INFORMATION AND RECORDS MANAGEMENT SOLUTIONS

SECURE STORAGE PORTAL

USER GUIDE
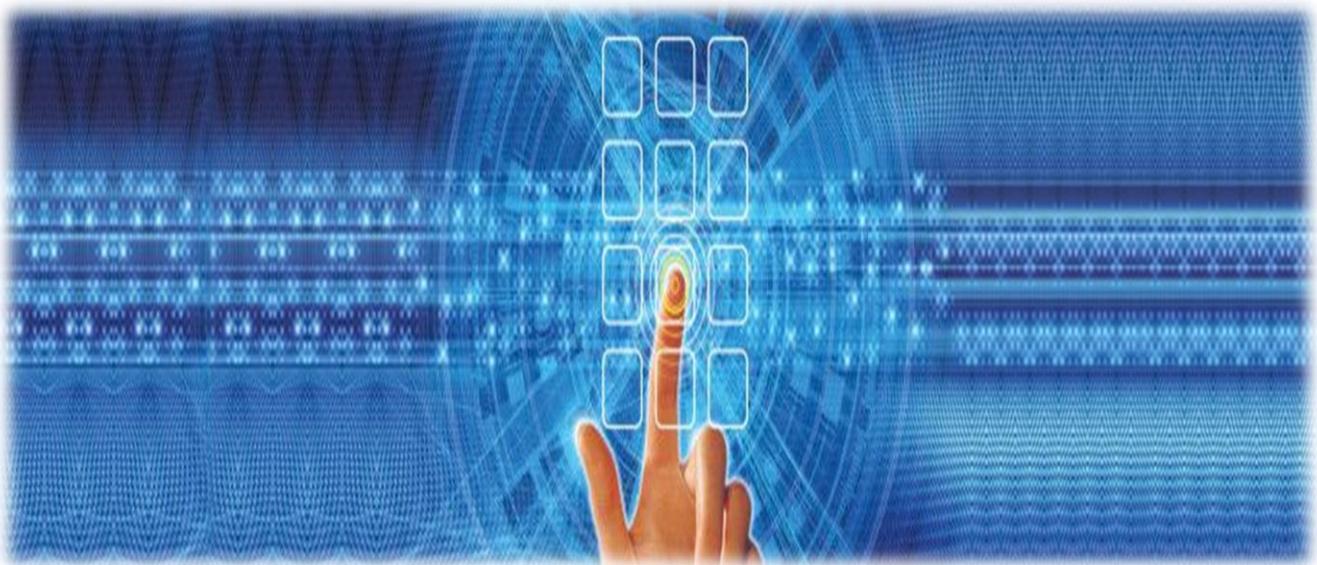
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1 Introduction

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 individually-designed 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

HCDE
HARRIS COUNTY DEPARTMENT OF EDUCATION

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

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.

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

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

Your search results will display in the Results section.

![HCDE - HARRIS COUNTY DEPARTMENT OF EDUCATION]

Search | User | Add | Reports | Help | Log Out

Current Customer HARRIS COUNTY DEPT OF ED Current User JANE DOE

Items Matched: (1) Items On Order: (0) (HCDE)

Quick Search Criteria

Item Type	Department	Order By	Requested For	Page Size
BOX ▼	RECORDS MGMT - RECORDS MANAGEMENT ▼	Barcode ▼	JANE DOE	20

Search Fields (BOX)

Barcode	Customer Box #	Years In Box	Box Index	From Date	To Date	Description	Expire Date 1
000476496							

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 / Page* Requested Action ⦿ Delivery ◯ Pick Up ◯ Remove

Item Type = BOX

Select	Detail	Barcode	Customer Box #	Years In Box	Box Index	From Date	To Date	Description	Department
☐ Retrieve	➕ 🖼️🔍	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.

![HCDE - HARRIS COUNTY DEPARTMENT OF EDUCATION]

Search | User | Add | Reports | Help | Log Out

Current Customer HARRIS COUNTY DEPT OF ED Current User JANE DOE

Items Matched: (1) Items On Order: (1) (HCDE)

Quick Search Criteria

Item Type	Department	Order By	Requested For	Page Size
BOX ▼	RECORDS MGMT - RECORDS MANAGEMENT ▼	Barcode ▼	JANE DOE	20

Search Fields (BOX)

Barcode	Customer Box #	Years In Box	Box Index	From Date	To Date	Description	Expire Date 1
000476496							

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 / Page* Requested Action ⦿ Delivery ◯ Pick Up ◯ Remove

Item Type = BOX

Select	Detail	Barcode	Customer Box #	Years In Box	Box Index	From Date	To Date	Description	Department
Pending Send Order for JANE DOE	➕ 🖼️🔍	000476496		11/13-5/14	COH 0023			INVOICE BACK UP	RECORDS MGMT

Click **View Order(s)** within the command bar to proceed to the next step.

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.

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

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

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Search   User   Add   Reports   Help   Log Out

Current Customer HARRIS COUNTY DEPT 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.

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Search   User   Add   Reports   Help   Log Out

Current Customer HARRIS COUNTY DEPT OF ED   Current User JANE DOE

Command Bar

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 # 1021370,

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
Comments	Please deliver to room 1073

4 View Item History Report

➡️ *Click on the **Search** menu and choose **Quick Search/Request.***

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 🔍 con to view the Item History Report.

Results

☐ Display Long Description   Excel Export - All / Page   Text Export - All / Page   Requested Action ⦿ Delivery ◯ Pick Up ◯ Remove

Item Type = BOX

Select	Detail	Barcode	Customer Box #	Years In Box	Box Index	From Date	To Date	Description
☐ Retrieve	➕ 🖼️🔍	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.

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Item History Report (000001568)

Work Order	Action	Date	Requested For	Requested By	Comments
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.
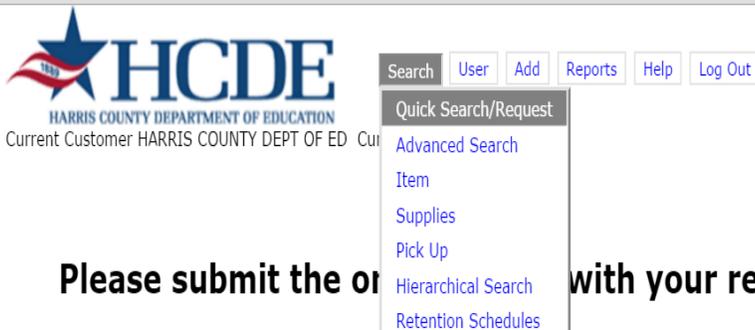
Use the data field boxes to input your search criteria, that is, HCDE Barcode #, HCDE File #, Alternate, and so on.

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.**

Your search results will display in the Results section.

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 Add (Ctrl+A) , followed by **Close** in the command bar.

Click **View Order(s)** within the command bar to proceed to the next step.

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.

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

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

6 Supply Orders

To order supplies, click on **Search**, and then **Supplies**.

This screen will appear and prompt you to make a **Materials** *selection.*
Simply indicate how many materials you need and click on **Add Supplies Request.**

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

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

7 Pick Up Orders

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.

➡️ Next, enter the type, and quantity of items you have ready to be sent to HCDE Records Management, and click **Add Pick Up Request.**

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

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.

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 send your order through the Secure Storage Portal.
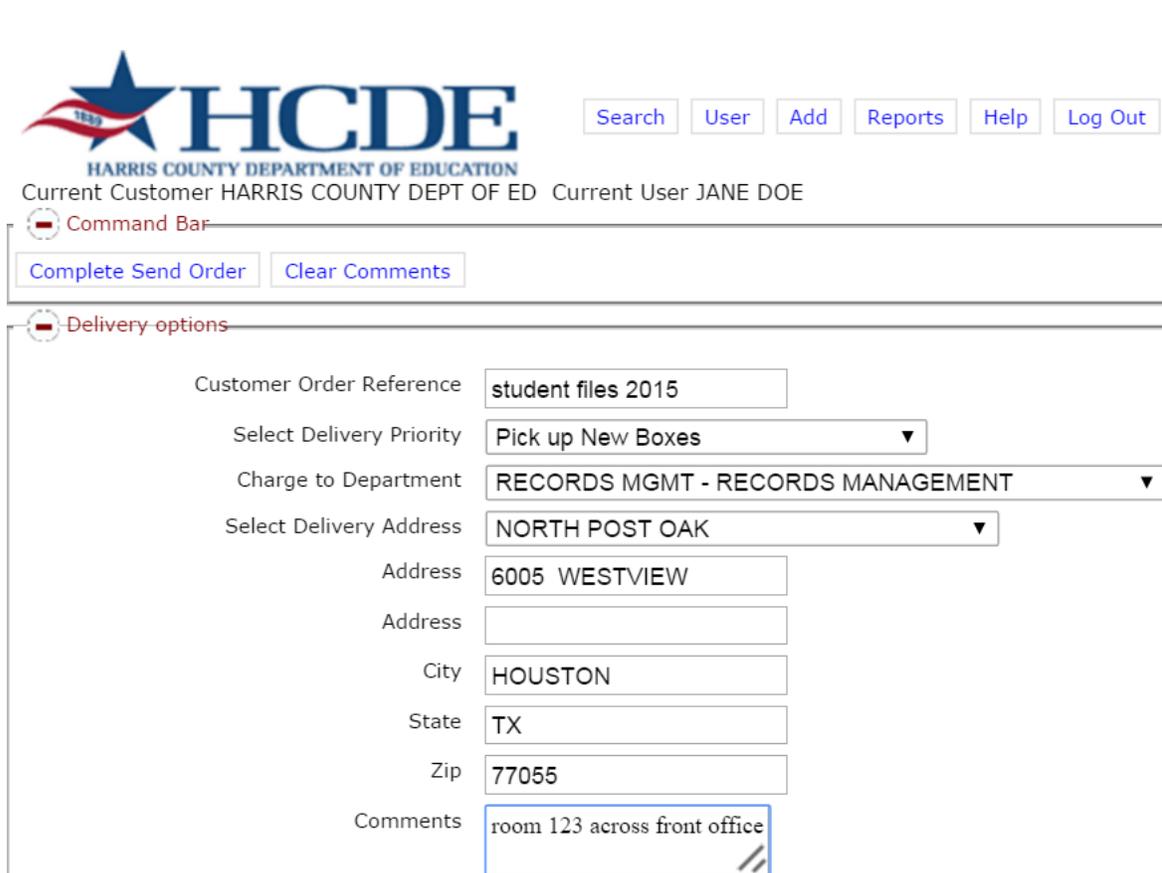
8 Add Inventory - New Containers / Boxes

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.
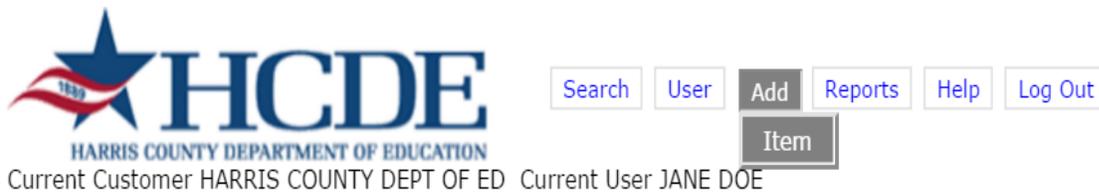

Current Customer HARRIS COUNTY DEPT OF ED   Current User JANE DOE

➡ 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.

Current Customer HARRIS COUNTY DEPT OF ED   Current User JANE DOE

Items Matched: (0) Items On Order: (1) (HCD

Add new item(s)

Item Type	Department *Department Required	Requested For
BOX ▼	RECORDS MGMT - RECORDS MANAGEMENT ▼	JANE DOE

Command 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)								

Search User Add Reports Help Log Out

Current Customer HARRIS COUNTY DEPT OF ED Current User JANE DOE

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

Add new item(s)

Item Type: BOX
Department *Department Required: RECORDS MGMT - RECORDS MANAGEMENT
Requested For: JANE DOE

Command 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.

Once you have confirmed that the entries you have made are exactly as you wish them to appear in the Secure Storage Portal database, click the **Send Order** button in the command bar.

Command Bar
Send Order Remove All Refresh

Pick-up Requests

Pick Up Items

Action	Description	Quantity
Remove Pick Up	BOX	15

Item Requests

						Item Type = BOX				
Edit	Remove	Action	Barcode	Parent Item Code	Parent Reference	Customer Box #	Years In Box	Box Index	From Date	To Date
Remove		Add BOX	000513458			12	2012	A-C	2012	2015

Complete the final page by making the appropriate selections from the drop down menus.

Please note, the delivery priority when entering new data is PICK UP NEW BOXES.

To send your entry through to the Secure Storage Portal database, click the **Complete Send Order** button in the command bar

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Search User Add Reports Help Log Out

Current Customer HARRIS COUNTY DEPT OF ED Current User JANE DOE

Command Bar

| Complete Send Order | Clear Comments |

Delivery options

Customer Order Reference	STUDENT CUMS 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	PLEASE PICK UP NEW BOXES IN ROOM 103

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

Information where @ it belongs... your Fingertips!

Current Customer HARRIS COUNTY DEPT OF ED **Current User** JANE DOE

Search | User | Add | Reports | Help | Log Out

Command Bar

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.

Line Report for Work Order #1021590

Customer Reference: STUDENT CUMS 2015

Priority: NEW   **Due Date: 11/20/2015 09:31**

Requested by: JANE DOE

WO Description: PLEASE PICK UP NEW BOXES IN ROOM 103

Barcode	Customer Box #	Years In Box	Box Index	Department	Service Description	Requested For	Parent Item Code	Parent Box #
000513457	12	2012	A-C	RECORDS MGMT	Miscellaneous	JANE DOE		
					Line Comments: Unassigned storage item has been added to inventory			

*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.

➡️ 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.

10 Log Out

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