

RECORDS MANAGEMENT PORTAL

# QUICK ORDER USER GUIDE



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## 1.0 RECORDS MANAGEMENT PORTAL

### 1.1 Introduction

Iron Mountain's Records Management Portal is a 24/7 web based management system which offers you everything you need to manage your records.

As an Iron Mountain customer, you will have the opportunity to use the Records Management Portal to:

- Place Orders
- Manage Inventory
- View Detailed Reports
- Order Supplies
- Manage internal user access

The Portal can also be set up to 'mirror' your organisation's processes. For example, your identifiers can be used to capture data on items allowing an easy search of inventory to find critical information (see sections on add manage in.

The Portal can also be used to organise your inventory by department, business group, and cost centre.

The benefits of using the Portal include:

- **Visibility and Accessibility:** You can view your items online 24 hours a day, seven days a week.
- **Decision Support:** The Portal can be used as a management support tool. It allows you to determine factors such as retrieval frequencies, usage patterns, destruction dates, appropriate service levels and user access levels.
- **Process Efficiency:** Users can save preferences such as default accounts, field names, commonly used addresses and search options.
- **Context Sensitive Help:** Every screen includes a context-sensitive online help button.
- **Customised Features:** Which include customisable user setup, shopping cart, support for unregistered items, order approval work flow and document level inventory.

# RECORDS MANAGEMENT PORTAL USER GUIDE



## 1.2 Getting Started

To get started, complete the Records Management Online Access form located on the Iron Mountain support Page <https://www.ironmtn.com.au/support> for AU customers or <https://www.ironmountain.co.nz/support> for NZ customers.

This form is used to add, edit or delete users. All requests should to be submitted via email to our Iron Mountain Service Delivery Team.

**Records Management - Online Access Form**

Please complete ALL steps below and email the completed form to: Please select

**STEP 1**

Contact Name:		Contact Phone No.:	
Contact Email Address:		Date:	
Company Name:		State:	

**STEP 2**

Please complete the table below of Users to be Added, Modified or Deactivations, use the coding system below for the field Action:  
 C = Update the email address or Web Security Level    I = Make the User Inactive    R = Remove Account for an Existing User  
 N = New User to be added    A = Add an Account to an existing User    D = Delete the User

First Name	Last Name	Email Address	Iron Mountain Level 1 and Level 2/3 account numbers:	Web User Security Level (please refer to the below table)	Action

Additional Comments

Please use the table below to determine which Web User Security Level Access each user requires, a detailed explanation of each is overleaf:

Web User Security Level	Set personal preferences	Check status of orders	Search Carton/File database	Edit Existing Carton/ File Details	Place order (no approval needed)	Create & Submit Pending Delivery/ Collection Order	Create & Submit Pending Perm out/ Destruction Order	Approve Pending Orders	Add Online - See Own Pending	Add Online - View All Pending	User Self Service - Add / Modify / Disable Users
Level 0	✗	✓	✓	✗	✗	✓	✗	✗	✗	✗	✗
Level 1	✓	✓	✓	✗	✗	✓	✗	✗	✗	✗	✗
Level 2	✓	✓	✓	✓	✗	✓	✗	✗	✓	✗	✗
Level 3	✓	✓	✓	✗	✓	N/A	✓	✗	✗	✗	✗
Level 4	✓	✓	✓	✓	✓	N/A	✓	✗	✓	✗	✗
Level 5	✓	✓	✓	✓	✓	N/A	✓	✓	✗	✗	✗
Level 6	✓	✓	✓	✓	✓	N/A	✓	✓	✓	✓	N/A
Level 9	✓	✓	✓	✓	✓	N/A	✓	✓	✓	✓	✓

Enter your details in full so we can contact you once the users have been updated.

Ensure all fields are completed for each user to enable Iron Mountain to action your request.

If you are adding multiple accounts for a user you can enter these in the additional comments box.

Use the security table to determine the required security level for each users.

Details of what each level provides are listed on the Setup form and below.

### FUNCTIONS AND SECURITY LEVELS

- SET PERSONAL PREFERENCES**  
A user can save individual settings and preferences such as their default account to charge services against, their personal phone number, frequently used addresses (this option is only available if the account security allows and search options).
- CHECK STATUS OF ORDERS**  
A user can review previous services orders placed with Iron Mountain to determine (limited) content and status information.
- SEARCH CARTON / FILE DATABASE**  
A user can search the inventory database of the items managed by Iron Mountain, based on their account security.
- EDIT EXISTING CARTON**  
Item by item, a user can add, modify and delete certain indexes associated with their inventory items (based on their account security) such as Alternate ID, Contents, User Defined Fields (UDF), etc.
- PLACE ORDER**  
User can place service requests with Iron Mountain for collections, deliveries etc.
- CREATE AND SUBMIT**  
Users will be able to create orders, but when they submit the order an approval process is performed where designated customer representatives are required to acknowledge the orders prior to them being placed with Iron Mountain.
- APPROVE PENDING ORDERS**  
Linked to the function described above, users with access to this feature are able to review, amend and Approve service requests submitted by lower security level staff in their organisation.
- RUSS - USER SELF SERVICE**  
Allows users to manage and create users, access rights and activities without the need to contact Iron Mountain.

## 1.3 How to log in to the Records Management Portal

Enter <https://www.ironmtn.com.au> for AU customers or <https://www.ironmountain.co.nz> for NZ customers in your web browser. Move your cursor over “Login” and select “Iron Mountain Records Management Portal” from the drop-down menu.



Enter your login email address and select “Next”.



sign into your secure account below

LOGIN  
imdemo@ironmountain.com|

[Help? Contact Support](#)

**NEXT**

Enter your password and select “Log In”. If you have forgotten your password you can use the “Forgot Password” link to have a new password sent to your email address.

Sign In To Iron Mountain

imdemo@ironmountain.com|

.....

**Log in**

[Forgot Password?](#)

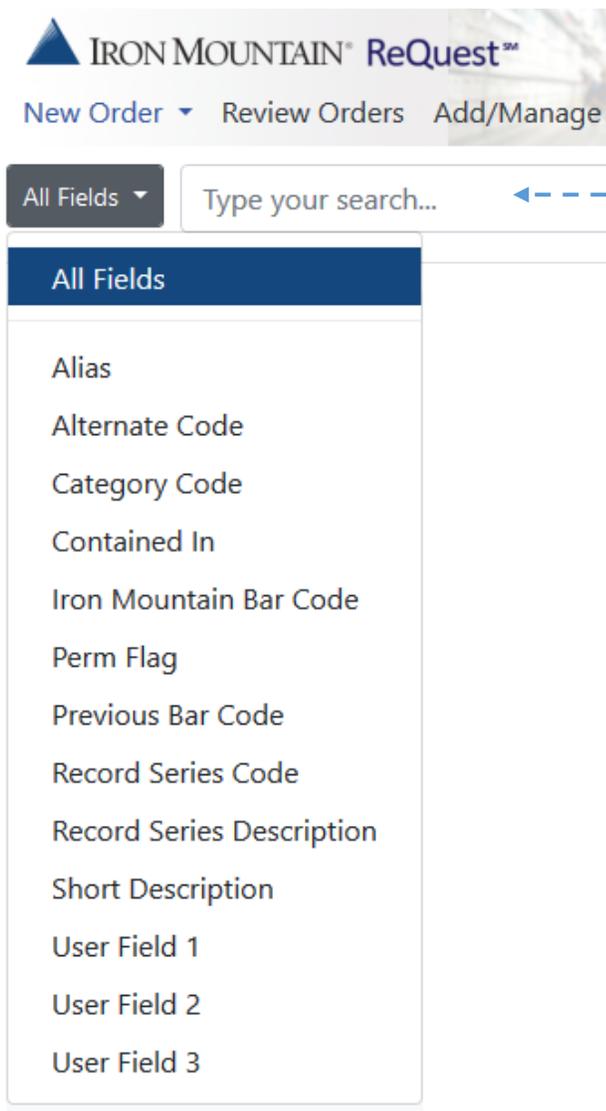
## 2.0 PLACING AN ORDER

### 2.1 Quick Order Experience

Once logged in users have the option to use the “Quick Order Experience” or “Request Web Classic”. The Records Management portal will default to your preferred setting and can be changed at any time in the Preferences screen (covered on page 20). The following information is specific to the Quick Order Experience.

### 2.2 Searching for items

The Quick Order Experience does not require you to change your account for each Work Order. Any search you perform will be run against all of the accounts you have access to.



Type your identifier in to the search bar. This can be an Iron Mountain bar code, alternate code or information you have stored in a short description or user field.

By default the search will be performed against all fields. You can amend this to a specific field by using the grey drop-down box next to the search bar.

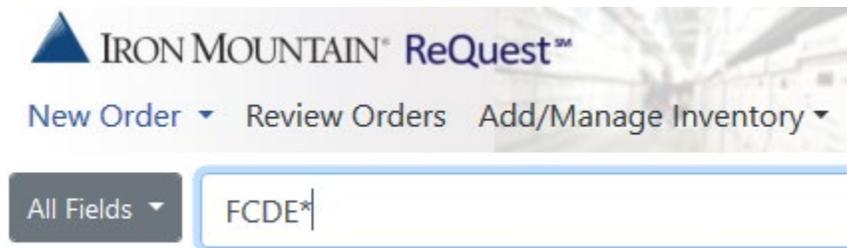
You can refine your search further by using the filters on the left hand side of the main screen.

The image shows a sidebar of filters for the records management portal. The filters are organized into sections: Status, Types, and Data Filters. Each filter has a toggle switch. Callout boxes provide instructions for each section.

- Status:** Includes 'All Status' (off), 'In' (on), 'Pending' (off), 'Out' (on), 'Permut' (on), and 'Destroyed' (on). A callout box explains that selecting a specific status like 'In' refines the search.
- Types:** Includes 'All Types' (off), 'Cartons' (on), and 'Files' (off). A callout box explains that selecting 'Cartons' or 'Files' refines the search to those specific types.
- Data Filters:** Includes 'UDD' (off), 'Alternate Code' (off), 'User Field 1' (off), 'User Field 2' (off), and 'User Field 3' (off). A callout box explains that these filters allow for further refinement based on specific data fields.

At the bottom of the sidebar are two buttons: 'Apply Filter' and 'Clear Filter'.

**Tips:** Using an asterisk (\*) at the end of a search word will complete a partial search using what has been entered:



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Combining the search function and filters allows the user to refine their search for a specific item. In the example below: an all field search has been completed on “FCDE” and a filter applied, so only “cartons” that are “in” storage and have “DEST” in user field 1 are found in the search.

The screenshot displays the IRON MOUNTAIN ReQuest portal interface. At the top, there are navigation links: "New Order", "Review Orders", "Add/Manage Inventory", "User Management", and "Reports". Below this is a search bar with a dropdown menu set to "All Fields" and the search term "FCDE\*".

On the left side, there is a filter panel with the following options:

- All Status
- In
- Pending
- Out
- Permout
- Destroyed

Below the status filters are type filters:

- All Types
- Cartons
- Files

Other filter options include:

- UDD
- Alternate Code
- User Field 1 (with a text input field containing "DEST\*")
- User Field 2
- User Field 3

At the bottom of the filter panel are buttons for "Apply Filter", "Clear Filter", and "Request Unregistered". There are also tabs for "Supplies" and "Unitemized".

The main content area shows three search results, each with a bar code, an alternate code, and user field 1 information. The results are:

Bar Code	Alternate Code	User Field 1
FCDESTP173		DEST PRO TESTING
FCDESTP172		DEST PRO TESTING
FCDESTP177		DEST PRO TESTING

Each result row includes action icons: Collect, Deliver, Perm Out, and Destroy.

## 2.3 Creating a Work Order

The Records Management Quick Order Experience can be used to create four Work Order types:

- **Collect** – Used to create a Work Order to collect items that you have at your home or office. This option can only be used on items with an “OUT” status.
- **Deliver** - Used to create a Work Order to deliver items currently “IN” storage with Iron Mountain
- **Perm Out** – Used to permanently retrieve items you no longer want stored at Iron Mountain.
- **Destroy** – Used to arrange the permanent destruction of your items.

Each item you locate in your search will have one or more the four Work Order types available for selection. To create the Work Order, start by adding items to your shopping cart using the green plus symbol. Add items that need to be collected, delivered, permed out or destroyed into one shopping cart. There is no need to create separate shopping carts for different Work Order types.

The system will automatically sort the items into the appropriate Work Orders as shown in the next step.

Depending on the current location status of your item, certain options may not be available. In the example below, the item status is “IN” so the Deliver, Perm Out and Destroy Work Order options are available but the Collect option cannot be selected:

Bar Code: FCDESTP177		Account: ON641704 / OPS			 
Alternate Code	User Field 1 DEST PRO TESTING	User Field 2	User Field 3	Status  In	
 Collect	 Deliver	 Perm Out	 Destroy		

In the next example the item status is “OUT”, so only the Collect and Perm Out options are available and Delivery and Destroy cannot be selected:

Bar Code: FCDESTP137		Account: ON641704 / OPS			 
Alternate Code	User Field 1 DEST PRO TESTING	User Field 2	User Field 3	Status  Out	
 Collect	 Deliver	 Perm Out	 Destroy		

Note: Perm out can be selected for items that are “IN” or “OUT”. If an item is “OUT” using the perm out Work Order will update the item status to permanently out and stop retention charges. If the item is “IN” the item will be delivered and then the item status is updated to permanently out.

## 2.4 Creating a Work Order: Unregistered items

If you have access to an RL account type you have the option of requesting an unregistered file delivery.

Select **“Request Unregistered”** from the main screen.

Add the ‘File Identifier’ information for file. This is the name or identifying information that Iron Mountain Information Centre team will use to locate the file inside the carton.

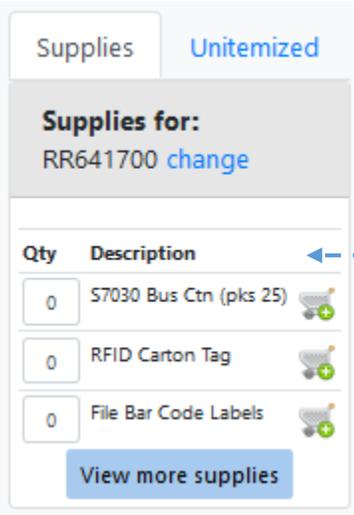
You can enter further identifier information in the short description field.

The ‘Unregistered Item Parent’ is the barcode or alternate code of the carton that the file will be located in. If using alternate code, make sure to change the drop down box.

Once you have entered all the information, select the Delivery option to add the unregistered file to your shopping cart.

## 2.5 Creating a Work Order: Supplies

Supplies can be ordered from the supplies tab found under the filter options on the main screen.



The Supplies will be charged to the account listed as your default. To update this, select “Change” and enter the new account code.

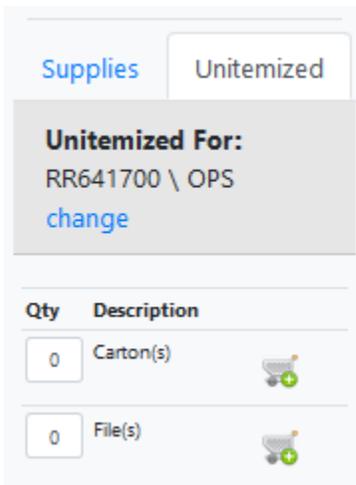
The top three most ordered supplies will appear in the quick list. This list can be expanded to show a full list of supplies by clicking “View more supplies”.

Enter the number of supplies you require – carton packs must be supplied in packs. To order cartons, please add the total number to be delivered e.g. S7030 Bus Ctn (pks 25) – These should be added as 25 for 1 pack and 50 for 2 packs.

When you have entered the required amount of supplies, use the green plus symbol to add them to your shopping cart.

## 2.6 Creating a Work Order: Unitemised Collections

An Unitemised Collection allows you to quickly raise a collection Work Order without the need to specify which carton barcodes are being collected.



The Collection Work Order will be charged to the account listed as your default, to update this select change and enter the new account code.

Update the quantity of cartons or files to be collected in the Qty box.

When you have entered the quantity to be collected use the green plus symbol to add them to your shopping cart.

## 2.7 Submitting a Work Order

Once you have located the items or supplies you wish to order, click the green plus symbol next to each Work Order type and the items will be added to your shopping cart.

You can add items that need to be collected, delivered, permed out or destroyed to the same shopping cart and your items will be automatically sorted into the required Work Orders.

In this example, 6 items were added to the shopping cart including two items to be delivered, three to be collected and one to be permanently retrieved. These have been sorted into four work orders based on the account code, item status and requested Work Order by the Quick Order system.



The screenshot shows the IRON MOUNTAIN ReQuest portal interface. At the top left, there is a navigation menu with the following items: New Order, Review Orders, Add/Manage Inventory, User Management, and Reports. At the top right, there are icons for search, user profile, and a search bar labeled "Search For More Items". The main content area displays a list of four work orders, each with a unique ID and a description, and a count of items in the cart for each work order.

ON641704 - Retrieve Order	# 1 of 4
RR641700 - Retrieve Order	# 2 of 4
ON641704 - Store Order	# 3 of 4
ON641704 - Perm Out Order	# 4 of 4

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Please review your order details for each Work Order, prior to sending them to Iron Mountain.

For each Work Order, fill out the Work Order form in full to confirm where and when the Work Order will be completed. Once complete, click “Send Order”.

**Select the Delivery method**      **Choose your Service Priority**      **Enter contact detail and requester information**

QN641704 - Retrieve Order # 1 of 4

Charge account: ON641704 \ OPS change

Service:  Scheduled  Address and Priority

Iron Mountain will deliver items to me  
 Iron Mountain will ship to me (third party)  
 I will pickup or view items at Iron Mountain

Delivery Address:  
test address, ,

Priority

<b>ROUTINE</b> Delivery date: 19/06/2020 5:00:00 PM Max: 40	<b>PRIORITY</b> Delivery date: 19/06/2020 12:00:00 PM Max: 25	<b>URGENT</b> Delivery date: 18/06/2020 5:17:36 PM Max: 10
---	---	--

Contact Name: Iron Mountain Phone Number: Phone Number

PO Number: PO Number

Special Instructions

Items to delivery: 1

FCDSTP172 Iron Mountain Cost Center Comment Apply to All

**Send Order**

Once you have sent the order to Iron Mountain, you will be provided with a confirmation which includes your Work Order number. Ensure to reference the Work Order number if you have any queries.

IRON MOUNTAIN ReQuest™

New Order Review Orders Add/Manage Inventory User Management Reports

Search For More Items

RR641700 - Retrieve Order submitted: 0479351 # 1 of 1

Charge account: RR641700 \ OPS

Iron Mountain will deliver items to me  
 Iron Mountain will ship to me (third party)  
 I will pickup or view items at Iron Mountain

Delivery Address:  
Iron, Mountain, Australia

Priority

<b>ROUTINE</b> Delivery date: 22/06/2020 5:00:00 PM Max: 50	<b>PRIORITY</b> Delivery date: 22/06/2020 12:00:00 PM Max: 25	<b>URGENT</b> Delivery date: 19/06/2020 5:05:00 PM Max: 10
---	---	--

## 3.0 ADD INVENTORY ONLINE

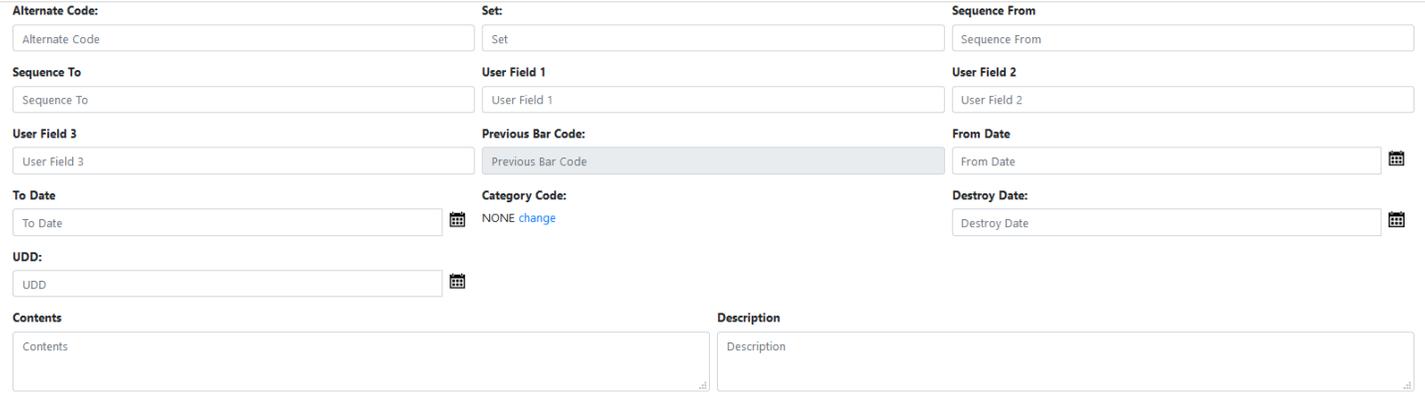
Add Online allows you to register your new items prior to them being collected for the first time. While registering the items you can also add information against that item to make it easier to locate and categorise. This information can be anything from codes, dates, addresses or descriptions. The information is then viewable on Inventory reports enabling you to track and filter what items you have in storage.

Note: Charges may apply for using the Add Inventory Online service. Please discuss any questions with your Account Manager or Customer Account Support Specialist.

### 3.1 Add Inventory setup

To get started, complete the “Records Management Add Online Service Set-Up Form” located on the Iron Mountain support Page <https://www.ironmtn.com.au/support> for AU customers or <https://www.ironmountain.co.nz/support> for NZ customers.

Add Online is fully customisable for the user. The information you store against your items goes into description fields either in a date format or as text. In the below screenshot you can see all of the fields that can be used:



The screenshot displays a form with the following sections and fields:

- Alternate Code:** Alternate Code
- Set:** Set
- Sequence From:** Sequence From
- Sequence To:** Sequence To
- User Field 1:** User Field 1
- User Field 2:** User Field 2
- User Field 3:** User Field 3
- Previous Bar Code:** Previous Bar Code
- From Date:** From Date
- To Date:** To Date
- Category Code:** NONE change
- Destroy Date:** Destroy Date
- UDD:** UDD
- Contents:** Contents
- Description:** Description

The name of these fields is referred to as a label and can be renamed, so that they align with your business requirements. For example: “To Date” could be updated to “Birthdate”; “UDF1” could be updated to “Address Line 1.”

In addition to renaming the field labels, you can also:

- Change if a field is visible
- Make a field mandatory entry
- Require double entry of information.

# RECORDS MANAGEMENT PORTAL USER GUIDE



To rename a field label enter the new description in the "Customised Field Label" column.

Under the "ADD NEW INVENTORY" column confirm which fields should be Visible, Mandatory or Double entry.

## Records Management (AU & NZ) Add Online Setup Form



Company Name:

Level 1:  Level 2:  Level 3:

Requestor:  Requestor Signature:

**CARTON data to be captured HERE**

STANDARD FIELD LABEL	CUSTOMISED FIELD LABEL (IF APPLICABLE)	EDIT EXISTING INVENTORY			ADD NEW INVENTORY			REVIEW & SUBMIT INVENTORY		
		Visible, Y/N	Mandatory	Double Entry	Visible, Y/N	Mandatory	Double Entry	Visible, Y/N	Mandatory	Double Entry
Iron Mountain Barcode										
User Defined Date (YYYY/MM/DD)					N					
Sequence To (15 characters)					N					
Sequence From (15 characters)					N					
Date Range To (YYYY/MM/DD)	Birthdate				Y	✓				
Date Range From (YYYY/MM/DD)					N					
Destroy Date (YYYY/MM/DD)					Y	✓				
Contents (80 characters per line)					Y					
UDF1 (25 characters)	Address Line 1				Y					
UDF2 (25 characters)	Address Line 2				Y					
UDF3 (25 characters)	Address Line 3				Y					
Alternate Code (15 characters, unique per level 2/3 account)										
Add Date (System generated, no data entry available)										
Short Description (40 characters)					Y					
Long Description (255 characters per line)					N					
		Edit Existing Inventory			Add New Inventory			Review & Submit Inventory		
Additional Field Label <small>If required. The below fields require additional information to be supplied for set up to be completed.</small>	Customised Field Label (If Applicable)									
Category Code					N					
Record Series Code					N					

In this example the settings have been applied and you can see the fields that were no longer required have been removed and others (in red) are now mandatory as requested on the Setup form:

**Box Bar Code**  
demodemo55

Account Level 2/3 : ON641704 [change](#) Status: ⚠ Pending  
Status Date: 23/06/2020

Add Date: 23/06/2020

---

**Alternate Code:**  User Field 1  User Field 2

**User Field 3**  To Date  Destroy Date:

**Contents**  **Description**

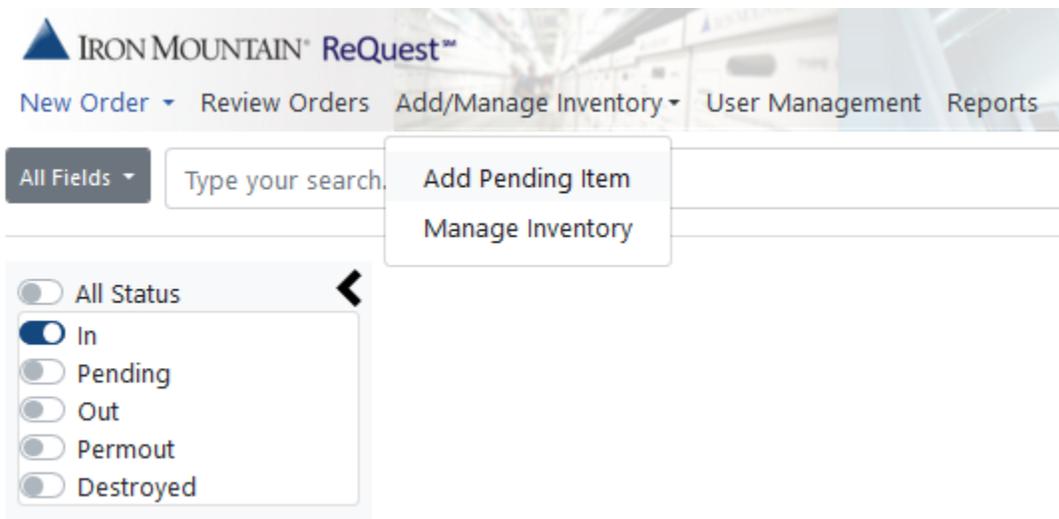
To allow further customisation, different settings can be used for files and cartons. Page one of the Setup form is for files settings and page two for cartons.

Note: The **Edit Existing Inventory** column is for managing Inventory online which is covered in the next section of this guide. Review and Submit Inventory is not applicable to Quick Order.

## 3.2 Creating a pending item with Add Online

A new item added using the Add Inventory online system will have a pending status until it is collected by an Iron Mountain driver.

To lodge a pending item, from the main Quick Order menu select “Add/Manage Inventory” and then select “Add Pending Item” from the drop down menu:



You will then see a list of accounts you have access to and for each an action to add a box or a file. In this example the “RE” account does not allow the add options, this is due to the function not being added to that account.

The screenshot shows a table of accounts with their respective actions. The 'RE' account (RE641703) does not have 'Add Box' or 'Add File' options.

Account	Action
ON641704	Add Box  Add File
RE641703	Add Box  Add File
RL641701	Add Box  Add File
RR641700	Add Box  Add File

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Select the appropriate action against the account the item belongs to. For example: if a carton barcode was ordered from account ON641704 then it must be added to that account.

Enter the barcode and press “Enter”, reenter the barcode and press “Enter” again. You can now fill the fields where you wish to add information. Select “Save” once complete.

**Account** ON641704 **Action**

**Box Bar Code**  
demo55demo

Account Level 2/3 :ON641704 \ OPS [change](#) Status: ⚠ Pending  
Add Date: 23/06/2020 Status Date: 23/06/2020

<b>Record Series:</b> NONE <a href="#">change</a>	<b>Alternate Code:</b> <input type="text" value="Alternate Code"/>	<b>Set:</b> <input type="text" value="Set"/>
<b>Sequence From:</b> <input type="text" value="Sequence From"/>	<b>Sequence To:</b> <input type="text" value="Sequence To"/>	<b>User Field 1:</b> <input type="text" value="User Field 1"/>
<b>User Field 2:</b> <input type="text" value="User Field 2"/>	<b>User Field 3:</b> <input type="text" value="User Field 3"/>	<b>Previous Bar Code:</b> <input type="text" value="Previous Bar Code"/>
<b>From Date:</b> <input type="text" value="From Date"/> <input type="button" value="📅"/>	<b>To Date:</b> <input type="text" value="To Date"/> <input type="button" value="📅"/>	<b>Category Code:</b> NONE <a href="#">change</a>
<b>Destroy Date:</b> <input type="text" value="Destroy Date"/> <input type="button" value="📅"/>	<b>UDD:</b> <input type="text" value="UDD"/> <input type="button" value="📅"/> <input type="checkbox"/> Permanent	

**Short Description**

**Contents**

**Description**

Once saved, the item will be added to your Inventory with a pending status and the item can be located in a search. To add the item to a Collection Work Order, please refer to Section 2.0 Placing an Order.

## 4.0 MANAGE INVENTORY ONLINE

Once an item has been lodged with Iron Mountain, regardless of the status (“IN” or “OUT”) the items information can be amended.

To edit information, locate the item in a search and select the pencil icon on the right hand side of the item information.

Bar Code: FCDESTP173		Account: ON641704 / OPS			➔ ✎ +
Alternate Code	User Field 1 DEST PRO TESTING	User Field 2	User Field 3	Status In	

Enter a new information or edit your existing information as required.

**IRON MOUNTAIN ReQuest™**  
New Order - Review Orders **Add/Manage Inventory** - User Management Reports

Editing: FCDESTP173  
Account: ON641704 / OPS  
Status Date: 15/06/2020  
Record Series: NONE [change](#)

Status: In  
Add Date: 1/08/2008  
Alternate Code:

Object Code:   
Set:

Sequence From:   
Sequence To:   
User Field 1:

User Field 2:   
User Field 3:   
Previous Bar Code:

From Date:   
To Date:   
Category Code: NONE [change](#)

Destroy Date:   
UDD:   Permanent

Short Description:   
Contents:

Description:

# RECORDS MANAGEMENT PORTAL USER GUIDE



Similar to the “Add Inventory Online”, fields setting (Visible, Mandatory or Double Entry) can be customised to suit your needs. To update this, complete the “Edit Existing Inventory” section of the Add Online Setup form.

STANDARD FIELD LABEL	CUSTOMISED FIELD LABEL (IF APPLICABLE)	EDIT EXISTING INVENTORY		
		Visible, Y/N	Mandatory	Double Entry
Iron Mountain Barcode				
User Defined Date (YYYY/MM/DD)				
Sequence To (15 characters)				
Sequence From (15 characters)				
Date Range To (YYYY/MM/DD)				
Date Range From (YYYY/MM/DD)				
Destroy Date (YYYY/MM/DD)				
Contents (80 characters per line)				
UDF1 (25 characters)				
UDF2 (25 characters)				
UDF3 (25 characters)				
Alternate Code (15 characters, unique per level 2/3 account)				
Add Date (System generated, no data entry available)				
Short Description (40 characters)				
Long Description (255 characters per line)				
		Edit Existing Inventory		
Additional Field Label If required: The below fields require additional information to be supplied for set up to be completed.	Customised Field Label (If Applicable)			
Category Code				
Record Series Code				

Which fields are Visible, Mandatory or Double Entry can be different for Edit or Add inventory. However, the field labels will be consistent across all views.

## 5.0 UPDATING PREFERENCES

To change your default charge account, contact number, address, default search filters and Delivery Preferences, select “Preferences” from the profile icon on the top right of the main screen:

**Iron Mountain**  
Preferences  
Change Password  
LOGOUT

To update the default charge account click the “Change” button.  
You can also add a contact number for Work Orders and up to 4 addresses.

**Default Information**  
Charge account: ON641704 \ OPS change  
My Phone Number: 1300 476 668

**Address**  
Default Address: Iron, Mountain, Australia

Address	Edit	Delete
Iron Mountain Australia	Edit	Delete
(Empty)	Edit	Delete
(Empty)	Edit	Delete
(Empty)	Edit	Delete

**Default Search Filters**

**Object Types**  
 Cartons  
 Files  
 Tapes

**Item Status**  
 Pending  
 In  
 Out  
 Destroyed  
 Permout

**Miscellaneous**  
 Enable automatic search by previous barcodes  
 Quick Order your Home Page

**Saved Search**

ID	Name	Delete
1	(Empty)	Delete
2	(Empty)	Delete
3	(Empty)	Delete
4	(Empty)	Delete
5	(Empty)	Delete

**Delivery Preferences:**  
Iron Mountain will deliver items to me | I will pickup or view items at Iron Mountain | Iron Mountain will ship to me (third party)

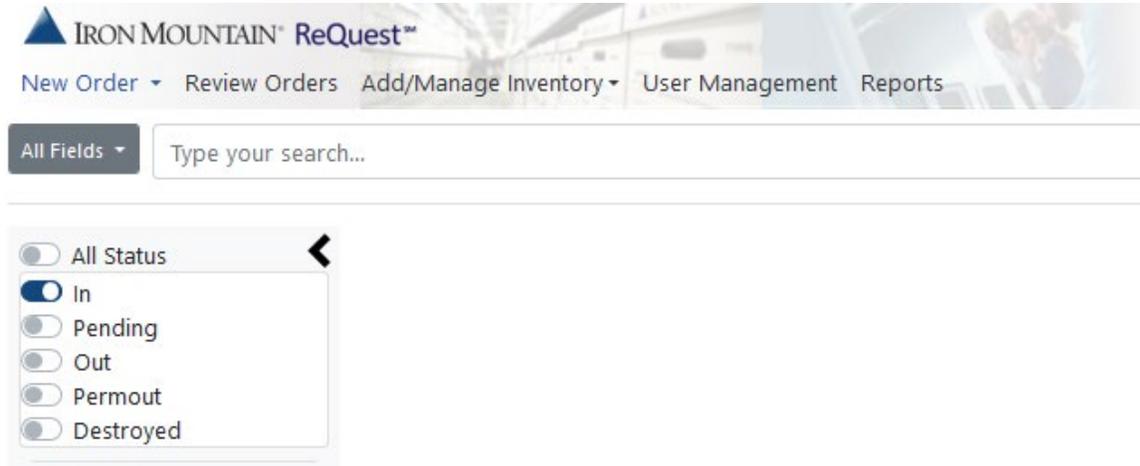
Set your Default Search filters and make “Quick Order your Home Page” by sliding the tabs for quicker searches.

Set your Delivery Preference from:

- Iron Mountain will deliver items to me (standard)
- Iron Mountain will ship to me (third party) – standard for regional customers
- I will pick-up or view items at Iron Mountain – please note that if you wish to view your items, this can be requested through our Service Delivery team.

## 6.0 REVIEW ORDERS

The Review Orders section allows you to view previous Work Orders placed using the Records Management Portal and also you can review any orders with pending approval status. Review Orders can be found on the main screen next to the New Order option. To access the Review Orders section select “Review Orders” from the menu bar.



There are 4 sub-menus that can be accessed. They include:

- Submitted - review Work Orders which are previously submitted
- Pending approval – review Work Orders placed by a level 2 or lower security user requiring approval (see security matrix on page 3 for further information on user security levels)
- Recurring order – review any items currently on a recurring scheduled Work Order
- Pending Customer Confirmation – Perm out or Destruction Work Orders pending sign off from the customer

## 6.1 Review Orders – Submitted

From the “Submitted” section you can review all previously submitted Work Orders. On first accessing the Submitted section you will be able to view the most recent 20 Work Orders placed on the accounts you have access to. This can be refined by entering search parameters including Order Dates, Contact Name, PO Number or a specific Work Order number:

Submitted Pending Approval Recurring Pending Customer Confirmation

Orders Between:  and

All Fields

- All Fields
- Contact Name
- PO Number
- Work Order Code
- Iron Mountain

Acco	Status	Item Delivery	Requested On
			22/06/2020

## 6.2 Review Orders – Pending Approval

If a Work Order is placed by a user with a security level of 0, 1 or 2 - it will need to be approved by a user with a security level of 4, 5, 6 or 9 before it is sent to Iron Mountain. This approval is actioned from the pending approval screen. Once you enter the pending approval section, any pending orders will be displayed.

For each pending work you can view the account it was booked on; the order type; contact and address details; when it was requested and how it will be delivered.

If there are multiple Work Orders an “Approve all orders” option is available.

Submitted Pending Approval Recurring Pending Customer Confirmation

Approve all orders

Order Number: Pending Approval	Account: ON641704 / OPS	Order type: Retrieve	Status: New	+
Priority ROUTINE	PO Number	Order Local Time 11:32 AM 22/06/2020	Requested By 5:00 PM 25/06/2020	
Contact Name RUSS test	Transport Option Iron Mountain will deliver items.	Address 697 GARDNERS ROAD, ALEXANDRIA NSW 2015	Total Items 1	
<input checked="" type="checkbox"/> Approve <input type="checkbox"/> Cancel				

Each Work Order can be approved or canceled by selecting the appropriate option.

Note: Work Order(s) pending approval can be seen by any users but only those with the appropriate security access will have the ability to approve or cancel the Work Order(s).

## 6.3 Review Orders – Recurring

The recurring section is used to view work orders that are setup on a regular schedule. Any recurring work order that has an item added can be viewed.

Change the level 1 account to check recurring orders setup on different accounts.

Submitted Pending Approval **Recurring** Pending Customer Confirmation

Orders For: RL641701 [change](#)

Order Numbers: 04791494		Account: RL641701	Order type: Delivery
PO Number:	Frequency	Cut Off	Requested By
Contact Name	Address	Total Items	Max Quantity
AEDT Admin	Weekly, Monday	3:00 PM 22/06/2020	12:00 PM 23/06/2020
	697 GARDNERS ROAD, ALEXANDRIA NSW 2015	1	50
 Details			

To view individual items on the recurring Work Order select “Details”.

## 6.4 Review Orders – Pending Customer Confirmation

Perm out and Destroy orders pending customer confirmation can be accessed from this menu. When this section is selected a list of outstanding work orders can be viewed.

Order Number: 04229690	Account: RR641700 / OPS	Order type: Permout
PO Number	Requested By Iron Mountain	Requested On 11/04/2017
Contact Name Iron Mountain	Delivery time	Total Items 0
<a href="#">Details</a>		

Click the “Details” button to open the Work Order

Order Details - Perm Out Order: 04229690

<b>Requested By:</b>	Iron Mountain
<b>Charge To:</b>	RR641700 / OPS
<b>PO Number:</b>	
<b>Service:</b>	SCHEDULED
<b>Contact Name:</b>	Iron Mountain
<b>Phone Number:</b>	02 9582 0111
<b>Transport Option:</b>	Customer will pickup items at Iron Mountain.
<b>Deliver To:</b>	697 GARDNERS ROAD ALEXANDRIA NSW 2015
<b>Order Local Time:</b>	11:31 AM Tuesday, 11 April 2017
<b>Will be completed by:</b>	Not applicable, waiting customer confirmation

Your request is pending your final confirmation. You must print, sign and fax this Work Order to your CARE representative to complete this Work Order.

Name: \_\_\_\_\_ Signature: \_\_\_\_\_

Before the order can be progressed it must be confirmed with Iron Mountain. You can print and sign the Work Order or simply email Iron Mountain with confirmation to proceed.

Note: Confirmation for destruction Work Orders must come from the destruction contact on the account.

## 7.0 REPORTING

In addition to giving users access to create work orders and manage inventory online the Records Management Portal also provides access to our enhanced reporting module.

From the reporting screen users can request, download and even schedule a full suite of reporting.

### 7.1 Generating a report

To open reporting select “Reports” from the main quick order menu. A new tab will open in your browser.

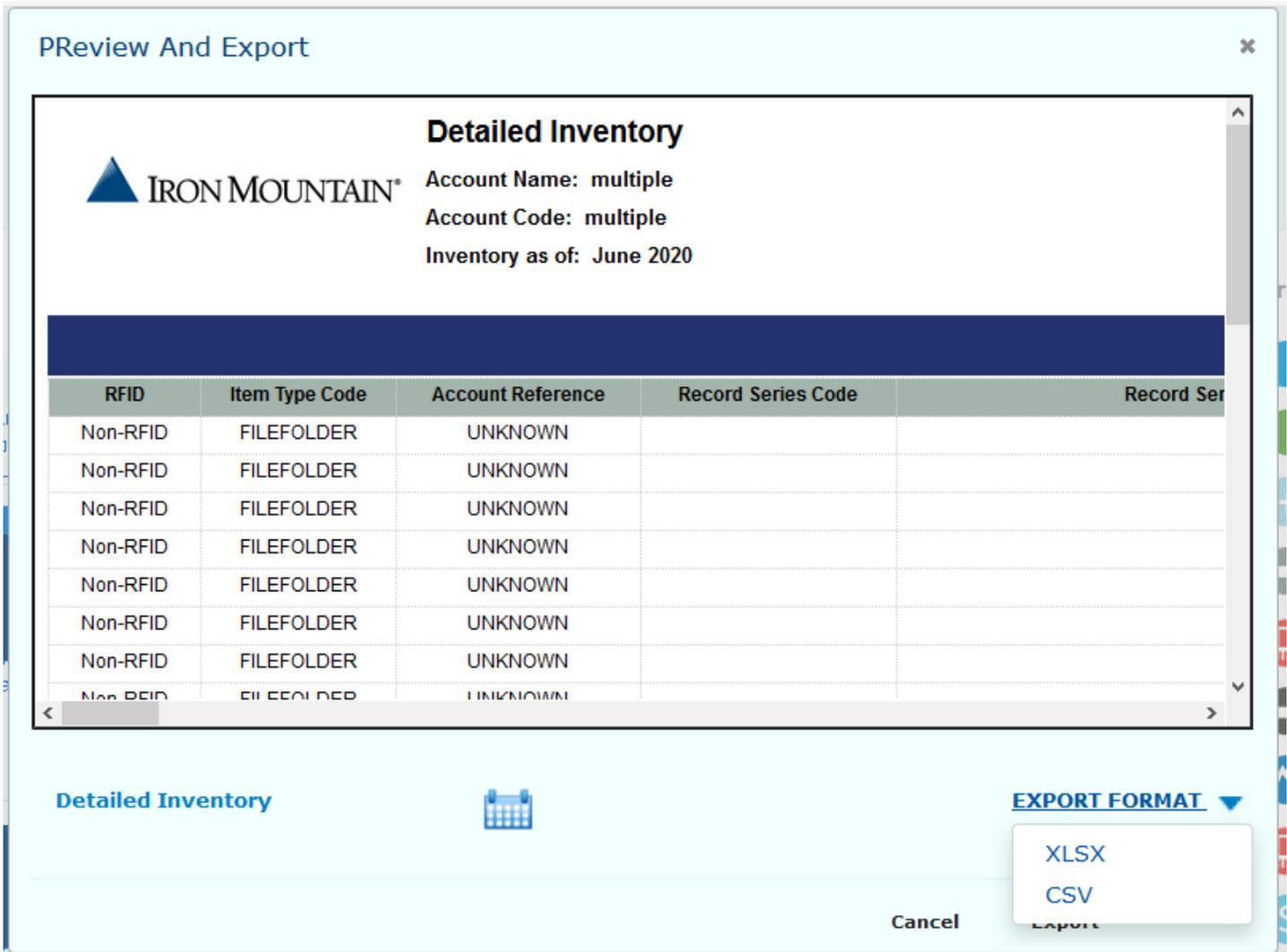
“Now Viewing” shows what accounts are currently selected which by default is “All Accounts”. The Live Holdings shows a graph view of the total cartons in holdings and how many are covered by RFID tags. This can be changed to an Items out view by changing the drop down.

To view reports for a specific account click select an account. All accounts are selected by default.

Historical reporting is also available by changing the current month, reports for the past 24 months are maintained in the portal.



Once the Account/s and Month have been selected, click on the desired report from the right hand column. The Preview and Export window will show a small preview of the report. The Calendar icon is used to schedule the report as detailed in the next section. To download the report select the Export Format and select "Export".



**Preview And Export**

**Detailed Inventory**

Account Name: multiple  
Account Code: multiple  
Inventory as of: June 2020

RFID	Item Type Code	Account Reference	Record Series Code	Record Ser
Non-RFID	FILEFOLDER	UNKNOWN		
Non-RFID	FILEFOLDER	UNKNOWN		
Non-RFID	FILEFOLDER	UNKNOWN		
Non-RFID	FILEFOLDER	UNKNOWN		
Non-RFID	FILEFOLDER	UNKNOWN		
Non-RFID	FILEFOLDER	UNKNOWN		
Non-RFID	FILEFOLDER	UNKNOWN		
Non-RFID	FILEFOLDER	UNKNOWN		

**Detailed Inventory**  **EXPORT FORMAT** ▼

XLSX  
CSV

Cancel

Note: Data intensive reports can be scheduled for automatic generation and can be emailed.

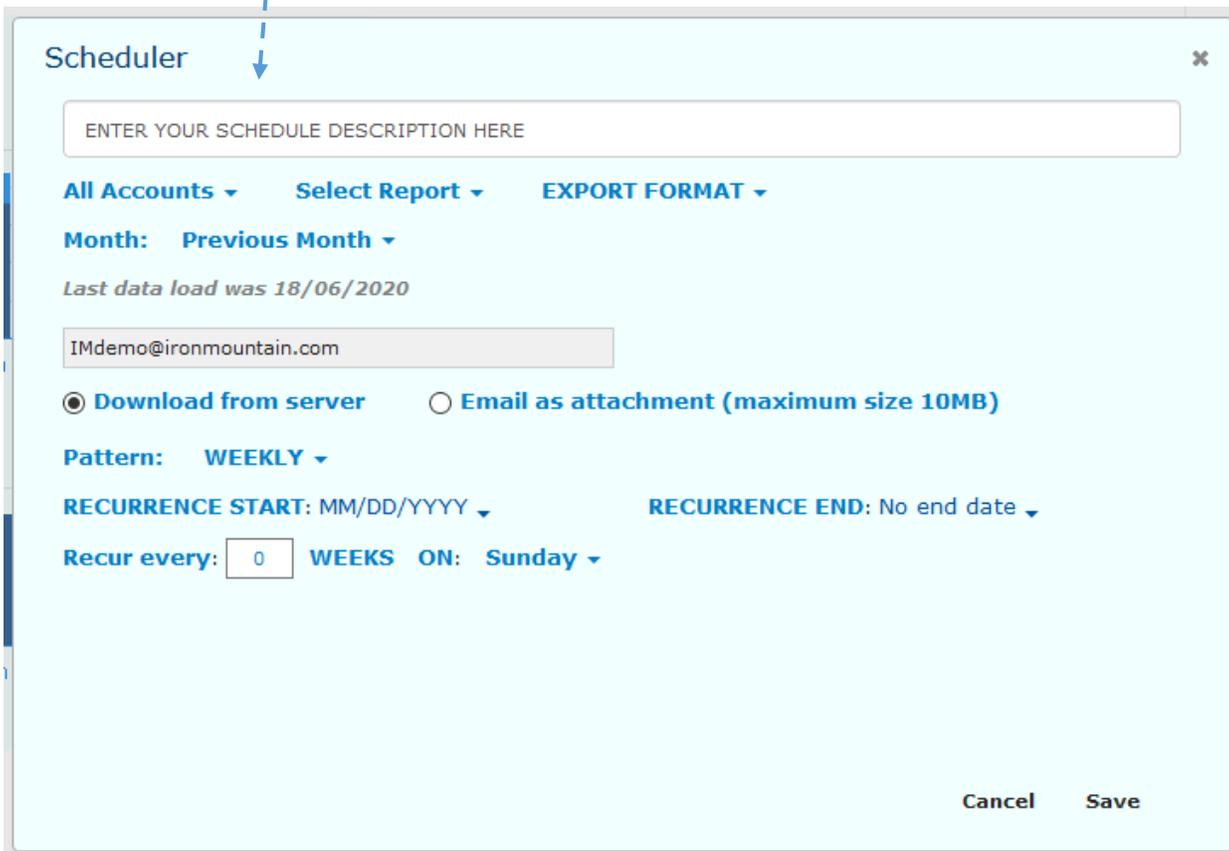
## 7.2 Scheduling a report



Select the Calendar icon to open the scheduler.

Enter a description for your schedule, select the Account, Report and Export Format using the drop-down menus.

Reports can be run for the current month of the previous month and run weekly or monthly. Complete the Recurrence options and select “Save” to schedule the report.



The screenshot shows a 'Scheduler' dialog box with the following fields and options:

- DESCRIPTION:** A text input field with the placeholder text "ENTER YOUR SCHEDULE DESCRIPTION HERE".
- ACCOUNTS:** A dropdown menu currently set to "All Accounts".
- REPORT:** A dropdown menu currently set to "Select Report".
- EXPORT FORMAT:** A dropdown menu currently set to "EXPORT FORMAT".
- MONTH:** A dropdown menu currently set to "Previous Month".
- STATUS:** A text label indicating "Last data load was 18/06/2020".
- EMAIL:** A text input field containing "IMdemo@ironmountain.com".
- DELIVERY METHOD:** Two radio button options: "Download from server" (selected) and "Email as attachment (maximum size 10MB)".
- PATTERN:** A dropdown menu currently set to "WEEKLY".
- RECURRENCE START:** A dropdown menu currently set to "MM/DD/YYYY".
- RECURRENCE END:** A dropdown menu currently set to "No end date".
- RECURRING:** A field "Recur every:" with a numeric input set to "0", followed by "WEEKS ON: Sunday".
- ACTION:** "Cancel" and "Save" buttons at the bottom right.

If using the download from server option you will need to log back in to the Reporting module to download the report. When the report is ready, the download arrow will display a number (indicating the total amount of reports that are ready for download):



## 7.3 Reports List

REPORT	DETAILS	FORMAT TO EXPORT REPORT
<b>DETAILED INVENTORY</b>	<ul style="list-style-type: none"> <li>To manage items that are in storage at Iron Mountain or located with your business.</li> <li>To provide tracking information captured against your holdings e.g. Destruction Dates.</li> <li>This report does not show the Destroyed, Perm-Out or Pending Items (items that have been added through Add Online).</li> </ul>	Excel (.xlsx) and .csv
<b>COMPLIANCE INVENTORY</b>	<ul style="list-style-type: none"> <li>To manage all holdings on your account.</li> <li>To provide tracking information captured against your holdings e.g. Destruction Dates. All fields captured include the long descriptions of items.</li> <li>Provides information on the description and contents field of the item. This information will only be displayed on this report or through the Add / Manage Inventory screen.</li> </ul>	Excel (.xlsx) and .csv
<b>NEW ITEMS</b>	<ul style="list-style-type: none"> <li>To track new items collected during a billing month. Captures the Work Order number for collection, the requestor, item type and destruction dates.</li> <li>New items may incur an Add New Fee.</li> </ul>	Excel (.xlsx) and .csv
<b>PERM-OUT ITEMS</b>	<ul style="list-style-type: none"> <li>To track items that have been permanently retrieved during a billing month.</li> <li>Retention charges will cease on any cartons that have been permanently retrieved from storage.</li> </ul>	Excel (.xlsx) and .csv
<b>DESTROYED ITEMS</b>	<ul style="list-style-type: none"> <li>To track items that have been destroyed during a billing month.</li> <li>Retention charges will cease on any cartons that have been destroyed.</li> </ul>	Excel (.xlsx) and .csv
<b>ITEMS OUT - LOAN</b>	<ul style="list-style-type: none"> <li>Provides information on items that have been retrieved from storage. Retention charges will still apply for these items.</li> <li>Shows the current days outstanding and the Work Order associated with a carton that has been retrieved.</li> <li>This data will be used to identify any items that will not be returning to storage. If an item is not returning to Iron Mountain, please notify the Iron Mountain Service Delivery Team or raise a Permanent Removal Work Order through the Records Management Portal.</li> <li>Once an item is marked permanently retrieved, retention charges for this item will cease.</li> </ul>	Excel (.xlsx) and .csv
<b>ACTIVITY REPORT</b>	<ul style="list-style-type: none"> <li>To monitor deliveries and collections that occur during the month.</li> <li>This report shows the activities for cartons and files that are in storage and will not display the supplies orders (e.g. barcodes, cartons).</li> <li>Displays address(es) from where the items were either collected from or delivered to.</li> </ul>	Excel (.xlsx) preferred

REPORT	DETAILS	FORMAT TO EXPORT REPORT
<b>ITEMS ELIGIBLE FOR DESTRUCTION</b>	<ul style="list-style-type: none"> <li>• Provides information on items that are due for destruction in the next 90 days based on the "destruction review dates" entered against the item.</li> <li>• Having a destruction date against an item is optional.</li> <li>• This information helps you to identify any items that you wish to destroy.</li> <li>• If you wish to proceed with having these items destroyed, please send your request to the Service Delivery Team to raise an order for destruction or process a destruction Work Order through the ReQuest web.</li> <li>• Alternatively, the destruction dates can be modified through the Add / Manage Inventory Tab on the ReQuest web.</li> </ul>	Excel (.xlsx) and .csv
<b>CUSTOMER DETAILED BILLING</b>	<ul style="list-style-type: none"> <li>• Provides information on the retention and activity charges for a billing month to help you with reconciling your invoices.</li> <li>• Shows what charges have been applied for retention and activity during a billing month, similar to your invoice).</li> <li>• All amounts shown on this report are exclusive of GST. Please refer to your tax invoice for payment.</li> </ul>	PDF
<b>PERFECT ORDER</b>	<ul style="list-style-type: none"> <li>• Perfect Order is one of Iron Mountain's success metrics and it is achieved when a Work Order is executed "on time" according to our standard service offerings, 100% complete and in compliance with Iron Mountain's standard operating procedures.</li> <li>• This report is used to measure your Work Order Perfect Order percentage and will display any Work Orders that have failed Perfect Order and the reason why they have failed.</li> <li>• This report can be run on a Level 1 or a specific Level 2 or 3 account.</li> </ul>	PDF
<b>DESTRUCTION AUTHORISATION</b>	<ul style="list-style-type: none"> <li>• Provides information on items that are due for destruction based on the due date captured against them.</li> <li>• If you wish to proceed with having these items destroyed, please send your request to the Service Delivery Team to raise an order for destruction or process a destruction Work Order through ReQuest web.</li> <li>• Alternatively, the destruction dates can be modified through the Add / Manage Inventory Tab on the ReQuest web.</li> </ul>	PDF
<b>SUMMARY INVENTORY REPORT</b>	<ul style="list-style-type: none"> <li>• Provides a high level summary of holdings on account (In, Out, Perm-Out, Destroyed).</li> <li>• You can view what your account holdings were at the beginning of the month, how many cartons are in storage with Iron Mountain, out with your business, perm-out or destroyed and what the holdings were at the end of the month.</li> </ul>	Excel (.xlsx) and .csv