FileBRIDGE® records.

Overview

Total Recall Envision Client Web application is a faster, smarter client web interface for customers to use when managing vault inventory and requesting delivery and pickup services. The Vault Management features will permit users to manage vault items by creating work orders for adding, returning and retrieving items as well as for verification of inbound/outbound orders and updating inventory. This Quick Reference Guide will walk through how to utilize these valuable features.

Vault Management

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

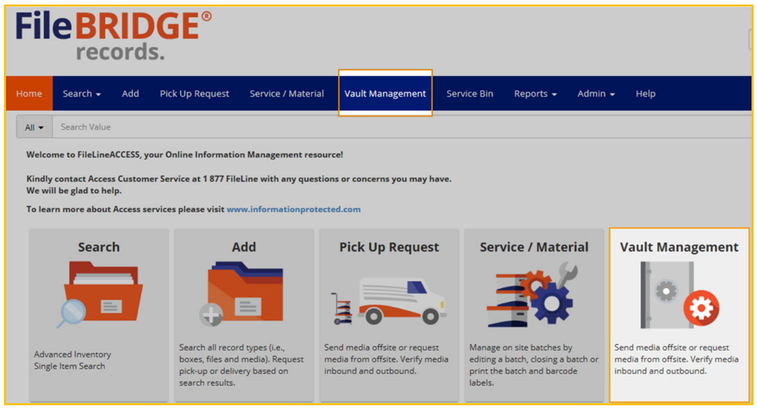


Fig. 1

This will display the Vault Management menu screen (Fig. 2).

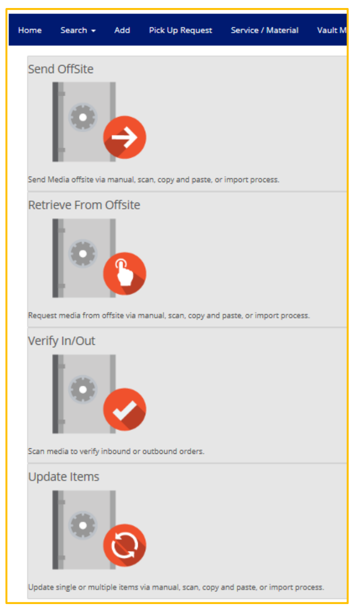


Fig. 2

The Vault Management menu screen is used to send vault inventory offsite to the vault facility (used for adding new items or returning existing items in inventory), request delivery of vault items from the facility, verify work order line items returned from the vault facility or going out to the facility for storage as well as updating existing items in inventory.

Use the dropdown menu at the top right corner, below the logged in user name, to select the appropriate account for which the vault inventory should be managed in the current web session, if applicable (Fig. 3).

Fig. 3

Send Items Offsite

The **<Send Offsite>** button is used to refile existing inventory items or to add new items to inventory (Fig. 4).

Fig. 4

The Send Offsite screen can be used to simply type in VOLSER numbers or scan VOLSER barcodes to build a list of items to be sent to the offsite vault facility (Fig. 5).

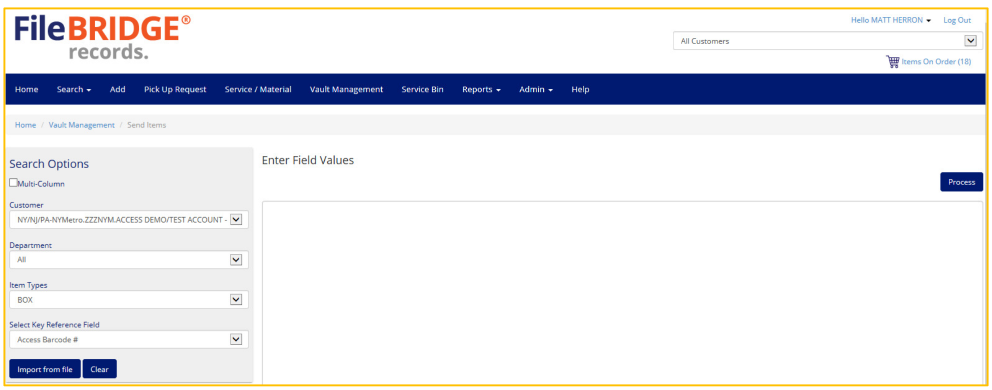


Fig. 5

Send Offsite: Single-Column Mode Search

The simplest way to build a list of items to be sent to the offsite storage facility is to enter the Search Options at the left, set a default Expire Date for the vault items to be sent to the storage facility (to determine the date on which the tapes should be returned, if applicable) and enter the VOLSER numbers in the box provided. VOLSERs can be typed or scanned with a keyboard wedge scanner, as needed.

Use the **Search Options** section at the left to define the following search parameters for processing the current Send Offsite request:

Customer – Select the appropriate customer account for which items will be returned or added during the current web session.

Department – Select the appropriate department for which items will be returned or added during the current web session, if applicable.

Item Type – Select the appropriate type of media to be processed during the current web session, if applicable.

Select Key Reference Field – Select the appropriate search field to use for selecting items to be processed on the web, usually this is the VOLSER number, or other identifier.

Yes, input is by scanning – Put a check in this box to indicate that barcodes will be scanned using a keyboard wedge scanner to create the list of inventory to be processed.

In the **Enter Field Values** section a right, use the calendar to set an appropriate Expiration Date by clicking on the date field (Fig. 6).

Fig. 6

Please Note: *Date formats in the system are defined at the vault management facility. A default Expiration Date can also be set at the vault management facility, as needed.*

Use the box provided to enter a list of inventory to be sent to the offsite vault management facility (Fig. 7).

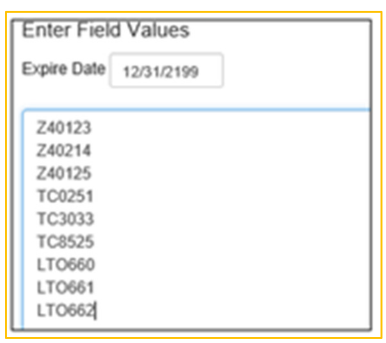


Fig. 7

The list of items can either be manually typed in or scanned with a keyboard wedge scanner by using the **Yes, input is by scanning** option in the Search Options at the left.

Single-Column Mode – Import from File

Instead of typing a list of items to be sent offsite to the vault management facility, use the **<Import from File>** button in the Search Options section to open the Import From File screen (Fig. 8).

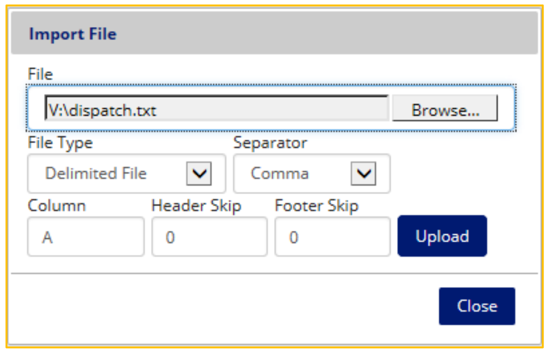


Fig. 8

Browse – Press the **<Browse>** button to locate the delimited text file on the workstation for import.

Separator – Use the dropdown menu provided to select the appropriate column separator character for the data file selected. Select either ***Comma***, ***Tab***, or ***Pipe***, as needed.

Column – Indicate the column in the data file in which the key reference field is located.

Header Skip – Indicate how many full lines from the top of the data file should be skipped when processing the file (*i.e.* lines containing report name, date, time, page number, *etc.*).

Footer Skip – Indicate how many full lines from the bottom of the data file should be skipped when processing the file (*i.e.* lines containing report name, date, time, page number, *etc.*).

Press the **<Upload>** button to import the data file and display the results in the search list.

Send Offsite: Multi-Column Mode Search

The Mufti-Column option in the Search Options section of the Send Offsite process enables the use a list of line items containing multiple columns. Line items can be typed directly in to the list box provided, copied from a source data file and pasted into the list box or imported from a text file data source. To enable multi-column mode, put a check in the ***Multi-Column*** box at the top of the Search Options section (Fig. 9).

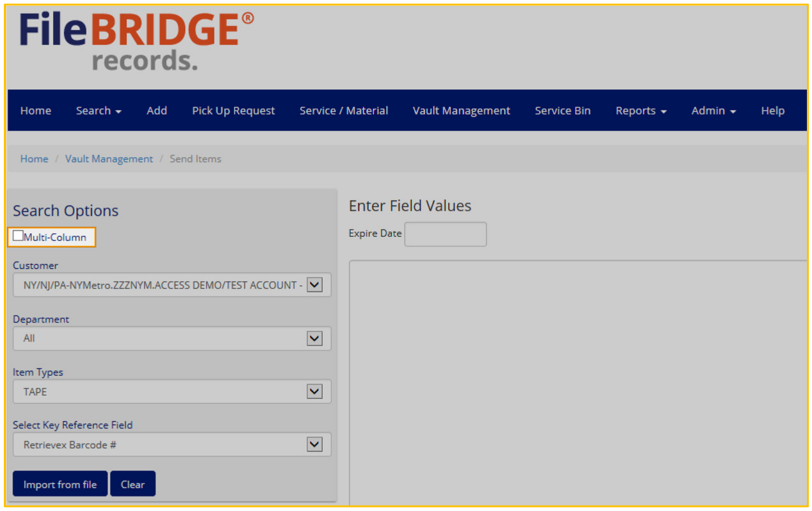


Fig. 9

Customer – Select the appropriate customer account for which items will be returned or added during the current web session.

Department – Select the appropriate department for which items will be returned or added during the current web session, if applicable.

Item Type – Select the appropriate type of media to be processed during the current web session, if applicable.

Line items can be typed, pasted or imported into the list box accordingly (Fig. 10).

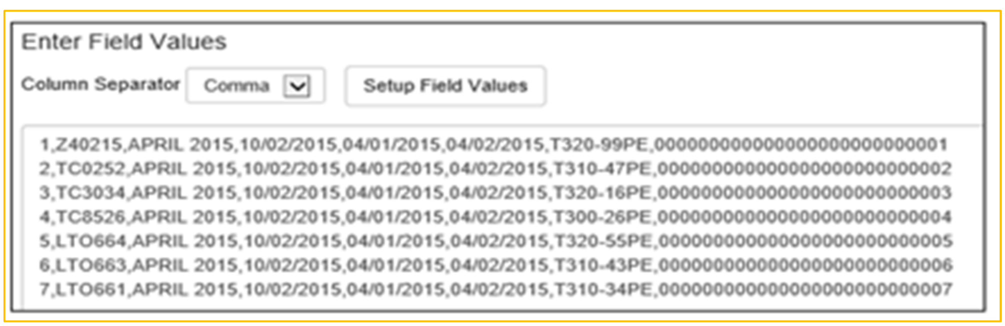


Fig. 10

The Enter Field Values section contains to determine the column separator found in each line item and the provided interface for defining the field values/column mapping (Fig. 11).

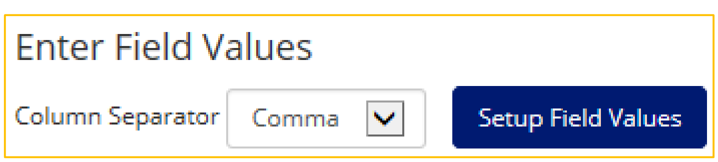


Fig. 11

Column Separator – Use the dropdown menu provide to select the appropriate column separator character for the line item. Select either ***Comma***, ***Tab***, or ***Pipe*** as needed.

The **<Setup Field Values>** button is used to map the column in each line item with relevant reference information for the new or existing item in inventory (Fig. 12).

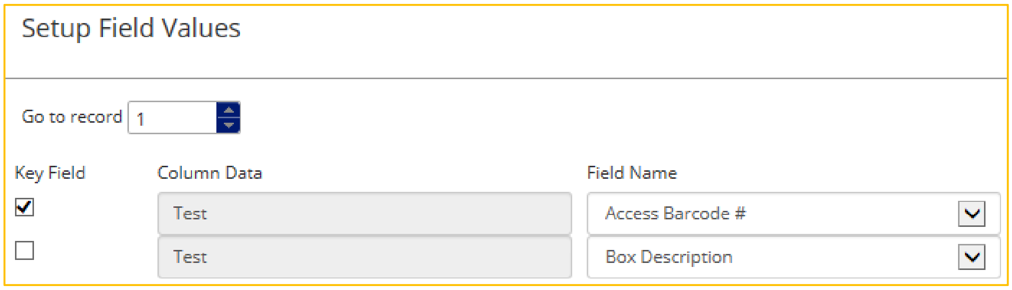


Fig. 12

Go to Record – Use the box provided to scroll though the line items, as needed. The Column Data field will display the text value for each column found in the selected line item accordingly.

Key Field – Select the appropriate search field to use for selecting items to be processed on the web, usually this is the VOLSER number, or other identifier. The Key field is automatically selected when Item Code or VOLSER (Reference 1) is selected. Only one (1) column per line can be marked as the Key Field at a time, but a Key field ***must*** be defined.

Column Data – Displayed the text date in the column for the line selected.

Field Name – Use the dropdown field provided to select the appropriate reference field available for the item type. Any/all data found in this column for each line item will be mapped to the selected reference field.

Date Format – if the Field Name selected is a date filed in the system, select the appropriate date format build in the system for this date field.

For any column that should ***not*** be used during the search process at this time, select the *Ignore* option when defining the Field Name.

Multi-Column Mode – Import from File

Use the **<Import from File>** button in the Search Options section to open the Import From File screen (Fig. 13).

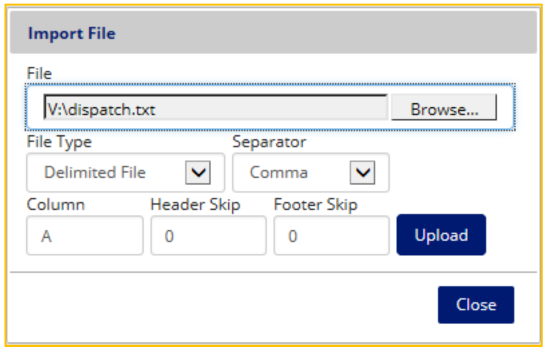


Fig. 13

Browse – Press the <**Browse**> button to locate the delimited text file on the workstation for import.

Separator – Use the dropdown menu provided to select the appropriate column separator character for the data file selected. Select either ***Comma***, ***Tab***, ***Pipe*** or define a ***Custom*** delimiter, as needed.

Column – Leave this value blank to import all columns in the data file; or enter a value in the field provided to define only the single column to be imported from the data file at this time.

Header Skip – Indicate how many full lines from the top of the data file should be skipped when processing the file (*i.e.* lines containing report name, date, time, page number, *etc.*).

Footer Skip – Indicate how many full lines from the bottom of the data file should be skipped when processing the file (*i.e.* lines containing report name, date, time, page number, *etc.*).

Press the <**Upload**> button to import the data file and display the results in the search list.

Request From Offsite

The **<Request from Offsite>** button is used to request the delivery of existing inventory items from the vault management facility (Fig. 14).

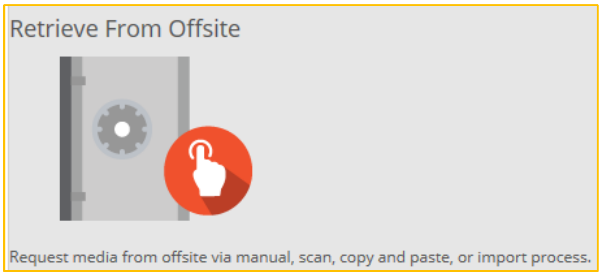


Fig. 14

The Request Items screen can be used to simply type in VOLSER numbers or scan VOLSER barcodes to build a list of items to be sent to the offsite vault facility (Fig. 15).

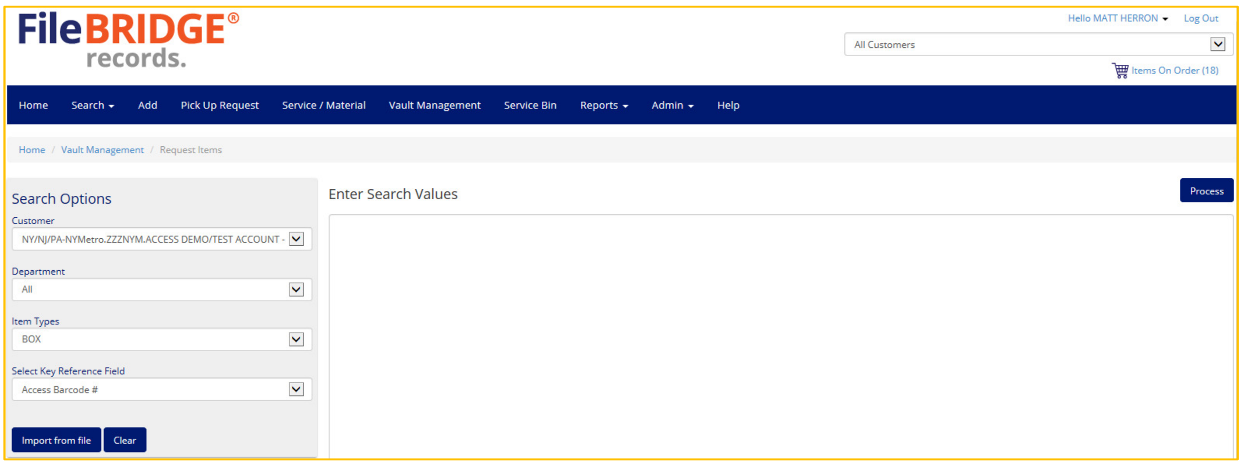


Fig. 15

Use the **Search Options** section at the left to define the following search parameters for processing the current request.

Customer – Select the appropriate customer account for which items will be returned or added during the current web session.

Department – Select the appropriate department for which items will be returned or added during the current web session, if applicable.

Item Type – Select the appropriate type of media to be processed during the current web session, if applicable.

Select Key Reference Field – Select the appropriate search field to use for selecting items to be processed on the web, usually this is the VOLSER number, or other identifier.

Yes, input is by scanning – Put a check in this box to indicate that barcodes will be scanned using a keyboard wedge scanner to create the list of inventory to be processed.

Use the box provided to enter a list of inventory to be requested from the offsite vault management facility (Fig. 16).

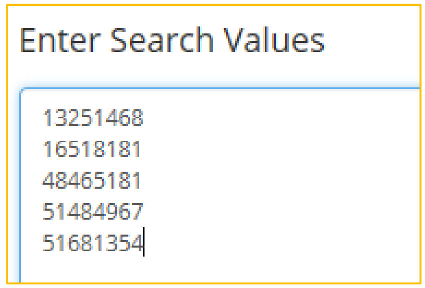


Fig. 16

The list of items can either be manually typed in or scanned with a keyboard wedge scanner by using the **Yes, input is by scanning** option in the Search Options at the left.

Request from Offsite – Import from File

Instead of typing a list of items to be sent offsite to the vault management facility, use the **<Import from File>** button in the Search Options section to open the Import From File screen (Fig. 17).

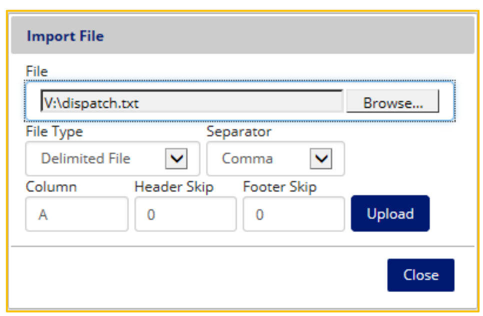


Fig. 17

Browse – Press the **<Browse>** button to locate the delimited text file on the workstation for import.

Separator – Use the dropdown menu provide to select the appropriate column separator character for the data file selected. Select either ***Comma***, ***Tab***, or ***Pipe***, as needed.

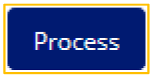
Column – Indicate the column in the data file in which the key reference field is located.

Header Skip – Indicate how many full lines from the top of the data file should be skipped when processing the file (*i.e.* lines containing report name, date, time, page number, *etc.*).

Footer Skip – Indicate how many full lines from the bottom of the data file should be skipped when processing the file (*i.e.* lines containing report name, date, time, page number, *etc.*).

Press the **<Upload>** button to import the data file and display the results in the search list.

Send / Request Search Results



After building the list of items to be processed, press the **<Process>** button in the top right corner to continue with the Send Offsite / Request from Offsite order. This will display the Search Results page (Fig. 18).

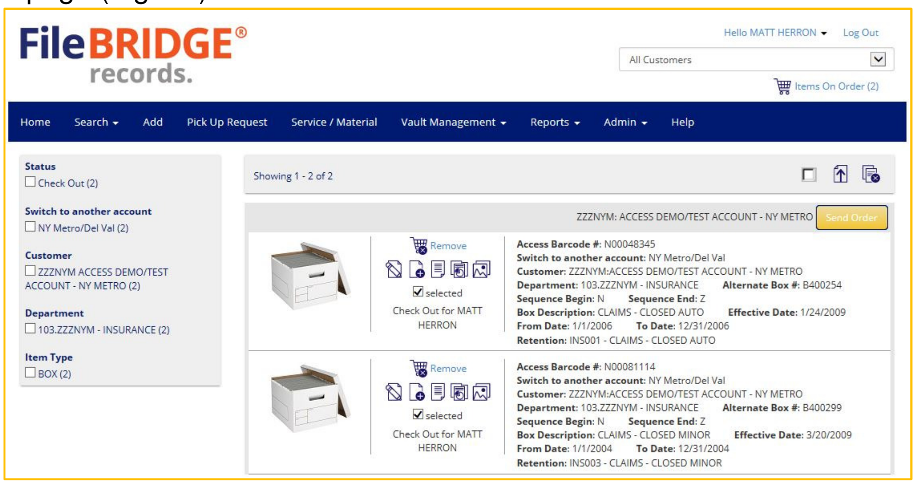


Fig. 18

Use the search results page to verify the actions expected to be performed when sending items offsite to the vault management facility (items to be added to inventory, existing items to be refiled, etc.).

If any changes need to be applied to the original item search, use the menu above the search results to navigate the Envision Client Web application back to the previous step instead of using the **<Back>** button in the internet browser (Fig. 19).

Fig. 19

Please Note: *The Send Offsite feature of the Envision Client Web application is designed to search for and locate* **exact** *matches for existing items in inventory using the search criteria entered. If an exact match is not found, the Send Offsite feature is designed to add the new item to inventory. Please review the Search Results carefully before continuing through the Send Offsite process.*

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 requested activity (Refile/Add), customer account, department (if applicable), item types, *etc.* (Fig. 20).

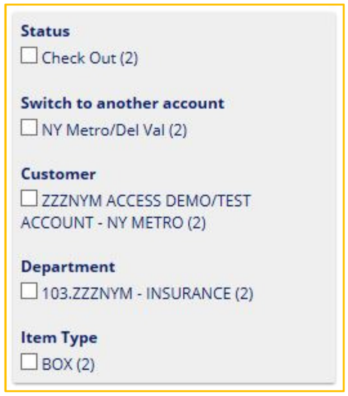


Fig. 20

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

Global Edit – If permissions to the Envision Client Web application allow, use the Global Edit option to update all items of an Item Type with the same reference field, description and/or date values, as needed (Fig. 21).

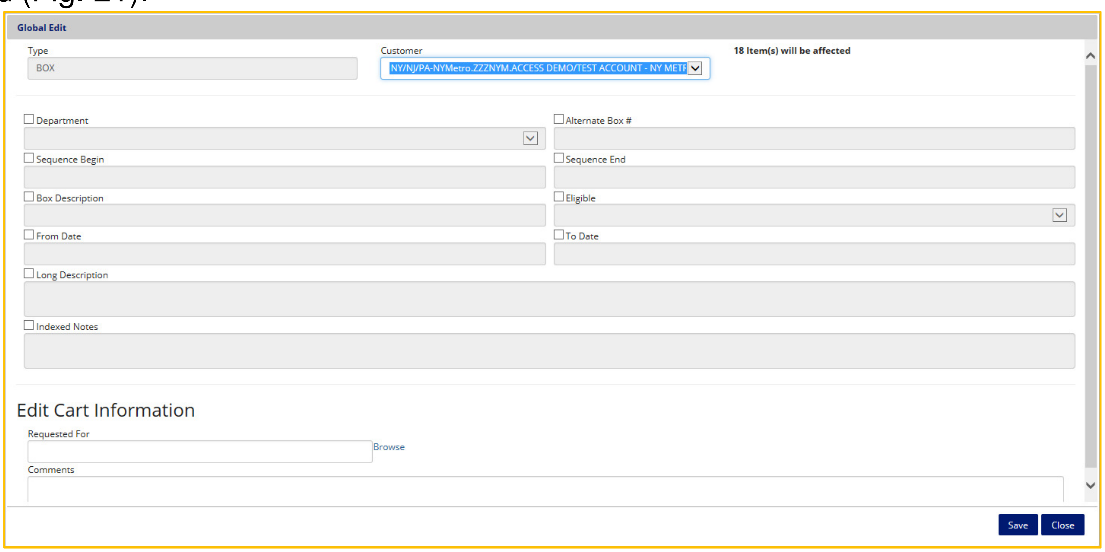


Fig. 21

The Global Edit screen will display all the available reference fields and date fields that are editable for that Item Type in the Envision Client Web application. Put a check in the box next to the name of the field to be edited, then enter the value for that field to be applied to all items of the type indicated. Shopping cart information, such as the name of the individual who is requesting the action (Requested For) as well as any relevant notes for each item (Comments).

Press the **<Save>** button to update all items of this type with the information entered on the Global Edit screen and return to the Search Results list. Pressing **<Close>** will exit the Global Edit screen without saving any changes to the items in the Search Results screen at this time.

The action menu provided for each line item in the Search Results screen can be used to provide current inventory information, requested action description, requestor name and an option to remove the line item from the search results (Fig. 22).

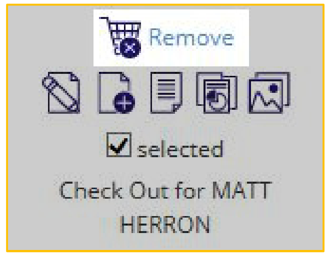
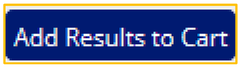


Fig. 22

Remove – Use the Remove option to remove the line item from the search results. This item, if removed from the list, will not be processed further.

Submitting the Web Order



Once all line items in the list have been verified, use the **<Add Results to Cart>** button to add all the results listed in the Search Results screen to the shopping cart at this time.

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. 23).

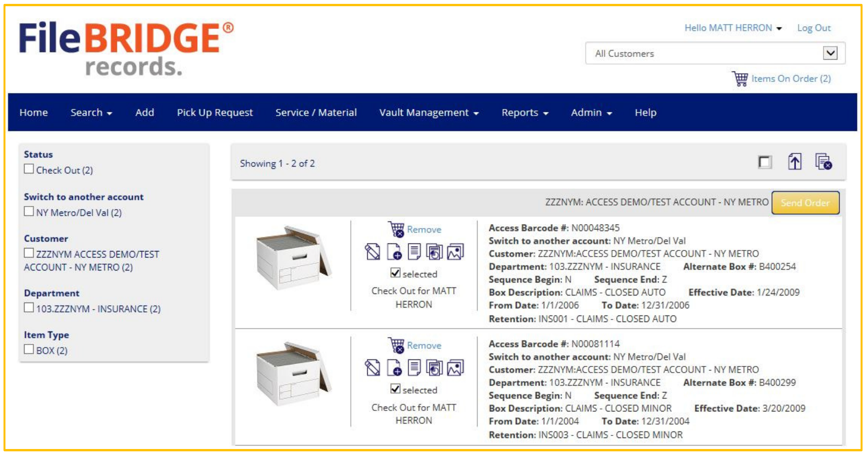


Fig. 23

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. 24).

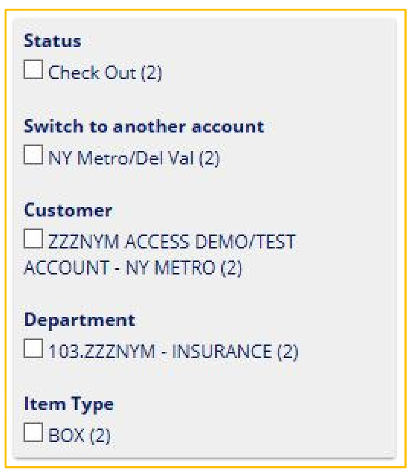


Fig. 24

Use the action menu to select the appropriate action for the appropriate record in the search results (Fig. 25).

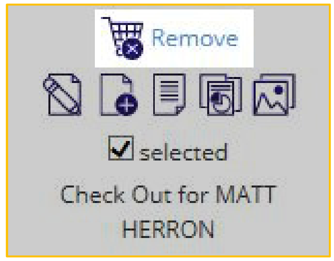


Fig. 25

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 available reference fields, notes and/or dates for the item in inventory, as needed. The Edit Item screen will be displayed (Fig. 26).

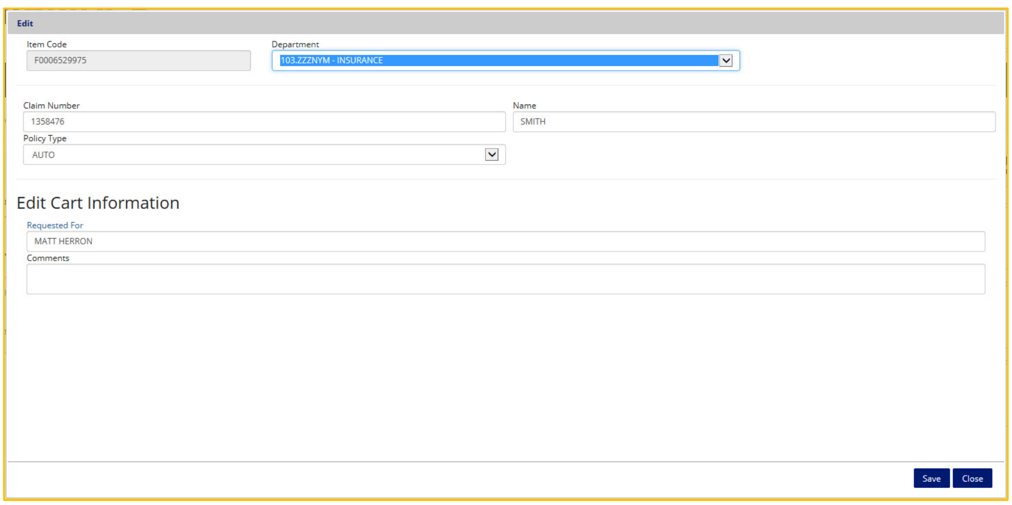


Fig. 26

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.

Use the **<Remove All>** button to remove all listed items from the shopping cart, if needed (Fig. 27).

FileBRIDGE records.

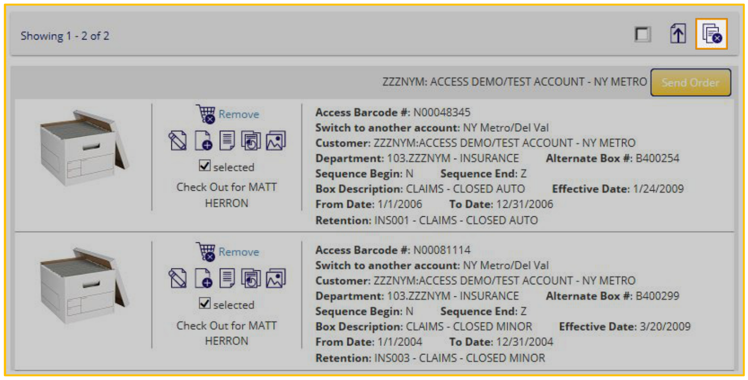


Fig. 27

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. 28).

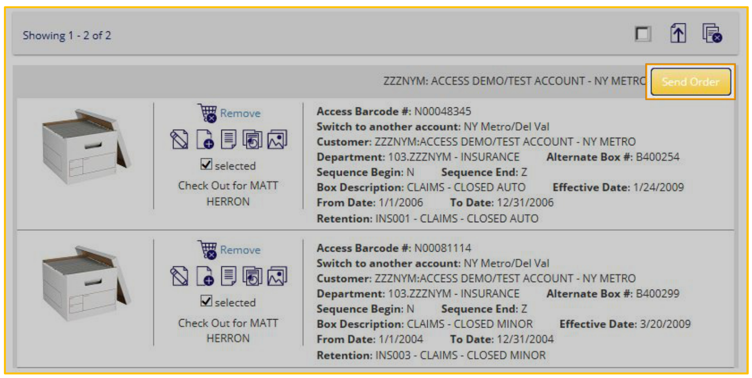


Fig. 28

The Send Order screen will appear (Fig. 29).

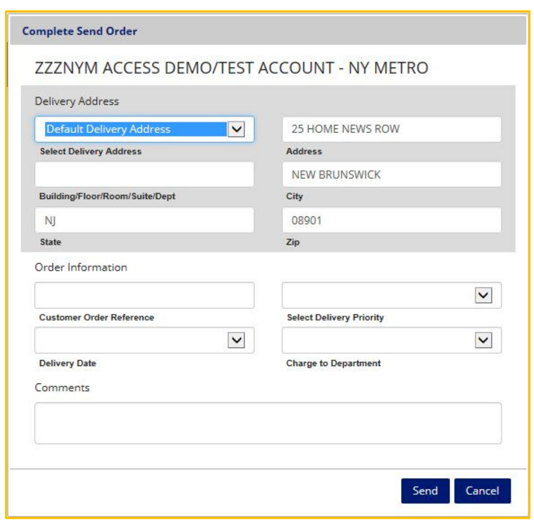


Fig. 29

Access Information Protected.

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. 30).

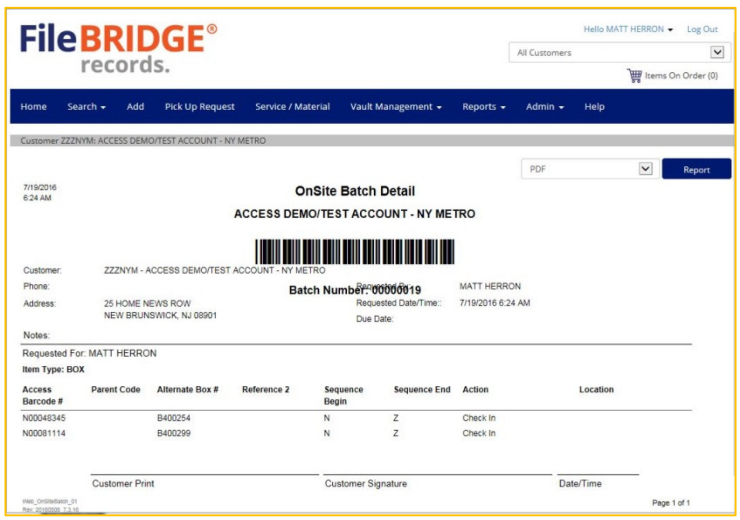


Fig. 30

Verify In/Out

The **<Verify In/Out>** button is used for verifying inventory items recently received from the offsite vault management facility as well as for verifying items to be sent offsite to the vault management facility (Fig. 31).

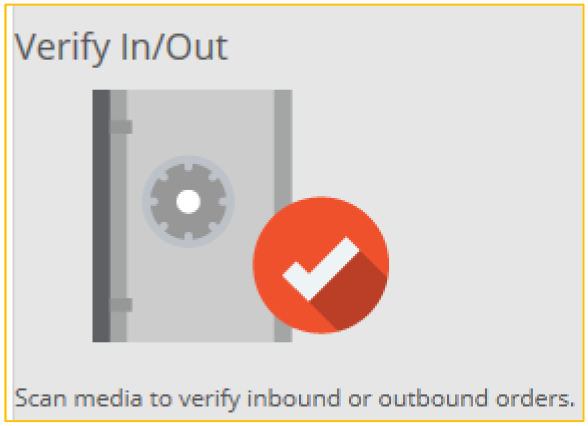


Fig. 31

The Request Items screen can be used to simply type in VOLSER numbers or scan VOLSER barcodes to build a list of items to be sent to the offsite vault facility (Fig. 32).

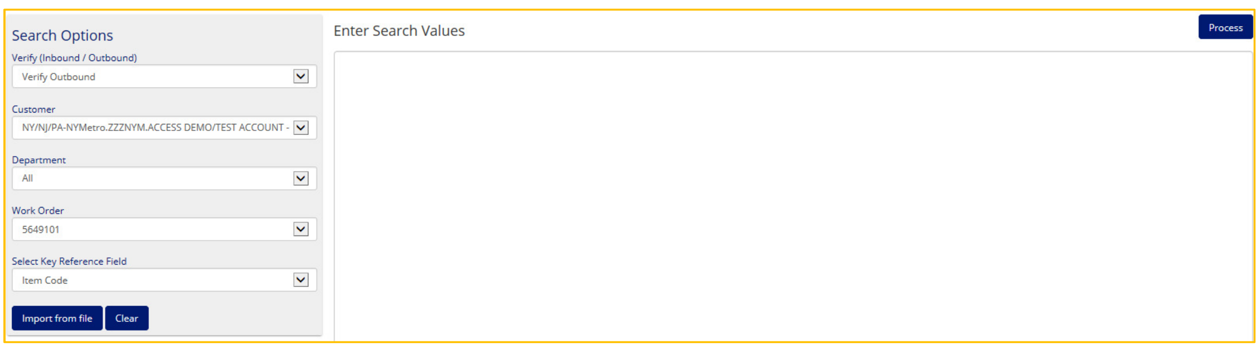


Fig. 32

The Request Items screen can be used to simply type in VOLSER numbers or scan VOLSER barcodes to build a list of items to be sent to the offsite vault facility.

Use the **Search Options** section at the left to define the following search parameters for processing the current Send Offsite request:

Customer – Select the appropriate customer account for which items will be returned or added during the current web session.

Department – Select the appropriate department for which items will be returned or added during the current web session, if applicable.

Item Type – Select the appropriate type of media to be processed during the current web session, if applicable.

Select Key Reference Field – Select the appropriate search field to use for selecting items to be processed on the web, usually this is the VOLSER number, or other identifier.

Yes, input is by scanning – Put a check in this box to indicate that barcodes will be scanned using a keyboard wedge scanner to create the list of inventory to be processed.

Use the box provided to enter a list of inventory to be requested from the offsite vault management facility (Fig. 33).

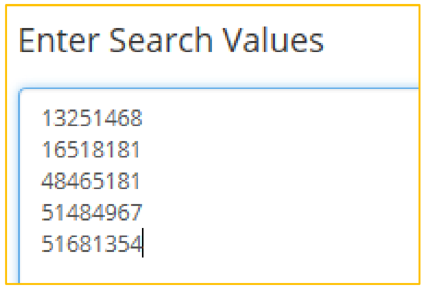


Fig. 33

The list of items can either be manually typed in or scanned with a keyboard wedge scanner by using the **Yes, input is by scanning** option in the Search Options at the left.

Verify – Import from File

Instead of typing a list of items to be verified, use the **<Import from File>** button in the Search Options section to open the Import From File screen (Fig. 34).

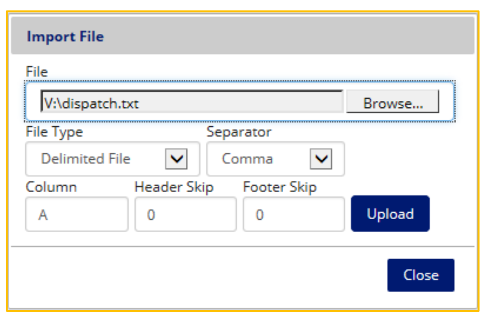


Fig. 34

Browse – Press the **<Browse>** button to locate the delimited text file on the workstation for import.

Separator – Use the dropdown menu provided to select the appropriate column separator character for the data file selected. Select either ***Comma***, ***Tab***, or ***Pipe***, as needed.

Column – Indicate the column in the data file in which the key reference field is located.

Header Skip – Indicate how many full lines from the top of the data file should be skipped when processing the file (*i.e.* lines containing report name, date, time, page number, *etc.*).

Footer Skip – Indicate how many full lines from the bottom of the data file should be skipped when processing the file (*i.e.* lines containing report name, date, time, page number, *etc.*).

Press the **<Upload>** button to import the data file and display the results in the search list.

Verify Results

After building the list of items to be verified, press the **<Process>** button in the top right corner to continue with the Verify request. This will display the Verify Report screen (Fig. 35).

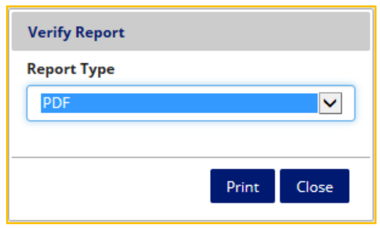
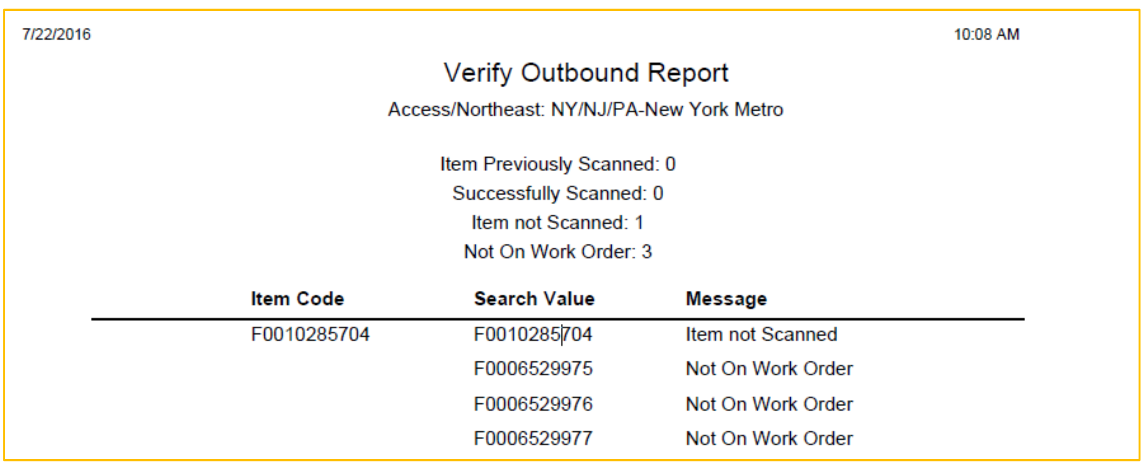


Fig. 35

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. 36).



7/22/2016 10:08 AM

Verify Outbound Report

Access/Northeast: NY/NJ/PA-New York Metro

Item Previously Scanned: 0
Successfully Scanned: 0
Item not Scanned: 1
Not On Work Order: 3

Item Code	Search Value	Message
F0010285704	F0010285704	Item not Scanned
	F0006529975	Not On Work Order
	F0006529976	Not On Work Order
	F0006529977	Not On Work Order

Fig. 36

The Verify Report will list all items typed, scanned, pasted or otherwise listed in the Field Values section of the Verify screen and indicate which items were ***Successfully Scanned*** (*i.e.* included on the verify screen and found on the work order), and report ***Items not Scanned*** (*i.e.* listed on the work order but not included on the Verify screen) as well as any items ***Not on Work Order*** (included in the verify list, but not on the original work order).

Update Items

The **<Update Items>** button is used for updating existing inventory in the system. Dates, descriptions and other reference field values (accessible on the web) can be updated on this screen (Fig. 37).

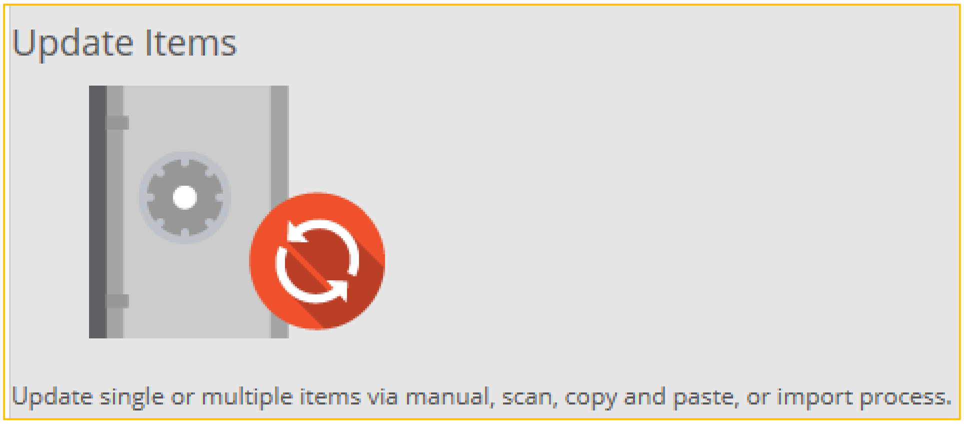


Fig. 37

Use the **Search Options** section at the felt to define the following search parameters for processing the current Send Offsite request (Fig. 38).

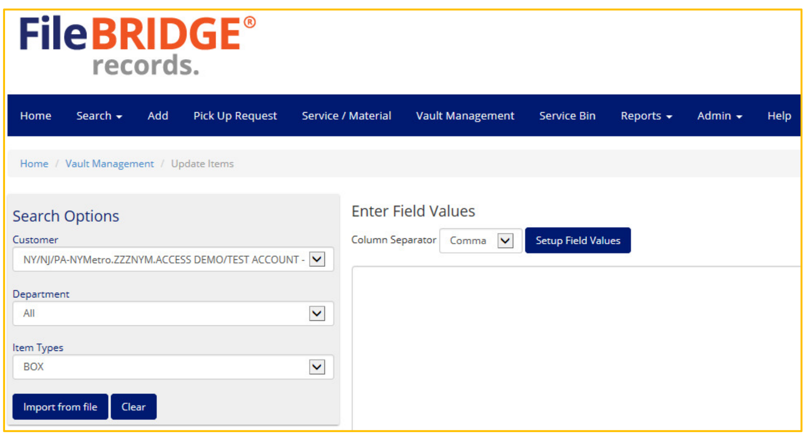


Fig. 38

Customer – Select the appropriate customer account for which items will be returned or added during the current web session.

Department – Select the appropriate department for which items will be returned or added during the current web session, if applicable.

Item Type – Select the appropriate type of media to be processed during the current web session, if applicable.

Use the box provided to enter a list of inventory to be updated. The list of items can either be manually typed in or copied from a source text file and pasted into the field.

Update – Import from File

Instead of typing a list of items to be updated in inventory, use the **<Import from File>** button in the Search Options section to open the Import From File screen (Fig. 39).

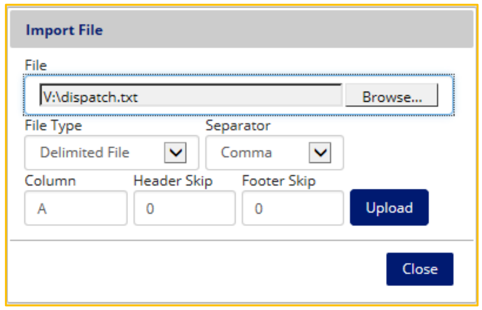


Fig. 39

Browse – Press the **<Browse>** button to locate the delimited text file on the workstation for import.

Separator – Use the dropdown menu provided to select the appropriate column separator character for the data file selected. Select either ***Comma***, ***Tab***, or ***Pipe***, as needed.

Column – If only one (1) field should be imported from the source data file, indicate the column in which the key reference field is located. Only the column indicated will be imported. Leave this column blank to import all columns.

Header Skip – Indicate how many full lines from the top of the data file should be skipped when processing the file (*i.e.* lines containing report name, date, time, page number, *etc.*).

Footer Skip – Indicate how many full lines from the bottom of the data file should be skipped when processing the file (*i.e.* lines containing report name, date, time, page number, *etc.*).

Press the **<Upload>** button to import the data file and display the results in the search list.

Setting Field Values

Once the data has been typed, pasted, imported or otherwise entered into the box provided, the field values can be defined to determine which reference fields should be updated and which columns in the source data should be ignored accordingly (Fig. 40).

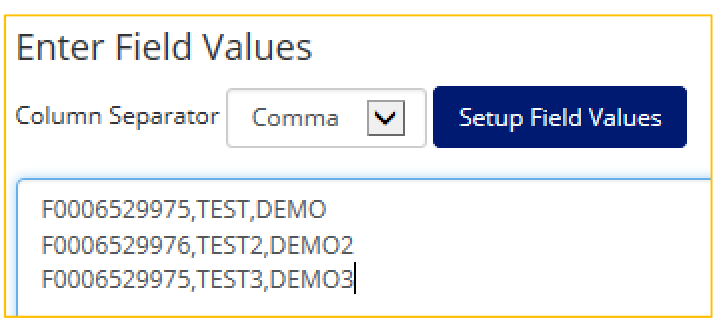


Fig. 40

The Enter Field Values section contains the column separator found in each line item and the provided interface for defining the field values/column mapping (Fig. 41).

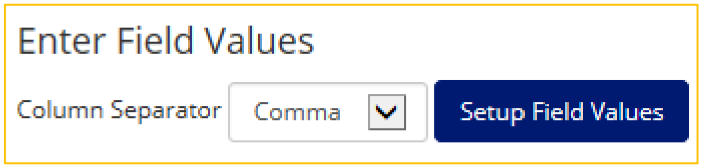


Fig. 41

Column Separator – Use the dropdown menu provided to select the appropriate column separator character for the line item. Select either ***Comma***, ***Tab***, or ***Pipe*** as needed.

The **<Setup Field Values>** button is used to map the column in each line item with relevant reference information for the new or existing item in inventory (Fig. 42).

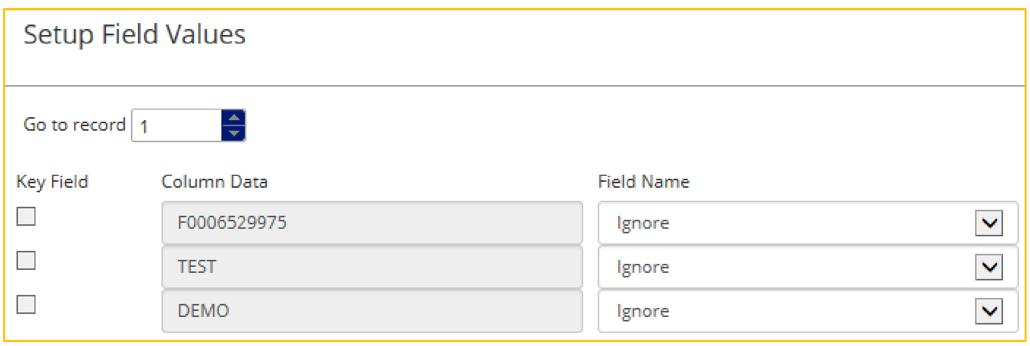


Fig. 42

Go to Record – Use the box provided to scroll through the line items, as needed. The Column Data field will display the text value for each column found in the selected line item accordingly.

Key Field – Select the appropriate search field to use for selecting items to be processed on the web, usually this is the VOLSER number, or other identifier. The Key field is automatically selected when Item Code or VOLSER (Reference 1) is selected. Only one (1) column per line can be marked as the Key Field at a time, but a Key field ***must*** be defined.

Column Data – Displays the text date in the column for the line selected.

Field Name – Use the dropdown field provided to select the appropriate reference field available for the item type. Any/all data found in this column for each line item will be mapped to the selected reference field.

Date Format – If the Field Name selected is a date field in the system, select the appropriate date format build in the system for this date field.

For any column that should ***not*** be used during the search process at this time, select the *Ignore* option when defining the Field Name.

Update Search Results

After building the list of items to be updated, press the **<Process>** button in the top right corner to continue with the item update order. This will display the Search Results page (Fig. 43).

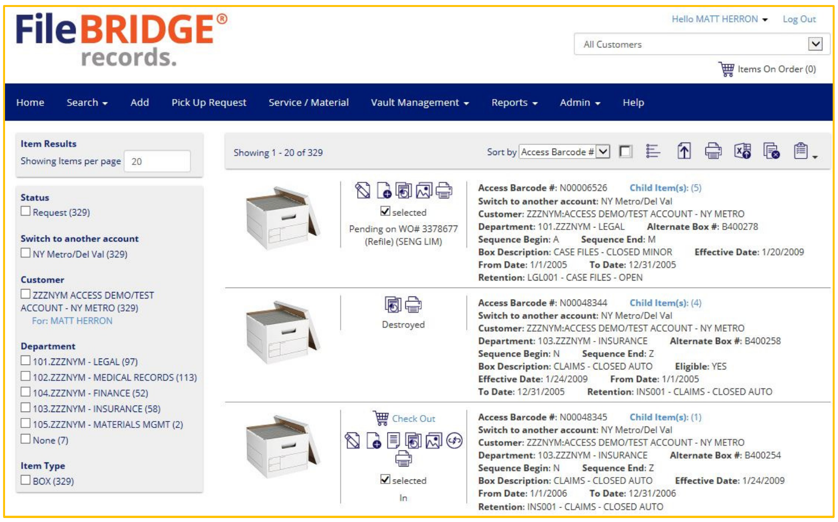


Fig. 43

Use the search results page to verify the values expected to be updated.

The search results screen can be used just like the Send Offsite / Request from Offsite search results screen to edit items, remove items from the list and perform global updates, if applicable.

Use the **<Process List>** button to update all the results listed in the Search Results screen.