



Customizing Box Templates

IRON MOUNTAIN CONNECT™ RECORDS MANAGEMENT

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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

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RECORDS MANAGEMENT

Administration Manage Box Templates

Manage Organizations
Manage Supply Lists
> Manage Box Templates
Manage Addresses

Box templates drive data entry when a user... templates control which fields are required and enabled. Assign box templates to customers. Customers not using a custom box template are automatically assigned to the default template.

Create Box Template

Reset View

Customer

Type here then click filter

Default: ABC, JARR, MARR, MCARR, MCCF1, MCSCF, MFAX2, RC2M1, RC2M2, RC2M3, RC2M4, RC2M5, RC2M6, RC2M7, RC2M8, RC2M9, RC2MA, RC2MB, RC2S9 JSRC2

Action

Filter

View

Action

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

2 Select Manage Box Templates.

3 Click Create Box Template.

i Review the Iron Mountain default box template; review, edit and remove custom box templates.

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Creating a Custom Box Template

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

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.

Choose Customer

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

Customer	Customer Name	Status	Action
<input type="checkbox"/> ABC		Active	
<input type="checkbox"/> JARR		Active	
<input type="checkbox"/> MARR		Active	
<input type="checkbox"/> MCARR		Active	
<input type="checkbox"/> MCCF1		Active	
<input type="checkbox"/> MCSCF		Active	
<input type="checkbox"/> MFAX2		Active	
<input type="checkbox"/> RC2M1		Active	
<input type="checkbox"/> RC2M2		Active	
<input type="checkbox"/> RC2M3		Active	
<input type="checkbox"/> RC2M4	RC2M4	Active	
<input checked="" type="checkbox"/> RC2M5	RC2M5	Active	
<input type="checkbox"/> RC2M6		Active	
<input type="checkbox"/> RC2M7		Active	
<input type="checkbox"/> RC2M8		Active	
<input type="checkbox"/> RC2M9		Active	
<input type="checkbox"/> RC2MA		Active	
<input type="checkbox"/> RC2MB	RC2MB	Inactive	
<input type="checkbox"/> RC2S9	RC2S9	Active	

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Creating a Custom Box Template

i 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.

i 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.

Determine which fields will display and which fields are required when users create a box for this customer

< Choose Customer Cancel Confirm >

Key Identifier:
Customer Box Number

Field Name	Enabled	Required
SKP Barcode	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Box Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Department ID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Reference 1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>
From	<input checked="" type="checkbox"/>	<input type="checkbox"/>
To	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Create Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Event Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Long Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Destruction Indicator	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Destruction Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Record Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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Creating a Custom Box Template

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

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

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

Box Templates

Choose Customer

Confirm

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
- ent ID: Required
- ce 1: Enabled
- Major Description: Enabled
- Minor Description: Enabled
- Alpha From: Enabled
- Alpha To: Enabled
- From Date: Enabled

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Viewing a Custom Box Template

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

Administration

Manage Organizations

Manage Supply Lists

> Manage Box Templates

Manage Addresses

Box Template

Reset View

Customer

Type here then click filter

Filter

Default: ABC, JARR, MARR, MCARR, MCCF1, MCSCF, MFAX2, RC2M1, RC2M2, RC2M3, RC2M4, RC2M6, RC2M7, RC2M8, RC2M9, RC2MA, RC2MB, RC2S9

View

JSRC2

Action

RC2M5

Action

1

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

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

Viewing a Custom Box Template

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Administration

Manage Organizations

Manage Supply Lists

> Manage Box Templates

Manage Addresses

Box template

View Box Template: JSRC2

Close

BOX FIELDS HISTORY

Determine which fields display and which fields are required when users create a box for this template.

Field Name	Enabled
SKP Barcode	✓
Customer Box Number	✓
Division ID	✓
Department ID	✓
Reference 1	✓
Major Description	✓
Minor Description	✓
Alpha From	✓
Alpha To	✓
From Date	✓
To Date	✓
Create Date	✓
Event Date	✓

Key Identifier

Customer Box Number

Default

JSRC2

RC2M

Action

Action

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

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

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

Editing a Custom Box Template

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Manage Box Templates Help

Box templates drive data entry when a user creates a box; templates control which fields are required and enabled. Assign box templates to customers. Customers not using a custom box template are automatically assigned to the default template.

[Create Box Template](#) Reset View

Customer	Action
<input type="text" value="Type here then click filter"/>	Filter
Default: ABC, JARR, MARR, MCARR, MCCF1, MCSCF, MFAX2, RC2M1, RC2M2, RC2M3, RC2M4, RC2M6, RC2M7, RC2M8, RC2M9, RC2MA, RC2MB, RC2S9	View
JSRC2	Action
RC2M5	Action

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

Editing a Custom Box Template

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Management Supply Lists

> Management Box Templates

Management Addresses

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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.

Edit Box Template: RC2M5

BOX FIELDS HISTORY

Determine which fields display and which fields are required when users create a box for this customer.

Key Identifier
Customer Box Number

Field Name	Enabled	Required
SKP Barcode	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Box Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Department ID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Reference 1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Major Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Minor Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Alpha From	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Alpha To	<input type="checkbox"/>	<input type="checkbox"/>
From Date	<input type="checkbox"/>	<input type="checkbox"/>
To Date	<input type="checkbox"/>	<input type="checkbox"/>
Create Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Event Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Long Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Destruction Indicator	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Destruction Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Save Cancel

Removing a Custom Box Template

Administration << Manage Box Templates ? Help

Box templates drive data entry when a user creates a box; templates control which fields are required and enabled. Assign box templates to customers. Customers not using a custom box template are automatically assigned to the default template.

Create Box Template Reset View

Customer	Action
<input type="text" value="Type here then click filter"/>	<input type="button" value="Filter"/>
Default: ABC, JARR, MARR, MCARR, MCCF1, MCSCF, MFAX2, RC2M1, RC2M2, RC2M3, RC2M4, RC2M6, RC2M7, RC2M8, RC2M9, RC2MA, RC2MB, RC2S9	<input type="button" value="View"/>
JSRC2	<input type="button" value="Action"/>
RC2M5	<input type="button" value="Action"/>

1 Click the Action dropdown. Sselect Remove.

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Manage Box Templates

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Create Box Template

Reset View

Customer

Type here then click filter

Filter

Default: ABC, JARR, MARR, MCARR, MCCF1, MCSCF, MFAX2, RC2M1, RC2M2, RC2M3, RC2M4, RC2M6, RC2M7, RC2M8, RC2M9, RC2MA, RC2MB, RC2S9

JSRC2

RC2M5

Remove Box Template

Close X

Are you sure you want to remove the box template RC2M5?

Remove

Cancel

2

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

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