# IRON MOUNTAIN®

# **High-Level Functional Overview**

IRON MOUNTAIN CONNECT™ RECORDS MANAGEMENT

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# **In This Document**

Use this guide to learn:

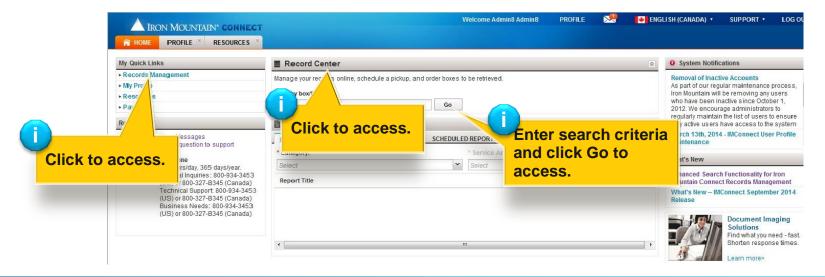
- How to access Iron Mountain Connect Records Management
- Where to download How To documents and other training materials
- About the many new features and redesigned modules included in Iron Mountain Connect Records Management



#### **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 <u>www.ironmountainconnect.com</u>.
- 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.





#### **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		INTAIN' CONNECT		s give you quick access onnect's business appli nality.		I ENGLISH (CANADA) * SUPPORT * LOG 0. Stay appris of schedul				
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Connect. Only	• Resources		Find my box/file:	Go		Iron Mountain will be removing any users who have been inactive since October 1,				
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Connect Records										
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### **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**

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# **New Features & Functionality: Easier Navigation**

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# **New Features & Functionality: Track Orders by Date Range**

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All Requested By	*	155453209	07/23/2015	rc2raghu		Retrieval	Rush	Cancelled	JSRC2 [SRVC CF,BC=B,	,RMT=5]		
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		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]		
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Track Orders		I4 4   Page	1 of 3   ▶ ▶   2						Displaying	g 1 - 50 of	138	



#### **New Features & Functionality: Three-Step Checkout Wizard**

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Cart 🔍	Retrieval Cart			🕑 Help
>Retrievals (4)	₩ Cart: (4) Items	Ore	ler Complete	
>Supplies (0)	Review retrieval order items and specify internal billing			
>Pickups (0)	Select All Deselect All Empty Cart		Add More Records	Next>
	Customer : ABC [ABC-FOR RC CALC PROJ DO NO *Bill To Department: DEPT A [ACCOUNTING Instructions: ONLY DEL/PU BETWEEN 9:	Order items are processed in a systematic three-step method, regardless of order type.		Line Items (2) 🥃
	asdfads     Requested for     Stackhouse,Jen Change User	Screens and workflows are consistent. Use the order tracker bar to gauge your	Remove  More >>    Retrieval Method    Checkout	] 
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	Customer: RC2M8 [RC2M8]			Line Items (2) 📃
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# **New Features & Functionality: Customizable Screen Display**

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

