



Assigning Hold Codes

**IRON MOUNTAIN CONNECT™
RECORDS MANAGEMENT**



Hold Codes

Hold codes override the retention fields on a record and prevent record destruction. As a user you are able to assign hold codes directly to boxes; administrators are able to create and assign hold codes to entire record codes and departments.

Use this guide to learn how to:

- Assign a hold code to a box
- View the hold codes assigned to a box
- Remove a hold code from a box

Refer to the *Managing Hold Codes How To* guide for information on creating hold codes and assigning/removing them to/from departments and record codes.

Assigning a Hold Code to an Existing Box

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

RECORDS MANAGEMENT

321 Search Results

Action: Request Unlisted Open Shelf File

Item Type	Customer
BOX	ABC [ABC-FOR RC CALC PROJ DO NOT CHA
BOX	ABC [ABC-FOR RC PROJ DO NOT CH
BOX	ABC [ABC-FOR RC PROJ DO NOT CH
BOX	ABC [ABC-FOR RC CALC Customer Not Division- Enabled
BOX	ABC [ABC-FOR RC CALC Customer Not Division- CB103 [LIST TEST]
BOX	ABC [ABC-FOR RC CALC Customer Not Division- DEPT B [FILE DEPARTMENT]
BOX	ABC [ABC-FOR RC CALC Customer Not Division- DEPT B [FILE DEPARTMENT]
BOX	ABC [ABC-FOR RC CALC Customer Not Division- DEPT B [FILE DEPARTMENT]
BOX	ABC [ABC-FOR RC CALC Customer Not Division- DEPT B [FILE DEPARTMENT]
BOX	ABC [ABC-FOR RC CALC Customer Not Division- DEPT B [FILE DEPARTMENT]
BOX	ABC [ABC-FOR RC CALC Customer Not Division- DEPT B [FILE DEPARTMENT]

1 To assign a hold code to an existing box (already at an Iron Mountain facility), select Search, Retrieve from the Left-Side Navigation bar. Refer to the *Searching How To* training guide to learn how to search for and locate the box.

2 Select Edit from the Action Dropdown. The Box Details tab screen opens.

i To assign a hold code to a NEW box, select Pickups, Add Records | Pickup List (add Records) and follow steps 1-5 outlined in the *Creating a New Box How To* training guide.

To assign a hold code to a box that is already on the Pickup List, select Edit from the Action dropdown to the right of the box. The Box Details tab screen opens.

Search, Retrieve

Pickups, Add Records

Order Supplies

Administration

Track Orders

Retrievals (5)

Reset View | Export

Filter

Add to Cart

Action

View Details

Edit

Request Unlisted File

Displaying 1 - 100 of 321

Assigning a Hold Code to an Existing Box

Combine hold codes and record codes to create an effective, targeted retention program.

Refer to the Calculating Retention How To training guide for more information about using record codes.

3 Click the Assign link.

If you are assigning a hold code to a NEW box, you will click the Hold Code lookup rather than the Assign link.

IRON MOUNTAIN CONNECT
RECORDS MANAGEMENT

Box Number: 20020020027

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

Receipt Date: 07/21/2000

SKP Barcode: 20020020027

*Customer Box Number: 20020020027

Major Description: BRAD MCDONALD

Minor Description: WINNIE MCFADDEN

Reference 1: [Empty]

Reference 2: [Empty]

*Record Code: [BLANK FOR DEPT B]

Destruction Eligibility Period: Undefined

Hold Codes: View Assigned | **Assign** | Remove

Save | Cancel

Page 1 of 4 | Per Page: 100 | Displaying 1 - 100 of 321

Assigning a Hold Code to an Existing Box

1 Only hold codes not already assigned to a box are available.

2 Apply filters to reduce the number of hold codes displayed.

3 Select one or more hold codes.

Hold codes are created by Iron Mountain based on your requirements.

Note: When creating a new box, you are able to select and apply one hold code only.

4 Click the hold code links to view detailed information about each hold code.

5 Click Assign Holds. The hold is not applied until you save the box.

Hold Code	Description	Action
<input type="checkbox"/> DEP	DEPTLEVELHOLDCODETEST	
<input checked="" type="checkbox"/> RAG	RAGHU	
<input checked="" type="checkbox"/> RT1	RTESTONE	
<input type="checkbox"/> ...	TEST	
<input type="checkbox"/> TES	TEST	

Assign Holds Cancel

Save Cancel

Removing a Hold Code from an Existing Box

The screenshot displays the Iron Mountain Connect interface for managing records. The main window is titled 'BOX DETAILS' for box number 20020020027, which is currently 'At Iron Mountain'. The interface includes a sidebar with search and filter options, a central form for editing box information, and a right-hand pane showing a list of retrievals.

Box Details Form:

- Customer:** ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]
- Box Division:** Customer Not Division-Enabled
- Box Department:** DEPT B [FILE DEPARTMENT]
- Location:** New Jersey, NJ
- Receipt Date:** 07/21/2000
- Box Storage Size:** 1.2
- SKP Barcode:** 20020020027
- Alpha From:** [Empty field]
- Alpha To:** [Empty field]
- Alpha From:** [Empty field]
- Alpha To:** [Empty field]
- From Date:** [Empty field]
- To Date:** [Empty field]
- Major Description:** BRAD MCDONALD
- Minor Description:** WINNIE MCFADDEN
- Reference 1:** [Empty field]
- Reference 2:** [Empty field]
- *Record Code:** [BLANK FOR DEPT B]
- Destruction Eligibility Period:** Undefined
- Long Description:** different people names here. similar names on other boxes for all this unicode keyword stuff.

Hold Codes: View Assigned | [Assign](#) | [Remove](#)

Retrievals (5):

Status	Action
All	Filter
At Iron Mountain	Add to Cart
At Iron Mountain	Action
At Iron Mountain	Add to Cart
At Iron Mountain	Action
At Iron Mountain	Add to Cart
At Iron Mountain	Action
At Iron Mountain	Add to Cart
At Iron Mountain	Action
At Iron Mountain	Add to Cart
At Iron Mountain	Action
At Iron Mountain	Add to Cart
At Iron Mountain	Action

Callout: 1 Click the Remove link.

Removing a Hold Code from an Existing Box

2 Select the hold codes that you wish to remove from the box.

3 Click Remove Holds. The hold code is not removed until you save the box.

Click the hold code links to view detailed information about each hold code.

Remove Hold Codes from Box: 2002002027

Select hold codes to remove from box(es). Once the hold is removed, the box is eligible for destruction. Note that only hold codes currently assigned to this box display. Save box(es) to remove holds.

Select All | Deselect All

Hold Code	Description
<input type="checkbox"/> type here then click	Type here then click filter
<input type="checkbox"/> RAG	RAGHU
<input checked="" type="checkbox"/> RT1	RTESTONE

Remove Holds Cancel

Save Cancel

Viewing an Existing Box's Hold Codes

IRON MOUNTAIN CONNECT
RECORDS MANAGEMENT

Box Number: 2002002027 Imaged: No Status: At Iron Mountain

BOX DETAILS FILES TRANSACTION HISTORY DATA HISTORY

Edit information about the box. *Required field

Customer	ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]	Box Division	Customer Not Division-Enabled
Receipt Date	07/21/2000	Location	New Jersey, NJ

SKP Barcode: 2002002027

*Customer Box Number: 2002002027

Major Description: BRAD MCDONALD

Minor Description: WINNIE MCFADDEN

Reference 1:

Reference 2:

*Record Code: J1-P

Destruction Eligibility Period: 11/21/2000

Destruction Indicator: Select

Destruction Eligibility Date: 11/21/2000

Hold Codes: [View Assigned](#) | [Assign](#) | [Remove](#)

1 Click View Assigned.

You are able to view hold codes assigned to a box while in View and Edit modes.

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

Page 1 of 4 Per Page: 100

Displaying 1 - 100 of 321

Viewing an Existing Box's Hold Codes

The screenshot displays the Iron Mountain Connect interface. At the top, the user is logged in as 'Welcome rc2jen' in the USA. The main navigation bar includes 'RECORDS MANAGEMENT' and a search bar. The central window shows 'Box Number: 20020020027' with 'Imaged: No' and 'Status: At Iron Mountain'. Below this, there are tabs for 'BOX DETAILS', 'FILES', 'TRANSACTION HISTORY', and 'DATA HISTORY'. A pop-up window titled 'Hold Codes Assigned to Box Number: 20020020027' is open, showing a table of hold codes. An orange callout box with the number '2' points to the 'Action' column of the table, containing the text: 'Click the hold code link to view detailed information about the hold code.'

Box Number: 20020020027 Imaged: No Status: At Iron Mountain

BOX DETAILS FILES TRANSACTION HISTORY DATA HISTORY

Edit information about the box. *Required field

Hold Codes Assigned to Box Number: 20020020027

Hold codes currently assigned to this box. Click to view detailed information about a hold code.

Hold Code	Description	Hold Type	Action
<input type="text" value="Type here then click filter"/>	<input type="text" value="Type here then click filter"/>	<input type="text" value="Type here then click filter"/>	<input type="button" value="Filter"/>
DEP	DEPTLEVELHOLDCODETEST	Box Hold	
RAG	RAGHU	Box Hold	
RT1	RTESTONE	Box Hold	

Page 1 of 1 Per Page: 100 Displaying 1 - 3 of 3

Cancel

Save Cancel

Page 1 of 7 Per Page: 50 Displaying 1 - 50 of 321

Viewing an Existing Box's Hold Codes

3 Detailed information about the hold displays. Hold codes are created and maintained by Iron Mountain.

Box Number: 2002002027 Imaged: No Status: At Iron Mountain Close X

BOX DETAILS FILES TRANSACTION HISTORY DATA HISTORY

Hold Code: DEP ? Close X

HOLD DETAILS

Information about this hold code.

Customer ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]	Boxes on Hold 79
Hold Code DEP	Hold Description DEPTLEVELHOLDCODETEST
Review Date 08/08/2016	Approval Date 08/08/2016
Requestor TESTINGONE	Approver TESTONE
Requestor Phone 1231231231	Approver Phone 7411268718

Notes
TEST

Close

Save Cancel

4 Click Close.

Welcome rc2jen USA SUPPORT LOG OUT

Retrievals (5)

Reset View Export

Status	Action
All	Filter
At Iron Mountain	Add to Cart Action
At Iron Mountain	Add to Cart Action
At Iron Mountain	Add to Cart Action
At Iron Mountain	Add to Cart Action
At Iron Mountain	Add to Cart Action
At Iron Mountain	Add to Cart Action
At Iron Mountain	Add to Cart Action
At Iron Mountain	Add to Cart Action
At Iron Mountain	Add to Cart Action
At Iron Mountain	Add to Cart Action
At Iron Mountain	Add to Cart Action

Search, Retrieve

Pickups, Add Records

Order Supplies

Administration

Track Orders

Page 1 of 7 Per Page: 50

Displaying 1 - 50 of 321

Viewing an Existing Box's Hold Codes

IRON MOUNTAIN CONNECT

RECORDS MANAGEMENT

Box Number: 20020020027 Imaged: No Status: At Iron Mountain

BOX DETAILS FILES TRANSACTION HISTORY DATA HISTORY

Edit information about the box. *Required field

Hold Codes Assigned to Box Number: 20020020027

Hold codes currently assigned to this box. Click to view detailed information about a hold code.

Hold Code	Description	Hold Type	Action
DEP	DEPTLEVELHOLDCODETEST	Box Hold	Filter
RAG	RAGHU	Box Hold	Filter
RT1	RTESTONE	Box Hold	Filter

5 Click Cancel when you have finished viewing the hold codes. You are returned to the Box Details screen.

Cancel

Save Cancel

Per Page: 100 Displaying 1 - 3 of 3

Per Page: 50 Page 1 of 7

Displaying 1 - 50 of 321