SECURE RECORDS SOLUTIONS

## INSTRUCTIONS FOR GENERATING INVENTORY REPORTS
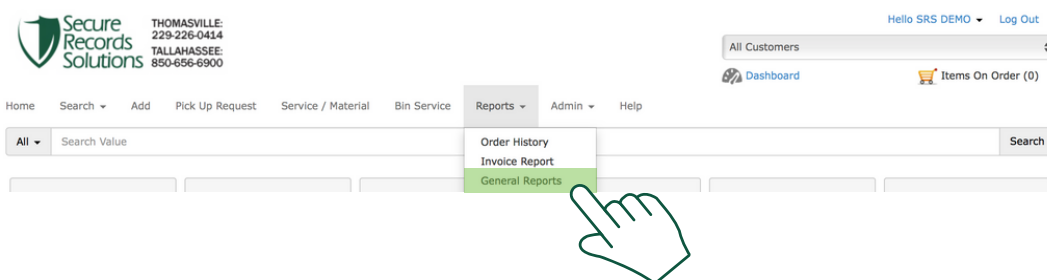
STEPS TO GENERATE REPORTS

1. Visit www.securerecordssolutions.com and click on "CLIENTS" in top menu or visit www.securerecordssolutions.com/clients to access the clients page directly.

2. From the Client Page (www.securerecordssolutions.com/clients), click on the "VISIT PORTAL" button on the lefthand side of the page. Login using your username and password. Email clientcare@securerecordssolutions.com if you need password assistance.
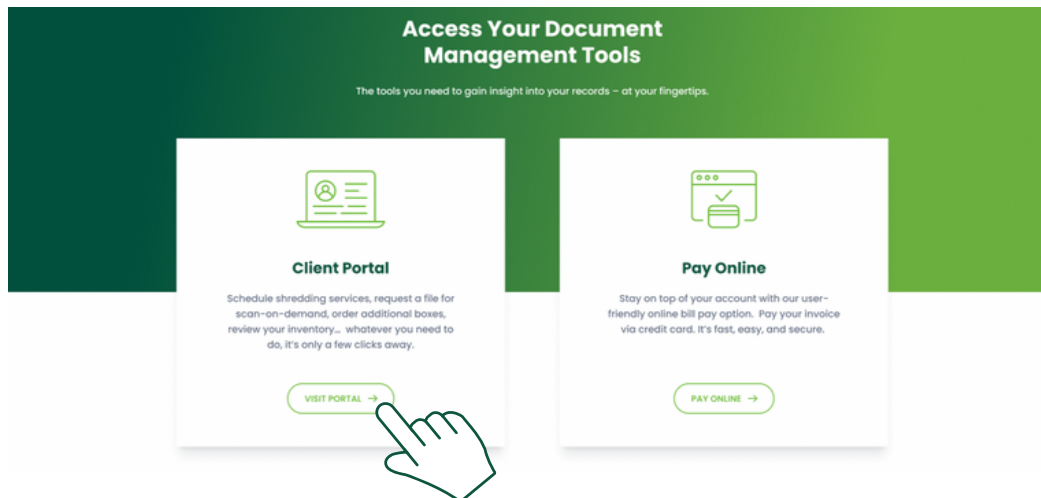
3. Go to "Reports", then "General Reports".

STEPS TO GENERATE REPORTS

4. On the left, you will see a list of reports. Choose the report you wish to view, then select the client name and departments. As an example, you can select the report "Items Scheduled for Destruction Review" to see and approve inventory for destruction.

General Reports

Description
Box Inventory Report
Box Inventory Report 2
Box Inventory Report With Storage Code
Inventory Report by Department and Item Type
Inventory Report by Department and Item Type 2
Inventory by Department / Item Type / Status
Inventory by Department / Item Type / Status / References 2-7
Item Activity Report
Items Assigned to an Item Hold
Items Scheduled for Destruction Review
Scheduled Service Dates for Scheduled Work Orders
Web Vault Due Back Report

5. Once you choose the desired report, select the client name on the right. Then click "Next".

Report Parameters

Select Customers or leave at default for all

	Customer
☑	PO1 Client Name

☑ Select All in List

Next

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STEPS TO GENERATE REPORTS

6. A list of departments will appear. You can "Select All" or just the department you wish to view as long as you are authorized for that department. Once you've made your selections, click "Next".

Report Parameters

Select Departments or leave at default for all (Single customer only)

	Department
☑	No Department
☑	ACCOUNTING
☑	DEMO HOME OFFICE
☑	HR
☑	MASCO PC01234
☑	Medical Records
☑	OPERATIONS

☑ Select All in List

Back   Next

7. After selecting departments, you will be given a list of record types - containers, files and media. Make your sections, then click "Next".

Report Parameters

Select Item Types or leave at default for all

	Description
☑	CONTAINER
☑	FILE
☑	MEDIA

☑ Select All in List

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STEPS TO GENERATE REPORTS

8. Enter your desired ending date or run the report with the default dates. Select the file type for your report - for example, PDF. A new screen will pop up with the list or a download option.

Report Parameters

Enter beginning expire date or leave at default to disregard
01/01/1900

Enter ending expire date or leave at default to disregard
12/31/9999

Sort By Department (Y/N)
Yes

Enter number to Order Report By: 1-Item Code, 2-Reference 1, 3-Reference 10, 4-Expire Date
1

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9. Once you've reviewed your records for destruction, you can sign the sheet, approving destruction, and email it to clientcare@securerecordssolutions.com.

10. If you would like to view your entire inventory, simply go back to the Home page. Type 0 in the search bar. Then select "Search".

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

All ▾   Search Value   Search

11. Once you've clicked "Search", there is an Excel button in the right hand corner. You can select this to generate an Excel sheet of your entire inventory to review.

If you need further assistance feel free to contact our team.

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