



Retrieving Records

IRON MOUNTAIN CONNECT™ RECORDS MANAGEMENT



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Overview: Retrieving Records Stored at Iron Mountain

After you have searched for and located records that are stored at Iron Mountain, you will create a retrieval order for one or more records to be delivered to you from storage.

The retrieval order wizard will step you through the process of requesting items, entering delivery information and finalizing the order.

Use this guide to learn how to:

- Enter a retrieval order
- Retrieve unlisted files
- Retrieve unlisted open shelf files
- Add large quantities of records to the cart and remove large quantities of records from the cart

Retrieving Stored Records

The screenshot shows the Iron Mountain Connect interface. At the top, the logo and navigation links are visible: "IRON MOUNTAIN CONNECT", "RECORDS MANAGEMENT", "Welcome rc2jen", "USA", "SUPPORT", and "LOG OUT". The main search area includes a search bar with "DIST CTR" entered, a "Search Tools" dropdown, and a "Search R" button. Below the search bar are filter sections for "Record Type" (All, Boxes, Files), "Customer" (RC2M2 [RC2M2]), "Department" (All), "Status" (All), and "File Group" (Select). A "Search" button and a refresh icon are at the bottom of the filter section. On the left, a navigation sidebar lists: "Search, Retrieve" (highlighted), "Pickups, Add Records", "Bulk Upload", "Order Supplies", "Administration", and "Track Orders". At the top right, there are "Help", "Retrievals (8)", "Reset View", and "Export" options. Two callout boxes provide instructions: Callout 1 points to the "Search, Retrieve" menu item, and Callout 2 points to the search bar and filter sections.

2 Enter a Keyword and set additional filters as necessary. Refer to the [Searching](#) training guide for more detailed information on using Search functionality.

1 Select Search, Retrieve.
Use the left-side navigation bar to move within the different functional areas in Iron Mountain Connect Records Management.

Retrieving Stored Records

IRON MOUNTAIN CONNECT

RECORDS MANAGEMENT

Welcome rc2jen USA SUPPORT LOG OUT

Search Search Tools 306 Search Results

DIST CTR

Record Type
 All Boxes Files

Customer
 RC2M2 [RC2M2]

Department
 All

Status
 All

File Group
 Select

Search

Request Unlisted Open Shelf File

4 Click the Retrievals button to open the retrieval order wizard, which steps you through the order process.

3 Select an item, then click Add to Cart. The number of items in your cart is incremented.

Item Type	Customer	Division	Department	SKP Barcode	Alpha From	Customer Box Num...	Status	Action
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled					At Iron Mountain	Filter Add to Cart Action
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647104		108647104	At Iron Mountain	Add to Cart Action
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647109		108647109	At Iron Mountain	Add to Cart Action
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647112		108647112	At Iron Mountain	Add to Cart Action
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647113		108647113	At Iron Mountain	Add to Cart Action
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647120		108647120	At Iron Mountain	Add to Cart Action
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647124		108647124	At Iron Mountain	Add to Cart Action
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647125		108647125	At Iron Mountain	Add to Cart Action

Retrievals (8)

Reset View Export

Search, Retrieve

Pickups, Add Records

Bulk Upload

Order Supplies

Administration

Track Orders

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IRON MOUNTAIN

Retrieving Stored Records

IRON MOUNTAIN CONNECT

RECORDS MANAGEMENT

Welcome rc2jen USA SUPPORT LOG OUT

Search Search Tools 306 Search Results Help Retrievals (10)

DIST CTR

Record Type: All Boxes Files

Customer: RC2M2 [RC2M2]

Department: All

Status: All

File Group: Select

Search

Action: Request Unlisted Open Shelf File

Item Type	Customer	Division	Department	SKP Barcode	Alpha From	Customer Box Num...	Status	Action
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647102		108647102	At Iron Mountain	Filter Add to Cart Action
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647103		108647103	At Iron Mountain	Add to Cart Action
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647112		108647112	At Iron Mountain	Remove Add to Cart Action
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647124		108647124	At Iron Mountain	Remove Add to Cart Action
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647125		108647125	At Iron Mountain	Add to Cart Action

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IRON MOUNTAIN

Entries displayed in blue are clickable links. Click on the link to view the details.

Remove records from your cart easily.

Page through your search results.

Change the number of records displayed on the screen.

Retrieving Stored Records

5 Review the items on your order.

6 If required, select the division and/or department that will be billed for this order. Associated instructions display.

7 If this customer uses purchase orders to assign and track expenses, look up and assign an active purchase order.

8 Choose your retrieval method.

9 Click Next to move to the Retrieval Details step in the order wizard and enter shipping information.

IRON MOUNTAIN CONNECT

RECORDS MANAGEMENT

Cart

>Retrievals (4)

>Supplies (0)

>Pickups (0)

Cart: (4) Items

Retrieval Details

Welcome rc2jen USA SUPPORT LOG OUT

Review retrieval order items and specify internal billing information. Update order as necessary.

Select All Deselect All Empty Cart

Add More Records Next >

Customer: ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE] Line Items (2)

*Bill To Department: DEPT A [ACCOUNTING DEPARTMENT] Apply Chargeback: MedRcd38 Apply to All

Instructions: ONLY DEL/PU BETWEEN 9:30-11:30AM & 2:30-5PM *PO Number: 38-339-2015

At Iron Mountain

Remove More >>

Retrieval Method

Checkout

Remove More >>

Customer: RC2M8 [RC2M8] Line Items (2)

Instructions: RC2M8 Apply Chargeback: Apply to All

*PO Number:

At Iron Mountain

Chargeback Item Instructions

Retrieval Method

Checkout

Remove More >>

At Iron Mountain

Chargeback Item Instructions

Retrieval Method

Remove More >>

Search, Retrieve

Pickups, Add Records

Bulk Upload

Order Supplies

Administration

Track Orders

12100013

Requested for Stackhouse,Jen Change User

12100014

Requested for

100%

Retrieving Stored Records

The screenshot displays the IRON MOUNTAIN CONNECT interface. At the top, the navigation bar includes the logo, 'Welcome rc2jen USA', and links for 'SUPPORT' and 'LOG OUT'. A sidebar on the left contains menu items: 'Cart', '>Retrievals (4)', '>Supplies (0)', and '>Pickups (0)'. The main content area is titled 'RECORDS MANAGEMENT' and features a 'Retrieval Details' section. This section includes a header with 'Review retrieval order items. Specify internal billing information. Update order as necessary.' and buttons for 'Select All', 'Deselect All', and 'Empty Cart'. Below this, there are two order summary cards. The first card is for 'Customer: ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]' and includes fields for 'Bill To Department' (DEPT A [ACCOUNTING DEPARTMENT]), 'Apply Chargeback' (MedRcrd38), 'Instructions' (ONLY DEL/PU BETWEEN 9:30-11:30AM & 2:30-5PM), and '*PO Number' (38-339-2015). It lists two items: 'asfads' and 'Description TWO', each with a 'Requested for' field (Stackhouse, Jen) and a 'Retrieval Method' dropdown (Checkout). The second card is for 'Customer: RC2M8 [RC2M8]' and includes 'Instructions: RC2M8', 'Apply Chargeback', and '*PO Number' fields. It lists two items: '12100013' and '12100014', each with a 'Requested for' field and a 'Retrieval Method' dropdown. A bottom sidebar contains navigation options: 'Search, Retrieve', 'Pickups, Add Records', 'Bulk Upload', 'Order Supplies', 'Administration', and 'Track Orders'. The bottom right corner shows a search icon and '100%' zoom level.

Empty the cart and restart the retrieval process.

Return to the Search Results screen and add additional boxes/files to your order.

Enter any instructions that are specific to this order item.

Retrieving Stored Records

IRON MOUNTAIN® CONNECT

Welcome rc2jen USA SUPPORT LOG OUT

10 Verify the delivery address and edit the delivery contact as necessary. Click the >Change Address link to select or create a new address.

11 Verify your shipping priority and carrier.

12 Finalize your order. Your records will be delivered as specified in your order instructions and a confirmation will be emailed.

< Back to Cart Add More Records Place Your Order

Delivery Address

JSRC2

First Avenue

Suite 211

Address Line 3

Floor: 2

GLEN RIDDLE, PA 19037

USA

> Change Address

Delivery Contact

James Day

2156354482

> Use My Contact Information

One or more items below will be delivered by third party carrier

Shipping Priority

Next Day 10/12/2015 5:00 PM EDT

Scheduled by 5:00 PM on

Carrier

Iron Mountain

Customer Pickup

Third Party

Email Confirmation(s) Primary

jennifer.stackhouse@ironmour

Additional Email

Additional Email

Order Instructions

Enter text

60 characters remaining

> Add International Address

1 A message displays if any of the items on the order will be delivered by a third party carrier.

1 Enter the email address of user(s) who will receive the order confirmation. The primary contact receives all order-related emails. Non-primary contacts receive confirmation emails only.

1 Enter any instructions that are specific to this overall order.

100%

Retrieving Stored Records

IRON MOUNTAIN CONNECT | Welcome rc2jen USA | SUPPORT | LOG OUT

RECORDS MANAGEMENT

Cart | >Retrievals (0) | >Supplies (0) | >Pickups (0)

Retrieval Details | [Order Complete](#)

Thank you! Your order has been submitted.
An email confirmation will be sent to jennifer.stackhouse@ironmountain.com

[< Start a New Retrieval Order](#)

Delivery Address: First Avenue, Suite 211, Floor: 2, GLEN RIDdle PA., 19037
Contact Name & Phone: Jan & 2156354482
Carrier: Iron
Priority: 10/12/2

Order Number	Order Type	Record Count	Action
155526023	Retrieval	(2) Boxes	View Order
FOR RC CALC PROJ DO NOT CHANGE]			
155526021	Retrieval	(2) Files	View Order
155526021	Retrieval	(1) Box	View Order

RC2M2 [RC2M2]

RC2M8 [RC2M8]

Search, Retrieve | Pickups, Add Records | Bulk Upload | Order Supplies | Administration | Track Orders

100%

The user(s) who will receive email confirmation for this order.

Return to the Search Results screen to retrieve additional records.

Entries displayed in blue are clickable links. Click the Order Number to track the order you just completed.

View order details.

Requesting Unlisted Files

IRON MOUNTAIN CONNECT

RECORDS MANAGEMENT

Welcome rc2jen USA SUPPORT LOG OUT

Search Search Tools 306 Search Results Help Retrievals (3)

DIST CTR

Record Type
 All Boxes Files

Customer
 RC2M2 [RC2M2]

Department
 All

Status
 All

File Group
 Select

Search

Action Request Unlisted Open Shelf File

Item Type	Customer	Division	De	Status	Action
<input type="checkbox"/> BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	At Iron Mountain	Filter Remove Action
<input type="checkbox"/> BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	At Iron Mountain	Add to Cart Action
<input type="checkbox"/> BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	Iron Mountain	Add to Cart Action
<input type="checkbox"/> BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	Iron Mountain	Add to Cart Action
<input type="checkbox"/> BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	At Iron Mountain	Add to Cart Action
<input type="checkbox"/> BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	Iron Mountain	View Details Edit Request Unlisted File Action
<input checked="" type="checkbox"/> BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	At Iron Mountain	Remove Action
<input type="checkbox"/> BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	At Iron Mountain	Add to Cart

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IRON MOUNTAIN

1 An unlisted file is a file that is stored in a box and does not yet have an associated file record.

2 Follow steps 1 and 2 in the [Retrieving Stored Records](#) section.

Select Request Unlisted File from the Action dropdown of the box you need Iron Mountain to retrieve a file/files from.

Requesting Unlisted Files

3 Enter descriptive information that will help Iron Mountain locate the file.

4 Click Save to List. You are able to enter multiple requests for different files in the box.

5 Click Add to Cart. Your unlisted file request is added to the cart.

i Edit and remove requests. For additional information on IOD and XOD requests, refer to the Requesting an IOD

The screenshot shows the Iron Mountain Records Management interface. The top navigation bar includes 'Welcome rc2jen', 'USA', 'SUPPORT', and 'LOG OUT'. The main content area is titled 'Request Unlisted Files' and contains a form for entering file information. The form has two text boxes for 'File Description 1' and 'File Description 2'. Below the form is a table with the following data:

File Description 1	File Description 2	Action
Michael Sommers 02/12/2003	Left Tibula fracture xray 07	Action
Michael Sommers 02/12/2003	Left Tibula fracture xray 02	Action

The 'Action' dropdown menu is open, showing options: Edit, Remove, Request IOD, and Request XOD. Below the table is an 'Add to Cart' button and a 'Cancel' button. The bottom of the screen shows a footer with 'Page 1 of 500' and 'Per Page: 10'.

Requesting Unlisted Files

IRON MOUNTAIN CONNECT

Welcome rc2tom USA SUPPORT LOG OUT

RECORDS MANAGEMENT

Search Search Tools 5,000 Results of 71,473 Help Retrievals (3) Reset View Export

Request Unlisted Open Shelf File

Your search results returned 71,473 records, which exceed the limit of 1000 records. Please refine your search criteria in the grid below.

6 Continue with steps 5 -13 from the [Retrieving Stored Records](#) section to process the retrieval order containing the unlisted file request. Each request displays as a line item on the order.

i Your unlisted file request displays. Click the link to view, edit or remove the request.

Item Type	SKP Barcode	Customer	Department	Division	Location	Action
BOX	12023	JSRC2 [SRVC CF_BC=B,RMT=5]	LAW [DIVISION ONE, LAW FORMAT]	DIVONE [DIVISION ONE]	At Iron Mountain	Add to Cart Action
BOX	12024	JSRC2 [SRVC CF_BC=B,RMT=5]	LAW [DIVISION ONE, LAW FORMAT]	DIVONE [DIVISION ONE]	At Iron Mountain	Remove Action
BOX	12025	JSRC2 [SRVC CF_BC=B,RMT=5]	MASTER DEPARTMENT	DIVISION	At Iron Mountain	Add to Cart Action
BOX	12026	JSRC2 [SRVC CF_BC=B,RMT=5]	LAW [DIVISION ONE, LAW FORMAT]	DIVONE [DIVISION ONE]	At Iron Mountain	Add to Cart Action
BOX	12028	JSRC2 [SRVC CF_BC=B,RMT=5]	LAW [DIVISION ONE, LAW FORMAT]	DIVONE [DIVISION ONE]	At Iron Mountain	Add to Cart Action

Search, Retrieve

Pickups, Add Records

Bulk Upload

Order Supplies

Administration

Track Orders

Page 1 of 500 Per Page: 10

Displaying 1 - 10 of 5000 100%

Requesting Unlisted Open Shelf Files

IRON MOUNTAIN RECORDS MANAGEMENT

Welcome rc2jen USA SUPPORT LOG OUT

Retrievals (7)

Search

Record Type: All Boxes Files

Customer: ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]

Dept Custom: All

Status: All

File Group: Select

Search

Action: Request Unlisted Open Shelf File

Your search results return records, which exceeds the 5,000 record limit.

Table Headers: Item, SKP Barcode, Alpha From, Customer Box Num..., Status, Action

Item	SKP Barcode	Alpha From	Customer Box Num...	Status	Action
FILE	20020020003-173	FROM5	ABCD113	At Iron Mountain	Filter, Add to Cart, Action
FILE	20020020003-180		ABCD113	At Iron Mountain	Add to Cart, Action
FILE	20020020003-181		ABCD113	At Iron Mountain	Add to Cart, Action
FILE	20020020003-198		ABCD113	At Iron Mountain	Add to Cart, Action
FILE	20020020003-193		ABCD113	At Iron Mountain	Add to Cart, Action
FILE	20020020003-185		ABCD113	At Iron Mountain	Add to Cart, Action
FILE	20020020003-194		ABCD113	At Iron Mountain	Add to Cart, Action

Page 1 of 500 Per Page: 10

Displaying 1 - 10 of 5000

1 Follow steps 1 and 2 in the [Retrieving Stored Records](#) section.

2 Select Request Unlisted Open Shelf File.

i An unlisted open shelf file is a file that is stored on a shelf and does not yet have an associated file record.

Requesting Unlisted Open Shelf Files

3 Select a Customer.

4 Select one or more File Groups.

5 Click Save to List. You are able to enter multiple requests for different files in the box.

6 Enter descriptive information that will help Iron Mountain locate the file. Note that File Description 1 defaults from the Keyword field in your search.

7 Click Add to Cart. Your unlisted open shelf file request is added to the cart.

i Edit and remove requests.

Request Unlisted Open Shelf File

Request an unlisted file that is stored at Iron Mountain. Enter identifying information to locate the unlisted file, then click Save to List. Once saved, use the edit and delete buttons to modify the request.

*Customer (lock)
ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]

*File Group (multiple selections allowed) (lock)
STD GROUP, OTHERS

Save to List

File Description 1
Medical

*File Description 2 (lock)
Bob Stevers mri 2013

(2) Unlisted File Request

Customer	File Group	File Description 1	File Description 2	Action
ABC	OTHERS	Medical	Bob Stevers cat scan 2013	
ABC	STD GROUP	Medical	Bob Stevers x-ray 2013	

Add to Cart Cancel

Order Supplies
Administration
Track Orders

Page 1 of 8 Per Page: 10

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Change zoom level

Requesting Unlisted Open Shelf Files

8

Continue with steps 5 -13 in the [Retrieving Stored Records](#) section to process the retrieval order containing the unlisted open shelf file request. Each request displays as a line item on the order.

i

Each unlisted open shelf file request displays as a separate line item in the Items step of the retrieval order wizard. Click the link to view, edit or remove the request.

Cart

Help

>Retrievals (4)

>Supplies (0)

>Pickups (0)

*Bill To Department: DEPT D [MEDICAL DEPARTMENT]

Apply Chargeback: MEDREC

Instructions:

*PO Number: AR-102015-238

 * Medical

Unlisted Open Shelf File Requested from STD GROUP

Remove

Requested for
Stackhouse,Jen [Change User](#)

Chargeback

Item Instructions

Retrieval Method

MEDREC

Checkout

[Edit/Review Unlisted Open Shelf File Request](#) * Medical

Unlisted Open Shelf File Requested from OTHERS

Remove

More >>

Requested for
Stackhouse,Jen [Change User](#)

Chargeback

Item Instructions

Retrieval Method

MEDREC

Checkout

[Edit/Review Unlisted Open Shelf File Request](#) * Medical

Unlisted Open Shelf File Requested from OTHERS

Remove

More >>

Requested for
Stackhouse,Jen [Change User](#)

Chargeback

Item Instructions

Retrieval Method

MEDREC

Checkout

[Edit/Review Unlisted Open Shelf File Request](#) * Medical

Unlisted Open Shelf File Requested from STD GROUP

Remove

More >>

Requested for
Stackhouse,Jen [Change User](#)

Chargeback

Item Instructions

Retrieval Method

MEDREC

Checkout

[Edit/Review Unlisted Open Shelf File Request](#)

Search, Retrieve

Pickups, Add Records

Bulk Upload

Order Supplies

Administration

Track Orders

Adding and Removing Large Quantities (Bulk Actions)

5,000 Results of 71,473

Retrievals (1)

Select Request Unlisted File(s) to quickly request multiple unlisted files. Refer to Requesting Unlisted Files for more information.

Click the Select All checkbox (located at the top of the column of checkboxes) to select all records currently displayed on screen.

- Add to Cart
- Remove from Cart
- Request Unlisted File(s)
- Request IOD
- Request XOD
- Multi-Item Edit

Select Add to Cart or Remove from Cart to add and remove quantities of records to and from the cart with a single click. This action will be applied to ALL selected records.

Select multiple records. The Action dropdown above the results list becomes active.

Customer Box Number	Action
Type here then click filter	Filter
<input type="checkbox"/> JSRC2 [SRVC CF,BC=B,RMT=5] LAW [DIVISION ONE, LAW FORMAT] At Iron Mountain DIVONE [DIVISION ONE] 12021	Add to Cart Action
<input type="checkbox"/> JSRC2 [SRVC CF,BC=B,RMT=5] LAW [DIVISION ONE, LAW FORMAT] At Iron Mountain DIVONE [DIVISION ONE] 12022	Add to Cart Action
<input checked="" type="checkbox"/> BOX 12023 JSRC2 [SRVC CF,BC=B,RMT=5] LAW [DIVISION ONE, LAW FORMAT] At Iron Mountain DIVONE [DIVISION ONE] 12023	Add to Cart Action
<input checked="" type="checkbox"/> BOX 12024 JSRC2 [SRVC CF,BC=B,RMT=5] LAW [DIVISION ONE, LAW FORMAT] At Iron Mountain DIVONE [DIVISION ONE] 12024	Remove Action
<input checked="" type="checkbox"/> BOX 12025 JSRC2 [SRVC CF,BC=B,RMT=5] MASTER DEPARTMENT At Iron Mountain MASTER DIVISION 12025	Add to Cart Action
<input checked="" type="checkbox"/> BOX 12026 JSRC2 [SRVC CF,BC=B,RMT=5] LAW [DIVISION ONE, LAW FORMAT] At Iron Mountain DIVONE [DIVISION ONE] 12026	Add to Cart