
Custom Field Labels

IRON MOUNTAIN CONNECT™



Custom Field Labels

Custom field labels are unique, meaningful labels that replace the system-assigned, default labels. As system administrator, add custom labels to create a more intuitive user interface with labels that match the way your organization uses specific fields.

Add and manage custom field labels from within custom box and file templates.

Use this guide to learn how to:

- Add custom box field labels
- Add custom file field labels
- Display custom field labels on the Search Results and Pickup List screens and exports

Adding Custom Box Field Labels

Administration

Manage Organizations

Manage Organization Groups

Manage Supply Lists

> Manage Box Templates

Manage File Templates

Manage Addresses

Manage Record Codes

Manage Holds

Search, Retrieve

Pickups, Add Records

Order Supplies

Administration

Track Orders

Manage Box Templates

Box templates drive data entry when a user creates a box; templates control which fields are required and enabled. Assign box templates to customers. Customers not using a custom box template are automatically assigned to the default template.

Create Box Template

Reset View

Customer

Filter

View

Action

Action

Action

Action

Action

Action

Action

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

2 Select Manage Box Templates.

i Refer to the Customizing Box Templates How To training guide for more extensive information about box templates.

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Adding Custom Box Field Labels

Administration << Manage Box Templates ? Help

3 Click Create Box Template.

Box templates drive data entry when a user creates a box; templates control which fields are required and enabled. Assign box templates to customers. Customers not using a custom box template are automatically assigned to the default template.

Create Box Template

Reset View

Customer	Action
Type here then click filter	Filter
Default: ABC, CDRPT, JARR, MARR, MCARR, QA12, QA49, RC2M2, RC2M3, RC2M5 > more ⓘ	View
JSRC2	Action ▾
MFAX2	Action ▾
RC2M1	Action ▾
RC2M4	Action ▾
RC2M8	Action ▾
RC2M9	Action ▾

Search, Retrieve

Pickups, Add Records

Order Supplies

Administration

Track Orders

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Adding Custom Box Field Labels

- Administration
- Manage Organizations
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- Administration
- Track Orders

Manage Box Templates

Choose Customer

Click Box Fields.

Box Fields

Confirm

Select the customer this template applies to. You are only able to select customers that are not already associated with a box template.

Cancel

Box Fields >

Reset View

Customer ID	Customer Name	Status	Action
<input type="checkbox"/> ABC	ABC-FOR RC CALC PROJ DO NOT CHANGE	Active	
<input type="checkbox"/> CDRPT	RPT CUSTOMER FOR RCC PROJECT	Active	
<input type="checkbox"/> JARR	ARROW ELECTRONICS	Active	
<input type="checkbox"/> MARR	STOR ARREAR,BC=7,RMT=3	Active	
<input type="checkbox"/> MCARR	BILL ARREAR,BC=0,RMT=1	Active	
<input type="checkbox"/> QA12	QUALITY ASSURANCE TEST CLIENT #12	Active	
<input type="checkbox"/> QA49	QUALITY ASSURANCE TEST CLIENT #49	Active	
<input type="checkbox"/> RC2M2	M2	Active	
<input type="checkbox"/> RC2M3	M3	Active	
<input checked="" type="checkbox"/> RC2M5	RC2M5	Active	
<input type="checkbox"/> RC2M6	RC2M6	Active	
<input type="checkbox"/> RC2M7	RC2M7	Active	
<input type="checkbox"/> RC2MA	RC2MA	Active	
<input type="checkbox"/> RC2MB	RC2MB	Active	
<input type="checkbox"/> YBCF2	BILLABLE CF TEST, BC=5, REMIT=1	Active	

4

Select a customer.

5

Adding Custom Box Field Labels

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RECORDS MANAGEMENT

Welcome rc2jen USA SUPPORT LOG OUT

Administration Manage Box Templates

Choose Customer Box Fields

8 Determine which fields display and which fields are required when users create a box for this customer

Click Confirm.

Confirm >

Customer Box Number

7 To apply these custom labels to ALL custom box templates that belong to the company, click the ALL Custom Box Templates checkbox.

6 Add custom field labels. Each label can be up to 30 alphanumeric characters in length.

Example: We have added custom field labels for customer RC2M5 that will replace the default Alpha To and Alpha From labels.

Field Name	Enabled	Required	Custom Labels
SKP Barcode	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Customer Box Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Department	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="30 characters"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="30 characters"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="30 characters"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="30 characters"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="Insurance Provider ID"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="Employee Group Number"/>
From Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="30 characters"/>
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="30 characters"/>

ALL Custom Box Templates

Adding Custom Box Field Labels

- Administration
- Manage Organizations
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- > Manage Box Templates
- Manage File Templates
- Manage Addresses
- Manage Record Codes
- Manage Holds
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- Pickups, Add Records
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- Administration
- Track Orders

Manage Box Templates

Help

Choose Customer

Box Fields

Confirm

Review the box template, then click Finish to create the template.

< Box Fields

Cancel

Finish

9

Click Finish.

Summary

Organizations

Customer: RC2M5 [RC2M5] Added

Key Identifier

Customer Box Number

Box Template Summary

ALL Custom Box Templates

Field Name	Enabled	Required	Custom Labels
SKP Barcode	✓		
Customer Box Number	✓	✓	
Department	✓		
Reference 1	✓		
Major Description	✓		
Minor Description	✓		
Alpha From	✓		Insurance Provider ID
Alpha To	✓		Employee Group Number
From Date	✓		
To Date	✓		
Create Date	✓		

Adding Custom Box Field Labels

Pickup List (Add Records)
Add and edit detailed information for records you will be storing at Iron Mountain.

Enter detailed information about this box. Lock fields to retain and reuse the data that you entered, similar to using a template. *Required field >Customize Layout

*Customer RC2MS (RC2MS)	Box Division Customer Not Division-Enabled	*Box Department (lock) Select
Insurance Provider ID (lock)	Event Date (lock)	
Employee Group Number (lock)	Long Description (lock)	
From Date (lock)	To Date (lock)	
Minor Description (lock)	Create Date (lock)	
*Record Code Select	Destruction Indicator Select	Hold Code Select
Destruction Eligibility Period	Destruction Eligibility Date Select	

Example: The custom field labels that we added now display when creating a box, and throughout the application.

Save & Close Save & Add Add Files Cancel

Adding Custom File Field Labels

Administration << Manage File Templates ? Help

File templates drive data entry when a user creates a record. File templates control which fields are required and enabled. Assign templates to customers, divisions and departments. Organizations that do not have a default template are automatically assigned to the default template.

3 Click Create File Template.

2 Select Manage File Templates.

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

Why don't all organizations display?

Reset View

Template	Customers	Divisions	Departments	Action
Iron Mountain Connect	CDRPT, JARR, JSRC2, MARR, MFAX2, > more	Customer Not Division-Enabled, Customer > more	All Departments, All Departments, INS2, > more	Filter View Action Action Action Action
AL		Customer Not Division-Enabled	All Departments	Action
bd only		Customer Not Division-Enabled	All Departments	Action
JARR@_M@MED_without	JARR	Customer Not Division-Enabled	All Departments	Action
meow temp	MCARR	Customer Not Division-Enabled	All Departments	Action
RC	RC2M3	Customer Not Division-Enabled	All Departments	Action
tes		DIVONE	All Departments	Action
tes		DIVONE	All Departments	Action
TE		Customer Not Division-Enabled	All Departments	Action
tes		All Divisions	All Departments	Action
tes		Customer Not Division-Enabled	900	Action
test1303	JSRC2	TEST DIV, PRASHANT, DIVTWO, MASTER	All Departments, All Departments, All	Action

View, edit or remove file templates

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Adding Custom File Field Labels

- Administration
- Manage Organizations
- Manage Organization Groups
- Manage Supply Lists
- Manage Box Templates
- > Manage File Templates
- Manage Addresses
- Manage Record Codes
- Manage Holds
- Search, Retrieve
- Pickups, Add Records
- Order Supplies
- Administration
- Track Orders

Manage File Templates

Choose Customer Assign Organizations Customize Fields Confirm

Select the customer that will use this template. Only active customers that do not have any active divisions or departments are not included.

5 Click Assign Organizations.

Customer ID	Customer Name	Status	Action
<input type="text" value="Type here then click filter"/>	<input type="text" value="Type here then click filter"/>	All	<input type="button" value="Filter"/>
<input type="checkbox"/> ABC	ABC-FOR RC CALC PROJ DO NOT CHANGE	Active	
<input type="checkbox"/> CDRPT	RPT CUSTOMER FOR RCC PROJECT	Active	
<input type="checkbox"/> JARR	ARROW ELECTRONICS	Active	
<input type="checkbox"/> JSRC2	VC CF,BC=B,RMT=5	Active	
<input type="checkbox"/> MARR		Active	
<input type="checkbox"/> MCARR		Active	
<input type="checkbox"/> MFAX2		Active	
<input type="checkbox"/> RC2M3	RC2M3	Active	
<input checked="" type="checkbox"/> RC2M5	RC2M5	Active	
<input type="checkbox"/> RC2M6	RC2M6	Active	
<input type="checkbox"/> RC2M9	RC2M9	Active	
<input type="checkbox"/> RC2MA	RC2MA	Active	
<input type="checkbox"/> YBCF2	BILLABLE CF TEST, BC=5, REMIT=1	Active	

4 Select a customer.

Adding Custom File Field Labels

- Administration
 - Manage Organizations
 - Manage Organization Groups
 - Manage Supply Lists
 - Manage Box Templates
 - > Manage File Templates
 - Manage Addresses
 - Manage Record Codes
 - Manage Holds
-
- Search, Retrieve
 - Pickups, Add Records
 - Order Supplies
 - Administration
 - Track Orders

Manage File Templates

Choose Customer

Assign Organizations

Customize Fields

Confirm

Select divisions and departments to assign the template. Templates already assigned to this customer are shown in grey. For more information, see Online Help for more information

< Choose Customer Cancel Customize Fields >

Click Customize Fields.

Department

Type here to filter

- All
- MASTER DEPARTMENT
- 1 [CUSTOMER SERVICE]
- 2 [ACCOUNTING]
- 3 [REPAIRS]
- DCACT [ACCOUNTING FILE FORMAT DEPT]
- JOE [JOE]

Select the organizations. Refer to the Customizing File Templates How To training guide for more extensive information about this process.

Organizations Selected for RC2M6

Remove All Expand All Collapse All

DEPARTMENTS

MASTER DEPARTMENT

1 of 6 Departments Selected

Adding Custom File Field Labels

Administration << Manage File Templates >> ? Help

Manage Organizations
Manage Organization Groups
Manage Supply Lists
Manage Box Templates
> Manage File Templates
Manage Addresses
Manage Record Codes
Manage Holds

Choose Customer Assign Organizations **Customize Fields** Confirm

9 Assign a template name and choose which fields are enabled and which fields are required when a user creates a file. Use the clone functionality to copy an already existing template.

Click Confirm.

Confirm >

Template Name
Clone Existing Template Select *Required field
Key Identifier: File Description 1

Field Name	Enabled	Required	Custom Labels
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	30 characters
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	30 characters
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Birth Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	30 characters
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	30 characters
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	30 characters
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Attending Physician
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Diagnosis Code
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	30 characters
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	30 characters

1 Custom Labels

8 Add custom field labels. Each label can be up to 30 alphanumeric characters in length.

Example: We have added custom field labels for customer RC2M6 / Master Department that will replace the default File Description 1 and File Description 2 labels.

Adding Custom File Field Labels

- Administration
- Manage Organizations
- Manage Organization Groups
- Manage Supply Lists
- Manage Box Templates
- > Manage File Templates
- Manage Addresses
- Manage Record Codes
- Manage Holds
- Search, Retrieve
- Pickups, Add Records
- Order Supplies
- Administration
- Track Orders

Manage File Templates

Help

Choose Customer

Assign Orga

10

Customize Fields

Confirm

< Customize Fields

Cancel

Finish

Click Finish. The custom field labels will be visible the next time that users who have access to this customer/department log in.

Summary

Template Name

North Hills Hospital

Organization

RC2M6 [RC2M6] with 1 of the Departments selected [View details](#)

Key Identifier

File Description 1

File Template Summary

Custom Labels

Field Name	Enabled	Required	Custom Labels
Department ID	✓	✓	
Record Code	✓	✓	
From Date	✓		
To Date	✓		
Create Date	✓		
Birth Date	✓		
Discharge Date	✓		
Social Security Number	✓		
File Description 1	✓	✓	Attending Physician
File Description 2	✓		Diagnosis Code
File Description 3	✓		

Adding Custom File Field Labels

The screenshot shows the 'New File' form in the Iron Mountain Connect application. The form contains various input fields for file creation, including Customer, File Division, SKP Barcode, and several date and alphanumeric fields. A callout box highlights the custom field labels added to the form.

Example: The custom field labels that we added now display when creating a file, and throughout the application.

Form Fields:

- Add to pickup list
- Customer: RC2M6 [RC2M6]
- File Division: Customer Not Division-Enabled
- *File Department (lock): MASTER DEPARTMENT
- SKP Barcode: 9138
- Customer Box Number: 9138
- Create Date (lock)
- Alpha From (lock)
- Birth Date (lock)
- Alpha To (lock)
- Discharge Date (lock)
- Volume Number (lock)
- From Date (lock)
- Social Security Number (lock)
- To Date (lock)
- Type (lock)
- *Attending Physician (lock)
- File Description 1 (lock)
- Diagnosis Code (lock)
- File Description 2 (lock)
- File Description 3 (lock)
- File Description 4 (lock)
- *Record Code: Select
- Destruction/Embargo Date (lock): Select

Displaying Custom Labels on Grid Screens

1 Select Search, Retrieve from the left-side navigation bar.

2 Select Grid Label Preferences from the Search Tools dropdown.

i Grid Label Preferences control whether the default or custom field labels display on the following two grid screens and on exports available from these screens:

- Search Results
- Pickup List

Easily change the display from default field labels, to custom and back again.

Displaying Custom Labels on Grid Screens

IRON MOUNTAIN® CONNECT

RECORDS MANAGEMENT

Welcome rc2jen USA SUPPORT LOG OUT

Search Search Tools

Record Type
 All Boxes Files

Customer
All

Division
All

Department
All

Status
All

File Group
Select

Search

Grid Label Preferences ? Close X

You have access to customers that use custom field labels. This gives you the option to display Iron Mountain default column labels or to display a specific customer's column labels. What screens do custom labels display on?

Box-Related Column Labels Default Labels Custom Labels

Sample Iron Mountain default label display:

SKP Barcode	Customer Box Number	Division	Department	Reference 1	Major Description	Minor Description	Alpha From	Alpha To	From Date

File-Related Column Labels Default Labels Custom Labels

Sample Iron Mountain default label display:

SKP Barcode	Division	Department	From Date	To Date	Create Date	Birth Date	Social Security Number	Alpha From	Alpha To

3

The Grid Label Preferences screen opens. The first time you access this screen it is set display the default field labels. Box- and file-related field labels are controlled separately.

Search, Retrieve

Pickups, Add Records

Order Supplies

Administration

Track Orders

Retrievals (4) Reset View Export

IRON MOUNTAIN®

Displaying Custom Labels on Grid Screens

4

For box-related field labels:

- Click the Custom Labels radio button.
- Select the customer that you wish to display custom field labels for.

For file-related field labels:

- Click the Custom Labels radio button.
- Select the customer, division and department that you wish to display custom field labels for.

Grid Label Preferences [?] Close [X]

You have access to customers that use custom field labels. This gives you the option to display Iron Mountain default column labels or to display a specific customer's column labels. [What screens do custom labels display on?](#)

Box-Related Column Labels Default Labels Custom Labels

Select a customer to display their custom labels on most grid screens.

Customer: RC2M5 [RC2M5]

Sample custom label display: * Custom Labels

Department	Reference 1	Major Description	Minor Description	Insurance Provider ID*	Employee Group Number*	From Date	To Date	Create Date	Event D

File-Related Column Labels Default Labels Custom Labels

Select an organization (customer, division, department) to display their custom labels on most screens.

Customer: RC2M6 [RC2M6] Division: Customer Not Division-Enabled Department: MASTER DEPARTMENT

Sample custom label display: * Custom Labels

Create Date	Birth Date	Discharge Date	Social Security Number	Attending Physician*	Diagnosis Code*	File Desc

Save

5

Click Save. Your custom labels now display on the Search Results and Pickup List for the selected organizations, and on exports from both of these screens.

Displaying Custom Labels on Grid Screens

Search Search Tools 1681 Search Results Help Retrievals (4)

Record Type: All Boxes Files

Customer: RC2M5 [RC2M5]

Department: All

Status: All

File Group: Select

Search

Action Request Unlisted Open Shelf File

Item Type	Customer	Division	Department	SKP Barcode	Insurance Provider ID	Employee Group Nu...	Major Description / ...	Status
BOX	RC2M5 [RC2M5]	Customer Not Division-Enabled	STANDARD [STANDARD FILE FORMAT]	23408502				At Iron I
BOX	RC2M5 [RC2M5]	Customer Not Division-Enabled	STANDARD [STANDARD FILE FORMAT]	23408503				At Iron I
BOX	RC2M5 [RC2M5]	Customer Not Division-Enabled	STANDARD [STANDARD FILE FORMAT]	23408504				At Iron I
BOX	RC2M5 [RC2M5]	Customer Not Division-Enabled	STANDARD [STANDARD FILE FORMAT]	23408505				At Iron I
BOX	RC2M5 [RC2M5]	Customer Not Division-Enabled	STANDARD [STANDARD FILE FORMAT]	23408506				At Iron I
BOX	RC2M5 [RC2M5]	Customer Not Division-Enabled	STANDARD [STANDARD FILE FORMAT]	23408507				At Iron I
BOX	RC2M5 [RC2M5]	Customer Not Division-Enabled	STANDARD [STANDARD FILE FORMAT]	23408508				At Iron I
BOX	RC2M5 [RC2M5]	Customer Not Division-Enabled	STANDARD [STANDARD FILE FORMAT]	23408509				At Iron I

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Example: The custom field labels now display when you add the columns to the grid on the Search Results screen.

Displaying Custom Labels on Grid Screens

Pickup List (Add Records)
Add and edit detailed information for records you will be storing at Iron Mountain.

Add and edit detailed information for records and select items to be picked up and stored at Iron Mountain. To place a vault services or file-only order, click the Pickup Cart to move to the Pickup Order Cart Items screen.

Add Box Add File Refile Box

Action Select Customer RC2M6 [RC2M6] Reset View Export

Record Type	SKP Bar...	Customer	Division	De...	Insurance Provider ID	Employee G...	Attending Physic...	Diagnosis Code	Status	Action
All	Type here	Type here	Type here	Type	Type here then click fil	Type here then	Type here then click	Type here then cli	All	Filter
New File	9138	RC2M6 [RC2M6]	Customer Not Division-Enabled	MA... DEPAF			Dr. Davis	J-33801	At Iron Mountain	Action
Existing Box	9138	RC2M6 [RC2M6]	Customer Not Division-Enabled	MA... DEPAF					At Iron Mountain	Action

Example: The custom field labels now display when you add the columns to the grid on the Pickup List screen.

- Search, Retrieve
- Pickups, Add Records**
- Order Supplies
- Administration
- Track Orders