



Store it | Scan it | Convert it | Manage it

Storage Online User Guide (v2.0)

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A. Logging onto the system

The Store Online website has a URL of '<https://aso.archivems.co.uk/amstoreonline/logon.asp>'. Either point your browser directly at this link or follow the 'customer login' link from our main website at '<http://www.archivems.co.uk>'.

In the account number and username boxes, enter the information either as per your original application form or as created by your Storage Online administrator using the Store Online service.

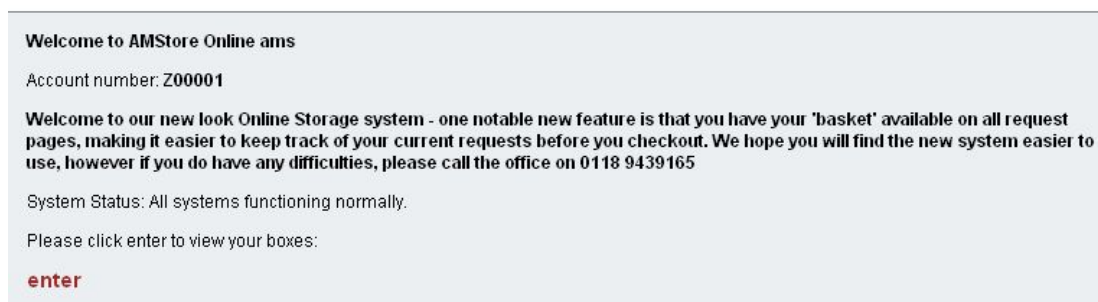


account number
username
password

In the password box, enter your password – please note that this is case sensitive.

 *Ensure that you don't have Caps Lock on unless your password is in uppercase!*

Click the Logon button and the Store Online system will validate your user details. Once validated you will see the Welcome screen showing any relevant account messages.

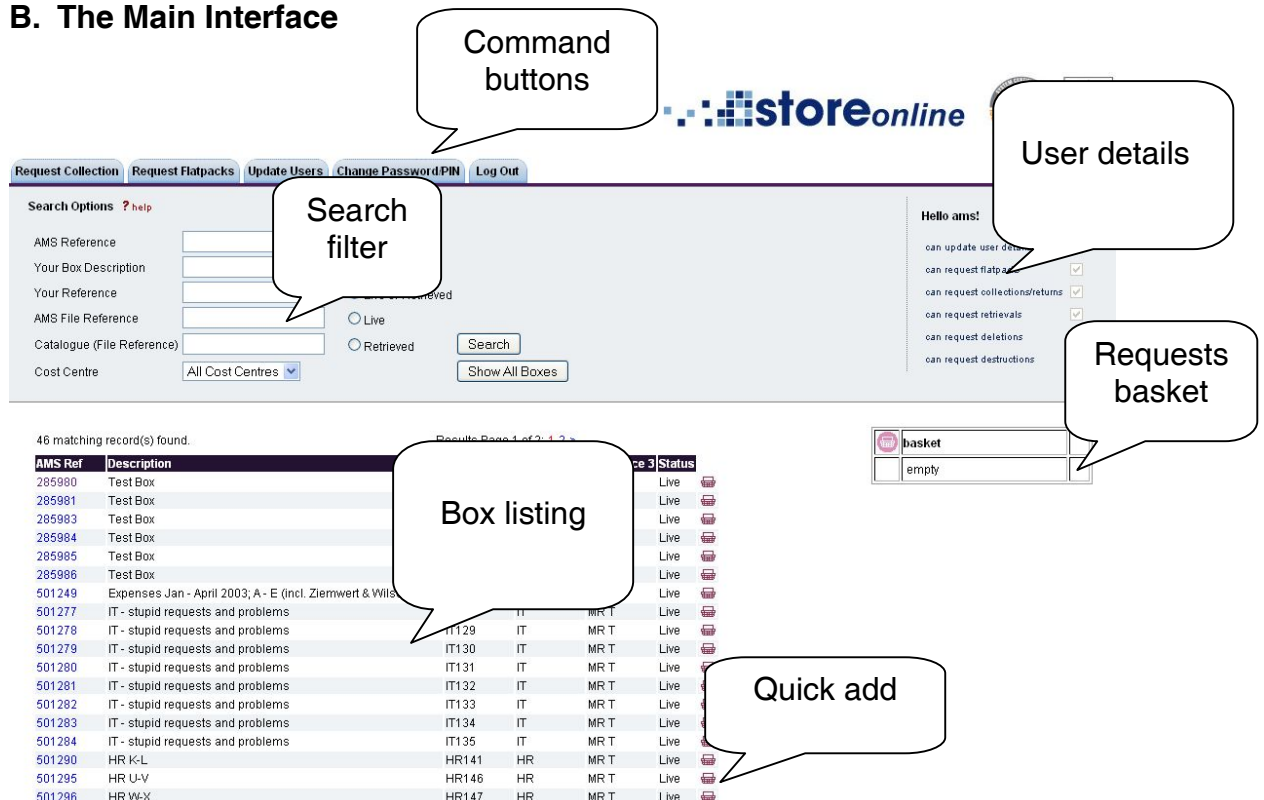


Welcome to AMStore Online ams
Account number: Z00001
Welcome to our new look Online Storage system - one notable new feature is that you have your 'basket' available on all request pages, making it easier to keep track of your current requests before you checkout. We hope you will find the new system easier to use, however if you do have any difficulties, please call the office on 0118 9439165
System Status: All systems functioning normally.
Please click enter to view your boxes:
enter

Click the '**enter**' link to enter the system.

If you do not know your login details you should check with your Storage Online administrator, or if you are the Storage Online administrator you can contact AMS Support Services by emailing support@archivems.co.uk or calling 0118 9431443 and selecting option 5 for technical support.

B. The Main Interface



The screenshot shows the main interface of the ams storeonline system. At the top, there are navigation buttons: Request Collection, Request Flatpaks, Update Users, Change Password/PIN, and Log Out. Below these are search options including AMS Reference, Your Box Description, Your Reference, AMS File Reference, Catalogue (File Reference), and Cost Centre. A search filter is highlighted with a callout. On the right, there is a 'Hello ams!' section with user details and a 'Requests basket' section. The main area displays a 'Box listing' table with columns for AMS Ref, Description, and Status. A 'Quick add' callout points to a button in the table.

AMS Ref	Description	Status
285980	Test Box	Live
285981	Test Box	Live
285983	Test Box	Live
285984	Test Box	Live
285985	Test Box	Live
285986	Test Box	Live
501249	Expenses Jan - April 2003; A - E (incl. Ziemwert & Wils	Live
501277	IT - stupid requests and problems	Live
501278	IT - stupid requests and problems	Live
501279	IT - stupid requests and problems	Live
501280	IT - stupid requests and problems	Live
501281	IT - stupid requests and problems	Live
501282	IT - stupid requests and problems	Live
501283	IT - stupid requests and problems	Live
501284	IT - stupid requests and problems	Live
501290	HR K-L	Live
501295	HR U-V	Live
501296	HR W-X	Live

User Details

Displayed here are your current logged-on account number and username, together with your account/user level for managing other users and boxes.

To change user details or add new users to your account, please refer to sections C and D below.

Command Buttons

These buttons allow you to request returns, flatpaks and collections, update users, change your password or PIN and log out.

Only buttons that you have permission to use will be displayed.

Search Filter

These options will help you to find a specific box or file by filtering the box list. For help on using these options, please refer to section E (Filtering the Box Listing).


Box Listing

This shows the complete list of your boxes in storage as defined by any filter options applied.

Requests Basket

Any requests made will be added to the on screen basket, allowing you to keep an eye on your current requests as you search for more boxes/files.

Quick Add

This basket icon  alongside the box listing allows you to add boxes to your basket without going into the box details. This icon is only available if you have permission to make box requests. If the box is greyed out, this means the box has been retrieved.

C. Security Levels

We offer 5 levels of security:

Level 0: Any person from your organisation is able to request any service. We will make every endeavour to ensure that the person making the request is a valid member of your organisation. If the person making the request is unfamiliar or the delivery address is unknown then we may ask for a fax or email confirmation of the request before processing.

Level 1: Any person from your organisation is able to make requests for flat-packs, collections of new boxes, retrievals and deletions. Destructions will only be allowed from persons authorised to do so by the admin contact.

Level 2: Any person from your organisation is able to make requests for flat-packs, collections of new boxes and retrievals. Deletions and destructions will only be allowed from persons authorised to do so by the admin contact.

Level 3: Any person from your organisation is able to make requests for flat-packs and collections of new boxes. Retrievals, deletions and destructions will only be allowed from persons authorised to do so by the admin contact.

Level 4: Full security – requests for any service will only be allowed from persons authorised to do so by the admin contact.

If you wish to change your current level of security please contact the Storage Services Team at retrievals@archivems.co.uk or **0118 943 9165**.

D. Modifying an Existing User

To modify an existing user:

Click the **Update Users** button on the main screen.

The **User Details** screen will be displayed:

account Number

Username	update users	request retrievals	request flatpicks	request collections/returns	request deletions	request destructions
<u>ams</u>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> (account default)	<input checked="" type="checkbox"/> (account default)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<u>ams2</u>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> (account default)	<input checked="" type="checkbox"/> (account default)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<u>ams3</u>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> (account default)	<input checked="" type="checkbox"/> (account default)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

to add a new user please enter a new username and click 'add user' below

Click on the username you wish to modify (underlined) and the **Username Properties** screen will be displayed:

Username (max 64 characters)

Password

Confirm Password

Pin

Confirm Pin

can update user details

can request retrievals

can request flatpicks (account default)

can request collections/returns (account default)

can request deletions

can request destructions

All Cost Centres
 Restricted

To modify details, make the changes as required and click on the **submit** button.

If you have more than one cost centre you can restrict users so that they can only see the records of certain cost centres by selecting the restricted radio button and then clicking '**change cost centres**'. A new window will pop up with a list of your cost centres and you can check/uncheck these to allow/disallow access. Once you have selected cost centres then you may close the window and '**submit**' the Username Properties screen.

To delete a username, click on the '**Delete User**' button.



*Ensure you do not delete your primary username!
If you do, please contact AMS IT Services at
support@archivems.co.uk to have it reinstated.*

Please be aware that you will not be able to change any permissions that are set at Account level. The account level will have been chosen when the account was initially set up.

E. Adding a New User

Follow the instructions in section C above to get to the **User Details** screen.

Simply type a new username into the text field and click the 'add user' button – this will redirect you to the **Username Properties** screen as described above. Enter the required details and click 'submit' to finish.



Please remember that passwords are case sensitive!

F. Changing your password or PIN

To change your password or PIN you need to click the **change password/pin button** on the **Main Interface**.

You will then be prompted to enter your new password/PIN and then confirm your new password/PIN.

change password

new password

please confirm new password

change password

change pin

new pin

please confirm new pin

change pin

Please remember that your password is case sensitive.

G. Filtering the Box Listing

When you first access the system, all live or retrieved boxes are shown in the Box Listing.

To help you to locate a required box or file, you can filter the Box Listing by entering a specific AMS Box or File Reference, searching for your box description or reference, searching for your catalogued file reference or selecting a status (Live, Retrieved, or Live or Retrieved).



AMS Reference is our box reference, usually a six digit number, e.g. 123456

Your Box Description is the description or name of the box you have given us.

Your Reference is any other reference you may have given us for the box alongside Your Box **Description**.

AMS File Reference is our file reference, this usually has six digits and is prefixed with an F, e.g. F123456. The F may be omitted when searching.

Catalogue (File Reference) is any indexing information or cataloguing regarding files, e.g. names, dates or addresses.



Please note that you will only be able to search for individual files if you have used AMS Cataloguing services.

Cost Centre – if you have more than one cost centre you will also be able to filter by cost centre by using the drop down menu.

When specifying text to be searched for in the reference fields there is no need for any 'wildcard' characters:





Searching for 'Leave' would find boxes with references of 'Leavers Files' and 'Forms for Leavers 1999'.

Once you have selected your filtering criteria, click the **'search'** button and the **Box Listing** will be regenerated to reflect this filtering. (Unless you have searched for an **AMS File Reference** in which case you should be taken directly to the **File Properties** screen.)

If you are searching under **Catalogue (File Reference)** then all boxes containing files with the relevant reference will be listed:

4 matching record(s) found.

Results Page 1 of 1: 1




AMS Ref	Description	Reference 1	Reference 2	Reference 3	Status
285980	Test Box	1			Live 
285981	Test Box	2			Retrieved 
501249	Expenses Jan - April 2003; A - E (incl. Ziemwert & Wilson Bros)	38/EXP/6	Finance	hhhh	Retrieved 
502257	Sales - leads	S108	Sales	M R T	Live 

Select a box to view its contents; once in the file listing you will see that matching files are highlighted with a red exclamation mark. You can also search for the file by clicking **ctrl+f**:

[Back to search results](#)

[Request Retrieval](#) | [Request Deletion](#)

AMS Reference	<input type="text" value="285980"/>
Description	<input type="text" value="Test Box"/>
Reference 1	<input type="text" value="1"/>
Reference 2	<input type="text"/>
Reference 3	<input type="text"/>
Status	<input type="text" value="Live"/>

Reference	Pickford Ref No	Contents	Destruction Date	Status	
 F507734	12345	General files	Z00001	Live	
 F507735	shgsdhdhdhdf	fjaskdopr3	Z00001	Live	
 F504808	ddwdw	dwada	dawda	Z00001	Live

H. Using the Box Listing

Only so many boxes can be displayed on the screen at any one time.

This means that the entire Box Listing may be spread over several pages and the page selector will be displayed at the top of the screen:

Results Page 1 of 27: [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) [>](#) [>>](#)


To view the contents of any page, simply click on the required page number, the single chevron to go to the next page, or the double chevron to go to the last page.

To view the properties of a box or to view the cataloguing (if any), click on the required **AMS Ref** number of the box.

This will display the **Box Properties** screen:

[Back to search results](#) [Request Retrieval](#) | [Request Deletion](#)


AMS Reference	285983
Description	Test Box
Reference 1	4
Reference 2	
Reference 3	
Status	Live

Reference	Pickford Ref No	Contents	Destruction Date	Status
 F415029	ABCDEFGH			Live

To view the properties of a file (catalogued contents of a box), click on the File Icon, this will display the **File Properties** screen:

[Back to box](#) [Retrieve file](#)

AMS Reference	285983
Description	Test Box
Reference 1	4
Reference 2	
Reference 3	
Status	Live


Reference	Pickford Ref No	Contents	Destruction Date	Status
 F415029	ABCDEFGH			Live

I. Requesting a Box Retrieval, Deletion or Destruction

To request a **Box Retrieval** you will first need to find the required box in the **Box Listing**. Use the filter options as described in section F (if you need to) to help you do this.








Note – you will only be able to do the following if you have permission to make box/file requests.

Once you have found the required box you have two options:

- Add the box to the basket by using the ‘quick add’ basket icon  at the end of the row next to the status:

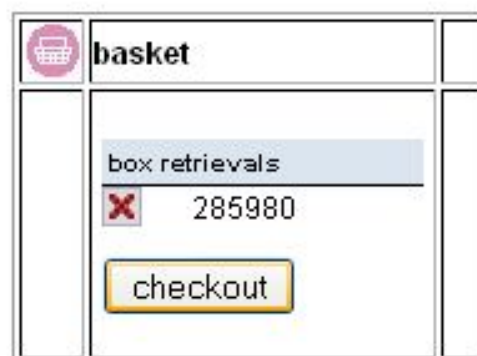
46 matching record(s) found.

Results Page 1 of 2: [1](#) [2](#) >

AMS Ref	Description	Reference 1	Reference 2	Reference 3	Status	
285980	Test Box	1			Live	
285981	Test Box	2			Live	
285983	Test Box	4			Live	
285984	Test Box	5			Live	
285985	Test Box	6			Live	
285986	Test Box	7			Live	
501249	Expenses Jan - April 2003; A - E (incl. Ziemwert & Wilson Bros)	38/EXP/6	Finance	hhhh	Live	

- To check the contents of the box before you request it, click on the AMS Ref number to open the Box Properties Screen (see section G above.)

If you are able to request box retrievals, click on the **Request Retrieval** link to add this box to your basket:



If you require an urgent service you will be able to add this at the checkout stage. Please refer to section K (**Checkout**) for managing and committing the basket for request.



Deletions and Destructions are handled in the same manner by clicking **'Request Deletion'** from the Box Properties Screen if you have permission.

J. Requesting a File Retrieval

To request a **File Retrieval** you will first need to find the required File or the box that it's in by using the search filter options as described in section E.

When you have located the correct file you can simply select **Retrieve File** from the File Properties screen, this will add the file to your requests basket:

[Back to box](#) [Retrieve file](#)

AMS Reference	285983
Description	Test Box
Reference 1	4
Reference 2	
Reference 3	
Status	Live

Reference	Pickford Ref No	Contents	Destruction Date	Status
F415029	ABCDEFGH			Live

If you require an urgent service you will be able to add this at the checkout stage. Please refer to section J (**Checkout**) for managing and committing the basket for request.

K. Checkout

The checkout process is split into two separate pages. At the first stage you will check your requests and you have the opportunity to select an urgent service for any file/box retrievals. To select an urgent retrieval simply tick the urgent box for the relevant box/file:

[back to box listing](#)

Cost Centre: Test

requests for box retrievals

AMS Reference	Description	Reference 1	Reference 2	Reference 3	Urgent	Delete
285981	Test Box	2			<input checked="" type="checkbox"/>	
285983	Test Box	4			<input type="checkbox"/>	

Urgent
checkbox

requests for file retrievals

Box Reference	File Reference	Cataloguing	Reference 1	Reference 1	Urgent	Delete
285980	F507734	12345	General files		<input type="checkbox"/>	

requests for collections

Type	Quantity	Delete
Return Boxes to Archive	5	
Collect New Boxes for Archive	11	

requests for flatpacs and tubes

Type	Quantity	Delete
AMS Large Boxes	20	

[confirm delivery details](#)

To Delete a Request:

Simply click the delete button  next to the item you wish to delete.

When you are happy with your request list click the **confirm delivery details** button below the request list.

The following page will prompt you to confirm your delivery details including a PO reference and any comments you may have:

Please confirm the **delivery address**

Arrange for collection from AMS
 Please deliver to the following address

Contact Name	Plob
Address Line 1	U3 Sterling Way
Address Line 2	Norcot Road
Address Line 3	
Town	Reading
County	Berkshire
Postcode	RG30 6HX

requests for box retrievals					
AMS Reference	Description	Reference 1	Reference 2	Reference 3	Urgent
285981	Test Box	2			<input checked="" type="checkbox"/>
285983	Test Box	4			<input type="checkbox"/>

requests for file retrievals					
Box Reference	File Reference	Cataloguing	Reference 1	Reference 1	Urgent
285980	F507734	12345	General files		<input type="checkbox"/>

requests for collections	
Type	Quantity
Return Boxes to Archive	5
Collect New Boxes for Archive	11

requests for flatpacks and tubes	
Type	Quantity
AMS Large Boxes	20

PO Reference

Comments

If you wish to use your own transportation please select the **Arrange for collection from AMS** radio button.

The delivery address shown will be the default delivery address used for your account. To view other addresses available please select the **change address** button.

If necessary you may also free type your address details over the details shown – please note that the fields will be disabled if you have selected **Arrange for collection from AMS**.

If we have a default **PO Reference** for you then this may be pre-filled in the text box. If you use a new **PO Reference** for each request then you will not be able to proceed without entering the new **PO Reference** in the relevant field.

The **Comments** section is optional and for any additional information that you think we may require. This could be additional delivery or collection instructions.

When you are ready to complete your request click the **confirm order** button.

You may have to wait a short time whilst your order is being processed; when the order has been received the confirmation screen will be displayed with your request number:



[Request Collection](#) [Request Flatpacks](#) [Update Users](#) [Change Password/PIN](#) [Reports](#) [Log Out](#)

Thank you for your request!

This will be dealt with as soon as possible by our Storage Services team.

Should you have any queries please call 0118 943 9165 or email retrievals@archivems.co.uk quoting order number **56033**

[Click here to go back to your box listing](#)

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