



We are very excited to present our new Web Access Portal. We hope you enjoy using it. If you have any questions, please call Customer Service at (713) 694-9022.

Before we begin, there are a few important points that we wish to highlight.

When placing your order, the Delivery Priority is quite specific.

- If you are requesting boxes or files to be delivered to you, the Delivery Priority must be **Retrieval & Delivery of Records**.
- If you are adding new boxes and listing them in the order, the Delivery Priority must be **Pick up New Boxes**.
- If you are returning boxes and not listing the items in the order, the Delivery Priority must be **Pick up Returning Boxes**.



HARD COPY WEB ACCESS INSTRUCTIONS

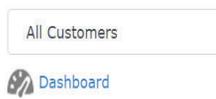


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Add Boxes

If you wish to itemize your boxes, add descriptive information and create your transmittal list, you can do that from the Add function.

1. Either select **Add** from the menu or click on the **Add** icon.



Home Search ▾ Add Pick Up Request Service / Material Reports ▾ Admin ▾ Help

All ▾ Search Value

Paper Document Scanning, Conversion, and Document Digitization Services

When you place your order online it will provide you with a WORK ORDER NUMBER which confirms that the order was accepted. Please make a note of it because it will all documentation generated as a result of this transaction.

[Click here to email us your attachment.](#)

City of Houston employees are required to input the information into the City's Records Management System prior to archiving with HCDE, per COH Policy & Procedures



2. In the **Add Item** box, select the **Department** from the drop down menu if your account uses departments.

If the descriptive data you are going to enter is repetitive, you can click the **Retain data entered on add** check box to keep the data in the fields for each box.

Add Item

Customer MAIN.HCDE.Harris County Dept c ▾	Department RECORDS MGMT.RECORDS MAN/ ▾	Type BOX ▾	Requested For ELDI
<input type="checkbox"/> Retain data entered on add			
Code 000720792	Customer Box # 1	Years In Box 2019	
Box Index A-D			
Description STUDENT RECORDS			
Expire Date 1 09/30/2026			

3. Enter the **Barcode** number (including leading zeros) and the descriptive information.
4. Click on the **Save** button.

The barcode number and client box number are already related, so you do not need to add the client box number.

As you add each box, it will appear on the grid behind the **Add Item** box.

You can click on the pencil icon to edit any information.

Showing 1 - 2 of 2

HCDE: Harris County Dept of Ed Send Order

	 Remove  Add for ELDI <input checked="" type="checkbox"/> selected	Barcode: 000720792 FBU: MAIN Customer: HCDE:Harris County Dept of Ed Department: RECORDS MGMT.RECORDS MANAGEMENT Customer Box #: 1 Years In Box: 2019 Box Index: A-D Description: STUDENT RECORDS Expire Date 1: 09/30/2026
	 Remove  Add for ELDI <input checked="" type="checkbox"/> selected	Barcode: 000720793 FBU: MAIN Customer: HCDE:Harris County Dept of Ed Department: RECORDS MGMT.RECORDS MANAGEMENT Customer Box #: 2 Years In Box: 2019 Box Index: E-M Description: STUDENT RECORDS Expire Date 1: 09/30/2026

5. Click on the **Send Order** button.
6. In the **Complete Send Order** box, select the **Delivery Address** from the drop down menu.

If you want to enter notes for yourself enter them in **Customer Order Reference**.

7. Change the **Delivery Priority** to **Send to HCDE RM**.
8. If you have any comments regarding delivery (Use freight elevator, loading dock closed between noon and 1pm, etc.) or an alternate contact in case you're not available to accept delivery enter into the **Comments** field.
9. Click on the **Send** button.

Complete Send Order - HCDE Harris County Dept of Ed

Delivery Address

RECORDS NPO	6005 WESTVIEW
Select Delivery Address	Address
RECORDS MANAGEMENT	HOUSTON
Address	City
TX	77055
State	Zip

Order Information

Subpoena	Retrieval & Delivery of Records
Customer Order Reference	Select Delivery Priority
RECORDS MGMT.RECORDS MA	
Charge to Department	

Comments

Please call 713.694.9022 upon arrival.]



Send Cancel

Once submitted, a report with your Work Order number and order details will appear. You can print by selecting the Report button and pick your preferred type of report from the drop down. Depending on which browser you are using, you can either print directly or download and print.

Itemize Files in Box

1. Follow instructions above to Add New Box or Search for existing box.
2. After the box(es) is displayed in the grid, click on the folder icon to itemize the files in the box.

Showing 1 - 2 of 2

HCDE: Harris County Dept of Ed Send Order

	  <input checked="" type="checkbox"/> selected Add for ELDI	Barcode: 000720792 FBU: MAIN Customer: HCDE:Harris County Dept of Ed Department: RECORDS MGMT.RECORDS MANAGEMENT Customer Box #: 1 Years In Box: 2019 Box Index: A-D Description: STUDENT RECORDS Expire Date 1: 09/30/2026
	  <input checked="" type="checkbox"/> selected Add for ELDI	Barcode: 000720793 FBU: MAIN Customer: HCDE:Harris County Dept of Ed Department: RECORDS MGMT.RECORDS MANAGEMENT Customer Box #: 2 Years In Box: 2019 Box Index: E-M Description: STUDENT RECORDS Expire Date 1: 09/30/2026

3. A new **Add Item** box will appear with the box barcode in the **Parent Item Code** field.

Add Item

Parent Item Code 000720792 <input type="checkbox"/> Retain data entered on add	Department RECORDS MGMT.RECORDS MANA	Type FILE	Requested For ELDI
Customer File # You can enter student name			
Index Item Id Student ID #			

Save Close

4. Add descriptive information for files.
5. Click on **Save**.

When done adding files, they will appear on the grid with the boxes. The barcode will show as "unknown", as it is not added until the files are scanned.

You can remove from the cart or edit, as needed.

Complete Send Order - HCDE Harris County Dept of Ed

Showing 1 - 3 of 3



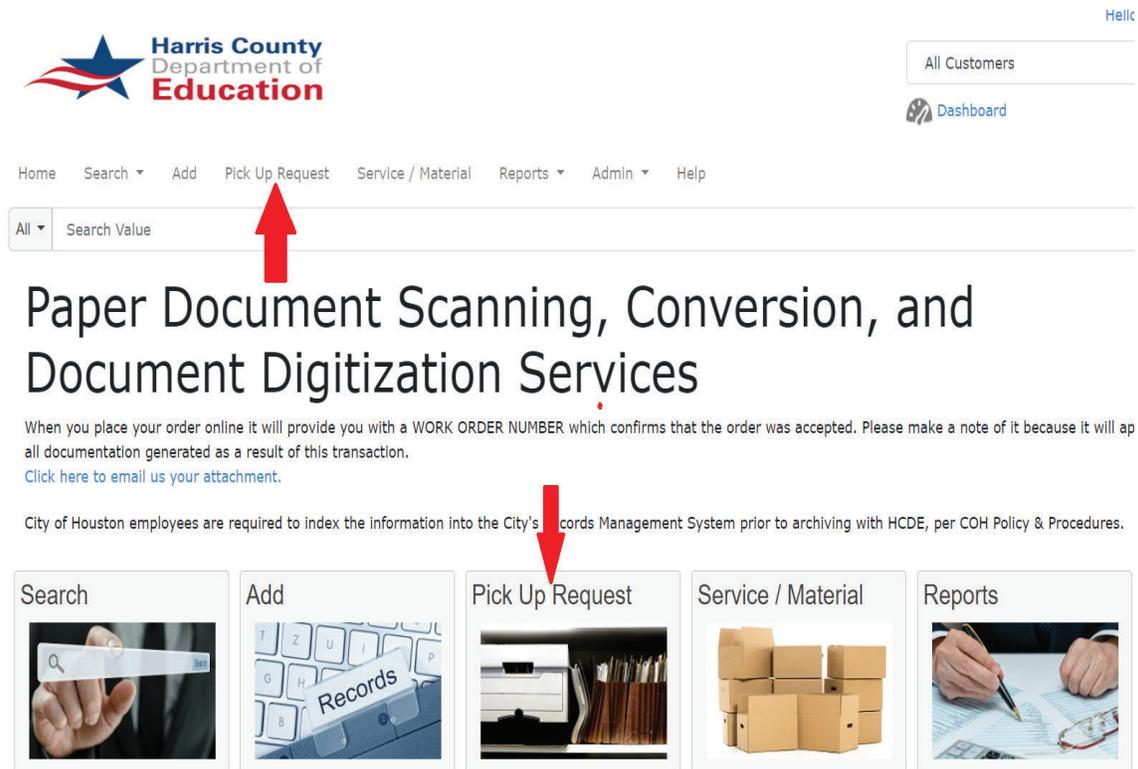
HCDE: Harris County Dept of Ed [Send Order](#)

	Remove Add for ELDI <input checked="" type="checkbox"/> selected	Barcode: Unknown Parent Item Code: 000720792 FBU: MAIN Customer: HCDE:Harris County Dept of Ed Department: RECORDS MGMT.RECORDS MANAGEMENT Customer File #: Eldi Records Index Item Id: 9022
	Remove Add for ELDI <input checked="" type="checkbox"/> selected	Barcode: 000720792 FBU: MAIN Customer: HCDE:Harris County Dept of Ed Department: RECORDS MGMT.RECORDS MANAGEMENT Customer Box #: 1 Years In Box: 2019 Box Index: A-D Description: STUDENT RECORDS Expire Date 1: 09/30/2026
	Remove Add for ELDI <input checked="" type="checkbox"/> selected	Barcode: 000720793 FBU: MAIN Customer: HCDE:Harris County Dept of Ed Department: RECORDS MGMT.RECORDS MANAGEMENT Customer Box #: 2 Years In Box: 2019 Box Index: E-M Description: STUDENT RECORDS Expire Date 1: 09/30/2026

Request a Pick Up

You can request a pick up of boxes or files without itemizing the list on the web. You will need to complete a transmittal manually or electronically to accompany your shipment.

1. Either select **Pick Up Request** from the menu or click on the **Pick Up Request** icon.



The screenshot shows the Harris County Department of Education website. The navigation menu includes Home, Search, Add, Pick Up Request, Service / Material, Reports, Admin, and Help. A red arrow points to the 'Pick Up Request' menu item. Below the navigation is a search bar with a dropdown menu set to 'All' and a search value field. The main content area features a large heading: 'Paper Document Scanning, Conversion, and Document Digitization Services'. Below the heading is a paragraph of text: 'When you place your order online it will provide you with a WORK ORDER NUMBER which confirms that the order was accepted. Please make a note of it because it will appear on all documentation generated as a result of this transaction. [Click here to email us your attachment.](#)' A second red arrow points to the 'Pick Up Request' icon in a row of service icons, which also includes Search, Add, Service / Material, and Reports.

2. Enter the number of boxes to be picked up in the **Quantity** field.
3. Click on the **Save** button.

Pick Up Items

Customer	MAIN.HCDE.Harris County Dept of E	Type	BOX
Quantity	15		

The order will appear on the grid. If you need to make any changes, simply click on the pencil icon. If you need to remove anything, click on the **Remove** button.

4. When your order is complete, click on the **Send Order** button.

Showing 1 - 3 of 3

HCDE: Harris County Dept of Ed **Send Order**

Remove **Item Type: BOX** **FBU: MAIN**
Customer: HCDE:Harris County Dept of Ed **Quantity: 15**

selected
Pick Up

Pick Up Items

Customer: MAIN.HCDE.Harris County Dept of Ed
Type: BOX
Quantity: 15

Save Close

5. Select the **Delivery Address** from the drop down menu.

6. Change the **Delivery Priority** to **Pick Up**.

7. If you have any comments regarding the pickup (Use freight elevator, loading dock closed between noon and 1pm, etc.) enter into the **Comments** field.

8. Click on the **Send** button.

Complete Send Order - HCDE Harris County Dept of Ed

Delivery Address

<input type="text" value="RECORDS NPO"/> <small>Select Delivery Address</small>	<input type="text" value="6005 WESTVIEW"/> <small>Address</small>
<input type="text" value="RECORDS MANAGEMENT"/> <small>Address</small>	<input type="text" value="HOUSTON"/> <small>City</small>
<input type="text" value="TX"/> <small>State</small>	<input type="text" value="77055"/> <small>Zip</small>

Order Information

<input type="text" value="returns"/> <small>Customer Order Reference</small>	<input type="text" value="Pick up Returning Boxes"/> <small>Select Delivery Priority</small>
<input type="text" value="RECORDS MGMT.RECORDS MA"/> <small>Charge to Department</small>	

Comments

Once submitted, a report with your Work Order number and order details will appear. You can print by selecting the Report button and pick your preferred type of report from the drop down. Depending on which browser you are using, you can either print directly or download and print.

Search for Boxes or Files

You can search for boxes using the Search field or Advanced Search.

Search Field

1. From the Home Screen, enter box number, barcode or descriptive information in the Search box.
2. Click on the **Search** button.

The screenshot displays the Harris County Department of Education search interface. At the top, there is a navigation menu with options like Home, Search, Add, Pick Up Request, Service / Material, Reports, Admin, and Help. A search bar is present with a dropdown menu set to 'All' and a 'Search' button. A red arrow points to the 'Search' button. Below the search bar, the search results are displayed for the value '000106392'. A red arrow points to the search value. The results include a box image, a 'Request From OffSite' button, a 'Remove Item' button, and a 'selected' checkbox. The description of the box is 'INVOICES'.

This will search across all fields and will return anything with any or all of the search criteria.

From the Search Results, you can export an inventory to excel, request boxes be delivered to you or return boxes that you've already accessed.

Advanced Search

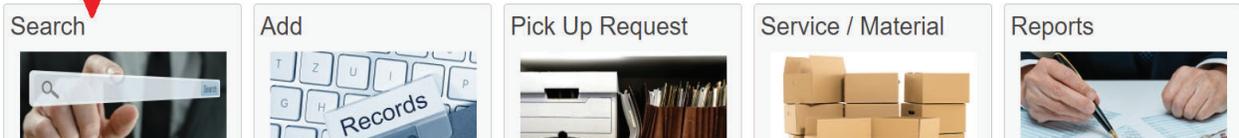
You can do a more defined search for boxes or files, if itemized.

1. Either select **Advanced Inventory Search** from the **Search** menu or click on the **Search** icon.

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[Click here](#) [email us your attachment](#).

City of Houston employees are required to index the information into the City's Records Management System prior to archiving with HCDE, per COH Policy & Procedures.



- Use the Advanced Inventory Search section on the left side of the screen to Search by Department, Search by Type (boxes or files) or Search by Item Status (in, out, permanently removed or destroyed).

Home / Search / Advanced Inventory Search

Advanced Inventory Search

Customer: MAIN.HCDE.Harris County Dept of Ed

Department: RECORDS MGMT.RECORDS MANAGEMEN

Type: BOX

Service Code: All

Item Status: In / Out

Retrieved By: Equi

Enter Search Values

Barcode	Equals	Search Value
Customer Box #	Equals	Search Value
Years In Box	Equals	2002-03
Box Index	Equals	Search Value
Description	Equals	Search Value
Expire Date 1	Equals	

- Your customized field headers will show on the right side of the screen. You can use any or all fields. The more fields you use, the more specific your results will be. You can use any of the parameters to define your search.

- Click on **Search** button.

Note: If you don't select any search criteria, your entire inventory will be returned.



	<p> Request From OffSite</p> <p> Remove Item</p> <p> </p> <p><input checked="" type="checkbox"/> selected</p> <p>In</p>	<p>Barcode: 000054353 FBU: MAIN</p> <p>Customer: HCDE:Harris County Dept of Ed</p> <p>Department: RECORDS MGMT.RECORDS MANAGEMENT</p> <p>Years In Box: 2001 Box Index: MAY-AUG</p> <p>Description: INVOICES Expire Date 1: 09/01/2008</p>
	<p> Request From OffSite</p> <p> Remove Item</p> <p> </p> <p><input checked="" type="checkbox"/> selected</p> <p>In</p>	<p>Barcode: 000054354 FBU: MAIN</p> <p>Customer: HCDE:Harris County Dept of Ed</p> <p>Department: RECORDS MGMT.RECORDS MANAGEMENT</p> <p>Years In Box: 1995-97 Description: INVOICES</p> <p>Expire Date 1: 09/01/2004</p>
	<p> Request From OffSite</p> <p> Remove Item</p> <p> </p> <p><input checked="" type="checkbox"/> selected</p> <p>In</p>	<p>Barcode: 000054355 FBU: MAIN</p> <p>Customer: HCDE:Harris County Dept of Ed</p> <p>Department: RECORDS MGMT.RECORDS MANAGEMENT</p> <p>Years In Box: 2001 Box Index: SEPT-DEC</p> <p>Description: INVOICES Expire Date 1: 09/01/2008</p>
	<p> Request From OffSite</p> <p> Remove Item</p> <p> </p> <p><input checked="" type="checkbox"/> selected</p> <p>In</p>	<p>Barcode: 000054356 FBU: MAIN</p> <p>Customer: HCDE:Harris County Dept of Ed</p> <p>Department: RECORDS MGMT.RECORDS MANAGEMENT</p> <p>Years In Box: 2000 Description: INVOICES</p> <p>Expire Date 1: 09/01/2007</p>

Search Grid Descriptions

Left column: This column shows the type of record. In the results shown above, you'll see that we have only boxes. If there were files in inventory, they would have a file icon on the left.

Middle column: This column shows the status of the record and also provides options for inventory transactions for the item.

Right column: This column provides information about the box or file.

If your box is retrieved at the client offsite. Using the Shopping Cart icon or **Send to Offsite** link, this box can be added to an order to return to HCDE. The pencil icon allows you to edit the descriptive information. The folder icon will allow you to add itemized files to a box and the notebook icon will bring up the history of all activity of that box.

In the example above, the boxes are at HCDE site and can be requested for delivery with the shopping cart icon or the **Request From OffSite** link.

The icons on the top right will allow you to change the sort order of your results, display the long description (if used), export the inventory (printer icon) or make global edits to the results (clipboard icon).

Request or Return Boxes using Search Results

Follow instructions above to search for boxes to **request** from HCDE or **return** to HCDE.

1. Once results appear in the grid, click on the **Send to OffSite** button or **Request from OffSite** button in the center column to request boxes from HCDE or return boxes to HCDE.

Please note that you can not request items be sent to you and send items to HCDE on the same order. You will need to process two separate transactions.

2. Add the items to the shopping cart by clicking on the **Add Results to Cart** button.

3. Click on the **Send Order** button.

4. Select the **Delivery Address** from the drop down menu.

If you want to enter notes for yourself enter them in Customer Order Reference. (Example: Subpoena)

5. Change the **Delivery Priority** to **Pick up Returning Boxes** for returning boxes and **Retrieval & Delivery** for boxes delivered to you.

6. If you have any comments regarding delivery (Use freight elevator, loading dock closed between noon and 1pm, etc.) or an alternate contact in case you're not available to accept delivery enter into the **Comments** field.

7. Click on the **Send** button.

Complete Send Order - HCDE Harris County Dept of Ed

Delivery Address

RECORDS NPO	6005 WESTVIEW
Select Delivery Address	Address
RECORDS MANAGEMENT	HOUSTON
Address	City
TX	77055
State	Zip

Order Information

2019 records	Pick up Returning Boxes
Customer Order Reference	Select Delivery Priority
RECORDS MGMT.RECORDS MA	
Charge to Department	

Comments

2nd floor Room 214

Send Cancel

Once submitted, a report with your Work Order number and order details will appear. You can print by selecting the Report button and pick your preferred type of report from the drop down. Depending on which browser you are using, you can either print directly or download and print.

Request Boxes from HCDE

Boxes can be requested from Search Results on Home Screen.

1. Select Enter data in Search Values on the right of the screen.

Depending on how you would like to search (Client Box #, Barcode, Description), select reference from the Select Key Reference Field drop down menu on the left side of the screen.

2. The data you key here must be exact, including leading zeros. You can either key the search values, returning after each one, or paste from a spreadsheet.
3. Select **Search**
4. Select **Request From OffSite**
5. Click on Shopping Cart button.  **Items On Order (5)**
The requested boxes will be placed in a grid. You can remove any if necessary using the Remove button next to the shopping cart icon.

The order will appear on the grid. If you need to make any changes, simply click on the pencil icon. If you need to remove anything, click on the Remove button.

6. When your order is complete, click on the Send Order button.
7. Select the **Delivery Address** from the drop down menu.
8. Change the Delivery Priority to **Retrieval & Delivery of Records**.
9. If you have any comments regarding the pickup (Use freight elevator, loading dock closed between noon and 1pm, etc.) enter into the Comments field.
11. Click on the Send button.

Request Files from HCDE

Files can only be requested from boxes currently stored at HCDE. Files must be requested from Search Results.

1. Select **All** from the search menu and **Customer File #** if you have the file name & file has previously been retrieved.

Harris County Department of Education

All Customers

Dashboard Items On Order (0)

Home Search Add Pick Up Request Service / Material Reports Admin Help

Customer File # Davis, Curtis 8855 Search

All
Barcode
Parent Item Code
Customer Box #
Customer File #
Parent Reference
Index Item Id
Years In Box
Box Index

Document Scanning, Conversion, and Digitization Services

Order online it will provide you with a WORK ORDER NUMBER which confirms that the order was accepted. Please make a note of it because it will appear on your attachment.

Files are required to index the information into the City's Records Management System prior to archiving with HCDE, per COH Policy & Procedures.

2. Enter file name & select Search.

3. Once the boxes are in the results grid, click on the Request From OffSite icon to request a file.

Showing 1 - 1 of 1

Sort by Barcode

selected

Barcode: F0000075486 **Parent Item Code:** 000106392
FBU: MAIN **Customer:** HCDE:Harris County Dept of Ed
Department: RECORDS MGMT.RECORDS MANAGEMENT
Customer File #: Davis, Curtis 8855

Or Enter barcode to search by barcode. Click on to request existing files on box.

Home Search Add Pick Up Request Service / Material Reports Admin Help

Barcode 000106392 Search

Showing 1 - 1 of 1

Sort by Barcode

selected

Barcode: 000106392 **Child Item(s):** (3) **FBU:** MAIN
Customer: HCDE:Harris County Dept of Ed
Department: RECORDS MGMT.RECORDS MANAGEMENT
Years In Box: 2002-03 **Box Index:** ALDINE -HUFFMAN
Description: INVOICES

Select	Barcode	Parent Item Code	FBU	Customer	Department	Customer File #
Request	F0000075486	000106392	MAIN	HCDE:Harris County Dept of E	RECORDS MGMT.RECORDS	Davis, Curtis 8855
Request	F0000075503	000106392	MAIN	HCDE:Harris County Dept of E	RECORDS MGMT.RECORDS	Jackson, Brown 7144
Request	F0000075513	000106392	MAIN	HCDE:Harris County Dept of E	RECORDS MGMT.RECORDS	Little, Mann

3. Once the files are in the results grid, click on [Request](#) to request a file.

If file has never been retrieved search box by barcode or

Harris County Department of Education

MAIN.HCDE:Harris County De

Dashboard

Home Search Add Pick Up Request Service / Material Reports Admin Help

All 000106392

All
Barcode
Parent Item Code
Customer Box #
Customer File #
Parent Reference
Index Item Id
Years In Box

Showing 1 - 1 of 1

Sort by Barcode

Request From OffSite
Remove Item
selected
In

Barcode: 000106392 FBU: MAIN
Customer: HCDE:Harris County Dept of Ed
Department: RECORDS MGMT.RECORDS MANAGEMENT
Years In Box: 2002-03 Box Index: ALDINE -HUFFMAN
Description: INVOICES

3. A new **Add Item** box will appear with the box barcode in the **Parent Item Code** field.

Add Item

Parent Item Code: 000106392
 Retain data entered on add

Department: Records Management
 Type: FILE
 Requested For: ELDI

Customer File #
 Eldi Eldi

Index Item Id
 7142

Save Close

5. Enter file information in the reference fields and click on the **Save** button.
6. When done adding files, click on the **Close** button. The files will appear on the grid with the boxes. The barcode will show as "unknown", as it is not added until the files are scanned.

You can remove from the cart or edit, as needed.

7. Click on the **Send Order** button.
8. Select the **Delivery Address** from the drop down menu.

If you want to enter an alternate contact in case you're not available to accept delivery, enter the name in the **Alternate Contact** box.

9. Change the **Delivery Priority** to **Standard Delivery**.
10. Select the date you would like service from the **Delivery Date** drop down.
11. If you have any comments regarding delivery (Use freight elevator, loading dock closed between noon and 1pm, etc.) enter into the **Comments** field.
12. Click on the **Send** button.

Complete Send Order - HCDE Harris County Dept of Ed

Delivery Address

RECORDS NPO (dropdown) | 6005 WESTVIEW (text box)
Select Delivery Address | Address

RECORDS MANAGEMENT (dropdown) | HOUSTON (text box)
Address | City

TX (dropdown) | 77055 (text box)
State | Zip

Order Information

2019 records (text box) | Pick up Returning Boxes (dropdown)
Customer Order Reference | Select Delivery Priority

RECORDS MGMT.RECORDS MA (dropdown)
Charge to Department

Comments

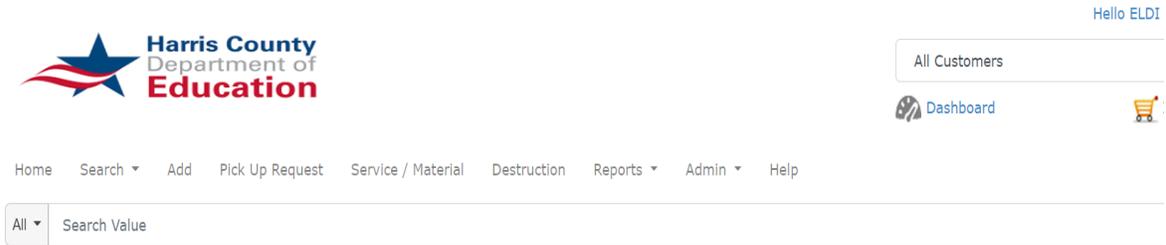
2nd floor Room 214 (text area)

Send | Cancel

Once submitted, a report with your Work Order number and order details will appear. You can print by selecting the Report button and pick your preferred type of report from the drop down. Depending on which browser you are using, you can either print directly or download and print.

Purchase Empty Cartons and/or Request Labels

1. Click on **Service / Materials** from the menu or the **Service / Materials** icon.



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[Click here to email us your attachment.](#)

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Note: Please enter Purchase Order Number in the comments filed.

2. Select Box - Box Purchase from the **Service / Materials** drop down menu.
3. Enter quantity you wish to purchase in the **Quantity** field. All boxes come in bundles of 25.
4. Click on the **Save** button.

Service / Material

Customer	Department	Requested For
MAIN.HCDE.Harris (v)	Select Department v	ELDI MEZA
Service / Material	Quantity	
BOX - Box Purchase 25 PER BUNDLE v	50	
	Comments	
	PO: 01231073	

- If you need to order labels, change the **Purchase Item** drop down to **Labels**.
Note: You can also add barcode labels in the comments are of your box purchase order.
- Enter the quantity in the **Quantity** field. (15 Barcode labels per sheet)

Service / Material

Customer MAIN.HCDE.Harris C ▾	Department Select Department ▾	Requested For ELDI
Service / Material BAR - BARCODE LABELS 15 PER SHI ▾	Quantity 45	Comments 3 Sheets

- Click on the **Save** button and then and the **Close** button.

If you need to make any changes, simply click on the pencil. If you need to remove anything, click on the Remove link.

- When your order is complete, click on the **Send Order** button.

Showing 1 - 1 of 1

Remove
 selected
 Service / Material for ELDI
MEZA

HCDE: Harris County Dept of Ed

Service / Material: BAR - BARCODE LABELS 15 PER SHEET **FBU:** MAIN
Customer: HCDE:Harris County Dept of Ed
Department: ADMIN.ADMIN OFFICE **Quantity:** 45
Comments: 3 Sheets

- Select the **Delivery Address** from the drop down menu.
- Change the Delivery Priority to Standard Delivery.
- If you have any comments regarding the pickup (Use freight elevator, loading dock closed between noon and 1pm, etc.) enter into the Comments field.

12. Click on the Send button.

Complete Send Order - HCDE Harris County Dept of Ed

Delivery Address

RECORDS NPO	6005 WESTVIEW
Select Delivery Address	Address
RECORDS MANAGEMENT	HOUSTON
Address	City
TX	77055
State	Zip

Order Information

50 boxes 2 bundles	Purchase of Boxes (25 per bun
Customer Order Reference	Select Delivery Priority
ADMIN.ADMIN OFFICE	
Charge to Department	
<input type="text"/>	<input type="button" value="Browse"/>
Pick a file to upload	

Comments

Once submitted, a report with your Work Order number and order details will appear. You can print by selecting the Report button and pick your preferred type of report from the drop down. Depending on which browser you are using, you can either print directly or download and print.