



High-Level Functional Overview

IRON MOUNTAIN CONNECT™ RECORDS MANAGEMENT

T2.5.1 11.15

In This Document

Use this guide to learn:

- How to access Iron Mountain Connect Records Management
- Where to download How To documents and other training materials
- About the many new features and redesigned modules included in Iron Mountain Connect Records Management

Accessing Iron Mountain Connect Records Management

Iron Mountain Connect's home page is your single-point entry into all of Iron Mountain's business applications, including our Records Management system.

1. Access Iron Mountain Connect via www.ironmountainconnect.com.
2. Type your Username and Password to open the home page.
3. Use one of the three access points to Iron Mountain Connect Records Management:
 - Select **Records Management** from the My Quick Links navigation bar
 - Click the **Record Center** title in the center portal.
 - Enter search criteria in the Find My Box/File field in the center portal and click **Go**.

The screenshot displays the Iron Mountain Connect user interface. At the top, there is a navigation bar with the logo and user information. Below this, a 'My Quick Links' sidebar on the left contains a link to 'Records Management'. The main content area features a 'Record Center' section with a search input field and a 'Go' button. A 'SCHEDULED REPORT' section is also visible. On the right, there are system notifications and news items. Three yellow callout boxes with information icons point to the 'Records Management' link, the 'Record Center' title, and the search input field, providing instructions on how to access the system.

Click to access.

Click to access.

Enter search criteria and click Go to access.

Download Training Materials & Access System Notifications

In addition to providing entry into Iron Mountain Connect Records Management, the Iron Mountain Connect home page provides access to key information, including:

- Training resources and **How To documents** that walk you through workflows step-by-step
- System notifications
- Announcements about the latest features and enhancements

Quickly and easily navigate throughout Iron Mountain Connect. Only functional areas you have access to are displayed.

Tab screens give you quick access to Iron Mountain Connect's business applications and functionality.

Stay apprised of scheduled system maintenance.

Learn about new features and system enhancements.

Download pertinent industry articles, papers and HOW TO documents that walk you through Iron Mountain Connect Records Management workflows.

Your administrator controls the functionality that you have access to.

The screenshot shows the Iron Mountain Connect home page with several callouts pointing to specific features. The page layout includes a top navigation bar with 'HOME', 'PROFILE', and 'RESOURCES' tabs. Below this is a 'My Quick Links' section with links for 'Records Management', 'My Profile', 'Resources', and 'Pay Bill'. A 'Resources' section is also visible, featuring a 'View Messages' button and contact information for 'By Phone' (24 hours/day, 365 days/year) and 'General Inquiries' (800-934-3453 (US) or 800-327-8345 (Canada)). The main content area is divided into three columns: 'Record Center' (with a search box for 'Find my boxfile: smith'), 'Reports' (with a 'REQUEST A REPORT' button and a 'SCHEDULED REPORTS' section), and 'System Notifications' (with a 'Removal of Inactive Accounts' announcement dated March 13th, 2014). A 'What's New' section at the bottom right highlights 'Enhanced Search Functionality' and 'Document Imaging Solutions'.

New Features & Functionality: Workflows

Workflows throughout the application have been updated:

- Searching for Records
- Retrieving Records
- Placing a Pickup Order
- Placing a Supply Order
- Tracking Orders
- Creating a New Box
- Creating a New File
- Creating and Managing Supply Lists
- Creating and Managing Shipping Addresses
- Creating a Custom Box Template
- Creating a Custom File Template

New Features & Functionality: Overview

Iron Mountain Connect Records Management was designed from the best features of Record Center with cutting edge additions and enhancements:

- Robust search engine
- Electronic shopping cart
- Order wizards that simplify and speed your work
- Custom supply lists
- Centralized address functionality
- Customizable screen displays with sorting, filtering and paging
- Optimized workflows for ordering pickups, retrieving records, and ordering supplies
- Custom box and file templates that control data entry screens
- Enhanced order tracking
- Context-sensitive online help

New Features & Functionality: Intuitive Screen Design

The screenshot displays the Iron Mountain Connect Records Management interface. The top navigation bar includes the logo, user name 'Welcome rc2jen', location 'USA', and links for 'SUPPORT' and 'LOG OUT'. The main content area shows a search results page with 25 results. A left sidebar contains filters for Record Type, Customer, Division, Department, Status, and File Group. A bottom sidebar lists navigation options: Search, Retrieve, Pickups, Add Records, Order Supplies, Administration, and Track Orders. A shopping cart icon in the top right corner shows 4 items. Five yellow callout boxes with information icons point to specific features: 1. Search area: 'Expandable/collapsible search area allows you to view your search results in full-screen mode.' 2. Grid-style displays: 'Grid-style displays are user-friendly and easy to read.' 3. Search functionality: 'Search functionality consistently located at the left side of the screens.' 4. Context-sensitive online help: 'Context-sensitive online help for quick answers to all of your questions.' 5. Shopping cart: 'Your shopping cart is located in the upper right corner of your screen for ease of access.'

Item Type	Item ID	Customer	Division	Department	Description	Status	Location	Action
BOX	12100011	RC2M8 [RC2M8]	MASTER DIVISION	35 [ABC PHARMACY/PRESCRIP SHOP]	12110011	At Iron Mountain	Add to Cart	
BOX	12100015	RC2M8 [RC2M8]	MASTER DIVISION	45 [ABC PHARMACY/COSMETIC BOUTIQUE]	12100015	At Iron Mountain	Add to Cart	
BOX	12100014	RC2M8 [RC2M8]	MASTER DIVISION	ABC PHARMACY/CARDS & GIFTS]	12100014	At Iron Mountain	Remove	
BOX	12100013	RC2M8 [RC2M8]	MASTER DIVISION	55 [ABC PHARMACY/CARDS & GIFTS]	12100013	At Iron Mountain	Remove	

New Features & Functionality: Easier Navigation

The screenshot displays the Iron Mountain Connect Records Management interface. The top navigation bar includes the logo, user information (Welcome rc2jen), and links for USA, SUPPORT, and LOG OUT. The main content area shows a search results table with columns for Item Type, SKP Barcode, Customer, Division, Department, Record Code, Customer Box Number, Status, and Action. A left-side navigation bar contains links for Search, Retrieve, Pickups, Add Records, Order Supplies, Administration, and Track Orders. Three callout boxes provide instructions: one points to the left-side navigation bar, another points to the pagination controls (Page 1 of 1, Per Page: 100), and a third points to the top right corner where the total number of results (25) and the number of results displayed (4) are shown.

Use the left-side navigation bar to move to the different functional areas quickly and easily. Access is at your fingertips.

Quickly page through your search results.

Change the number of results displayed on screen.

View the total number of results and the number of results displayed at a glance.

Item Type	SKP Barcode	Customer	Division	Department	Record Code	Customer Box Number	Status	Action
BOX	12100011	RC2M8 [RC2M8]	MASTER DIVISION	M01 [M01]		12100011	At Iron Mountain	Add to Cart
BOX	12100012	RC2M8 [RC2M8]	MASTER DIVISION	MASTER DEPARTMENT		12100012	At Iron Mountain	Add to Cart
BOX	12100013	RC2M8 [RC2M8]	MASTER DIVISION	55 [ABC PHARMACY/CARDS & GIFTS]	GLOB	12100013	At Iron Mountain	Remove
BOX	12100014	RC2M8 [RC2M8]	MASTER DIVISION	55 [ABC PHARMACY/CARDS & GIFTS]	GLOB	12100014	At Iron Mountain	Remove
BOX	12100015	RC2M8 [RC2M8]	MASTER DIVISION	45 [ABC PHARMACY/COSMETIK BOUTIQUE]	GLOB	12100015	At Iron Mountain	Add to Cart

New Features & Functionality: Track Orders by Date Range

IRON MOUNTAIN CONNECT

Welcome rc2jen USA SUPPORT LOG OUT

RECORDS MANAGEMENT

Track Orders 138 Search Results

Enter criteria in the Left-Side Search bar to locate orders. Orders can have the following statuses: Submitted for Processing, Cancelled, Processing Completed.

Set filters and enter search criteria to track orders. Search by order number, customer, date or date range, order type and requestor.

Order Number	Requested By	Order Type	Priority	Status	Customer
155451691		Pickup	Normal	Processing Completed	JSRC2 [SRVC CF,BC=B,RMT=5]
155453209	07/23/2015 rc2raghu	Retrieval	Rush	Cancelled	JSRC2 [SRVC CF,BC=B,RMT=5]
155454498	07/24/2015 rc2tom	Retrieval	Rush	Submitted for Processing	JSRC2 [SRVC CF,BC=B,RMT=5]
155457707	07/28/2015 squinn	Pickup	Normal	Submitted for Processing	JSRC2 [SRVC CF,BC=B,RMT=5]
155460286	07/30/2015 rc2ashok	Supplies	Rush	Submitted for Processing	JSRC2 [SRVC CF,BC=B,RMT=5]
155464063	08/05/2015 rc2benoy	Retrieval	Rush	Submitted for Processing	JSRC2 [SRVC CF,BC=B,RMT=5]
155464064	08/05/2015 rc2benoy	Retrieval	Rush	Submitted for Processing	JSRC2 [SRVC CF,BC=B,RMT=5]
155464847	08/06/2015 rc2raghu	Retrieval	Rush	Submitted for Processing	JSRC2 [SRVC CF,BC=B,RMT=5]
155464906	08/06/2015 rc2tara	Retrieval	Rush	Submitted for Processing	JSRC2 [SRVC CF,BC=B,RMT=5]
155465619	08/07/2015 rc2raghu	Retrieval	Scheduled	Submitted for Processing	JSRC2 [SRVC CF,BC=B,RMT=5]
155465621	08/07/2015 rc2raghu	Retrieval	Scheduled	Submitted for Processing	JSRC2 [SRVC CF,BC=B,RMT=5]

Search, Retrieve

Pickups, Add Records

Order Supplies

Administration

Track Orders

Page 1 of 3

Displaying 1 - 50 of 138

100%

New Features & Functionality: Three-Step Checkout Wizard

Cart Retrieval Cart

Cart: (4) Items Retrieval Details Order Complete

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

Select All Deselect All Empty Cart Add More Records Next >

Customer: ABC [ABC-FOR RC CALC PROJ DO NOT CH... Line Items (2)

*Bill To Department: DEPT A [ACCOUNTING] Chargeback: MedRcd38 Apply to All

Instructions: ONLY DEL/PU BETWEEN 9:30 AM AND 4:00 PM Number: 38-339-2015

asfads Requested for Stackhouse, Jen Change User

Description TWO Requested for Stackhouse, Jen Change User

Chargeback: MedRcd38 Item Instructions: Retrieval Method: Checkout

Customer: RC2M8 [RC2M8] Line Items (2)

Instructions: RC2M8 Apply Chargeback: Apply to All

*PO Number:

12100013 At Iron Mountain Requested for Stackhouse, Jen Change User Chargeback: Item Instructions: Retrieval Method: Checkout

12100014 At Iron Mountain Requested for Stackhouse, Jen Change User Chargeback: Item Instructions: Retrieval Method: Checkout

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

100%

Order items are processed in a systematic three-step method, regardless of order type. Screens and workflows are consistent. Use the order tracker bar to gauge your progress at a glance.

New Features & Functionality: Customizable Screen Display

Robust filtering capabilities with **built-in sorting**, and **customizable screen displays**

The screenshot displays the Iron Mountain Connect Records Management interface. At the top, there is a navigation bar with the logo, user name 'admin8', and options for 'USA', 'SUPPORT', and 'LOG OUT'. Below this is a 'RECORDS MANAGEMENT' section with a 'Pickup List (Add Records)' tab. The main area contains a data table with columns: SKP Box Number, Customer, Division, Department, Customer Box Number, Status, and Action. A 'Filter' button is visible on the right. A 'Columns' dropdown menu is open over the 'Customer' column, showing options for 'Sort Ascending', 'Sort Descending', and 'Columns'. The 'Columns' menu is checked for 'Customer', 'Division', and 'Department'. A 'Filter' button is also visible on the right side of the table.

Sort each column in ascending or descending order.

Drag and drop columns so that the data displays in the order that is most usable for you.

Enter a letter, number or combination to filter the data that will display in the column. Use the wildcard operator (*) for easier filtering.

Change the column widths by stretching and narrowing the column headings.

Customize your view by selecting the columns that will display. Iron Mountain Connect Records Management automatically saves your changes and applies them each time you return to the selection.