Creating a New Box

IRON MOUNTAIN CONNECT™ RECORDS MANAGEMENT

Creating a New Box

Create new boxes with detailed information that will help if you need to search and retrieve the box in the future.

Use this guide to learn how to:

- Create a new box

- Review and edit box details from within the pickup list

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Creating a New Box

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RECORDS MANAGEMENT

Welcome admin4   USA   SUPPORT ▾   LOG OUT

Pickups, Add Records ‹‹

Quick Pickup Order
Specify number of records to be sent to Iron Mountain storage

> Pickup List (Add Records)
Add/edit detailed information for records you want picked up

Pickup List (Add Records)

Add/edit detailed record info

Add Box...

Checkout Pickups (0)

Reset View   Export

You currently have no records in your list

3 Click Add Box.

2 Click Pickup List (Add Records).

i Organizations that contract to use Iron Mountain Site Validation to validate pickup and create a traceable chain of custody, will see a variation on this screen.

Search, Retrieve

Pickups, Add Records

Order Supplies

Administration

Track Orders

1 Select Pickups, Add Records to create a new box.

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

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4 Select the type of box.

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6 Enter Box Details that will be used for searching on and tracking this box. You must enter data in all required fields (marked with a red asterisk).

i Save data entry time by locking fields that contain data that you will reuse. The data remains in the field until you unlock.

i Click the Customize Layout link to set the required, enabled and disabled fields and to change the layout of the fields on this screen.

Note that your system administrator controls the fields and settings that appear on this screen when you login via a custom box template.

7 Save Box & Close to save all of the box details and return to the Pickup List.

OR

Save & Add Another Box to stay on this screen and continue creating boxes for the same customer.

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Pickups, Add Records   ◄◄   Pickup List (Ad

New Box   Close ✕

BOX DETAILS

Enter information about the box. "Lock" keeps values when adding another box. *indicates required   >Customize Layout

*Customer   Division   *Department (lock)
RC2S8 [RC2S8]   Customer not Division enabled   DEPT A [ACCOUNTING DEPART

SKP Box Number (lock)   Alpha From (lock)   Event Date (lock)
98765473

*Customer Box Number (lock)   Alpha To (lock)   Long Description (lock)
8765463

Reference #1 (lock)   From Date (lock)

*Major Description (lock)   To Date (lock)
Human Resources

Minor Description (lock)   Create Date (lock)
Payroll

Destruction Indicator (lock)   Destruction Date (lock)
Select   Select

Save Box & Close   Save & Add Another Box

Pickups, Add Records
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Reviewing Your Box

1 Review your box from within the pickup list.

2 Select View. The Box Details screen opens.

i You are only able to delete boxes with a status of New.

Reviewing Your Box

Click Edit to update any of the box information.

Reviewing Your Box

Save any of the changes you made to the box information.

Reviewing Your Box

Click Quick Pickup Order to schedule pickup for the boxes that you created. Refer to the Placing a Pickup Order How To training guide.

Click Export to download a .csv file containing this pickup list for your records.

Open your report, save it to your computer or cancel it.