User Guide

Iron Mountain Connect™ Records Management

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1   Welcome to Iron Mountain Connect Records Management

Iron Mountain is proud to unveil Iron Mountain Connect Records Management, our new, state-of-the-art records management system that provides secure, easy, quick online access to records, materials and information that is managed through Iron Mountain.

Iron Mountain Connect Records Management was designed from the best features of Record Centre with cutting edge additions and enhancements such as a robust search engine, electronic shopping basket and order wizards that simplify and speed up your work. The baseline functionality and workflows from Records Centre remain, with increased efficiency and ease of use.

1.1   Technical Requirements

Supported Browsers

Iron Mountain Connect Records Management currently supports the following internet browsers:

- Internet Explorer 9
- Internet Explorer 11
- Google Chrome

Suggested Screen Resolution:

For optimal display, set screen resolution to 1366 pixels x 768 pixels.

System Security:

Iron Mountain uses ca Securecenter to control access to Iron Mountain Connect Records Management. This system enforces a variety of security measures including password complexity and expiry policies. Additionally, Iron Mountain Connect Records Management employs three-tier network architecture to ensure customer data is protected by multiple firewalls. As a proactive measure, Iron Mountain routinely performs vulnerability scanning and remediation on all systems in the customer-facing infrastructure. Privileged access to the environment is controlled and reviewed on a quarterly basis.

Iron Mountain Connect Records Management utilises salted SHA encryption for all password data in our user repository. Access to Iron Mountain Connect Records Management is performed exclusively over HTTPS.

1.2   Navigating This Online Help

Welcome to Iron Mountain Connect Records Management online help. Use this help system to find the answers to your questions about Iron Mountain Connect Records Management.

To Open the Help System

On a help screen, click **Table of Contents**.

To Open a Context-sensitive Help Page

Click the **Help** icon 🔵 in the upper right-hand corner of each screen. The appropriate help topic will open.

To View Links and Definitions

To view the definition of an underlined word, simply click on the word.

To View Related Topics

At the bottom of a help page, click **See Also**.

To Find Help Topics

To...	Do this...
View the table of contents	Click **Table of Contents**, and then click a topic to open a lower level or view a help page. To hide an open level, click the drop-down indicator to the left of the topic above it.
Use the index	Click **Index** and type a keyword. The first entry that matches your keyword is highlighted. Click to display the topic.
Search for words or topics	Click **Search**, type the words(s) and click the **Search** button. Select the appropriate help topic from the list.
Perform an advanced search	Click **Search**, use the search operators AND and NOT to create a query and then click the Search button.
View glossary definitions	From within the **Table of Contents** tab, click **Glossary**. Scroll through the entries or use the alphabetical index at the top of the listing to move quickly through entries.

📋 **NOTE:** To return to a previous Help page, click your browser's **Back** ⬅ button.

1.3 Accessing Iron Mountain Connect Records Management

Iron Mountain Connect Records Management (Iron Mountain Connect Records Management) provides secure, easy, quick, online access to records and information stored and managed through Iron Mountain.

Iron Mountain Connect Records Management

To access Iron Mountain Connect Records Management, you must first log in to Iron Mountain Connect. Iron Mountain Connect is the secure gateway that authenticates all users and provides access to Records Management and other Iron Mountain applications. Iron Mountain Connect is also referred to as IM Connect.

1. In your browser, type **www.ironmountainconnect.com** and click **Enter**.

2. On the Login page, enter your username and password.

> 📄 **NOTE:** Iron Mountain will provide your Client User Administrator with a username and password for initial sign on. Contact **Iron Mountain Customer Support** for further assistance as necessary.

3. Click **Log In**. The Iron Mountain Connect **homepage (Section 1.4)** is displayed.

4. There are three different ways to access Iron Mountain Connect Records Management from the homepage:

   - Click the **Records Management** link in the My Quick Links section.
   - Click the Record Centre title located in the centre portal on the screen.
   - Entersearch criteria in the **Find My Box/File** fieldin the Record Centre portal and click **Go**.

Iron Mountain Connect Records Management opens with the Search Results page displayed. You are able to **search for records stored at Iron Mountain (Section 3.5.1)**, or you can use the left-side navigation buttons to access additional Iron Mountain Connect Records Management functionality.

1.4 Iron Mountain Connect Homepage

The Iron Mountain Connect homepage gives you access to various Iron Mountain applications, and to components of Iron Mountain Connect Records Management based on your role and the Iron Mountain services that you have access to:

- **Records Management**
- **Report Centre**: Request and access reports to monitor your records management programmes. Run Inventory, Financial, Retention and Activity reports on a weekly or monthly basis. Is displayed if you have been granted access to the Basic Records Management report group from within your user profile.
- **Resources**: Your central repository for How To guides and other training materials.
- **System Notifications and What's New**: Important notifications and system enhancements.
- **Retention Schedule**: If you have submitted your record retention schedule to Iron Mountain, you are able to access it via this link.

Administrators also have access to:

- **Manage Users**: Client User Administrators (CUAs) are able to edit and add new users to their company list.
- **Resources (Upload Functionality)**: Client Content Administrators (CCAs) are able to upload a company logo and company documents such as corporate records policies and retention schedules.

1.5 Initial Sign On

The first time you sign on as a new user, you will need to:

- **Change the temporary password** you have been assigned
- **Set up your security questions and PIN**

> 🗒 **NOTE:** New users at companies with Single Sign On (SSO) capabilities do not set up security questions.

Setting/Changing Your Password

The first time you sign on as a new user, you will need to change the temporary password you have been assigned. Passwords must meet the following requirements:

- Be unique
- Be at least eight characters long
- Contain at least two letters
- Contain at least one number
- Contain at least one special character: ! @ # $ % ^ & *) (
- Cannot repeat the same character three or more times consecutively (for example, aaa)
- Cannot contain spaces
- Should not contain any portion of the user's first name, surname or username

For security purposes, users must reset passwords at designated time intervals.

> 🗒 **NOTE:**If you need to reset your password after you have begun using the application, the criteria above apply and the password cannot have been used as one of your previous 10 passwords.

Setting Your Security Questions and PIN

New users must also set security questions and a voice security personal identification number (PIN). These questions are used to verify your identity if you forget your password or have locked yourself out of the system with three unsuccessful attempts to enter your password. The PIN is used for placing orders via phone.

1. Select three different challenge questions (out of the 12 available questions) and enter your answers.
2. Enter a 4-digit numeric PIN code that you will use to identify yourself over the phone.

Reviewing your User Profile

The first time you sign on as a new user, you will be prompted to review your user profile after you set your password, security questions and PIN.

1. Update any incorrect or missing information.
2. Click **Confirm**.
3. Your changes are saved and the Iron Mountain Connect homepage opens.

1.6 Setting Your Password

For security purposes, users must change their temporary password after their initial login and must reset passwords at designated intervals. Passwords must meet the following requirements:

- Unique
- At least 8 characters long
- Contain at least two letters
- Contain at least one number
- Contain at least one special character: ! @ # $ % ^ & *) (
- Cannot repeat the same character three or more times consecutively (for example, aaa)
- Cannot contain spaces
- Should not contain any portion of the user's first name, surname or username
- **Returning users**: Cannot have been used as one of your previous 10 passwords (reusing passwords is discouraged)
- **Returning users**: 20% of the characters must be different from your previous password

> **NOTE:** If you need to reset your password after you have begun using the application, the criteria above apply plus the password cannot have been used as one of your previous 10 passwords.

1.7 Setting Your Security Questions and PIN

After you set your password you will need to set up security questions and a voice security personal identification number (PIN). These questions are used to verify your identity if you forget your password or have locked yourself out of the system with three unsuccessful attempts to enter your password. The PIN is used for placing orders via phone.

1. Select three different challenge questions (out of the 12 available questions) and enter your answers.
2. Enter a 4-digit numeric PIN code that you will use to identify yourself over the phone.

1.8 If You Forget Your Password

Returning users that have forgotten their password follow the steps below to reset it:

1. Click the **Forgot Your Password?** link on the Log In screen.
2. You have the option of resetting your password with your **security questions** or using the **Update Password** link:

   Password Reset using Security Questions:

   The application will randomly display two of the three security questions for you to answer. You must answer both questions correctly. You have three attempts at answering the security questions before being locked out of the application.

   1. Enter answers to the security questions.
   2. Click **OK**. The Change Password screen opens
   3. Enter your new, reset password.
   4. Confirm your new, reset password.
   5. Click **OK**. An email confirming your password reset will be sent to the email address in your user profile.
   6. Click **OK** to return to the Iron Mountain Connect Log In screen.
   7. Enter your username and new, reset password and click **Log In** to begin using Iron Mountain Connect.

   Refer to **Setting your Password (Section 1.6)** for password format requirements.

   Password Reset using Update Password Link:

   1. Click the **Update Password** link. The Changed Password screen opens and an email with your reset password is sent to the email address in your user profile.
   2. Click **OK**.
   3. From within the email, click the **Update Password** link to return to the Iron Mountain Connect Log In screen. Your username defaults.
   4. Enter or copy and paste your temporary password from the email and click **Log In**. The Change Password screen opens.
   5. Enter or copy and paste your temporary password from the email into the Existing or Temporary Password field.
   6. Enter then confirm your new password.
   7. Click **OK** to begin using Iron Mountain Connect.

   Refer to **Setting your Password (Section 1.6)** for password format requirements.

> 📋 **NOTE:** Click the **User Profile** link located in the upper right corner of the Iron Mountain Connect homepage to modify your security questions and answers. Refer to **Viewing Your User Profile (Section 1.10)** for additional information.

1.9 Password Lockout

 If you forget your password or make three unsuccessful attempts to access your account, the account will be locked for five minutes:

1. Click the **Forgot Password?** link in the onscreen message. The challenge questions you selected at your first login are displayed.
2. After you answer the challenge questions, you are able to reset your password. An email is sent to the email address on your user profile indicating that the reset has occurred.
3. Your account will be unlocked in approximately five minutes.

> **NOTE:** After one lockout, the account will lock after only one unsuccessful login attempt and you will have to wait five minutes before another attempt at logging in. For this reason, it is preferable to use the **Forgot Password?** functionality rather than repeatedly attempting to access the application.

1.10 Viewing Your User Profile

Your Client User Administrator creates and manages your user profile; however, you are able to view your own user profile:

1. Click **My Profile** from the **My Quick Links** section on the Iron Mountain Connect home page or click the **Profile** link located in the upper right-hand corner of the Iron Mountain Connect Home page.
2. Your user profile is displayed.
3. Scroll down to view your contact information, account settings and system access. To view your permissions, scroll down.
4. Click the links in the **Account** section to **reset your password (Section 1.8)** or **update your security questions (Section 1.7)**.

1.11 Downloadable User Guide

Users can access and download a copy of the Iron Mountain Connect Records Management User Guide via **Resources** in the **My Quick Links** section on the Iron Mountain Connect home page.

1.12 About This Online Help

Version

Iron Mountain Connect Records Management Online Help and User Guide

Updated C5.4 May 2018

Updated C5.3 February 2018

Updated C5.2 October 2017

Updated C5.1 August 2017

Updated C5.0 June 2017

Updated C4.3 April 2017

Updated C4.2 February 2017

Updated C4.1 November 2016

Updated C4.0 September 2016

Updated C3.2 July, 2016

Updated C3.1 May, 2016

Updated C3.0 March, 2016

Updated T2.5.2   January, 2015

Updated T2.5.1   14 November 2015

Updated: T2.5   14 September 2015

Base: Version T2.0 18 June 2015

Copyright/Confidentiality

Incorporated.

2 Administrative Functionality

2.1 Managing Users

2.1.1 Client User Administrators (CUA)

Client User Administrator Roles and Responsibilities

A Client User Administrator (CUA) is a user with administrative privileges who manages user profiles and grants permissions and organisational access to users within a company. A CUA automatically has complete organisational access and full permissions throughout Iron Mountain Connect Records Management. A CUA can also be a Client Content Administrator (CCA) if that access has been set; CUA's cannot be standard users.

A company may have more than one CUA; Iron Mountain recommends limiting the number of users in the CUA role.

A CUA is able to:

- Create and maintain Client Content Administrators, standard users and other CUAs
- Set and maintain user passwords
- Assign user access to Iron Mountain applications to which they have access
- Search for standard users, Client Content Administrators and other CUAs
- Access all functionality in Iron Mountain Connect Records Management

Creating a Client User Administrator (CUA)

1. Click **Manage Users** from the **My Quick Links** section on the Iron Mountain Connect homepage, or access it from the Users portal in the centre section of the screen.
2. Click the **Create User** button. The User Profile screen displays.
3. Complete all required fields.
4. From within the Account section of the screen:

   a. Set the role to **Client User Administrator**.

   b. Select the **Records Management** line of business.

5. Click **Save**. The user profile is complete. Full access and permissions to Iron Mountain Connect Records Management is AUTOMATICALLY set for Client Content Administrators; you do not need to grant user access and permissions manually.

2.1.2 Client Content Administrators (CCA)

Client Content Administrator (CCA) Roles and Responsibilities

A Client Content Administrator (CCA) is a user who has the ability to upload company content and branding to the Iron Mountain Connect Home page.

A CCA can also be a Client User Administrator, in which case he or she has additional administrative abilities as described in *Creating a Client User Administrator* below.

A CCA's system permissions and access must be manually set when his or her user profile is created; these settings determine the Iron Mountain Connect Records Management functionality that the CCA can use.

Creating a Client Content Administrator:

1. Click **Manage Users** from the **My Quick Links** section on the Iron Mountain Connect homepage, or access it from the Users portal in the centre section of the screen.
2. Click the **Create User** button. The User Profile screen displays.
3. Complete all required fields.
4. From within the Account section of the screen:

   a. Set the role to **Client Content Administrator**.

   b. Select the **Records Management** line of business.

5. Click **Save**. The user profile is complete; however, you must **grant the user system permissions and organisational access (Section 2.1.7)** to Iron Mountain Connect Records Management functionality.

2.1.3 Organisation Group Administrators (OGA)

Organisation Group Administrator (OGA) Roles and Responsibilities

An organisation group administrator (OGA) is able to:

- Create standard users that belong to the same organisation group that the OGA belongs to.
- Search for and update existing users that belong to the same organisation group that the OGA belongs to.
- Grant new standard users permissions that the OGA has access to.
- View permissions for standard users that are part of the organisation group that the OGA belongs to.

Organisation Group Administrator (OGA) Permissions

Permissions enable organisation group administrators to view and access workflows in Iron Mountain Connect Records Management. The system administrator must manually set permissions when creating or assigning an OGA.

Grant full permissions or limit the organisation group administrator's permissions as appropriate. As a control mechanism, you can set up an OGAwho has fewer permissions than the standard users in the organisation group. In this case, the organisation group administrator will be able to view the standard user's permissions, but will not be able to change them, and should the standard user's permissions need updating, the CUA for the company will need to make these changes.

Creating an Organisation Group Administrator (OGA)

Only client user administrators (CUA) are able to create organisational group administrators (OGA).

1. Click **Manage Users** from the **My Quick Links** section on the Iron Mountain Connect home page, or access it from the Users portal in the centre section of the screen.
2. Click the **Create User** button. The User Profile screen is displayed.
3. Complete all required fields.
4. From within the Account section of the screen:

   a. Set the role to **Records Management Organisation Group Administrator**.

   b. Select the **Records Management** line of business. This field MUST be selected when using organisation groups.

5. Click **Save**. The user profile is complete; however, you must grant the user system permissions and organisational access to Iron Mountain Connect Records Management functionality.
6. Click the **Records Management Access/Permissions** link to open the Records Management Access/Permissions screen.
   - **AssignPermissions**: Grant the appropriate permissions. Refer to the **Organisation Group Administrator (OGA) Permissions** section above.
   - **AssignOrganisational Access**: Click the tick boxes to assign access to the organisation groups that this OGA will oversee. The OGA will be able to create standard users and assign them to these organisation groups only.
7. Click **Save**. The OGA can now create and manage users for any of the organisations within the organisation group.

2.1.4 Standard Users

Standard User Roles and Responsibilities

Standardusers are assigned permissions that enable them to use selected Iron Mountain Connect Records Management functionality and access records for specified customers, divisions and departments.

Standard users can **view their own user profile (Section 1.10)**; however, they cannot change their permissions or

organisational access. They also cannot view or change other users' profiles.

Creating a Standard User:

1. Click **Manage Users** from the **My Quick Links** section on the Iron Mountain Connect homepage, or access it from the Users portal in the centre section of the screen.
2. Click the **Create User** button. The User Profile screen displays.
3. Complete all required **User Profile fields (Section 2.1.6)**.
4. From within the Account section of the screen:

   a. Enter a unique username.

   b. Set the role to **Standard User**.

   c. Set the **Password Reset** option:

   - **System-generated**: Leave this field set to System-generated to have Iron Mountain Connect automatically send a Welcome email containing a username, a system-generated temporary password and a login link to the email address on the user profile.
   - **Deselect System-generated**: Deselect System-generated to display the password fields. Manually enter and verify a password, then manually send an email containing the password to the user.

     > 📝 **NOTE**: If you are updating a user's status from Terminated or Locked Out to Active, Iron Mountain Connect automatically emails the manually-generated password to the email address on the user profile.

   d. If necessary, check the **Basic Records Management** report group to provide access to records management reports.

   e. Select the **Records Management** application.

5. Click **Save**. The user profile is complete; however, you must **grant the user system permissions and organisational access (Section 2.1.7)** to Iron Mountain Connect Records Management functionality.

2.1.5 Creating and Managing Users

Every Iron Mountain Connect Records Management user is required to have a user profile to log in and begin using the application. Client User Administrators are able to create user profiles based on specialised roles and security level needs within the organisation. Each user profile includes:

- A username and a unique email address
- Defined role

- Access to the appropriate line(s) of business
- Permission to use some or all of the Iron Mountain Connect Records Management features and functionality
- Access to the appropriate set of organisations (customers, divisions and departments)

There are four types of Iron Mountain Connect Records Management user, each with different roles. The Client User Administrator sets the type of user during the process of creating the user's profile:

- Client User Administrator (CUA)
- Client Content Administrator (CCA)
- Organization Group Administrator (OGA)
- Standard User

Refer to the **Client User Administrator (CUA), Client Content Administrator (CCA)**, **Organisation Group Administrator (OGA)** and **Standard User** sections for information about their roles and responsibilities and steps involved in creating each type of user.

> **NOTE:** The information included in this online help file is for Iron Mountain Connect Records Management users only. Iron Mountain Connect Records Management permissions and organisational access do not apply to other Iron Mountain Connect applications.

2.1.6 User Profile Fields

Use the information in the tables below to learn about the functionality of the fields on the User Profile screen, and whether the field is required or optional.

CONTACT INFORMATION		
Used to identify and maintain contact with the user		
Field	Functionality	Required?
Salutation	Select a salutation from the drop-down list	y
First Name	The user's first name	y
Middle Initial	The user's middle initial	n
Last Name	The user's surname	y
Post Name	The user's suffix, such as Jr. or III	n
Title	The user's job title	n
Address Line 1	First line of this user's postal address	y
Address Line 2	Additional line of the user's postal address such as a PO Box or suite number	n
Address Line 3	Additional line of the user's postal address such as a PO Box or suite number	n
City/Town	The city where this user is located	y

County/Region	The code representing the user's geographical region	y
Country	The country where this user is located	y
Postcode	The postal code used for mail delivery; must correlate to the city input above	y
Email	The email address where order confirmations and other electronic communications are sent. IMCRC validates to ensure that this is a unique email address.	y
Daytime Phone	The user's daytime phone number	y
Fax	The number where faxes for this user can be sent	n

SETTINGS		
Format data displayed in and generated by the application		
Field	Functionality	Required?
Preferred Language	American English defaults; change this as necessary	y
Time Zone	Defaults based on the Postcode	y
Date Format	Select the format for dates displayed in the application	y
Time Format	Select the format for times displayed in the application	y
Numeric Format	Select the format for numbers displayed in the application	y
Email Format	Select the format the application will use when generating email: ·HTML – email that contains all formatting and graphics ·Text – email that includes only text	y

ACCOUNT		
Security and access settings that ensure the safety of the user's account		
Field	Functionality	Required?
Username	Unique, alphanumeric username Cannot be changed after it has been saved Cannot contain special characters Must begin with a letter	y
Status	New users automatically have an Active status; refer to Deactivating a User (link) for additional information	n
Challenge Status	Changes from Active to Locked Out when the user is temporarily locked out of the application after entering an incorrect password three times or failing to answer security questions three times	n
Company	Defaults from the CUA's user profile	
Role	Click the appropriate tick box to set the user's role:	y

	· Client User Administrator	
	· Client Content Administrator	
	· Organisation Group Administrator	
	· Standard User	
Password Reset	Set the Password Reset option: System-generated (selected): Iron Mountain Connect automatically sends a Welcome email containing a username, a system-generated temporary password and a login link to the email address on the user profile. System-generated (deselected): Deselect to display the password fields and manually enter and verify a password, then manually send an email containing the password to the user.	n
Password	Password must be unique, and: · Be at least eight characters in length · Contain at least two letters · Contain at least one number or special character " ! ' ( ) , . : ; ? @ # % & * -_ { } [ ] / \ ` ~ $ ^ = + < > | · Cannot repeat the same character three or more times consecutively (for example, aaa) · Cannot contain spaces · Should not contain any portion of the user's first name, surname or username · Returning users: Cannot have been used as one of your previous 10 passwords (reusing passwords is discouraged) · Returning users: 20% of the characters must be different from your previous password	y
Retype Password	Retype the password to verify that you entered it correctly	y
Report Group	Select Basic Records Management to give access to reports supporting records management functionality	n
Applications	Select the Records Management application to ensure that the user has access to Iron Mountain Connect Records Management	y

2.1.7 Granting User Permissions and Access

> 📑 **NOTE:** There is a system delay that can last for up to five minutes immediately after you create the user profile record. Once the process is complete, you are able to assign and save user access and permissions.

After you create a user, you must grant the user system permissions and organisational access to use Iron Mountain Connect Records Management. You are able to grant user permissions and access while creating a user, or you can modify the user profile at a later time and update permissions and access as necessary.

- **System Permissions (Section 2.1.8)**: Grant permission to view and access workflows in Iron Mountain Connect Records Management. For example, a user may be able to order supplies but may be restricted from retrieving boxes and files.
- **Organisational Access**: Select the organisations of the company that the user will have access to. For example, a user may have access to the entire customer or be restricted to a specific department within the company.

1. Click the **Records Management Access/Permissions** link (upper left-hand side of screen) to open the Records Management Access/Permissions screen. This screen is read-only if you are creating a CUA; by default, CUAs get access to all permissions and organisations.
2. Use the following options to **assign (Section 2.1.8) user permissions (Section 2.1.8)**:

   a. Manually select the permissions that apply.

   b. Tick **Select All** to give the user system-wide records management permissions.

   c. Apply one of the predefined user templates listed in the upper right-hand section of the screen. Click **Template Guide** ☰ Template Guide to open an **information-only reference (Section 2.1.9)** to help you identify the appropriate template to apply. After you have identified the appropriate template, return to the User Profile screen, and select and apply the template. The template automatically selects the user permissions:

Template	Permissions
Search only	Permission to search for records stored at Iron Mountain
Data entry	Permission to create boxes and files
Orders only without permanently withdrawn	Permission to search for and view records; process and track orders; cannot permanently withdraw records stored at Iron Mountain
Orders only with permanently withdrawn	Permission to search for and view records; process and track orders; can permanently withdraw records stored at Iron Mountain
Standard	Permission to search for, create, edit and view records; process and track orders; can permanently withdraw records stored at Iron Mountain
Super	Permission to search for, create, edit and view records; process and track orders; can permanently withdraw records stored at Iron Mountain; limited administrative privileges include accessing Shredding and Manage Organisation
All records management	All permissions are granted

permissions	

> 📋 **NOTE:** If a permission is not enabled for your company, your users will not have access to that permission regardless of whether it is displayed on the template.
>
> Organisation group administrators (OGA) are only able to assign permissions that they have been granted access to.

> 📋 **NOTE:** If your company uses organisation groups, click the **To Organisation Group** radio button and select a single organisation group. Only organisation groups that you have access to are displayed in the drop-down list.

4. Use the tick boxes to grant the user organisational access to different divisions and/or departments within the company, or to the entire company.

> 📋 **NOTE:** Changes to the user profile are displayed in the Change History section.

2.1.8 User Permissions

Set the following user permissions to give access to Iron Mountain Connect Records Management functionality:

General

Permission	Functionality
Search for records	User is able to access *Search, Retrieve* and use the search functionality to locate records stored at Iron Mountain.

Service Options

Permission	Functionality
Check boxes out	User is able to create a retrieval order to check out boxes that are stored at Iron Mountain. *Checkout* delivery method is available for boxes from within the Search Results and Box Details screens and from within the retrieval basket.The Add to Basket option is available from the Search Results and Box Details screens.
Check files out	User is able to create a retrieval order to check out files that are stored at Iron Mountain. *Checkout* delivery method is available for files from within the Search Results and File Details screens and from within the

	retrieval basket.The Add to Basket option is available from the Search Results and File Details screens.
Order unlisted files	User is able to request unlisted files that are stored at Iron Mountain. *Request Unlisted File* action is available from the Search Results screen.
Permanently remove boxes from storage	User is able to select *Permanently Withdraw* as the delivery method for boxes during the Items step of a retrieval order and from within the retrieval basket. Boxes that a user permanently withdraws will not be returned (refiled) to Iron Mountain.
Permanently remove files from storage	User is able to select *Permanently Withdraw* as the delivery method for files during the Items step of a retrieval order and from within the retrieval basket.
Order copies of records	User is able to request photocopies of files to be delivered as specified on the order. User can select *Photocopy* delivery method for files from within the retrieval basket.
Order fax transmission of records	User is able to request that copies of the files be sent via facsimile transmission. User can select *Fax* and *Fax & Checkout* delivery methods for files from within the retrieval basket.
Order collection service	User is able to access *Quick Collection Order or Collection List (Add Records)* to create a collection order for new records or for returning (refile) records that will be stored at Iron Mountain.
Order supplies	User is able to access *Order Supplies* and order supplies from Iron Mountain.
Order Image on Demand	User is able to request an electronic copy of documents from files, unlisted files and unlisted open shelf files stored at Iron Mountain.*Request IOD* action is available from the Search Results screen and as a delivery method from within the retrieval basket.
Order X-ray on Demand	User is able to request an electronic copy of x-ray studies from files, unlisted files and unlisted open shelf files stored at Iron Mountain. The *Request XOD* action is available from the Search Results screen and as a delivery method from within the retrieval basket.
Enable collection order list workflow	User is able to select specific boxes to place on a collection order (Site Validation functionality). User has access to *Collection List (Add Records)* but does not have access to *Quick Collection Order*.

Service Level Options

Permission	Functionality
Half-day premium service	User is able to select half-day retrieval service as a shipping priority in the Details step when placing retrieval, collection and supply orders.

	NOTE: Service levels are also dependent on the level set for the customer in SafeKeeperPLUS™
Rush premium service	User is able to select rush retrieval service as a shipping priority in the details step when placing retrieval, collection and supply orders. NOTE: Service levels are also dependent on the level set for the customer in SafeKeeperPLUS™

Order Enquiry

Permission	Functionality
Track order	User is able to track retrieval, collection and supply orders from within *Track Orders*.
Update any user's order	From within *Track Orders* and from within the order details screen, user is able to cancel orders that were placed by other users that have a status of Submitted for Processing or On Hold.

Records Data Management

Permission	Functionality
View box record details	User is able to view the box details tab screen and is able to select box record columns to be displayed on the Search Results screen. If this permission is not selected, access to the box details will be limited throughout the application.
Edit box metadata	User is able to edit fields other than division and department on boxes stored at Iron Mountain.
Edit box organisational data	User is able to edit the division and department on boxes stored at Iron Mountain.
Edit box retention data	User is able to edit an asset's retention data from within the Box Details screen in *Search, Retrieve* including Record Code, Destruction Indicator, Destruction Eligibility Period and Destruction Date.
Create box record	User is able to create boxes from within *Collection List (Add Records)*.
View file record details	User is able to view the file details tab screen and select file record columns to be displayed on the Search Results screen. If this permission is not selected, access to the file details will be limited throughout the application.
Edit file metadata	User is able to edit fields other than division and department on files stored at Iron Mountain.
Edit file	User is able to edit the division and department on files stored at Iron

organisational data	Mountain.
Create file record	User is able to create files from within *Collection List (Add Records)*.
Enforce refile box metadata completion	User is required to enter missing, required metadata on boxes and files when editing them within *Search, Retrieve*, and before adding a returning (refile) box onto a Collection List (Site validation functionality).
Apply hold codes to records	User is able to apply hold codes directly to records from within the Box Details screen in *Search, Retrieve*.
Remove hold codes from records	User is able to remove hold codes applied directly to records from within the Box Details screen in *Search, Retrieve*.

Bulk Data Upload

Permission	Functionality
Bulk Upload	User is able to upload metadata from a .csv data file in order to automatically create up to 200 records.

Administration

Permission	Functionality
Manage customer settings	User is able edit the order confirmation email address and the postal/correspondence address.
View Organisations	User is able to view organisational information from within *Manage Organisations*.
Manage divisions	User is able to create and update divisions from within *Manage Organisation*.
Create hold codes	User is able to create hold codes from within *Manage Holds*.
Edit hold codes	User is able to edit hold codes from within *Manage Holds*.
Assign/remove record code holds	User is able to add holds and remove holds from record codes from within *Manage Holds*.
Manage departments	User is able to create and update departments from within *Manage Organisation*.
Assign/remove department holds	User is able to add holds and remove holds from departments from within *Manage Holds*.
View record code profiles	User is able to view record codes and associated metadata from within *Manage Record Codes*.
Manage record codes	User is able to create and edit record codes from within *Manage Record Codes*.
Customise supply list	User is able to access *Manage Supply List* and create and assign

	custom supply lists.
Manage templates	*Manage Box Templates* and *Manage Files Templates* are available from the Administration menu.
View addresses	User is able to view addresses from within *Manage Addresses*.
Manage organisation groups	User is able to create and edit organisation groups from within *Manage Organisation Groups*.
Create/edit shipping address	User is able to create and update shipping addresses from within *Manage Addresses*.
Access shredding services	User is able to access *Shredding Centre* from the Iron Mountain Connect home page without being blocked by an error message.
Edit shredding visit profile contact	User is able to edit the shredding contact from within *Shredding Centre*.

2.1.9 User Permission Template

Guide to Permissions Templates

This screen is an information-only reference to use when you create users. Review the user permission templates below to identify the appropriate template to apply. After you have identified the appropriate template, return to the User Profile screen and select and apply the template.
Note: Permissions that are checked will be assigned when you create a user. If a permission is not enabled for your company, your users will not have access to that permission regardless of whether it is displayed on the template that you select.

	End User: Search Only	End User: Data Entry Only	End User: Order Only without Permanent Withdrawal	End User: Order Only with Permanent Withdrawal	End User: Standard	End User: Super	All Records Management Permissions
General							
Search for Records	✔		✔	✔	✔	✔	✔
Services Options							
Check boxes out			✔	✔	✔	✔	✔
Check files out			✔	✔	✔	✔	✔
Order unlisted files			✔	✔	✔	✔	✔
Order image on demand			✔	✔	✔	✔	✔
Order x-ray on demand			✔	✔	✔	✔	✔
Order copies of records			✔	✔	✔	✔	✔
Order fax transmission			✔	✔	✔	✔	✔
Order fax transmission of records			✔	✔	✔	✔	✔
Order pickup services			✔	✔	✔	✔	✔
Order supplies			✔	✔	✔	✔	✔
Permanently remove boxes from storage				✔	✔	✔	✔
Permanently remove files from storage				✔	✔	✔	✔
Services Levels							
Premium half day						✔	✔
Premium service rush						✔	✔
Order Inquiry							
Track order			✔	✔	✔	✔	✔
Update any user's order							✔
Records Data Management							
View box record details	✔		✔	✔	✔	✔	✔
Create box record		✔			✔	✔	✔
Edit box metadata					✔	✔	✔
Edit box organizational data					✔	✔	✔
View file record details	✔		✔	✔	✔	✔	✔
Create file record		✔			✔	✔	✔
Edit file metadata					✔	✔	✔
All Records Management Permissions							
Manage customer settings							✔
Customize supply list							✔
View addresses						✔	✔
Create/Edit shipping labels							✔
View organizations						✔	✔
Manage templates							✔
Assign user permissions							✔
Assign user organizations							✔
Manage divisions							✔
Manage departments							✔
Access shredding services						✔	✔
Edit shredding visit profile contact							✔

2.1.10 Modifying a User

Client User Administrators are able to modify a user's profile.

1. Click **Manage Users** from the **My Quick Links** section on the Iron Mountain Connect home page or from the Userportal in the centre section of the screen. The User Management screen opens.
2. **Search for the user (Section 2.1.11)** whose profile you need to modify.

3. Make any necessary changes. From within the Account section of the screen:

    a. Set the role to **Client User Administrator**, **Client Content Administrator**, **Standard User** or **Records Management Organisation Group Administrator**.

    b. If necessary, check the **Basic Records Management** report group to provide access to records management reports.

    c. Set the **Password Reset** option:

    - **System-generated**: Leave this field set to System-generated to have Iron Mountain Connect automatically send a Welcome email containing a username, a system-generated temporary password and a login link to the email address on the user profile.

    - **Deselect System-generated**: Deselect System-generated to display the password fields. Manually enter and verify a password, then manually send an email containing the password to the user.

    > 📋 **NOTE:** If you are updating a user's status from Terminated to Active via the **Activate** button on the User Profile screen or via the **Account** button on the User Search Results screen, Iron Mountain Connect automatically emails the manually-generated password to the email address on the user profile.

    d. If necessary, check the **Basic Records Management** report group to provide access to records management reports.

    e. Select the **Records Management** application.

4. Click **Save**. The user profile is complete.

5. **Update the user's system permissions or organisational access (Section 2.1.7)** if necessary.

2.1.11 Searching for an Existing User

1. Click **Manage Users** from the **My Quick Links** section on the Iron Mountain Connect home page. The User Management screen opens.
2. Click the **Record Management Users** radio button. This limits your search to users with access to the records management application (Records Management line of business set in their user profile). Users with access to Shredding Centre only will not be included. Additional filters are available when the Record Management Users button is selected.
3. Set the filters for your search. You must set at least one filter to execute a search, or you can combine multiple filters to narrow your search:

> 📋 **NOTE:** When an organisation group administrator (OGA) searches for users, the search results are limited to users within the organisation group that he or she has access to

a. To search for a specific user, select from the drop-down list of **User Properties**. Once selected, the drop-down list changes to an entry field. Enter the user's username, email address, first name or surname.

b. Select a second User Property to further refine your search.

c. To search for users who have **permission (Section 2.1.8)** to perform specific workflows, select from the Permission drop-down menu. All users with the permissions that you selected, plus any other permission settings, will be included in your results. Permissions are set when you **grant user system permissions and organisational access (Section 2.1.7)** after creating the user profile.

d. To search for users within an organisation group, select from the **Organisation Group** drop-down list.

e. To search for users within your company's organisational hierarchy, select from the **Customer** drop-down list.

f. If you used the Customer filter and the customer is division- and/or department-enabled, select Division and/or Department filters.

4. Click **Search**. All users that match your filter criteria are displayed on the screen.

> **NOTE:** Click **Refresh** to clear and reset the filters in order to start a new search.

2.1.12 Multi-User Edit: Permissions

1. Iron Mountain Connect Records Management gives you the time-saving ability to set and/or update system permissions for multiple users at one time.
2. Click **Manage Users** from the My Quick Links section on the Iron Mountain Connect home page. The User Management screen opens.
3. Follow the steps in **Searching for Existing Users (Section 2.1.11)** to bring up a list that includes the users for whom you need to set or change system permissions.
4. Click the tick boxes to select the users.
5. Click the **Action** button and select from the drop-down menu:
   - Add Permissions
   - Remove Permissions

6. The Multi-Edit Permissions screen opens:

   a. Manually select the permissions that apply.

   > OR

   b.Tick **Select All** to set or remove system-wide records management permissions for the selected users.

7. Click **Confirm**. The permissions and user IDsare displayed on screen.
8. Click **Yes, Submit Request** to submit your request and generate an email confirming the changes. The email is sent to the email address on the user profile of the administrator making the changes.

2.1.13 Multi-User Edit: Access

Iron Mountain Connect Records Management gives you the time-saving ability to set and/or update organisational access for multiple users at one time.

- Click **Manage Users** from the My Quick Links section on the Iron Mountain Connect home page. The User Management screen opens.
- Follow the steps in **Searching for Existing Users (Section 2.1.11)** to bring up a list that includes the users for whom you need to set or change system permissions.
- Click the tick boxes to select the users.
- Click the **Action** button and select from the dropdown menu:
  - Add Access
  - Remove Access
- The Multi-Edit Access screen opens.
- Use the tick boxes to grant the users access to divisions and/or departments within the company, or to the entire company.
- Click **Confirm**. The accessible/inaccessible areas of the organisation and the user IDs are displayed on screen.
- Click **Yes, Submit Request** to submit your request and generate an email confirming the changes. The email is sent to the email address on the user profile of the administrator making the changes.

2.1.14 Multi-User Edit: Organisation Group Access

Client User Administrators (CUAs) and Organisation Group Administrators (OGAs) have the time-saving ability to set and/or update organisation groups for multiple standard users at one time.

1. Click **Manage Users** from the My Quick Links section on the Iron Mountain Connect home page. The User Management screen opens.
2. Follow the steps in **Searching for Existing Users (Section 2.1.11)** to bring up a list that includes the users for whom you need to set or change the organisation group.
3. Click the tick boxes to select the users.
4. Click the **Action** button and select **Organisation Group Access**. The Manage Organisation Group Access screen opens.
5. Select the organisation group and click **Confirm>**.

   > 📋 **NOTE:** Create organisation groups from within **Records Management | Administration | Manage Organisation Groups**.

6. Confirm the organisation group change for the selected users and click **Submit Request**.
7. A message displays indicating that the confirmation details will be emailed to you. Click **OK**.
8. After the organisation group is updated, you receive a system-generated email confirmation from Iron Mountain Connect Records Management.

   > 📋 **NOTE:** You cannot use multi-user edit functionality to update Client User Administrators (CUAs) and

Organisation Group Administrators (OGAs).

2.1.15 Cloning Users

Cloning enables you to copy a selected user's profile with address fields, settings and account information intact. This saves data entry time when creating multiple users with similar profiles.

1. Click **Manage Users** from the **My Quick Links** section on the Iron Mountain Connect home page. The User Management screen opens.
2. Select the user you wish to clone. You are able to clone a new user immediately after **creation (Section 2.1.5)**, or **search for existing users (Section 2.1.11)** and select from this list.
3. Click **Clone User**. The Create User screen appears with the address fields, settings and account information copied.
4. Complete all required fields. You are able to update information that was cloned.
5. From within the Account section of the screen:
6. Click **Save**. The user profile is complete; however, you must **grant the user access and permissions (Section 2.1.7)** to Iron Mountain Connect Records Management functionality.

   a. Set the role to **Client User Administrator**, **Client Content Administrator**, **Standard User** or **Records Management Organisation Group Administrator**.

   b. If necessary, check the **Basic Records Management** report group to provide access to records management reports.

   c. Select the **Records Management** .

> **NOTE:** You are able to clone a single user at a time; cloning functionality is not available if you have more than one user tick box selected.

2.1.16 Activating and Terminating Users

This toggle enables you to instantaneously cancel or reactivate a user's Iron Mountain Connect Records Management profile, which controls the user's ability to log in and use the application. Terminating a user does not remove the user's profile or associated data; only system access is affected.

- **Activate**: Change a user's profile to immediately restore access to Iron Mountain Connect and Iron Mountain Connect Records Management
- **Terminate**: Change a user's profile to immediately remove the user's access to Iron Mountain Connect and Iron Mountain Connect Records Management

> **NOTE:** The Activate toggle is only for users that were previously set to *Terminated* or *Inactive* status.

To activate/terminate a user:

1. Click **Manage Users** from the **My Quick Links** section on the Iron Mountain Connect home page. The User Management screen opens.
2. Follow the steps in **Searching for Existing Users (Section 2.1.11)** to find the user you need to activate/terminate.
3. Click the tick box to select the user you wish to activate/terminate.
4. Click the **Account** button and toggle the user's status:

   a. If the user's status is set to *Active*, the **Terminate Selected** toggle will be available.

   b. If the user's status is set to *Inactive* or *Terminated*, the **Activate Selected** toggle will be available.

5. The change in status takes effect immediately. A success message is displayed at the top of the screen indicating that the application is processing the change request and updating the user's profile.

> **NOTE:** If the user is logged in when he or she is terminated, the system will automatically log the user out.

2.1.17 Exporting a List of Users

Export the list of users displayed on the screen in .csv and .xml formats. System administrators and users who have access to the Manage Users selection are able to generate this export.

> **NOTE:** When an organisation group administrator (OGA) searches for users, the search results are limited to users within the organisation group that he or she has access to and may not be a complete report.

1. Click **Manage Users** from the My Quick Links section on the Iron Mountain Connect homepage. The User Management screen opens.
2. Follow the steps in Searching for Existing Users and generate a list of users that match your search criteria.
3. Click the**Export**link located in the upper right-hand side of the screen and select the export format from the dropdown menu:
   - **Export Users (CSV)** – generates the user list formatted as a comma delimited file
   - **Export Users (XML)** – generates the user list formatted in .xml
4. Follow the export prompts at the bottom of the screen to open, save or cancel the export.

Exporting a List of ALL Users

Use the steps listed below to generate an export listing ALL Records Management users and their organisational access and permissions. This provides the same data included in the Record Centre User report.

1. Click **Manage Users** from the My Quick Links section on the Iron Mountain Connect homepage. The User

Management screen opens.
2. Click the **Record Management Users** radio button. This limits your search to users with access to the records management application (Records Management line of business set in their user profile). Users with access to Shredding Centre only will not be included.
3. Set the **Permissions** filter to a basic permission that you know all of your users have access to such as: *Search for Records*.
4. Leave the **Customer** filter set to *All*.
5. Click **Search**. A list of all Records Management users displays.
6. Click the**Export**button located in the upper right-hand side of the screen and select the export format from the dropdown menu:
    - **Export Users (CSV)** – generates the user list formatted as a comma delimited file
    - **Export Users (XML)** – generates the user list formatted in .xml
7. Follow the export prompts at the bottom of the screen to open, save or cancel the export.

2.1.18 Uploading Logos to the Iron Mountain Connect Homepage

Client Content Administrators are able to upload a company logo to the Resources tab. The following restrictions apply:

- Less than 25 KB
- .jpg or .gif
- 280 x 60 pixels

> **NOTE:** The Training and Line of Business tabs are populated by Iron Mountain and cannot be edited by the Client Content Administrator.

1. Click **Resources** from the **My Quick Links** section on the Iron Mountain Connect homepage. Your company's Resource screen opens; this screen contains links to training materials provided by Iron Mountain as well as internal documents such as your company's corporate records policies and retention schedules.
2. Select the **(your company name) Documents** button.
3. Select **Upload Logo**.
4. Select the logo file and click **Submit**.
5. A success message is displayed and the logo is displayed in the upper right-hand corner of the Iron Mountain Connect homepage.

> **Note**: You are able to upload one logo for your company. The logo will display to all of your company's users. **Upload Logo** functionality is not available again until you have deleted the logo. Use the **Update** and **Delete** buttons to perform the appropriate actions.

2.1.19 Uploading Documents to the Iron Mountain Connect Homepage

Client Content Administrators (CCAs) are able to upload up to 25 company documents to the Resources tab. Documents are displayed to all users under your company's custom tab in **Resources** if content has been provided.

1. Click **Resources** from the **My Quick Links** section on the Iron Mountain Connect home page. Your company's Resource screen opens; this screen contains links to training materials provided by Iron Mountain as well as internal documents such as your company's corporate records policies and retention schedules.
2. Select the **(your company name) Documents** button.
3. Click **Upload Document**.
4. Enter a title for the document and select the file to be uploaded.
5. Click **Submit** to complete the upload.
6. A success message is displayed and the document is available when you select the (your company name) Documents button.
7. Use the **Update** and **Delete** buttons to modify or remove the document.

2.2 Managing Your Organisation

2.2.1 Managing Your Organisation

Use this selection to view and administer customer, division and department level account information from within one screen. The information displayed is based on the records management hierarchy set up for your company in Iron Mountain Connect Records Management.

Select **Records Management| Administration | Manage Organisations**. The Manage Organisations screen opens; by default, all active customers are displayed.

You are able to perform the following tasks:

View Your Organisation's Records Management Data

1. Select a customer. Scroll down to the Information portion of the screen to view records management data and links for the selected customer.

3. If the customer is division- and/or department-enabled, you can also see information related to these levels within the customer. Select a division and/or department. The following constraints apply:

- If the customer is division-enabled, all active divisions are displayed and you must select a division to view departments.

- If the customer is not division-enabled but is department-enabled, all active departments are displayed.

- If the customer is not division- or department-enabled, the Division and Department sections appear greyed out.

> **NOTE:** Master divisions and master departments are not validated; they are automatically created and utilised by SafeKeeperPLUS.

4. Scroll down to the Information portion of the screen to view records management data and links for the division or department selected.

Display Inactive Customers

Use this functionality to view records management data for inactive customers. Inactive customers cannot transact orders; however, they are able use Iron Mountain Connect Records Management to search for records, track orders and view box and file history.

1. Select a customer.
2. Click the **Show Inactive** tick box above the customer section of the screen.
3. Inactive customers are displayed in red in the list, and are marked as INACTIVE in the header of the Information section. Depending on the number of customers, you may need to use the scroll bar to locate the inactive customers in the list.

Display Inactive Departments

Use this functionality to view records management data for an inactive department. An inactive department is one in which customers cannot add records; however, they are able to view inventory and place retrieval and collection orders for existing records.

1. Select a department.
2. Click the **Show Inactive** tick box above the department section of the screen.
3. Inactive departments are displayed in red in the list, and are marked as INACTIVE in the header of the Information section. Depending on the number of departments, you may need to use the scroll bar to locate the inactive customers in the list.

View Your Storage Summary

An at-a-glance view of your monthly storage statistics for customers, divisions and departments in your organisation.

Field	Information Displayed
Volume	Total number of boxes and files, and the total volume in cubic metres used last month
New Received	Cubic metres of new records received for storage during the previous month; quantity is calculated on the last day of the previous month.
Permanently Withdrawn	Cubic metres of records that were permanently withdrawn from storage

	during the previous month; quantity is calculated on the last day of the previous month.
Destroyed	Cubic metres of records that were destroyed at the customer's request during the previous month; quantity is calculated on the last day of the previous month. Does not include unlisted, permanently withdrawn or destroyed files.

Enter Order Confirmation Email Addresses

Enter addresses for up to three users that will receive copies of ALL order confirmations generated, regardless of the requester.

1. Select a customer.
2. Click **Edit**. The Edit Order Confirmation Emails screen opens.
3. Enter names and addresses for up to three users that will receive copies of ALL order confirmations generated, regardless of the requester. Both the name and the address are required for each entry.
4. Click **Save**.

> 📝 **NOTE:** To remove a user from this list, simply select the username and the user email address and use your **Backspace** key to remove the entry.

View the Organisational Hierarchy

View data illustrating where the selected customer, division or department fits within the organisation's overall hierarchy. The data displayed here changes based on the level of the organisation selected.

Access Your Shipping Addresses

The link provided in the Address Profile enables you to access the Manage Addresses screen where you can view, add and edit this customer's shipping addresses. All addresses are maintained from within the Manage Addresses selection to ensure that they are synchronised system-wide.

1. Select a customer.
2. Click on the number of shipping addresses. The Manage Addresses screen opens. Refer to **Creating Your Shipping Addresses (Section 2.8.3)** for step-by-step instructions on adding, editing and viewing shipping addresses.

View and Update Your Mailing/Invoice Address

This is the address to which Iron Mountain mails company information and/or invoices; this address defaults based on the remittance level set in your customer profile. As an administrative user you are able to view and edit the mailing address

Contact **Iron Mountain Customer Service** should you need to update your invoice address.

> 📋 **NOTE:** The title displayed in this section of the screen varies based on the default address.

View Your Service Level

Service Levels are optional parameters that apply when a customer places a collection, retrieval or supply order. A customer can have the following Service Levels:

SERVICE LEVELS	
Parameter	**Functionality**
Require an active purchase order number at the order level	Users will be required to enter a purchase order number on the Item screen of the Basket when processing an order for this customer.
Require a purchase order number for the department incurring the cost of the order	Users will be required to enter a purchase order number on the Item screen of the Basket when processing an order for this customer.
Recommend a purchase order number for the department incurring the cost of the order	The Apply Chargeback field will be displayed on the Item screen of the Basket, but will not be required when processing an order for this customer
Validate collection orders at the customer facility	Collection orders are electronically scanned and entered into the system by an Iron Mountain driver as part of the collection process.

View Your Service Priorities

Service Priorities guarantee the time frame within which Iron Mountain will collect or deliver orders that are received prior to an established cut-off time. At least one priority level must be set; priorities are displayed in the Details screen of the Basket. A customer can have the following priorities.

PRIORITIES			
Priority	**Order Receipt Cut-off**	**Service Provided By**	**Order Type**
Next Day Retrieval Service	3:00 p.m.	5:00 p.m. on the next business day	Retrieval Order
Half-Day Retrieval Service	10:00 a.m.	5:00 p.m. on the same business day	Retrieval Order
(Premium Service Half-Day must be selected in the User Profile to enable the user to access this permission)	3:00 p.m.	12:00 p.m. (noon) on the next business day	Retrieval Order
Rush Retrieval Service	Before 3:00 p.m.	Within three hours on the same working day	Retrieval Order
(Premium Service Rush must be selected in the User Profile to enable the user to access	After 3:00 p.m.	11:00 a.m. on the next business day	Retrieval Order

this permission)			
Normal Collection Service	Any time	Within two working days	Collection Order
Scheduled Service (This priority is not listed in Service Priorities; however, it is an option for all users from within the Detail screen of the Basket.)	None	At a scheduled time prior to 5:00 p.m. on a user-selected date Note that the user is only able to select a date that occurs after the next available service date, which is based on the Service Provided By time in the Shipping Priorities available to them.	Retrieval Orders and Collection Orders

View Your Data Profile

The Data Profile is a set of parameters that control record storage and transmittal. A customer can have the following Data Profile parameters set:

DATA PROFILE	
Parameter	Explanation
Files are individually listed.	All departments for this customer individually list files in the same data format.
Files are not individually listed.	No departments individually list files.
Files for some departments are individually listed.	Some, but not all, departments individually list files in the same data format.
Box data keyed from Iron Mountain transmittals.	Box records are input from Iron Mountain transmittal forms.
Box data keyed from customer transmittals.	Box records are input from customer transmittal forms.
Records must be assigned to valid Departments.	Each new record must have a valid Department ID. If new records do not require valid departments, then this line is blank.
Records must be assigned valid Record Codes.	Each new record must have a valid Department ID. If new records do not require valid record codes, then this line is blank.
Box templates are enabled.	Customer defines which fields are required and enabled when a box is created.
File templates are enabled.	Customer defines which fields are required and enabled when a file is created.
X-Ray on Demand service enabled.	Customer has contracted for X-Ray on Demand service, enabling analogue films that are stored at Iron Mountain to be electronically scanned, digitised and

	transmitted.
Image on Demand service enabled.	Customer has contracted for Image on Demand service, enabling files that are stored at Iron Mountain to be electronically scanned and transmitted.

Add a Division

A division is a customer-defined organisational unit that may consist of one or more departments. Administrative users that have the **Manage Division permission (Section 2.1.8)** are able to create divisions for companies that are division-enabled.

1. Select a division-enabled customer. The screen updates to display records management data and links for the customer that you selected.

2. From within the division section of the screen, click the **Create New** link. The Create Division screen opens.

3. Enter a Division ID and a Division Name. The Division ID can be up to 12 alphanumeric characters; the Division Name can be up to 35 alphanumeric characters and can include special characters.

4. Click **Save & Close**, or click **Save & Add Department (Section 2.2.14).** The division that you created is displayed on screen.

Add a Department

A department is a customer-defined subdivision of an organisation. Administrative users that have the **Manage Department permission (Section 2.1.8)** are able to create departments for companies that are department-enabled.

1. Select a department-enabled customer. The screen updates to display records management data and links for the customer that you selected.
2. If the customer is division- and department-enabled, select a division.
3. From within the department section of the screen, click the **Create New** link. The Create Department screen opens.
4. Enter a Department ID and a Department Name. The Department ID can be up to 12 alphanumeric characters; the Department Name can be up to 35 alphanumeric characters and can include special characters.
5. Select the Data Format for files stored by this department:

    - If files are tracked, click **List files** and select the entry method from the drop-down list.

    - If files are not tracked, click **Do not list files**.

5. Click **Save & Close**, or click **Save & Add Department** if you need to add multiple departments within the same division. The department that you created is displayed on screen.

2.2.2 Viewing Your Organisation's Records Management Data

1. As an administrative user, you are able to select **Records Management | Administration | Manage Organisations**. The Manage Organisations screen opens; by default, all active customers are displayed.
2. Select a customer. Scroll down to the Information portion of the screen to view records management data and links

for the selected customer.

3. If the customer is division- and/or department-enabled, you can also see information related to these levels within the customer. Select a division and/or department. The following constraints apply:

   - If the customer is division-enabled, all active divisions are displayed and you must select a division to view departments.
   - If the customer is not division-enabled but is department-enabled, all active departments display.
   - If the customer is not division- or department-enabled, the Division and Department sections appear greyed out.

> **NOTE:** Master Divisions and Master Departments not validated; they are automatically created and utilised by SafeKeeperPLUS™.

4. Scroll down to the Information portion of the screen to view records management data and links for the division or department selected.

2.2.3 Displaying Inactive Customers

As an administrative user, you are able to use this functionality to view records management data for inactive customers. Inactive customers cannot transact orders; however, they are able use Iron Mountain Connect Records Management to search for records, track orders and view box and file history.

1. Select **Records Management | Administration | Manage Organisations**. The Manage Organisations screen opens; by default, all active customers are displayed.
2. Select a customer.
3. Click the **Show Inactive** tick box above the customer section of the screen.
4. Inactive customers are displayed in red in the list, and are marked as INACTIVE in the header of the Information section. Depending on the number of customers, you may need to use the scroll bar to locate the inactive customers in the list.

2.2.4 Displaying Inactive Departments

As an administrative user, you are able to use this functionality to view records management data for inactive departments. An inactive department is one in which customers cannot add records; however, they are able to view inventory and place retrieval and collection orders for existing records.

1. Select **Records Management | Administration | Manage Organisations**. The Manage Organisations screen opens; by default, all active customers are displayed.
2. Select a customer.
3. Click the **Show Inactive** tick box above the department section of the screen.
4. Inactive departments are displayed in red in the list, and are marked as INACTIVE in the header of the Information

section. Depending on the number of departments, you may need to use the scroll bar to locate the inactive customers in the list.

2.2.5 Viewing Your Storage Summary

As an administrative user, you are able to use the Storage Summary section of the screen in **Records Management |Administration | Manage Organisations** to obtain an at-a-glance view of the monthly storage statistics for customers, divisions and departments in the organisation.

STORAGE SUMMARY	
Field	Information Displayed
Volume	Total number of boxes and files, and the total volume in cubic metres used last month
New Received	Cubic metres of new records received for storage during the previous month; quantity is calculated on the last day of the previous month.
Permanently Withdrawn	Cubic metres of records that were permanently withdrawn from storage during the previous month; quantity is calculated on the last day of the previous month.
Destroyed	Cubic metres of records that were destroyed at the customer's request during the previous month; quantity is calculated on the last day of the previous month. Does not include unlisted, permanently withdrawn or destroyed files.

2.2.6 Entering Order Confirmation Email Addresses

As an administrative user, you are able to enter addresses for up to three users that will receive copies of ALL order confirmations generated, regardless of the requester.

1. Select **Records Management | Administration | Manage Organisations**. The Manage Organisations screen opens; by default, all active customers are displayed.Select a customer.
2. Click **Edit**. The Edit Order Confirmation Emails screen opens.
3. Enter names and addresses for up to three users that will receive copies of ALL order confirmations generated, regardless of the requester. Both the name and the address are required for each entry.
4. Click **Save**.

2.2.7 Viewing the Organisational Hierarchy

As an administrative user, you are able to use the Organisations/Organisational Hierarchy section of the Manage Organisations screen (**Records Management | Administration | Manage Organisations)** to view data illustrating where the selected customer, division or department fits within the organisation's overall hierarchy. The data displayed here changes based on the level of the organisation selected.

2.2.8 Accessing Your Shipping Address

As an administrative user, the link provided in the Address Profile section of the Manage Organisations screen gives you access to the **Manage Addresses** selection, where you can view, add and edit this customer's shipping addresses. All addresses are maintained from within the **Manage Addresses** selection to ensure that they are synchronised system-wide.

1. Select **Records Management | Administration | Manage Organisations**. The Manage Organisations screen opens; by default, all active customers are displayed.
2. Select a customer.
3. Click on the number of shipping addresses. The Manage Addresses screen opens. Refer to **Managing Your Shipping Addresses (Section 2.8.3)** for step-by-step instructions on adding, editing and viewing shipping addresses.

2.2.9 Viewing Your Mailing & Invoice Addresses

As an administrative user, you are able to use the Mailing Address section of the Manage Organisations screen in **Records Management |Administration | Manage Organisations**, to view and edit the address to which Iron Mountain mails company information and/or invoices; this address defaults based on the remittance level set in your customer profile.

Contact **Iron Mountain Customer Service** should you need to update your invoice address.

📋 **NOTE:** The title displayed in this section of the screen varies based on the default address.

2.2.10 Viewing Your Service Level

As an administrative user, you are able to view Service Levels from within **Records Management |Administration | Manage Organisations**. Service Levels are optional parameters that apply when a customer places a collection, retrieval or supply order. A customer can have the following Service Levels:

SERVICE LEVELS	
Parameter	**Functionality**
Require an active purchase	Users will be required to enter a purchase order number on the Item screen of the

order number at the order level	basket when processing an order for this customer.
Require a chargeback code for the department incurring the cost of the order	Users will be required to enter a chargeback code on the Item screen of the basket when processing an order for this customer.
Recommend a chargeback code for the department incurring the cost of the order	The Apply Chargeback field will display on the Item screen of the basket, but will not be required when processing an order for this customer
Validate collection orders at the customer facility	Collection orders are electronically scanned and entered into the system by an Iron Mountain driver as part of the collection process.

2.2.11 Viewing Your Service Priorities

As an administrative user, you are able to view Service Priorities from within **Records Management |Administration | Manage Organisations.** Priorities guarantee the time frame within which Iron Mountain will pick up or deliver orders that are received prior to an established cut-off time.   At least one Priority level must be set; priorities are displayed in the Details screen of the basket. A customer can have the following Priorities:

PRIORITIES			
Priority	**Order Receipt Cutoff**	**Service Provided By**	**Order Type**
Next Day Retrieval Service	3:00 p.m.	5:00 p.m. on the next business day	Retrieval Order
Half Day Retrieval Service	10:00 a.m.	5:00 p.m. on the same business day	Retrieval Order
(Premium Service Half-Day must be selected in the User Profile to enable the user to access this permission)	3:00 p.m.	12:00 p.m. (noon) on the next business day	Retrieval Order
Rush Retrieval Service	Before 3:00 p.m.	Within three hours on the same business day	Retrieval Order
(Premium Service Rush must be selected in the User Profile to enable the user to access this permission)	After 3:00 p.m.	11:00 a.m. on the next business day	Retrieval Order
Normal Collection Service	Any time	Within two business days	Collection Order
Scheduled Service	None	At a scheduled time prior to 5:00	Retrieval Orders

(This priority is not listed in Service Priorities; however, it is an option for all users from within the Detail screen of the basket.)		p.m. on a user-selected date Note that the user is only able to select a date that occurs after the next available service date, which is based on the Service Provided By time in the Shipping Priorities available to them.	and Collection Orders

2.2.12 Viewing Your Data Profile

As an administrative user, you are able to view the Data Profile from within **Records Management | Administration | Manage Organisations**. The Data Profile is a set of parameters that control record storage and transmittal. A customer can have the following Data Profile parameters set:

DATA PROFILE	
Parameter	**Explanation**
Files are individually listed	All departments for this customer individually list files in the same data format.
Files are not individually listed	No departments individually list files.
Files for some departments are individually listed	Some, but not all, departments individually list files in the same data format.
Box data keyed from Iron Mountain transmittals	Box records are input from Iron Mountain transmittal forms.
Box data keyed from customer transmittals	Box records are input from customer transmittal forms.
Records must be assigned to valid Departments	Each new record must have a valid Department ID. If new records do not require valid departments, then this line is blank.
Records must be assigned valid Record Codes	Each new record must have a valid Department Id. If new records do not require valid record codes, then this line is blank.
Box templates are enabled	Customer defines which fields are required and enabled when a box is created.
File templates are enabled	Customer defines which fields are required and enabled when a file is created.

X-ray on Demand service enabled	Customer has contracted for X-ray on Demand service, enabling analog films that are stored at Iron Mountain to be electronically scanned, digitized and transmitted.
Image on Demand service enabled	Customer has contracted for Image on Demand service, enabling files that are stored at Iron Mountain to be electronically scanned and transmitted.

2.2.13 Adding a Division

A division is a customer-defined organisational unit that may consist of one or more departments. Administrative users that have the **Manage Division permission (Section 2.1.8)** are able to create divisions for companies that are division-enabled.

1. Select **Records Management |Administration | Manage Organisations**. The Manage Organisations screen opens.

2. Select a division-enabled customer. The screen updates to display records management data and links for the customer that you selected.

3. From within the division section of the screen, click the **Create New** link . The Create Division screen opens.

4. Enter a Division ID and a Division Name. The Division ID can be up to 12 alphanumeric characters; the Division Name can be up to 35 alphanumeric characters and can include special characters.

5. Click **Save & Close**, or click **Save & Add Department (Section 2.2.14).** The division you created is displayed on screen.

2.2.14 Adding a Department

A department is a customer-defined subdivision of an organisation. Administrative users that have the **Manage Department permission (Section 2.1.8)** are able to create departments for companies that are department-enabled.

1. Select **Administration | Manage Organisations**. The Manage Organisations screen opens.

2. Select a department-enabled customer. The screen updates to display records management data and links for the customer that you selected.

3. If the customer is division- and department-enabled, select a division.

4. From within the department section of the screen, click the **Create New** link. The Create Department screen opens.

5. Enter a Department ID and a Department Name. The Department ID can be up to 12 alphanumeric characters; the Department Name can be up to 35 alphanumeric characters and can include special characters.

6. Select the Data Format for files stored by this department:

- If files are tracked, click **List files** and select the entry method from the drop-down list.
- If files are not tracked, click **Do not list files**.

7. Click **Save & Close**, or click **Save & Add Department** if you need to add multiple departments within the same division. The department that you created is displayed on screen.

2.3 Organisation Groups

2.3.1 About Organisation Groups

Organisation groups enable system administrators to combine customers, divisions and departments into conceptual groups that simplify the process of managing users.

System administrators first create organization groups from within Iron Mountain Connect Records Management, and then assign users to the organisation group from within the Manage Users selection available on the Iron Mountain Connect homepage.

After a user is assigned to an organisation group, he or she can now view data and perform transactions for any of the organisations that are part of the organisation group.

2.3.2 Creating an Organisation Group

> **NOTE:** Organisation groups are created and managed by system administrators who are Client User Administrators (CUAs). Organisation Group Administrators (OGAs) manage the process of adding users to organisation groups but cannot create or manage the organisation group.

1. Select **Records Management | Administration | Manage Organisation Groups**. The Manage Organisation Groups screen opens. Existing organisation groups are listed in alphanumeric order.
2. Click the **Create Organisation Group** button. The Organisation Group wizard opens.
3. Enter a name and description that identifies the organisation group.
4. Select the customers, divisions and departments that will make up this organisation group:

   - Click the tick box to the left of the customer to select the entire customer. If the customer is division- and/or department-enabled, all divisions and/or departments are also automatically selected.
   - If the customer is division- and/or department-enabled, click ▷ to display the individual divisions and/or departments. Then select individual divisions and/or departments to include in the organisation group.
   - You are able to select both active and inactive organisations. Inactive Organisations display in red.

5. Click **Confirm** to move to the final step in the wizard and review all of the information for this organisation group on a single screen.
6. To change the customers, divisions or departments assigned to the organisation group, click **<Organisation.** You

are returned to the previous screen. Make changes as necessary.

7. When you have reviewed the organisation group, click **Finish**. The organisation group is created and you are returned to the Manage Organisation Groups screen where the organisation group is listed in alphanumeric order.

> **NOTE:** Once you have created the organisation group, you must **assign users to the organisation group**. Use the multi-edit option to **assign multiple users to an organisation group** at one time.

2.3.3 Viewing an Organisation Group

1. Select **Records Management | Administration | Manage Organisation Gr**oups. The Manage Organisation Groups screen opens.
2. Click the **Action** dropdown to the right of the organisation group that you wish to view, and select **View Details**.
3. The Organisations and History tab screens open with the Organisations tab in front.
4. Review the information as necessary.
5. Click the History tab to review the change history for the organisation group, starting with the organisation group's creation and including notations of when customers, divisions and departments were added or removed.
6. Click **Close** to return to the Manage Organisation Groups screen.

2.3.4 Editing an Organisation Group

1. Select **Records Management| Administration | Manage Organisation Groups**. The Manage Organisation Groups screen opens.
2. Click the **Action** dropdown to the right of the organisation group that you wish to edit, and select **Edit**.
3. The Organisations and History tab screens open with the Organisations tab in front.
4. Edit the organisation group:

   - Name
   - Description
   - Select/deselect customers, divisions or departments

5. Click **Save** to save any changes and return to the Manage Organisation Groups screen.

2.3.5 Removing an Organisation Group

Removing **permanently** discards an organisation group; it cannot be recovered.

> **NOTE:** You cannot remove an organisation group that has users assigned to it; you must first remove the users via the **Manage Users** selection available from the Iron Mountain Connect homepage.

1. Select **Records Management| Administration | Manage Organisation Groups**. The Manage Organisation

Groups screen opens.

2. Remove the organisation group:

   a. Click the **Action** dropdown to the right of the organisation group and select **Remove** from the dropdown list.

   OR

   b. Click the **Action** dropdown to the right of the organisation group and select **View.** Next, click the **Remove** button at the bottom of the Organisations or History tab screens.

3. Click **Remove** to confirm that you wish to remove the organisation group. The organisation group is removed and a success message is displayed.

2.3.6 Organisation Group History

The History tab screen displays the organisation group's change history, starting with the organisation group's creation and including notations when changes were made and customers, divisions and departments were added and removed. The History tab screen is not updatable.

Access the History tab screen while viewing or editing an organisation group.

2.3.7 Organisation Group Roles

- **System Administrator/Client User Administrator (CUA):** Create organisation group administrators and standard users within an organisation group.

- **Organisation Group Administrator (OGA)**:
    - Create standard users that belong to an organisation group that the OGA belongs to.
    - Search for and update existing users that belong to an organisation group that the OGA belongs to.
    - Grant new standard users permissions that the OGA has access to.
    - View permissions for standard users that belong to an organisation group that the OGA belongs to.
- **Standard User**: View data and perform transactions for organisations that are part of the organisation group they are assigned to.

2.3.8 Organisation Group Administrators (OGA)

Organisation Group Administrator (OGA) Roles and Responsibilities

An organisation group administrator (OGA) is able to:

- Create standard users that belong to the same organisation group that the OGA belongs to.
- Search for and update existing users that belong to the same organisation group that the OGA belongs to.
- Grant new standard users permissions that the OGA has access to.
- View permissions for standard users that are part of the organisation group that the OGA belongs to.

Organisation Group Administrator (OGA) Permissions

Permissions enable organisation group administrators to view and access workflows in Iron Mountain Connect Records Management. The system administrator must manually set permissions when creating or assigning an OGA.

Grant full permissions or limit the organisation group administrator's permissions as appropriate. As a control mechanism, you can set up an OGAwho has fewer permissions than the standard users in the organisation group. In this case, the organisation group administrator will be able to view the standard user's permissions, but will not be able to change them, and should the standard user's permissions need updating, the CUA for the company will need to make these changes.

Creating an Organisation Group Administrator (OGA)

Only client user administrators (CUA) are able to create organisational group administrators (OGA).

1. Click **Manage Users** from the **My Quick Links** section on the Iron Mountain Connect home page, or access it from the Users portal in the centre section of the screen.
2. Click the **Create User** button. The User Profile screen is displayed.
3. Complete all required fields.
4. From within the Account section of the screen:

   a. Set the role to **Records Management Organisation Group Administrator**.

   b. Select the **Records Management** line of business. This field MUST be selected when using organisation groups.

5. Click **Save**. The user profile is complete; however, you must grant the user system permissions and organisational access to Iron Mountain Connect Records Management functionality.
6. Click the **Records Management Access/Permissions** link to open the Records Management Access/Permissions screen.
   - **AssignPermissions**: Grant the appropriate permissions. Refer to the **Organisation Group Administrator (OGA) Permissions** section above.
   - **AssignOrganisational Access**: Click the tick boxes to assign access to the organisation groups that this OGA will oversee. The OGA will be able to create standard users and assign them to these organisation groups only.
7. Click **Save**. The OGA can now create and manage users for any of the organisations within the organisation group.

2.3.9 Assigning a Standard User to an Organisation Group

Client user administrators (CUA) are able to create and assign standard users to organisation groups, and assign existing users to organisation groups.

Organisation group administrators (OGA) are able to create new standard users and assign existing standard users to the organisation groups that he or she (the OGA) belongs to.

Users that are assigned to an organisation group are able to view data and perform transactions for any of the organisations that are included in the organisation group.

1. Click **Manage Users** from the **My Quick Links** section on the Iron Mountain Connect home page. The User Management screen opens.
2. Create a new user or search for and select an existing Records Management user (links to both).

NOTE: Organisation group administrators (OGA) are able to create and assign NEW users to organisation groups. They cannot assign existing users to organisation groups.

3. From within the Account section of the screen:

    a. Enter a unique username.

    b. Set the role to **Standard User**.

    c. Set the **Password Reset** option:

        • **System-generated**: Leave this field set to System-generated to have Iron Mountain Connect automatically send a Welcome email containing a username, a system-generated temporary password and a login link to the email address on the user profile.

        • **Deselect System-generated**: Deselect System-generated to display the password fields. Manually enter and verify a password, then manually send an email containing the password to the user.

NOTE: If you are updating a user's status from Terminated or Locked Out to Active, Iron Mountain Connect automatically emails the manually-generated password to the email address on the user profile.

    d. If necessary, check the **Basic Records Management** report group to provide access to records management reports.

    e. Select the **Records Management** application.

4. Click **Save**. The user is created; however, you must **grant the user system permissions and organisational access (Section 2.1.7)** to Iron Mountain Connect Records Management functionality.
5. **Assign Permissions**: Grant the appropriate permissions. Refer to **Granting User Permissions (Section 2.1.7)**.

NOTE: Organisation group administrators (OGA) are limited to assigning permissions that they have been granted

access to.

6. Assign **organisational access:**
   a. Click the **To Organisation Group** radio button and select a single organisation group. Organisation groups that you have access to will display in the dropdown list.
   b. Clickto expand the organisation to display the individual customers, divisions and departments.
   c. Select/deselect the appropriate organisations.
7. Click **Save**.

2.3.10 Multi-User Edit: Organisation Group Access

Client User Administrators (CUAs) and Organisation Group Administrators (OGAs) have the time-saving ability to set and/or update organisation groups for multiple standard users at one time.

1. Click **Manage Users** from the My Quick Links section on the Iron Mountain Connect home page. The User Management screen opens.
2. Follow the steps in **Searching for Existing Users (Section 2.1.11)**to bring up a list that includes the users for whom you need to set or change the organisation group.
3. Click the tick boxes to select the users.
4. Click the **Action** button and select **Organisation Group Access**. The Manage Organisation Group Access screen opens.
5. Select the organisation group and click**Confirm>**.

> NOTE: Create organisation groups from within **Records Management | Administration | Manage Organisation Groups**.

6. Confirm the organisation group change for the selected users and click **Submit Request**.
7. A message displays indicating that the confirmation details will be emailed to you. Click **OK**.
8. After the organisation group is updated, you receive a system-generated email confirmation from Iron Mountain Connect Records Management.

> NOTE: You cannot use multi-user edit functionality to update Client User Administrators (CUAs) and Organisation Group Administrators (OGAs).

2.4 Supply Lists

2.4.1 Creating a Supply List

There are two types of supply list available in Iron Mountain Connect Records Management:

- **Default Supply List (Section 2.4.2)**: Includes all supplies available from within Iron Mountain Connect Records Management. It is created and maintained by Iron Mountain and can be used by multiple customers at one time. The supplies associated with this list do not change; therefore, the Supplies tab screen and History tab screen for the default supply list are not functional. The default supply list appears at the top of the collection list in the grey panel.

- **Custom Supply Lists (Section 2.4.3):** A custom supply list assigns specific supplies to a customer so that users creating supply orders are limited to only those supplies on the list. This provides control over the supplies available to users. As an administrator, you create and assign custom supply lists at the customer level; divisions and departments automatically use the list assigned to their parent company.

2.4.2 Using the Default Supply List

Iron Mountain Connect Records Management **automatically** assigns customers to the default supply list when they are created and when they are removed from a custom supply list. There are no additional steps required.

2.4.3 Creating a Custom Supply List

You are able to apply a single custom supply list to all of the customers in your organisation, or apply specific custom supply lists based on the needs of your different customers.

Customers are limited to a single supply list. Customers not assigned to a custom supply list automatically use the default supply list.

1. Select **Records Management | Administration | Manage Supply Lists**. The Manage Supply Lists screen opens. The default supply list is the top list in the grey panel.
2. Click **Create New Supply List**. The Supply List wizard opens to the Choose Customer(s) step.
3. Use the tick boxes to select the customer(s) that will use this supply list.

> **NOTE:** Only customers using the **default** supply list can be assigned to a custom supply list.
>
> To assign a customer that is already using a custom list, you must first remove the customer from the custom list. The customer will automatically be assigned back to the default list and be available for you to select.

4. Click **Choose Supplies**; the Supply List wizard opens to the Choose Supplies step. Iron Mountain Connect Records Management displays images of the most commonly requested supplies.
5. Use the tick boxes to select the supplies that will be available to the customer(s) on this list. The paging functionality at the bottom of the screen enables you to quickly locate the necessary supplies.
6. Click **Confirm Summary** to continue to the Confirmation step in the Supply List wizard.

7. Review the list and the customers assigned to it.

> **NOTE:** Use the back buttons (**<Choose Customer** and **<Choose Supplies)** to return to prior steps in the wizard and modify your selections.

8. Click **Finish** to finalise your list. You are returned to the Manage Supply Lists screen; a success message is displayed and the supply list you created appears on the screen. The list is effective immediately; customers assigned to this list will see only the selected supplies, preventing mistaken orders.

2.4.4 Viewing a Supply List

1. Select **Records Management| Administration | Manage Supply Lists**. The Manage Supply Lists screen opens.

2. Click the **View Supply List** button to the right of the list you wish to view. You are able to view the default Iron Mountain supply list and custom supply lists. The list opens with the Customer tab screen displayed.

3. Click the tabs to view the different screens:

   - **Customer** – customers assigned to the supply list
   - **Supplies** – supplies assigned to the supply list
   - **History** – change history for this supply list, starting with the list's creation and including notations when supplies and customers are added and removed

4. When you have finished viewing the list, click **Close** to return to the Manage Supply Lists screen.

> **NOTE:** The edit and remove functions are available while viewing a custom supply list.

2.4.5 Editing a Custom Supply List

Add and remove customer access to a custom supply list; add and remove the supplies included on the list. The list's history is automatically updated with each change that you make; however, you cannot edit the history.

1. Select **Records Management| Administration | Manage Supply Lists**. The Manage Supply Lists screen opens.

2. Click the **View Supply List** button to the right of the list you wish to edit. The list is displayed with the Customer tab screen open.

3. Click the **Edit** button:

   a. From within the Customer tab, use the tick boxes to select and deselect a customer(s).

   b. From within the Supplies tab, use the tick boxes to select and deselect the supplies that will be available to the customer(s) on this list.

> 📑 **NOTE:** You cannot edit the list's history; the application automatically updates the history with each change you make.

4. When you have finished editing the list, click **Close** to return to the Manage Supply Lists screen.

2.4.6 Removing a Custom Supply List

Removing permanently discards a supply list and its history. Once removed, a supply list cannot be recovered. You are not able to remove the default supply list.

1. Select **Records Management| Administration | Manage Supply Lists**. The Manage Supply Lists screen opens.

2. Remove the list:

- From the Manage Supply List screen, click the **Remove** button to the right of the list you wish to remove.

  OR

- Click the **View Supply List** button on the Manage Supply List screen to open a list. Next, click the **Remove** button from any of the three tab screens.

3. Click **Continue** to confirm that you wish to remove the list. The list is removed and you are returned to the Manage Supply Lists screen.

2.5 Box Templates

2.5.1 About Box Templates

Box templates streamline the data entry process and reduce data entry time. Iron Mountain Connect Records Management utilises two types of box templates:

- Custom box templates
- The Iron Mountain default box template

Custom box templates control which fields are required, which are enabled and which are disabled when a user creates a box record. If your organisation uses custom field labels, they are added and maintained from within the custom box template. System administrators create custom box templates and assign them at the customer level within a company. Individual users are able to further control the enabled and required box entry fields by **customising the screen layout (Section 3.2.4)** during box creation.

The **Iron Mountain default box template** is pre-configured and cannot be modified or removed. Customers that are not assigned to a custom box template automatically use the Iron Mountain default box template.

2.5.2 Iron Mountain Default Box Template

The Iron Mountain default box template contains system-assigned settings that drive data entry for customers not using a custom box template. It cannot be updated or removed. Customers are automatically assigned the default box template when they are created and when they are removed from a custom box template. Multiple customers can be assigned to the default box template at one time.

Viewing the Iron Mountain Default Box Template

Select **Records Management| Administration | Manage Box Template**. The Manage Box Templates screen opens. The Iron Mountain default box template is the first template listed; it is displayed in the grey panel.

1. Click the **View** button to the right of the default template. The default template opens with the Box Fields tab screen displayed.
2. Select a **Customer** from the drop-down list. The customer's records management structure determines whether the Division and Department fields are disabled, enabled and/or required.
3. Click the **Customer** tab to review the customers currently using the Iron Mountain default box template.
4. Click the **History** tab to review the change history for the Iron Mountain default box template, starting with the template's creation and including notations when customers were added or removed.
5. When you have finished viewing the Iron Mountain default box template, click **Close** from within any of the tab screens to return to the Manage Box Templates screen.

2.5.3 Creating a Custom Box Template

Use this selection to create and assign custom box templates that control which fields are required, enabled and disabled and whether custom field labels display when a customer enters boxes to be stored at Iron Mountain. Box templates streamline the data entry process and reduce data entry time. Individual **users** are able to further control the enabled and required box entry fields by **customising the screen layout (Section 3.2.4)** during box creation.

Custom box templates are created and maintained by your system administrator.

The **Iron Mountain default box template** is pre-configured and cannot be modified or removed. Customers that are not assigned to a custom box template automatically use the Iron Mountain default box template.

1. Select Records **Management | Administration | Manage Box Templates**. The Manage Box Templates screen opens. The Iron Mountain Iron Mountain default box template is the top template in the grey panel.
2. Click **Create Box Template**. The Box Template wizard opens to the Choose Customer step.
3. Click the checkbox to the left of the customer that will use this box template. You are able to assign a single customer to a custom box template.

   > **NOTE:** Only customers using the Iron Mountain default box template can be assigned to a custom box template.
   >
   > To assign a customer that is already using a custom box template, you must first remove the customer from

> the custom template. The customer will automatically be assigned back to the default template and be available for you to select.

4. **Set the box template fields (Section 2.5.4)**.

📄 **NOTE:** Use the back buttons (**<Choose Customer** and **<Box Fields)** to return to prior steps in the wizard and modify your selections.

5. [Add custom field labels](#) so that your users see labels that more closely reflect the way that your organisation uses specific fields.
6. Review the settings.
7. Click **Finish** to finalise your custom box template. You are returned to the Manage Box Templates screen; a success message displays and the custom box template you created appears on the screen. The template is effective immediately.

📄 **NOTE**: Custom box template settings override the custom layout that individual users are able to create during box entry.

2.5.4 Setting Custom Box Template Fields and Adding Custom Field Labels

Select which fields will be required, enabled and disabled on the Box Detail screen when the customer creates a box that will be stored at Iron Mountain. If your organisation uses custom field labels, add and maintain them from within the custom box template. Please see **Creating a Custom Box Template (Section 2.5.3)** for the complete steps required to create a custom box template.

1. Click **Box Fields>**; you are taken to the Box Fields step in the wizard.
2. Select the **Key Identifier** from the dropdown list. The Key Identifier that you set here is used to identify records when they are displayed on the Box Details screens, the Item and the Details steps of the retrieval order Cart, on order confirmation emails and within the Track Orders selection.
3. Use the checkboxes to control which fields are required, enabled and disabled on the Box Detail screen when this customer creates a box. If the customer is division- or department-enabled, there are required fields that cannot be changed.

How Box Template Settings Drive Box Entry Fields		
Field	**Setting**	**Functionality**
Enabled		Displays as an optional entry field on Box Details screen. User is able to use Customise Layout functionality to enable and require enabled fields.
Required	Automatically checks Enabled	Displays as a required entry field on Box Detail screen. User cannot use the Customise Layout functionality to change this setting.

Disabled	**Neither**Enabled or Required is checked	Does not display on Box Details screen or on the Customise Layout screen. If a field is disabled AFTER the box is received at Iron Mountain, users will be able to view the field, however, they will not be able to add to or modify it.

4. If your company uses custom field labels, the Custom Label column displays on the right side of the screen. Enter meaningful custom field labels. Each label can be up to 30 alphanumeric characters in length. Please see **About Custom Field Labels** for information on which fields are customisable and which template takes precedence.

> **NOTE:** If you leave a custom field label blank, the Iron Mountain Connect Records Management default field label displays.

5. To apply the custom labels that you entered to ALL of your company's custom templates, click the **ALL Custom Box Templates** checkbox. This time-saving feature automatically applies the custom field labels to all of your company's custom templates.
6. Click **Confirm>** to continue to the Confirmation step in the Box Template wizard.

> **NOTE:** Use the back buttons (**<Choose Customer** and **<Box Fields)** to return to prior steps in the wizard and modify your selections.

2.5.5 Viewing a Custom Box Template

> **NOTE:** The edit and remove functions are available while viewing a custom box template.

1. Select **Records Management | Administration | Manage Box Templates**. The Manage Box Templates screen opens.

2. Click the template name or select **View** from the **Action** dropdown to the right of the box. The box template opens with the Box Fields tab screen displayed.

3. Click the tabs to view the different screens:

- **Box Fields** – displays the required, enabled and disabled fields, and the custom field labels if used
- **History** – change history for this custom box template, starting with the template's creation and including notations when changes were made and by whom

4. When you are finished viewing the custom box template, click **Close** to return to the Manage Box Templates screen.

2.5.6 Editing a Custom Box Template

Change the field settings on an existing custom box template. The template's history is automatically updated with each change that you make; however, you cannot edit the history.

1. Select **Records Management| Administration | Manage Box Templates**. The Manage Box Templates screen opens.

2. Edit the custom box template:

> a. Click the **Action** dropdown to the right of the box and select **Edit** from the dropdown list.
>
> > OR
>
> b. Click the **Action** dropdown to the right of the box and select **View.** Next, click the **Edit** button at the bottom of either the Box Field tab screen or the History tab screen.

3. Update the field settings (Box Fields tab screen) on the box template as necessary:

> a. Select a different **Key Identifier**.
> b. Use the checkboxes to update the box template field settings.
> c. Edit custom field labels if used.

> 📋 **NOTE:** You cannot edit the history; Iron Mountain Connect Records Management automatically updates the history with each change that you make.

4. When you are finished editing the custom box template, click **Save.**

5. Click **Close** to return to the Manage Box Templates screen. The changes to the template are effective immediately.

2.5.7 Removing a Custom Box Template

Removing permanently discards a custom box template and its history. Any custom field labels are removed and no longer display in the application. Once removed, you are not able to recover the template.

> 📋 **NOTE:** The Iron Mountain default box template cannot be removed.

1. Select **Records Management| Administration | Manage Box Template**. The Manage Box Templates screen opens.

2. Remove the custom box template:

> a. Click the **Action** dropdown to the right of the box and select **Remove** from the dropdown list.
>
> > OR
>
> b. Click the **Action** dropdown to the right of the box and select **View.** Next, click the **Remove** button at the bottom of either the Box Fields tab screen or the History tab screen.

3. Click **Remove** to confirm that you wish to remove the custom box template. The template is removed, a success message is displayed and you are returned to the Manage Box Template screen.

2.5.8 Box Template History

The History tab screen is available for custom box templates and for the Iron Mountain default box template. It displays the change history for the box template, starting with the template's creation and including notations when changes were made, when custom field labels were added, updated or removed and when customers were added or removed. The History tab screen is not updatable.

1. To access the History tab screen, select Records **Management | Administration | Manage Box Templates**. The Manage Box Templates screen opens.
2. Click the template name, click the **View** button to the right of the Iron Mountain default box template, or click any of the **Action** dropdowns to the right of the custom box templates.
3. Click the History tab at the top of the screen to bring it to the front.

2.6 File Templates

2.6.1 About File Templates

File templates streamline the data entry process and reduce data entry time. Iron Mountain Connect Records Management utilises two types of file templates:

- Custom file templates
- The Iron Mountain default file template

Custom file templates control which fields are required, which are enabled and which are disabled when a user creates a file record. If your organisation uses custom field labels, they are added and maintained from within the custom file template. System administrators create custom file templates and assign them at the customer, division and department levels within a **company**. Individual **users** are able to further control the enabled and required file entry fields by **customising the screen layout (Section 3.3.5)** during file creation.

The **Iron Mountain default file template** is pre-configured and cannot be modified or removed. Customers that are not assigned to a custom file template automatically use the Iron Mountain default file template.

File Template Rules

Naming:

- You must give a unique name to each custom file template that you assign to the same customer.
- Custom file templates assigned to **different** customers can use the same name.

Assigning:

- File templates are assigned at the customer, division and/or department levels.
- Assigning a custom file template to a division and/or department already using a custom file template overwrites and replaces the original file template.

- Assigning a custom file template to a division or department that was already using the default file template replaces the default file template.

Removing:

- You are able to remove active and inactive custom file templates.
- You are not able to remove the Iron Mountain default file template.

Status:

- Custom file templates assigned to at least one customer, division or department are **active**. Active templates display in BLUE on the Manage File Templates screen.
- Templates become **inactive** when all customers, divisions and/or departments are removed. Inactive templates display in GREY on the Manage File Templates screen and cannot be viewed or edited, only removed.

2.6.2 Iron Mountain Default File Template

The Iron Mountain default file template is a preconfigured template that comes with Iron Mountain Connect Records Management and drives data entry for customers not using a custom file template. The Iron Mountain default file template cannot be removed. Customers are automatically assigned to the default file template:

- At creation
- When they are removed from a custom file template

The field settings on the Iron Mountain default file template cannot be edited. The File Description 1 (the key identifier) field is required; all other fields on the Iron Mountain default file template are enabled.

Multiple customers can be assigned to the default Iron Mountain file template at one time.

If you assign file templates at the division and/or department levels, a customer can be assigned to the default template and to one or more custom templates at the same time. However, once a division or department is assigned to a custom file template, that division or department (not the customer) is automatically removed from the default Iron Mountain file template.

Viewing the Iron Mountain Default File Template

Select **Records Management| Administration | Manage File Template**. The Manage File Templates screen opens. The Iron Mountain default file template is the first template listed; it is displayed in the grey panel.

1. Click the **template name** or click the **View** button to the right of the Iron Mountain default template. The Iron Mountain default template opens with the File Fields tab screen displayed. You are not able to update the field settings on the Iron Mountain default file template.
2. Click the Organisations tab to review the customers, divisions and departments currently assigned to the Iron Mountain default file template. If you do not see all of the organisations that you believe should be displayed on this tab, refer to **Organisations Missing from Custom File Templates (Section 2.6.11).**

3. Click the History tab to review the change history for the Iron Mountain default file template; the history is updated when a custom template is removed and the customer is restored to the Iron Mountain default template.
4. When you have finished viewing the Iron Mountain default file template, click **Close** from within any of the tab screens to return to the Manage File Templates screen.

2.6.3 Creating a Custom File Template

1. Select **Records Management | Administration | Manage File Templates**. The Manage File Templates screen opens. Existing templates are listed; the Iron Mountain default file template is the top template in the grey panel.

    > **NOTE:** Please see **Using the Manage File Template Screen (Section 2.6.9)** for information about filtering and displaying templates on this screen.

2. Click **Create File Template**. The File Template wizard opens to the **Choose Customer** step.
3. Select the customer that will use this file template by clicking the checkbox to the left of any of the customers that are listed.

    > **NOTE:** A customer can have multiple custom file templates; however, each division and/or department can only be assigned to one custom file template.
    >
    > Assigning a custom file template to a division or department that was already using a custom file template overwrites and replaces the original file template. Assigning a custom file template to a division or department that was already using the default template replaces the default file template. Removing all divisions and departments from a custom file template, makes the template inactive.
    >
    > None of these actions permanently **removes (Section 2.6.8)** a custom file template.

4. Click **Assign Organisations>**. The Assign Organisations step in the File Template wizard is where you assign divisions and departments to the file template. The screen layout and process for assigning organisations varies based on the customer's account profile settings:
    a. If the **customer does not validate departments**, there are no divisions or departments to assign. Continue to step 5 to customise the fields on the template.
    b. If the **customer is not division-enabled**, only departments display. Click the checkbox to the left of a department to add it to the custom file template. Please see **Assigning a File Template (Section 2.6.12)** to learn how to quickly add, remove and display divisions and departments in the Selector and Selected For list.
    c. If the **customer is division- and department-enabled**, both divisions and departments display. Select a division to view the departments within that division; click the checkbox to the left of a department to add it to the custom file template. Refer to Assigning a File Template to learn how to quickly add, remove and display divisions and departments in the Selector and Selected For list.

    > **NOTE:** Each division and department can be assigned to one file template at a time. Selecting a division or department that is already assigned to a file template removes that division or department from the **original** file template and adds it to the **new** file template.

5. Click **Customise Fields>** and **set the custom file template fields (Section 2.6.4)** that will be required, enabled and disabled on the File Detail screen when this customer creates a file. If the customer is division- or department-enabled, there are required fields that cannot be changed.
6. **Add custom field labels** so that your users see labels that more closely reflect the way that your organisation uses specific fields**.**
7. Click **Confirm>** to continue to the Confirmation step in the File Template wizard.

> **NOTE:** Use the back buttons (<Choose Customer, <Assign Organisations> and <Customise Fields>) to return to prior steps in the wizard and modify your selections.

8. Review the settings.
9. Click **Finish** to finalise your custom file template. You are returned to the Manage File Templates screen; a success message displays and the custom file template you created appears on the screen. The template is effective immediately.

> **NOTE**: Custom file template settings override the custom layout that individual users are able to create during file entry.

2.6.4 Setting File Template Fields and Adding Custom Field Labels

Select which fields will be required, enabled and disabled on the File Detail screen when the customer creates a file that will be stored at Iron Mountain.

1. Enter a descriptive **name** that identifies this custom file template.
2. Select the **Key Identifier** from the dropdown list. The Key Identifier that you set is used to identify records when they are displayed on the File Details screens, the Items step and the Details step in the retrieval order Cart, on order confirmation emails and within the Track Orders selection.

> **NOTE:** You are able to set SKP Barcode as a Key Identifier on a file, however, it does not display as a field that you can require, enable or disable because it defaults from the box record when a file is created.

3. To clone an existing template and use the file selections set on that template, refer to **Cloning a Custom File Template. (Section 2.6.5)**
4. Click the checkboxes to control which fields are required, enabled and disabled on the File Detail screen when this customer creates a file. If the customer is division- or department-enabled, there are required fields that cannot be changed.

How File Template Settings Drive File Entry Fields		
Field	**Setting**	**Functionality**
Enabled		Displays as an optional entry field on File Details screen. User is able to use Customise Layout functionality to enable and require

		enabled fields.
Required	Automatically checks Enabled	Displays as a required entry field on File Detail screen. User cannot use the Customise Layout functionality to change this setting.
Disabled	**Neither** Enabled or Required is checked	Does not display on File Details screen or on the Customise Layout screen. If a field is disabled AFTER the file is received at Iron Mountain, users will be able to view the field, however, they will not be able to add to or modify it.

5. If your organisation uses custom field labels, the Custom Label column displays on the right side of the screen. Enter meaningful custom field labels. Each label can be up to 30 alphanumeric characters in length. Please see **About Custom Field Labels** for information on which fields are customisable and which template takes precedence.

2.6.5 Cloning a Custom File Template

Cloning a custom file template is a time-saving feature that enables you to create a new template that copies and reuses field settings from an existing custom file template. Follow the steps below to clone a custom file template:

1. Create the template. Follow steps 1-5 in **Creating a Custom File Template (Section 2.6.3)**.
2. Enter a descriptive **name** that identifies the custom file template you are **creating**.
3. Select the **Key Identifier** from the dropdown list. The Key Identifier that you set is used to identify records when they are displayed on the File Details screens, the Items step and the Details step in the retrieval order Cart, on order confirmation emails and within the Track Orders selection.
4. Select the custom file template to be cloned. The **field settings (Section 2.6.4)** from the source template are copied.
5. If necessary, click the checkboxes to select or unselect and change any field settings. If the customer is division- or department-enabled, there are required fields that cannot be changed.
6. Update custom field labels if used.
7. Click **Confirm>** to continue to the Confirmation step in the File Template wizard.

   📋 **NOTE:** Use the back buttons (<Choose Customer, <Assign Organisations> and <Customise Fields>) to return to prior steps in the wizard and modify your selections.

8. Review the settings.
9. Click **Finish** to finalise your custom file template. You are returned to the Manage File Templates screen; a success message displays and the custom file template you created appears on the screen. The template is effective immediately.

   📋 **NOTE**: Custom file template settings override the custom layout that individual users are able to create during file entry.

2.6.6 Viewing a Custom File Template

📋 **NOTE:** The edit and remove functions are available while viewing a custom file template.

1. Select **Records Management| Administration | Manage File Templates**. The Manage File Templates screen opens.
2. Click the template name or select **View** from the **Action** dropdown to the right of the file. The file template opens with the File Fields tab screen displayed.
3. Click the tabs to view the different screens:

    - **File Fields tab:** Displays the required, enabled and disabled fields, as well as custom field labels if used
    - **Organisations tab:** List of the customers, divisions and departments assigned to the file template
    - **History tab:** Change history for the custom file template, starting with the template's creation and including notations when changes were made and by whom

4. When you are finished viewing the custom file template, click **Close** to return to the Manage File Templates screen.

2.6.7 Editing a Custom File Template

Change the field settings on an **existing** custom file template and edit any custom field labels. The template's history is automatically updated with each change that you make; however, you cannot edit the history.

1. Select **Records Management | Administration | Manage File Templates**. The Manage File Templates screen opens.
2. Click the **Action** dropdown to the right of the file and select **Edit** from the dropdown list.

📋 **NOTE:** Edit functionality is also available while viewing a custom file template. Click the Edit button at the bottom of the File Fields, Organisation or History tab screens while in View mode.

3. Update the field settings (File Fields tab screen) on the file template as necessary:
    a. Change the template's name.
    b. Select a different Key Identifier.
    c. Use the checkboxes to **update the custom file template field settings**.
    d. Edit custom field labels if used.
4. Update the organisations (Organisations tab screen) that will use the custom file template. The screen layout and process for assigning organisations varies based on the customer's account profile settings:
    a. If the **customer does not validate departments**, there are no divisions or departments to assign.
    b. If the **customer is not division-enabled**, only departments display. Click the checkbox to the left of a department to add it to the custom file template. Please see **Assigning Organisations to a File Template (Section 2.6.12)** to learn how to quickly add, remove and display divisions and departments in the Selector and in the Selected For list.

c. If the **customer is division- and department-enabled**, both divisions and departments display. Select a division to view the departments within that division; click the checkbox to the left of a department to add it to the custom file template. Please see **Assigning Organisations to a File Template (Section 2.6.12)** to learn how to quickly add, remove and display divisions and departments in the Selector and in the Selected For list.

> **NOTE:** Each division and department can be assigned to one file template at a time. Selecting a division or department that is already assigned to a file template removes that division or department from the **original** file template and adds it to the **new** file template.

5. You cannot edit the file template history; Iron Mountain Connect Records Management automatically updates the history with each change that you make.
6. Click **Save** when you are finished editing the custom file template.
7. Click **Close** to return to the Manage File Templates screen. The changes to the file template are effective immediately.

2.6.8 Removing a Custom File Template

Removing **permanently** discards a custom file template; it cannot be recovered.

The customer, divisions and/or departments that were assigned to the custom file template are reassigned to the Iron Mountain default file template and the Iron Mountain default file template's history is updated.

> **NOTE:** The Iron Mountain default file template cannot be removed.

1. Select **Records Management | Administration | Manage File Template**. The Manage File Templates screen opens.
2. Remove the custom file template:

    *   Click the Action dropdown to the right of the file template and select Remove from the dropdown list OR

            OR

    *   Click the Action dropdown to the right of the file template and select View. Next, click the Remove button at the bottom of the File Fields, Organisation or History tab screens.

3. Click **Remove** to confirm that you wish to remove the custom file template. The template is removed, a success message is displayed, the DEFAULT file template history is updated to indicate that the customer was restored to the Iron Mountain default template, and you are returned to the Manage File Template screen.

2.6.9 Using the Manage File Templates Screen

The Manage File Templates screen displays a list of all active and inactive file templates, and includes functionality for you to create, view, edit and remove file templates.

- **Order:** The Iron Mountain default file template is displayed at the top of the list in a grey panel. Each custom file template is listed beneath the Iron Mountain default file template in alphanumeric order.
- **Column filters** enable you to quickly search by template name, customer, division or department.
- Click the **>more** link to see the complete list of customers, divisions or departments assigned to a file template.

Why Can't I Find a File Template?

A custom file template may not be listed on the Manage File Templates screen for the following reasons:

- You do not have COMPLETE organisational access. You may only have access to select divisions and/or departments. All active custom file templates *for customers to whom you have COMPLETE organisational access* are displayed on the Manage File Templates screen. Organisational access is granted by your system administrator.
- It has been permanently **removed (Section 2.6.8)** from the application.

Why Can't I Find/Assign a Customer, Division or Department?

Not all customers, divisions or departments are available to be assigned **when you create a custom file template**. A customer, division or department may not be displayed in the Assign Organisations step of the File Template wizard for the following reasons:

- The customer is not set up within Iron Mountain Connect Records Management to individually list files.
- Your organisational access is restricted; only customers to whom you have complete organisational access (access to all divisions and/or departments) are displayed. Organisational access is granted by your system administrator.
- Divisions and departments are not displayed if the customer does not validate departments.

A customer, division or department may not be displayed on the Organisation tab screen when you **view or edit a custom file template** for the following reasons:

- The customer is not set up within Iron Mountain Connect Records Management to individually list files.
- Your organisational access is restricted; only customers to whom you have complete organisational access (access to all divisions and/or departments) are displayed. Organisational access is granted by your system administrator.
- Divisions and departments are not displayed if the customer does not validate departments.
- You are viewing the Iron Mountain default file template and the customer, division or department is assigned to a custom file template.
- You are viewing the Iron Mountain default file template and the customer, division or department is assigned to a custom file template.

2.6.10 Missing Custom File Templates

A custom file template may not be listed on the Manage File Templates screen for the following reasons:

- You do not have COMPLETE organisational access. You may only have access to select divisions and/or departments. All active custom file templates *for customers to whom you have COMPLETE organisational access* are displayed on the Manage File Templates screen. Organisational access is granted by your system administrator.
- It has been permanently **removed (Section 2.6.8)** from the application.

2.6.11 Organisations Missing from Custom File Templates

Not all customers, divisions or departments are available to be assigned **when you create a custom file template**. A customer, division or department may not be displayed in the Assign Organisations step of the File Template wizard for the following reasons:

- The customer is not set up within Iron Mountain Connect Records Management to individually list files.
- Your organisational access is restricted; only customers to whom you have complete organisational access (access to all divisions and/or departments) are displayed. Organisational access is granted by your system administrator.
- Divisions and departments are not displayed if the customer does not validate departments.

A customer, division or department may not be displayed on the Organisation tab screen when you **view or edit a custom file template** for the following reasons:

- The customer is not set up within Iron Mountain Connect Records Management to individually list files.
- Your organisational access is restricted; only customers to whom you have complete organisational access (access to all divisions and/or departments) are displayed. Organisational access is granted by your system administrator.
- Divisions and departments are not displayed if the customer does not validate departments.
- You are viewing the Iron Mountain default file template and the customer, division or department is assigned to a custom file template.
- You are viewing the Iron Mountain default file template and the customer, division or department is assigned to a custom file template.

2.6.12 Assigning a File Template

Use the following shortcuts when assigning organisations to or removing organisations from a file template:

Click/Select	From	Functionality
All (customers that are division- and department-enabled)	Division list in the Selector area (upper half of screen)	Works in conjunction with the All Divisions and all Departments tick box to automatically add all divisions and the departments within each division to the Selected For list. Once selected, you are able to remove individual divisions or departments
All (customers	Department list in the Selector	Automatically add all departments within

that validate departments)		a division to the Selected For list. Once selected, you are able to remove individual departments
All Divisions and all Departments	Department list in the Selector area (upper half of screen) if All was selected from the Division list	Works in conjunction with the All selection in the Division list to automatically add all divisions and the departments within each division to the Selected For list. Once selected, you are able to remove individual divisions or departments
▷	Selected For List (lower half of screen)	Display only the top level division or department
◢	Selected For List	Display all departments included in the Selected For list
Expand All link	Top right of Selected For List	Fully display all selected divisions and departments
Collapse All link	Top right of Selected For List	Display only the division level selections
⊖	To the right of the UPPERMOST (customer) level of Selected For List	Remove ALL selected divisions and ALL departments
⊖	To the right of a DIVISION level	Remove the division and ALL departments within it
⊖	To the right of an individual DEPARTMENT level	Remove ONLY that department

2.6.13 File Template History

Iron Mountain Connect Records Management tracks the change history for all file templates (custom file templates and the Iron Mountain default file template). The history starts with the template's creation and includes notations for changes to the field settings and to the organisations assigned to the template, as well as when custom field labels were added, updated or removed. Each change to the field settings and organisations is noted with a separate entry. When an organisation is added or removed, the Action Details column includes the customer, division and department that changed.

To access the History tab screen, click on the template name, click the **View** button to the right of the Iron Mountain default file template or click any of the **Action** dropdowns to the right of the custom file templates, then click the History tab at the top of the screen to bring it to the front.

2.7 Custom Field Labels

2.7.1 About Custom Field Labels

Custom field labels replace the default (system-assigned) Iron Mountain Connect Records Management labels. As the system administrator, you assign meaningful labels that match the way your organisation uses a specific field. This enables you to easily repurpose a field and make the user interface more intuitive.

For example, your organisation uses the File Description fields to capture insurance provider information. You are able to add a custom field label that changes File Description 8 to Insurance Provider ID and another that changes File Description 9 to Employee Group Number.

Add and manage custom field labels from within custom box templates and custom file templates. Once created, custom field labels automatically display the next time users log in.

Each time you create, update or remove a custom field label, the change history on the custom box template is updated.

Assign custom field labels to the following fields:

BOX FIELDS

- Division* (if customer is division- and department-enabled)
- Department* (if customer is division and/or department-enabled)
- Alpha From*
- Alpha To *
- Major Description
- Long Description
- Minor Description
- Reference 1
- Record Code*
- Hold Code

* Customisable on both boxes and files; custom box label takes precedence

> 📝 **NOTE:** Division and Department also display as Bill To Division and Bill To Department. Customising Division or Department also customises Bill To Division and Bill To Department.

FILE FIELDS

- Division* (if customer is division- and department-enabled)
- Department* (if customer is division and/or department-enabled)
- Volume Number
- Social Security Number
- Birth Date

- Alpha From*
- Discharge Date
- Alpha To *
- Description 1
- Description 2
- Description 3
- Description 4
- Description 5
- Description 6
- Description 7
- Description 8
- Description 9
- Record Code*
- Type

* Customisable on both boxes and files; custom box label takes precedence

> 📝 **NOTE:** Division and Department also display as Bill To Division and Bill To Department. Customising Division or Department also customises Bill To Division and Bill To Department.

2.7.2 Adding Custom Field Labels to a Box

If your organisation is set up to use custom box field labels, you add and maintain them from within custom box templates.

(Section 2.5.3)
1. **Create a new custom box template (Section 2.5.3)** or **edit an existing custom box template (Section 2.5.6)**.
2. Add custom field labels from within the Box Fields step in the custom box template wizard.
3. Select the **Key Identifier** and set the enabled, required and disabled fields.
4. The Custom Label column displays on the right side of the screen. Enter meaningful custom field labels. Each label can be up to 30 alphanumeric characters in length. Please see **About Custom Field Labels** for information on which fields are customisable and which template takes precedence.

> 📝 **NOTE:** If you leave a custom field label blank, the Iron Mountain Connect Records Management default field label displays.

5. To apply the custom labels that you entered to ALL of your company's custom templates, click the **ALL Custom Box Templates** checkbox. This time-saving feature automatically applies the custom field labels to all of your company's custom templates.
6. When you have finished entering custom field labels, click **Confirm>** and **Finish** to save and apply the labels to a new custom box template, or **Save** if you are adding the labels to an existing custom box template.
7. The custom box field labels will be visible the next time users log in to Iron Mountain Connect Records

Management.

2.7.3 Adding Custom Field Labels to a File

If your organisation is set up to use custom file field labels, you add and maintain them from within custom file templates.

(Section 2.5.3)
1. **Create a new custom file template (Section 2.6.3)** or **edit an existing custom file template (Section 2.6.7)**.
2. Add custom field labels from within the Customise Fields step in the custom file template wizard.
3. Enter a name for the template, select the **Key Identifier** and set the enabled, required and disabled fields.
4. The Custom Label column displays on the right side of the screen. Enter meaningful custom field labels. Each label can be up to 30 alphanumeric characters in length. Please see **About Custom Field Labels** for information on which fields are customisable and which template takes precedence.

> **NOTE:** If you leave a custom field label blank, the Iron Mountain Connect Records Management default field label displays.

5. When you have finished entering custom field labels, click **Confirm>** and **Finish** to save and apply the labels to a new custom file template, or **Save** if you are adding the labels to an existing custom file template.
6. The custom file field labels will be visible the next time users log in to Iron Mountain Connect Records Management.

2.7.4 Removing Custom Field Labels

Remove custom field labels from within the appropriate custom box or file template.

1. Click the x at the far right of the custom field label. Your entry is cleared.
2. Click **Save**.
3. Your change will be visible the next time users log in to Iron Mountain Connect Records Management.

2.7.5 Displaying Custom Field Labels on Grid Screens and Exports

The grid label preferences enable you to control the labels displayed in the following screens:

- Search Results
- Pickup List

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.
2. Select **Grid Label Preferences** from the **Search Tools** dropdown located at the top of the left-side search bar. The

Grid Label Preferences screen opens. The first time you access this screen, the grid label preferences are set to show the default labels.

3. If you need to change the grid labels for box-related column labels, you will use the upper portion of this screen:

   a. Click the **Custom Labels** radio button near the top of the screen.

   b. Select the customer the custom labels will display for.

   c. A sample grid showing the custom labels for the customer displays.

4. If you need to change the grid labels for file-related column labels, you will use the lower portion of this screen:

   a. Click the **Custom Labels** radio button near the middle of the screen.

   b. Select the customer, division (if division-enabled) and department (if division- and department-enabled) that the custom labels will display for.

   c. A sample grid showing the custom labels for the customer, division and department displays.

5. Click **Save**. The grid label preferences are saved and now display when you access the Search Results and Pickup List screens, as well as on exports from both of these screens.

2.7.6 Why Do I See Fields That Are Not in the Documentation

The online help and documentation provided by Iron Mountain refer to the default field labels provided with the application.

If your organisation uses custom field labels, different labels will display in the application than those referred to in the online help and documentation.

Custom field labels replace the default (system-assigned) Iron Mountain Connect Records Management labels and enable your organisation to repurpose a field and create a more intuitive user interface.

Custom field labels appear on screens throughout the application, including but not limited to:

- Left-Side Search Bar
- Advanced Search
- Box Details
- File Details
- Search Results (must set grid label preferences to Custom)
- Pickup List (must set grid label preferences to Custom)
- Customise Box/File Entry Layout
- Cart Items (all order types)
- Cart Details (all order types)

Custom field labels are added and maintained by your system administrator. Please direct questions concerning these field labels to your system administrator.

2.8 Shipping Addresses

2.8.1 Shipping Address FAQ for Migrated Companies and Users

Iron Mountain Connect Records Management replaced Record Centre's personal address book with an improved centralised address functionality that system administrators control. This topic is targeted at system administrators and users at companies that migrated from Record Centre and previously used personal address books.

Where Can I Find My Personal Address Book?

- Personal address books have been removed.
- System administrators now create, edit and enable/disable user access to addresses from within **Administration | Manage Addresses**.
- Users review and select an address from within the Details step in the order wizard.
- Users with the proper permissions are able to create addresses while placing orders.
    - Once an address is created, it is available for use and can be set as a default address or favourite address by a user for ease of use.

Why Was Address Functionality Changed?

- Multiple address repositories led to inconsistency and errors.
- One centralised repository means addresses are synchronised SYSTEM-WIDE.
- Default and favourite addresses automate processes and eliminate errors.
- Simpler workflow.
- Less time spent looking up and copying addresses to the personal address book.

Where Can I Find the New Address Functionality?

- **System Administrators**: System administrators now create, remove, edit and enable user access to shipping addresses from within **Records Management |Administration | Manage Addresses**.
- **Users**:
    - Users click the **Change Address** link on any of the order detail screens to open the Shipping Address List screen.
    - From within the Shipping Address List screen, users view and edit addresses and set default and favourite addresses.
    - Users with the proper permissions see the **Add Address** button on the Shipping Address List screen and are able to create addresses while placing orders.
        - Once an address is created, it is available for users to select when placing an order. Users can **set an address as a default or favourite address (Section 3.1.1)**.

What Should I Do If I Cannot Find an Address that was in Record Centre?

If you cannot find an address that existed in a personal address book in Record Centre:

- **Apply column filters**to reduce the number of addresses displayed.
- If applying filters does not find the address and you are a system administrator or a user with permission to create addresses, **create the address (Section 2.8.3).**

Which Users Have Access to a Shipping Address?

By default, ALL NEW USERS have access to ALL ADDRESSES belonging to a customer UNLESS the system administrator restricts access by manually deselecting the user during the **Choose User (Section 2.8.5)** step in the Address wizard.

- **Migrated Users**:
  - Migrated Record Centre users that have permission to create and edit or copy shipping addresses have access to all addresses for a customer. As the system administrator, you must review the addresses and manually deselect users that should not have access.
  - Migrated Record Centre users that do <u>not</u> have permission to create and edit or copy shipping addresses only have access to validated addresses from their Record Centre personal address book.

- **New Users**: New users that you create also have access to all addresses until you review the address and manually deselect the user.
- **New Addresses**: When you create a new address, all users for the company automatically have access to the address until you review the address and manually deselect users.

What If Outdated Shipping Addresses Are Displayed?

As a system administrator, if outdated addresses are displayed you have two options:

- **Edit the address** and **unassign all users (Section 2.8.5)** associated with it. The address remains in Iron Mountain Connect Records Management, however, users no longer see the outdated address.
- **Remove the address (Section 2.8.7)**. Be aware that removing an address will permanently delete the address. No backup or audit records will be supplied.

Can Users Create Addresses?

System administrators can **give users the permission to create shipping addresses (Section 2.8.9)** on the fly while placing an order. Users that can create a shipping address can also assign and remove users to/from shipping addresses.

Addresses created on the fly by a user are available to all users within the company.

> **NOTE:** Users can create and edit addresses, however, only system administrators are able to remove addresses.

2.8.2 Searching for an Existing Shipping Address

Applying column filters reduces the number of addresses that are displayed and helps you find an existing shipping

address.

1. Select **Records Management |Administration | Manage Addresses**.

   > **NOTE:** These steps can also be used to find an address from within the Shipping Address List screen when placing an order.

2. Select a customer.
3. Enter a keyword from the address in one or more of the column filter fields.
4. Click **Filter**. Addresses that match your criteria are displayed.

If filtering does not find the address, **create the address**.

2.8.3 Creating a Shipping Address

Shipping addresses are the location where supply and retrieval orders are delivered and where collection orders are picked up.

1. Select **Records Management | Administration | Manage Addresses**. The Manage Addresses screen opens.
2. Click the **Choose Customer** dropdown and select the customer for whom you are creating the address. Existing addresses that belong to this customer are displayed on screen.
3. Click the **Add Address** button. The address wizard opens.
4. **Enter shipping address details**. Complete all required fields. A complete and accurate shipping address is required for delivery and collection:
   - **Deliver To Code**:Assign a unique **Ship To Code** of up to 7 alphanumeric characters that represents this address. This code cannot be edited after the address has been saved.
   - **Contact Information**: Enter the name and number of the person who should be contacted with questions about the address.
5. **Review the assigned users** who will have access to the addresswhen placing an order. All users are automatically assigned when you create a new address. Manually unassign users that should not have access.
   - **Individual Users**: Click the tick box to the left of the username to assign and unassign individual users.
   - **All Users**: Click the **Assign All Users** and **Unassign All Users** links or the tick box at the top of the list to update the list in bulk without having to individually select users.
6. Click **Confirm** to review all of the information for this address on a single screen.

   > **NOTE:** Click the <**Choose Users** and **<Address Details** buttons to return to prior steps in the wizard and modify your selections.

7. Click **Finish**. The address is created and you are returned to the Manage Address screen where the address is now displayed. Users that belong to the customer can now select this address when placing an order.

   > **NOTE:**As a system administrator, you can give users the permission to create and edit addresses on the fly while placing an order. Refer to **Giving Users the Ability to Create a Shipping Address (Section 2.8.9)**.

2.8.4 Entering Shipping Address Details

Enter detailed information about this shipping address. You must complete all required fields. A complete and accurate shipping address is required for delivery and collection.

1. Assign a unique **Ship To Code** of up to 7 alphanumeric characters that represents this address. This code cannot be edited after the address has been saved.
2. Enter the **Company Name** and **Address**. For companies in the United States and Canada, Iron Mountain Connect Records Management validates the post code against the city. If the value is not valid, it is corrected and you are prompted to save the changed values.
3. Enter the name and number of the person who should be contacted with questions about the address.

2.8.5 Adding Users to a Shipping Address

Control which users will be able to select this address when placing an order. When you get to this step in the address wizard, all users for the company are automatically assigned. **It is important that you review the address and manually unassign users that should not have access.**

1. Review the users that will have access to the addresswhen placing an order. All users are automatically assigned when you create a new address. Manually unassign users that should not have access.

   - **Individual Users**: Click the tick box to the left of the username to assign and unassign individual users.
   - **All Users**: Click the **Assign All Users** and **Unassign All Users** links or the tick box at the top of the list to update the list in bulk without having to individually select users.

> **NOTE:** When created, users are automatically granted access to all shipping addresses for the customers to which they have access. Use the information in this topic to unassign new users that should not have access to the address.

2.8.6 Viewing a Shipping Address

1. Select **Records Management | Administration | Manage Addresses**. The Manage Addresses screen opens.
2. Select a customer from the Choose Customer drop-down menu. All of the customer's addresses are listed on screen.
3. Click the **Action** drop-down menu to the right of the address you wish to view and select **View**.

4. The Address and User tab screens open with the Address tab in front.
5. Review the information as necessary. Click the tabs to bring the screens to the front.
6. Click **Close** to return to the Manage Address screen.

NOTE: Click **Edit** to make changes to the address.

2.8.7 Removing a Shipping Address

Removing permanently deletes a shipping address for all users that had access to the address.No backup or audit records are supplied. Only system administrators are able to remove addresses.

NOTE: You cannot remove a shipping address that fulfils one or more of the following conditions:

- It is the only address assigned to a user or to this customer
- It has been used on an order within the last 13 months
- It is associated with a recurring order
- It is associated with a shred profile
- It is a department's default Ship To or Attention To address

1. Select **Records Management| Administration | Manage Addresses**. The Manage Addresses screen opens.
2. Select **Remove** from the **Action** dropdown to the right of the shipping address you need to delete.
3. Click **Remove** to confirm that you wish to remove the shipping address. The address is removed from Iron Mountain Connect Records Management, a success message is displayed and you are returned to the Manage Addresses screen.

NOTE: Iron Mountain Connect Records Management is immediately updated when you remove a shipping address. Users who place phone orders rather than using Iron Mountain Connect Records Management may experience a temporary delay before the address is removed.

2.8.8 Editing a Shipping Address

Once an address is created in Iron Mountain Connect Records Management, it remains permanently. You are able to update non-essential fields only.

1. Select **Records Management | Administration | Manage Addresses**. The Manage Addresses screen opens.
2. Select a customer from the **Choose Customer** drop-down menu. All of the customer's addresses are listed on screen.
3. Click the **Action** drop-down to the right of the address you wish to view and select View.
4. The Address and User tab screens open with the Address tab in front.

5. Click **Edit** to update Address information. The following fields are updatable:
   - Company Name
   - Address Line 2
   - Address Line 3
   - Floor
   - Contact Name
   - Contact Phone Number
6. Click the User tab to bring that screen to the front and assign or unassign users.
7. Assign users to the address:
   - Enter one or more letters or numbers and click **Filter** to quickly find all entries that contain those characters. Click **Reset View** to reset all column and filters to their default values.
   - Click the tick box to the left of the username to select and deselect individual users.
   - Use the **Assign All Users** and **Unassign All Users** links or the tick box at the top of the list to update the list in bulk without having to individually select users.
8. Click **Save** to save any changes and return to the Manage Address screen.

2.8.9 Giving Users the Ability to Create a Shipping Address

As a system administrator, you can give users the permission to create and edit addresses (including assigning and unassigning users to the addresses) on the fly while placing an order.

Addresses created on the fly by a user are available to all users within the company.

1. Click **Manage Users** from the **My Quick Links** section on the Iron Mountain Connect home page or from the Userportal in the centre section of the screen. The User Management screen opens.
2. **Search for an existing user (Section 2.1.11)**or **create a new user (Section 2.1.4)**.
3. From within the user profile, click the **Records Management Access/Permissions** link. The System Permissions screen opens.
4. Tick the **Create/edit shipping address** user permission.
5. Click **Save**. The user will now see the **Add Address** button on the Shipping Address List screen and will be able to create a shipping address on the fly while placing an order. Users without this permission will not see this button.

2.8.10 Users: Creating a Shipping Address While Entering an Order

Iron Mountain Connect Records Management enables you to create a new shipping address from within any of the order wizards. Seamlessly apply this new address to the order you are processing and save it in the centralised address repository for future use.

1. From within the Details step of any of the order wizards, click **Change Address.** The Address wizard opens.
2. Click the **Add Address** button.

> 📋 **NOTE:** If you are creating a shipping address from within a retrieval order, select the customer this address applies to from the **Choose Customer** drop-down menu. You will not need to select a customer when creating a shipping address from within a collection or supply order; you selected the customer when you began entering the collection or supply order.

3. **Enter the shipping address details. (Section 2.8.4)**
4. **Select the users (Section 2.8.5)** that will be able to use this shipping address when placing an order.
5. Click **Confirm** to move to the final step in the Address wizard and review the information for this address on a single screen.
    a. To change the users assigned to this address, click **<Choose Users**. You are returned to the previous screen. Make changes as necessary.
    b. To change the address, return to the Choose Users step and click **<Address Details** to return to the Address Details screen. Make changes as necessary.
6. When you have reviewed the address, click **Use This Address**. The address is created and you are returned to the Details step in the order wizard. The address that you created defaults onto the order and is saved in the centralised address repository for future use.

To review the address, refer to **Viewing a Shipping Address (Section 2.8.6)**. To update the address, refer to **Editing a Shipping Address (Section 2.8.8)**.

2.9 Record Codes

2.9.1 Creating a Record Code

Create record codes that your organisation will use to calculate the length of time a record is required to be retained. Record codes are defined at the enterprise, customer and department levels. Enterprise record codes cannot usually be updated.

1. Select **Records Management | Administration | Manage Record Codes**. The Manage Record Codes screen is displayed.
2. Click **Create Record Code**. The New Record Code screen opens.
3. Select a customer from the dropdown list.
4. Determine the organisation level that this record code will apply to:

    - To create a record code that will apply to all divisions (if customer is division-enabled) and departments within the customer, tick the Customer Record Code box. The Division and Department fields are automatically removed when you tick this box.
    - To create a record code that applies only to boxes in a specific division (if customer is division-enabled) and/or department of the customer, select the appropriate division and/or department.

5. Identify the record code by entering a unique alphanumeric character code and an associated title.

6. Your internal retention policies and the way that Iron Mountain Connect Records Management is set up determine your Destruction Eligibility options and whether or not you are able to update them:

   - Fixed Time Period
   - Permanent
   - Undefined
   - Indefinite

7. Click **Save**. The record code is created and you are returned to the Manage Record Codes screen where the code is listed in alphanumeric order, organised by level.

> **NOTE:** Use the column filters to quickly sort and search for record codes.

2.9.2 Viewing a Record Code

- Select **Records Management | Administration | Manage Record Codes**. The Manage Record Codes screen opens.
- Click on the record code or select **View Details** from the **Action** dropdown menu to the right of the code. The record code is displayed with the Record Code Details tab screen open.
- When you have finished viewing the record code, click **Close** to return to the Manage Record Codes screen.

2.9.3 Editing a Record Code

1. Select **Records Management | Administration | Manage Record Codes**. The Manage Record Codes screen opens.
2. Click on the **Action** dropdown menu to the right of the record code and select **Edit** from the dropdown list.

   OR

   Click on the **Action** dropdown menu to the right of the record code and select **View**. Next, click on the **Edit** button at the bottom of the screen.

3. Edit the record code's Title and Destruction Eligibility.
4. When you have finished editing the record code, click **Save**. Your changes are saved and you are returned to the Manage Record Codes screen.

2.10 Hold Codes

2.10.1 Creating a Hold Code

Create Hold codes that override the retention fields on a box and prevent record destruction when necessary. Administrators can apply holds that span an entire record code, customer or department; users can apply hold codes on a box-by-box basis. Together, hold codes and record codes form an effective, targeted retention programme.

1. Select **Records Management | Administration | Manage Holds**. The Manage Hold Codes screen is displayed.
2. Click **Create Hold Code**. The New Hold Code screen is displayed with the Hold Details tab screen open.
3. Select a customer from the dropdown list.
4. Identify the hold code by entering a unique three-alphanumeric character code and an associated description.
5. Select review and approval dates, and enter contact information for the requester and approver. Supply additional information about this hold code in the Notes field.
6. Click **Save**. The hold code is created and you are returned to the Manage Hold Codes screen where the code is listed in alphanumeric order

> **NOTE:** Use the column filters to quickly sort and search for hold codes.

2.10.2 Viewing and Editing a Hold Code

Viewing a Hold Code

1. Select **Records Management | Administration | Manage Holds**. The Manage Hold Codes screen will open.
2. Select a customer. Existing hold codes for that customer are displayed in alphanumeric order.
3. Click on the hold code or select **View Details** from the **Action** dropdown menu to the right of the hold code. The hold code is displayed with the Hold Details tab screen open.
4. When you have finished viewing the hold code, click **Close** to return to the Manage Hold Codes screen.

Editing a Hold Code

1. Select **Records Management |Administration | Manage Holds**. The Manage Hold Codes screen will open.
2. Select a customer. Existing hold codes for that customer are displayed in alphanumeric order.
3. Click on the **Action** dropdown menu to the right of the hold code and select **Edit** from the dropdown list.

   OR

   Click on the **Action** dropdown menu to the right of the hold code and select **View**. Next, click on the **Edit** button at the bottom of the screen.

4. Edit the hold code.
5. When you have finished editing the hold code, click **Save**. Your changes are saved.
6. Click **Close** to return to the Manage Hold Codes screen.

2.10.3 Assigning a Hold Code

Assign a hold code to a record code or to a department:

Assigning a Hold Code to a Record Code

Assign a hold code to a record code. All boxes that the record code is assigned to are automatically placed on hold.

1. Select **Records Management | Administration | Manage Holds**. The Manage Hold Codes screen opens.
2. Select a customer. Existing hold codes for that customer display in alphanumeric order.
3. Select **Assign Hold to Record Codes** from the **Action** dropdown to the right of the appropriate hold code. The Assign Hold Code screen opens.
4. Click the checkbox to the left of one or more record codes. Use the mutli-select checkbox at the top left of the screen to quickly select all record codes.
5. Click **Continue**.
6. Review the record codes that you have selected to place on hold.
7. Click **Assign Hold**.

> 📝 **NOTE:** Click **<Record Codes** to return to the previous screen and select different record codes.

8. The hold code is assigned d to the record codes and all boxes that are assigned the record code are automatically placed on hold.

Assigning a Hold Code to a Department

Assign a hold to a department. All boxes that belong to that department are automatically placed on hold.

1. Select **Records Management | Administration | Manage Holds**. The Manage Hold Codes screen opens.
2. Select a customer. Existing hold codes for that customer display in alphanumeric order.
3. Select **Assign Hold to Departments** from the **Action** dropdown to the right of the appropriate hold code. The Assign Hold Code screen opens.
4. Select the parts of the organization that are being placed on hold. The screen layout and process for selecting departments varies based on the customer's account profile settings:

   - If the customer is not division-enabled, only departments display. Click the checkbox to the left of one or more departments to place them on hold.
   - If the customer is division- and department-enabled, both divisions and departments display. Select one or more divisions to view the departments within that division; click the checkbox to the left of one or more departments to place them on hold.

5. Click **Continue**.
6. Review the departments that you have selected to place on hold.
7. Click **Assign Hold**.

Click **<Departments** to return to the previous screen and select different departments.

8. The hold code is assigned d to the departments and all boxes that belong to those departments are automatically placed on hold.

2.10.4 Removing a Hold Code

Remove a hold code from a record code or a department:

Removing a Hold Code from a Record Code

Remove a hold code from an entire record code.

1. Select **Records Management | Administration | Manage Holds**. The Manage Hold Codes screen opens.
2. Select a customer. Existing hold codes for that customer display in alphanumeric order.
3. Select **Remove Hold from Record Codes** from the **Action** dropdown to the right of the appropriate hold code. The Remove Hold Code screen opens; all record codes that are applied to this hold code are listed.
4. Click the checkbox to the left of one or more record codes. Use the mutli-select checkbox at the top left of the screen to quickly select all record codes.
5. Click **Continue**.
6. Review the record codes that you have selected to remove from hold.
7. Click **Remove Hold**.

   NOTE: Click **<Record Codes** to return to the previous screen and select different record codes.

8. The hold code is removed the record codes and all boxes that are assigned the record code and do not have any other holds applied are automatically removed from hold.

Removing a Hold Code from a Department

Remove a hold that Iron Mountain has placed on an entire department.

1. Select **Records Management | Administration | Manage Holds**. The Manage Hold Codes screen opens.
2. Select a customer. Existing hold codes for that customer display in alphanumeric order.
3. Select **Remove Hold from Departments** from the **Action** dropdown to the right of the appropriate hold code. The Remove Hold Code screen opens; all departments that are applied to this hold code are listed.
4. Select the departments that are being removed from hold.
5. Click **Continue**.
6. Review the departments that you have selected to remove from hold.
7. Click **Remove Hold**.

Click **<Departments** to return to the previous screen and select different departments.

8. The hold code is removed from the departments and all boxes that are assigned to that department and do not have any other holds applied are automatically removed from hold.

See Also
Creating a Hold Code✎ ✖
Viewing a Hold Code✎ ✖
Editing a Hold Code✎ ✖
Assigning & Removing Record Code Holds✎ ✖
Assigning a Hold Code to a Department✎ ✖

3   User Functionality

Iron Mountain Connect Records Management enables users to perform all of the workflows necessary to securely manage records throughout their entire lifecycle, from creation to destruction.

Access to Iron Mountain Connect Records Management functionality is based upon your role. Your system administrator sets user permissions and organisational access on an individual user basis depending on the tasks and workflows that you will be performing. This means that there are menu selections and information that you may not have access to, but that are described in this guide.

Your system administrator is also able to control data entry requirements on a customer-by-customer basis. This ensures that all required information is entered when a box or file is created; however, the fields in which you can enter data may vary according to the customer.

3.1 General Information

3.1.1 Default and Favourite Addresses

Use the following steps to set default and favourite addresses that are displayed at the top of the Shipping Address List screen for quicker, easier access. The default address is the first address listed on the Shipping Address List screen; it automatically populates the fields in the Detail step of the wizard. Favourite addresses are listed directly below the default address.

1. Locate the address you wish to set as default or favourite.
2. Click to access the Default/Favourite drop-down menu options:

- **Setting a Default**: To set this as the default address, select **Set as Default**. The address is marked as default and placed at the top of the list. If a default address had been set previously, it is replaced.
- **Adding a Favourite**: To set this as a favourite address, select **Add to Favourites**. The address is marked as a favourite . Favourite addresses are listed directly below the default address.
- **Removing a Favourite**: To remove a favourite address,select **Remove from Favourites**. The address is removed from the favourites and returned to the list of addresses.

3.1.2 Paging Through Results Screens

Utilise the paging functionality at the bottom of the screen to quickly locate your results or find an item on a list screen. You are able to:

- Move to **next** and **prior** screens
- Move to the **first** and **last** screens

- Refresh the screen display
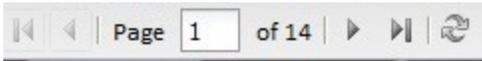
Larger results screen such as the Search Results screen and the Collection List screen have additional paging functionality. In addition to the above functionality, you are able to:

- Change the number of results that display on the screen (the system defaults to 25 results)

3.1.3 Customising Results Screens

Use the functionality built into Iron Mountain Connect Records Management's many results (list or grid) screens to customise the results display so that they meet your specific needs.

Add/Remove Columns

Control which columns are displayed on the results screens.

1. Click the drop-down selector to the right of any of the columns on the screen.
2. Hover over the Columns icon .
3. Click the tick box to the left of the column(s) that you want to include on or exclude from the screen. The screen display will update immediately to reflect your selections.
4. Click a different area of the screen to close the column selector.
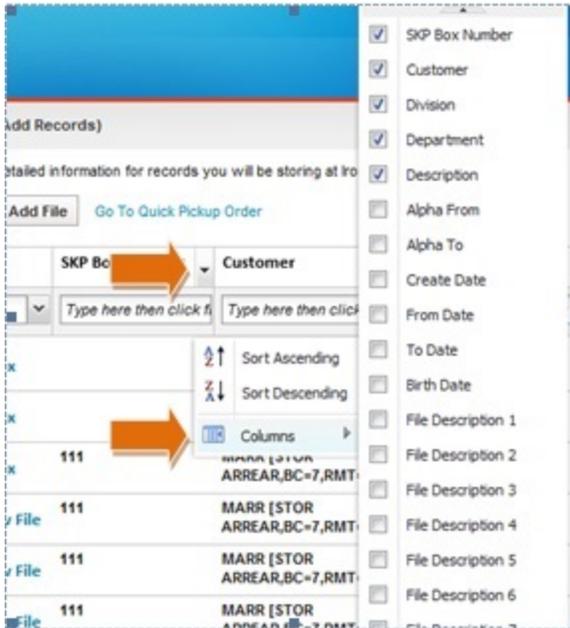
> 📋 **NOTE:** The columns available in the selector and on the Search Results screen vary based on your View Box Record Detail and View File Record Detail user permission settings, which are controlled by your system administrator.

Sort Column Results

Sort the results that are displayed on results screens in ascending or descending alphanumeric order.

2. Click the drop-down selector ⌄ to the right of any of the columns.
3. Hover over the appropriate sort icon:

- Sort in ascending alphanumeric order ↑
- Sort in descending alphanumeric order ↓

4. Your data is immediately resorted and refreshed.
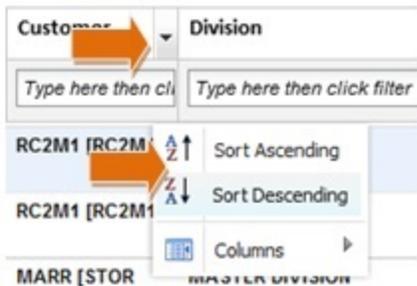
Filter Column Results

You can filter within columns of data . Filtering allows you to narrow your search results.

1. Enter a letter, number or combination to filter the data that will be displayed in the column. Use the wildcard operator (*) for easier filtering.
2. Click **Filter**. Your results are displayed with your filter applied.

Reset Filters

Click the **x** in the filter field to clear an individual filter as opposed to using the **Reset View** button (below) to clear all filters and settings.
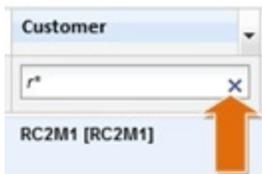
Move Columns

Drag and drop columns to move them into a different position on the results screen. You can customise your display based on the information you use most frequently.

Change Column Size

1. To change the column width, position your cursor over the edge of the column.
2. Your cursor changes to indicate that you are able to resize the column.
3. Left click and drag the column to the appropriate length.
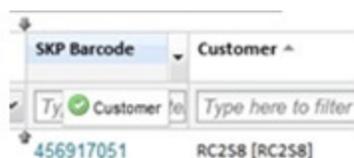
Reset the Screen

Click the **Reset View** button to clear ALL filters and restore the screen to its **default** state. If you have changed the sort order or column size, or added, moved or removed columns, they will be reset.

> **NOTE:** On the Search Results screen, the selection box, Item Type, Status and Action columns are fixed. On the Collection List screen, the Record Type, Status and Action columns are fixed.

3.1.4 Displaying Custom Field Labels on Grid Screens and Exports

The grid label preferences enable you to control the labels displayed in the following screens:

- Search Results
- Pickup List

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.
2. Select **Grid Label Preferences** from the **Search Tools** dropdown located at the top of the left-side search bar. The Grid Label Preferences screen opens. The first time you access this screen, the grid label preferences are set to show the default labels.
3. If you need to change the grid labels for box-related column labels, you will use the upper portion of this screen:

    a. Click the **Custom Labels** radio button near the top of the screen.

    b. Select the customer the custom labels will display for.

    c. A sample grid showing the custom labels for the customer displays.

4. If you need to change the grid labels for file-related column labels, you will use the lower portion of this screen:

    a. Click the **Custom Labels** radio button near the middle of the screen.

    b. Select the customer, division (if division-enabled) and department (if division- and department-enabled) that the custom labels will display for.

    c. A sample grid showing the custom labels for the customer, division and department displays.

5. Click **Save**. The grid label preferences are saved and now display when you access the Search Results and Pickup List screens, as well as on exports from both of these screens.

3.1.5 Why Do I See Fields That Are Not in the Documentation

The online help and documentation provided by Iron Mountain refer to the default field labels provided with the application.

If your organisation uses custom field labels, different labels will display in the application than those referred to in the online help and documentation.

Custom field labels replace the default (system-assigned) Iron Mountain Connect Records Management labels and enable your organisation to repurpose a field and create a more intuitive user interface.

Custom field labels appear on screens throughout the application, including but not limited to:

- Left-Side Search Bar
- Advanced Search
- Box Details
- File Details
- Search Results (must set grid label preferences to Custom)
- Pickup List (must set grid label preferences to Custom)
- Customise Box/File Entry Layout
- Cart Items (all order types)
- Cart Details (all order types)

Custom field labels are added and maintained by your system administrator. Please direct questions concerning these field labels to your system administrator.

3.1.6 Multi-Select Functionality

Multi-select is a time-saving functionality built into Iron Mountain Connect Records Management list screens such as the Search Results screen and the Collection List screen. Boxes enable you to select multiple line items and perform actions on all of the selected items at the same time.

1. Tick the multi-select box located to the left of the Record Type column on the Search Results screen or the Item Type column on the Collection List.

> **NOTE:** If you are using Iron Mountain Site Validation functionality, you must select a Customer to enable the multi-select boxes.

2. The multi-action dropdown menu is activated as soon as you select two or more files.

3. Select the multi-action you wish to perform:

   Search Results Multi-Select

   - Add multiple records to your basket
   - Remove multiple records from your basket
   - Request unlisted files
   - Request an Image on Demand (IOD)
   - Request an X-ray on Demand (XOD)

Collection List Multi-Select

- Add multiple records to your basket
- Remove multiple records from your basket

3.1.7 Using Your Basket

Your basket is a holding area for records and supplies before an order is placed. You can add and remove retrieval orders, collection orders and supply orders to and from your basket.

Each time you add an item to your basket, the basket label updates to indicate the total number of items it contains.
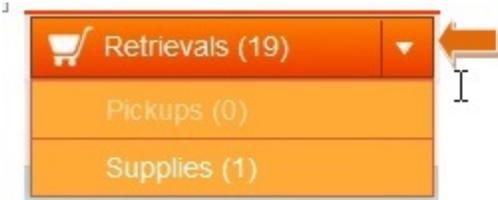
Click the dropdown to the right of the basket label to access any of the three baskets.

Each basket has a wizard that automates the order process and walks you through the steps required to process each type of order from start to finish. To open the basket wizard, click on the basket button.

3.1.8 Using Purchase Orders

⚠ Purchase Order functionality is country-specific and may not be available in your region.

Customers that use purchase order numbers to assign and track expenses are able to apply purchase order numbers from SafeKeeperPLUS to collections, retrieval and supply orders in Iron Mountain Connect Records Management. After the orders are processed, the purchase order is automatically decremented and the status is adjusted.

To be applied, a purchase order number must have an **active** status:

- Purchase order number has reached its start date and has not yet reached its expiry date
- Purchase order number has sufficient funds

Purchase Order Statuses:

- **Active**: Positive balance; current date range (appear on Lookup Purchase Order Number screen)
- **Inactive**: Start date in future (do not appear on Lookup Purchase Order Number screen)
- **Suspended**: Negative balance (do not appear on Lookup Purchase Order Number screen)
- **Closed**: Expired; end date is passed (do not appear on Lookup Purchase Order Number screen)

Applying a Purchase Order Number

Apply a purchase order number while entering the billing information during the first step in any of the order wizards (Step 1: Basket Items). The billing fields that you will need to complete vary based on your company's records management hierarchy and **service levels (Section 2.2.10)**:

1. If applicable, select the **Invoice to Division** and/or **Invoice to Department** that will incur the cost of this order. Any instructions associated with the Billing Department default from SafeKeeperPLUS and are displayed below this field.
2. Enter the purchase order number manually or use the purchase order number lookup described below to select from available purchase order numbers.

Looking Up a Purchase Order Number

1. Click the Purchase Order Lookup ▤ located to the right of the PO Number field. The Lookup Purchase Order Number screen opens. Active purchase order numbers (purchase orders that have reached their start date, have not yet reached their expiry date and have sufficient funds) are displayed based on the customer's records management hierarchy and billing requirements.
2. Click on a row to select and apply a purchase order number. The purchase order number is applied to all line items the customer has placed on the order.

> 📋 **NOTE:** Purchase orders can be created and assigned to an enterprise. If a purchase order is assigned to a company that is part of an enterprise, the Enterprise column is populated.

3.1.9 Calculating Retention

Retention is a fundamental component in records management programmes. A clearly defined retention programme ensures that you store the proper records at an Iron Mountain facility for the correct amount of time, and that you destroy these records in a timely manner, thereby adhering to national laws and industry regulations. Iron Mountain Connect Records Management makes it easy to effectively manage your retention programme and reduce the risks and costs associated with under and over-retention of records.

Iron Mountain Connect Records Management's flexible design enables it to meet the retention needs of a wide variety of organisations. Due to the complex and varied nature of retention programmes, Iron Mountain's account team works with you and assesses your needs in order to set up the retention option that best meets them.

Record codes drive retention policy; they are used in Iron Mountain Connect Records Management to automatically calculate the length of time for which a record is retained. Record codes are defined at the enterprise, customer and department levels. Customers that use Iron Mountain Connect Records Management to calculate retention are required to assign a record code when creating a box or file; your retention options determine how a record code and the associated destruction data fields function.

Hold codes also play a key part in your retention programme; they enable you to override the retention fields on a record

and prevent record destruction when necessary. You can apply holds on a box-by-box basis or you can apply a hold that spans an entire record code, department or customer. Together, record codes and hold codes enable you to create and manage an effective, targeted retention programme.

Retention Options

Due to the complex and varied nature of retention programmes, Iron Mountain's account team works with you and assesses your needs in order to set up the retention option that best meets them. The steps associated with each retention option are outlined in **Creating a Box**:

- **Retention is Not Calculated**: If your organisation does not use Iron Mountain Connect Records Management to calculate retention, the record code and destruction data that you enter are informational only, no automatic calculations are performed.
- **Retention is Calculated:**   If your organisation does use Iron Mountain Connect Records Management to calculate retention, the application can be set up to calculate retention as follows:
  - **Automatic Calculation from Setup Date Onwards:** Iron Mountain Connect Records Management automatically calculates retention for all boxes that you create after contracting for retention functionality. Boxes created prior to the setup date are not converted to use automatic retention calculation and do not require updating.
  - **Automatic Calculation for All Boxes:** Iron Mountain Connect Records Management automatically calculates retention for all new and existing boxes.
  - **Manual Override of Automatic Calculations:** Your organisation is able to manually override automatic calculations as necessary to accommodate exceptions. The Destruction Indicator and the Destruction Eligibility Date fields function as manual entry fields that override the record code's Destruction Eligibility Period.

3.1.10 Iron Mountain Site Validation

Organisations that require extra control over their boxes can use Iron Mountain Site Validation functionality. Iron Mountain Site Validation enables you to select the specific boxes on a collection order and communicate them in advance to Iron Mountain.   Iron Mountain validates collection, creating a traceable chain of custody.

Iron Mountain Site Validation works for both new and returning boxes. 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.

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

3.2 Boxes

A box is a physical storage container that holds files that are stored at Iron Mountain. You can create a box record in Iron Mountain Records Management to track each physical box that you send to Iron Mountain for storage. Boxes are identified by:

- **SKP Barcode**: Unique 11-alphanumeric character code that is assigned by Iron Mountain when the box is entered into Iron Mountain Connect Records Management.
- **Key Identifier**: Field that is designated by a customer as the primary field for tracking and identifying boxes. The Key Identifier is required at box creation. Your system administrator selects the Key Identifier if a custom box template is used, or it defaults to Customer Box Number if the Iron Mountain default box template is used.

  Box Key Identifiers

  - SKP Barcode
  - Customer Box Number*
  - Reference 1
  - Minor Description
  - Major Description

  *The default Key Identifier; applied if a customer does not use a custom template

- **Metadata:** Information that you enter in fields on the box record. The more metadata that you enter when you create a box, the easier it is to search for and retrieve the box from storage. The metadata that you enter will help you identify the box and its contents, without having to retrieve it from storage.

> **NOTE:** Creating a box in Iron Mountain Connect Records Management does not place it in storage. To request that boxes be sent to an Iron Mountain storage facility, **create a collection order (Section 3.10.1)**.

3.2.1 Creating a Box

1. Select **Records Management | Collections, Add Records | Collection List (Add Records).** The Collection List screen opens.
2. Click **Add Box**. The Choose Box Type screen opens. The most commonly used Iron Mountain boxes are displayed.
3. If necessary, select a different **country**.
4. Click to highlight and select the type of box that you wish to create based on your storage needs. Iron Mountain Records Management opens the Box Details tab screen.

> **NOTE:** If you are not using an Iron Mountain-supplied box, select a box that is equal to or greater in dimension than the box you will be using.

5. Select a Customer. Your organisation's box template settings determine which fields are displayed and required when you create a box.

6. If the customer is division or department-enabled, select the appropriate division or department.
7. To create a custom data entry layout that the application will retain from one session to another, click **Customise Layout (Section 3.2.4)**.
8. Enter metadata to identify this box should you need to locate and retrieve it from storage. You must enter data in the required fields, which are marked with red asterisks (*).

   - Lock fields to retain the field for use in subsequently added records. Click**Lock**.

   - Click**Save & Add**to continue creating additional boxes.

   - Click**Add Files**to create and **add files to this box (Section 3.2.5)**.

9. Enter information in the **retention fields**. Your internal retention policies and the way that Iron Mountain Connect Records Management is set up determine which fields are displayed and whether or not calculations automatically occur. Iron Mountain's account team will work with you and assess your needs in order to set up the retention option that best meets them:

- **If Retention is Calculated:**Due to the complex and varied nature of retention programmes, Iron Mountain's account team works with you and assesses your needs in order to set up one of the following retention options that best meets them:

Automatic Calculation from Setup Date Onwards

Iron Mountain Connect Records Management automatically calculates retention for all boxes that you create after contracting retention functionality. Boxes created prior to the setup date are not converted to use automatic retention calculation and do not require updating.

a.Enter a record code or use the record code lookupto find existing codes.

b.The Destruction Eligibility Period associated with the record code defaults to the box record:

- **Indefinite**: Destruction indefinitely postponed until after a specific date; Indefinite is displayed in the Destruction Eligibility Date field. Leave this set to Indefinite or enter a date to override the Indefinite Destruction Eligibility Period.

📄 **NOTE:** If you create a box with a record code that has an Indefinite Destruction Eligibility Period, the Indefinite Destruction Eligibility Period is displayed as Indefinite when you View the record.

- **Permanent**: Destruction permanently postponed; Permanent is displayed in the Destruction Eligibility Period field
- **Undefined**: Destruction date not set; Undefined is displayed in the Destruction Eligibility Period field
- **Fixed**: Formulae built into the record code automatically calculate the date to be displayed in the Destruction Eligibility Period field

📄 **NOTE:** If you select a *Fixed* record code and the field referenced by the formula is blank, Iron Mountain Connect Records Management sets the Destruction Eligibility Period to *Undefined* and the date is not calculated. For example, if the calculation is *5 Years After Creation Date* and the Creation Date on the Box is

blank, the Destruction Eligibility Period will be *Undefined*.

If you select a *Fixed* record code and set the field referenced by the formula AFTER you select the record code, Iron Mountain Connect Records Management calculates the date when you SAVE the record.

Automatic Calculation for all New Boxes

Iron Mountain Connect Records Management automatically calculates retention for all new and existing boxes.

a. Enter a record code or use the record code lookupto find existing codes.

b. The Destruction Eligibility Period associated with the record code defaults to the box record:

- **Indefinite**: Destruction indefinitely postponed until after a specific date; Indefinite is displayed in the Destruction Eligibility Date field. Leave this set to Indefinite or enter a date to override the Indefinite Destruction Eligibility Period.

> **NOTE:** If you create a box with a record code that has an Indefinite Destruction Eligibility Period, the Indefinite Destruction Eligibility Period is displayed as Indefinite when you View the record.

- **Permanent**: Destruction permanently postponed; Permanent is displayed in the Destruction Eligibility Period field.
- **Undefined**: Destruction date not set; Undefined is displayed in the Destruction Eligibility Period field.
- **Fixed**: Formulae built into the record code automatically calculate the date to be displayed in the Destruction Eligibility Period field.

> **NOTE:** If you select a *Fixed* record code and the field referenced by the formula is blank, Iron Mountain Connect Records Management sets the Destruction Eligibility Period to *Undefined* and the date is not calculated. For example, if the calculation is *5 Years After Creation Date* and the Creation Date on the Box is blank, the Destruction Eligibility Period will be *Undefined*.
>
> If you select a *Fixed* record code and set the field referenced by the formula AFTER you select the record code, Iron Mountain Connect Records Management calculates the date when you SAVE the record.

Manual Override of Automatic Calculations

Your organisation is able to manually override automatic calculations as necessary to accommodate exceptions. The Destruction Indicator and the Destruction Eligibility Date fields function as manual entry fields that override the record code's Destruction Eligibility Period.

a.Enter a record code or use the record code lookupto find existing codes.

b.The Destruction Eligibility Period associated with the record code defaults to the box record:

- **Indefinite**: Destruction indefinitely postponed until after a specific date; Indefinite is displayed in the Destruction Eligibility Date field. Leave this set to Indefinite or enter a date to override the Indefinite Destruction Eligibility Period.

> **NOTE:** If you create a box with a record code that has an Indefinite Destruction Eligibility Period, the Indefinite Destruction Eligibility Period is displayed as Indefinite when you View the record.

- **Permanent**: Destruction permanently postponed; Iron Mountain Connect Records Management automatically displays Permanent in the Destruction Eligibility Period field.
- **Undefined**: Destruction date not set; Iron Mountain Connect Records Management automatically displays Undefined in the Destruction Eligibility Period field.
- **Fixed**: Formulae built into the record code automatically calculate the date, which is then displayed in the Destruction Eligibility Period field

c.To manually override the Destruction Eligibility Period, select a destruction indicator OR a destruction eligibility date.

> **NOTE:** If you are set up for manual override but wish to use automatic calculation, leave the Destruction Indicator and Destruction Eligibility Date fields blank. Iron Mountain Connect Records Management will automatically calculate the Destruction Eligibility Period based on the record code you selected.
>
> If you select a *Fixed* record code and set the field referenced by the formula AFTER you select the record code, Iron Mountain Connect Records Management calculates the date when you SAVE the record.

- **If Retention is NOT Calculated**

Retention is NOT Calculated

If your organisation does not use Iron Mountain Connect Records Management to calculate retention, the record code and destruction data that you enter are informational only and no automatic calculations are performed. Your system administrator has the option of using a custom box template to disable the record code field so that it does not appear on the Box Details tab screen.

a. If enabled, enter a record code or use the record code lookup to find existing codes. Organisations that do not use Iron Mountain Connect Records Management to calculate retention are not required to validate record codes. If your organisation does validate record codes, you must enter or use the lookup to select a code that exists in SafeKeeperPLUS™.

Each record code has an associated Destruction Eligibility Period:

- Indefinite
- Permanent
- Undefined
- Fixed

b. Select a Destruction Indicator OR a Destruction Eligibility Date. This entry overrides the Destruction Eligibility Period associated with the record code.

10. If necessary,place the box**on hold**to prevent destruction. You are also able to view and remove hold codes while creating a box.
11. Save the box. If your organisation uses Iron Mountain Connect Records Management to calculate retention, the calculations are performed and the box appearson the collection list, organised in descending order by SKP Barcode. If the SKP Barcode is blank because Iron Mountain assigns it for your organisation upon receipt, boxes are ordered with the newest box at the top of the collection list.

- Click**Save & Close**to save this box and return to the Collection List screen where the box will be displayed.
- Click**Save & Add**to continue creating additional boxes.
- Click**Add Files**to create and **add files to this box (Section 3.2.5).**

NOTE: If a field contains invalid data or if a required field is blank, the field will be highlighted when you try to add the record. Correct your entry and then click Add Record.

3.2.2 Box Fields

Enter information in the following metadata fields when creating a box:

BOX FIELDS		
Field Name	**Format/Max. Characters**	**Description**
SKP Barcode *	11	Unique barcode provided by Iron Mountain to identify a box.
Customer Box Number*	11	Customer-defined alphanumeric identifier for the box.
Division	Dropdown List	Alphanumeric identifier assigned to the division to which the box belongs.
Department	Dropdown List	Alphanumeric identifier assigned to the department to which the box belongs.
Reference 1*	25	Alphanumeric identifier typically used for legacy storage systems.
Major Description*	30	Primary description of the box.

Minor Description*	30	Secondary description of the box.
Alpha From	10	Beginning of a customer-defined alphanumeric sequence by which the box is classified.
Alpha To	10	End of a customer-defined alphanumeric sequence by which the box is classified.
From Date	Date Format varies; set in User Profile	Beginning of a customer-specified date span.
To Date	Date Format varies; set in User Profile	End of a customer-specified date span.
Creation Date	Date format varies; set in User Profile	Date on which the box was added to Iron Mountain Connect Records Management.
Event Date	Date format varies; set in User Profile	Date of an event that correlates to this box.
Long Description	2,500	Extended description of the contents of a box.
Record Code	8-12	SafeKeeperPLUS™ code that, along with other destruction data, determines the length of time for which a record will be stored at Iron Mountain.
Destruction Eligibility Period		Length of time for which a record will be retained before it is eligible to be destroyed; defaults from the Record Code: • Undefined, • Indefinite • Permanent • Fixed (Date format varies; set in User Profile)
Destruction Indicator	System-defined	Length of time a record will be retained before it is eligible to be destroyed. • Indefinite • Permanent • Undefined
Destruction Eligibility Date	Date format varies; set in User Profile	Manually-entered date after which the box is eligible to be destroyed. When used, the Destruction Eligibility Date overrides the Destruction Eligibility Period on the record code.

Hold Codes	Links: • View Assigned • Assign • Remove	Links that enable users with the proper permissions to view and manage hold codes that prevent a box from being destroyed.
*Fields that can be used as the Key Identifier. The default Key Identifier is Customer Box Number.		

3.2.3 Locking Box Entry Fields

If you are adding multiple boxes that have identical values in one or more fields, use the **Lock** command for faster data entry. Locking a field retains the data entered in the field so that you do not need to re-enter it on subsequent new boxes, similar to using a template. This saves data entry time when information is replicated from box to box. You are able to lock all fields with the exception of the Customer field.

Your locked fields apply to your current Iron Mountain Connect Records Management session, or until you select a different customer or exit from **Collection List (Add Records)**.

1. Enter a value in a field on the Box Detail tab screen.
2. Click **(lock)**.
3. The value in the field changes to grey to indicate that it is locked and the lock indicator changes to **(unlock)**. This field retains the value and it is applied to all boxes that you create during this session.

> 📝 **NOTE:** Iron Mountain Connect Records Management automatically unlocks the Department and changes it to *Select* if you change the Division with the Department field locked.

Unlocking Box Entry Fields

To unlock a box entry field, click **(unlock)**. The lock indicator changes to **(lock)** and you are able to update the information in the field.

3.2.4 Customising the Box Details Screen Layout

This time-saving feature enables standard users to customise the layout of metadata fields on the Box Details screen during data entry sessions. Users can enable and disable fields that their system administrator has enabled (required fields cannot be modified). They can optimise data entry by displaying only the fields they use, arranging them in the order in which they enter data and locking data to eliminate duplicate entry. The custom layout can be updated at any time during box entry.

> 📝 **NOTE:** Box template settings controlled by your system administrator override custom page layouts.

1. From within the Box Details screen, click **>Customise Layout** (located in the top right-hand corner of your screen). The Customise Box Entry Layout screen opens. The settings that are displayed when you open this screen are the default settings, which are controlled by your system administrator.
2. Use the top section of the screen to customise the placement of the fields on the Box Entry screen. Drag and drop the fields across the columns.

   - Columns are limited to a maximum of five fields
   - Long Description occupies two fields.

3. Use the lower section of the screen to **enable, disable and require** fields on the Box Details tab screen:

   •**Enable**: Click the **Enabled** tick box; users have the option of entering information in enabled fields when creating a box

   •**Require**: Click the **Required** tick box; users must complete required fields when creating a box

   •**Disable**: Leave both the **Enabled** and **Required** tick boxes blank to disable the field so that it is not displayed on the Box Details screen

> 📋 **NOTE:** Either Destruction Indicator or Destruction Eligibility Date can be required; both fields cannot be required.

> 📋 **NOTE:** When disabling a field, consider whether or not the field is used to calculate retention. For example, do not disable Create Date if you have a record code that is calculated 7 Years After Create Date.

4. Assign **default values** that are retained in the fields on the Box Details screen. For example, enter *LEGAL* as the default value for the Reference 1 field. Each time you create a box, *LEGAL* defaults in the Reference 1 field. You are able to override the default value from within the Box Details screen.
5. Click **Save Layout**. You are returned to the Box Details tab screen and the custom layout is immediately applied.

Restoring Default Settings

Click **Restore Defaults** to remove the custom settings and values that you entered and restore the default settings that come from your company's box template. Next, click **Save Layout** to preserve the default settings.

> 📋 **NOTE**: **Customise Layout** functionality is available during box creation; it is not functional when viewing or editing a box.

3.2.5 Adding a New File to a New Box

Use this functionality to add a new file to a box that you have used this application to create, but that has not yet been sent to Iron Mountain storage.

> 📋 **NOTE:** File screens were intentionally designed with the buttons at the top to alert users that they are working on

> files, rather than boxes.

1. Select **Records Management | Collections, Add Records | Collection List (Add Records)**. The Collection List screen opens.
2. Click on the **Action** dropdown menu to the right of the box to which you need to add files and select **Add Files** from the dropdown list. The New File screen will open.

📋 **NOTE:** You are also able to add new files to a new box while using the **View Box** functionality.

3. The customer, division, department and SKP Barcode assigned to the box automatically default onto the file. Your organisation's data entry requirements determine which fields are displayed and required when you create a file.

📋 **NOTE:** When you create a file, the organisational structure defaults from the box. If your organisation is division and/or department-enabled and you have the proper permission, you are able to update the file's division and/or department.

4. To create a custom data entry layout that the application will retain from one session to another, click **Customise Layout (Section 3.2.4).**
5. Enter metadata to identify this file should you need to locate and retrieve it from storage. You must enter data in the required fields, which are marked with red asterisks (*).

   - You are required to enter a value into the Key Identifier for files, which can be an SKP Barcode or File Descriptions 1 – 6. The value you enter here will be displayed on the File Details screen, the Item step of the retrieval order basket, on order confirmation emails and on the Order Info tab screen in the **Track Orders** selection.
   - To lock fields to retain the data in the field for use in subsequently added records, click **Lock**.
   - To edit a locked field, click **Unlock**.
   - To find a value for a field, click on the dropdown menu ⏷ or the calendar icon 📅, and then select a value.

6. Enter optional destruction data (because files are typically destroyed as part of a whole box, the information that you enter in the following fields is for your use only, it does not trigger notification or destruction):

   - Record Code
   - Destruction Eligibility Date

7. Save the file. New files are displayed on the collection list under the box in which they are stored in descending order based on entry date and time. Iron Mountain Connect Records Management automatically assigns a status of *New* to new files added to new boxes.

   - Click **Save File & Close** to save this file and return to the Collection List screen where the file is displayed below the box in which it is contained.
   - Click **Save & Add Another File** to continue creating additional files inside the same box.

> **NOTE:** If a field contains invalid data or if a required field is blank, the field will be highlighted when you try to add the record. Correct your entry, and then click **Add Record**.

3.2.6 Viewing a New Box

Follow the steps below to view a new box that has not yet been stored at Iron Mountain.

1. Select **Records Management | Collections, Add Records | Collection List (Add Records)**. The Collection List screen opens.
2. Click the **Action** dropdown to the right of the box and select **View** from the dropdown list. The box record opens with the Box Details screen displayed in view-only mode.
3. Review the box details:

   - If the Long Description contains more than 100 words, click **More** to view the entire description.
   - Click the File tab to view a list of the files contained in this box.
   - Click the**Edit**button to **edit the box details (Section 3.2.7)**.
   - If your company stores files with Iron Mountain, you will be have an option to click the Add File button to add files to this box.**Add File**button to **add files to this box (Section 3.2.5)**.

4. Click **Close** to return to the Collection List screen.

3.2.7 Editing a New Box

Follow the steps below to edit a new box that has not yet been stored at Iron Mountain.

1. Select **Records Management | Collections, Add Records | Collection List (Add Records)**. The Collection List screen opens.
2. Click the **Action** dropdown to the right of the box and select **Edit** from the dropdown list. The box record opens with the Box Details screen displayed.

> **NOTE:** New Box icons are clickable. Use them as a shortcut to open the View Box screen instead of using the **Action** dropdown selections.

3. Edit the box details. Changing the Customer will cause you to lose any data you entered previously on this screen.

   - Click the File tab to view a list of the files contained in this box.
   - If your company stores files with Iron Mountain, click the **Add File** button to add files to this box.

4. Click **Save** to save your changes and return to the Collection List screen.

> **NOTE:** You are also able to edit box details while using the View Box functionality.

3.2.8 Editing Multiple Boxes or Files (Multi-Box or Multi-File Edit)

Multi-item edit enables you to add and overwrite field values on up to 100 boxes or files at once. Use this time-saving feature to quickly make bulk changes to existing records that are stored at Iron Mountain, including assigning hold codes to boxes and removing hold codes from boxes.

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.
2. **Perform a search (Section 3.5.1)** to find the records you need to edit:

   - Items must be the same record type (boxes or files)
   - Boxes must belong to the same customer
   - Files must belong to the same customer, division and/or department and cannot include open shelf files

3. Click the tick box to the left of each record to select two or more boxes or files. You are able to select up to 100 records to edit at once.

> **NOTE:** Click the top-level multi-select tick box (located to the left of the Item Type column) to select all records displayed on the current screen.

4. Click the **Multi-Select Action** dropdown and select **Multi-Item Edit**. The Multi-Box Edit or Multi-File Edit screen opens.
5. Enter values in the appropriate fields. Your entry will overwrite the value on the selected boxes or files. You can also:

   - **Leave a field blank**: Fields that you leave blank will not be overwritten.
   - **Clear existing field values**: Click the **x** above the right corner of a field to create a blank entry that clears the field value from all of the selected boxes or files.
   - **Clear a data entry mistake**: Click the **x** within a field to clear an individual entry from the Multi-Edit screen prior to confirming and overwriting.

   Refer to the sections on **Box Fields** and **File Fields** for information about the fields you are editing.

6. Click **Confirm>**.

> **NOTE:** Click **<Field Values** to return to the previous screen and modify any of the edits before finalising them.

7. Review the fields that you are editing and click **Finish**.
8. Iron Mountain Connect Records Management updates the field values of the selected boxes or files and adds a corresponding entry on the record's Data History tab. An email confirmation is sent to the email address on your user profile.

3.2.9 Removing and Deleting Boxes from a Collection List

Existing boxes are already in storage at Iron Mountain; they cannot be deleted from Iron Mountain Connect Records Management. However, they can be **removed** from a collection list. Iron Mountain Connect Records Management automatically removes existing boxes from the collection list when you remove the last file in the box.

New boxes are boxes that you have prepared for offsite storage but that have not yet been delivered to Iron Mountain and associated with an SKP Barcode. You are able to **delete** a <u>new</u> box and a new box containing new files from the collection list. Deleting a new box or file removes it from the collection list and from Iron Mountain Connect Records Management.

1. Select **Records Management | Collections, Add Records | Collection List (Add Records)**. The Collection List screen opens.
2. Click the **Action** drop-down menu to the right of the box you wish to remove from the collection list and select **Delete** from the drop-down list.
3. Iron Mountain Connect Records Management prompts you to ensure that you wish to remove the box from the collection list. Click **Delete**. The box is removed and a success message is displayed on the Collection List screen.

3.2.10 Refiling an Existing Box

Use this functionality to add an existing box that is already in storage at Iron Mountain to the collection list.

1. Select **Records Management | Collections, Add Records | Quick Collection Order**. The Quick Collection screen opens.
2. Select a customer.

> 📋 **NOTE:** Changing the customer at any time during the collection order process will remove items that you have added to your basket and clear entries on the Quick Collection screen.

3. For each type of file or box to be picked up, type the number of New and Refile items.
4. Click **Add to Basket**. Iron Mountain Connect Records Management increments your basket by one for each type of **new** AND **refile** item on the order. For example, your basket is incremented by one whether you add a single standard box or four standard boxes.
5. Next, the Collection Order wizard leads you step-by-step through the order process starting with **Collection Order Wizard Step 1: Collection Order Basket Items (Section 3.10.2).**

> 📋 **NOTE:** Items remain in your basket from one session to another until you complete an order or manually remove the item.

Refiling an Existing Box with Iron Mountain Site Validation

Organisations that contract Iron Mountain Site Validation functionality use the following steps to refile an existing box.

Refiling an Existing Box with Iron Mountain Site Validation

1. Select **Records Management | Collections, Add Records | Collection List (Add Records)**. The Collection List screen opens.
2. Click **Refile Box**. The Find Existing Box screen opens.
3. Select a customer.
4. Enter the SKP Barcode that correlates to the box that will be refiled and click **Continue**. Refile boxes must have a status of *Checked Out from Iron Mountain*.
5. Save the box. Retention calculations are performed and the box appears on the collection list organized in descending order by SKP Barcode. If the SKP Barcode is blank because Iron Mountain assigns it for your organization at receipt, boxes are ordered with the newest box at the top of the collection list.

   > **NOTE**: If your user permissions force you to enter missing metadata when refiling a box and this box contains required fields that have been left blank, the Box Details screen opens. Correct the highlighted fields, and then click **Save**.

3.2.11 Calculating Retention

Retention is a fundamental component in records management programmes. A clearly defined retention programme ensures that you store the proper records at an Iron Mountain facility for the correct amount of time, and that you destroy these records in a timely manner, thereby adhering to national laws and industry regulations. Iron Mountain Connect Records Management makes it easy to effectively manage your retention programme and reduce the risks and costs associated with under and over-retention of records.

Iron Mountain Connect Records Management's flexible design enables it to meet the retention needs of a wide variety of organisations. Due to the complex and varied nature of retention programmes, Iron Mountain's account team works with you and assesses your needs in order to set up the retention option that best meets them.

Record codes drive retention policy; they are used in Iron Mountain Connect Records Management to automatically calculate the length of time for which a record is retained. Record codes are defined at the enterprise, customer and department levels. Customers that use Iron Mountain Connect Records Management to calculate retention are required to assign a record code when creating a box or file; your retention options determine how a record code and the associated destruction data fields function.

Hold codes also play a key part in your retention programme; they enable you to override the retention fields on a record and prevent record destruction when necessary. You can apply holds on a box-by-box basis or you can apply a hold that spans an entire record code, department or customer. Together, record codes and hold codes enable you to create and

manage an effective, targeted retention programme.

Retention Options

Due to the complex and varied nature of retention programmes, Iron Mountain's account team works with you and assesses your needs in order to set up the retention option that best meets them. The steps associated with each retention option are outlined in **Creating a Box**:

- **Retention is Not Calculated**: If your organisation does not use Iron Mountain Connect Records Management to calculate retention, the record code and destruction data that you enter are informational only, no automatic calculations are performed.
- **Retention is Calculated:**   If your organisation does use Iron Mountain Connect Records Management to calculate retention, the application can be set up to calculate retention as follows:
    - **Automatic Calculation from Setup Date Onwards:** Iron Mountain Connect Records Management automatically calculates retention for all boxes that you create after contracting for retention functionality. Boxes created prior to the setup date are not converted to use automatic retention calculation and do not require updating.
    - **Automatic Calculation for All Boxes:** Iron Mountain Connect Records Management automatically calculates retention for all new and existing boxes.
    - **Manual Override of Automatic Calculations:** Your organisation is able to manually override automatic calculations as necessary to accommodate exceptions. The Destruction Indicator and the Destruction Eligibility Date fields function as manual entry fields that override the record code's Destruction Eligibility Period.

3.2.12 Iron Mountain Site Validation

Organisations that require extra control over their boxes can use Iron Mountain Site Validation functionality. Iron Mountain Site Validation enables you to select the specific boxes on a collection order and communicate them in advance to Iron Mountain.   Iron Mountain validates collection, creating a traceable chain of custody.

Iron Mountain Site Validation works for both new and returning boxes. 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.

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

3.2.13 Holds

3.2.13.1 Putting a Box on Hold

Use the following sections to learn how to assign hold codes to new and existing (at Iron Mountain) boxes.

Putting an Existing Box on Hold

Users with the proper permissions are able to assign one or more hold codes to a box to prevent it from being added to a destruction order. Only hold codes that have not yet been assigned are available. For boxes already on hold, you are able to assign additional hold codes that have not yet been assigned to this box.

1. Select Records Management | Search, Retrieve. The Search Results screen is displayed.
2. Follow the steps outlined in **Searching for Records Stored at Iron Mountain (Section 3.5.1)** to search for and display boxes.
3. With your search results displayed, move your cursor over the record that you wish to place on hold. The record will be highlighted. You must Edit the box to place it on hold.

- Click the box icon . The Box Details tab screen opens. Click on the **Edit** button.

OR

- Select **Edit** from the **Action** dropdown menu. The Box Details tab screen opens in edit mode.

4. Click on the **Assign** link that is displayed in the Hold Codes section of the screen. The Assign Hold Codes screen opens. Only hold codes not currently assigned to this box are displayed.
5. Select one or more hold codes.
6. Click **Assign Holds**. You are returned to the Box Details tab screen

Putting a New Box on Hold

Users with the proper permissions are able to assign one hold code to a new box to prevent it from being added to a destruction order. Only hold codes that have not yet been assigned are available.

1. Select **Records Management | Collections, Add Records | Collection List (Add Records)**. The Collection List screen opens.

> **NOTE:** Customers that use Iron Mountain's Site Validation functionality select **Records Management | Collections, Add Records | Collection List (Add Records)**.

2. Click on the **Action** dropdown menu to the right of the box and select Edit from the dropdown list. The box record opens with the Box Details screen displayed.

> **NOTE:** New Box icons are clickable. Use them as a shortcut to open the View Box screen instead of using the **Action** dropdown selections.

3. Enter a hold code or click on the hold code lookup to select and assign a hold code.

4. Click **Save**. The box is placed on hold and the hold icon is displayed at the top of the Box Details screen, as well as on the Collection List screen.

> **NOTE:** Users with the multi-item edit permission are able to assign a hold to up to 100 boxes at a time using the **Multi-Item Edit functionality**.

3.2.13.2 Removing a Hold from a Box

Use the following sections to learn how to remove hold codes from new and existing (at Iron Mountain) boxes.

Removing a Hold from an Existing Box

Users with the proper permissions are able to remove one or more hold codes from a box. Once all hold codes have been removed from a box, its retention fields govern its destruction eligibility.

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.

2. Follow the steps outlined in **Searching for Records Stored at Iron Mountain (Section 3.5.1)** to search for and display boxes. Boxes with one or more hold codes assigned to them are indicated by the On Hold box icon.

3. With your search results displayed, move your cursor over the record that you wish to remove a hold from. The record will be highlighted. You must Edit the box to remove its hold codes.

Click the On Hold box icon ![icon]. The Box Details screen opens. Click on the **Edit** button.

Select **Edit** from the **Action** dropdown. The Box Detail tab screen opens in edit mode.

4. Click on the Remove link that is displayed in the Hold Codes section of the screen. The Remove Hold Codes screen opens. Only hold codes currently assigned to this box are displayed.

5. Select one or more hold codes.

6. Click **Remove Holds**. You are returned to the Box Details tab screen.

> **NOTE:** The hold code(s) that you have selected are **NOT** removed until you **SAVE** the box.

7. Click **Save**. The hold code(s) is removed from the box. Once all hold codes have been removed from a box, its retention fields govern its destruction eligibility.

Removing a Hold from a New Box

> **NOTE:** Users with the multi-item edit permission are able to remove a hold from up to 100 boxes at a time using the **Multi-Item Edit functionality (Section 3.2.8)**.

3.2.13.3 Determining Why a Box is on Hold

Boxes that are on hold cannot be added to a destruction order. Boxes on hold are clearly marked with a hold icon that is displayed on the Search Results screen, the Box Details screen and in the retrieval basket. The icon is a clear visual indicator that the box cannot be destroyed.

A box that is on hold can be viewed, edited and placed on a retrieval order. A box can have multiple hold codes assigned to it.

To understand why the box has been placed on hold:

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.
2. Follow the steps outlined in **Searching for Records Stored at Iron Mountain (Section 3.5.1)** to search for and display boxes. Boxes with one or more hold codes assigned to them are indicated by the On Hold box icon.
3. With your search results displayed, move your cursor over the record for which you wish to view hold codes. The record will be highlighted.
4. Click on the On Hold box icon or select **View Details** from the **Action** dropdown menu. The Box Details tab screen opens.
5. Click on the **View Assigned** link that is displayed in the Hold Codes section of the screen. The Hold Codes Assigned to Box Number screen opens. A box can have multiple hold codes assigned to it. Only hold codes currently assigned to this box are displayed.
6. Click on the hold code link to open the Hold Details screen and view information about the hold, including contact information for the requester and the approver, a description of the hold and any notes about the hold.

> 📝 **NOTE:** Customer hold codes do not provide the same level of detail. Contact your system administrator if you need information about why the customer is on hold.

7. When you have finished viewing this information, click **Close** to shut the Hold Details screen.

8. Click **Cancel** to close the Hold Codes Assigned to Box Number screen and return to the Box Details screen.

3.3 Files

A file is stored inside a box at Iron Mountain. You create a file record in Iron Mountain Connect Records Management to track each physical file that you send to Iron Mountain for storage. Each new file must be stored inside a box that has already been created in Iron Mountain Connect Records Management.

Files are identified by:

- **SKP Barcode:** Unique 11-alphanumeric character code that is assigned by Iron Mountain when the box is entered into Iron Mountain Connect Records Management.
- **Key Identifier:** Iron Mountain Connect Records Management requires that you enter a value for File Description 1, which is the Key Identifier for all files. The value you enter here is displayed on the File Details screen, the Item step

of the retrieval order basket, on order confirmation emails and on the Order Info tab screen in the Track Orders selection.

File Key Identifiers

- SKP Barcode
- File Description 1*
- File Description 2
- File Description 3
- File Description 4

*The default Key Identifier; applied if a customer does not use a custom template

- **Metadata:** Information that you enter into fields on the file record. The more metadata that you enter when you create a file, the easier it is to search for and retrieve the file from storage.

📑 **NOTE:** Creating a file in Iron Mountain Connect Records Management does not place it in storage. To request that files be sent to an Iron Mountain storage facility, **enter a collection order (Section 3.10.1)**.

3.3.1 File Fields

FILE FIELDS		
Field Name	**Max. Characters**	**Description**
SKP Barcode	11	Unique barcode provided by Iron Mountain to identify a file.
Customer Box Number*	11	Customer-defined alphanumeric identifier for the box that contains the file.
Division	12	Alphanumeric identifier assigned to the division to which the file belongs.
Department	12	Alphanumeric identifier assigned to the department to which the file belongs.
Record Code	10	Customer-defined alphanumeric code that defines a record type within a division or department and indicates how the destruction date of the file is calculated.
From Date	DD/MM/YYYY	Beginning of a customer-specified date span.
To Date	DD/MM/YYYY	End of a customer-specified date span.
File Description 1*	30	Primary description of the file and its contents.
File Description 2*	30	Secondary description of the file and its contents.

File Description 3*	30	Additional description of the file and its contents.
File Description 4*	80	Additional description of the file and its contents.
Destruction Date	DD/MM/YYYY	Date on which the file is to be or was destroyed by Iron Mountain, based on customer instructions or calculated from the retention schedule of its record code.
Create Date	DD/MM/YYYY	Date the file was added to Iron Mountain Connect Records Management.
Date of Birth	DD/MM/YYYY	Date of birth of the person documented in the file.
Discharge Date	DD/MM/YYYY	Discharge date from a health care or other facility of the person documented in the file.
National Insurance Number*	nnnnnnnnn	National Insurance Number of the person documented in the file.
Alpha From	10	Beginning of a customer-defined alphanumeric sequence by which the file is classified.
Alpha To	10	The end of a customer-defined alphanumeric sequence by which the file is classified.
*Fields that can be the Key Identifier. The default key identifier is File Description 1.		

> 📑 **NOTE:** The National Insurance Number field only accepts numbers. Do not enter punctuation or spaces. For example, 123456789 is valid; 123-45-6789 is not valid.

3.3.2 Adding a New File to a New Box

Use this functionality to add a new file to a box that you have used this application to create, but that has not yet been sent to Iron Mountain storage.

> 📑 **NOTE:** File screens were intentionally designed with the buttons at the top to alert users that they are working on files, rather than boxes.

1. Select **Records Management | Collections, Add Records | Collection List (Add Records)**. The Collection List screen opens.
2. Click on the **Action** dropdown menu to the right of the box to which you need to add files and select **Add Files** from the dropdown list. The New File screen will open.

> 📑 **NOTE:** You are also able to add new files to a new box while using the **View Box** functionality.

3. The customer, division, department and SKP Barcode assigned to the box automatically default onto the file. Your organisation's data entry requirements determine which fields are displayed and required when you create a file.

> 📝 **NOTE:** When you create a file, the organisational structure defaults from the box. If your organisation is division and/or department-enabled and you have the proper permission, you are able to update the file's division and/or department.

4. To create a custom data entry layout that the application will retain from one session to another, click **Customise Layout (Section 3.2.4).**

5. Enter metadata to identify this file should you need to locate and retrieve it from storage. You must enter data in the required fields, which are marked with red asterisks (*).

   - You are required to enter a value into the Key Identifier for files, which can be an SKP Barcode or File Descriptions 1 – 6. The value you enter here will be displayed on the File Details screen, the Item step of the retrieval order basket, on order confirmation emails and on the Order Info tab screen in the **Track Orders** selection.
   - To lock fields to retain the data in the field for use in subsequently added records, click **Lock**.
   - To edit a locked field, click **Unlock**.
   - To find a value for a field, click on the dropdown menu ⌄ or the calendar icon 📅, and then select a value.

6. Enter optional destruction data (because files are typically destroyed as part of a whole box, the information that you enter in the following fields is for your use only, it does not trigger notification or destruction):

   - Record Code
   - Destruction Eligibility Date

7. Save the file. New files are displayed on the collection list under the box in which they are stored in descending order based on entry date and time. Iron Mountain Connect Records Management automatically assigns a status of *New* to new files added to new boxes.

   - Click **Save File & Close** to save this file and return to the Collection List screen where the file is displayed below the box in which it is contained.
   - Click **Save & Add Another File** to continue creating additional files inside the same box.

> 📝 **NOTE:** If a field contains invalid data or if a required field is blank, the field will be highlighted when you try to add the record. Correct your entry, and then click **Add Record**.

3.3.3 Adding a New File to an Existing Box

Use this functionality to add a new file to a box that is already in storage at Iron Mountain.

1. Select **Records Management | Collections, Add Records | Collection List (Add Records)**. The Collection List screen opens.
2. Click **Add File**. The Find Existing Box for New File screen opens.
3. Select a Customer.

4. Enter the SKP Barcode that correlates to the box that will contain this file and click **Continue**. SafeKeeperPLUS automatically registers that the SKP Barcode that you entered belongs to a box that is in storage at Iron Mountain. It automatically sets the status of the files to the status of the box. Within minutes you will be able to search for, locate and edit this file in Iron Mountain Connect Records Management.
5. The New File screen opens.
6. Tick **Add to Collection List** to display a line item for this file on the collection list. Because Iron Mountain Connect Records Management associates this file with a box that is already in storage, it is not functional on the collection list; the entry on the collection list is for reporting purposes only.
7. The customer, division, department and SKP Barcode assigned to the box automatically default onto the file. Your organisation's data entry requirements determine which fields are displayed and required when you create a file.

> **NOTE:** When you create a file, the organisational structure defaults from the box. If your organisation is division- and/or department-enabled and you have the proper permission, you are able to update the file's division and/or department.

8. To create a custom data entry layout that the application will retain from session to session, click **Customise Layout (Section 3.3.5)**.
9. Enter metadata to identify this file should you need to locate and retrieve it from storage. You must enter data in the required fields, marked with red asterisks (*).

   - File Description 1 is the Key Identifier for files. You are required to enter a value here, which will be displayed on the File Details screen, the Item step of the retrieval order Basket, on order confirmation emails and on the Order Info tab screen in the Track Orders selection.
   - **Lock fields (Section 3.3.4)** to retain the data in the field for use in subsequently added records, click **Lock**.
   - To edit a locked field, click **Unlock**.
   - To find a value for a field, click on the drop-down selector ⌄ or the calendar icon 📅, and then select a value.

10. Enter optional destruction data (because files are typically destroyed as part of a whole box, the information that you enter in the following fields is for your use only, it does not trigger notification or destruction):

    - Record Code
    - Destruction Eligibility Date

11. Save the file. New files are displayed on the collection list in descending order based on entry date and time. Iron Mountain Connect Records Management automatically assigns a status of At Iron Mountain or Checked Out from Iron Mountain to the file.

    - Click **Save File & Close** to save this file and return to the Collection List screen where the file is displayed below the box in which it is contained.
    - Click **Save & Add Another File** to continue creating additional files that will be stored inside the same box.

      > **NOTE:** If a field contains invalid data, or if a required field is blank, the field will be highlighted when you try to add the record. Correct your entry, and then click **Add Record**.

> 🗒 **NOTE:** When disabling a field, consider whether or not the field is used to calculate retention. For example, do not disable Create Date if you have a record code that is calculated 7 Years After Create Date.

3.3.4 Locking File Entry Fields

If you are adding multiple files that have identical values in one or more fields, use the *Lock* command for faster data entry. Locking a field retains the data entered in the field so that you do not need to re-enter it on subsequent new files, similar to using a template. This saves data entry time when information is replicated from file to file. You are able to lock all entry fields.

Your locked fields apply to your current Iron Mountain Connect Records Management session, or until you select a different customer or exit from **Collection List (Add Records)**.

1. Enter a value in a field on the File Details screen.
2. Click **(lock)**.
3. The value in the field changes to grey to indicate that it is locked and the lock indicator changes to **(unlock)**. This field retains the value and it is applied to all files that you create during this session.

Unlocking File Entry Fields

To unlock a file entry field, click **(unlock)**. The lock indicator changes to **(lock)** and you are able to update the information in the field.

3.3.5 Customising the File Details Screen Layout

This time-saving feature enables standard users to customise the layout of metadata fields on the File Details screen during data entry sessions. Users can enable and disable fields that their system administrator has enabled (required fields cannot be modified). They can optimise data entry by displaying only the fields they use, arranging them in the order in which they enter data and locking data to eliminate duplicate entry. The custom layout can be updated at any time during file entry.

1. From within the File Details screen, click **>Customise Layout** (located in the top right-hand corner of your screen). The Customise File Entry Layout screen opens. The settings that are displayed when you open this screen are the default settings, which are controlled by your system administrator.
2. Use the top section of the screen to customise the placement of the fields on the File Entry screen. Drag and drop the fields across the columns.

   - Columns are limited to a maximum of five fields
   - Long Description occupies two fields.

3. Use the lower section of the screen to **enable, disable and require** fields on the File Details tab screen:

    - **Enable**: Click the **Enabled** tick box; users have the option of entering information in enabled fields when creating a file

    - **Require**: Click the **Required** tick box; users must complete required fields when creating a file

    - **Disable**: Leave both the **Enabled** and **Required** tick boxes blank to disable the field so that it is not displayed on the File Details screen

> **NOTE:** When disabling a field, consider whether or not the field is used to calculate retention. For example, do not disable Create Date if you have a record code that is calculated 7 Years After Create Date.

4. **Assign default values** that are retained in the fields on the File Details screen. For example, enter *LEGAL* as the default value for the Description 2 field. Each time you create a file, *LEGAL* defaults in the Description 2 field. You are able to override the default value from within the File Details screen.
5. Click Save Layout. you are returned to the File Details tab screen and the custom layout is immediately applied.

> **NOTE:** File template settings controlled by your system administrator override custom page layouts.

Restoring Default Settings

Click **Restore Defaults** to remove the custom settings and values that you entered and restore the default settings that come from your company's box template. Next, click **Save Layout** to preserve the default settings.

> **NOTE**: Customise Layout functionality is available during file creation; it is not functional when viewing or editing a file.

3.3.6 Editing a New File

Follow the steps below to edit a new file that has not yet been stored at Iron Mountain.

1. Select **Records Management | Collections, Add Records | Collection List (Add Records)**. The Collection List screen opens.
2. Click the **Action** dropdown to the right of the file and select Edit from the dropdown list. The file record opens with the File Details screen displayed.

> **NOTE:** You are also able to edit file details while using the View File functionality.

3. Edit the file details.
4. If necessary, click the Box tab to view detailed information about the parent box.
5. Click **Save** to save your changes and return to the Collection List screen.

3.3.7 Editing Multiple Boxes or Files (Multi-Box or Multi-File Edit)

Multi-item edit enables you to add and overwrite field values on up to 100 boxes or files at once. Use this time-saving feature to quickly make bulk changes to existing records that are stored at Iron Mountain, including assigning hold codes to boxes and removing hold codes from boxes.

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.
2. **Perform a search (Section 3.5.1)** to find the records you need to edit:

    -   Items must be the same record type (boxes or files)
    -   Boxes must belong to the same customer
    -   Files must belong to the same customer, division and/or department and cannot include open shelf files

3. Click the tick box to the left of each record to select two or more boxes or files. You are able to select up to 100 records to edit at once.

📋 **NOTE:** Click the top-level multi-select tick box (located to the left of the Item Type column) to select all records displayed on the current screen.

4. Click the **Multi-Select Action** dropdown and select **Multi-Item Edit**. The Multi-Box Edit or Multi-File Edit screen opens.
5. Enter values in the appropriate fields. Your entry will overwrite the value on the selected boxes or files. You can also:

    -   **Leave a field blank**: Fields that you leave blank will not be overwritten.
    -   **Clear existing field values**: Click the **x** above the right corner of a field to create a blank entry that clears the field value from all of the selected boxes or files.
    -   **Clear a data entry mistake**: Click the **x** within a field to clear an individual entry from the Multi-Edit screen prior to confirming and overwriting.

    Refer to the sections on **Box Fields** and **File Fields** for information about the fields you are editing.

6. Click **Confirm>**.

📋 **NOTE:** Click **<Field Values** to return to the previous screen and modify any of the edits before finalising them.

7. Review the fields that you are editing and click **Finish**.
8. Iron Mountain Connect Records Management updates the field values of the selected boxes or files and adds a corresponding entry on the record's Data History tab. An email confirmation is sent to the email address on your user profile.

3.3.8 Viewing a New File

Follow the steps below to view a new file that has not yet been stored at Iron Mountain.

1. Select **Records Management | Collections, Add Records | Collection List (Add Records)**. The Collection List screen opens.
2. Click the **Action** dropdown to the right of the file and select **View File** from the dropdown list. The file record opens with the File Details screen displayed in view-only mode.

> **NOTE:** New File icons are clickable. Use them as a shortcut to open the View File screen instead of using the Action drop-down menus.

3. Review the file details:

   - Click the Box tab to view detailed information about the parent box.
   - Click the **Edit** button to **edit the file details (Section 3.3.6)**.

4. Click **Close** to return to the Collection List screen.

3.3.9 Removing a File from an Existing Box

Removing a file clears it from the collection list, however, it does not permanently remove the file record. If you remove the <u>only</u> file in an <u>existing</u> box, Iron Mountain Connect Records Management automatically removes both the box and the file from the collection list.

1. Select **Records Management | Collections, Add Records | Collection List (Add Records)**. The Collection List screen opens.
2. Click the **Action** drop-down menu to the right of the file you wish to remove from the collections list and select **Remove File** from the drop-down list.
3. Iron Mountain Connect Records Management prompts you to ensure that you wish to remove the file from the collection list. Click **Remove**. The file is removed and a success message is displayed on the Collection List screen.

3.3.10 Calculating Retention

Retention is a fundamental component in records management programmes. A clearly defined retention programme ensures that you store the proper records at an Iron Mountain facility for the correct amount of time, and that you destroy these records in a timely manner, thereby adhering to national laws and industry regulations. Iron Mountain Connect Records Management makes it easy to effectively manage your retention programme and reduce the risks and costs associated with under and over-retention of records.

Iron Mountain Connect Records Management's flexible design enables it to meet the retention needs of a wide variety of

organisations. Due to the complex and varied nature of retention programmes, Iron Mountain's account team works with you and assesses your needs in order to set up the retention option that best meets them.

Record codes drive retention policy; they are used in Iron Mountain Connect Records Management to automatically calculate the length of time for which a record is retained. Record codes are defined at the enterprise, customer and department levels. Customers that use Iron Mountain Connect Records Management to calculate retention are required to assign a record code when creating a box or file; your retention options determine how a record code and the associated destruction data fields function.

Hold codes also play a key part in your retention programme; they enable you to override the retention fields on a record and prevent record destruction when necessary. You can apply holds on a box-by-box basis or you can apply a hold that spans an entire record code, department or customer. Together, record codes and hold codes enable you to create and manage an effective, targeted retention programme.

Retention Options

Due to the complex and varied nature of retention programmes, Iron Mountain's account team works with you and assesses your needs in order to set up the retention option that best meets them. The steps associated with each retention option are outlined in **Creating a Box**:

- **Retention is Not Calculated**: If your organisation does not use Iron Mountain Connect Records Management to calculate retention, the record code and destruction data that you enter are informational only, no automatic calculations are performed.
- **Retention is Calculated:**   If your organisation does use Iron Mountain Connect Records Management to calculate retention, the application can be set up to calculate retention as follows:
  - **Automatic Calculation from Setup Date Onwards:** Iron Mountain Connect Records Management automatically calculates retention for all boxes that you create after contracting for retention functionality. Boxes created prior to the setup date are not converted to use automatic retention calculation and do not require updating.
  - **Automatic Calculation for All Boxes:** Iron Mountain Connect Records Management automatically calculates retention for all new and existing boxes.
  - **Manual Override of Automatic Calculations:** Your organisation is able to manually override automatic calculations as necessary to accommodate exceptions. The Destruction Indicator and the Destruction Eligibility Date fields function as manual entry fields that override the record code's Destruction Eligibility Period.

3.4 Collection Lists

Use your collection list to track and manage boxes and files while they are waiting to be collected from your facility and delivered to Iron Mountain for storage. Items remain on a collection list until they are delivered to Iron Mountain and the associated SKP barcode is recorded.

Collection lists function as important record-keeping and reporting tools. They provide a document trail that you are able to export, print and retain for inventory and post-collection data entry. Depending on your service agreement with Iron Mountain, your collection list may also be used to apply data to physical boxes.

Collection lists display the following records:

NEW BOX	Box that is ready to be delivered to Iron Mountain; can contain new file(s). New boxes can be deleted from Iron Mountain Connect Records Management. Deleting a new box deletes all associated files and removes the box and files from the collection list. **Status:** New Box
NEW FILE	File that is ready to be delivered to Iron Mountain; associated with a new or existing box. Deleting a new file from a collection list deletes the file from Iron Mountain Connect Records Management. **Status:** New File
EXISTING BOX	Box that has been delivered to Iron Mountain and has an SKP barcode. Iron Mountain Connect Records Management automatically removes existing boxes from a collection list when you remove the last file in the box. You cannot manually remove an existing box from a collection list or delete an existing box from Iron Mountain Connect Records Management. **Status:** At Iron Mountain or Checked Out from Iron Mountain

After 18 months, collection list items that have not been received and stored at an Iron Mountain facility will be purged from the collection list.

Collection List Order

Boxes are entered onto the collection list in descending order by SKP Barcode. If the SKP Barcode is blank because Iron Mountain assigns it for your organisation upon receipt, boxes are ordered with the newest box at the top of the collection list.

Files are listed in the order they are added, with the newest file at the bottom of list.

The New Box and New File icons are clickable. Use them as a shortcut to open the View Box and View File screens, instead of using the Action dropdown menus.

Collection List with Iron Mountain Site Validation

If your organisation contracts to use Iron Mountain Site Validation functionality, your collection list contains the following differences:

- You are able to select a customer and sort the collection list so that only boxes and files assigned to that customer

display. Once you select a customer, the Collection Order Basket and Action dropdown menu are activated.
- You are able to select specific boxes to place on a collection order.
- File-only orders (for unboxed files that do not have associated metadata to be entered) and vault services orders are placed from within the Collection Order Basket Items screen.

3.4.1 Customising the Collection List Screen

Use the functionality built into the Collection List screen to customise the results display so that they meet your specific needs.

Add/Remove Columns

Control which columns display on the collection list.

1. Select **Records Management | Collections, Add Records | Collection List (Add Records)**. The Collection List screen opens.
2. Click the drop-down selector [v] to the right of any of the columns on the collection list.
3. Hover over the Column icon ⊞ Columns ▶ .
4. Click the tick box to the left of the column(s) that you want to include on or exclude from the Collection List screen. The screen display will update immediately to reflect your selections.
5. Click a different area of the screen to close the column selector.
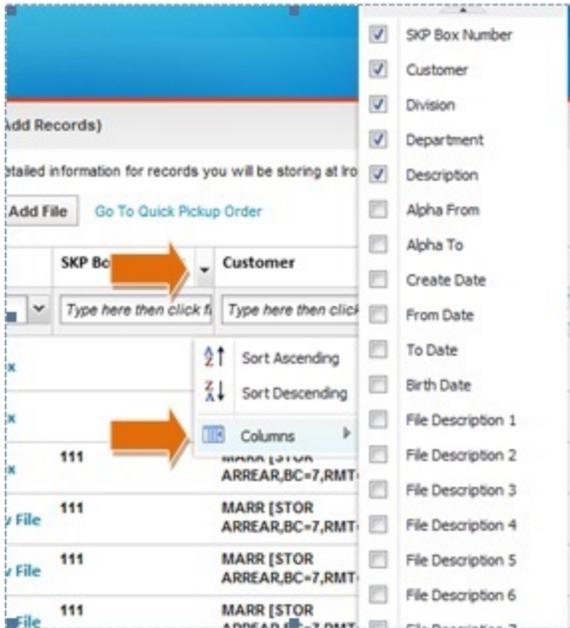
Sort Column Results

Sort the results that are displayed on the collection list in ascending or descending alphanumeric order.

1. Select **Records Management | Collections, Add Records | Collection List (Add Records)**. The Collection List screen opens.
2. Click the drop-down selector ⌄ to the right of any of the columns on the collection list.
3. Hover over the appropriate sort icon:

   - Sort in ascending alphanumeric order $\begin{smallmatrix}A\\Z\end{smallmatrix}\uparrow$
   - Sort in descending alphanumeric order $\begin{smallmatrix}Z\\A\end{smallmatrix}\downarrow$

4. Your data is immediately resorted and refreshed.
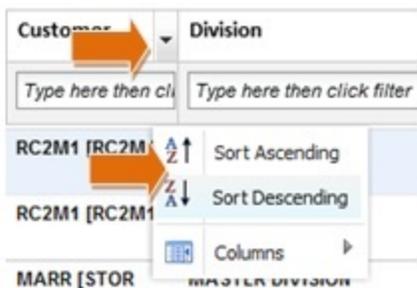
Filter Column Results

You can filter within each column of data on the collection list. Filtering allows you to narrow your search results.

1. Select **Records Management | Collections, Add Records | Collection List (Add Records)**. The Collection List screen opens.
2. Enter a letter, number or combination to filter the data that will be displayed in the column. Use the wildcard operator (*) for easier filtering.
3. Click **Filter**. Your results are displayed with your filter applied.

Reset Filters

Click the x in the filter field to clear an individual filter as opposed to using the **Reset View** button (below) to clear all filters and settings.

Move Columns

Drag and drop columns to move them into a different position in the collection list. You can customise your display based on the information you use most frequently.

Change Column Size

1. Select **Records Management | Collections, Add Records | Collection List (Add Records)**. The Collection List screen opens.
2. To change the column width, position your cursor over the edge of the column.
3. Your cursor changes to indicate that you are able to resize the column.
4. Left click and drag the column to the appropriate length.
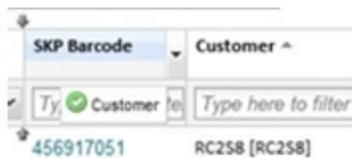
Reset the Screen

Click the **Reset View** button to clear ALL filters and restore the collection list to its **default** state. If you have changed the sort order or column size, or added, moved or removed columns, they will be reset.

📋 **NOTE:** Record Type, Status and Action columns are fixed.

3.4.2 Exporting a Collection List

Export the collection list displayed on the screen formatted as a comma delimited file (.csv). The export file contains all collection list columns; boxes and files are grouped separately and sorted by entry date.

1. Select Records **Management | Collections, Add Records | Collection List (Add Records)**. The Collection List screen opens.
2. Click the **Export** button ![export icon] .
3. Follow the export prompts to open, save or cancel the export.

3.4.3 Iron Mountain Site Validation

Organisations that require extra control over their boxes can use Iron Mountain Site Validation functionality. Iron Mountain Site Validation enables you to select the specific boxes on a collection order and communicate them in advance to Iron Mountain.   Iron Mountain validates collection, creating a traceable chain of custody.

Iron Mountain Site Validation works for both new and returning boxes. 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.

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

3.4.4 Sorting the Collection List with Iron Mountain Site Validation

If your organisation uses Iron Mountain Site Validation functionality, you are able to easily sort the collection list so that it is customer-specific. Once you have sorted the collection list, you are able to add files to boxes that are already on the collection list and view, edit and remove records from it.

1. Select **Records Management | Collections (Add Records) |Collection List (Add Records)**. The Collection List screen opens.

2. Select a customer from the **Select Customer** dropdown menu. The sort filter is applied to the collection list, and only boxes and files for that customer appear on the collection list. The **Action** dropdown menu and the Collection Basket are now activated, and you are able to place a collection order using Site Validation.

> 📋 **NOTE:** Organisations not using Iron Mountain Site Validation can use the Customer column filter, or any other column filter to sort the collection list. The Action dropdown menu and Collection Basket are activated at all times when on the Collection List screen.

3.5 Searching

3.5.1 Searching for Records Stored at Iron Mountain

Use the robust search functionality built into Iron Mountain Connect Records Management to create customised search queries that enable you to quickly locate and retrieve records stored at Iron Mountain. Once you find records, you can add them to your basket and **create a retrieval order (Section 3.9.1)** to retrieve them from storage at Iron Mountain.

> 📋 **NOTE:** Your search is restricted to the records of customers, divisions and departments to whom you have been granted access by your system administrator.

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed. The Search entry fields are blank.
2. Enter search criteria in one or more fields on the Left-side Search Bar to create a search query. Use as many or as few of the search fields as necessary:

   - Enter a keyword search. Your keyword search can be as simple as a single word or number, or can be a multi-operator search phrase. Leaving the keyword blank creates an unrestricted search. Refer to **Keywords and Column Filter Search Rules (Section 3.5.3)** and **Using Search Operators (Section 3.5.4)** for guidelines and examples of how to create a successful keyword search.
   - Select the type of record that you wish to include in your search:
     - All
     - Boxes
     - Files
   - To view only box records or file records, click ⦿ Boxes or ⦿ Files .   If your company does not list files, your search results won't contain files If your company uses open shelf file storage, your search results won't contain boxes.

     > 📋 **NOTE:** If you limit your search to only file records, only file metadata columns are available to include in the column display. If you limit your search to only boxes, only box metadata columns are available to include in the column display. If you include both files and boxes in your search, both box and file columns will be available to select.

   - If you wish to search by customer, select from the **Customer** drop-down menu. Leave this field set to **All** to include all customers in your search. Only customers to whom you have been granted organisational access by

your system administrator are available in the drop-down list.
- If you selected a customer that is division-enabled, the **Division** drop-down menu will be available. Select a division to limit the search to records that belong to only that division.
- If you selected a customer and/or division that is department-enabled, the **Department** search field will be available. Select one or more departments to limit the search to records that belong to only those departments.

    > **NOTE:** Select the Invalid Department tick box available from the Department drop-down menu to include assets not assigned to a valid department in your search results. You must search for valid and invalid departments separately.

- Search by the Record Status:

    - All
    - At Iron Mountain
    - Checked Out from Iron Mountain
    - Destroyed
    - Permanently Removed from Iron Mountain
    - Not at Iron Mountain
    - Requested; Researching

      Leave this field set to **All** to include all statuses in your search. Refer to **Record Statuses (Section 3.5.8)** for more detailed information on each of these statuses.

- If you use file groups to sequence files stored at Iron Mountain on an open shelf, File Group will be enabled. Select the groupings that you wish to include in your search.

3. Click [Search] or [>]. **Your search results are displayed (Section 3.5.9)**.

3.5.2 Improving Your Search Results

Try the following options if your search does not find the results you want:

- Confirm that you are searching for the correct record
- **Add search operators to narrow or broaden your search query (Section 3.5.4)**
- **Use column filters (Section 3.1.3)** to search within the results listed
- Use the **Reset View** button to remove all filters and return columns and filters to the default view
- Export your results to a spreadsheet, then use the Find option to locate results. This eliminates the need to page through results in Iron Mountain Connect Records Management.

> **NOTE:** If your search contains results that do not display the criteria that you searched on, it may be because the data is located in a column not currently included in your search results list. Click on the column drop-down menu [v] to

> add additional columns to your grid so that you are able to see all of the text searched by Iron Mountain Connect Records Management.

3.5.3 Keyword and Column Filter Search Rules

The following rules apply to your entries in the Keyword field and the column filters:

Capital Letters

Searches are not case-sensitive. You do not need to type capital letters. For example, searching for *SMITH* finds the same records as searching for *smith*.

Partial Words

When you search for part of a word or a character sequence, records containing related whole words or the complete character sequence will not be found. For example, searching for *smith* will not find records containing *Smithson* or *Smithville*. Instead, use the wildcard operator to search on partial words.

3.5.4 Using Search Operators

A search operator is a character or string of characters used in a search engine query to narrow and fine-tune the search. Search operators are used in the Keyword field and in the column filters in Iron Mountain Connect Records Management.

For example, a comma between search words (*Jones, Smith*) functions as the **or** search operator, expanding your results to include records containing either *Jones* or *Smith*.

You are able to combine multiple search operators.

SEARCH OPERATORS		
Operator	**Function**	**Description**
Asterisk (*)	Wildcard	Use the wildcard operator (*) in theLeft-side Search Bar and in the column filtersto quickly find partial words and records with multiple variations regardless of length or alphanumeric character. Use a single wildcard operator at the front, middle or end of a search phrase. For example, Joh* returns all records that start with *Joh*, including *John*, *Johnathon*, *Johnnie*, and *John's* and *ville returns *Smithville*, *Knoxville* and *Abbotsville*. Length of Search Phrase:

		• You <u>must</u> search on at least three characters to use the wildcard in the <u>Left-side Search Bar</u>. For example, *Joh** returns all records that start with *Joh*, including *John, Johnathon, Johnnie, John's*, etc. • You are able to search on <u>one</u> or more characters in the <u>column filters</u>. For example, *J** returns all records that start with *J*.
AND	Include	Find records that contain both words. For example, searching on *SmithAND John* returns records containing *John* and records containing *Smith*. Searching on *Smith AND John AND Leon* returns records containing *Smith* and records containing *John* and records containing *Leon*. You must enter this operator in capital letters. You are able to use this operator in conjunction with NOT.
NOT	Exclude	Eliminates all results that contain the criteria directly following NOT. For example, *NOT 2001* prevents any record that contains *2001* from being returned. You are able to use this operator in conjunction with AND and OR.
Quotation marks ("")	Phrase	Find records containing the exact phrase in quotation marks. For example, *"John Richard Smith"* returns only records containing the entire phrase *John Richard Smith*. Entries for *Richard John Smith* are not included.
OR	Or	Find records containing either word. For example, *Smith OR John* returns records containing *Smith* and records containing *John* but not both words. Searching on *SmithOR John OR Leon* returns records containing *Smith* and records containing *John* and records containing *Leon*, but not all three words. You must enter this operator in capital letters. You are able to use this operator in conjunction with NOT.
Space ( )	Or	This operator functions like OR. See above.
Comma (,)	Or	This operator functions like OR. See above.

Refer to **Searching for Dates (Section 3.5.5)** and **Searching for Numbers (Section 3.5.6)** for detailed information on how to employ search operators to successfully search these types of data.

3.5.5 Searching for Dates

Iron Mountain Connect Records Management <u>stores</u> dates in YYYY-MM-DD format and <u>displays</u> dates in DD/MM/YYYY format.

Use either format when searching for a known date. For example, type 2014-09-29 or type 29/09/2014 to search for all records from 29 September 2014.

Use the stored date format (YYYY-MM-DD) when performing an open-ended search (using the wildcard (*) operator).

- **To search for all records in a specific month and year**, type the month and year and use a wildcard to represent the day. For example, 2015-02-* will display all records for February 2015.
- **To search for all records for a specific year**, type the year (with or without a hyphen) and a wildcard. For example, 2015-* and 2015* display all records for 2015.

3.5.6 Searching for Numbers

Searching for a specific number without a wildcard operator displays results that are a precise match. For example, searching on *1* displays records with the stand-alone *1* entered, not records with *1* entered as part of a larger number.

Add the wildcard operator for a more robust numerical search.

> **NOTE:** You are able to search on a single character with a wildcard filter in the column filters; you must enter at least three characters to use the wildcard operator from the Left-side Search Bar.

For example, *1** returns ALL records that start with *1*; *176** displays 176-441, 17612 and 1766-12-1.

From within the column filters, use two wildcard operators to find all numbers containing a sequence. For example, *766** displays 17666, 33766-09-1 and 7766.

3.5.7 Example Searches

Unrestricted Search (No Keyword)

To perform an unrestricted search, leave the keyword field blank to open the keyword filter. The wildcard operator (*) defaults into the keyword field.

Either/Or Searches

To find records that contain at least one of two or more search words, type a comma <u>followed by a space</u> between the

search words.

For example, this search will find records containing either *2014* or *2015* or both.

> NOTE: Without a comma, the spaces between search words operate as *and*. For example, the search *2014 2015* finds only records with both *2014*and*2015*.

Searching Multiple Words

To search on multiple words, type *AND* between the words.

For example, this search will find all records containing Mary and Smith and 2014 in any order and in any field on the record. The words do not have to be in sequence.

Excluding Search Words

To exclude a word from a search, type NOT before the word.

For example, this search will find records containing the word *Smith*, but not the word *Mary*.

Finding Phrases (Using Quotation Marks)

To find exact phrases, type quotation marks around two or more words or character sequences in your search.

For example, this search will find records containing the adjacent words *MarySmith,* in that order.

Finding Multiple Variations (Using the Wildcard Operator)

To find words with multiple variations, type the wildcard operator (*) at the beginning middle or end of a search word, word root or other sequence of characters. You are able to use two wildcard operators when one is at the front of the sequence and one is at the end of the sequence.

For example, this search will find records containing *Smith*, *Smithson*, *Smithville*, etc.

The following search will find records that start with *sm* and end with *th*.

> **NOTE:** If you do not type the wildcard operator at the end of a word or number, only the exact word or number is searched.

Complex Queries

You can create highly focused searches by using multiple search operators. The following is an example of a complex query:

This search will find records that:

- Contain Mary AND
- Start with Smith but
- Do not contain 2015

When you use more than one search operator in a query, consider how the operators will interrelate.

3.5.8 Record Statuses

Record statuses indicate the current disposition of the item(s). The status changes when a transaction occurs. Record

status codes are used in SafeKeeperPLUS.

Record Status	Codes	Description
All		Records of all statuses.
At Iron Mountain	NRM, PUT	The item is currently in storage at Iron Mountain.
Checked Out From Iron Mountain	OUT	The item has been temporarily retrieved from storage at Iron Mountain and is currently checked out by a customer.
Destroyed	DST	The item has been destroyed by Iron Mountain at customer request, or has been authorised for destruction but is currently checked out by a customer.
Permanently Removed From Iron Mountain	WTH, DSO	The item has been permanently withdrawn from storage at Iron Mountain and returned to the customer.
Not at Iron Mountain	DSO	A destruction order for the item was submitted to Iron Mountain while the item was checked out.
Requested; Researching	RSH	The item, though listed as in storage at Iron Mountain, could not be found for order confirmation.

3.5.9 Your Search Results

The Search Results screen displays a list of records that meet your search criteria. You are able to perform multiple actions from the Search Results screen, including viewing box and file details, ordering items from storage at Iron Mountain, and narrowing your results by filtering within the results.

The Search Results screen will display up to 5,000 records, listed by their relevancy:

- Boxes are listed prior to files.
- Similar records will be ordered by status. The following fields are ranked by relevancy and will be displayed in this order:

    1. At Iron Mountain
    2. Checked Out
    3. Destroyed
    4. Permanent Withdrawal

- A box-only search that finds similar records, will order the records as follows:
    - SKP Barcode
    - Reference 1
    - Minor Description
    - Major Description
    - Long Description
    - Customer Box Number*

- A file-only search that finds similar records, will order the records as follows:
  - File Description 1
  - File Description 2
  - File Description 3
  - File Description 4

Viewing Your Search Results

1. Search for records.
2. On the Search Results screen, do one or more of the following:

- Hold the cursor over a field to display the complete content of the field in a tooltip.
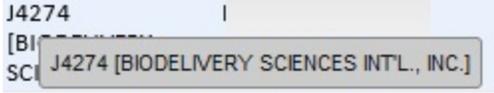
- To browse the results, use the navigation links. Refresh the data at any time and control the number of items displayed.

- To view the details of a box or file record, click its icon ⛃ BOX or 📁 FILE or select **View Details** from the **Action** drop-down menu.

3.5.10 Tasks (Actions) Available from the Search Results screen

The following actions can be performed from within the Search Results screen:

📝 **NOTE:** The actions available vary based on your system permissions and the type of record. The **Edit** drop-down menu is not available for open shelf files.

Task/Action	Click
Add a record to your Basket	Single item: **Add to Basket** button in the Action column at the right-hand side of the screen
	Multiple Items: Click the **Select** box to the left of the item,

	then select **Add to Basket** from the Multi-Select Action drop-down menu located in the upper left-hand corner of the screen
Remove a record from your Basket	Single item: **Remove** button located in the Action column at the right-hand side of the screen. This button is displayed after an item is added to the basket.
	Multiple Items: Click the **Select** box to the left of the item, then select **Remove from Basket** from the Multi-Select Action drop-down menu located in the upper left-hand corner of the screen.
View box or file details	Select **View Details** from the Action drop-down menu at the right-hand side of the screen.
Edit a record	Select **Edit** from the Action drop-down menu at the right-hand side of the screen.
Request an unlisted file from a box	While in a box, select *Request Unlisted File* from the Action drop-down menu at the right-hand side of the screen.
Request unlisted open shelf file	Click *Request Unlisted Open Shelf File* buttonat the top of the screen.

3.5.11 Searching Within Results & Applying Search Filters

If your search found too many records, you can apply column filters to narrow the results. The filters are located at the top of each column. Filters are either drop-down lists or entry fields, depending on the data in the column.

1. On the Search Results screen, type your search word in the filter column or, if the filter is a drop-down menu, select the filter from the list. You can use multiple column filters at one time. Use words, numbers or other characters occurring in the found records; add search operators to narrow and further refine your results.
2. Click **Filter**. Your results are displayed with your filter applied. The example below displays the Item Type drop-down filter set to display only BOXES and the SKP Barcode filter set to include only records *ending in 12*.

Resetting Filters

Click the x in the filter field (shown below) to clear an individual filter as opposed to using the **Reset View** button to clear all filters and settings.

Resetting Your View

Click the **Reset View** button to clear ALL filters and restore the collection list to its **default** state. If you have changed the sort order or column size, or added, moved or removed columns, they will be reset.

3.5.12 Customising the Search Results Screen

Add/Remove Columns

Control which columns are displayed on the results screens.

1. Click the drop-down selector to the right of any of the columns on the screen.
2. Hover over the Columns icon .
3. Click the tick box to the left of the column(s) that you want to include on or exclude from the screen. The screen display will update immediately to reflect your selections.
4. Click a different area of the screen to close the column selector.
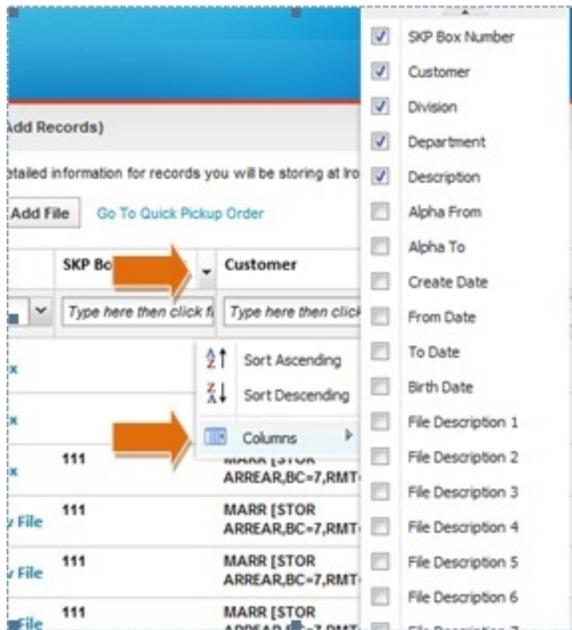
> 📋 **NOTE:** The columns available in the selector and on the Search Results screen are determined by your View Box Record Detail and View File Record Detail user permission settings, which are controlled by your system administrator.

Sort Column Results

Sort the results that are displayed in ascending or descending alphanumeric order.

1. Click the drop-down selector ⬇️ to the right of any of the columns.
2. Hover over the appropriate sort icon:

   - Sort in ascending alphanumeric order ⬆️
   - Sort in descending alphanumeric order ⬇️

4. Your data is immediately resorted and refreshed.
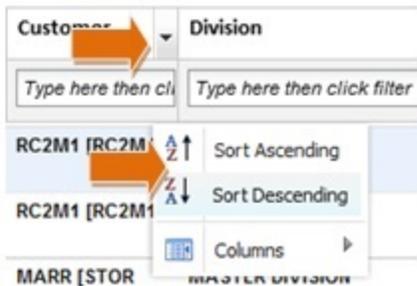
Filter Column Results

You can filter within each column of data. Filtering allows you to narrow your search results.

1. Enter a letter, number or combination to filter the data that will be displayed in the column. Use the wildcard operator (*) for easier filtering.
2. Click **Filter**. Your results are displayed with your filter applied.

Reset Filters

Click the x in the filter field to clear an individual filter as opposed to using the **Reset View** button (below) to clear all filters and settings.
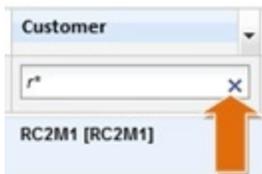
Move Columns

Drag and drop columns to move them into a different position. You can customise your display based on the information you use most frequently.

Change Column Size

1. To change the column width, position your cursor over the edge of the column.
2. Your cursor changes to indicate that you are able to resize the column.
3. Left click and drag the column to the appropriate length.
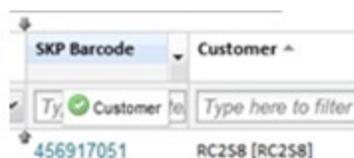
Reset the Screen

Click the **Reset View** button to clear ALL filters and restore the screen to its **default** state. If you have changed the sort order or column size, or added, moved or removed columns, they will be reset.

3.5.13 Advanced Search

3.5.13.1 Creating an Advanced Search

Advanced Search is a tool that enables you to easily build a complex, custom search that you refine and tailor to your precise needs. It provides custom capabilities that surpass the functionality available in basic search.

In Advanced Search, the organisational search filters (Customer, Division and Department), Status and File Group filters have multi-select capabilities that enable you to select and search for one, all or multiple entries in the same field.

You can use the search filters alone or with up to five search criteria, which are custom queries that you build using rules, operators and field values. Iron Mountain Connect Records Management makes building search criteria easy.

1. Select **Advanced Search** from the **Search Tools** drop-down menu located at the top of the left-side search bar. The Advanced Search screen opens.
2. Set your **search filters**. Use as many or as few of the search filters as necessary:

NOTE: Your system security settings determine whether the three Record Type options below are available. For example, if you do not have the ability to view file details, *All* and *Files*" are disabled.

- Select the type of record that you wish to include in your search:
  - All
  - Boxes
  - Files
- To view only box records or file records, click ⊙ Boxes or ⊙ Files .   If your company does not list files, your search results won't contain files If your company uses open shelf file storage, your search results won't contain boxes.

NOTE: If you limit your search to only file records, only file metadata columns are available to include in the column display. If you limit your search to only boxes, only box metadata columns are available to include in the column display. If you include both files and boxes in your search, both box and file columns will be available to select.

NOTE: Customer, Division and Department fields contain type-ahead functionality. Begin typing to filter and display all matching entries.

- Iron Mountain Connect Records Management defaults to **include records from inactive customers,**

divisions and departments in an advanced search. Inactive organisations are able to view inventory, and research and retrieve records, but cannot transact orders. Deselect the **Include Inactive** tick box to exclude records from inactive organisations from your advanced search results.

- If you wish to search by customer, select one or more customers from the **Customer** drop-down menu. Leave this field set to **All** to include all customers in your search. Only customers to whom you have been granted organisational access by your system administrator are available in the drop-down list.

> **NOTE:** Selecting multiple customers disables the Division and Department fields and Iron Mountain Connect Records Management searches only the customer level. Selecting multiple divisions disables the Department field, and Iron Mountain Connect Records Management searches only the customer and division levels.

- If you selected a customer that is division-enabled, the **Division** drop-down menu will be available. Select a division to limit the search to records that belong to only that division.
- If you selected a customer and/or division that is department-enabled, the **Department** search field will be available. Select one or more departments to limit the search to records that belong to only those departments.

> **NOTE**: Select the **Invalid Department** tick box available from the Department drop-down menu to include assets not assigned to a valid department in your search results. You must search for valid and invalid departments separately.

- Search by the Record Status:

  - All
  - At Iron Mountain
  - Checked Out from Iron Mountain
  - Destroyed
  - Permanently Removed from Iron Mountain
  - Not at Iron Mountain
  - Requested; Researching

  Leave this field set to **All** to include all statuses in your search. Refer to **Record Statuses (Section 3.5.8)** for more detailed information on each of these statuses.

- If you use file groups to sequence files stored at Iron Mountain on an open shelf, File Group will be enabled. Select the groupings that you wish to include in your search.
- Enter up to five **search criteria.** If your **export your search results (Section 3.8)**, the criteria will be included:

  Field + Rule + Value = Search Criteria

  You must select a field and a rule, and enter a value in order to run the advanced search. Iron Mountain Connect Records Management cannot search on a partially completed line of criteria.

  - Select a **Field** to be searched. Your Record Type setting determines which Fields are available. If you set

Record Type to File, only file metadata fields are available. If you set it to Box, only box metadata fields are available. If you included both files and boxes in your search, both box and file fields will be available.

- Select a **Rule (Section 3.5.13.3)** to apply logic to the Field to narrow the search. The Field you selected determines which rules are available. Iron Mountain Connect Records Management displays only the rules applicable to the field that you selected.

> **NOTE:** If you select *Is Blank* as the rule, the Value field is automatically greyed out to prevent entry.

- Type in the **Value** that will be searched. You can use the wildcard (*) and the either/or (,) search operators in the Value field to further tailor the search.
- If necessary, click **Add** ➕ and select an **Operator** to join other criteria to this one. You can add up to five total search criteria. When you join criteria, consider how the operator will interrelate with the criteria:
    - **And**: find records containing all criteria
    - **Or**: find records containing any criteria
    - **Not**: exclude records from the search

> **NOTE:** Your advanced search settings are retained during your user session; they are reset to the default settings when you log out. Iron Mountain Connect Records Management displays a link on the Search Results screen that enables you to easily return to your advanced search settings (link to Editing Your Advanced Search Settings).

3. Click **Search** or **>**. **Your search results are displayed (Section 3.5.9)**.

Resetting Your Advanced Search

When you are ready to start a new advanced search, click **Reset** ↩ to reset all settings on the entire Advanced Search screen, including the filter fields and the search criteria.

3.5.13.2 About Advanced Search Criteria

Adding Search Criteria: Examples

Single Criteria Example

To create a single criteria that finds records created after January 2014:

- Set Field to *Create Date*
- Set Rule to *Equalor after*
- Set Value to *1 January 2014*

Joined Criteria Example

Join a second set of search criteria to the first set to find records created between January 2014 and January 2015:

- Create your first set of criteria:
    - Set Field to *Create Date*
    - Set Rule to *Equalor after*
    - Set Value to *1 January 2014*
- Click **Add** ✚ to create and attach a second set of search criteria:
- Create your second set of search criteria:
    - Join the sets of criteria with the *AND* operator
    - Set Field to *Create Date*
    - Set Rule to *Equals or before*
    - Set Value to *31 January 2015*

Continue to add up to five total search criteria.

Alpha Text Range Example

Customers that do not individually list files may use Alpha Text Range as a tool when searching for a particular file. Iron Mountain Connect Records Management searches each record's Alpha From and Alpha To fields and returns results within that range. Alpha Text Range searches alphabetic groupings; it does not search numeric characters or dates.

To search Alpha Text Range, create a single criteria that includes the Alpha Text Range field:

- Set Field to *Alpha Text Range*
- Set Rule to *Contains*
- Set Value to the alpha text identifier that you are searching for

For example, *Alpha Text Range contains Norris* might return a record with Atlanta in the Alpha From field and Norristown in the Alpha To field because Norris falls between Atlanta and Norristown.

Removing Search Criteria

Click the **X** in the Value field to remove a value from within a line of search criteria.

Click the Remove ⛔ icon to the right of a line of joined search criteria to remove it.

Editing Your Advanced Search Settings

After you run your search you are able to use the link provided in the banner message at the top of the Search Results screen to return to your advanced search settings.

1. Click the link in the message. The Advanced Search screen opens.
2. Edit the settings as necessary to further refine your search.

3.5.13.3 Advanced Search Rules

Advanced Search Rules

Rule	Functionality
Begins with	Finds records containing a grouping that starts with this alphanumeric value
Between	Finds records in date range, including start and end date
Contains	Finds records containing matching alphanumeric grouping regardless of its position in the field
Ends with	Finds records containing alphanumeric grouping that ends with this value
Equals	Finds records containing an exact match of the value
Equal or after	Finds records including that date and following dates
Equal or before	Finds records including that date and prior dates
Equal or greater	Find records containing matching or larger values
Equal or less	Find records containing matching or smaller values
Is blank	Finds records with the selected field left blank

3.5.14 Creating an Advanced Search

Advanced Search is a tool that enables you to easily build a complex, custom search that you refine and tailor to your precise needs. It provides custom capabilities that surpass the functionality available in basic search.

In Advanced Search, the organisational search filters (Customer, Division and Department), Status and File Group filters have multi-select capabilities that enable you to select and search for one, all or multiple entries in the same field.

You can use the search filters alone or with up to five search criteria, which are custom queries that you build using rules, operators and field values. Iron Mountain Connect Records Management makes building search criteria easy.

1. Select **Advanced Search** from the **Search Tools** drop-down menu located at the top of the left-side search bar. The Advanced Search screen opens.
2. Set your **search filters**. Use as many or as few of the search filters as necessary:

> 📋 **NOTE:** Your system security settings determine whether the three Record Type options below are available. For example, if you do not have the ability to view file details, *All* and *Files"* are disabled.

- Select the type of record that you wish to include in your search:
  - All
  - Boxes
  - Files
- To view only box records or file records, click ⊙ Boxes or ⊙ Files . If your company does not list files, your search results won't contain files If your company uses open shelf file storage, your search results won't contain boxes.

NOTE: If you limit your search to only file records, only file metadata columns are available to include in the column display. If you limit your search to only boxes, only box metadata columns are available to include in the column display. If you include both files and boxes in your search, both box and file columns will be available to select.

NOTE: Customer, Division and Department fields contain type-ahead functionality. Begin typing to filter and display all matching entries.

- Iron Mountain Connect Records Management defaults to **include records from inactive customers, divisions and departments** in an advanced search. Inactive organisations are able to view inventory, and research and retrieve records, but cannot transact orders. Deselect the **Include Inactive** tick box to exclude records from inactive organisations from your advanced search results.
- If you wish to search by customer, select one or more customers from the **Customer** drop-down menu. Leave this field set to **All** to include all customers in your search. Only customers to whom you have been granted organisational access by your system administrator are available in the drop-down list.

NOTE: Selecting multiple customers disables the Division and Department fields and Iron Mountain Connect Records Management searches only the customer level. Selecting multiple divisions disables the Department field, and Iron Mountain Connect Records Management searches only the customer and division levels.

- If you selected a customer that is division-enabled, the **Division** drop-down menu will be available. Select a division to limit the search to records that belong to only that division.
- If you selected a customer and/or division that is department-enabled, the **Department** search field will be available. Select one or more departments to limit the search to records that belong to only those departments.

NOTE: Select the **Invalid Department** tick box available from the Department drop-down menu to include assets not assigned to a valid department in your search results. You must search for valid and invalid departments separately.

- Search by the Record Status:
  - All

- At Iron Mountain
- Checked Out from Iron Mountain
- Destroyed
- Permanently Removed from Iron Mountain
- Not at Iron Mountain
- Requested; Researching

Leave this field set to **All** to include all statuses in your search. Refer to **Record Statuses (Section 3.5.8)** for more detailed information on each of these statuses.

- If you use file groups to sequence files stored at Iron Mountain on an open shelf, File Group will be enabled. Select the groupings that you wish to include in your search.
- Enter up to five **search criteria.** If your **export your search results (Section 3.8)**, the criteria will be included:

  Field + Rule + Value = Search Criteria

You must select a field and a rule, and enter a value in order to run the advanced search. Iron Mountain Connect Records Management cannot search on a partially completed line of criteria.

- Select a **Field** to be searched. Your Record Type setting determines which Fields are available. If you set Record Type to File, only file metadata fields are available. If you set it to Box, only box metadata fields are available. If you included both files and boxes in your search, both box and file fields will be available.
- Select a **Rule (Section 3.5.13.3)** to apply logic to the Field to narrow the search. The Field you selected determines which rules are available. Iron Mountain Connect Records Management displays only the rules applicable to the field that you selected.

NOTE: If you select *Is Blank* as the rule, the Value field is automatically greyed out to prevent entry.

- Type in the **Value** that will be searched. You can use the wildcard (*) and the either/or (,) search operators in the Value field to further tailor the search.
- If necessary, click **Add** ➕ and select an **Operator** to join other criteria to this one. You can add up to five total search criteria. When you join criteria, consider how the operator will interrelate with the criteria:
  - **And**: find records containing all criteria
  - **Or**: find records containing any criteria
  - **Not**: exclude records from the search

NOTE: Your advanced search settings are retained during your user session; they are reset to the default settings when you log out. Iron Mountain Connect Records Management displays a link on the Search Results screen that enables you to easily return to your advanced search settings (link to Editing Your Advanced Search Settings).

3. Click **Search** or **>** . **Your search results are displayed (Section 3.5.9)**.

Resetting Your Advanced Search

When you are ready to start a new advanced search, click **Reset** ↰ to reset all settings on the entire Advanced Search screen, including the filter fields and the search criteria.

3.5.15 Advanced Search Rules

Advanced Search Rules

Rule	Functionality
Begins with	Finds records containing a grouping that starts with this alphanumeric value
Between	Finds records in date range, including start and end date
Contains	Finds records containing matching alphanumeric grouping regardless of its position in the field
Ends with	Finds records containing alphanumeric grouping that ends with this value
Equals	Finds records containing an exact match of the value
Equal or after	Finds records including that date and following dates
Equal or before	Finds records including that date and prior dates
Equal or greater	Find records containing matching or larger values
Equal or less	Find records containing matching or smaller values
Is blank	Finds records with the selected field left blank

3.5.16 About Advanced Search Criteria

Adding Search Criteria: Examples

Single Criteria Example

To create a single criteria that finds records created after January 2014:

- Set Field to *Create Date*
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- Set Value to *1 January 2014*

Joined Criteria Example

Join a second set of search criteria to the first set to find records created between January 2014 and January 2015:

- Create your first set of criteria:
  - Set Field to *Create Date*
  - Set Rule to *Equalor after*
  - Set Value to *1 January 2014*
- Click **Add** ✚ to create and attach a second set of search criteria:
- Create your second set of search criteria:
  - Join the sets of criteria with the *AND* operator
  - Set Field to *Create Date*
  - Set Rule to *Equals or before*
  - Set Value to *31 January 2015*

Continue to add up to five total search criteria.

Alpha Text Range Example

Customers that do not individually list files may use Alpha Text Range as a tool when searching for a particular file. Iron Mountain Connect Records Management searches each record's Alpha From and Alpha To fields and returns results within that range. Alpha Text Range searches alphabetic groupings; it does not search numeric characters or dates.

To search Alpha Text Range, create a single criteria that includes the Alpha Text Range field:

- Set Field to *Alpha Text Range*
- Set Rule to *Contains*
- Set Value to the alpha text identifier that you are searching for

For example, *Alpha Text Range contains Norris* might return a record with Atlanta in the Alpha From field and Norristown in the Alpha To field because Norris falls between Atlanta and Norristown.

Removing Search Criteria

Click the **X** in the Value field to remove a value from within a line of search criteria.

Click the Remove ⛔ icon to the right of a line of joined search criteria to remove it.

Editing Your Advanced Search Settings

After you run your search you are able to use the link provided in the banner message at the top of the Search Results screen to return to your advanced search settings.

1. Click the link in the message. The Advanced Search screen opens.
2. Edit the settings as necessary to further refine your search.

3.6 Multi-Box Search

Multi-Box search enables you to simultaneously search for and locate up to 1,000 boxes of records that are stored at Iron Mountain. This time-saving feature enables you to type in data, or cut and paste it from a spreadsheet directly into the search field.

1. Click the **Multi-Box Search** link on the Left-side Search Bar. The Multi-Box Search screen opens.
2. Select the **Customer** that the boxes belong to. The drop-down list displays only customers for whom you have been granted access by your system administrator.
3. Select the field you will use to search records:

   - SKP Barcode
   - Customer Box Number

4. Type or paste up to 1,000 SKP barcodes or customer box numbers. Press <ENTER> or use a comma, semi-colon or a space as a separator between the numbers.
5. Click **Search**. The Search Results screen opens with your results displayed. Refer to the instructions for **Entering a Retrieval Order (Section 3.9.1)** to add these items to your Basket and place them on a retrieval order.

If Items Are Not Found During a Multi-Box Search

If not all of your boxes are found during a Multi-Box Search, a banner message displays at the top of the Search Results screen.

1. Click the link in the message to view the SKP barcodes or customer box numbers for the items.
2. When you have reviewed the missing items, click **OK** to return to the Search Results screen.

3.7 Multi-File Search

Multi-File Search enables you to simultaneously search for and locate up to 1,000 files that are stored at Iron Mountain. This time-saving feature enables you to type in data, or **cut & paste** from a spreadsheet directly into the search field.

1. Select **Multi-File Search** from the **Search Tools** drop-down menu located at the top of the Left-side Search Bar.The Multi-File Search screen opens.
2. Select the **Customer** that the files belong to. The drop-down list displays only customers for whom you have been granted access by your system administrator.
3. Select the field you will use to search records:

   - SKP Barcode

- Customer Box Number
- File Description 1–9

4. Type or paste SKP barcodes, customer box numbers or file descriptions in the entry area. Press <ENTER> or use a comma to separate your entries.
5. Click **Search**. The Search Results screen opens with your results displayed. Refer to the instructions for **Entering a Retrieval Order (Section 3.9.1)** to add these items to your basket and place them on a retrieval order.

If Items Are Not Found During a Multi-File Search

If not all of your files are found during a Multi-File Search, a banner message displays at the top of the Search Results screen.

1. Click the link in the message to view the SKP barcodes, customer box numbers or file descriptions for the items.
2. When you have reviewed the missing items, click **OK** to return to the Search Results screen.

3.8 Exporting Search Results

Turn your search results into a custom report up to 100,000 lines long with the click of a button. Select which columns of information to include; Iron Mountain Connect Records Management processes the report in the background while you work. The end result is a report that meets your precise needs with no waiting.

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.
2. **Perform a search (Section 3.5.1)** to find the records you need to retrieve.
3. Click **Export** to generate a report containing your search results. You select which information to include:

- **Export fields to .csv file**: Include all columns, even those not currently displayed on screen
- **Export all fields except Long Description to .csv file**: Include all columns, even those not currently displayed on screen, but exclude the Long Description field
- **Export current fields to .csv file**: Include only the columns that you have included in your current search

4. Click **OK** when Iron Mountain Connect Records Management prompts you to generate the report.

> **NOTE:** The View Box Record Detail and View File Record Detail user permission settings, which are controlled by your system administrator, determine which columns are included on the report.

3.9 Retrieval Orders

3.9.1 Entering a Retrieval Order

A retrieval order is a request for one or more items to be retrieved from storage at Iron Mountain.

Iron Mountain Connect Records Management's Retrieval Order wizard leads you step-by-step through the order process, and ensures that you have entered the appropriate information, provided order details such as priority, courier and order instructions, and have had opportunities to review the order for accuracy.

> **NOTE:** Use the steps listed below to retrieve records <u>from</u> storage at Iron Mountain. Refer to **Entering a Collection Order (Section 3.10.1)** to learn how to send records <u>to</u> Iron Mountain for storage.

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.
2. **Perform a search (Section 3.5.1)** to find the records you need to retrieve.
3. Once the records are displayed on the Search Results screen, you are able to perform the following actions. The permissions set by your system administrator in your user profile determine which actions are available:

   - **Review box records (Section 3.9.1.16)** to verify that it is a box that you need to retrieve from storage at Iron Mountain, and to confirm the files that it contains.
   - **Review file records (Section 3.9.1.17)**t o verify that this is a file that you need to retrieve from storage at Iron Mountain.
   - **Edit box and file records (Section 3.9.1.14)** to make any necessary changes to the records and add any additional information that will assist you in retrieving the record at a later date.
   - **Request an unlisted file (Section 3.9.2)** to locate a file that is stored in a box and does not have an associated file record.
   - **Request an unlisted open shelf file (Section 3.9.3)** to locate a file that is stored on a shelf and does not have an associated file record.
   - **Request an Image on Demand (IOD) (Section 3.9.4)** to have a document scanned and delivered electronically as a .pdf file.
   - **Request an X-Ray on Demand (XOD) (Section 3.9.5)** to have an X-Ray study scanned and delivered electronically via PACS.

> **NOTE:** If you do not have access to all of the files in a box, you will not be able to order the box. Contact your system administrator for access-related questions.

4. Select the items that you need to retrieve and add them to your basket.
5. Next, the Retrieval Order wizard leads you step-by-step through the order process:

   - **Retrieval Order Wizard Step 1: Retrieval Order Basket Items (Section 3.9.1.1)** Review the items in your basket, add and remove items, enter instructions that apply to the items and add order information.
   - **Retrieval Order Wizard Step 2: Retrieval Order Details (Section 3.9.1.2)** Review the delivery information that defaults for the items on the order.
   - **Retrieval Order Wizard Step 3: Retrieval Order Completion (Section 3.9.1.3)**   Your order is confirmed, and a unique order number is assigned to each type of record on the order. If necessary, view and cancel your order from this step in the Retrieval Order wizard.

3.9.1.1 Retrieval Order Wizard Step 1: Retrieval Order Basket Items

Review the items in your Basket, add and remove items, enter instructions that apply to the items and add order information.

1. Click on the Retrievals button. The Retrieval Order Cart Items screen opens. The items in your Basket are listed, grouped by customer.
2. Review the items in the Basket:

a. Add and remove items as necessary:

- To add items to the order, click **Add More Records**. You are taken back to the Search Results screen where you can add additional items to the Basket.
- To remove an item from the Basket, click the **Remove** button to the right of the item.
- To remove all items from the Basket, click the **Empty Basket** button.

b. Enter billing information and instructions. The billing fields that you will need to complete vary based on your company's records management hierarchy and service levels:

- If applicable, select the **Invoice to Division** and/or **Invoice to Department** that will incur the cost of this order.
- Instructions associated with the billing division or billing department default from SafeKeeperPLUS. You are able to enter instructions that apply to each specific item on this order.
- If this customer requires purchase orders, enter the purchase order number to which this order will be applied. Use the purchase order lookup to find a list of active purchase orders. Refer to **Using Purchase Orders (Section 3.1.8)** for additional information.
- If this customer uses **purchase order numbers** to apply external charges, enter the applicable code. Use the **Apply to All** button to enter the same purchase order number on each item on the customer's order.

c. For each item, select the **retrieval method (Section 3.9.1.9)** that will be used to deliver the item from storage. The service option settings in your user profile determine which retrieval methods are available to you. If you will be using the same retrieval for multiple items in your basket, set a **default retrieval method**.

d. If necessary, **change the user requesting the item (Section 3.9.1.8)**.

e. **Review and edit unlisted file requests (Section 3.9.2.3).**

3. After you have reviewed the items in the Basket, deselect any items that need further review before entering retrieval details. To deselect items:

- Click the tick box to the left of each box icon or file icon so that it is empty.
- Click **Deselect All** at the top of the screen to deselect all items on the order. You can then manually select the individual items for which you will enter retrieval order details.

4. Click **Next>** to move to the Retrieval Details step in the Retrieval Order wizard. Refer to **Retrieval Order Wizard Step 2: Retrieval Order Details (Section 3.9.1.2)**.

3.9.1.2 Retrieval Order Wizard Step 2: Retrieval Order Details

Review the delivery information that defaults for the items on the order.

1. After you finish the Retrieval Order Basket Items step and click **Next>,** the Retrieval Order Details screen opens.
2. If you have NOT **set a default address (Section 3.1.1)**, the Shipping Address List screen is displayed. Select the address to which the items will be delivered.

    - Use the **sort functionality (Section 3.1.3)** to reorder and more easily locate addresses
    - **Set default and favourite addresses (Section 3.1.1)**

3. The Retrieval Order Details screen opens with the delivery address that you selected displayed. Review and edit the default delivery and shipping information. The order items are listed at the bottom of the screen grouped by customer.

    a. Verify the collection address on the order. Click **Change Address** to select a different address and contact for the order, or to **create a new address (Section 2.8.10)** that will be used on this order and that will be retained in the centralised address repository for future use.

    b. If necessary, change the Delivery Contact.

    - Click **Use My Contact Information** to overwrite the default contact with your name and phone number. This information defaults from your user profile.
    - Manually type contact information for a different contact.
    - Contact your system administrator if you need assistance updating the default delivery contact information.

4. Select a **Shipping Priority** to set the date and time for the collection. The shipping priorities available depend on the customer's **service priorities (Section 2.2.11)**, as well as the service level options set in your **user profile (Section 2.1.8)**. To set a date beyond the next working day, select **Scheduled**, and then type a date in DD/MM/YYYY format, or click and select a date.
5. Select a **courier**. If you choose to have the order delivered by a third-party courier, you will be required to complete the additional third party fields that display:

    - **courier**: Name of the shipping company that will handle transport
    - **Account**: Account number being billed for the delivery
    - **Priority**: Shipping priority

6. If necessary update the **email addresses** of the contacts that will receive notifications about this order. Separate emails are sent for each type of retrieval order: Image on Demand, X-Ray on Demand, Permanent Withdrawal and Retrieval. The primary contact receives all notification, confirmation and cancellation emails. Non-primary email addresses will receive confirmation emails, but will not receive cancellation or delivery confirmation emails.

7. Enter any **instructions** that apply to the whole order.
8. If there is an internal routing address that is associated with this order, click the **Add Internal Routing Address** link to open the Shipping Address List screen shown in step 1 and select the address for this order. Change the internal delivery contact as necessary.
9. Click **Place Your Order**. Iron Mountain Connect Records Management processes your order. Make sure you keep your browser window open until the application has finished processing and you are taken to the Retrieval Order Completion step in the Retrieval Order wizard. Refer to **Retrieval Order Wizard Step 3: Retrieval Order Completion (Section 3.9.1.3)**.

3.9.1.3 Retrieval Order Wizard Step 3: Retrieval Order Completion

Retrieval Order Completion is the final step in the Retrieval Order wizard. Iron Mountain Connect Records Management displays asuccessmessagethat confirms that your order has been successfully submitted and assigns a status of *Submitted for Processing*. You are also able to review and cancel the order from this step in the wizard if necessary.

Iron Mountain Connect Records Management creates a separate order for each type of retrieval order, and assigns a unique order number to each type: Image on Demand, X-Ray on Demand, Permanently Withdrawn and Retrieval.

A confirmation is emailed to each address that you entered in the Email Confirmation section in the Order Details step of the wizard. The primary contact will receive all notification, confirmation and cancellation emails.

Once you have completed the order, you are able to:

- **Continue Processing Retrieval Orders:** Click **<Back to Search** to return to the Search Results screen and begin a new retrieval order.
- **Review the Order**:
    1. Click the **Order Number** link or click the **View Order** button. The Order screen opens with the Order Information tab displayed.
    2. Click the Order History tab to view transactions associated with the order.
    3. When you are finished reviewing the order, click **Close**.
- **Cancel an Order (Section 3.13.1)**

> 📋 **NOTE:** Should you receive a system error while placing an order, your order items will remain in the basket. Return to Iron Mountain Connect Records Management and complete processing at a later time.

3.9.1.4 Users: Creating a Shipping Address While Entering an Order

Iron Mountain Connect Records Management enables you to create a new shipping address from within any of the order wizards. Seamlessly apply this new address to the order you are processing and save it in the centralised address

repository for future use.

1. From within the Details step of any of the order wizards, click **Change Address.** The Address wizard opens.
2. Click the **Add Address** button.

> 📑 **NOTE:** If you are creating a shipping address from within a retrieval order, select the customer this address applies to from the **Choose Customer** drop-down menu. You will not need to select a customer when creating a shipping address from within a collection or supply order; you selected the customer when you began entering the collection or supply order.

3. **Enter the shipping address details. (Section 2.8.4)**
4. **Select the users (Section 2.8.5)** that will be able to use this shipping address when placing an order.
5. Click **Confirm** to move to the final step in the Address wizard and review the information for this address on a single screen.
   a. To change the users assigned to this address, click **<Choose Users**. You are returned to the previous screen. Make changes as necessary.
   b. To change the address, return to the Choose Users step and click **<Address Details** to return to the Address Details screen. Make changes as necessary.
6. When you have reviewed the address, click **Use This Address**. The address is created and you are returned to the Details step in the order wizard. The address that you created defaults onto the order and is saved in the centralised address repository for future use.

To review the address, refer to **Viewing a Shipping Address (Section 2.8.6)**. To update the address, refer to **Editing a Shipping Address (Section 2.8.8)**.

3.9.1.5 Using Purchase Orders

> ⚠ Purchase Order functionality is country-specific and may not be available in your region.

Customers that use purchase order numbers to assign and track expenses are able to apply purchase order numbers from SafeKeeperPLUS to collections, retrieval and supply orders in Iron Mountain Connect Records Management. After the orders are processed, the purchase order is automatically decremented and the status is adjusted.

To be applied, a purchase order number must have an **active** status:

- Purchase order number has reached its start date and has not yet reached its expiry date
- Purchase order number has sufficient funds

Purchase Order Statuses:

- **Active**: Positive balance; current date range (appear on Lookup Purchase Order Number screen)
- **Inactive**: Start date in future (do not appear on Lookup Purchase Order Number screen)
- **Suspended**: Negative balance (do not appear on Lookup Purchase Order Number screen)

- **Closed**: Expired; end date is passed (do not appear on Lookup Purchase Order Number screen)

Applying a Purchase Order Number

Apply a purchase order number while entering the billing information during the first step in any of the order wizards (Step 1: Basket Items). The billing fields that you will need to complete vary based on your company's records management hierarchy and **service levels (Section 2.2.10)**:

1. If applicable, select the **Invoice to Division** and/or **Invoice to Department** that will incur the cost of this order. Any instructions associated with the Billing Department default from SafeKeeperPLUS and are displayed below this field.
2. Enter the purchase order number manually or use the purchase order number lookup described below to select from available purchase order numbers.

Looking Up a Purchase Order Number

1. Click the Purchase Order Lookup located to the right of the PO Number field. The Lookup Purchase Order Number screen opens. Active purchase order numbers (purchase orders that have reached their start date, have not yet reached their expiry date and have sufficient funds) are displayed based on the customer's records management hierarchy and billing requirements.
2. Click on a row to select and apply a purchase order number. The purchase order number is applied to all line items the customer has placed on the order.

> **NOTE:** Purchase orders can be created and assigned to an enterprise. If a purchase order is assigned to a company that is part of an enterprise, the Enterprise column is populated.

3.9.1.6 Calculating Retention

Retention is a fundamental component in records management programmes. A clearly defined retention programme ensures that you store the proper records at an Iron Mountain facility for the correct amount of time, and that you destroy these records in a timely manner, thereby adhering to national laws and industry regulations. Iron Mountain Connect Records Management makes it easy to effectively manage your retention programme and reduce the risks and costs associated with under and over-retention of records.

Iron Mountain Connect Records Management's flexible design enables it to meet the retention needs of a wide variety of organisations. Due to the complex and varied nature of retention programmes, Iron Mountain's account team works with you and assesses your needs in order to set up the retention option that best meets them.

Record codes drive retention policy; they are used in Iron Mountain Connect Records Management to automatically calculate the length of time for which a record is retained. Record codes are defined at the enterprise, customer and department levels. Customers that use Iron Mountain Connect Records Management to calculate retention are required to assign a record code when creating a box or file; your retention options determine how a record code and the associated destruction data fields function.

Hold codes also play a key part in your retention programme; they enable you to override the retention fields on a record and prevent record destruction when necessary. You can apply holds on a box-by-box basis or you can apply a hold that spans an entire record code, department or customer. Together, record codes and hold codes enable you to create and manage an effective, targeted retention programme.

Retention Options

Due to the complex and varied nature of retention programmes, Iron Mountain's account team works with you and assesses your needs in order to set up the retention option that best meets them. The steps associated with each retention option are outlined in **Creating a Box**:

- **Retention is Not Calculated**: If your organisation does not use Iron Mountain Connect Records Management to calculate retention, the record code and destruction data that you enter are informational only, no automatic calculations are performed.
- **Retention is Calculated:**   If your organisation does use Iron Mountain Connect Records Management to calculate retention, the application can be set up to calculate retention as follows:
  - **Automatic Calculation from Setup Date Onwards:** Iron Mountain Connect Records Management automatically calculates retention for all boxes that you create after contracting for retention functionality. Boxes created prior to the setup date are not converted to use automatic retention calculation and do not require updating.
  - **Automatic Calculation for All Boxes:** Iron Mountain Connect Records Management automatically calculates retention for all new and existing boxes.
  - **Manual Override of Automatic Calculations:** Your organisation is able to manually override automatic calculations as necessary to accommodate exceptions. The Destruction Indicator and the Destruction Eligibility Date fields function as manual entry fields that override the record code's Destruction Eligibility Period.

3.9.1.7 Managing Holds

Hold codes override the retention fields on a box and prevent record destruction when necessary. You can apply holds on a box-by-box basis or Iron Mountain can apply a hold that spans an entire record code, department or customer. Hold codes work together with record codes to enable you to create and manage an effective, targeted retention program.

3.9.1.8 Changing the Requester

The requester automatically defaults to the user logged in to Iron Mountain Connect Records Management. If you are placing this order for someone else, change the requester as show below.

1. Click the **Change User** link. The Update Requester screen opens.

2. Select the records that this change will apply to:

   - Current record only
   - All records for the current customer
   - All records in the basket

3. Highlight and click to select the new requester. You are returned to the **Retrieval Order Wizard Step 1: Retrieval Order Basket Items (Section 3.9.1.1)**. The requester has been applied based on your settings.

Modifying a Requester

The **Modify** button is not available and you are not able to modify requesters that are Iron Mountain Connect Records Management users and have an Iron Mountain Connect Records Management login ID.

1. From within the Update Requester screen, click the **Modify** button at the right of the record you need to modify.
2. Update the requester's first name, surname and email address.
3. Click **Save**. The change is entered and you are returned to the Update Requester screen.

Adding a New Requester

1. From within the Update Requester screen, click the **Add New** button.
2. Enter the requester's first name, surname and email address.
3. Click **Save**. The requester is created and you are returned to the Update Requester screen. Requesters are listed in alphanumeric order by first name. Filter or page through records to find and select the requester you created.

3.9.1.9 Retrieval Methods

The retrieval methods determine how boxes and files will be transported to and from storage. The retrieval methods you can use are set by your system administrator in your user profile.

Retrieval Method	Description
Checkout	Retrieve the item from storage at Iron Mountain and deliver it to a customer.
Permanently Withdraw	Permanently withdraw the item from storage and deliver it to a customer.
Photocopy	Mail or deliver a photocopy of the item to a customer.
Fax	Transmit a facsimile of the item to a customer.
Fax & Checkout	Transmit a facsimile and retrieve the item from storage.
Image on Demand	Retrieve an image and electronically transmit it to a customer.
X-Ray on Demand	Retrieve an x-ray and electronically transmit it to a customer.

3.9.1.10 Setting a Default Retrieval Method

Save time and effort by setting a default retrieval method that eliminates the step of manually setting the retrieval method for each item in the basket.

You can set different default retrieval methods for boxes and files, and you are able to manually change the retrieval method if individual items in your basket require a different retrieval method.

1. From within the Basket Items screen, click the **Set Retrieval Method** link that is located near the **Empty Basket** button.
2. Click the radio buttons to select one retrieval method for the boxes in your basket, and/or one method for the files in your basket.
3. Determine how long this retrieval method will remain as the default:
   - **Indefinitely**: Check the **Set as Default for Future Retrievals** checkbox to apply the selected retrieval method(s) to items currently in your basket and to items that you add to your basket during future work sessions. This setting will remain until you return to this screen and uncheck this box.
   - **This work session only**: Leave **Set as Default for Future Retrievals** unchecked to apply the default retrieval method to all items currently in your basket. It will not apply to items that you add during future work sessions.
4. Click **Update**. Iron Mountain Connect Records Management applies the default retrieval method.

3.9.1.11 Adding and Removing Records from within the Basket

You can add and remove records from within the basket as follows:

To...	Click...
Add more records to your basket	**Add Records**
Remove a record from your basket	**Remove** button on the record
Remove all the records from your basket	**Empty basket**

📄 **NOTE:** When you remove records from your basket, they are not deleted from the Iron Mountain Connect Records Management.

3.9.1.12 Adding Records to the Retrieval Basket

Once you searched and found the records that you need to retrieve, you must add the records to your basket in order to begin the checkout process. The methods that you can use and the locations from which you can add records to your basket vary depending on the type of record:

Type/Location	Steps
Single record from the Search Results screen	Select the box or file you wish to add to the basket and click **Add to Basket**.
All records displayed on Search Results screen	Click the Multi-Add tick box in the column header. Next, select **Add to Basket** from the Multi-Select Action drop-down list located in the upper left-hand portion of the screen.
Multiple records from the Search Results screen	Click the tick box to the left of the boxes and files you wish to add to the basket, then select **Add to Basket** from the Multi-Select Action drop-down menu located in the upper left-hand portion of the screen.
Box Details and File Details screens	Click **Add to Basket.**
Single or multiple unlisted files from Request Unlisted File screen	As part of the process of requesting an unlisted file.
Single or multiple unlisted open shelf files from Request Unlisted Open Shelf File screen	As part of the process of requesting an unlisted open shelf file.

3.9.1.13 Removing Records from the Retrieval Basket

The methods that you can use and the locations from which you can remove records from your basket vary depending on the type of record:

Type/Location	Steps
Single record from the Search Results screen	Select the box or file you wish to add to the basket and click **Remove**.
All records displayed on Search Results screen	Click the Multi-Add tick box in the column header. Next, select **Remove from Basket** from the Multi-Select Action drop-down list located in the upper left-hand portion of the screen.
Multiple records from the Search	Click the tick box to the left of the boxes and files

Results screen	you wish to remove from the basket, then select **Remove from Basket** from the Multi-Select Action drop-down menu located in the upper left-hand portion of the screen.
Box Details and File Details screens	Click **Remove from Basket.**
Single or multiple unlisted files from Request Unlisted File screen	Once added to the basket, unlisted files must be removed from within the Items step of the retrieval basket wizard.
Single or multiple unlisted open shelf files from Request Unlisted Open Shelf File screen	Once added to the basket, unlisted open shelf files must be removed from within the Items step of the retrieval basket wizard.

NOTE: When you remove records from your basket, they are not deleted from the Iron Mountain Connect Records Management.

3.9.1.14 Editing a Box or File

Follow the steps below to edit an existing box or file that is stored at Iron Mountain. Use the **Multi-Item Edit** functionality to edit more than one box or file at a time.

NOTE: The **Action** dropdown selections available vary based on your system permissions and the type of record. The Edit drop-down menu is not available for open shelf files.

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.
2. **Perform a search (Section 3.5.1)** to find the records you need to edit. With your search results displayed, move your cursor over the record that you wish to edit. The record will be highlighted.
3. There are two ways that you can open a record in edit mode:
   - Click the box icon or the file icon. The Box or File Details screen opens. Click the **Edit** button at the bottom.
   - Select **Edit** from the **Action** dropdown menu. The Box or File Number screen opens in edit mode with the Details tab displayed.

4. Edit the record as necessary. Refer to the sections on **Box Fields (Section 3.2.2)** and **File Fields (Section 3.3.1)** for information about the fields you are editing.
5. Click **Save**. Iron Mountain Connect Records Management saves your changes and you are returned to the Search Results screen.

3.9.1.15 Editing Multiple Boxes or Files (Multi-Box or Multi-File Edit)

Multi-item edit enables you to add and overwrite field values on up to 100 boxes or files at once. Use this time-saving feature to quickly make bulk changes to existing records that are stored at Iron Mountain, including assigning hold codes to boxes and removing hold codes from boxes.

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.
2. **Perform a search (Section 3.5.1)** to find the records you need to edit:

    - Items must be the same record type (boxes or files)
    - Boxes must belong to the same customer
    - Files must belong to the same customer, division and/or department and cannot include open shelf files

3. Click the tick box to the left of each record to select two or more boxes or files. You are able to select up to 100 records to edit at once.

NOTE: Click the top-level multi-select tick box (located to the left of the Item Type column) to select all records displayed on the current screen.

4. Click the **Multi-Select Action** dropdown and select **Multi-Item Edit**. The Multi-Box Edit or Multi-File Edit screen opens.
5. Enter values in the appropriate fields. Your entry will overwrite the value on the selected boxes or files. You can also:

    - **Leave a field blank**: Fields that you leave blank will not be overwritten.
    - **Clear existing field values**: Click the **x** above the right corner of a field to create a blank entry that clears the field value from all of the selected boxes or files.
    - **Clear a data entry mistake**: Click the **x** within a field to clear an individual entry from the Multi-Edit screen prior to confirming and overwriting.

    Refer to the sections on **Box Fields** and **File Fields** for information about the fields you are editing.

6. Click **Confirm>**.

NOTE: Click **<Field Values** to return to the previous screen and modify any of the edits before finalising them.

7. Review the fields that you are editing and click **Finish**.
8. Iron Mountain Connect Records Management updates the field values of the selected boxes or files and adds a corresponding entry on the record's Data History tab. An email confirmation is sent to the email address on your user profile.

3.9.1.16 Reviewing Box Records

You are able to review the detailed information that is associated with each box displayed on the Search Results screen.

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.
2. **Perform a search (Section 3.5.1)**to find the records you need to retrieve.
3. With your search results displayed, move your cursor over the record you wish to view. The record is highlighted.
4. Click the box icon or select **View Details** from the **Action** drop-down menu. The Box Details screen opens with the Details tab displayed.
5. Click the tabs to view the different screens:

   - **Box Details (Section 3.9.1.18)**: Detailed information about the contents of the box.
   - **Files (Section 3.9.1.20)**: A list of files stored inside the box, including descriptive information.
   - **Transaction History (Section 3.9.1.21)**: A chronological list of orders and transactions associated with the box and its contents, including the users who requested the transactions.
   - **Data History (Section 3.9.1.22)**: History of changes to the box's metadata.

4. When you have finished reviewing the record, click **Close** to return to the Search Results screen.

3.9.1.17 Reviewing File Records

You are able to review the detailed information that is associated with each file displayed on the Search Results screen.

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.
2. **Perform a search (Section 3.5.1)**to find the records you need to retrieve.
3. With your search results displayed, move your cursor over the record that you wish to view. The record will be highlighted.
4. Click the file icon or select View Details from the Action drop-down menu. The File Details screen opens with the Details tab displayed.
5. Click the tabs to view the different screens:
   - **File Details (Section 3.9.1.19)**: Detailed information about the file.
   - **Box Details (Section 3.9.1.18)**: Detailed information about the contents of the box.
   - **Transaction History (Section 3.9.1.21)**: A chronological list of orders and transactions associated with the file, including the users who requested the transactions.
   - **Data History (Section 3.9.1.22)**: History of changes to the file's metadata.

6. When you have finished reviewing the record, click **Close** to return to the Search Results screen.

3.9.1.18 Box Details Tab Screen

The Box Details tab screen displays detailed information about the contents of the box. The metadata fields listed below store the data necessary to locate boxes in storage at Iron Mountain.

> **NOTE:** Customer parameters set in SafeKeeperPLUS determine the box fields that are displayed.

Field Name	Maximum	Description

	Characters/Format	
Customer	5	Alphanumeric identifier assigned by Iron Mountain to identify a customer.
Box Division	12	Alphanumeric identifier assigned to the division to which the box belongs.
Box Department	12	Alphanumeric identifier assigned to the department to which the box belongs.
SKP Barcode *	11	Unique barcode provided by Iron Mountain to identify a box.
Customer Box Number*	11	Customer-defined alphanumeric identifier assigned to the box.
Major Description*	30	Primary description of the box.
Minor Description*	30	Secondary description of the box.
Reference 1*	25	Alphanumeric identifier.
Alpha From	10	Beginning of a customer-defined alphanumeric sequence by which the box is classified.
Alpha To	10	End of a customer-defined alphanumeric sequence by which the box is classified.
From Date	DD/MM/YYYY	Beginning of a customer-specified date span.
To Date	DD/MM/YYYY	End of a customer-specified date span.
Reference 2	25	Additional alphanumeric identifier.
Create Date	DD/MM/YYYY	Date on which the box was added to Iron Mountain Connect Records Management.
Event Date	DD/MM/YYYY	Date of an event that correlates to this box.
Long Description	2,500	Extended description of the contents of a box.
Destruction Indicator	select option Indefinite, Permanent, Undefined	Reason that the destruction of the box has been put on hold.
Destruction Date	DD/MM/YYYY	Date on which the box is to be or was destroyed by Iron Mountain, based on customer instructions or calculated from the retention schedule of its record code.
Record Code	10	Customer-defined alphanumeric code that defines a record type within a division or department and that indicates how the destruction date of a file is calculated.
*Fields that can be used as theKey identifier. The default Key Identifier is in Customer Box Number.		

> 📄 **NOTE:** Iron Mountain Connect Records Management automatically updates the box record with the Receipt Date, Location and Box Storage Size upon receipt. This information is displayed when you access the box details from within **Search, Retrieve**. If a box is put on Hold, the associated code is also displayed with the box details during **Search, Retrieve**.

3.9.1.19 File Details Tab Screen

The File Details tab screen displays detailed information about the contents of the file. The metadata fields listed below store the data necessary to locate files in storage at Iron Mountain.

3.9.1.20 Files Tab Screen

The Files tab screen displays a list of the files stored inside a box, including descriptive information. The screen contains the following columns of information:

Field Name	Description
Type	Code describing type of file, for example LAW or MED
Sequence Number	SKP-assigned number indicating the order in which the files were received and added to a single box.
File Description 1	Primary description of the file and its contents.
File Description 2	Secondary description of the file and its contents.
File Description 3	Tertiary description of the file and its contents.

3.9.1.21 Transaction History Tab Screen

The Transaction History is a chronological list of orders and transactions associated with the box and its contents or the file, including the users who requested the transactions.

The following types of transaction are displayed in the transaction history:

Codes	Transaction	Description
OUT	Checked out	The item was ordered from Iron Mountain and checked out of storage.
CHG	Customer number changed	The Customer ID associated with the item was changed.

DST	Destroyed	The item was destroyed by Iron Mountain at the customer's request.
DSO	Destruction requested; checked out	A destruction order for the item was submitted to Iron Mountain, but the item was checked out at the time.
INQ	Enquiry requested	An order enquiry about the item was made.
WTH	Permanently removed from Iron Mountain	The item was permanently removed from storage at Iron Mountain at the customer's request.
NEW	Received at Iron Mountain	The item was received at Iron Mountain for the first time.
NIF, RSH	Requested; not found	The item was ordered from Iron Mountain but was not found.
REF	Requested while not in storage at Iron Mountain	The item was ordered from Iron Mountain but was not in storage at the time.
RFL	Returned to Iron Mountain	The item was returned to Iron Mountain after having been checked out.

3.9.1.22 Data History Tab Screen

The Data History is a list of all changes to the metadata associated with a box or file. Each entry contains a date/time stamp and the pre- and post-change value.

Field Name	Description
Date/Time	Date and time the field was changed.
Data Entry Source	Application / party through which the change originated: • Iron Mountain Connect Records Management • Record Centre • Iron Mountain • eSearch • Customer Upload • SafeKeeperPLUS.com • SafeKeeperPLUS Direct
Modified By	User that entered the change.
Field	Field that was changed.
Value Before	Original value (prior to change).

Value After	Ending value (after change).

3.9.1.23 Managing Box Holds

Use the following sections to learn how to assign hold codes to and remove hold codes from new and existing (at Iron Mountain) boxes.

Putting an Existing Box on Hold

Users with the proper permissions are able to assign one or more hold codes to a box to prevent it from being added to a destruction order. Only hold codes that have not yet been assigned are available. For boxes already on hold, you are able to assign additional hold codes that have not yet been assigned to this box.

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.

2. Follow the steps outlined in **Searching for Records Stored at Iron Mountain (Section 3.5.1)** to search for and display boxes.

3. With your search results displayed, move your cursor over the record that you wish to place on hold. The record will be highlighted. You must **Edit** the box to place it on hold.

- Click on the box icon . The Box Details tab screen opens. Click on the **Edit** button.

    OR

- Select **Edit** from the **Action** dropdown menu. The Box Details tab screen opens in edit mode.

4. Click on the **Assign** link that is displayed in the Hold Codes section of the screen. The Assign Hold Codes screen opens. Only hold codes not currently assigned to this box are displayed.

5. Select one or more hold codes.

6. Click **Assign Holds**. You are returned to the Box Details tab screen.

> **NOTE**: The hold code(s) that you have selected are **NOT** assigned until you **SAVE** the box.

7. Click **Save**. The box is placed on hold and the hold icon is displayed at the top of the Box Details screen, as well as on the Search Results screen and in the retrieval basket.

Removing a Hold from an Existing Box

Users with the proper permissions are able to remove one or more hold codes from a box. Once all hold codes have been removed from a box, its retention fields govern its destruction eligibility.

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.

2. Follow the steps outlined in **Searching for Records Stored at Iron Mountain (Section 3.5.1)** to search for and display boxes. Boxes with one or more hold codes assigned to them are indicated by the On Hold box icon

 .

3. With your search results displayed, move your cursor over the record that you wish to remove a hold from. The record will be highlighted. You must Edit the box to remove its hold codes.

· Click on the On Hold box icon . The Box Details screen opens. Click on the **Edit** button.

· Select **Edit** from the Action dropdown menu. The Box Detail tab screen opens in edit mode.

4. Click on the Remove link that is displayed in the Hold Codes section of the screen. The Remove Hold Codes screen opens. Only hold codes currently assigned to this box are displayed.

5. Select one or more hold codes.

6. Click **Remove Holds**. You are returned to the Box Details tab screen.

NOTE: The hold code(s) that you have selected are **NOT** removed until you **SAVE** the box.

8. Click **Save**. The hold code(s) is removed from the box. Once all hold codes have been removed from a box, its retention fields govern its destruction eligibility.

Putting a New Box on Hold

Users with the proper permissions are able to assign one hold code to a new box to prevent it from being added to a destruction order. Only hold codes that have not yet been assigned are available.

1. Select **Records Management | Collections, Add Records | Collection List (Add Records)**. The Collection List screen opens.

NOTE: Customers that use Iron Mountain Site Validation functionality select **Records Management | Collections, Add Records | Collection List (Add Records)**.

2. Click on the **Action** dropdown menu to the right of the box and select Edit from the dropdown list. The box record opens with the Box Details screen displayed.

NOTE: New Box icons are clickable. Use them as a shortcut to open the View Box screen instead of using the

> **Action** dropdown selections.

3. Enter a hold code or click on the hold code lookup to select and assign a hold code.

4. Click **Save**. The box is placed on hold and the hold icon is displayed at the top of the Box Details screen, as well as on the Collection List screen.

Removing a Hold from a New Box

Users with the proper permissions are able to remove a hold code from a box. Once the hold code has been removed, the box's retention fields govern its destruction eligibility.

1. Select **Records Management | Collections, Add Records | Collection List (Add Records)**. The Collection List screen opens.

> 📝 **NOTE:** Customers that use Iron Mountain's Site Validation functionality select **Records Management | Collections, Add Records | Collection List (Add Records)**.

2. Click the **Action** dropdown to the right of the box and select **Edit** from the dropdown list. The box record opens with the Box Details screen displayed.

> 📝 **NOTE:** New Box icons are clickable. Use them as a shortcut to open the View Box screen instead of using the Action dropdown selections.

3. Click the x within the hold code field to clear the field and remove the hold code.

4. Click **Save**. The hold code is removed from the box and its retention fields govern its destruction eligibility.

3.9.2 Requesting an Unlisted File

An unlisted file (previously referred to as temporary files) is a file that is stored in a box but does not have a file record; the record for the unlisted file has not yet been created. Use the steps below to request an unlisted file. Once you have entered the required fields, Iron Mountain Connect Records Management allows you to add the file to your basket and retrieve the file from storage at Iron Mountain.

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.
2. **Perform a search (Section 3.5.1)** to find the records you need to retrieve.   With your search results displayed, move your cursor over the box in which the file is stored. The box record will be highlighted.

3. Select **Request Unlisted File** from the **Action** drop-down menu. The Request Unlisted File screen opens.

> 📋 **NOTE:** Use the multi-select functionality to create an unlisted file request that applies to multiple boxes of records. Click the multi-select tick box located at the left of the Item Type column to select boxes. The **Multi-Select Action** drop-down, located at the top left-hand side of the screen, becomes active as soon as two or more boxes are selected. Click the **Multi-Select Action** drop-down menu and select **Request Unlisted File(s)**.

4. Enter descriptions of the file(s). Iron Mountain uses these descriptions to locate the file(s).
5. Click **Save to List**. The descriptions are processed and added to the Unlisted File Request section in the lower portion of the screen.
6. Repeat steps 3 and 4 to request all files that you need from within this box. You are able to return at a later time and enter additional requests.
7. Click **Add to Basket**. The descriptions are combined into a single request and added to the Unlisted File Request section in the lower portion of the screen. Each request becomes an individual item in the basket. The number of items in your basket increases and a link to the requests is displayed below the Action drop-down menu.

3.9.2.1 Requesting an IOD from an Unlisted File

Iron Mountain Connect Records Management enables you to request an unlisted file and have it delivered via IOD.

1. Follow the steps to create a new **request for an unlisted file (Section 3.9.2)** or click an **Unlisted File Request** link from the Search Results or Retrieval Order Basket screen to edit an existing unlisted file request.
2. Select **Request IOD** from the **Action** drop-down menu located to the right of the line item that you need to have imaged and delivered electronically. The Request Image on Demand screen opens.
3. Enter information that will help Iron Mountain to locate the document to be scanned:

   - Enter up to 5 characters in the **Requested For** field to identify the person who requested the IOD.
   - Enter a **description** of the document that you need Iron Mountain to retrieve and scan. Iron Mountain uses this description to locate the document.

4. Click **Save to List**. Iron Mountain Connect Records Management creates a separate line item for each document request from within the same file. Line items for the same file are combined into a single IOD request and appear as one item in the basket.

> 📋 **NOTE:** You must add your request to the basket to save it. Requests will be lost if you click Cancel or close the screen before adding the request(s) to the basket.

5. Repeat steps 3 and 4 to request images of additional documents within the same file. You are able to return at a later time and enter additional requests if necessary.
6. Click **Add to Basket**. A single IOD request containing all of the IOD document line items for the file is created and added to the basket, and the basket is incremented by one. A link to view and edit the IOD request is now displayed underneath the Action drop-down button and underneath the Retrieval Method drop-down menu in the Retrieval Order Basket Items step of the retrieval order wizard.

7. Follow the steps in **Entering a Retrieval Order (Section 3.9.1)** to finish processing this IOD request.

> 📋 **NOTE:** Because an IOD request is for a document within a file and an XOD request is for a study of an x-ray, these two types of functionality are not available for a single file (i.e. if you select IOD for a file, XOD will appear greyed out).

3.9.2.2 Requesting an XOD from an Unlisted File

Iron Mountain Connect Records Management enables you to request an unlisted file and have it delivered via XOD.

1. Follow the steps to create a new **request for an unlisted file (Section 3.9.2)** or click an **Unlisted File Request** link from the Search Results or Retrieval Order Item Basket screen to edit an existing unlisted file request.
2. Select **Request XOD** from the Action drop-down menu located to the right of the line item that you need to have imaged and delivered electronically. The Request X-Ray on Demand screen opens.
3. Enter information that will help Iron Mountain locate the study to be scanned:

   - Enter the **Accession Number**, which was assigned to the x-ray by the healthcare provider when it was created.
   - Specify the **Study Name**.
   - Enter information that **describes the study** to be retrieved and scanned. Iron Mountain uses this description to locate the study.
   - Select the **study's creation date** and **time**.
   - Select the **patient's date of birth**.

4. Click **Save to List**. Iron Mountain Connect Records Management creates a separate line item for each study request from within the same file. Line items for the same file are combined into a single XOD request and appear as one item in the basket.

> 📋 **NOTE:** You must add your request to the basket to save it. Requests will be lost if you click **Cancel** or close the screen before adding the request(s) to the basket.

5. Repeat steps 3 and 4 to request images of additional studies within the same file. You are able to return at a later time and enter additional requests if necessary.
6. Click **Add to Basket**. A single XOD request containing all of the XOD study line items for the file is created and added to the basket, and the basket is incremented by one. A link to view and edit the XOD request is now displayed underneath the Action drop-down menu and underneath the Retrieval Method drop-down menu in the Retrieval Order Basket Items step of the retrieval order wizard.
7. Follow the steps in **Entering a Retrieval Order (Section 3.9.1)** to finish processing this XOD order.

> 📋 **NOTE:** Because an IOD request is for a document within a file and an XOD request is for a study of a film, these two types of functionality are not available for a single file (i.e. if you select IOD, XOD will appear greyed out).

3.9.2.3 Reviewing Unlisted File Requests

If the basket contains an unlisted file request, you are able to review and edit the request from within Retrieval Order Wizard Step 1: Retrieval Order Basket Items.

1. Click the **Edit/Review Unlisted File Request** link located below the **Retrieval Method** drop-down menu. The Edit Unlisted File screen opens.
2. Review the requests.
3. If you find a request that you need to update, highlight the request in the lower portion of the screen and click **Edit**.
4. The information from the request defaults into the edit area at the top of the screen. Make any necessary changes and click the **Save** button located under the File Description 1 entry field.
5. When you have finished reviewing and editing the unlisted file requests, click the **Save** button at the bottom of the screen.

3.9.2.4 Editing an Unlisted File Request

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.
2. Click an **Unlisted File Requests** link from the Search Results screen or click the **Basket** button to access the link available on the Retrieval Order Item Basket screen.
3. The Edit Unlisted File Requests screen opens.
4. Review the items listed on screen.
5. Select **Edit** from the Action drop-down menu located to the right of the line item.
6. Update the information in the File Description 1 and File Description 2 fields.
7. Click **Update**. Changes to the unlisted file line item are saved.
8. Click **Update Basket**. The changes to the unlisted file request are saved and added to the basket.

3.9.2.5 Removing an Unlisted File Request

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.
2. Click an **Unlisted File Requests** link from the Search Results or click the **Basket** button to access the link available on the Retrieval Order Item Basket screen.
3. The Edit Unlisted File Request screen opens. All of the line items that make up the unlisted file request are listed.
4. Select **Remove** from the Action drop-down menu located to the right of the line item. The line item is removed.
5. Repeat step 4 to remove additional line items from within this same unlisted file request.
6. Click **Update Basket**.
7. Click **Continue** to verify removal of the line item(s) from the request. If you have removed all line items, the unlisted file request is removed. If line items remain, the unlisted file request is updated and remains in the basket.

3.9.3 Requesting an Unlisted Open Shelf File

Unlisted open shelf files do not have file records and are stored on a shelf instead of being contained within a box. Use the steps below to request an unlisted open shelf file. Once you have entered the request, you can add it to your basket and retrieve the file from storage at Iron Mountain.

> **NOTE:** The functionality described in this section will not be available if your company does not contract with Iron Mountain for open shelf file storage.

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.
2. **Perform a search (Section 3.5.1)** to find the records you need to retrieve.
3. Click the **Request Unlisted Open Shelf File** button, which is located in the upper left-hand portion of your screen. The Request Unlisted Open Shelf File screen opens.
4. Select a **customer** from the drop-down list. Only customers that are enabled for Open Shelf service will be listed.
5. Select **File Group(s)** to search. Iron Mountain will search only the groups that you list in this field. Specify as many groups as necessary.
6. Enter a **description** of the file(s) in the File Description 2 field. The search word or phrase that you entered into the Keyword field in the Left-side Search Bar defaults into the File Description 1 field. Iron Mountain uses these descriptions to locate the file(s). Supplying precise information shortens the retrieval process.
7. Click **Save to List**. The data is combined into a single request and added to the Unlisted File Request section in the lower portion of the screen. Each request becomes an individual item in the basket.
8. Repeat steps 3 to 5 to request all files that you need from within this box. You are able to return at a later time and enter additional requests.
9. Click **Add to Basket**. The file requests are created and added to the basket. The number of items in your basket increases. You are able to access unlisted open shelf file requests through the Retrieval Order Basket Items step in your Retrieval Order wizard.

3.9.3.1 Requesting an IOD from an Unlisted Open Shelf File

Iron Mountain Connect Records Management enables you to request an unlisted open shelf file and have it delivered via IOD.

1. Follow the steps to create a new **request for an unlisted open shelf file (Section 3.9.3)** or locate an existing unlisted open shelf file request.
2. Select **Request IOD** from the **Retrieval Method** drop-down menu of the file that you need to have imaged and delivered electronically. The Request Image on Demand screen opens.
3. Enter information that will help Iron Mountain to locate the document to be scanned:

   - Enter up to 5 characters in the **Requested For** field to identify the person who requested the IOD.
   - Enter a **description** of the document that you need Iron Mountain to retrieve and scan. Iron Mountain uses

this description to locate the document.

4. Click **Save to List**. Iron Mountain Connect Records Management creates a separate line item for each document request from within the same file. Line items for the same file are combined into a single IOD request and appear as one item in the basket.

> 📑 **NOTE:** You must add your request to the basket to save it. Requests will be lost if you click Cancel or close the screen before adding the request(s) to the basket.

5. Repeat steps 4 to 6 to request images of additional documents within the same file. You are able to return at a later time and enter additional requests if necessary.
6. Click **Add to Basket**. A single IOD request containing all of the IOD document line items for the file is created and added to the basket, and the basket is incremented by one. A link to view and edit the IOD request is now displayed underneath the Action drop-down button and underneath the Retrieval Method drop-down menu in the Retrieval Order Basket Items step of the retrieval order wizard.
7. Follow the steps in **Entering a Retrieval Order (Section 3.9.1)** to finish processing this IOD request.

> 📑 **NOTE:** Because an IOD request is for a document within a file and an XOD request is for a study of a film, these two types of functionality are not available for a single file (i.e. if you select IOD for a file, XOD will appear greyed out).

3.9.3.2 Requesting an XOD from an Unlisted Open Shelf File

Iron Mountain Connect Records Management enables you to request an unlisted open shelf file and have it delivered via XOD.

1. Follow the steps to create a new **request for an unlisted open shelf file (Section 3.9.3)** or locate an existing unlisted open shelf file request in the Retrieval Order Item Basket.
2. Select **Request XOD** from the **Retrieval Method** drop-down menu of the file that you need to have imaged and delivered electronically. The Request X-Ray on Demand screen opens.
3. Enter information that will help Iron Mountain locate the study to be scanned:

   - Enter the **Accession Number**, which was assigned to the x-ray by the healthcare provider when it was created.
   - Specify the **Study Name**.
   - Enter information that **describes the study** to be retrieved and scanned. Iron Mountain uses this description to locate the study.
   - Select the **study's creation date** and **time**.
   - Select the **patient's date of birth**.

4. Click **Save to List**. Iron Mountain Connect Records Management creates a separate line item for each study request from within the same file. Line items for the same file are combined into a single XOD request and appear as one item in the basket.

> 📝 **NOTE:** You must add your request to the basket to save it. Requests will be lost if you click **Cancel** or close the screen before adding the request(s) to the basket.

5. Repeat steps 3 and 4 to request images of additional studies within the same file. You are able to return at a later time and enter additional requests if necessary.
6. Click **Add to Basket**. A single XOD request containing all of the XOD study line items for the file is created and added to the basket, and the basket is incremented by one. A link to view and edit the XOD request is now displayed underneath the Action drop-down menu and underneath the Retrieval Method drop-down menu in the Retrieval Order Basket Items step of the retrieval order wizard.

7. Follow the steps in **Entering a Retrieval Order (Section 3.9.1)** to finish processing this XOD order.

> 📝 **NOTE:** Because an IOD request is for a document within a file and an XOD request is for a study of a film, these two types of functionality are not available for a single file (i.e. if you select IOD for a file, XOD will appear greyed out).

3.9.3.3 Editing an Unlisted Open Shelf File Request

Once created, you must view and edit unlisted open shelf files from within the Retrieval Order Basket screen.

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.
2. Click the **Basket** button. The Retrieval Order Item Basket screen opens.
3. Click an **Unlisted Open Shelf File Requests** link from the Retrieval Order Basket screen. The Edit Unlisted File Requests screen opens.
4. Review the items listed on screen.
5. Update the information in the File Description 2 field.
6. Click **Update Basket**. The changes to the unlisted open shelf file request are saved and added to the basket.

3.9.3.4 Removing an Unlisted Open Shelf File Request

Once created, you must remove unlisted open shelf files from within the Retrieval Order Basket screen.

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed. Click the **Basket** button to open the Retrieval Order Basket Items screen.
2. From within the Retrieval Order Basket Items screen, click the Remove button for the unlisted open shelf file request that you need to remove from the retrieval order.
3. The item is removed and the number of items in the basket is updated.

3.9.4 About Image on Demand (IOD)

Image on Demand (IOD) is a scanning service for customers that store files with Iron Mountain. Customers that contract

with Iron Mountain for this time- and cost-saving delivery method can place IOD requests as part of retrieval orders. Iron Mountain retrieves and scans documents from within listed, unlisted and unlisted open shelf files, then electronically delivers those images as .pdf files.

IOD functionality is available at the file level; it cannot be used for boxes.

> **NOTE:** The functionality described in this section will not be available if your company does not contract with Iron Mountain for IOD functionality.

Click the following links for instructions on the different types of IOD requests:

- **Request an IOD from a file (Section 3.9.4.1)**
- **Request an IOD from an unlisted file (Section 3.9.2.1)**
- **Request an IOD from an unlisted open shelf file (Section 3.9.3.1)**

3.9.4.1 Requesting an IOD from a File

Use the steps below to create an IOD request for a file and add it to your basket.

> **NOTE:** Refer to **Requesting an IOD from an Unlisted File (Section 3.9.2.1)** and **Requesting an IOD from an Unlisted Open Shelf File (Section 3.9.3.1)** for directions specific to those two types of file requests.

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.
2. **Perform a search (Section 3.5.1)** for the file(s) containing the documents to be scanned.
3. Select Request IOD from the **Action** drop-down menu. The Request Image on Demand screen opens.

   > **NOTE:** Use the multi-select functionality to create an IOD request that applies to multiple files. Click the multi-select tick box located at the left of the Item Type column to select files. The **Multi-Select Action** drop-down menu, located at the top left-hand side of the screen, becomes active as soon as two or more files are selected. Click the **Multi-Select Action** drop-down menu and select **Request IOD**.

4. Enter information that will help Iron Mountain to locate the document to be scanned:

   - Enter up to 5 characters in the **Requested For** field to identify the person who requested the IOD. This information is included
   - Enter a **description** of the document that you need Iron Mountain to retrieve and scan. Iron Mountain uses this description to locate the document.

5. Click **Save to List**. Iron Mountain Connect Records Management creates a separate line item for each document request from within the same file.   Line items for the same file are combined into a single IOD request and appear as one item in the basket.

   > **NOTE:** You must add your request to the basket to save it. Requests will be lost if you click Cancel or close the screen before adding the request(s) to the basket.

6. Repeat steps 4 and 5 to request images of additional documents within the same file. You are able to return at a later time and enter additional requests if necessary.
7. Click **Add to Basket**. A single IOD request containing all of the IOD document line items for the file is created and added to the basket, and the basket is incremented by one. A link to view and edit the IOD request is now displayed underneath the Action drop-down button and underneath the Retrieval Method drop-down menu in the Retrieval Order Basket Items step of the retrieval order wizard.
8. Follow the steps in **Entering a Retrieval Order (Section 3.9.1)** to finish processing this IOD request.

> **NOTE:** Because an IOD request is for a document within a file and an XOD request is for a study of a film, these two types of functionality are not available for a single file (i.e. if you select IOD for a file, XOD will appear greyed out).

3.9.4.2 Requesting an IOD from an Unlisted File

Iron Mountain Connect Records Management enables you to request an unlisted file and have it delivered via IOD.

1. Follow the steps to create a new **request for an unlisted file (Section 3.9.2)** or click an **Unlisted File Request** link from the Search Results or Retrieval Order Basket screen to edit an existing unlisted file request.
2. Select **Request IOD** from the **Action** drop-down menu located to the right of the line item that you need to have imaged and delivered electronically. The Request Image on Demand screen opens.
3. Enter information that will help Iron Mountain to locate the document to be scanned:

   - Enter up to 5 characters in the **Requested For** field to identify the person who requested the IOD.
   - Enter a **description** of the document that you need Iron Mountain to retrieve and scan. Iron Mountain uses this description to locate the document.

4. Click **Save to List**. Iron Mountain Connect Records Management creates a separate line item for each document request from within the same file.   Line items for the same file are combined into a single IOD request and appear as one item in the basket.

> **NOTE:** You must add your request to the basket to save it. Requests will be lost if you click Cancel or close the screen before adding the request(s) to the basket.

5. Repeat steps 3 and 4 to request images of additional documents within the same file. You are able to return at a later time and enter additional requests if necessary.
6. Click **Add to Basket**. A single IOD request containing all of the IOD document line items for the file is created and added to the basket, and the basket is incremented by one. A link to view and edit the IOD request is now displayed underneath the Action drop-down button and underneath the Retrieval Method drop-down menu in the Retrieval Order Basket Items step of the retrieval order wizard.
7. Follow the steps in **Entering a Retrieval Order (Section 3.9.1)** to finish processing this IOD request.

> **NOTE:** Because an IOD request is for a document within a file and an XOD request is for a study of an x-ray, these two types of functionality are not available for a single file (i.e. if you select IOD for a file, XOD will

> appear greyed out).

3.9.4.3 Requesting an IOD from an Unlisted Open Shelf File

Iron Mountain Connect Records Management enables you to request an unlisted open shelf file and have it delivered via IOD.

1. Follow the steps to create a new **request for an unlisted open shelf file (Section 3.9.3)** or locate an existing unlisted open shelf file request.
2. Select **Request IOD** from the **Retrieval Method** drop-down menu of the file that you need to have imaged and delivered electronically. The Request Image on Demand screen opens.
3. Enter information that will help Iron Mountain to locate the document to be scanned:

    *   Enter up to 5 characters in the **Requested For** field to identify the person who requested the IOD.
    *   Enter a **description** of the document that you need Iron Mountain to retrieve and scan. Iron Mountain uses this description to locate the document.

4. Click **Save to List**. Iron Mountain Connect Records Management creates a separate line item for each document request from within the same file.   Line items for the same file are combined into a single IOD request and appear as one item in the basket.

    > **NOTE:** You must add your request to the basket to save it. Requests will be lost if you click Cancel or close the screen before adding the request(s) to the basket.

5. Repeat steps 4 to 6 to request images of additional documents within the same file. You are able to return at a later time and enter additional requests if necessary.
6. Click **Add to Basket**. A single IOD request containing all of the IOD document line items for the file is created and added to the basket, and the basket is incremented by one. A link to view and edit the IOD request is now displayed underneath the Action drop-down button and underneath the Retrieval Method drop-down menu in the Retrieval Order Basket Items step of the retrieval order wizard.
7. Follow the steps in **Entering a Retrieval Order (Section 3.9.1)** to finish processing this IOD request.

    > **NOTE:** Because an IOD request is for a document within a file and an XOD request is for a study of a film, these two types of functionality are not available for a single file (i.e. if you select IOD for a file, XOD will appear greyed out).

3.9.4.4 Requesting an IOD from within the Basket

Create an IOD request on the fly from within the basket.

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.

2. Click the **Basket** button to access the Retrieval Order Item Basket screen.
3. Select **Request IOD** from the **Retrieval Method** drop-down menu.
4. Follow steps 4 to 8 in **Requesting an IOD from a File (Section 3.9.4.1)** to complete the IOD request.

3.9.4.5 Viewing and Editing an IOD Request

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.
2. Click an **IOD Documents** link from the Search Results screen or click the **Basket** button and access the link from the Retrieval Order Items Basket screen.
3. The Request Image on Demand screen opens. Review the items listed on screen.
4. Click the **Edit** button ✏ located to the right of the IOD line item.
5. Update the information in the Requested For and Document Description fields.
6. Click **Update**. Changes to the IOD document (line item) are saved.
7. Click **Update Basket**. The changes to the IOD request are saved and added to the basket.

3.9.4.6 Removing an IOD Request

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.
2. Click an **IOD Documents** link from the Search Results or click the **Basket** button to access the link from the Retrieval Order Basket screen.
3. The Request Image on Demand screen opens. All IOD document line items are listed.
4. Click the **Remove** button 🚫 located to the right of the IOD document line item.
5. The IOD document line item is removed.
6. Repeat steps 4 and 5 to remove additional IOD document line items from within this same file.
7. Click **Update Basket**.
8. Click **Continue** to verify removal of the line item(s) from the IOD request. If you have removed all IOD document line items, the IOD request is removed. If IOD document line items remain, the IOD request is updated and remains in the basket.

3.9.4.7 After a Document or Study has been Imaged

Image on Demand (IOD): After a document has been imaged, Iron Mountain sends the requester an electronic link that provides access to the image in .pdf format.

X-Ray on Demand (XOD): After a study has been imaged, Iron Mountain delivers the XOD electronically via a picture archiving and communication system (PACS). The requester can download and save the image.

The Imaged column on the Search Results screen is set to Yes on a file that contains a document or study that was imaged previously. To add the Imaged column to your Search Results screen follow the steps outlined in the **Adding/Removing Columns** section in **Customising Results Screens (Section 3.1.3)** and select the Imaged column

3.9.5 About X-Ray on Demand (XOD)

X-Ray on Demand (XOD) provides a scanning and digitisation service for radiology customers storing analogue films with Iron Mountain. Customers that contract with Iron Mountain for this time- and cost-saving delivery method can place XOD requests as part of retrieval orders. At your request, Iron Mountain retrieves and scans studies from within films, then electronically delivers those images via a picture archiving and communication system (PACS).

XOD functionality is available at the file level; it cannot be used for boxes.

> 📋 **NOTE:** The functionality described in this section will not be available if your company does not contract with Iron Mountain for XOD functionality.

Click the following links for instructions on the different types of XOD requests:

- **Request an XOD from a file (Section 3.9.4.1)**
- **Request an XOD from an unlisted file (Section 3.9.2.1)**
- **Request an XOD from an unlisted open shelf file (Section 3.9.3.1)**

3.9.5.1 Requesting an XOD from a File

Use the steps below to create an XOD request and add it to your basket.

> 📋 **NOTE:** Refer to **Requesting an XOD from an Unlisted File (Section 3.9.2.2)** and **Requesting an XOD from an Unlisted Open Shelf File (Section 3.9.3.2)** for directions specific to those two types of file requests.

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.
2. **Perform a search (Section 3.5.1)** for the file(s) containing the studies to be scanned.
3. Select **Request XOD** from the **Action** drop-down menu. The Request Image on Demand screen opens.

> 📋 **NOTE:**   Use the multi-select functionality to create an XOD request that applies to multiple files. Click the multi-select tick box located at the left of the Item Type column to select files. The **Multi-Select Action** drop-down menu, located at the top left-hand side of the screen, becomes active as soon as two or more files are selected. Click the **Multi-Select Action** drop-down menu and select **Request XOD**.

4. Enter information that will help Iron Mountain locate the study to be scanned:

- Enter the **Accession Number**, which was assigned to the film by the healthcare provider when it was created.
- Specify the **Study Name**.
- Enter information that **describes the study** to be retrieved and scanned. Iron Mountain uses this description to locate the study.
- Select the **study's creation date** and **time**.
- Select the **patient's date of birth**.

5. Click **Save to List**. Iron Mountain Connect Records Management creates a separate line item for each study request from within the same file. Line items for the same file are combined into a single XOD request and appear as one item in the basket.

> 📄 **NOTE**: You must add your request to the basket to save it. Requests will be lost if you click **Cancel** or close the screen before adding the request(s) to the basket.

6. Repeat steps 4 and 5 to request images of additional studies within the same file. You are able to return at a later time and enter additional requests if necessary.
7. Click **Add to Basket**. A single XOD request containing all of the XOD study line items for the file is created and added to the basket, and the basket is incremented by one. A link to view and edit the XOD request is now displayed underneath the Action drop-down menu and underneath the Retrieval Method drop-down menu in the Retrieval Order Basket Items step of the retrieval order wizard.
8. Follow the steps in **Entering a Retrieval Order (Section 3.9.1)** to finish processing this XOD request.

> 📄 **NOTE:** Because an IOD request is for a document within a file and an XOD request is for a study of a film, these two types of functionality are not available for a single file (i.e. if you select IOD for a file, XOD will appear greyed out).

3.9.5.2 Requesting an XOD from an Unlisted File

Iron Mountain Connect Records Management enables you to request an unlisted file and have it delivered via XOD.

1. Follow the steps to create a new **request for an unlisted file (Section 3.9.2)** or click an **Unlisted File Request** link from the Search Results or Retrieval Order Item Basket screen to edit an existing unlisted file request.
2. Select **Request XOD** from the Action drop-down menu located to the right of the line item that you need to have imaged and delivered electronically. The Request X-Ray on Demand screen opens.
3. Enter information that will help Iron Mountain locate the study to be scanned:

- Enter the **Accession Number**, which was assigned to the x-ray by the healthcare provider when it was created.
- Specify the **Study Name**.
- Enter information that **describes the study** to be retrieved and scanned. Iron Mountain uses this description to locate the study.
- Select the **study's creation date** and **time**.
- Select the **patient's date of birth**.

4. Click **Save to List**. Iron Mountain Connect Records Management creates a separate line item for each study request from within the same file.   Line items for the same file are combined into a single XOD request and appear as one item in the basket.

> **NOTE:** You must add your request to the basket to save it. Requests will be lost if you click **Cancel** or close the screen before adding the request(s) to the basket.

5. Repeat steps 3 and 4 to request images of additional studies within the same file. You are able to return at a later time and enter additional requests if necessary.
6. Click **Add to Basket**. A single XOD request containing all of the XOD study line items for the file is created and added to the basket, and the basket is incremented by one. A link to view and edit the XOD request is now displayed underneath the Action drop-down menu and underneath the Retrieval Method drop-down menu in the Retrieval Order Basket Items step of the retrieval order wizard.
7. Follow the steps in **Entering a Retrieval Order (Section 3.9.1)** to finish processing this XOD order.

> **NOTE:** Because an IOD request is for a document within a file and an XOD request is for a study of a film, these two types of functionality are not available for a single file (i.e. if you select IOD, XOD will appear greyed out).

3.9.5.3 Requesting an XOD from an Unlisted Open Shelf File

Iron Mountain Connect Records Management enables you to request an unlisted open shelf file and have it delivered via XOD.

1. Follow the steps to create a new **request for an unlisted open shelf file (Section 3.9.3)** or locate an existing unlisted open shelf file request in the Retrieval Order Item Basket.
2. Select **Request XOD** from the **Retrieval Method** drop-down menu of the file that you need to have imaged and delivered electronically. The Request X-Ray on Demand screen opens.
3. Enter information that will help Iron Mountain locate the study to be scanned:

   - Enter the **Accession Number**, which was assigned to the x-ray by the healthcare provider when it was created.
   - Specify the **Study Name**.
   - Enter information that **describes the study** to be retrieved and scanned. Iron Mountain uses this description to locate the study.
   - Select the **study's creation date** and **time**.
   - Select the **patient's date of birth**.

4. Click **Save to List**. Iron Mountain Connect Records Management creates a separate line item for each study request from within the same file.   Line items for the same file are combined into a single XOD request and appear as one item in the basket.

> **NOTE:** You must add your request to the basket to save it. Requests will be lost if you click **Cancel** or close the screen before adding the request(s) to the basket.

5. Repeat steps 3 and 4 to request images of additional studies within the same file. You are able to return at a later time and enter additional requests if necessary.
6. Click **Add to Basket**. A single XOD request containing all of the XOD study line items for the file is created and added to the basket, and the basket is incremented by one. A link to view and edit the XOD request is now displayed underneath the Action drop-down menu and underneath the Retrieval Method drop-down menu in the Retrieval Order Basket Items step of the retrieval order wizard.

7. Follow the steps in **Entering a Retrieval Order (Section 3.9.1)** to finish processing this XOD order.

> **NOTE:** Because an IOD request is for a document within a file and an XOD request is for a study of a film, these two types of functionality are not available for a single file (i.e. if you select IOD for a file, XOD will appear greyed out).

3.9.5.4 Requesting XOD from within the Basket

Create an XOD request on the fly from within the basket.

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.
2. Click the **Basket** button to access the Retrieval Order Item Basket screen.
3. select **Request XOD** from the **Retrieval Method** drop-down menu.
4. Follow steps 4 to 8 in **Requesting an XOD from a File (Section 3.9.5.1)** to complete the XOD request.

3.9.5.5 Viewing and Editing an XOD Request

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.
2. Click an **XOD Documents** link from the Search Results screen or click the **Basket** button to access a link from the Retrieval Order Basket screen.
3. The Edit X-Ray on Demand screen opens. Review the items listed on screen.
4. Click the **Edit** button located to the right of the XOD request.
5. Update the information in the Requested For and Document Description fields.
6. Click **Update**. Changes to the XOD document (line item) are saved.
7. Click **Update Basket**. The changes to the XOD request are saved and added to the basket.

3.9.5.6 Removing an XOD Request

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.
2. Click an **XOD Studies** link from the Search Results or click the **Basket** button to access a link from the Retrieval

Order Basket screen.

3. The Request Image on Demand screen opens. All XOD study requests are listed.
4. Click the **Remove** button ⛔ located to the right of the XOD study line item.
5. The XOD study line item is removed.
6. Repeat steps 4 and 5 to remove additional XOD study line items from within this same file.
7. Click **Update Basket**.
8. Click **Continue** to confirm removal of the line item(s) from the XOD request. If you have removed all XOD study line items, the XOD request is removed. If XOD study line items remain, the XOD study is updated and remains in the basket.

3.9.5.7 After a Document or Study has been Imaged

Image on Demand (IOD): After a document has been imaged, Iron Mountain sends the requester an electronic link that provides access to the image in .pdf format.

X-Ray on Demand (XOD): After a study has been imaged, Iron Mountain delivers the XOD electronically via a picture archiving and communication system (PACS). The requester can download and save the image.

The Imaged column on the Search Results screen is set to Yes on a file that contains a document or study that was imaged previously. To add the Imaged column to your Search Results screen follow the steps outlined in the **Adding/Removing Columns** section in **Customising Results Screens (Section 3.1.3)** and select the Imaged column

3.10 Collection Orders

3.10.1 Entering a Collection Order

> ⚠ Vault Collection Service functionality is country-specific and may not be available in your region.

A collection order is a request for new or returning boxes and files to be transported from your location to an Iron Mountain storage facility. You specify the number of boxes and files to be collected, grouped by the type of container. The Collection Order wizard ensures that you have entered the appropriate order information, specified collection details such as priority, courier and order instructions, and have had opportunities to review the order for accuracy.

Customers who contract Iron Mountain's **Vault Collection Service** are able to place a collection order utilising this service.   Vault collection service provides direct transport of tapes between the customer site and a secure Iron Mountain vault by a dedicated Iron Mountain vehicle. No other stops are made; assets belonging to other customers are not carried in the vehicle. A customer that contracts vault collection service is able to create a single collection order that includes both vault collection and regular box and file collection.

If you contract Iron Mountain Site Validation functionality, please see **Entering a Collection Order with Iron Mountain Site Validation (Section 3.10.10.1)**.

> **NOTE:** Collection lists and collection orders function independently of each other in Iron Mountain Connect Records Management.

1. Select **Records Management | Collections, Add Records | Quick Collection Order**. The Quick Collection screen opens.
2. Select a **Customer**.

> **NOTE:** Changing the customer at any time during the collection order process will remove items that you have added to your basket and clear entries on the Quick Collection screen.

3. For each type of file or box to be collected, type the number of **New** and **Refile** items.
4. Click **Add to Basket**. Iron Mountain Connect Records Management increments your basket by one for each <u>type</u> of new AND refile item on the order. For example, your basket is incremented by one whether you add a single standard carton or four standard cartons.
5. Next, the Collection Order wizard leads you step-by-step through the order process starting with **Collection Order Wizard Step 1: Collection Order Basket Items (Section 3.10.2)**.

> **NOTE:** Items remain in your basket from one session to another until you complete an order or manually remove the item.

3.10.2 Collection Order Wizard Step 1: Reviewing Collection Order Items

Review the order, update order information, and add and remove line items as necessary.

1. Click the **Collection** button. The Collection Order Basket Items screen opens. The items in your basket are listed, grouped by item type.
2. Review the items in the basket :

    a. Add and remove items as necessary:

    - To change the amount of an item that you have already added to the order, enter an amount in the Number of New and Number of Returns fields and click **Update**.
    - To add a new type of item to the order, click **Add More Records**. You are taken back to the Quick Collection screen where you can add additional items to the basket.
    - To remove an item from the basket, click the **Remove** button to the right of the item.
    - To remove all items from the basket, click the **Empty Basket** button.

b. Enter billing information and instructions. The billing fields that you will need to complete vary based on your company's records management hierarchy and   service levels:

- If applicable, select the **Invoice to Division** and/or **Invoice to Department** that will incur the cost of this order.
- Instructions associated with the invoicing division or department default into the Instructions field from SafeKeeperPLUS. Use the Item Instructions field to enter instructions that apply to individual line items, rather than to the division or department.

3. Click **Next>** to move to the Collection Order Details step in the Collection Order wizard. Refer to **Collection Order Wizard Step 2: Collection Order Details. (Section 3.10.3)**

3.10.3 Collection Order Wizard Step 2: Collection Order Details

Review the collection and shipping information that defaults for the order.

1. After you finish the Collection Order Basket Items step and click **Next>**, the Collection Order Details screen opens.
2. Review and edit the default collection information. The order items are listed at the bottom of the screen grouped by type.

   a. Verify the collection address of the order. Click **Change Address** to select a different address and contact for the order, or to **create a new address (Section 2.8.10)** that will be used on this order and that will be retained in the centralised address repository for future use.

   b. If necessary, change the Collection Contact.

   - Click **Use My Contact Information** to overwrite the default contact with your name and phone number. This information defaults from your user profile.
   - Manually type contact information for a different contact.

3. Select a **Shipping Priority** to set the date and time for the collection. The shipping priorities available depend on the customer's service priority, as well as the service level options set in your user profile. To set a date beyond the next working day, select **Scheduled** and then type a date in DD/MM/YYYY format, or click [image] and select a date.
4. Select a **courier**. If you choose to have the order delivered by a third-party courier, you will be required to complete the additional third party fields that display:

   - **courier**: Name of the shipping company that will handle transport
   - **Account**: Account number being billed for the collection
   - **Priority**: Shipping priority

> **NOTE:** Orders being picked up by an Iron Mountain courier, and larger than 14.15 cubic metres or more than 75 miles from the Iron Mountain Storage facility, may be delayed. Iron Mountain will be in contact within 24 hours in

> these circumstances.

5. If necessary update the **email addresses** of the contacts who will receive notification when theorder is submitted. The primary contact receives all notification, confirmation and cancellation emails. Non-primary email addresses will receive confirmation emails, but will not receive cancellation or delivery confirmation emails.

6. Enter **instructions** that apply to the whole order. If you are using a third-party courier, the third-party information that you are required to enter supersedes these instructions.

7. If there is an internal routing address associated with this order, click the **Add Internal Routing Address** link to open the Shipping Address List screen and select the address for this order. Change the internal delivery contact as necessary.

8. Click **Place Your Order**. Iron Mountain Connect Records Management processes your order. Make sure you keep your browser window open until the application has finished processing and you are taken into the Collection Order Completion step in the Collection Order wizard. Refer to **Collection Order Wizard Step 3: Collection Order Completion (Section 3.10.4)**.

3.10.4 Collection Order Wizard Step 3: Collection Order Completion

Order Completion is the final step in the Collection Order wizard. Iron Mountain Connect Records Management displays a success message that confirms that your order has been successfully submitted and assigns a status of *Submitted for Processing* to your order.

A confirmation is emailed to each address that you entered in the Email Confirmation section in the Collection Order Details step of the wizard. The primary contact will receive all notification, confirmation and cancellation emails.

You are able to review and cancel the order from this step in the wizard if necessary.

Once you have completed the order, you are able to:

- **Continue Processing Collection Orders:** Click **<Start a New Collection Order** to return to the Quick Collection screen and begin a new collection order.
- **Review the Order:**

    1. Click the Order Number link, or click the View Order button. The Order screen opens with the Order Information tab displayed.
    2. Click the Order History tab to view transactions associated with the order.
    3. When you have finished reviewing the order, click Close.

- **Cancel an Order (Section 3.13.1)**

> **NOTE:** Should you receive a system error while placing an order, your order items will remain in the basket. Return to Iron Mountain Connect Records Management and complete processing at a later time.

3.10.5 Users: Creating a Shipping Address While Entering an Order

Iron Mountain Connect Records Management enables you to create a new shipping address from within any of the order wizards. Seamlessly apply this new address to the order you are processing and save it in the centralised address repository for future use.

1. From within the Details step of any of the order wizards, click **Change Address.** The Address wizard opens.
2. Click the **Add Address** button.

> 📋 **NOTE:** If you are creating a shipping address from within a retrieval order, select the customer this address applies to from the **Choose Customer** drop-down menu. You will not need to select a customer when creating a shipping address from within a collection or supply order; you selected the customer when you began entering the collection or supply order.

3. **Enter the shipping address details. (Section 2.8.4)**
4. **Select the users (Section 2.8.5)** that will be able to use this shipping address when placing an order.
5. Click **Confirm** to move to the final step in the Address wizard and review the information for this address on a single screen.
   a. To change the users assigned to this address, click **<Choose Users**. You are returned to the previous screen. Make changes as necessary.
   b. To change the address, return to the Choose Users step and click **<Address Details** to return to the Address Details screen. Make changes as necessary.
6. When you have reviewed the address, click **Use This Address**. The address is created and you are returned to the Details step in the order wizard. The address that you created defaults onto the order and is saved in the centralised address repository for future use.

To review the address, refer to **Viewing a Shipping Address (Section 2.8.6)**. To update the address, refer to **Editing a Shipping Address (Section 2.8.8)**.

3.10.6 Refiling an Existing Box

Use this functionality to add an existing box that is already in storage at Iron Mountain to the collection list.

1. Select **Records Management | Collections, Add Records | Quick Collection Order**. The Quick Collection screen opens.
2. Select a customer.

> 📋 **NOTE:** Changing the customer at any time during the collection order process will remove items that you have added to your basket and clear entries on the Quick Collection screen.

3. For each type of file or box to be picked up, type the number of New and Refile items.
4. Click **Add to Basket**. Iron Mountain Connect Records Management increments your basket by one for each type of **new** AND **refile** item on the order. For example, your basket is incremented by one whether you add a single standard box or four standard boxes.
5. Next, the Collection Order wizard leads you step-by-step through the order process starting with **Collection Order Wizard Step 1: Collection Order Basket Items (Section 3.10.2).**

> 📋 **NOTE:** Items remain in your basket from one session to another until you complete an order or manually remove the item.

Refiling an Existing Box with Iron Mountain Site Validation

Organisations that contract Iron Mountain Site Validation functionality use the following steps to refile an existing box.

Refiling an Existing Box with Iron Mountain Site Validation

1. Select **Records Management | Collections, Add Records | Collection List (Add Records)**. The Collection List screen opens.
2. Click **Refile Box**. The Find Existing Box screen opens.
3. Select a customer.
4. Enter the SKP Barcode that correlates to the box that will be refiled and click **Continue**. Refile boxes must have a status of *Checked Out from Iron Mountain*.
5. Save the box. Retention calculations are performed and the box appears on the collection list organized in descending order by SKP Barcode. If the SKP Barcode is blank because Iron Mountain assigns it for your organization at receipt, boxes are ordered with the newest box at the top of the collection list.

   > 📋 **NOTE**: If your user permissions force you to enter missing metadata when refiling a box and this box contains required fields that have been left blank, the Box Details screen opens. Correct the highlighted fields, and then click **Save**.

3.10.7 Using Purchase Orders

> ⚠️ Purchase Order functionality is country-specific and may not be available in your region.

Customers that use purchase order numbers to assign and track expenses are able to apply purchase order numbers from SafeKeeperPLUS to collections, retrieval and supply orders in Iron Mountain Connect Records Management. After the orders are processed, the purchase order is automatically decremented and the status is adjusted.

To be applied, a purchase order number must have an **active** status:

- Purchase order number has reached its start date and has not yet reached its expiry date
- Purchase order number has sufficient funds

Purchase Order Statuses:

- **Active**: Positive balance; current date range (appear on Lookup Purchase Order Number screen)
- **Inactive**: Start date in future (do not appear on Lookup Purchase Order Number screen)
- **Suspended**: Negative balance (do not appear on Lookup Purchase Order Number screen)
- **Closed**: Expired; end date is passed (do not appear on Lookup Purchase Order Number screen)

Applying a Purchase Order Number

Apply a purchase order number while entering the billing information during the first step in any of the order wizards (Step 1: Basket Items). The billing fields that you will need to complete vary based on your company's records management hierarchy and **service levels (Section 2.2.10)**:

1. If applicable, select the **Invoice to Division** and/or **Invoice to Department** that will incur the cost of this order. Any instructions associated with the Billing Department default from SafeKeeperPLUS and are displayed below this field.
2. Enter the purchase order number manually or use the purchase order number lookup described below to select from available purchase order numbers.

Looking Up a Purchase Order Number

1. Click the Purchase Order Lookup located to the right of the PO Number field. The Lookup Purchase Order Number screen opens. Active purchase order numbers (purchase orders that have reached their start date, have not yet reached their expiry date and have sufficient funds) are displayed based on the customer's records management hierarchy and billing requirements.
2. Click on a row to select and apply a purchase order number. The purchase order number is applied to all line items the customer has placed on the order.

> **NOTE:** Purchase orders can be created and assigned to an enterprise. If a purchase order is assigned to a company that is part of an enterprise, the Enterprise column is populated.

3.10.8 Requesting Vault Collection Service

> ⚠ Vault Collection Service functionality is country-specific and may not be available in your region.

Customers who contract for Iron Mountain's **Vault Collection Service** are able to place a collections order utilising this

service.   Vault collections service provides direct transport of tapes between the customer site and a secure Iron Mountain vault by a dedicated Iron Mountain vehicle that does not make any other stops or carry assets belonging to other customers.

A customer that contracts for vault collections service is able to create a collections order that is limited to vault collections, or a collections order that includes both vault collections and regular box and file collections. Requesting vault collections service is similar to **entering a collections order (Section 3.10.1)**.

1. Select **Records Management | Collections, Add Records | Quick Collection Order.** The Quick Collection screen opens.
2. Select a **Customer**.

> 📋 **NOTE:** Changing the customer at any time during the collections order process will remove items that you have added to your basket and clear entries on the Quick Collection screen.

3. If this collections order includes **both** vault collections service <u>and</u> box/file collections, type the number of New and Refile items for each type of file or box to be picked up.
4. Click the **Vault Collection Service** tick box located at the bottom of the list of box/file types.
5. Click **Add to Basket**. Iron Mountain Connect Records Management increments your basket by one for a vault collections order. If this order also includes box/file collections, your basket is incremented by one for each **type** of new AND refile item on the order. For example, your basket is incremented by one whether you add a single standard box or four standard boxes.
6. Next, the Collection Order wizard leads you step-by-step through the order process starting with **Collection Order Wizard Step 1: Collection Order Basket Items (Section 3.10.2)**.

> 📋 **NOTE:** Items remain in your basket from session to session until you complete an order or manually remove the item.

3.10.9 Managing Box Holds

Use the following sections to learn how to assign hold codes to and remove hold codes from new and existing (at Iron Mountain) boxes.

Putting an Existing Box on Hold

Users with the proper permissions are able to assign one or more hold codes to a box to prevent it from being added to a destruction order. Only hold codes that have not yet been assigned are available. For boxes already on hold, you are able to assign additional hold codes that have not yet been assigned to this box.

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.

2. Follow the steps outlined in **Searching for Records Stored at Iron Mountain (Section 3.5.1)** to search for and display boxes.

3. With your search results displayed, move your cursor over the record that you wish to place on hold. The record

will be highlighted. You must **Edit** the box to place it on hold.

- Click on the box icon ⬚. The Box Details tab screen opens. Click on the **Edit** button.

    OR

- Select **Edit** from the **Action** dropdown menu. The Box Details tab screen opens in edit mode.

4. Click on the **Assign** link that is displayed in the Hold Codes section of the screen. The Assign Hold Codes screen opens. Only hold codes not currently assigned to this box are displayed.

5. Select one or more hold codes.

6. Click **Assign Holds**. You are returned to the Box Details tab screen.

📄 **NOTE**: The hold code(s) that you have selected are **NOT** assigned until you **SAVE** the box.

7. Click **Save**. The box is placed on hold and the hold icon ✋ is displayed at the top of the Box Details screen, as well as on the Search Results screen and in the retrieval basket.

Removing a Hold from an Existing Box

Users with the proper permissions are able to remove one or more hold codes from a box. Once all hold codes have been removed from a box, its retention fields govern its destruction eligibility.

1. Select **Records Management | Search, Retrieve**. The Search Results screen is displayed.

2. Follow the steps outlined in **Searching for Records Stored at Iron Mountain (Section 3.5.1)** to search for and display boxes. Boxes with one or more hold codes assigned to them are indicated by the On Hold box icon ⬚✋.

3. With your search results displayed, move your cursor over the record that you wish to remove a hold from. The record will be highlighted. You must Edit the box to remove its hold codes.

- · Click on the On Hold box icon ⬚✋. The Box Details screen opens. Click on the **Edit** button.
- · Select **Edit** from the Action dropdown menu. The Box Detail tab screen opens in edit mode.

4. Click on the Remove link that is displayed in the Hold Codes section of the screen. The Remove Hold Codes screen opens. Only hold codes currently assigned to this box are displayed.

5. Select one or more hold codes.

6. Click **Remove Holds**. You are returned to the Box Details tab screen.

> **NOTE:** The hold code(s) that you have selected are **NOT** removed until you **SAVE** the box.

8. Click **Save**. The hold code(s) is removed from the box. Once all hold codes have been removed from a box, its retention fields govern its destruction eligibility.

Putting a New Box on Hold

Users with the proper permissions are able to assign one hold code to a new box to prevent it from being added to a destruction order. Only hold codes that have not yet been assigned are available.

1. Select **Records Management | Collections, Add Records | Collection List (Add Records)**. The Collection List screen opens.

> **NOTE:** Customers that use Iron Mountain Site Validation functionality select **Records Management | Collections, Add Records | Collection List (Add Records)**.

2. Click on the **Action** dropdown menu to the right of the box and select Edit from the dropdown list. The box record opens with the Box Details screen displayed.

> **NOTE:** New Box icons are clickable. Use them as a shortcut to open the View Box screen instead of using the **Action** dropdown selections.

3. Enter a hold code or click on the hold code lookup to select and assign a hold code.

4. Click **Save**. The box is placed on hold and the hold icon is displayed at the top of the Box Details screen, as well as on the Collection List screen.

Removing a Hold from a New Box

Users with the proper permissions are able to remove a hold code from a box. Once the hold code has been removed, the box's retention fields govern its destruction eligibility.

1. Select **Records Management | Collections, Add Records | Collection List (Add Records)**. The Collection List screen opens.

> **NOTE:** Customers that use Iron Mountain's Site Validation functionality select **Records Management | Collections, Add Records | Collection List (Add Records)**.

2. Click the **Action** dropdown to the right of the box and select **Edit** from the dropdown list. The box record opens with the Box Details screen displayed.

> **NOTE:** New Box icons are clickable. Use them as a shortcut to open the View Box screen instead of using the Action dropdown selections.

3. Click the x within the hold code field to clear the field and remove the hold code.

4. Click **Save**. The hold code is removed from the box and its retention fields govern its destruction eligibility.

3.10.10   Iron Mountain Site Validation

Organisations that require extra control over their boxes can use Iron Mountain Site Validation functionality. Iron Mountain Site Validation enables you to select the specific boxes on a collection order and communicate them in advance to Iron Mountain.   Iron Mountain validates collection, creating a traceable chain of custody.

Iron Mountain Site Validation works for both new and returning boxes. 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.

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

3.10.10.1   Entering a Collection Order with Iron Mountain Site Validation

> **NOTE:** Organisations that contract Iron Mountain Site Validation functionality follow different steps to enter file-only and vault collection orders.

1. Select **Records Management | Collection, Add Records | Collection List (Add Records)**. The Collection List screen opens.
2. Iron Mountain Connect Records Management performs Site Validation for a single customer at a time. Select a customer to sort the collection list, and to activate the collection basket, **Action** dropdown menu and **multi-select functionality**.

> **NOTE:** Changing the customer after you have added items to the basket will delete all new items and remove existing items from the collection list.

3. If necessary, **add new boxes**, **add new files (Section 3.3.3)** and/or **add existing boxes (Section 3.2.10)** to the collection list.
4. Once you have added items to the collection list, select **new** and refile boxes and click **Add to Basket**. Iron Mountain Connect Records Management increments your basket by one for each item on the order.

> 📄 **NOTE:** File-only line items do not have an **Add to Basket** button; they are added from the Collection Order Basket Items screen.

5. Click on the basket button. The Collection Order wizard leads you step-by-step through the order process starting with **Collection Order Wizard Step 1: Collection Order Basket Items (Section 3.10.2)**.

> 📄 **NOTE:** Items remain in your basket from one session to another until you complete an order or manually remove the item.

3.10.10.2 Placing File-Only and Vault Collection Service Orders with Iron Mountain Site Validation

Organisations that contract Iron Mountain Site Validation functionality follow different steps when placing file-only and vault collection service orders.

1. Select **Records Management | Collections, Add Records | Collection List (Add Records)**. The Collection List screen opens.
2. Select the customer. Selecting the customer activates the Collections basket.

> 📄 **NOTE:** Changing the customer at any time during the collection order process will remove items that you have added to your basket and clear entries on the Collection List screen.

3. Click on the **Collections** basket button. The Collections Basket Items screen opens. The items in your basket are listed, grouped by item type.
4. **Enter invoicing information and instructions.**

   The invoicing fields that you will need to complete vary based on your company's records management hierarchy and service levels.

   - If applicable, select the Invoice to Division and/or Invoice to Department that will incur the cost of this order.
   - Instructions associated with the invoicing division or invoicing department default to the Instructions field from SafeKeeperPLUS™. Use the Item Instructions field to enter instructions that apply to individual line items or to a vault pickup service request, rather than to the division or department.
   - If this customer requires purchase orders, enter the purchase order number to which this order will be applied. Use the purchase order lookup to find a list of active purchase orders. Please see Using Purchase Orders for additional information.
   - If this customer uses chargeback codes to apply external charges, enter the applicable code. Use the Apply to All button to enter the same chargeback code for each item on the pickup order.

5. To add files to the order, type the number of **New** and Refile files to be picked up in the Individual File section on the screen. Specify any special instructions that apply to those files.

6. To add a vault service collection to this order, tick the **Vault Collection Service** box located at the bottom of the screen.

7. Click **Next>** to move to the Collection Order Completion step in the Collection Order wizard. Please see **Collection Order Wizard Step 3: Collection Order Completion. (Section 3.10.4)**

> **NOTE:** Items remain in your basket from one session to another until you complete an order or manually remove the item.

3.11 Bulk Data Upload

3.11.1 About Bulk Upload

Bulk Upload automates the process of creating large quantities of records. Use Bulk Upload to quickly upload a formatted .csv file and automatically create up to 200 records, rather than entering the data manually, one record at a time.

3.11.2 Bulk Upload Templates

Iron Mountain Connect Records Management provides data entry templates to ensure that you include the required data in the proper format when performing a bulk upload.

1. Select **Records Management | Bulk Upload**. The Bulk Upload Status screen displays.
2. Download a template each time you prepare a bulk upload:
   - If you separate columns of data with a comma (,), select a template from the **Templates** dropdown menu
   - If you separate columns of data with a semicolon (;), select a template from the **InternationalTemplates** dropdown menu

The columns on the templates correspond to the data entry fields on a box or file record. You are able to hide columns on the template; however, deleting a column will result in an upload error.

Click on the column headings to display data entry tips such as field length and accepted format or characters.

3.11.3 Formatting Bulk Upload Data

Following the guidelines below when formatting data for bulk upload will result in fewer errors during upload and will minimise upload time:

- Separate data with one of the accepted delimiters. Iron Mountain suggests using:
    - Comma (,)
    - Semicolon (;)

- Download and use the Iron Mountain Connect Records Management templates for data entry.
    - If you separate columns of data with a comma (,) select from the **Templates** dropdown menu
    - If you separate columns of data with a semicolon (;) select from the **InternationalTemplates** dropdown menu

- Enter dates in the default format for your region, or in International Organization for Standardization (ISO) date format:
    - MM/DD/YYYY American date format
    - DD/MM/YYYY European date format
    - YYYY-MM-DD ISO date format
- Include all fields that are required by Iron Mountain and by your system administrator.

- Click on the column headings in the templates to display data entry tips such as field length and accepted format or characters.

Accepted Data Separators (Delimiters)

Iron Mountain Connect Records Management accepts the following delimiters to separate columns of data:

- Comma (,)
- Semicolon (;)
- Colon (:)
- Pipe (|)

Data entry templatesdesigned to work with comma- and semicolon-separated data are included in this application. Iron Mountain suggests using these delimiters when preparing data.

Manual formatting is required to use the colon and pipe delimiters. Iron Mountain does not provide data formatting templates that support these delimiters.

3.11.4 Bulk Uploading Boxes

1. Select **Records Management | Bulk Upload**. The Bulk Upload Status screen is displayed.
2. Download a data entry template:
    - If you separate columns of data with a comma (,), select Bulk **Box Creation Template.csv** from the **Templates** dropdown

- If you separate columns of data with a semicolon (;), select **Bulk Box Creation Template (Intl. semicolon).csv** from the **InternationalTemplates** ![icon] dropdown

3. Open the template. The columns on the template correspond to the data entry fields on the box record. If a field is required by Iron Mountain or by your system administrator, you will need to include it in your bulk upload. Leaving it blank will generate an error and prevent the entire file from uploading.

> 📋 **NOTE:** Your required fields display with a red asterisk (*) in the Box Details screen.

4. Copy and paste or enter data for up to 200 boxes. Follow Iron Mountain's **formatting guidelines (Section 3.11.3)**to minimise errors during upload and reduce the amount of time required for the upload process.
5. If you enter dates in International Organization for Standardization (ISO) format (YYYY-MM-DD), enable your file to retain that formatting:
    a. Press **Ctrl-A** to select all of the rows of data.
    b. Select the **Home** tab.
    c. Change the format that applies to number cells from **General** to **Text**.
    d. Repeat this step each time you re-open the .csv file.

> 📋 **NOTE:** Each time you open the file, you must repeat the steps to enable the ISO date format.

6. Save your file in .csv format with a unique name. If the file fails to upload, you will be able to correct and re-upload this .csv file.
7. Select **Bulk Upload | Bulk Upload Boxes** to begin the process of uploading the .csv file that you have formatted. The Bulk Upload Boxes screen opens to the **Select File** step in the wizard.
8. Click **Browse**. Locate and open the .csv file that you formatted.
9. Select the**Date Format**that you used when entering dates in this .csv file:
    - MM/DD/YYYY American date format
    - DD/MM/YYYY European date format
    - YYYY-MM-DD ISO date format

10. Click the**Box Typelookup** ![icon] . The Choose Box Type screen opens. The most commonly used Iron Mountain boxes are displayed.
    a. If necessary, select a different **country**.
    b. Click to highlight and select the type of box.

> 📋 **NOTE:** If you are not using an Iron Mountain-supplied box, select a box that is equal to or greater in dimension than the box you will be using.

11. Click**Upload>**. Iron Mountain Connect Records Management begins processing the file and a confirmation email is sent to the email address in your user profile:
    - ✅ **Processing Successful::** Once processing has been successfully completed, a unique ID is assigned and the .csv file is queued for bulk upload. There may be a delay before Iron Mountain Connect Records Management begins bulk uploading the boxes in your .csv file.
    - 🛑 **Processing Failed::** A failure message is displayed immediately and the file is not uploaded. Correct the ORIGINAL .csv file, then repeat this process from step 5 with the corrected file. Refer to the*File Processing*

Errors section in **Correcting Bulk Upload Errors (Section 3.11.7)**.

12. If processing was successful, select **Bulk Upload | Bulk Upload Status** to check the upload status:
    - ✔ **Upload Successful**: Mountain Connect Records Management successfully created the box records from the .csv file. Click the green link to the right of the upload ID to open the collection list containing the boxes.
    - ⚠ **Upload Failed:**: Click the red link to the right of the upload ID to view the system-generated error file containing data upload error messages. Correct the ORIGINAL .csv file, then repeat this process from step 5 with the corrected file. Refer to the *Data Upload Errors* section in **Correcting Bulk Upload Errors (Section 3.11.7)**.

3.11.5 Bulk Uploading Files

1. Select **Records Management | Bulk Upload**. The Bulk Upload Status screen is displayed.
2. Download a data entry template:
    - If you separate columns of data with a comma (,), select Bulk **File Creation Template.csv** from the **Templates** ▤ dropdown
    - If you separate columns of data with a semicolon (;), select **Bulk File Creation Template (Intl. semicolon).csv** from the **InternationalTemplates** ▤ dropdown
3. Open the template. The columns on the template correspond to the data entry fields on the file record. If a field is required by Iron Mountain or by your system administrator, you will need to include it in your bulk upload. Leaving it blank will generate an error and prevent the entire file from uploading.

   📝 **NOTE:** Your required fields will be displayed with a red asterisk (*) in the File Details screen.

4. Copy and paste or enter data for up to 200 files. Follow Iron Mountain's **formatting guidelines (Section 3.11.3)** to minimise errors during upload and reduce the amount of time required for the upload process.
5. If you enter dates in International Organization for Standardization (ISO) format (YYYY-MM-DD), enable your file to retain that formatting:
    a. Press **Ctrl-A** to select all of the rows of data.
    b. Select the **Home** tab.
    c. Change the format that applies to number cells from **General** to **Text**.
    d. Repeat this step each time you re-open the .csv file.

   📝 **NOTE:** Each time you open the file, you must repeat the steps to enable the ISO date format.

6. Save your file in .csv format with a unique name. If the file fails to upload, you will be able to correct and re-upload this .csv file.
7. Select **Bulk Upload | Bulk Upload Files** to begin the process of uploading the .csv file that you formatted. The Bulk Upload Files screen opens to the **Select File** step in the wizard.
8. Click **Browse**. Locate and open the .csv file that you formatted.
9. Select the **Date Format** that you used when entering dates in this .csv file:

- MM/DD/YYYY American date format
- DD/MM/YYYY European date format
- YYYY-MM-DD ISO date format

11. Click **Upload>**. Iron Mountain Connect Records Management begins processing the file and a confirmation email is sent to the email address in your user profile:
    - ✅ **Processing Successful** : Once processing has been successfully completed, a unique ID is assigned and the .csv file is queued for bulk upload. There may be a delay before Iron Mountain Connect Records Management begins bulk uploading your .csv file.
    - 🛑 **Processing Failed** : A failure message is displayed immediately and the file is not uploaded. Correct the ORIGINAL .csv file, then repeat this process from step 5 with the corrected file. Refer to the *File Processing Errors* section in **Correcting Bulk Upload Errors (Section 3.11.7)**.
12. If processing was successful, select **Bulk Upload | Bulk Upload Status** to check the upload status:
    - ✔ **Upload Successful**: Mountain Connect Records Management successfully created the file records from the .csv file. Click the green link to the right of the upload ID to open the pickup list containing the files.
    - ⚠ **Upload Failed**: Click the red link to the right of the upload ID to view the system-generated error file containing data upload error messages. Correct the ORIGINAL .csv file, then repeat this process from step 5 with the corrected file. Refer to the *Data Upload Errors* section in **Correcting Bulk Upload Errors (Section 3.11.7)**.

3.11.6 Checking the Status of a Bulk Upload

The Bulk Upload Status screen provides a real-time snapshot of the processing status of .csv files that have been processed and submitted for upload in the past 60 days.

Status	Action
🕐 UPLOAD IN PROGRESS	Click **Refresh** 🔄 to display the latest status.
✔ DATA UPLOAD SUCCESSFUL	Click the green link to the right of the upload ID to open the collection list containing the boxes from your bulk upload.
⚠ DATA UPLOAD FAILED	Click the red link to the right of the upload ID to view the system-generated data upload error file. Refer to **Correcting Bulk Upload Errors** for information on correcting errors that occur during a bulk upload.

You are also able to click the **Templates** 🖳 link or the **InternationalTemplates** 🖳 link and download data entry templates from the Bulk Upload Status screen.

3.11.7 Correcting Bulk Upload Errors

There are two types of errors that can occur while bulk uploading boxes and/or files:

File Processing Errors 🛑

Caused by a problem with the .csv file. This type of error is indicated by an immediate message on the Bulk Upload Boxes or the Bulk Upload Files screen after you browse to select the .csv file and processing begins. Upload cannot start if there is a file processing error.

1. Correct the ORIGINAL .csv file.
2. Once corrected, repeat the upload process starting with step 5 in **Bulk Uploading Boxes (Section 3.11.4)**or **Bulk Uploading Files (Section 3.11.5)** until you have a successful upload.

Use the following table of examples to help troubleshoot file processing errors:

EXAMPLE FILE PROCESSING ERRORS		
Error Message	**Error Type**	**Solution**
File Exceeds 10 MB Size Limit	.csv File Upload	Divide into smaller files that are under 10 MB each. Limit file to 200 rows
File has invalid column headers	.csv File Upload	The columns included in the .csv file do not match the fields that your system administrator has required or disabled. Contact your system administrator to verify field settings. (Note that required fields are displayed with a red asterisk on the Box Details screen and File Details screen.)
File is empty	.csv File Upload	Enter or cut and paste data.
Incorrect file type	.csv File Upload	Use the data entry templates available from the Bulk Upload Status screen for all data entry Save file as a .csv file.
Invalid date format: [FIELD NAME]	.csv File Upload	The date format that you used during data entry (American: MM/DD/YYYY; European: DD/MM/YYYY; ISO: YYYY-MM-DD) does not match the format that you selected during upload. Select the matching date format. If you use ISO Date format (YYYY-MM-DD), check that the formatting for number cells on the .csv file is set to Text. Refer to

		step 5 in Bulk Uploading Boxes.

Data Upload Errors ⚠️

Caused by a problem with the data contained in the .csv file. This type of error is indicated by a message on the Bulk Upload Status screen after processing finishes and upload begins. Iron Mountain Connect Records Management also generates an error file that lists the data upload errors.

1. From the **Bulk Upload Status** screen, click the red link to the right of the upload ID to view the system-generated error file.
2. Error messages are displayed in the Error Type column on the far left of the file. Use the error messages and suggested solutions below to correct the original bulk upload file.
3. Once corrected, repeat the upload process starting with step 5 in **Bulk Uploading Boxes** or **Bulk Uploading Files**s until you have a successful upload.

Use the following table of examples to help troubleshoot data upload errors:

EXAMPLE DATA UPLOAD ERRORS		
Error Message	**Error Type**	**Solution**
Box [Box number] does not exist or does not belong to customer [customer ID]	Data Upload	Verify box number Enter valid box number that belongs to a customer you have access to or contact your system administrator for access
[FIELD NAME] Exceeds character maximum	Data Upload	Shorten entry
[FIELD NAME] Required field	Data Upload	This field is required by Iron Mountain Connect Records Management or by your system administrator and cannot be blank. Enter data
[FIELD NAME] This box number has already been entered into the Iron Mountain Connect Records Management system	Data Upload	Determine if this is a duplicate entry. Enter a unique box number.
[FIELD NAME] This is not a valid entry; please re-enter	Data Upload	This is a system-validated field that is checked to ensure accuracy Enter qualified data.
Inactive customer	Data Upload	Enter an active customer (that can transact orders)
Inactive division	Data Upload	Enter an active division (that can transact orders)

Inactive department	Data Upload	Enter an active department (that can transact orders)
Inactive record code	Data Upload	Enter an active record code
Invalid customer	Data Upload	Enter a valid customer that your system administrator has granted you access to
Invalid date; From Date must come before To Date	Data Upload	Enter a From Date that precedes the To Date
Invalid division	Data Upload	Enter a valid division to which your system administrator has granted you access.
Invalid department	Data Upload	Enter a valid department to which your system administrator has granted you access
Invalid box number	Data Upload	Enter valid box number that belongs to a customer you have access to or contact your system administrator for access
Invalid record code	Data Upload	Enter valid record code
Permission required	Data Upload	Permission to perform this task has not been granted. Contact your system administrator for assistance.
Select either Destruction Date or Destruction Indicator	Data Upload	Deselect either the Destruction Date or the Destruction Indicator, so that only one of the fields is selected.
User does not have access to the customer	Data Upload	Select a different customer or contact your system administrator for access
User does not have access to the division	Data Upload	Select a different division or contact your system administrator for access
User does not have access to the department	Data Upload	Select a different department or contact your system administrator for access

3.12 Supply Orders

3.12.1 Entering a Supply Order

A supply order is a request to Iron Mountain for storage supplies such as empty boxes, transmittal slips and listing sheets. Iron Mountain transports the supplies to your location. The Supply Order wizard ensures that you have entered the appropriate order information, specified collection details such as priority, courier and order instructions, and have had the opportunity to review the order for accuracy.

1. Select **Records Management | Order Supplies**. The Order Supplies screen opens.
2. Select a Customer. Iron Mountain Connect Records Management populates the search bar and main screen as follows:

a. Information defaults into the address fields on the search bar from the customer's **default address, (Section 3.1.1)** which is set in the Shipping Address List.
b. Available supplies are listed in the main section of the screen. Iron Mountain Connect Records Management performs the following checks to determine which supplies are available for this customer:

- If this customer is associated with a custom supply list, Iron Mountain Connect Records Management applies and uses this list.
- If there is no custom supply list, Iron Mountain Connect Records Management checks the default address to determine with which district it is associated and uses the district supply table maintained in SafeKeeperPLUS. There are different supplies available in different districts.

📋 **NOTE:** Your system administrator **creates and maintains custom supply lists (Section 2.4.3)**.

3. If necessary, change the address to which the supplies will be delivered.
4. For each type of supply required, enter the quantity and click **Add to Basket**. Supply items are sold in bundles. Iron Mountain Connect Records Management calculates the number of items on the order by multiplying the quantity you enter by the number per bundle. For example, standard boxes are sold in bundles of 10. Entering an order for 10 standard boxes will result in a supply order of 100 standard boxes (10 bundles of 10).
5. Next, the Supply Order wizard leads you step-by-step through the order process. Refer to **Supply Order Wizard Step 1: Supply Order Basket Items (Section 3.12.2)**.

📋 **NOTE:** Items remain in your basket from session to session until you complete an order or manually remove the item.

Supply Order Messages

Symbol	Message	Meaning
⚠️	Item out of stock; expect slight delay	This item is on your custom supply list, but is not carried on your district supply list.
🛑	Item not carried at this time	This item is not currently available due to low inventory.

3.12.2 Supply Order Wizard Step 1: Supply Order Basket Items

Review the order, update order information, and add and remove line items as necessary.

1. Click the **Supplies** button . The Supply Order Basket Items. The items in your basket are listed, grouped by item type.
2. Review the items in the basket:

      a. Add and remove the items as necessary:

- To change the amount of an item that you have already added to the order, enter an amount in the Quantity field and click **Update**.
- To add a new type of item to the order, click **Add More Supplies**. You are taken back to the Supply List Entry screen where you can add additional items to the basket.
- To remove an item from the basket, click the **Remove Item** link.
- To remove <u>all</u> items from the basket, click the **Empty Basket** button.

    b.Enter billing information and instructions. The billing fields that you will need to complete vary based on your company's records management hierarchy and   service level:

- If applicable, select the **Invoice to Division** and/or **Invoice to Department** that will incur the cost of this order.
- Instructions associated with the invoicing division or department default from SafeKeeperPLUS. You are able to enter instructions that apply to each specific item on this order.

3. Click **Next>** to move to the Supply Order Details step in the Supply Order wizard. Refer to **Supply Order Wizard Step 2: Supply Order Details (Section 3.12.3)**.

3.12.3 Supply Order Wizard Step 2: Supply Order Details

Review the delivery and shipping information that defaults for the order.

1. After you finish the Supply Items step and click **Next>**, the Supply Order Details screen opens.
2. Review and edit the default shipping and delivery information. The order items are listed at the bottom of the screen grouped by type.

    a. Verify the address on the order. Click **Change Address** to select a different address and contact for the order, or to **create a new address (Section 2.8.10)** that will be used on this order and that will be retained in the centralised address repository for future use.

> 📋 **NOTE:** Changing the delivery address will empty your basket and reset your supply list.

    b. If necessary, change the Delivery Contact.

- Click **Use My Contact Information** to overwrite the default contact with your name and phone number. This information defaults from your user profile.
- Manually type contact information for a different contact.

3. Select a **Shipping Priority (Section 3.12.7)** to set the date and time for the delivery. The shipping priorities available depend on the customer's **service priorities (Section 2.2.11)**, as well as the service level options set in your user profile. To set a date beyond the next working day, select Scheduled, and then type a date in

DD/MM/YYYY format, or click and select a date.

4. Select a **courier**. If you choose to have the order delivered by a third-party courier, you will be required to complete the additional third party fields that display:

   - **courier**: Name of the shipping company that will handle transport
   - **Account**: Account number being billed for the delivery
   - **Priority**: Shipping priority

5. If necessary update the **email addresses** of the contacts who will receive notification when the order is submitted. The primary contact receives all notification, confirmation and cancellation emails. Non-primary email addresses will receive confirmation emails, but will not receive cancellation or delivery confirmation emails.

6. Enter **instructions** that apply to the whole order. If you are using a third-party courier, the third-party information that you are required to enter supersedes these instructions.

7. If there is an internal routing address associated with this order, click the **Add Internal Routing Address** link to open the Shipping Address List screen and select the address for this order. Change the internal delivery contact as necessary.

8. Click **Place Your Order**. Iron Mountain Connect Records Management processes your order. Make sure you keep your browser window open until the application has finished processing and you are taken into the Order Completion step in the Supply Order wizard. Refer to **Supply Order Wizard Step 3: Order Completion (Section 3.12.4)**.

3.12.4 Supply Order Wizard Step 3: Supply Order Completion

Order Completion is the final step in the Supply Order wizard. Iron Mountain Connect Records Management displays a success message that confirms that your order has been successfully submitted and assigns a status of *Submitted for Processing*. You are also able to review and cancel the order from this step in the wizard if necessary.

A confirmation is emailed to each address that you entered in the Email Confirmation section in the Order Details step of the wizard. The primary contact will receive all notification, confirmation and cancellation emails.

Once you have completed the order, you are able to:

- **Continue Processing Supply Orders:** Click **<Start a New Supply Order** to return to the Supply List screen and begin a new supply order.
- **Review the Order**:

  1. Click the **Order Number** link or click the **View Order** button. The Order screen opens with the Order Information tab displayed.
  2. Click the Order History tab to view transactions associated with the order.
  3. When you have finished reviewing the order, click **Close**.

- **Cancel an Order (Section 3.13.1)**

> 📝 **NOTE:** Should you receive a system error while placing an order, your order items will remain in the basket. Return

to Iron Mountain Connect Records Management and complete processing at a later time.

3.12.5 Users: Creating a Shipping Address While Entering an Order

Iron Mountain Connect Records Management enables you to create a new shipping address from within any of the order wizards. Seamlessly apply this new address to the order you are processing and save it in the centralised address repository for future use.

1. From within the Details step of any of the order wizards, click **Change Address.** The Address wizard opens.
2. Click the **Add Address** button.

📄 **NOTE:** If you are creating a shipping address from within a retrieval order, select the customer this address applies to from the **Choose Customer** drop-down menu. You will not need to select a customer when creating a shipping address from within a collection or supply order; you selected the customer when you began entering the collection or supply order.

3. **Enter the shipping address details. (Section 2.8.4)**
4. **Select the users (Section 2.8.5)** that will be able to use this shipping address when placing an order.
5. Click **Confirm** to move to the final step in the Address wizard and review the information for this address on a single screen.
   a. To change the users assigned to this address, click **<Choose Users**. You are returned to the previous screen. Make changes as necessary.
   b. To change the address, return to the Choose Users step and click **<Address Details** to return to the Address Details screen. Make changes as necessary.
6. When you have reviewed the address, click **Use This Address**. The address is created and you are returned to the Details step in the order wizard. The address that you created defaults onto the order and is saved in the centralised address repository for future use.

To review the address, refer to **Viewing a Shipping Address (Section 2.8.6)**. To update the address, refer to **Editing a Shipping Address (Section 2.8.8)**.

3.12.6 Using Purchase Orders

⚠️ Purchase Order functionality is country-specific and may not be available in your region.

Customers that use purchase order numbers to assign and track expenses are able to apply purchase order numbers from SafeKeeperPLUS to collections, retrieval and supply orders in Iron Mountain Connect Records Management. After the orders are processed, the purchase order is automatically decremented and the status is adjusted.

To be applied, a purchase order number must have an **active** status:

- Purchase order number has reached its start date and has not yet reached its expiry date
- Purchase order number has sufficient funds

Purchase Order Statuses:

- **Active**: Positive balance; current date range (appear on Lookup Purchase Order Number screen)
- **Inactive**: Start date in future (do not appear on Lookup Purchase Order Number screen)
- **Suspended**: Negative balance (do not appear on Lookup Purchase Order Number screen)
- **Closed**: Expired; end date is passed (do not appear on Lookup Purchase Order Number screen)

Applying a Purchase Order Number

Apply a purchase order number while entering the billing information during the first step in any of the order wizards (Step 1: Basket Items). The billing fields that you will need to complete vary based on your company's records management hierarchy and **service levels (Section 2.2.10)**:

1. If applicable, select the **Invoice to Division** and/or **Invoice to Department** that will incur the cost of this order. Any instructions associated with the Billing Department default from SafeKeeperPLUS and are displayed below this field.
2. Enter the purchase order number manually or use the purchase order number lookup described below to select from available purchase order numbers.

Looking Up a Purchase Order Number

1. Click the Purchase Order Lookup ☰ located to the right of the PO Number field. The Lookup Purchase Order Number screen opens. Active purchase order numbers (purchase orders that have reached their start date, have not yet reached their expiry date and have sufficient funds) are displayed based on the customer's records management hierarchy and billing requirements.
2. Click on a row to select and apply a purchase order number. The purchase order number is applied to all line items the customer has placed on the order.

> 📑 **NOTE:** Purchase orders can be created and assigned to an enterprise. If a purchase order is assigned to a company that is part of an enterprise, the Enterprise column is populated.

3.12.7 Shipping Priorities

Your service level contract determines the priorities available. The priority setting determines when an order will be picked up or delivered. These are the priorities you can select for your orders:

Priority	Order By	Delivered By
Next Day	3:00 p.m.	5:00 p.m. the next working day

Half Day	10:00 a.m.	5:00 p.m. the same working day
	3:00 p.m.	12:00 p.m. (noon) the next business day
Rush	Before 3:00 p.m.	Within three (3) hours the same working day
	After 3:00 p.m.	11:00 a.m. the next working day
Scheduled	Any time	The scheduled date and time (greater than the next working day)

3.12.8 Courier Options

Courier options specify who will transport an order (for example, Iron Mountain or an outside courier). Courier options vary according to the customer location and delivery address.

Select from the following options:

- **Iron Mountain**: Delivered by an Iron Mountain driver (default value)
- **Customer Dropoff/Collection**: The client will deliver the order to or pick up the order from an Iron Mountain storage facility
- **Third Party**: Delivery by a third-party courier service

If the customer location or delivery address is outside of the service area, Iron Mountain Connect Records Management will automatically utilise a third party courier. A message indicating that third party courier service will be used is included on the order confirmation and is displayed below each of these line items in the Order Details (Step 2) and Order Completion (Step 3) steps in the order wizards.

3.13 Tracking Orders

Using **Track Orders**, you can find your orders and view their statuses, details and histories. You can search for orders by customer, order number, request date and order type.

> **NOTE:** You are able to view orders for customers to whom your system administrator has granted you access in your user profile.

1. Select **Records Management | Track Orders.** The Order List screen opens.
2. Enter search criteria in one or more fields on the Left-side Search Bar to create a search query. Use as many or as few of the search fields as necessary:

   - To search by Order Number, type a number.
   - To search by **Customer**, select a customer from the drop-down list.

- To search by Request Date, type a date in DD/MM/YYYY format or select a past date range.
- To search by **Order Type**, select from the drop-down list of **order types (Section 3.13.2)** included in this selection.
- To search by the person who placed the order, select a user from the **Requested By** drop-down list.

3. Click **Search** or **>** to activate your search. Your search results are displayed on screen. By default, results are listed by their order number and date requested.
4. **Sort your search results (Section 3.1.3)** and **add or remove columns (Section 3.1.3)**.
5. To review the order, click the Order Number. The Order screen opens and you are able to move between the Order Information and Order History tab screens:

NOTE: You are able to view details for order items that you have access to; items you do not have access to are restricted from view.

- **Order Information**: Detailed information about an order, including the delivery/collection address, priority, contact information and order instructions. The *Line Item* section of this screen lists information specific to each order item.
- **Order History** : A list of the transactions associated with the order.

6. When you have finished reviewing the order, click **Close** to return to the Order List screen.

NOTE: If an order has been submitted but has not been yet processed by Iron Mountain (status of *Submitted for Processing*), you can also **cancel the order (Section 3.13.1).**

3.13.1 Cancelling Orders

You are able to cancel orders that have been submitted to Iron Mountain but have not yet been processed (orders with a status of *Submitted for Processing*).

You CANNOT cancel orders that have been processed, are on hold or have any status other than Submitted for Processing.

You are able to cancel an order from four selections within Iron Mountain Connect Records Management:

- The **Completion** step in the Retrieval Order, Supply Order and Collection Order wizards
- **Records Management | Track Orders**

NOTE: Cancelled orders are permanently removed from Iron Mountain Connect Records Management and cannot be restored.

1. From within **Records Management | Track Orders**, click the Order Number link. From the Completion step in any of

the order wizards, click the **Order Number** link or the **View Order** button. The Order screen opens with the Order Information tab displayed.

2. Click **Cancel** from either the Order Information or Order History tab screen.

3. Iron Mountain Connect Records Management prompts you to confirm the cancellation. Click **Cancel**.

4. The order is cancelled. You are returned to the Order List screen. A banner message at the top of the screen indicates that the order was successfully deleted and the status of the order is set to *Cancelled*.

If the Order Status is...	Then click...
Submitted for processing	View to display its order details or Cancel Order to cancel it.
Processed	Order History to view the transactions for the order.
Any other value	View to display the order details.

3.13.2 Order Types

Order Type	Description
All	All order types.
Retrieval	**Retrieve items** from storage at Iron Mountain and deliver them to a customer.
Collection	**Pick up items** from a customer and deliver them to an Iron Mountain storage facility.
Supplies	**Supplies**, such as empty boxes and files, are delivered by Iron Mountain.
Permanent Withdrawal	Permanently remove items from storage at Iron Mountain and return them to a customer.
Destruction	Destroy specified items that are stored at Iron Mountain.
Enquiry	Retrieve items from storage and inspect contents at Iron Mountain.
Image on Demand	Retrieve images from storage at Iron Mountain and deliver them to a customer.
Media Destruction	Scheduled destruction of tapes, cds and other electronic media.
X-Ray on Demand	Retrieve x-rays from storage at Iron Mountain and deliver them to a customer.

3.13.3 Order Statuses

Order Status	Order Type	Description
Submitted for Processing	All	Iron Mountain has electronically received your order request.
Released	All	Iron Mountain is routing your order to the appropriate internal department.
Partially Released	Retrieval, Permanent Withdrawal, Destruction Orders	Iron Mountain is routing individual items from your order to the appropriate internal department. Not all order items have been released.
In Process	Collection, Retrieval, Permanent Withdrawal	Iron Mountain is processing your order.
Processing Completed	All	Iron Mountain has finished processing your order and is in the process of arranging the proper transport.
In Transit	Retrieval, Permanent Withdrawal	The order is on the lorry to your location for delivery.
In Transit to Customer	Pickup	The driver is on the way to collect your order.
In Transit to Iron Mountain	Pickup	The driver has collected your order and it is on the lorry to an Iron Mountain facility.
Completed	Collection, Retrieval, Permanent Withdrawal	The driver has delivered your retrieval order/permanent withdrawal or returned to Iron Mountain with your collection order.
On Hold	All	The order has been placed on hold and is not being processed at your request or for credit reasons.
Cancelled	All	Your order has been cancelled and will not be processed.

3.13.4 Processed Orders

An order is processed (order status is set to *Processing Completed*) when Iron Mountain generates a confirmation after the Completion step in any of the Order wizards.

- For retrieval orders, confirmation means that the stored items have been removed from their shelves and are ready for shipping.
- For collection orders, confirmation occurs when Iron Mountain receives the order from the customer.

Iron Mountain archives all processed orders after six months without an associated transaction.

3.13.5 Order History

The Order History is a chronological list of the transactions related to an order, as well as the users who requested them. The following transactions appear in the Order History:

Transaction	Codes*	Description
Callback completed	CBK	Iron Mountain initiated a callback to the customer.
Cancelled	CLD	The order was cancelled.
Processing completed	SHP	The order was processed by Iron Mountain.
Requested: not found	NIF, RSH	An item in the order was not found in storage at Iron Mountain.
Submitted for processing	ELG	The order was posted (submitted) to Iron Mountain Connect Records Management.
Updated	MNT	The order was modified after being posted, and then re-posted.
*Order history codes, used in SafeKeeperPLUS, are listed here to show their relationship to the order statuses in Iron Mountain Connect Records Management.		

4 Glossary

A

Activate
Change a user's profile to immediately restore access to Iron Mountain Connect Records Management to a user who was previously inactive or terminated.

Active
A customer, division or department that is currently able to use Iron Mountain Connect Records Management to transact orders and manage records.

Administrative User
See *Client Content Administrator* and *Client User Administrator*.

Advanced Search
The Iron Mountain Connect Records Management selection that provides users with enhanced search functionality not available in Basic Search. Functionality includes multi-select organisational filters and search criteria.

Alpha From

Alphanumeric data entry field on boxes and files. Alpha From is the leading value when you create an advanced search on an Alpha Text Range.

You can enter alphanumeric data in the Alpha From field, however, when Iron Mountain Connect Records Management searches Alpha From, it only searches alphabetical groupings; it does not search numeric characters or dates.

Alpha Text Range
An advanced search field that searches the Alpha From and Alpha To fields on a record and returns results within that range. Alpha Text Range searches alphabetical groupings; it does not search numeric characters or dates.

Alpha To

Alphanumeric data entry field on boxes and files. Alpha To is the ending value when you create an advanced search on an Alpha Text Range.

You can enter alphanumeric data in the Alpha To field, however, when Iron Mountain Connect Records Management searches Alpha To, it only searches alphabetical groupings; it does not search numeric characters or dates.

Asset
Boxes and files stored at Iron Mountain. Also referred to as items and records.

B

Basic Search
The Iron Mountain Connect Records Management selection that enables users to locate records stored at Iron Mountain. Also referred to as Search.

Basket
An e-commerce term for the holding area used for storing records or supplies before a user places an order. Also referred to as a shopping basket.

Box
A three-dimensional carton used to store files, x-rays and other items.

Box Record
A set of data fields that describe the customer, contents, transactions, and other information pertaining to a box.

Box Template
See *Custom Box Template*.

Bulk Upload
Automated process for creating and editing a large quantity of records from data entered in a .csv file. Bulk upload reduces manual input and data entry time.

C

Carton
See *Box*.

Chargeback Code
Customer-defined code used to track and allocate shipping and other charges to external customers, contacts and projects.

Checkout
Retrieval method a user selects to temporarily retrieve or permanently withdraw items from storage at Iron Mountain.

Client Content Administrator (CCA)

Administrative user who has the ability to upload company content and branding to the Iron Mountain Connect homepage.

A CCA can also be a Client User Administrator (CUA).

Client User Administrator (CUA)
Administrative user who manages user profiles and grants organisational access and permissions to users within a company. A CUA automatically has complete organisational access and full permissions throughout Iron Mountain Connect Records Management. A CUA can also be a Client Content Administrator if that access has been set; a CUA cannot be a standard user.

Collection Address
An address specifying the customer, location, and contact from which items will be transported to an Iron

Mountain storage facility.

Collection Order
A request for one or more items to be sent to an Iron Mountain storage facility.

Company
Iron Mountain Connect Records Management term for the top, overarching level in a records management hierarchy. Customer, division and department levels are created and organised within a company.

Correspondence Address
An address to which company information from Iron Mountain is mailed.

Courier Option
A setting that specifies who will transport an order (for example, Iron Mountain or an outside company).

Criteria
A custom query that you build with fields, rules, operators and values, then attach to an advanced search. Each advanced search can have up to five criteria attached.

Custom Box Template
Custom settings that drive data entry and control which fields are required, enabled and disabled during box creation. Also referred to as a *Box Template*.

Custom Field Label
A label that replaces the default (system-assigned) field label so that it matches the purpose your organisation assigns to the field. Custom field labels are added and managed by the system administrator. See also *Default Field Label*.

Custom File Template
Custom settings that drive data entry and control which fields are required, enabled and disabled during file creation. File templates are assigned at the customer, division and/or department levels. Also referred to as a *File Template.*

Custom Supply List
A list of supplies available to a specific customer so that users creating supply orders are limited to only those supplies on the list. Custom supply lists are created and maintained by system administrators; they provide control over the supplies available to users. See also *Default Supply List*.

Customer
A company or organisation that stores boxes, files, or other items at Iron Mountain.

Customer ID
An alphanumeric identifier for a customer provided by Iron Mountain.

Customer Name
The name of an Iron Mountain customer.

Customer Record Code
A record code that was created for a specific customer and is available to users who have access to that specific customer and to departments within that customer. In order to apply a customer record code, the asset must be assigned to that specific customer.

D

Data History
A chronological list of the data changes made to a stored box or file.

Data Separator
A character used to define a boundary or separate data in a list. For example, Iron Mountain Connect Records Management recognizes comma, semicolon, colon and pipe to separate data in a bulk upload file. Also referred to as a *Delimiter*.

Default Field Label
The system-assigned field label. See also *Custom Field Label*.

Default Supply List
A list that includes <u>all</u> supplies available from within Iron Mountain Connect Records Management. It is created and maintained by Iron Mountain, and can be used by multiple customers at one time. The supplies associated with this list do not change. See also *Custom Supply List*.

Delimiter
A character used to separate data or define a boundary in a list. For example, Iron Mountain Connect Records Management recognizes comma, semicolon, colon and pipe to separate data in a bulk upload file. Also referred to as a *Data Separator*.

Delivery Address
An address to which items or supplies will be sent from storage at Iron Mountain. See also *Shipping Address*.

Delivery Method
The manner in which boxes, files, and other items are transported to and from storage.

Department
Subset of a division that is used to organise and classify records stored at Iron Mountain. See also *Division*.

Department Record Code
A record code that was created for a specific department within a customer and is only available to users who have access to that department.   In order to apply a department record code, an asset must be assigned to that specific department.

Destruction Eligibility Date

Manually-entered date when a stored record is eligible to be destroyed. Your organisation's internal retention policies and account setup determine how this field functions.

Note that records are not automatically destroyed when this date passes; an additional destruction request is required before any record is destroyed.

Destruction Eligibility Period
Length of time a box will be stored before it is eligible to be destroyed: Indefinite, Permanent, Undefined or Calculated. Your organisation's internal retention policies and account setup determine whether the

information in this field defaults from the record code, the Destruction Indicator or the Destruction Date.

Destruction Indicator
Manual-selection field that indicates the length of time a box will be stored before it is eligible to be destroyed: Indefinite, Permanent or Undefined. Your organisation's internal retention policies and account setup determine how this field functions.

Destruction Order
A request that a stored item be destroyed by Iron Mountain on or after a specified date.

Disabled Field

Field that the system administrator removes from the application so that it is not available to users for data entry during box and file creation. If a field is disabled after the box or file is received at Iron Mountain, users will be able to view the field, however, they will not be able to add to or modify it. See also enabled field and required field.

Division
Subset of a customer that is used to organise and classify records stored at Iron Mountain.   A division contains one or more departments.

E

Enabled Field
Field that the system administrator makes available to users for data entry during box and file creation. Users are not required to enter data in enabled fields. See also disabled field and required field.

Enterprise
Grouping of companies, similar to a conglomerate that is used for reporting purposes. Enterprises are created and managed in SafeKeeperPLUS.

Enterprise Record Code
A record code that is available to all levels (customer, division and department) within a company.   Also referred to as a Reporting Customer Record Code or Nomenclature Record Code.

F

File
A record that is stored in a box and may or may not have a unique file record associated.

File Record
A set of data fields that describe the customer, contents, transactions, and other information pertaining to a file.

File Sequence Number
A number that specifies the position of a file in a box (for example, "1" for the first file).

File Template

See *File Template.*

Filter
Column-level setting that is applied to restrict search results.

From Date
The beginning of a customer-defined date range in a record.

H

Hold Code
A customer-defined code that overrides the retention schedule for a record, postponing the destruction of a record until further review.

I

Image on Demand (IOD)
An order to retrieve an image file from storage at Iron Mountain and electronically deliver a copy to a customer.

Image on Demand (IOD) Line Item

A request to scan an individual document that is stored within a file. One or more IOD line items make up an IOD request.

Image on Demand (IOD) Request

A request to image document(s) that are stored within a file. An IOD request is made up of a one or more IOD line items.

Inactive Customer
A customer that is able to use Iron Mountain Connect Records Management to view inventory and research records, but cannot transact orders.

Inactive Department

A department in which customers cannot add new records, however, they are able to view inventory and place retrieval and collections orders for existing records.

Inactive Organisation
An organisation in Iron Mountain Connect Records Management that can view inventory and research and retrieve records, but cannot transact orders.

Internal Routing Address
Address that specifies where and to whom an order item should be forwarded after collections or delivery.

Invoice Address
The customer, division or department location to which Iron Mountain sends invoices for services rendered.

Invoice Number
An alphanumeric identifier assigned by Iron Mountain to a customer invoice.

IOD
See *Image on Demand*.

Iron Mountain Connect
The secure gateway that authenticates all users and provides access into multiple, related Iron Mountain software applications. Also referred to as IMC, IM Connect portal and portal.

Iron Mountain Connect Records Management
Iron Mountain's secure records management system, designed to provide fast, easy online access to records and information stored at Iron Mountain. Iron Mountain Connect Records Management system replaces Record Centre.

Iron Mountain Default Box Template
System-assigned Iron Mountain settings that drive data entry for customers not using a custom box template. The default settings determine a customer's required and enabled fields during box creation. The Iron Mountain default box template cannot be updated or removed.

Iron Mountain Default File Template
System-assigned Iron Mountain settings that drive data entry for customers not using a custom file template. The default settings determine a customer's required, enabled and disabled fields during file creation. The default file template cannot be updated or removed.

Item
A line item on an order. Also referred to as an asset.

K

Key Identifier

A field used to track and identify records. Users are required to enter the Key Identifier when creating boxes and files.

The Key Identifier is defined on the box or file template. If the Iron Mountain default box or file template is used, the Key Identifier defaults to Customer Box Number for boxes or File Description 1 for files. If a custom template is used, your system administrator is able to select the field that will be used as your Key Identifier.

Key Identifier displays on the Box and File Details screens, the Item and Details steps of the retrieval order basket, on order confirmation emails and on the Order Info tab screen in the Track Orders selection.

L

Lock
A command to retain the value of a data field for use in subsequent records, much like a template.

Long Description

An extended description of the contents of a box.

M

Master Department
A non-validated department automatically created for all customers by SafeKeeperPLUS.

Master Division
 A non-validated division automatically created for all customers by SafeKeeperPLUS.

O

Offsite Shredding
A destruction process in which items are shredded at an Iron Mountain facility.

Onsite Shredding
A destruction process in which items are shredded in an Iron Mountain mobile shredding unit at a customer location, so the customer can witness their destruction.

Open Shelf
System for storing files not contained in boxes at Iron Mountain.

Open Shelf File
File stored on an open shelf at Iron Mountain rather than inside a box.

Operator
In an advanced search, an operator joins two sets of search criteria. The advanced search operators are AND, OR and NOT.

Order History
A chronological list of the transactions related to an order, as well as the Iron Mountain Connect Records Management users who requested them.

Order Line
A line on an order specifying the type, quantity, and other instructions related to a box, file, or other record.

Order Number
An order number uniquely identifies each service request pertinent to a record. Order numbers are generated by Iron Mountain Connect Records Management.

Order Status
The current disposition of an order (for example, Processed or Cancelled).

Order Type
A type of request for service from Iron Mountain. Examples of order types include collection, retrieval, supply, Image on Demand (IOD) and permanent withdrawal orders.

Organisation
General term used to refer to a company and the levels that make up the company's records management hierarchy,

including the customer, division and department levels.

Organisation Group
Conceptual group of customers, divisions and departments that simplifies the process of managing users. Client user administrators (CUA) and organisation group administrators (OGA) are able to manage and add users to organisation groups.

Organisation Group Administrator (OGA)
System administrator who manages the standard users in an organisation group. An OGA has limited abilities and is only able to grant access to the organisation groups that he or she has access to, and is only able to grant user permissions that he or she has access to.

Organisational Access
Setting that provides user access to the customers, divisions and departments within an organisation.

P

Packing Slip
A standard form listing the information (for example, customer name and address, items shipped, and order type) needed to ship a confirmed order.

Permanent Withdrawal Order
A request to permanently remove an item from storage at Iron Mountain.

Permission
A user profile setting that enables users to perform specific tasks and workflows in Iron Mountain Connect Records Management. Permissions can vary according to users' organisational roles.

Portal
The secure gateway that authenticates all users and provides access into multiple, related Iron Mountain software applications. Also referred to as Iron Mountain Connect, IMConnect and IMC.

Priority
A service level that specifies when an order will be picked up or delivered (for example, Next Day or Rush).

Purchase Order Number
A reference number for the procurement of goods or services from an outside vendor or supplier, usually required for the payment of those goods or services.

R

Receipt Date
The date an item is received at an Iron Mountain facility and entered into SafeKeeperPLUS.

Record
The set of metadata that identifies a box or file stored at Iron Mountain. Also referred to as an asset.

Record Code

A code that can be used to calculate the length of time that a record is retained. Record codes are set at the enterprise, customer or department levels.

Record Status
A summary of the current disposition of a record (for example, At Iron Mountain or Destroyed).

Record Type
A general category of records in Iron Mountain Connect Records Management (for example, box records or file records).

Refile
To return a previously retrieved item to storage at Iron Mountain.

Request Date
The date when an order was originally submitted to Iron Mountain.

Required Field
A data field that must have an entry before a new record can be added to Iron Mountain Connect Records Management. System administrators set the required fields when they create box and file templates.

Retention
The length of time that a record is scheduled to be stored at Iron Mountain based on state and federal laws and industry regulations.

Retrieval Order
A request for one or more items to be temporarily retrieved from storage at Iron Mountain.

Rule
In an advanced search, a rule is logic that you apply to narrow a search.

S

Search Operators
Special characters that fine-tune the meaning of a search. For example, comma between search words operates as an "or."

Security Questions
Questions and answers that a user sets when he or she logs in for the first time. Used to verify identity should the user ever be locked out of the application.

Service Level
Optional parameters that apply when a customer places a collection, retrieval or supply order. Service levels include requiring a chargeback code and validating orders.

Service Level Options
Group of user permissions set by your Iron Mountain Connect System Administrator to provide access to system functionality. Service Level Options deal with shipping priorities, order tracking and order cancellation.

Service Options
Group of user permissions set by your Iron Mountain Connect System Administrator to provide access to system functionality. Service Options enable/disable access to different types of orders.

Shipping Address
An address to which items or supplies will be sent from storage at Iron Mountain. See also *Delivery Address*.

SKP Barcode
SafeKeeperPLUS Barcode. A bar-coded alphanumeric identifier, typically eight to ten digits long, provided by Iron Mountain for each box and file record. Previously referred to as SKP Box Number or SKP File Number.

SKP File ID
SafeKeeperPLUS File ID. An identifier of a file in a box, consisting of an SKP Barcode plus a File Sequence Number.

Standard File

A data format for file records that has four general description fields suitable for a variety of data.

Standard User
A user with restricted access to selected Iron Mountain Connect Records Management features and customer records.

Status
See *Record Status* or *Order Status*.

Supply List
A list of supplies available to a customer. See *Default Supply List* and *Custom Supply List*.

Supply Order
A request to Iron Mountain for storage supplies such as empty boxes, transmittal slips, and listing sheets.

T

Temporary File
See *Unlisted File*.

Terminate
Change a user's profile to immediately remove the user's access to Iron Mountain Connect Records Management.

To Date
The end of a customer-defined date range in a record.

Track Orders

A search to view the history, status, and other details of one or more orders.

Transaction
An event in the history of a record or order (for example, a box being checked out from Iron Mountain or an

order being cancelled).

Transactional History
A chronological list of the orders and other transactions made to a stored box or file.

U

Unlisted File
File that is not individually listed in the box in which it is stored. Once the file is found, it becomes a listed file. If the file is not found, it remains a temporary file that cannot be viewed online or placed on an order.

Unlisted Open Shelf File
An unlisted file that is stored on a shelf at Iron Mountain, rather than in a box.

User Profile
A set of permissions and access rights that determine which Iron Mountain Connect applications, and which Iron Mountain Connect Records Management features and customer records a user can access.

V

Vault
A fire-rated storage facility for magnetic media that is controlled for temperature and humidity levels.

Vault Collection Service
Iron Mountain service that provides direct transport of tapes between a customer site and a secure Iron Mountain vault by a dedicated Iron Mountain vehicle that does not make any other stops or carry assets belonging to other customers. Customers must specifically contract with Iron Mountain for this service which is requested by entering a collections order.

W

Wildcard
A search operator indicated by an asterisk (*) at the end of a word that can stand for any sequence of characters.

Wizard
Application interface that assists users by directing them through a sequence of steps. Iron Mountain Connect Records Management includes wizards to assist with creating supply lists, box templates, and collection, retrieval and supply orders.

X

XOD
See *X-ray on Demand.*

X-ray on Demand (XOD)

An order to retrieve an x-ray from storage at Iron Mountain, scan it and electronically deliver a copy to the customer via PACS.

X-ray on Demand (XOD) Line Item

A request to scan an individual x-ray study that is stored within a file. One or more XOD line items make up an XOD request.

X-ray on Demand (XOD) Request

A request to image an x-ray study that is stored within a file. An XOD request is made up of a one or more XOD line items.

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