Request Server Instructions
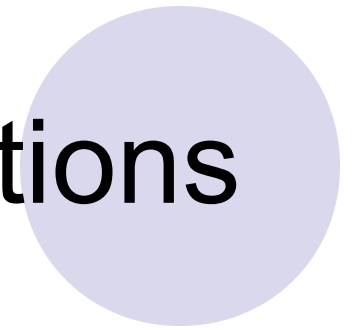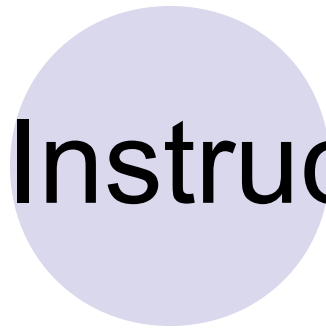
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Item 1: Get to the login screen

- Go to www.iotrak.com
- Click on "Client Login"
- Click on the "Request Server" button

Item 2: Logging In
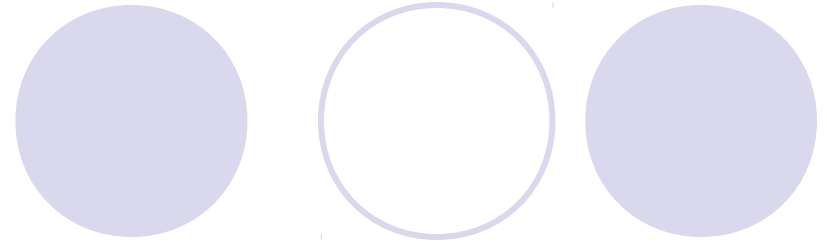
- Enter your unique User Name and Password (sent with these instructions)
- Submit

Item 3a: How to Change Your Password

Click on "Change Password"

Item 3b: Change Your Password

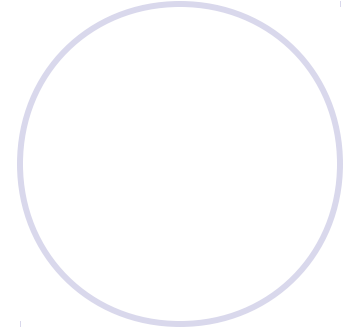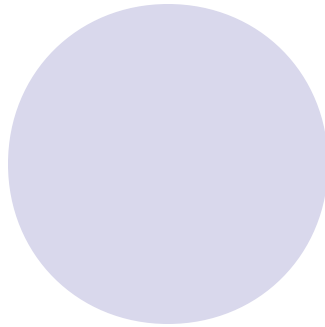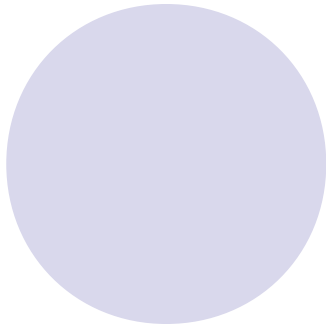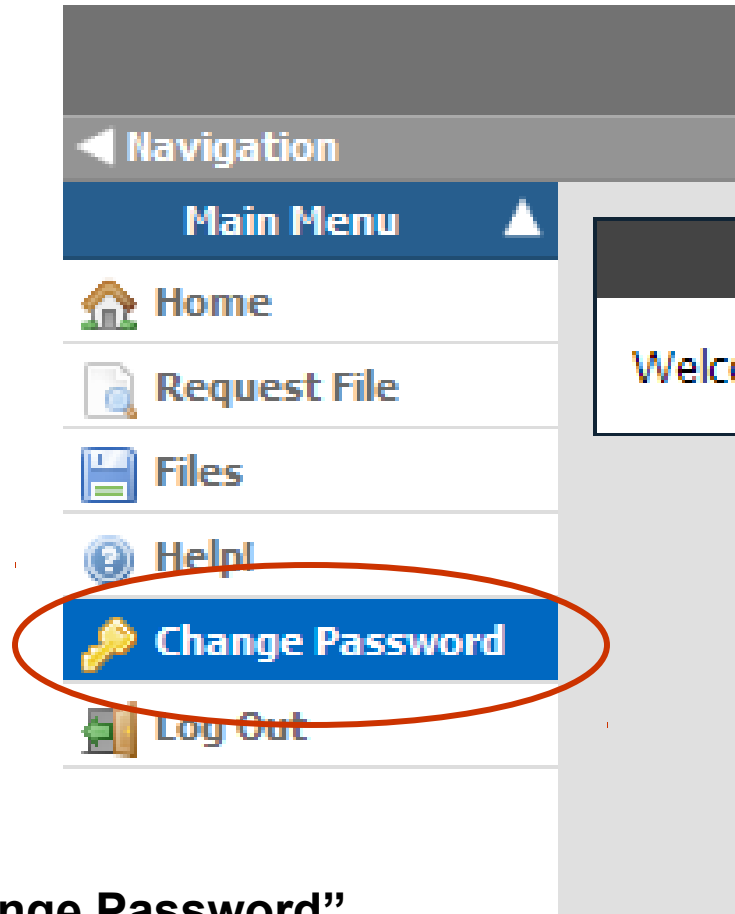
i/oTrak

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◄ Navigation

Main Menu ▲

🏠 Home

📄 Request File

💾 Files

❓ Help!

🔑 Change Password

📑 Log Out

Change Password

Here you can change the password for your login. We have some strict password requirements but they are in place to protect your company and your clients. We require that your password contains at least two of the following:

- Uppercase Characters
- Lowercase Characters
- Symbols (%,!,$, etc...)

Numeric characters are allowed, but they do not necessarily strengthen the password. We will not accept a password where half or more of the characters are numbers. We recommend choosing a short phrase or sentance that consists of at least three words and then either change the case of certain characters or change certain characters to symbols. **Example:** iloveapplepie$

Please do not write your password down or give it to anyone else. If someone else in your organization needs access to this application, please contact us to setup an account.
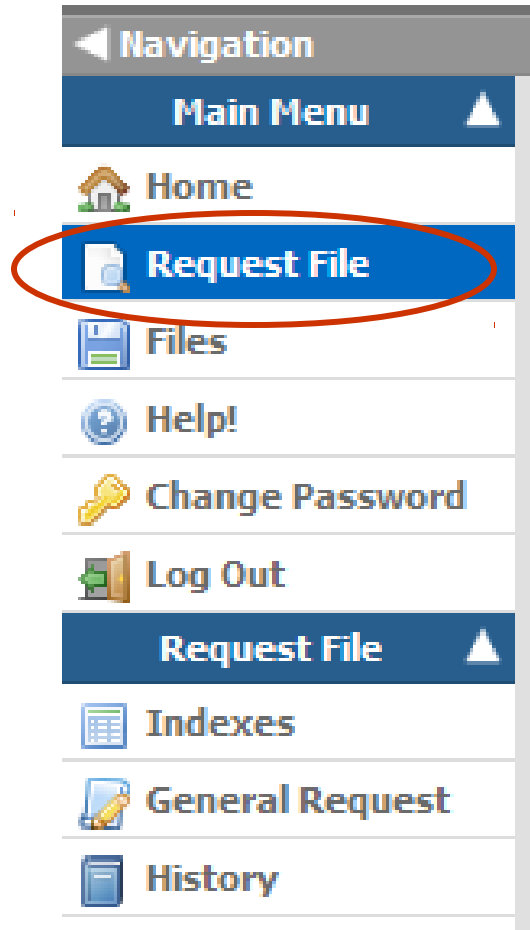
Current Password [   ]

New Password [   ]

Re-type New Password [   ]

Submit

Follow the on-screen instructions to set a new password for your account.

Item 4a: Requesting a File

Click on "Request File"

Item 4b: About Requesting a File

- Files are requested from either an indexed table or from a general request form.

- Depending upon your specific requirements, you may request a file using one or both of these methods.

- If your files have been indexed to table, then this would be the preferred method.

- Any file may be requested from the general request form since it does not require the file requested to have been previously indexed.

Item 4c: Requesting a File Using the Indexed Table
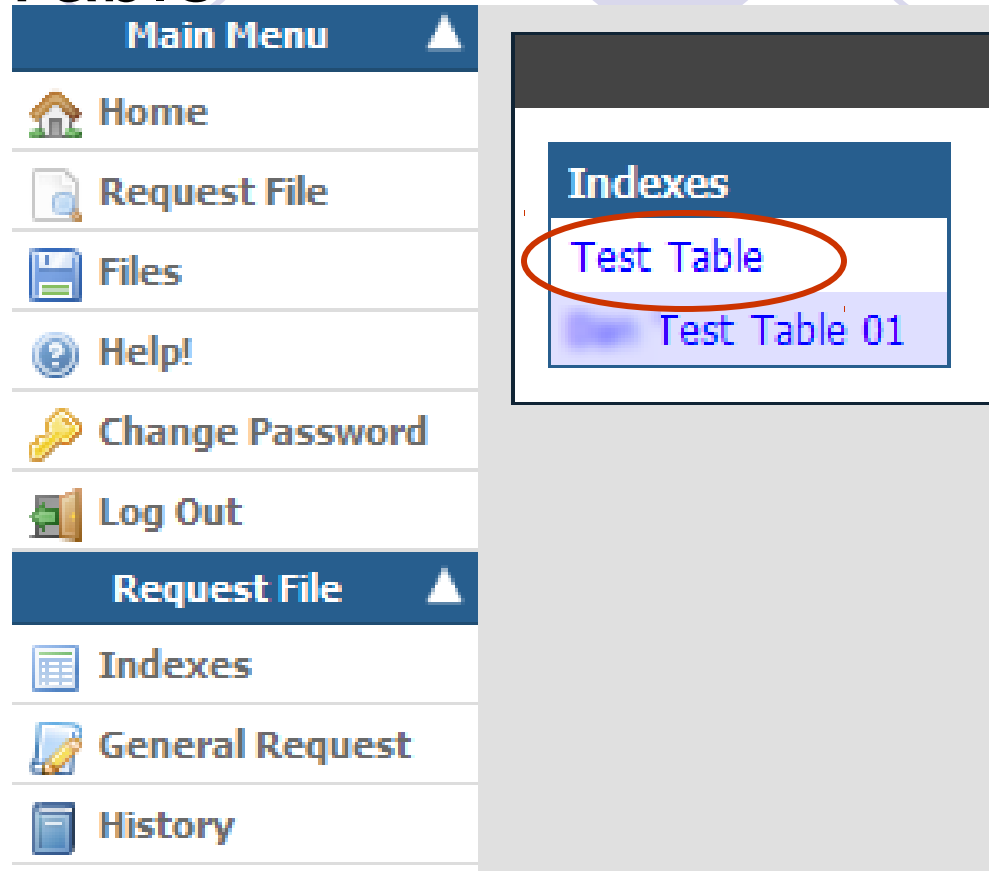
Select the Index Table that you would like to search.

Item 4d: Enter Your Search Terms

Query Dan Test Table 01	
Last Name rob	**First Name** mis
Date of Birth	
Sort: LastName ▾ ASC ▾	Query Reset

Enter your search terms and then click on "Query"

NOTE: The asterisk * character is no longer needed behind your search text.

Item 4e: Click the "Request Record" Button

Page: 1

Last Name	First Name	Date of Birth	
ROBOTO	MISTER	1945-01-08	

Item 4f: Submit Your Request

Fill out the details and click on "Request"

Note: This requests a specific record for an individual. If you want to request all other records for the same individual, select the check box.

Item 4g: View Request Status

To view the status of your request, click on "History"

Item 4h: Request Fulfilled

Requested	Fulfilled	Status
16:26	16:31	Fulfilled

Your request will show Status "Fulfilled" when it is complete.

Item 4i – Requesting a File using the General Request Form
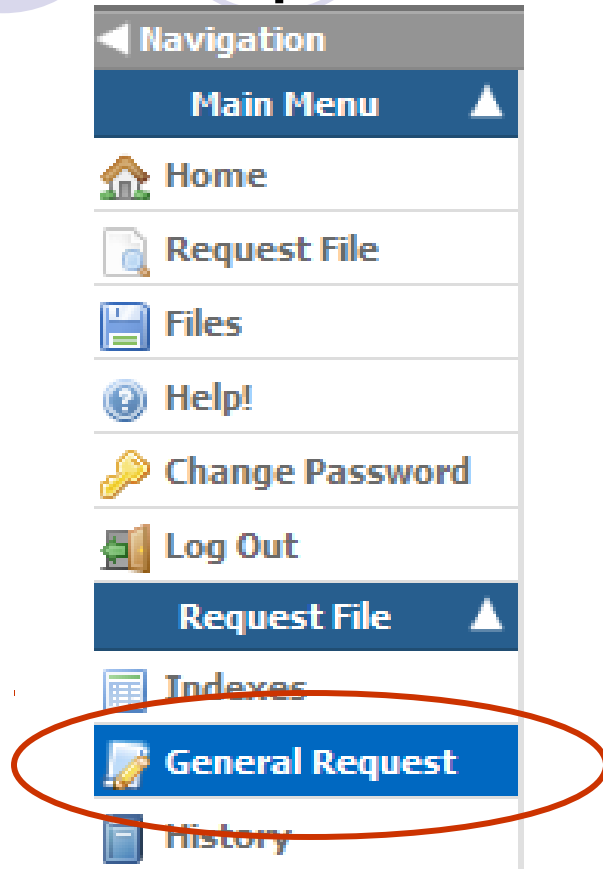
Click on the "General Request" menu item and submit the form.

Tip: If you do not see this button, click on "Request File" in the menu first.

Item 4j – Completing the General Request Form

General Request

This form will let you request a record that you cannot find in our index databases. Please only use this form if you have already searched the Indexes and cannot find the individual you seek. Requesting individuals that have already been indexed through this form could result in unnecessary delay.

Please provide some information about the record

Identifier [   ] This can be a person's full name, SSN, claim number, etc.
Document Type [   ]

When do you need this record?

Time Desired: Within 4 Hours ▾

Do you have any comments or special instructions?

[   ]

☐ I would like to request any additional documents in storage (such as Legacy Documents) that are associated with this record to be sent with this request.

[Request]

The general request form is used to submit a request for a document that does not have a specific index entry available to request. Please make your Identifier, Document Type, and Comments as detailed as possible to help us locate the requested record.

Item 4h – Request Server –History and Responses

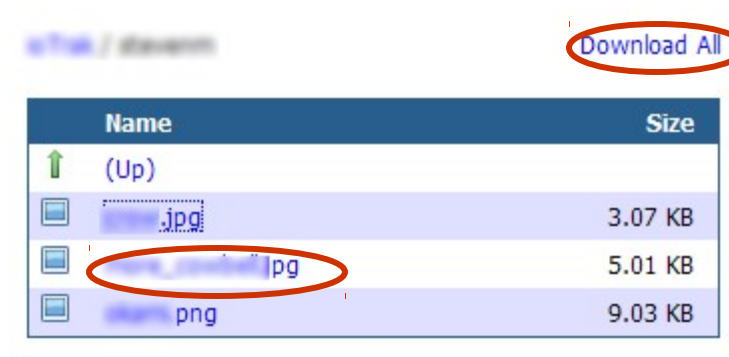**Request Responses are received using the History sub-menu under the "Request File" menu.**

Item 5a - How do I access my files?
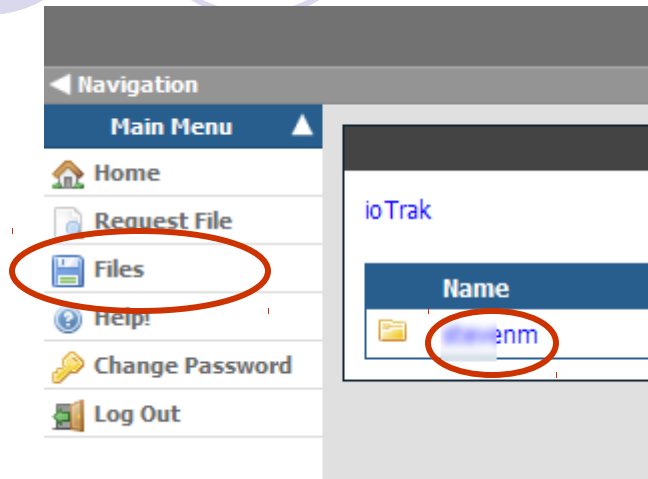
Click on "Files" in the Main Menu. You can browse the folders available by clicking on the folder names.

NOTE: If your files are hosted in a separate system or are not delivered electronically, you may not see this Menu item.

Item 5b – File Download Options

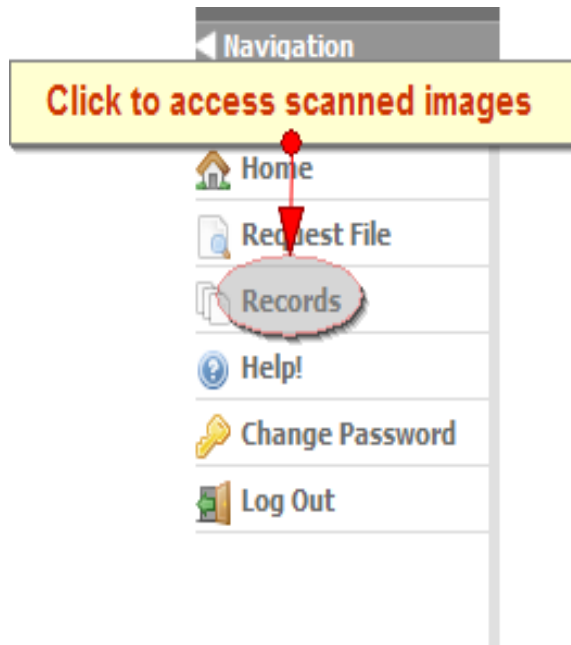**Clicking on a file name will allow you to open or download that individual file.**

To download all of the files in the current folder, select "Download All." This will download all of the files in that folder as a Zip archive file.

Item 6 - Supported Browsers

- Internet Explorer 7 or higher

- Mozilla Firefox 2 or higher

Item 7a – RECORDS system

Navigation

Click to access scanned images

- Home
- Request File
- Records
- Help!
- Change Password
- Log Out

- The Records system allows scanned records to be searched, viewed, and downloaded.
- If available, click on "Records" in the menu on the left to access this module.

Item 7b – Searching RECORDS

Thank you for the opportunity to be of service.

If you have any additional questions, please do not hesitate to call 800-739-6919 or 407-598-1500.