FileBRIDGE®

Access FileBRIDGE Instructions for University of Pittsburgh Users

June 2017

University of Pittsburgh Records Management

University of Pittsburgh
ULS University Library System
RESOURCES | TECHNOLOGY | EXPERTISE

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I. Introduction

The following instructions were created by the university records manager and are intended for University of Pittsburgh users of FileBRIDGE, Access's online records management and service platform. FileBRIDGE can be used for generating account inventories, box retrieval and returns, supply orders, and new box submission. Destruction requests cannot be requested through FileBRIDGE.

FileBRIDGE is not replacing the University's service request forms, it is simply a second method for servicing your department's records. All procedures already in place remain the same for orders submitted via FileBRIDGE: someone must be present to sign for deliveries and pickups; service windows remain 24-48 hours, per our normal Access operating procedures; only authorized users can log in and request service, etc…

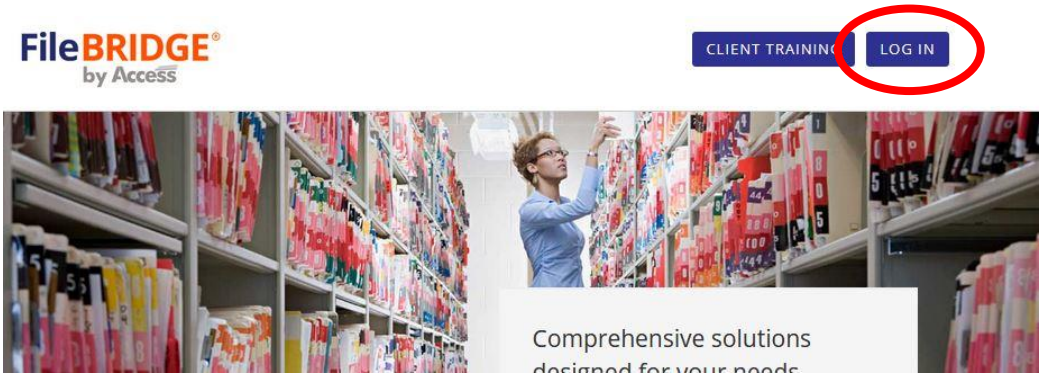
Please be aware that unless you remove a user's access when they leave your office, they may still have access to your records. The university records management program cannot monitor all employee turnover within University departments.

Should you have questions concerning FileBRIDGE, or access for your department, please contact the University Records Management Program at recordsmanagement@pitt.edu.

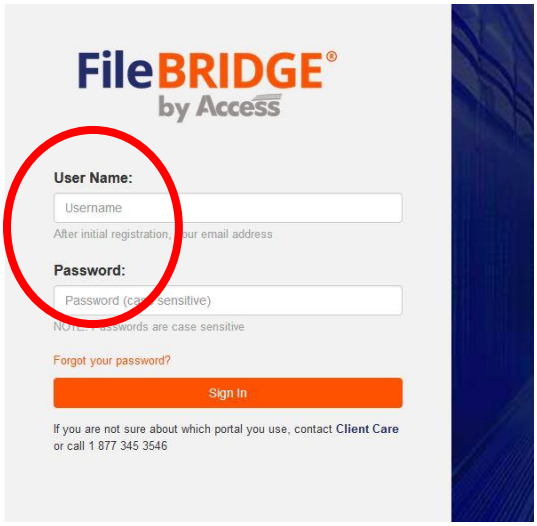
II. Getting Started

A. Log in

Navigate to www.filebrigde.com. In the upper right hand corner of the screen, select *LOG IN.*

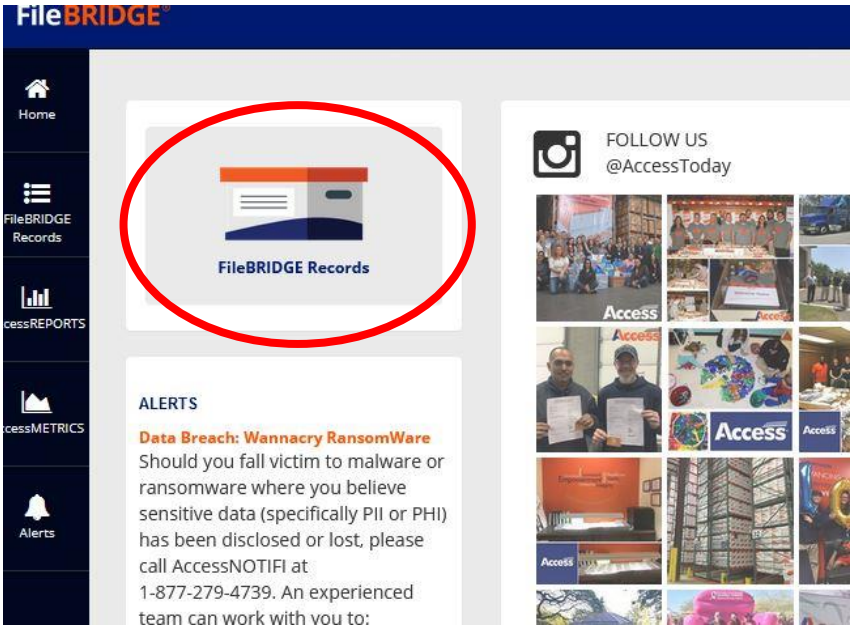


Input your user name and password as prompted and select *Sign In*. The first time you log in you will be given a temporary password, which you can subsequently reset to a password of your choice.



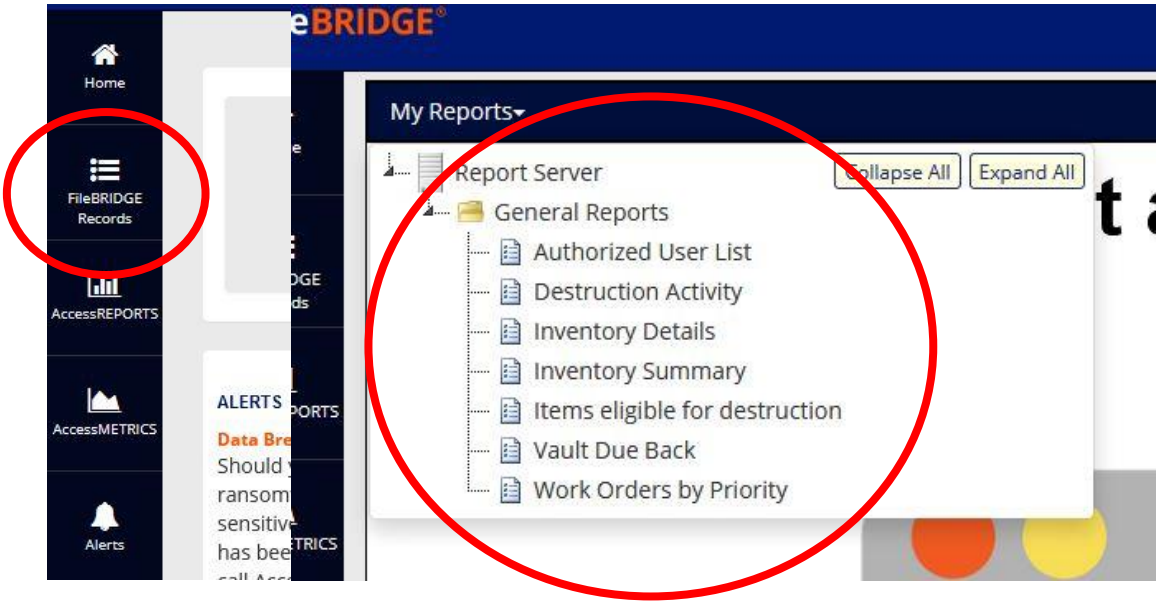
B. Access Portal

You will be brought to the FileBRIDGE portal, where you'll see functional selections on the left, as well as Access social media, announcements and alerts. Access service requests can be found by selecting *FileBRIDGE Records*.

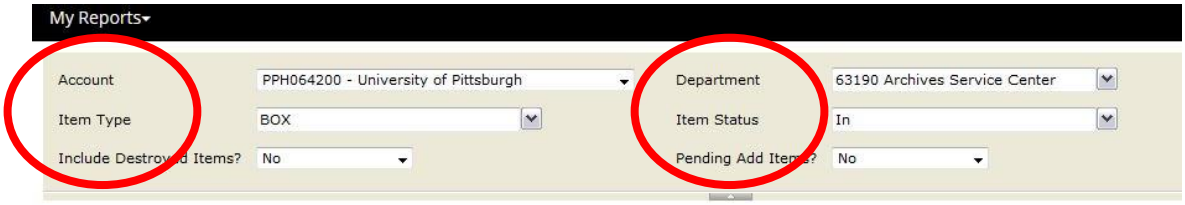


C. Access Reports

Select *Access Reports* from the FileBRIDGE Portal to generate reports for your department's account based on certain parameters such as *Inventory Details*, *FileBRIDGE Authorized Users*, or *Items Eligible for Destruction*.



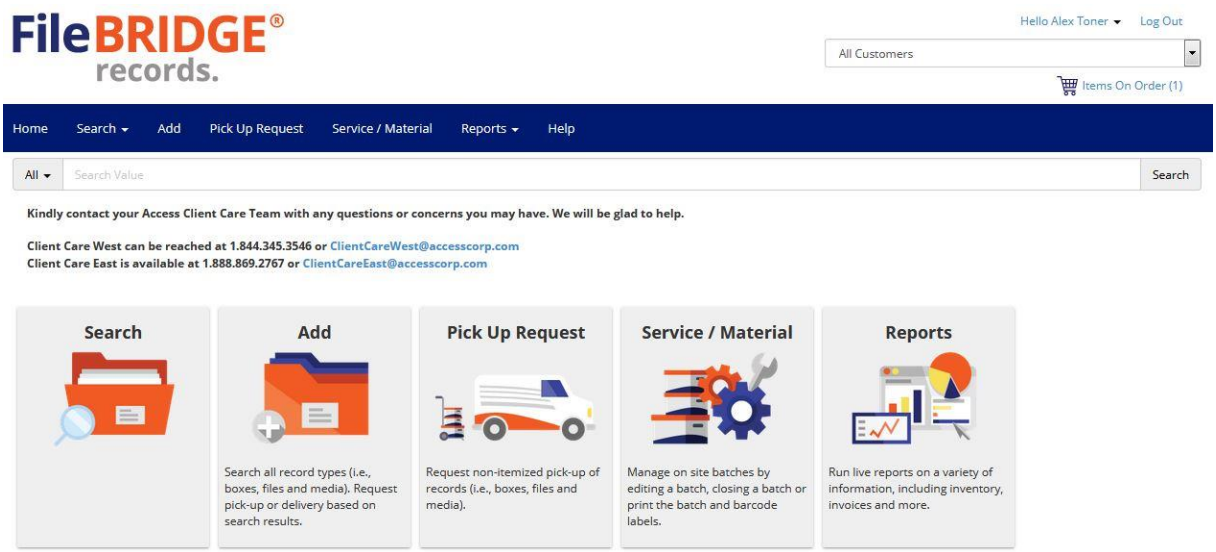
For example, select *Item Detail* to generate an inventory report. Select *Account, Item Type*, *Department*, and the other fields based on your search parameters and click *View Report*.



Select *Next Page* to move through your inventory, or the *Export Drop Down Menu* to generate an inventory in certain file format.

III. Using FileBRIDGE Records

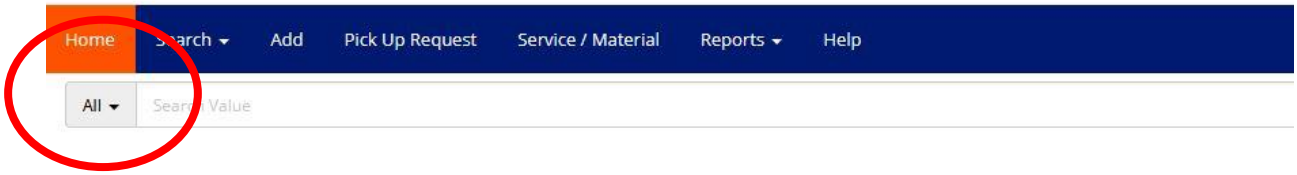
On the FileBRIDGE Records dashboard you'll find service requests you can use to search and run your department's inventory (in addition to the above), retrieve records from storage, add records to storage, request a pickup, and order supplies.



All services should be similar to current Access service requests and have the same requirements and procedures.

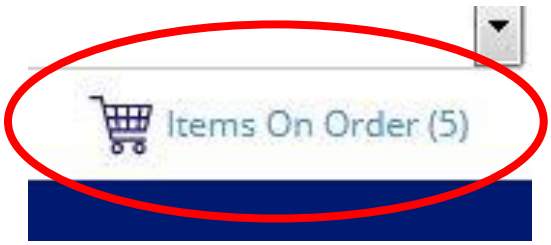
A. Search Value

Use the *Search Bar* to search a barcode number, or any other piece of inventory information (*To Date*, *Description*, etc…) for a particular item type your department has in storage. When *ALL* is selected, your search will run against your entire inventory

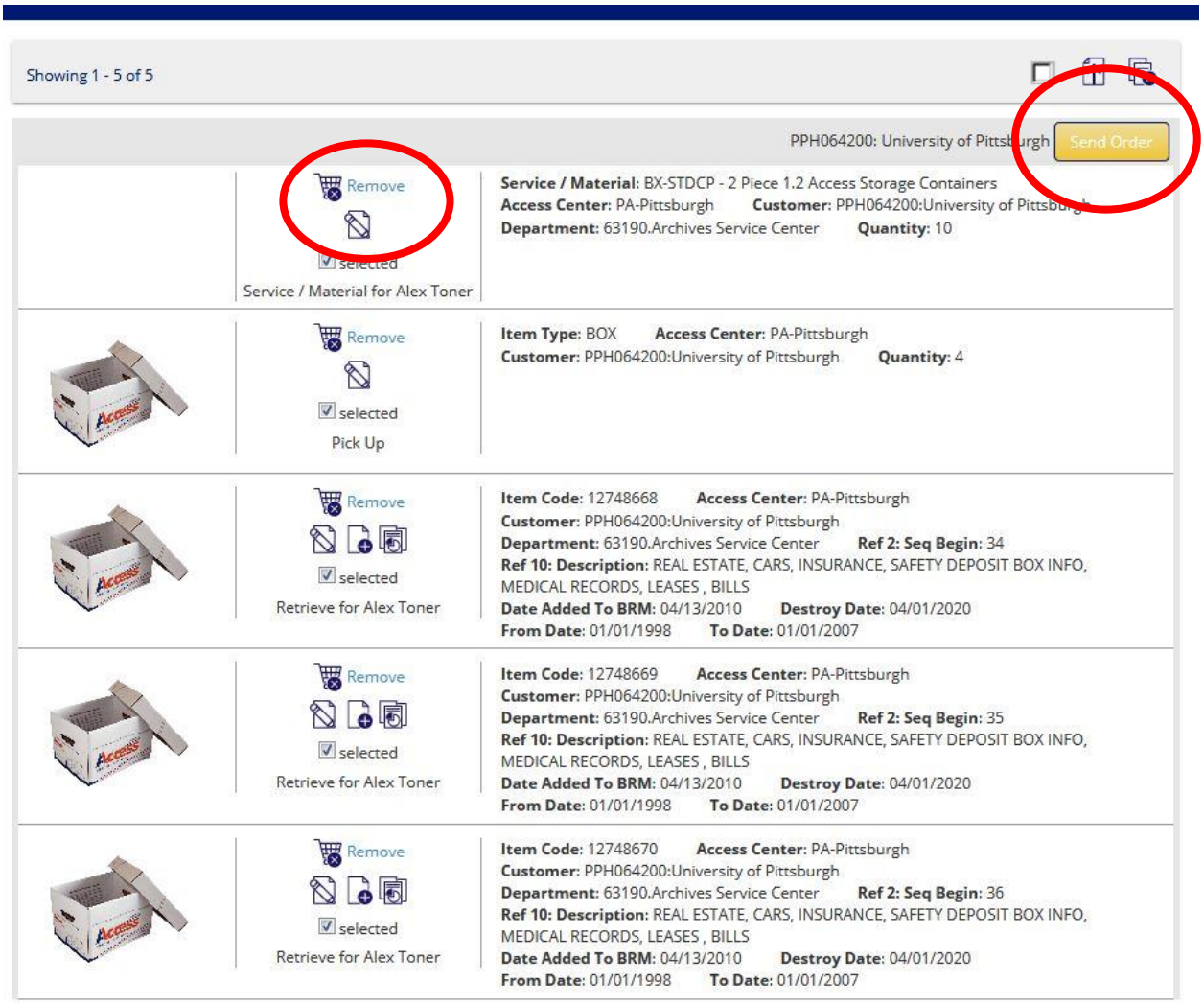


B. Items On Order

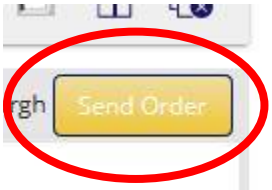
The selections you make for the following service requests will be save in your *Items On Order*, found in the upper right hand corner of all screens. You can make multiples service requests, such as retrieving a box and ordering supplies, prior to sending the order (similar to online shopping).



Upon clicking *Items On Order*, you'll see your order listed. Use this screen to *Send Order*, or *Remove Items* you selected.

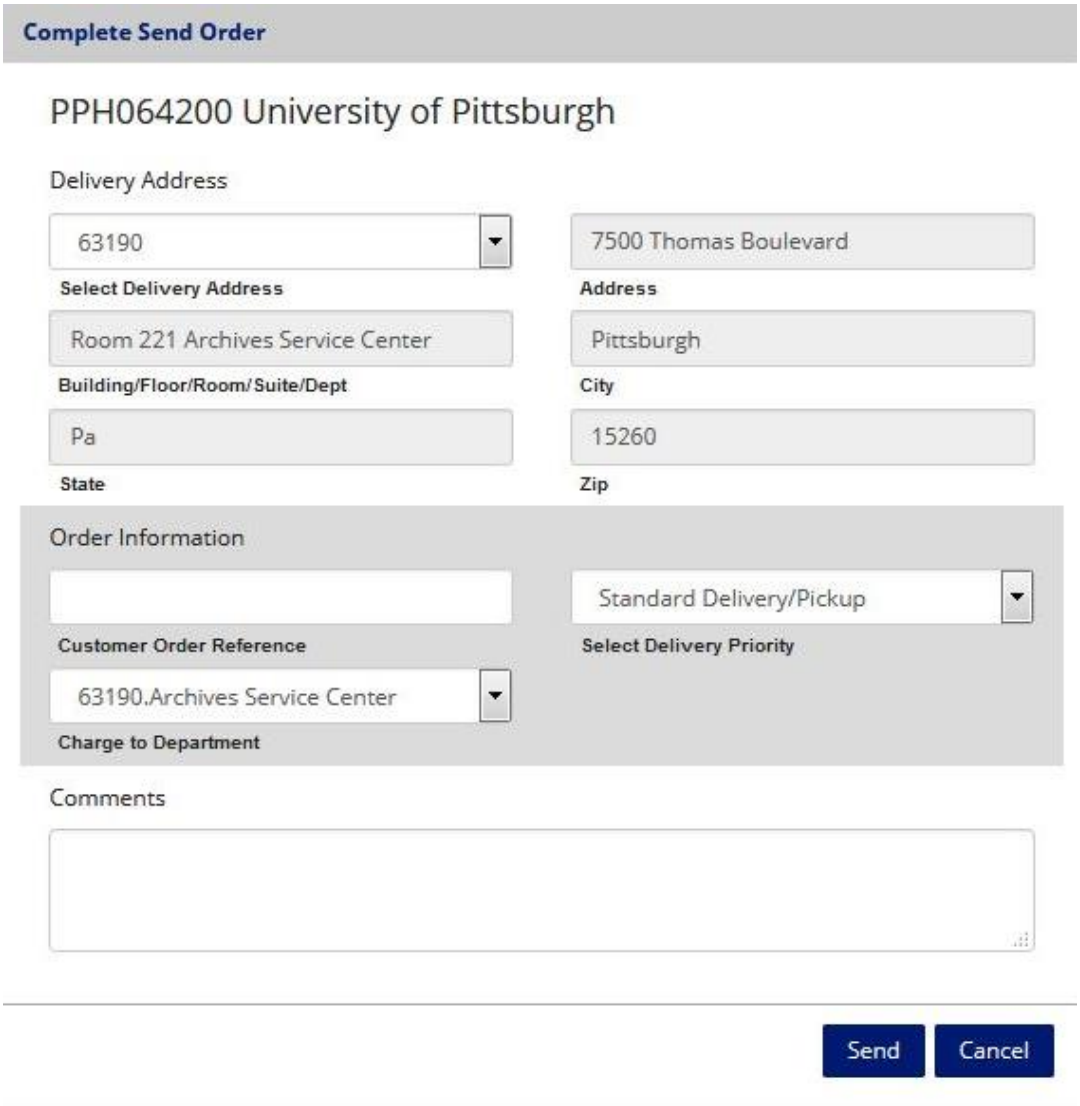


You can select *Send Order* to complete your request, or continue to service your account (order will remain in *Items On Order*).



C. Send Order

Select your account's delivery address, which will auto populate your account's address on file. Please contact the university records manager if this address is incorrect.



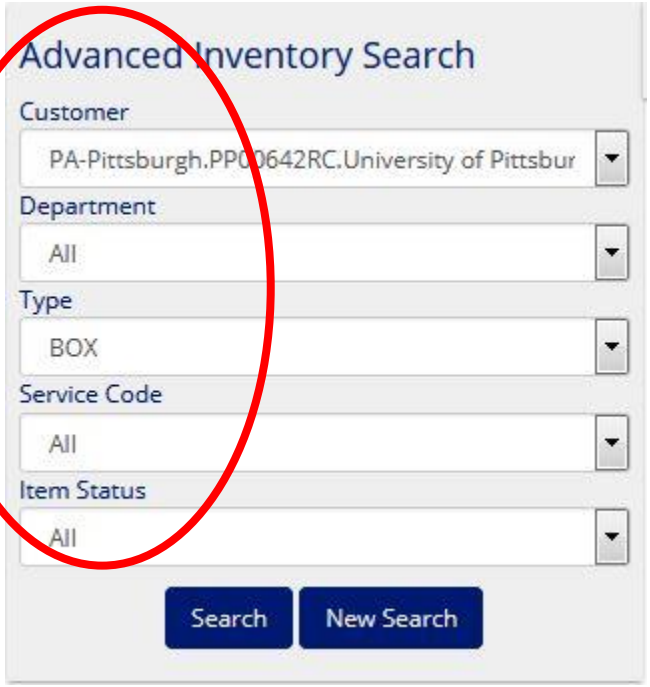
Normal service will use *Standard Delivery/Pickup*. *Same Business Day Service* is available for Rush Delivery, to be used only in extraordinary circumstances. Should you need emergency service, please call 412-321-0600. Use the *Comments* field to enter instructions to Access operations and drivers.

Click *Send*. Your order will be submitted and you will receive a confirmation email and order reference number.

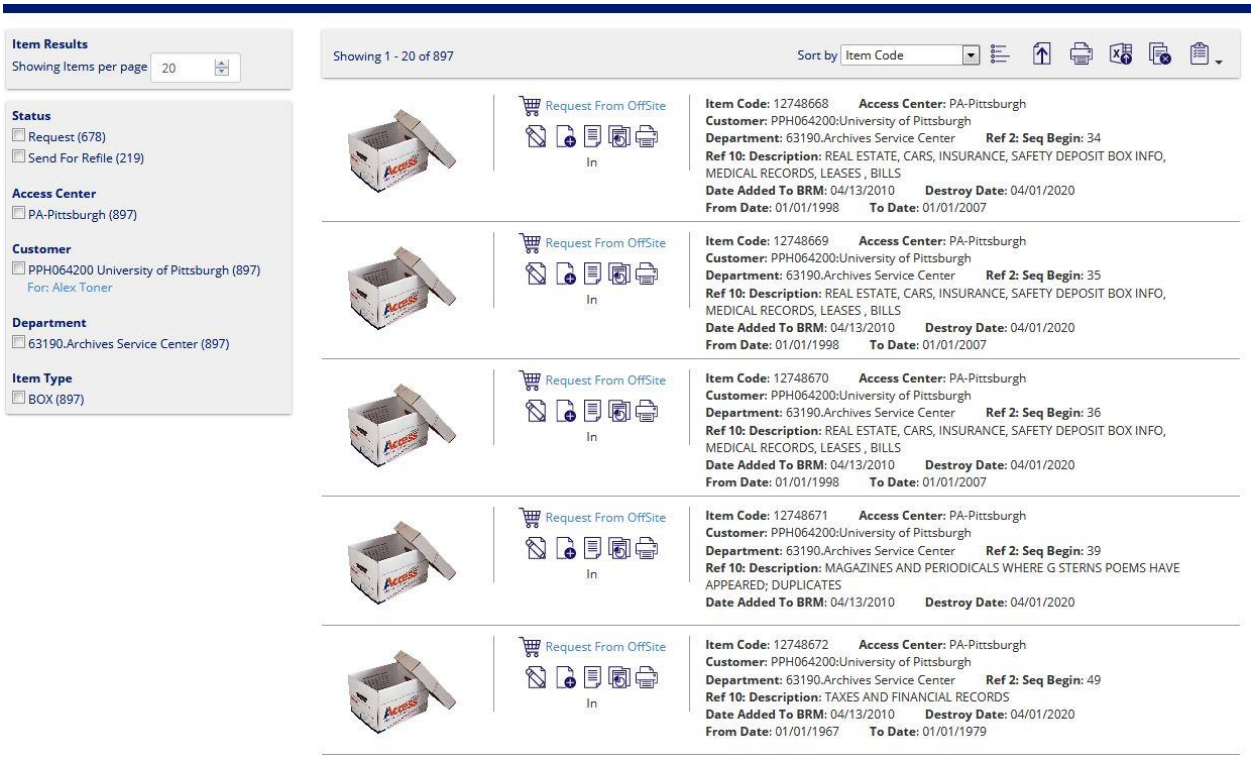
D. SEARCH (Box Retrieval Request)

Use the *Search* function to search for boxes and request retrieval, as well as to generate an inventory of your department's holdings.

Use the *Advanced Inventory Search* fields on the left side of the screen to search your department's holdings by *Type* (box, file, tape) and *Item Status* (in storage, out of storage, permanently removed, destroyed).

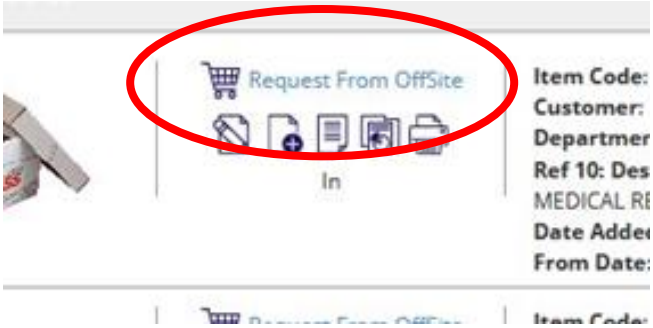


To generate a total inventory, select your *Department*, *Type*, and *Item Status* as ALL, and select *Search*. You will see results displaying your departments holdings by item.

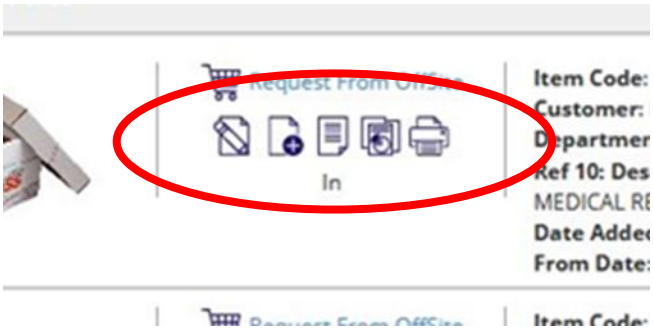


Once the search has generated results, select *Excel Exports* in the upper right corner to generate an excel inventory report of your department's holdings.

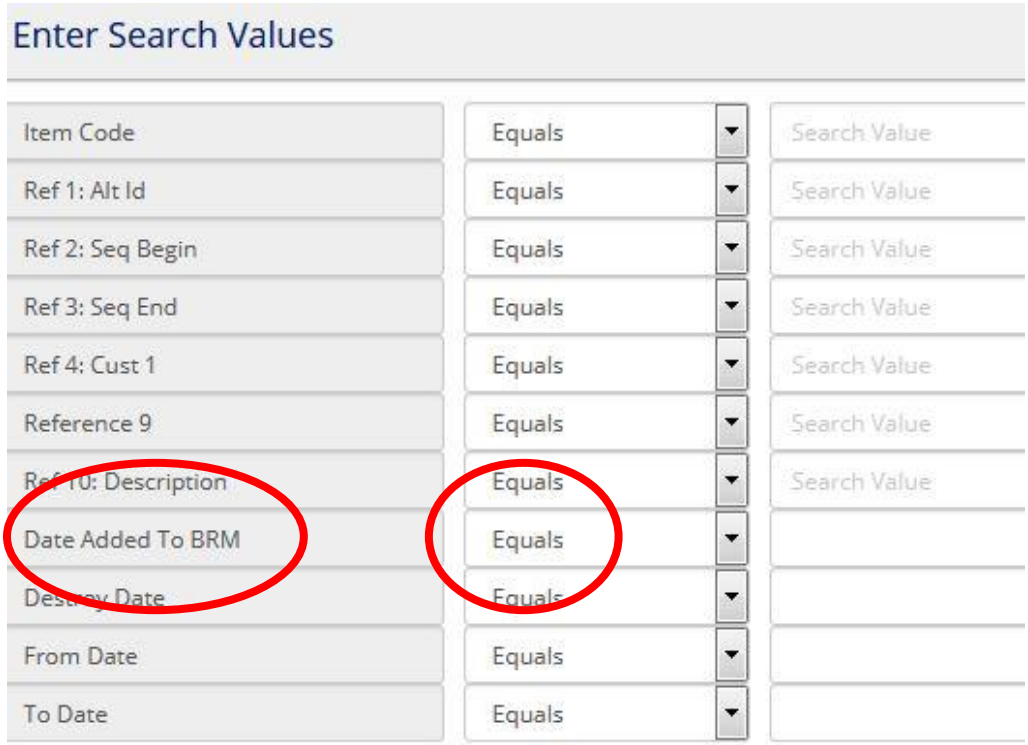
Use the *Request From Off Site* selection to request a particular item from storage. Your item will be placed in *Items On Order*.



You may also use search results features to *Edit Item*, *Add Item to Parent* (adding a file folder to a box), *Request Non-indexed Contents* (giving Access permission to open and retrieve a file folder in the box); *Item History Report* (history of service and requests); and to *Print Item Detail*.



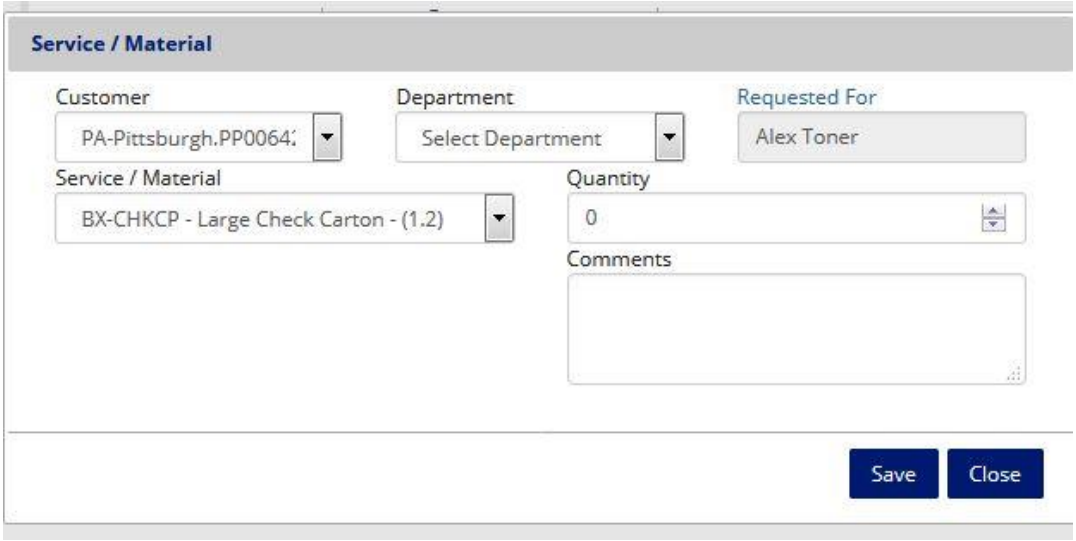
To set parameters for your search, like searching boxes by *Date Added to BRM* (Access), *Destroy Date*, or *Description*, use the Search Value fields. Use the field delineators to set parameters such as *equals*, *greater than or equals*, *less than or equals*, *is blank*, or *between*.



See Section III, items B and C, Items On Order and Send Order, for instructions on finalizing and sending your order.

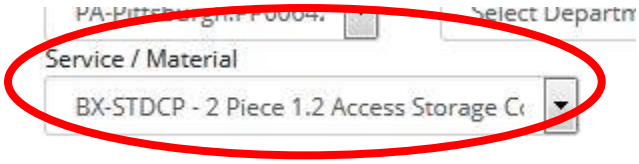
E. Service/Material (Supply Order Form)

Select *Service/Material* to order supplies like boxes and labels. A prompt box will appear, through which you will make your selections.



Under the *Customer* field select PPH064200 UNIVERSITY OF PITTSBURGH, and your department for the *Department* field. You should only have access to the department(s) you are authorized to use. Should you have access to other departments, please contact the university records manager. The *Requested For* field should populate your name, based on your login.

Use the *Service/Material* field to select standard "2 Piece 1.2 Access Storage Containers", "Container Barcode Labels", or other supplies you may require. Use the *Quantity* field to mark the amount of your supply selection that you need.



Use the *Comments* field to communicate instructions to Access operations, such as "Enter building and take elevator to sixth floor, turn right and ring doorbell" or "Please deliver supplies to our office located at 4000 Forbes Avenue, Suite 123, which is different than our address on file."

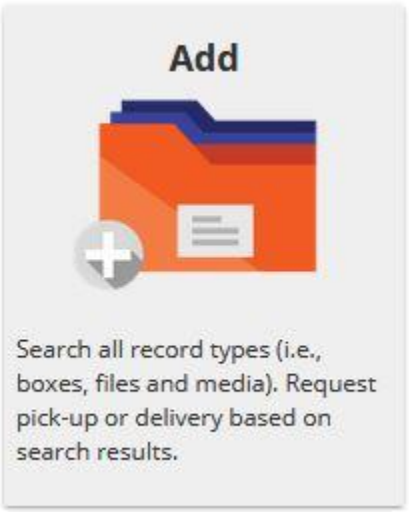
When you've completed your selection hit *Save*. Your order will be saved and the prompt box will be reset. Continue to order supplies if necessary, otherwise hit close.

See Section III, items B and C, Items On Order and Send Order, for instructions on finalizing and sending your order.

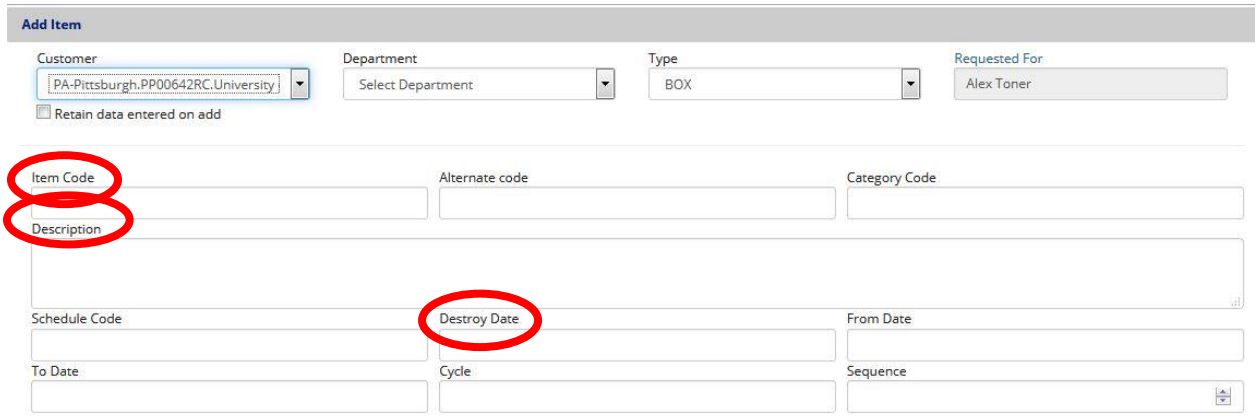
F. ADD (New Boxes Submission)

Select *ADD* and you will be presented with a prompt box in which you will enter inventory

information for a single new box or file to be submitted to storage. Be sure your customer, department, and type (box, file, tape) are correct.

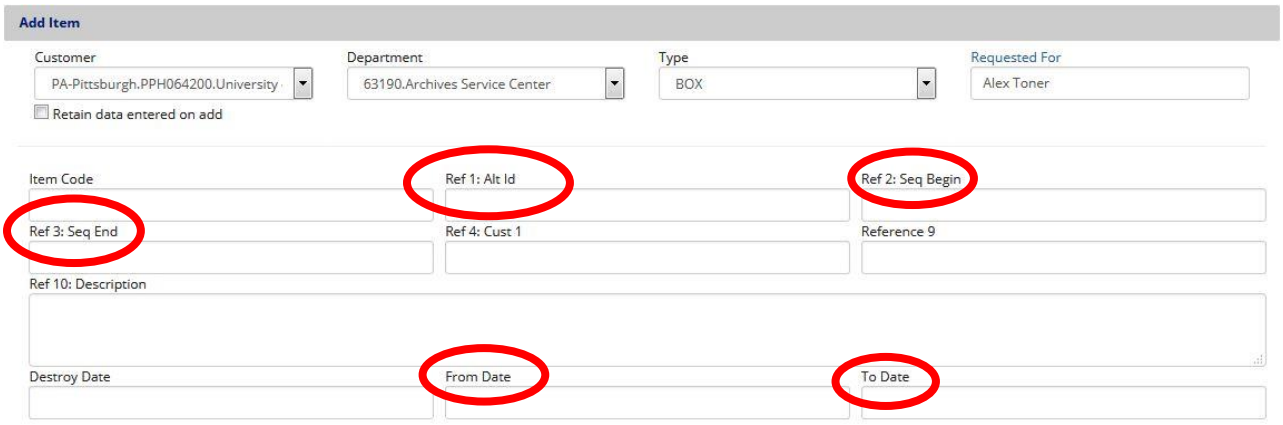


There are three mandatory fields you are required to complete for each item: *Item code* (barcode number), *Destroy Date*, and *Description*.



Keep in mind the following field:
Item Code: Barcode number on the item you are submitting, i.e. PAPT00146365.
Destroy Date: Mandatory destruction review date based on a combination of University of Pittsburgh retention guidelines, departmental retention guidelines, and/or grant or funding agency record retention requirements. Please see the university records management website for more resources, or contact the university records manager. Maximum 15-year review period.
Description: Succinct description of box or file contents, used by your department to review and retrieve records, and by university records management to assess records being assigned for destruction. Avoid generalizations such as “student records”, “office files”, or “financial documents”.

Use additional fields like *To Date* and *From Date* to input record dates, and *Seq Begin* and *Seq End* to add alpha (A-D; E-H) or numeric (001-012) metadata. *Alternative Code* is used to search non-Access barcodes affiliated with your boxes, for instance if they were transferred from Iron Mountain or another facility.

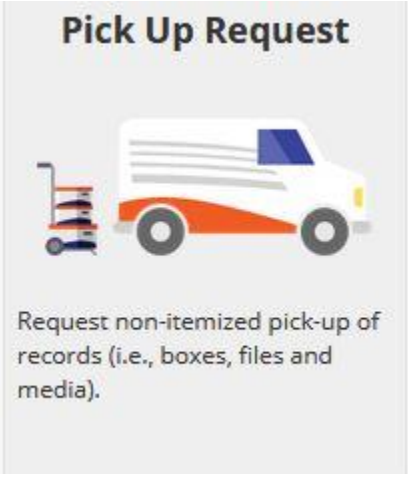


Select *Save* and your information for that item will be added to your *Items on Order*. Continue to add new items for submission, or navigate to *Items on Order* to send your order.

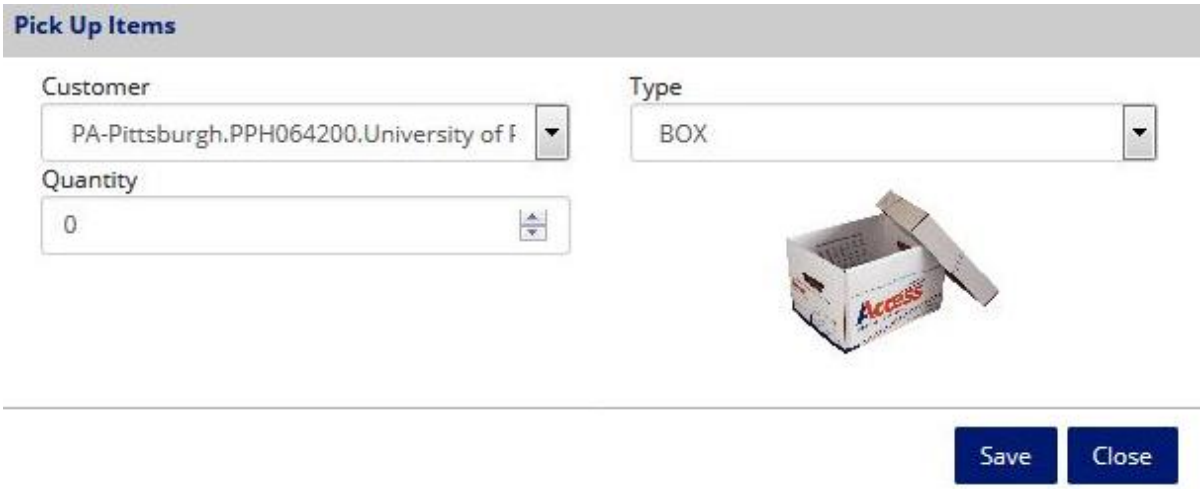
See Section III, items B and C, Items On Order and Send Order, for instructions on finalizing and sending your order.

G. PICK UP REQUEST (Box Return)

Use the *Pick Up* request function to return barcoded boxes to storage.



Once selected, you'll be prompted for your *Customer ID*, *Type* (box, tape, file), and *Quantity*. Selecting save will add your request to *Items On Order*, and reset the prompt. Proceed to *Items On Order* to submit your request.



See Section III, items B and C, Items On Order and Send Order, for instructions on finalizing and sending your order.

IV. FAQs

Is FileBRIDGE replacing the PDF forms found on the university records management website?
No. FileBRIDGE is a second method for requesting service for your account. University policy requires that all procedures used in utilizing your Access account via the paper forms still apply to service request submitted through FileBRIDGE.

Can FileBRIDGE be used for destruction service requests?
No. Users requiring destruction services should use the destruction order form on the university records management website.

Should I be able to access departments that aren't my own?
No! Please be honest and immediately report if you have access to a department not your own. Contact University Records Management.

Can I apply permanent retention dates to my record submissions?
Destruction/review dates are required to be no longer than 15-year retention periods, meaning these records will come up for review in 15 years. This allows for proper management and oversight of all university records in storage.

Is there required inventory information for new records being submitted to storage?
Yes. New box submissions must have a valid barcode, destruction/review date, and description or they will not be accepted for storage.

Can I request a different delivery address than my primary one?
Yes. Verify your account address is accurate. If inaccurate, contact the university records

manager. If requesting one-time service to a location other than your primary location, use the comments box to provide address and delivery instructions.

Can I request rush deliveries through FileBRIDGE?
Yes. Select *Standard Delivery* as your normal delivery option. Same day service is available for rush delivery using *Same Day Service*, to be used only in extraordinary circumstances. Should you need emergency service, please call 412-321-0600.

Can I request file level, vault, or environmental storage bar code labels using FileBRIDGE?
Yes. When ordering barcode labels, use the comments section to distinguish between box or file level, as well as environmental control.

Is it possible to schedule a service date in advance through FileBRIDGE?
No. Users *cannot* schedule a service date in advance via FileBRIDGE. This must be done via email or over the phone with Access client care.

Can I make specific requests for driver pick-ups?
Yes. Use the *Comments* field on all service prompts to input specific instructions for drivers, i.e "Ask for Mary" or "Use the rear loading dock and ring the doorbell upon arrival."