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

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.

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Log In to Iron Mountain Connect Records Management

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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

Create the Box

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 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

Bulk Upload

Order Supplies

Administration

Track Orders

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Create the Box

Create the Box

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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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New Box — ❓ Close ✕

BOX DETAILS   **FILES**

...detailed information about this box. Lock fields to retain and reuse the data that you entered, similar ...ng a template. *Required field

>Customize Layout

...omer	Division	*Box Department (lock)
C4 [RECORD CENTER 2 TEST CUSTC ▼]	Customer Not Division-Enabled	RC2DEPT [RECORD CENTER 2 TEST DEP

Barcode (lock) | Alpha From (lock) | Event Date (lock)

...omer Box Number (lock) | Alpha To (lock) | Long Description (lock)
...-1818 | | Benefits claims Sept 2017 North America

...ence 1 (lock) | From Date (lock)

...r Description (lock) | To Date (lock)
...an Resources |

...r Description (lock) | Create Date (lock)

*Record Code | Hold Code
...O ▤ | Select

...uction Eligibility Period
...anent

Save & Close | Save & Add | Add Files | Cancel

Displaying 1 - 4 of 4

❓ Help   🛒 Pickups (0)   ▼

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.

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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.

Support

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Pickup List (Add Records)   ? Help   🛒 **Pickups (0)** ▼

Add and edit detailed informati... records you will be storing at Iron Mountain.

Add File   **9**   Reset View   📊 Export

Record Type				Status	Action
All	Type h...		...en click filt	All	**Filter**
📦 New Box				**New Box**	Action ▼
📦 New Box		DEPLOYMENT TEST DIVISION]	DEPARTMENT	**New Box**	Action ▼
📦 New Box	RC2C4 [RECORD CENTER 2 TEST CUSTOMER]	Customer Not Division-Enabled	RC2DEPT [RECORD CENTER 2 TEST DEPARTMENT]	**New Box**	Action ▼
📦 New Box	RC2C5 [RECORD CENTER 2]	346 [TEST1]	MASTER DEPARTMENT	**New Box**	Action ▼
📦 New Box	8008			New Box	⚠ Access Changed

The box that you created displays on the pickup list.

Click Quick Pickup Order to schedule pickup for the boxes that you created.

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Place the Pickup Order

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 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.

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]

		Dimensions	New	Refile
	Individual Files			
	Standard Carton			
	Check Carton	24"L x 9"W x 10" H		
	Letter Transfer Carton	24"L x 12"W x 10" H		
	Legal Transfer Carton	24"L x 15"W x 10" H		
	X-Ray Carton	15"L x 6.25"W x 10" H		

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Select the customer you are entering this pickup order for.

Search, Retrieve

Pickups, Add Records

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Track Orders

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Place the Pickup Order

Review Pickup Order Items

Welcome rc2tom   USA   SUPPORT · LOG OUT

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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:

Instructions:

14

Standard Carton   Remove

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.

Dimensions: 15"L x   Number of 12   Update
                                             Returns:

uctions: Deliver to Betty Smith (610) 772-1228 x133

Search, Retrieve

Pickups, Add Records

Order Supplies

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Standard Carton   Status: New Box(es)   Remove

Track Orders

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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.

Welcome rc2tom USA SUPPORT ▾ LOG OUT

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Cart
>Retrie
>Suppl
>Picku

tent of this order.

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 Inter   g Address

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.

Search, Retrieve

Pickups, Add Records

Order Supplies

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Track Orders

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

Line Items (2)

Bill To Division: DIVISION TWO

Bill To Department: DIV TWO, INS 2 FORMAT

PO Number: JSRC2**

🔍 100% ▾

Finalize the Pickup Order

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

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