

grace:web

User Guide

Version 1.3

Powered by



grace:
Always more.

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Fundamentals

To use graceWeb, proceed to <https://orders.graceclients.com.au>. Depending on which Grace branch your account is based, you will need to select the correct Record Center from the drop down list:

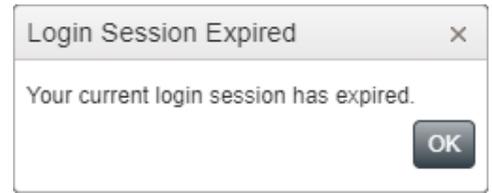
Record Center	Branches
CW	Orange branch only
NSW/ACT/WA	All NSW (<i>except Orange</i>), ACT and WA branches
QLD	All QLD branches
VIC/SA/NT/TAS	All VIC/SA/NT and TAS branches

The screenshot shows a login form titled "Login Information". It contains a dropdown menu for "Record Centers" with "NSW/ACT/WA" selected. Below it are input fields for "User Name" and "Password", and a "Login" button.

Ensure the correct Record Center is chosen, and enter in your username and password.

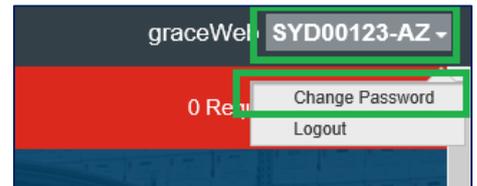
These are both **case-sensitive**.

graceWeb comes with a session timeout feature, which will automatically log off your session after a set period of inactivity. This is currently set to **10** minutes. If this time has elapsed, and you attempt to submit a page or use another graceWeb feature – The following message will appear. You will need to press "OK" and login again to continue using graceWeb.



Change Password

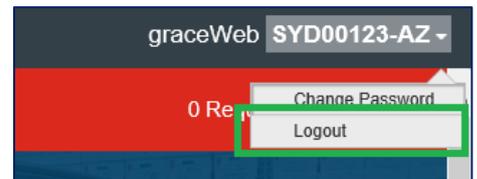
If you wish to change your password for graceWeb, click on your username on the top right of the window, and select "Change Password".



It will then ask you to enter in your current password, and then enter your new password twice (Second is for verification the new password was entered correctly). Press "Change" to save this password change.

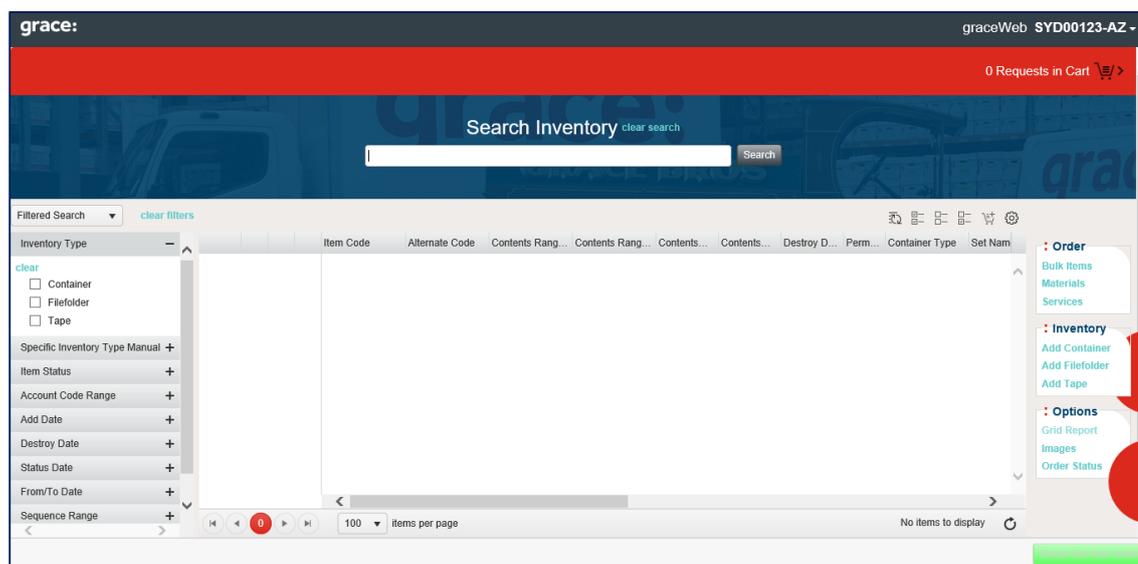
Log Off

To log off your session, click on your username on the top right of the window, and select "Logout":



Grid Design

Once you login to graceWeb, you will arrive at the Search Inventory Grid.



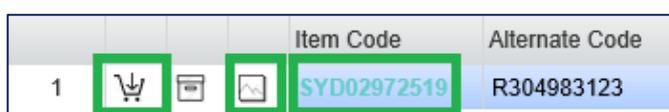
At the bottom of the grid, it will list the current page number; and allow you to move through the grid pages.



You also can set how many items you wish to view per page, and it gives you the total number of items over all pages.



By default, all the results in the grid are selected. To un-select a line, you can left-click anywhere along the line with the exception of these three columns:

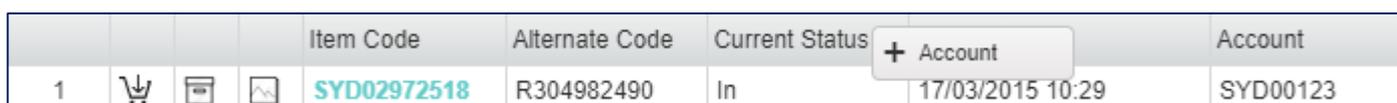


Clicking on these buttons will perform the following actions:

	Add the item to the cart. It will ask you to select which service to use: (Delivery/Pickup/Scan-On-Demand).
	View any digital images for that item.
SYD02972519	Allow you to view and edit the item data.

Moving Grid Columns

graceWeb allows you to move columns around into different positions. Simply left click and hold your mouse on a column header and use your mouse to drag the column to the new position.

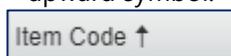


When you move the column, the column name will appear with a plus symbol. When you release your mouse, it will move the column.

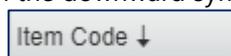
Sorting Grid Columns

To sort the data within the grid, you can click on the column header and this will enable the sorting. By default, the items appear in the order they were searched.

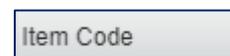
When you click on the column header, it will sort in **ascending** order. This is denoted with the upward symbol.



If you click the column header again, it will then sort the data in **descending** order, which is denoted with the downward symbol.



Click the column header once more to revert back to the default order for that column.



Grid Line Options

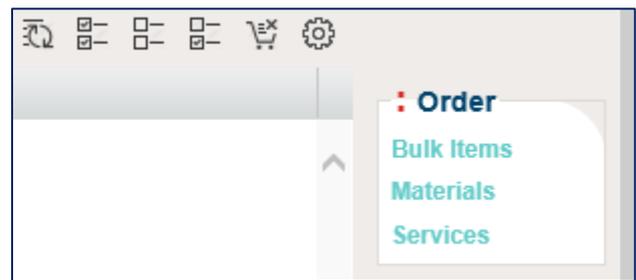
You can right click any of the grid lines to display the options menu.

	Item Code	Alternate Code	Add Date Time ↑	Destroy D...	Current Status	Status Date Time
2057	SYD2527042	65937			In	16/03/2015 06:16
2058	SYD2527041	65932			In	16/03/2015 06:16
2059	SYD2527040	65923			In	16/03/2015 06:16
2060	SYD2527039	65902			In	16/03/2015 06:16
2061	SYD02974398	B21253-13			In	20/03/2015 08:09
2062	SYD2526272	20494			In	24/03/2015 10:29
2063	SYD02998836				In	19/04/2015 18:06
2064	SYD02998837				In	19/04/2015 18:06
2065	SYD2527970	135627			In	19/04/2015 18:06
2066	SYD2526469	31638			In	19/04/2015 18:06
2067	SYD02998838				In	19/04/2015 18:06
2068	SYD02998839				In	19/04/2015 18:06
2069	SYD02998840				In	19/04/2015 18:06
2070	SYD02998841				In	19/04/2015 18:06
2071	SYD02998843		19/04/2015 18:34		In	19/04/2015 18:34

Grid Icons

Above the grid table to the right are the grid icons. These allow you to select or deselect all the grid items, refresh all the results or add all the selected lines to the cart.

	Reload Results
	Deselect All Lines
	Select All Lines
	Add Selected Items to Cart



Searching and Filtering Data

There are many ways to locate items and add those results into the grid. You can perform a standard text search, use the filtering; or both in combination. You can also use the advanced search, that is designed for those searches that a text search and/or filter cannot perform. Those advanced results can also be filtered.

Advanced Search

Advanced Search ▾

Quick Query

Active Boxes (Container) ▾

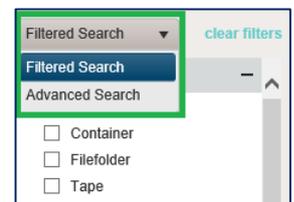
Description

View all active cartons (In storage with us or offsite with you).

Clear All Items on Grid

Search

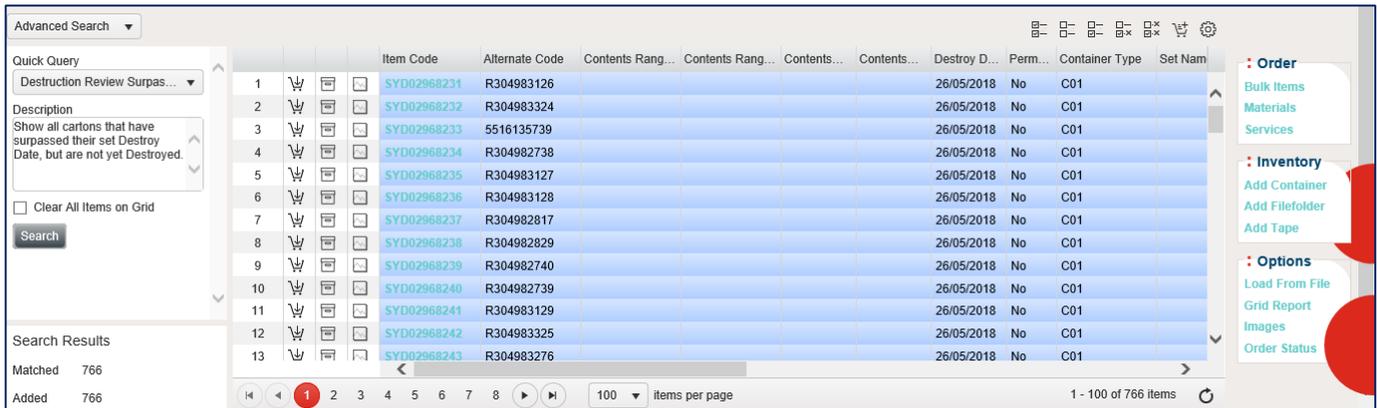
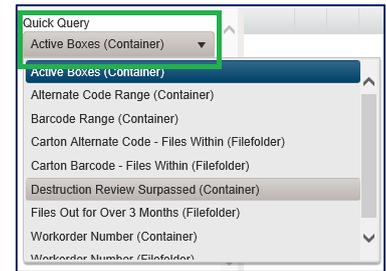
The advanced search will provide you with a list of pre-set searches to simplify locating items. On the left side of the Inventory grid you will see the filters. Above the filters is a drop-down menu named "Filtered Search". When you click on this, you will see "Advanced Search".



When you select "Advanced Search", you will see that the filters will disappear and you will be left with a choice of advanced searches.

If you click on the "Quick Query" drop down, you will see a list of the quick queries.

In this example, we will select the quick query "Destruction Review Surpassed". This will show all cartons that are not Destroyed, but have past their Destroy Date. Once we have selected that quick query and pressed "Search", the results will appear in the grid:



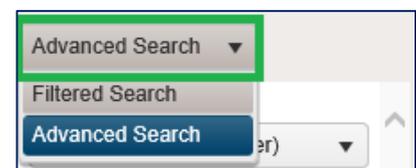
The Advanced Search allows us to run another quick query, and we can choose to add these new results onto our existing results. We will choose "Active Boxes" and keep the option for "Clear All Items on Grid" unticked, and then press "Search":

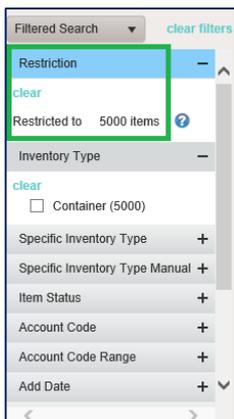


You can see that this second advanced search has added an additional 3,470 results to the grid, but it matched 4,235. The reason for the difference is due to some of the items from the first search are also Active Boxes.

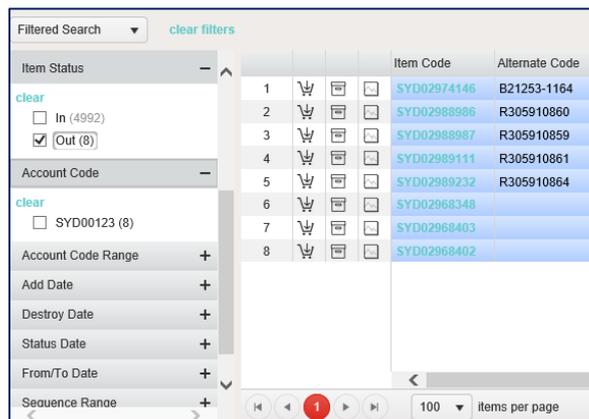
Advanced Filtering

When you have used an advanced search to find results, you can click on the drop-down menu named "Advanced Search" and change it to "Filtered Search". You will find that the data from the advanced search will remain in the grid, and the filters you apply will be restricted to the results.





You can apply filters and the results will reduce to only match those from the results from the advanced searches and the chosen filters.



Standard Search

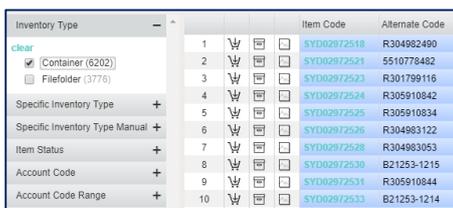
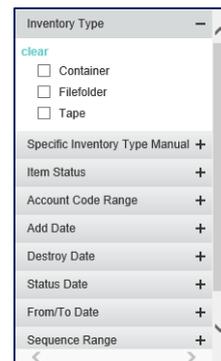
Above the Search Inventory grid, you will see the Search Inventory text search field. This is where you can type in data and once you click search, graceWeb will search all text-based fields for all items for any matches. Those items that are found will be shown in the grid below. Text Search cannot be used to locate items with a certain add/status/destroy date for example. This is where you would use Filtering.



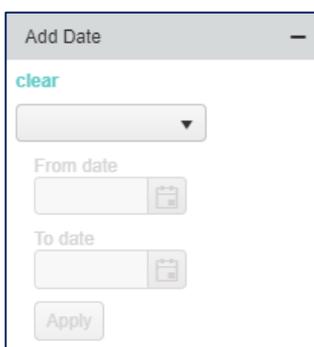
Standard Filtering

Filtering can be used to display items without the need to type anything into the search inventory field, or the data is contained in a non-text field (Such as date fields). Examples of where the filtering is handy include, you may wish to view all containers only, or all items added within a certain date range, The filtering feature makes this quick and easy.

On the far left of the search inventory screen is the search filter options. To view all the containers you have access to, simply tick the "Container" within the Inventory Type menu:

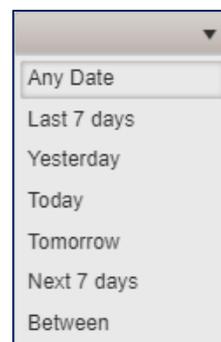


This will display every container. From this you can use additional filters to further reduce the lines to find what you are looking for.



To display the containers added within the date range of June 2019, go down the filter list to "Add Date". Using the drop down menu, you can select a date range (Between), Today, Tomorrow, etc. For the date range, select "Between" and enter in the From date and To date.

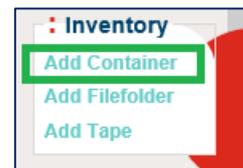
Then press "Apply" for the search results to be filtered to only show those containers added within this date range.



Adding and Editing Items

Add Item

graceWeb allows you to add a new container, filefolder or tape to our database; before it has been received at Grace. To add a new item, refer to the "Inventory" menu on the far right of the window. Then select the type of item you wish to add.



For this example, we will add a new container. First step is to select the account for this new item.

You can choose the account from a drop down list. If you click the list button next to the Level 1 field, it will show all the Level 1 account codes you have access to. To choose an account, right-click the line and click OK.

Account Code	Account Description
1 SYD00123	Sample Company P/L

You can also type in the account number if you know it. As you start typing, the field will start to auto-populate. If the account that shows is the one you want, simply click that option.

The next step is to enter in the barcode of the carton:

Barcode *

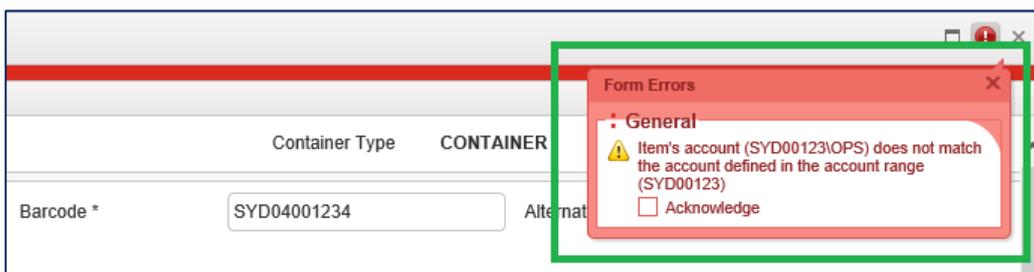
If there is a problem with the data you have entered in any of the fields, the "Add" and "Add to Cart" buttons will automatically disable:



Depending on the type of problem, you will see this warning icon appear on the top right of the Add Container window:



When you left-click the warning icon, it will detail the problem:

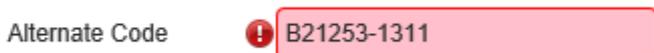


In this situation, the barcode number used was originally ordered and allocated for another account. If you are aware of this, but still wish to use this carton barcode number, you can left-click the "Acknowledge" box and close that message.

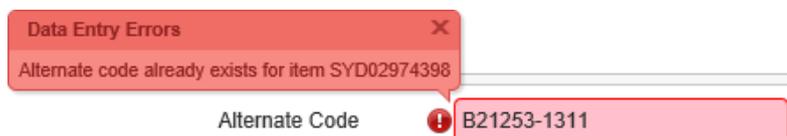
This will re-enable the Add buttons, as there is no longer a problem.



Another type of problem is when for example you try to use an Alternate Code for a container that has already been given to another carton. When you type in the alternate code and go on to the next field, the Alternate Code field will change to red and the warning icon will appear next to the field:



As mentioned earlier, whilst there is a problem, you cannot click the "Add" or "Add to Cart" buttons. When we click on the warning icon, it displays the problem:



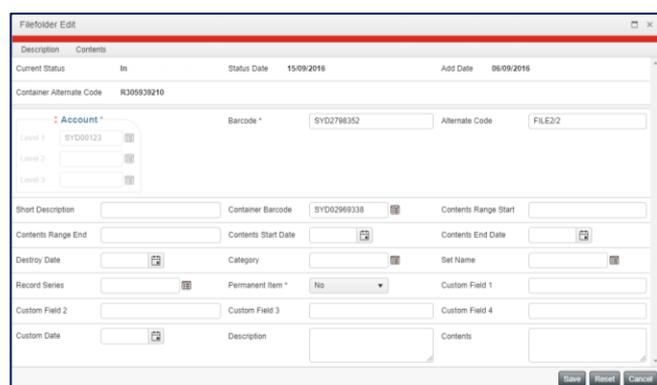
Another carton, namely "SYD02974398" has this Alternate Code. We can only add this container when the Alternate Code does not conflict with the other carton.

Once you have entered in all the other relevant fields, click on "Add" to add this container into the database. If you wish to add this to the system and also add this straight to the cart for collection, click "Add to Cart".



Edit Item

To edit the information within an item, firstly perform your search for the item. Once the item appears in the grid, click on the barcode number to view the edit window for that item.



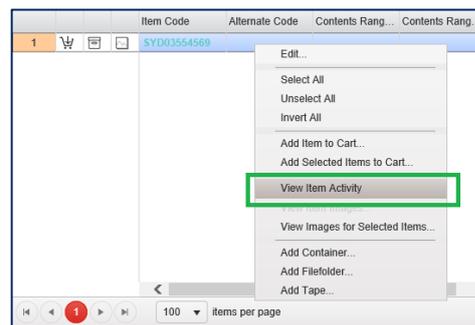
When the edit window appears, you have the ability to make changes to the information. If you attempt to change data that may cause a problem, such as changing the Alternate Code to something that another item already has, you will see the same warning icons as mentioned in the "Add Item" section of this guide.

Once you have made all the changes required, and no further error messages are active, you can then click "Save" to close the edit screen, with the changes applied.

View Item Activity

You can view the activity of an item using graceWeb. Once the item has been found and is in the inventory grid, right-click the line to show the menu. Then left-click on "View Item Activity".

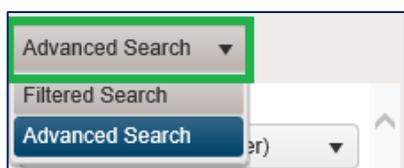
Date/Time	Activity	Workorder Number	Workorder Create Date/Time	Workorder Required By D...	Requestor
01/21/2019 11:25:35AM	Delivery	01316489	01/21/2019 11:25:25AM	01/22/2019 12:00:00PM	P. Sherman
07/31/2017 01:13:20PM	Add				
07/31/2017 08:49:34AM	Pickup	01211828	07/28/2017 10:44:15AM	07/31/2017 05:00:00PM	



This will display all the activity relevant to the item, from the registration, collection and deliveries. It will show the date/time along with Workorder numbers, Requestor names; and the associated Web order details (Tracking/Batch numbers).

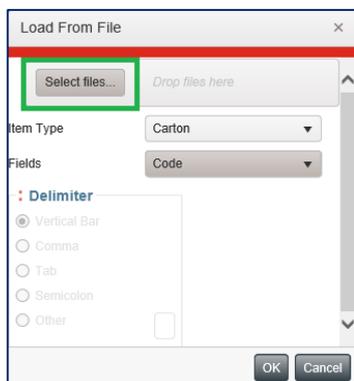
Load List from File

If you have a saved list of barcode numbers or Alternate Codes of your items, you can load that list into graceWeb, and it will locate and display those items for you.



You need to ensure that you are in the Inventory grid, and have chosen the "Advanced Search" option above the filters on the left side of the screen. You **cannot** access the Load List from File using the "Filtered Search".

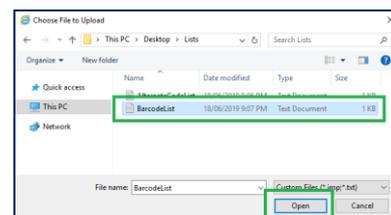
Then on the right side in the Options menu, click "Load From File". This will allow you to select the type of items that have the barcode/alternate codes you wish to load.

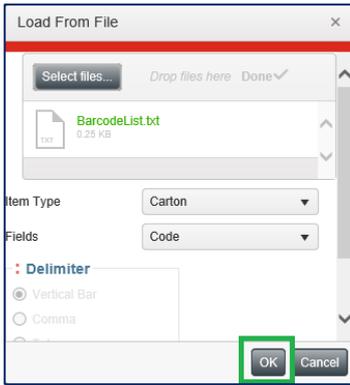


For this example, we will attempt to load carton barcode numbers, so we will change the Item Type to "Carton". We will also select the field option of "Code", as we have carton barcode numbers.

Once you have chosen those options, click on "Select files..." and locate the file that contains the numbers. Once you have loaded the text file, click on the OK button.

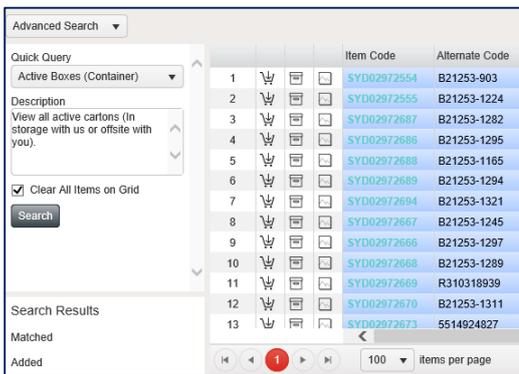
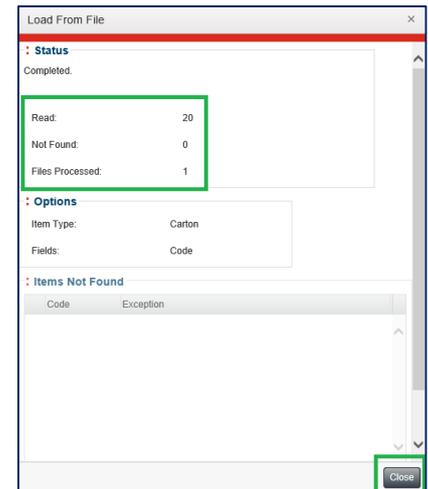
Only plain text (.txt) files are supported





graceWeb will attempt to locate a match to the carton barcodes and load them into the inventory grid. You will see this Status window once the whole list has been loaded.

Click "Close" to view the Inventory grid:



Now all the cartons from that saved text file are in the inventory grid, you can view all their information quickly and easily, and can also add them all to the cart for ordering at a click of the mouse.

(Refer to **Search and Order – Multiple Items**).

Grid Report

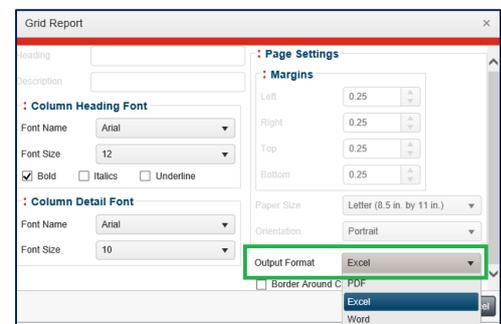
graceWeb allows you to export the data that appears within the inventory and order status grids into an Excel, Word or PDF file.

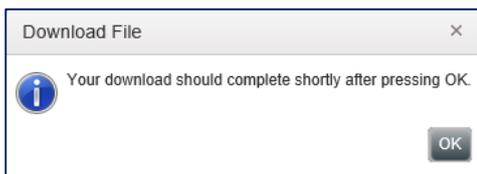
You need to ensure that all the results on the grid are selected (Shaded in Blue). Click on the "Select All Lines" button on the top right corner of the grid to select all the results. On the right side of the screen in the Options menu, you will see the "Grid Report" option.



From this window, you can select the output format you wish to use, such as Excel, Word or PDF. If you choose PDF or Word, it will allow you to adjust the page settings. However, if you choose Excel, these settings are disabled.

You have the ability to choose the font for the column headers from the grid and the font for the actual item data. You can also choose to have a border around all the cells, and have every second row shaded in the report. Once you have made your choices, press "Generate".





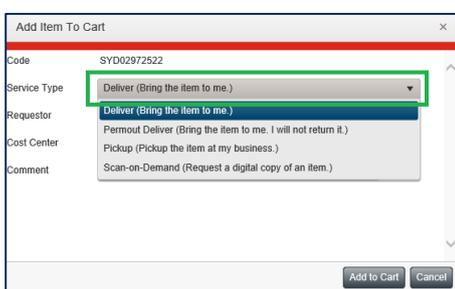
graceWeb will inform you that the download will commence once you press "OK". Depending on your browser, it will either automatically download and open, or ask for confirmation as to what action is required. Depending on the format that you chose, open the file to view the outputted data.

Ordering

Search and Order – One Item

If you wish to request the delivery of a container or the collection of an item by its barcode number, you firstly perform a search and/or filter of the item/s. When you have the items in the grid, simply click the "Add Item to Cart" button:

				Item Code	Alternate Code
1				SYD02972519	R304983123
2				SYD02972518	R304982490
3				SYD02972521	5510778482
4				SYD02972523	R301799116
5				SYD02972522	R305910831
6				SYD02972524	R305910842



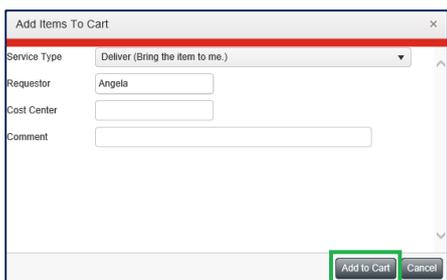
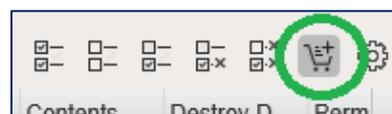
It will then show a window to enter in:

- The Requestor name
- Delivered/Collected/Scan-On-Demand
- Any additional comments about this order.

Once you have entered and chosen the right information, click on "Add to Cart".

Search and Order – Multiple Items

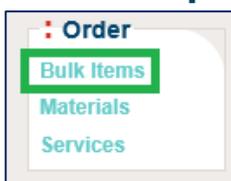
If you have multiple items that you wish to add to the cart that are shown in the inventory grid, you can click "Add Selected Items to Cart" button. This is located on the top right of the grid.



It will ask you for the service type and Requestor name. If you have selected items that are In and Out, and request a delivery, graceWeb will allow the Out items to be placed into the cart.

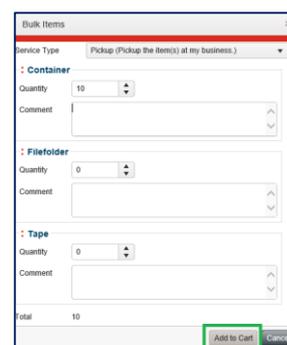
When you attempt to checkout the order, it will recheck the item status, to see whether the item has been returned (In) and can be delivered back.

Bulk Pickup



On the far right of the window in the Order menu, click on "Bulk Items". You can enter in the quantity of containers, files or tapes that you wish to be collected by Grace.

Once you have made your choices, you press "Add to Cart".



Merchandise

In the Order menu, click on "Materials".

It will allow you to select the type of merchandise (Material) that you wish to order. The quantity is each and not per pack or roll. Contact your local branch for clarification to find out pack and roll quantities. Once you have made your choices, and entered in the Requestor name, press "Add to Cart".

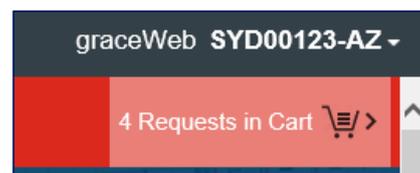
Other Services

In the Order menu, click on "Services".

It will allow you to select the service type that you wish to order, such as destruction bins. Once you have made your choices, and entered in the Requestor name, press "Add to Cart".

Check Out

Once you have placed your orders into the cart, you can then checkout the orders. Click on the Cart button on the top right of the window. It will also give you a count as to the number of orders awaiting checkout. All the cart items are **selected** by default.



Track#	Service Type	Details	Quan.	Requestor	Cost Center	Customer Com.	Add Date
1	X	205002 Pickup Carton	10	G. Sullivan			15/06/2019 9:22 PM
2	X	205003 Sell C1 Carton	25	G. Sullivan			15/06/2019 9:23 PM
3	X	205004 Other Services Delivery of Bin	2	G. Sullivan			15/06/2019 9:23 PM
4	X	205005 Pathway Carton 711708075022 (R3350-0801)	1	Elizabeth R			15/06/2019 9:25 PM

You can deselect the items you do not wish to checkout by left clicking anywhere on the line, with the following exceptions. There are two buttons that will perform the following actions:

- Delete Order
- Edit Order

If you need to delete more than one order from the cart, ensure they are all selected and click the "Delete Selected Requests" button located on the top right of the cart grid. If you have placed the wrong item/s in the cart (For example selected a collection instead of a delivery), you will need to delete the request/s and place it to the cart again.

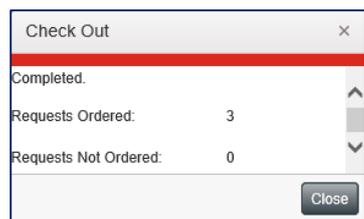
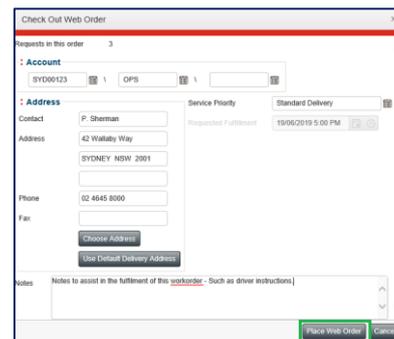


Once you are happy with the selected cart items, you press the "Check Out Web Order" button on the far bottom right of the window.

You will need to ensure that the correct account number is chosen, so the workorder is created and invoiced to the correct account. Ensure the service address is correct, as that is where the driver will be going to deliver or collect the items.

If you are requesting an Urgent or Priority **delivery** of an item, you can change the service priority to the desired choice.

The requested fulfilment date/time is automatically calculated based on our standard timeframes, and your account may have agreed timeframes which are outside this. Contact your local branch for clarification if required. Enter into the notes field any information that may assist the delivery driver in getting to your address or any other helpful information.



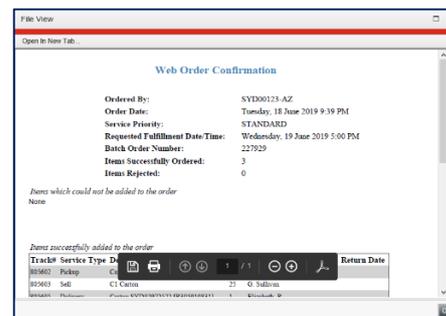
Once the information has been entered, click "Place Web Order".

As the order is processed, it will inform you if there are any problems.

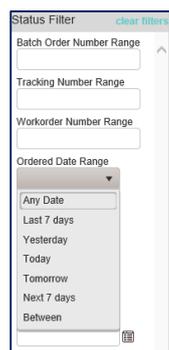
If any orders cannot be processed, it will give you a tally and also further information in the order confirmation. Click "Close" to proceed to the confirmation.

The order confirmation will provide you with the batch order number and the reasons why certain orders could not be processed. You can save this PDF, print it, or press "OK" to close the confirmation.

It will return you to the Cart grid, where the items that were successfully checked out will no longer appear; and any cart items that had a problem would remain in the cart.



Order History



In the Options menu, click on "Order Status".

This will allow you to enter in the information about the order you are looking into. You can enter in the batch or tracking number, workorder number range or a date range. If we enter for example today's date, it will list all the orders which were checked out today:



	Batch...	Track...	Service Type	Details	Quan...	Status	Status Date	Requestor
1	227929	805602	Pickup	Carton	10.00	Workorder	18/06/2019	
2	227929	805603	Sell	C1 Carton	25.00	Workorder	18/06/2019	G. Sullivan
3	227927	805581	Delivery	Carton SYD02...	1.00	Workorder	18/06/2019	
4	227929	805605	Delivery	Carton SYD02...	1.00	Workorder	18/06/2019	Elizabeth. R

It will also provide you with the current status of each order, and if you click on the "View Order Status" button , it will provide you with all the information about this order, and any comments from Grace.

Imaging Capability

Customers can request an item in storage to be imaged by our scanning team and made available for download via graceWeb. You can also view all images for all items which have been previously imaged.

View Images

In the Search Inventory grid, there is an icon that indicates whether an image exists for that item or if none exists, you will need to request for imaging.

			Item Code
1	📄	📄	IMGTEST001
2	📄	📄	IMGTEST002
3	📄	📄	IMGTEST003
4	📄	📄	IMGTEST004
5	📄	📄	SYD2854666
6	📄	📄	SYD2854802
7	📄	📄	SYD2772076
8	📄	📄	SYD3182053
9	📄	📄	SYD3062714
10	📄	📄	SYD2987203
11	📄	📄	SYD2987204
12	📄	📄	SYD2987205
13	📄	📄	SYD2987206



No images exist for this item

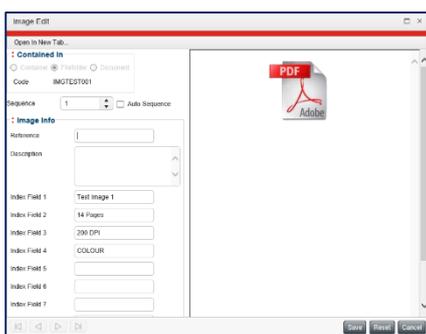


Images exist for this item

To display the images for the item, click on the icon.

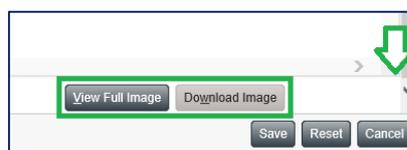
Each line represents a separate image for this item. To view the image file through graceWeb, click on the icon circled in green .

Images for Filefolder IMGTEST004 <small>clear search</small>							
Type text here to search images <input type="text"/> <input type="button" value="Search"/>							
	Document Code	Reference	Description	Add Date	Image Size	Image Type	Sequence
1				1/11/2016	12681883	PDF	1



All the fields on the left side of the Image Edit window will contain any indexed information about the image, if requested.

If you scroll down the window, you will find these two buttons:



You can click on "View Full Image" to preview the imaged file within that window with the PDF icon, or click on "Download Image" to download the image file onto your computer.

Order Images

If you wish to request an item to be imaged, the process is similar to requesting the delivery of an item.

				Item Code
1	🛒	📄	📄	SYD2778910

Firstly, you locate the item in the inventory grid and add the item to the cart. When you are asked to choose the Service Type for this item, click on the drop down and select:

"Scan-On-Demand (Request a digital copy of an item.)"

You will then be required to enter in the name of the requestor of this image and any comments that are relevant to this order.

Once you have entered in all the relevant information, click on "Add to Cart". You then checkout the order from your cart as normal.

Add Item To Cart

Code: SYD2778910

Service Type: **Scan-on-Demand (Request a digital copy of an item.)**

Requestor: Deliver (Bring the item to me.)

Requestor: Permut Deliver (Bring the item to me. I will not return it.)

Cost Center: **Permut (Pickup the item at my business.)**

Comment: **Scan-on-Demand (Request a digital copy of an item.)**

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