



Managing Hold Codes

**IRON MOUNTAIN CONNECT™
RECORDS MANAGEMENT**



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.

Creating a Hold Code

The screenshot displays the Iron Mountain Connect interface. At the top, the logo 'IRON MOUNTAIN CONNECT' is visible, along with user information 'Welcome rc2jen', a USA flag, and links for 'SUPPORT' and 'LOG OUT'. Below the logo, the 'RECORDS MANAGEMENT' section is highlighted in orange. The left sidebar contains a navigation menu with 'Administration' selected. The main content area is titled 'Manage Hold Codes' and includes a description: 'Create, assign and remove hold codes that prevent record destruction.' Below this, there is a 'Customer:' dropdown menu with 'Select' as the current value and a 'Create Hold Code' button. A 'Reset View' button is also present. A light blue information banner below the form reads: 'Select a customer to view the list of existing hold codes. Click Create Hold Code to add a new hold code.' Three orange callout boxes with numbered blue circles provide instructions: 1. 'Select Administration.' (pointing to the 'Administration' menu item); 2. 'Select Manage Holds to open the Manage Hold Codes screen.' (pointing to the '> Manage Holds' sub-menu item); 3. 'Click Create Hold Code.' (pointing to the 'Create Hold Code' button).

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

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

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 Holds to open the Manage Hold Codes screen.

3 Click Create Hold Code.

Creating a Hold Code

The screenshot shows the 'New Hold Code' form in the Iron Mountain Connect system. The form is titled 'New Hold Code' and has a 'Close' button in the top right corner. The form is divided into sections: 'HOLD DETAILS' (selected), 'Information about the hold code.', and 'Notes'. The form contains several required fields, indicated by an asterisk (*):

- *Customer:** JSRC2 [SRVC CF,BC=B,RMT=5]
- *Hold Code:** LGL
- *Hold Code Description:** Legal Hold:
- *Review Date:** 09/28/2020
- *Approval Date:** 09/28/2016
- *Requestor:** Jonathon Smithe
- *Approver:** Ivy Houser
- *Requestor Phone:** 183833737
- *Approver Phone:** 2123450930

The 'Notes' section contains the text: 'Legal hold for internal investigation'. At the bottom of the form, there are 'Save' and 'Cancel' buttons. The form is overlaid on a sidebar menu with options like 'Administration', 'Manage Organizations', 'Manage Supply Lists', etc. The top of the page shows the user 'Welcome rc2jen', the location 'USA', and options for 'SUPPORT' and 'LOG OUT'.

Numbered callouts provide instructions for each step:

- 4** Select the customer.
- 5** Identify the hold code with a unique three-alphanumeric code and a description.
- 6** Enter additional required fields and any notes about the hold code.
- 7** Click Save.

Creating a Hold Code

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Manage Hold Codes

Create, assign and remove hold codes that prevent record des

Customer:

JSRC2 [SRVC CF,BC=B,RMT=5]



A success message displays letting you know that the hold code was successfully created. The hold code is listed on the screen.

Reset View

NEW HOLD CODE
Hold code LGL has been created.

Customer	Hold Code ^	Description	Notes	Action
Type here then click filter	Filter			
JSRC2 [SRVC CF,BC=B,RMT=5]	ADM	ADMINISTRATIVE HOLD		Action
JSRC2 [SRVC CF,BC=B,RMT=5]	LGL	LEGAL HOLD:	Legal hold for inter >More	Action
JSRC2 [SRVC CF,BC=B,RMT=5]	MRC	MULTI RECORD CODE		Action
JSRC2 [SRVC CF,BC=B,RMT=5]	MUL	MULTI DEPT HOLD CODE		Action
JSRC2 [SRVC CF,BC=B,RMT=5]	NRT	NORTHWESTERN DIVISION	Litigation involving >More	Action
JSRC2 [SRVC CF,BC=B,RMT=5]	SIN	SINGLE RECORD CODE		Action

Assigning a Hold Code to a Record Code

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Manage Hold Codes

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

Customer: RC2M1 [RC2M1]

Customer	Hold Code ▲	Description	Notes	Action
Type here then click filter	<input type="button" value="Filter"/>			
RC2M1 [RC2M1]	BHC	BOX HOLD CODE	BOX HOLD CODE	<input type="button" value="Action"/>

1 Click Assign Hold to Record Codes.

- View Details
- Edit
- Assign Hold to Record Codes
- Remove Hold from Record Codes
- Assign Hold to Departments
- Remove Hold from Departments

- Search, Retrieve
- Pickups, Add Records
- Order Supplies
- Administration
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Assigning a Hold Code to a Record Code

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RECORDS MANAGEMENT

Welcome rc2jen USA SUPPORT LOG OUT

Administration

Organizations

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

Assign Hold Code

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

Select All | Deselect All

Reset View

Level	Record Code	Record Code...	Customer	Division	Department	Action
<input type="checkbox"/>	All	Type here then	Type here then	Type here then	Type here then	Filter
<input type="checkbox"/>	Customer	CRC	CUST REC CODE	RC2M1 [RC2M1]	All Divisions	All Departments
<input checked="" type="checkbox"/>	Customer	CRCH	CUST REC HOLD	RC2M1 [RC2M1]	All Divisions	All Departments
<input checked="" type="checkbox"/>	Department	CRCH	CUSTOMER RECORD CODE HOLD	RC2M1 [RC2M1]	Customer Not Division-Enabled	BA DEPT [BETHANNES DEPARTMENT]
<input type="checkbox"/>	Department	DH	DEPT HOLD	RC2M1 [RC2M1]	Customer Not Division-Enabled	BA DEPT [BETHANNES DEPARTMENT]
<input type="checkbox"/>	Department	DR	DEPT REC NO HOLD	RC2M1 [RC2M1]	Customer Not Division-Enabled	BA DEPT [BETHANNES DEPARTMENT]
<input type="checkbox"/>	Department	GLOB	GLOBAL	RC2M1 [RC2M1]	Customer Not Division-Enabled	WASH [HEALTH CLAIM OFFICE]
<input type="checkbox"/>	Department	BLANK	RC2M1 [RC2M1]	Customer Not Division-Enabled	WASH [HEALTH CLAIM OFFICE]	

3 Click Continue.

Continue Cancel

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Assigning a Hold Code to a Record Code

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RECORDS MANAGEMENT

Welcome rc2jen USA SUPPORT LOG OUT

Administration Management

Organizations

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

Assign Hold Code

? Close X

? Are you sure you want to assign hold code BHC to the following record codes?

Record Codes (2)

Level	Record Code	Record Code Title	Customer	Division	Department
Customer	CRCH	CUST REC HOLD	RC2M1 [RC2M1]	All Divisions	All Departments
Department	CRCH	CUSTOMER RECORD CODE HOLD	RC2M1 [RC2M1]	Customer Not Division-Enabled	BA DEPT [BETHANNES DEPARTMENT]

Reset View

Action

Filter

Filter

CODE

Action

5 Click Assign Hold.

< Record Codes Assign Hold Cancel

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Search, Retrieve

Pickups, Add Records

Order Supplies

Administration

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Assigning a Hold Code to a Record Code

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Manage Hold Codes

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

Customer:
RC2M1 [RC2M1]

 **HOLD CODE ASSIGNED**
Hold code BHC has been assigned to record codes.

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.

Customer	Notes	Action
Type here then click filter	Type here then click filter	<input type="button" value="Filter"/>
RC2M1 [RC2M1]	BOX HOLD CODE	<input type="button" value="Action"/>

Removing a Hold Code from a Record Code

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Welcome rc2jen USA SUPPORT LOG OUT

RECORDS MANAGEMENT

Administration Manage Hold Codes

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

Customer: RC2M1 [RC2M1] Create Hold Code Reset View

Customer	Hold Code ^	Description	Notes	Action
Type here then click filter	Filter			
RC2M1 [RC2M1]	BHC	BOX HOLD CODE	BOX HOLD CODE	Action

1 Click Remove Hold from Record Codes.

- View Details
- Edit
- Assign Hold to Record Codes
- Remove Hold from Record Codes
- Assign Hold to Departments
- Remove Hold from Departments

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Removing a Hold Code from a Record Code

Welcome rc2jen USA SUPPORT LOG OUT

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

Remove Hold Code

Select the record code(s) to remove hold code from.

Select All | Deselect All

Reset View

Level	Record Code	Record Code...	Customer	Division	Department	Action
<input type="checkbox"/>	All	Type here then c	Type here then c	Type here then c	Type here then c	Filter
<input type="checkbox"/>	Customer	CRCH	CUST REC HOLD	RC2M1	All Divisions	All Departments
<input type="checkbox"/>	Customer	CRCH	CUST REC HOLD	RC2M1	All Divisions	All Departments
<input checked="" type="checkbox"/>	Customer	CRCH	CUST REC HOLD	RC2M1	All Divisions	All Departments
<input checked="" type="checkbox"/>	Department	CRCH	CUSTOMER RECORD CODE HOLD	RC2M1	[MASTER DIVISION]	BA DEPT [BETHANNES DEPARTMENT]
<input type="checkbox"/>	Department	DH	DEPT HOLD	RC2M1	[MASTER DIVISION]	BA DEPT [BETHANNES DEPARTMENT]
<input type="checkbox"/>			RC2M1	[MASTER DIVISION]	WASH [HEALTH CLAIM OFFICE]	

3 Click Continue.

Continue Cancel

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Removing a Hold Code from a Record Code

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

Remove Hold Code

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

Record Codes (2)

Level	Record Code	Record Code Title	Customer	Division	Department
Customer	CRCH	CUST REC HOLD	RC2M1	All Divisions	All Departments
Department	CRCH	CUSTOMER RECORD CODE HOLD	RC2M1	[MASTER DIVISION]	BA DEPT [BETHANNES DEPARTMENT]

5 Click Remove Hold.

< Record Codes Remove Hold Cancel

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Removing a Hold Code from a Record Code

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Manage Hold Codes Help

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

Customer: RC2M1 [RC2M1]

 **HOLD CODE REMOVED**
Hold code BHC has been removed from record codes. ✕

Customer	Hold Code	Description	Notes	Action
Type here then click filter			Type here then click filter	<input type="button" value="Filter"/>
RC2M1 [RC2M1]			BOX HOLD CODE	<input type="button" value="Action"/>

 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

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Manage Hold Codes

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

Customer: RC2M1 [RC2M1]

Customer	Hold Code ▲	Description	Notes	Action
Type here then click filter	<input type="button" value="Filter"/>			
RC2M1 [RC2M1]	BHC	BOX HOLD CODE	BOX HOLD CODE	Action ▾

1 Click Assign Hold to Departments.

- View Details
- Edit
- Assign Hold to Record Codes
- Remove Hold from Record Codes
- Assign Hold to Departments
- Remove Hold from Departments

Assigning a Hold Code to a Department

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

3 Click Continue.

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

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Assign Hold Code ? Close X

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

Department

Type here to filter

- 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]

Continue > Cancel

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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.

Assign Hold Code [Close X]

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

Departments Selected Expand All Collapse All

DEPARTMENTS 2 of 2 Departments Selected

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

< Departments **Assign Hold** Cancel

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Assigning a Hold Code to a Department

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Manage Hold Codes

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

Customer: RC2M1 [RC2M1]

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

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.

Customer	Notes	Action
Type here then click filter	Type here then click filter	<input type="button" value="Filter"/>
RC2M1 [RC2M1]	BOX HOLD CODE	<input type="button" value="Action"/>

Removing a Hold Code from a Department

- Administration
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- Manage File Templates
- Manage Addresses
- Manage Record Codes
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Manage Hold Codes Help

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

Customer: RC2M1 [RC2M1]

Customer	Hold Code ▲	Description	Notes	Action
Type here then click filter	<input type="button" value="Filter"/>			
RC2M1 [RC2M1]	BHC	BOX HOLD CODE	BOX HOLD CODE	Action ▾

1 Click Remove Hold from Departments.

- View Details
- Edit
- Assign Hold to Record Codes
- Remove Hold from Record Codes
- Assign Hold to Departments
- Remove Hold from Departments

Removing a Hold Code from a Department

Welcome rc2jen USA SUPPORT LOG OUT

IRON MOUNTAIN® CONNECT

RECORDS MANAGEMENT

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RC2M1

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Remove Hold Code: BHC

Select the department(s) to remove hold code from BHC.

Reset View

Department	Action
Type here then click filter	Filter
<input checked="" type="checkbox"/> BA DEPT [BETHANNES DEPARTMENT]	
<input type="checkbox"/> WASH [HEALTH CLAIM OFFICE]	

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Continue Cancel

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

3 Click Continue.

Removing a Hold Code from a Department

The screenshot displays the Iron Mountain Connect web application interface. A modal dialog box titled "Remove Hold Code: BHC" is open, asking for confirmation to remove the hold code from selected departments. The dialog lists "BA DEPT [BETHANNES DEPARTMENT]" as the selected department. An orange callout box with the number "4" points to the dialog, and another orange callout box with the number "5" points to the "Remove Hold" button.

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

5 Click Remove Hold.

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]

Remove Hold Cancel

Removing a Hold Code from a Department

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Manage Hold Codes

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

Customer:
RC2M1 [RC2M1]

 **HOLD CODE REMOVED**
Hold code BHC has been removed from departments.

Customer	Hold Code	Description	Notes	Action
Type here then click filter	<input type="button" value="Filter"/>			
RC2M1 [RC2M1]			BOX HOLD CODE	<input type="button" value="Action"/>

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

Records assigned to this department can now be placed on a destruction order.