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# Calculating Retention

**IRON MOUNTAIN CONNECT™  
RECORDS MANAGEMENT**



# 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.

# Calculating Retention

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

# Assigning a Record Code to a New Box

The screenshot shows the Iron Mountain Connect web application interface. The top navigation bar includes the logo, user name 'Welcome rc2jen', and links for 'USA', 'SUPPORT', and 'LOG OUT'. The main content area is titled 'RECORDS MANAGEMENT' and 'Pickups, Add Records'. A left-side navigation bar contains options like 'Search, Retrieve', 'Pickups, Add Records', 'Order Supplies', 'Administration', and 'Track Orders'. The main area displays a 'Pickup List (Add Records)' screen with an 'Add Box' button and a table of records. Three orange callout boxes provide step-by-step instructions: 1. Select 'Pickups, Add Records' in the navigation bar. 2. Select 'Pickup List (Add Records)'. 3. Click 'Add Box'. Two yellow callout boxes provide additional information: one for existing boxes and one for boxes already on the pickup list. The bottom of the screen shows a pagination bar with 'Page 1 of 1' and 'Per Page: 25'.

**1** Select Pickups, Add Records.  
Use the Left-Side Navigation Bar to move within the different functional areas in Iron Mountain Connect Records Management.

**2** Select Pickup List (Add Records).  
Note: Customers that use Site Validation will see a slightly different menu and screen, however, steps remain the same.

**3** Create a new box. Click Add Box.  
Refer to the *Creating a New Box How To* training guide for additional information.

**i** To assign a record 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 for steps on locating the box), then select Edit from the Action dropdown. The Box Details screen opens and you are able to follow steps 3 – 7 to assign a record code.

**i** To assign record code to a new box that is **ALREADY ON THE PICKUP LIST**, select Edit from the Action dropdown on the Pickup List screen. The Box Details screen opens and you are able to follow steps 3 – 7 to assign a record code.

# Assigning a Record Code to a New Box

The screenshot displays the Iron Mountain Connect web application interface. At the top, the logo 'IRON MOUNTAIN CONNECT' is visible on the left, and user information 'Welcome admin4 USA SUPPORT LOG OUT' is on the right. The main navigation bar includes 'RECORDS MANAGEMENT' and 'Pickups, Add Records'. A central dialog box titled 'Choose New Box Type to Add to Pickup List' is open, listing several box options:

Box Type	Dimensions	Volume
Standard Carton	15"L x 12"W x 10" H	1.2 cubic feet
Check Carton	24"L x 9"W x 10" H	
Letter Transfer Carton	24"L x 12"W x 10" H	2.4 cubic feet
Legal Transfer Carton	24"L x 15"W x 10" H	3.6 cubic feet
X-Ray Carton	15"L x 6.25"W x 10" H	1.8 cubic feet
Small Planner Carton	4"L x 4"W x 10" H	
Medium Plan Carton	43" L x 6"W x 6" H	
Large Plan Carton	44"L x 9.25" W x 9.25"H	

An orange callout bubble with the number '4' and the text 'Select the type of box.' points to the list of box types. The dialog box also features a 'Cancel' button at the bottom and a 'Close' button in the top right corner.



# Assigning a Record Code to a New Box

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An orange callout bubble with the number '4' and the text 'Select the type of box.' points to the list of box types. The dialog box also features a 'Cancel' button at the bottom.



# Assigning a Record Code to a New Box

**5** Select the customer.

**6** Enter Box Details that will be used for searching and tracking this box.

**7** Click the record code lookup to select from a list of record codes.

**i** Iron Mountain's account team works with you to assess your retention needs and setup the retention option that best meets them.

**i** Use the Customize Layout link to save data entry time by assigning a record code that defaults during the data entry session.

Note that you are not able to change the location of the retention fields.

**IRON MOUNTAIN CONNECT**  
RECORDS MANAGEMENT

Welcome rc2je... USA SUPPORT LOG OUT

**New Box** Close X

**BOX DETAILS** >Customize Layout

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

\*Customer RC2M3 [RC2M3] Box Division Customer Not Division-Enabled \*Box Department (lock) STD [STANDARD DEPT] X

SKP Barcode (lock) Alpha From (lock) Event Date (lock)

\*Customer Box Number (lock) Alpha To (lock) Long Description (lock)

Reference 1 (lock) From Date (lock)

Major Description (lock) To Date (lock)

Minor Description (lock) Create Date (lock)

\*Record Code Select Destruction Indicator Undefined Hold Codes Assign

Destruction Eligibility Period Undefined Destruction Eligibility Date

Save & C

Administration Track Orders

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# Assigning a Record Code to a New Box

**8** Select the appropriate record code or use any of the filter fields to narrow the number of record codes displayed. You are returned to the Box Detail screen.

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

**i** Only active record codes display.

**i** The Destruction Eligibility Period is the length of time a box is stored before it is eligible to be destroyed:

- **Permanent:** Destruction permanently postponed
- **Undefined:** Destruction date not set
- **Calculated:** a calculation formula is built into the record code and automatically calculates the Destruction Eligibility Period

Level	Record Code	Record Code Title	Destruction Eligibility Period	Action
All	Type here then click	Type here then click filter	Type here then click filter	Filter
Enterprise	ALL	NOM ALL RECORD CODE	9 Years after To, Else From, Else Receipt Date	
Enterprise	CDM	CDM	5 Months after Create Date	
Enterprise	CDY	CDY	66 Years after Create Date	
Enterprise	ED-Y	ED-Y	6 Years after Event Date	
Enterprise	EDM	EDM	4 Months after Event Date	
Enterprise	HALL	HOLD NOM RECORD	Indefinite	
Enterprise	J1-P	J1-P	Permanent	
Enterprise	NOMRC	NOM REC CODE	Permanent	
Enterprise	R-M	R-M	8 Months after Receipt	
Enterprise	R-Y	R-Y	87 Years after Receipt	
Enterprise	RC	RC	1 Months after To, Else Receipt Date	
Enterprise	RC2HOLD	RECORD CENTER 2 CODE WHOLD	7 Years after To, Else Date	
Enterprise	TOMON	TOMON	32 Months after To Date	

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Save Add Files Cancel

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# Assigning a Record Code to a New Box

The screenshot shows the 'Edit New Box 2016-197837' form in the Iron Mountain Connect system. The form is divided into 'BOX DETAILS' and 'FILES' tabs. The 'BOX DETAILS' tab is active, showing various fields for box information. Callouts are present: callout 9 points to the 'Customer' and 'Customer Box Number' fields; callout 10 points to the 'Destruction Indicator' and 'Destruction Eligibility Date' fields; callout 11 points to the 'Save' button. The 'Destruction Eligibility Period' is currently set to 'Undefined'. The 'Save' button is highlighted in blue.

**9** The record code and associated Destruction Eligibility Period display.

**10** If necessary, update the Destruction Indicator or the Destruction Eligibility Date.

- Destruction Indicator: Date when a stored record is eligible to be destroyed
- Destruction Eligibility Date: Length of time a box will be stored before it is eligible for destruction:
  - Indefinite
  - Permanent
  - Undefined

**11** Save the box.

# Removing a Record Code from a New Box

The screenshot shows the 'Edit New Box 2016-197837' form in the Iron Mountain Connect system. The form is divided into 'BOX DETAILS' and 'FILES' tabs. The 'BOX DETAILS' tab is active, showing various fields for box information. A yellow callout box with an information icon (i) points to the 'Record Code' and 'Destruction' fields, stating: 'Record code and destruction fields are informational for organizations that do not calculate retention.' An orange callout box with the number '1' points to a small 'x' icon at the end of the 'Record Code' field, stating: 'Click the x at the far right of the Record Code field to remove the entry.' Another orange callout box with the number '2' points to the 'Record Code' field, stating: 'If record code is a required field, you cannot leave it blank. Enter a different record code or click the record code lookup to select from a list.' The form includes fields for Customer, SKP Barcode, Customer Box Number, Reference 1, Major Description, Minor Description, From Date, To Date, Create Date, Destruction Indicator, and Destruction Eligibility Date. At the bottom of the form are 'Save', 'Add Files', and 'Cancel' buttons. The top navigation bar shows 'Welcome rc2jen', 'USA', 'SUPPORT', and 'LOG OUT'. The left sidebar contains 'Pickups, Add Records' and 'Pickup List (Add Records)'. The right sidebar shows a 'Pickups (1)' dropdown and a table with columns for 'Status' and 'Action'.

**1** Click the x at the far right of the Record Code field to remove the entry.

**2** If record code is a required field, you cannot leave it blank. Enter a different record code or click the record code lookup to select from a list.

**i** Record code and destruction fields are informational for organizations that do not calculate retention.

# Assigning a Record Code to a New File

The screenshot shows the Iron Mountain Connect interface for Records Management. The main area displays a 'Pickup List (Add Records)' with a table of records. A yellow callout box with an information icon 'i' provides instructions on how to assign or update a record code. An orange callout box with a number '1' provides a step-by-step instruction for selecting a file to edit.

**Yellow Callout Box:**

To assign or update a record code on a **EXISTING** file that is already at an Iron Mountain facility, select **Search, Retrieve** from the **Left-Side Navigation bar**. Refer to the **Searching How To** guide for steps on locating the file, then select **Edit** from the **Action Dropdown**. The **File Details** screen opens and you are able to follow steps 3 – 7 in this guide to assign or update a record code.

**Orange Callout Box:**

1 Select **Pickups, Add Records**. Follow steps 1-4 outlined in the *Creating a New File How To* guide or select **Edit** from the **Action** dropdown to the right of a file that is already on the **Pickup List**.

**Table Data:**

Record Type	SKP Barcode	Customer	Division	Location	Action
New Box	Type here then click fill	RC2M3 [RC2M3]	Customer Not Enabled		Action
New Box		RC2M3 [RC2M3]	Customer Not Division-Enabled	STD [STANDARD DEPT]	Action
Existing Box	11198565	RC2M3 [RC2M3]	Customer Not Division-Enabled	MASTER DEPARTMENT	Action
New File	11198565	RC2M3 [RC2M3]	Customer Not Division-Enabled	MASTER DEPARTMENT Commercial Policy C04	Action

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# Assigning a Record Code to a New File

**2** Enter File Details that will be used for searching and tracking this file.

**i** Iron Mountain's account team works with you to assess your retention needs and setup the retention option that best meets them.

**i** Use the Customize Layout link to save data entry time by assigning a record code that defaults during the data entry session.

Note that you are not able to change the location of the retention fields.

**3** Click the record code lookup to select from a list.

**New File**

Add to pickup list

Enter detailed information about this file. Lock fields to retain and reuse the data that you entered, similar to a template. The file is assigned the status of the box to which it is added. \*Required field

Customer RC2M3 [RC2M3]	File Division Customer Not Division-Enabled	*File Department (lock) MASTER DEPARTMENT
SKP Barcode 11198565	Customer Box Number 8117689	

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)

*File Description 1 (lock)	File Description 7 (lock)	
File Description 2 (lock)	File Description 8 (lock)	
File Description 3 (lock)	File Description 6 (lock)	File Description 9 (lock)

*Record Code J1-P	Destruction Eligibility Date (lock) Select
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- Search, Retrieve
- Pickups, Add Records
- Order Supplies
- Administration
- Track Orders

- New Box [Add to Cart]
- New Box [Add to Cart]
- New Box [Add to Cart]
- New Box [Add to Cart]
- New Box [Remove]
- New File [Add to Cart]
- New Box [Add to Cart]

# Assigning a Record Code to a New File

IRON MOUNTAIN RECORDS MANAGEMENT

Welcome rc2jen USA SUPPORT LOG OUT

RECORDS MANAGEMENT

Pickups, Add Records

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

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

Only active record codes display.

4 Select the appropriate record code or use any of the filter fields to narrow the number of record codes displayed. You are returned to the File Detail screen.

Level	Record Code	Record Code Title	Destruction Eligibility Period	Action
All	Type here then click	Type here then click filter	Type here then click filter	Filter
Enterprise	ALL	NOM ALL RECORD CODE	9 Years after To, Else From, Else Receipt Date	
Enterprise	CDM	CDM	5 Months after Create Date	
Enterprise	CDY	CDY	66 Years after Create Date	
Enterprise	ED-Y	ED-Y	6 Years after Event Date	
Enterprise	EDM	EDM	4 Months after Event Date	
Enterprise	HALL	HOLD NOM RECORD	Indefinite	
Enterprise	J1-P	J1-P	Permanent	
Enterprise	NOMRC	NOM REC CODE	Permanent	
Enterprise	R-M	R-M	8 Months after Receipt Date	
Enterprise	R-Y	R-Y	87 Years after Receipt Date	
Enterprise	RC	RC	1 Months after To, Else From, Else Receipt Date	
Enterprise	RC2HOLD	RECORD CENTER 2 CODE W HOLD	7 Years after To, Else From, Else Receipt Date	
Enterprise	TOMON	TOMON	32 Months after To Date	

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Save Add Files Cancel

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# Assigning a Record Code to a New File

The screenshot shows the 'New File' form in the Iron Mountain Connect system. The form includes fields for Customer (RC2M3 [RC2M3]), SKP Barcode (11198565), and File Department (MASTER DEPARTMENT). It also has fields for Create Date, Birth Date, Discharge Date, Alpha From, Alpha To, and Volume Number. At the bottom, there are fields for Record Code (J1-P) and Destruction Eligibility Date (07/13/2020). Callouts provide instructions: 5. 'The selected record code displays.' (pointing to the Record Code field), 6. 'Enter a Destruction Eligibility Date. This is the date the file will be eligible for destruction.' (pointing to the Destruction Eligibility Date field), and 7. 'Save the file.' (pointing to the Save & Close button).

**5** The selected record code displays.

**6** Enter a Destruction Eligibility Date. This is the date the file will be eligible for destruction.

**7** Save the file.

# Removing a Record Code from a New File

**IRON MOUNTAIN CONNECT**

RECORDS MANAGEMENT

Welcome rc2jen USA SUPPORT LOG OUT

Pickups, Add Records

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

**Edit New Box 2016-197837**

**BOX DETAILS** FILES

Edit information about the box. \*Required fields are indicated by an asterisk.

\*Customer  
RC2M3 [RC2M3]

SKP Barcode

\*Customer Box Number  
2016-197837

Reference 1 From Date

Major Description To Date

Minor Description Create Date

\*Record Code  
ED-Y

Destruction Indicator  
Undefined

Destruction Eligibility Period  
Undefined

Destruction Eligibility Date  
Select

Box Department  
STD [STANDARD DEPT]

Event Date

Long Description

Reset View Export

Status Action

All Filter

New Box Add to Cart Action

New Box Add to Cart Action

Iron Mountain Action

Iron Mountain Action

Search, Retrieve

Pickups, Add Records

Order Supplies

Administration

Track Orders

Save Add Files Cancel

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**1** Click the x at the far right of the Record Code field to remove the entry.

**2** Record code is a required field; you cannot leave it blank. Enter a different record code or click the record code lookup to select from a list.

**i** Record code and destruction fields are informational for organizations that do not calculate retention.