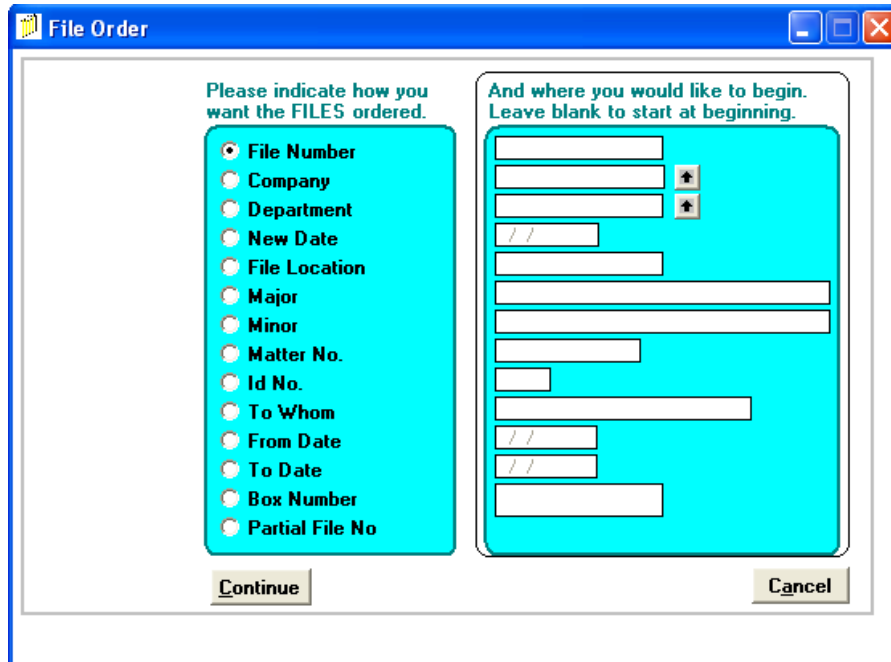
Top Prev Next End Locate Add Edit Delete Print Close  
 Check File Out Wait List See File History Pre-Print File Labels  
 Check File In

 **Note:** SIMPLE allows you to change the names of the fields on the File Information screen. This manual refers to each field by its original field name.

### Locate a File

This screen allows you to select the order in which you see the information on the File Information Screen.

1. Click **Locate** from the File Information screen.



2. Select the display order by clicking the radio buttons on the left.
3. Enter key information to start the search.

For example, if you want to see the information by File Number, starting at file number 95081, select File Number using the radio buttons, and enter "95081" into the field.

4. After making your selections click **Continue**.

FILE NUMBER	EXPANDED TEXT	FILE LOCATION	MAJOR	NEW DATE	TO WHOM
1206	Memo		SNYDER INDUSTRIES	05/01/2002	
1207	Memo		ROCHESTER MANUFACTURING	//	
1208	Memo		ROCHESTER MANUFACTURING	//	
1209	memo		FRANKLIN CORP	//	
1212	memo		ROCHESTER MANUFACTURING	//	CHARLIE HAYES-DAVEN
1215	memo		ACME	04/28/2002	
1355	memo		ROBERTSON INDUSTRIES	03/05/2006	
1356	memo		ROBERTSON INDUSTRIES	03/05/2006	
1400	memo		FRANKLIN CORP	//	
1401	memo	FILECAB6	ALLSTATE	//	
2023	memo		FRANKLIN CORP	//	
2098	memo		ALLSTATE	//	
2341	memo		FRANKLIN CORP	//	
4321	memo		LEGAL FILES	01/01/2007	
101-1	memo		ROCHESTER MANUFACTURING	//	
101-2	memo		ACME	04/28/2002	GARY MILLER
14320	memo		FRANKLIN CORP	//	

A browse window (as depicted above) appears. This gives a list of files to choose from.

5. Click on the file you want to view and close the browse window. After the browse window closes, the selected record appears on the screen for view, edit or delete.
6. You can use the mouse to move up and down in the browse window and then click on the file you want presented.

7. To close the browse window click on any part of the File Information Screen outside the browse window or click **Esc**. You then return to the regular screen with all of that file's information presented.
8. Use **Top**, **Prev**, **Next**, and **End** to navigate forward and backward through the files.

### Add a File

1. Click **Add** from the File Information Screen. The cursor appears in the File Number field.
2. Type in the information and click **Save** when you are finished. To cancel your add click **Cancel**.

### Edit a File

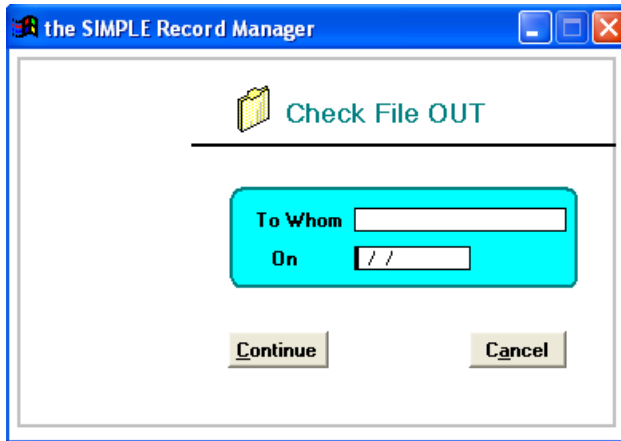
1. Click **Edit** from the File Information Screen.
2. Use the mouse and/or **Tab** key to move between the fields you want to change.
3. To save your changes, click **Save**. To cancel your changes click **Cancel**.

### Delete a File

1. Click **Delete** from the File Information Screen. This deletes the file you are currently viewing.

### Check File Out

1. Click **Edit** to perform this function.

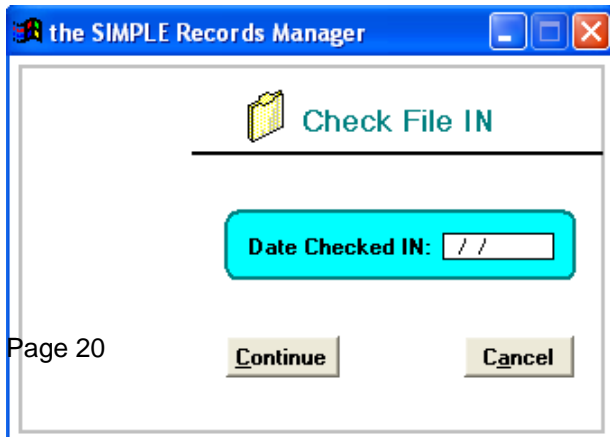


The prompt on the face of this button changes based upon the status of the file. If the file is checked out the button displays "Check File In". Likewise, if the file is currently in, the button displays "Check File Out".

2. Find the File that you want to check out and click **Edit**.
3. Click **Check File Out**. Enter the name of the individual (or company) to whom the file is being sent and the date the file is being checked out.

### Check File In

1. Click **Edit** to perform this function.

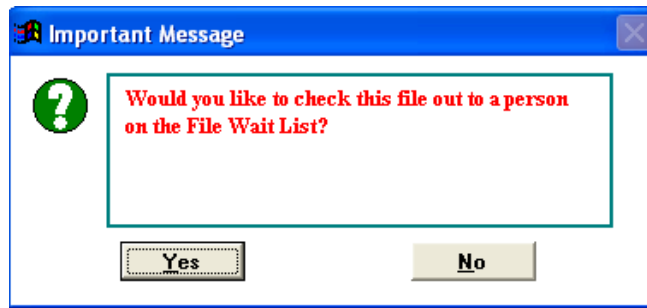


The prompt on the face of this button changes based upon the status of the file. If the file is checked out the button displays "Check File In".

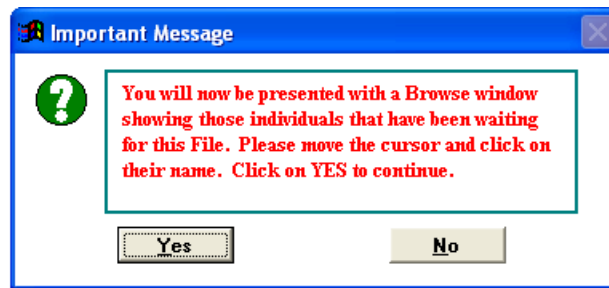
Likewise, if the file is currently in, the button displays “Check File Out.”

2. Find the File that you want to check In and click **Edit**.
3. Click **Check File In**.
4. Enter the date that this file was returned and click **Continue** to check the file in.

If there are individuals that are waiting for this file you can recheck the file out to a person on the Wait List.



5. If you answer **Yes** to this question this screen appears.



6. After clicking **OK** a browse window appears allowing you to select which individual you want to recheck this file out to.
7. To see any notes regarding this request double-click the mouse, the word Memo is located the in Notes column. (A lowercase m in memo reflects that the Memo field was not completed.)
8. When you are finished reading the notes click **Esc**.

Locate Record						
	Person Requesting File	Company	Department	Date Requested	Notes	Phone
	john smith	RMS	LEGAL	02/20/2013	memo	(617)876-5437
	jane youngman	RMS	SALES	01/30/2013	memo	(617)987-6549

9. After selecting the individual to recheck this file out to, close the browse window by clicking **Esc**. The Check Files Out screen appears again with the information for that individual. From there you can recheck the file out.

## Wait list

1. From the File Information Screen select the file that you want to see the wait list for and click **Wait List**.
2. Use this screen to enter the individuals that are requesting this file.
3. You can add an individual to the wait list or change information regarding a specific request.

## See File History

From the File Information Screen click **See File History**. A Browse Window displays showing the file's entire check out history: to whom the file was checked out, how long it was out, and when it was returned. If a file is currently checked out it does not appear on this list until it is checked back in.

	Date OUT	Check Out To	Date IN	Days
	06/01/2010	GARY MILLER	06/14/2010	13
	09/20/2011	GREG	10/15/2011	25
	04/18/2012	CARL	04/18/2012	0
	09/28/2012	SUSAN	10/29/2012	31

## Preprint File Labels

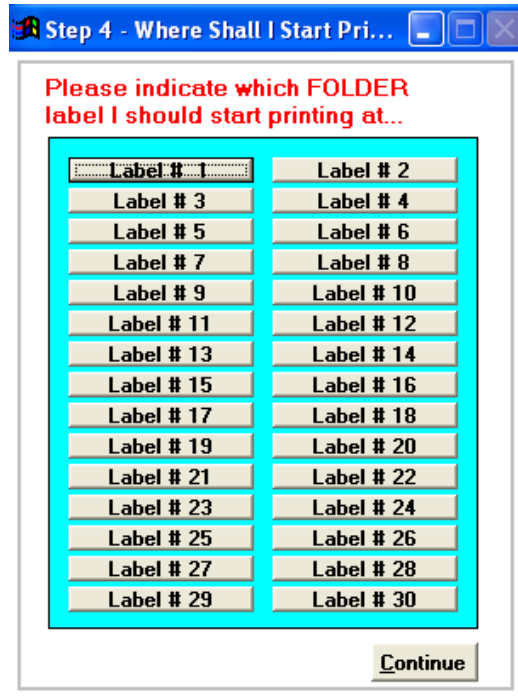
This feature provides for preprinting file labels for use by your departments. Instruct them to place a bar-coded label onto each file as it is created. When the files come into the records center they are ready for processing with our Portable Bar Code Reader – Add-On Module.

Indicate if you want the company and department to appear on the label, how many labels you want, and whether you want the file automatically put into the database.

To order labels call RMS at 914.725.5900 or email us.

## Where Shall I Start Printing?

This enhancement provides for better label usage by letting you use a sheet of labels that still has one or more blank labels. Traditionally, when you print file labels that end in the middle of a page of labels, perfectly good blank labels remain. Now you can use the partial page of labels as the first sheet and tell the system where on the sheet you want to start. Even though Label # 1 is highlighted you must still click on one of the selections.




Click **Continue** from the Preprint File Labels screen to see this screen.

## F2/F3 Remembering Key Fields

When entering a large number of files that have a lot of repeated information within them, this feature allows you to tell the system to remember key fields.

1. Enter the data: Company, Department, File Date, Major Description, Box Number, and Box Location.
2. Click the **F2** key from File Information Screen.
3. To insert this information into a new file, make sure that you are in the Add mode (in other words after clicking **Add**). Click the **F3** key and the saved information is inserted into the new file.

## Field Explanations

	<p><b>Note:</b> The following information refers to original field names that the software provides. If you have changed any of the field names they may no longer correspond to the information that follows.</p>
---	--

**File Number:** A 15 character field. It is recommended that you assign each file a unique file

number. When using a numerical file number the system can automatically assign the file number. For more information on automatically suggesting file number, please see File Screen Setup. However, you can enter anything which makes sense to you.

Example: FILE-001  
ABC-100-90

**Company:** A 10 character field. This is the higher of the two levels provided (Company and Department). It is recommended to pull down the handle to select a company.

Example: ROYAL  
0101000

**Department:** A 10 character field. This is the lower of the two levels provided (Company and Department). It is recommended to pull down the handle to select a department.

Example: FINANCE  
0102000

**File Is:** A 10 character field used to indicate the IN/OUT status of the file.

Example: IN indicates File is IN  
OUT indicates File is OUT

**On:** When the file is checked out this field displays the date the file is checked out.

Example: 07/20/2020

**To Whom:** When the file is checked out, this 20 character field displays to whom the file is checked out.

Example: MARY SMITH  
WILLIAM JOHNSON

**File Date:** A standard date field used to record the date the file was created or the date the file was transferred to the central filing room or the records center.

Example: 08/11/2020

**Destroy Date:** A standard date field used to indicate when this file can be destroyed.

Example: 12/31/2027

**From Date:** A standard date field used to record the earliest date of the material within



this file. If this file contains information starting in January 04, 2020 and continues to March 20, 2021 you enter:

Example: 01/04/2020

**To Date:** A standard date field used to record the last date of the material within this file.

Example: 03/20/2021

**Major:** A 30 character field used to record the “more important” topic of the file. For a law firm, this could be their client’s name. For a medical facility it could be the patient’s name. Information entered into this field prints on your reports and can be key word searched.

Example: SMITH, MARY  
WILSON & CAMPBELL

**Minor:** A 30 character field used to record additional descriptive information for this file. For a law firm, this could be a brief description of the case. For a medical facility it could be the procedure performed. Information entered into this field prints on your reports and can be key word searched.

Example: LEASE CONTRACTS  
EKG & EEG PROCEDURES

**Matter:** A 13 character field used to record any internal referencing for this file. For a law firm, this could be the firms’ case number. For a medical facility it could be the patient’s identification number.

Example: ABC-9031  
328-58-2225

**ID No:** A 5 character field optional field for further identification. In a law firm, it could be used for the attorney handling the matter initials. In a medical group, they might enter the initials of the primary physician. Or you might want to use this field for the initials of the person entering the data.

**File Location:** A 15 character field to describe the location of the file, whether it be on a shelf or in a file cabinet.

**Box Number:** A 15 character field used to record the box number when the file is being stored in a box. If the file is not being stored in a box, leave this field empty.

Example: 32801  
*leave empty (no box)*

**Box Location:** A 15 character field used to record where the box is located if being stored in

a box. If the file is not being stored in a box, leave this field empty. If you enter valid box number, the box location will automatically populate.

Example:       A-01-01-21  
                  10-B -05  
                  *leave blank*

**Memo Field:**   Enter additional file information of unlimited characters. Information entered into this field prints on your reports and can be key word searched.

Example:        THIS FILE REPRESENTS THE FINAL DRAFT OF THE  
                  PURCHASE AGREEMENT BETWEEN THE FOLLOWING  
                  PARTIES:  
                  UNION BANK S.A.

## Definitions


**Active File/Open File:**   This is a file that is being stored on open shelving or in a file cabinet. It has not been sent to long term storage.

**Inactive/Closed File:**    This is a file that has been removed from the shelf and placed into a box for long term storage. Thus, any file that has a box number is considered as being inactive and/or closed.

## Chapter 4 Box Information

### Box Information Screen

The Box Information Screens focuses on collecting information about each box. This includes key fields used for instant access to information and a memo field used to enter an unlimited amount of information pertaining to the individual box.

 **Note:** The system allows you to change the names of the fields on the Box Information Screen. As such, this manual refers to each field by its original field name. Please take this into consideration in referencing information in this manual.

### Locate a Box

This screen allows you to select the order in which you will see the information on the Box Information Screen.

1. Select the display order by clicking the radio buttons on the left. Enter key information to start.

**For example:** If you want to see the information by box number, starting with box number 2701, you would select box number using the radio buttons, and enter “2701” into the field.

2. After making your selections click **Continue**.

BOX NUMBER	BOX LOCATION	BOX CONTENTS	EXPANDED TEXT	DATE RECEIVED	TO WHOM
3009	10-B-006	GENERAL LEDGER	memo	01/30/2007	
3011	10-B-005	TRUST - JOHN MADISON	memo	01/23/2007	
4001	10-B-004	GENERAL LEDGER	memo	09/27/2006	
4011	10-B-007	EXPENSE REPORTS	memo	04/25/2006	NANCY SMITH
4012		GENERAL LEDGER	memo	08/05/2002	
4013	10-B-005	EXPENSE REPORTS	memo	08/11/2008	
4014	10-B-004	EXPENSE REPORTS	memo	08/11/2008	
4015	10-B-009	EXPENSE REPORTS	memo	08/11/2008	
4016		GENERAL LEDEGER	memo	08/18/2008	
4218	12-A-001	ACCOUNTS PAYABLE	memo	02/23/2003	JOHN HARRIS
5101	10-B-007	TRADE INVOICES	memo	03/18/2003	
5437	10-B-005	GENERAL LEDGER	memo	07/11/2008	
5869	878.98		memo	06/21/2005	
5899	5-D-003	QUARTERLY SALES REPORTS	Memo	06/21/2005	

A browse window appears. This gives a list of boxes to choose from.

- Using your mouse button, click on the box you want to view, and close the browse window. After the browse window closes that record appears on the screen for you to view, edit or delete.
- Use the mouse to move up and down in the browse window and then click on the box you want to view.
- To close the browse window click on any part of the Box Information Screen outside the browse window or click **Esc**. You will return to the normal screen with all of that box's information presented.
- Using the **Top**, **Prev**, **Next**, and **End** buttons you can navigate forward and backward through the boxes.

### Add a Box

- Click **Add** from the Box Information Screen. The cursor appears in the Box Number field.
- Type the information you want to add and click **Save** when you are finished.
- If you want to cancel your add click **Cancel**.

### Edit a Box

- Click **Edit** from the Box Information Screen.
- Use the mouse and/or **Tab** key to move between the fields you want to change.
- To save your changes, click **Save**.
- To cancel your changes, click **Cancel**.

### Delete a Box

- Click **Delete** from the Box Information Screen. This deletes the box you are viewing on the screen. Please also see: Destroy Boxes below.

## Check Box Out



1. You must first click **Edit** to perform this function.

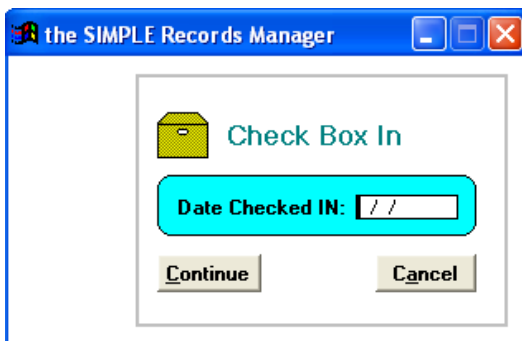
The prompt on the face of this button changes based upon the status of the box.

If the box is checked out the button displays "Check Box In". Likewise, if the box is available the button will be display "Check Box Out".

2. Find the Box that you want to check out and click **Edit**.

3. Then click Check Box Out.
4. Enter the name of the individual to whom the box is being sent and the date the box is being checked out.
5. You can also instruct the software to check out all of the files that are contained within this box. To do so, select the **Yes** radio button that goes with the questions "Shall I also flag all files that belong to this box as checked out?"

## Check Box In

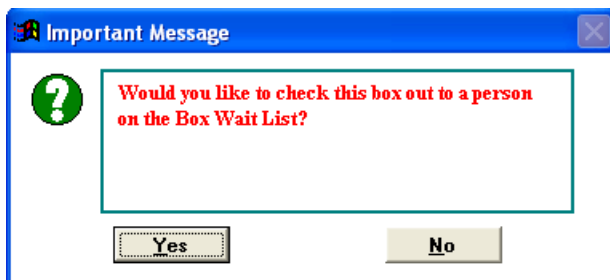


1. You must first click **Edit** to perform this function.

The prompt on the face of this button changes based upon the status of the box. If the box is checked out the button displays "Check Box In". Likewise, if the box is available the button displays "Check Box Out".

2. Locate the Box that you want to check in and click **Edit** from the Box Information Screen.

3. Click **Check Box In**.
4. You can enter the date that this box was returned and click **Continue** to check the box in.
5. If there are individuals that are waiting for this box you can recheck the box out to an individual on the wait list.



6. If you answer **Yes** to this question the following screen appears.



7. After clicking **OK** a browse window appears allowing you to select which individual you want to recheck this box out to.

	Person Requesting Box	Company	Department	Date Requested	Notes	Phone
▶	john garrison	RMS	ACCT	02/15/2013	memo	(617)678-0987
	susan fisher	RMS	LEGAL	02/20/2013	memo	(617)654-3298

8. To see the any notes regarding this request, double-click the mouse on the word '**Memo**' located the Notes column. The capital M in the word memo indicates that there is an entry in the memo field.
9. When you are finished reading the notes click the **Escape** Key.
10. After selecting the individual that you want to recheck this Box out to, close the Browse Window by clicking the **Escape Key**. The Check Box Out Screen appears again with the information for that individual. From there you can recheck the box out.

## Box Wait List

Box Wait List  
Box Number: 897

Name:  Date Requested:

Company:  ▲

Department:  ▲

Phone:

Top Prev Next End Locate Add Edit Delete Print Close

1. Use the Box Information Screen to select the box that you want to see the wait list for and click **Wait List**.
2. Use this screen to enter the individual's name that is requesting this box. From here you can add individuals to the wait list, or view requests that are already on the wait list.

## Destroy Boxes

1. After finding the box you want to destroy, click **Edit** button, then **Destroy Box** from the Box Information Screen.
2. Use this screen to enter the date the box will be or has been destroyed, the individual that authorized this destruction, and the method of destruction.
3. You can also tell SIMPLE to delete the files that were contained in this box from the database. Click **Continue** button to destroy the box, or click **Cancel** button to return to the Box Information Screen.
4. When the box is destroyed, the box information is saved into a separate database along with other boxes that have been destroyed. Also review Box Reports and the Mass Destroy Box Utility. The Mass Destroy Boxes Utility is a much better way to destroy groups of boxes.

## See Box History

From the Box Information Screen, click **See Box History**. A browse window shows the box's entire history of being checked out, to whom the box was checked out to, how long it was gone, and when it was returned. If a box is currently checked out, this information does not appear on this list until it is checked back in.

Date OUT	Check Out To	Date IN	Days
09/08/2012	SUSAN FIELD	09/22/2012	14
12/21/2012	MIKE HARRIS	01/08/2013	18

## See Files

Click **See Files** to display the files that are contained within this box. When you click this button the File Information Screen appears allowing you to view, change, and delete files that are contained within this box.


## F2/F3 Remembering Key Fields

This feature allows you to tell the software to remember key fields. This is handy when you are entering a large number of boxes that have a lot of repeated information within them.

By clicking **F2** from the Box Information Screen after having entered the data, the system remembers the Company, Department, Box Description, Date Received, and the Record Title Code.

When you are ready to insert this information into a new box, make sure that you are in the Add mode (in other words after clicking **Add**). Click **F3** and the information that you saved is inserted into your new box.

## Field Explanations

	<b>Note:</b> The following information refers to original field names that the software provides. If you have changed any of the field names, they may no longer correspond to the information that follows.
---	--

**Box Number:** A 15 character field. It is recommended that you assign each box a unique box number. When using a numerical box number the system can automatically assign the box number. For more information on automatically suggesting box number, please see Box Screen Setup. However, you can enter anything which makes sense to you

Example:       1500001  
                  ABC-100-90

**Company:** A 10 character field. This is the higher of the two levels provided (Company and Department). It is recommended to pull down the handle to select a company.

Example:       ROYAL  
                  0101000

**Department:** A 10 character field. This is the lower of the two levels provided (Company and Department). It is recommended to pull down the handle to select a department.

Example:       FINANCE  
                  0102000

**Box Is:** A 10 character field that displays the status of the box.

Example:       IN indicates Box is IN  
                  OUT indicates Box is OUT

**On:** A standard date field that displays the date the box was checked out.

Example:       08/20/2020

**Date Received:** A standard date field used to record the date the box was transferred to the central filing room or records center.

Example:       09/01/2020

**To Whom:** A 20 character field that displays to whom the box is checked out to.

Example:       SMITH, MARY  
                  JOHNSON, WILLIAM



**From Date:** A standard date field used to record the earliest date of the material within this box.

Example: 06/04/2020

**To Date:** This is a standard date field used to record the latest date of the material within this box.

Example: 08/20/2020

**Destroy Date:** A standard date field used to indicate when this box can be destroyed. If you have setup your retention schedule you can leave this field blank to automatically **calculate** the destroy date for you. The software looks into the retention schedule that you have created and if it finds a record where the company, department and record title code match, it then adds the total years and months to the to date for the box.

Example: 12/30/2027

**Box Contents:** A 30 character field used to record a brief description of what is being stored within the box.

Example: Paid Invoices 1000-1999

**Record Title Code:** A 50 character field used to enter the record title code as used the by the retention schedule. This field should not be confused with the records series.

Example: Accounts Payable  
Payroll Records

**Box Location:** A 15 character field used to record where the box is located.

Example: A-01-01  
B-01-21 -01  
*leave blank*

**Box Size:** A 4 character field used to identify the size of the box.

Example: STD  
TRAN

**Memo Field:** This is where you can enter additional box information of unlimited characters. Information entered into this field will print on your reports and can be key word searched.

Example: THIS BOX REPRESENTS THE FINAL DRAFT OF THE  
PURCHASE AGREEMENT BETWEEN THE FOLLOWING  
PARTIES:

UNION BANK S.A.  
FRED WILSON LTD.  
SUNSHINE PROPERTIES

## Chapter 5 Retention Information

### Building Your Retention Schedule

#### **Building a Retention Schedule is optional.**

You can enter the destroy date for each box or, you can leave the Destroy Date Field blank and SIMPLE will enter 12/31/9999 into the destroy date.

The SIMPLE Records Manager automatically calculates when a box is eligible for destruction using the information as established in the retention schedule. The calculation relates to boxes (not files) and uses the information entered when adding or editing a box.

For this calculation to occur you must first establish (build) a retention schedule for each item to be calculated — within each department, within each company.

Typically, you build your retention schedule based upon information gathered from your administration and legal departments wherein they instruct you as to how long each type of record is to be retained, as well as how each item is to be destroyed (i.e., recycle, shred, etc.).

You may also have certain types of records that are common to all departments that are configured without regard to each department. In any case, you must complete the process of entering your retention schedule before SIMPLE can assist you in this calculation.

#### **What is the basis of the Retention calculation?**

As each box is added, SIMPLE looks to see if you have filled in the following fields:

- Company Number (or whatever you may have renamed this field)
- Department Number (or whatever you may have renamed this field)
- To Date
- Record Title Code

Three of the above fields can be selected by clicking the Up Arrow button located to the right of each of the above mentioned fields.

Having entered the above four pieces of box information, SIMPLE checks to see if a retention schedule exists for that company, department and record title code. If so, and if you have entered a To Date, SIMPLE then uses the total number of years and months as indicated for the matching records title code and adds it to the To Date. It does not look at the number of months and years in the Office of Records Center fields, only the Total Retention Field.

**Example:** If you had a record title code established as follows:

Company	=	WIDGET
Department	=	ACCTG
Record Title Code	=	101.10 PAID INVOICE
Total Retention	=	6 (Years)

And you are adding a box, you are entering the following:

the SIMPLE Records Manager

Company = WIDGET  
Department = ACCTG  
To Date = 06/30/2020  
Record Title Code = 101.10 PAID INVOICES

**Tab** through the destroy date field (leaving it empty). SIMPLE calculates the destroy date as being 06/01/2021.

06/30/2020 + 6 years = 06/30/2026

### Other Considerations

SIMPLE realizes there might be times when you want to over ride the automatic process of the system calculating the destroy date. This is especially be true if a particular box of records is part of some pending litigation or audit. In this case, you might want to enter a date of your choosing without regard to what would normally be calculated by the software.

You can enter the desired date into the destroy date field. Having done so, SIMPLE will NOT perform the calculation — it accepts the date you entered.

If you leave the destroy date field empty and there is NO MATCHING item in your retention schedule, SIMPLE automatically enters the date 12/31/9999 into the destroy date field.

### Retention Information Screen

the SIMPLE Records Manager

## RETENTION Information

	Years	Months	Other
Record Series	GL		
Record Title	GENERAL LEDGER		
Company	RMS		
Department			
Original/Copy			
Cycle Begins			
Definition			
Office	3	0	
Center	4	0	
Retention	7	0	
Vital Records			<input type="checkbox"/>
Vital Schedule			
Vital Program			
Media			
Regulation			

Top Prev Next End Locate Add Edit Delete Print Close

Recalculate Destruction Dates for Boxes

The Retention Information Screen focuses on collecting information about your retention schedule. Key fields are used for instant access to information and two text fields used to enter an unlimited amount of information pertaining to the individual retention.

Using the **Top**, **Prev**, **Next**, and **End** buttons you can navigate forward and backward through the retentions.

### Locate a Retention Record

1. From the Retention Information screen, click **Locate**.

This screen allows you to select the order in which you see the information on the Retention Information Screen.

2. Use the radio buttons to select which order you want.
3. Click **Continue**.



A browse window appears. This gives you a list of retentions to choose from.

4. Using your mouse, click on the retention you want to view and close the browse window by clicking on any part window outside of the browse window or by clicking **Esc**.
5. When the browse window is closed the record appears on the screen for you to view, edit or delete. You then return to the normal screen with all of that retention's information presented.

Locate Record				
	Record Series	Record Title Code	Company	Department
	AP	ACCOUNTS PAYABLE	LEVEN	A
	CASH RECEIPTS	CASH RECEIPTS JOURNALS	RMS	ACCT
	GL	GENERAL LEDGER	RMS	ACCT
	LEGAL	LEGAL RECORDS	RMS	LEGAL
	PMR	PATIENT MEDICAL RECORDS	RMS	LEGAL
	WILLS	WILLS	LEVEN	TEST1

### Add a Retention Record

1. Click **Add** from the Retention Information Screen. The cursor appears in the Record Series field.
2. Type the information you want to add.
3. Click **Save** when you are finished.
4. If you want to cancel your add click **Cancel**.

### Edit a Retention Record

1. Click **Edit** from the Retention Information Screen. The cursor appears in the Record Series field.
2. Use the mouse and/or **Tab** key to move between the fields you want to change.
3. To save your changes, click **Save**.
4. To cancel your changes, click **Cancel**.

## Delete a Retention Record

Click **Delete** from the Retention Information Screen. This deletes the retention record you are viewing on the screen.

## Recalculate Destruction Date for Boxes

**Recalculate New Destroy Dates.**

This process provides for recalculating the Box Destroy Dates.

Recalculate just this one Title Code:

Recalculate All Record Title Codes

First select company

Recalculate just one Department

Recalculate all Department

Print just the items whose destroy date has changed

1. From the Main Menu click **Retention Schedule**.

Having had reason to change your retentions via the Retention Information Screen, you can then recalculate the destruction dates as then being carried in you box inventory database. This allows you to choose the Record Title Code and Company or the Record Title Code, Company and Department.

2. Click **Continue** to have destruction date recalculated and a report printed.

## Field Explanations

**Record Series:** A 50 character field, used to identify the record series to which this record title belongs. You can have more than one record title associated with each record series.

Example: FINANCIAL RECORDS  
PERSONNEL RECORDS  
LITIGATION RECORDS

**Record Title:** A 50 character field used to identify the record title being established.

Example: PAID INVOICES  
EMPLOYMENT APPLICATION  
ORDER TO SHOW CAUSE

**Company:** A 10 character field. This allows you to be specific in establishing retentions as they relate to each company. It is recommended to pull down the handle to select a company.

Example: ROYAL  
0101000

**Department:** A 10 character field. This allows you to be specific in establishing retentions as they relate to each department. It is recommended to pull down the handle to select a department.

Example: FINANCE  
0102000

**Original/Copy:** A 15 character field used to indicate if an original of a copy of the record is to be retained. This could be different department by department.

Example: ORIGINAL COPY

**Vital Records:** A check box used to indicate if these records are considered as being "Vital". If these are vital records click on this field, if not, leave blank.

Example: X (These are Vital Records)  
Blank (Not Vital Records)

**Vital Schedule:** A 30 character field used to enter the "name" of the vital schedule to which these records are associated.

Example: CUSTOMER RECORDS

**Vital Program:** A 30 character field used to specify the vital records program to which these records are associated.

Example: CUSTOMER OUTSTANDING INVOICES

**Cycle Begins:** A 30 character field used to describe when the retention actually begins for this record title.

Example: AFTER MONTH END  
AFTER AUDIT  
WHEN CONTRACT IS COMPLETED  
WHEN PROJECT IS FINISHED

**Media:** A 30 character field used to indicate the type material to be retained.

Example: MAGNETIC TAPES  
HARD COPY RECORDS  
MICROFICHE

**Office – Years:** A 2 character field used to indicate (in years) how long the records for this record title is to be held in the office before sending for long term storage.

Example: 2 (Years)  
1 (Year)

**Office – Months:** A 2 character field used to indicate (in months) how long the records for this record title is to be held in the office before sending for long term storage.

**Office – Years** and **Office – Months** fields work together to describe (in years and months) how long the records are to be held in the central filing area, records center or to be held by your offsite storage company.

Example: 6 (Months)  
1(Month)

**Office – Other:** A 10 character field use to describe the retention in terms other than numeric. This takes precedence over years and months information.

Example: PERMANENT (meaning forever)

**Center – Years:** A 2 character used to indicate (in years) how long the records for this record title are to be held in the central filing area, records center or to be held by your offsite storage company.

Example: 2 (Years)  
1 (Year)

**Center – Months:** A 2 character field used to indicate (in months) how long the records for this record title are to be held in the central filing area, records center or to be held by your offsite storage company.

**Center – Years** and **Center – Months** fields work together to describe (in years and months) how long the records are to be held in the central filing area, records center or to be held by your offsite storage company.

Example: 6 (Months)  
1 (Month)

**Center – Other:** A 10 character field use to describe the retention in terms other than numeric. This takes precedence over years and months information.

Example: PERMANENT (meaning forever)

**Retention – Years:** A 2 character field used to indicate (in years) how long (in total) the records for this record title is to be held.

Example: 2 (Years)  
1 (Year)

**Retention – Months:** A 2 character field used to indicate (in months) how long the records for this



record title is to be held (in total).

**Retention – Years** and **Retention – Months** fields work together to describe (in years and months) how long the records are to be held in the central filing area, records center or to be held by your offsite storage company.

Example:       6 (Months)  
                  1 (Month)

**Retention – Other:** A 10 character field use to describe the retention in terms other than numeric. This takes precedence over years and months information.

Example:       PERMANENT (meaning forever)

**Definition:** This field of unlimited characters is used to enter the definition as it pertains to this record title.

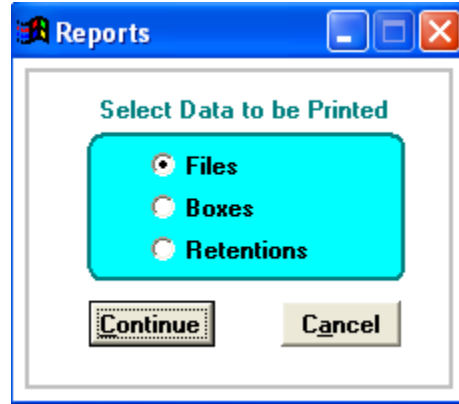
Example:       ALL ORIGINAL TIME CARDS MUST BE SIGNED BY BOTH  
                  THE EMPLOYEE AND SUPERVISOR AND SUBMITTED  
                  TO THE PAYROLL DEPARTMENT AT THE END OF EACH  
                  PAY PERIOD.

**Regulation:** This field i of unlimited characters s used to enter the regulation or company policy as it pertains to this record title.

Example:       COMPANY POLICY PER-103, FEDERAL REGULATION  
                  132.44 AND STATE REGULATION 236.89 REQUIRE ALL  
                  ORIGINAL TIME CARDS TO BE RETAINED FOR 7  
                  YEARS.

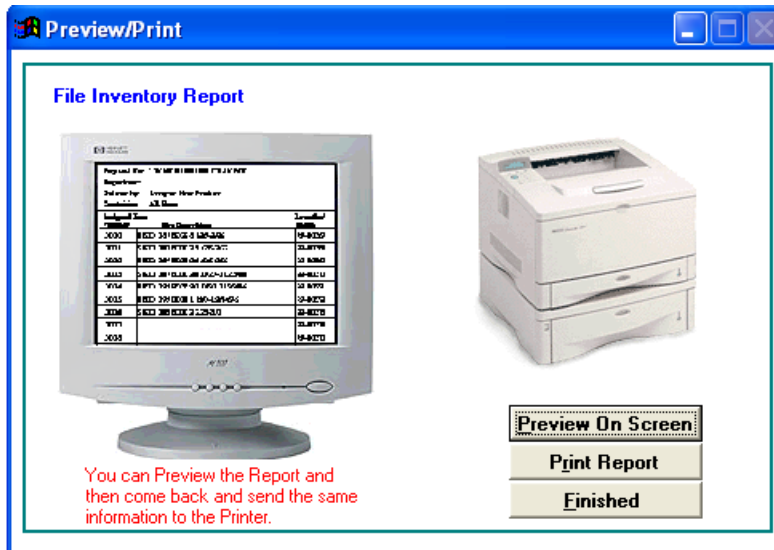
## Chapter 6 Reports/Labels

1. From the Main Menu click **Reports**.



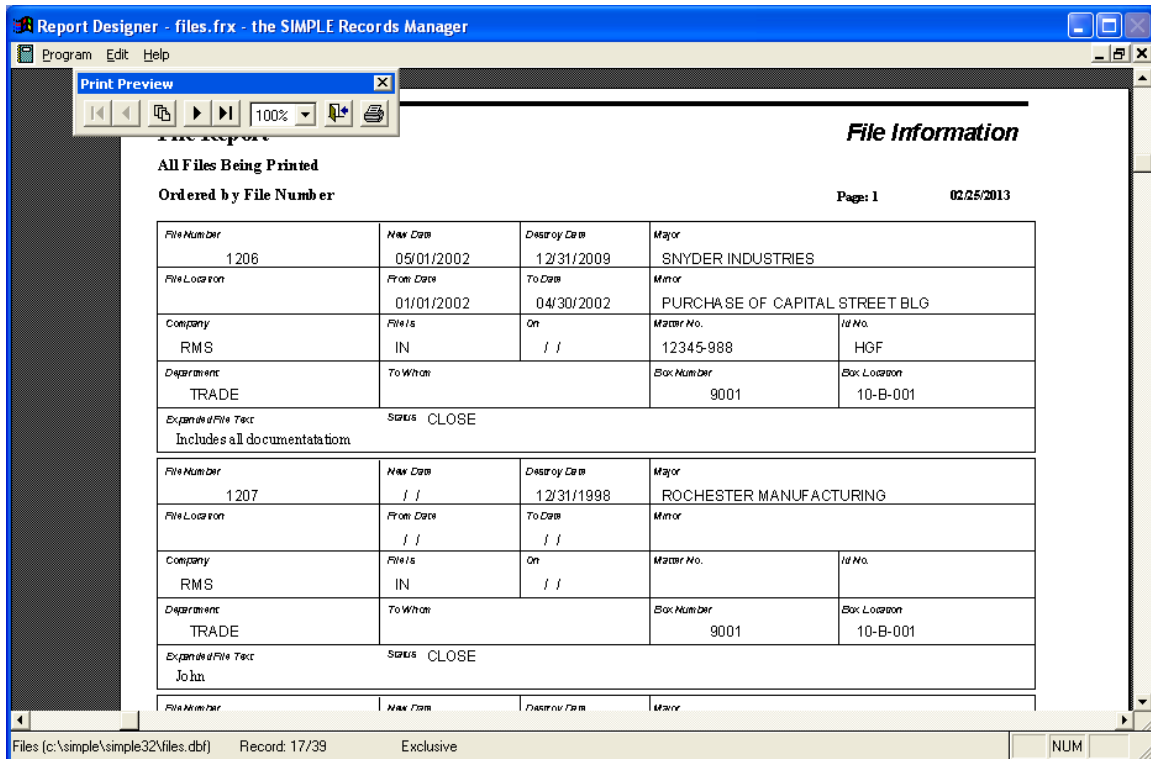
2. Choose which the type of report by clicking on the radio buttons.
3. Click **Continue**.

### Previewing Reports




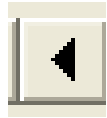


All reports can be viewed on screen (previewed) or directed to the printer.

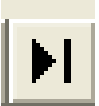

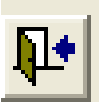

Following is an example of a file report directed to the screen.



## Understanding the Print Preview Buttons



	<b>Go To First Page</b> — move to the very first page of the report.
	<b>Go To Previous Page</b> — move to the previous page of the report. If this is the first page, this button is dimmed.
	<b>Go To Page</b> — select the page to go to.
	<b>Go To Next Page</b> — move to the next page of the report. If the report is only one page or if this is the last page, this button is dimmed.

	<b>Go To Last Page</b> — move to the very last page of the report.
	<b>Zoom in or out the preview window.</b>
	<b>Close the preview window.</b>
	<b>Print</b> — send the report to the printer.

### Selecting Information to be Included on Reports

When offered a choice as to what information is to be included in the report, i.e., a range of files, a range of departments, etc., there are four combinations of choices:

- Something entered into the first field tells the system with which record to begin. Leaving the second field empty tells the system to include all records thereafter.
- An empty first field and something in the second field tells the system to begin with the first record and continue up to including the record indicated in the second field.
- With something in both fields, SIMPLE limits the report to just those records falling between (and including) those two entered.
- With both fields empty, all records are printed.

### Report Formats

Most reports can be printed in a Fancy Format or List Format. The Fancy Format is slower than the List Format and prints each report as though it was a preprinted form. The List Format is more like a traditional computer report.

### Fancy Format

For this format, the computer *draws* the form onto the paper, with all the lines and boxes, and then prints the information in each of the boxes provided. In this format the system can usually fit no more than three or four files (or boxes, etc.) per printed page. Although this takes longer to print it makes for the best presentation.

**File Report**

**File Information**

All Files Being Printed

Ordered by File Number

Page: 1

02/25/2013

File Number	New Date	Destroy Date	Major	
1206	05/01/2002	12/31/2009	SNYDER INDUSTRIES	
File Location	From Date	To Date	Minor	
	01/01/2002	04/30/2002	PURCHASE OF CAPITAL STREET BLDG	
Company	File/s	On	Master No.	Id No.
RMS	IN	//	12345-988	HGF
Department	To Whom		Box Number	Box Location
TRADE			9001	10-B-001
Expanded File Text		Status CLOSE		
Includes all documentation				
File Number	New Date	Destroy Date	Major	
1207	//	12/31/1998	ROCHESTER MANUFACTURING	
File Location	From Date	To Date	Minor	
	//	//		
Company	File/s	On	Master No.	Id No.
RMS	IN	//		
Department	To Whom		Box Number	Box Location
TRADE			9001	10-B-001
Expanded File Text		Status CLOSE		
John				
File Number	New Date	Destroy Date	Major	
1208	//	//	ROCHESTER MANUFACTURING	
File Location	From Date	To Date	Minor	
	//	//		
Company	File/s	On	Master No.	Id No.
RMS	IN	//		
Department	To Whom		Box Number	Box Location

### List Format

This format is more like the traditional computer print outs, wherein the information is printed in columns. More information is displayed on each page and needs to be printed in the landscape mode to include all the columns on one page.

Box Report		Box Information			
All Boxes Being Printed		Page: 3 02/25/2013			
Ordered by Box Contents					
Box Number	Record Title Box Contents	Company Department	From Date To Date	Date Received Destroy Date	Box Location Box Id
4014	CASH RECEIPTS JOURNALS EXPENSE REPORTS	RM S SALES	// //	08/11/2008 //	10-B-004 IN
4016	CASH RECEIPTS JOURNALS EXPENSE REPORTS	RM S SALES	// //	08/11/2008 //	10-B-009 IN
1291	EXPENSE WORKSHEETS	RM S SALES	01/01/2005 12/31/2005	04/12/2005 12/31/2005	10-B-001 IN
4018	GENERAL LEDGER GENERAL LEDGER	RM S ACCT	01/01/1990 12/31/1990	08/18/2008 12/29/2008	IN IN
123	GENERAL LEDGER GENERAL LEDGER	RM S ACCT	01/01/2007 03/31/2007	02/01/2008 03/29/2014	5-B-003 IN
66678	GENERAL LEDGER GENERAL LEDGER	RM S ACCT	07/01/2003 12/31/2003	02/22/2004 12/29/2011	OUT OUT
704	GENERAL LEDGER GENERAL LEDGER	RM S ACCT	01/01/2001 12/31/2001	08/05/2002 12/29/2009	5-D-003 IN
654	CASH RECEIPTS JOURNALS GENERAL LEDGER	RM S ACCT	01/01/1999 12/31/2000	11/12/2002 12/30/2008	10-B-009 IN
9001	GENERAL LEDGER GENERAL LEDGER	RM S TRADE	01/01/2002 12/31/2002	01/17/2002 12/31/9999	10-B-001 IN
8001	GENERAL LEDGER GENERAL LEDGER	RM S ACCT	01/01/2000 12/31/2000	04/01/2003 12/29/2008	10-B-004 IN
8002	GENERAL LEDGER GENERAL LEDGER	RM S ACCT	01/01/2001 08/30/2001	04/01/2003 06/28/2009	10-B-004 IN
20012	GENERAL LEDGER GENERAL LEDGER	LEVEN ACCT	01/01/2001 12/31/2001	07/23/2003 12/29/2008	10-B-002 IN
20013	GENERAL LEDGER GENERAL LEDGER	RM S ACCT	01/01/2003 08/30/2003	07/23/2003 06/28/2011	10-B-005 OUT
705	GENERAL LEDGER GENERAL LEDGER	RM S ACCT	01/01/2001 12/31/2001	08/05/2002 12/29/2009	5-D-003 IN
706	GENERAL LEDGER	RM S	01/01/1990	08/05/2002	

## File Report Menu



1. Select the desired report.

**File Number**  
 **Company**  
 **Department**  
 **Date received**  
 **File Location**  
 **Major**  
 **Minor**  
 **Matter No.**  
 **Id No.**  
 **To Whom**  
 **Box Number**

**Preview on Screen**  
 **Send to Printer**

**Fancy (Box Drawing)**  
 **List Format**

**Do NOT Include CLOSED Files**

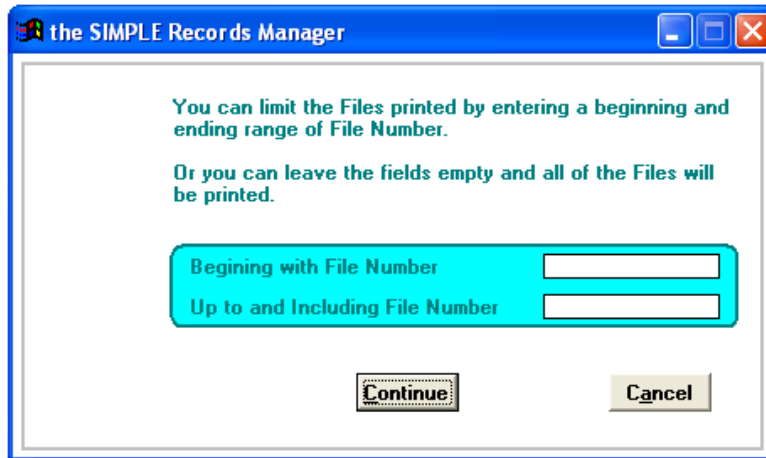
2. Select the order in which to print the report.
3. Select the report destination
4. Select the report format: Fancy or List.
5. *This option applies to only the File and Department Reports.* If chosen, the resulting report will NOT show any files that have a box number or files marked as closed.  
  
This option does NOT apply to the remaining reports and as such will be grayed out (turned off).
6. Click Continue.

Refer to Chapter 3 for Definition of Active/Open Files and/or Inactive/Closed Files.



## File Report

This is a formatted report of your file information in whatever order you



choose.

When selected, this screen allows you to specify which files are to be included.

## Company Report

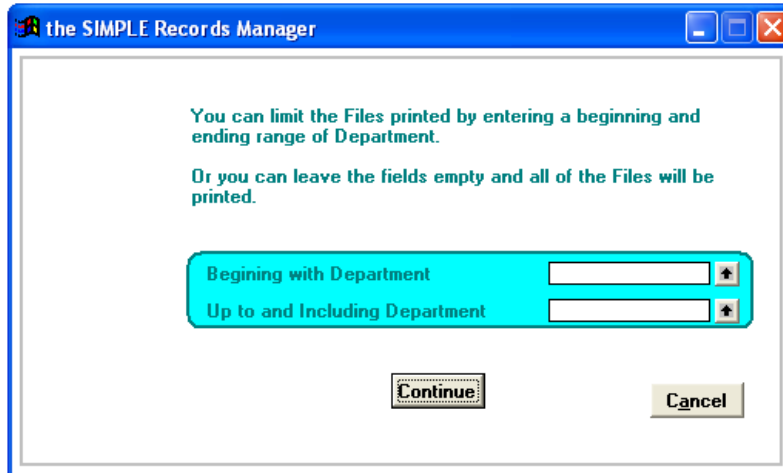
This is a formatted report of your file information.



When selected, this screen allows you to specify which companies are to be included.

## Department Report

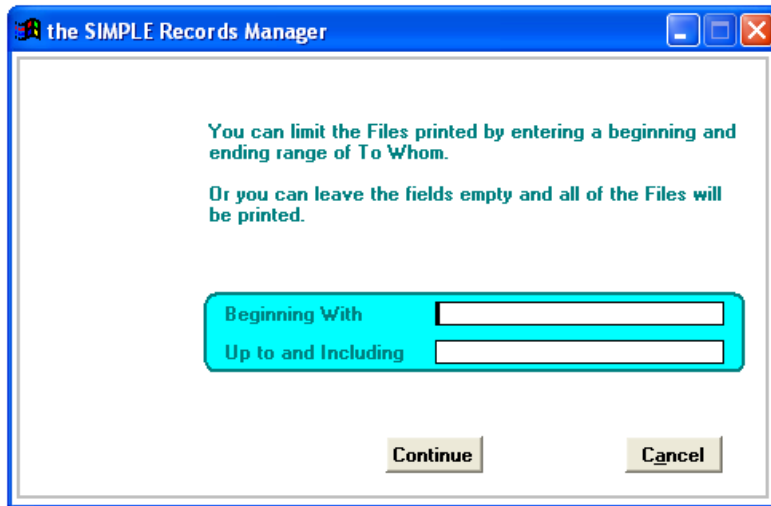
This is a formatted report of your file information.



When selected, this screen allows you to specify which departments are to be included.

### Files Checked Out Report

This is a formatted report of your file information.



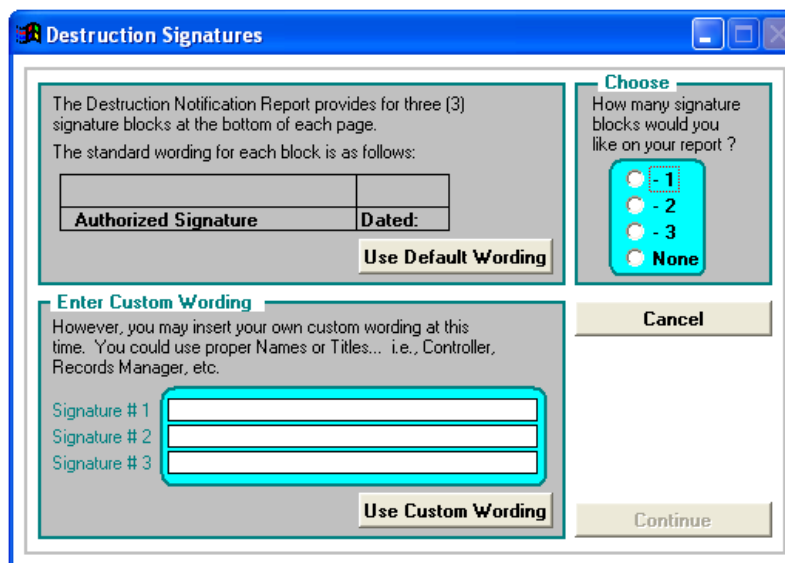
When selected this screen allows you to specify which individuals are to be included

### Files Eligible for Destruction Report

This is a formatted report of files that are eligible for destruction.



When selected, this screen allows you to specify which destruction dates are to be included.



This screen allows you to choose up to three signature blocks to be printed on each page of the report. You may also choose not to print any signature blocks.

1. Choose the number of desired signatures blocks by clicking on the radio button to the left of your preference.  
Having clicked on 1 – 3 signatures required, the buttons **Use Default Wording** and **Use Custom Wording** become active.
2. Click **Use Default Wording** for “Authorized Signature” to print for each of the signature blocks.
3. Or click **Use Custom Wording**. The cursor moves to the first field for you to enter the Title or Name and Title desired.

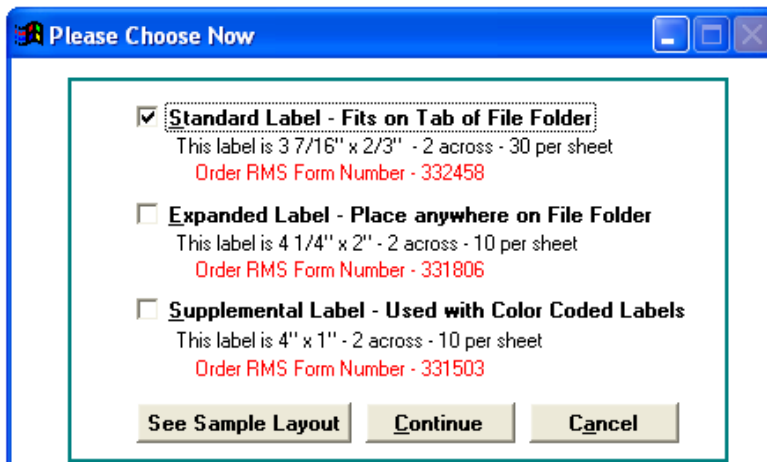
Example: Martha Hughes, Controller  
VP - Administration

When you have finished, click **Continue** and the Destruction Notification Report and the Destruction Notification Recap Report print.

## File Labels

### Step 1 — File Label Formats

These are formatted file labels using #5266, #5267 Avery Labels for the Standard and Expanded Labels.



From this screen you can view a sample of the choices available and select the style of label you wish.

## Sample Layouts

### Standard File Label



Fits on tab of file folder  
3 16/1 7"x 2/3" - 30 per sheet.

### Expanded File Label

File Number <b>5</b>			
WIGET INTERNATIONAL, INC. ADMINISTRATION/PLANNING DEPT.		WIGET 201	
COMMITTEE-PROJECT 1995 (1983-) FINANCE COMMITTEE DOCS			
JAC-88732		FLB	
File Date	File From Date	File To Date	File Destroy Date
01/15/1999	06/01/1997	12/31/1998	12/31/2004

This label contain more descriptive file information and can be placed anywhere on the file folder.  
4 1/4"x 2" - 10 per sheet.

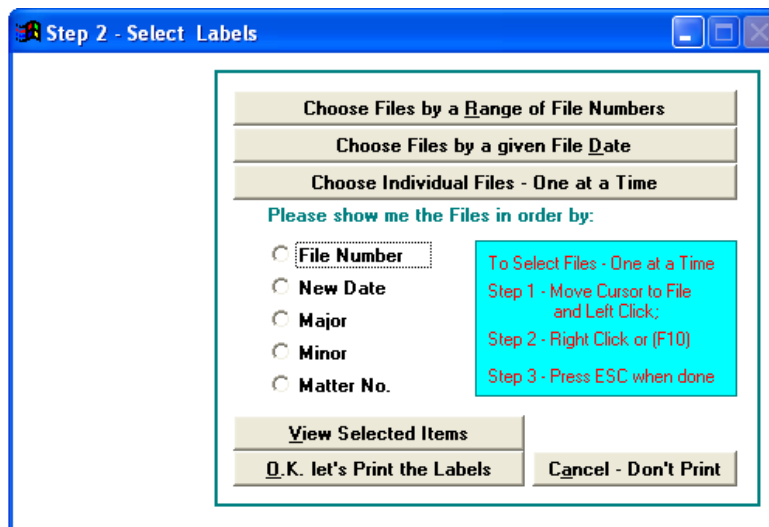
## Supplemental File Label

TEST DEPARTMENT # 710	710		
CALENDAR/ITINERARY			
TEST MINOR DESCRIPTION INFO.			
TEST MATTER #	CBNK		
01/10/99	06/30/98	12/31/98	12/31/89
Please Put this Label onto File Number: 1			

This label is commonly used with color coded file labels. 4" x 1" - 20 per sheet.

### Step 2 — Select Labels

This screen, and its various options, provides for selecting those specific files for which a new label is to be printed.

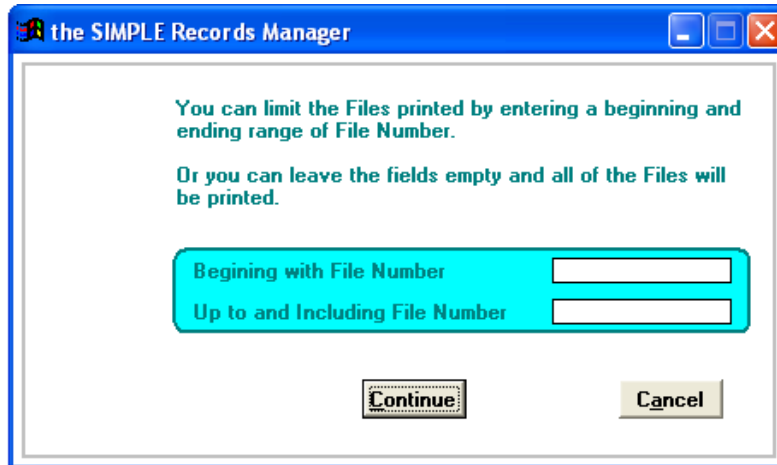


There are three methods which can be used individually or in combination with each other, to select those files for which a new label is to be printed. These methods accessed via the following screen.

#### Method 1 — Choose Files by a Range of File Numbers

This method provides for entering a range of file numbers.

Having clicked on the top button on the screen **Step 2 - Select Labels**, you are presented with the following screen.



Enter a beginning and ending file number to be included in this process. SIMPLE finds all the files within the range specified, and puts them into a temporary holding file.

Click **Continue** to return to the **Step 2 — Select Labels** menu.

### Method 2 — Choose Files by a Given File Date

This method provides for entering a range of file dates.



Enter a beginning and ending date to begin the process. SIMPLE finds all the files within the range specified, and puts them into a temporary holding file. After clicking **Continue**, you return to the **Step 2 — Select Labels** menu.

### Method 3 — Choose Individual Files — One at a Time

This method is the most versatile in that it presents your files in a browse window, allowing you to click on the individual files that you now want a label printed for.

Having clicked on the third button, the middle of the **Step 2 — Select Labels** becomes enabled.

Please show me the Files in order by:

- File Number
- File Date
- Major
- Minor
- Matter No.

To Select Files - One at a Time  
Step 1 - Move Cursor to File  
and Left Click;  
Step 2 - Right Click or (F10)  
Step 3 - Press ESC when done

The first part of this process requires you to indicate the order of the files. Select the sequence that best aids you in finding and selecting the individual files that need a label. After you finish selecting, you are presented with a browse window listing all files in the order requested.

To review briefly the usage of a browse window,

1. Move the cursor to each file to be included and **Left Click**.
2. Press either the **F10** key or **Right Click** to select the file and put into the temporary holding file. SIMPLE flashes a message box notifying you that the file has been selected.
3. If you already selected a file using another method, SIMPLE does not add it a second time.
4. When you complete the task press **ESC** to return to the **Step 2 — Select Labels menu**.

### View Selected Items

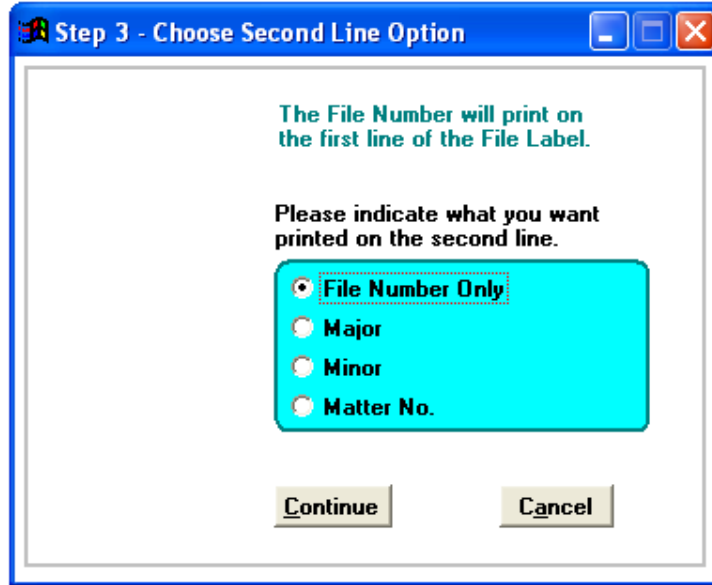
Click **View Selected Items** to preview the files you have selected and made omissions to in the browse window.

### OK Let's Print the Labels

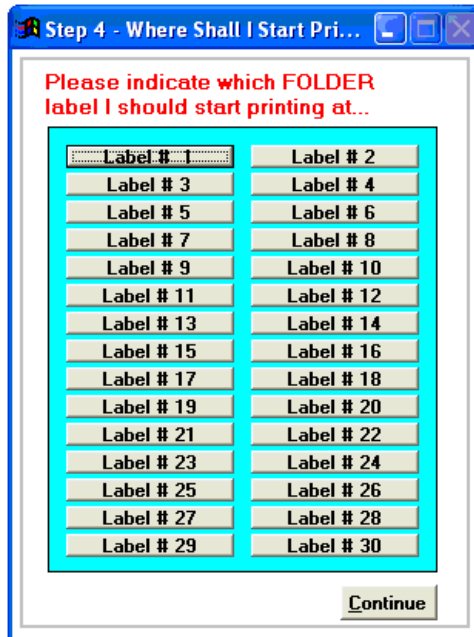
After gathering all the files for which labels need to be printed, click **OK Let's Print the Labels**. The screen presented depends on the select of the style label you choose (Standard, Expanded or Supplemental).

### Standard File Label

This label prints the File Number and a Bar Code on the first line of the label. You are given the option of having nothing on the second line, or Major Description, Minor Description, or Matter Number.

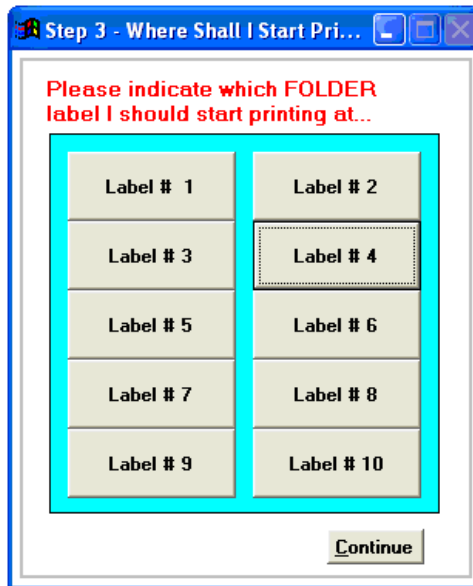


Make your choice and then click **Continue**, or **Cancel** to return to the Main Menu. **Continue** transitions you to the next screen wherein you can indicate what position on the page of labels you want the printer to start at.





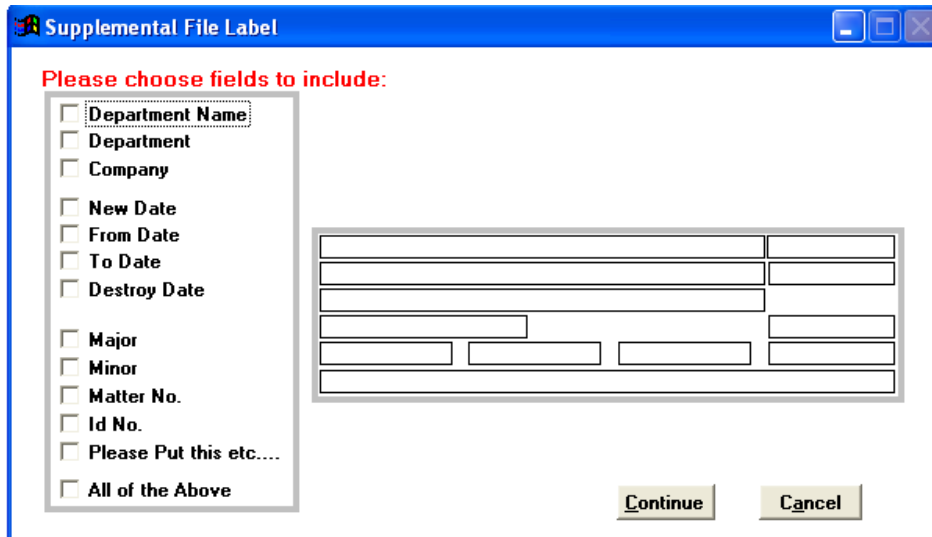
## Expanded File Label



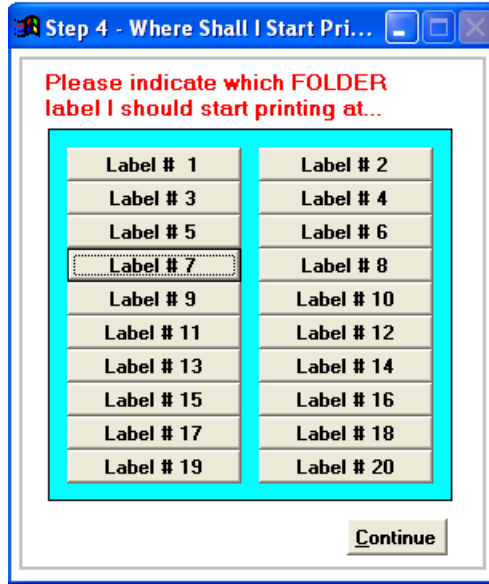
With this style label selected, you are presented with a screen to indicate at what position on the page of labels you want the computer to start. Thus, if you click on **Label # 4** the printer commences printing at the label in that location.

## Supplemental File Label

This option allows you to indicate, field by field, which pieces of information you want to include on the label. You choose the fields via the next screen.



As you click on the fields you see sample information fill in the corresponding field on the simulated label shown above. When you are finished, click **Continue**.



Now you can use the partial page of labels as the first sheet and tell the computer where on the sheet you want to start.

### Box and File Counts



This report counts the total number of boxes and files for each company and department.

## Box and File Pull List

Having selected the **Box and File Pull List** report, you may enter a range of dates of when the boxes and files were checked out. After you enter your dates, select whether you want boxes and/or files included in this report and click **Continue**.

## File History Report

The File History Report displays the following screen, which allows you to print file activity for all files or a specific file, or for all individuals or a specific individual. You can select between just files currently out or the entire history of check outs/check ins for a range of dates.

## Box Report Menu

From the Main Menu click **Reports**. From the Reports screen, click **Select Box Reports** and then click **Continue**.

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### BOX REPORT MENU

Please select report

- Box Report**
- Company Report
- Department Report
- Boxes Checked Ot Report
- Boxes Eligible for Destruction Report
- Box Labels
- Boxes Destroyed Report
- Box History Report
- Boxes without destruction dates

**Fancy (Box Drawing)**  
 List Format

Please indicate Order

- Box Number**
- Company
- Department
- Date Received
- Box Location
- Box Contents
- To Whom
- Record Title

Include File Information  
 List Format - Print Expanded Text  
 Do NOT Print Box Location

**Continue** **Cancel**

- Box Report**
- Company Report
- Department Report
- Boxes Checked Ot Report
- Boxes Eligible for Destruction Report
- Box Labels
- Boxes Destroyed Report
- Box History Report

1. Select which report you want.

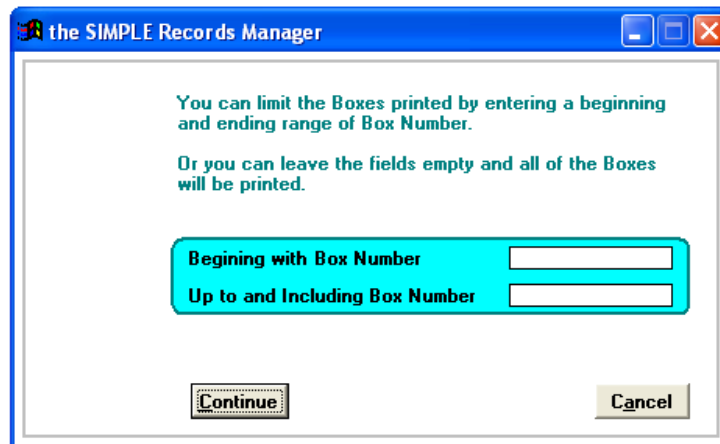
- Box Number**
- Company
- Department
- Date Received
- Box Location
- Box Contents
- To Whom

2. Select which order in which you want the report printed.

- |   |   |
|---|---|
| <input checked="" type="radio"/> <b>Preview to Screen</b><br><input type="radio"/> <b>Send to Printer</b> | 3. Select where the report will be sent.  |
| <input checked="" type="radio"/> <b>Fancy (Box Drawing)</b><br><input type="radio"/> <b>List Format</b>   | 4. Select whether the report is to be in the Fancy or List Format.                        |
| <input type="checkbox"/> <b>Include File Information</b>  | 5. Indicate if the Files for each Box are to be included.                                 |
| <input type="checkbox"/> <b>List Format - Print Expanded Text</b>   | 6. Indicate if you wish to print box expanded text on the <i>List Format</i> Box Reports. |
| <input type="checkbox"/> <b>Do NOT print Box Location</b>   | 7. Indicate if you wish to omit the box location information.                             |
|   | 8. Click <b>Continue</b> .  |

## Box Report

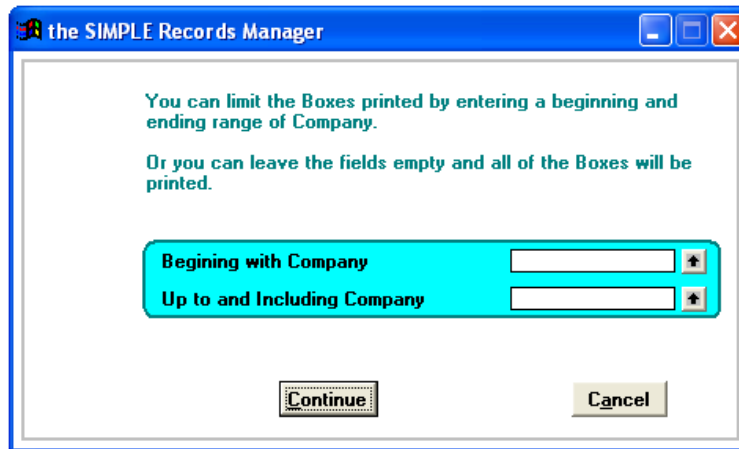
Create a box report based on specific box numbers.



1. Enter the box number of the first box to be included in the report.
2. Enter the last box number to be included in the report.
3. Click **Continue** to create the report or click **Cancel** to cancel the report.

## Company Report

Create a box report based on company names.



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You can limit the Boxes printed by entering a beginning and ending range of Company.

Or you can leave the fields empty and all of the Boxes will be printed.

Beginning with Company

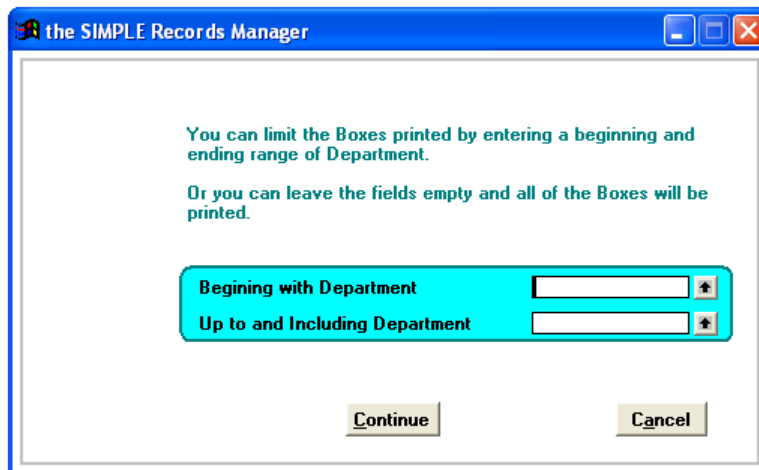
Up to and Including Company

Continue Cancel

1. Enter the company name of the first company to be included in the report.
2. Enter the last company name to be included in the report.
3. Click **Continue** to create the report or click **Cancel** to cancel the report.

## Department Report

Create a box report based on department names.



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You can limit the Boxes printed by entering a beginning and ending range of Department.

Or you can leave the fields empty and all of the Boxes will be printed.

Beginning with Department

Up to and Including Department

Continue Cancel

1. Enter the department name of the first department to be included in the report.
2. Enter the last department name to be included in the report.
3. Click **Continue** to create the report or click **Cancel** to cancel the report.

## Boxes Checked Out Report

Create a report for boxes check out based on to whom the box is checked out.

1. Enter the individual's name of the first individual to be included in the report.
2. Enter the last individual's name to be included in the report.
3. Click **Continue** to create the report or click **Cancel** to cancel the report.

A second screen appears where you can select a range of departments to include in the report. The screen is similar to the department report screen above.

## Boxes Eligible for Destruction

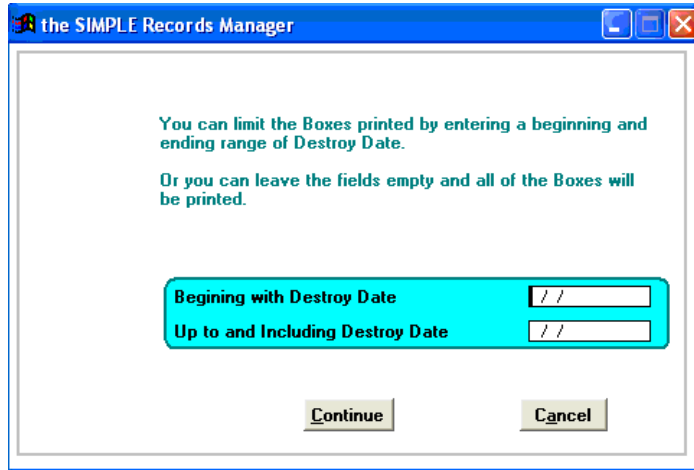
Create a report for boxes eligible for destruction based on the department name.

1. Enter the department name of the first department to be included in the report.

the SIMPLE Records Manager

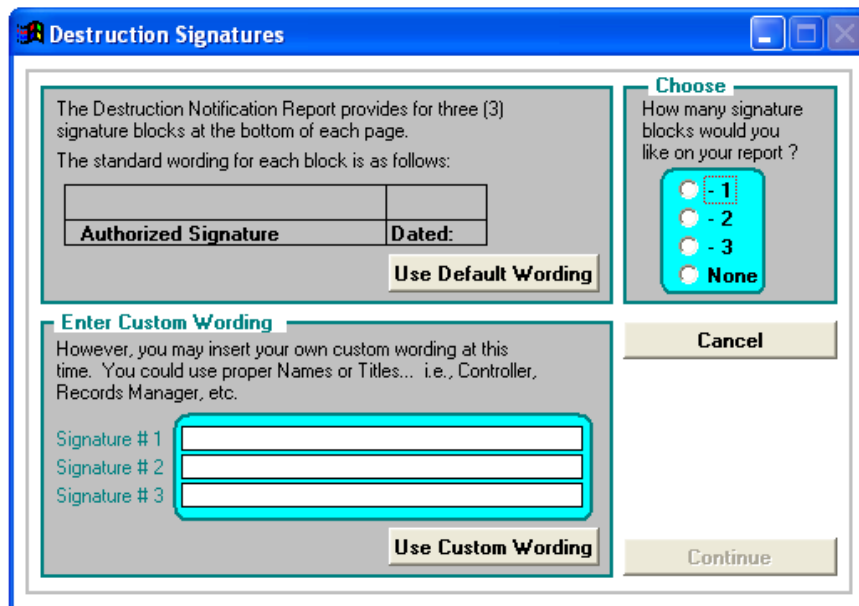
2. Enter the last department name to be included in the report.
3. Click **Continue** to create the report or click **Cancel** to cancel the report.

When selected, you are presented with this screen, allowing you to specify which destruction dates are to be included.



4. Enter the first date to be included in the report.
5. Enter the last date name to be included in the report.
6. Click **Continue** to create the report or click **Cancel** to cancel the report.

The Destruction Signatures screen displays.



This screen allows you to choose up to 3 signature blocks to be printed on each page of the report. You may also choose not to print any signature blocks.



- Choose the number of desired signature blocks by clicking on the radio button to the left of your preference.

**Choose**

How many signature blocks would you like on your report ?

- 1

- 2

- 3

**None**

Having clicked on 1 – 3 signatures required, the buttons **Use Default Wording** and **Use Custom Wording** become active.

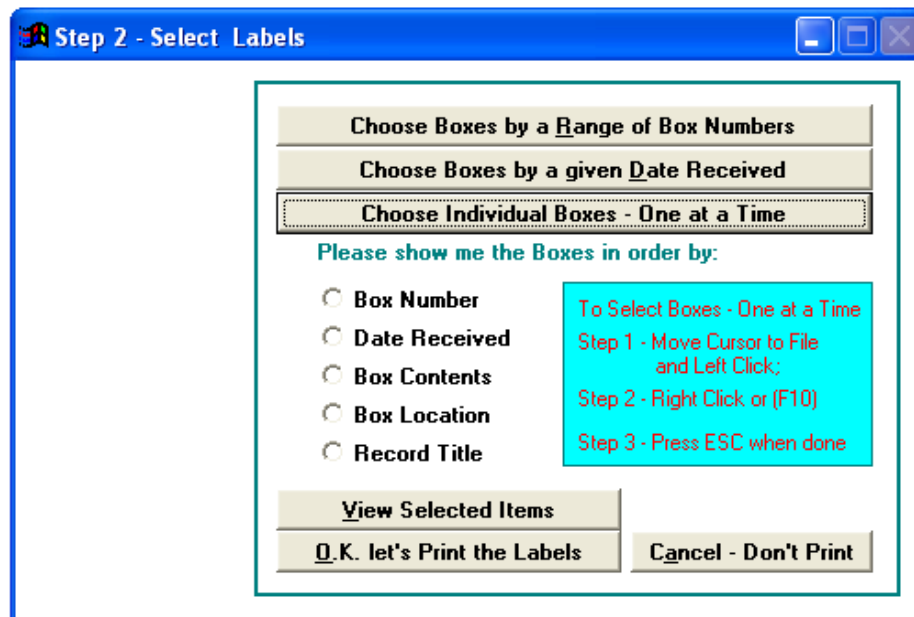
- Click **Use Default Wording** for “Authorized Signature” to print for each of the signature blocks. Or click **Use Custom Wording**, the cursor moves to the first field for you to enter the title or name and title desired.

Example:            Rochelle Wells,  
                                  Controller VP  
                                  Administration

- When you have finished, click **Continue** and the Destruction Notification Report and the Destruction Notification Recap Report print.

### Box Labels

This screen and its various options provide for selecting those specific boxes for which a new label is to be printed.

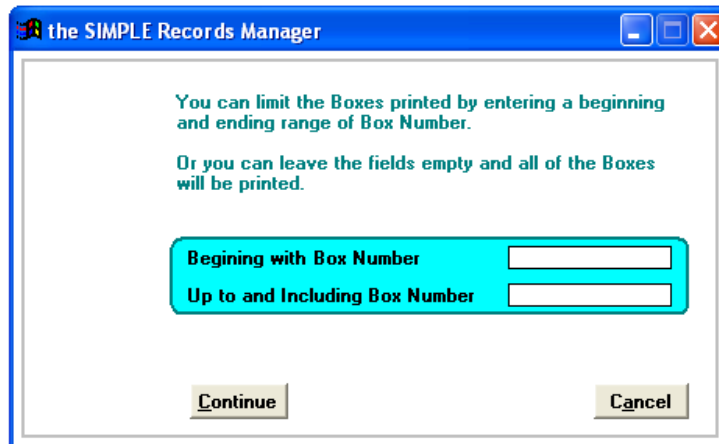


There are three methods which can be used individually OR in combination with each other, to select those files for which a new label is to be printed. These methods accessed via the following screen.

### Method 1 — Choose Boxes by a Range of Box Numbers

This method provides for entering a range of box numbers.

1. Click **Choose Boxes by a Range of Box Numbers**. The following screen appears.



the SIMPLE Records Manager

You can limit the Boxes printed by entering a beginning and ending range of Box Number.  
Or you can leave the fields empty and all of the Boxes will be printed.

Beginning with Box Number

Up to and Including Box Number

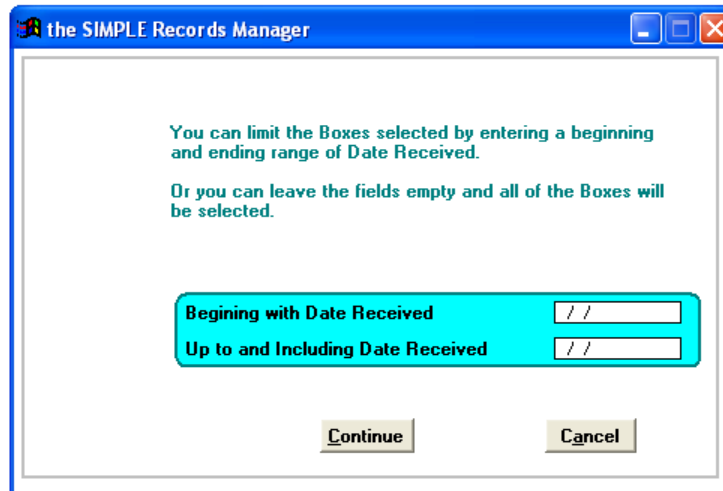
Continue Cancel

2. Enter a beginning and ending box number to be included in this process. The system finds all the boxes within the range specified, and puts them into a temporary holding file.
3. Click **Continue** to create the report or click **Cancel** to cancel the report. You return to the **Step 2 — Select Labels** menu.

### Method 2 — Choose Boxes by a Given Date Received

This method provides for entering a range of Dates Received.

1. Click **Choose Boxes by a Given Date Received**. The following screen appears.



the SIMPLE Records Manager

You can limit the Boxes selected by entering a beginning and ending range of Date Received.  
Or you can leave the fields empty and all of the Boxes will be selected.

Beginning with Date Received

Up to and Including Date Received

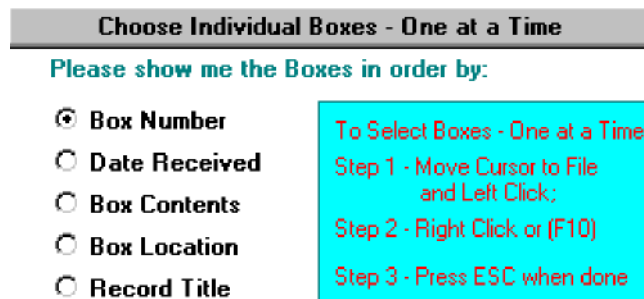
Continue Cancel

2. Enter a beginning and ending date to begin the process. SIMPLE finds all the boxes within the range specified, and puts them into a temporary holding file.
3. Click **Continue** to create the report or click **Cancel** to cancel the report. You return to the **Step 2 — Select Labels** menu.

### Method 3 — Choose Individual Boxes — One at a Time

This method is the most versatile in that it presents your files in a browse window allowing you to click on the individual boxes that you now want a label printed for.

1. Click **Choose Individual Boxes — One at a Time**. The following screen appears.



The first part of this process requires you to indicate the order of the boxes.

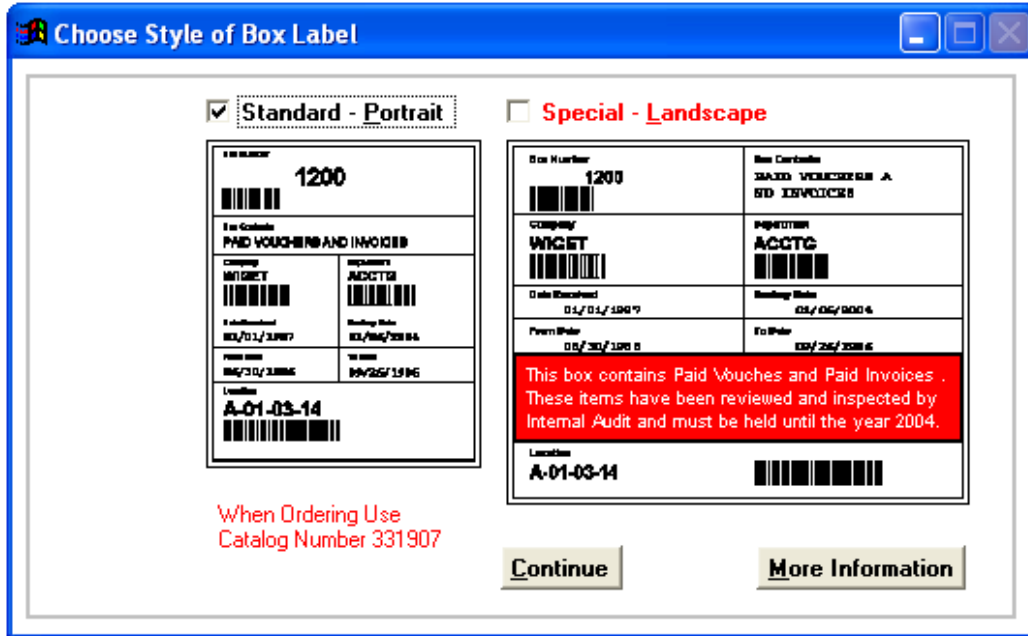
2. Select the sequence that best aids you in finding and selecting the individual boxes that need a label. After you have finished selecting, a browse window lists all of your boxes in the requested order.
3. To review briefly the use of a browse window, move the cursor to each file to be included and **Left Click**.
4. Press either the **F10** key or **Right Click** to select the file and put into the temporary holding file. SIMPLE flashes a message box notifying you the file has been selected. If you already selected a file using another method, SIMPLE does not add it a second time.
5. Press **ESC** when you have completed the task to return to the **Step 2 - Select Labels** menu.

### View Selected Items

Click **View Selected Items** to preview the files you have selected and made omissions to in the browse window.

### OK Let's Print the Labels

After gathering all the files for which labels need to be printed, click **OK Let's Print the Labels**. The screen presented depends on the select of the style label you choose (Standard, Expanded or Supplemental).

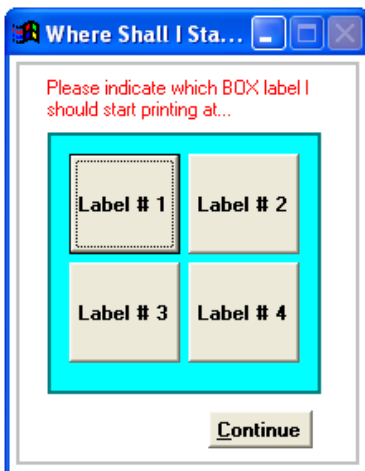


### Choose Style of Box Label

Both labels are printed on 331907 (4 1/4" x 5 1/2"), 4 labels per page. Order these from RMS 914.725.5900 or purchase this size label made by Avery.

The Standard Label is printed in the Portrait Mode. The Special Label is printed in the Landscape Mode and provides for printing of 200 characters of text from the Box Memo (Unlimited Text) Field.

### Where Shall I Start Printing?



This feature provides for better label usage, by letting you use a sheet of labels that still has one or more blank labels. Now you can use the partial page of labels as the first sheet and tell SIMPLE where on the sheet you want to start.

## Boxes Destroyed Report

Create a report for boxes that have been destroyed based on the department name.

the SIMPLE Records Manager

You can limit the Boxes printed by entering a beginning and ending range of Destroy Date.

Or you can leave the fields empty and all of the Boxes will be printed.

Beginning with Destroy Date

Up to and Including Destroy Date

Continue Cancel

1. Enter the first date to be included in the report.
2. Enter the last date name to be included in the report.
3. Click **Continue** to create the report or click **Cancel** to cancel the report.

## Box History Report

From the Main Menu select **Reports/Labels** then click **Boxes**. On the Box Report Menu select **Box History Report**

This provides for obtaining a report of all boxes currently Checked Out and/or all boxes that were previously checked out and returned for a specified range of dates.

You can create a report for all boxes or a single box (using box number) or for all individuals or a single individual (using their name).

Box History Reporting

This process will show Box activity occurring during the dates specified.

For All Boxes

For a Specific Box

For all Individuals

For a Specific Individual

Just Boxes Currently Checked Out

Include History

Please enter the range of Dates to be included:

Beginning Date

Ending Date

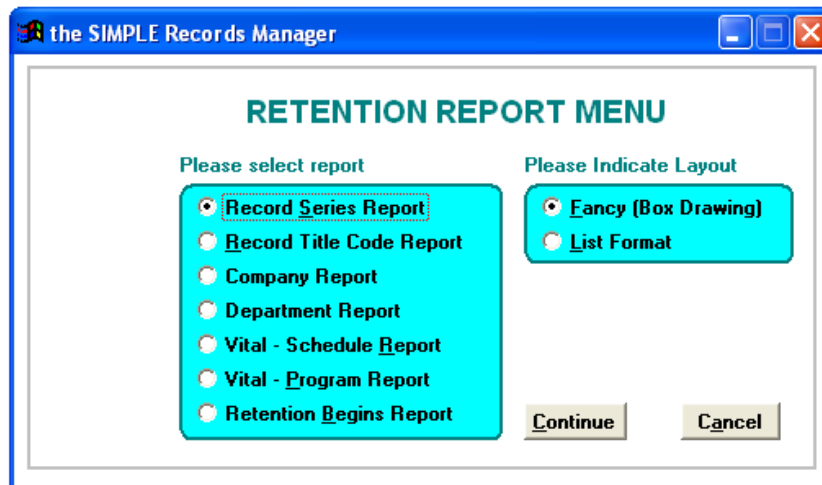
Continue Cancel

## Boxes without destruction dates report

This report lists all boxes with blank destruction dates. It can be limited to one department or a range of departments.

## Retention Reports

Having selected retention reports the following retention report menu is presented.



- Record Series Report
- Record Title Code Report
- Company Report
- Department Report
- Vital - Schedule Report
- Vital - Program Report
- Retention Begins Report

- Fancy (Box Drawing)
- List Format

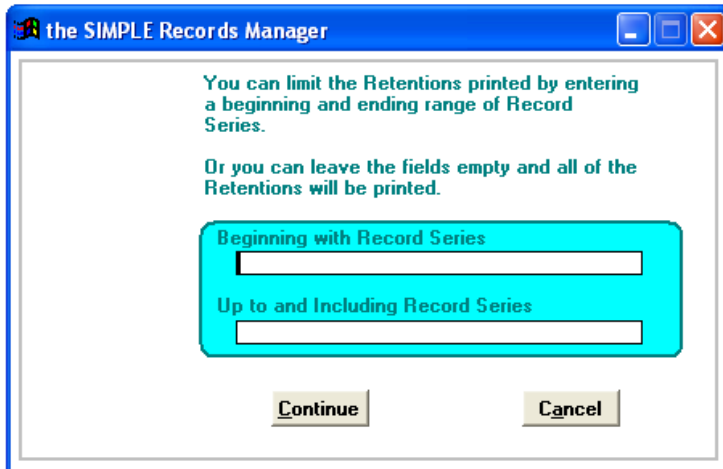
1. Select which report you want.

2. Select the style of the report

3. Click **Continue**.

### Record Series Report

1. From the **Retention Report Menu**, select the **Record Series Report** radio button.
2. Select the report format, Fancy or List.
3. Click **Continue** to go to the next screen or **Cancel**.



4. Enter the beginning record series.
5. Enter the ending record series.
6. Click **Continue** to go to create the report or **Cancel**.

### Record Title Code Report

1. From the **Retention Report Menu**, select the **Record Title Code Report** radio button.
2. Select the report format, Fancy or List.
3. Click **Continue** to go to the next screen or **Cancel**.

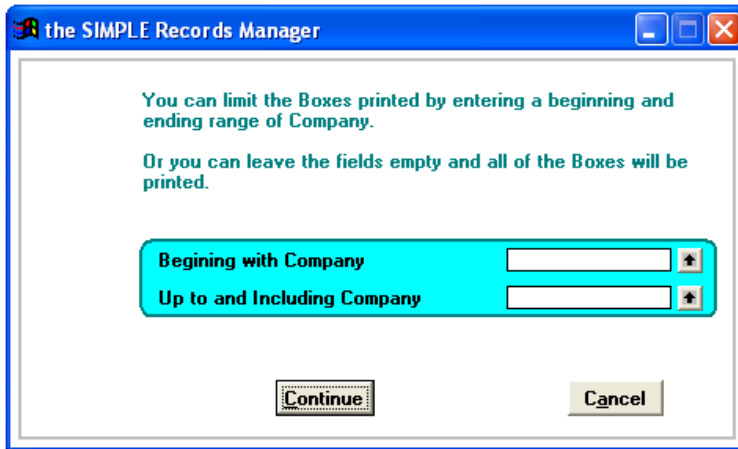


4. Enter the beginning record title code.
5. Enter the ending record title code.
6. Click **Continue** to go to create the report or **Cancel**.

### Company Report

1. From the **Retention Report Menu**, select the **Company Report** radio button.
2. Select the report format, Fancy or List.

3. Click **Continue** to go to the next screen or **Cancel**.



The screenshot shows a dialog box titled "the SIMPLE Records Manager". It contains the following text: "You can limit the Boxes printed by entering a beginning and ending range of Company." and "Or you can leave the fields empty and all of the Boxes will be printed." Below this text are two input fields: "Beginning with Company" and "Up to and Including Company", each with a small arrow icon to its right. At the bottom of the dialog are two buttons: "Continue" and "Cancel".

4. Enter the beginning company name.
5. Enter the ending company name.
6. Click **Continue** to go to create the report or **Cancel**.

### Department Report

1. From the **Retention Report Menu**, select the **Department Report** radio button.
2. Select the report format, Fancy or List.
3. Click **Continue** to go to the next screen or **Cancel**.



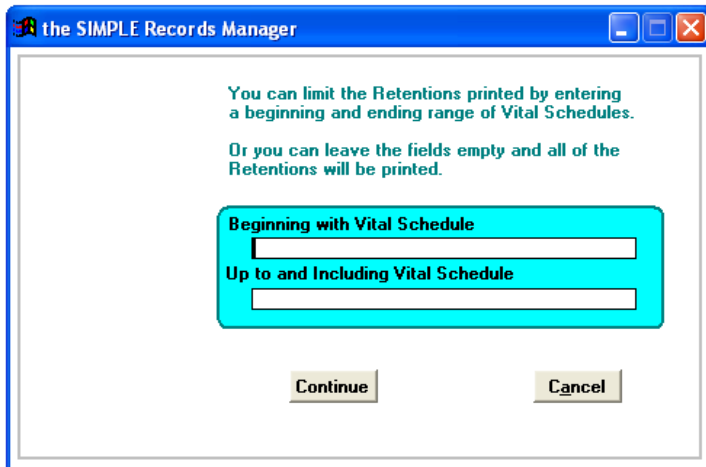
The screenshot shows a dialog box titled "the SIMPLE Records Manager". It contains the following text: "You can limit the Boxes printed by entering a beginning and ending range of Department." and "Or you can leave the fields empty and all of the Boxes will be printed." Below this text are two input fields: "Beginning with Department" and "Up to and Including Department", each with a small arrow icon to its right. At the bottom of the dialog are two buttons: "Continue" and "Cancel".

4. Enter the beginning department name.
5. Enter the ending department name.
6. Click **Continue** to go to create the report or **Cancel**.

### Vital Schedule Report

1. From the **Retention Report Menu**, select the **Vital Schedule Report** radio button.
2. Select the report format, Fancy or List.
3. Click **Continue** to go to the next screen or **Cancel**.

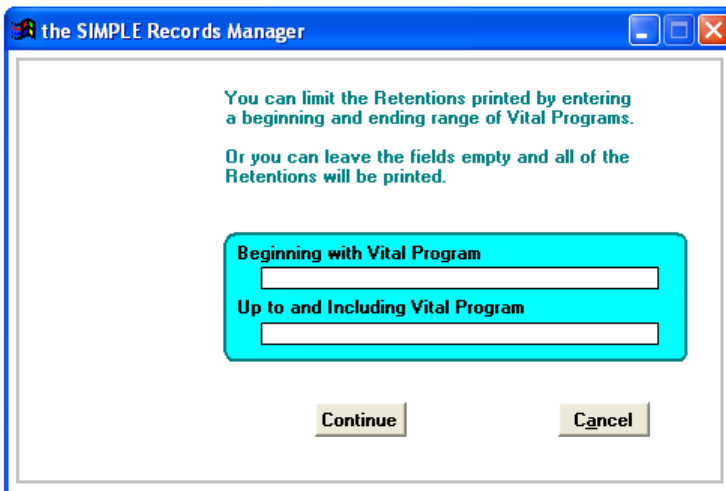




4. Enter the beginning Vital Schedule.
5. Enter the ending Vital Schedule.
6. Click **Continue** to go to create the report or **Cancel**.

### Vital Program Report

1. From the **Retention Report Menu**, select the **Vital Program Report** radio button.
2. Select the report format, Fancy or List.
3. Click **Continue** to go to the next screen or **Cancel**.



4. Enter the beginning Vital Program.
5. Enter the ending Vital Program.
6. Click **Continue** to go to create the report or **Cancel**.

### Retention Begins Report

1. From the **Retention Report Menu**, select the **Retention Begins Report** radio button.
2. Select the report format, Fancy or List.
3. Click **Continue** to go to the next screen or **Cancel**.



4. Enter the beginning Record Series Begins.
5. Enter the ending Record Series Begins.
6. Click **Continue** to go to create the report or **Cancel**.

## Chapter 7 Key Word Searching

This very powerful feature allows you the flexibility of entering your information with fewer restrictions. The Key Word Search Menu includes the following file and box fields (the expanded text field is also known as the memo field):

Key Word Searching Menu

Please indicate which fields you want searched.

Company Id :

Files - Major

Files - Minor

Files - Expanded Text

Files - Company

Box - Box Contents

Box - Expanded Text

Box - Company

Please indicate what it is you want searched.

1. Enter a company to limit the search or leave the company field blank to search all companies.
2. Choose which fields to search by clicking on each field to be included in the search. Notice that when selected an "x" is placed in the box. To remove an "x", click on the item a second time.
3. Enter the search word or phrase in the field(s) on the right.
4. Click **Continue**. SIMPLE searches the fields checked and display the results in one of the following two screens.

## Search – Files

the SIMPLE Records Manager

**File Number**  **Key Word Search - Files Selected**

**Search For**

**Company**

**Department**

**New Date**  **Destroy Date**  **File Location**

**From Date**  **To Date**   **Open** F2 - Remembers Key Fields  
 **Close** F3 - Refresh Key Fields

**Major**

**Minor**

**Matter No.**  **Id No.**  **Box Number**

**Box Location**

**Top** **Prev** **Next** **End** **Locate** **Edit** **Delete** **Print** **Close**

**Check File Out** **Wait List** **See File History**

This screen appears when SIMPLE finds FILE matching items. You then can do many of the same functions that you would do from the File Information Screen (e.g. Check File In & Out, Edit, Delete, etc.).

## Search - Boxes

the Simple Records Manager

**Box Number**  **Key Word Search - Boxes Selected**

**Search For**

**Company**

**Department**

**Date Received**  **Box Contents**

**From Date**  **Record Title**

**To Date**  **Box Location**

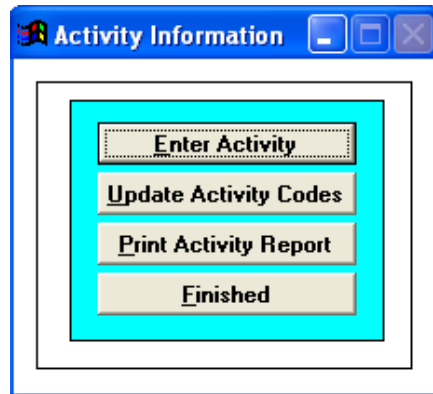
**Destroy Date**  **Box Size**  F2 - Remembers Key Fields  
F3 - Refresh Key Fields

**Top** **Prev** **Next** **End** **Locate** **Edit** **Delete** **Print** **Close**

**Check Box Out** **Wait List** **Destroy Box** **See Box History** **See Files**

This screen appears when SIMPLE finds BOX matching items. You can then proceed to do many of the same functions that you would do from the Box information Screen (e.g. Check Box In & Out, Edit, Delete, etc.)

## Chapter 8 Activity Tracking



Activity Tracking provides for summarizing all records center activity, including special events you describe and record. This feature is also known as Department Charge Back.

The SIMPLE Records Manager accumulates the following activities. You do not need to record them as they occur on a day-to-day basis.

These Activities are:

FILES – RECEIVED FOR STORAGE	BOXES – RECEIVED FOR STORAGE
FILES – CHECKED OUT	BOXES – CHECKED OUT
FILES – RETURNED	BOXES - RETURNED BOXES - DESTROYED

Ask SIMPLE to automatically count these events for a specified range of dates.

To record an Activity click **Add**. To update a previously entered Activity, click **Edit**, etc.

### Enter Activity

1. From the **Activity Information** screen, click **Enter Activity**.

- Record the various events as they occur.

## Locate an Activity

- After entering specific information, click **Locate** to display the Locate Record.

Workorder	Salestax	Total	C_company	C_dept	C_billcode	C_billdesc	C_quantity	C_rate	C_date	C_totcost	C_time
476	0.00	200.00	RMS		00100	FILES - RECEIVED FOR STORAGE	100.0000	2.0000	02/22/2013	200.00	0.00
501	0.00	17.50	RMS	ACCT	00105	FILES - CHECKED OUT	10.0000	1.7500	02/20/2013	17.50	0.00
665	0.00	39.00	RMS	ACCT	PICKUP	PICK BOXES	12.0000	3.2500	02/21/2013	39.00	5.00
022513	0.00	42.30	RMS	ACCT	00115	FILES - INDEXED	94.0000	0.4500	02/25/2013	42.30	0.00

- To select a record, click the mouse on the desired record.
- Close the browse window by clicking outside of the browse window or by clicking **Esc**.

## Add an Activity

This button allows you to add a new record into the database.

Click **Add**. The cursor moves to the first field so that you can start entering your new information.

## Edit an Activity

**Edit** allows you to make changes to the record that is on the screen. After clicking **Edit** the cursor moves to the first field on the screen, allowing you to change the information.

## Delete an Activity

This button deletes the record you are viewing on the screen.

## Field Explanations

**Client:** Enter the company to which this activity applies, or click on the Up Arrow to the right of the company number field. This is a required field and cannot be left blank.

**Department:** Enter the department to which this activity applies, or click on the Up Arrow to the right of the department number field.

**Date:** Enter the date to which this activity applies. This is a required field and cannot be left blank.

**Billing Code:** Each Activity is given a code (number), which is then used to locate and update the activity as it occurs. The “scroll window” allows you to pick the desired Activity Code. If you do not see the desired activity code, you may need to leave this function and add the code. To add the code, select Update Activity Codes from the Activity Information Menu.

Double click on the desired code to select it. SIMPLE automatically enters the Description, Units, Standard Time and Standard Cost fields. The Standard Time and Standard Cost fields can be overridden.

**Description:** The above operation automatically enters the description. You now have the ability to make any changes that might apply to this specific entry. Or, you may click **Tab** to accept the data and move to the next field.

**Units/Unit of Measurement:** A precisely defined quantity in terms of which measurement of quantities of the same kind can be expressed. It is entered automatically by in the input of the billing code.

**Quantity:** Enter the Quantity that applies. This is a required field and cannot be left blank.

Having entered the above data, SIMPLE automatically calculates the Total Amount, Total Time and Total Cost as follows:

Total Amount = Quantity times Rate

Total Time = Quantity times Standard Time  
Total Cost = Quantity times Standard Cost

You are able to override these calculations by changing any of the following four fields:

Standard Time    Standard Cost

Total Time        Total Cost

**Standard Time:** Changing the standard time automatically recalculates the total time. The

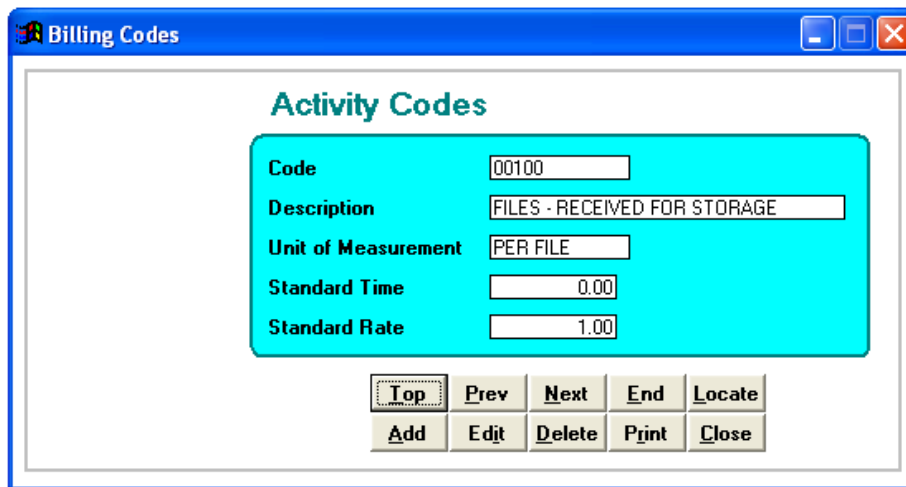
answer should always be a function of Quantity times Standard Time equals Total Time. If you change the Standard time, SIMPLE recalculates the answer.

**Standard Rate:** If you change the Standard Cost, the Total Cost is recalculated. The answer should always be a function of Quantity times Standard Cost equals Total Cost. If you change the Standard, SIMPLE automatically recalculates the total.

**Total Time:** If you change the Total Time, the Standard Time is recalculated (just for this one entry): Quantity time Standard Time equals Total Time. If you change the Total Time the system recalculates the Standard Time for you.

**Total Cost:** If you change the Total Cost, SIMPLE recalculates the Standard Cost (for this one entry): Quantity times Standard Cost equals Total Cost.

## Update Activity Codes



The screenshot shows a window titled "Billing Codes" with a sub-header "Activity Codes". The form contains the following fields:

Code	00100
Description	FILES - RECEIVED FOR STORAGE
Unit of Measurement	PER FILE
Standard Time	0.00
Standard Rate	1.00

Below the form are two rows of buttons:

Top	Prev	Next	End	Locate
Add	Edit	Delete	Print	Close

Print out a list of the Activity Codes and then update the Codes to reflect Units, Standard Time and Standard Rate you want associated with each of these events. Of course you can add as many additional activity codes as you like.

As it relates to time, if you enter whole numbers like 10,000, 20,000, etc. the person getting the report should think in terms of minutes, whereas, if you entered .1, .2, the person reviewing the report should think in terms of an hour. Thus you need to decide how you want to record these events.

**Suggestion:** Enter the time as parts of an hour. Thus 1/2 hour would be .5. This makes it easier to understand the Department Totals.

When finished, you can create and enter your own custom codes to allow for recording differing events. Think how you might use this to track other activities you may want to account for. Time Management Studies is a possibility.



## Print Activity Reports

1. Select the Company, Beginning Date, Ending Date and any or all other options desired.
2. Click **Continue** to create the report or **Cancel**.

## Field Explanations

**Company:** Using the Up Arrow, select the company. This is a required field.

**Beginning Date:** Enter the beginning time period. This is a required field.

**Ending Date:** Enter the ending time period. This is a required field.

**Department:** This is an optional field. If left blank, the report includes all departments. Using the Up Arrow you may select a single department.

**Check Boxes:** Indicate which items are automatically calculated for the report.

Check Those to Be Automatically Calculated	
<input checked="" type="checkbox"/> <b>New Files Received</b>	<input checked="" type="checkbox"/> <b>New Boxes Received</b>
<input checked="" type="checkbox"/> <b>Files Checked Out</b>	<input checked="" type="checkbox"/> <b>Boxes Checked Out</b>
<input checked="" type="checkbox"/> <b>Files Returned</b>	<input checked="" type="checkbox"/> <b>Boxes Returned</b>
	<input checked="" type="checkbox"/> <b>Boxes Destroyed</b>

**New Files Received:** When checked, SIMPLE counts all files received with the specified dates, by department and date. When the report is printed you see one line printed showing the total files received for each date involved.

**Files Checked Out:** When checked, SIMPLE counts all files checked out with the specified dates, by Department and Date. The report reflects the total files checked out for each date involved.

**Files Returned:** When checked, SIMPLE counts all files checked in the specified time period, by department and date. The report prints one line showing the total files checked in for each date involved.

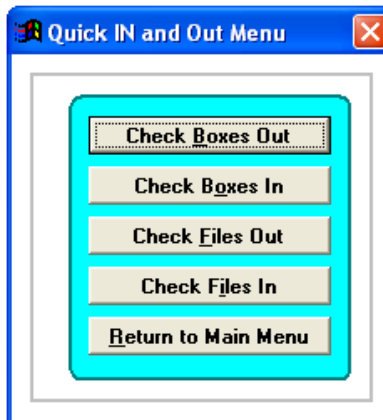
**New Boxes Received:** When checked, SIMPLE counts all boxes received within the dates specified, by department and date. The report prints one line showing the total boxes received for each date involved.

**Boxes Checked Out:** When checked, SIMPLE counts all boxes checked out within the time frame specified, them by department and date. The report prints one line reflecting the total boxes checked out for each date involved.

**Boxes Returned:** When checked, SIMPLE counts all boxes returned, by department and date. The report shows one line for the total boxes returned for each date involved.

**Boxes Destroyed:** When checked, the SIMPLE counts all boxes destroyed within the specified time frame, by department and date. The report prints the total boxes destroyed for each date involved.

## Chapter 9 Quick In and Out

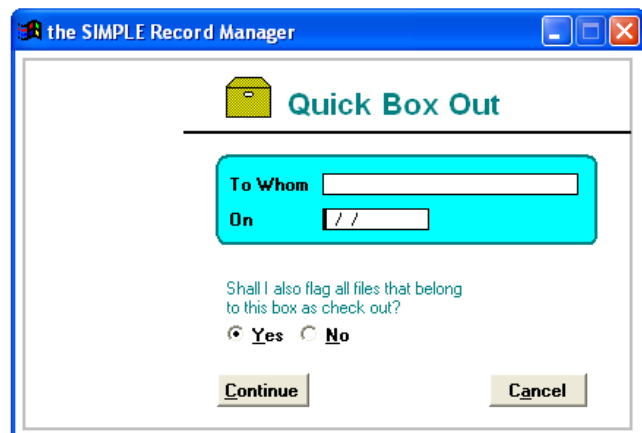


This feature allows you to quickly check in/out boxes and files. From the Main Menu click **Quick In and Out**.

Quick In and Out is also designed for use with a Stationary Bar Code Reader. Contact RMS at [info@recordmanagementsoftware.com](mailto:info@recordmanagementsoftware.com) or 914.725.5900 for comparative prices and compatibility prior to purchasing new Bar Coding equipment.

### Quick Boxes Out

1. From the Quick In and Out Screen, click **Check Boxes Out**.
2. Enter the name of the individual to whom these boxes are being checked out. The date field is populated with today's date and you may change it.
3. Select whether to flag the files that belong to this box as also being checked out.
4. Click **Continue**.



the SIMPLE Records Manager

Quick Boxes Out

Box Number

Box Contents

Company  Department

Date Received  Destroy Date

From Date  To Date

Finished

5. Enter each box number that is being checked out, one at a time. As each new number is entered SIMPLE checks to be sure it is a valid box number and displays the box's information. If the entered box number is a valid number, SIMPLE checks the box out.
6. If you are using a stationary bar code reader, scan in the bar code for each box being checked out.
7. When you are finished checking boxes out click **Finished**.

## Quick Boxes In

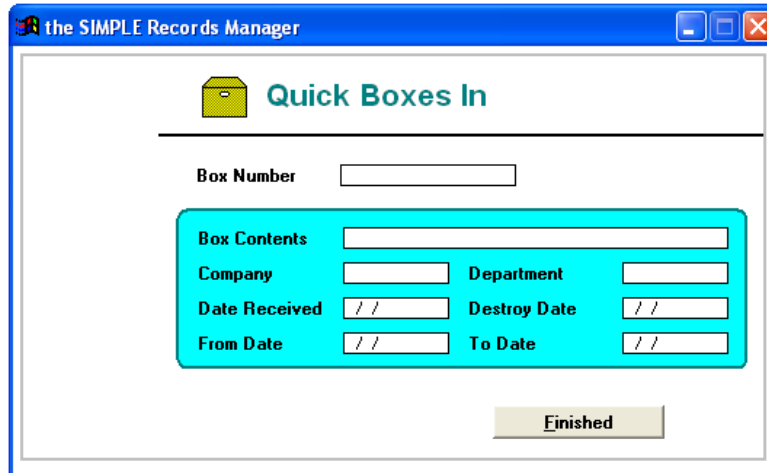
1. From the Quick In and Out Screen, click **Check Boxes In**. The date is populated with today's date and you may change it.
2. Click **Continue**.

the SIMPLE Records Manager

Quick Box In

Date Checked IN:

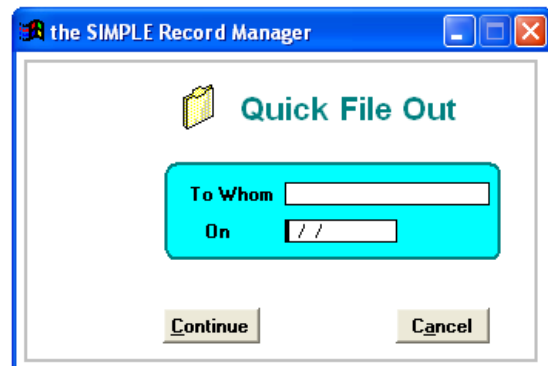
Continue Cancel



3. Enter each box number being checked in, one at a time. As each box number is entered SIMPLE checks to be sure it is a valid box number and displays the box's information. If the entered box number is a valid number, the system checks the box in.
4. If you are using a stationary bar code reader, scan in the bar code for each box being checked in.
5. When you are finished checking boxes in, click **Finished**.

### Quick Files Out

1. From the Quick In and Out Screen click **Check Files Out**.
2. Enter the name of the individual to whom the files are being checked out. The date is populated with today's date and you may change it.
3. Click **Continue**.



the SIMPLE Records Manager

Quick Files Out

File Number

Major

Minor

Matter No.  Id No.

Company  Department

New Date  Destroy Date

From Date  To Date

Finished

4. Enter each file number that is being checked out, one at a time. As each file number is entered the system checks to be sure it is a valid file number and displays the file's information. If the entered file number is a valid number, SIMPLE checks the file out.
5. If you are using a stationary bar code reader, scan in the bar code for each file being checked out.
6. When you are finished checking files out click **Finished**.

## Quick Files In

1. From the Quick In and Out Menu, click **Check Files In**. The date is populated with today's date and you may change it.
2. Click **Continue**.

the SIMPLE Records Manager

Quick File In

Date Checked In: 06/09/2006

Continue Cancel

the SIMPLE Records Manager

Quick Files In

File Number

Major

Minor

Matter No.  Id No.

Company  Department

New Date  Destroy Date

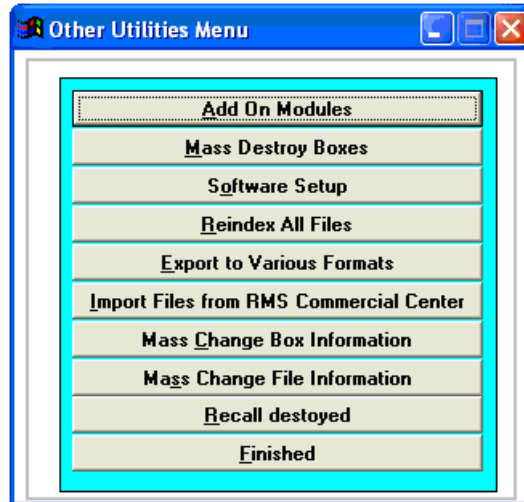
From Date  To Date

Finished

3. Enter each file number that is being checked in, one at a time. As each file number is entered SIMPLE checks to be sure it is a valid file number and displays the file's information. If the entered file number is a valid number, SIMPLE checks the file in.
4. If you are using a stationary bar code reader, scan in the bar code for each file being checked in.
5. When you are finished checking files in click **Finished**.

## Chapter 10 Other Utilities

From the Main Menu click **Other Utilities**.



### Add On Modules

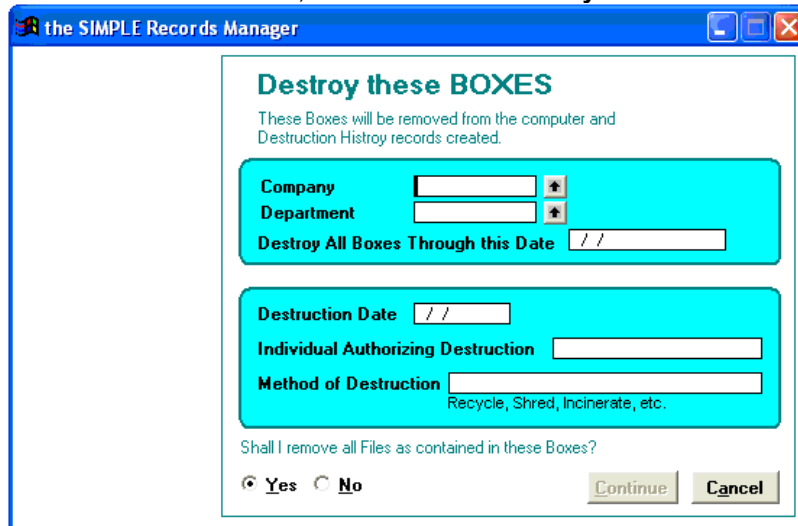
At the present time there are two optional modules available:

- The Portable Bar Code Module, See Chapter 13
- The Microfilm Module, See Chapter 14

Once installed, these modules are accessed from buttons on the main menu.

### Mass Destroy Boxes

From the Main Menu click **Other Utilities**, and then **Mass Destroy Boxes**.

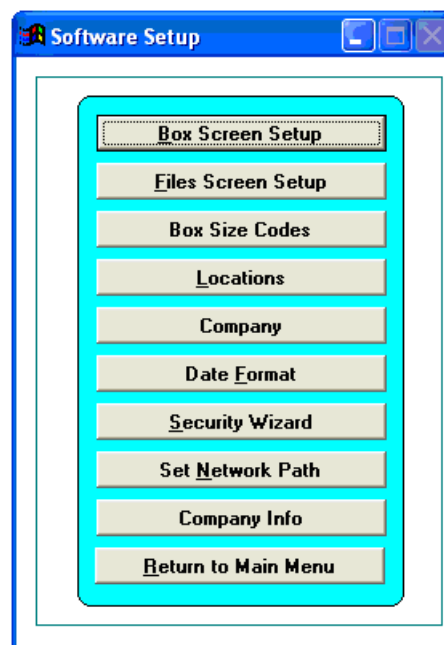




1. Select all boxes for a specific company and department, and all boxes whose destroy date is prior to or the same as the date entered, and are Checked IN. The records are removed from the active inventory and put into the Boxes Destroyed History File.
2. Optionally, if you choose **Yes** to “*Shall I remove all Files as contained in the Boxes?*”, SIMPLE removes all files then being stored in each box. If you specify **No**, the record of the file remains in the database, with destruction noted.
3. Click **Continue**. SIMPLE prints or saves to file the Certificate of Destruction and a Destruction Pull List.

## Software Setup

From the Main Menu click **Other Utilities**. From the Other Utilities Screen click **Software Setup**.



## Box Screen Setup

1. From the Software Setup screen click **Box Screen Setup**. This feature allows you to change the names of each field related to box information throughout the system and to indicate if you want the system to suggest the next box number each time a box is added. The text in *red* represents the individual field names that appear on the Box Information Screen.
2. Type over the red field names to change to whatever makes sense to you.
3. Check the **Automatically Suggest Next Box Number** if you want SIMPLE to give you the next Box Number when adding new Boxes. You can also enter a starting Box Number.
4. When you are finished making changes click **Return the Setup Menu**.

## File Screen Setup

1. The text in *red* represents the individual field names that appear on the File Information Screen. Type over the red field names to change to whatever makes sense to you.
2. Check the **Automatically Suggest Next File Number** if you want SIMPLE to give you the

next file number when adding new files. You can also enter a starting file number.

3. When you are finished making changes, click **Return to Setup Menu**.

**Note** – For LAN users, accessing these screens require exclusive use of SIMPLE. All other users must log out before you can modify box and file screen setups.

## Box Size Codes

1. From the Software Setup window click **Box Size Codes**. From here you can setup your box size codes. The box size refers to the box size code that you will use when entering new boxes. The name can be used to give a better description to the box size code. Cubic Feet allows you to tell the system how many cubic feet this box size occupies.

## Company

1. From the Software Setup screen click **Company**. From here you can setup your Companies.
2. Click **Add Department** to Add departments to each company.

## Department

the SIMPLE Records Manager

**Department** Company: RMS

Department: ACCT

Name: ACCOUNTING

Contact: BOB MILLER

Phone: (914)583-6000 Fax: (914)683-4521

Top Prev Next End Locate Add Edit Delete Print Close

1. From the Company screen, find the company that you want to **Add Departments** to. Each Department is connected to a specific company. This is a very important relationship and provides for having the same department numbers within each of your companies.
2. Enter information for each department.
3. When you are finished, click **Close** to return to the company screen.

## Locations

LOCATIONS

Location: 10-B-004

Box Size: 1

Shelfname: ARCHIVE

Max Shelf: 12

Top Prev Next Bottom Locate Print Add Edit Delete Close

1. From the Software Setup screen, click **Locations**.
2. Click **Print** to automatically refresh the Location Master File using the current box inventory and to print a report of all locations.

## Field Explanations

**Location:** This is a 15 character field used to identify the shelf, etc. where the box is (or will be) stored.

**Box Size Code:** This is a 4 character field used to identify the size of the box.

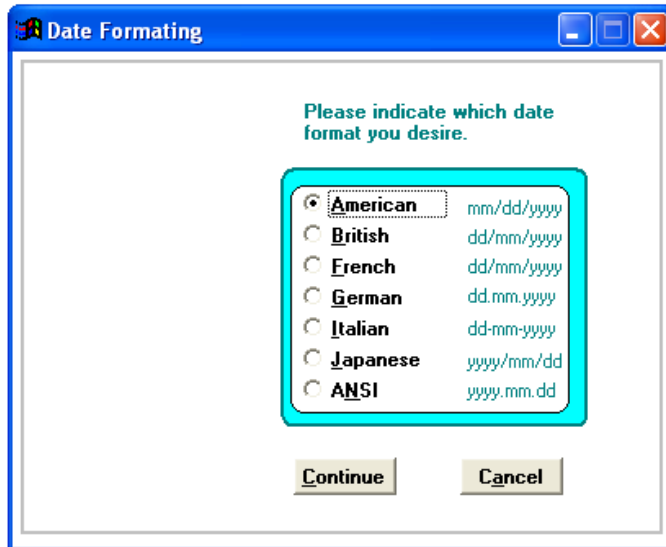
Example: STD  
TRAN

**Shelf name:** This is a 20 character field used to describe the type of box.

Example:       STANDARD SIZE  
                  ARCHIVE CARTON

**Max Shelf:** This is the maximum number of cartons that the shelf will hold.

### Date Format

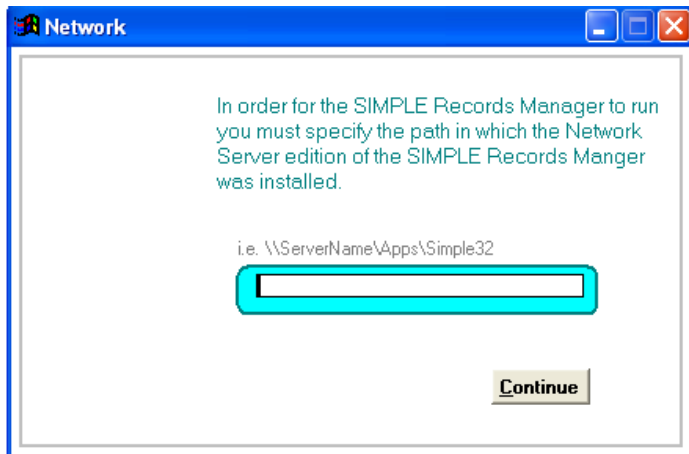


1. From the Software Setup screen click **Set Date Format**. This allows you to specify which country's date format you want to use with the system.
2. Make your selection.
3. Click **Continue** to return to the Software Setup window.

### Security Wizard

Please see Chapter 11- Security Wizard for more information on the Security Wizard.

### Set Network Path



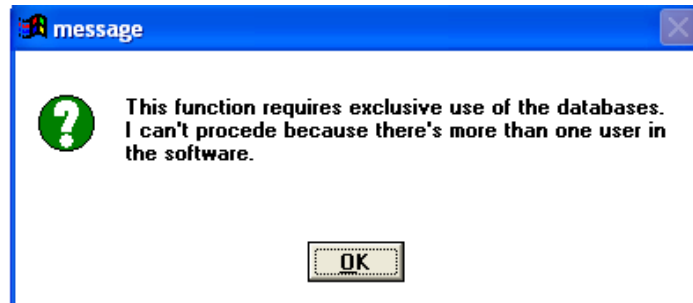
This feature is only available to those stations with the LAN version.

1. Click **Set Network Path** on the Software Setup screen.
2. Enter the full path of where the Network Server edition of the SIMPLE Records Manager is installed
3. Click **Continue**.

## Reindex All Files

Index files are built on each database in order to display the information in the database in different sequences, such as box number order. Sometimes these index files become corrupt or become “broken”. When index files are “broken,” information sometimes disappears. You will look for an existing box and will not be able to find it. Don’t worry your data is not lost.

1. To re-index the databases click **Other Utilities** button from the Main Menu.
2. Click **Reindex All Files** from the Other Utilities Window.

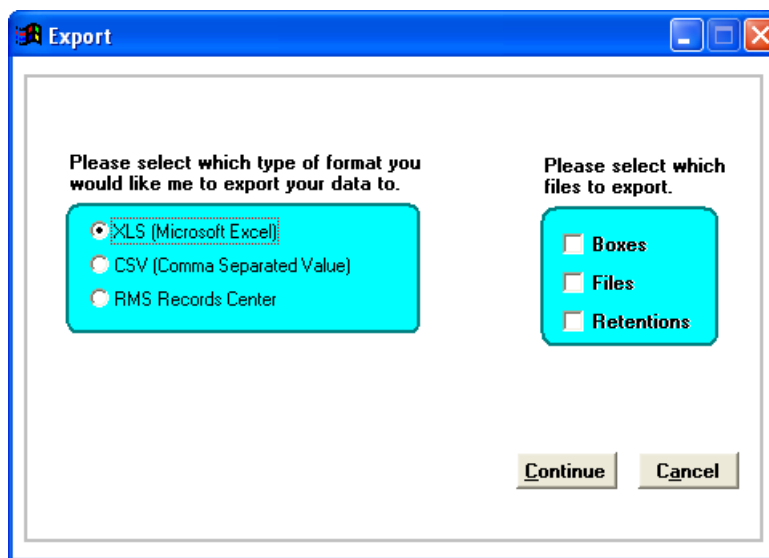


**Note:** For those running on a LAN (Local Area Network), all other users of the SIMPLE Records Manager must first quit the system. Re-indexing the databases requires exclusive use of the databases.

## Export to Various Formats



1. From the Other Utilities window click **Export to Various Formats**. The Export Filter provides a means to limit the data to be exported.
2. To export everything in the database only check the first box.
3. To limit the data being exported for Just One Company, use the up arrow to view your choices and select the Company.
4. To further limit the data, select Just One Company and One Department using the Up Arrows to aid in the selection of company and department.
5. Range of Date Received works in conjunction with the above choices to narrow down the data being exported to a particular time frame.
6. Click **Continue**. The Export screen displays, allowing you to export the box, file and/or retention information.



7. Click one radio button to select the format and check the desired check box (boxes) for the data to be exported.

### Microsoft Excel

**XLS** Select XLS to create a spreadsheet you can use in Microsoft Excel. Each field in the selected database becomes a column in the spreadsheet; each record becomes a row in the spreadsheet. An .XLS file name extension is assigned to the newly created spreadsheet file unless you specify a different extension.

**CSV** Comma Separated Value Format (Text)  
 A CSV (Comma Separated Value) file is an ASCII text file in which records are delimited with a comma. This file may be opened using Microsoft Excel.

## Exporting to RMS Commercial Centers


This is a special feature aids in storing your records off-site at a RMS Commercial Records Center. There are more than 60 RMS Commercial Records Centers using our Archive Manager commercial record management system. If you are storing your records with one of these RMS Commercial Records Centers you can utilize this feature to create files containing the box and file information pertaining to the boxes that are being sent to storage. These RMS Commercial Records Centers can in turn accept the data and process the information into their computer thus reducing (or in many cases, eliminating) your data entry costs.

1. From the Other Utilities window click **Export to Various Formats**.
2. From the Export screen select RMS Record Center.
3. Click **Continue**.

The screenshot shows a Windows-style dialog box titled "transfer" with a blue title bar. The main content area has a white background and is titled "EXPORT BOXES TO STORAGE" in green. Below the title, it says "The following fields can be automatically updated. Please enter the information you want in each field." There are two columns of input fields. The left column is under the heading "As it relates to each BOX:" and contains three fields: "Box is:" (with a dropdown arrow), "On:" (with a date field containing " / /"), and "Box Location:" (with a text box). The right column is under the heading "As it relates to each FILE:" and contains three fields: "File is:" (with a dropdown arrow), "On:" (with a date field containing " / /"), and "File Location:" (with a text box). At the bottom, there are two checked checkboxes: "Update Each Box Going To Storage" and "Update Each File For the Boxes Going to Storage". To the right of these checkboxes are two buttons: "Continue" and "Cancel".

4. Update each box and file to be exported by clicking on either or both of the following items.
  - Update Each Box Going To Storage**
  - Update Each File For the Boxes Going to Storage**
5. Enter the information that you would like SIMPLE to change in each box and file that you export to disk.
6. Click **Continue**.
7. Click **OK**.





## BOXES Transferring To Storage

---

Your Box Number

Storage Box Number

Your Client ID Number

Box Contents

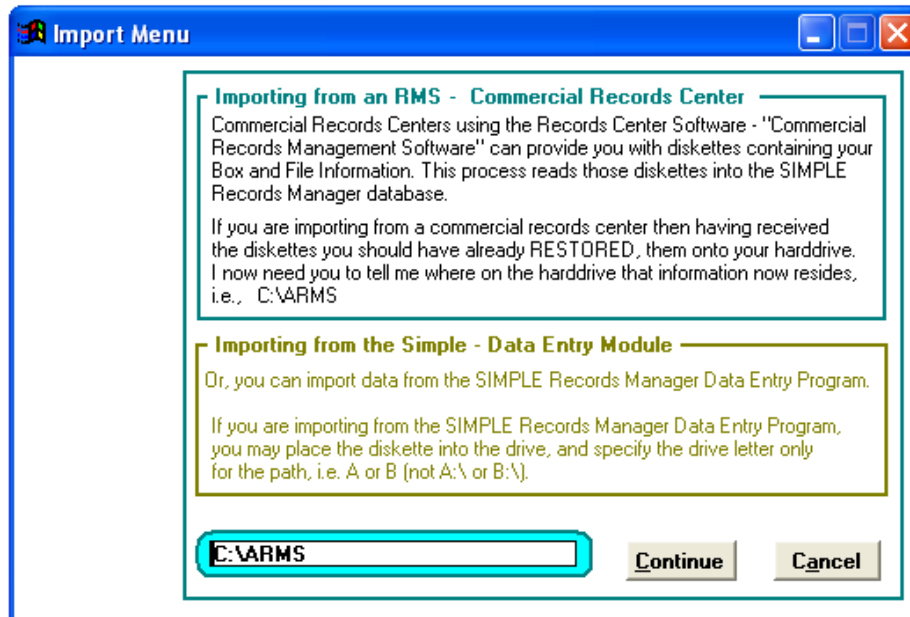
Company  Department

Box Date  // Destroy Date  //

Beginning Date  // Ending Date  //

8. Enter the number of the first box that you would like to transfer. If you enter a valid box number the system displays the information for that box.
9. Enter the storage number provided by the Records Center, and your Client ID Number.
10. Click **Transfer to Storage** to transfer the box to the diskette.
11. Repeat the process for additional boxes.
12. Click **Finished**.
13. When you are finished a browse window displays listing all the boxes that you transferred to storage. If there are any mistakes you can correct them or delete them by clicking the narrow button at the start of each row (the button changes to black, confirming the record will not be transferred).
14. When you have finished, click **Esc** to close the browse window.
15. After the browse window closes, SIMPLE prints a Box and File Transmittal Report that can be sent with the disk to the Records Center.

## Import Files from RMS Commercial Center



1. From the Main Menu click **Other Utilities**.
2. From the Other Utilities window click **Import files From RMS Commercial Center**. This screen allows you to import from two separate system packages, the SIMPLE Records Manager Data Entry and the RMS Archive Manager Commercial Record Management Software.

## the SIMPLE Records Manager Data Entry Module

This software package is similar to the SIMPLE Records Manager, but only allows you to enter boxes and files and print limited reports. This package is used by computers not connected to the network. For more information regarding the SIMPLE Records Manager Data Entry contact Record Management Software at [info@recordmanagementsoftware.com](mailto:info@recordmanagementsoftware.com) or 914.725.5900.

See Chapter 15 for instructions on the Data Entry Software.

## RMS Commercial Center

This is another special feature to aid getting your initial file and box information. Like the prior option, our affiliated commercial records centers can provide you with your entire box and file information that is being stored in their computer. This information can be loaded into The SIMPLE Records Manager.

### How The Process Works:

The RMS Commercial Records Center provides you with data containing your box and file information. This data has been exported from Archive Manager.

1. Copy the data into a directory such as C:\ARMS. This is the default import directory, but you may change it to the correct folder where the data to be imported resides.
2. The default has already been set to C:\ARMS. If you have in fact restored the data to

drive C:\ARMS just click **Continue**. However, if you restored the data to another drive (D:, E:, F:, etc.) enter the correct drive and directory and then click **Continue**.

The system proceeds to load the box and file information into the SIMPLE Records Manager. When it finishes it will return you to the Main Menu.

### Importing Pre-existing Data

If you have box and file information residing in some other electronic format, i.e., Excel, Access, dBase, etc., it may be converted into the SIMPLE databases. Please contact Record Management Software at [support@recordmanagementsoftware.com](mailto:support@recordmanagementsoftware.com) or 914.725.5900 and we will be glad to provide a quote.

### Mass Change Box Information

This feature provides for finding boxes in your box inventory using one or more pieces of information and then changing information in one or more fields.

WARNING!! Be sure to take a backup prior to making any mass changes as once done, there is no Undo Edit.

Field Name	Compare On	Change To
Company	<input type="checkbox"/> - [ ] ↑	<input type="checkbox"/> - [ ] ↑
Department	<input type="checkbox"/> - [ ] ↑	<input type="checkbox"/> - [ ] ↑
Record Title	<input type="checkbox"/> - [ ] ↑	<input type="checkbox"/> - [ ] ↑
Box Contents	<input type="checkbox"/> - [ ]	<input type="checkbox"/> - [ ]
Date Received	<input type="checkbox"/> - [ ]	<input type="checkbox"/> - [ ]
From Date	<input type="checkbox"/> - [ ]	<input type="checkbox"/> - [ ]
To Date	<input type="checkbox"/> - [ ]	<input type="checkbox"/> - [ ]
Destroy Date	<input type="checkbox"/> - [ ]	<input type="checkbox"/> - [ ]
Box Location	<input type="checkbox"/> - [ ]	<input type="checkbox"/> - [ ]
Box Size	<input type="checkbox"/> - [ ] ↑	<input type="checkbox"/> - [ ] ↑

^ Check if field is Blank                      ^ Check To Erase this Field

#### Compare On

This is where you enter the information needed to find the boxes. This is referred to as the "search argument."

You can use one or more of the fields to help in isolating just those boxes needing editing.

**Note:** You can also include fields that are presently empty by clicking on the box to the left of the

field which is now blank. In doing so, the computer includes those boxes for which the specified field(s) are empty as well as the other information entered.

Enter the information needed to find the boxes to which changes are to be made.

Example: Find all the Boxes for Company WIDGET and Department 100 that were received on 01/15/2010. Then put PAYROLL RECORDS into the Box Description and "1" into the Box size code field.

### **Change To**

This is where you would enter the new information to be added to those matching boxes.

**Note:** You can also "blank out" fields by clicking on the box to the left of the field to be changed. When doing so, the word ERASE appears in the Change To field. This causes the information in these fields to be removed.

### **Count Matching Boxes**

Having completed the Compare On and Change To sections of the screen, when you click on the Count Matching Boxes button, SIMPLE tells you how many boxes match your search argument.

### **Show Matching Boxes**

This button displays the boxes selected to verify these are the correct boxes to which the changes apply.

1. If you are satisfied you have the correct boxes to which the changes are to be made, then click **Make Changes**.
2. To use this process for just finding boxes enter multiple pieces of information and then click **Show Matching Boxes**. Leave the **Change To** fields blank.
3. When finished click **Cancel**.

### **Mass Change File Information**

This feature provides for finding files in your file inventory using one or more pieces of information and then changing information in one or more fields.

**WARNING!!** Be sure to take a backup prior to making any mass changes as once completed there is no Undo Edit possible.

Field Name	Compare On	Change To
Company	<input type="checkbox"/> - [ ] ↑	<input type="checkbox"/> - [ ] ↑
Department	<input type="checkbox"/> - [ ] ↑	<input type="checkbox"/> - [ ] ↑
New Date	<input type="checkbox"/> - [ / / ]	<input type="checkbox"/> - [ / / ]
From Date	<input type="checkbox"/> - [ / / ]	<input type="checkbox"/> - [ / / ]
To Date	<input type="checkbox"/> - [ / / ]	<input type="checkbox"/> - [ / / ]
Destroy Date	<input type="checkbox"/> - [ / / ]	<input type="checkbox"/> - [ / / ]
File Location	<input type="checkbox"/> - [ ]	<input type="checkbox"/> - [ ]
Box Number	<input type="checkbox"/> - [ ]	<input type="checkbox"/> - [ ]
Box Location	<input type="checkbox"/> - [ ]	<input type="checkbox"/> - [ ]
Major	<input type="checkbox"/> - [ ]	<input type="checkbox"/> - [ ]
Minor	<input type="checkbox"/> - [ ]	<input type="checkbox"/> - [ ]
Matter No.	<input type="checkbox"/> - [ ]	<input type="checkbox"/> - [ ]
Id No.	<input type="checkbox"/> - [ ]	<input type="checkbox"/> - [ ]

^ Check if field is Blank      ^ Check To Erase this Field

### Compare On

Enter the information needed to find the files. You can use one or more fields to help in isolating just those files needing to be changed.

*Example:* Find all of the files for Company Widget and Department 100 that were received on 01/15/ 2010. Put CONTRACTS into the Major Description and ABC100 into the Matter Number field.

**Note:** You can also include fields that are presently empty by clicking on the box to the left of the field which is now blank. In doing so, SIMPLE includes those files for which the specified field(s) are empty as well as the other criteria entered.

### Change To

Enter the new information to be added to those matching files. You can also change information including the verify fields you are searching on, i.e. you can find all of the files belonging to Company WIDGET and change them to Company WINGDING.

**Note:** You can also blank out fields by clicking on the box to the left of the field to be changed.

When doing so, you will see the word ERASE appear in the Change To field. This causes the information in these fields to be removed.

### Count Matching Files

Click **Count Matching Files** after completing the **Compare On** and **Change To** fields. SIMPLE tells you how many files match your search argument.

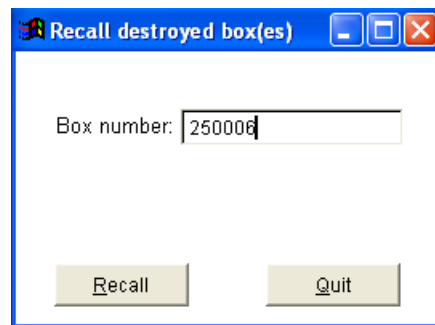
### Show Matching Files

1. Click **Show Matching Files** after completing the **Compare On** and **Change To** fields. SIMPLE shows the files selected, so you can verify that these are the correct files to which the changes apply.

the SIMPLE Records Manager

2. If you are satisfied you have the correct files to which the changes are to applied, click **Make Changes**.
3. You can use this process for just finding files using multiple criteria and then clicking **Show Matching Files**. Leave the **Change To** fields blank and when finished click **Cancel**.

### Recall destroyed boxes

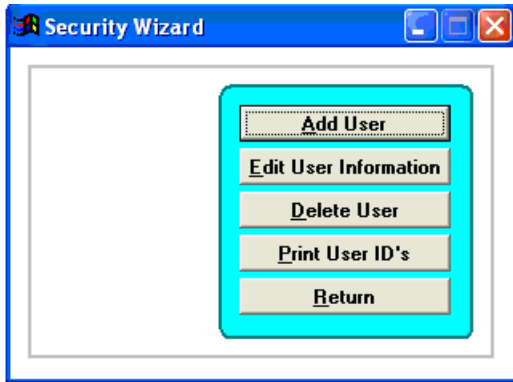


This utility lets you recall boxes that were destroyed in error. Type the box number and click **Recall**. This utility continues allowing for additional boxes until you click **Quit**.

## Chapter 11 Security Wizard

This feature provides two levels of security. The first level manages the menu items each individual has access to. The second restricts each user to a specific company or company and department.

The only individual authorized access to the security functions is the system administrator. Using the special password provided, the system administrator can add, change and delete users, as well as, print a report showing what each individual is authorized to do.



1. From the Main Menu click **Other Utilities**.
2. From the Other Utilities windows click **Software Setup**.
3. From the Software Setup window click **Security Wizard**.

### Add a User



This is the first screen, in a set of screens, used to walk you through Adding a New User.

Enter the User ID. This is typically the user's name.

### Password

1. Enter the password being assigned to this new user. The password should be something easy to remember, but also something difficult for anyone else to figure out.

2. Each check box represents an item on the Main Menu. Check the boxes that correspond to the functions that you want this user to be able to access.
3. Click **Next** to continue specifying options for this user.
4. Click **Finish** to add this user to the system, or click **Cancel** to return to the Software Setup window.

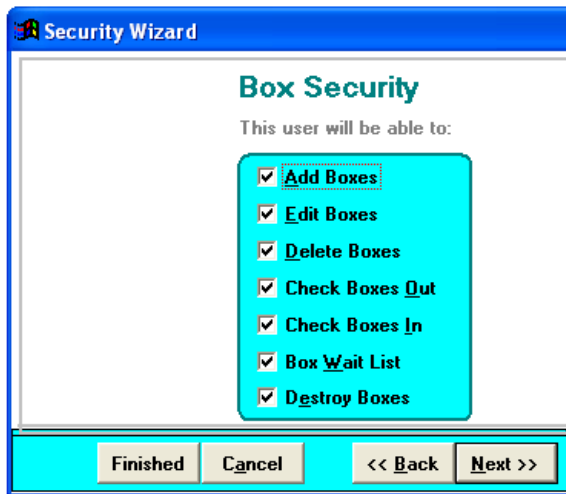
## File Security



This screen allows you to further restrict this user's access. From here you can specify which features the user will be able to access with regard to file information.

1. Select the relevant options.
2. Click **Finished**.

## Box Security



This screen allows you to further restrict this User's access. From here you can specify which features the user will be able to access with regard to box information.

1. Select the relevant options.
2. Click **Finished**.



## Retention Security



This screen allows you to further restrict this User's access. From here you can specify which features the user will be able to access with regard to Retention Information.

Delete Retention Files and Recalculate Destruction Date are tied together. Thus, if the user is not allowed to delete a retention file the user will also not be able to recalculate the destruction date.

1. Select the relevant options.
2. Click **Finished**.

## Utility Security



This screen allows you to further restrict this user's access. From here you can specify which features the user will be able to access with regard to the other utilities.

1. Select the relevant options.
2. Click **Finished**.

## Company/Department Level Security



This screen allows you to further restrict this User's access. From here you can specify which records the user will be able to access throughout the system. The Up Arrows give you a list of the choices. If you do not want to limit access for this individual leave the fields empty.

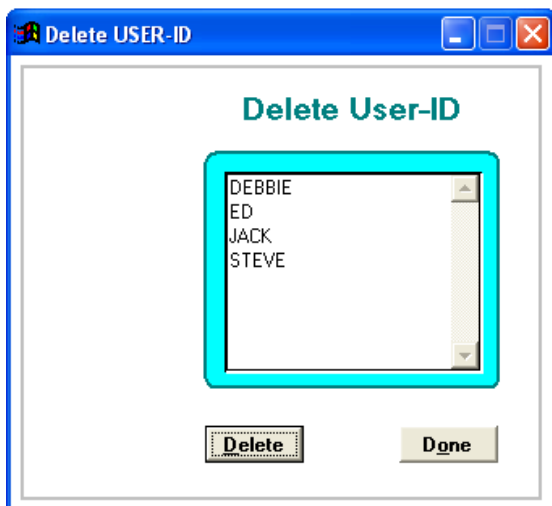
## Edit a User

The process of editing an existing user is very similar to adding a new user. To edit a user's security options,

1. Click **Edit User** button on Security Wizard screen.
2. Select the User's ID from the pull down list.

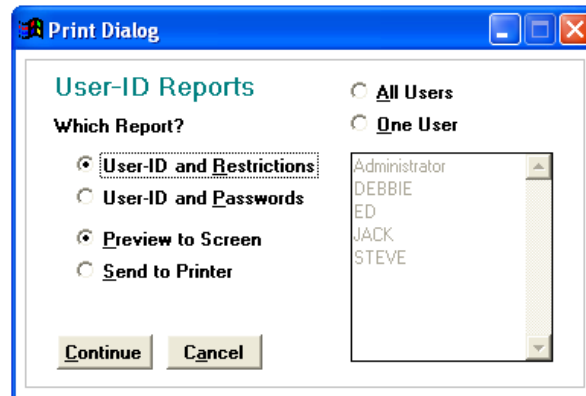
The Edit User screens are identical to the screens used to Add User. For more information refer to Add User in this chapter.

## Delete User



1. Click **Delete User** from the Security Wizard window.
2. Select the desired User ID to delete by highlighting the name. The scroll bar enables you to see more names if the list of users is long.
3. Press **Delete**. The system asks you to confirm your selection.
4. Click **Done** to return to the Software Setup window.

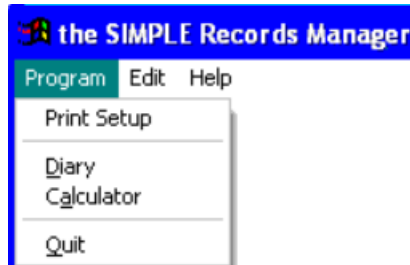
## Print User IDs



You can print two reports, ID and Restrictions or ID and Passwords. Either of these reports can be printed for all user Id's or limited to just one user ID. The report can be viewed on the screen or directed to a chosen printer.

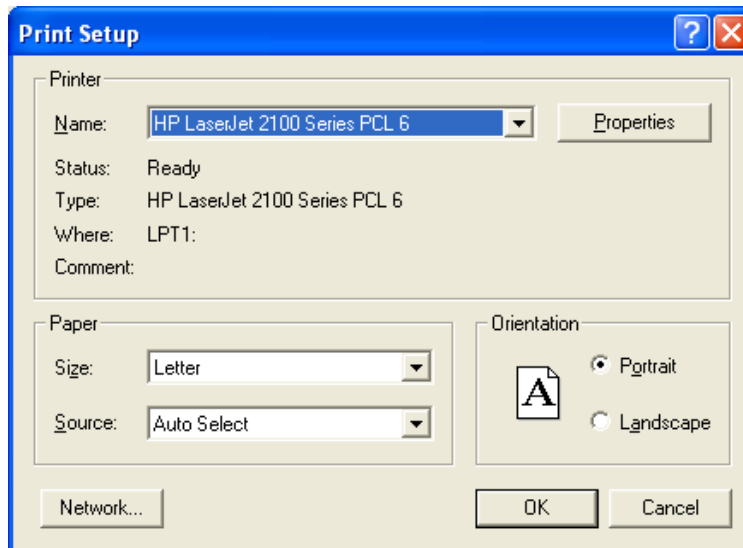
## Chapter 12 Task Bar Menus

### Program Menu



To see this menu, click **Program** on the main pull-down menu.

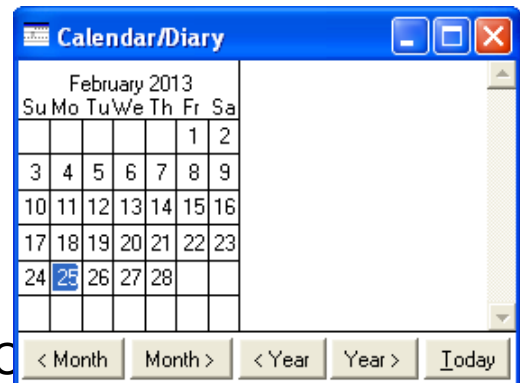
### Print Setup



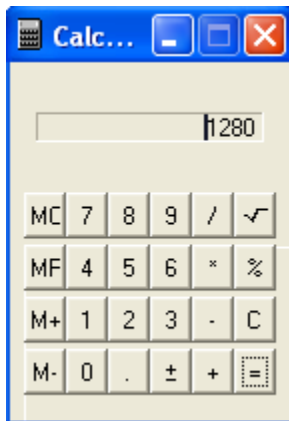
This screen reflects your current Printer setup, orientation and paper size. Click the down arrows to reveal other choices available.

### Calendar/Diary

The Calendar desk accessory can be used to lookup dates.

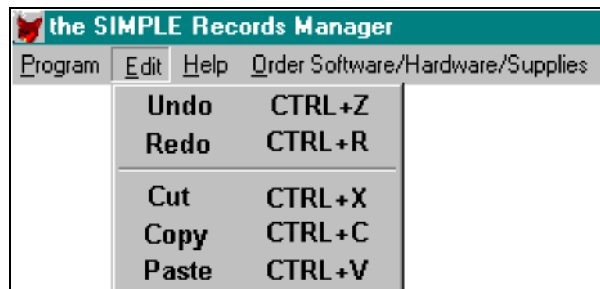


## Calculator



The Calculator can be used at almost anytime throughout the program. It functions like a regular calculator.

## Edit Menu

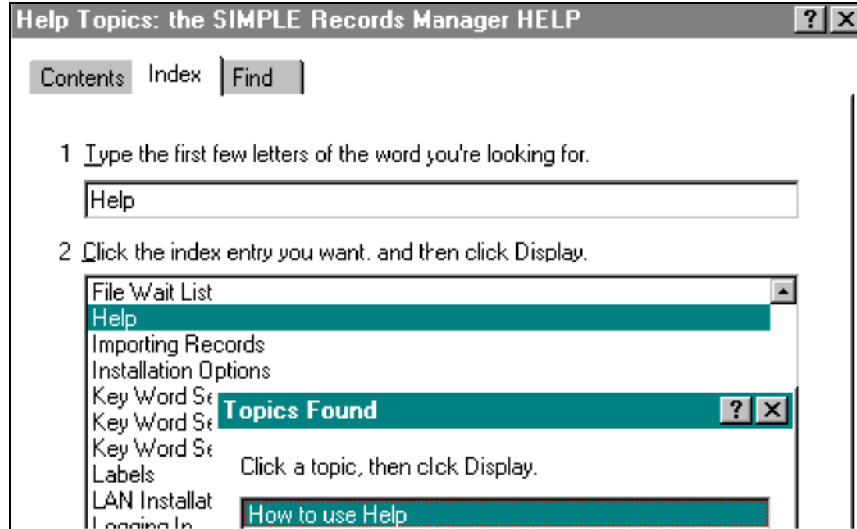


The Edit Menu allows you to Cut, Copy, and Paste throughout the program. This menu conforms to Windows functions. If you accidentally type something use the Undo feature to “Undo”.

## Help Menu

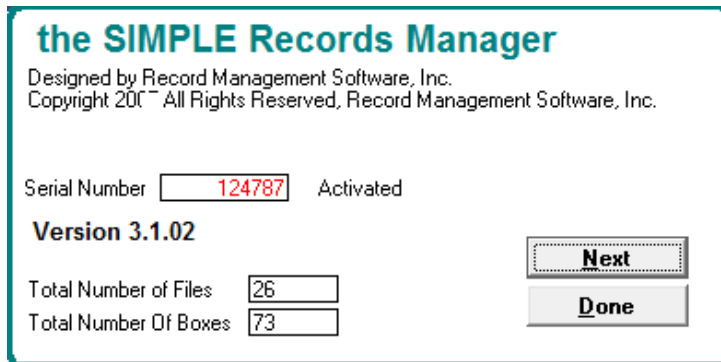


Help can be selected from the menu of by clicking **F1**. The **F1** key brings up context sensitive Help.



To learn more about using the Help program, select Help from the Index Tab of the Help Window or choose the Contents Tab, select Getting Help, On-line Help.

### About SIMPLE



1. From the **Program** pull-down menu you can access the SIMPLE Records Manager **About** feature. The first screen tells you how many Box and Files you have entered into the system.
2. Click **Next** to see the second **About** screen, or click **Done** for this screen to close.



This screen shows how you can contact Record Management Software, Inc.

3. When you are finished click **Done**.

## Chapter 13 Portable Module

The SIMPLE Records Manager already facilitates using a stationary bar code reader to check out and checking in your files and boxes. This is accomplished via the Quick OUT and IN menu item.

The Portable Add-on module adds much more. In addition it provides for building a database of all your locations. This could be shelves onto which files or boxes are being stored, drawers of a file cabinet, open filing shelves, vault storage shelves, to name a few.

SIMPLE provides for printing a bar coded label for each location.



It also comes with one voice prompting, laser, portable bar code reader which can be used to do the following:

- Put new files away — directly onto the storage shelf.
- Put new boxes away — directly onto the storage shelf.
- Check files and boxes out.
- Check files and boxes back in.
- Mass move files and boxes to new locations;
- Move files from a storage shelf directly into a box for long term storage.

Use of the optional portable bar code reader with the Simple Records Manager is simple and practical, and provides tremendous savings as compared to collecting data manually.

You can preprint box labels and give them to each department instructing them to be sure they put a bar coded box label onto each box prior to calling for a pickup.

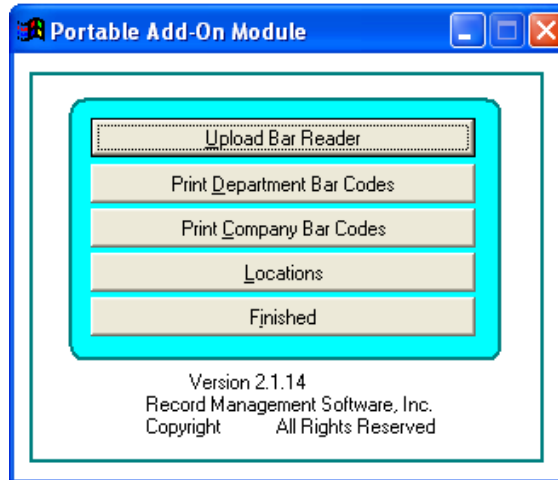
Some law firms create a bar coded label and put it onto the side of each office door. Then once or more a week someone goes from office to office by scanning the label on the door **and each and every file they find in that office**. Then they upload the portable bar code reader which automatically updates each files location to reflect the office it was found in.

Likewise, some insurance companies put a bar coded label onto the side of each desk in their claims and underwriting departments and daily go from desk to desk scanning every file. Then they upload the portable bar code reader which automatically updates each files location to reflect which claims adjuster or underwriter that has the file.

All in all, this can be a most valuable add on to the SIMPLE Records Manager.

*This is an Optional Purchase.* Contact RMS at 914.725.5900 for current prices on software and equipment, and label options.

## Main Menu

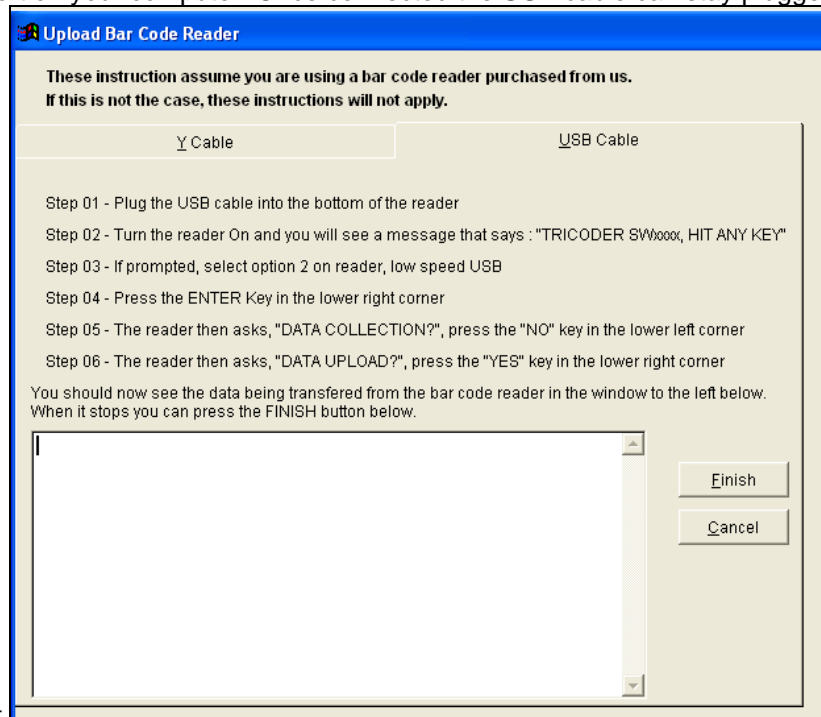


From the Main Menu click **Portable**. This then presents the Portable Add-On menu.

### Up Load Bar Reader

These instructions describe the proper method for uploading the Portable Bar Code Reader supplied by RMS. If you are using a portable code reader of your own choosing, these instructions will not apply.

Our Portable bar code reader connects via the USB cable provided. The cable may be connected to any available USB port on your computer. Once connected the USB cable can stay plugged in



— no need to remove it.



Once the portable bar code reader is connected to the USB cable you are ready to upload the scanned information following the directions on the screen.

### UPLOADING PORTABLE BAR CODE READER

02/25/2013 14:10:27

Page Number 1

	Company	Department	File Number	Box Number	Person	Location	Date In	Date Out	Action
Success	RMS			9047		4-A-004	///	///	ADD BOX
Success	RMS			9042		4-A-004	///	///	ADD BOX
Success	RMS			9048		4-A-003	///	///	ADD BOX
Success				9125	MIKE GREENE		02/25/2013	///	CHECK OUT
Success				9009	MIKE GREENE		02/25/2013	///	CHECK OUT
Success				9003			02/25/2013	///	CHECK IN BOX
Error				* 9021			///	///	CHECK IN BOX
Success				7802		4-A-008	///	///	MOVE BOX

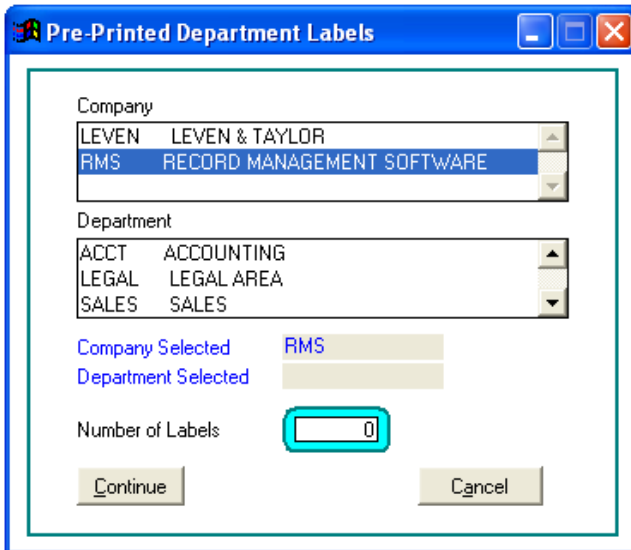
The uploaded information appears in a report that you may preview and print. Review the printed output to be satisfied all of the scanned information has been up-loaded. There may be some errors that need attending to and these will be explained as we continue on with instructions.

If you are comfortable everything has been uploaded, you need to erase the information in the bar code reader. You do as follows:

1. "Erase the File?" Click **Yes** located in the lower right of the bar code reader.
2. Disconnect the bar code reader.

### Print Department Bar Codes

1. From the Portable Add On Module menu click **Print Department Bar Codes**.



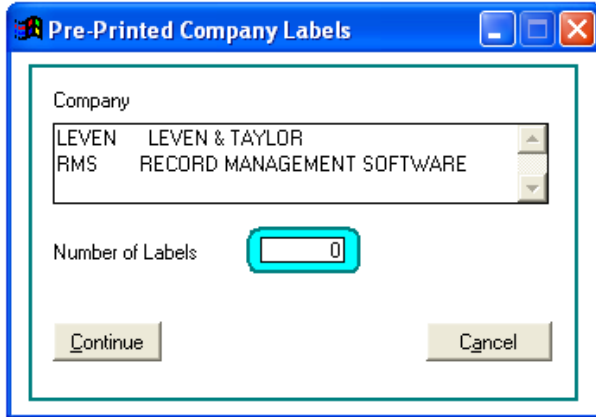
This feature provides for "preprinting" box labels that can be given to each department with instructions that they put one of these labels onto each box prior to calling for the boxes to be picked up. If they do so, you can then use the portable bar code reader to put the boxes away.

As all departments are connected to their respective company you must first select the COMPANY from the list of companies provided. In most cases, you will be managing records for your company only. However, the system has been created to give you the ability to manage records for as many companies as may be needed. Also, you may have changed the field names and what we refer to as "Company" you may have named something else.

2. Next, you need to choose which department you want to print bar coded labels for. Again, you make that selection from the list of departments provided.
3. And finally, you need to indicate how many labels you want to print.
4. Click **Continue**. You can then direct the output to the printer or preview the labels on the screen.

### Print Company Bar Codes

From the portable bar code reader software main menu select **Print Company Bar Codes**.



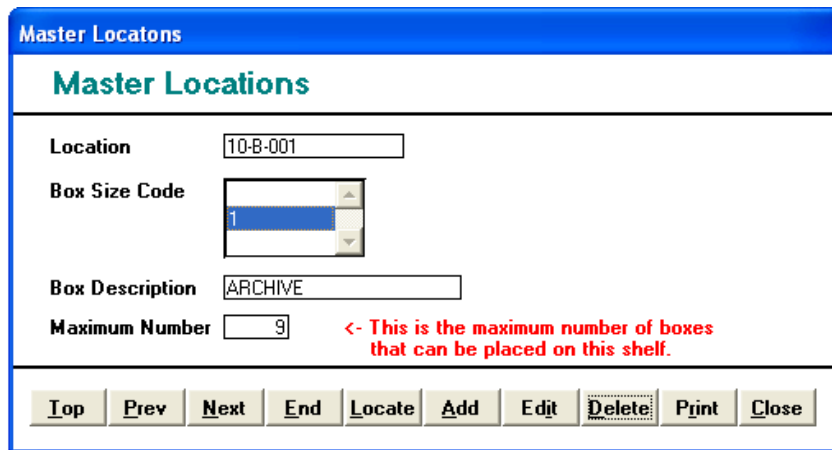
This feature provides for preprinting box labels that can be given to each department with instructions that they put one of these labels onto each box prior to calling for the boxes to be picked up. If they do so, you can then use the portable bar code reader to put the boxes away.

This feature differs from printing department bar codes in that the department number is not included.

1. Choose which company you now would like to print bar coded labels for. Again, you make that selection from the list of companies provided.
2. Indicate how many labels you want to print.
3. Click **Continue**. You can then direct the output to the printer or preview the labels on the screen.

### Locations

The following screen is used to **Add**, **Edit**, and **Delete** your various Locations. As each location is entered you are asked to indicate the box size code.



Later you can print a bar coded label for each location.

### Field Explanations

**Location:** This is a 15 position alpha/numeric field and is required. It is used for entering the location you wish to establish.

**Box Size Code:** Using the Down Arrow, select the box size code for this shelf

**Description:** Enter the box size code's description.

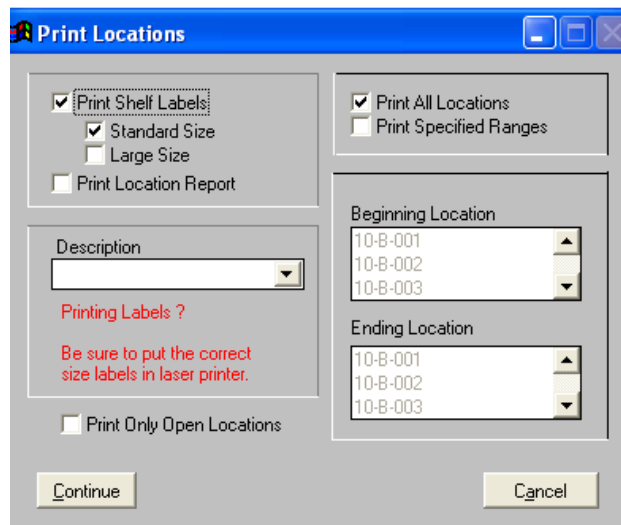
**Maximum Number:** Enter the maximum number of spaces on that shelf.

**Note:** You can put different size boxes (onto box storage shelves) and there is no limit as to the number of boxes that can be put onto any one shelf. This gives you great flexibility as to how you utilize your storage spaces.

### Understanding the Buttons



Printing bar coded labels and printing a Master List of your existing Locations is accomplished by clicking Print on the Location screen. Having done so, the next screen is presented.



### Print Shelf Labels

1. Click the check box in front of Print Shelf Labels and choose which size you desire. You are offered two sizes, Standard and Large size.

Standard Shelf Labels are 3 7/16" x 2/3" (332256) 3 across/10 down

Large Shelf Labels are 4" x 3 1/3" (331705) 2 across/3 down

2. Choose the desired type of labels to print by using the pull down menu associated with the description window. Choosing an item from the description pull down window limits the labels printed to just those matching this description.
3. You can also choose to print **All Locations** or a specified range. If you choose **Print Specified Ranges** the beginning and ending location (for the description selected) are shown and you can move up and down and finally click on the locations to be printed at this time.
4. When you have completed all of the above click **Continue**.

### Print Location Report

LOCATION						02/25/2013
Location	Shelf Name	Size	Max	Filled	Opened	
10-B-001	ARCHIVE	1		9	9	0
10-B-002	ARCHIVE	1		12	2	10
10-B-003	ARCHIVE	1		2	2	0
10-B-004	ARCHIVE	1		12	7	5
10-B-005	ARCHIVE	1		12	12	0
10-B-006	ARCHIVE	1		12	4	8
10-B-007	ARCHIVE	1		12	6	6

This has all the same options as described above but will print a report showing the specified locations rather than bar coded labels. As such, follow the steps as described under Print Shelf Labels.

### Order Labels

You can order labels from Record Management Software. For pricing and to place an order, contact us at [support@recordmanagementsoftware.com](mailto:support@recordmanagementsoftware.com) or 914.725.5900

Stock Number	Type Label	Dimensions	Labels per Sheet	Sheets per Box	Total Labels
331907	Box	4 1/4" X 5 1/2"	4	250	1000
331705	Box - preprint	4" X 3 1/3	6	250	1500
332458	Shelf - Standard	3 7/16" X 2/3"	30	250	7500
331705	Shelf - Large	4" X 3 1/3	6	250	1500
332458	Folder- Standard	3 7/16" X 2/3"	30	250	7500
331806	Folder - Expanded	4 1/4" X 2"	10	250	2500
331503	Folder- Supplemental	4" X 1"	20	250	5000

## Portable Bar Code Reader Instructions

### Overview



For technical instructions about your Portable Bar Code Reader (*above*), consult the associated user manual. It discusses changing batteries, installing the hand strap, using the rubber case provided, technical specifications, and other mechanical information.

Instructions on uploading scanned data can be found above – *Portable Upload*.

The reader is programmed to process

- *new boxes coming in*
- *boxes returning*
- *folders being returned to their original box*
- *moving folders from one box to another*
- *packing folders into a box*

The scanning for these functions can be commingled. That is, you can scan *new boxes coming in*, and then *boxes returning*, and then go back and scan some more *new boxes coming in*. You do not need to upload the reader after each process; the reader keeps the data safely organized. When it is uploaded, the Simple Records Manager processes everything that was scanned and stores the data, maintaining the organization.

## General Operation

### Turning the Reader On

#### LT 5000

1. Turn the reader on using the **On/Off** key located in the upper left corner of the keypad.

2. When the unit powers up, it displays **TRICODER KT 5000** – with a menu.
3. Press 1 **Data collection**.
4. It next displays **Program No.? Key [0-3]?** Enter 1 for program 1.



- **NOTE:** You will always use Program 1 unless directed otherwise by technical support.

#### LT 54

1. Turn the reader on using the **On/Off** key located in the upper left corner of the keypad.
2. When the unit powers up, it displays **DMA TRICODER W1014 E – HIT ANY KEY**. The exact message may differ from unit to unit, but the point is to **hit any key** to continue.
3. It next displays **Program No.? Key [0-3]?** Enter 1 for program 1.



**NOTE:** You will always use Program 1 unless directed otherwise by technical support.

4. After pressing 1, the unit displays **Data collection? Key [Yes/No]?**
5. Click **Enter/Yes** key located to the lower right of the keypad to enter the data collection mode.

### Selecting the Program

If there is data in the scanner from a previous session, you will automatically be returned to the prompt you were at. For example: if you turn the reader off while scanning *boxes returning* (or it turns itself off after 5 minutes idle), when you turn the unit on again you will be prompted for **Location**, or whatever field you were in. You can then either continue scanning *boxes returning* or press the **End** key located on the right side of the keypad to hear the menu choices. If the reader is not storing data (meaning previous data was uploaded) you will then be asked, **Program No.? Key [0-3]?**

### Reader Menu Items

Program 1 provides for functions regarding boxes and files.

#### Box Menu

- New Boxes
- Check Out Boxes
- Check In Boxes
- Move Boxes

## File Menu

- New Files
  - Move Files
  - Box Files
  - Check In Files
  - Check Out Files
1. When you are in any of these functions and wish to return to the Menu, click **End** on the right side of the keypad.
  2. If you want to leave the menus and turn the reader off, answer **NO** to each of the Menu items until you hear, "**Finished?**", then enter **Yes**.
  3. Or you can press the **F1** function key on the top row of the keypad, which will return you to the **Data collection? Key [Yes/No]?** display.
  4. You can then just turn the reader off.

## Voice Prompting

The reader is programmed for audio. As each prompt appears in the window of the reader you will hear what you are supposed to scan. If you want to turn the voice portion OFF, proceed as follows:

1. Press **SHIFT** key and Release.
2. Press **F1** key and Release.
3. Press **S** key and Release.

If you want to turn the voice portion ON do the following:

4. Press **SHIFT** key and Release.
5. Press **F1** key and Release.
6. Press **V** key and Release.

## Scanning a bar code

To scan a bar code, point the reader at the label and squeeze the trigger or press the green bar just above the keypad (older models).

For most users, resting your thumb on the bar and pressing as needed seems to be the most comfortable way of using of the reader. When the green bar is pressed, the laser beam will project from the top of the reader.



DANGER! **NEVER** look into the beam!

---

It may take some practice to hold the reader in the right position so that the beam hits the bar code correctly. The reader is designed so that you can look at the reader's window while scanning a bar code. This way, you can see in the window what was just scanned. You will consequently be holding the reader tilted slightly upward rather than pointing exactly at the bar code. Just be sure the laser beam extends clear across the bar code and overlaps on both sides.

## Box Menu

### New Boxes

When you hear, “**New boxes?**” and answer **Yes** by clicking **Enter**. The reader displays **Location**, and you will hear the word, “**Location**” spoken.

### Overview of New Box Entry Procedure

1. After locating a shelf onto which new boxes can be put, turn on the reader, choose Program # 1.
2. Go to **Data collection**.
3. If you already have data in the scanner, you will automatically be returned to the previous prompt, as described above.
4. If there is **no** data in the scanner you will be prompted to select a function, i.e., **New boxes?**, **Boxes returning?**, **Files returning?**, **Finished?**. Choose **New boxes** by pressing the green **ENTER/YES** key.
  - **Location:** The reader first prompts you for the Location. Scan the bar code on the shelf onto which your first box is to be placed.
  - **Client Number:** The reader then prompts you for the Client Number. Scan the client bar code on the label.
  - **Assigned Box:** The reader then prompts you for the Assigned Box Number. Scan the Assigned Box Number bar code on the label.
  - **Department:** The reader next prompts you for the Department Number. Scan the Department Number bar code on the label. This field may often be empty, as not all clients will want to track their boxes by department. If empty, you can either scan the bar code or click **Enter**.

When finished scanning the Department bar code, the reader automatically returns to the **Location** prompt.

5. If you are putting more than one box onto the same shelf you can either scan the shelf label again, or click **Enter** and the reader will recall the last shelf scanned. So, if you are storing 30 boxes for the same department, you need to scan the department bar code only once. But always remember to scan a **new** department bar code when you switch to another department. NOTE: This feature works similarly in all the fields.
6. When finished scanning all new boxes, click **End** and you will head the next menu prompt, “**Boxes returning?**”
7. You can *scan new boxes* and stop – and then, without uploading, you can scan *boxes returning*, or *Files returning*.
8. When you are finished scanning, you can upload the reader at your convenience.



When you are finished stowing the new boxes and ready to go to the Menu, click **End**.

### Boxes Checkout

When you hear “**Check out box?**” and answer **Yes** by clicking **Enter**, you receive a visible and audible “**Box**” prompt.

#### Assigned Box Number

At the box prompt, the Assigned Box Number is scanned from the box label. When you are finished checking out boxes and ready to go to the Menu, click **End**.

#### Person

This prompts you to scan or type in the name of the person to whom the box is being checked out.

### Boxes Returning

When you hear, “**Check in box?**” and answer **Yes** by clicking **Enter**, you again receive a visible and audible “**Box**” prompt.

#### Assigned Box

At Boxes Returning **Box** prompt, the assigned box number is scanned from the box label, as above. When you are finished returning boxes and ready to go to the Menu, click **End**.

#### Location

At this prompt, Archive Manager expects you to scan the bar code label on the shelf onto which you will be placing the first of the returned boxes.

### Move Boxes

The **Move Boxes** prompt allows you to scan boxes that are already in the database to new locations, and generates the necessary audit trail.

When you hear, “**Move box?**” and answer **Yes**, you receive a visible and audible “**Box**” prompt.

The **Assigned Box** and **Location** prompts function similarly to those prompts in Boxes Returning.

## File Menu

### New Files

This function is used when putting new files into boxes. The prompts are:

- File #
- Box #
- Client
- Dept

## Move Files

This function is used when putting moving existing files into different boxes. The prompts are:

- File location
- File #

## Files Returning

This function is used when files are returned to their boxes. When the bar code reader is uploaded and the scanned information processed, you receive a report. If you have accidentally put a folder into the wrong box, the report shows this as an error. In this event, the error should be corrected immediately.

When you hear, “**Check In Files?**” and answer **Yes**, you next see the first prompt.

The first three scans are taken from the folder label on the folder.

1. The first item scanned is the client number from the folder label.
2. Then the box number on the folder label is scanned.
3. Then the folder number on the folder label is scanned.

The prompts are:

- File location
- File #

When you are finished stowing the files and ready to go to the Menu, click **End**.

## Check Out Files

This function is used when retrieving files from boxes.

### File #

At the **File** prompt, the file number is scanned from the folder label.

### Person

This prompts you to scan or type in the name of the person to whom the box is being checked out.

## Appendix A Technical Support

Many of the issues can be easily resolved by re-indexing your files. From the main menu choose **Other Utilities**. Next click **Reindex All Files**. If a problem persists and you have re-indexed your files with no success, write down the error number, error message, and exactly what steps you took to get the error message.

The best way to contact Record Management Software is to make a screen shot of the error and email it to us at: [support@recordmanagementsoftware.com](mailto:support@recordmanagementsoftware.com)

Or you may call us at 914.725.5900.

## Appendix B Installation

### Stand Alone

1. Follow our instructions to download **simplesetup.exe** to your hard drive.
2. Double click on **simplesetup.exe** to install. It is recommended to use the default path into the Program directory.

### LAN - Network

#### Step 1 - Server

1. Using our instructions and passwords download SimpleLANserver.exe from our website. Double click on **SimpleLANserver.exe** to install.
2. During the installation you are asked where to load the system. It is recommended that you use universal naming conventions wherever possible, i.e., J:\APPS\SIMPLE32.
3. When the install process finishes and the system is automatically launched you are asked "Where did you just install the software?" Click on **Network Server**.
4. You are asked to reenter where the software was installed. Enter the same thing you entered during the install process itself. (It is recommended that you use universal naming conventions wherever possible, i.e., \\ServerName/ Apps/Simple32. You can, however use the drive letter and folder name, i.e., J:\APPS\SIMPLE32).

#### Step 2 – Each Station

1. For the stations download **SimpleLANClient.exe** using our instructions and passwords from our website.
2. Double click on **SimpleLANClient** at each station to install. Use the default path into the Program directory.
3. There will be a new icon on your desktop for the Simple Records Manager. The first time you launch the Simple Records Manager, you will be asked for the path to the server.

