



Kent Record Management Inc.

Web Access Instructional Guide

www.kentrecords.com

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Grand Rapids, MI 49544

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Lansing, MI 48906

3003 S. Burdick
Kalamazoo, MI 49007

1994 Plaza Dr.
Benton Harbor, MI 49022

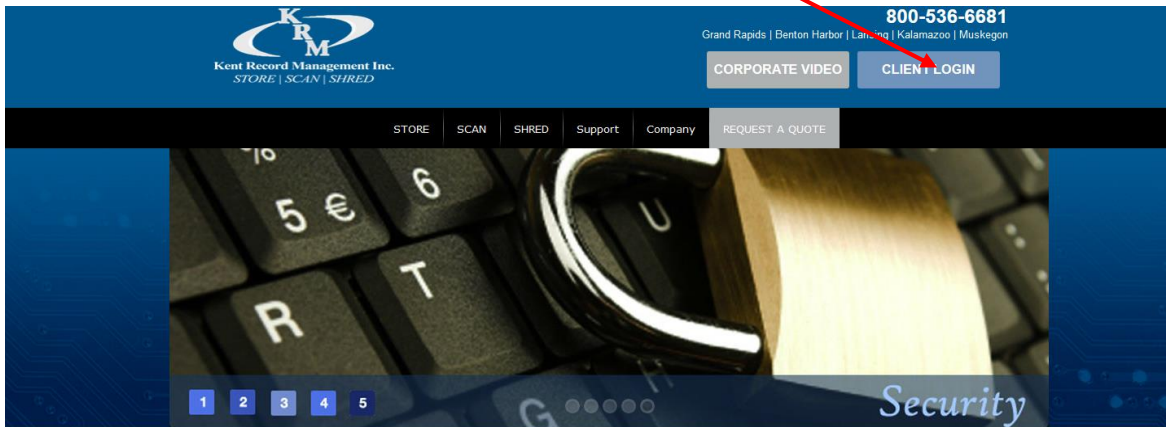
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Muskegon, MI 49444

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Go www.kentrecords.com and enter web access via the client portal and choose location

Login in using your username and password



Click below to log into the client portal:



Adding New Boxes to Storage

Under the Add tab → Item

Box is automatically prefilled in the Item Type drop down.

Choose a department if applicable

The data entry fields will appear below in red, ready for entry

Kent Record Management Inc.
STORE|SCAN|SHRED
Current Customer SAMPLE CUSTOMER Current User GREG GEORGE

Search User Add Reports Help Log Out

Add new item(s)

Item Type Department *Department Required Requested For
BOX 01A - OPERATIONS Add Boxes

Command Bar
View Order

Retain data entered on add

Action	Item Code	Description (NOT FILES)	Expire Date	From Date	To Date
Add (Ctrl+A)					

KRM box number – 8 digits including 0s

When the box is ready for destruction*

Description of contents in box

Starting date of contents to end date of contents in box**

*Destruction Date does not mean your boxes will be destroyed – this is a suggested field to enter. A report will be run and sent to the administrator on the account for destruction approval. KRM does not destroy boxes or files without authorized signatures and approvals.

**This is optional and not required.

***Customized tabs can be added and removed depending on what your internal needs are. Please contact customer service to edit these.

Once all information is entered click **Add** or **Ctrl + A** to add box

Box will move down and now show in black versus red – field outlined in red means information has not been saved or retained

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Search User Add Reports Help Log Out

Add new item(s)

Item Type Department *Department Required Requested For
BOX 01A - OPERATIONS Add Boxes

Command Bar
View Order

Retain data entered on add

Action	Item Code	Description (NOT FILES)	Expire Date	From Date	To Date
Add (Ctrl+A)					
Remove Edit	00786627	MISCELLANEOUS OPI	07/08/2021	07/21/2015	07/07/2015

Continuing adding boxes until order is complete

KRM will retain all information until order is sent – you may log out and log back in at a later time. All boxes previously entered will be saved

Sending order to KRM for new box pick up

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Current Customer SAMPLE CUSTOMER Current User GREG GEORGE

Search User Add Reports Help Log Out

Add new item(s)

Item Type Department *Department Required Requested For
BOX 01A - OPERATIONS Add Boxes

Command Bar
View Order

Retain data entered on add

Action	Item Code	Description (NOT FILES)	Expire Date	From Date	To Date
Add (Ctrl+A)					
Remove Edit	00786629	TRAVEL REPORTS	07/16/2020	12/12/2006	07/04/2007
Remove Edit	00786628	LOGS	07/12/2018	05/10/2015	07/01/2015
Remove Edit	00786627	MISCELLANEOUS OPI	07/08/2021	07/21/2015	07/07/2015

Click View Order*

*View Order can also be accessed through the User Tab → View Order

KRM
Kest Record Management Inc.
STORE:SCANISHRED
Current Customer SAMPLE CUSTOMER Current User GREG GEORGE

Search User Add Reports Help Log Out

Command Bar
Send Order Remove All Refresh

Item Requests

Item Type = BOX											
Edit	Remove	Action	Item Code	Parent Item Code	Parent Reference	Description (NOT FILES)	Department	Expire Date	From Date	To Date	Comments
Edit	Remove Add BOX		00786627			MISCELLANEOUS OPI	01A	07/08/2021	07/21/2015	07/07/2015	Edit
Edit	Remove Add BOX		00786628			LOGS	01A	07/12/2018	05/10/2015	07/01/2015	Edit
Edit	Remove Add BOX		00786629			TRAVEL REPORTS	01A	07/16/2020	12/12/2006	07/04/2007	Edit

The View Order screen allows you to view boxes ready to be sent to KRM. You still have the opportunity to edit or remove items from your order.

Adding New Boxes to Storage – Adding Files to New Boxes

Applicable if your company uses file level inventory for boxes
(if this does not apply skip to page 7)

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Current Customer SAMPLE CUSTOMER Current User GREG GEORGE

Search User Add Reports Help Log Out

Command Bar
Send Order Remove All Refresh

Item Requests

Item Type = BOX											
Edit	Remove	Action	Item Code	Parent Item Code	Parent Reference	Description (NOT FILES)	Department	Expire Date	From Date	To Date	Comments
Edit	Remove Add BOX		00786627			MISCELLANEOUS OPI	01A	07/08/2021	07/21/2015	07/07/2015	Edit
Edit	Remove Add BOX		00786628			LOGS	01A	07/12/2018	05/10/2015	07/01/2015	Edit
Edit	Remove Add BOX		00786629			TRAVEL REPORTS	01A	07/16/2020	12/12/2006	07/04/2007	Edit

To add files to a box, click on the document icon next to the box number

A new window will appear allowing you to add files to that specific box



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Current Customer SAMPLE CUSTOMER Current User GREG GEORGE

Items Matched: (9) Items On Order: (6)

➤ Add new item(s) to thisBOX (00786629)

Item Type	Department *Department Required	Requested For
FILE	01A - OPERATIONS	GREG GEORGE

➤ Command Bar

Close

Retain data entered on add

Action	DATE OF BIRTH	DOCTOR	NAME
Add (Ctrl+A)		Dr. Levine	
Remove Edit	01/01/2015	Dr. Davis	BAKER, JOHN
Remove Edit	01/12/1990	Dr. Levine	SMITH, JOHN
Remove Edit	11/15/1985	Dr. Levine	GEORGE, GREG

Item type has changed to FILE versus box

Enter data for each file and click Add (Ctrl+A) after each entry

If data entered for a file is incorrect you may choose to remove the file or edit it

When you've completed adding files for the specific box you may close out of window all entries are automatically added to the pending order

To add files to another box – follow the same steps listed above

***Customized tabs can be added and removed depending on what your internal needs are. Please contact customer service to edit these.

Sending New Boxes Order to KRM

Hover over User tab → click View Order

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Current Customer SAMPLE CUSTOMER Current User GREG GEORGE

Command Bar

Send Order Remove All Refresh

Item Requests

Item Type = BOX											
Edit	Remove	Action	Item Code	Parent Item Code	Parent Reference	Description (NOT FILES)	Department	Expire Date	From Date	To Date	Comments
Edit	Remove	Add	00786627			MISCELLANEOUS OPI	01A	07/08/2021	07/21/2015	07/07/2015	Edit
Edit	Remove	Add	00786628			LOGS	01A	07/12/2018	05/10/2015	07/01/2015	Edit
Edit	Remove	Add	00786629			TRAVEL REPORTS	01A	07/16/2020	12/12/2006	07/04/2007	Edit

Item Type = FILE											
Edit	Remove	Action	Item Code	Parent Item Code	Parent Reference	DATE OF BIRTH	DOCTOR	NAME	Department	Effective Date	Comments
Edit	Remove	Add	00786629			11/15/1985	Dr. Levine	GEORGE, GREG	01A	07/01/2015	Edit
Edit	Remove	Add	00786629			01/12/1990	Dr. Levine	SMITH, JOHN	01A	07/01/2015	Edit
Edit	Remove	Add	00786629			01/01/2015	Dr. Davis	BAKER, JOHN	01A	07/01/2015	Edit

If your order is ready complete and ready for KRM pick up – click Send Order

Boxes and files you've entered

This is where you will see all the data you've added including boxes and files. You may still remove boxes/files or edit the information before sending the order

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Current Customer SAMPLE CUSTOMER Current User GREG GEORGE

Command Bar

Complete Send Order Clear Comments

Delivery options

Customer Order Reference

Select Delivery Priority

Charge to Department 01A - OPERATIONS

Select Delivery Address GR Grand Rapids Office

Address 1234 Main St

Address Suite 401

City Grand Rapids

State MI

Zip 49306

Comments

Working from the bottom up select a Delivery Address, Charge to Department (if applicable), and choose Box Pickup in the Select Delivery Priority (Customer Order Reference is not required)



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Current Customer SAMPLE CUSTOMER Current User GREG GEORGE

[Search](#) [User](#) [Add](#) [Reports](#) [Help](#) [Log Out](#)

Command Bar

[Complete Send Order](#) [Clear Comments](#)

Delivery options

Customer Order Reference

Select Delivery Priority

Charge to Department

Select Delivery Address

Address

Address

City

State

Zip

Comments

Add any comments in the comments section such as phone number – just in case the courier needs to call you, room number, times when no one will be in the office, anything that would be helpful to the courier.



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Current Customer SAMPLE CUSTOMER Current User GREG GEORGE

[Search](#) [User](#) [Add](#) [Reports](#) [Help](#) [Log Out](#)

Command Bar

[Complete Send Order](#) [Clear Comments](#)

Delivery options

Customer Order Reference

Select Delivery Priority

Charge to Department

Select Delivery Address

Address

Address

City

State

Zip

Comments

After all information is filled out hit Complete Send Order – this is a live button and will hit KRM's system immediatly



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[Search](#) [User](#) [Add](#) [Reports](#) [Help](#) [Log Out](#)

Current Customer SAMPLE CUSTOMER Current User GREG GEORGE

Command Bar

[Detail report in HTML](#) [Detail report in PDF](#) [Text Export](#) [Excel Export](#)

Work order summary

Order for Customer: SAMPLE CUSTOMER and web user: GREG GEORGE
has been submitted under work order # 0504293,

Order Date	07/01/2015 09:56:56 AM
Your Ref	
Deliver To	1234 Main St. Suite 401 Grand Rapids, MI 49306
Attention	GREG GEORGE
Required By	07/06/2015 04:00:00 PM - BXP
Dept/Cost Center	01A

You will receive this confirmation page with options to print or export the work order lines submitted.

Searching and Retrieving Boxes or Files

Hovering over Search → click Quick Search



Current Customer SAMPLE CUSTOMER Current User GREG GEORGE

Quick Search Criteria

Item Type	Department	Order By	Requested For	Page Size
BOX		Item Code	GREG GEORGE	20

Search Fields (BOX)

Item Code	Description (NOT FILES)	Expire Date	From Date	To Date

Command Bar

Clear Input Search New Search Import from file Clear Results Select All View Order

Select BOX in Item Type if searching for a box or FILE in Item Type if searching for a specific file out of a box



Current Customer SAMPLE CUSTOMER Current User GREG GEORGE

Quick Search Criteria

Item Type	Department	Order By	Requested For	Page Size
BOX		Item Code	GREG GEORGE	20

Search Fields (BOX)

Item Code	Description (NOT FILES)	Expire Date	From Date	To Date

Command Bar

Clear Input Search New Search Import from file Clear Results Select All View Order

Searching for a BOX: Enter data in the Search Fields – Item Code (box number) when searching for a box is always the most accurate – less is more in this field

If the Item Code (box number) is not known you may search by Description, Expire Date, From Date, To Date*

*To do a wildcard search where you'd want to see an item that contains a word, enter % before the word. Example: %time (under Description field)



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Current Customer SAMPLE CUSTOMER Current User GREG GEORGE

Quick Search Criteria

Item Type: FILE Department: Order By: Item Code Requested For: GREG GEORGE Page Size: 20

Search Fields (FILE)

Item Code Parent Item Code Parent Reference DATE OF BIRTH DOCTOR NAME Effective Date

Command Bar

[Clear Input](#) [Search](#) [New Search](#) [Import from file](#) [Clear Results](#) [Select All](#) [View Order](#)

Searching for a FILE: When searching for a file Parent Item Code (box number) is always the most accurate if you know what box the file is in

If you do not you know the Item Code (box number) you may search any fields that apply to your company – date of birth, description, name, or effective date



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[Search](#) [User](#) [Add](#) [Reports](#) [Help](#) [Log Out](#)

Current Customer SAMPLE CUSTOMER Current User GREG GEORGE

Quick Search Criteria

Item Type: FILE Department: Order By: Item Code Requested For: GREG GEORGE Page Size: 20

Search Fields (FILE)

Item Code Parent Item Code Parent Reference DATE OF BIRTH DOCTOR NAME Effective Date

NAME: GEORGE, GREG

Command Bar

[Clear Input](#) [Search](#) [New Search](#) [Import from file](#) [Clear Results](#) [Select All](#) [View Order](#)

Less is more – it is recommended that only one field be searched for to pull up as many results for that description as possible.

Searching for GEORGE, GREG file – type name in and hit New Search*

*Hitting New Search versus Search: New Search clears all other searches made – Search builds to the search and lists all the searches made

**To retrieve not-indexed files please call customer service for instructions.

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Current Customer SAMPLE CUSTOMER Current User GREG GEORGE

Quick Search Criteria

Item Type: FILE Department: Order By: Requested For: GREG GEORGE Page Size: 20

Search Fields (FILE)

Item Code: Parent Item Code: Parent Reference: DATE OF BIRTH: DOCTOR: NAME: GEORGE.GREG Effective Date:

Command Bar

Clear Input Search New Search Import from file Clear Results Select All View Order

Results

Display Long Description Excel Export - All / Page Text Export - All / Page Requested Action Delivery Remove

Edit	Select	Detail	Item Code	Parent Item Code	Parent Reference	Item Type = FILE	DATE OF BIRTH	DOCTOR	NAME	Department	Effective Date
Edit	<input type="checkbox"/> Retrieve		F0001857617	800195	Reference 1:	filecreated on work ord		Dr. Levine	GEORGE.GREG	01A	03/01/2007

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Current Customer SAMPLE CUSTOMER Current User GREG GEORGE

Quick Search Criteria

Item Type: BOX Department: Order By: Requested For: GREG GEORGE Page Size: 20

Search Fields (BOX)

Item Code: Description (NOT FILES): 800195

Command Bar

Clear Input Search New Search Import from file Clear Results Select All View Order

Results

Display Long Description Excel Export - All / Page Text Export - All / Page Requested Action Delivery Remove

Edit	Select	Detail	Item Code	Description (NOT FILES)	Department	Item Type = BOX	Expire Date	From Date	To Date
Edit	<input type="checkbox"/> Retrieve		800195	TRAVEL REPORTS	01A		12/30/1899		

When finding box or files you'd like sent to you – click retrieve

You may order as many boxes or files – or a combination of both – as you'd like

It is recommended ordering as much as possible to avoid unnecessary transportation/handling charges

Command Bar

Clear Input Search New Search Import from file Clear Results Select All View Order

Results

Display Long Description Excel Export - All / Page Text Export - All / Page Requested Action Delivery Remove

Edit	Select	Detail	Item Code	Description (NOT FILES)	Department	Item Type = BOX	Expire Date	From Date	To Date
Edit	Pending Send Order for GREG GEORGE		800195	TRAVEL REPORTS	01A		12/30/1899		

Retrieve button will change to Pending Send Order

Sending Order: Hover over User tab → click View Order

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Current Customer: SAMPLE CUSTOMER Current User: GREG GEORGE

Command Bar

Send Order Remove All Refresh

Item Requests

Item Type = BOX											
Edit	Remove	Action	Item Code	Parent Item Code	Parent Reference	Description (NOT FILES)	Department	Expire Date	From Date	To Date	Comment
Edit	Remove Request	Request	800195			TRAVEL REPORTS	01A	12/30/1899			Edit

Click Send Order

Kent Record Management Inc.
STORESCAN/SHRED
Current Customer: SAMPLE CUSTOMER Current User: GREG GEORGE

Command Bar

Complete Send Order Clear Comments

Delivery options

Customer Order Reference:

Select Delivery Priority: Next Day Delivery/Pickup-web users

Charge to Department: 01A - OPERATIONS

Select Delivery Address: KRM Lansing Kent Records - Lansing R

Address: 840 Oakland

Address:

City: Lansing

State: MI

Zip:

Comments:

Working from the bottom up select the Delivery Address,
Charge to Department and Delivery Priority

Click Complete Send Order



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[Search](#) [User](#) [Add](#) [Reports](#) [Help](#) [Log Out](#)

Current Customer SAMPLE CUSTOMER Current User GREG GEORGE

[Command Bar](#)

[Detail report in HTML](#) [Detail report in PDF](#) [Text Export](#) [Excel Export](#)

[Work order summary](#)

Order for Customer: SAMPLE CUSTOMER and web user: GREG GEORGE has been submitted under work order # 0504373,

Order Date	07/01/2015 03:32:15 PM
Your Ref	
Deliver To	840 Oakland Lansing, MI
Attention	GREG GEORGE
Required By	07/03/2015 05:00:00 PM - NEXW
Dept/Cost Center	01A

You will receive this confirmation page with options to print or export the work order lines submitted.

Grand Rapids

- STAT (rush) requests, please call (616) 459-6681 rather than using web access
- After hours requests please page (616) 444-0837 and enter the phone number where you can be reached

Lansing

- STAT (rush) requests, please call (517) 484-1555 rather than using web access
- After hours requests please page (517) 341-9438 and enter the phone number where you can be reached

Kalamazoo

- STAT (rush) requests, please call (269) 341-9770 rather than using web access
- After hours requests please page (616) 444-0837 and enter the phone number where you can be reached

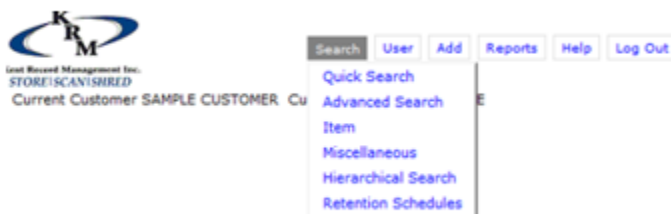
Muskegon

- STAT (rush) requests, please call (231) 798-8756 rather than using web access
- After hours requests please call (231) 798-8756

For technical support questions about web access please email customersupport@kentrecords.com or call (616) 459-6681

Explanation of Commonly Used Tabs

Search Tab



Quick Search: Quick Search allows to search for boxes or files

Advanced Search: Advanced Search allows you to search for a specific box or files. These boxes or files can be located by their assignment to a specific department, a specific storage type, their status (checked out or in at KRM), and ordered by a specific requestor within your company.

Item Search: This will rarely be used. Searches should be conducted through the Quick Search

Miscellaneous: This allows you to order box labels and empty boxes to be sent for sending boxes and files to KRM for storage

User Tab

View Order: The view order tab allows you view what orders you currently have holding waiting for processing to KRM

Add Tab



Add → Item: The add item feature allows you to add boxes to send to KRM for storage