

# **SAFE Records**

**QUICK START GUIDE**



**timg**

**THE INFORMATION MANAGEMENT GROUP**

# Contents

## SAFE Records

Login.....	3
Creating a New Box .....	4
Creating a New File .....	5
Lodgements of New Items .....	7
Lodgement of a Return .....	8
Retrievals.....	9
Manage .....	10
Destruction of Boxes .....	11
In-Progress Menu .....	12
Navigation Guide.....	13
Frequently Asked Questions (FAQs) .....	14
TIMG Records Management Contact .....	15

# Login

## SAFE Records: Document storage and archiving at your fingertips!

TIMG offers a purpose built, online media management platform (SAFE Records) that is provided to TIMG customers at no cost. Unlike software utilised by other records or media management companies, SAFE is specifically developed for TIMG's requirements and not just simply an adapted stock management program. Available to all of our customers via a secure 128 bit web portal connection, this provides the most comprehensive and efficient means to accurately manage your company's confidential media.

## LOG-IN

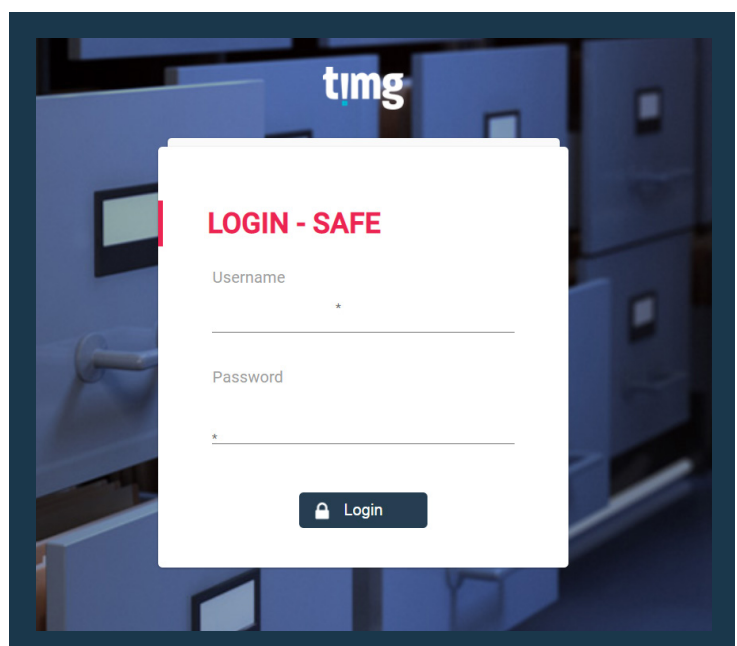
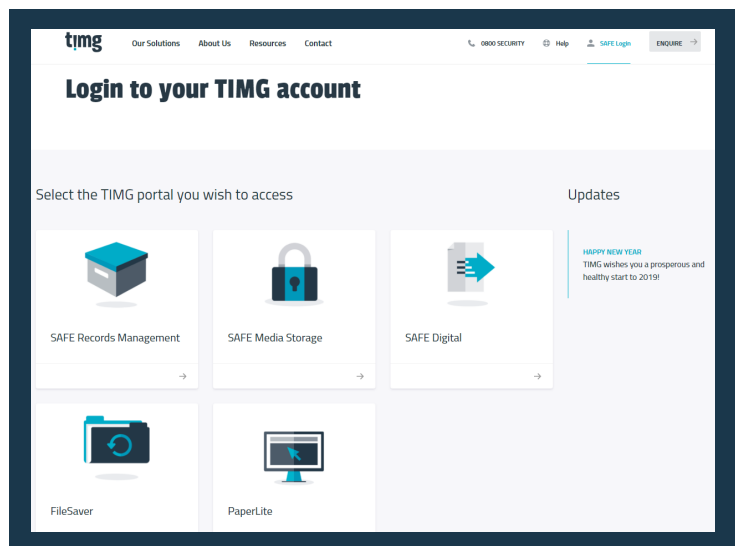
- Web Address: <http://timg.co.nz>
- In the top right hand corner, click "SAFE Login".
- Select a service you would like to log-in to. E.g. SAFE Records Management
- Add Username and Password to relevant fields.
- Click Login.

0800 SECURITY

Help

SAFE Login

ENQUIRE →



## ORDERING CONSUMABLES

- On the SAFE home page, CLICK on **Buy** tab.
- Add quantity to the required fields.
- Select the Correct Client Code, located to the **left** (picture below).
- Check delivery address, located to the **left** (picture below)
- CLICK Submit



### Delivery Details

ClientCode:

ZZZ - OSS TRAINING ACCOUNT

Requestor:

TRAINING, TEST - 116631

Name:

TEST TRAINING

Address:

do not send TRAINING ONLY

AUCKLAND

NEW ZEALAND

New Zealand

Your Reference:

Instructions:

Submit ▶

	<div>POL25</div> <div>POLICY BOXES [BUNDLE OF 25] Length: 41cm; Width: 32cm; Depth: 34cm</div> <div>\$0.00</div> <div>0</div>
	<div>SAB25</div> <div>STD ARCHIVE BOX [BUNDLE OF 25] Length: 39cm; Width: 31cm; Depth: 24cm</div> <div>\$0.00</div> <div>0</div>

# Creating a New Box

Go to the Home Screen and click on the **Create Tab**

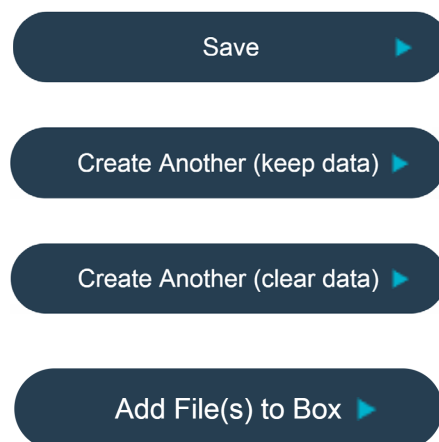
- Add **Barcode details** (including ALPHA and DASH) to the Barcode field.
- Add information relating to the contents of the box:
  - \* Reference 1, 2, 3 = 50 Characters.
  - \* FROM / TO Range = Alpha or Numerical.
  - \* DATE Range = DD/MM/YYYY Format.
  - \* Description 1 = 2500 Characters.
  - \* Description 2 = 250 Characters.

A screenshot of the 'Create Box' form. The form has two tabs: 'Box' (selected) and 'File'. It is divided into two main sections: 'Client Details' and 'Box Details'. 'Client Details' includes fields for CLIENTCODE (ZZZ - OSS TRAINING ACCOUNT), ACCESS LEVEL (5 - Medium), COST CENTRE (0001 - CONSUMABLES ONLY), and three SERIES dropdowns (Select Series 1, Select Series 2, Select Series 3). 'Box Details' includes a BARCODE field (circled in red), LODGEMENT DATE (3/12/2018), STORAGE TYPE (SB - STANDARD BOX), REVIEW DATE (3/12/2018), and several other fields for references, ranges, and descriptions. Each field has a help icon (question mark) to its right.

## SAVE

- CLICK **Save** to create the box.
- **Create Another (keep data)** generates a new box barcode and retains existing data.
- **Create Another (clear data)** generates a new box barcode and clears all the data fields

If wanting to create files into this box please click on **Add File(s) to Box**.



# Creating a New File

## OPTION A

- Click Add **File(s) to Box** in the box creation screen.
- Add **File Barcode**.
- Add information relating to the contents of the File.
  - \* Reference 1, 2, 3 = 50 Characters.
  - \* FROM / TO Range = Alpha or Numerical.
  - \* DATE Range = DD/MM/YYYY Format.
  - \* Description 1 = 2500 Characters.
  - \* Description 2 = 250 Characters.



Add File(s) to Box ►

**Create**

Box **File**

**Client Details**

CLIENTCODE: ZZZ - OSS TRAINING ACCOUNT ?  
ACCESS LEVEL: 5 - Medium ?  
COST CENTRE: 0001 - CONSUMABLES ONLY ?

SERIES 1: Select Series 1 ?  
SERIES 2: Select Series 2 ?  
SERIES 3: Select Series 3 ?

**File Details**

**FILE BARCODE:** ?

BOX BARCODE: ?

LODGEMENT DATE: 3/12/2018 ?

AREA: ?

REFERENCE 3: ?

RECORD RANGE FROM: ?

DATE RANGE FROM: ?

DESCRIPTION 1: ?

DESCRIPTION 2: ?

STORAGE TYPE: FG - FILE ?

REVIEW DATE: 3/12/2028 ?

FILING/DESTYR: ?

REFERENCE 4: ?

RECORD RANGE TO: ?

DATE RANGE TO: ?

## SAVE

Save ►

Create Another (keep data) ►

Create Another (clear data) ►

CLICK **Save** to create File.

**Create Another (keep data)** generates a new file barcode (next sequential file barcode) and retains existing data.

**Create Another (clear data)** generates a new file barcode and clears all the data fields.

# Creating a New File

## OPTION B - Adding Files to existing boxes

- Go to the Home Page and click on the **Create** Tab.
- Click onto the **File** tab.
- Add **File Barcode**.
- Add **Box Barcode**.

CLICK on **Find Fileplan/Review Date** icon to automatically apply the box file plan to associated files (if you have your file plan in SAFE Records?)

Enter **File Details** to the below fields.



**Create**

Box File

**Client Details**

CLIENTCODE: ZZZ - OSS TRAINING ACCOUNT ?

ACCESS LEVEL: 5 - Medium ?

COST CENTRE: 0001 - CONSUMABLES ONLY ?

SERIES 1: Select Series 1 ?

SERIES 2: Select Series 2 ?

SERIES 3: Select Series 3 ?

**File Details**

FILE BARCODE: ?

BOX BARCODE: ?

LODGE MENT DATE: 3/12/2018 ?

AREA: ?

REFERENCE 3: ?

RECORD RANGE FROM: ?

DATE RANGE FROM: ?

DESCRIPTION 1: ?

DESCRIPTION 2: ?

STORAGE TYPE: FG - FILE ?

REVIEW DATE: 3/12/2028 ?

FILING/DESTYR: ?

REFERENCE 4: ?

RECORD RANGE TO: ?

DATE RANGE TO: ?

Save

Create Another (keep data)

Create Another (clear data)

**SAVE**

CLICK **Save** to create File.

**Create Another (keep data)** generates a new file barcode and retains existing data.

**Create Another (clear data)** generates a new file barcode and clears all the data fields.



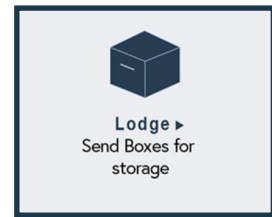
# Lodgements of New Items

Go to Home Screen and CLICK on the **Send** Tab

- Select Lodge Tab.

*This will generate a list of all the new boxes you have created.*

- Select correct Client Code.
- Tick/Select boxes for collection.



ClientCode:	ZZZ - OSS TRAINING ACCOUNT ▼		
▶	UNITID ▲	LODGE DATE	REFERENCE1
▶	<input checked="" type="checkbox"/> <u>ZZZ-56921</u>	21/02/2018	
▶	<input checked="" type="checkbox"/> <u>ZZZ-56922</u>	21/02/2018	
▶	<input checked="" type="checkbox"/> <u>ZZZ-56923</u>	21/02/2018	
▶	<input type="checkbox"/> <u>ZZZ-74596</u>	21/02/2018	

Lodgement Type:	INEW - NEW INTO STORE – LOCAL ▼ ?	Name:	DAVE LEULUAI ?
<b>Address:</b>	BREAST SCREENING WAIKATO ?	<b>Your Reference:</b>	?
	BREASTCARE CENT1/PEMBROKE ?	Instructions:	TEST1 LODGEMENT1 ?
	WAIKATO HOSPITAL; 1200 ?		
	New Zealand ?		

- Check collection **Address** details.
- Add **Your Reference** or **Special Instructions** (optional).
- CLICK **Submit Lodgement**.

Submit Lodgement ►

*A confirmation e-mail will be generated for your records*



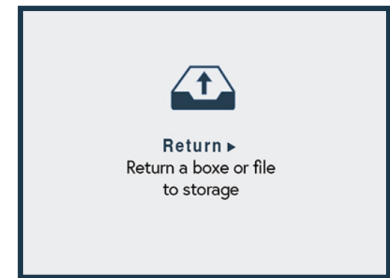
# Lodgement of a Return

Go to Home Screen and CLICK on the **Send** Tab

- Select Return Tab.
- Select correct **Client Code** followed by **show all item(s)**

*This will generate a list of all items currently OUT to you.*

- Tick/Select Boxes required to be returned Offsite *or*
- Tick/Select Boxes you would like to Permanently Retrieve



ClientCode: ZZZ - OSS TRAINING ACCOUNT ☒ Show all item(s) **Permanently Retrieve**

Export to Excel

	UNITID	RETRIEVAL DATE	WHO HAS IT	REFERENCE1	REFERENCE2
<input type="checkbox"/>	000211		TEST USER	TEST	000211A
<input type="checkbox"/>	000213		TEST USER	TEST	000213M
<input type="checkbox"/>	14921		TEST USER	SMITH DENISE	
<input type="checkbox"/>	15992		TEST USER	BROWN HEATHER	
<input type="checkbox"/>	AAA-1234		NATASHA SOUNESS	HOME	
<input type="checkbox"/>	NTHG0001		TEST USER		

Lodgement Type: IRTN - RETURN INTO STORE – LOCAL

**Address:** BREAS1T SCR1EENING WAIKA1TO  
BREASTCARE CENT1/PEMBROKE  
W4IK4TO H0STPITAL; 1200  
New Zealand

Name: DAVE LEULUAI

**Your Reference:**

Instructions: TEST1 LODGEMENT1

- Check collection **Address** details.
- Add **Your Reference** or **Special Instructions** (optional).
- CLICK **Submit Lodgement**.

**Submit Lodgement**

# Retrievals

Go to Home Screen and CLICK on the **Retrieve** tab.

Ensure the **Client Code** is correct

- Add File / Box information to KEYWORD field and CLICK **Search**.
- Tick / Select item(s) and CLICK **Add to Retrieval List** or **Retrieve Now**.



**Retrieve ▶**  
Receive boxes or files  
from TIMG

ClientCode: ZZZ - OSS TRAINING ACCOUNT Search option: Contains Item(s) in your Retrieval List: 0  
Keyword: | Select field(s): File/Box ID, AREA, FILING/DESTYR, REFERENCE 3, DESCRIPTION 1, DESCRIPTION 2 ▼

Search Show Advanced Search Add to Retrieval List Retrieve Now

- This will take you to the delivery and confirmation page, check to make sure all items ready for retrieval are the correct ones.
- On the left hand side, ensure that delivery details are correct and add a Reference or Special Instructions if applicable.
- CLICK Submit.

Delivery Details	Item(s) List									
<p>ClientCode: ZZZ - OSS TRAINING ACCOUNT</p> <p>Retrieval Type: OPRI - STANDARD DELIVERY – LOCAL</p> <p>Name: TEST TRAINING</p> <p>Address: do not send TRAINING ONLY</p> <p>AUCKLAND</p> <p>NEW ZEALAND</p> <p>New Zealand</p> <p>Your Reference:</p> <p>Instructions:</p> <p>Submit</p>	<table><thead><tr><th>UNITID</th><th>BOXID</th><th>AREA</th></tr></thead><tbody><tr><td colspan="3">No records to display.</td></tr><tr><td colspan="3">Page Size: 100</td></tr></tbody></table>	UNITID	BOXID	AREA	No records to display.			Page Size: 100		
UNITID	BOXID	AREA								
No records to display.										
Page Size: 100										

# Manage

Go to Home Screen and CLICK on the **Manage** tab.

Ensure Client Code is correct

- Add File / Box information to KEYWORD field and CLICK **Search**.
- Click on **Unit ID** to bring up box information.



**Manage** ►  
Change the details of  
Boxes or Files

ClientCode: ZZZ - OSS TRAINING ACCOUNT Search option: Contains Item(s) in your Retrieval List: 0

Keyword: d Select field(s): File/Box ID, AREA, FILING/DESTYR, REFERENCE 3, DESCRIPTION 1, DESCRIPTION 2

Search Show Advanced Search Add to Retrieval List Retrieve Now

Export to Excel

UNITID	PARENTID	INDICATOR	WHO HAS IT	AREA	FILING/DESTYR
00012342	ZZZ-01960	NEW	NATASHA SOUNESS	JOE SMITH BROTHER	
00012343	ZZZ-01960	NEW	NATASHA SOUNESS	JOE SMITH	
000211	ZZZ-56231	OUT	TEST USER	TEST	000211A

- This will take you to a screen that displays all the relevant information that is connected to the box/File.
- From here you have the ability to add new information to the Box/File concerned.
- Once completed ensure that you click the **Save** or **Save & Close** button at the bottom of the page.

**Client Details**

CLIENTCODE: ZZZ SERIES 1: Select Series 1

ACCESS LEVEL: 5 - Medium SERIES 2: Select Series 2

COST CENTRE: Select Cost Centre SERIES 3: Select Series3

**Details**

BARCODE: 00012342

BOX BARCODE: ZZZ-01960 STORAGE TYPE: FG - FILE

LODGE MENT DATE: 9/09/2009 REVIEW DATE: 9/09/2019

AREA: JOE SMITH BROTHER FILING/DESTYR:

REFERENCE 3: REFERENCE 4:

RECORD RANGE FROM: RECORD RANGE TO:

DATE RANGE FROM: 1/01/1900 DATE RANGE TO: 1/01/1900

DESCRIPTION 1:

DESCRIPTION 2:

Save


# Destruction of Boxes

Go to Home Screen and CLICK on the **Destroy** tab.

- Select the correct **Client Code**.
- Enter a **Review Date**.
- Tick / Select boxes required for destruction.



**Destroy ▶**  
Create a list of boxes  
for destruction or review  
( Coming soon! )

Client Code: AAA - AAA COMMERCIAL DEMO Review Date: 14/11/2017  [Run Destruction List ▶](#) [Destruction List in Excel !\[\]\(3548212f2313bdc7fdcdb1410b31caf5\_img.jpg\)](#)

▶	<input type="checkbox"/>	UNITID ▲	STORAGETYPE	INDICATOR
▶	<input type="checkbox"/>	AAA-00786	SB	OUT
▶	<input checked="" type="checkbox"/>	AAA-07010	SB	OUT
▶	<input type="checkbox"/>	AAA-07011	SB	OUT
▶	<input type="checkbox"/>	AAA-07012	SB	OUT
▶	<input type="checkbox"/>	AAA-33333	SB	IN
▶	<input type="checkbox"/>	AAA-34001	SB	IN

- Once all boxes required for destruction have been selected, CLICK **Submit Destruction List**:

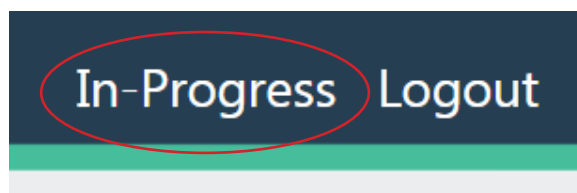
[Submit Destruction List ▶](#)

- As soon as Submit Destruction List has been clicked, a report will be emailed to the Authorised Destruction User for the account. This is to ensure that no boxes are destroyed without the correct authority.

# In-Progress Menu

This is used as a viewing platform for you to see all your current activity with TIMG regarding any Retrievals or Lodgements.

This can be located in the top right corner of the home page by clicking on the In-Progress Tab.



Once you have clicked on the In-Progress Tab, it will take you to a screen that list all your activities that haven't been completed by TIMG.

**Retrieval Activity** is located on the left-hand side:

Retrieval List			
BARCODE	RETRIEVAL NO	RETRIEVAL DATE	RETRIEVAL TIME
070921/0973C	RMM1709510	24/10/2017	12:26:33
070921/0973I	RMM1709510	24/10/2017	12:26:33
1114_668727	RMM1188428	11/10/2013	19:28:11
1114_679169	RMM1709515	30/10/2017	12:28:48

**Lodgement Activity** is located on the right-hand side:

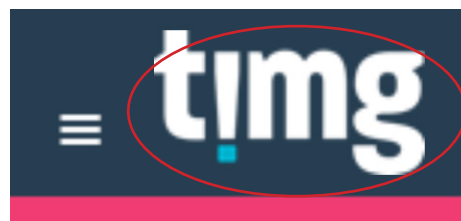
Lodgement List			
BARCODE	LODGE MENT NO	LODGE MENT DATE	LODGE MENT TIME
1114_686939	LMM1179372	15/05/2015	13:01:28
123456789	LMM1181213	27/05/2015	12:27:30
12358.2	LMM1271694	29/11/2016	10:43:02
9870000010	L1304578	28/09/2017	11:16:06












# Navigation Guide






A new feature of SAFE Records has been the introduction of a Navigation Guide. This can be located by clicking on the TIMG logo in the top left hand corner.

Navigation Guide is used for the following purpose:

- Admin
  - User and new password creation.
- Reporting
  - Holdings, Connote, Retrieval and Lodgement Reports.
- A shortcut to key service functions of SAFE:
  - Express Returns.
  - Express, Normal or Manual Retrievals.
  - Scan & Email options.
  - Express PERM.



	Create	
	Home	
	Send	▼
	Retrieval	▼
	Manage	
	User	▼
	Reports	▼
	Buy	
	Destruction	▼
	Password	
	Help	▼
	Logout	

<div> Reports ^</div> <div>Holding Report Connote Report Retrieval Report Lodgement Report</div>	<div> Retrieval ^</div> <div>Normal Retrieval Manual Retrieval Scan &amp; Email Express Retrieval Express PERM Digital File</div>	<div> User ^</div> <div>User Creation User Modification ClientCode Relationship Settings File Header Box Header Client Log</div>
<div> Help ^</div> <div>FAQ Contact Manual</div>	<div> Send ^</div> <div>Return Express Return New Lodgement</div>	

# Frequently Asked Questions (FAQs)

## WHAT ARE 'ACCESS LEVELS'?

Access Levels refers to the level of security which is assigned to each requestor and item being stored. A requestor can retrieve information that has been assigned the same or lower access level. The access level ranges from 01 – 09 (1 = lowest and 9 = highest). Most information lodged has a defaulted access level of 05.

## WHAT ARE THE STEPS FOR RUNNING A REPORT?

Select REPORT function in main menu. Please Note: If you have access to multiple client codes then you need to select the client code you wish to search for. Tick "Complete Holding" and "include child items" Click "Run Report". Open report in Excel format.

## HOW DO YOU EDIT BOXES THAT ARE STORED AT TIMG?

Go to SEARCH > modify. Tick Box Barcode. Add file / box barcode number to Keyword field and then click Express Search.

Click on Unit ID (file / box barcode number), edit data and click SAVE.

## "UNIT ID ALREADY EXISTS?"

The Box / File barcode cannot be reused and if you try to use a barcode which already exists in the system you will receive the above error message.

## HOW SHOULD THE DATE BE RECORDED?

Always use Y2K format i.e. DD/MM/YYYY.

## WHAT DOES "REVIEW DATE" MEAN?

The "Review Date" is the date set for the item (Box or File) to be reviewed / appraised before the item is confirmed for destruction.

This is not an automatic destruction date and TIMG will not destroy any item unless written approval with authorizing signature has been received. The Review Date can be set to default to a specific time period e.g. 10 years or left blank to force the user to add an appropriate time period.

The default Review Date is for reference purposes only and does not necessarily comply with statutory requirements or your company policy. This default date is an indication of age only and should always be checked against your own database and current retention schedule.



# TIMG Records Management Contacts

## Auckland

Phone: 09 580 4360 Option 3  
E-mail: auckland.retrievals@TIMG.co.nz

## Hamilton

Phone: 07 850 7660  
E-mail: hamilton.cs@TIMG.co.nz

## Palmerston North

Phone: 06 354 2240  
Fax: 06 354 3848  
E-mail: requestspn@TIMG.co.nz

## Porirua

Phone: 04 239 6000  
Fax: 04 237 4976  
E-mail: porinfo@timg.co.nz

## Dunedin

Phone: 03 473 7582  
Email: dudinfo@timg.co.nz

## Highbrook

Phone: 09 250 5134  
E-mail: auckland.cs@TIMG.co.nz

## Hastings

Phone: 06 870 6916  
Email: htginfo@timg.co.nz

## Wellington

Phone: 04 498 2232  
Fax: 04 499 8791  
E-mail: requests.wgn@TIMG.co.nz

## Christchurch

Phone: 03 338 8668  
Fax: 03 374 6810  
E-mail: requests.chc@TIMG.co.nz



THE INFORMATION MANAGEMENT GROUP