

SEND FILES AND BOXES IN TOTAL RECALL

RECORDS management



- 1** Get boxes and barcode labels before you enter information in Total Recall. Boxes should be standard records center boxes. Boxes and labels are available in the Church Office Building supply store or from the records center. Labels should be preordered from the records center a day or two before you add items to the system. The label should be placed on the short side of the box in a central location.
- 2** Open your web browser and go to recordscenter.ldschurch.org. Enter your LDS Account username and password. If you are unable to access Total Recall, contact your department's records coordinator, or call the records center at 1-801-240-2204.
- 3** Click **Add**.
- 4** Select a Department from the Customer drop-down menu (in Total Recall, departments are called customers, and divisions are called departments). After you select a department, the system will automatically update the screen and provide fields for data entry.
- 5** Enter the 12-digit preassigned box barcode label in the Barcode # field.
- 6** Enter the Customer Box # in the corresponding field. If your department has a box numbering convention, enter the information here. Otherwise, enter **Box 1** for the first box, and then add other boxes in the sequence as needed.
- 7** Enter information in the Description field that best describes the records being placed in the box. This field will allow up to 900 characters to be entered in the system. More specific information in this field will better enable other users to find and retrieve the box.
- 8** Enter ranges for the box contents in the Sequence field, for example, the beginning and the ending letters of records filed in alphabetical order or a range of invoice numbers.
- 9** Enter the name of the individual who oversees the records in the Custodian field. Multiple names may be entered in this field.
- 10** Enter the date ranges in the From Date and To Date fields. The end date is important because Total Recall uses that date to determine how long to retain the box. If you don't have a date range, enter the current date in both fields.

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SEND FILES AND BOXES IN TOTAL RECALL (continued)

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11 Click in the Retention field. To see a list of retention codes, select **Browse**. To see a list of all retention codes, you can click the **General Retention Schedule** link on the home page in Total Recall or review your department's records management plan.

12 In the Indexed Notes, enter additional information about the history of the box.

13 Once you have entered information in the required fields, click **Save** to add the box to the system. *You must click the **Save** button after each box, or the information will not be added to the order.*

- a.** Note: If you are adding multiple boxes with the same information, you can click the **Retain data entered on add** check box, and Total Recall will retain the information for the next box. You will then need to update the box barcode number and any other fields where the information is different from the previous box.

14 Once information for all the boxes is entered, click **Close**, and advance to the review screen.

15 The View Order screen displays a list of all items you have entered. If changes need to be made to a single item, click the **pencil icon** to edit item. Enter the changes, and click **Save**.

- a.** If you need to add individual files to the box, you can do so by clicking on the **folder icon** (Add Item to Parent).
- b.** For each individual file, enter the customer file number and a description in the corresponding fields. These fields work in the same way as the similar fields for box information. If you don't have a

customer file number, you can leave that field blank, but the description field is required.

- c.** Click **Save** after each file entered. A list of items added to the parent (box) will show below in the window.
- d.** Once you have finished entering files, click **Close**. The system will automatically update the view order screen with the added files.

16 Click **Send Order**.

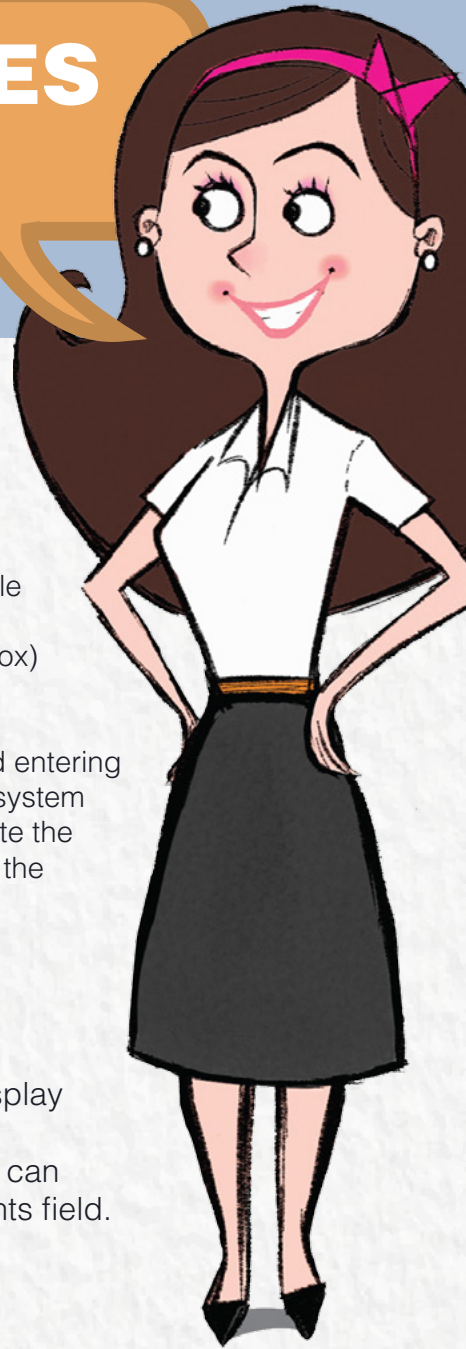
17 The Complete Send Order screen will display your address. If you have additional comments, you can enter them in the Comments field.

18 Click **Send**.

19 You have successfully submitted your order. The final screen will give you a work order number. No information is saved or orders submitted until you see the work order number.

20 Call Mailroom Operations at extension **2-2403** to pick up items and deliver them to the records center.

Visit the records center at records.ldschurch.org.



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