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Request Server Instructions

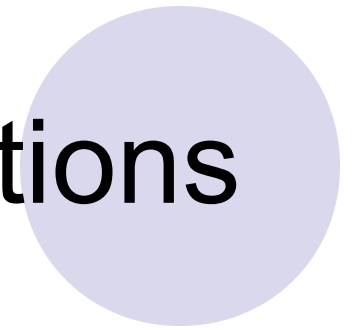
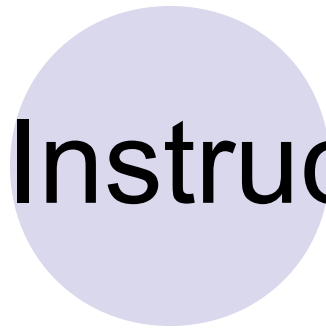
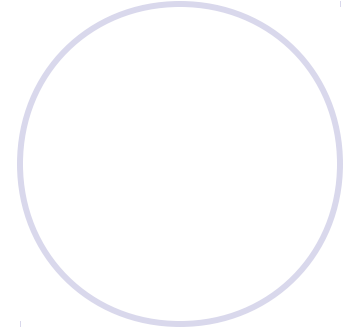
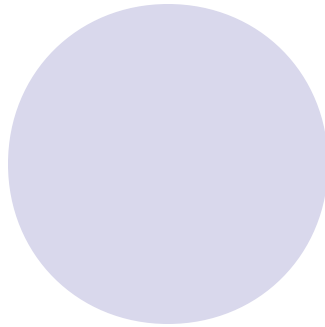
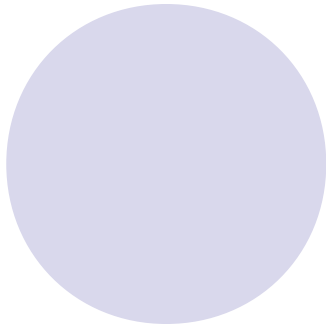


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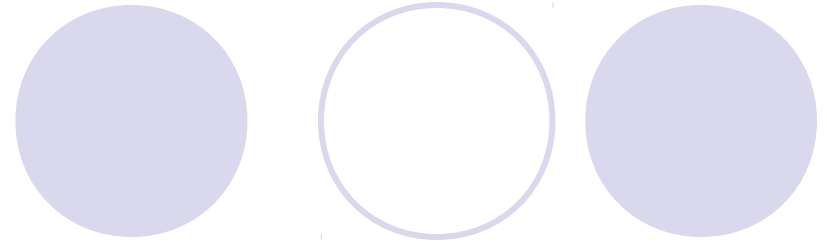
- Item 1 – Getting to login Screen
- Item 2 – Logging In
- Item 3 – How to Change Your Password
- Item 4 – Requesting a File
- Item 5 – Accessing Your Files
- Item 6 – Supported Browsers
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Item 1: Get to the login screen

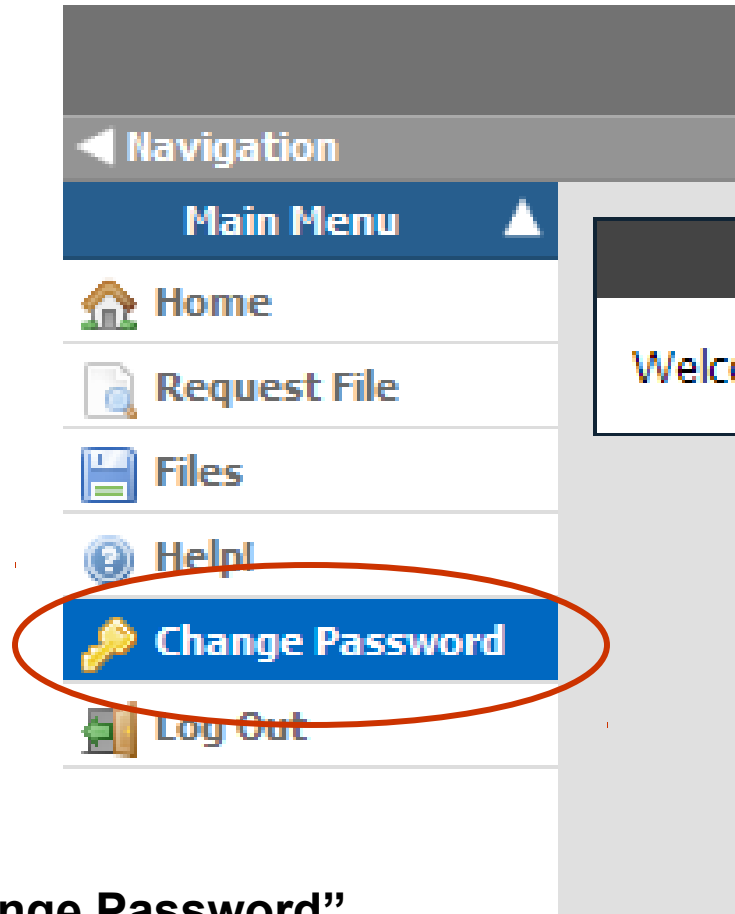
- Go to www.iotrak.com
- Click on “Client Login”
- Click on the “Request Server” button

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

- 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 sentence that consists of at least three words and then either change the case of certain characters or change certain characters to symbols. **Example:** iloveappleie\$

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.

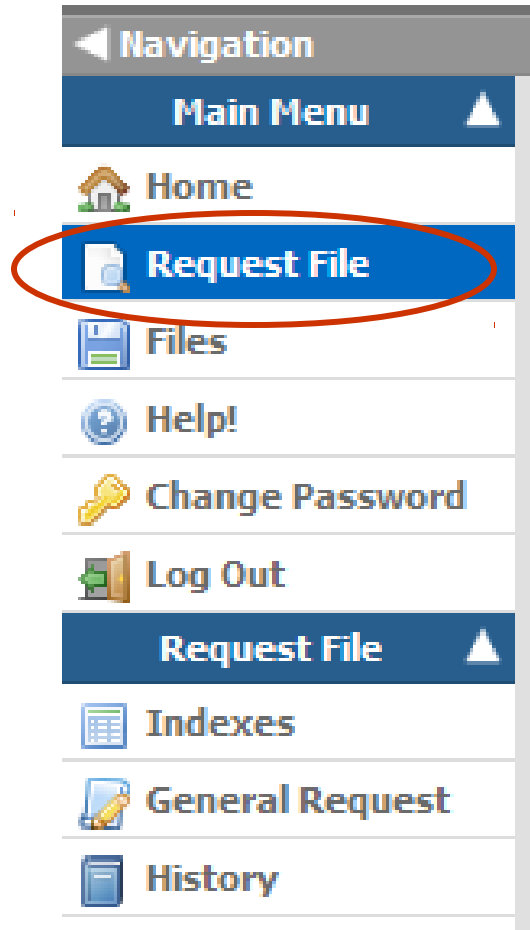
Current Password

New Password

Re-type New Password

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

Item 4a: Requesting a File

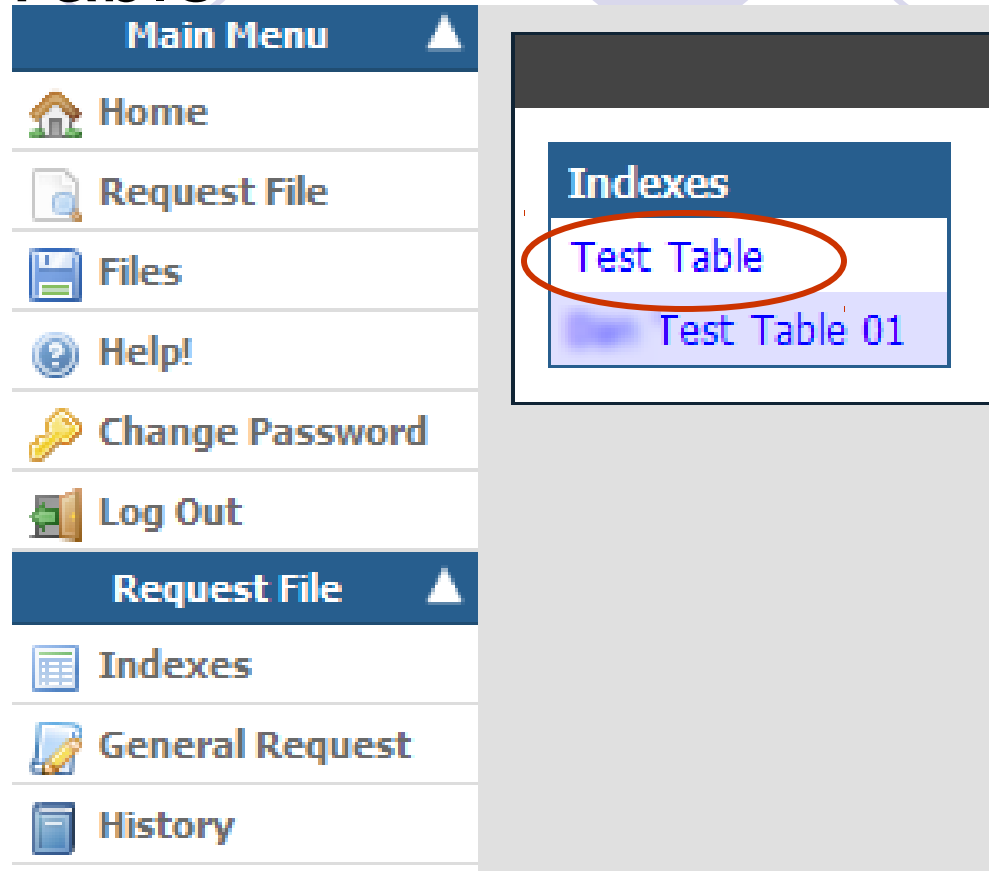


Click on “Request File”

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


The screenshot shows a search interface titled "Query Dan Test Table 01". It features two text input fields: "Last Name" containing "rob" and "First Name" containing "mis". Both fields are highlighted with a yellow background and a red circle. Below the "Last Name" field is a "Date of Birth" input field. Below the "First Name" field is a "Query" button, also circled in red, and a "Reset" button. At the bottom left, there is a "Sort:" section with two dropdown menus: "LastName" and "ASC".

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

Record

[Return to Query](#)

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

Request

When do you need this record?

Time Desired: ▼

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.

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

The screenshot displays a web application interface. On the left is a navigation menu with the following items: Main Menu, Home, Request File, Files, Help!, Change Password, Log Out, Request File, Indexes, General Request, and History. The 'History' item is circled in red. The main content area is titled 'Request History' and shows 'Page: 1'. Below this is a table with the following data:

Request	Table	Requested	Fulfilled	Status
Request #4	Test Table 01	16:26		Requested

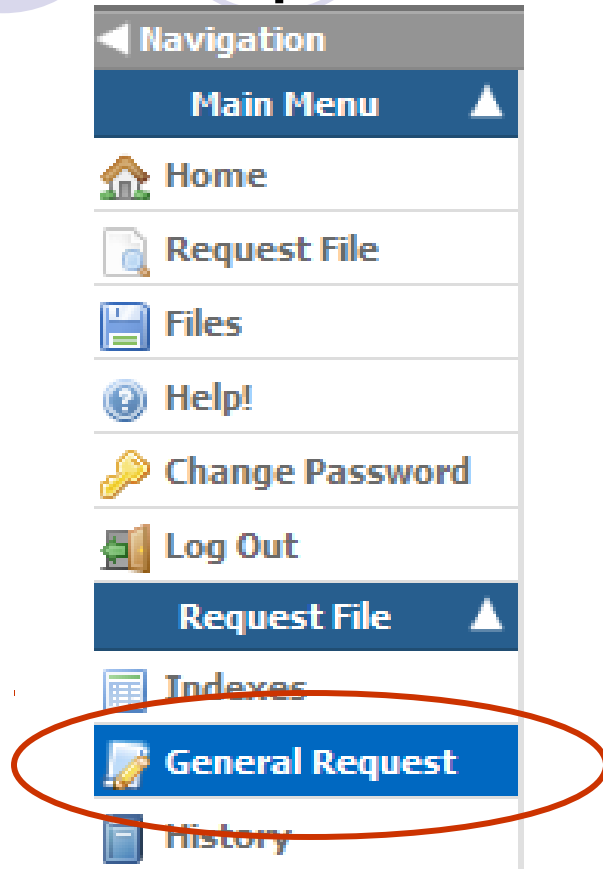
To view the status of your request, click on “History”

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:

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.

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.

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Navigation
Main Menu ▲
Home
Request File
Files
Records
Help!
Change Password
Log Out
Request File ▲
Indexes
General Request
History

Request History

Page: 1 2 Results: 38

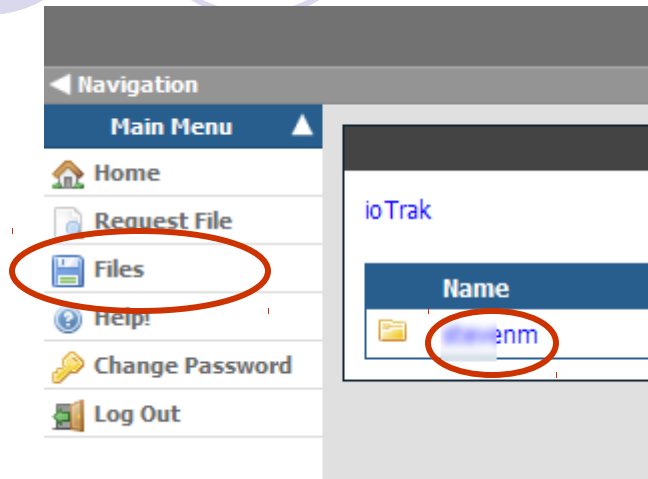
Request	Table	Fulfilled	Status	Comment
Request #1305	(Request Form)	14:43 14:44	Fulfilled	At this time we have not located any additional documents for this individual. Please advise if there is additional information available which may assist us in locating the documents requested (such as a maiden name or additional identifiers). If additional information is available, please submit another request and we will use the new information to perform another search. Thank you for the opportunity to be of service.
Request #1303	(Request Form)	14:10 14:11	Fulfilled	The requested file has been scanned and posted. Thank you for the opportunity to be of service.

Step 1: Click on "Request File"

Step 2: Click on "History"

Step 3: View response for fulfilled requests

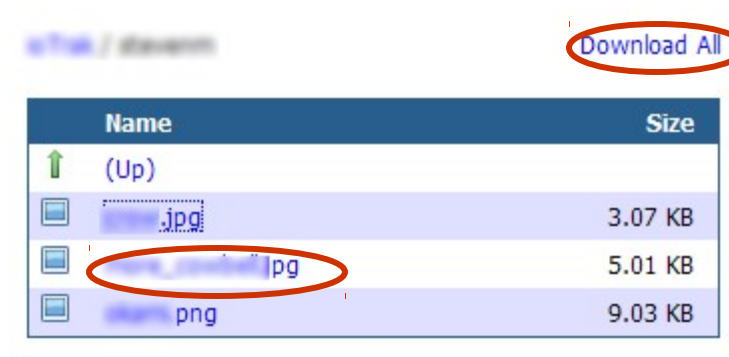
Item 5a - How do I access my files?



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.

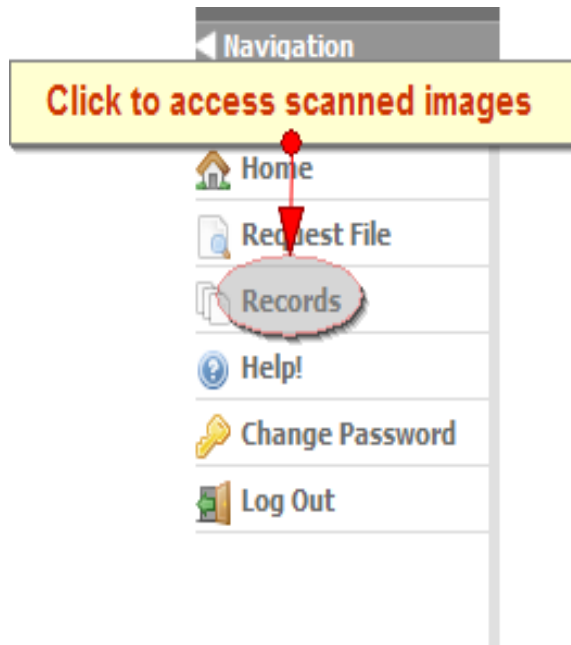
To download all of the files in the current folder, select “Download All.” This will download all of the files in that folder as a Zip archive file.



Item 6 - Supported Browsers

- Internet Explorer 7 or higher
- Mozilla Firefox 2 or higher

Item 7a – RECORDS system



- 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

1 Enter your search terms (wildcard characters not needed)

Facility: [dropdown]
First Name: [text]
Employee ID: [text]
Document Type: [text]
Z ID: [text]
Comments: [text]
Sort: Facility [dropdown] ASC [dropdown]

Last Name: test
SSN: [text]
Year: [text]
Box: [text]
Batch ID: [text]

2 Click on the "Query" Button

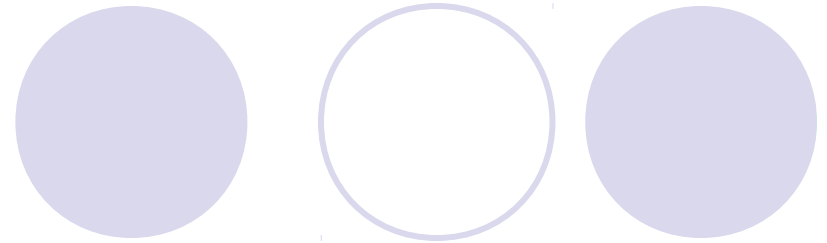
Query [button] Reset [button]

3 Look at the Records list to find your desired results

Page: 1 Results: 7

Facility	Last Name	First Name	SSN	Employee ID	Year	Document Type	Box ID	Z ID	Batch ID	Comments
						LEGACY MERGE FROM LEGACY	681484	BO	BO	
	TEST2	TEST	100000000		2006	CLERICAL TEST CLERICAL.PDF	1049907	BO	BO	
	TEST2	TEST	100000000		2007	MORETEST TEST0003A	1104309	BO	BO	
	TEST2	TEST	100000000		2007	PLACETEST TEST0001A	1104304	BO	BO	
	TEST2	TEST	100000000		2007	PLACETEST TEST0002A	1104306	BO	BO	
					2005	3RD QTR (110821A)	364906	BO	BO	

4 Click the Disk icon to download the file or the Eye icon to view the file in your browser.



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.