



## Searching for Boxes or Files Online

To request boxes or indexed files (files that have been itemized on our inventory) from Meyer Record Management, do the following:

1. Go to <https://recordsmgmt.meyerinc.com/>
2. Login with your Service USER NAME and PASSWORD.
  - a. If you forgot your USER NAME and PASSWORD, please call Customer Service at:
    - i. Windsor & Bedford Hills 800-358-3709 Option 6.
    - ii. Stratford 203-383-6175.
3. In SEARCH VALUE enter any known part of the descriptive information and click SEARCH.
4. Envision will search across your entire box and file inventory for any items with that information. The results will automatically be shown with the matching search values highlighted in yellow.
5. Once the desired item is located from the list of results click on REQUEST FROM OFFSITE and your item will be placed in your SHOPPING CART.
6. If you would like to export the results from your search, select the EXCEL EXPORT ALL, and a copy of the boxes or files you have in your search results will be exported to an Excel file on your local hard drive.
7. Additional report can also be generated on the REPORTS menu.
8. Repeat for other items needed.

This completes the process for searching for inventory items and creating and downloading inventory reports through Envision.