Managing Hold Codes

IRON MOUNTAIN CONNECT™ RECORDS MANAGEMENT

![Iron Mountain logo]

Managing Hold Codes

Hold codes override the retention fields on a record and prevent record destruction. As an administrator you are able to create and apply hold codes to entire record codes and departments; users are able to apply hold codes directly to boxes.

Use this guide to learn how to:

- Create a hold code

- Assign a hold code to a record code

- Assign a hold code to a department

- Remove a hold code from a record code

- Remove a hold code from a department

Refer to the *Assigning & Removing Hold Codes* How To guide for information on assigning and removing hold codes to/from boxes.

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Creating a Hold Code

Iron Mountain Connect — 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 Hold Codes

Create, assign and remove hold codes that prevent record destruction.

Customer: [Select ▾]   [Create Hold Code]   [Reset View]

ℹ Select a customer to view the list of existing hold codes. Click Create Hold Code to add a new hold code.

3 Click Create Hold Code.

2 Select Manage Holds to open the Manage Hold 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 Hold Code

Creating a Hold Code

Assigning a Hold Code to a Record Code

Assigning a Hold Code to a Record Code

Assigning a Hold Code to a Record Code

4 Review and verify that the hold is being placed on the correct record code(s).

5 Click Assign Hold.

Assigning a Hold Code to a Record Code

A success message displays letting you know that the record code(s) was successfully put on hold.

While this hold is active, records with this record code assigned cannot be placed on a destruction order.

Removing a Hold Code from a Record Code

Removing a Hold Code from a Record Code

2 Select one or more record codes that the hold code will be removed from.

3 Click Continue.

Removing a Hold Code from a Record Code

4 Review and verify that the hold is being removed from the correct record code(s).

5 Click Remove Hold.

Removing a Hold Code from a Record Code

A success message displays letting you know that hold was successfully removed from the record code(s).

Records with this record code assigned can now be placed on a destruction order.

Assigning a Hold Code to a Department

Click Assign Hold to Departments.

Assigning a Hold Code to a Department

Assign Hold Code

Select the department(s) that hold code BHC will be assigned to. Continue to apply the hold code.

Department

- ☑ All
- ☑ BA DEPT [BETHANNES DEPARTMENT]
- ☑ WASH [HEALTH CLAIM OFFICE]

Departments Selected — Remove All | Expand All | Collapse All

- ▲ DEPARTMENTS — 2 of 2 Departments Selected
  - BA DEPT [BETHANNES DEPARTMENT]
  - WASH [HEALTH CLAIM OFFICE]

2 Select one or more departments that the hold code will be assigned to.

i Click the Expand All link or the caret to the left of the Department dropdown to view the individual departments.

3 Click Continue.

[Continue >] [Cancel]

Assigning a Hold Code to a Department

4 Review and verify that the hold is being placed on the correct department(s).

5 Click Assign Hold.

Assigning a Hold Code to a Department

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RECORDS MANAGEMENT

Administration «

Manage Hold Codes ❓ Help

Manage Organizations

No translation for: wonderbar manageOrgGroups

Manage Supply Lists

Manage Box Templates

Manage File Templates

Manage Addresses

Manage Record Codes

> Manage Holds

Create, assign and remove hold codes that prevent record destruction.

Customer:
RC2M1 [RC2M1] ▾ | **Create Hold Code** | **Reset View**

✓ **HOLD CODE ASSIGNED** ✕
Hold code BHC has been assigned to departments.

Customer			Notes	Action
Type here then click filter			Type here then click filter	**Filter**
RC2M1 [RC2M1]			BOX HOLD CODE	Action ▾

ⓘ
A success message displays letting you know that the department(s) was successfully put on hold.

While this hold is in place, records assigned to this department cannot be placed on a destruction order.

Search, Retrieve

Pickups, Add Records

Order Supplies

Administration

Track Orders

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Removing a Hold Code from a Department

Click Remove Hold from Departments.

Removing a Hold Code from a Department

Removing a Hold Code from a Department

4 Review and verify that the hold is being removed from the correct department(s).

Remove Hold Code: BHC

Are you sure you want to remove hold code BHC from the following departments?

Departments Selected for RC2M1

Department
BA DEPT [BETHANNES DEPARTMENT]

5 Click Remove Hold.

Remove Hold   Cancel

Removing a Hold Code from a Department