

Overview

FileBRIDGE Records is a faster, smarter client web interface for customers to use when accessing, updating or viewing their inventory. Search features in FileBRIDGE Records provide an easy way search the system inventory and request delivery/pickup and other services.

Performing a Quick Search

After logging into FileBRIDGE Records, customers can access the Search menu option right on the Home page (Fig. 1).

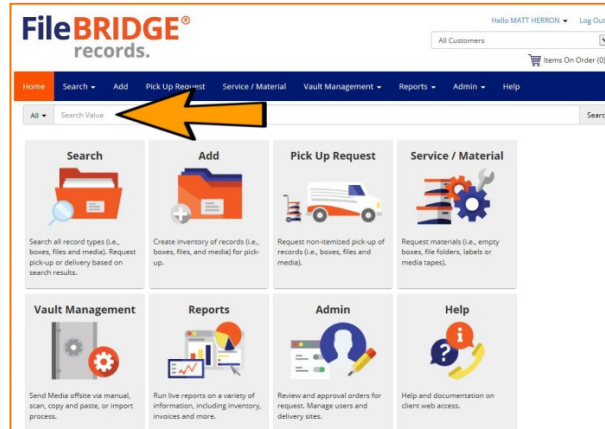


Fig. 1

From the Search bar, type in a search value to return results that selected Reference Field or item barcode number at the left, or use the **All** option to search across all available reference fields. Press the **<Search>** button to return the results (Fig. 2).

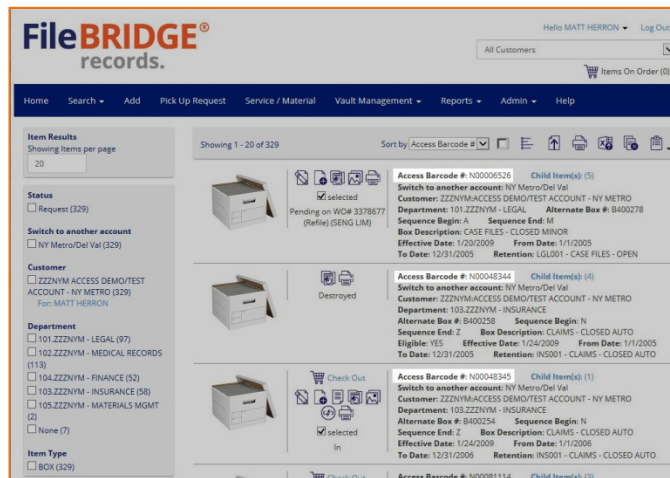


Fig. 2

Searching across **All** reference fields is the default search option.

Reference field value matches are highlighted in **yellow**.

Inventory searches can be performed across all customer accounts that the logged in user has access to, or restricted to a single customer account's inventory by using the dropdown menu at the top right corner of the page, below the user's name.

Wild card searches are also supported. Use the “%” character to indicate a wildcard search. The default search behavior is the search for matches that **begin with** the value entered (i.e. ‘VALUE%’). Using wildcard searches also allow for a search for inventory that **ends with** the value entered (i.e. ‘%VALUE’) or **contains** the value entered (i.e. ‘%VALUE%’).

Wildcard searches are supported when searching individual reference fields or when searching **All** reference fields.

*PLEASE NOTE: Wildcard searches across **All** reference fields may result in a longer search time when compared with searches against a single reference field. Also, wildcard searches for matches **containing** longer text values may take longer than wildcard searches for matches **containing** shorter text values.*

The menu at the left of the results screen can be used to apply filters to the results to select inventory from a combination of inventory status (in/out), customers, departments, item types, etc. (Fig. 3).

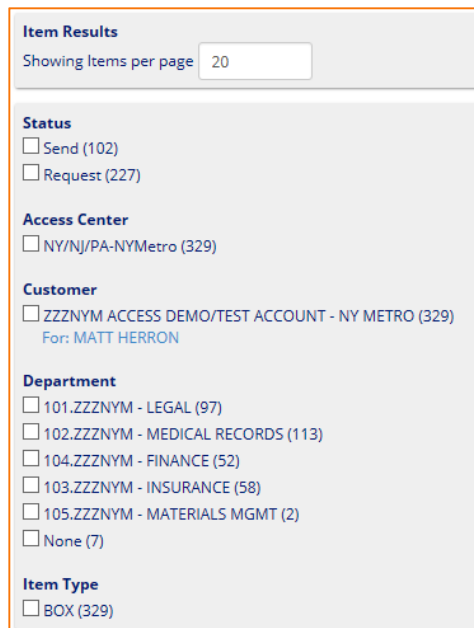


Fig. 3

Select which filters to apply or remove by clicking on the box at the left to check or uncheck the filter, respectively.

Use the action menu to select the appropriate action for the appropriate record in the search results (Fig. 4).

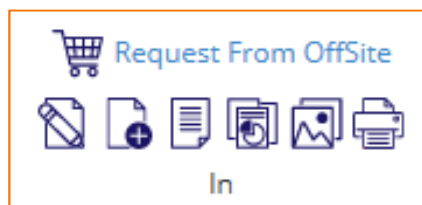


Fig. 4

PLEASE NOTE: Permissions granted to the web user, the settings for the item type in inventory and the inventory status will determine which actions are available in the action menu for any record in the search results.

Request from Offsite – Click on this option to add the item to the shopping cart as a request for delivery.

Send Offsite – Click on this option to add the item to the shopping cart as a request for pickup.

Remove Item – Click on this option to add the item to the shopping cart as a request for removal (or destruction) from inventory.



Edit Item – Press this button to edit the available reference fields, notes and/or dates for the item in inventory, as needed. The Edit Item screen will be displayed (Fig. 5).

The screenshot shows the 'Edit' form with the following fields and values:

- Item Code: N00048345
- Department: 103.ZZZNYM - INSURANCE
- Alternate Box #: B400254
- Sequence Begin: N
- Sequence End: Z
- Box Description: CLAIMS - CLOSED AUTO
- Eligible:
- From Date: 1/1/2006
- To Date: 12/31/2006
- Retention: INS001 - CLAIMS - CLOSED AUTO (with a 'Browse' button)
- User Logon: MATT HERRON
- Long Description: (empty text area)
- Indexed Notes: (empty text area)

At the bottom right of the form are 'Save' and 'Close' buttons.

Fig. 5

Press the **<Save>** button to update the item's reference field data and any other relevant information available to be edited for this item. The Edit Item screen will be closed after saving. Press the **<Close>** button at any time to discard any changes made to the item and return to the search results without changing any information.



Add Item to Parent – Press this button add new child items to the existing parent item in inventory (e.g. add files to a box). The Add item screen will be displayed (Fig. 6).

Fig. 6

Enter in the appropriate reference field and other relevant information for the new child item, as needed. Items added to the parent item in the current web session will be listed at the bottom of the Add Item screen. Press the **<Save>** button to add the new child item to the parent. The new item will be added to the list at the bottom after saving. Data entered into the available reference fields will be retained for any new adds. Press the **<Close>** button to return to the search results when finished adding new items to the parent.

PLEASE NOTE: Items added to the parent in this manner will create Add lines on the web order. Items added to the system using the **<Add Item to Parent>** will **not** also be requested for delivery.



Request Non-Indexed Contents – Press this button add new child items to the existing parent item in inventory (e.g. add files to a box) while at the same time, requesting these new items for delivery. The Add item screen will be displayed (Fig. 7).

Fig. 7

Enter in the appropriate reference field and other relevant information for the new child item, as needed. Items added to the parent item in the current web session will be listed at the bottom of the Add Item screen. Press the **<Save>** button to add the new child item to the parent. The new item will be added to the list at the bottom after saving. Data entered into the available reference fields will be retained for any new adds. Press the **<Close>** button to return to the search results when finished adding new items to the parent.

PLEASE NOTE: Items added to the parent in this manner will create Add lines on the web order as well as retrieval request lines to deliver the new child items added to the parent.



Item History Report – Press this button to view the item history report for the selected item. The report can be printed, previewed and/or exported to multiple formats. Press the **< Item History Report>** button to select a format (Fig. 8).

The screenshot shows a dialog box titled "Item History Report". Inside, there is a "Report Type" label above a dropdown menu. The dropdown menu currently displays "PDF". Below the dropdown menu, there are two buttons: "Print" and "Close".

Fig. 8

Select PDF, Image, Word, Excel or HTML format to print/preview/export the Item History report and press the **<Save>** button (Fig. 9).

The screenshot shows the output of the Item History Report. At the top left is the date "7/22/2016" and at the top right is the time "6:48 AM". The title "Item History Report" is centered, followed by "Access/Northeast: NY/NJ/PA-New York Metro" and "Retrievex Barcode #: N00893502". Below this is a table with columns: "Alternate Box #", "Sequence Begin", "From Date", "To Date", "Destruction Review", and "Long Description". A horizontal line separates this header from another table below. The second table has columns: "Work Order", "Date", "Action", "Requested For", and "Line Comments".

Work Order	Date	Action	Requested For	Line Comments
2817198	2/13/2014	Miscellaneous		
2817198	2/13/2014	New Item Added		

Fig. 9



Attach an Image to Item – Press this button to view the Attach Image screen (Fig. 10).

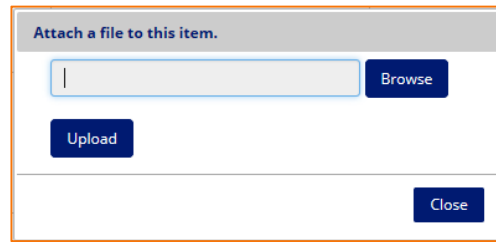


Fig. 10

Press the **<Browse>** button to locate the appropriate image to be uploaded for this item using Windows Explorer on the local workstation and press the **<Upload>** button to upload the image to the web server and attach it to the item (Fig. 11).

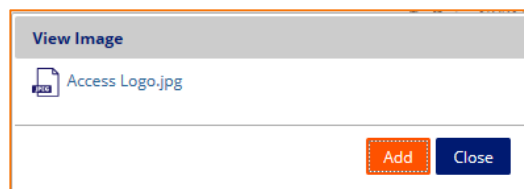


Fig. 11

After an images have been attached to the item in inventory, press the Attach Image on the results screen to display the View Image button. Click on the name of the file to view the attachment. Press the **<Add>** button to overwrite the current image. Press the **<Close>** button to return to the search results.

PLEASE NOTE: Certain system settings will determine if only a single image can be attached to any given item at a time or if multiple files – in multiple formats – can be attached to a single item in inventory.

Performing an Advanced Search

Use the **Search > Advanced Search** menu option bar to perform more advanced searches based on the criteria provided using an intuitive, a user-friendly interface to build a results set (Fig. 12).

Search Criteria	Operator	Search Value
Access Barcode #	Equals	Search Value
Alternate Box #	Equals	Search Value
Sequence Begin	Equals	Search Value
Sequence End	Equals	Search Value
Box Description	Equals	Search Value
Eligible	Equals	Search Value
Long Description	Equals	Search Value
Effective Date	Equals	Search Value
From Date	Equals	Search Value
To Date	Equals	Search Value
Retention	Equals	Search Value
Indexed Notes	Equals	Search Value
Item Holds	Equals	Search Value
User Logon	Equals	Search Value

Fig. 12

Use the Advanced Inventory Search fields at the left to define the general search parameters including the customer account for which inventory will be searched, the department to which inventory belongs as well as the item type, storage code and inventory status (Fig. 13).

Advanced Inventory Search

Customer: NY Metro/Del Val.ZZZNYM.ACCESS DEMO/TEST ACCOUNT - N

Department: All

Type: BOX

Service Code: All

Item Status: All

Search

Fig. 13

Select the appropriate parameters from the dropdown lists provided.

Enter the search values into the available reference fields using the section at the right of the Advanced Search screen. Select the operator for each reference field (Equals, Greater Than, Less than, Is Blank, Between, Contains, In List or Ends With) to query inventory for the appropriate results. Leave any reference field search value(s) undefined if not needed for the current search (Fig. 14).

Enter Search Values		
Access Barcode #	Equals	Search Value
Alternate Box #	Equals	Search Value
Sequence Begin	Equals	Search Value
Sequence End	Equals	Search Value
Box Description	Equals	Search Value
Eligible	Equals	Search Value
Long Description	Equals	Search Value
Effective Date	Equals	
From Date	Equals	
To Date	Equals	
Retention	Equals	Search Value
Indexed Notes	Equals	Search Value
Item Holds	Equals	Search Value
User Logon	Equals	Search Value

Fig. 14

Press the Search button after entering the appropriate search credentials to return the expected results set (Fig. 15).

The screenshot shows the FileBRIDGE records web application interface. At the top right, it says "Hello MATT HERRON" and "Log Out". Below that is a dropdown menu for "All Customers" and a shopping cart icon labeled "Items On Order (0)". The navigation menu includes: Home, Search, Add, Pick Up Request, Service / Material, Vault Management, Reports, Admin, and Help.

On the left side, there are filter sections:

- Item Status:** Showing Items per page: 20
- Status:** Request (329)
- Switch to another account:** NY Metro/Del Val (329)
- Customer:** ZZZNYM ACCESS DEMO/TEST ACCOUNT - NY METRO (329) For: MATT HERRON
- Department:**
 - 101.ZZZNYM - LEGAL (97)
 - 102.ZZZNYM - MEDICAL RECORDS (113)
 - 104.ZZZNYM - FINANCE (52)
 - 105.ZZZNYM - INSURANCE (58)
 - 105.ZZZNYM - MATERIALS MGMT (2)
 - None (7)
- Item Type:** BOX (329)

The main content area shows "Showing 1 - 20 of 329" items. The items are sorted by "Access Barcode #". Each item entry includes an icon, a status, and detailed information:

- Item 1:** Access Barcode #: N00006526, Child Item(s): (5). Status: Pending on WO# 3378677 (Refile) (SENG LIM). Details: Switch to another account: NY Metro/Del Val; Customer: ZZZNYM-ACCESS DEMO/TEST ACCOUNT - NY METRO; Department: 101.ZZZNYM - LEGAL; Alternate Box #: B400278; Sequence Begin: A, Sequence End: M; Box Description: CASE FILES - CLOSED MINOR; Effective Date: 1/20/2009; From Date: 1/1/2005, To Date: 12/31/2005; Retention: LGL001 - CASE FILES - OPEN.
- Item 2:** Access Barcode #: N00048344, Child Item(s): (4). Status: Destroyed. Details: Switch to another account: NY Metro/Del Val; Customer: ZZZNYM-ACCESS DEMO/TEST ACCOUNT - NY METRO; Department: 103.ZZZNYM - INSURANCE; Alternate Box #: B400258; Sequence Begin: N, Sequence End: Z; Box Description: CLAIMS - CLOSED AUTO; Eligible: YES; Effective Date: 1/24/2009, From Date: 1/1/2005, To Date: 12/31/2005; Retention: INS001 - CLAIMS - CLOSED AUTO.
- Item 3:** Access Barcode #: N00048345, Child Item(s): (1). Status: In. Details: Switch to another account: NY Metro/Del Val; Customer: ZZZNYM-ACCESS DEMO/TEST ACCOUNT - NY METRO; Department: 103.ZZZNYM - INSURANCE; Alternate Box #: B400254; Sequence Begin: N, Sequence End: Z; Box Description: CLAIMS - CLOSED AUTO; Effective Date: 1/24/2009; From Date: 1/1/2006, To Date: 12/31/2006; Retention: INS001 - CLAIMS - CLOSED AUTO.

Fig. 15

The same features and functionality detailed in the Quick Search section previously applies to the Advanced Search results.

Adding Items on the Web

Use the **Add** menu option to easily add items to the system. Normally new parent items are added to the system in this way (i.e. Boxes). Child items (i.e. Files) are normally added using the Add Item to Parent button or the Request Non-Indexed Contents button on the search results screen, detailed in the previous sections. New items can be added to inventory quickly and easily using the Add menu option in FileBRIDGE Records (Fig. 16).

The screenshot shows the 'Add Item' form with the following fields and values:

- Customer: NY Metro/Del Val.ZZZNYM-A
- Department: [Dropdown]
- Type: BOX
- Requested For: MATT HERRON
- Retain data entered on add
- Access Barcode #: [Text]
- Alternate Box #: [Text]
- Sequence Begin: [Text]
- Sequence End: [Text]
- Box Description: [Text]
- Eligible: [Dropdown]
- From Date: [Text]
- To Date: [Text]
- Retention: [Text] [Browse]
- User Logon: MATT HERRON
- Long Description: [Text]
- Indexed Notes: [Text]
- Buttons: Save, Close

Fig. 16

The Add Item screen is used to add new items into inventory. Select the Department (if applicable), the appropriate Item Type (if needed) and enter in the appropriate barcode number (usually provided by the records center as a pre-printed label) and reference field information for each new item to be added to inventory

Retain Data entered on Add – Use this option to retain any data entry values entered on the Add Item screen after the **<Save>** button is pressed to add new item to the web order.

Press the **<Save>** button to add a new Add line to the web order and save the reference field data for the newly added item into inventory.

Press the **<Close>** button to exit the Add Item screen and return to the View Order screen to see all items added to the current web order, including any other add, delivery and/or pickup requests that have been added to the current web order.

Miscellaneous Service / Material Requests

Use the **Service / Material** menu option to easily request miscellaneous services and/or material sales from the records center. The Service / Material screen will appear (Fig. 18).

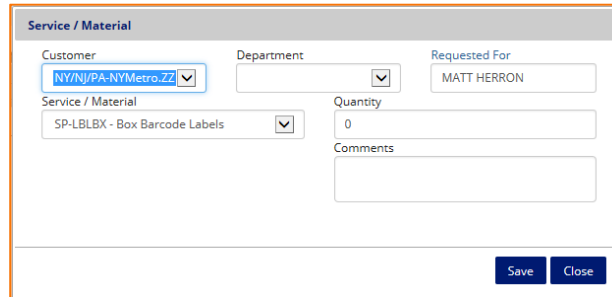


Fig. 18

Select the type of service/ material requested and the billing department, if applicable. Enter the quantity for each service/ material requested. Use the Comment's field to enter any relevant notes for this pickup request, if needed.

Press the **<Save>** button to add a new service/ material request line to the web order.

Press the **<Close>** button to exit the Service / Material screen and return to the shopping cart.

Submitting the Web Order

After all items have been added to the web order, view the shopping cart by clicking **the Items on Order** option at the top of the screen, under the logged in user name at the right (Fig. 19).

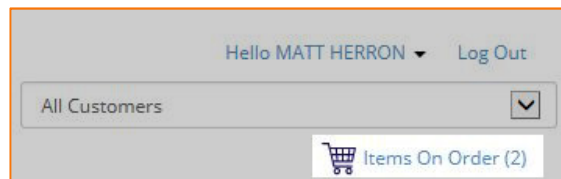


Fig. 19

PLEASE NOTE: If the **Add** menu option has been used, closing the Add Item screen will also display the shopping cart automatically.

The shopping cart will display all web order line items that have not been submitted to the records center at this time, including all previous delivery, pickup, add and any other service requests (Fig. 20).

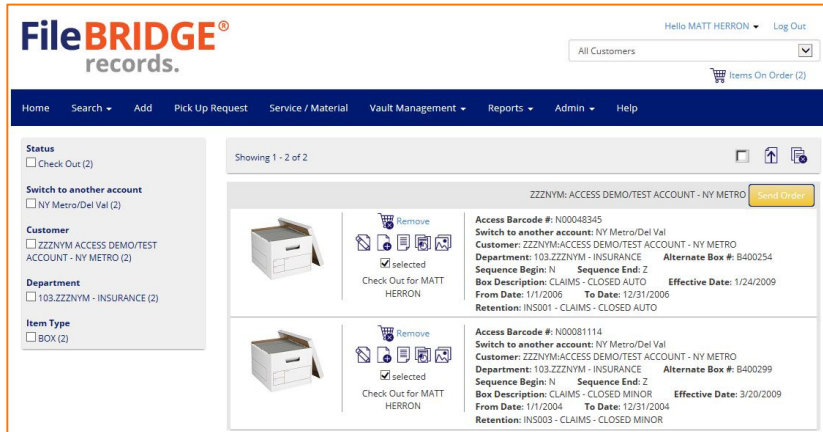


Fig. 20

The menu at the left can be used to apply filters to the shopping cart to further processing of web order lines using a combination of line status (Add, Retrieve, Refile, etc.), customers, departments, item types, etc. (Fig. 21).

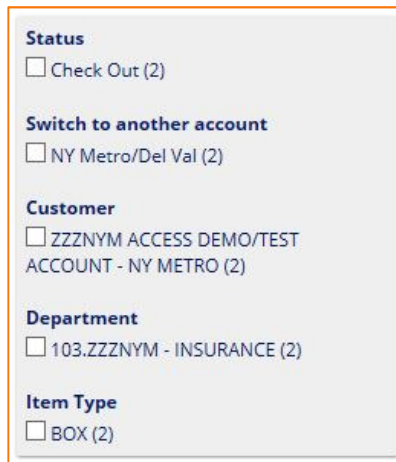


Fig. 21

Use the action menu to select the appropriate action for the appropriate record in the search results (Fig. 22).

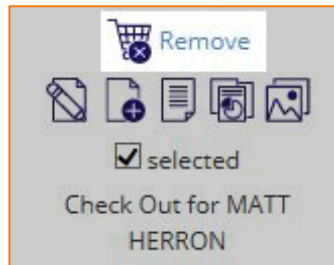


Fig. 22

PLEASE NOTE: Permissions granted to the web user, the settings for the item type in inventory and the inventory status will determine which actions are available in the action menu for any record in the search results.

Remove – Click on this option to remove the single item from the shopping cart at this time.

The Edit, Add Item to Parent, Non-Indexed Contents, Item Report and Attach Image features in the shopping cart all function the same way as the same features in the search results, detailed previously.

Use the **<Remove All>** button to remove all listed items from the shopping cart, if needed (Fig. 23).

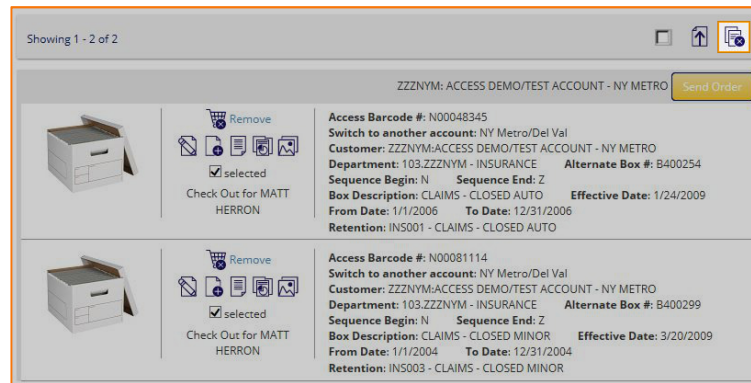


Fig. 23

Once the shopping cart has been reviewed and all line items are confirmed for action, use the **<Send Order>** button at the right to submit the web order to the records center (Fig. 24).

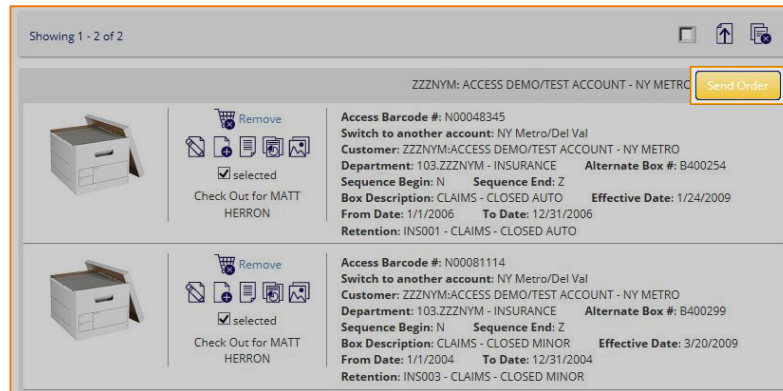


Fig. 24

The Send Order screen will appear (Fig. 25).

Fig. 25

Select or set the appropriate delivery/pickup address, additional order information, the delivery priority to determine the service date and any comments relevant for this order that the records center should be made aware.

Press the **<Send>** button to submit the web order at this time.

If necessary to send the web order at a later date, press the **<Cancel>** button instead to cancel the send order request and return to the shopping cart. No order will be sent at this time.

The web order confirmation screen will be displayed with the summary of the submitted order, which can be printed or exported to PDF, Image, Word, Excel or HTML format (Fig. 26).

Access Barcode #	Parent Code	Alternate Box #	Reference 2	Sequence Begin	Sequence End	Action	Location
N00048345		B400254		N	Z	Check In	
N00081114		B400299		N	Z	Check In	

Fig. 26