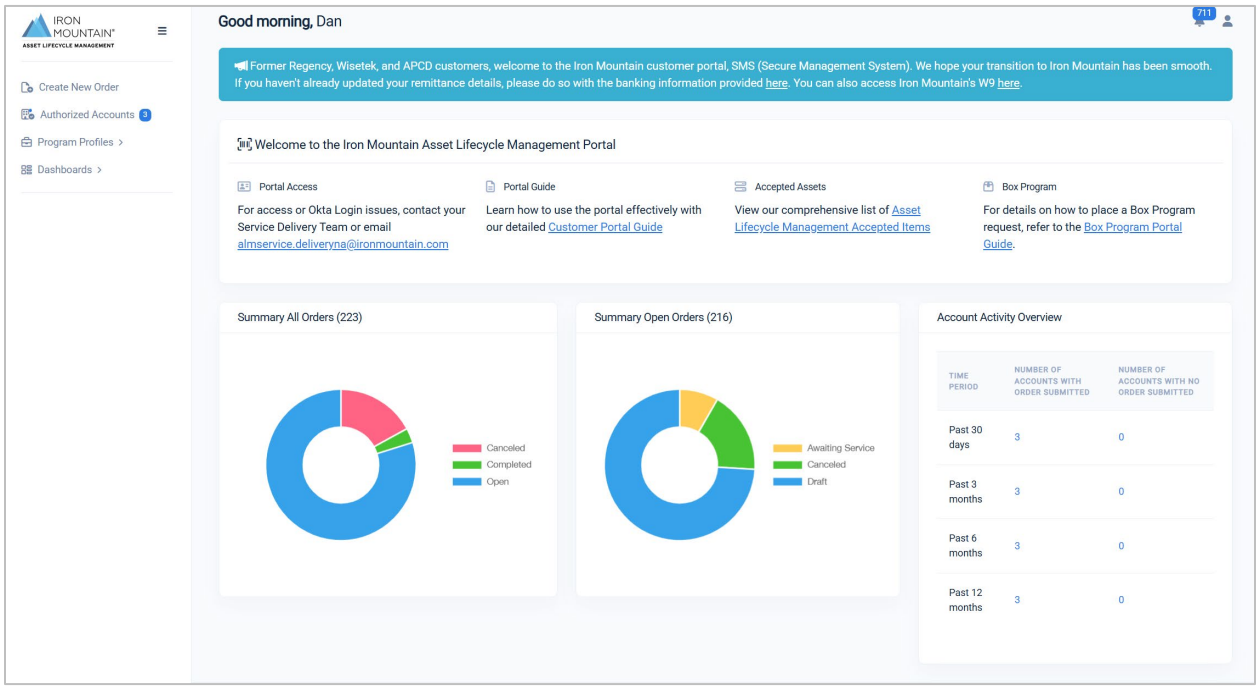
Asset Lifecycle Management Portal Guide



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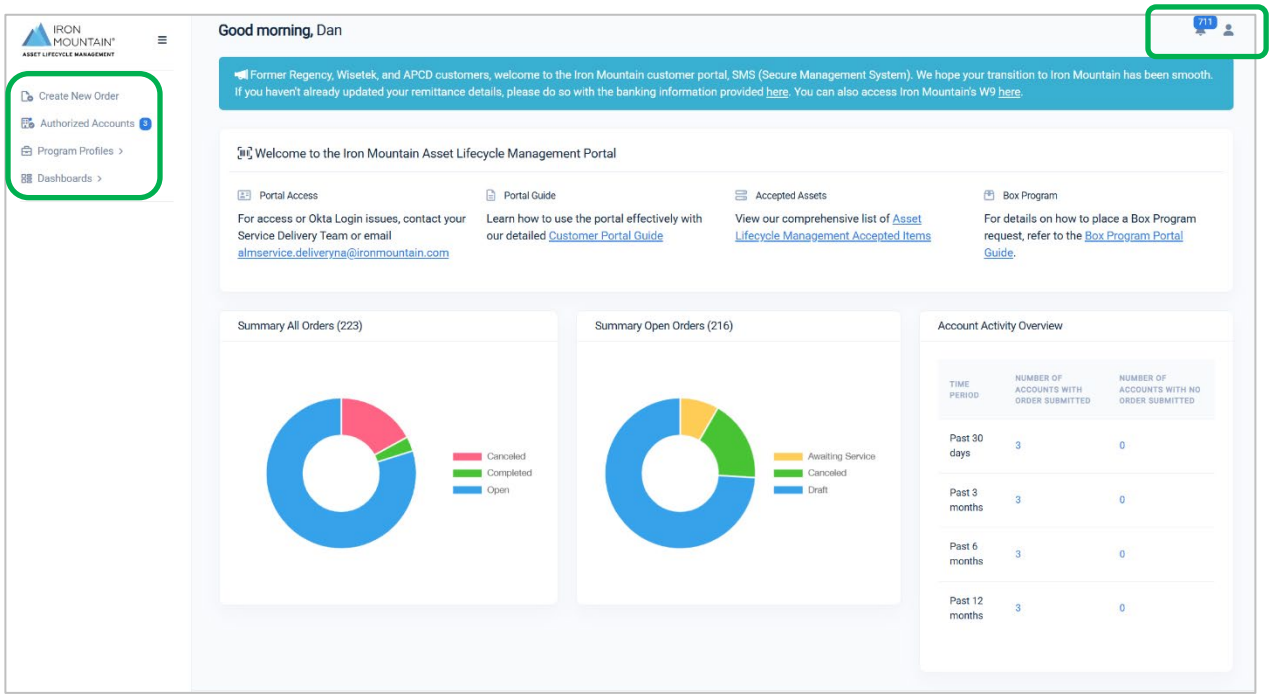
Home Screen

Page Navigation

Clicking a menu item displays information or other options

- Authorized Accounts
- Dashboards
    - Order Dashboard
    - Box Dashboard
    - Asset Search
    - Account Activity
    - No Account Activity
- Program Profiles
    - Program Profile
    - Program Contacts
    - Box Program Addresses
- Order - Initiates an order request
- Notifications Icon
    - View individual notifications List of all notifications
- User Name
    - Password change
    - Logout



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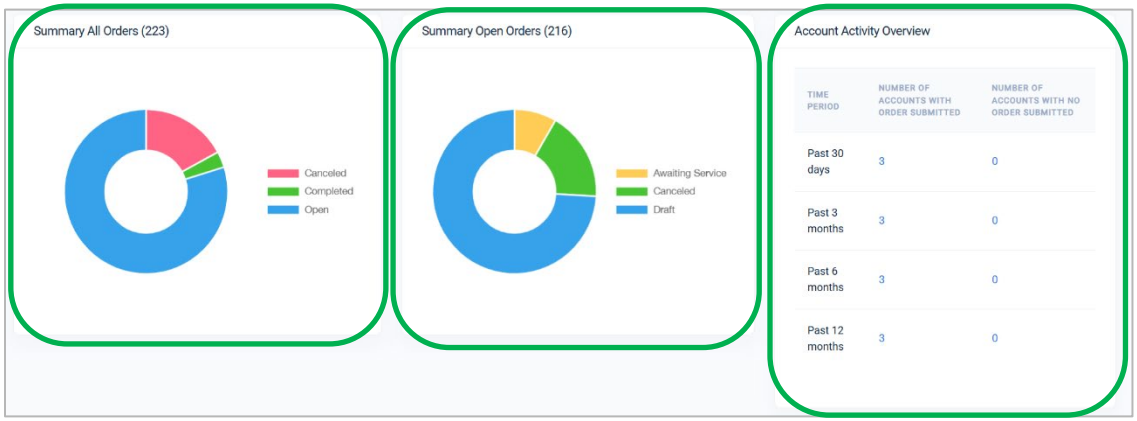
Order Activity Summary Graphs

Use the graphs to quickly access your order data.



Graph Data

- Complete Orders
- Open Orders

Summary Open Order Graph

- Draft
- Awaiting Service
- Customer Serviced
- Shipped to ITAD Facility
- Received at ITAD Facility

Status Descriptions

- Draft: Order has been created but not yet submitted by the customer
- Canceled: Order was created but later canceled prior to customer being serviced
- Awaiting Service: Order is placed but not yet serviced
- Customer Serviced: Iron Mountain has arrived at the customer site and removed assets or completed onsite media destruction
- Shipped to an ITAD Facility: The assets pickup up by Iron Mountain, are now in transit to ITAD facility
- Received at an ITAD Facility: The assets are delivered to the ITAD facility processing
- Complete: The ITAD facility has completed processing and the settle report and certificates are available on portal

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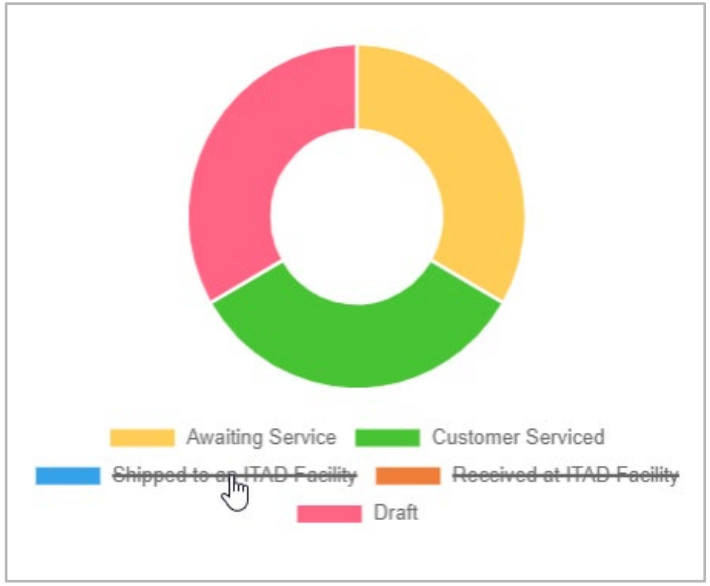
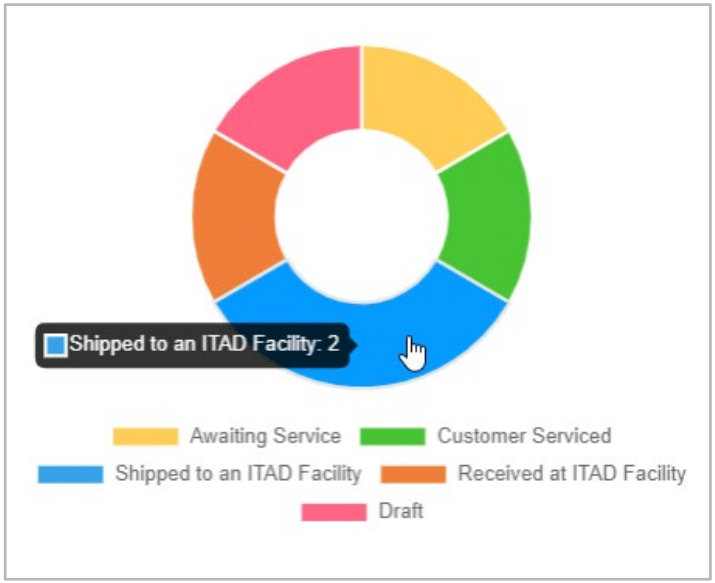
Using the graphs

- Click the category that is below the graph to remove it from the graph view.
- Hover over a category on the graph to view its order totals.
- Click a category on the graph, to view orders in that category. Displayed is the order dashboard in a pre-filtered view based on the category.





Note: See Order Dashboard section for detailed description of dashboard information

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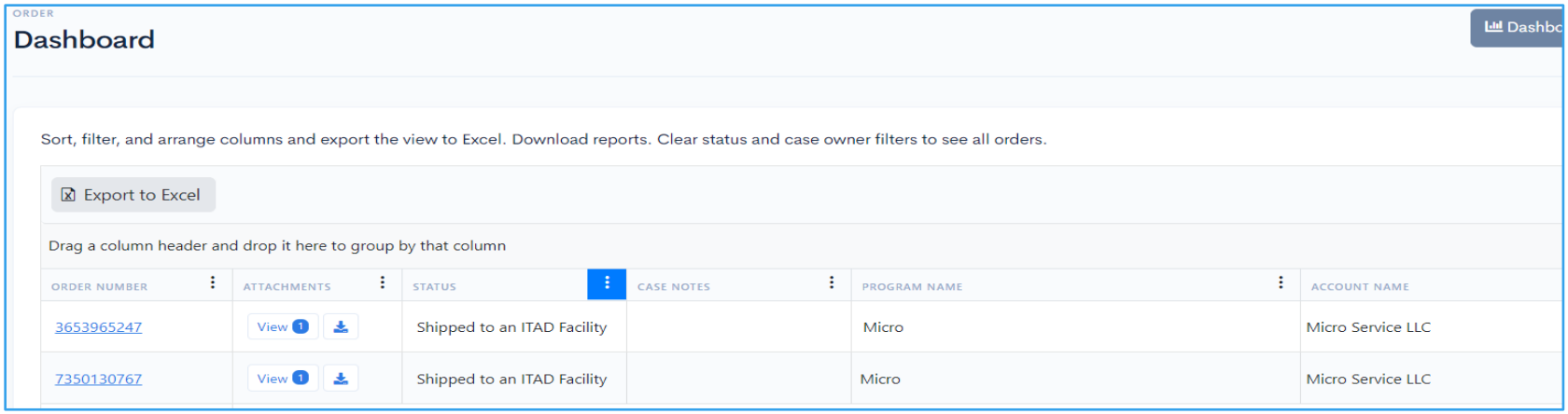

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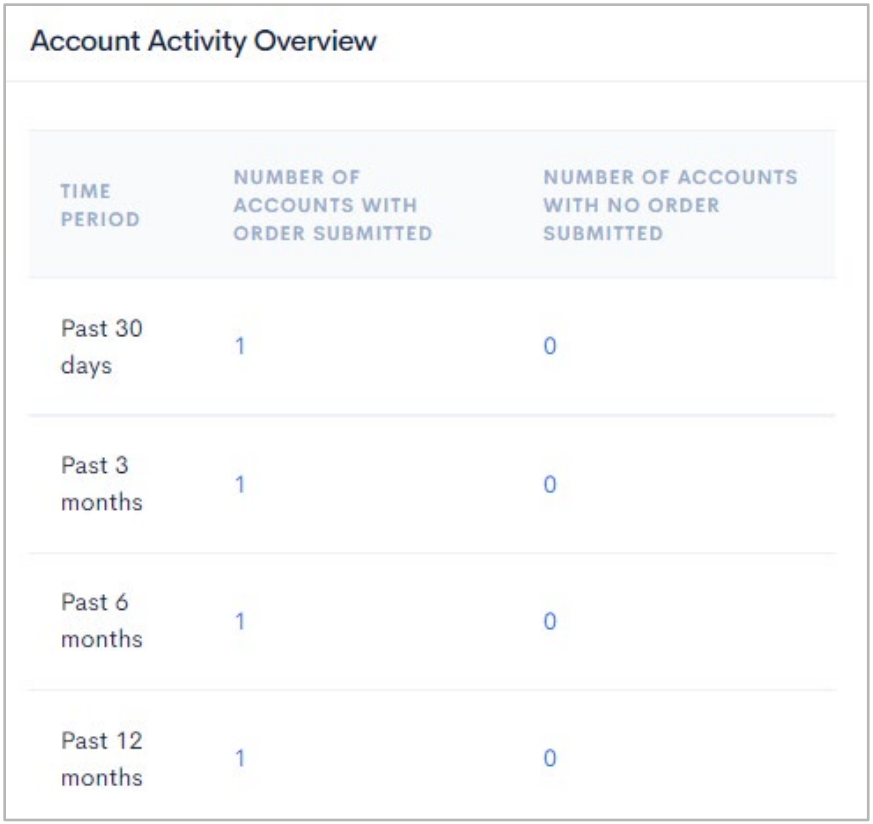
Account Activity Overview

Provides account activity stating which accounts are using SITAD services, broken down by set time ranges.

Click on a number value to review the data for the specific time period and criteria



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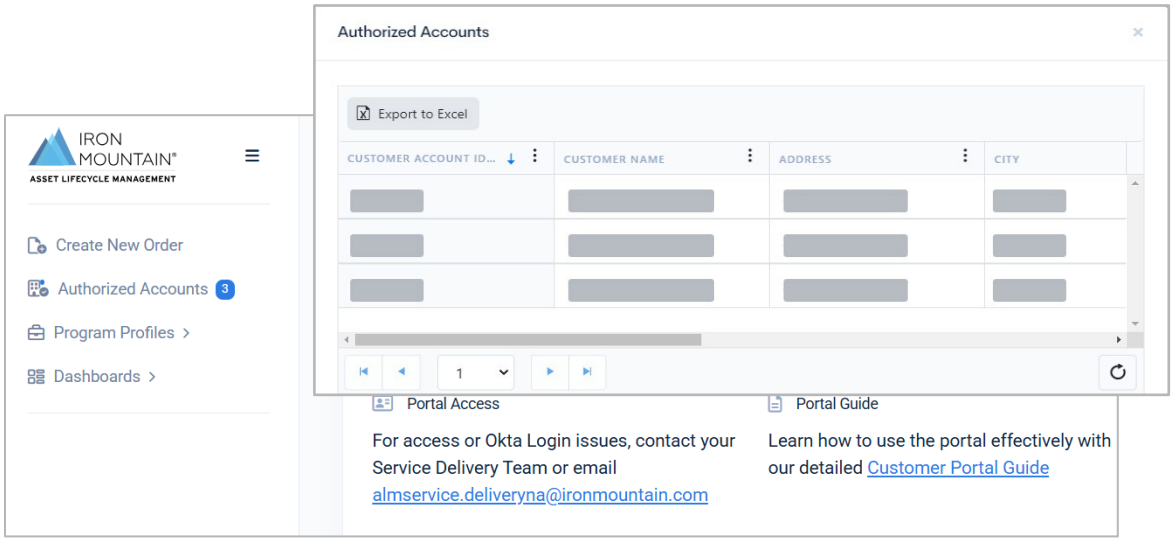
Account Information

Authorized Accounts

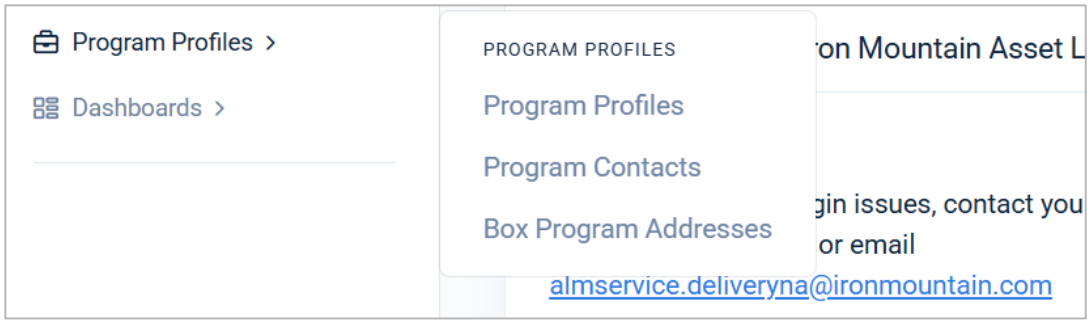
The logged in users can view the accounts that they have been authorized to request service for by accessing the Authorized Accounts link on the Home page. Displayed are the current accounts authorization has been granted



Program Profiles

Access Program Profiles

Acces the program profiles from the Home screen.



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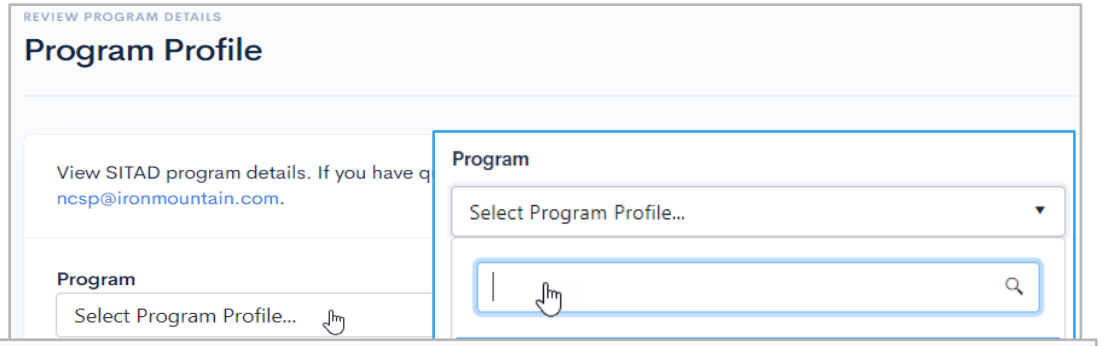
Click the drop down for Programs. Then select a program from the list. When there are several programs available to the user, they can type to search and narrow the results.

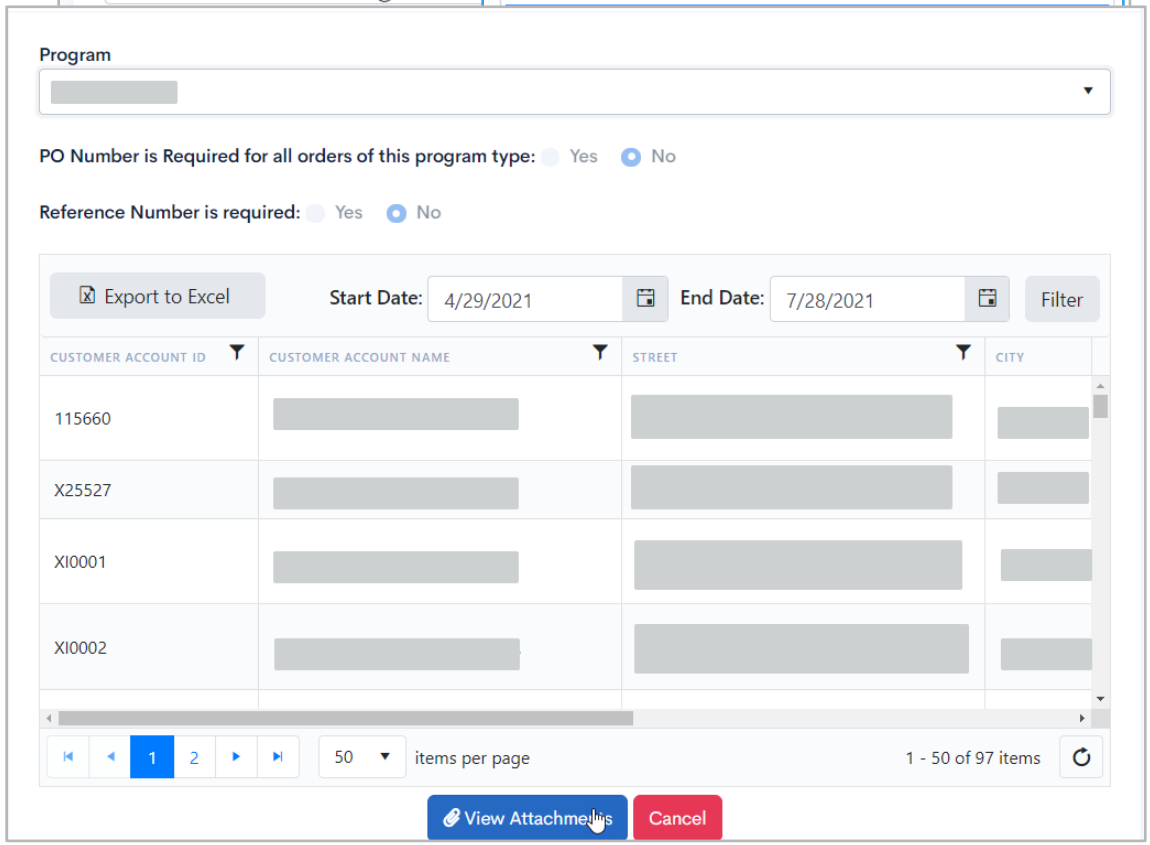


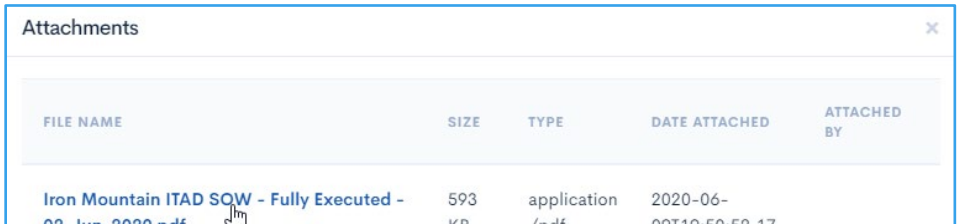
Reviewing Program Profiles

Once a program has been selected, the table provides all of the **customer account ids** and related **address information** associated with the program profiles. Also displayed is an **Order Count** for the filtered date range.

Program requirements related to PO Numbers and customer internal Reference Numbers are displayed.

Program documentation is available through the View Attachments button. Click each document to download it to your computer and view. The documentation details the agreed to program details between the customer and Iron Mountain.





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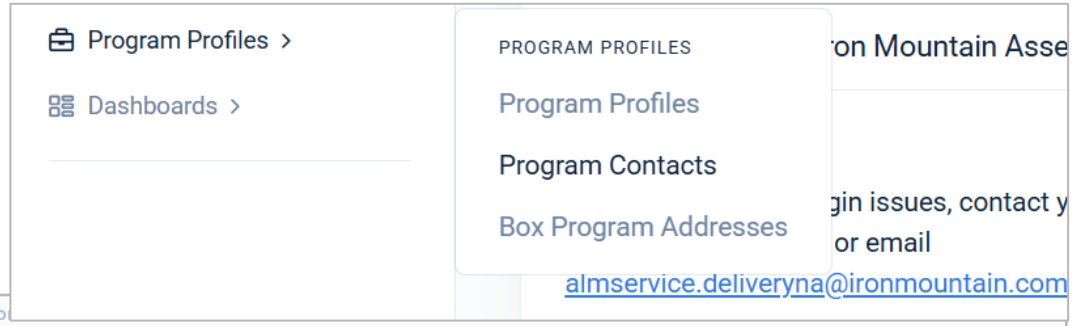
Program Contacts

The logged in user can add/edit Program Contacts on the Program Contacts page. These contacts within your organization will be included on any automated notifications/emails for orders associated with the selected program. You may also use this screen to block notifications that you don't want.

Access Program Contacts

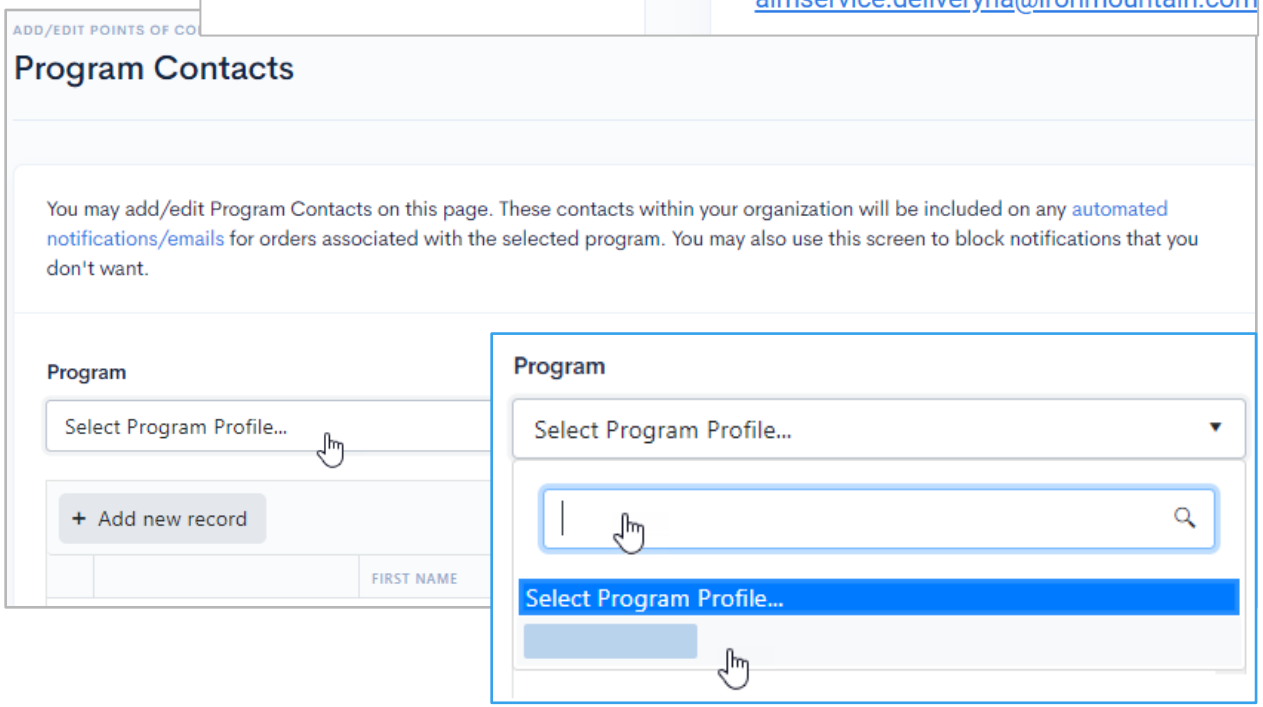
Access the Program Contacts from the Home screen.



Click the drop down for Programs.

Then select a program from the list.

When there are several programs available to the user, they can type to search and narrow the results



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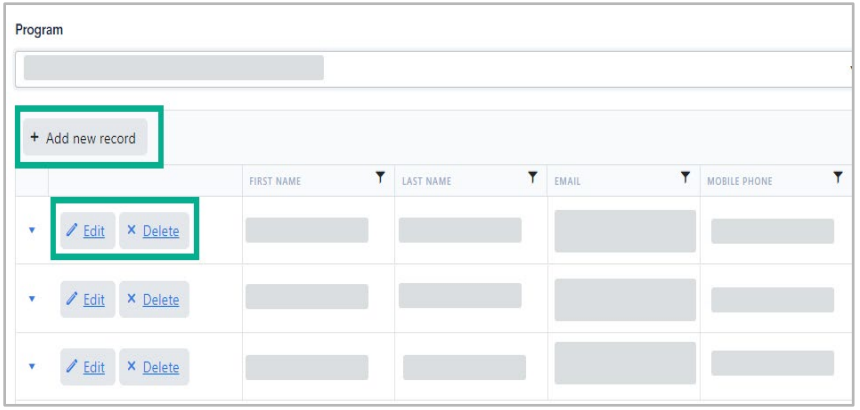
Add/Edit Program Contacts and Notifications

Once a program has been selected, the table provides a list of current **customer contacts** with their information and the **available notification types.**



Add/Edit/Delete contact

To **add a new** contact click “Add new Record”

To **edit or delete** an existing contact click the corresponding buttons

Follow the prompts to complete the add, edit or deletion.

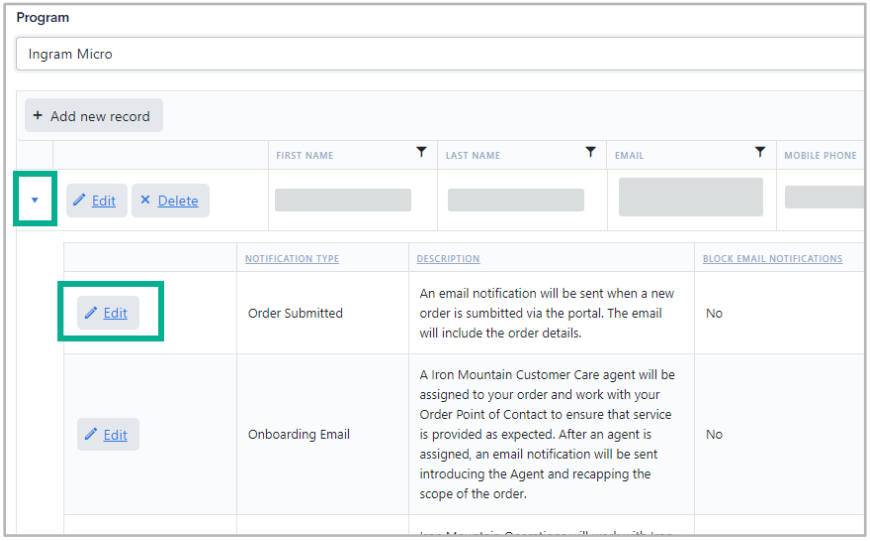
Enable or block a notification

Notifications are set by the individual user, one at a time. To view the current notification types with a complete description, access the Asset Lifecycle Managment Portal.

To view available notifications, click the expand arrow.

Scroll to the desired notification and click the edit button.

Follow the prompt to enable “YES” or disable “NO” for that specific notification.



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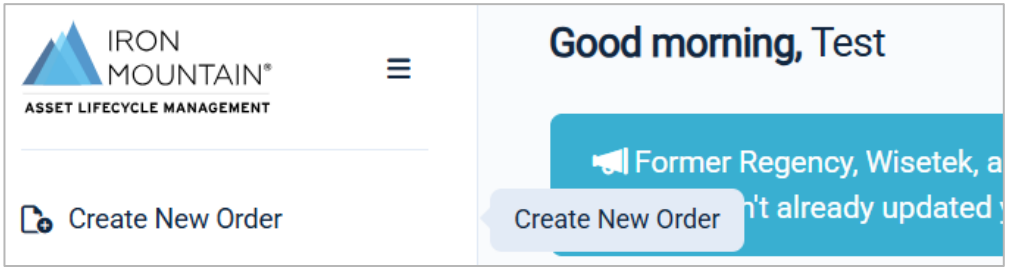
Ordering

The order process in the portal is driven by the Asset Lifecycle Program Type(s) agreed to between the customer and Iron Mountain. As users progress through the order placement process, choices and entries have a further impact on the information that is required for the order to be successfully placed.

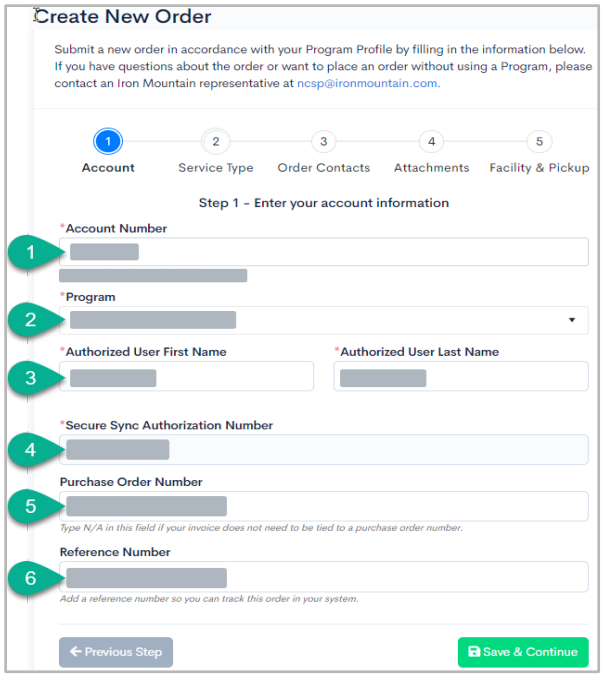


During order creation, five separate screens allow the user to identify the items for service, set order contacts with notifications and assist Iron Mountain with scheduling and service preparations for the selected Program.

Access Order Screen

Click Order on the screen header

Account Screen



1. **Account Number:** Enter the desired account number.
    a. Find account number by typing the address of the location
    b. Once selected, the corresponding address appears just below the account number field
2. **Program:** Select the Program Profile from this drop down menu
3. **Authorized User Name**: Self populates upon program selection
4. **Secure Sync Authorization Number**: Self populates upon program selection
5. **Purchase Order Number:** When a selected program requires a PO number it must be entered here
6. **Reference Number:** This is a customer internal reference number that can be used to relate an Asset Lifecycle Management order to an internal tracking number. If required by the program it must be entered here.

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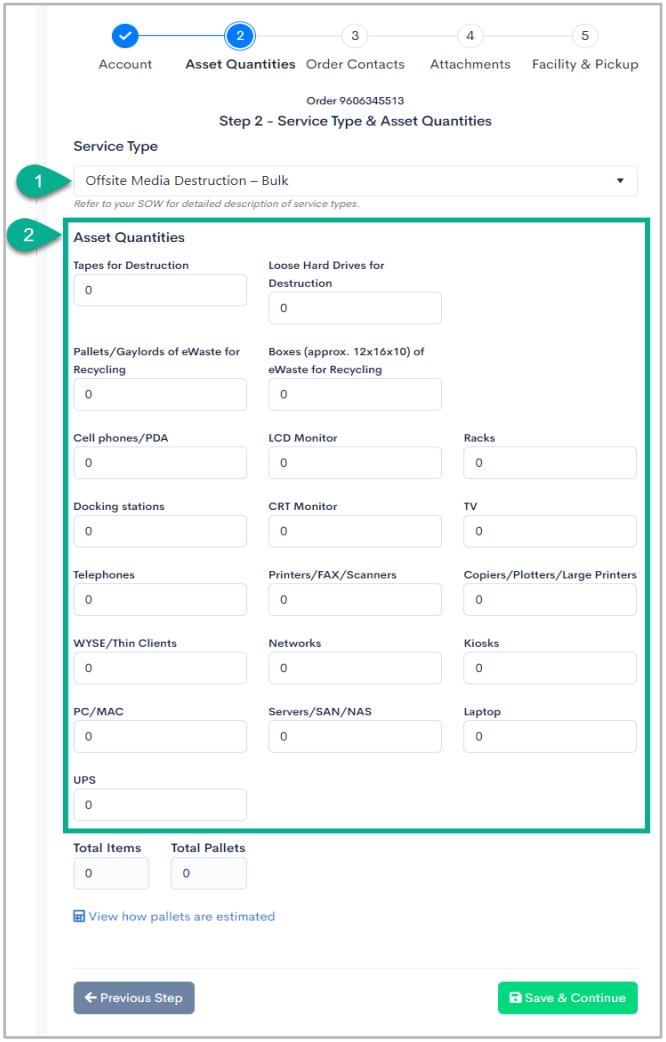
NOTE: Unsubmitted orders appear on Order Dashboard with the status of draft.

Asset Quantities Screen

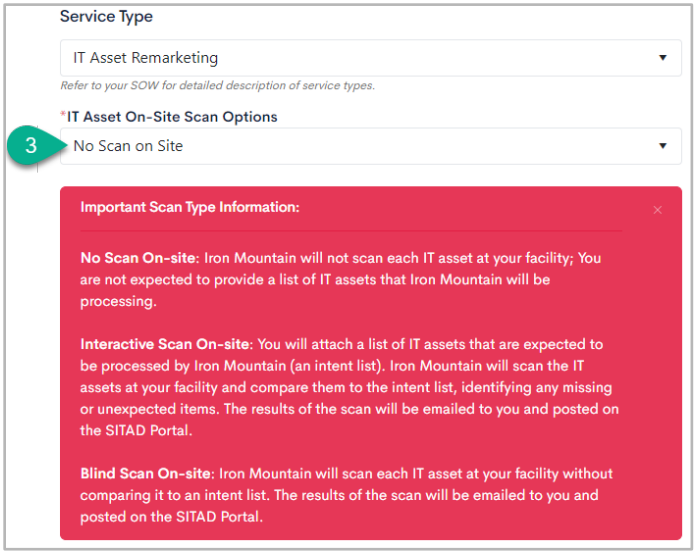
1. Service Type: Select a service type
2. Enter a quantity for the applicable asset types that will be processed.



The screen will total the number of items and the total number of pallets. How the pallet calculations are estimated is available through the link on the page.

3. Some service types when selected enable the option for **On-Site Scanning of IT Assets** before entering asset quantities.

By default **No Scan on Site** is selected. Users can change this to **Blind Scan** or **Interactive Sca**n.
Note: Interactive scanning requires an intent list to be uploaded to the order.



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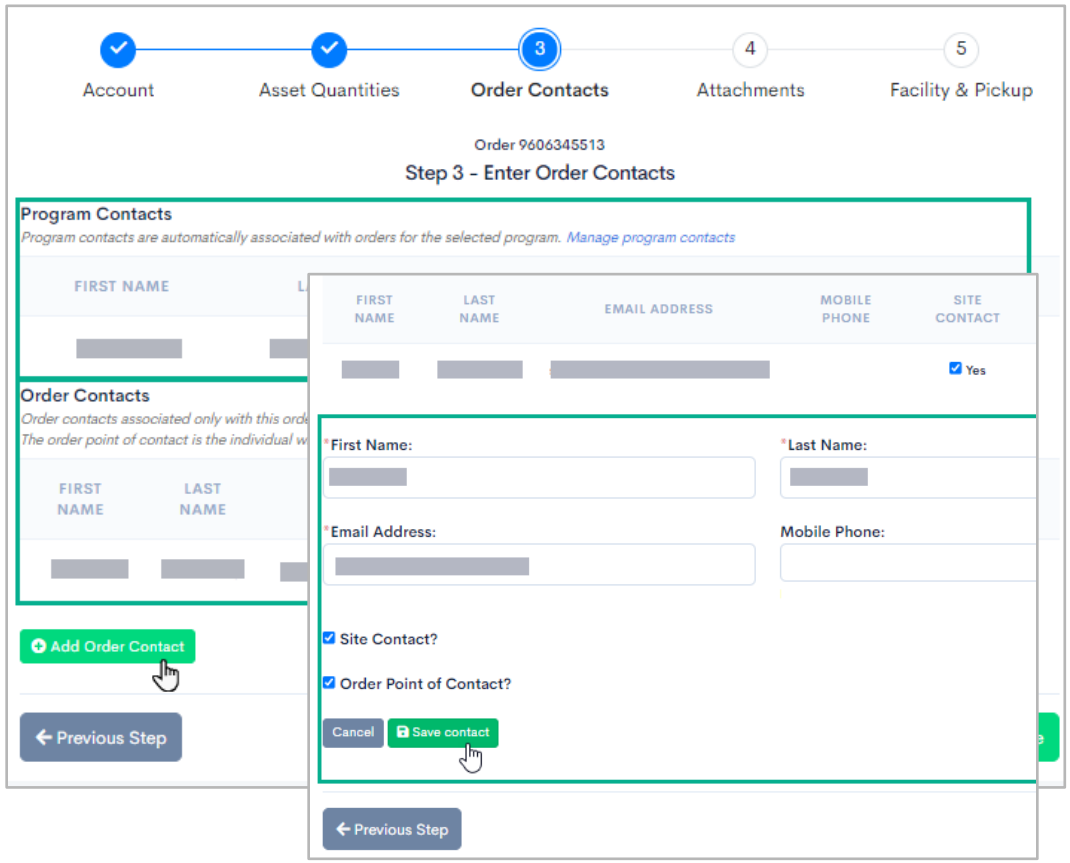
Order Contacts Screen

Contacts shown are the Program Contacts and then Order Contacts. The program contact is only edited from the Manage Program Contacts. By default the logged user is the Order Contact for the site where service will be requested and the order point of contact.

To added additional contacts and change the contact types, click Add Order Contact button

Enter the required contact information and select their contact type, Site Contact and or Order Point of Contact..



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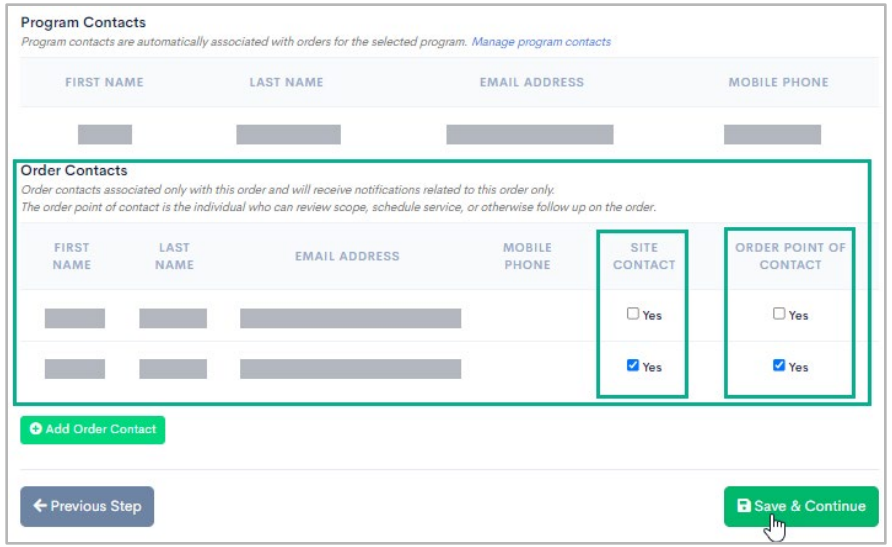
Once two order contacts are listed the user's logged in contact type can be changed



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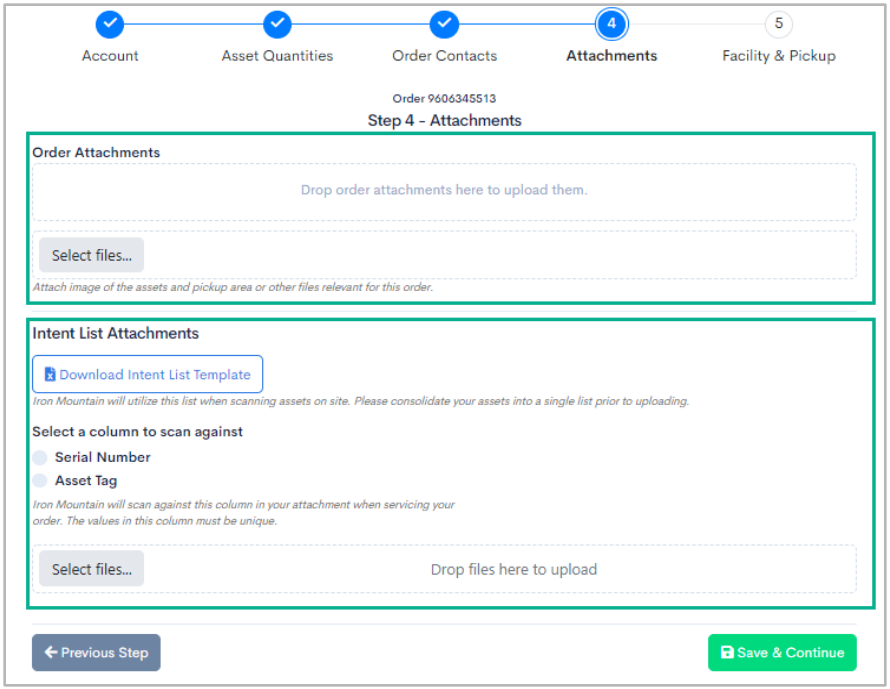
Attachments Screen

Order attachments enable Iron Mountain to plan for the service and when Interactive Scanning has been requested an Intent List can be submitted.

Order attachment section: Here add images of assets to be picked up, images of site access ease or challenge, parking, loading dock. Also add any other useful information that would assist Iron Mountain to plan for the service.

Intent List Attachments section:

- Download Intent List Template to populate
- Upload the populated Intent List
- Select the column which the Iron Mountain will scan against.



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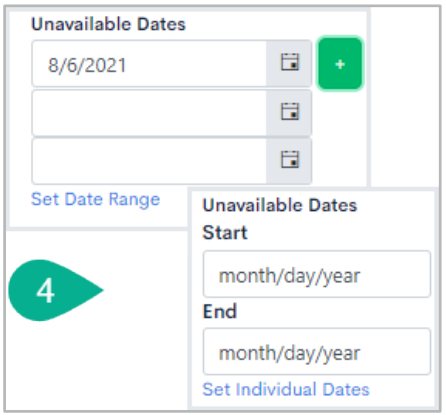
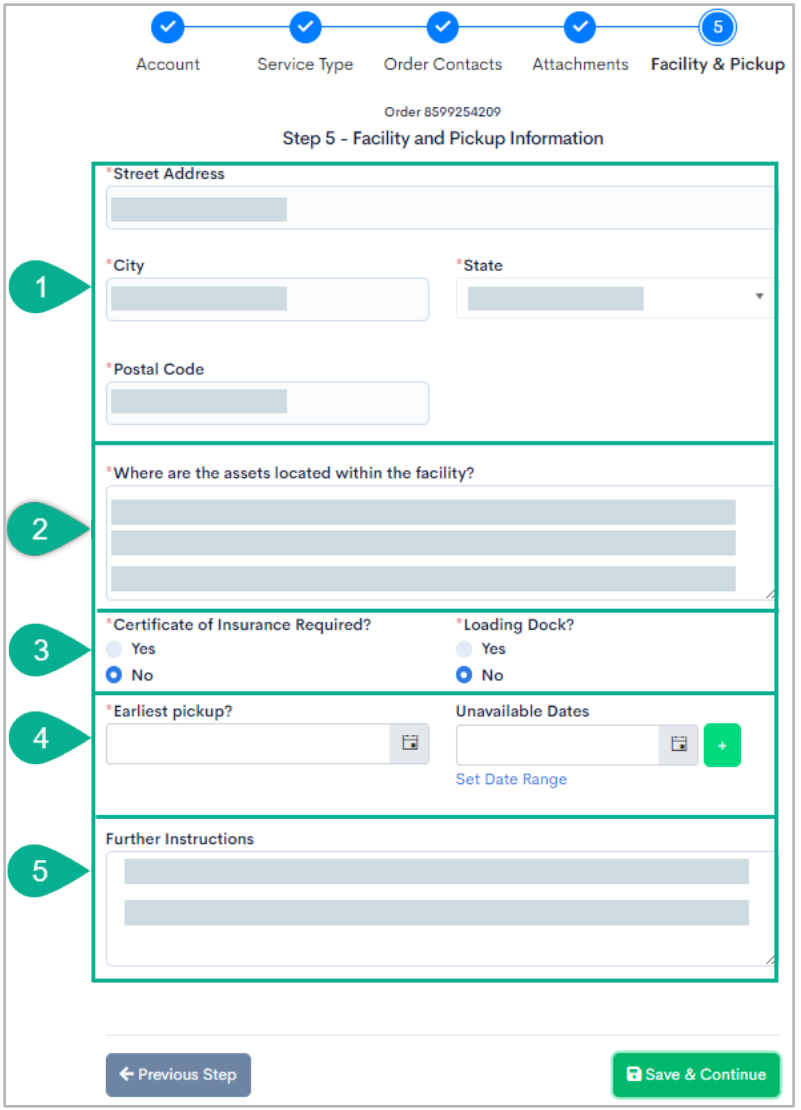
Facility & Pickup Screen

1. Address pre-populates based on the account selected on the initial screen.
2. Describe where the assets are located within the facility.
3. Answer Yes or No to the Certificate of Insurance and Loading Dock questions.
4. Enter Service Date information
    a. Earliest pickup date
    b. Date(s) not available. Enter a specific date or a date range
5. Enter Further Instruction that can enable a better understanding of the asset requirements, accessing or arrival information or….
6. Click Save & Close to submit your order.





Canceling Order

During the order creation process, orders can be canceled on pages two through five.

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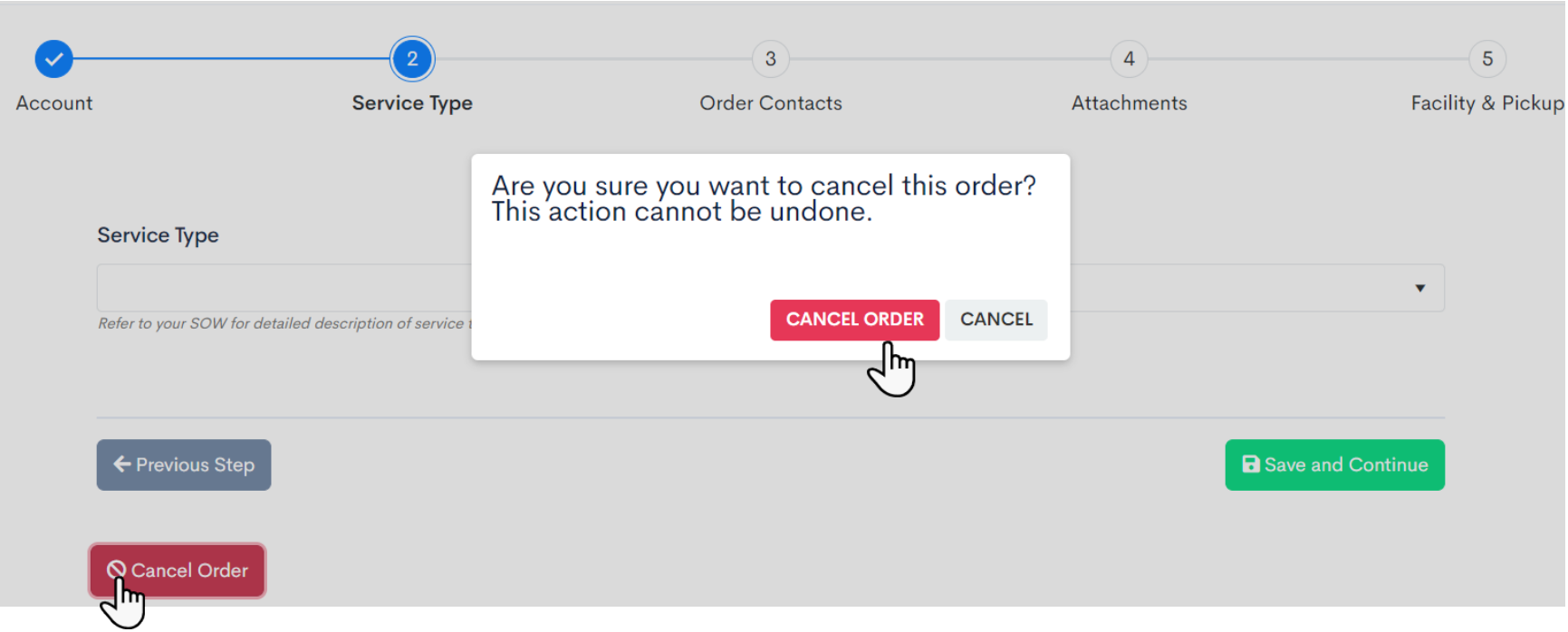
1. Click the red Cancel Order button.
2. In the prompt, click Cancel Order to confirm the action.



Notifications

The bell icon next to the user's name, when a number is present represents a new alert(s) is present to review.

Click the icon to view a drop down that displays the active notifications.

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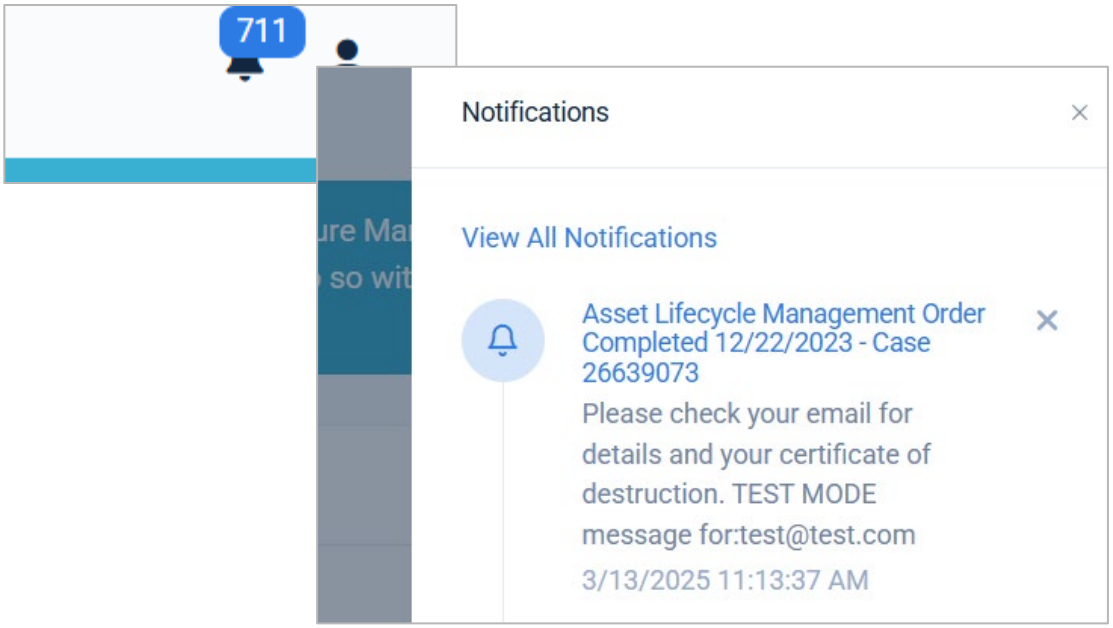
When more details are available, click the link. To remove the notification, click the x for the notification.

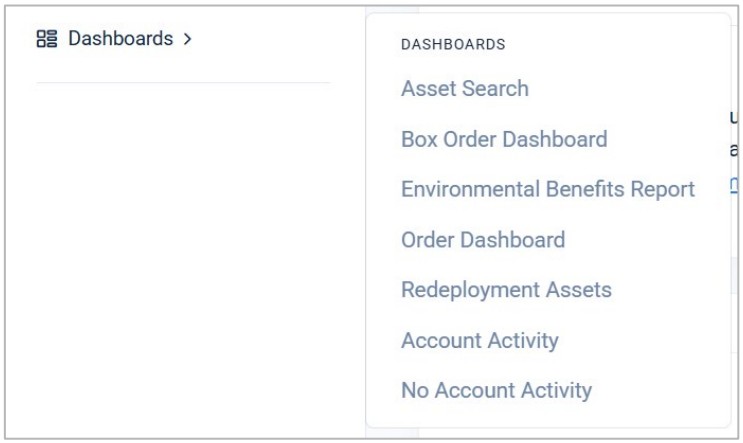
Click View All Notifications, to view notifications in a list.



Dashboards

Specific dashboards exist that provide data for Orders, Assets, Account Activity or Lack of Activity. When a customer has a box program they can access the Box Dashboards.

After you set a grid with specific sort, ordering and filtering user's can name and save those settings to easily reload later.



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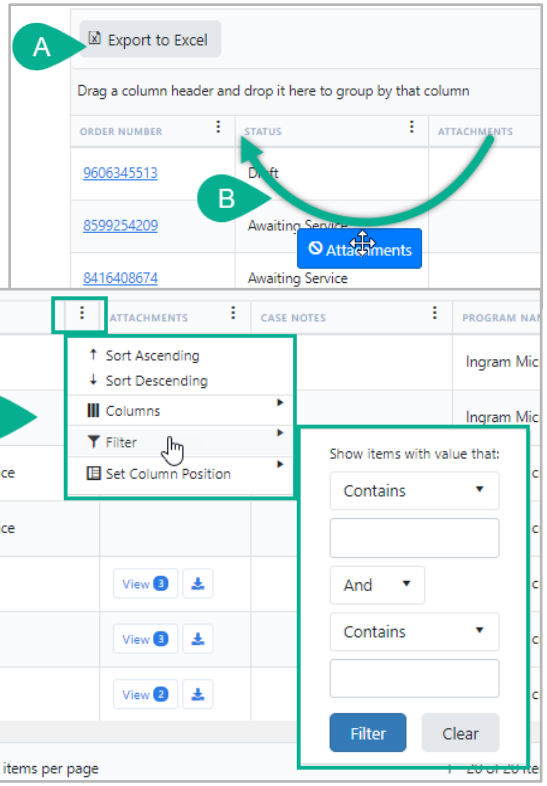
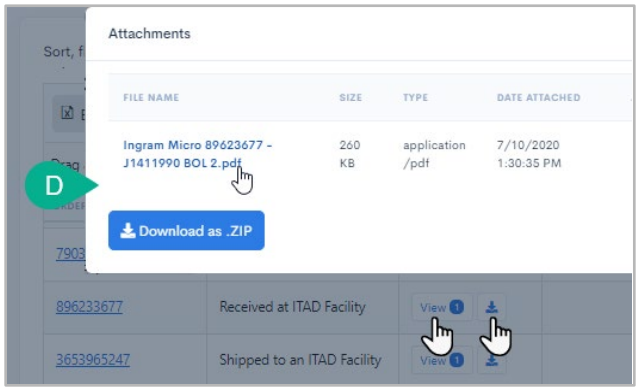
General Dashboard Guidance

A. Data can be exported from the table.
B. Reorder the columns by clicking and dragging the header.



C. Each column can be sorted or filtered or reordered by clicking the three dot menu for that column. To save the setting, see Save and Load Grid Setting section.

D. Attachments can be downloaded. Click the view button to display a list of attachments. then download them. Optionaly, click the download icon to download all.



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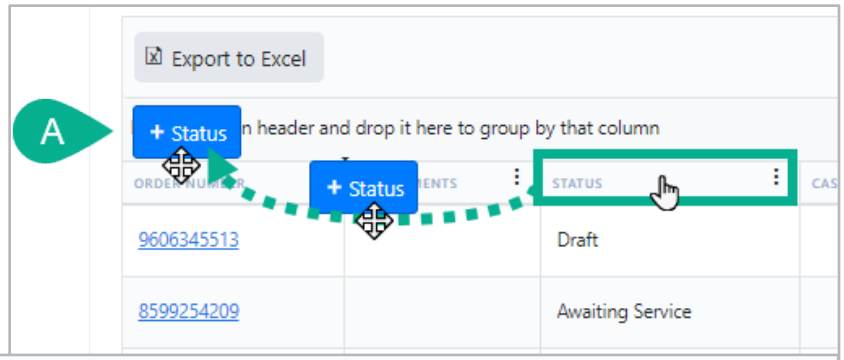
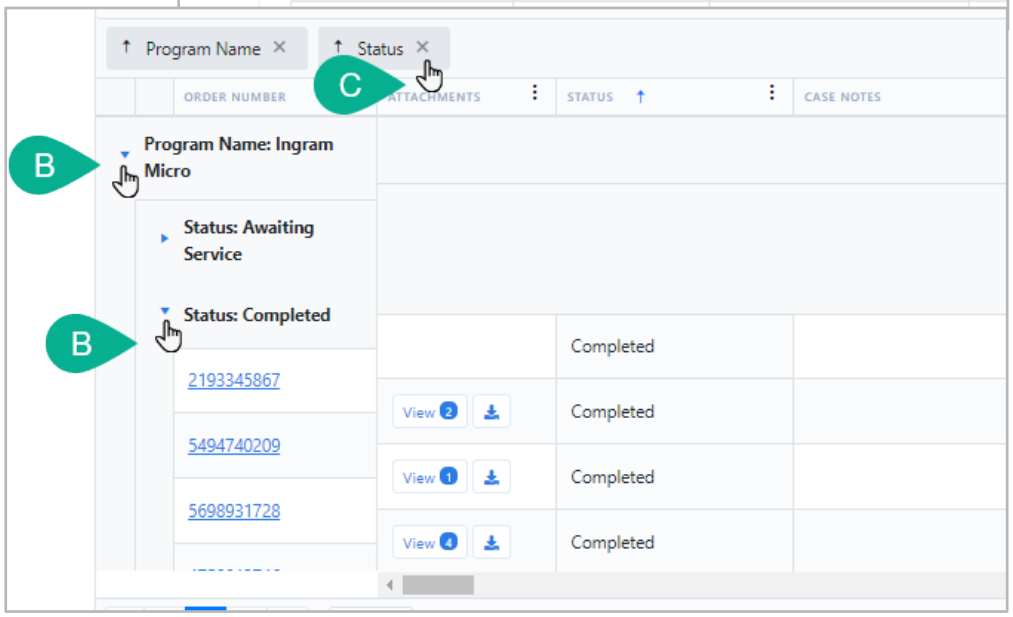
Group Dashboard Data

A. Drag a column header(s) to group by that column. Example groups by Program Name then Status



B. Click the arrow to close or show the grouped data.

C. Remove grouping by:
   a. Dragging the header out of the group criteria field OR
   b. Click the **x** of the header in the filter



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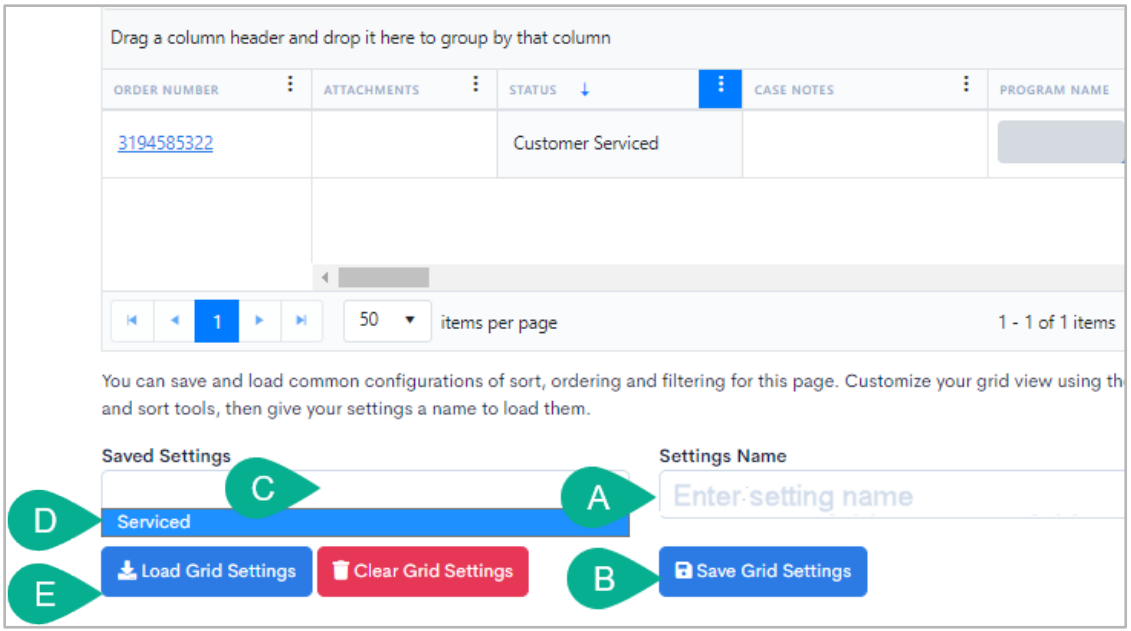
Save and Load Grid Setting

Once the dashboard is sorted, filtered and or columns reordered.

A. Enter a setting name
B. Click Save Grid Setting

To load one of your saved settings.

C. Click in the Saved Settings box
D. Click the name of a Save Grid Setting from the drop down.
E. Click the Load Grid Setting button



Order Dashboard

Allows access to your orders and provides relevant data.

- Status
- Attachments
- Case Notes
- Program Name
- Account Name
- Account Number
- Order Placed By
- Address
- Submission Date
- Service Completion Date
- Shipped Date
- Completion Date
- PO Number
- Reference Number
- Invoice Number
- Invoice Date
- Case Owner

Existing orders can be duplicated from the order dashboard table.
Order Attachments can be viewed or downloaded

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Asset Search Dashboard

All assets that were audited will appear on this dashboard. There are 40+ possible data points for each asset that may or may not be utilized.

Click the corresponding order number, to access the Quick View of the order. The submitted order information can be viewed by clicking the View Order button on the Quick View screen.

Account & No Account Activity Dashboard

Choose the dashboard desired, then set the Time Period. Displayed are the accounts which have had or did not have activity for that time period.