

Calculating Retention

Iron Mountain Connect Records Management's flexible design enables it to meet the retention needs of a wide variety of organizations.

A retention program ensures that your organization:

- Stores the proper records at an Iron Mountain facility for the proper amount of time.
- Destroys the proper records in a timely manner.
- Adheres to state and federal laws and industry regulations.
- Effectively manages your retention program and reduces the risks and costs associated with under- and over-retention of records.



Retention Options

Iron Mountain's account team works with your organization to assess your retention needs and set up the retention option that best meets them.

Your retention option determines how a record code and the associated destruction data fields function. The following options are available:

- Retention is Not Calculated: The record code and destruction data that you
 enter are informational only; no automatic calculations are performed.
- Retention is Calculated: Iron Mountain Connect Records Management can be set up to calculate retention as follows:
 - Automatic Calculation from Setup Date Forward: Automatically calculate retention for all boxes created AFTER contracting to use retention functionality.
 - 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 organization is able to manually override automatic calculations as necessary to accommodate exceptions.



Record Codes

Record codes drive retention policy by automatically calculating the length of time a record will be retained.

Record codes are defined at the enterprise, customer and department levels.

Record codes can be used with hold codes. Holds can be applied to an entire record code.

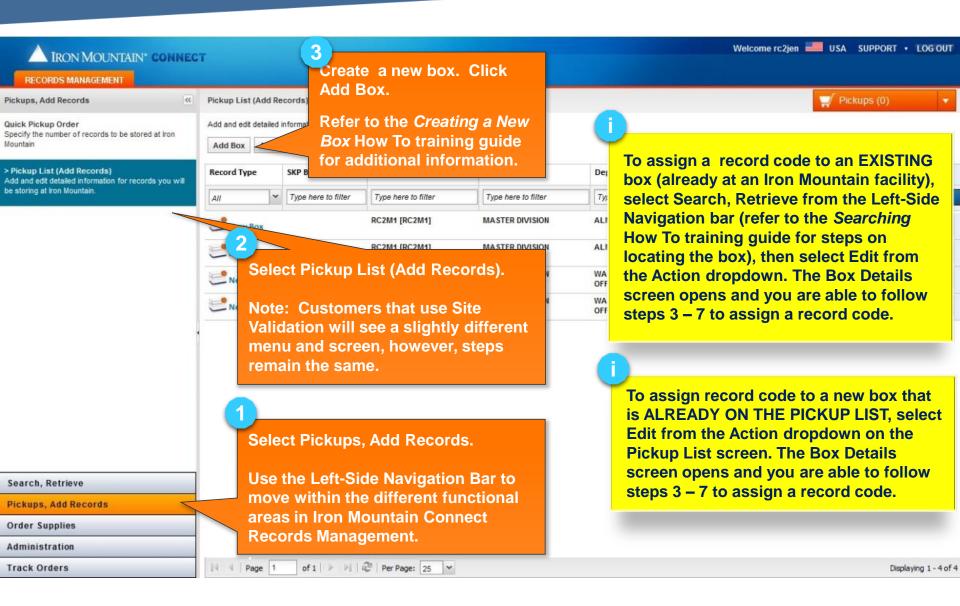


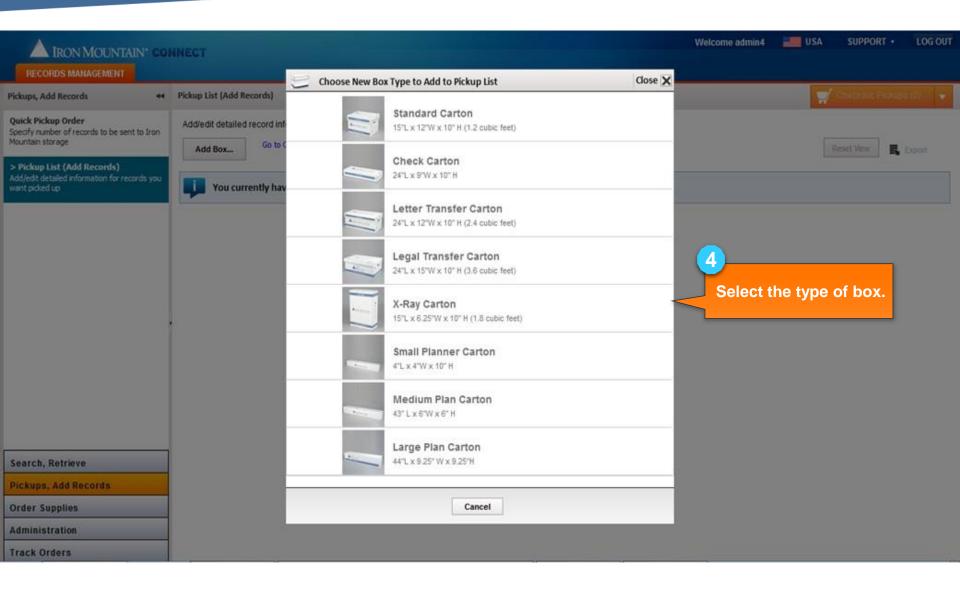
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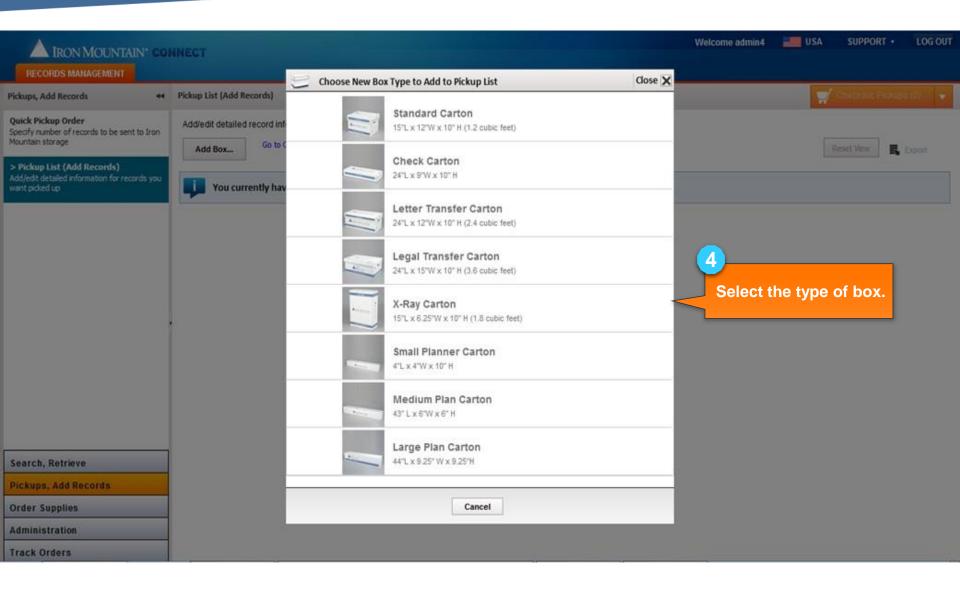
Use this guide to learn how to:

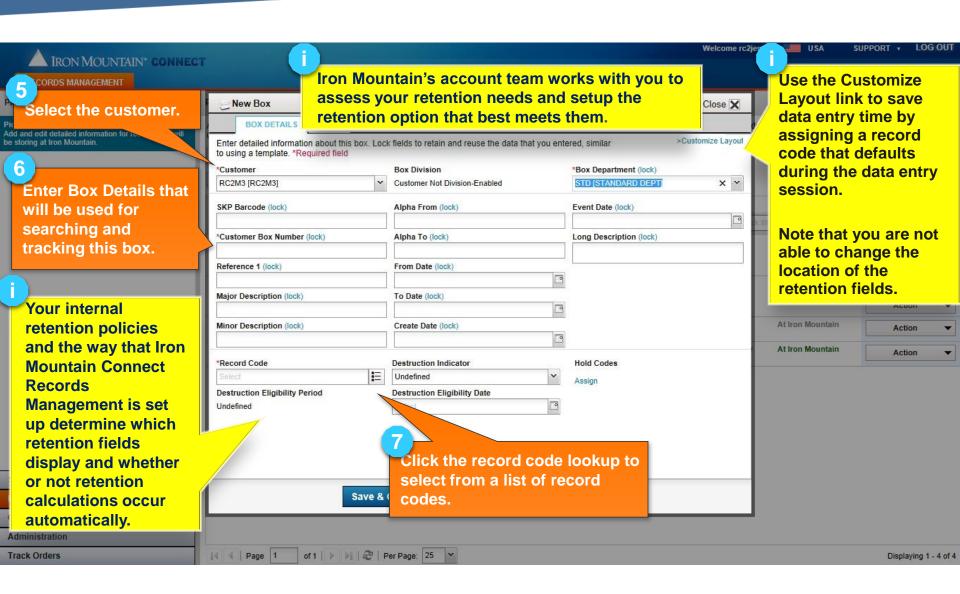
- Assign record codes to a box or a file
- Remove record codes from a box or file
- View record codes assigned to a box or file

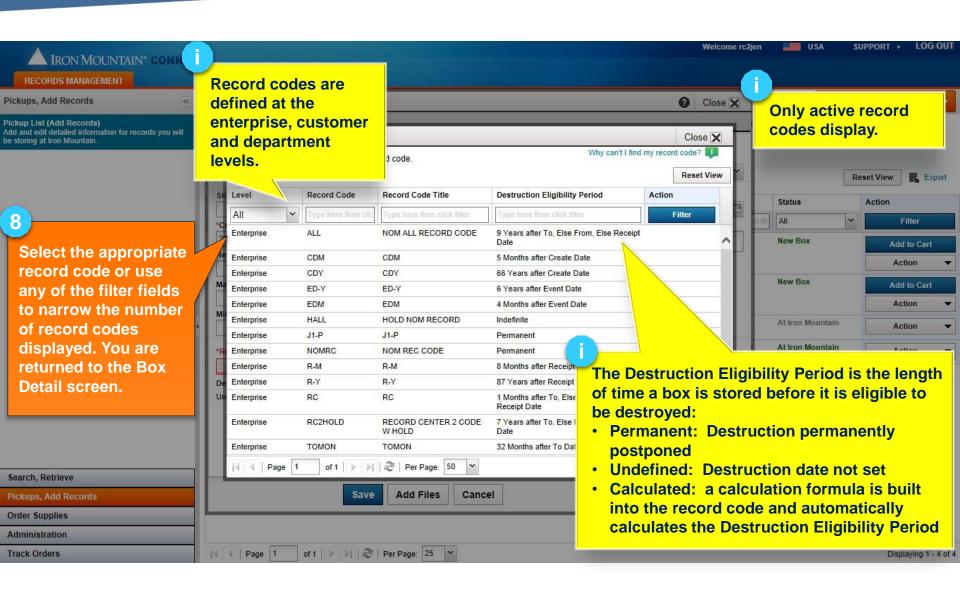


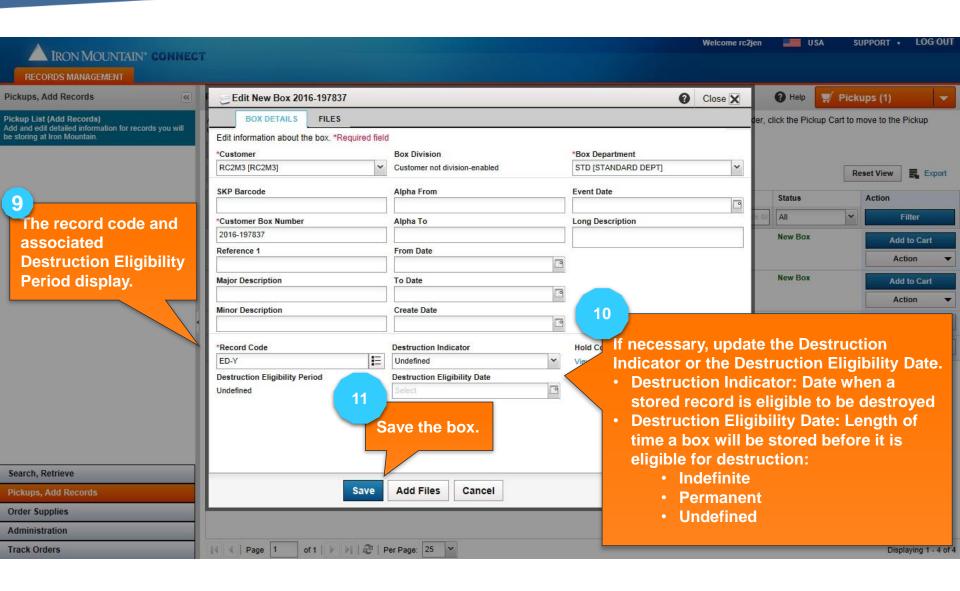




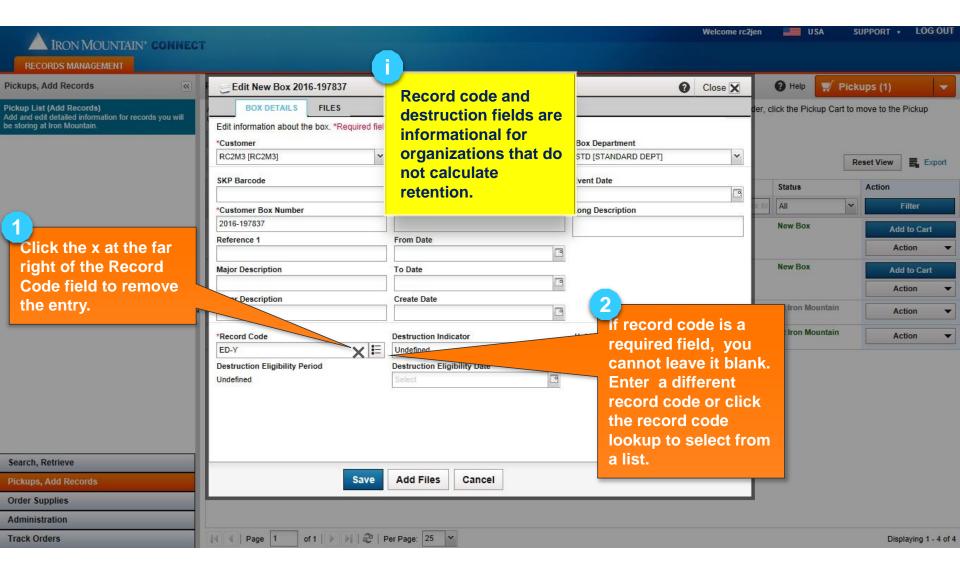


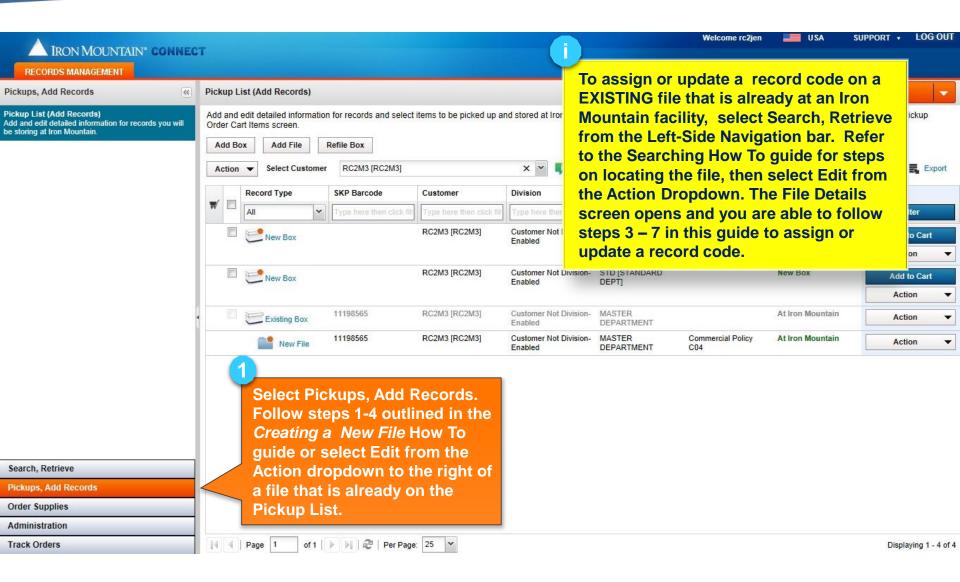


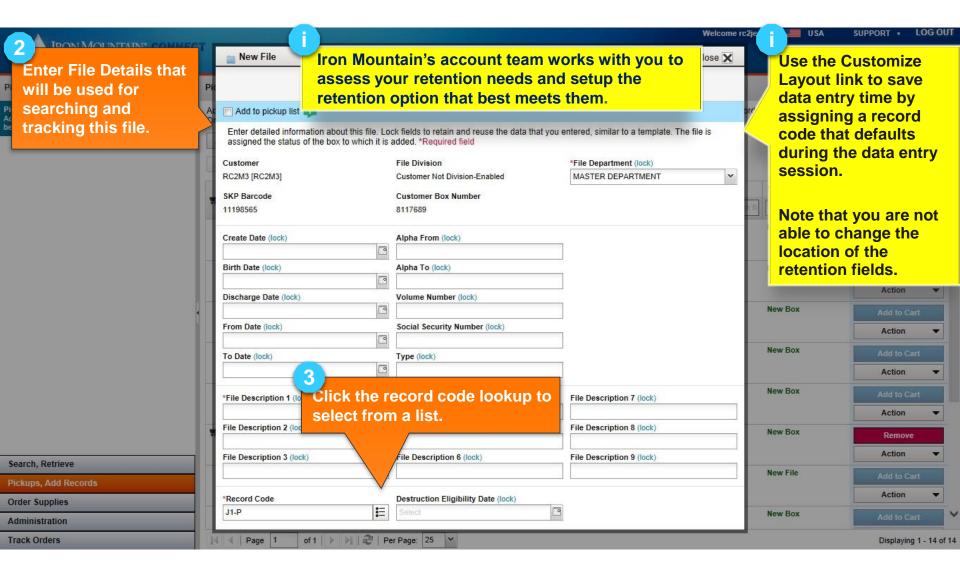


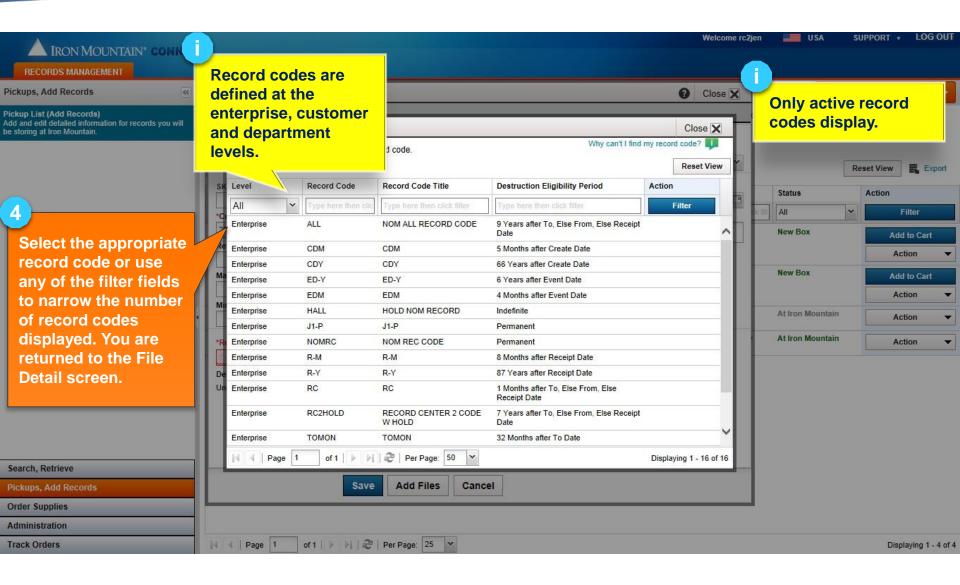


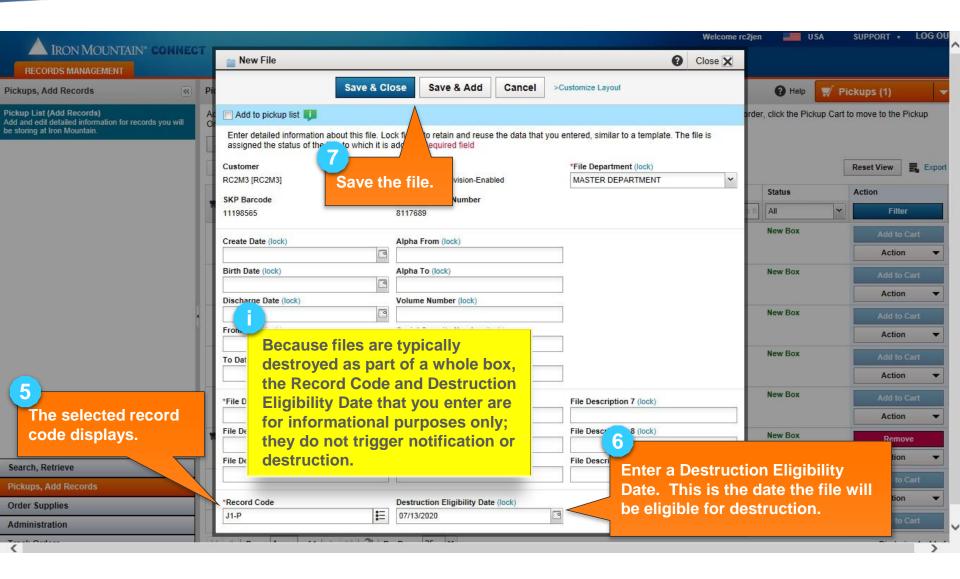
Removing a Record Code from a New Box











Removing a Record Code from a New File

