Customizing Box Templates

IRON MOUNTAIN CONNECT™ RECORDS MANAGEMENT

T2.5.1 11.15

Customizing Box Templates

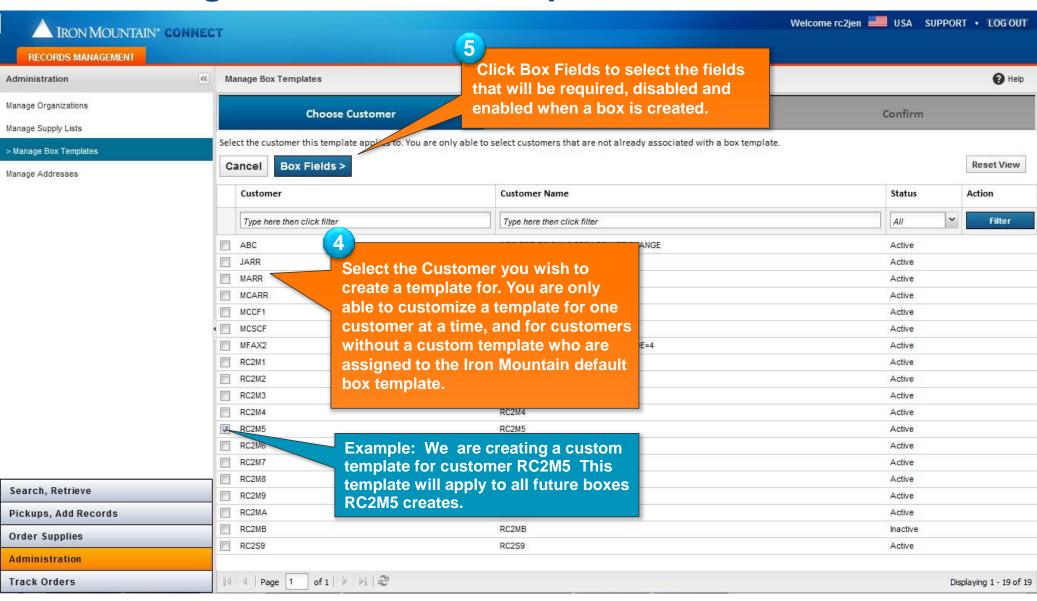Box templates control which fields display on screen and which fields must be completed when a customer creates a box.

As an administrator, you are able to define custom box templates based on a customer's specific data entry and tracking requirements.

Use this section to learn how to:

- Create custom box templates

- View and edit custom box templates

- Remove box templates

Creating a Custom Box Template

Creating a Custom Box Template

Iron Mountain® CONNECT

Welcome rc2jen USA SUPPORT ▾ LOG OUT

RECORDS MANAGEMENT

Administration

Manage Organizations

Manage Supply Lists

> Manage Box Templates

Manage Addresses

Manage Box Templates

Choose Customer

Confirm

Select the customer this template applies to. You are only able to select customers that are not already associated with a box template.

Cancel | Box Fields >

Reset View

5 Click Box Fields to select the fields that will be required, disabled and enabled when a box is created.

Customer	Customer Name	Status	Action
Type here then click filter	Type here then click filter	All	Filter
ABC	...ANGE	Active	
JARR		Active	
MARR		Active	
MCARR		Active	
MCCF1		Active	
MCSCF		Active	
MFAX2	...E=4	Active	
RC2M1		Active	
RC2M2		Active	
RC2M3		Active	
RC2M4	RC2M4	Active	
RC2M5	RC2M5	Active	
RC2M6		Active	
RC2M7		Active	
RC2M8		Active	
RC2M9		Active	
RC2MA		Active	
RC2MB	RC2MB	Inactive	
RC2S9	RC2S9	Active	

4 Select the Customer you wish to create a template for. You are only able to customize a template for one customer at a time, and for customers without a custom template who are assigned to the Iron Mountain default box template.

Example: We are creating a custom template for customer RC2M5 This template will apply to all future boxes RC2M5 creates.

Search, Retrieve

Pickups, Add Records

Order Supplies

Administration

Track Orders

Page 1 of 1 | Displaying 1 - 19 of 19

IRON MOUNTAIN®

Creating a Custom Box Template

Discard your changes and go back to the list of box templates to restart this process.

8 Click Confirm to continue to the Confirmation step in the wizard where you review your settings and create the box template.

6 Select the Key Identifier. The Key Identifier is used to identify and track boxes throughout their lifecycle.

Go back to the Choose Customer step and select different field settings. Changes you have made will be discarded.

7 Select the fields that will be required, enabled and disabled when this customer creates a box.

Example: Customer RC2M5 is set up to track boxes by box number. You can also see the fields that will appear on screen, and that are required when RC2M5 creates a new box.

Creating a Custom Box Template

Welcome rc2jen USA SUPPORT ▾ LOG OUT

Discard your changes and go back to the list of box templates to restart this process.

Box Templates

Choose Customer

9

Review the template and click Finish to save and apply it.

Confirm

Help

Review the box template, then click Finish to create the template.

< Box Fields   Cancel   Finish

Summary

Customer

M5 [RC2M5]

Key Identifier

Customer Box Number

Template Summary

code: Enabled

r Box Number: Required

Go back to the Box Fields step and select different field settings. Changes you have made will be discarded.

ent ID: Required

ce 1: Enabled

Major Description: Enabled

Minor Description: Enabled

Alpha From: Enabled

Alpha To: Enabled

From Date: Enabled

> Manage Box Templates

Manage Addresses

Search, Retrieve

Pickups, Add Records

Order Supplies

Administration

Track Orders

IRON MOUNTAIN®

6

Viewing a Custom Box Template

Example: The Iron Mountain default box template isdisplayed at the top of the list.

Example: The custom template we created for RC2M5 is displayed as a separate line item.

① Click the Action dropdown. Select View to open the View Box Template screen.

Viewing a Custom Box Template

Tab between the Box Fields screen and the History screen. The History screen displays a log of changes made to this template.

You are also able to edit and remove while in view mode.

Review the settings and click Close to return to the list of box templates.

Editing a Custom Box Template

Editing a Custom Box Template

2 Make all necessary changes. Your entries here control the fields that are required, enabled and disabled when a user creates a box.

3 Save and apply the changes to the template.

Removing a Custom Box Template

Click the Action dropdown. Sselect Remove.

Removing a Custom Box Template

2 Click Remove. The template is **permanently** removed and the customer is added back to the Iron Mountain default template.