



Site Validation

**IRON MOUNTAIN CONNECT™
RECORDS MANAGEMENT**



Site Validation

Iron Mountain Site Validation enables organizations to select the specific boxes on a pickup order and communicate them in advance to Iron Mountain. Iron Mountain validates pickup, creating a traceable chain of custody.

Site Validation results in fewer inventory discrepancies, superior inventory control and a secure, dependable, documented chain of custody.

Depending on how Iron Mountain Connect Records Management is set up, users may be forced to complete missing, required metadata on returning boxes as part of the process.

Use this guide to learn how to:

- Place a pickup order with Site Validation
- Sort the pickup list by customer
- Enter a file-only and/or vault pickup services request with Site Validation

Site Validation Pickup List

1 Select Pickups, Add Records from the Left-Side Navigation bar.

2 Pickup List (Add Records) is the default selection.

3 Create and add new boxes and files to your pickup list, and add returning boxes to your pickup list. For information on creating boxes and files, refer to the Creating a New Box and Creating a New File How To guides.

i If your organization uses the option to enforce metadata completion, you will be required to fill in missing metadata on boxes that you are returning to Iron Mountain (refile).

i To place vault pickup service requests and/or file-only orders, select a customer and click on the cart, then place these orders from within the Pickup Order Cart Items screen as described on page 5.

IRON MOUNTAIN CONNECT
RECORDS MANAGEMENT

Welcome rcZjen USA SUPPORT LOG OUT

Pickups, Add Records

Pickup List (Add Records)
Add and edit detailed information for records and select items to Order Cart Items screen.

Add Box Add File Refile Box

Action Select Customer ABC [ABC-FOR RC C

Record Type	SKP Barcode	Customer	Status	Action
BOX	Type here then click fil	Type h	All	Filter
New Box		ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]	Customer Not Division Enabled	DC10 [DAWN'S DEPARTMENT 10]
New Box		ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]	Customer Not Division Enabled	
New Box		ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]	Customer Not Division Enabled	
Existing Box	20020020006	ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]	Customer Not Division Enabled	DEPARTMENT]
New File	20020020006	ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]	Customer Not Division Enabled	DEPT D [MEDICAL DEPARTMENT] C04 Personal Policy At Iron Mountain

Search, Retrieve

Pickups, Add Records

Order Supplies

Administration

Track Orders

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100%

Site Validation Pickup List

The screenshot shows the Iron Mountain website interface for managing pickup lists. The top navigation bar includes the Iron Mountain logo, 'RECORDS MANAGEMENT', and user information like 'Welcome rcZjen', 'USA', 'SUPPORT', and 'LOG OUT'. A 'Pickups (1)' cart icon is visible in the top right. The main content area is titled 'Order Cart Items screen.' and features a table with columns for Record Type, SKP Barcode, Customer, and Action. The table lists several items, including 'New Box' and 'Existing Box' entries. Callouts provide instructions on how to interact with the interface: selecting a customer, adding items to the cart, and exporting the list.

4 Site validation requires that you select a single customer. You must select a customer to enable the cart and the Action dropdowns.

7 Click the Pickups cart.

6 Click Export to export a copy of your pickup list to a .csv file. This copy is part of the chain of custody for these boxes.

5 Add the boxes to the pickup cart. When you place the pickup order, a report listing these boxes is sent to Iron Mountain as an inventory control.

i Use the multi-select functionality to add multiple boxes to the cart quickly.

i Use the Customer dropdown to sort the pickup list. Only items belonging to that customer display on the pickup list.

Record Type	SKP Barcode	Customer	Action
BOX	Type here then click fi	Type here then click fi	
New Box		ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]	Filter, Remove, Action
New Box		ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]	Add to Cart, Action
New Box		ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]	Add to Cart, Action
Existing Box	20020020	ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]	Action
New File	200200	ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]	Action

Site Validation Pickup Order Cart

The screenshot shows a web application interface for a pickup order cart. The top navigation bar includes a logo, user information (Welcome rc2jen), location (USA), and links for SUPPORT and LOG OUT. The main content area displays a cart with 2 items. Callouts 1-11 provide instructions for navigating the cart and adding items. Callout 8 points to a section for specifying internal billing information. Callout 9 points to a list of boxes with checkboxes and purchase order numbers. Callout 10 points to a section for file and vault pickup service requests. A sidebar on the left contains navigation links: Search, Retrieve; Pickups, Add Records; Order Supplies; Administration; and Track Orders.

1 Empty the cart and restart the order process.

2 Return to the pickup list and add additional items to the order.

3 Click Next to move to the Pickup Details screen and enter shipping information.

4 Review your order and specify the Bill to Division and/or Department.

5 If this customer uses purchase order numbers to assign and track expenses, look up and assign an active purchase order number.

6 The boxes you placed on the order are listed.

7 Enter file-only orders and vault pickup service requests:

- For file-only orders, specify the number of new and/or returning files and enter instructions.
- For vault pickup service requests, click the checkbox and enter instructions.

8 File and refile orders and vault pickup service requests display as line items in the Details step of the order wizard.

Site Validation Pickup Order Confirmation

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

13 Verify your shipping priority and carrier.

14 Finalize your order. Your items will be picked up and a confirmation will be emailed.

i The items you placed on the order are listed.

i Enter the email address of user(s) who will receive the order confirmation and enter order instructions specific to the overall order.

Welcome rc2jen USA SUPPORT LOG OUT

IRON MOUNTAIN CONNECT

< Back to Cart Add More Records Place Your Order

Pickup Address
RC2MA [RC2MA]
7 Main Street
Address Line 2
Address Line 3
Floor
MOUNTAIN LAKES, MD 07444
> Change Address

Shipping Priority
 Normal 07/27/2016 5:00:00 PM EDT
 Scheduled by 5:00:00 PM on

Carrier
 Iron Mountain
 Customer Pickup
 Third Party

Email Confirmation(s) Primary
jennifer.stackhouse@ironmou
Additional Email
Additional Email

Order Instructions
Enter text
60 characters remaining
> Add Internal Routing Address

Pickup Contact
RC2MA Contact

Customer: ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE] **Line Items (4)**

Bill To Department: MEDICAL DEPARTMENT **PO Number:** 123

Instructions:

Line	Type	SKP Barcode	Quantity	Description	Item Instructions
1	New Box	--	--		
2	Refile	--	12		
3	New	--	1		

Search, Retrieve
Pickups, Add Records
Order Supplies
Administration
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