

Butler Box & Storage is under contract to handle Capilano University's requirements for the off-site storage of archived files.

Authorized users can access Butler's website www.butlerboxandstorage.com to:

- view and/or update the list of their own department's stored boxes;
- order barcode labels;
- request pick-up of boxes going to storage and;
- request retrieval of boxes from the storage facility for delivery back to the department.

INITIAL ACCOUNT SETUP

Send an e-mail to the Purchasing Department at purchasing@capilanou.ca requesting an account setup for offsite records storage. Your request must contain:

- Name of Department
- Administrator/Department Head approval

The Administrator/Department Head will be emailed the username and passcode for their area. This one username and passcode may be used by one or more authorized users in the area.

Authorizing and monitoring of account use is the responsibility of the department/area. Should an employee leave the area the Administrator/Department Head can request a passcode change by sending an email to Purchasing Services at purchasing@capilanou.ca .

ORDERING SUPPLIES - BOXES AND LABELS

Boxes

- Order boxes only from Staples Advantage on-line ordering web portal eway.ca
- **Do not** order new boxes from Butler Box!
- Boxes must have lids and hand holes. Dimensions 12" wide X 15" deep X 10" high.
- **Repack all other types of boxes including those which are torn or broken**



Labels

- Butler Box provides pre-printed bar-coded labels that must be properly affixed to each carton. The codes identify both the department and the carton.
- Additional label series are ordered on-line as required by the authorized users.

Order Labels Request	
Quantity:	<input type="text"/>
Date requested: (if applicable)	2005-7-6
Send request	

BOX PREPARATION

- Use only the approved type of storage boxes. See “Ordering Supplies” section for details.
- Affix only 1 barcode label to each box and only on one end just below the handle hold.
- Labels **must be affixed to the box end directly below the handle hole**.
- Boxes that are incorrectly labelled cannot be stored and will be returned.

Affix only 1 label per box - below the handle hole.



- As boxes are filled and labelled complete the inventory listing.
- See “Generate Text Report” for instructions on exporting and importing your inventory listing.

WEBSITE FUNCTION INSTRUCTIONS


Log in to the secure website at www.butlerboxandstorage.com



Username:

Password:

Select your function from the Main Menu Screen



Welcome to the Butler Box database inventory service!

This system can be used to view the items you currently have stored with Butler Box, and allows you to request boxes online.

Please use the fields to the right to assist in your searching, and if you have any questions, please [email us](mailto:us).

Enter box search criteria:

Status: Any
 Checked Out
 Checked In

Butler ID:

Internal ID:

Description:

Creation Start Date:

Creation End Date:

Results/page: 100

Sort By:

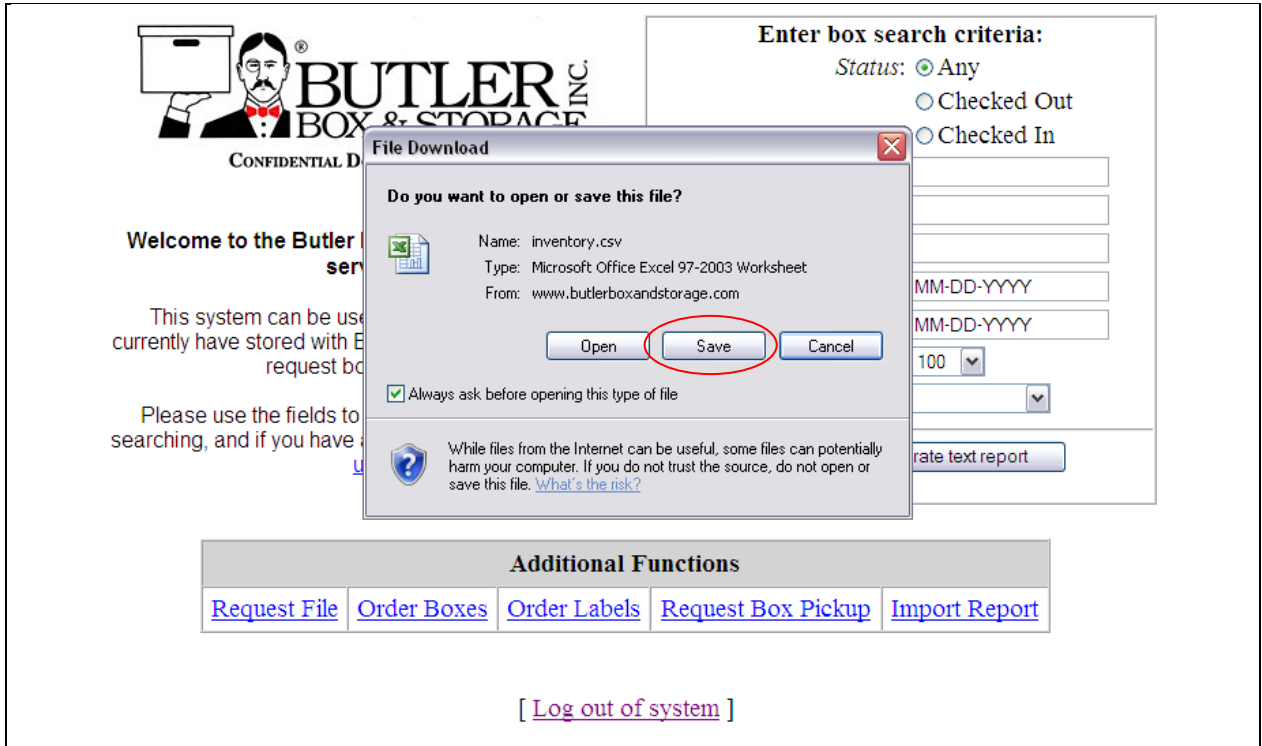
Additional Functions

[Request File](#) [Order Boxes](#) [Order Labels](#) [Request Box Pickup](#)

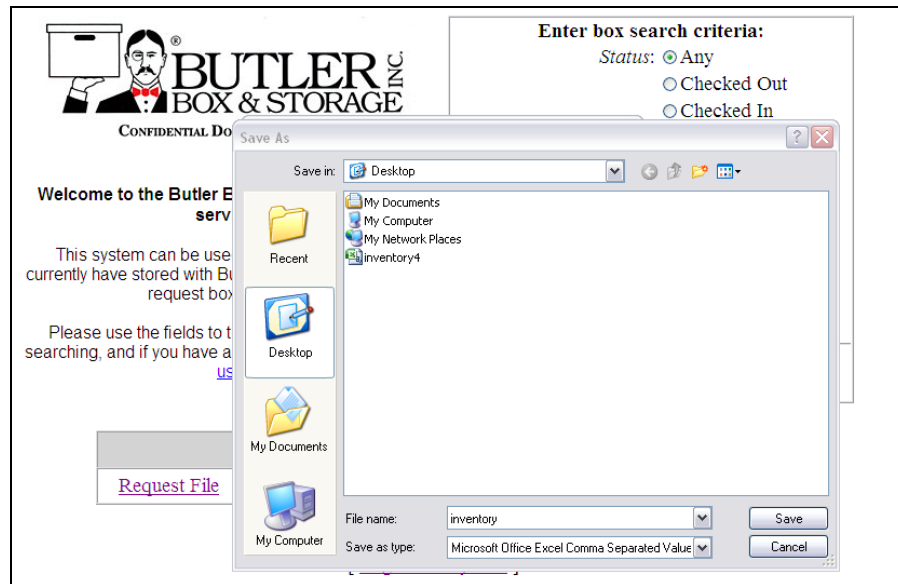
[[Log out of system](#)]

Generate Text Reports and Enter Box Information – Updating Box Inventory

- Click on “generate text report”.
- Select “Save”.



- Save the exported to your desktop or any other folder. “Inventory” is the default name of the file being saved.



- Return to the main menu and logout of Butler Box until you are ready to submit your changes (“import report”) or perform other functions.
- Open the saved spreadsheet and update your inventory listing as boxes are prepared for storage.

Spreadsheet Column Descriptions:

“ButlerBox_ID”	Barcode numbers issued to your department.
“Internal_ID”	May be used for additional identification. OK to leave blank.
“Description”	Description of contents of each box.
“Creation Date”	Generated when your labels are issued.
“Status”	“In Transit” labels have been issued but boxes have not received into the Butler Box Storage Facility.
	“In” your boxes that are in the storage facility
	“Out” your retrieved boxes not yet returned to the facility.

	A	B	C	D	E	F	G	H
1	ButlerBox_ID	Internal_ID	Description	Creation Date	Retention Date	Status		
2	2104686		CS-CR-04/02	Aug 24 2005 12:00:00:000AM	2010-AUG-01	In		
3	2104795		CS-PINK-200230 SH-Z	Aug 24 2005 12:00:00:000AM		Out		
4	2134376					In Transit		

- Enter the box description. Use enough detail to ensure you can identify the contents when it comes time to retrieve files.
- Enter the Retention Date. Use the same date format each time for consistency when sorting. This date refers to how long the box should be kept until destroyed – 7 years is required for most types of records).
- Save the spreadsheet frequently while working to preserve your changes.
- When updates are finished import the spreadsheet back into the Butler Box website.

Import Updated Spreadsheet Back to Butler Box Website

- From the main page of the Butler site choose “import report”.



- On the following screen click “browse” and scroll to the location of the saved spreadsheet.

- Double click the filename or click “open”.
- Click “upload” to send the file and the changes will update the Butler Box website.
- You can now Exit to main menu and logout or choose other tasks.

Sending Boxes to Storage – for “new intake” or returning retrieved boxes

- Select “Request Box Pickup”



- Complete the “Box Pickup Request” screen.

Box Pickup Request	
Number of Boxes:	<input type="text"/>
Contact:	<input type="text"/>
Date requested: (if applicable)	<input type="text" value="2005-7-6"/>
<input type="button" value="Send request"/>	

Number of Boxes: If there are greater than 100 boxes please first contact the University’s Shipping & Receiving at local 2040 so they can pick up the boxes and have them palletized at the loading dock. They will let you know when the boxes will be ready for pickup by Butler Box.

Less than 100 boxes will be picked up directly from your department by Butler Box.

Contact: Provide contact name, department name, phone number & pickup location and times the office is open for pickup. This field will accommodate all the required information.

Date Requested: The date boxes will be ready for pickup.

Retrieved Files / Boxes: Butler Box will pickup the boxes and re-scan the barcode on the box and update its status on their website to “checked in”

Need Additional Information?

Send an e-mail to Purchasing Services at purchasing@capilanou.ca or call local 7553.