



End-to-End Box Creation

IRON MOUNTAIN CONNECT™ RECORDS MANAGEMENT



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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 the number '2' is overlaid on 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)

> Quick Pickup Order
Specify the number of records to be stored at Iron Mountain

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

[Add Box](#) [Add File](#) [Go To Quick Pickup Order](#) [Reset View](#) [Export](#)

Record Type	SKP Barcode	Customer	Division	Department	Description	Status	Action
All	Type here then click filter	Type here then click filter	Type here then click filter	Type here then click filter	Type here then click filter	All	Filter
New Box		RC2C7 [RC2 TEST CUSTOMER #7]	34 [ETY]	MASTER DEPARTMENT		New Box	Action
New Box		RC2C5 [RECORD CENTER 2]	201507 [JULY DEPLOYMENT TEST DIVISION]	MASTER DEPARTMENT		New Box	Action
New Box		RC2C5 [RECORD CENTER 2]	346 [TEST1]	MASTER DEPARTMENT		New Box	Action
New Box				MASTER DEPARTMENT		New Box	Action

Support

Search, Retrieve

Pickups, Add Records

Bulk Upload

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

3 Select Pickups, Add Records.

Create the Box

Pickups, Add Records

Pickup List (Add Records) Help Pickups (0)

> **Quick Pickup Order**
Specify the number of records to be stored at Iron Mountain

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

[Add Box](#) [Add File](#) [Go To Quick Pickup Order](#) [Reset View](#) [Export](#)

Record Type	SKP Barcode	Customer	Division	Department	Description	Status	Action
All	Type here then click filter	Type here then click filter	Type here then click filter	Type here then click filter	Type here then click filter	All	Filter
New Box		RC2C7 [RC2 TEST #7]	34 [ETY]	MASTER DEPARTMENT		New Box	Action
New Box		CORD	201507 [JULY DEPLOYMENT TEST DIVISION]	MASTER DEPARTMENT		New Box	Action
New Box		RC2C5 [RECORD CENTER 2]	346 [TEST1]	MASTER DEPARTMENT		New Box	Action
New Box		RC2C5 [RECORD CENTER 2]	346 [TEST1]	MASTER DEPARTMENT		New Box	Action

5 Click Add Box.

Support
Search, Retrieve
Pickups, Add Records
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Create the Box

The screenshot displays the Iron Mountain Connect web application interface. At the top, the logo 'IRON MOUNTAIN CONNECT' is visible on the left, and user information 'Welcome admin4', 'USA', 'SUPPORT', and 'LOG OUT' are on the right. The main navigation bar includes 'RECORDS MANAGEMENT' and 'Pickups, Add Records'. A central 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	

An orange callout bubble with the number '6' and the text 'Select the box type.' points to the list of box types. The dialog box also features a 'Cancel' button at the bottom.

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.

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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

Pickups, Add Records

> Quick Pickup Order
Specify the number of records to be stored at Iron Mountain

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

9 The box that you created displays on the pickup list.
Click Quick Pickup Order to schedule pickup for the boxes that you created.

Record Type

All

Status	Action
New Box	Action
New Box	Action
New Box	Action
New Box	Action
New Box	Action
New Box	Action

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Place the Pickup Order

Pickups, Add Records

Quick Pickup







Help Pickups (2)

> Quick Pickup Order
Specify the number of records to be stored at Iron Mountain

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

Select Customer:
JSRC2 [SRVC CF,BC=B,RMT=5] Add to Cart
Select:
ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]
JSRC2 [SRVC CF,BC=B,RMT=5]
RC2M1 [RC2M1]

Select the customer, and specify the number of new and previously stored (refile) records that you will be storing at Iron Mountain. Once complete, checkout to schedule pickup.

	Dimensions	New	Refile
 Individual Files		<input type="text"/>	<input type="text"/>
 Standard Carton		<input type="text"/>	<input type="text"/>
 Check Carton	24"L x 9"W x 10" H	<input type="text"/>	<input type="text"/>
 Letter Transfer Carton	24"L x 12"W x 10" H	<input type="text"/>	<input type="text"/>
 Legal Transfer Carton	24"L x 15"W x 10" H	<input type="text"/>	<input type="text"/>
 X-Ray Carton	15"L x 6.25"W x 10" H	<input type="text"/>	<input type="text"/>

10

Select the customer you are entering this pickup order for.

Search, Retrieve

Pickups, Add Records

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100%

Place the Pickup Order

Pickups, Add Records

> Quick Pickup Order
Specify the number of records to be stored at Iron Mountain

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

Search, Retrieve

Pickups, Add Records

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Track Orders

Quick Pickup

Select the customer, and specify the number of new and previously stored (refile) records that you will be storing at Iron Mountain. **13** Complete checkout to schedule pickup.

Select Customer: JSRC2 [SRVC CF,BC=B,RMT=5] **Add to Cart**

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

Carton/File Type	Dimensions	New	Refile
 Individual Files		<input type="text"/>	<input type="text"/>
 Standard Carton		<input type="text"/>	<input type="text"/>
 Check Carton	24"L x 9"W x 10" H	<input type="text"/>	<input type="text"/>
 Letter Transfer Carton		<input type="text" value="12"/>	<input type="text"/>
 Legal Transfer Carton	24"L x 15"W x 10" H	<input type="text" value="18"/>	<input type="text"/>
 X-Ray Carton	15"L x 6.25"W x 10" H	<input type="text"/>	<input type="text"/>


12 Add the box(es) to your cart.

11 Enter the number of each type of new box that you need to have picked up.

Click the Pickups button to open the pickup order wizard, which steps you through the order process.

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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: [SRVC DIVISION TWO] *PO Number: JSRC2**

*Bill To Department: []

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

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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

15

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

16

Verify your shipping priority and carrier.

17

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

The screenshot shows the 'Review Pickup Order Details' page in the Iron Mountain Connect system. The page is divided into several sections: Pickup Address, Shipping Priority, Carrier, Email Confirmation(s), and Order Instructions. A navigation bar at the top includes 'Welcome rc2tom', 'USA', 'SUPPORT', and 'LOG OUT'. A sidebar on the left contains links for 'Search, Retrieve', 'Pickups, Add Records', 'Order Supplies', 'Administration', and 'Track Orders'. The main content area has a 'Pickup Address' section with fields for 'RC2M1 [RC2M1]', '35 Main Street', '4900 SEMINARY ROAD', 'Address Line 3', 'Floor: Floor', and 'ALEXANDRIA, VA 22311'. Below this is a '> Change Address' link and a 'Pickup Contact' section with fields for 'RC2M1 Contact' and 'Contact Phone', along with a '> Use My Contact Information' link. The 'Shipping Priority' section has radio buttons for 'Normal 10/13/2015 5:00 PM EDT' (selected) and 'Scheduled by 5:00 PM on [mm/dd/yyyy]'. The 'Carrier' section has radio buttons for 'Iron Mountain' (selected), 'Customer Drop Off', and 'Third Party'. The 'Email Confirmation(s)' section has a 'Primary' section with a field for 'Jane.Smith@ironmountain.com' (selected) and two 'Additional Email' fields. The 'Order Instructions' section has a text area for 'Enter text' and a '60 characters remaining' indicator. At the bottom, there is a 'Customer: JSRC2 [SRVC CF,BC=B,RMT=5]' section with 'Bill To Division: DIVISION TWO' and 'Bill To Department: DIV TWO, INS 2 FORMAT'. A 'Line Items (2)' section is partially visible at the bottom right, showing 'PO Number: JSRC2**'. Callouts 15, 16, and 17 are orange speech bubbles pointing to the address, shipping priority, and 'Place Your Order' button respectively. Callouts 18 and 19 are yellow speech bubbles pointing to the 'Additional Email' and 'Order Instructions' fields respectively.

IRON MOUNTAIN[®] CONNECT

Welcome rc2tom USA SUPPORT LOG OUT

Cart

>Retrieve

>Suppl

>Pickup

< 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 Inter [unclear] Address

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**

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). A 'View Order' button is located to the right of the table. Three yellow callout boxes with information icons provide instructions: one points to the email address, another to the 'Start a New Pickup Order' button, and a third points 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

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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