



Managing Custom Supply Lists

IRON MOUNTAIN CONNECT™ RECORDS MANAGEMENT

T2.5.1 11.15

Creating Custom Supply Lists

Custom supply lists allow you to control the inventory available to your users.

As an administrator, you create supply lists on a customer-by-customer basis. This means that you can apply one standard list to all of the customers in your organization, or apply specific lists based on the needs of a single division or department.

Use this section to learn how to:

- Create a new custom supply list and assign it to a customer, department or division
- View and edit existing custom supply lists
- Remove custom supply lists and use the default supply list

Creating Custom Supply Lists

The screenshot displays the Iron Mountain Connect interface. The top navigation bar includes the logo, 'Welcome rc2jen', 'USA', 'SUPPORT', and 'LOG OUT'. The left sidebar shows a navigation menu with 'Administration' selected. The main content area is titled 'Manage Supply Lists' and contains a 'Create New Supply List' button. A table below shows a 'Customer Supply List' with columns for 'Action' and 'View Supply List'. The table contains three rows, each with a 'View Supply List' and 'Remove' button. The bottom right corner shows 'Displaying 1 - 3 of 3'.

1 Select Administration.
Use the left-side navigation bar to move within the different functional areas in Iron Mountain Connect Records Management.

2 Select Manage Supply Lists to access the Customer ID Supply List screen.

3 Click Create New Supply List.

i Type part of the description and click Filter to quickly filter the supplies that appear on the list.

i Review this customer's supply list.

Creating Custom Supply Lists

Welcome rczjell USA SUPPORT LOG OUT

Admin Manage

Manage Supply Lists

Manage Box Templates

Manage File Templates

Manage Addresses

Lists

Choose Customer(s)

Confirm Summary

Cancel Choose Supplies >

Reset View

Customer	Customer Name	Status	Action
<input type="checkbox"/> MCCF1	BILLABLE CF TEST, BC=6, REMIT=3	Active	<input type="button" value="Filter"/>
<input type="checkbox"/> MFAX2	FAXTRIEVAL REMIT=1, DEPT BILLCODE=4	Active	
<input checked="" type="checkbox"/> RC2M1	RC2M1	Active	
<input checked="" type="checkbox"/> RC2M2	RC2M2	Active	
<input type="checkbox"/> RC2M3	RC2M3	Active	
<input type="checkbox"/> RC2M4	RC2M4	Active	
<input type="checkbox"/> RC2M5	RC2M5	Active	
<input type="checkbox"/> RC2M7	RC2M7	Active	
<input type="checkbox"/> RC2M8	RC2M8	Active	
<input type="checkbox"/> RC2M9	RC2MA	Active	
<input type="checkbox"/> RC2S9	RC2S9	Active	

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Click the multi-select checkbox to select All Customers if you are creating a supply list that applies to all customers.

Click Choose Supplies to open the Supply Selection screen and select supplies to add to this list.

Select the Customer (s) that will use this supply list.

You are only able to create a custom supply list for customers who currently use the Iron Mountain default supply list (that do not already have a custom supply list).

Creating Custom Supply Lists

The screenshot shows the 'Manage Supply Lists' page in the Iron Mountain Connect system. The page title is 'Manage Supply Lists' and it includes a 'Choose Customer(s)' section. Below this, there are instructions: 'Select the supplies to which this customer will have access; deselect to restrict access to supplies.' There are three buttons: '< Choose Customers', 'Cancel', and 'Confirm Summary >'. A table of supplies is displayed with columns for checkboxes, descriptions, and actions. The table contains six rows of supply items, each with a checkbox and a 'Filter' button in the 'Action' column. Callouts are present: a yellow callout with an 'i' icon points to the '< Choose Customers' button, stating 'Go back to the Customer Selection screen and select a different customer.'; an orange callout with a '7' icon points to the 'Confirm Summary >' button, stating 'Click Confirm Summary to review the customers and supplies that will make up this custom supply list. Clicking Confirm Summary does NOT save your list.'; and another orange callout with a '6' icon points to the first checked checkbox, stating 'Click to select supplies to add to this list.'

Administration

RECORDS MANAGEMENT

Administration << Manage Supply Lists ? Help

Manage Organizations

> Manage Supply Lists

Manage Box Templates

Manage File Templates

Manage Addresses

Choose Customer(s)

Select the supplies to which this customer will have access; deselect to restrict access to supplies.

< Choose Customers Cancel Confirm Summary > Reset View

Description

Type here then click filter

	Description	Action
<input checked="" type="checkbox"/>	2000 [2000 STANDARD LETTER/LEGAL CARTON] 15"L x 12" W x 10"H	Filter
<input type="checkbox"/>	2000 B [2000 STANDARD LETTER/LEGAL CARTON (Bottom Only)] 15"L x 12" W x 10"H	Filter
<input type="checkbox"/>	2000 T [2000 STANDARD LETTER/LEGAL CARTON (Top Only)] 15"L x 12" W x 10"H	Filter
<input checked="" type="checkbox"/>	2000A [2000A AUTO-FOLD LETTER/LEGAL CARTON] 15"L x 12" W x 10"H	Filter
<input type="checkbox"/>	2000A B [2000A AUTO-FOLD S ONLY (Bottom Only)] 15"L x 12" W x 10"H	Filter
<input type="checkbox"/>	2000A T [2000A AUTO FOLD LETTER/LEGAL CARTON (Top Only)] 15"L x 12" W x 10"H	Filter

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Creating Custom Supply Lists

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Choose Customer(s) Choose Supplies Confirm Summary

Review the summary of the supply list you created and the customers assigned

< Choose Supplies Cancel Finish

Summary

Customers
RC2M1
LIES
100 STANDARD LETTER/LEGAL
2000A AUTO-FOLD LETTER/LEGAL

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100% 6

Go back to the Supply Selection screen and choose different supplies or add supplies to this list.

Review and verify that the customers and supplies assigned to the list are correct. Click Finish to save this custom supply list.

Discard this list, return to the Manage Supply Lists screen and restart the process of creating a custom supply list.

Viewing & Editing Custom Supply Lists

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Custom supply lists limit the supplies accessible to a customer. Customers not assigned a custom supply list automatically use the default list.

Create New Supply List Reset View

Customer Supply List	Action
Type here then click filter	Filter
Default: MCCF1, MFAX2, RC2M3, RC2M4, RC2M5, RC2M7, RC2M8, RC2M9, RC2MA, RC2S9	View Supply List You cannot edit or delete the default supply list.
MCARR	View Supply List Remove
RC2M1, RC2M2	View Supply List Remove
ABC, JARR, JSRC2, MARR	View Supply List Remove

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Click to open the Supply List Detail screen and review and edit an existing list.

Viewing & Editing Custom Supply Lists

Supply List: RC2M1, RC2M2

CUSTOMER SUPPLIES HISTORY

The customers associated with this custom supply list.

Customer	Customer Name	Action
then click filter	Type here then click filter	Filter
	RC2M1	
	RC2M2	

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Edit Remove Close

Move between the Customer, Supplies and History tab screens.

2 Click Edit List to change the customers and/or supplies on the list.

You can remove this supply list while in View mode, or from the Manage Supply Lists screen as described in [Removing Custom Supply Lists](#).

Viewing & Editing Custom Supply Lists

3 Select/deselect the customers that use this supply list. Use the multi-select checkbox located to the left of the Customer column to select or deselect all customers.

Supply List: RC2M1, RC2M2

CUSTOMER

Add and remove customer access to a custom supply list are available.

Customer

Type here then click filter

Customer	Description
<input type="checkbox"/> MCCF1	BILLABLE CF TEST, BC=6, REMIT=3
<input type="checkbox"/> MFAX2	FAXTRIEVAL REMIT=1, DEPT BILLCODE=4
<input checked="" type="checkbox"/> RC2M1	RC2M1
<input checked="" type="checkbox"/> RC2M2	RC2M2
<input type="checkbox"/> RC2M3	RC2M3
<input type="checkbox"/> RC2M4	RC2M4
<input type="checkbox"/> RC2M5	RC2M5
<input type="checkbox"/> RC2M7	RC2M7
<input type="checkbox"/> RC2M8	RC2M8
<input type="checkbox"/> RC2M9	RC2M9
<input type="checkbox"/> RC2MA	RC2MA
<input type="checkbox"/> RC2S9	RC2S9

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Save **Cancel**

View Supply List

You cannot edit or delete the default supply list.

View Supply List Remove

View Supply List Remove

View Supply List Remove

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Viewing & Editing Custom Supply Lists

4 Select the Supplies tab.

5 Select/deselect to add or remove supplies from this list.

6 Review the parameters. Click Save to apply any changes made to the list.

Description	Bundle	Action
<input checked="" type="checkbox"/> 2000 [2000 STANDARD LETTER/LEGAL CARTON] 15"L x 12" W x 10"H	10/Pack	
<input type="checkbox"/> 2000 B [2000 STANDARD LETTER/LEGAL CARTON (Bottom Only)] 15"L x 12" W x 10"H	10/Pack	
<input type="checkbox"/> 2000 T [2000 STANDARD LETTER/LEGAL CARTON (Top Only)] 15"L x 12" W x 10"H	10/Pack	
<input checked="" type="checkbox"/> 2000A [2000A AUTO-FOLD LETTER/L		
<input type="checkbox"/> 2000A B [2000A AUTO-FOLD S ONLY (E		

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Save Cancel

Removing Custom Supply Lists

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Custom supply lists limit the supplies accessible to a customer. Customers not assigned a custom supply list automatically use the default list.

Create New Supply List

Reset View

Customer Supply List	Action
Type here then click filter	Filter
Default: MCCF1, MFAFX2, RC2M3, RC2M4, RC2M5, RC2M7, RC2M8, RC2M9, RC2MA, RC2S9	View Supply List You cannot edit or delete the default supply list.
MCARR	View Supply List Remove
RC2M1, RC2M2	View Supply List Remove
ABC, JARR, JSRC2, MARR	View Supply List Remove

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1 Click Remove to begin the process of permanently deleting a custom supply list.

Removing Custom Supply Lists

The screenshot shows the 'Manage Supply Lists' page in the Iron Mountain Connect system. The page title is 'Manage Supply Lists' and it includes a 'Create New Supply List' button. Below the title, there is a table of supply lists with columns for 'Customer Supply List' and 'Action'. The table lists several supply lists, including 'Default: MCCF1, MFAx2, RC2M3, RC2M4', 'MCARR', 'RC2M1, RC2M2', and 'ABC, JARR, JSRC2, MARR'. The 'Action' column for each list contains 'View Supply List' and 'Remove' buttons. A 'Confirm Cancellation' dialog box is overlaid on the table, asking 'Are you sure you want to delete Custom Supply List RC2M1, RC2M2?'. The dialog box has a 'Continue' button and a 'Cancel' button. An orange callout box with the number '2' points to the 'Continue' button.

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Manage Supply Lists

Custom supply lists limit the supplies accessible to a customer. Customers not assigned a custom supply list automatically use the default list.

Create New Supply List

Customer Supply List

Type here then click filter

Default: MCCF1, MFAx2, RC2M3, RC2M4

MCARR

RC2M1, RC2M2

ABC, JARR, JSRC2, MARR

Confirm Cancellation

Are you sure you want to delete Custom Supply List RC2M1, RC2M2?

Continue

Cancel

Action

Filter

View Supply List

You cannot edit or delete the default supply list.

View Supply List Remove

View Supply List Remove

View Supply List Remove

Displaying 1 - 4 of 4

2 Click Continue to permanently delete this custom supply list and return to the Manage Supply List screen. You are not able to recover a supply list that has been deleted.

Customers that were using the deleted list are automatically reassigned to the Iron Mountain default supply list.