

Overview

FileBRIDGE Records is a faster, smarter client web interface for customers to use when viewing their Destruction Bin inventory and requesting tip or swap services for the existing bin inventory.





Requesting Bin Services

After logging into the FileBRIDGE Records, customers can access the **Bin Service** menu option or **<Bin Service>** button right on the Home page (Fig. 1).

Home	e Search - Add Pi	ck Up Request Service / Mater	ial Vault Management	Service Bin Reports 👻 Admin	n ✔ Help
All	Search Value				
We	lcome to FileLineACCESS, your	Online Information Management re	source!		
	dly contact Access Customer Se will be glad to help.	ervice at 1 877 FileLine with any que	stions or concerns you may have		
То	learn more about Access servic	es please visit www.informationpro	tected.com		
	Search	Add	Pick Up Request	Service / Material	Vault Management
			1	⊒¢	00
	dvanced Inventory ingle Item Search	Search all record types (i.e., boxes, files and media). Request pick-up or delivery based on search results.	Send media offsite or request media from offsite. Verify media inbound and outbound.	Manage on site batches by editing a batch, closing a batch or print the batch and barcode labels.	Send media offsite or request media from offsite. Verify media inbound and outbound.
	Service Bin	Reports	Admin	Help	
	23		.	ø	
	equest Bin Service based on bin acations or bin numbers.	Run live reports on a variety of information, including inventory, invoices and more.	Review and approval orders for request. Manage users and delivery sites.	Help and documentation on client web access.	
		Order History Invoice Report	Delivery Site Setup Edit Users		

Fig. 1

The Bins Service screen is displayed (Fig. 2).

File	eBF rec	RIC ord	GE [®] s.						
Home	Search 👻	Add	Pick Up Request	Service / Material	Vault Management	Service Bin	Reports 👻	Admin 👻	Help
Bin Serv	ice select	ion							
All Custon	ners								
Department									
Bin Type All									
		Sear	ch						



Use the Search criteria at the left to indicate for which account bin service will be requested, for which department (if applicable) and for which type of bin will service be requested.

After entering the parameters in the Bin Service selection, press the **Search**> button (Fig. 3).





Bin Service selection	
Customer	
All Customers	~
Department	
	~
Bin Type	
All	~
Search	



The search results are displayed in the section at the right (Fig. 4).

FileBRIDGE °			All Custon	ners	Hello MATT HERRON 🔸 Log Out
records.					ttems On Order (18)
Home Search - Add Pick Up Request Servi	e / Material Vault Management	Service Bin Reports 🗸	Admin 🗸 Help		
Bin Service selection	Showing 1 - 8 of 8			Sort by Bin Code: Asce	ending Service All
Customer All Customers		Service Bin	Customer: NY/NJ/PA-NYMetro.ACCESS DEM Placement / Description: petes office	O/TEST ACCOUNT - NY METRO Bin type: Standard Cabnet	Department: 101.ZZZNYM - LEGAL
Department					
Bin Type All		Service Bin	Customer: NY/NJ/PA-NYMetro.ACCESS DEM Placement / Description: X-Ray Room	O/TEST ACCOUNT - NY METRO Bin type: Standard Cabnet	Department: 101.ZZZNYM - LEGAL
Search					
		Service Bin	Customer: NY/NJ/PA-NYMetro.ACCESS DEM Placement / Description: room 2 Bin t	O/TEST ACCOUNT - NY METRO type: Standard Cabnet	Department: 101.ZZZNYM - LEGAL
		Service Bin	Customer: NY/NJ/PA-NYMetro.ACCESS DEM Bin type: 96 GALLON BIN	O/TEST ACCOUNT - NY METRO	Placement / Description: Bin 1

Fig. 4

Use the Sort By selection to sort the bin results by bin barcode number or placement/description in either ascending or descending order.

The action menu contains the Service Bin option (Fig. 5).



Fig. 5

Service Bin – Click on this option to add the bin service to the shopping cart as a request for either *Tip* or *Swap* service, depending on the destruction bin type settings.





Miscellaneous Service / Material Requests

Use the *Service / Material* menu option to easily request miscellaneous services and/or material sales from the destruction operation. The Service / Material screen will appear (Fig. 6).

Customer	Department		Requested For
NY Metro/Del Val.ZZZI	•	\checkmark	MATT HERRON
Service / Material		Quantity	
SP-LBLBX - Box Barcode	Labels 🗸	0	
		Comments	

Fig. 6

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 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 bin service requests 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. 7).

	Hello MATT HERRON 👻 Log Ou
All Customers	
) Items On Order (2

Fig. 7

PLEASE NOTE: The shopping cart will also be made visible after exiting the Service / Materials screen.

The shopping cart will display all web order line items that have not been submitted to the destruction operation at this time, including all previous bin service requests and any other miscellaneous services or material sales requests (Fig. 8).

FileBRIDG				All Customers		•
records.					🕎 Items C	n Order (2)
Iome Search - Add Pick U	Jp Request Service / Material	Vault Management 🔸	Reports 🗸 Adm	in - Help		
Status	Showing 1 - 2 of 2					
Check Out (2)						
Switch to another account			ZZZNYM: A	CCESS DEMO/TEST AG	CCOUNT - NY METRO	Send Order
NY Metro/Del Val (2)		2 12				
ustomer		Remove	Access Barcode #: N000 Switch to another acco		-1	
777NYM ACCESS DEMO/TEST			Customer: ZZZNYM:ACC			
ACCOUNT - NY METRO (2)	in the second se	selected	Department: 103.ZZZN)	M - INSURANCE	Alternate Box #: B400	254
A read of the S		Check Out for MATT		Sequence End: Z		
Department		HERRON	Box Description: CLAIM From Date: 1/1/2006	5 - CLOSED AUTO To Date: 12/31/200	Effective Date: 1/24/2	2009
		TIERRON	Retention: INS001 - CLA		00	
103.ZZZNYM - INSURANCE (2)						
		-				
Item Type		Remove	Access Barcode #: N000	81114		
tem Type			Access Barcode #: N000 Switch to another acco	81114 unt: NY Metro/Del Va		
tem Type			Access Barcode #: N000	81114 unt: NY Metro/Del Va ESS DEMO/TEST ACC		299
tem Type		Selected	Access Barcode #: N000 Switch to another acco Customer: ZZZNYM:ACC Department: 103.ZZZN Sequence Begin: N	81114 unt: NY Metro/Del Va ESS DEMO/TEST ACC 'M - INSURANCE Sequence End: Z	OUNT - NY METRO Alternate Box #: B400	
□ 103.ZZZNYM - INSURANCE (2) Item Type □ BOX (2)			Access Barcode #: N000 Switch to another acco Customer: ZZZNYM:ACC Department: 103.ZZZNY	81114 unt: NY Metro/Del Va ESS DEMO/TEST ACC 'M - INSURANCE Sequence End: Z	OUNT - NY METRO Alternate Box #: B400 Effective Date: 3/20	

Fig. 8

The menu at the left of the shopping cart can be used to apply filters to the shopping cart for further processing web order lines using a combination of line status (Service Bin, Service / Materials, *etc.*), customers or departments, if applicable. (Fig. 9).





Status	
Check Out (2)	
Switch to another account	
NY Metro/Del Val (2)	
Customer	
ZZZNYM ACCESS DEMO/1	rest
ACCOUNT - NY METRO (2)	
Department	
103.ZZZNYM - INSURANC	E (2)
Item Type	
BOX (2)	

Fig. 9

Use the action menu to select the appropriate action for the appropriate record in the search results (Fig. 10).





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.

Edit Item – Press this button to edit the miscellaneous service / material sales line item on the web order. This will display the Service / Material screen for the selected line item (Fig. 11).





	Department		Requested For
NY Metro/Del Val.ZZZI 🗸		\sim	MATT HERRON
Service / Material		Quantity	
SP-LBLBX - Box Barcode L	abels 🖌	0	
		Comments	



Press the **<Save>** button to update the miscellaneous service / material sales line item. The Service / Material screen will be closed after saving. Press the **<Close>** button at any time to discard any changes made to the web order line item and return to the shopping cart without changing any information.

Use the **<Remove All>** button to remove all listed items from the shopping cart, if needed (Fig. 12).



Fig. 12

Once the shopping cart has been reviewed and all line items are confirmed for action, use the Submit Order button at the right to submit the web order to the records center (Fig. 13).







Fig. 13

The Send Order screen will appear (Fig. 14).

	and the second second second second second
Default Delivery Address	25 HOME NEWS ROW
Select Delivery Address	Address
	NEW BRUNSWICK
Building/Floor/Room/Suite/Dept	City
NJ	08901
State	Zip
Order Information	M
Customer Order Reference	Select Delivery Priority
×	\sim
Delivery Date	Charge to Department
Comments	

Fig. 14

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

Use the Delivery Date field to select a valid delivery date, based on the applicable delivery schedule for the delivery priority selected.

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. 15).

Eilo	DDI	DGE®						Hello MA	TT HERRON - Log	g Out
							All Custom	ers		~
	record	ds.							Items On Orde	er (0)
Home Se	arch + Add	Pick Up Reques	t Service / Mater	ial Vault	Management 👻	Reports 👻	Admin	+ Help		
Customer ZZZM	VYM: ACCESS DEN	10/TEST ACCOUNT - N	Y METRO							
							PDF		Repo	ort
7/19/2016 6:24 AM			OnS	ite Batch	Detail				in the second seco	
0:24 AM			ACCESS DEMO/	TESTACC		TPO				
Customer:	ZZZNYM -	ACCESS DEMO/TEST	ACCOUNT - NY METR	0						
Phone:			Batch	Number	0000019	MATT HERRO	N			
Address:		NEWS ROW NSWICK, NJ 08901		Requ Due I	ested Date/Time:: Date:	7/19/2016 6:24	4 AM			
Notes:										
Requested Fo	or: MATT HERRO	NC								
Item Type: BO	X									
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				
	-									
	Customer Pr	int		Customer Si	gnature			Date/Time		
Web_OnSiteBatch_01 Rev: 20160506 7.3.16									Page 1 of 1	

Fig. 15





Printing and Previewing Reports

Use the *Reports* menu option to print or preview Work Order or Invoice reports from the web (Fig. 16).

	Reports 🗸 🛛 Admin 🗸					
	Order History					
	Invoice Report					
ł	Retention Schedules					
	General Rep	oorts 'i				

Fig. 16

Work Orders

Select the *Reports > Order History* menu option to search for work orders and/or delivery receipt reports to be printed or previewed. The Order History Search screen will appear (Fig. 17).

Order History Search		
Customer		
All Customers		\checkmark
Department		
		\checkmark
Begin WO Code	End WO Code	
Begin Due Date	End Due Date	
Se	earch	

Fig. 17

Customer – If needed, select the appropriate customer for printing or previewing work order or delivery receipt reports. Use the <All Customers> option to search across all customers to which the web user has access.

Department – If the Customer selected is departmentalized, use the Department dropdown menu to select the appropriate department.

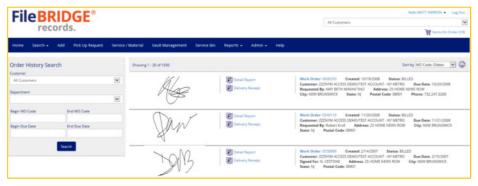
WO Code Range – Use the Begin and End fields to define the work order range for which to search. Leave the End WO Code field blank to search for only the work order entered in the Begin WO Code field. Leave the Begin WO Code field blank to search for all work orders up to and including the End WO Code value provided.



Due Date Range – Use the calendars in the Begin and End date fields to define the date range range for which to search work orders. Leave the End Due Date field blank to search for all work orders due on the Begin Due Date entered. Leave the Begin Due Date field blank to search for all work orders up to and including the End Due Date value provided.

When searching for work orders, use any combination of WO Code range and/or Due Date range as needed. Leaving all WO code range and Due Date range fields blank will return all work orders for the selected customer(s) throughout history.

Search – Press the **<Search>** button after setting the search parameters to return all appropriate work orders that meet the search criteria (Fig. 18).





If the work order has been serviced on site and signed for, the signature will appear at the left.

Work Order detail appears at the right

Detail Report

Click in the <u>**Detail Report**</u> option to view the work order detail report. This is similar to the work order report that is previewed after submitting a work order on the web. Select the format with which to preview the work order detail report (Fig. 19).

Detail Report		
Report Type		
PDF		~
	Print	Close



The default format is PDF. Select either PDF, Image, Word, Excel or HTML formats. Press **<Print>** to preview the work order detail report in the selected format (Fig. 20).



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records.



Fig. 20

The work order detail report includes details for service address and date, relevant service notes entered, services performed, extra material collected, seal barcodes scanned, dump bin processes performed, and calculated bin or work order weight, when applicable. Driver, customer and/or manager signatures and the date/time that the signature was collected as well as any appropriate Certificate of Destruction verbiage are all printed on the report, when available.

Delivery Receipt

Click in the <u>Delivery Receipt</u> option to view a copy of the delivery receipt, after service has been performed and the scan data has been uploaded. Select the format with which to preview the delivery receipt (Fig. 21).

Delivery Receipt	
Report Type	
PDF	
	Print Close
	Close



The default format is PDF. Select either PDF, Image, Word, Excel or HTML formats. Press **<Print>** to preview the delivery receipt in the selected format (Fig. 22).



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records.



15.56	Delivery Receipt DHS Workdwide Records Management Center Work Order: 8099826					
	Bin Dump L00000103 L00000103	SEAL00123	2015/10/23 17:20 2015/10/23 17:20			
	Number of Items: 2	Ale	and the second se			
	_	Signatu	re			

Fig. 22

The delivery receipt report will provide a summary of services provided. Customer signature is printed on the report, when available.

Invoice Report

Select the *Reports > Invoice Reports* menu option to search for invoices, re-print/print reports that have PDF images attached. Credit card payments can be applied to an invoice, when applicable (Fig. 23).

FileBRIDGE [®] records.									
Home	Search 👻	Add	Pick Up Request	Service / Material	Vault Management	Service Bin	Reports 👻	Admin 👻	Help
Invoice	Search								
Customer									
All Custor	mers			~					
Department									
				~					
Begin Date		E	nd Date						
Begin Invoi	te	E	ind Invoice						
Show on	ly invoices with	a balance	e due						
		Sear	th						



Customer – If needed, select the appropriate customer for printing or previewing invoice reports. Use the <All Customers> option to search across all customers to which the web user has access.

Department – If the Customer selected is departmentalized, use the Department dropdown menu to select the appropriate department.

Invoice Date Range – Use the calendars in the Begin and End date fields to define the date range for which to search invoices. Leave the End Date field blank to search for all invoices due on the Begin Due Date entered. Leave the Begin Due Date field blank to search for all work orders up to and including the End Due Date value provided.

Invoice Range – Use the Begin and End fields to define the invoice range for which to search. Leave the End Invoice field blank to search for the only the invoice entered in the Begin Invoice field. Leave the Begin Invoice field blank to search for all invoices up to and including the End Invoice value provided.





Search – Press the **<Search>** button after setting the search parameters to return all appropriate invoices that meet the search criteria (Fig. 24).

	RIDGE [®] cords.			All Customers	Time Items On Order (18)
Home Search -	Add Pick Up Request	Service	/ Material Vault Management	Service Bin Reports - Admin - Help	
nvoice Search			Showing 1 - 3 of 3		Sort by Invoice #: Oldest
Lustomer All Customers		~	View invoice	Invoice Number: 0017058 Created: 9/30/2008 Customer: ZZZNYM ACCESS DEMO/TEST ACCOUNT - NY METRO Due: \$190.88 Address: DUMMY ACCOUNT / DO NOT BILL	Amount: \$190.88
Department		~	View involce	Invoice Number: 0017244 Created: 10/31/2008 Customer: ZZZNYM ACCESS DEMO/TEST ACCOUNT - NY METRO Due: \$1,099.87 Address: DEMO ACCOUNT / DO NOT BILL	Amount: \$1,099.87
Begin Date	End Date		View invoice	Invoice Number: 0264871 Created: 12/31/2012 Customer: ZZZNYM ACCESS DEMO/TEST ACCOUNT - NY METRO Due: \$65,027.97 Address: Demo Account / Do Not Bill	Amount: \$65,027.97
Begin Invoice	End Invoice				
Show only invoices w	ith a balance due				
	Search				

Fig. 24

Invoices that have PDF images attached will have the View Invoice option at the left.

If credit card payments are possible, the <u>**Pay This Invoice**</u> option is available at the left, as well as the **<Pay All Invoices>** button at the top. For more information on processing credit card payments, please refer to the *Processing Credit Card Payments* Quick Reference Guide

Invoice Report

Click in the <u>View Invoice</u> option to view the invoice report in PDF format (Fig. 25).

Information P 1 877 FileLin	Checkers.			In	voice
RETRIEVEX DEMO ACCOUNT DEMO ACCOUNT / DO NOT BILL		Service Billing Period: 10/31/2008 Date 09/30/2008 Invoice #: 02/07/058 Customer #: 222NYM PO #:			
		Total Amou	nt Due \$190.	.86	
		Total End	losed		
	Retrievex, P.O. Box 415938, Boston, MA 02241-5938 ayment, please reference invoice number 0017058]
QTY BOXE	S SERVICE DESCRIPTION	QUANTITY	RATE	ТАХ	CHARGE
STORAGE					
Storage Period:	09/01/2008 - 09/30/2008				
1	1.2 cu ft - Standard Letter/Legal Box: Pro-Rata	1.20	\$0,2400	Y	0.29
Storage Period:	10/01/2008 - 10/31/2008				
1	Special Collections Library Storage	1.20	\$1.3400	Y	1.61
3	3.6 cu ft - Large Legal Box	10.80	\$0.2400	Y	2.59
2	2.4 cu ft - Large Letter Box	4.80	\$0.2400	Y	1.15
242	1.2 cu ft - Standard Letter/Legal Box	290.40	\$0.2400	Y	69.70
1	Special Collections Storage - Standard Box 1.2 cu ft	1.20	\$2.0800	Y	2.50
Storage Period:	11/01/2008 - 11/30/2008				
1	Special Collections Library Storage	1.20	\$1.3400	Y	1.61
3	3.6 cu ft - Large Legal Box	10.80	\$0.2400	Y	2.59
2	2.4 cu ft - Large Letter Box	4.80	\$0.2400	Y	1.15
242	1.2 cu ft - Standard Letter/Legal Box	290.40	\$0.2400	Y	69.70
1	Special Collections Storage - Standard Box 1.2 cu ft	1.20	\$2.0800	Y	2.50
	Total for STORAGE	618.00			\$155.38
SUPPLIES					
	Case of Storage Boxes - Standard Complete / 25 per case	0.00	\$50.0000	Y	0.00
	Total for SUPPLIES				\$0.00
TRANSPORTAT	ION				
	Standard Transportation	1.00	\$23.0000	Y	23.00
	Total for TRANSPORTATION				\$23.00



The invoice report includes all billable line items for all work orders, services and applicable storage charges.

