



Managing Record Codes

**IRON MOUNTAIN CONNECT™
RECORDS MANAGEMENT**



Managing Record Codes

Record codes drive your retention policy by automatically calculating the length of time a record will be retained. They are defined at the enterprise, customer and department levels.

Use this guide to learn how to:

- Create a record code
- View and edit a record code

Your organization's retention options, which are set by Iron Mountain's account team, determine how each record code and its associated destruction data fields function. Refer to the *Calculating Retention* How To guide for information on assigning and removing record codes and the retention options available in Iron Mountain Connect Records Management.

Creating a Record Code

RECORDS MANAGEMENT

- Administration
- Manage Organizations
- No translation for: wonderbar manageOrgGroups
- Manage Supply Lists
- Manage Box Templates
- Manage File Templates
- Manage Addresses
- > Manage Record Codes
- Manage Holds
- Search, Retrieve
- Pickups, Add Records
- Order Supplies
- Administration
- Track Orders

Manage Record Codes

Create, assign and remove record codes. Use record codes to calculate retention.

Create Record Codes

Reset View

Level	Record Code	Record Code Title	Destruction Eligi...	Active	Customer	Division	Department	Action
All	Type here then click	Type here then click	Type here then click	All	Type here then click	Type here then click	Type here then click	Filter
Enterprise					CDRPT [RPT CUSTOMER FOR RCC PROJECT]	All Divisions	All Departments	Action
Enterprise					CDRPT [RPT CUSTOMER FOR RCC PROJECT]	All Divisions	All Departments	Action
Enterprise	EDM	EDM	12 months after Event Date	Yes	CDRPT [RPT CUSTOMER FOR RCC PROJECT]	All Divisions	All Departments	Action
Enterprise					CDRPT [RPT CUSTOMER FOR RCC PROJECT]	All Divisions	All Departments	Action
Enterprise					CDRPT [RPT CUSTOMER FOR RCC PROJECT]	All Divisions	All Departments	Action
Enterprise					CDRPT [RPT CUSTOMER FOR RCC PROJECT]	All Divisions	All Departments	Action
Enterprise					CDRPT [RPT CUSTOMER FOR RCC PROJECT]	All Divisions	All Departments	Action
Enterprise					CDRPT [RPT CUSTOMER FOR RCC PROJECT]	All Divisions	All Departments	Action

3 Click Create Record Codes. The New Record Code screen opens.

2 Select Manage Record Codes to open the Manage Record Codes screen.

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

Creating a Record Code

The screenshot displays the 'Manage Record Codes' section of the Iron Mountain Connect interface. A 'New Record Code' modal form is open, showing the following fields and options:

- Customer:** JSRC2 [SRVC CF,BC=B,RMT=5] (dropdown menu)
- Division:** MASTER DIVISION (dropdown menu)
- Record Code:** Q1 (text input)
- Destruction Eligibility:** Undefined (radio button selected)
- Department:** 10 [10] (dropdown menu)
- Record Code Title:** First Quarter (text input)
- Customer Record Code:** (checkbox)

Callout 1 (yellow box): Your internal retention policies and the way that Iron Mountain Connect Records Management is set up determine which Destruction Eligibility options are available to you.

Callout 2 (orange box): Select the customer.

Callout 3 (orange box): Determine which organization level this record code applies to:

- To create a record code that applies to all divisions and departments, click the Customer Record Code checkbox. The Division and Department fields are removed.
- To create a record code that applies only to boxes in a specific department, select the appropriate division then department.

Callout 4 (orange box): Identify the record code with a unique alphanumeric code and associated title.

Callout 5 (orange box): Click Save.

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Manage Record Codes


Create, assign and remove record codes that are used to calculate retention.

Create Record Codes

Reset View

 **NEW RECORD CODE**
Record Code Q1 has been created.

Level	Record Code	Record Code Title	Destruction Eligi...	Active	Customer	Division	Department	Action
All	Type here then click	Type here then click	Type here then click	All	Type here then click	Type here then click	Type here then click	Filter
Enterprise	CDY		54 Years after Create	Yes	CDRPT [RPT TOMER FOR PROJECT]	All Divisions	All Departments	Action
Enterprise	ED-Y	ED			PT [RPT TOMER FOR PROJECT]	All Divisions	All Departments	Action
Enterprise	EDM	ED			PT [RPT TOMER FOR PROJECT]	All Divisions	All Departments	Action
Enterprise	F-I	F.			PT [RPT TOMER FOR PROJECT]	All Divisions	All Departments	Action
Enterprise	INACT	INACT	Permanent	NO	CDRPT [RPT CUSTOMER FOR RCC PROJECT]	All Divisions	All Departments	Action
Enterprise	J1-P	J1-P	Permanent	Yes	CDRPT [RPT CUSTOMER FOR RCC PROJECT]	All Divisions	All Departments	Action

 A success message displays letting you know that the record code was successfully created. Record codes are listed in alphanumeric order organized by level.

Viewing & Editing Record Code Details

RECORDS MANAGEMENT

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Create Record Codes

Reset View

Level	Record Code	Record Code Title	Destruction Eligi...	Active		Department	Action
All	Type here then click	Type here then click	Type here then click	All		Type here then click	Filter
Department	Q1	FIRST QUARTER	Undefined	Yes			Action
Department	UNDEF	UNDEF	Undefined	Yes	MARR [STOR ARREAR,BC=7,RMT=	Customer Not Division-Enabled	[MASTER DEPARTMENT] View Details
Department	UNDEF	UNDEF	Undefined	Yes	MCARR [BILL ARREAR,BC=0,RMT=	Customer Not Division-Enabled	[MASTER DEPARTMENT] Edit
Department		BLANK RECORD CODE	Undefined	No			Action
Department		BLANK RECORD CODE	Undefined	No			Action
Department		BLANK RECORD CODE	Undefined	No	MFAQ2 [FAXTRIEVAL REMIT=1, DEPT BILLCODE=4]	Customer Not Division-Enabled	[MASTER DEPARTMENT] Action
Department	CRCH	CUSTOMER RECORD CODE HOLD	10 Years after To, Else From, Else Receipt Date	Yes	RC2M1 [RC2M1]	Customer Not Division-Enabled	BA DEPT [BETHANNES DEPARTMENT] Action
Department	DH	DEPT HOLD	6 Years after Create Date	Yes	RC2M1 [RC2M1]	Customer Not Division-Enabled	BA DEPT [BETHANNES DEPARTMENT] Action
Department	DR	DEPT REC NO	Undefined	Yes	RC2M1 IRC2M1	Customer Not	BA DEPT Action

1 Click View Details.

Viewing & Editing Record Code Details

2

Review the record code details.

3

To edit the record code, click Edit.

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Select Edit from the Action dropdown on the Manage Record Codes screen to edit the record code without first accessing it in view mode.

The screenshot displays the 'Manage Record Codes' interface. A modal window titled 'View Record Code: Q1' is open, showing the following details:

Customer	
Division	Department
Record Code	Record Code Title
Q1	FIRST QUARTER
Active	On Hold
Yes	No

At the bottom of the modal are 'Edit' and 'Close' buttons. The background shows a table of record codes:

Division	Department	Action
Customer Not Division-Enabled	[MASTER DEPARTMENT]	Action
Customer Not Division-Enabled	BA DEPT [BETHANNES DEPARTMENT]	Action
Customer Not Division-Enabled	BA DEPT [BETHANNES DEPARTMENT]	Action
Customer Not	BA DEPT	Action

The interface includes a sidebar with navigation options like 'Manage Record Codes', a top navigation bar with 'Welcome rc2jen', 'USA', 'SUPPORT', and 'LOG OUT', and a footer with 'Page 2 of 3' and 'Per Page: 100'.

Viewing & Editing Record Code Details

Administration Manage Record Codes

4 Edit the title and the Destruction Eligibility fields.

Edit Record Code: Q1 [Close]

RECORD CODE DETAILS

Information about the Record Code. *Required field

Customer

Division Department

Record Code *Record Code Title
Q1 FIRST QUARTER

Active On Hold
Yes No

*Destruction Eligibility

Fixed Time Period
 Permanent

5 Click Save.

Save Cancel

Division	Department	Action
Type here then click	Type here then click	Filter
Customer Not Division-Enabled	[MASTER DEPARTMENT]	Action
Customer Not Division-Enabled	[MASTER DEPARTMENT]	Action
Customer Not Division-Enabled	[MASTER DEPARTMENT]	Action
Customer Not Division-Enabled	[MASTER DEPARTMENT]	Action
Customer Not Division-Enabled	[MASTER DEPARTMENT]	Action
Customer Not Division-Enabled	BA DEPT [BETHANNES DEPARTMENT]	Action
Customer Not Division-Enabled	BA DEPT [BETHANNES DEPARTMENT]	Action
Customer Not	BA DEPT	Action

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