

# metr@file

*Metrofilerweb*

## USER MANUAL



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# 1 Introduction

## 1.1 Overview

MetroFiler Web was developed to offer MetroFiler clients the opportunity to track and request documents on-line.

MetroFiler Web can be customized by adding your company logo, color scheme and default page to be displayed.

MetroFiler User ID and password is used to access the site, windows authentication also supported.

Processing of retrieval requests either at File or Item level is made easy by utilizing the various search engines to navigate through the required information to find the specific document required.

A number of different delivery options are made available depending on the requirements.

A user is informed via email of the progress of retrieval until the document is delivered. All information viewed is real time thus giving the user accurate and dependable information at all times.

Metrofiler e-Records is a fresh approach to searching and managing electronic records. The custom designed viewing pane allows each user to define the manner in which the e-Records are to be displayed, providing a greater user experience.

Metrofiler e-Records caters for electronic records during their active, semi-active and archived periods in accordance with the legislative retention requirements. Electronic Records may be linked to physical records when used in conjunction with the Metrofiler Document Manager. This enables organizations to manage all business records from a single repository across all departments throughout the business.



## 1.2 Benefits e-Records

### **Contributes to improved customer service and operational efficiency**

Helps customer service representatives resolve customer enquiries more quickly, giving them online access to the same documents that customers may be referencing.

### **Simplifies the delivery of client information**

Makes great sense of organizations to easily consolidate documents and imaged documents from multiple business departments and distribute them in multiple formats both internally and externally.

### **Provides a common fixed content environment**

For indexing and managing a wide range of fixed or variable content management document types.  
Preserving organizational knowledge in one common application.

### **Reduces risk**

Helps in business continuity, records management and compliance, Supports rules-based capture and retention of all business record types. Makes it easier to discover and produce information required for reference, correspondence, litigation or audit purposes.  
Helps in disaster recovery and maintaining business continuity.  
Secures your documents and lets you control access to them.

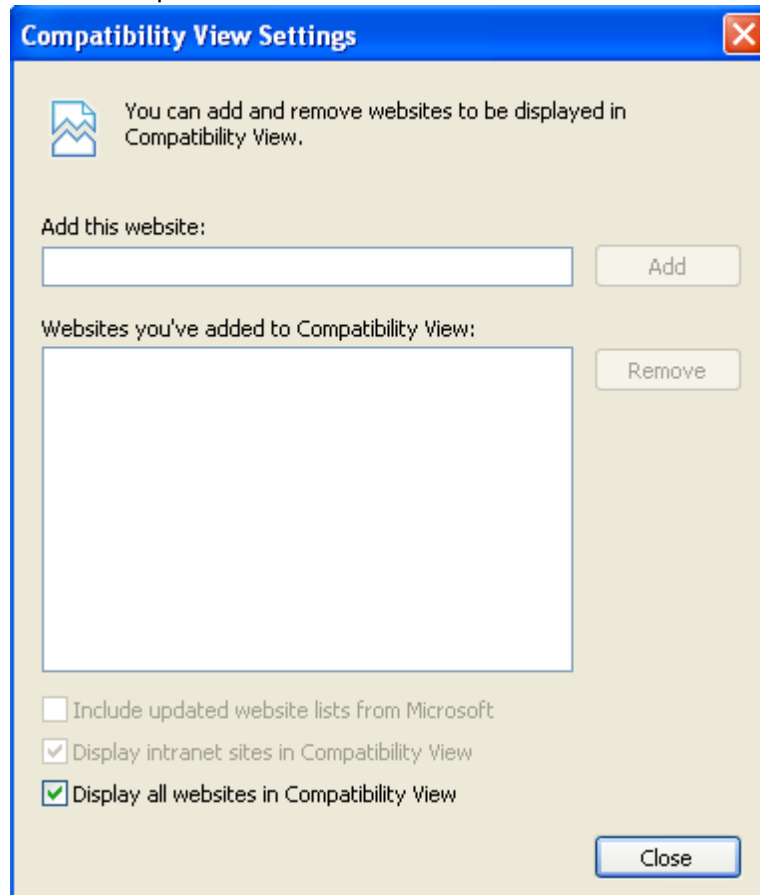
### **Saves time and money**

By reducing costs in areas such as paper processing, paper storage and distribution.  
Is significantly more affordable than enterprise content management solutions; and customization and integration requirements are minimal or easily effected.  
Saves time and money in lost filing and retrieving documents.  
Minimizing the space used for physical document storage.

## 1.3 Latest Update

### **Internet Explorer 8 - Compatibility**

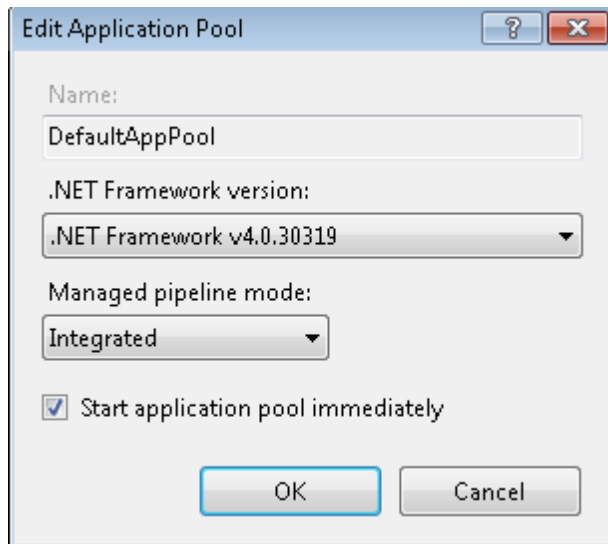
To view menu options select the following option found under Tools menu of Internet Explorer 8



### **Upgrade to Version 6.27 Prerequisite**

Install - Dot Net Framework 4.0  
en\_.net\_framework\_4\_full\_x86\_x64\_508940.exe

---



Install - Crystal Reports Version 2010 32 or 64 bit  
CRRuntime\_32bit\_13\_0.msi  
CRRuntime\_64bit\_13\_0.msi

- [-] **File Movements Now -> Search**  
New look and functions - Add a File option
- [-] **Requisition -> Requisition Basket Delivery Types**  
Normal Requisitions, Permanent Withdrawals, Destructions and Off-Site Retrievals, can be processed using the requisition module
- [-] **Document Manager -> File Proxy Acceptance**  
Files / Items with a Status of PW, DES, MET can now be tracked via the Proxy.
- [-] **Auditing Files / Items**  
Speed optimization
- [-] **eRecords**  
Search speed enhancements  
PDF Viewing compatibility change

## 2 Logon

Log on to the MetroFiler Web Intranet shortcut.

Where windows authentication user is configured system automatically logs on else, Metrofiler authentication, insert your **userid** and **password**, Click on the **Logon** button. Your security access will be confirmed by MetroFiler.

[Forgotten Your Password ?](#)

**metr@file***Metrofilerweb*

| Logon

You are here: Logon

PLEASE NOTE THAT THIS IS A NEW VERSION OF Metrofilerweb.

Please download the latest [help and manual](#).UserID: Password: [Forgotten Your Password?](#)



## 2.1 Forgotten Your Password



Metrofiler Authentication Only

Should you have forgotten your password Metrofiler Web can assist you.

Please enter your eMail Address or UserID.

☒ eMail ☐ UserID

eMail:

[Return to Logon Page](#)

Select the option eMail or UserID and insert your email address or UserID and select the 'eMail me my Password' button.

You will now receive an email with your password.

**Note** that without the userid the password cannot be used.

Please enter your eMail Address or UserID.

☒ eMail ☐ UserID

eMail:

Your Password has been eMailed.

[Return to Logon Page](#)

## 2.2 eMail Notification

Email notification will be sent to you when the delivery note is printed. If System has been configured for email notification.

You will be prompted by means of a notification when you logon, if you are in possession of these files select '**YES**' if not then '**NO**'





On selection of **YES** the [File Acceptance](#) module will be opened.

If you have selected **NO**, user can later accept the file/item(s) in the Document Manager [File Acceptance](#) module.

---

### 3 Home



[Home](#) | [Change My Details](#) | [Document Manager](#) | [eRecord Manager](#) | [Reports](#) | [Help](#) | [Log Off](#)

You are here: Home

Logged On As: PAM MC BAIN

### 3.1 Change Details

**metrofile****Metrofilerweb**

[Home](#) | [Change My Details](#) | [Document Manager](#) | [eRecord Manager](#) | [Reports](#) | [Help](#) | [Log Off](#)

You are here: Home

Logged On As: PAM MC BAIN

This option allows you to change any of your details, set out of office notification or your password (Metrofiler Authentication Only)

[Change your Password?](#)

<b>Name</b>	<input type="text"/>
<b>Surname</b>	<input type="text"/>
<b>Initials</b>	<input type="text"/>
<b>Designation</b>	<input type="text"/>
<b>Telephone</b>	<input type="text"/>
<b>Fax</b>	<input type="text"/>
<b>Cell</b>	<input type="text"/>
<b>eMail</b>	<input type="text"/>
<b>Employee No.</b>	<input type="text"/>
<b>Cost Centre</b>	<input type="text"/>
<b>Internal Dept</b>	<input type="text"/>
<b>Physical Address</b>	<input type="text"/>
<input type="checkbox"/> <b>Out of Office</b>	<input type="text"/> => <input type="text"/>
<input type="button" value="Save Changes"/>	

<b>Enter Old Password</b>	<input type="text"/>
<b>Enter New Password</b>	<input type="text"/>
<b>Confirm New Password</b>	<input type="text"/>
<input type="button" value="Change Password"/>	

## 4 Document Manager

The screenshot shows the Metrofilerweb interface. The top navigation bar includes the 'metrofile' logo on the left and the 'Metrofilerweb' logo on the right. Below the logos is a horizontal menu with the following items: Home, Change My Details, Document Manager (highlighted), eRecord Manager, Reports, Help, and Log Off. A dropdown menu is open under 'Document Manager', listing the following options: Files in my Possession, File Acceptance, Requisitions, Bulk Requisitions, Search, Processing, Filing (with a right-pointing arrow), Receiving, and Retrievals. On the left side of the main content area, there is a breadcrumb trail that reads 'You are here: Home'.

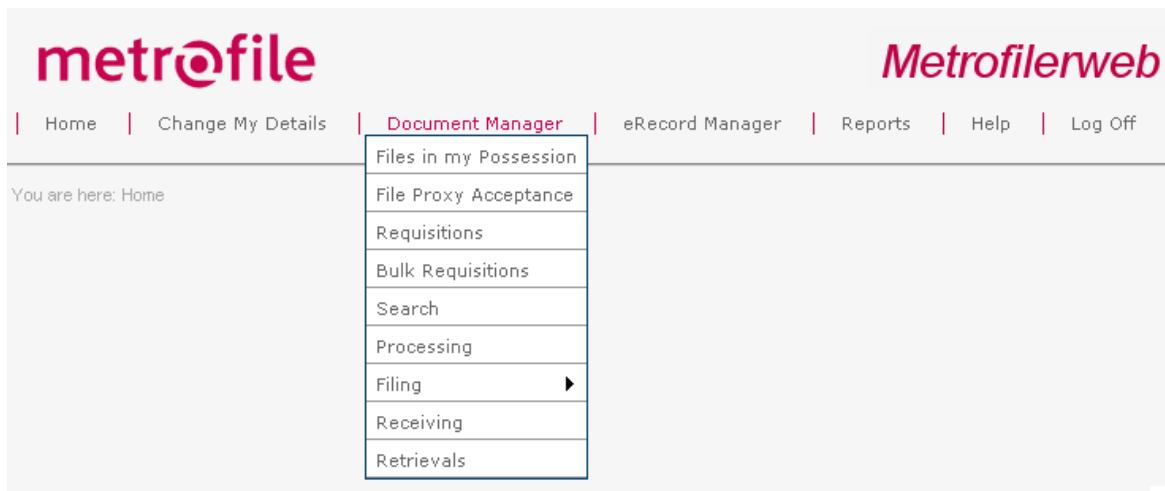
**metrofile** *Metrofilerweb*

| Home | Change My Details | **Document Manager** | eRecord Manager | Reports | Help | Log Off

You are here: Home

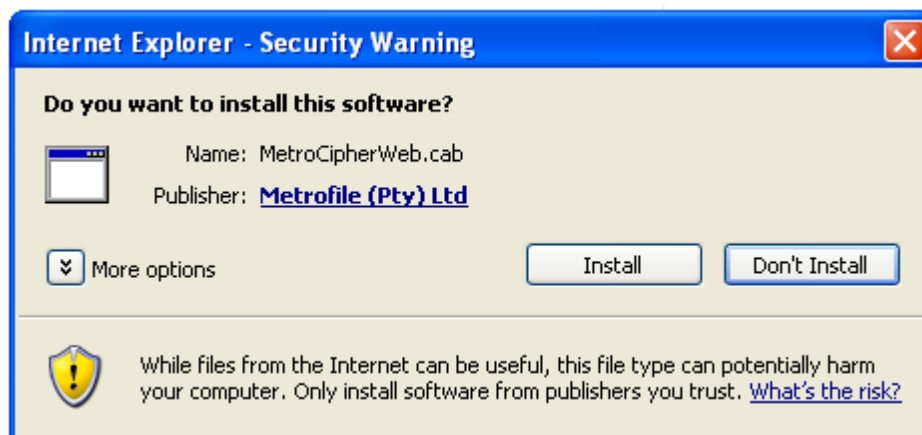
- Files in my Possession
- File Acceptance
- Requisitions
- Bulk Requisitions
- Search
- Processing
- Filing ▶
- Receiving
- Retrievals

## 4.1 File Proxy Acceptance



If the user is a [Proxy Location Administrator](#), they will see a different Acceptance Module than the [standard module](#).

For first time use the user will be presented with the following option, select install, to install the MetroCipherWeb.cab



## 4.2 Files in My Possession

First Page

Previous Page

Next Page

Last Page

Records per Page

20

Results 1 - 3 of 3.

Refresh

		Barcode	Branch	Department	Record Type	Received On	Type	Location	RequestedOn	RequestedBy	I
Forward	Details	32F	Cape Town	Personnel Department	Employee Records	14/01/2011 08:25:52 AM	File	Pamela Mc Bain			
Forward	Details	84F	Cape Town	Finance Department	Financial Records	14/01/2011 12:23:30 PM	File	Pamela Mc Bain			
Forward	Details	85F	Cape Town	Finance Department	Financial Records	14/01/2011 12:25:23 PM	File	Pamela Mc Bain			

You will be presented with the screen which will display the file/item(s) number which you have in your possession.



**It is important to check the Requested By as other Web users may have requested files in your possession be forwarded to them.**

**Forwarding is based on the permitted system option, and therefore may not be visible.**

To view the captured details of listed files/items select the **Details** button.

File number	Record Type	ID Number	Surname	Initials	Prefix	Employee No
32F	Employee Records	6009180023085	HOWES	A	CR	3455

Should you receive a request from another MetroFiler Web user requesting that you to forward a file in your possession, to forward a file/item(s) select the **Forward** button, select the users name by clicking on it and select the **Forward** button.

You are here: Document Manager >> Files in My Possession >> Forward

[Back](#)

File number	Record Type	ID Number	Surname	Initials	Prefix	Employee No
32F	Employee Records	6009180023085	HOWES	A	CR	3455

Select User to forward this File / Item to

System Administrator  
John Brown  
Penny Jones  
Tim Smith

[Forward](#)

You can view any file/item(s) which you have forwarded which have not been accepted by recipient by selecting the option [Files you forwarded](#)

You are here: Document Manager >> Files in My Possession

☐ Files in my Possession

☒ Files forwarded

[First Page](#)

[Previous Page](#)

[Next Page](#)

[Last Page](#)

Records per Page

20

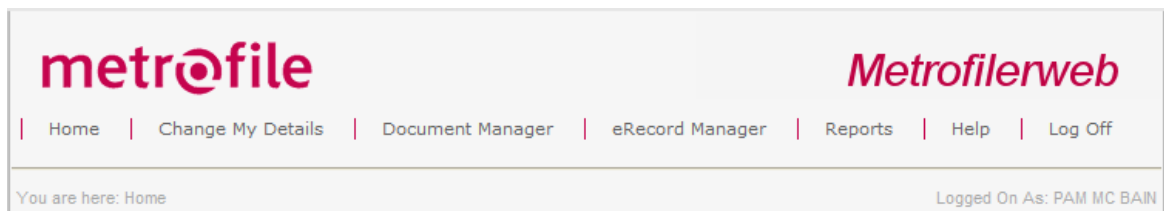
Results 1 - 1 of 1.

[Refresh](#)

	Barcode	Branch	Department	Record Type	Type	Location	Forwarded On	Forwarded To	Inits	En
<a href="#">Details</a>	32F	Cape Town	Personnel Department	Employee Records	File	In Transit	14/01/2011 14:45:04 PM	Penny Jones	P	



## 4.3 File Acceptance



When the user opens the File Acceptance Module the system will check if the user is a Proxy Location Administrator as defined in Security in Metrofiler. If the user is a [Proxy Location Administrator](#), they will see a different Acceptance Module than the [standard module](#), proxy location administrators rights to branches, department, records types are applied to Requesters at time of scanning.



**File Acceptance is based on the permitted system option, and therefore may not be visible.**

### 4.3.1 Accept Barcode

#### 4.3.1.1 Proxy Location Administrator

In this module the Proxy Administrator can either [Accept Barcodes](#) or view their [To Do List](#) or use the [Sorting](#) option to sort File/Item(s) to be delivered to the next Proxy Location or User or Requester/Workstation Id.

User will scan the Proxy Location ID/Workstation ID and then the File/Item barcode and add the entry to the batch.

Once all records are scanned into their new proxy locations the user must click the **GO** button to process the list.

The user can also use a [Cipherlab barcode scanner](#) to scan the locations and barcodes and upload the results and process.



**File/Item(s) delivered by Proxy Location Administrators do not have to be accepted by a user. Once the Proxy Administrator scans the Workplace ID of the recipient and the File/Item barcode and uploads the scanner file, the location will automatically be the Workplace ID.**

Accept Barcode To Do List Sorting

On receipt of a requested file / item, please scan the new Location and barcoded numbers below into a Batch and click GO

Upload

Config

Number of Records Transferred : 0

Current Settings:  
COM1 (38400bps)

metro@file

Scan Proxy Location

Scan Barcode

Download

Add to Batch

GO

Clear

#### 4.3.1.2 Standard File Acceptance

If a user is not a [proxy location administrator](#) the user will be presented with a normal acceptance form and a list of file/item(s) which have been requested/forwarded.

Scan or Insert the file/item barcode and clicking on **GO**

Any new file/item(s) which have been captured and flagged as '**INUSE**' can also be received in this module.



File/Item(s) delivered by Proxy Location Administrators do not have to be accepted by a user. Once the Proxy Administrator scans the workplace ID of the recipient and the File/Item barcode and uploads the scanner file, the location will automatically be the Workplace ID.

On receipt of a requested file / item, please scan or Type the barcoded number below and click GO

Barcode:  **Go**

First Page Previous Page Next Page Last Page Records per Page 20 Results 1 - 1 of 1. Refresh

Barcode	Branch	Department	Record Type	Forwarded By	Forwarded On	Type	Location	Requested By	Requested On	Initia
32F	Cape Town	Personnel Department	Employee Records	Pamela Mc Bain	14/01/2011 14:45:04 PM	File	In Transit	Penny Jones	14/01/2011 14:45:04 PM	P

### 4.3.2 To Do List

All file/item(s) currently in users manned Proxy Location and what the next location will be are displayed.

User must be an operator assigned to a Proxy Location to utilize this option.

You are here: Document Manager >> Files Proxy Acceptance

Accept Barcode To Do List Sorting

First Page Previous Page Next Page Last Page Records per Page 20 Results 1 - 3 of 3. Refresh

Barcode	Branch	Department	Record Type	Received By	Received On	Type	Location	RequestedBy	Requested On	Initia	Employee
10F	CCA	BUSINESS	PERSONNAL	RUNNER PERS	09/03/2011 10:03:50 AM	File	PERSONEL TROLLEY	MANAGER FINANCIAL	09/03/2011 10:02:03 AM		
50F	CCA	BUSINESS	PERSONNAL	RUNNER PERS	09/03/2011 10:03:56 AM	File	PERSONEL TROLLEY	MANAGER FINANCIAL	09/03/2011 10:02:11 AM		
30F	CCA	BUSINESS	PERSONNAL	RUNNER PERS	09/03/2011 10:03:53 AM	File	PERSONEL TROLLEY	MANAGER FINANCIAL	09/03/2011 10:02:16 AM		

### 4.3.3 Sorting

This option allows file/item(s) currently in users manned Proxy Location to be scanned to establish the next destination.

User must be an operator assigned to a Proxy Location to utilize this option.

Scan the file/item number select **GO**

You are here: Document Manager >> Files Proxy Acceptance Logged On As: RUNNER PERS

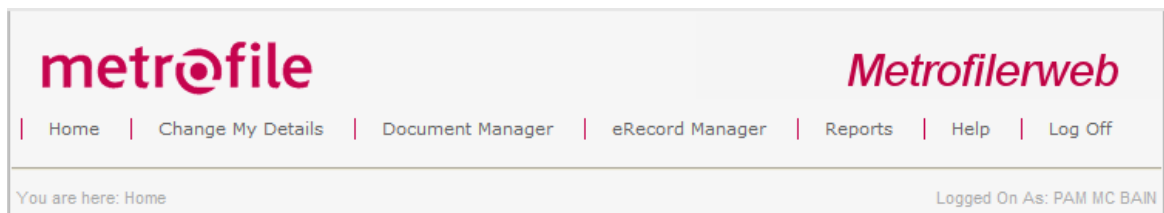
Accept Barcode To Do List **Sorting**

Scan the barcoded number below to show new Destination.


Scan Barcode  **GO**

Barcode	Branch	Department	Record Type	Received By	Received On	Type	Location	RequestedBy	Requested On	Units	EmployeeNo	CostCentre	InternalDept	Telephone	Cell	Delivery Address
S0F	CCA	BUSINESS	PERSONAL	RUNNER PERS	09/03/2011 10:03:56 AM	File	PERSONEL TROLLEY	MANAGER FINANCIAL	09/03/2011 10:02:11 AM							

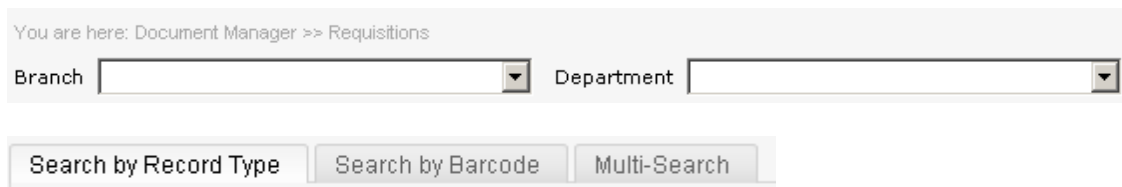
## 4.4 Requisitions



The screenshot shows the top of the Metrofile Metrofilerweb interface. On the left is the 'metrofile' logo. On the right is the 'Metrofilerweb' title. Below these is a navigation bar with links: Home, Change My Details, Document Manager, eRecord Manager, Reports, Help, and Log Off. At the bottom of the header area, a breadcrumb trail reads 'You are here: Home' and the user status 'Logged On As: PAM MC BAIN' is displayed on the right.

If the logged on user has access to multiple branches or departments, these can be accessed via the drop down options  button.

Before you choose a search option select the required branch and department.



This screenshot shows the search options section. It includes a breadcrumb trail 'You are here: Document Manager >> Requisitions'. Below this are two dropdown menus labeled 'Branch' and 'Department'. At the bottom, there are three buttons: 'Search by Record Type', 'Search by Barcode', and 'Multi-Search'.

#### 4.4.1 Search by Record Type

The screenshot shows the Metrofilerweb interface. The navigation bar includes links for Home, Change My Details, Document Manager, eRecord Manager, Reports, Help, and Log Off. The user status bar indicates 'You are here: Home' and 'Logged On As: PAM MC BAIN'.

Select a search type Files or Items using the button, followed by Record Type/Category using button the input fields will be displayed note that partial searching is available on all text fields.

To view Files/Items by Record Type, select / enter your search criteria and click GO. ☐ Partial Searching

**Search Type:**

**Record Type:**

**Record Category:**

ID Number:

Surname:

Initials:

Prefix:

Employee No:

**Go**

Insert search criteria followed by the **GO** button.

If the **GO** button is selected after the record type with no further information input, warning 'Please specify some search criteria'

The results of each column can be sorted by clicking on the column heading.

File/item(s) with a status description of Stored in Filing Area or MetrofilerWeb can be requested, to request file/item(s) by checking the sel box ☒ or checking the option **Select All** or uncheck **De-Select** to remove selected file/item(s), followed by the [Add Selected to Requisition Basket](#)

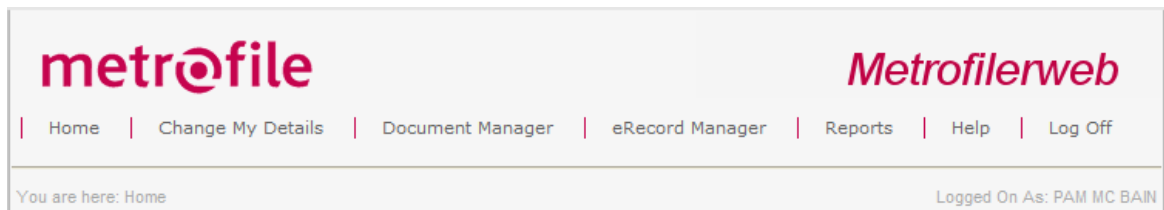
You are here: Document Manager >> Requisitions >> Results

Records per Page:  Results 1 - 2 of 2.

Back Select All De-Select All Add to Requisition Basket First Page Previous Page Next Page Last Page

FileNumber	Container	StatusDescription	IssuedTo	IssuedOn	RecordType	Record Category	IDNO	SURNAME	INITIALS	PREFIX	EMPLOYMENT NO
<input type="checkbox"/> 10F		Stored in Filing Area			PERSONNAL	GENERAL	1200047000089	HARRING	10	MR	2030113
<input type="checkbox"/> 50F		Stored in Filing Area			PERSONNAL	GENERAL	420010010009	HARRING	10	MR	2030113

#### 4.4.2 Search by Barcode



Insert the file/item barcode, and select the **GO** button.

To view a File or an Item, enter your Barcode and click GO.

**Barcode:**

File/item(s) with a status description of Stored in Filing Area or MetrofilerWeb can be requested, to request file/item(s) by checking the sel box ☒ or checking the option **Select All** or uncheck **De-Select** to remove selected file/item(s), followed by the [Add Selected to Requisition Basket](#)

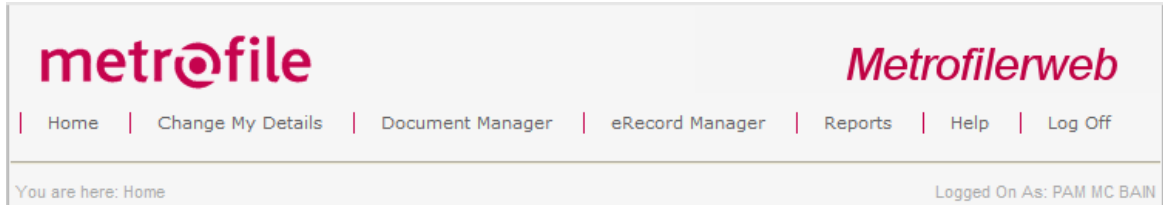
You are here: Document Manager >> Requisitions >> Results

Records per Page  Results 1 - 1 of 1.

FileNumber	Container	StatusDescription	IssuedTo	IssuedOn	RecordType	Record Category	IDNO	SURNAME	INITIALS	PREFIX	EMPLOYMENT NO
<input type="checkbox"/> 50F		Stored in Filing Area			PERSONNAL	GENERAL	0746000189	HENRIOT	LA	DD	2010000

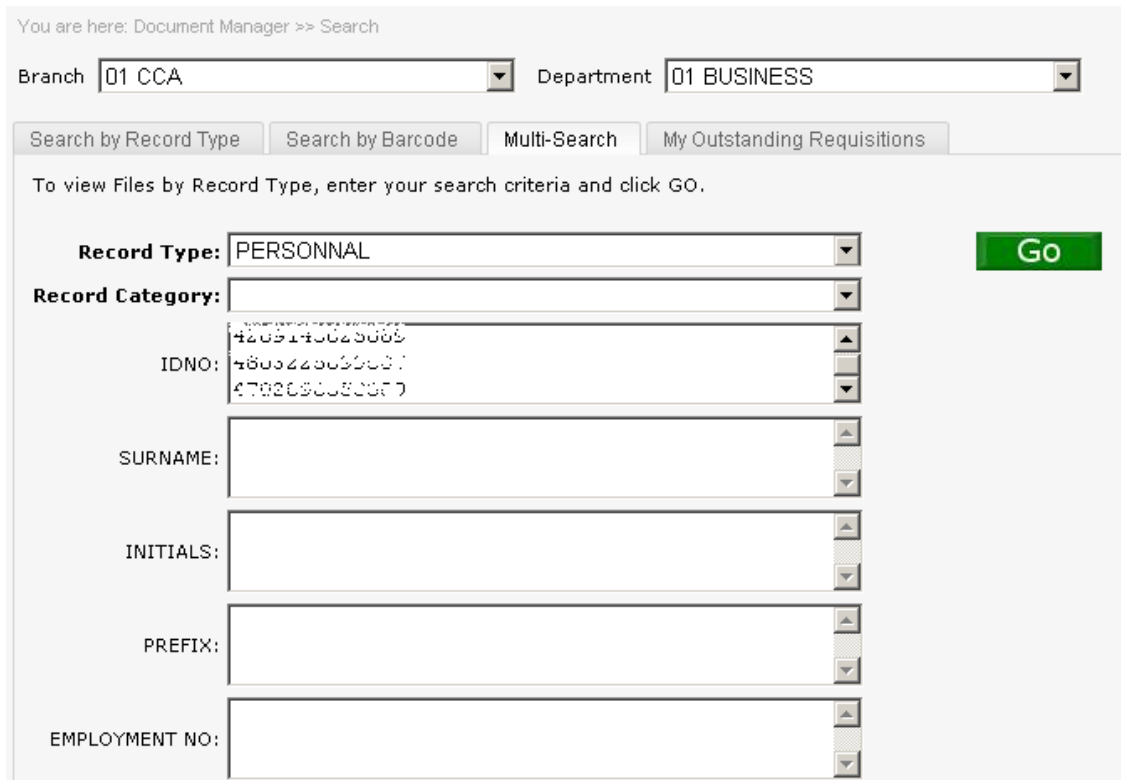


### 4.4.3 Multi Search



The image shows the Metrofilerweb login page. At the top left is the 'metrofile' logo, and at the top right is the 'Metrofilerweb' logo. Below the logos is a navigation bar with links: Home, Change My Details, Document Manager, eRecord Manager, Reports, Help, and Log Off. Below the navigation bar, it says 'You are here: Home' on the left and 'Logged On As: PAM MC BAIN' on the right.

Select a Record Type/Category using  button the input fields will be displayed.



The image shows the Multi-Search form. At the top, it says 'You are here: Document Manager >> Search'. Below this are two dropdown menus: 'Branch' with '01 CCA' selected and 'Department' with '01 BUSINESS' selected. Below these are four tabs: 'Search by Record Type', 'Search by Barcode', 'Multi-Search' (which is active), and 'My Outstanding Requisitions'. Below the tabs, it says 'To view Files by Record Type, enter your search criteria and click GO.' Below this are several input fields: 'Record Type:' with 'PERSONNAL' selected, 'Record Category:', 'IDNO:' with three values listed (420514002000, 480522003000, 470009008000), 'SURNAME:', 'INITIALS:', 'PREFIX:', and 'EMPLOYMENT NO:'. To the right of these fields is a green 'Go' button.

Insert the information into the Field Contents, list items one underneath each other multiple fields can be used, select **GO**, search results are then displayed which will allow you to make your selection for request.

If the **GO** button is selected after the record type with no further information input, warning 'Please specify some search criteria'

The results of each column can be sorted  by clicking on the column heading.

File/item(s) with a status description of Stored in Filing Area or Metrofileri can be requested, to request file/item(s) by checking the sel box ☒ or checking the option **Select All** or uncheck **De-Select** to remove selected file/item(s), followed by the [Add Selected to Requisition Basket](#)

You are here: Document Manager >> Requisitions >> Results

Records per Page: 20 Results 1 - 3 of 3.

Back Select All De-Select All Add to Requisition Basket First Page Previous Page Next Page Last Page

FileNumber	Container	StatusDescription	IssuedTo	IssuedOn	Record Category	IDNO	SURNAME	INITIALS	PREFIX	EMPLOYMENT NO	Status
<input type="checkbox"/> 10F		Stored in Filing Area			GENERAL	120914025009	HENNING			2004123	IN
<input type="checkbox"/> 32F	87B	Off-Site	Pam Mc Bain		GENERAL	630326099006	KEENE			2004123	MET
<input type="checkbox"/> 50F		Stored in Filing Area			GENERAL	420914025009	HENNING	LJ	CP	2004123	IN

#### 4.4.4 Requisition Basket

**metrofile** *Metrofilerweb*

Home | Change My Details | Document Manager | eRecord Manager | Reports | Help | Log Off

You are here: Home Logged On As: PAM MC BAIN

Files / Items in Warehouse indicates that these files are stored in the central filing area.

Files / Items in Circulation indicates your number in the queue, as multiple users can request the same file, but only the current recipient can forward the file. (only visible when where are items in circulation which you have requested)

You are here: Document Manager >> Requisitions

For Attention: MANAGER PERSONAL

Files / Items in Warehouse

F - 10F (120914025009 HENNING L J CP)  
F - 50F (120914025009 HENNING L J CP)

Delivery Type: MESSENGER

Address to be Delivered to: Branch  
1ST FLOOR  
SMITH STREET  
CAPE TOWN

Comments:

Requisition Files / Items Abort

Select Delivery Type from the button, only delivery types logged on user has been granted access to are displayed.

Delivery Type:

Address to be Delivered to:

Destruction  
MESSENGER  
Off-Site  
Permanent Withdrawal

Address to be Delivered to: options available are Branch, Department, User if a delivery

address has been defined, select the  button

Delivery Type:

Address to be Delivered to:

Multiple file/item(s) can be requisitioned in one session, select the requisition option from the menu, when all file/item(s) have been selected select the '[Requisition Files / Items](#)' button.

Should it be necessary to remove a selected file/item from the list select the requisition option from the menu, select the option [search by file/item barcode](#) remove the check box and then select '[Add to requisition basket](#)' to return to the requisition basket.

If you wish to cancel the requisition select the [abort](#) button.

You are here: Document Manager >> Requisitions >> Requisition Summary

Requisition Completed			
<b>For Attention:</b>	MANAGER PERSONAL		
<b>Date Requested:</b>	07/03/2011	<b>Reference Numbers:</b>	50
<b>Requisition Type:</b>	RR - Retrieval		
<b>Delivery Type:</b>	MESSENGER	<b>User:</b>	Pam Mc Bain
<b>Delivery Address:</b>	1ST FLOOR SMITH STREET CAPE TOWN		
<b>Comments:</b>			
<b>Files in Circulation:</b>			
<b>Files in Warehouse:</b>			
F - 10F (1200145025089,1200145025089,1200145025089)			
F - 50F (1200145025089,1200145025089,1200145025089)			
OK			

## 4.5 Bulk Requisition

The screenshot shows the Metrofile Metrofilerweb interface. The top navigation bar includes links for Home, Change My Details, Document Manager, eRecord Manager, Reports, Help, and Log Off. Below the navigation bar, the breadcrumb trail indicates 'You are here: Home' and the user is logged on as 'PAM MC BAIN'. The main content area shows 'You are here: Filing-Area Batch'. The form includes a 'For Attention' dropdown menu set to 'MANAGER PERSONAL'. Under 'Delivery Details', there are dropdown menus for 'Branch' (set to '01 CCA') and 'Department' (set to '01 BUSINESS'). The 'Delivery Type' is set to 'MESSENGER'. The 'Address to be Delivered to' field contains the text 'Branch', '1ST FLOOR', 'SMITH STREET', and 'CAPE TOWN'. A 'Comments' text area is also present.

If the logged on user has access to multiple branches or departments, these can be accessed via the drop down options button.

Select Delivery Type from the button, only delivery types logged on user has been granted access to are displayed.

Insert list of file numbers in batch list


Select Process batch button, results are displayed in the batch successful list or batch error list, results can be printed.

Clear the lists before processing next batch.


The screenshot shows three side-by-side list boxes: 'Batch List', 'Batch Success List', and 'Batch Error List'. Each list box is empty and has a vertical scrollbar on the right. Below each list box are buttons for 'ProcessBatch', 'Clear List', and 'Print List'. The 'ProcessBatch' button is only present under the 'Batch List' box.

## 4.6 Processing


Select the **Add a new record**  button


Select **branch**, **department** and **record type** from the  buttons next to each option. Non edit fields are grayed out, these are setup in the index definitions. Input a **filing method** e.g. monthly, alphabetically etc (not required)

Place the cursor in the **file number** insert box and use the hand held scanner or type in the barcode number, Ensure the barcode is correct as editing of barcode after posting is not permitted and field will be grayed out, when auto generate barcode is in use this option is grayed out, as the system will allocate a number on post of data.

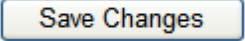
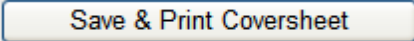
If an existing record requires change to be made input number select the  button.

The retention definition or matrix which has been defined for the record type is displayed, this can be modified based on the document by input of the required retention period in months, selecting a destruction date using the calendar button or checking the never destroy button.

Where retention period has been defined as **Date of Insert or Captured Field** (which must be a true date field) once the data has been inserted the record must be saved before the  button is used to calculate the destruction date.

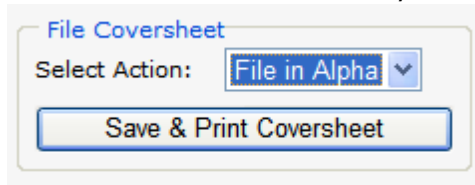
If the **never destroy** option is checked no destruction date is calculated when the  button is used.

Insert meta data, where lookups have been defined the system will auto complete the captured data where a match is made or use look up tables (Quick selection listing) use the alt + down arrow and the list will be displayed, use arrow keys to move to the required data and press enter, this data will then be input in to the field without requirement to capture.


Select the  or Select coversheet action followed by the  button.

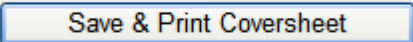
**File Details** displays the current location (grant system access - location viewing else not visible) and status of the record, this information cannot be edited.

The record information as captured can be printed if required by selecting the File CoverSheet action followed by the **Save & Print File Coversheet** button.

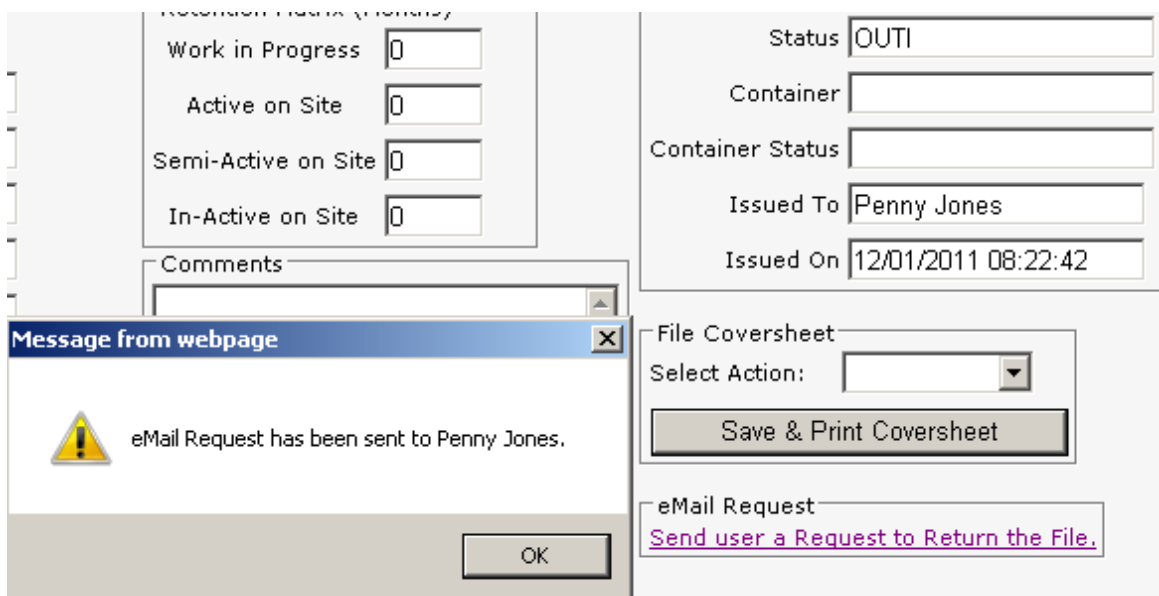


**File Coversheet**

Select Action: 



Where file is currently out of filing area user can be requested by email to return file, where user has defined email address.



The interface shows a 'File Coversheet' section with a 'Select Action' dropdown set to 'File in Alpha' and a 'Save & Print Coversheet' button. To the right, a 'File Details' section displays: Status: OUTI, Container: (empty), Container Status: (empty), Issued To: Penny Jones, Issued On: 12/01/2011 08:22:42. Below this, an 'eMail Request' section contains a link: [Send user a Request to Return the File.](#)

A 'Message from webpage' dialog box is open in the foreground, displaying a yellow warning icon and the text: 'eMail Request has been sent to Penny Jones.' with an 'OK' button.

Select the add new record  button or  button to return to search module.

Select the **'Item Capture'** tab to capture [items](#) against the file.

## 4.6.1 Items



You are here: Processing

File Capture | **Item Capture**

Itemnumbers

- 77F
- 78F, RED BRICKS
- 79F, RED ROSES

Filenumber: 77F

Itemnumber:   

Item Status:


Filing Method:

Record Type: ACCOUNTING

SHIP NAME:

DOCKET NO:


TRF NO:

SHIPDATE:  

**Save Changes**

**Filing Details**

Match Items to File ☐

Date Filed:  

**Item Coversheet**

Select Action:

**Save & Print Coversheet**

Field	Value
SHIP NAME	RED BRICKS
DOCKET NO	
TRF NO	


Select the **Add a new record**  button

Select **record type** from the  buttons next to each option.

Non edit fields are grayed out, these are setup in the index definitions.

Input a **filing method** e.g. monthly, alphabetically etc (not required)

Place the cursor in the **item number** insert box and use the hand held scanner or type in the barcode number, Ensure the barcode is correct as editing of barcode after posting is not permitted and field will be grayed out, when auto generate barcode is in use this option is grayed out, as the system will allocate a number on post of data.

If an existing record requires change to be made input number select the  button.

Check the **Match Items to File** before commencement of capture, select **date filed**, this option when used allows items to be matched to files and placed into the file and therefore no location is required or generation of picking slip.

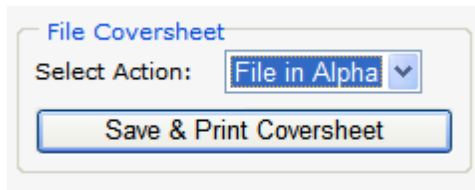
Type in all necessary details, where lookups have been defined the system will auto complete the captured data where a match is made or use look up tables (Quick selection listing) use the alt + down arrow and the list will be displayed, use arrow keys to move to the required data and press enter, this data will then be input in to the field without requirement to capture.


Select the **Save Changes** or Select coversheet action followed by the **Save & Print Coversheet** button.

The record information as captured can be printed if required by selecting the

**Save & Print Coversheet**

button, select the File CoverSheet action followed by the **Print Item Coversheet** button.

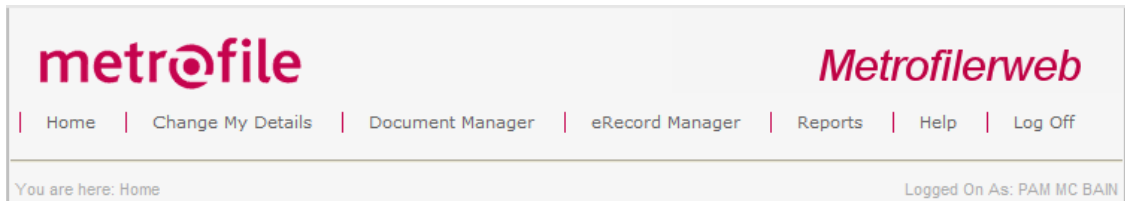
A screenshot of a web application dialog box titled "File Coversheet". Inside the dialog, there is a label "Select Action:" followed by a dropdown menu showing "File in Alpha" with a downward arrow. Below the dropdown is a button labeled "Save & Print Coversheet".

Select the **Add a new record**  button to add more items or Select the **'File Capture'** tab to capture new [file](#).


---



## 4.7 Search



The screenshot shows the Metrofilerweb interface. At the top left is the 'metrofile' logo. At the top right is the 'Metrofilerweb' logo. Below the logos is a navigation bar with links: Home, Change My Details, Document Manager, eRecord Manager, Reports, Help, and Log Off. Below the navigation bar is a breadcrumb trail: 'You are here: Home'. On the right side of the breadcrumb trail, it says 'Logged On As: PAM MC BAIN'.

If the logged on user has access to multiple branches or departments, these can be accessed via the drop down options  button.

Before you choose a search option select the required branch and department.



The screenshot shows the Metrofilerweb interface. At the top left is the 'metrofile' logo. At the top right is the 'Metrofilerweb' logo. Below the logos is a navigation bar with links: Home, Change My Details, Document Manager, eRecord Manager, Reports, Help, and Log Off. Below the navigation bar is a breadcrumb trail: 'You are here: Document Manager >> Search'. Below the breadcrumb trail are two dropdown menus: 'Branch' and 'Department'. Below the dropdown menus are four buttons: 'Search by Record Type', 'Search by Barcode', 'Multi-Search', and 'My Outstanding Requisitions'.



Drag a column header here to group by that column


ID Number

ID Number ▲

#	Filenumber	Container
>	ID Number: 1301225000008	
>	ID Number: 1302000000039	
>	ID Number: 4711000000082	
>	ID Number: 5000100100000	

Column headers can be drag to reposition them in the order of viewing i.e. Surname can be moved to appear before ID Number.


Record Category	ID	Surname	Surname


Select the  button to view detailed movements.

You are here: Document Manager >> Search >> History

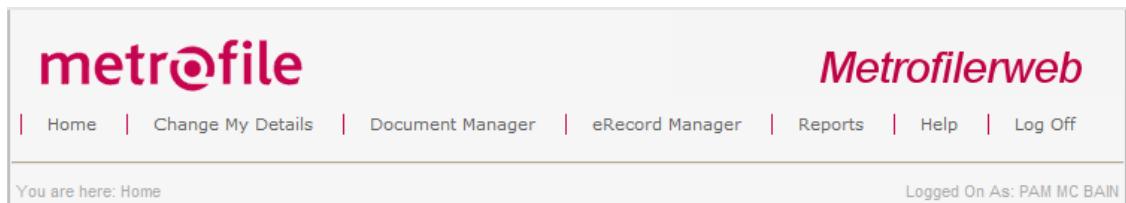
Records per Page  Results 1 - 3 of 3.

Transaction Type	Date	Filenumber	From Status	To Status	Requester	Requisition Number	Location
UKN	14/01/2011 08:25:52 AM	32F	INUSE	INUSEI	Pamela Mc Bain		Pamela Mc Bain
RIU	14/01/2011 08:25:52 AM	32F	--	INUSE	Pamela Mc Bain		In Transit
FC	14/01/2011 08:25:52 AM	32F		--			

Select the  button to edit the details, only accessible if you have permission to [processing](#).

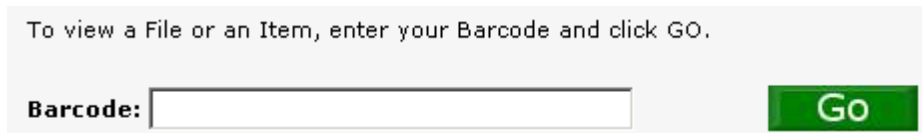
Select the  button to view/capture items, only accessible if you have permissions to [processing](#).

## 4.7.2 Search by Barcode

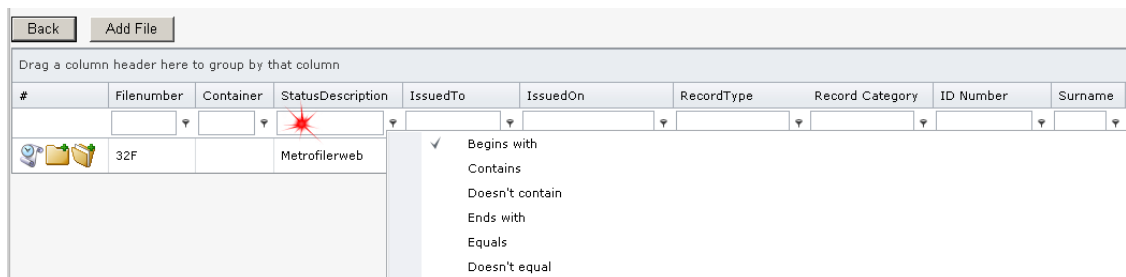


The Metrofilerweb login page features the 'metrofile' logo on the left and 'Metrofilerweb' on the right. A navigation bar contains links: Home, Change My Details, Document Manager, eRecord Manager, Reports, Help, and Log Off. Below the navigation bar, it says 'You are here: Home' and 'Logged On As: PAM MC BAIN'.

Insert the file/item barcode, and select **GO**





A search form with the instruction 'To view a File or an Item, enter your Barcode and click GO.' It includes a text input field labeled 'Barcode:' and a green 'Go' button.

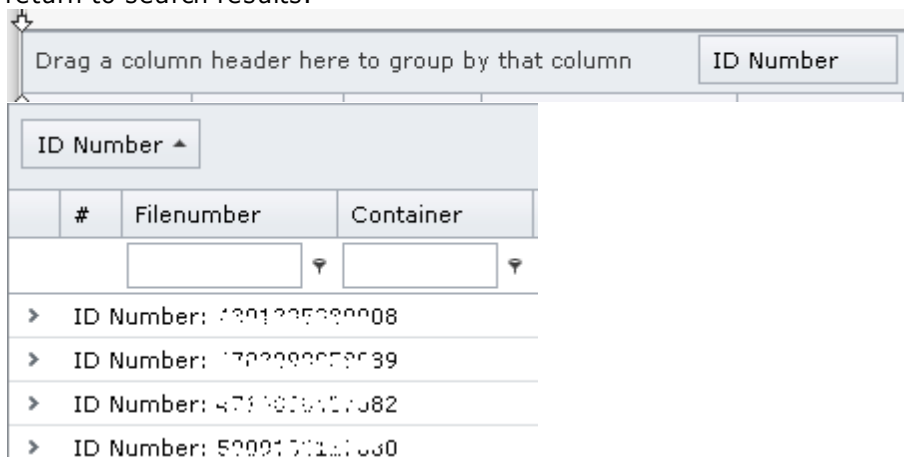


A table with columns: #, Filenumber, Container, StatusDescription, IssuedTo, IssuedOn, RecordType, Record Category, ID Number, and Surname. A filter menu is open over the 'StatusDescription' column, showing options: Begins with, Contains, Doesn't contain, Ends with, Equals, and Doesn't equal. The 'Contains' option is selected.

The results of each column can be sorted by clicking on the column heading.

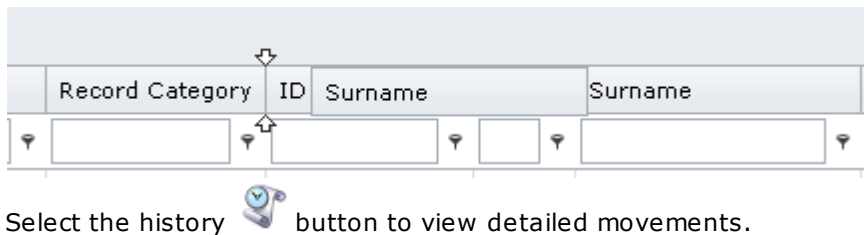
Insert \* filter parameters prior to selecting the filter  button where applicable advanced filter options will be displayed.


Column heading can be drag to allow results to be grouped, select the  button to return to search results.



A search results page showing a table with columns: #, Filenumber, and Container. The 'ID Number' column is expanded, showing a list of results with expand/collapse arrows. The results are: ID Number: 13012353300008, ID Number: 13023333300039, ID Number: 4711000010082, and ID Number: 50001001000000.

Column headers can be drag to reposition them in the order of viewing i.e. Surname can be moved to appear before ID Number.




Select the history  button to view detailed movements.


You are here: Document Manager >> Search >> History

Records per Page  Results 1 - 3 of 3.

[Back](#) [First Page](#) [Previous Page](#) [Next Page](#) [Last Page](#)

Transaction Type	Date	File number	From Status	To Status	Requester	Requisition Number	Location
UKN	14/01/2011 08:25:52 AM	32F	INUSE	INUSEI	Pamela Mc Bain		Pamela Mc Bain
RIU	14/01/2011 08:25:52 AM	32F	--	INUSE	Pamela Mc Bain		In Transit
FC	14/01/2011 08:25:52 AM	32F		--			

Select the  button to edit the details, only accessible if you have permission to [processing](#).

Select the  button to view/capture items, only accessible if you have permissions to [processing](#).

### 4.7.3 Multi Search

Select a Record Type/Category using button the input fields will be displayed.

Insert the information into the Field Contents, list items one underneath each other multiple fields can be used, select **GO**, search results are then displayed which will allow you to make your selection for request.

If the **GO** button is selected after the record type with no further information input, warning 'Please specify some search criteria'

The results of each column can be sorted by clicking on the column heading.

Insert \* filter parameters prior to selecting the filter button where applicable advanced filter options will be displayed.

Column heading can be drag to allow results to be grouped, select the button to return to search results.
















File/item(s) with a status description of Stored in Filing Area or Metrofileri can be requested, to request file/item(s) by checking the sel box or checking the option **Select All** or uncheck **De-Select** to remove selected file/item(s), followed by the [Add](#)


### [Selected to Requisition Basket'](#)


You are here: Document Manager >> Search >> Results Logged On As: Pam Mc Bain


Back Add File

Drag a column header here to group by that column



#	Filenumber	Container	StatusDescription	IssuedTo	IssuedOn	Record Category	IDNO	SURNAME	INITIALS	PREFIX	EMPLOYMENT NO	Status
  	10F		Stored in Filing Area			GENERAL	4209145110041	HEWNING	L M	CP	2005011	IN
  	12F		Stored in Filing Area			GENERAL	4602205900007	PIREY, JEFF	P J	CP	2005011	IN
  	15F		Stored in Filing Area			GENERAL	1711130058089	VAN PUGHEN	L M	CP	2005011	IN
  	1F		Stored in Filing Area				1709 10058009	VAN PUGHEN	L M	CP	2005011	IN
  	50F		Stored in Filing Area			GENERAL	4209145110041	HEWNING	L M	CP	2005011	IN

Select the history  button to view detailed movements.

Select the  button to edit the details, only accessible if you have permission to [processing](#).

Select the  button to view/capture items, only accessible if you have permissions to [processing](#).

## 4.7.4 My Outstanding Requisitions

[Home](#) | [Change My Details](#) | [Document Manager](#) | [eRecord Manager](#) | [Reports](#) | [Help](#) | [Log Off](#)

You are here: Home
Logged On As: PAM MC BAIN

Files/Items not yet accepted by the user are displayed.










To view your outstanding requisitions, click GO.


**Outstanding Requisitions**


Go

Back Add File


Drag a column header here to group by that column


#	Barcode	Record Type	Type	Location
  	3F	Employee Records	File	Filing Room 1
  	4F	Employee Records	File	Filing Room 1
  	5F	Employee Records	File	Filing Room 1

Insert \* filter parameters prior to selecting the filter  button where applicable  
advanced filter options will be displayed.

Barcode	Record Type
<input type="text"/>	
3F	<input checked="" type="checkbox"/> Begins with
4F	<input type="checkbox"/> Contains
5F	<input type="checkbox"/> Doesn't contain
	<input checked="" type="checkbox"/> Ends with
	<input type="checkbox"/> Equals
	<input type="checkbox"/> Doesn't equal

The results of each column can be sorted by clicking on the column heading.

Insert \* filter parameters prior to selecting the filter  button where applicable advanced filter options will be displayed.

Column heading can be drag to allow results to be grouped, select the  button to return to search results.

---

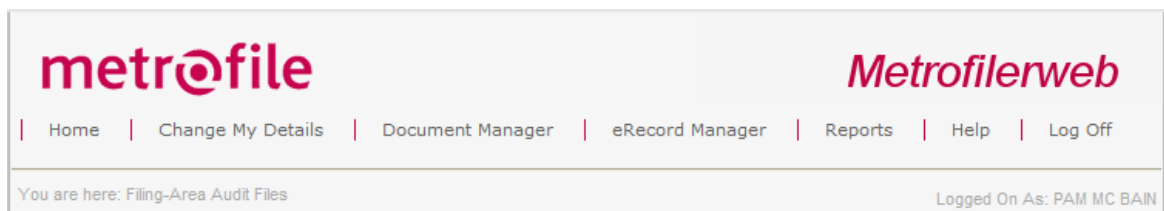


## 4.8 Filing

The screenshot displays the Metrofilerweb interface. At the top left is the 'metr@file' logo, and at the top right is the 'Metrofilerweb' logo. A navigation bar below the logos contains links: Home, Change My Details, Document Manager (highlighted), eRecord Manager, Reports, Help, and Log Off. On the left side, a breadcrumb trail reads 'You are here: Home'. A central menu is open under 'Document Manager', listing: Files in my Possession, File Acceptance, Requisitions, Bulk Requisitions, Search, Processing, Filing (highlighted in red), Receiving, and Retrievals. The 'Filing' item has a right-pointing arrow and a sub-menu to its right containing: Audit Files, Audit Items, and Put-aways.

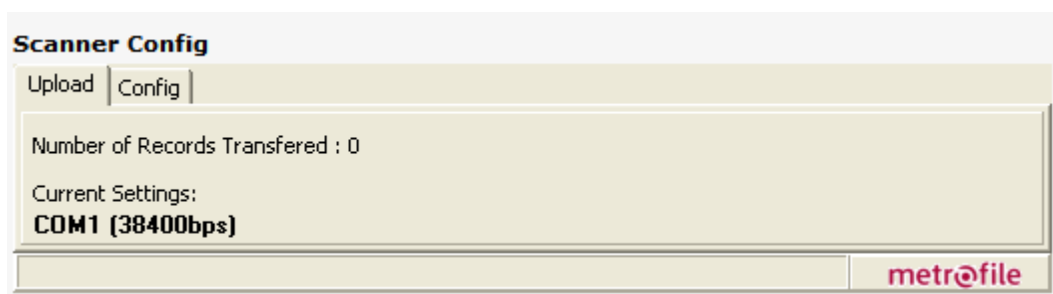
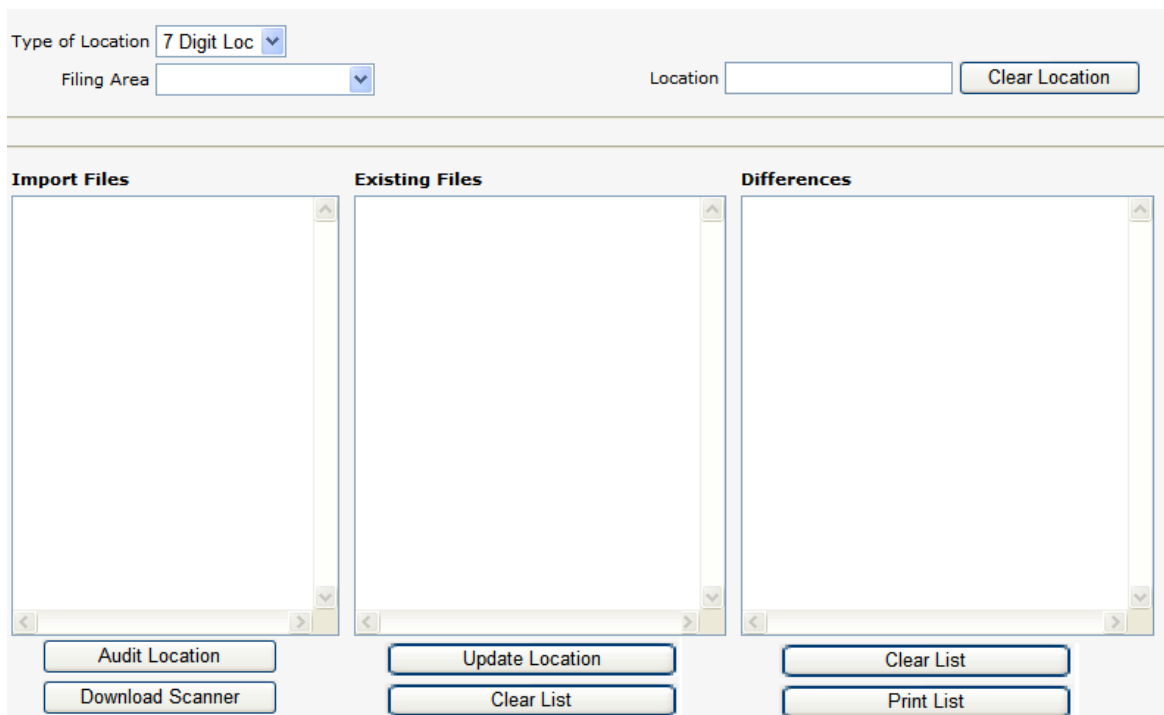
metr@file		Metrofilerweb	
	Home		Change My Details
	Document Manager		eRecord Manager
	Reports		Help
	Log Off		
You are here: Home			
Files in my Possession			
File Acceptance			
Requisitions			
Bulk Requisitions			
Search			
Processing			
Filing		▶	Audit Files
Receiving			Audit Items
Retrievals			Put-aways

### 4.8.1 Audit Files



This option is used to verify all the records within a filing area location, it is also used to move records from location to location.

There are two methods of doing this, Audit Location or Clear Location



#### **Audit Location**

Use a [Cipherlab barcode scanner](#) to scan the locations and barcodes and upload the results and process.

Select the Filing Area 

Multiple locations can be used using the launch scanner software option, as the uploaded data will contain the location.

Select the 'Download Scanner' button.

Select 'Audit Location' button, the results will be displayed in the **existing files** and **differences** pane.


Any records which are stored in the location but not in the import list will be displayed in the transaction results pane with a clear indication of the current status of the record.

Select 'Update Location' button, the results will be displayed in the **differences** pane.

The record positions are updated based on the scanner file and any record not found in the import list are updated to status of '**AUD**' and record positions are altered to zero.

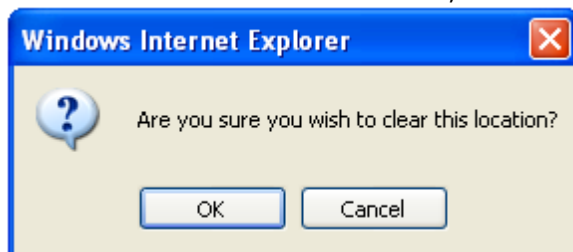
### **Clear Location**

The clear location option when select will not remove the records from the location but will update the record position to zero and change the issue status of the records to '**AUD**' (Audit)

Select the filing area 

Type or scan in location barcode number in the '**location**' bar.

Select the 'Clear Location' button, user will be warned before process is started.



Once a location has been cleared the steps to follow will be the same as the audit location option, this will then update the status of these records to '**IN**' and a record position will be allocated to these records. Any records skipped will remain in the current status.

## 4.8.2 Audit Items

The screenshot shows the top section of the Metrofile web application. On the left is the 'metrofile' logo. On the right is the text 'Metrofilerweb'. Below these is a navigation bar with links: Home, Change My Details, Document Manager, eRecord Manager, Reports, Help, and Log Off. At the bottom of the header, it says 'You are here: Filing-Area Audit Items' on the left and 'Logged On As: PAM MC BAIN' on the right.

This option is used to verify all the items within a filing area location, it is also used to move records from location to location.

There are two methods of doing this, Audit Location or Clear Location.

The screenshot shows the 'Audit Items' interface. At the top, there are two dropdown menus: 'Type of Location' set to '7 Digit Loc' and 'Filing Area'. To the right is a 'Location' text box and a 'Clear Location' button. Below this are three main panels: 'Import Files', 'Existing Files', and 'Differences'. Each panel has a large empty area for file lists and a set of buttons at the bottom. The 'Import Files' panel has 'Audit Location' and 'Download Scanner' buttons. The 'Existing Files' panel has 'Update Location' and 'Clear List' buttons. The 'Differences' panel has 'Clear List' and 'Print List' buttons.

The screenshot shows the 'Scanner Config' window. It has two tabs: 'Upload' and 'Config'. The 'Config' tab is active. It displays 'Number of Records Transferred : 0' and 'Current Settings: COM1 (38400bps)'. The 'metrofile' logo is in the bottom right corner.

### **Audit Location**

Use a [Cipherlab barcode scanner](#) to scan the locations and barcodes and upload the results and process.

Select the Filing Area 

Multiple locations can be used using the download scanner option, as the .txt file will contain the location.

Select the 'Download Scanner' button.

Select 'Audit Location' button, the results will be displayed in the **existing items** and **differences** pane.


Any records which are stored in the location but not in the import list will be displayed in the transaction results pane with a clear indication of the current status of the record.

Select 'Update Location' button, the results will be displayed in the **differences** pane.

The record positions are updated based on the scanner file and any record not found in the import list are updated to status of '**AUD**' and record positions are altered to zero.

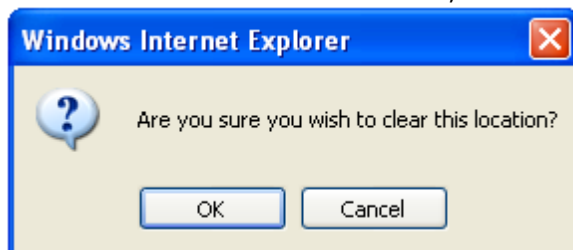
### **Clear Location**

The clear location option when select will not remove the records from the location but will update the record position to zero and change the issue status of the records to '**AUD**' (Audit)

Select the filing area 

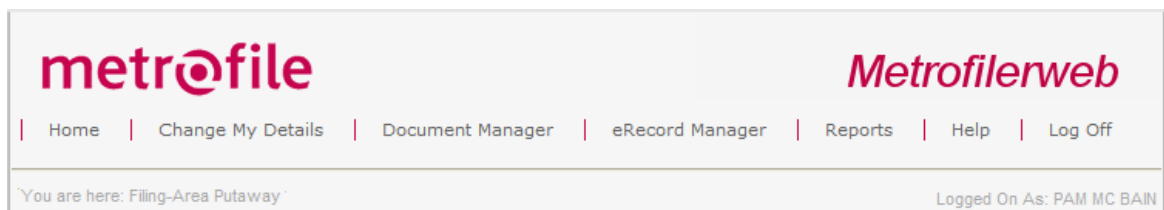
Type or scan in location barcode number in the '**location**' bar.

Select the 'Clear Location' button, user will be warned before process is started.



Once a location has been cleared the steps to follow will be the same as the audit location option, this will then update the status of these records to '**IN**' and a record position will be allocated to these records. Any records skipped will remain in the current status.

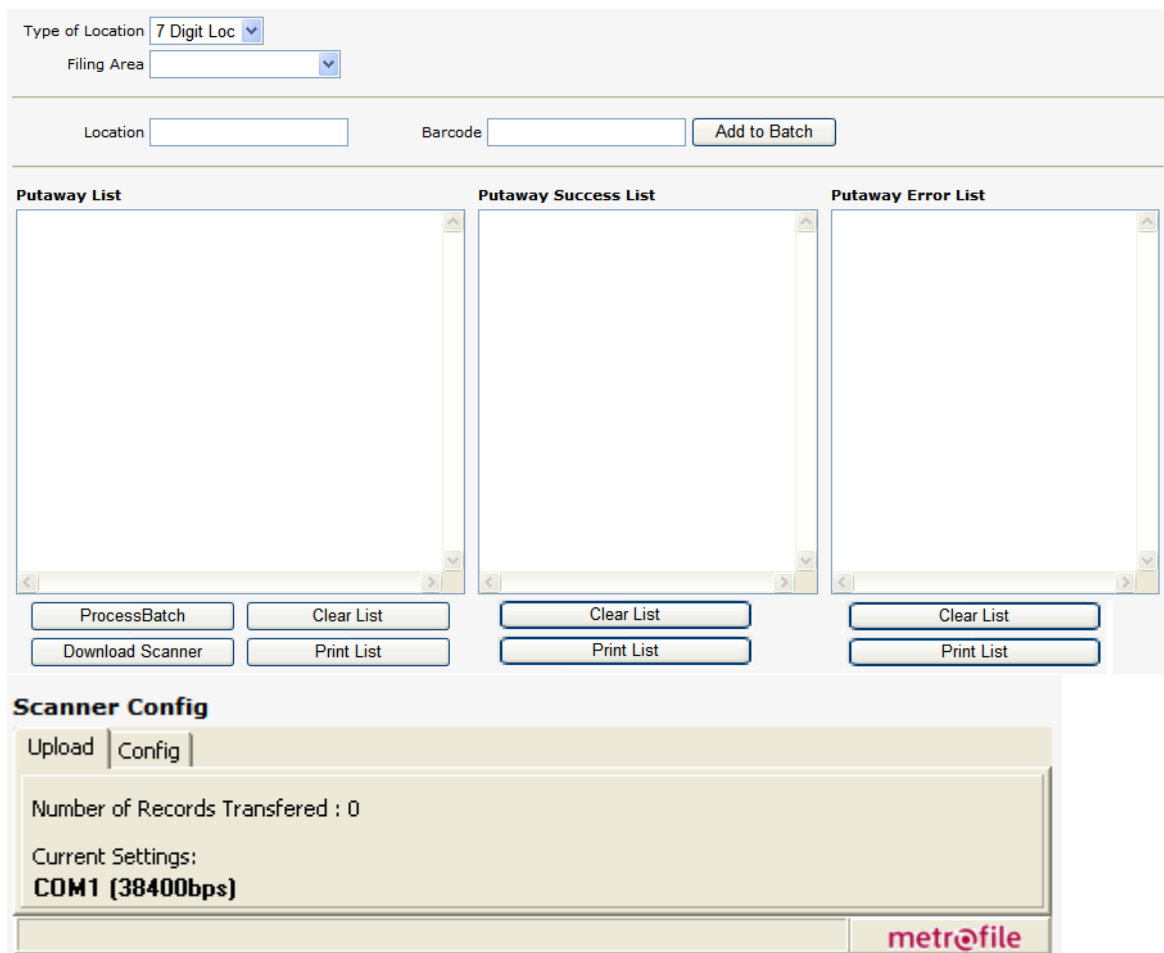
### 4.8.3 Put-aways




Files with no status (first time locating from capture in Metrofiler not flagged in-use) can be put away into locations using this option. When captured in web use [receiving](#) module first.

Items with a status 'P' - Pending or 'I' - InUse (first time locating from Metrofiler capture not flagged in-use) can be put away into locations using this option.

Files and Items which have been [received](#) 'REC' status can be returned in this module.



Select the location type 6 or 7 digits.

Select the filing area 

Type or scan in location barcode number in the 'location' bar.

Type or scan in the Barcode number in the 'Barcode' bar.

You can either add the single entry to an existing batch by clicking on the 'Add to Batch' button, when all records to be returned have been input into the batch returns select the 'Process Batch' button.

The results will be displayed, these can be printed by selecting the 'Print List' button. Once you have finished, click on the 'Clear List' button below the Success/Error Lists before you process the next location.

The user can also use a [Cipherlab barcode scanner](#) to scan the locations and barcodes and upload the results and process.

Select the Filing Area 

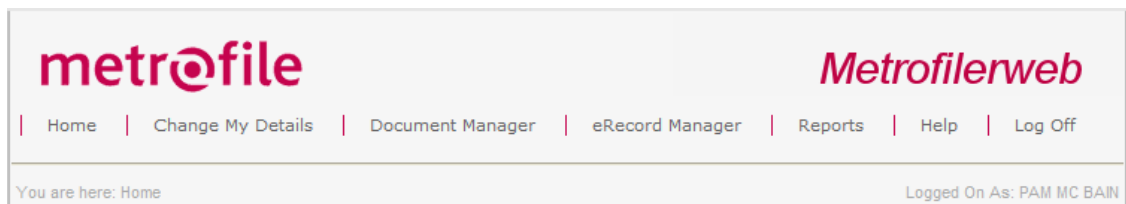
Multiple locations can be used using the launch scanner software option, as the downloaded data will contain the location.

Select the 'Download Scanner' button.

The information will download and appear in the Success/Error Lists.

Once you have finished, click on the 'Clear List' button below the Success/Error Lists before you process the next location.

## 4.9 Receiving



All file/item(s) or containers which have a status in use, requested must first be received in this module before they can be returned to a location using the [filing](#) module. Where track and trace /proxy location administration is utilized the system will check if there are any requests in que, and will warn the user.

The screenshot shows the 'Filing-Area Receiving' interface. At the top, it says 'You are here: Filing-Area Receiving'. Below this is a 'Scan Barcode' input field and a 'Receive Barcode' button. The interface is divided into two main sections: 'Successful Results' and 'Error Results'. Each section has a large text area for displaying results. At the bottom of each section are 'Clear List' and 'Print List' buttons.

Scan or input the barcode label followed by the 'Receive Barcode' button

Successful Results will display the scanned barcode, if the scanned barcode is incorrect the results will be displayed in the Error Results.

Common Error would be that the barcode does not exist in the system, or it has already been received.

Results can be printed using the 'Print List' button.

The 'Clear List' button can be used to remove the results.

Status of all file, item or container is update to **'REC'**



## 4.10 Retrievals

Retrievals presents the user with a list of the Picking Slips of records to be extracted from filing area.

SLA	Picking List	Date	UserId	Requester	Delivery Type	Branch	Department	Delivery Address	Picking Slip Printed	Type
4%	2	26/02/2010 09:18:14	Metrofile\PamMcB	MANAGER PERSONAL	MESSENGER	CCA	BUSINESS	1ST FLOOR SMITH STREET CAPE TOWN	Yes	Retrieval
1%	3	26/02/2010 09:24:14	Metrofile\PamMcB	MANAGER PERSONAL	MESSENGER	CCA	BUSINESS	1ST FLOOR SMITH STREET CAPE TOWN	No	Retrieval

Container	Filenumber	Itemnumber	Filing-Area	Location	FilingMethod	Matched
11F	F1	AA00101				Un-Matched

SLA (Service Level Agreement) is the percentage of the defined number of hours per delivery type.

By default ALL branches and departments Un-Delivered picking slips are displayed when the screen opens.

To filter the picking slips by Branch and Department click on the button next to the branch/department and the list of branches the logged on user has access to will be displayed highlight the branch/department and click on the select button and the picking slips will be filtered.

The results of each column can be sorted by clicking on the column heading.

Status option by default 'Un-Delivered' picking slips is selected, click on the button to filter for the 'Completed' when selected the date filter option is displayed.

Print the picking list which will indicated which records/items are to be retrieved together with the current location and record positions, select an individual picking list to be printed by clicking on the picking list number and then select the 'Print Picking Slip' button.

There are three additional options for printing, they can be selected individually or all options by clicking in the tick box next to each option, insert a picking list number range, then select the 'Print Picking Slip' button.

Once the record has been found and physically removed from the location, the record needs to be matched up to the picking lists.

To match items scanning the record number into the Input Barcode field and select the 'Process' button or press enter the system will auto locate the associated picking slip and record item the corresponding record status column 'matched' will then change from un-matched to Found. when system option to auto locate is not, checked user must first click on the picking slip before scanning the barcode. Continue this until all records in the picking list have been Found.

If you have the picking slip number use the 'Find' option.

Do Not Print Previously Delivered on Delivery Note defaults to system set option, when checked only barcodes where column matched is not 'delivered' will be printed on delivery note. un-check to print all previously delivery barcodes on delivery note. Print the Delivery slip, select the 'Print Delivery Note' button two copies of the delivery note are automatically generated. The option print items on delivery note can be selected by checking the option box.



**When the requester has an email address defined and system options receive email delivery notes is checked, an email is generated automatically by Metrofiler using the mailing application on the local workstation the clerk will be prompted to send the email.**

These records will now be logged as status 'OUT'. and picking slip with matched entries will be cleared.

Picking Slips can be deleted if the file or item on the picking slip has not been matched.

---

5 e-Record Manager

metr@file

Home

Change My Details

Document Manager

eRecord Manager

Reports

Help

Log Off

Metrofilerweb

You are here: Home

Specific Search

Cross Query Search

Image Centre

ePending


Logged On As: Pam Mc Bain


## 5.1 Specific Search

This option enables the user to search for e-Records based on specific input values relating to the data captured.



**Search criteria is required before the search button is selected.**

**Branch: Department: Record Type:** are all selected from the  button; user will only be able to select the option to which they have been granted access. The order of selection is from the top down user will be warned as to which option precedes the selection if incorrectly selected.

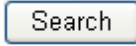
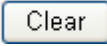
**Record Category:** Can be selected from the  button or can be blank, group order number must be defined in order to build the tree view.

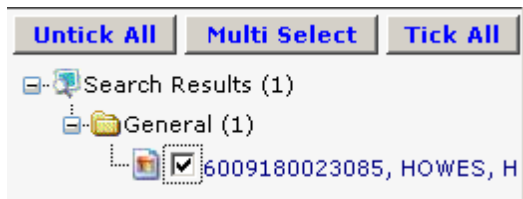
Displaying the results of your search:

- **Grouping Order:** is specified by inserting a numeric value in ascending order for the sequence in which the user would like the folder tree view to be built.
- **Sort Order** is specified by inserting a numeric value and option of **ascending** or **descending** for the sequence in which the user would like results displayed.
- **Collapse Group:** by default all groups are collapsed in the tree view if you wish to expand the tree view for a selected group uncheck the ☐ box.

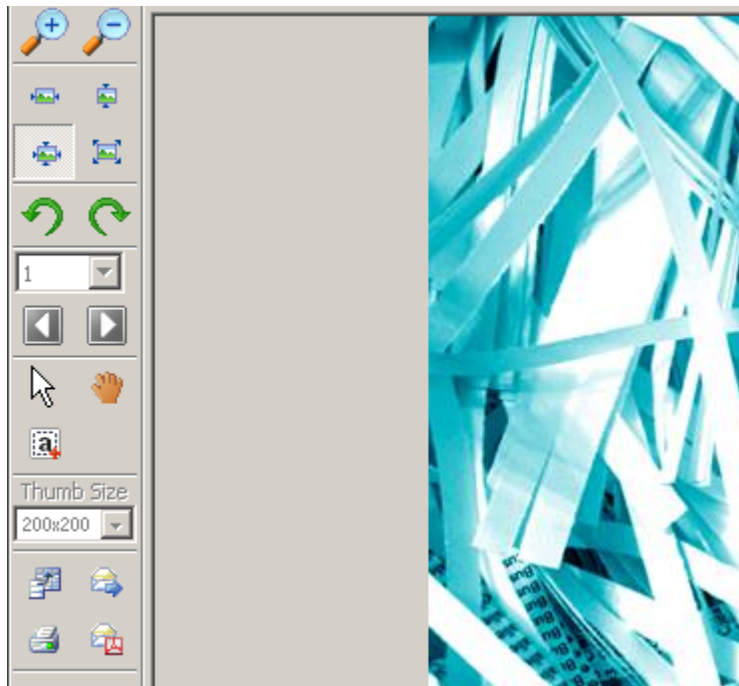
By default partial searching is enabled, do specific searching uncheck the

Use Partial Searching ☒ option.





Once all the required search parameters have been defined select the  button or  button to redefine your parameters.



e-Record index information is displayed in the tree based on the grouping and sorting, the number of search results are displayed (39) and per grouping, check the **Single Select** or **Multi Select** options before checking the box/es related to the image you wish to view or use the **Tick All** option, note that all e-records in the search result is selected, to remove the selection select the **Untick All** option.



Images are automatically displayed in the zoom mode or thumbnail mode as they are selected from the information tree.

Images can be printed , launched into windows  or emailed  or  create multi page pdf and email by selecting the applicable button.

Option **Multi Select** allows multiple images to be selected and are displayed in thumbnail mode or **Single Select** in order to change to single mode click on the 'multi select' button, where images are displayed in zoom mode only, **Tick All** allows all images in search result to be selected or **Untick All** de-selects all selected images.

Index information is automatically displayed per individual e-record selected.

Field	Value
ID Number	6009180023085
Surname	HOWES
Initials	H G
Prefix	CRS
Employee No	32456

The captured data can be edited by selecting the [ePending](#) option on the menu.

---

## 5.2 Cross Query Search

This option enables the user to search for eRecords based on un-specific input values relating to the data captured, specifically where the values of capture are not known by the user at the time of searching

Field Description	Grouping Order	Sort Order	Collapse Group	Field Contents
Branch :	<input type="text"/>	<input type="text"/> Asc	<input checked="" type="checkbox"/>	<input type="text"/>
Department :	<input type="text"/>	<input type="text"/> Asc	<input checked="" type="checkbox"/>	<input type="text"/>
Record Type :	<input type="text"/>	<input type="text"/> Asc	<input checked="" type="checkbox"/>	<input type="text"/>

**Branch: Department: Record Type:** are all selected from the button; user will only be able to selected the option to which they have been granted access. The order of selection is from the top down user will be warned as to which option precedes the selection if incorrectly selected.

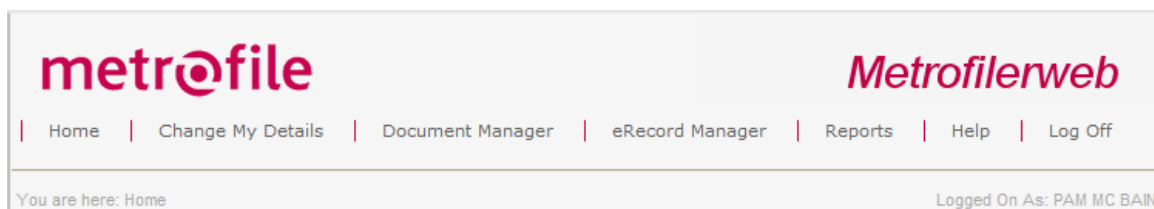
**Record Category:** Can be selected from the button or can be blank, group order number must be defined in order to build the tree view. Sort order is optional.

Type in your query string and the system will search across all defined Record Type fields.

Try limiting the string to increase the success of your search.

The captured data can be edited by selecting the [ePending](#) option on the menu.

## 5.3 Image Centre



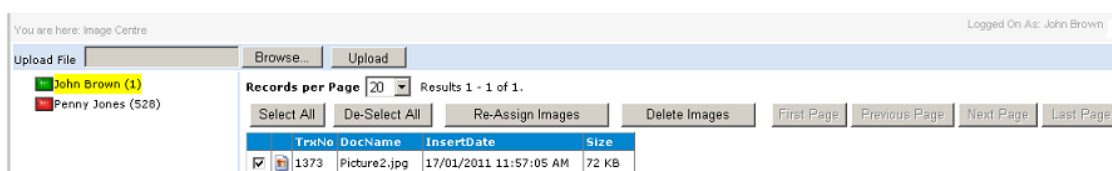
The **Image Centre** is the default repository where all pending image/documents are selected using the browse options. These images/documents can be re-assigned to other users within the same group which then appear in the relevant users ePending folder for capture into the system by means of the [ePending](#) option.

### Please note

- eRecords shown in these ePending folders are unsearchable until data has been capture against these eRecords
- Only users with access granted to Image Centre within the applicable Image Centre Group will be displayed in the tree when user is an image centre administrator.
- if user does not belong to a group but has access to image centre they can upload and capture but cannot re-assign.

Document types which can be selected are as follows:

\*.JPG | \*.JPEG | \*.TIF | \*.TIFF | \*.PNG | \*.PSD | \*.PDF | \*.XLS | \*.EML | \*.HTML | \*.DOC



Administrator can upload directly to a users ePending folder by selecting it prior to browse and upload.

### [Re-Assign Images](#)

All uploaded images/documents remain selected, this allows any images to be quickly re-directed to another user if required. When re-assigning user has the option to add comments which will be seen by the administrator/user, only users within the same group are accessible.

Individual image/document or all can be re-assigned by clicking in the check box ☒



or **Select All** button followed by the **Re-Assign Images** button', select user to reassign to from the list followed by **re-assign** button, else **abort** to cancel, **De-Select All** button to reject selection.

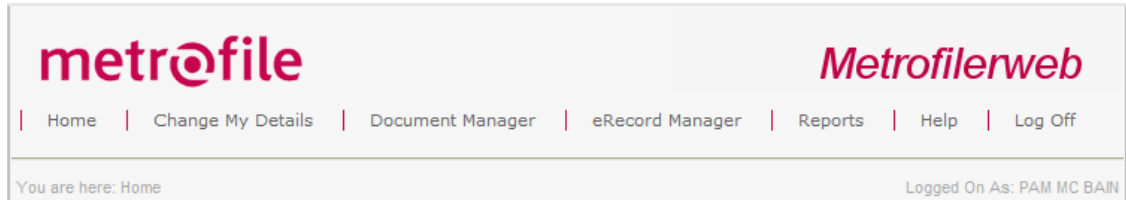


The screenshot shows a dialog box titled 'ReAssign To:'. It contains a dropdown menu with 'Penny Jones (528)' selected. To the right of the dropdown are two buttons: 'Re-Assign' and 'Abort'. Below the dropdown is a text area labeled 'New Comment:'.

### Delete Images

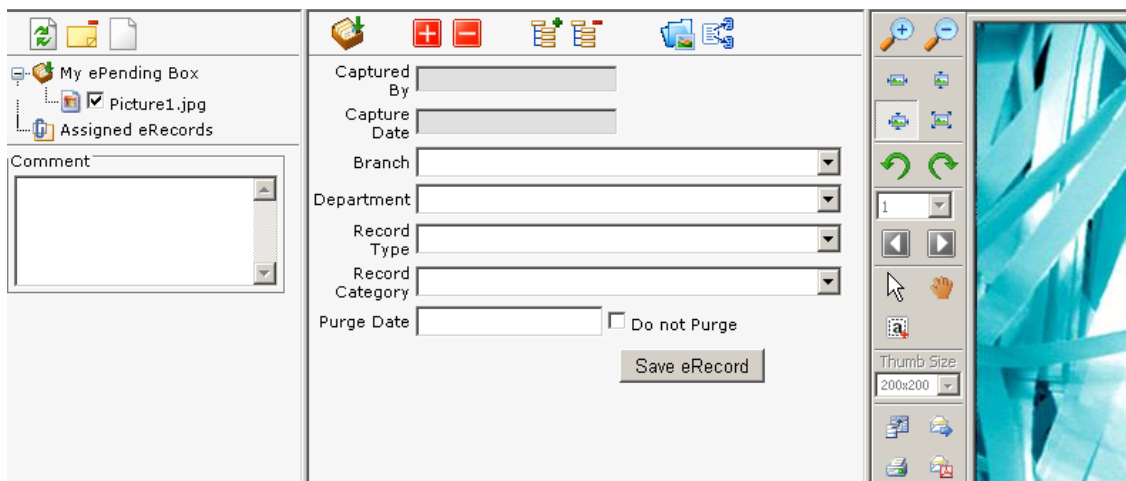
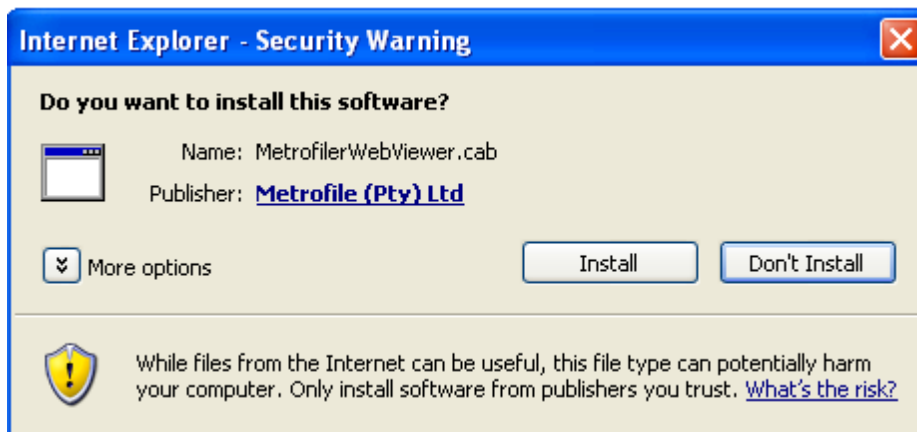
Individual image/document or all can be deleted by clicking in the check box ☒ or **Select All** button followed by the **Delete Images** button', **De-Select All** button to reject selection.

## 5.4 ePending



Images which have been assigned to the logged on user by means of the Image Center can now be indexed using this module any imported indexed information can be edited in this module.

For first time use the user will be presented with the following option, select install, to install the metrofilerwebviewer.




The first select an image or images from the unassigned images this will allow the user to view the images before capture takes place as images are assigned after a record has been inserted.

Select the **Add a new record**  button

Select the **Branch** 


Select the **Department** 

Select the **Record Type**  defined fields of capture will be displayed,

Select **Record Category** 


Select image/s ☒ from my ePending box, if comments are visible per image/document selected, these comments are added via the image centre.


Capture the required meta data and post  selected image is automatically assigned and removed from the user ePending box.


To Show/Hide my ePending Box select  button, displays assigned and un-assigned eRecords during session.

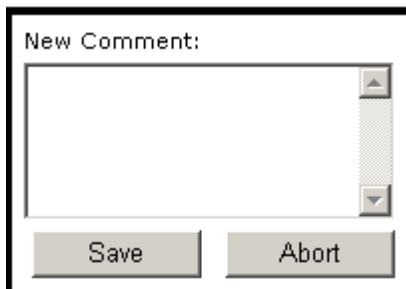
Select the **Assign Selected eRecords**  button to assign multiple eRecords to existing same meta data.

If incorrect images are assigned or editing required select image/s ☒ from the assigned

images and then **Un-Assign Selected eRecords**  button, this will restore them to the ePending Box.


To reject un-assigned images select  button, comments can be added, image/document will then re-appear in the image centre.

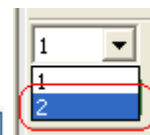
Add new comments select  button, inset comments and select save button, or abort to cancel.




A dialog box titled "New Comment:" with a large text area for input. At the bottom, there are two buttons: "Save" and "Abort".

If user is granted permission to delete eRecords  button is visible

To merge un-assigned or assigned images select images ☒ to merge followed by the merge image  button.



To split un-assigned or assigned images select image ☒ number from viewing pane to split from, followed by the split image  button.


To refresh screen display select the  button.

Image types which cannot be view



can be launched



previewed closed and then indexed.

---

## 6 Reports

**metr@file**

*Metrofilerweb*

[Home](#) | [Change My Details](#) | [Document Manager](#) | [eRecord Manager](#) | **[Reports](#)** | [Help](#) | [Log Off](#)

You are here: HomeLogged On As: PAM MC BAIN



### Custom Developed Reports Can be viewed and exported to excel

Please select the Report you wish to View

Branch	<input type="text"/>
Department	<input type="text"/>
Record Type	<input type="text"/>
Filing Area	<input type="text"/>

GO

## 7 Cipher Lab Barcode Scanner

### Series 8001

Please note that the scanner must be configured after all the necessary cables have been attached to the PC and docking station.

The following files are required:

CipherLab ProgramLoad.exe (version 1.23)  
Programload.ini

Metrocipher.exe (version 4.00 22/10/2009)  
MetroCipherWeb.cab (installed via the web installation package)

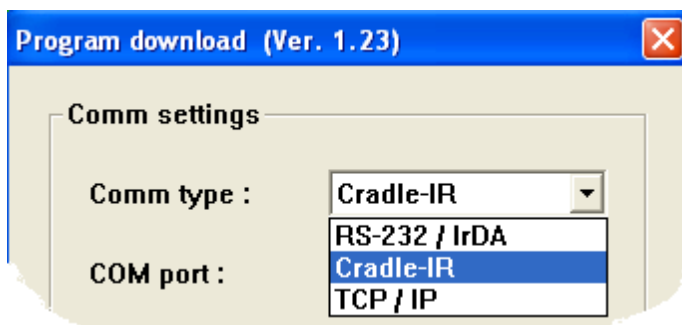
Metrofiler\_Serial.syn (version date 22/10/2000) only used with Metrofiler Document & Warehouse Manager & Web- when loaded screen display <V4.00>  
Metrofiler\_Serial.ini

Metrofiler\_SerialIR.syn (version date 22/10/2009 - Infra Red Docking) only used with Metrofiler Document & Warehouse Manager & Web - when loaded screen display <V4.00>  
Metrofiler\_SerialIR.ini

MetrofilerProxyLoc\_Serial.syn (version date 22/10/2009) only used with Metrofiler Web track and trace - when loaded screen display <V4.00 PL>  
MetrofilerProxyLoc\_Serial.ini

MetrofilerProxyLoc\_SerialIR.syn (version date 22/10/2009 - Infra Red Docking) only used with Metrofiler Web track and trace - when loaded screen display <V4.00 PL>  
MetrofilerProxyLoc\_SerialIR.ini

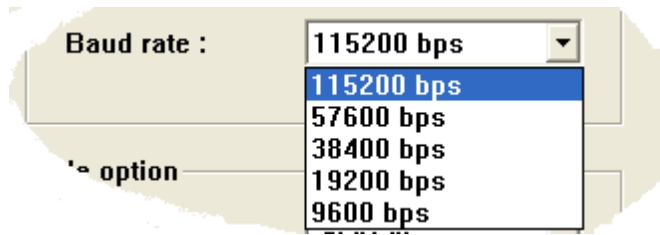
Program download communication settings based on the type of docking stations and cable being utilized.



Comm type options : RS-232/IrDA or Cradle -IR or TCP/IP

COM port : COM 1 to 255 select the PC port where the docking station is connected to, this setting needs to be configured

Baud rate: options

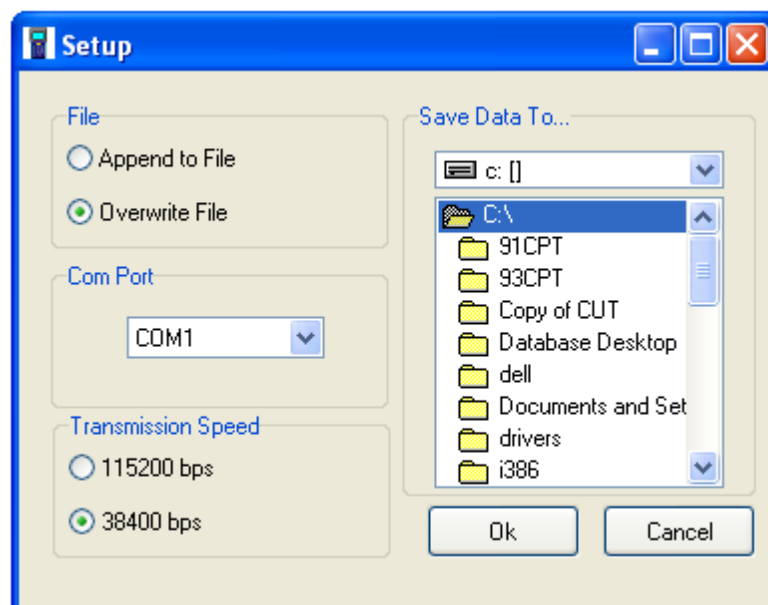
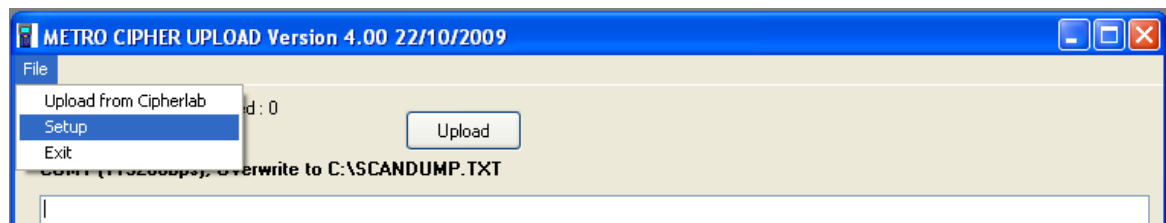


Where infrared is used to communicate with the cradle, sometimes the transmission speeds is too high.

Go to the scanner Utilities => System Settings => Transmission speed menu and set it to 38400bps.

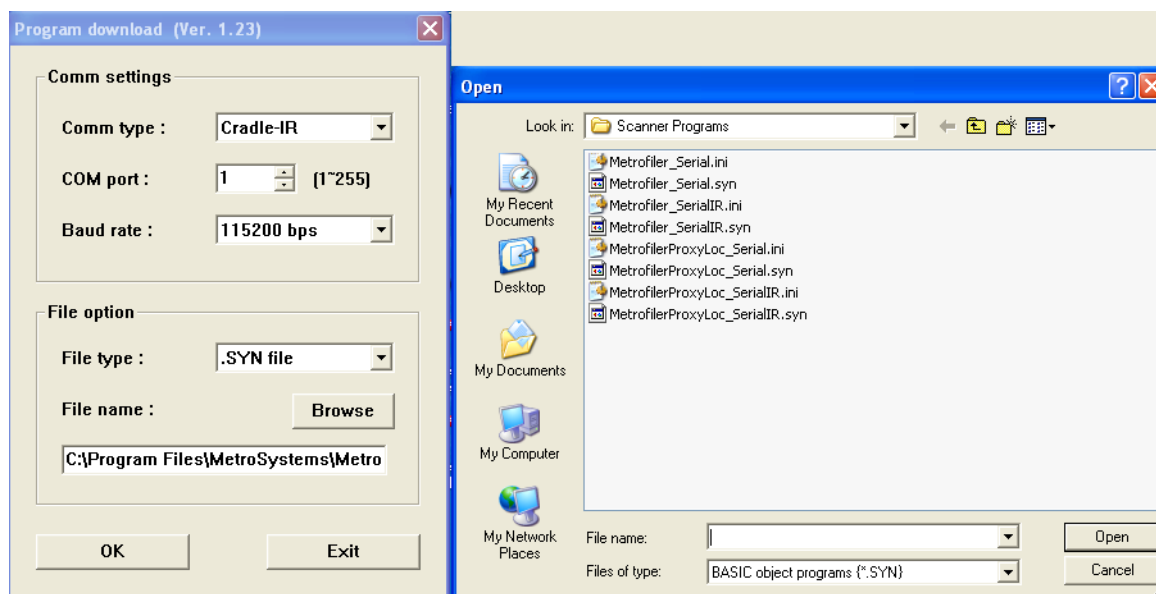
Then use the MetroCipher.exe and also set the transmission speed to 38400bps in this version.

If it does not want to download please unplug the scanner from the power outlet and also from the PC and then plug it back in to reset the connection.



Select the **File option**, file type .syn which is to be downloaded use the **browse** button to located the appropriate .syn file.

Select **OK** to save settings and **Exit** to close.



To Program the Metrofiler program or Metrofiler Proxy Location

1. Press 7 and 9 and Power simultaneously
2. Choose 6 > Load Program
3. Choose 2 > Load Basic
4. Download Basic > Choose 1 Cradle-IR or IrDA
5. Baud Rate > Choose 115200 or 38400
6. Place scanner in cradle \*Down Load Ready\*
7. Open Program Load exe upload File Metrofiler.syn or MetrofilerProxyLoc.syn (Using ProgLoad.exe)
8. Switch on Scanner > New Program Select any button [Other] Skip (if ESC is selected program is cleared and new program loaded)

Screen display

<METROFILER> <V4.00> or <V4.00 PL>

1. Collect Data
2. Upload Data
3. Utilities

Number of records on scanner (00000)

Date / Time - This can be set by accessing the Utilities menu

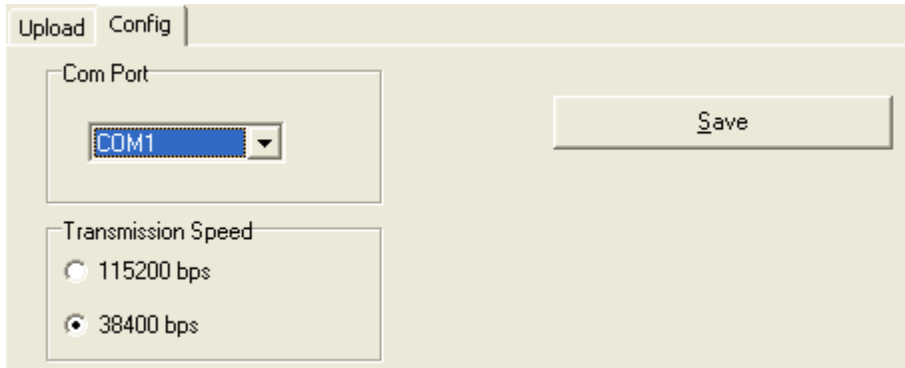
To access the Utilities menu a password is required, this can be obtained from your system administrator.



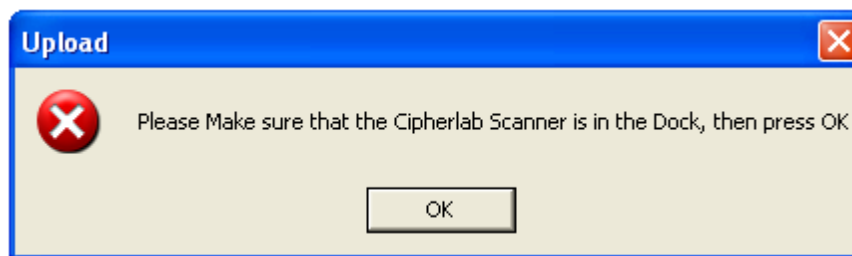
## Uploading from Cipher Lab

Accessed via the [File Proxy Acceptance](#) menu option.

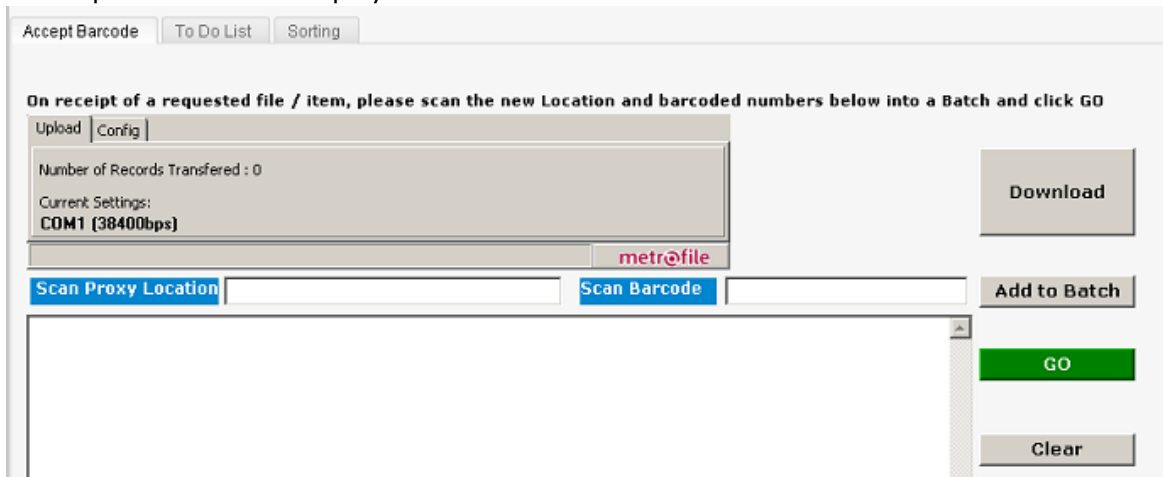
Communication port and Transmission Speed can be configured by selecting the config tab.



Place the barcode scanner in the docking station select the **upload** button you will be prompt for confirmation select the OK button.



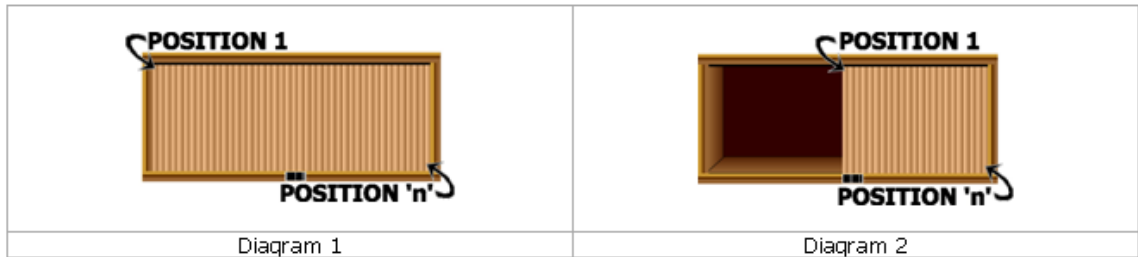
Data uploaded will be displayed.



Select the **GO** button and the result will be displayed, before next upload select the **clear** button.

## 7.1 Using Portable Scanner

The scanner is used for locating first time files, auditing locations and returning retrieved files. The use of the scanner is fairly standard; other than the direction of the scanning of files.



### i) Using the Hand Held scanner

To scan the records into locations using the hand held scanner:

Select the 'Collect Data' option on the scanner by pressing enter or '1'

The scanner will read 'Scan Location/Barcode'.

Scan the bar code 'location label' first.

The scanner will now read 'Scan Barcode'. Now scan the bar code 'file label' and insert the record into the shelf that has just been scanned.

For Locating first time Files – scan and locate from position 'n' to position 1. (See Diagram 1 & 2)

For Auditing Files – scan from position 1 to position 'n'.  
(See Diagram 1 & 2)

For Returning Retrieved Files – Fill in from the left of position 1.  
(See Diagram 2)

Repeat this procedure until all the records have been randomly inserted into selected location wherever space was available or the bay has been audited.

<ESC>=Finish

Take the scanner back to the computer and 'dock' the scanner in the docking bay.

## 8 Status Codes

Status	Description	File/Item/Container
	Data-Capture	C
	Data-Capture	F
AUD	Container in Audit	C
AUD	File in Audit	F
BCH	Container Barcode Changed	C
BCH	File Barcode Changed	F
BCH	Item Barcode Changed	I
BIP	Bulk-Import Purge	C
BIP	Bulk-Import Purge	F
BIP	Bulk-Import Purge	I
CON	File in Container	F
DEL	Deleted	C
DEL	Deleted	F
DEL	Deleted	I
DES	Destroyed	C
DES	Destroyed	F
FOUT	Requested	F
FREQ	Requested	F
I	Stored in File	I
IN	Stored in Filing Area	C
IN	Stored in Filing Area	F
INT	In Transit	F
INT	In Transit	I
INUSE	In Use	C
INUSE	In Use	F
INUSEI	Metrofilerweb	F
IU	In-Use	I
IUI	Metrofilerweb	I
L	Stored in Filing Area	I
MET	Off-Site	C
MET	Off-Site	F
MET	Off-Site	I
NF	Not Found	C
NF	Not Found	F
NF	Not Found	I
O	Booked-out to a User	I
OI	Metrofilerweb	I
OUT	Booked-out to a User	C
OUT	Booked-out to a User	F
OUTI	Metrofilerweb	F
P	Data-Capture	I

PW	Permanently Withdrawn	C
PW	Permanently Withdrawn	F
R	Received	I
REC	Received	C
REC	Received	F
REQ	Requested	C
REQ	Requested	F
RET	Returned	C
RET	Returned	F
RET	Returned	I
RI	Inter-Filing	F
RQ	Requested	I

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