

# End-to-End Box Creation with Site Validation

IRON MOUNTAIN CONNECT™ RECORDS MANAGEMENT



# Table of Contents

Section	Page
Overview.....	3
Choose the Box Label.....	4
Log In to Iron Mountain Connect Records Management.....	5
Create the Box.....	6
Place the Pickup Order.....	10
Review Pickup Order Items.....	11
Review Pickup Order Details.....	12
Finalize the Pickup Order.....	13
Additional Resources.....	14

## Overview: End-to-End Box Creation

All of the steps required to use Iron Mountain Connect Records Management to prep and create a box for pickup. Using Iron Mountain's electronic system has many advantages:

- Metadata entry is quick, simple and secure
- Eliminates paper transmittal forms
- No need to contract with Iron Mountain for data entry

Use this guide to learn how to:

- Choose the box label
- Use Iron Mountain Connect Records Management to:
  - Create the box record and enter its metadata
  - Place a pickup order for the box

# Choose the Box Label

1

Fill the box and choose the appropriate label. Iron Mountain uses Radio Frequency ID (RFID) labels.

## Built-in RFID Label



Choose RFID-ready boxes that include a built-in RFID barcode label and checkboxes for use if box content needs to be:

- Listed
- Imaged

## RFID Blue Label: Standard



Choose RFID blue labels to have your boxes sent directly to the shelves for storage.

## RFID Green Label: Data Entry



Choose RFID green labels to have your boxes individually listed and stored based on the file and box label information.

## RFID Orange Label: Imaging



Choose RFID orange labels to have your boxes sent to a Document Imaging Center to be imaged for electronic retrieval.

# Log In to Iron Mountain Connect Records Management

The screenshot shows the Iron Mountain Connect web application interface. At the top, there is a navigation bar with the logo, user name 'Admin8 Admin8', and links for 'PROFILE', 'ENGLISH (CANADA)', 'SUPPORT', and 'LOG OUT'. Below this is a secondary navigation bar with 'HOME', 'PROFILE', and 'RESOURCES'. The main content area is divided into several sections: 'My Quick Links' with links to 'Records Management', 'My Profile', 'Resources', and 'Pay Bill'; 'Resources' with contact information for support; 'Records Center' with a 'REQUEST' form; 'System Notifications' with a message about inactive accounts; and 'What's New' with updates on search functionality and document imaging solutions. An orange callout box with a blue circle containing the number '2' points to the 'Records Management' link in the 'My Quick Links' section. The callout box contains the following text:

Log in to the Iron Mountain Connect homepage and select Iron Mountain Connect Records Management.

Use Iron Mountain Connect Records Management to electronically create the box and enter it's metadata, eliminating the paper transmittal sheet.

# Create the Box

Pickups, Add Records

Pickup List (Add Records) Help Pickups (0)

Add and edit detailed information for records and select items to be picked up and stored at Iron Mountain. To place a vault services or file-only order, click the Pickup Cart to move to the Pickup Order Cart Items screen.

[Add Box](#) [Add File](#) [Refile Box](#)

Select Customer

Reset View [Export](#)

	Record	SKP Barcode	Customer	Division	Department	Description	Status	Action
<input type="checkbox"/>	All		Type here then click fi	Type here then click fi	Type here then click fi	Type here then click fi	All	<a href="#">Filter</a>
<input type="checkbox"/>	New Box		ABC [ABC-FOR RC	Customer Not	MASTER DEPARTMENT	MIN1	New Box	<a href="#">Add to Cart</a> <a href="#">Action</a>
<input type="checkbox"/>	New Box				MASTER DEPARTMENT		New Box	<a href="#">Add to Cart</a> <a href="#">Action</a>
<input type="checkbox"/>	New Box				MASTER DEPARTMENT		New Box	<a href="#">Add to Cart</a> <a href="#">Action</a>
<input type="checkbox"/>	New Box	ABC55H733	ABC [ABC-FOR RC	Customer Not	MASTER DEPARTMENT	CALC PRO LDO NOT	New Box	<a href="#">Add to Cart</a> <a href="#">Action</a>
<input type="checkbox"/>	New Box				MASTER DEPARTMENT		New Box	<a href="#">Add to Cart</a> <a href="#">Action</a>

Page 1 of 2 Per Page: 25

Displaying 1 - 25 of 43

**3** Select Pickups, Add Records.

**4** Select Pickup List (Add Records). The Pickup List shows boxes that have been created but not yet sent to Iron Mountain for storage.

# Create the Box

5

Click Add Box.

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

Add and edit detailed information for records you will be storing at Iron Mountain. To place a vault services or file-only order, click the Pickup Cart to move to the Pickup Order Cart Item screen.

Add Box Add File Refile Box

Action Select Customer Reset View Export

Record Type	SKP Barcode	Customer	Division	Department	Description	Status	Action
All	Type here then click fi	Type here then click fi	Type here then click fi	Type here then click fi	Type here then click fi	All	Filter
New Box	ABC55H73	ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]	Customer Not Division-Enabled	MASTER DEPARTMENT	MIN1	New Box	Add to Cart Action
New Box	ABC55H731	ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]	Customer Not Division-Enabled	MASTER DEPARTMENT		New Box	Add to Cart Action
New Box	ABC55H732	ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]	Customer Not Division-Enabled	MASTER DEPARTMENT		New Box	Add to Cart Action
New Box	ABC55H733	ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]	Customer Not Division-Enabled	MASTER DEPARTMENT		New Box	Add to Cart Action
New Box	ABC55H734	ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]	Customer Not Division-Enabled	MASTER DEPARTMENT		New Box	Add to Cart Action

- Search, Retrieve
- Pickups, Add Records**
- Bulk Upload
- Order Supplies
- Administration
- Track Orders

# Create the Box

IRON MOUNTAIN CONNECT

RECORDS MANAGEMENT

Welcome admin4 USA SUPPORT LOG OUT

Check out Pickups (0)

Reset View Export

Choose New Box Type to Add to Pickup List

	<b>Standard Carton</b> 15"L x 12"W x 10" H (1.2 cubic feet)
	<b>Check Carton</b> 24"L x 9"W x 10" H
	<b>Letter Transfer Carton</b> 24"L x 12"W x 10" H (2.4 cubic feet)
	<b>Legal Transfer Carton</b> 24"L x 15"W x 10" H (3.6 cubic feet)
	<b>X-Ray Carton</b> 15"L x 6.25"W x 10" H (1.8 cubic feet)
	<b>Small Planner Carton</b> 4"L x 4"W x 10" H
	<b>Medium Plan Carton</b> 43" L x 6"W x 6" H
	<b>Large Plan Carton</b> 44"L x 9.25" W x 9.25"H

Cancel

6 Select the box type.

Search, Retrieve

Pickups, Add Records

Order Supplies

Administration

Track Orders



# Create the Box

7

Enter box metadata that will be used for searching and tracking this box. Complete all required fields (marked with \*).

Complete optional fields as appropriate. Optional fields make it easier to locate and manage your records.

8

Click Save Box & Close to save the box metadata and return to the Pickup List.

New Box [Close X]

BOX DETAILS

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

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

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

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

Reference #1 (lock) From Date (lock)

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

\*Minor Description (lock) Payroll Create Date (lock)

Action Indicator (lock) Destruction Date (lock)

Select Select

Save Box & Close Save & Add Another Box Cancel

i

Use Customize Layout to change the field labels and layout during the current data entry session.

Your system administrator controls the default fields and field labels on this screen.

i

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

# Place the Pickup Order

IRON MOUNTAIN® CONNECT

Welcome rc2jen USA SUPPORT ▾ LOG OUT

RECORDS MANAGEMENT

Pickups, Add Records

Pickup List (Add Records) Help Pickups (0)

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

Add Box Add File Refile Box

Action Select Customer CDRPT [RPT CUSTOMER FOR RCC PROJECT]

Reset View Export

	<input type="checkbox"/>	Record Type	SKP Barcode	Customer	Division	Department	Description	Status	Action
		All	Type here then click	Type here then click	Type here then click	Type here then click	Type here then click	All	
<input type="checkbox"/>		New Box	98765473	CDRPT [RPT CUSTOMER FOR RCC PROJECT]	Customer Not Division-Enabled	MASTER DEPARTMENT		New Box	

9

The box that you created displays on the pickup list. Follow the steps below to add it to the cart and begin the process of placing a pickup order.

- Select the same customer that you entered on the box from the Select Customer dropdown. This enables the cart.
- Click the Add to Cart button to the right of the box you created.
- Click the Pickups button to open the pickup order wizard, which steps you through the order process.

Search, Retrieve

Pickups, Add Records

Bulk Upload

Order Supplies

Administration

Track Orders

Page 1 of 1

Displaying 1 - 1 of 1

IRON MOUNTAIN®

# Review Pickup Order Items

IRON MOUNTAIN® CONNECT Welcome rc2tom USA SUPPORT ▾ LOG OUT

RECORDS MANAGEMENT

Cart << Pickup Cart ? Help

>Retrievals (3)  
>Supplies (0)  
>Pickups (2)

**Cart : (2) Items** Pickup Details Order Complete

Review pickup order items and specify internal billing information. Update order as necessary.

Empty Cart Add More Records Next >

Customer : JSRC2 [SRVC CF,BC=B,RMT=5] Line Items (2)

\*Bill To Division: [DIVISION TWO] \*PO Number: JSRC2\*\*

\*Bill To Department: **10**

Instructions:

Standard Carton	Remove
Dimensions: 15"L x 10"W x 10"H	Number of Returns: 12 Update
Instructions: Deliver to Betty Smith (610) 772-1228 x133	
Standard Carton	Status: New Box(es) Remove

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

Review your pickup order and specify any required information (marked with a \*), then click Next to move to the Pickup Order Details step in the wizard and enter shipping information.

# Review Pickup Order Details

11

Verify the pickup address and edit the contact as necessary. Click the [>Change Address](#) link to select or create a new address.

12

Verify your shipping priority and carrier.

13

Finalize your order. Your records will be picked and a confirmation will be emailed.

IRON MOUNTAIN® CONNECT

Welcome rc2tom USA SUPPORT LOG OUT

Cart >Retrieve >Supplies >Pickup

Pickup Details

< Back to Cart Add More Records Place Your Order

Pickup Address

RC2M1 [RC2M1]

35 Main Street

4900 SEMINARY ROAD

Address Line 3

Floor: Floor

ALEXANDRIA, VA 22311

> Change Address

Pickup Contact

RC2M1 Contact

Contact Phone

> Use My Contact Information

Shipping Priority

Normal 10/13/2015 5:00 PM EDT

Scheduled by 5:00 PM on mm/dd/yyyy

Carrier

Iron Mountain

Customer Drop Off

Third Party

Email Confirmation(s)

Primary

Jane.Smith@ironmountain.com

Additional Email

Additional Email

Order Instructions

Enter text

60 characters remaining

> Add Instructions

Customer: JSRC2 [SRVC CF,BC=B,RMT=5]

Bill To Division: DIVISION TWO

Bill To Department: DIV TWO, INS 2 FORMAT

Line Items (2)

PO Number: JSRC2\*\*

100%

i

Enter the email address of user(s) who will receive the order confirmation. The primary contact receives all order-related emails. Non-primary contacts receive confirmation emails only.

i

Enter any instructions that are specific to this overall order.

# Finalize the Pickup Order

The screenshot displays the 'Pickup Cart' interface in the Iron Mountain Connect system. The top navigation bar includes the logo, 'RECORDS MANAGEMENT', and user information: 'Welcome admin8', 'USA', 'SUPPORT', and 'LOG OUT'. The main content area shows a confirmation message: 'Thank you. Your order has been submitted.' with a green checkmark icon. Below this, it states 'An email confirmation will be sent to RC2Beta@ironmountain.com'. A 'Delivery Address' is listed: '4 Main Street, 4421 WATERFRONT, Floor: 3RD, GLEN ALLEN VA'. A blue button in the top right corner says '< Start a New Pickup Order'. Below the message is a table with one row for order 'RC258 [RC258]'. The table has columns for 'Order Number' (155471373), 'Order Type' (Pickup), and 'Item Count' ((1) Item), with a 'View Order' button to the right. A sidebar on the left contains navigation links: 'Search, Retrieve', 'Pickups, Add Records', 'Order Supplies', 'Administration', and 'Track Orders'. Three yellow callout boxes with information icons provide instructions: one points to the email address, one to the 'Start a New Pickup Order' button, and one to the order number and 'View Order' button.

Cart << Pickup Cart

>Retrievals (1)  
>Supplies (0)  
>Pickups (0)

Pickup Items Pickup Details Order Complete

Thank you. Your order has been submitted.  
An email confirmation will be sent to RC2Beta@ironmountain.com

Delivery Address: 4 Main Street  
4421 WATERFRONT  
Floor: 3RD  
GLEN ALLEN VA

< Start a New Pickup Order

RC258 [RC258]

Order Number	Order Type	Item Count	View Order
155471373	Pickup	(1) Item	View Order

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


The user who will receive email confirmation for this order.

Return to the Quick Pickup Order screen and begin a new order.

Click the blue order number or the View Order button to open the Order Information and Order History tab screens where you can review and cancel your order. Refer to [Tracking Your Orders](#) for additional information.

# Additional Resources

Iron Mountain has additional training resources to help you:

- **ONLINE HELP** is available from each screen in the application by clicking the help icon .
- **HOW TO** documents are available from the Iron Mountain Connect homepage. Simply click **Quick Links | Resources | Training**.

For more information on creating boxes, refer to these How To documents:

- Creating a New Box
- Placing a Pickup Order
- Tracking Orders