



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

Creating a New Box

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.

2 Click Pickup List (Add Records).

3 Click Add Box.

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.

Creating a New Box

The screenshot shows the Iron Mountain Connect interface. At the top, it says 'Welcome admin4', 'USA', 'SUPPORT', and 'LOG OUT'. The main header is 'IRON MOUNTAIN CONNECT'. Below that is a navigation bar with 'RECORDS MANAGEMENT' highlighted. The left sidebar has 'Pickups, Add Records' selected, with sub-options for 'Quick Pickup Order' and '> Pickup List (Add Records)'. The main content area shows 'Pickup List (Add Records)' with an 'Add Box...' button. A modal dialog box titled 'Choose New Box Type to Add to Pickup List' is open, listing the following 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	

At the bottom of the dialog is a 'Cancel' button. An orange callout bubble with the number '4' points to the list of box types, containing the text 'Select the type of box.'

Creating a New Box

The screenshot shows the 'New Box' form in the Iron Mountain Connect system. The form is titled 'New Box' and has a 'Close' button in the top right corner. Below the title is a 'BOX DETAILS' tab. The main instruction reads: 'Enter information about the box. "Lock" keeps values when adding another box. *indicates required >Customize Layout'. The 'Customer' field is marked as required and has a dropdown menu open. The dropdown menu lists the following options: 'Select', 'QA28 [QUALITY ASSURANCE TEST CLIENT #28]', 'QA4 [QUALITY ASSURANCE TEST CLIENT #4]', 'RC2S8 [RC2S8]', and 'RC2SP [RC2SP]'. An orange callout box with the number '5' points to the dropdown menu and contains the text 'Select the Customer.' At the bottom of the form, there are three buttons: 'Save Box & Close', 'Save & Add Another Box', and 'Cancel'.

IRON MOUNTAIN® CONNECT

Welcome admin4 USA SUPPORT • LOG OUT

RECORDS MANAGEMENT

Pickups, Add Records

Pickup List (Add)

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

Add/edit details

Add Box...

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

You

Close X

BOX DETAILS

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

*Customer

Select

QA28 [QUALITY ASSURANCE TEST CLIENT #28]

QA4 [QUALITY ASSURANCE TEST CLIENT #4]

RC2S8 [RC2S8]

RC2SP [RC2SP]

5

Select the Customer.

Save Box & Close

Save & Add Another Box

Cancel

Creating a New Box

The screenshot shows the 'New Box' form in the IRON MOUNTAIN CONNECT system. The form is titled 'New Box' and has a 'Close' button in the top right. Below the title is a 'BOX DETAILS' section with a '>Customize Layout' link. The form contains several fields, many of which are marked with a red asterisk to indicate they are required. The fields are arranged in a grid-like format. At the bottom of the form, there are two buttons: 'Save Box & Close' and 'Save & Add Another Box'.

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).

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.

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.

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

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

Reviewing Your Box

IRON MOUNTAIN CONNECT

Welcome admin4 USA SUPPORT LOG OUT

RECORDS MANAGEMENT

Pickups, Add Records Pickup List (Add Records) Checkout Pickups (0)

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

Add/edit detailed record information

Add Box... Go to Quick Pick up Order to specify number of Records

Reset View Export

Record Type	SKP Box Number	Customer	Division	Department	Customer Box Number	Status	Action
BOX	98765473	RC2S8 [RC2S8]	MASTER DIVISION	DEPT A [ACCOUNTING DEPARTMENT]	8765463	New Box	Action

View
Edit
Delete

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.

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

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IRON MOUNTAIN

Reviewing Your Box

IRON MOUNTAIN CONNECT

Records Management

View New Box 8765463

BOX DETAILS

Customer RC258 [RC258]	Division MASTER DIVISION	Department DEPT A [ACCOUNTING DEPARTMENT]
SKP Box Number 98765473	Alpha From	Event Date
Customer Box Number 8765463	Alpha To	Long Description
Reference #1	From Date	
Major Description Human Resources	To Date	
Minor Description Payroll	Create Date	
Destruction Indicator Permanent	Destruction Date	

3 Click Edit to update any of the box information.

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Reviewing Your Box

IRON MOUNTAIN CONNECT

Welcome admin4 USA SUPPORT LOG OUT

RECORDS MANAGEMENT

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

Add/edit details

Add Box...

Record Type

BOX

Search, Retrieve

Pickups, Add Records

Order Supplies

Administration

Track Orders

Edit New Box 8765463

Close X

BOX DETAILS

Edit information about the box. *indicates required

* Customer: RC2S8 [RC2S8]

Division: Customer not Division enabled

* Department: DEPT A [ACCOUNTING DEPART]

SKP Box Number: 98765473

Alpha From: []

Event Date: []

* Customer Box Number: 8765463

Alpha To: []

Long Description: []

Reference #1: []

From Date: []

* Major Description: Human Resources

To Date: []

* Minor Description: Payroll

Create Date: []

Destruction Indicator: Permanent

Destruction Date: Select

Save Box Changes

Cancel

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

Customer Box Number Status Action

8765463 New Box Action

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Reviewing Your Box

IRON MOUNTAIN CONNECT

Welcome admin4 USA SUPPORT LOG OUT

RECORDS MANAGEMENT

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

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.

Type here to filter	Type here to filter	Type here to filter	Type here to filter	Type here to filter	Status	Action	
BOX	983452	RC2S8 [RC2S8]	MASTER DIVISION	DEPT A [ACCOUNTING DEPARTMENT]	999867	New Box	Action
BOX	19385667	RC2S8 [RC2S8]	MASTER DIVISION	DEPT A [ACCOUNTING DEPARTMENT]	999867	New Box	Action
BOX	98765473	RC2S8 [RC2S8]	MASTER DIVISION	DEPT A [ACCOUNTING DEPARTMENT]	8765463	New Box	Action
BOX	987401234	RC2S8 [RC2S8]	MASTER DIVISION	DEPT A [ACCOUNTING DEPARTMENT]	999867	New Box	Action
BOX	11111444559	RC2S8 [RC2S8]	MASTER DIVISION	DEPT A [ACCOUNTING DEPARTMENT]	999867	New Box	Action

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

Do you want to open or save admin4_PickupList.csv from www2.ironmountainconnect.com?

Open Save Cancel

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