



Client User Guide



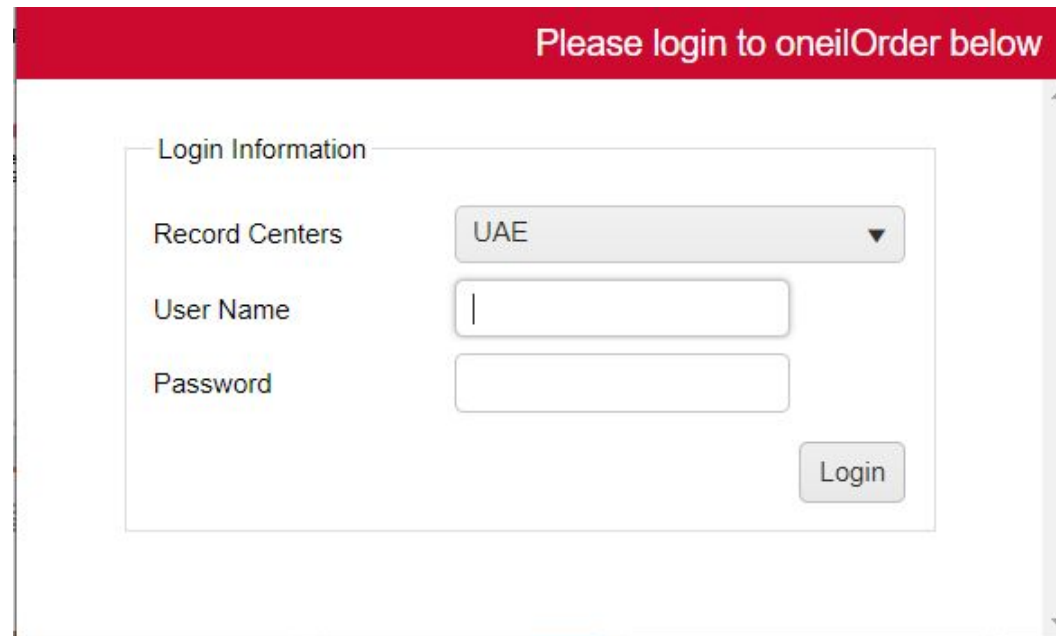
OVERVIEW

- Secure Online Platform
- Quick Access to your records
- Easy and Efficient records management and order processing
 - No emails, no online forms
- Direct access right from your desktop and from any browser
- Unlimited number of users

LOGGING IN

Security is important to you and your records. oneilOrder respects that and requires that everyone who logs in have a current User Name and Password. These names and passwords are set up through Iron Mountain.

- *Note: It is supported in Internet Explorer, Firefox, Chrome, Safari, and Microsoft Edge. Standard browser functions apply while using oneilOrder.*

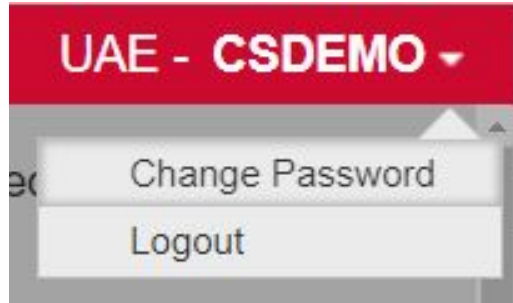


The screenshot shows a login interface for oneilOrder. At the top, a red banner contains the text "Please login to oneilOrder below". Below this is a "Login Information" section with a white background and a thin border. It contains three input fields: "Record Centers" with a dropdown menu showing "UAE", "User Name" with a text input field containing a vertical cursor, and "Password" with a text input field. A "Login" button is located at the bottom right of the form area.

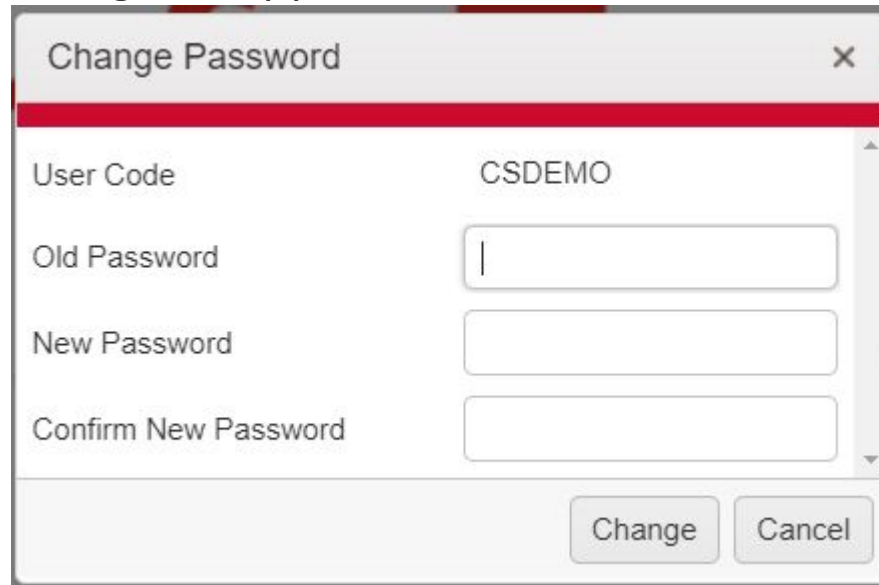
To access the portal, click this link: <https://portalmenat.ironmountain.com/oneilOrder>

CHANGE PASSWORD

- To change your password at any time, click the down arrow next to your user name in the top right corner of the screen and select **Change Password**.



- The **Change Password** dialog box appears.

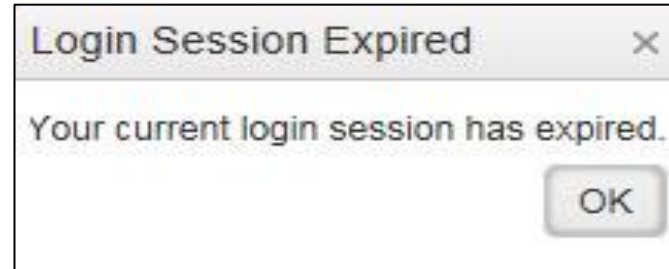
A screenshot of the 'Change Password' dialog box. The dialog box has a title bar with 'Change Password' and a close button (X). The main area contains the following fields:

- User Code: CSDEMO
- Old Password: [Empty text box]
- New Password: [Empty text box]
- Confirm New Password: [Empty text box]

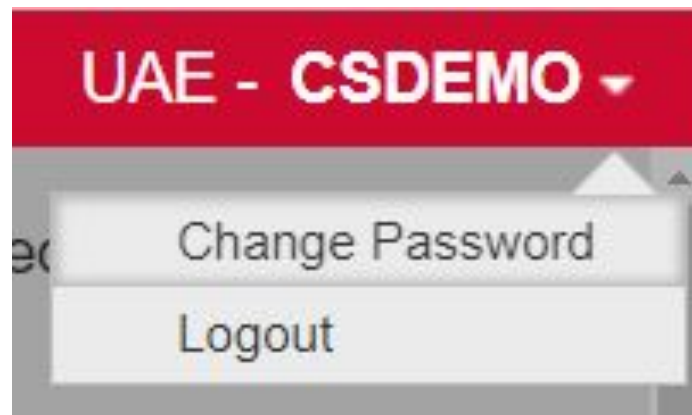
At the bottom right of the dialog box are two buttons: 'Change' and 'Cancel'.

TIME OUT & LOGGING OUT

- oneilOrder has a built-in time out feature. After a certain period of inactivity, you will be logged out. You will be required to log in again in order to continue working.



- When you have finished using oneilOrder, you should always log out. Click the drop down arrow next to your user name in the top right corner of the screen and select **Logout**.

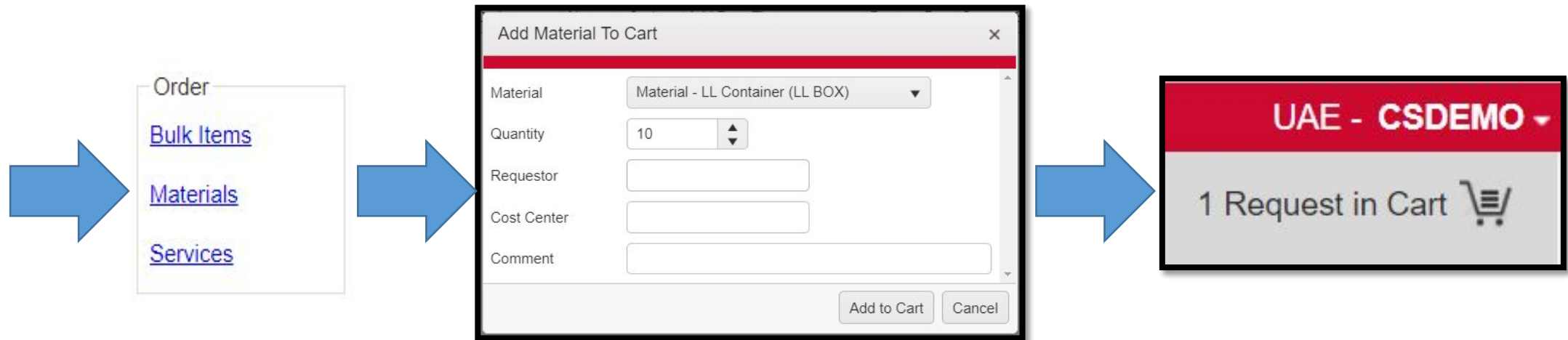


MATERIALS REQUEST

Materials are items that you can purchase (or receive) from the Iron Mountain. Commonly this includes containers of various sizes and barcode labels. Iron Mountain determines what materials are available for ordering.

Directions:

□ **Order > Materials > Select Material Type > Enter Quantity > Add to Cart > Go to cart (top right)**
(Check Out Web Order will be provided on a different slide)



IMPORTANT NOTE

You will skip this request if you do not intend to do the Data Entry and the Packing & Inventory yourself.

COLLECTION OF ITEMS REQUEST

These are requests for the collection of the new boxes/files that are ready to be added for the first time into your inventory with Iron Mountain.

There are two types of collection:

❑ ***Collection with Self-Data Entry, Packing and Inventory of the New Boxes/Files***

**Note: if you chose to do your own Data entry and Packing & Inventory, you save on your data entry and Packing & Inventory charges; these charges would not be applied to your billing statement helping you save cost over these services.*

❑ ***Collection with Iron Mountain-Data Entry, Packing and Inventory of the New Boxes/Files***

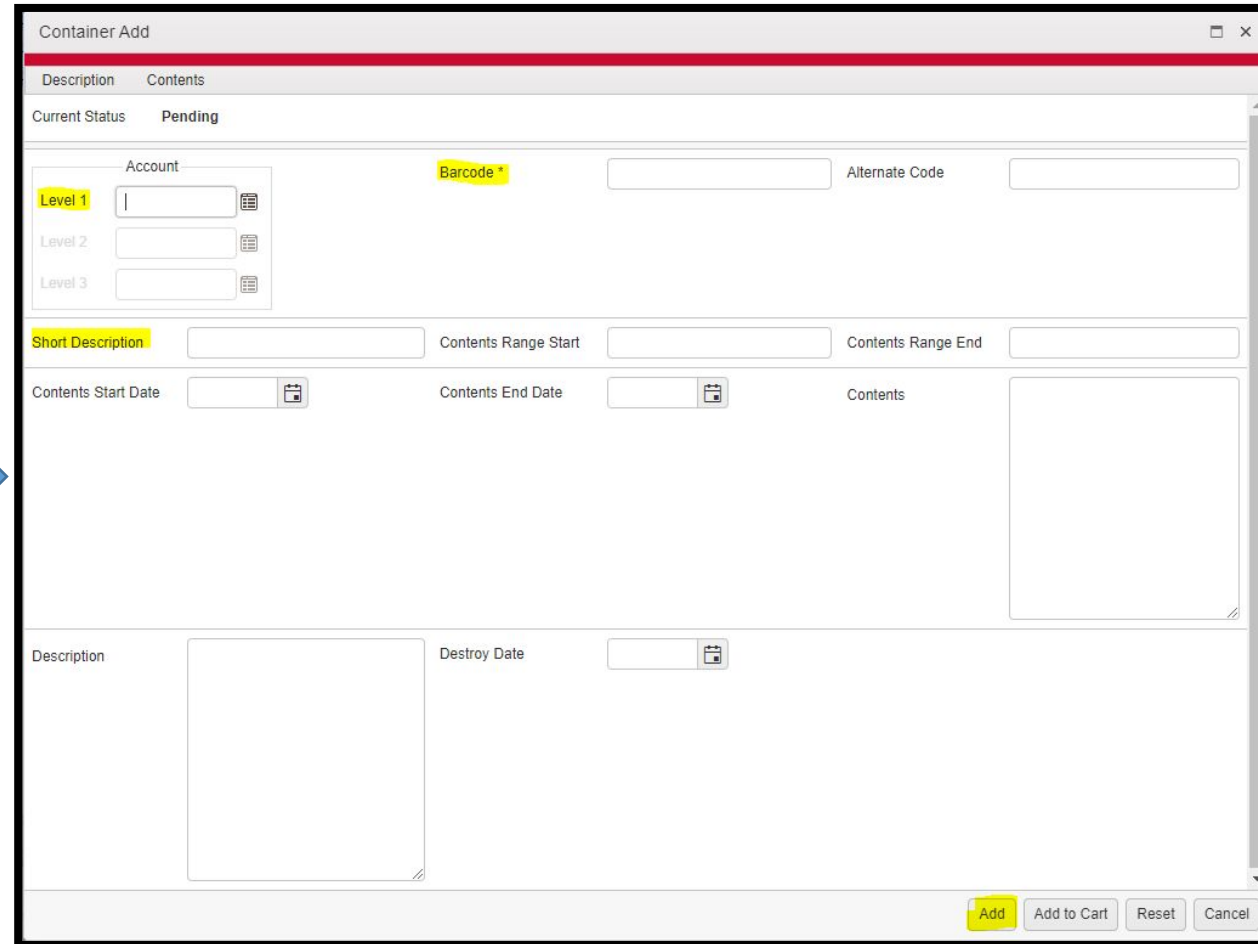
**Note: you will not do the Data Entry, Packing or Inventory; Iron Mountain will do it for you. However, you will be charged for it per box and per file data entered (as agreed in the contract). You will only need to provide us with the details of your items on collection.*

COLLECTION WITH SELF DATA ENTRY AND PACKING

- ❑ Your first step would be to do the data entry on the online portal for the new boxes and files that you intend to request for collection. You will first add the new Container and then you will add the new files to that container one by one.

Directions (CONTAINER)

Inventory > ADD Container >
Enter details of the box > ADD

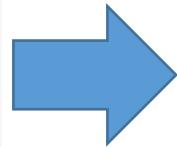
A screenshot of the 'Container Add' form in an online portal. The form is titled 'Container Add' and has a red header bar. It contains several sections: 'Description' and 'Contents' tabs at the top; 'Current Status' set to 'Pending'; an 'Account' section with 'Level 1', 'Level 2', and 'Level 3' input fields; a 'Barcode *' field; an 'Alternate Code' field; a 'Short Description' field; 'Contents Range Start' and 'Contents Range End' fields; 'Contents Start Date' and 'Contents End Date' fields with calendar icons; a 'Contents' text area; a 'Description' text area; and a 'Destroy Date' field with a calendar icon. At the bottom right, there are four buttons: 'Add' (highlighted in yellow), 'Add to Cart', 'Reset', and 'Cancel'.

*NOTE:

- You may repeat the steps if you have multiple boxes to be added to request
- You do not have the option for a bulk upload of all your boxes and files into the online portal.

Directions (FileFolder)

Inventory > ADD FileFolder > Enter details of the file > ADD Filefolder



The screenshot shows a web form titled "Filefolder Add". At the top, there are tabs for "Description" and "Contents", with "Description" selected. Below the tabs, the "Current Status" is "Pending". The form contains several input fields and sections:

- Account:** A section with three levels: "Level 1", "Level 2", and "Level 3", each with a text input field and a small icon.
- Barcode*:** A text input field with a yellow highlight.
- Alternate Code:** A text input field.
- Short Description:** A text input field with a yellow highlight.
- Container Barcode:** A text input field with a yellow highlight.
- Contents Range Start:** A text input field.
- Contents Range End:** A text input field.
- Contents Start Date:** A date picker field with a calendar icon.
- Contents End Date:** A date picker field with a calendar icon.
- Destroy Date:** A date picker field with a calendar icon.
- Description:** A large text area.
- Contents:** A large text area.

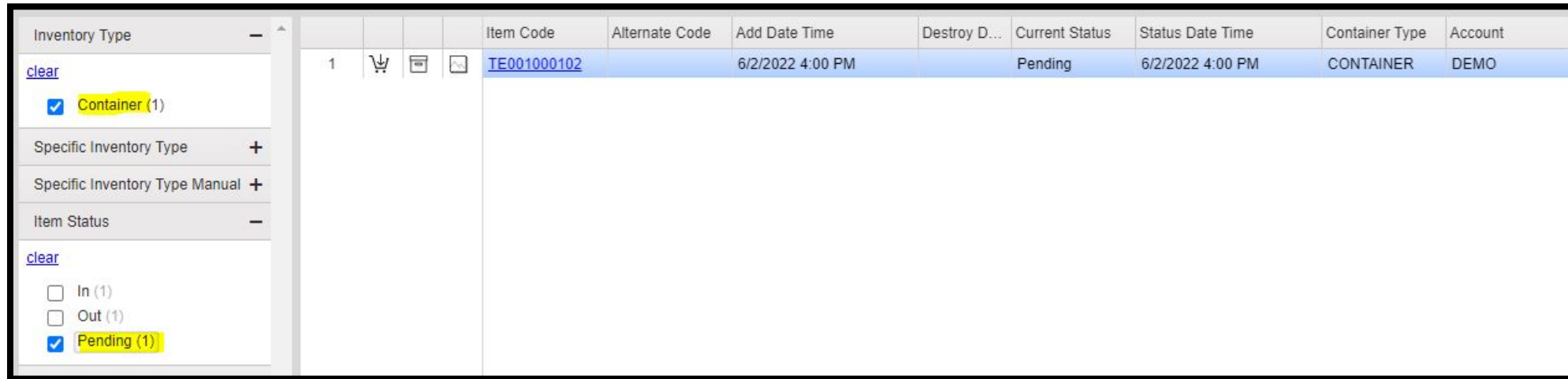
At the bottom right of the form, there are four buttons: "Add" (highlighted in yellow), "Add to Cart", "Reset", and "Cancel".

**NOTE: skip this step if you are on a Box level: barcoding only the box and not the files in it*

Adding to Cart

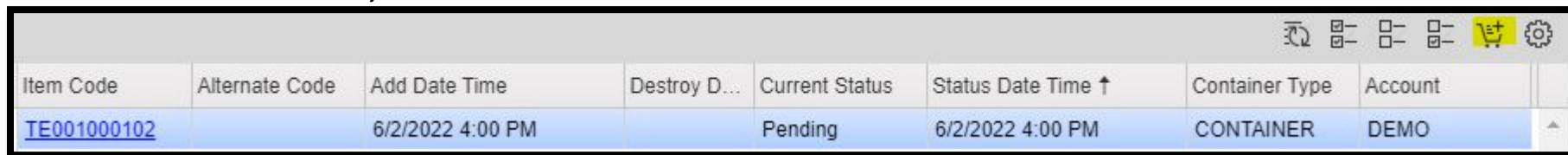
Note: for file level customers, collection of new boxes and files entered by the customer through the online portal, the request should be placed on the box level and not on the file level. This is because you have already packed these files in boxes.

- Search for all Boxes that were added; All these new boxes will show up in the Pending status. (You can use the following option. On Filtered search pane, Expand Item Status and check Pending Check box)



Inventory Type	Item Code	Alternate Code	Add Date Time	Destroy D...	Current Status	Status Date Time	Container Type	Account
clear <input checked="" type="checkbox"/> Container (1) Specific Inventory Type + Specific Inventory Type Manual + Item Status - clear <input type="checkbox"/> In (1) <input type="checkbox"/> Out (1) <input checked="" type="checkbox"/> Pending (1)	1		6/2/2022 4:00 PM		Pending	6/2/2022 4:00 PM	CONTAINER	DEMO


- Once the results are shown on the search results pane, Click Add to cart option at the top right corner of the page (highlighted on below screenshot)







Item Code	Alternate Code	Add Date Time	Destroy D...	Current Status	Status Date Time ↑	Container Type	Account
TE001000102		6/2/2022 4:00 PM		Pending	6/2/2022 4:00 PM	CONTAINER	DEMO

Checking Out Order

Click CART from TOP RIGHT

2 Requests in Cart 

Highlight the items that wants to be checked out

			Item Code	Alternate Code	Add Date Time	Destroy D...	Current Status	Status Date Time	Container Type	Account
1			TE001000102		6/2/2022 4:00 PM		Pending	6/2/2022 4:00 PM	CONTAINER	DEMO
2			DEMO124		6/6/2022 11:48 PM		Pending	6/6/2022 11:48 PM	FILEFOLDER	DEMO

Check Out Web Order

Requests in this order 2

Account
DEMO \ \

Address
Contact Jefferson
Address
Phone
Fax
Choose Address
Use Default Delivery Address

Notes

Place Web Order Cancel

Fill in the details such as Account (department to archive/charge the items, Contact details and Notes if there are special instructions to be given to the team (such as timing, level of archival, etc.)

Click Check Out Web Order from BOTTOM RIGHT

Check Out Web Order

IMPORTANT NOTE

- ✓ While doing the Data Entry always follow the below sequence to enter data:
 - Account Code (it's mandatory to enter all 3 codes when available)
 - Container Barcode
 - File Barcode (if on file level)
 - Short Description

- ✓ Remaining fields are optional and can be used as per your business requirements

- ✓ If you are doing the data entry, then all requests need to be placed on the container/box level and not the file level

- ✓ If you have previously entered your boxes or files through the online portal, then you will only need to search for those items from the Advanced Search section using "CURRENT STATUS = PENDING"

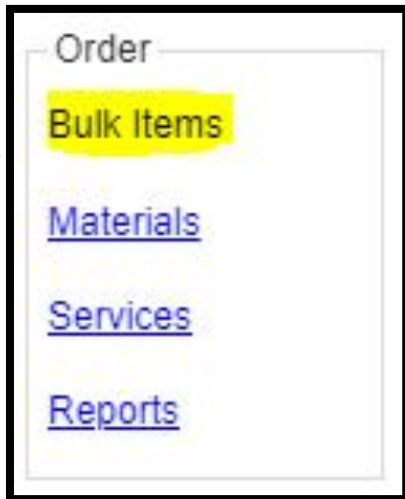
- ✓ The status of these files or boxes will always show in the PENDING status

COLLECTION with IRON MOUNTAIN – DATA ENTRY *and* PACKING

- ❑ Your first step would be to do the data entry on the online portal for the new boxes and files that you intend to request for collection. You will first add the new Container and then you will add the new files to that container one by one.

Directions (CONTAINER)

Bulk Items > Service Type >
Quantity > ADD to Cart



*NOTE:

- In the Comments field please include the type of files (Box files or Flat files), the approximate number of boxes required (if on file level), and whether Packing or Inventory are required
- You do not have the option for a bulk upload of all your boxes and files into the online portal.

RETRIEVAL REQUEST

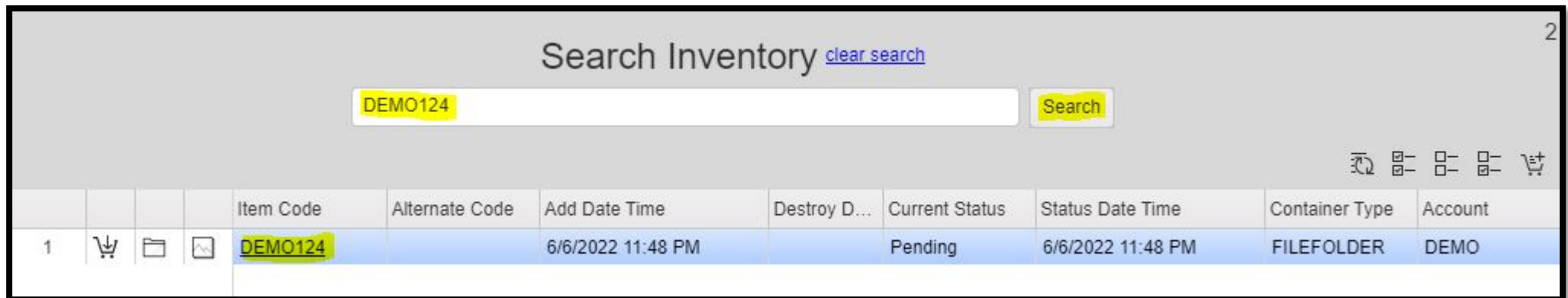
This request would be placed whenever you would like to retrieve (get back) boxes or files that are already stored with InfoFort as a part of your inventory.

There are 2 options available to filter the search of items to be retrieved:

❑ **Option 1 : Search by barcode:**

If you have the item barcode available, search box at the top of the page to search you item.

Type the barcode from the search inventory box then click on search

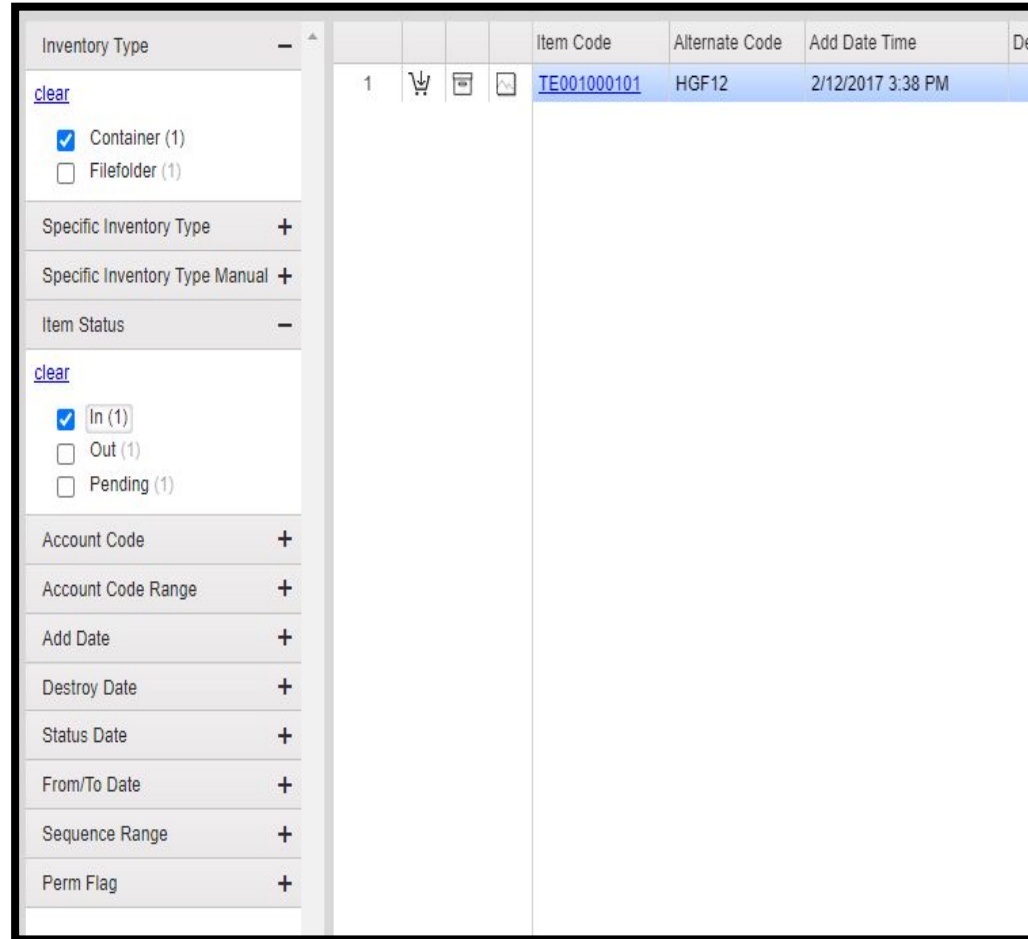


The screenshot shows a web interface for searching inventory. At the top, there is a search bar with the text "DEMO124" and a "Search" button. Below the search bar is a table with the following columns: Item Code, Alternate Code, Add Date Time, Destroy D..., Current Status, Status Date Time, Container Type, and Account. The first row of the table is highlighted in blue and contains the following data: 1, DEMO124, 6/6/2022 11:48 PM, Pending, 6/6/2022 11:48 PM, FILEFOLDER, DEMO.

			Item Code	Alternate Code	Add Date Time	Destroy D...	Current Status	Status Date Time	Container Type	Account
1			DEMO124		6/6/2022 11:48 PM		Pending	6/6/2022 11:48 PM	FILEFOLDER	DEMO

 **Option 2 : Filter Request:**

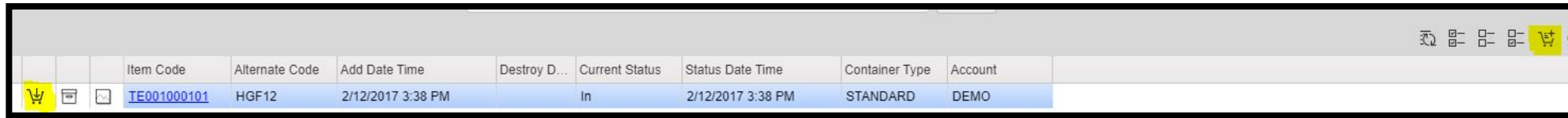
You may use the filter options available on the left side of the page.



The screenshot displays a web application interface for inventory management. On the left side, there is a sidebar with various filter options, each with a plus sign to expand it. The 'Inventory Type' filter is expanded, showing 'Container (1)' selected and 'Filefolder (1)' unselected. Below it, 'Specific Inventory Type' and 'Specific Inventory Type Manual' are also expanded. The 'Item Status' filter is expanded, showing 'In (1)' selected, 'Out (1)' unselected, and 'Pending (1)' unselected. Other filters include 'Account Code', 'Account Code Range', 'Add Date', 'Destroy Date', 'Status Date', 'From/To Date', 'Sequence Range', and 'Perm Flag'. On the right side, there is a table with the following columns: 'Item Code', 'Alternate Code', 'Add Date Time', and 'De'. The table contains one row with the following data: '1', 'TE001000101', 'HGF12', and '2/12/2017 3:38 PM'. The table also has icons for 'add', 'edit', and 'delete' next to the first column.

	Item Code	Alternate Code	Add Date Time	De
1	TE001000101	HGF12	2/12/2017 3:38 PM	

Once you complete your search and you have the result on the search result grid, you can click Add to Cart (either on the top right or left side of the line of the item) to add the items to the cart.



Item Code	Alternate Code	Add Date Time	Destroy D...	Current Status	Status Date Time	Container Type	Account
TE001000101	HGF12	2/12/2017 3:38 PM		In	2/12/2017 3:38 PM	STANDARD	DEMO

Go to cart (top right) > Select the request > Check out Web order



Fill account codes, contact and address details

Check Out Web Order

Requests in this order 2

Account

DEMO \ \ \

Address

Contact Jefferson

Address

Phone

Fax

Choose Address

Use Default Delivery Address

Notes

Place Web Order Cancel

Service Priority (SHUTTLE DELIVERY/COLLECT)

Service Priority

Requested Fulfillment

Action

Options Search Format

	Action Code	Action Description	Service Type
1	AFTER H...	After business hours	After business hours
2	BOX COL...	Pickup/Collection Service	Pickup/Collection Servi
3	CONSUM...	Supply of consumables	Supply of consumables
4	DIB INT C...	DWC Internal Delivery	DWC Internal Delivery
5	DIB URG...	DIB urgent File delivery	DIB urgent File delivery
6	NEXT DAY	Next day 24 hour	Next day 24 hour
7	SAME DAY	Same day delivery service	Same day delivery serv
8	SHREDDI...	Shredding services	Shredding services
9	URGENT	Urgent delivery service	Urgent delivery service

1

IMPORTANT NOTE

The status of these files or boxes will always show in the IN status.

REFILE REQUEST

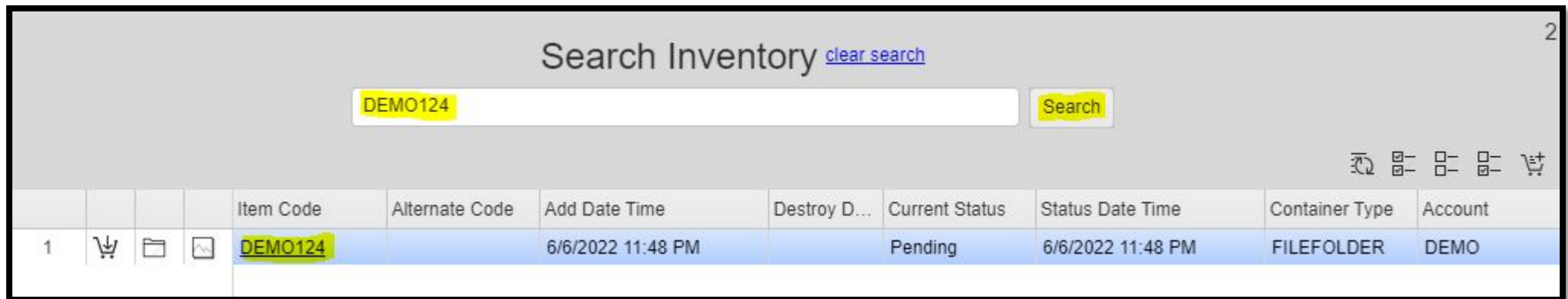
This request would be placed whenever you would like to refile (send back) boxes or files that were previously retrieved

There are 2 options available to filter the search of items to be refile:

❑ **Option 1 : Search by barcode:**

If you have the item barcode available, search box at the top of the page to search you item.

Type the barcode from the search inventory box then click on search

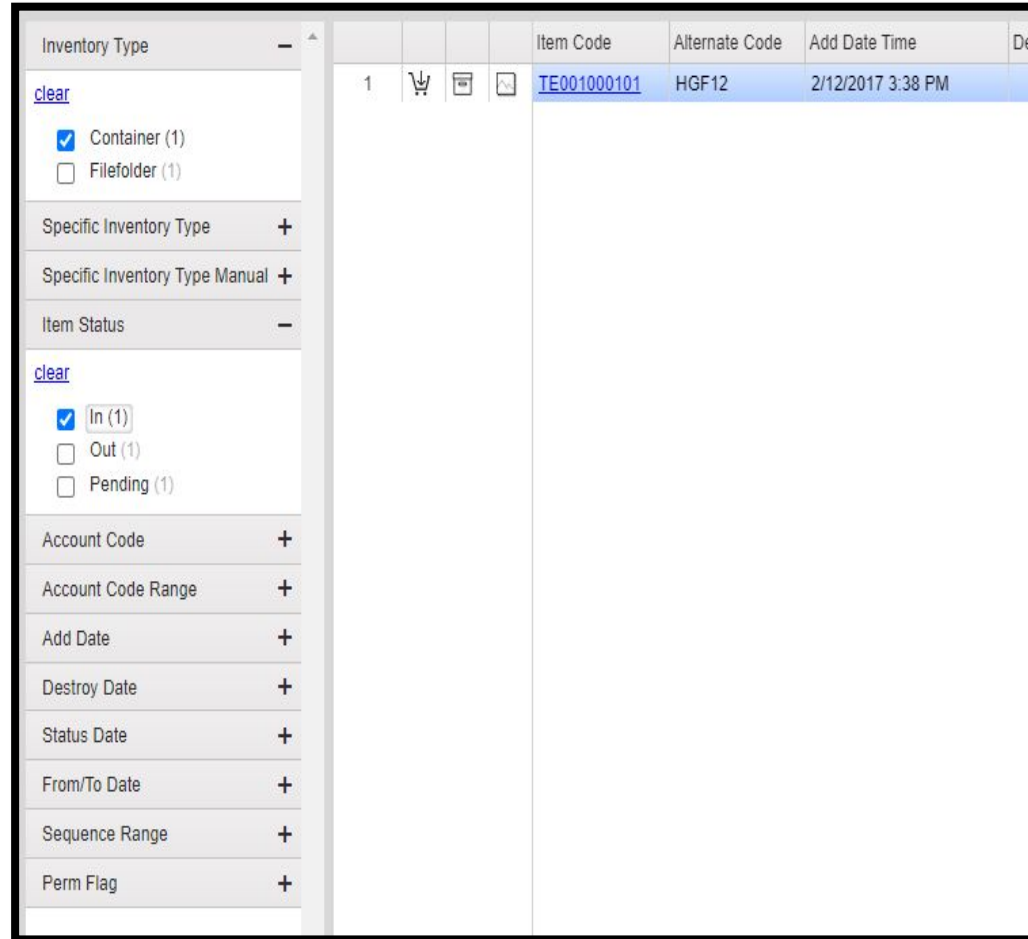


The screenshot shows a web interface for searching inventory. At the top, there is a search bar with the text "Search Inventory" and a "clear search" link. Below the search bar, the text "DEMO124" is entered, and a yellow "Search" button is visible. To the right of the search bar, there are icons for refresh, list view, grid view, and a shopping cart. Below the search bar is a table with the following columns: Item Code, Alternate Code, Add Date Time, Destroy D..., Current Status, Status Date Time, Container Type, and Account. The table contains one row with the following data: Item Code: DEMO124, Add Date Time: 6/6/2022 11:48 PM, Current Status: Pending, Status Date Time: 6/6/2022 11:48 PM, Container Type: FILEFOLDER, Account: DEMO. The "DEMO124" text in the table is highlighted in yellow.

				Item Code	Alternate Code	Add Date Time	Destroy D...	Current Status	Status Date Time	Container Type	Account
1				DEMO124		6/6/2022 11:48 PM		Pending	6/6/2022 11:48 PM	FILEFOLDER	DEMO

 **Option 2 : Filter Request:**

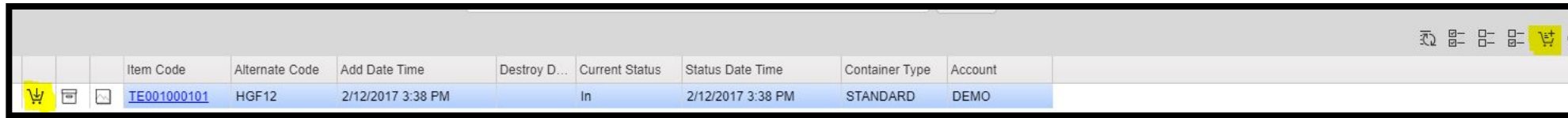
You may use the filter options available on the left side of the page.



The screenshot displays a web-based inventory management interface. On the left side, there is a sidebar with various filter options, each with a plus sign to expand it. The 'Inventory Type' filter is expanded, showing 'Container (1)' selected and 'Filefolder (1)' unselected. Below it, 'Specific Inventory Type' and 'Specific Inventory Type Manual' are also expanded. The 'Item Status' filter is expanded, showing 'In (1)' selected, 'Out (1)' unselected, and 'Pending (1)' unselected. Other filters include 'Account Code', 'Account Code Range', 'Add Date', 'Destroy Date', 'Status Date', 'From/To Date', 'Sequence Range', and 'Perm Flag'. On the right side, a table displays inventory items. The table has columns for 'Item Code', 'Alternate Code', and 'Add Date Time'. A single row is visible with the following data: Item Code: TE001000101, Alternate Code: HGF12, Add Date Time: 2/12/2017 3:38 PM. The row is highlighted in blue. Above the table, there are icons for a shopping cart, a trash can, and a refresh button.

	Item Code	Alternate Code	Add Date Time	De
1	TE001000101	HGF12	2/12/2017 3:38 PM	

Once you complete your search and you have the result on the search result grid, you can click Add to Cart (either on the top right or left side of the line of the item) to add the items to the cart.



Item Code	Alternate Code	Add Date Time	Destroy D...	Current Status	Status Date Time	Container Type	Account
TE001000101	HGF12	2/12/2017 3:38 PM		In	2/12/2017 3:38 PM	STANDARD	DEMO

Go to cart (top right) > Select the request > Check out Web order



Fill account codes, contact and address details

Check Out Web Order

Requests in this order 2

Account

DEMO \ \ \

Address

Contact Jefferson

Address

Phone

Fax

Choose Address

Use Default Delivery Address

Notes

Place Web Order Cancel

Service Priority (SHUTTLE DELIVERY/COLLECT)

Service Priority

Requested Fulfillment

Action

Options Search Format

	Action Code	Action Description	Service Type
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1

IMPORTANT NOTE

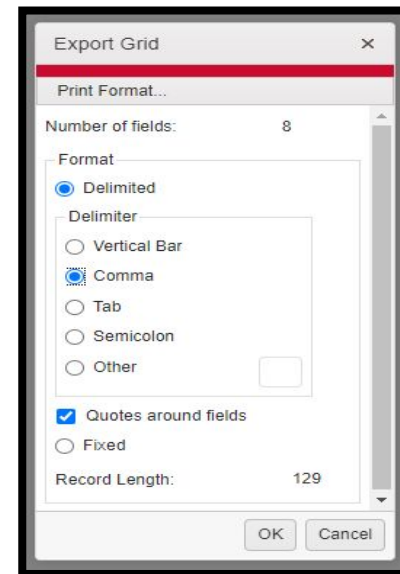
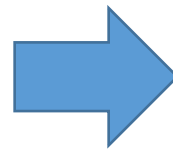
The status of these files or boxes will always show in the OUT status.

DATA EXPORT

There are 2 options available to filter the search of items to be refile:

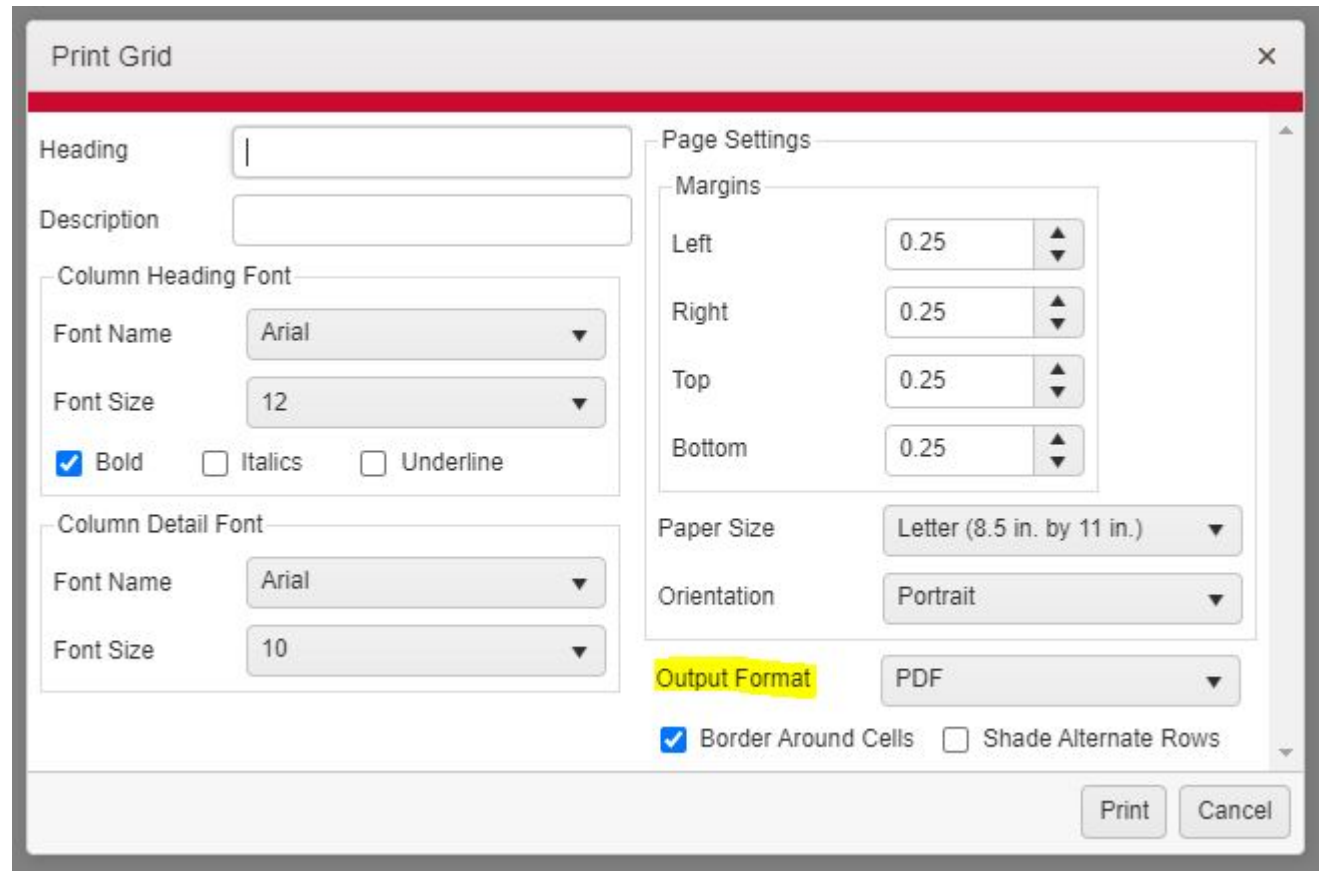
❑ **Option 1:**

- Search for the items on the grid > Options > Export Grid > Choose the below highlighted options > Click OK
- Once the status is completed > Click Close
- File will be downloaded which you can open using any text editor.



☐ **Option 2 : Filter Request:**

- Search your items on the grid > Options > Print Grid
- Select output format as Excel > Click Print

A screenshot of the 'Print Grid' dialog box. The dialog has a title bar with 'Print Grid' and a close button. It contains several sections: 'Heading' and 'Description' text boxes; 'Column Heading Font' section with 'Font Name' (Arial) and 'Font Size' (12) dropdowns, and checkboxes for 'Bold' (checked), 'Italics', and 'Underline'; 'Column Detail Font' section with 'Font Name' (Arial) and 'Font Size' (10) dropdowns; 'Page Settings' section with 'Margins' (Left, Right, Top, Bottom) spinners set to 0.25, 'Paper Size' (Letter (8.5 in. by 11 in.)) and 'Orientation' (Portrait) dropdowns; and 'Output Format' dropdown set to 'PDF'. At the bottom, there are checkboxes for 'Border Around Cells' (checked) and 'Shade Alternate Rows'. 'Print' and 'Cancel' buttons are at the bottom right.



For further assistance please don't
hesitate to contact your Customer Care
team or your Account Manager

