

## Overview

InfoResources Client Portal is a faster, smarter client web interface for customers to use when accessing, updating or viewing their inventory. Search features in Client portal provide an easy way to search the system inventory and request delivery/pickup and other services.

## Performing a Quick Search

After logging into the Client portal, customers can access the Search menu option right on the Home page (Fig. 1).

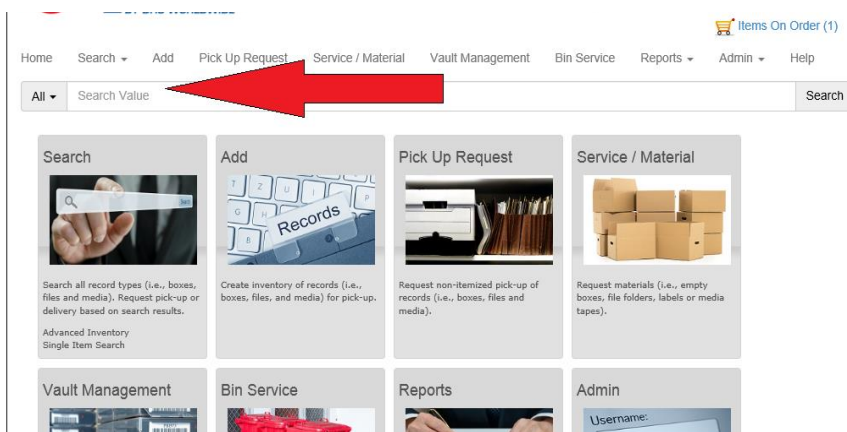


Fig. 1

From the Search bar, type in a search value to return results that selected Reference Field or item barcode number at the left, or use the **All** option to search across all available reference fields. Press the <Search> button to return the results (Fig. 2).

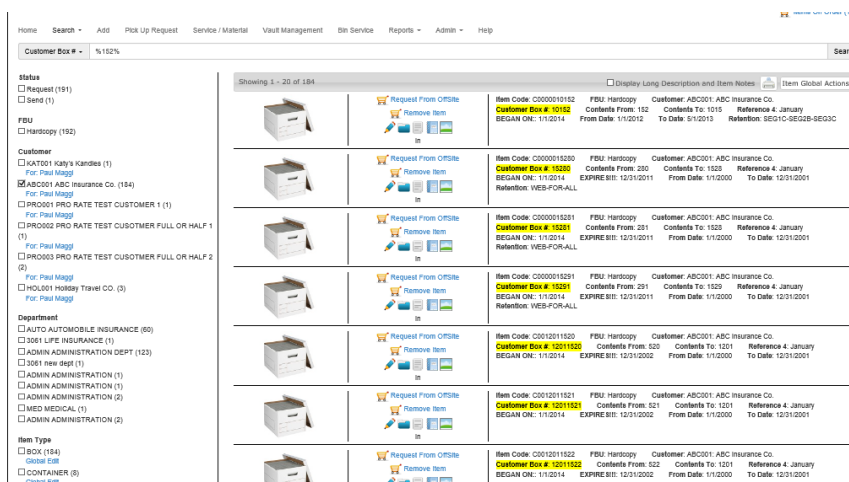


Fig. 2

Searching across *All* reference fields is the default search option.

Reference field value matches are highlighted in **yellow**.

Inventory searches can be performed across all customer accounts that the logged in user has access to, or restricted to a single customer account’s inventory by using the dropdown menu at the top right corner of the page, below the user’s name.

Wild card searches are also supported. Use the “%” character to indicate a wildcard search. The default search behavior is the search for matches that *begin with* the value entered (i.e. ‘VALUE%’). Using wildcard searches also allow for a search for inventory that *ends with* the value entered (i.e. ‘%VALUE’) or *contains* the value entered (i.e. ‘%VALUE%’).

Wildcard searches are supported when searching individual reference fields or when searching *All* reference fields.

*PLEASE NOTE: Wildcard searches across All reference fields may result in a longer search time when compared with searches against a single reference field. Also, wildcard searches for matches containing longer text values may take longer than wildcard searches for matches containing shorter text values.*

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 inventory status (in/out), customers, departments, item types, etc. (Fig. 3).

Status

☐ Request (191)

☐ Send (1)

FBU

☐ Hardcopy (192)

Customer

☐ KAT001 Katy's Kandles (1)  
[For: Paul Maggi](#)

☒ ABC001 ABC Insurance Co. (184)  
[For: Paul Maggi](#)

☐ PRO001 PROCUSTOMER 1 (1)  
[For: Paul Maggi](#)

☐ PRO002 PROCUSTOMER 2 (1)  
[For: Paul Maggi](#)

☐ PRO003 PROCUSTOMER 3 (2)  
[For: Paul Maggi](#)

☐ HOL001 Holiday Travel CO. (3)  
[For: Paul Maggi](#)

Department

☐ AUTO AUTOMOBILE INSURANCE (60)

☐ 3061 LIFE INSURANCE (1)

☐ ADMIN ADMINISTRATION DEPT (123)

☐ 3061 new dept (1)

☐ ADMIN ADMINISTRATION (1)

☐ ADMIN ADMINISTRATION (1)

☐ ADMIN ADMINISTRATION (2)

☐ MED MEDICAL (1)

☐ ADMIN ADMINISTRATION (2)

Item Type

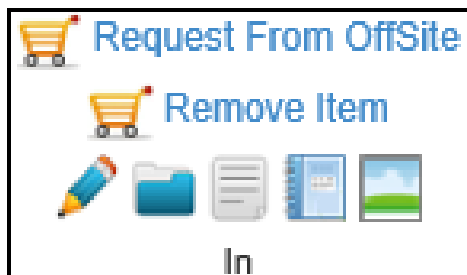
☐ BOX (184)  
[Global Edit](#)

☐ CONTAINER (8)  
[Global Edit](#)

Fig. 3

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

Use the action menu to select the appropriate action for the appropriate record in the search results (Fig. 4).



**Fig. 4**

**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.

**Request from Offsite** – Click on this option to add the item to the shopping cart as a request for delivery.

**Send Offsite** – Click on this option to add the item to the shopping cart as a request for pickup.

**Remove Item** – Click on this option to add the item to the shopping cart as a request for removal (or destruction) from inventory.



**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. 5).

**Fig. 5**

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.



**Add Item to Parent** – Press this button add new child items to the existing parent item in inventory (e.g. add files to a box). The Add item screen will be displayed (Fig. 6).

Requested	Department	FILE #	LUNAR CRATER	WILDLIFE
Paul Maggi	ADMIN	25214-C	Chappell	Citrine wagtail
Paul Maggi	ADMIN	25214-B	Blackett	Northern gannet
Paul Maggi	ADMIN	25214-A	Bianchini	Arizona myotis

Fig. 6

Enter in the appropriate reference field and other relevant information for the new child item, as needed. Items added to the parent item in the current web session will be listed at the bottom of the Add Item screen. Press the <Save> button to add the new child item to the parent. The new item will be added to the list at the bottom after saving. Data entered into the available reference fields will be retained for any new adds. Press the <Close> button to return to the search results when finished adding new items to the parent.

**PLEASE NOTE:** Items added to the parent in this manner will create Add lines on the web order. Items added to the system using the <Add Item to Parent> will not also be requested for delivery.




**Request Non-Indexed Contents** – Press this button add new child items to the existing parent item in inventory (e.g. add files to a box) while at the same time, requesting these new items for delivery. The Add item screen will be displayed (Fig. 7).

Requested	Department	FILE #	LUNAR CRATER	WILDLIFE
Paul Maggi	ADMIN	25214-C	Chappell	Citrine wagtail
Paul Maggi	ADMIN	25214-B	Blackett	Northern ganne
Paul Maggi	ADMIN	25214-A	Bianchini	Arizona myotis I

Fig. 7

Enter in the appropriate reference field and other relevant information for the new child item, as needed. Items added to the parent item in the current web session will be listed at the bottom of the Add Item screen. Press the <Save> button to add the new child item to the parent. The new item will be added to the list at the bottom after saving. Data entered into the available reference fields will be retained for any new adds. Press the <Close> button to return to the search results when finished adding new items to the parent.

**PLEASE NOTE:** Items added to the parent in this manner will create Add lines on the web order as well as retrieval request lines to deliver the new child items added to the parent.

 **Item History Report** – Press this button to view the item history report for the selected item. The report can be printed, previewed and/or exported to multiple formats. Press the < Item History Report> button to select a format (Fig. 8).

Item History Report

Report Type

PDF

Print Close

Fig. 8

Select PDF, Image, Word, Excel or HTML format to print/preview/export the Item History report and press the <Save> button (Fig. 9).

27/03/2015 12:51		<b>Item History Report</b> DHS Worldwide Records Management Center <b>BARCODE # : C0000010152</b>				
Customer Box #	Contents From	Contents To	From Date	To Date	EXPIRES !!!	Description
10152	152	1015	01/01/2012	01/05/2013		
Work Order	Date	Action	Requested For			
6999121	16/03/2015	Refile	clancy wiggum			
6998013	12/06/2014	Refile	Tom Jackson			
6997828	25/04/2014	Retrieve	Tom Jackson			
1088960	23/02/2015	Retrieve				
1088960	23/02/2015	Pending Retrieve				
0001856	26/01/2007	Refile	Tom Jackson			
0001855	24/02/2007	Retrieve	Tom Jackson			
0001855	24/02/2007	Pending Retrieve	Tom Jackson			

**Fig. 9**



**Attach an Image to Item** – Press this button to view the Attach Image screen (Fig. 10).

Attach a file to this item.

**Fig. 10**

Press the **<Browse>** button to locate the appropriate image to be uploaded for this item using Windows Explorer on the local workstation and press the **<Upload>** button to upload the image to the web server and attach it to the item (Fig. 11).

View Image

C0000010152.pdf

**Fig. 11**

After an images have been attached to the item in inventory, press the Attach Image on the results screen to display the View Image button. Click on the name of the file to view the attachment. Press the **<Add>** button to overwrite the current image. Press the **<Close>** button to return to the search results.

**PLEASE NOTE:** Certain system settings will determine if only a single image can be attached to any given item at a time or if multiple files – in multiple formats – can be attached to a single item in inventory.

## Performing an Advanced Search

Use the **Search > Advanced Search** menu option bar to perform more advanced searches based on the criteria provided using an intuitive, a user-friendly interface to build a results set (Fig. 12).

The screenshot shows the 'Advanced Inventory Search' interface. On the left, under 'Advanced Inventory Search', there are dropdown menus for Customer (Hardcopy ABC Insurance Co.), Department (All), Type (BOX), Service Code (All), and Item Status (All). A 'Search' button is at the bottom. On the right, under 'Enter Search Values', there is a table with columns for field names, operators, and search values. The fields include BARCODE #, Customer Box #, Contents From, Contents To, Reference 4, BEGAN ON, EXPIRES, From Date, To Date, Retention, Indexed Notes, and Memo. Operators like 'Contains', 'Equals', and 'Search Value' are selected. The 'Reference 4' field has a value '01' and a clear 'X' button.

Fig. 12

Use the Advanced Inventory Search fields at the left to define the general search parameters including the customer account for which inventory will be searched, the department to which inventory belongs as well as the item type, storage code and inventory status (Fig. 13).

This is a close-up of the 'Advanced Inventory Search' section. It shows five dropdown menus: Customer (Hardcopy ABC Insurance Co.), Department (All), Type (BOX), Service Code (All), and Item Status (All). Each menu has a downward arrow icon. A 'Search' button is located at the bottom right of this section.

Fig. 13

Select the appropriate parameters from the dropdown lists provided.

Enter the search values into the available reference fields using the section at the right of the Advanced Search screen. Select the operator for each reference field (Equals, Greater Than, Less than, Is Blank, Between, Contains, In List or Ends With) to query inventory for the appropriate results. Leave any reference field search value(s) undefined if not needed for the current search (Fig. 14).

Enter Search Values

BARCODE #	Equals	<input type="text" value="Search Value"/>
Customer Box #	Equals	<input type="text" value="10"/>
Contents From	Equals	<input type="text" value="Search Value"/>
Contents To	Equals	<input type="text" value="01"/>
Reference 4	Equals	<input type="text" value="Search Value"/>
BEGAN ON:	Equals	<input type="text"/>
EXPIRES!!!	Equals	<input type="text"/>
From Date	Equals	<input type="text"/>
To Date	Equals	<input type="text"/>
Retention	Equals	<input type="text" value="Search Value"/>
Indexed Notes	Equals	<input type="text" value="Search Value"/>
Memo	Equals	<input type="text" value="Search Value"/>

Fig. 14

Press the Search button after entering the appropriate search credentials to return the expected results set (Fig. 15).

Home

Search

Add

Pick Up Request

Service / Material

Vault Management

Bin Service

Reports

Admin

Help

Status

☐ Request (233)

☐ Send (2)

FBU

☐ Hardcopy (235)

Customer

☐ ABC001 ABC Insurance Co. (235)

For: Paul Maggi

Department

☐ ADMIN ADMINISTRATION DEPT (235)

Item Type

☐ BOX (235)

Global Edit

Showing 1 - 20 of 235

☐ Display Long Description and Item Notes

Item Global Actions

Request From OffSite

Remove Item

In

Item Code: C0000010152

FBU: Hardcopy

Customer: ABC001: ABC Insurance Co.

Customer Box #: 10152

Contents From: 152

Contents To: 1015

Reference 4: January

BEGAN ON: 1/1/2014

From Date: 1/1/2012

To Date: 5/1/2013

Retention: WEB-FOR-ALL

Request From OffSite

Remove Item

In

Item Code: C0000010153

FBU: Hardcopy

Customer: ABC001: ABC Insurance Co.

Customer Box #: 10153

Contents From: 153

Contents To: 1015

Reference 4: January

BEGAN ON: 1/1/2014

EXPIRES!!!: 1/7/2015

From Date: 1/1/2000

To Date: 12/31/2001

Request From OffSite

Remove Item

In

Item Code: C0000010154

FBU: Hardcopy

Customer: ABC001: ABC Insurance Co.

Customer Box #: 10154

Contents From: 154

Contents To: 1015

Reference 4: January

BEGAN ON: 1/1/2014

EXPIRES!!!: 12/31/2023

From Date: 1/1/2000

To Date: 12/31/2013

Retention: WEB-FOR-ALL

Fig. 15

The same features and functionality detailed in the Quick Search section previously applies to the Advanced Search results.



## Adding Items on the Web

Use the **Add** menu option to easily add items to the system. Normally new parent items are added to the system in this way (i.e. Boxes). Child items (i.e. Files) are normally added using the Add Item to Parent button or the Request Non-Indexed Contents button on the search results screen, detailed in the previous sections. New items can be added to inventory quickly and easily using the Add menu option. (Fig. 16).

The screenshot shows a web form titled "Add Item". At the top, there are four dropdown menus: "Customer" (selected: "Hardcopy.ABC Ir"), "Department" (selected: "ADMIN"), "Type" (selected: "BOX"), and "Requested For" (text: "Paul Maggi"). Below these is a checkbox labeled "Retain data entered on add" which is checked. The form is divided into two columns. The left column contains: "BARCODE #" (text: "C0012140493"), "Contents From" (text: "4052"), "Reference 4" (empty), "To Date" (text: "03/08/2015"), "Indexed Notes" (empty), and "Memo" (empty). The right column contains: "Customer Box #" (text: "2521-A"), "Contents To" (text: "5127"), "From Date" (text: "03/01/2015"), "Retention" (text: "SEG1C-SEG2A-SEG3C" with a "Browse" button next to it), and a "Save" button at the bottom right.

Fig. 16

The Add Item screen is used to add new items into inventory. Select the Department (if applicable), the appropriate Item Type (if needed) and enter in the appropriate barcode number (usually provided by the records center as a pre-printed label) and reference field information for each new item to be added to inventory

**Retain Data entered on Add** – Use this option to retain any data entry values entered on the Add Item screen after the <Save> button is pressed to add new item to the web order.

Press the <Save> button to add a new Add line to the web order and save the reference field data for the newly added item into inventory.

Press the <Close> button to exit the Add Item screen and return to the View Order screen to see all items added to the current web order, including any other add, delivery and/or pickup requests that have been added to the current web order.

## Pickup Requests

Use the **Pick Up Request** menu option to easily schedule non-itemized pickup requests with the records center. The Pick Up Items screen will appear (Fig. 17).

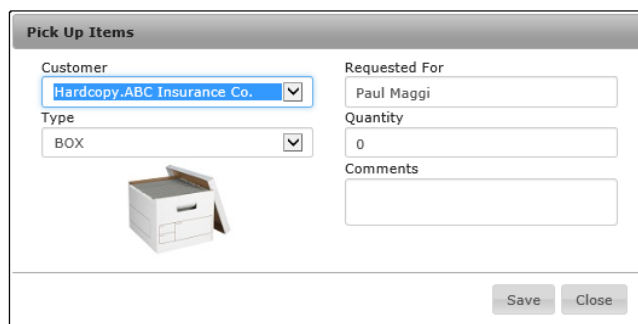


Fig. 17

Select the type of item that will be picked up and the quantity. Use the Comment's field to enter any relevant notes for this pickup request, if needed.

Press the <Save> button to add a new non-itemized pickup line to the web order.

Press the <Close> button to exit the Pick Up Items screen and return to the shopping cart.

## Miscellaneous Service / Material Requests

Use the **Service / Material** menu option to easily request miscellaneous services and/or material sales from the records center. The Service / Material screen will appear (Fig. 18).



Fig. 18

Select the type of service/ material requested and the billing department, if applicable. Enter the quantity for each service/ material requested. Use the Comment's field to enter any relevant notes for this pickup request, if needed.

Press the <Save> button to add a new service/ material request line to the web order.

Press the <Close> button to exit the Service / Material screen and return to the shopping cart.

## Submitting the Web Order

After all items have been added to the web order, view the shopping cart by clicking ***the Items on Order*** option at the top of the screen, under the logged in user name at the right (Fig. 19).

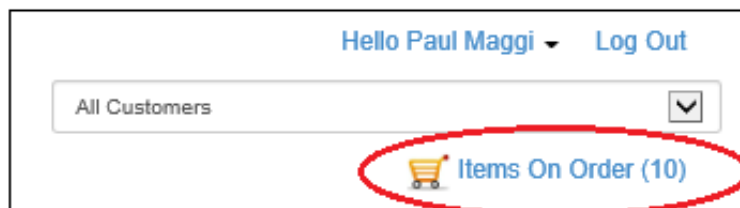


Fig. 19

**PLEASE NOTE:** If the **Add** menu option has been used, closing the Add Item screen will also display the shopping cart automatically.

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. 20).

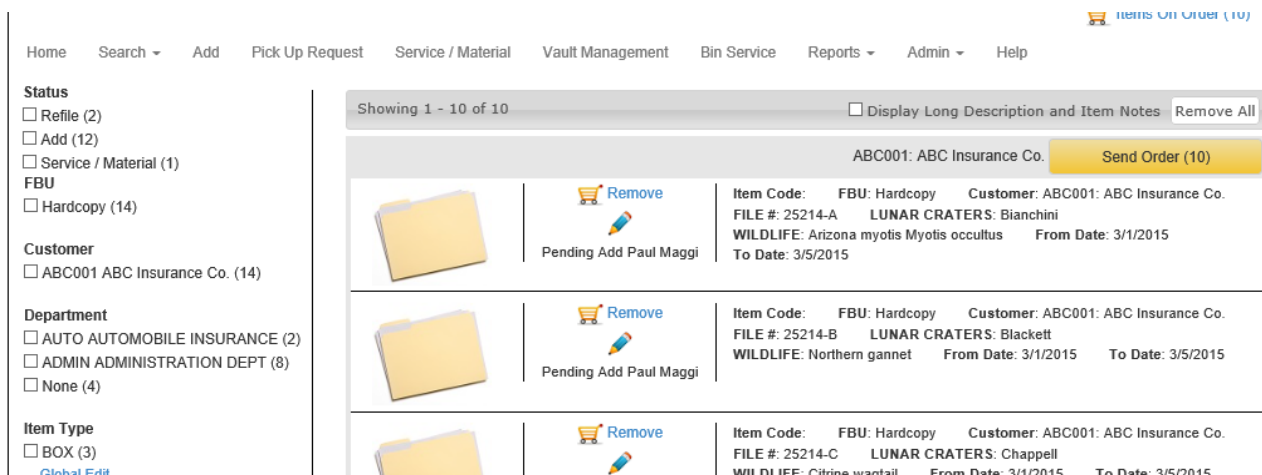


Fig. 20

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. 21).

**Status**  
☐ Refile (2)  
☐ Add (12)

**FBU**  
☐ Hardcopy (14)

**Customer**  
☐ ABC001 ABC Insurance Co. (14)

**Department**  
☐ AUTO AUTOMOBILE INSURANCE (2)  
☐ ADMIN ADMINISTRATION DEPT (8)  
☐ None (4)

**Item Type**  
☐ BOX (3)  
[Global Edit](#)  
☐ FILE (11)  
[Global Edit](#)

Fig. 21

Use the action menu to select the appropriate action for the appropriate record in the search results (Fig. 22).



Fig. 22

**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.

The Edit, Add Item to Parent, Non-Indexed Contents, Item Report and Attach Image features in the shopping cart all function the same way as the same features in the search results, detailed previously.

Use the <**Remove All**> button to remove all listed items from the shopping cart, if needed (Fig. 23).



Fig. 23

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. 24).

A rectangular box containing the text 'ABC001: ABC Insurance Co.' on the left and a yellow button labeled 'Send Order (14)' on the right.

Fig. 24

The Send Order screen will appear (Fig. 25).

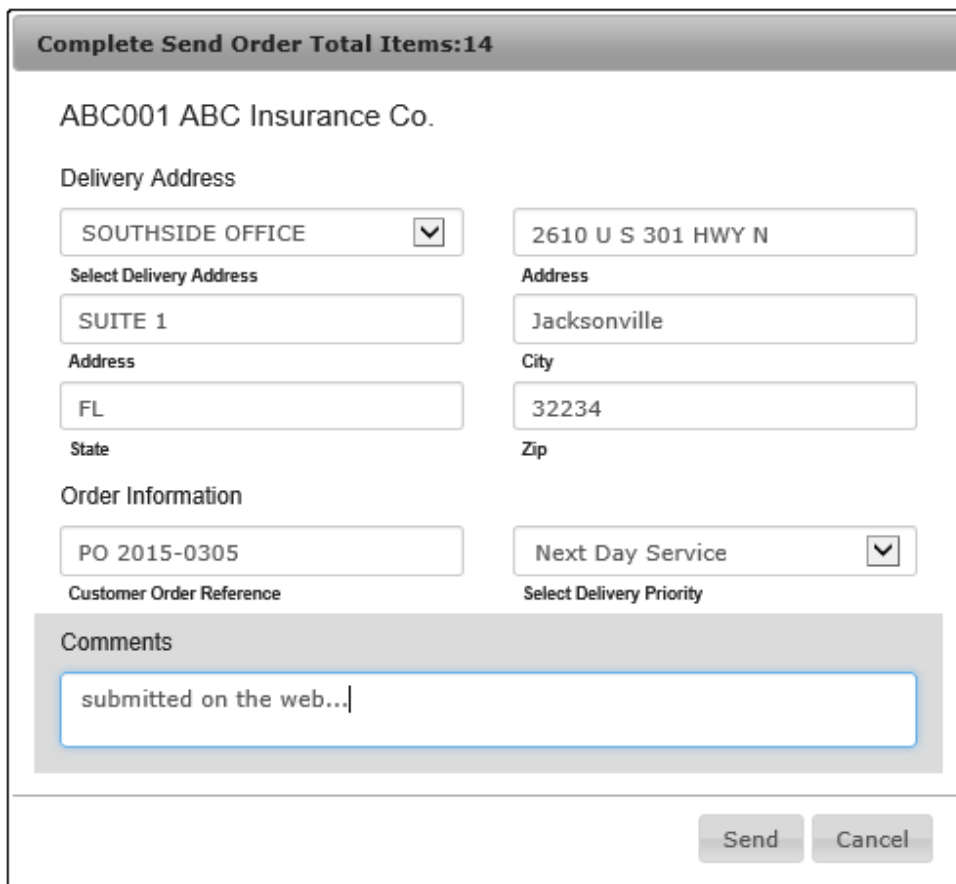
A screenshot of a web form titled 'Complete Send Order Total Items:14'. The form is for 'ABC001 ABC Insurance Co.' and contains several sections: 'Delivery Address' with fields for 'Select Delivery Address' (a dropdown menu showing 'SOUTHSIDE OFFICE'), 'Address' (text input '2610 U S 301 HWY N'), 'City' (text input 'Jacksonville'), 'State' (text input 'FL'), and 'Zip' (text input '32234'); 'Order Information' with 'Customer Order Reference' (text input 'PO 2015-0305') and 'Select Delivery Priority' (a dropdown menu showing 'Next Day Service'); and a 'Comments' section with a text area containing 'submitted on the web...'. At the bottom right are 'Send' and 'Cancel' buttons.

Fig. 25

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. 26).


HomeSearchAddPick Up RequestService / MaterialVault ManagementBin ServiceReportsAdminHelp

Items On Order (0)

PDFReport

DHS Worldwide Records Management Center

Work Order: 6999213




Due Date: 27/03/2015 5:00PM

Customer: ABC Insurance Co.

Address: SOUTHSIDE OFFICE  
2610 U S 301 HWY N  
SUITE 1  
Jacksonville, FL 32234

Requested By: Paul Maggi



Phone: Chilcoat's 727  
Customer Reference: PO 2015-0305  
Route: South - AM 1

Priority: Next Day Service

Notes: submitted on the web... CUST NOTES BEGIN:  
Closed from 12:00-1:00 daily.  
All deliveries are to be made to the South entrance by 5:00 PM.  
-- CUST NOTES END

Requested For: Paul Maggi

Item Code	Reference Info	Dept	Item Type / Action
C0012018210	User is not authorized to view item details for this department Pick up request	ADMIN	BOX Pending Refile
C0012140492	User is not authorized to view item details for this	ADMIN	BOX New Item Added

Fig. 26