REVISION 11.12.15



INFORMATION AND RECORDS MANAGEMENT SOLUTIONS

SECURE STORAGE PORTAL USER GUIDE



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1 Introduction

This User Guide is provided to assist in educating HCDE Records Management Clients on how to use the Secure Storage Portal web-based inventory management system found at

rms.hcde-texas.org.

Our Secure Storage Portal represents the records and information management industry's most comprehensive solution and best practices, defining all the ways we interact and everything we do together to manage your information.

Our exclusive customer web database offers you individuallydesigned information management. It helps you save time and increase accuracy by requesting inventory through easy to use and secure online access. Any internet connection will enable you to access your inventory and activity. You have access to view the live status of requests, reports, receipts, and invoices.



2 Login Instructions

To access our Secure Storage Portal, navigate to

rms.hcde-texas.org



Security Control Form

Please Log-In

User ID	
Password	
	Log In Clear

• Type in your User ID and Password where indicated, and click Log In. Authorized users will be given a username and password. Your username and password will have been set up to allow you to access certain groups of records as well as certain Secure Storage Portal functions.



Please note, a separate workorder is necessary for each individual Delivery Priority.

3 Database Searching / Delivery Request

Now that your records are safely stored in HCDE Records Management, you can use our Secure Storage Portal to search your stored inventory, and submit requests to have items delivered back to your facility.

To begin a search of the database, choose **Quick Search/Request** from the **Search** menu.



Click here to email us your attachment.

Use the data field boxes to input your search criteria, that is, HCDE Box #, HCDE File #, Alternate, and so on.

Click on t	he Search button in	the command	bar to run y	our searc	h.
HARRIS COUNTY DEPARTMEN	Search User A	Add Reports Help L	.og Out		
Current Customer HARRIS COU	NTY DEPT OF ED Current User JANE DOE				
Quick Search Criteria					
Item Type Departme BOX ▼	nt IS MGMT - RECORDS MANAGEMENT	Order By Barcode	Requested For JANE DOE	Page S 20	Size
Search Fields (BOX)					
Barcode Customer Box	<pre></pre>	From Date	To Date	Description	Expire Date 1
Command Bar					
Clear Input Search New Se	arch Import from file Clear Results	Select All View Order			
F				\sim	5

Your search results will display in the Results section.

	Heln Log Out			
HARRIS COUNTY DEPARTMENT OF EDUCATION Current Customer HARRIS COUNTY DEPT OF ED Current User JANE DOE			Items Matched: (1) Items	s On Order: (0) (HCDE)
Item Type Department Order E BOX RECORDS MGMT - RECORDS MANAGEMENT Barco	3y Requested For Pa de ▼ JANE DOE 20	ge Size		
Barcode Customer Box # Years In Box Box Index From Date	To Date Description	Expire Date 1		
Clear Input Search New Search Import from file Clear Results Select All View	/ Order			
Results Display Long Description Excel Export - All / Page Text Export - All / Page Requested /	Action () Delivery () Pick Up () Remove			
Select Detail Barcode Customer Box # Years In Box	Item Type Box Index P	? = BOX From Date To Date	Description	Department
□ + □ 000476496 11/13-5/14	COH 0023		INVOICE BACK UP	RECORDS MGMT

To request the box, check off the box under Select. The item will be automatically added to your order, and the status will change to Pending Sending Order.

HARRIS COUNTY DEPARTMENT OF EDUCATION Current Customer HARRIS COUNTY DEPT OF ED Current User JANE DOE	Help Log Out		Items Matched: (1) Iten	is On Order: (1) (HCDE)
Quick Search Criteria Item Type Department Or	der Bv Requested For	Page Size		
BOX T RECORDS MGMT - RECORDS MANAGEMENT	arcode 🔻 JANE DOE	20		
Search Fields (BOX)				
Barcoda Customer Box # Vears In Box Box Index From I	Data To Data Descriptic	n Evnire Date 1		
Command Bar				
Clear Input Search New Search Import from file Clear Results Select All	View Order			
r (=) Results				
Display Long Description Excel Export - All / Page Text Export - All / Page	tad Action 🔘 Daliyany 🔘 Dick Un 🔘 Damay	0		
Keques	Them	c Turne = BOX		
Select Detail Barcode Customer Box # Years In F	ttem Sox Box Index	From Date To Da	te Description	Department
Pending	BOA INCA	10 04	ee boonption	Department
Send				
for 🛉 🛄 🔊 000476496 11/13-5/14	COH 0023		INVOICE BACK UP	RECORDS MGMT
JANE DOE				

Click Viev	w Order(s) within	n the comman	d bar to proceed	d to the nex	t step.	
HARRIS COUNTY DEPARTMENT OF EDUCATION Current Customer HARRIS COUNTY DEPT OF ED CU	Search User Add Reports Help	Log Out			Items Matched: (1) Iter	ns On Order: (1) (HCDE
Quick Search Criteria						
Item Type Department BOX ▼ RECORDS MGMT - RECORDS	MANAGEMENT Order By Barcode	Requested For JANE DOE	Page Size			
Search Fields (BOX)						
Barcode Customer Box # Years In Box 000476496	Box Index From Date	To Date D	escription Expire Date 1			
Command Bar						
Clear Input Search New Search Import from f	ile Clear Results Select All View Or	der				
Results						
Display Long Description Excel Export - All / Page	e Text Export - All / Page Requested Acti	on 🖲 Delivery 🔘 Pick Up 🤇	Remove			
			Item Type = BOX			
Select Detail Barcode Custon Pending Send	ner Box # Years In Box	Box Index	From Date	To Date	Description	Departmen
Order 🕂 🔤 🔊 000476496	11/13-5/14	COH 0023			INVOICE BACK UP	RECORDS MGMT
JANE						

Here, you are able to review your order. If you want to add additional items to your order, return to the Search menu and make the appropriate selection.

When ready, click the **Send Order** button in the command bar.

Search User Add Rep	Help Log Out					
Current Customer HARRIS COUNTY DEPT OF ED Current User JANE DOE				Items Match	ned: (0) Items On Order	: (1) (HCDE)
Command Bar						- (-) ()
Send Order Remove All Refresh						
Tem Requests						
			Item Type = BOX			
Edit Remove Action Barcode Parent Item Code Parent Reference	Customer Box #	Years In Box	Box Index	From Date	To Date	Des
Remove Request 000476496		11/13-5/14	COH 0023			INVOICE B

On this final screen, complete the form by selecting a Delivery Priority identifying your activity.

	plete Send Order to send your order through to Secure Storage Portal.
A HCDI	Search User Add Reports Help Log Out
HARRIS COUNTY DEPARTMENT OF EDUCAL	OF ED. Current User JANE DOE
Command Bar	
Complete Send Order Clear Comments	
Delivery options	
Customer Order Reference	
	court request
Select Delivery Priority	Retrieval & Delivery of Records
Charge to Department	RECORDS MGMT - RECORDS MANAGEMENT
Select Delivery Address	NORTH POST OAK
Address	6005 WESTVIEW
Address	
City	HOUSTON
State	TX
Zip	77055
Comments	Please deliver to room 1073

Your order has now been submitted to the Secure Storage Portal for processing. An order confirmation page will display, which includes your work order number, as well as the date in which your order is due.

HARRIS COUNTY DEPARTMENT OF EDUCATION Current Customer HARRIS COUNTY DEPT OF ED Current	Search User Add Reports Help Log Out
Command Bar	
Detail report in HTML Detail report in PDF Text Exp	bort Excel Export
Order for Customer: Harris County Dept of Ed and web use has been submitted under work order # 1021370,	er: JANE DOE
Order Date	11/16/2015 11:25:19 AM
Your Ref	court request
Deliver To	6005 WESTVIEW HOUSTON, TX 77055
Attention	JANE DOE
Required By	11/17/2015 05:00:00 PM - STND
Dept/Cost Center	RECORDS MGMT
<u>Comments</u>	Please deliver to room 1073

4 View Item History Report



Run a search based on the instructions provided in the previous section of this manual. Once you have identified the item that you would like to view history for click on the

Results-								
Display	y Long Descriptior	Excel Export	- All / Page Text Export - /	All / Page Requested Actior	\bullet • Delivery \circ Pick Up \circ R	emove		
]	Item Type = BOX		
Select	Detail	Barcode	Customer Box #	Years In Box	Box Index	From Date	To Date	Description
Detrieve	🛉 🔛 👂	000476496		11/13-5/14	COH 0023			INVOICE BACK UP

A screen will appear with all of the previous activity of the item, including the previous workorder #s, dates of activity, requestor information, etc.



0041387 Supplies 08/28/2009	
0028346 Supplies 05/12/2008	
0000417 Add	

5 Ordering Non-Indexed Files from a Container

(Files that have not been barcoded)

In order to retrieve a file from a box where the files are not currently individually listed you must first add the file to the box. In order to add a non-indexed file on the Secure Storage Portal website, you must first search for and display the container that you want to add a file to.

To begin a search of the database, choose **Quick Search/Request** from the **Search** menu.



Use the data field boxes to input your search criteria, that is, HCDE Barcode #, HCDE File #, Alternate, and so on.

Click on the **Search** button in the command bar to run your search.





To run a keyword search, enter a % before the keyword, and click **Search**.

*]	HCE)E se	arch User A	Add Reports Help L	og Out			
Current Custome	THARRIS COUNTY D	EPT OF ED Curren	t User JANE DOE					Items Matched: (553)
Quick Search	Criteria-			-				()
Item Type	Department			Order By	Requested	For Page	Size	
BOX	•			▼ Barcode	JANE DOE	20		
Search Fields	(BOX)							
Barcode	Customer Box #	Years In Box	Box Index	From Date	To Date	Description	Expire Date 1	
						%files%		
Command Bar								
Clear Input Se	arch New Search	Import from file	Clear Results	Select All View Order				

Your search results will display in the Results section.

HARR Current Current Current State	IS COUNTY DEPARTM stomer HARRIS CO iearch Criteria	CIDENT OF EDUC OUNTY DEP	Search TOFED Current User	User Add Reports Help	Log Out			Items Matched: (553) Items On (Order: (0) (HCDE
Item Type	Depart	tment		Order By	Requested For	Page Size			
DUX	· · · · · · · · · · · · · · · · · · ·			• Darcoue	JANE DUE	20			
Search	Fields (BOX)								
Barcode	Customer	Box #	Years In Box Box	x Index From Date	To Date Descript	tion Expire Dat	e 1		
- Comma	nd Bar								
Clear Input	Search New	Search I	mport from file Clear	Results Select All View Ord	der				
Results									
< 1 2 3	4 5 > >> 🔲	Display Lon	a Description Excel Ex	port - All / Page Text Export - All	/ Page Requested Action () Dol	ivory O Bick Up O Bo	201/0		
<< 1 2 3	4 5 > >>	Display Lon	g Description Excel Ex	port - All / Page Text Export - All	/ Page Requested Action Del	ivery Pick Up Re	move		
<< 1 2 3 Select	4 5 > >> 📄 Detail	Display Lon	g Description Excel Ex Customer Box #	port - All / Page Text Export - All Years In Box	/ Page Requested Action	ivery OPick Up ORe m Type = BOX From Date	move To Date	Description	Departm
<< 1 2 3 Select	4 5 > >> Detail	Display Lon Barcode	g Description Excel Ex Customer Box #	port - All / Page Text Export - All Years In Box	/ Page Requested Action Del Ite Box Index	ivery Pick Up Re m Type = BOX From Date	move To Date	Description	Departm
<< 1 2 3 Select Retrieve	4 5 > >> 📄 Detail	Display Lon Barcode 000000139	g Description Excel Ex Customer Box # 00120	port - All / Page Text Export - All Years In Box 4/91 - 8/94	/ Page Requested Action Del Del Del Del Action Del Del Action Del Del Comparison Del Del Del Del Del Del Del De	ivery Pick Up Re m Type = BOX From Date	move To Date	Description EARNING RECORDS, EMF	Departm BUSINESS
<< 1 2 3 Select Retrieve	4 5 > >>	Display Long Barcode 000000139	g Description Excel Ex Customer Box # 00120	port - All / Page Text Export - All Years In Box 4/91 - 8/94	/ Page Requested Action Del Del Del Del Del Del Del De	ivery Pick Up Re m Type = BOX From Date	move To Date	Description EARNING RECORDS, EMP	Departm BUSINESS BUSINESS
<< 1 2 3 Select Retrieve Retrieve	4 5 > >> Detail 4 5 > >>	Display Lone Barcode 000000139 000000155	g Description Excel Ex Customer Box # 00120 00242	port - All / Page Text Export - All Years In Box 4/91 - 8/94 1986	/ Page Requested Action Del Del Del Del A-F 6300 BUILDING CONSTRL	ivery Pick Up Re m Type = BOX From Date	To Date	Description EARNING RECORDS, EMF FACILITIES FILES	Departm BUSINESS BUSINESS
<< 1 2 3 Select Retrieve Retrieve	4 5 > >> Detail 4 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	Display Lone Barcode 000000139 000000155 000000607	g Description Excel Ex Customer Box # 00120 00242 00207	port - All / Page Text Export - All Years In Box 4/91 - 8/94 1986	/ Page Requested Action Del Del Del Del Del Del Del De	ivery Pick Up Re m Type = BOX From Date	To Date	Description EARNING RECORDS, EMF FACILITIES FILES AMNESTY FILES ADULT F	Departm BUSINESS BUSINESS ADULT ED
<< 1 2 3 Select Retrieve Retrieve Retrieve Retrieve	4 5 > >> Detail	Display Lon Barcode 000000139 000000155 000000607	g Description Excel Ex Customer Box # 00120 00242 00207	Port - All / Page Text Export - All Years In Box 4/91 - 8/94 1986 1998-89	/ Page Requested Action Del Del Dev Box Index A-F 6300 BUILDING CONSTRU CITIZENSHIP REPORTS	ivery Pick Up Re m Type = BOX From Date	To Date	Description EARNING RECORDS, EMF FACILITIES FILES AMNESTY FILES ADULT F	Departm BUSINESS BUSINESS ADULT ED



To request a non-indexed file out of this box, click the green plus sign 🛶

A window will open with an entry template, where you can enter the descriptive information for the file you are requesting.



Click Add when complete $\underline{\texttt{Add}~(\texttt{Ctrl+A})}$, followed by Close in the command bar.

Buildorder - G	Google Chrome	
🗋 rms.hcde	-texas.org/action.asp?Action=addnon2item&E=1710&pid=597432&ptype=21&pd	dept=779&
HARRIS CO Current Custom Request iter Item Type FILE	DEPARTMENT OF EDUCATION mer HARRIS COUNTY DEPT OF ED Current User JANE DOE Items Matched: (1) Items m(s) from thisBOX (000476496) Department REQUEST RECORDS MGMT - RECORDS MANAGEMENT	ms On Order: (0)
Close	Bar	
	Click View Order(s) within the command bar to proceed to the nex	t step.
Clear Input	Ad Bar	iew Order
<u> </u>	Here, you are able to review your order. If you want to add additional items to your order, return to the Search menu and make the appropriate selection.	
	When ready, click the Send Order button in the command ba	r.
HC	DE Search User Add Reports Help Log Out	
RRIS COUNTY DEPARTMEN Customer HARRIS COUI Imand Bar	NTY DEPT OF ED Current User JANE DOE	Items Matched
rder Remove All Ref	fresh	
Requests		
	Item Type = FII F	

	Item Type – FILE						
Edit	Remove	Action Barcode Parent Item Code Parent Reference	Customer File #	Index Item Id	Department	Comments	
Re FI	<u>emove</u> Add LE	000476496	JOHN DOE		RECORDS MGMT	Edit	



Click **Complete Send Order** to send your order through to Secure Storage Portal.

Current Customer HARRIS COUNTY DEPARTMENT OF EDUCAT	Search User	Add Reports Help Log Out
Complete Send Order Clear Comments		
Delivery options		
Customer Order Reference	court]
Select Delivery Priority	Retrieval & Delivery of Reco	ords 🔻
Charge to Department	RECORDS MGMT - RECO	RDS MANAGEMENT
Select Delivery Address	NORTH POST OAK	T
Address	6005 WESTVIEW]
Address]
City	HOUSTON]
State	ТХ]
Zip	77055]
Comments	please deliver to room 1013	

Your order has now been submitted to HCDE Records Management for processing. An order confirmation page will display your workorder number,

Current Customer HARRIS COUNTY Command Bar	OF EDUCATION TY DEPT OF ED Curr	Search User Add Reports Help Log Out ent User JANE DOE
Detail report in HTML Detail rep	port in PDF Text Exp	bort Excel Export
Work order summary		
Order for Customer: Harris County has been submitted under work ord	Dept of Ed and web use er # 1021538,	er: JANE DOE
	Order Date	11/19/2015 10:33:50 AM
	Your Ref	court
	<u>Deliver To</u>	6005 WESTVIEW HOUSTON, TX 77055
	Attention	JANE DOE
	Required By	11/20/2015 05:00:00 PM - STND
	Dept/Cost Center	RECORDS MGMT
	<u>Comments</u>	please deliver to room 1013
1		

6 Supply Orders

To order supplies, click	c on Search , and then Supplies .
Search User Add Quick Search/Request Advanced Search Item Supplies Pick Up	Reports Help Log Out
This screen will appear and p Simply indicate how many Sup	rompt you to make a Materials selection. materials you need and click on Add plies Request.
HARRIS COUNTY DEPARTMENT OF EDUCA Current Customer HARRIS COUNTY DEPT	Search User Add Reports Help Log Out TON DF ED Current User JANE DOE
Miscellaneous criteria	
Select Task	BAR - BARCODE LABELS 15 PER SHEET ▼
Select Department	RECORDS MGMT - RECORDS MANAGEMENT
Requested For	JANE DOE
Quantity	25
Comments	please deliver to Mary
Command Bar	
Add Miscellaneous Request View Order	

A summary of your request will appear below. Click **View Order(s)** to proceed to the next page.



		Search User Add Reports Help Log Out
HARRIS COUNTY D Current Customer HAR	RRIS COUNTY DEPT (OF ED Current User JANE DOE
 Miscellaneous criter 	ria	
	Select Task	BAR - BARCODE LABELS 15 PER SHEET
	Select Department	RECORDS MGMT - RECORDS MANAGEMENT
	Requested For	JANE DOE
	Quantity	25
	Comments	please deliver to Mary
Command Bar		
Add Miscellaneous Req	uest View Order	
Supply Request		
		Supply Request
Action	Service Code	Description Quantity Department Comments

Remove Supply Request BAR - BARCODE LABELS 15 PER SHEET 25.000 RECORDS MGMT please deliver to Mary



Follow the steps outlined previously for submitting an order from the View Order page.

7 Pick Up Orders

Command Bar-

Secure Storage Portal allows you to request a pickup of boxes or files with just a few simple steps.

First, choose Pick Up from the Search menu.



¥

Select Item Type

View Order

Quantity

BOX



Click View Order(s) in the Command Bar to proceed to the next step.

HARRIS COUN Current Customer O Pick up criteria	HERE COUNTY DEPT OF HARRIS COUNTY DEPT	Search Search OF ED Current User	User Add JANE DOE	Reports	Help Log Out
	Select Item Type Quantity	BOX 15	▼		
Command Bar Add Pickup Reque	st View Order				
Pick Up Items Action <u>Remove</u> Pick Up	Description Quantity BOX 15				

Here, you are able to review your order. If you want to add additional items to your order, return to the Search menu and make the appropriate selection.

When ready, click Send Order in the command bar.
HARRIS COUNTY DEPARTMENT OF EDUCATION Current Customer HARRIS COUNTY DEPT OF ED Current Customer HARRIS COUNTY DEPT OF ED Command Bar Send Order Remove All Refresh
Pick-up Requests
Pick Up Items
Action Description Quantity
Remove Pick Up BOX 15
Supply Request
Supply Request
Action Service Code Description Quantity Department Comments

On this final screen, complete the form by selecting when you want the pick up. You can use the comments section to enter any notes that might be

helpful for the Transportation Specialist, such as the size of the boxes, or where they are located.

Click Complete Send Order to ser	nd your order through the Secure Storage Portal.
HARRIS COUNTY DEPARTMENT OF EDUCA Current Customer HARRIS COUNTY DEPT Complete Send Order Clear Comments	Search User Add Reports Help Log Out OF ED Current User JANE DOE
- Delivery options	
Customer Order Reference	student files 2015
Select Delivery Priority	Pick up New Boxes
Charge to Department	RECORDS MGMT - RECORDS MANAGEMENT
Select Delivery Address	NORTH POST OAK
Address	6005 WESTVIEW
Address	
City	HOUSTON
State	TX
Zip	77055
Comments	room 123 across front office



8 Add Inventory - New Containers / Boxes

Add New Boxes

Secure Storage Portal gives you the ability to maintain an inventory of the items you send to HCDE Records Management for storage. With just a few quick steps, you will be on your way to ensuring that you have an accurate accounting of your storage inventory, making future retrievals and reporting that much easier.

To Add new boxes to your inventory using the Secure Storage Portal, begin by selecting **Item** from the **Add** menu.



Enter the pre-assigned HCDE barcode number that is affixed to your box, into the **Barcode Box #** field. Continue by entering the Descriptive Information applicable to your records.

HARRIS COUNTY DEPARTM	Search User	Add Reports Help	Log Out				
Current Customer HARRIS CO	JNTY DEPT OF ED Current User JANE	DOE				Items Matched: (0) Items (On Order: (1) (HCDI
Add new item(s)							
Item Type Depart	nent *Department Required	Requested For	-				
BOX V RECO	DS MGMT - RECORDS MANAGEMENT	JANE DOE					
Command Bar							
View Order							
r®							
Retain data entered on add							
Action Barcoc	Customer Box #	Years In Box	Box Index	From Date	To Date	Description	Expire Date
Add (Ctrl+A)							



Items Matched: (0) Items On Order: (2) (HCDE)

Add new	item(s)							
Item Type BOX	Department *Dep ▼ RECORDS MGM	artment Required T - RECORDS MANAGEMENT	Requested For JANE DOE					
- 😑 Command	l Bar							
View Order								
🗌 Retain data	entered on add							
Action	Barcode	Customer Box #	Years In Box	Box Index	From Date	To Date	Description	Expire Date
Add (Ctrl+A)								
Remove Edit	000513458	12	2012	A-C	2012	2015	STUDENT FILES	11/30/2020



Once you have entered all of your new boxes, click **View Order(s)** in the command bar to proceed to the next step.

A HC	DE Search Use	er Add Reports Help	Log Out				
HARRIS COUNTY DEPARTMENT Current Customer HARRIS COUNT Add new item(s)	OF EDUCATION IY DEPT OF ED Current User JAN	E DOE				Items Matched: (0) Items	; On Order: (2) (HCDE
Item Type Departmen BOX V RECORDS	t *Department Required MGMT - RECORDS MANAGEMEN	Requested For JANE DOE					
Command Bar							
r 🕘							
Retain data entered on add Action Barcode	Customer Box #	Years In Box	Box Index	From Date	To Date	Description	Expire Da
Add (Ctrl+A) Remove Edit 000513458	12	2012	A-C	2012	2015	STUDENT FILES	11/30/2020
	DE Search U:	ser Add Reports Help	Log Out				
Current Customer HARRIS COUN Command Bar Send Order Remove All Refr	Y DEPT OF ED Current User JA	NE DOE				Items Matched: (0)	Items On Order: (2)
Pick Up Items Action Description Qu <u>Remove</u> Pick Up BOX 15	antity						
Item Requests							
Edit Remove Action B	arcode Parent Item Code Par	ent Reference Custome	erBox#Yea	irs In Box	tem Type = BOX Box Index	From Date	To Date
Remove Add	0513458	12	2012	A-C	2012	2015	
							9



Your entry is now saved in the Secure Storage Portal. The confirmation page will provide you with your workorder number for reference.





Search User Add Reports Help Log Out

HARRIS COUNTY DEPARTMENT OF EDUCATION Current Customer HARRIS COUNTY DEPT OF ED Current User JANE DOE

Detail report in HTML Detail report in PDF Text Export Excel Export

🕒 Work order summary

Order for Customer: Harris County Dept of Ed and web user: JANE DOE has been submitted under work order # 1021590,

Order Date	11/20/2015 09:31:07 AM
Your Ref	STUDENT CUMS 2015
Deliver To	6005 WESTVIEW HOUSTON, TX 77055
Attention	JANE DOE
Required By	11/20/2015 09:31:07 AM - NEW
Dept/Cost Center	RECORDS MGMT
Comments	PLEASE PICK UP NEW BOXES IN ROOM 103

Click on the **Detail Report in PDF** to view the details of what you have entered.

oustomeri								
Priority: NE	W Due	Date: 11/20/2015	09:31					
Requested	by: JANE DOE							
Barcode	Customer Box #	Years In Box	Box Index	Department	Service Description	Requested For	Parent Item Code	Parent Box #
Barcode 000513457	Customer Box #	Years In Box 2012	Box Index A-C	Department RECORDS MGMT	Service Description Miscellaneous	Requested For JANE DOE	Parent Item Code	Parent Box #

At this point you can print a detailed copy of your order confirmation for your records if you wish to do so.



9 Edit Containers

In order to Edit data for a particular item (box/container) you can simply pull up the item in the Search Order screen and then click the **Edit** item on the left for the item that you wish to make data changes.

	dd Reports Help Lo	g Out				
HARRIS COUNTY DEPARTMENT OF EDUCATION Current Customer HARRIS COUNTY DEPT OF ED Current User JANE DOE					Items Matched: (1) Items ()n Order: (0) (HCDE
📔 Quick Search Criteria						
Item Type Department BOX	Order By Barcode	Requested For JANE DOE	Page Size 5			
Search Fields (FILE)						
Barcode Parent Item Code Parent Reference Customer File 000476496	# Index Item Id					
Command Bar						
Clear Input Search New Search Import from file Clear Results	Select All View Order					
Results						
Display Long Description Excel Export - All / Page Text Export - All / P	age Requested Action 🖲	Delivery OPick Up ORemo	ove			
		It	em Type = BOX			
Edit Select Detail Barcode Customer Box #	Years In Box	Box Index	From Date	To Date	Description	Departn
Edit Retrieve 🕂 📄 🌉 🔌 000476496	11/13-5/14	COH 0023			INVOICE BACK UP	RECORDS MG

You are then able to edit any of the data directly in the reference fields to the right of the container or file that you have selected. After you have made your changes, click the **Save** item and click on the **Update Successful** in the center of the page to save the changes that you have made.

	CH	ICD	E	Search User Add	Reports Help Log Out					
HARR Current Cu	stomer HA	RRIS COUNTY DE	EPT OF ED Cu	ırrent User JANE DOE				Items	Matched: (1) Items On Ord	ler: (0) (HCDE)
Quick S	Search Crite	ria								
Item Type BOX	۲	Department			Order By ▼ Barcode ▼	Requested For Pa JANE DOE 5	ge Size			
Search	Fields (FILE	.)								
Barcode 000476496	Pa	rent Item Code	Parent Refere	ence Customer File #	Index Item Id					
- Comma	nd Bar									
Clear Input	Search	New Search	Import from	file Clear Results Sele	ct All View Order					
Results										
Display	y Long Desc	ription Excel Ex	port - All / Pag	e Text Export - All / Page	Requested Action 🖲 Delive	ry 🔍 Pick Up 🔍 Remove				
						Iten	n Type = BOX			
Edit	Select	Detail	Barcode	Customer Box #	Years In Box	Box Index	From Date	To Date	Description	De
Save Cancel		🔶 📄 🚔 🔊	000476496		11/13-5/14	COH 0023			INVOICE BACK UP	RECORDS
1	VATRIAVA									

10 Log Out

To Log Out of the Secure Storage Portal website, simply click on Log Out.



