



Access FileBRIDGE Instructions for University of Pittsburgh Users

June 2017

University of Pittsburgh Records Management



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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...

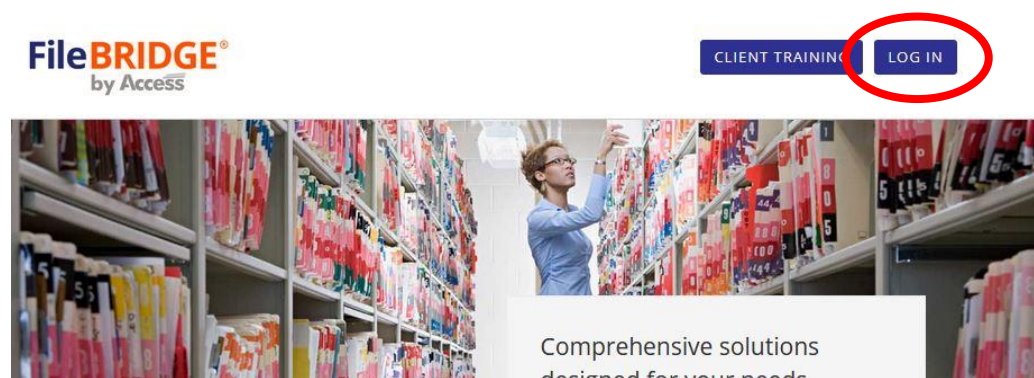
Please be aware that unless you remove a user's access when they leave your office, they may still have access to your records. The university records management program cannot monitor all employee turnover within University departments.

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

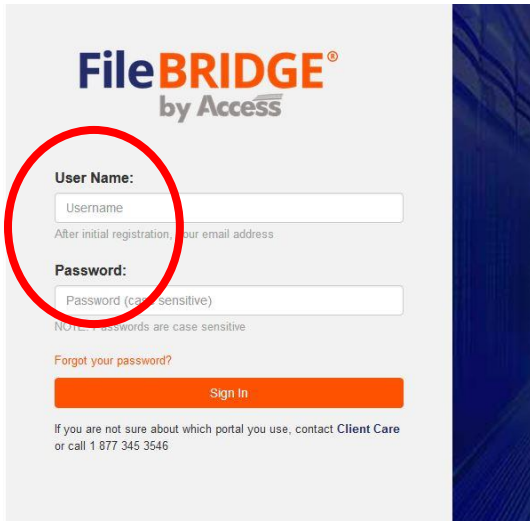
II. Getting Started

A. Log in

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

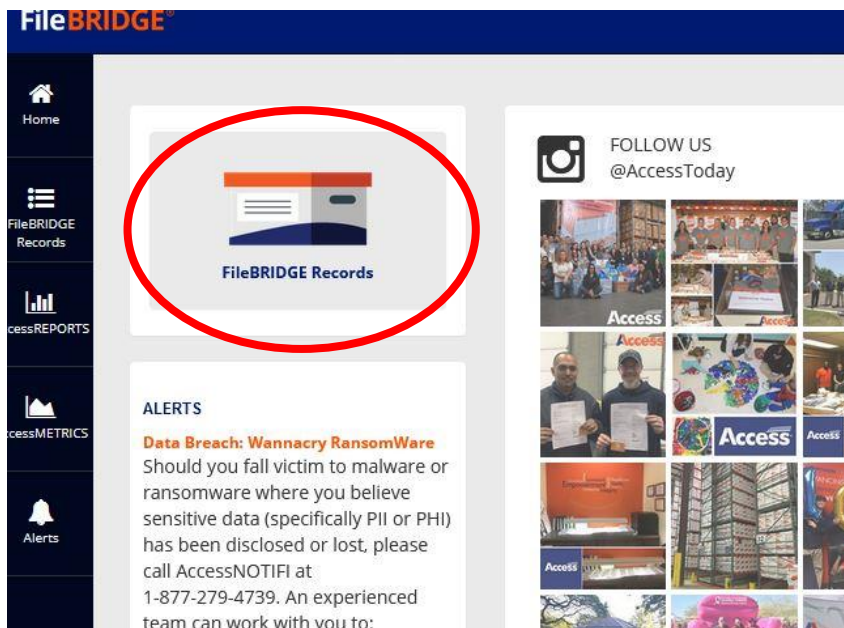


Input your user name and password as prompted and select *Sign In*. The first time you log in you will be given a temporary password, which you can subsequently reset to a password of your choice.



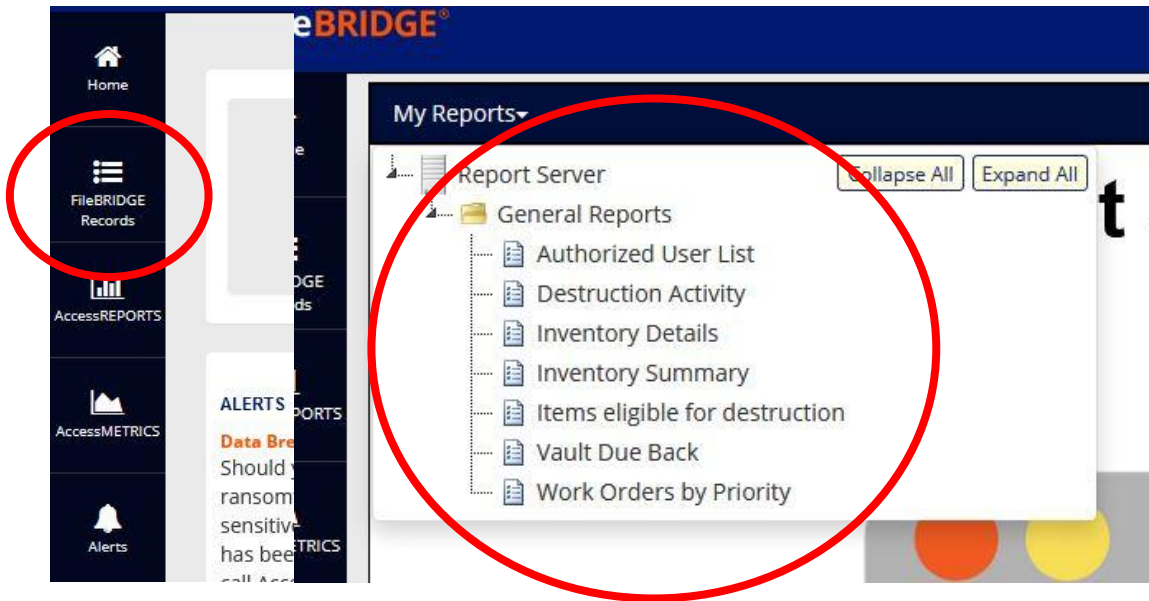
B. Access Portal

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*.

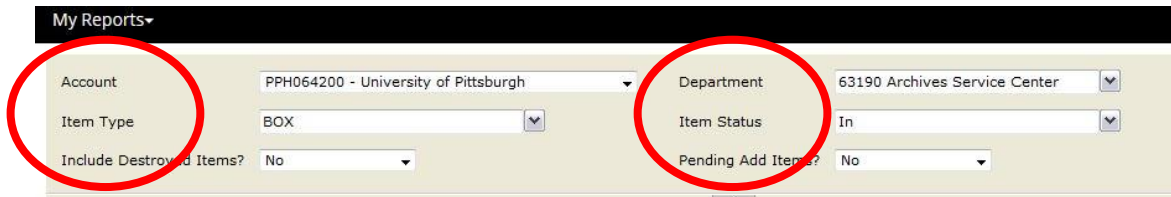


C. Access Reports

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.

Kindly contact your Access Client Care Team with any questions or concerns you may have. We will be glad to help.

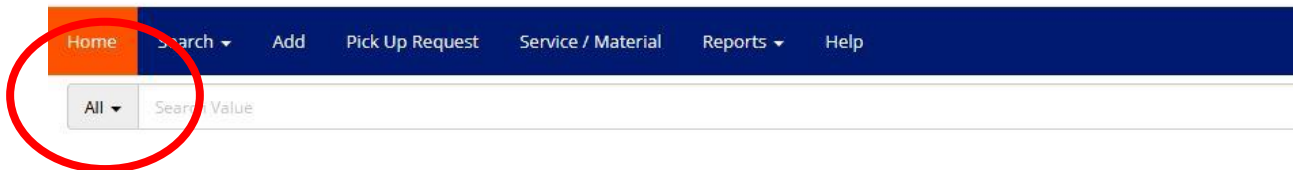
Client Care West can be reached at 1.844.345.3546 or ClientCareWest@accesscorp.com
Client Care East is available at 1.888.869.2767 or ClientCareEast@accesscorp.com

<p>Search</p>  <p>Search all record types (i.e., boxes, files and media). Request pick-up or delivery based on search results.</p>	<p>Add</p>  <p>Request non-itemized pick-up of records (i.e., boxes, files and media).</p>	<p>Pick Up Request</p>  <p>Manage on site batches by editing a batch, closing a batch or print the batch and barcode labels.</p>	<p>Service / Material</p>  <p>Run live reports on a variety of information, including inventory, invoices and more.</p>	<p>Reports</p> 
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All services should be similar to current Access service requests and have the same requirements and procedures.

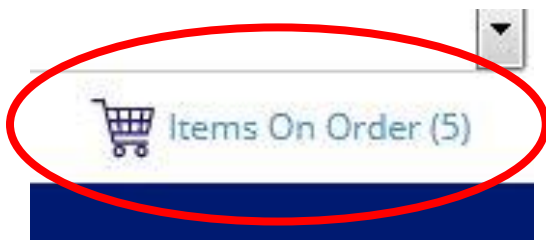
A. Search Value

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).



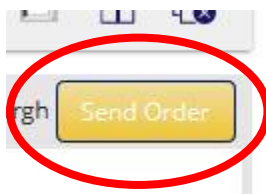
Upon clicking *Items On Order*, you'll see your order listed. Use this screen to *Send Order*, or *Remove Items* you selected.

Showing 1 - 5 of 5

PPH064200: University of Pittsburgh Send Order

 Remove  <input checked="" type="checkbox"/> selected	Service / Material: BX-STDCP - 2 Piece 1.2 Access Storage Containers Access Center: PA-Pittsburgh Customer: PPH064200:University of Pittsburgh Department: 63190.Archives Service Center Quantity: 10
  Remove  <input checked="" type="checkbox"/> selected Pick Up	Item Type: BOX Access Center: PA-Pittsburgh Customer: PPH064200:University of Pittsburgh Quantity: 4
  Remove  <input checked="" type="checkbox"/> selected Retrieve for Alex Toner	Item Code: 12748668 Access Center: PA-Pittsburgh Customer: PPH064200:University of Pittsburgh Department: 63190.Archives Service Center Ref 2: Seq Begin: 34 Ref 10: Description: REAL ESTATE, CARS, INSURANCE, SAFETY DEPOSIT BOX INFO, MEDICAL RECORDS, LEASES, BILLS Date Added To BRM: 04/13/2010 Destroy Date: 04/01/2020 From Date: 01/01/1998 To Date: 01/01/2007
  Remove  <input checked="" type="checkbox"/> selected Retrieve for Alex Toner	Item Code: 12748669 Access Center: PA-Pittsburgh Customer: PPH064200:University of Pittsburgh Department: 63190.Archives Service Center Ref 2: Seq Begin: 35 Ref 10: Description: REAL ESTATE, CARS, INSURANCE, SAFETY DEPOSIT BOX INFO, MEDICAL RECORDS, LEASES, BILLS Date Added To BRM: 04/13/2010 Destroy Date: 04/01/2020 From Date: 01/01/1998 To Date: 01/01/2007
  Remove  <input checked="" type="checkbox"/> selected Retrieve for Alex Toner	Item Code: 12748670 Access Center: PA-Pittsburgh Customer: PPH064200:University of Pittsburgh Department: 63190.Archives Service Center Ref 2: Seq Begin: 36 Ref 10: Description: REAL ESTATE, CARS, INSURANCE, SAFETY DEPOSIT BOX INFO, MEDICAL RECORDS, LEASES, BILLS Date Added To BRM: 04/13/2010 Destroy Date: 04/01/2020 From Date: 01/01/1998 To Date: 01/01/2007

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.

Complete Send Order

PPH064200 University of Pittsburgh

Delivery Address

<input type="text" value="63190"/>	<input type="text" value="7500 Thomas Boulevard"/>
Select Delivery Address	Address
<input type="text" value="Room 221 Archives Service Center"/>	<input type="text" value="Pittsburgh"/>
Building/Floor/Room/Suite/Dept	City
<input type="text" value="Pa"/>	<input type="text" value="15260"/>
State	Zip

Order Information

<input type="text"/>	<input type="text" value="Standard Delivery/Pickup"/>
Customer Order Reference	Select Delivery Priority
<input type="text" value="63190.Archives Service Center"/>	
Charge to Department	

Comments

Send

Cancel

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).

A screenshot of a web application interface titled "Advanced Inventory Search". The form contains several dropdown menus: "Customer" (PA-Pittsburgh.PP00642RC.University of Pittsbur), "Department" (All), "Type" (BOX), "Service Code" (All), and "Item Status" (All). At the bottom of the form are two buttons: "Search" and "New Search". A red circle is drawn around the "Type" and "Item Status" dropdown menus.

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.

Item Results
Showing Items per page 20

Status
 Request (678)
 Send For Refile (219)

Access Center
 PA-Pittsburgh (897)

Customer
 PPH064200 University of Pittsburgh (897)
For: Alex Toner

Department
 63190.Archives Service Center (897)

Item Type
 BOX (897)

Showing 1 - 20 of 897

Sort by Item Code

		Item Code: 12748668 Access Center: PA-Pittsburgh Customer: PPH064200:University of Pittsburgh Department: 63190.Archives Service Center Ref 2: Seq Begin: 34 Ref 10: Description: REAL ESTATE, CARS, INSURANCE, SAFETY DEPOSIT BOX INFO, MEDICAL RECORDS, LEASES, BILLS Date Added To BRM: 04/13/2010 Destroy Date: 04/01/2020 From Date: 01/01/1998 To Date: 01/01/2007
		Item Code: 12748669 Access Center: PA-Pittsburgh Customer: PPH064200:University of Pittsburgh Department: 63190.Archives Service Center Ref 2: Seq Begin: 35 Ref 10: Description: REAL ESTATE, CARS, INSURANCE, SAFETY DEPOSIT BOX INFO, MEDICAL RECORDS, LEASES, BILLS Date Added To BRM: 04/13/2010 Destroy Date: 04/01/2020 From Date: 01/01/1998 To Date: 01/01/2007
		Item Code: 12748670 Access Center: PA-Pittsburgh Customer: PPH064200:University of Pittsburgh Department: 63190.Archives Service Center Ref 2: Seq Begin: 36 Ref 10: Description: REAL ESTATE, CARS, INSURANCE, SAFETY DEPOSIT BOX INFO, MEDICAL RECORDS, LEASES, BILLS Date Added To BRM: 04/13/2010 Destroy Date: 04/01/2020 From Date: 01/01/1998 To Date: 01/01/2007
		Item Code: 12748671 Access Center: PA-Pittsburgh Customer: PPH064200:University of Pittsburgh Department: 63190.Archives Service Center Ref 2: Seq Begin: 39 Ref 10: Description: MAGAZINES AND PERIODICALS WHERE G STERNS POEMS HAVE APPEARED; DUPLICATES Date Added To BRM: 04/13/2010 Destroy Date: 04/01/2020
		Item Code: 12748672 Access Center: PA-Pittsburgh Customer: PPH064200:University of Pittsburgh Department: 63190.Archives Service Center Ref 2: Seq Begin: 49 Ref 10: Description: TAXES AND FINANCIAL RECORDS Date Added To BRM: 04/13/2010 Destroy Date: 04/01/2020 From Date: 01/01/1967 To Date: 01/01/1979

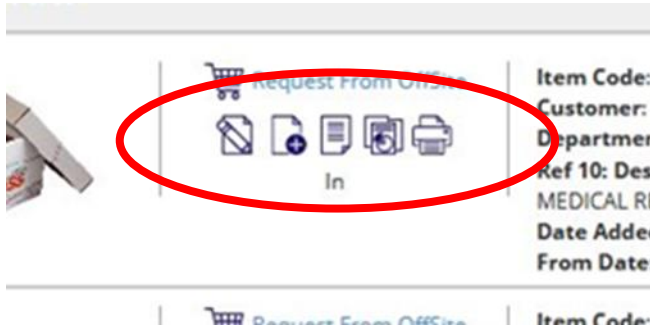
Once the search has generated results, select *Excel Exports* in the upper right corner to generate an excel inventory report of your department's holdings.

Sort by Item Code

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

Item Code:
Customer:
Department:
Ref 10: Des
MEDICAL RE
Date Add
From Date:

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*.

Enter Search Values

Item Code	Equals	▼	Search Value
Ref 1: Alt Id	Equals	▼	Search Value
Ref 2: Seq Begin	Equals	▼	Search Value
Ref 3: Seq End	Equals	▼	Search Value
Ref 4: Cust 1	Equals	▼	Search Value
Reference 9	Equals	▼	Search Value
Ref 10: Description	Equals	▼	Search Value
Date Added To BRM	Equals	▼	
Destroy Date	Equals	▼	
From Date	Equals	▼	
To Date	Equals	▼	

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.”

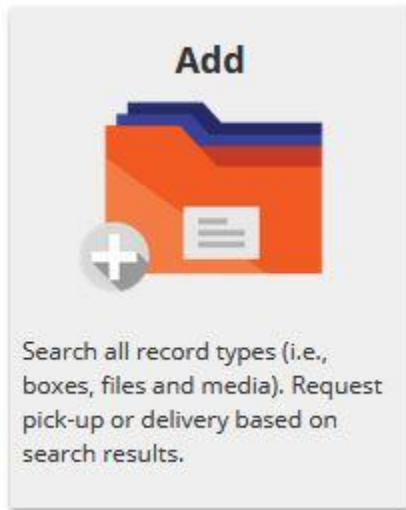
When you’ve completed your selection hit *Save*. Your order will be saved and the prompt box will be reset. Continue to order supplies if necessary, otherwise hit close.

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*.

Add Item

Customer PA-Pittsburgh.PP00642RC.University	Department Select Department	Type BOX	Requested For Alex Toner
<input type="checkbox"/> Retain data entered on add			
Item Code	Alternate code	Category Code	
Description			
Schedule Code	Destroy Date	From Date	
To Date	Cycle	Sequence	

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.

Add Item

Customer: PA-Pittsburgh.PPH064200.University | Department: 63190.Archives Service Center | Type: BOX | Requested For: Alex Toner

Retain data entered on add

Item Code: [] | Ref 1: Alt Id: [] | Ref 2: Seq Begin: []

Ref 3: Seq End: [] | Ref 4: Cust 1: [] | Reference 9: []

Ref 10: Description: []

Destroy Date: [] | From Date: [] | To Date: []

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.

Pick Up Items

Customer: PA-Pittsburgh.PPH064200.University of F

Type: BOX

Quantity: 0



Save Close

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."