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Restore PLC

RSWeb Portal Guide

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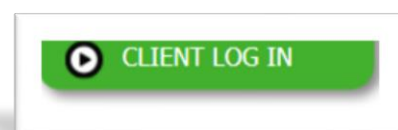


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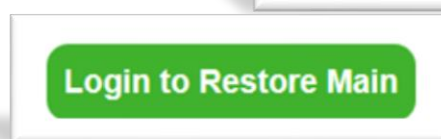
Logging into the Portal

To login please follow these steps but please note that you will be prompted to change your password the first time you login as a new user or following a reset. Passwords must contain a combination of upper and lower case letters, numbers and special characters such as !\$% etc.

1. Open Internet Explorer and go to website: www.restore.co.uk
2. Click on the Client Log In wording at the top right of the screen



3. Scroll down the next page to the Records Management Portal Login section on the left hand side and select Login to Restore Main



4. Enter your user name and password into the appropriate fields then press Login

If you are required to change your password the following box will display. Please follow the protocols for passwords and enter the new password in both the new and confirmation boxes before selecting Change:

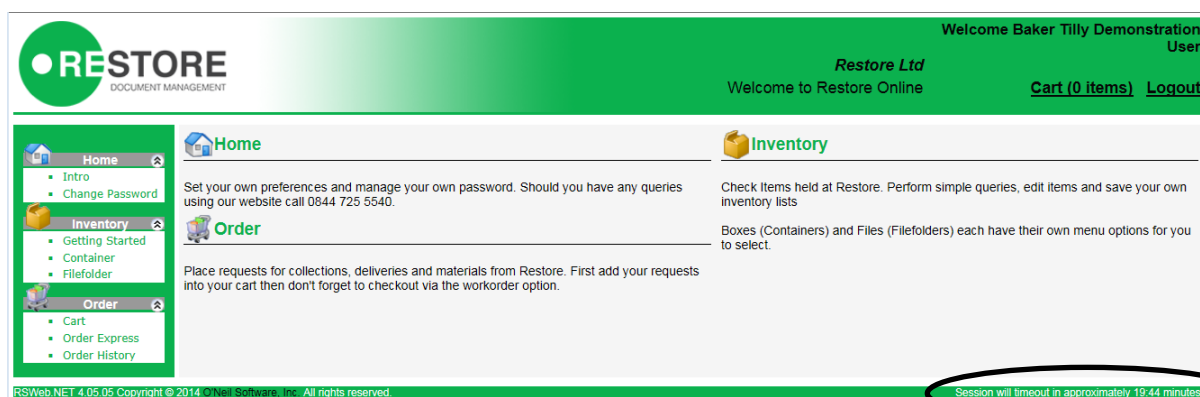




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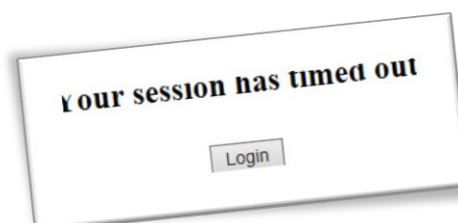
Welcome Page and Session Times

You will now be connected to the server and logged in ready to begin using the system – you should see a Welcome screen as below showing your name in the top right corner of the screen:



Please note that your session will be timed – the initial time given is 20 minutes and will be reset to this each time you do anything in the portal. However, should leave the portal logged in without activity the session time will count down and eventually log you out at which point you would need to log back into the portal. The session time is displayed at the bottom right of the screen.

Should the session time out this will be displayed in the bottom right corner of the screen, should you fail to notice this and click on any links the following message will be displayed:



Should the system time you out and you need to log back in please close Internet Explorer and repeat the [process to login](#). Any boxes or files that you may have added prior to your session being timed out can be found by using the searches detailed in the Searching for Files / Boxes and Adding to Cart section in this guide. The best search to use in this scenario is the 'Pending Collection' item search.

Navigating Your Way around the System

Whilst navigating your way round the portal it is important that you only use your mouse to select the various portal menu or toolbar options and the tab button on your keyboard or mouse in the add edit forms.

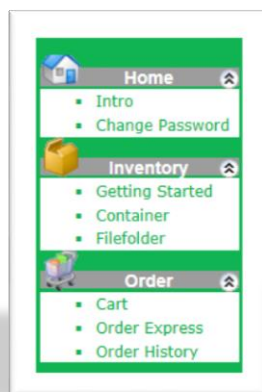
Under no circumstances should the back or forward buttons in Internet Explorer be used whilst logged into the portal as the use of these functions will cause your session to fail and your session will be terminated. Should this happen you will need to login to the portal again.





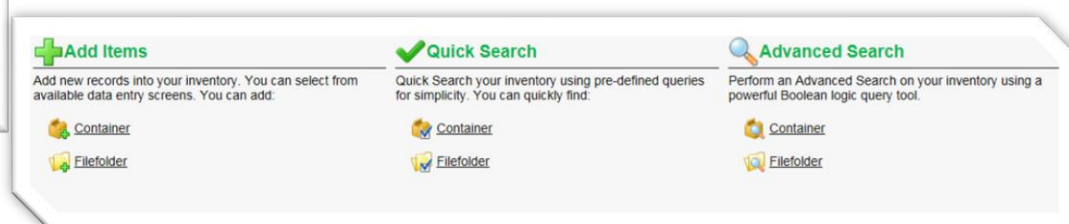
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Menu Options



Using the links on the left hand side of the screen you can navigate your way round the system.

Intro will take you back to the welcome page whilst Getting Started will provide a page with quick links from which you can select to add new boxes or files or search for items already in the system as per the image below.



Clicking on the Container or Filefolder options on the left hand side of the screen will open the relevant grid from where you will find options to add new items, edit existing items and search for existing items using the drop down menus available.

The Cart is accessible via the menu on the left hand side or via the Cart button at the top right of the screen below your name and next to Logout. In the cart you can remove items that you are not ready to be released for collection or that have been added accidentally. You can also add materials such as flat pack boxes and barcodes in your cart.

You can change your password at any time whilst logged in by selecting the Change Password option from the menu on the left hand side. When you select this option you will be presented with the following and will need to enter your current password in the Old Password field and a New Password in both the New and Confirm New Password fields ensuring that your password meets the password policy as defined in the login process.

In the container and filefolder grids and the cart you are able to select the column format you wish to view. In order to do this you would need to select Options, Choose Column Format. In the menu that opens you can select the format you wish to view from the dropdown list before selecting submit to secure your selection.





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Forms for Archiving New and Editing Existing Items

The forms detailed below are available for the addition of boxes files, each form is different and the correct form must be selected from the available forms drop down menu for the item you are archiving to ensure an accurate inventory is created. An accurate inventory will not only be of use when recalling items but will also mean that you have a reliable account of your archiving records and meaningful reporting can be produced.

Many of the fields in the add forms are mandatory, such mandatory fields are indicated by the presence of an asterisk and failure to enter information into these fields will result in the submission of the form being rejected. In addition some fields are masked and require certain information (numeric or alphanumeric entry at a particular length) such as a barcode of 14 or 15 digits. Should you enter 12 digits in the barcode number field the form will not accept your entry upon submission and details what has not been accepted will be shown on screen so you may correct this and resubmit your entry.

Each add form has its own corresponding edit form should you need to edit any of the information following initial input. These again are selectable from the available forms drop down box but will only be available for existing items entered. Edit forms are slightly restricted and you may not be able to edit all fields.





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Adding New Items (Boxes and Files)

1. From the welcome screen select 'Getting Started' and then Container, Filefolder or Tape under Add Items / alternatively from the Container, Filefolder or Tape grid select Options, Add.
2. The relevant add form will then open as per the picture below (please note that each add form is different, the one pictured below is the most simplistic of all and is for mixed file boxes).

3. You will need to select the correct Add Form for the box you are archiving. To do this please select the correct form from the drop down box under Available Forms.
4. Attach a box barcode to the box / file barcode to all files / tape barcode to all tapes (you can do this as you go along or in advance).
5. Complete the details required on the form taking care to input the details correctly for the item in question.
6. Press the 'Submit' button at the bottom right of the page once all details have been completed.

Your box or file will now be in the system with a status of Pending. Continue to add the rest of your items and once you have entered them all move onto the next stage. You will notice that the options at the bottom right of the screen change once you have submitted your first box. The new options are Submit, Reset Form and Back to Results.





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7. Select 'View Grid' at the bottom right of the Add screen.

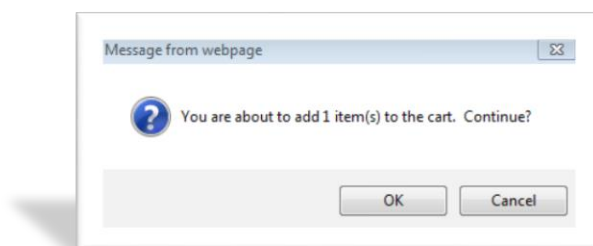
This will now take you to the Container / Filefolder / Tape grid where you will see all the items you have just entered. Providing you are happy with the details entered for the items move onto step 8, however if you need to make any changes please select the item in question from the Grid and either double click on it or select;

- 'Options'
- 'Edit'

You will need to select the correct Edit form from the available forms drop down list (Client or Non Client). Once you have made the required changes select submit then move onto step 8.

8. Open the following dropdown menus in order:

- 'Results' and select 'Select All'
- 'Options' then select 'Add to Cart'
- The following message will appear. Click on OK if you are happy to proceed.



9. The following screen will appear – on this screen please ensure that you change the Service Type to Pickup or Deliver as appropriate. Whilst the requestor is not a mandatory field please ensure you enter the requestors name in this field for auditing and reporting purposes. Please ignore the Cost Centre field and enter any relevant notes relating to the collection or delivery in the Comments field. Once all details have been completed click on Add to Cart.

You will now see an Add to Cart Summary listing the boxes or files you have added successfully and under your name at the top right hand corner of the page the Cart (0 items) will now show with the quantity of items you have added – or will be increased by the number you have just added if you already had some in your cart.

10. If you have more boxes, files or tap3es that you wish to process then select Back to Results and repeat the process.





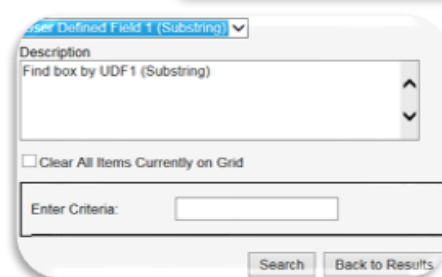
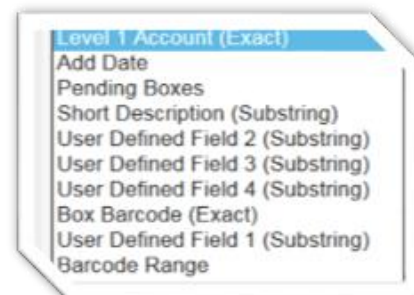
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Searching for Items and Adding to Cart

You have several quick queries available to use. The Pending query is very useful to find all items that have not yet been checked out of your cart. More specific searches are also available and are named to give you an idea of what they will do.

Please follow this process any time you need to find a box or file.

1. From the 'Getting Started' menu select Container or Filefolder as appropriate under Quick Search – this will open the Quick Search screen.
2. Select the relevant quick search query name from the drop down list choose the search that will suit you best. Enter the relevant information into the field and click Search. A grid will open displaying the results.



When you have the results you are looking for displayed in the Container or Filefolder grid move to step 3.

3. Open the following dropdown menu:
 - 'Options' then select 'Add to Cart'
 - A message box will appear advising that you are about to add x number of items to your cart.

Click on OK if you are happy to proceed.

4. When the Add to Cart box appears you will need to complete this with your name / the name of the requestor and any comments you feel may be relevant to our driver performing the collection.

Click on Add to cart and you will see a summary sheet of the items added.

If you have completed your tasks please log out otherwise go back to Getting Started/Results.





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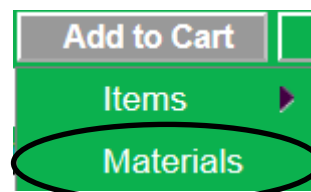
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Ordering Materials and Adding to Cart

From the Cart you can request material deliveries. Materials include flat pack boxes and barcodes; these are all supplied individually.

To add materials to your cart, from within the Cart menu, click on Add to Cart and select Materials.

Select the materials you wish to order from the drop down list, and the quantity required. Add in the requestor name and add any comments, then select Add to Cart.



Material	Quantity
R10-Small Box10x11x15	50
Requestor is Mandatory	(For Internal Use Only)
Sam	
Comments	
Add to Cart Back to Cart	





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Checking Out Your Cart

1. From inside your cart select Checkout then select Work Order from the drop down list.
2. The Submit Orders page will now be displayed.

Here you will need to make sure that the Work Order Account, address and contact details displayed are correct for the required collection or delivery by completing the following in order:

- Check that the first dropdown box displays your account number. If it does not please type this in or select from the drop down list, please repeat for the second and third boxes as appropriate for delivery / collection

The screenshot shows a form titled 'Work Order Account'. It includes a dropdown menu for 'Account' (showing 'TEST1'), a 'Choose Address' button, and several input fields for 'Contact' (Jack Green), 'Address Line 1' (Unit 5 Salbrook Road), 'Address Line 2' (Redhill), 'Address Line 3' (RH11 5DY), 'Phone' (01293 780055), and 'Fax'. There is also a 'Service Priority' dropdown (Normal Transport) and a 'Requested Fulfillment Date/Time' field (10 February 2015 17:00). An 'Authorization (optional)' section contains fields for 'First Name', 'Last Name', and 'Password'. At the bottom, there is a checkbox 'Use the same account and address the next time an order is created' and buttons for 'Add Notes', 'Create Workorder', and 'Back to C'.

- Click on the 'Use default delivery address' button below the fax number field to populate the contact and address information. If this is incorrect and other addresses are assigned to the account you can click on 'Choose Address' and select an alternative address as appropriate.

- You may edit the Contact name and Phone number as appropriate.

If you will be using the same account and address each time please tick the box at the bottom of the screen to save your preferences.

☒ Use the same account and address the next time an order is created

- Service Priority should be set to Normal Transport and the Requested Fulfillment Date/Time should populate to show the next working day.

This screenshot shows a 'Choose Address' button, a 'Service Priority' dropdown menu (set to 'Normal Transport'), and a 'Requested Fulfillment Date/Time' field showing 'Wednesday, August 20, 2014 5:00 PM'.

3. Once you are happy with these details select Submit Orders.
4. A work order summary will be displayed and will detail all items ordered. At the top under the order Summary heading it will state the number of items ordered / rejected, if any are rejected you will need to review these as the order will not have gone through.

You can print a copy of this work order summary to check off against when your order is delivered if required. Please logout once you have finished.

