Iron Mountain Connect™

User Guide

IRON MOUNTAIN®

Document Information

Iron Mountain Connect™ User Guide

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Module One: Iron Mountain Connect™ Overview

The Iron Mountain Connect system is designed to access and maintain records management information that is managed through Iron Mountain. The system provides secure, easy, quick, online access to records and information.

The Iron Mountain Connect application was developed to make it easy to search for information and place orders within one system.

In addition, Iron Mountain looked at matching its system with some of the drivers in the marketplace. It relates to what an organization might need to do while developing a comprehensive records management program.

Much of the functionality is based on "The Four Pillars of Records Management." The four pillars are guidelines that consist of components of developing and maintaining a compliant records management program in cooperation with current laws and regulations, along with individual company policies and procedures.

The Four Pillars of Records Management:

- **Consistency**: All of your information, across your departments, divisions, and/or business lines can be maintained in one system. All of your information can be classified or indexed the same way every time.
- **Accountability**: Access to use the Iron Mountain Connect system is provided to an entire customer organization if requested. The application can be an extension of your internal website. The ability to post documents, communications, and policies and procedures all in one location, gives companies the access needed to learn and review the information that they are held accountable and responsible for.
- **Adoption**: The ease of use in the Iron Mountain Connect system makes the adoption of a program feasible across all levels of an organization. The system has been designed with self-service features that will encourage users to want to use it.
- **Access:** All information is gathered in one place to meet the need of accessibility. The option to search for, request and run reports on information can be conducted with just a few clicks. The site is secure so only those needing to have access to the system will be allowed.

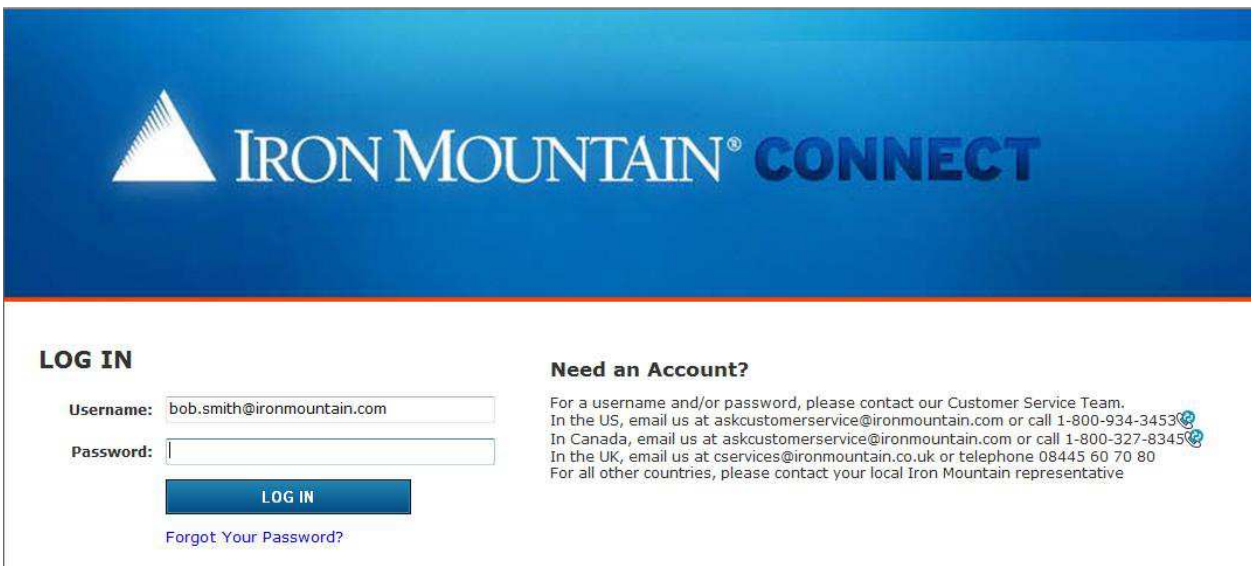
Accessing Iron Mountain Connect

1. In your browser, type www.ironmountainconnect.com, and click Enter:

2. On the login page, enter your username and password.

3. Click Login

Note: Your Iron Mountain Account Manager will provide your new username and password. If you do not have an Account Manager, contact Iron Mountain and they will provide your username and password. You may not have duplicate email addresses in the system.



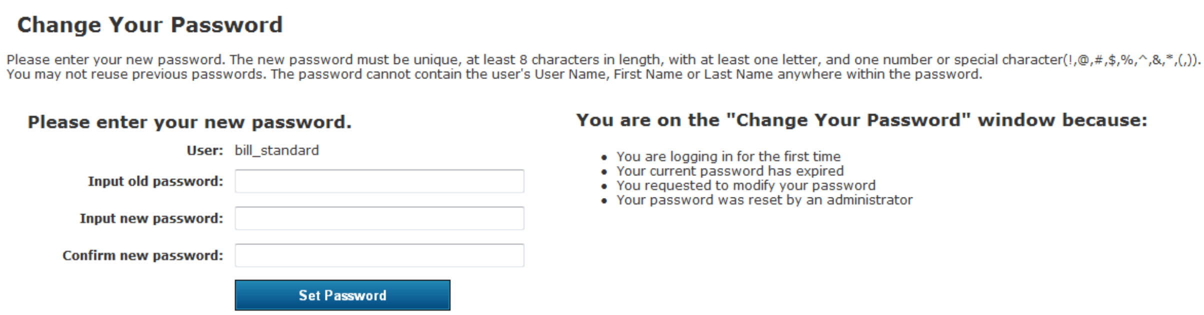
The system displays "Iron Mountain Connect" homepage.

Initial Sign On

The first time you sign on as a new user, you will need to change the temporary password you have been given.

Passwords must meet the following criteria:

- At least 8 characters long
- Contain at least one letter and
- Contain at least one number or special character
- Cannot have been used previously



Change Your Password

Please enter your new password. The new password must be unique, at least 8 characters in length, with at least one letter, and one number or special character(!,@,#,$,%,^,&,*,(,)). You may not reuse previous passwords. The password cannot contain the user's User Name, First Name or Last Name anywhere within the password.

Please enter your new password.

User: bill_standard

Input old password:

Input new password:

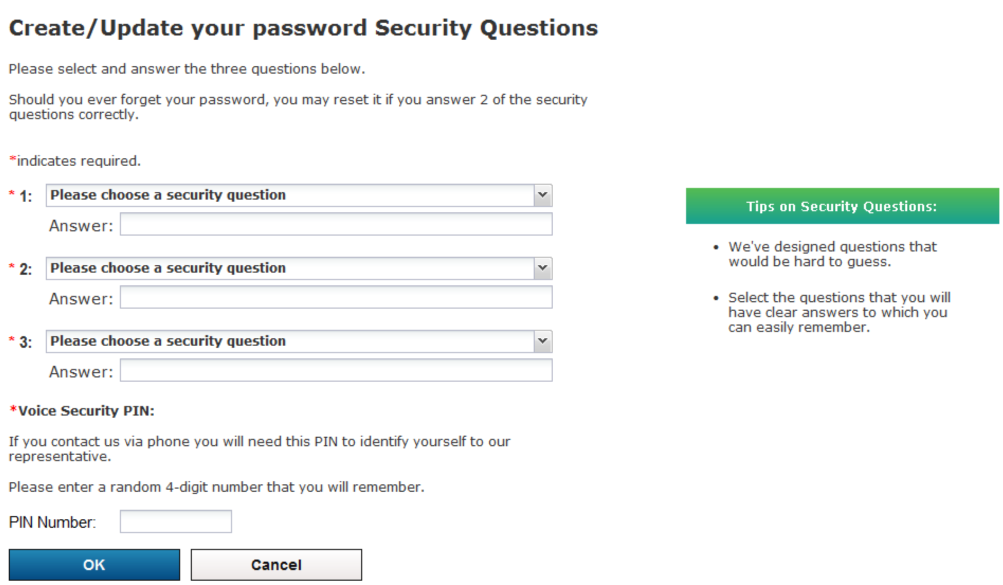
Confirm new password:

Set Password

You are on the "Change Your Password" window because:

- You are logging in for the first time
- Your current password has expired
- You requested to modify your password
- Your password was reset by an administrator

You will also need to set up security/challenge questions. These questions are used if you forget your password or have locked yourself out of the system with three unsuccessful attempts to enter your password.



Create/Update your password Security Questions

Please select and answer the three questions below.

Should you ever forget your password, you may reset it if you answer 2 of the security questions correctly.

*indicates required.

* 1: Please choose a security question

Answer:

* 2: Please choose a security question

Answer:

* 3: Please choose a security question

Answer:

*Voice Security PIN:

If you contact us via phone you will need this PIN to identify yourself to our representative.

Please enter a random 4-digit number that you will remember.

PIN Number:

OK Cancel

Tips on Security Questions:

- We've designed questions that would be hard to guess.
- Select the questions that you will have clear answers to which you can easily remember.

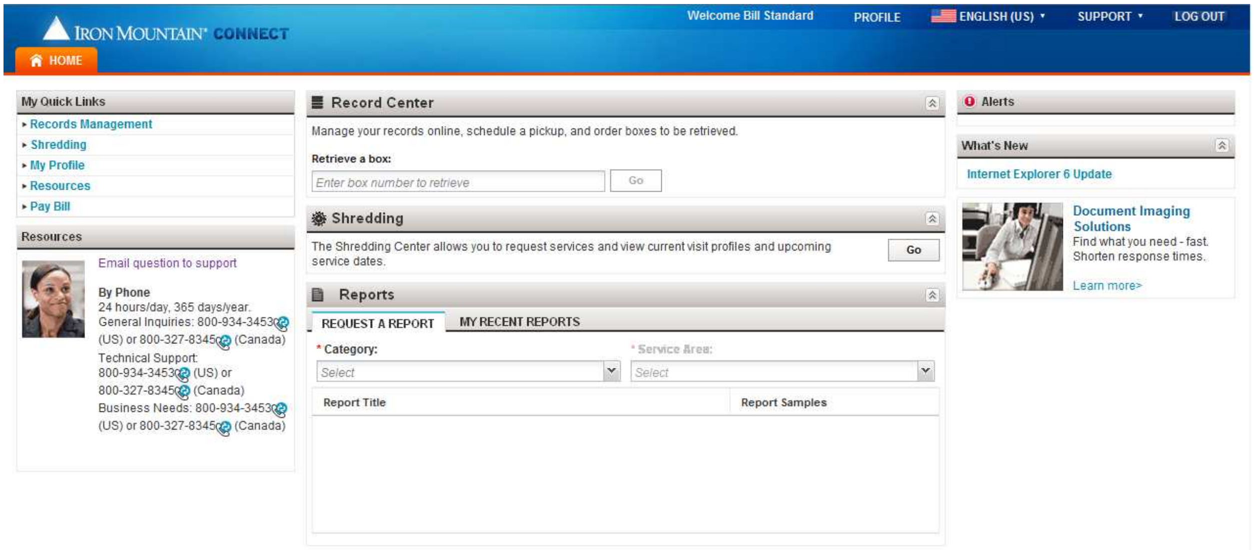
You will need to select three challenge questions (out of 12 available questions) and enter your answers. If you need to use the Forgot Password function, the system will randomly select two of the three questions for you to answer.

Both questions must be answered correctly and you have three attempts before being locked out of the system.

In addition, you will need to set up a voice response PIN number. This PIN will be used if you contact Iron Mountain by phone to submit a request.

You can modify the selected questions and answers by clicking on the Profile link at the top right.

Iron Mountain Connect™ Homepage



The Iron Mountain Connect Homepage gives you access to components of the system based on your role and the Iron Mountain Services you have access to:

- **Record Center**: is the Records Management application of Iron Mountain Connect. Customers can easily locate cartons or files, search for records, and schedule pick-ups all in one convenient location.
- **Report Center**: Enables customers to request and access reports to monitor their records management practices to ensure the ongoing quality of the program. Audit and compliance reports can be run on Inventory, Financial, Retention, and Activity data.
- **Resources**: You will find Training and other relevant information when you access the Resources tab.
- **Alerts and What's New Section**: Notifies you of any information that will be important regarding Iron Mountain Connect, along with any enhancements that have taken place in the system.
- **Shredding Center and Escrow Center:** You may also have access to these applications, which allow customers to manage their Shred and Escrow Services respectively.

Administrators will also have access to:

- **Manage Users**: This section allows Customer User Administrators (CUAs) to edit and add new users to their company list.
- **Resources (Upload Functionality)**: For Customer Content Administrators (CCAs), the Resources tab has functionality that allows uploading a company logo and company documents (you're your company records policy, retention schedule, etc.).

Accessing Record Center

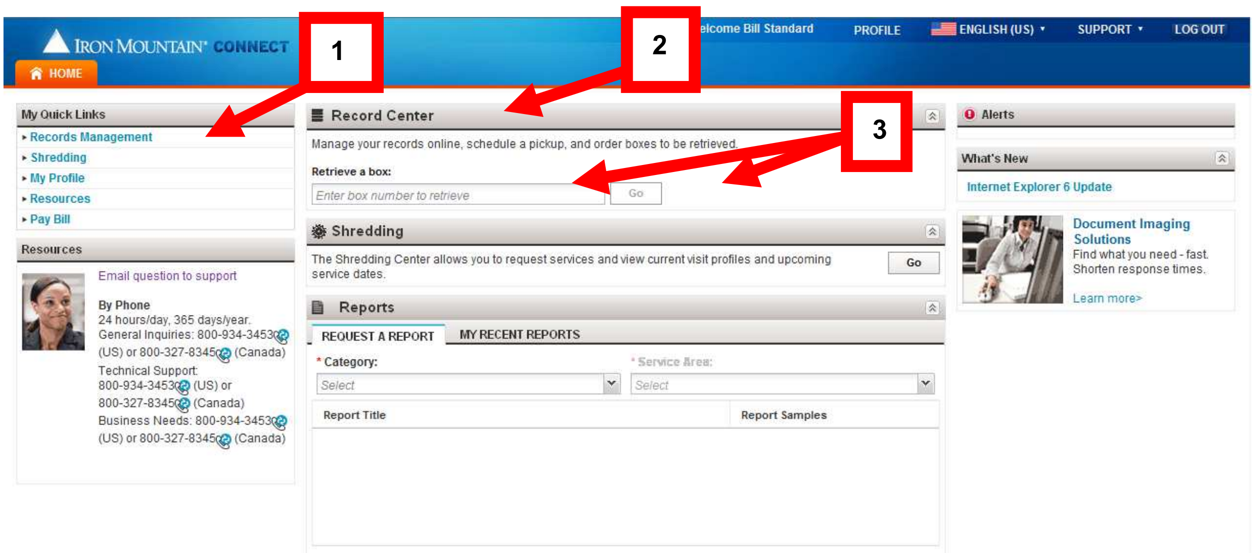
Record Center is where you manage your Records program with Iron Mountain. Based on their access rights and privileges, users in your company access Record Center to search, view, retrieve, and schedule orders for your company's records.

There are three different ways to access Record Center. Type or click one of the following to access Record Center:

1. Click the Records Management Link

2. Click on Record Center in the Records Center Portlet header

3. Enter Search criteria and then click Go



Clicking on any of these options opens a separate window for doing a Basic Search in the Records Center.

Module Two: Searching in the Records Center

Searching in the Record Center

The search function lets you locate information from your inventory. You can locate information for the following:

Boxes

Files

Note: you can search across all of your accounts.

There are three types of search functions in the Record Center:

1. A “Basic Search” lets you type in search criteria for a broad search across your inventory. For example, you may want to look for records associated with the term “mortgage.” By completing a basic search, Iron Mountain Connect pulls all files and boxes that include the word “mortgage.” This may produce numerous results that you can select from.

2. An “Advanced Search” enables you to filter and refine your search based on selected criteria. There are over 55 types of criteria you can choose from to search for your information. For example, if you are an individually listed customer (a customer whose records at Iron Mountain contain information at the individual file level) you may want to look for a specific file with the name “Elm” in the title. For example, you can do the following:

- Search only “files” (as opposed to boxes)
- Search for titles = “Elm”

By completing an advanced search, the Iron Mountain Connect system pulls only the files with the name “Elm” in the title. By using these criteria filters, Iron Mountain Connect produces fewer search results to make it easier for you to find your information.

3. The “Last Search” Results will display the last search that you completed. This may be helpful if you continue to pull the same files and/or boxes from your inventory multiple times. By using the Last Search Results, Iron Mountain Connect pulls only the exact information that you obtained the last time you searched in the system to help save time.

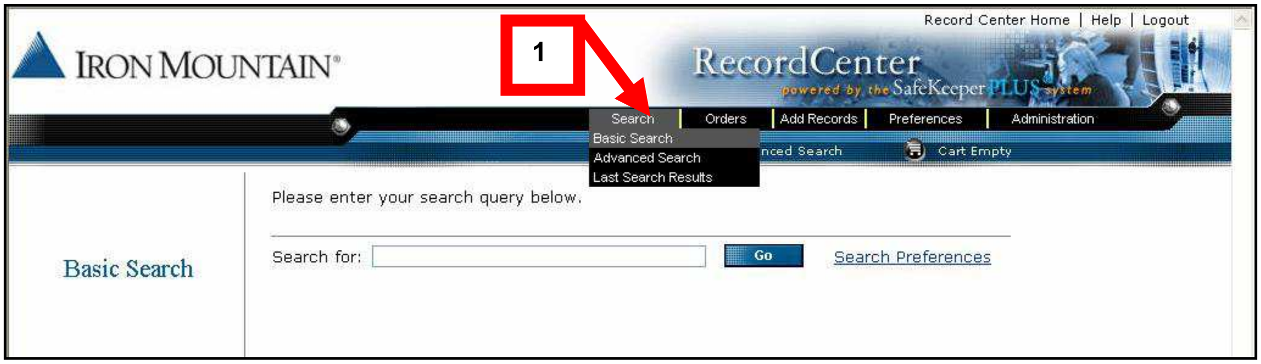
All search types are available from the Search menu, located on the navigation toolbar.

Performing a Basic Search

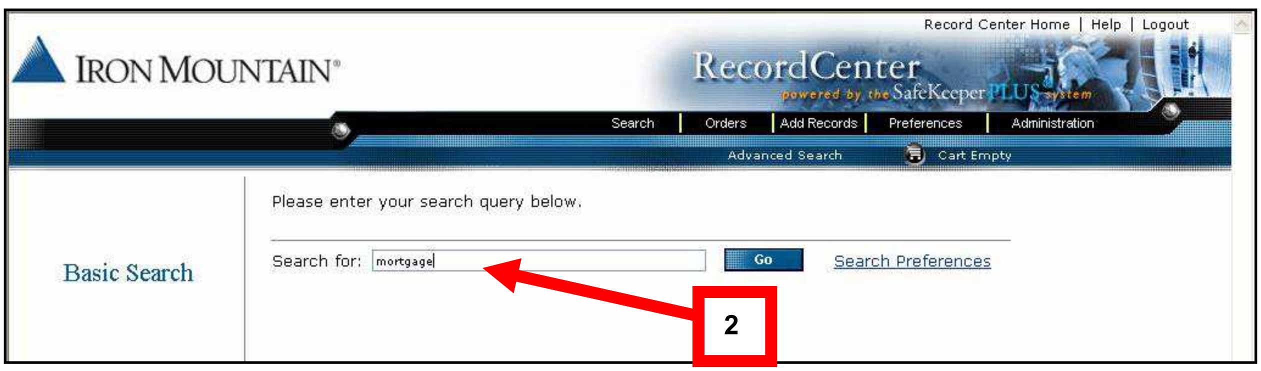
The "Basic Search" function lets you search across all inventory maintained at Iron Mountain. This includes your boxes and files and associated customer account numbers.

To perform a basic search, complete the following steps:

1. From the Search menu, select Basic Search:

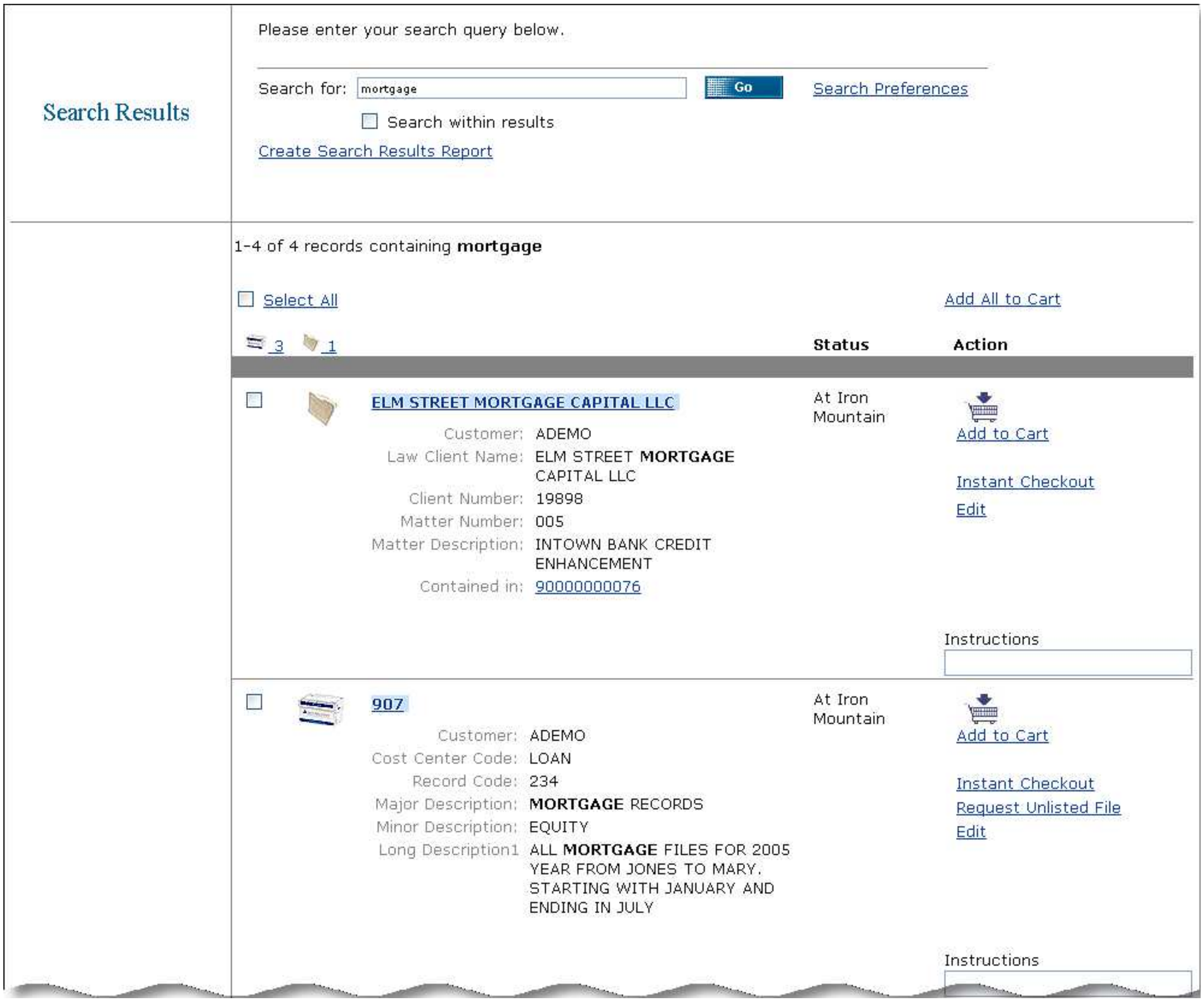


2. Type your search criteria/key word (e.g., mortgage) and click Go.



In the above example, Iron Mountain Connect searches for the word mortgage across the entire inventory in the given account. All files and boxes that include the word mortgage and any criteria that is identifiable in the inventory stored in the Iron Mountain are displayed.

The screen shot below illustrates the search results for the word "mortgage." The speed of the search depends on the amount of inventory stored in your account at Iron Mountain.



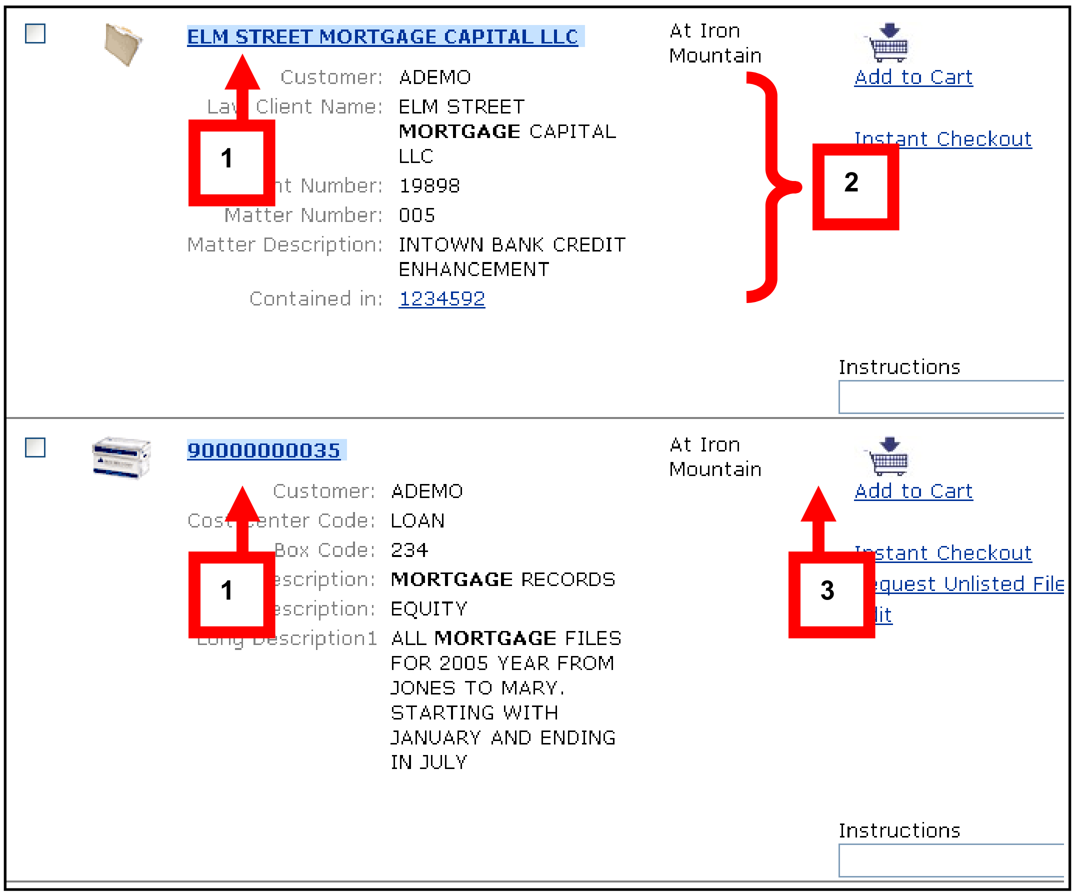
You can use any of the following options in a Basic Search:

- Keywords
- Box number
- File number
- Portions of a word
- Portions of a box/file number

Basic Search Results Details

In the screen shot below, you can see various places where the word "mortgage" is found in the record center (law client name field, major description field, etc.). In addition, the following information is displayed:

1. Whether the information is in a file or a box
2. General information about the file or box stored in the SafeKeeperPLUS system
3. Current location or status of the box



Additional Basic Search Options: Wildcard Search

There are times when you may not know the entire word that you are searching for or you may only know a part of the first or last name that you are searching for.

Iron Mountain Connect provides you with the ability to complete a “wildcard” search. A “wildcard” search allows you to type letters in the word search followed by an asterisk (*). The asterisk is used at the end of the string only.

There are two different types of combinations that you can use to perform a “wildcard” search:

1. First, you can enter MAR* in the “Search for” box and Iron Mountain Connect returns results with any words that begin with the letter MAR in any of the fields available in the system.

2. Second, you can enter multiple words with asterisks for a combination search. For example, enter MAR* and SMI* in the “Search for” box:

It is important to note that “and” is considered an ignored common word. In other words, your search only displays words beginning with MAR and SMI and disregards the word “and.”

Similar to the above, you can retrieve the same results for MAR and SMI by typing it as follows in the “Search for” box:

MAR* SMI*	MAR*, SMI*	Your search disregards the space and comma between MAR* and SMI*

Additional Basic Search Options: Complex Queries

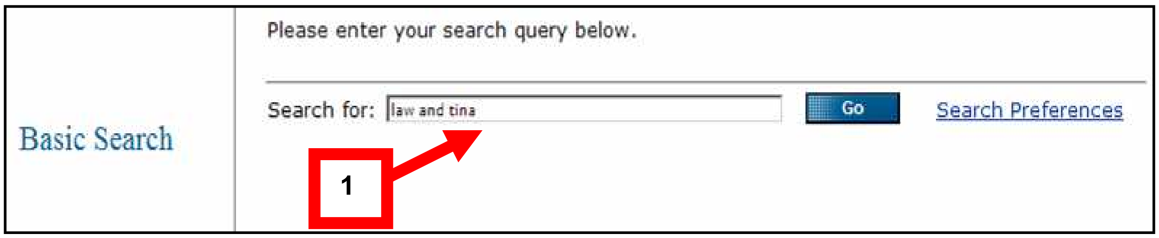
See the chart below for options to create more complex queries.

Desired Outcome	Operator Word/Symbol	Example Query	Results Produced
You do not want to see a certain word associated with another word	not	john not smith	All returns with the word john, except for those associated with smith
You want to see a grouping of results to match a specific word	( ) * use parentheses	john (smith, jones)	All returns with the word john and only with the associated words of smith or jones
You want to see an exact phrase	" " * use quotes	"john smith file"	All returns with the exact phrase john smith file
You want to see something "not shown"	- word * use the minus sign then the word	smith, -john	All returns with the word smith, except for those with john associations (make sure you leave a space after the comma)

Detailed Information from Basic Search

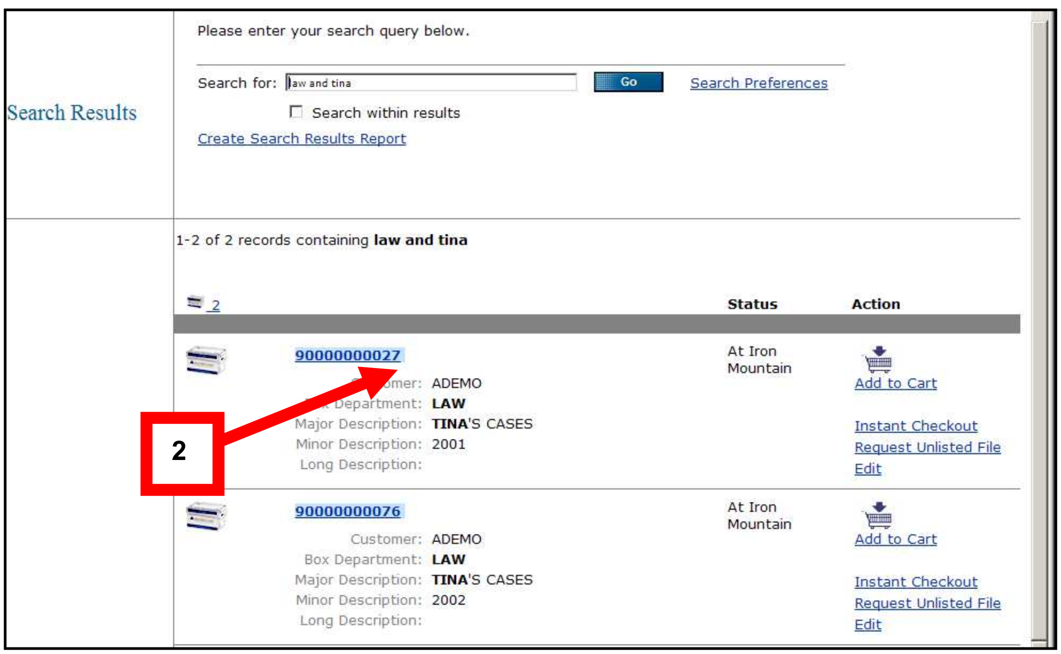
The following is another example of a basic search. In this example, you're looking for a box that contains law files and the name is Tina:

1. Type law and tina and click Go.



Search results displays two boxes for the words "law and tina."

2. Click on the box number and the system will display Box Details.

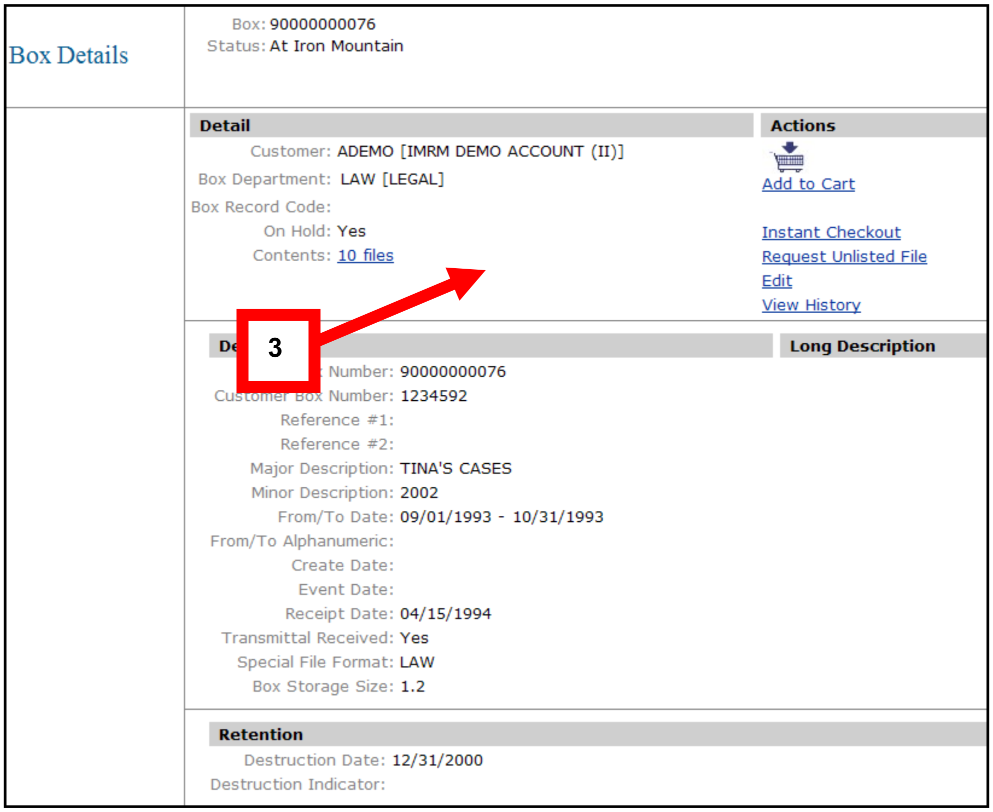


Box Details lists any specific descriptions entered, the receipt date at Iron Mountain, and the size of the box.

For customers who individually list their files, the details will also contain the amount of files listed within the box.

In this example, there are 10 files.

3. Click the Contents hyperlink to view additional details.


Box Details

Box: 90000000076
Status: At Iron Mountain

Detail

Customer: ADEMO [IMRM DEMO ACCOUNT (II)]
Box Department: LAW [LEGAL]
Box Record Code:
On Hold: Yes
Contents: 10 files

Actions

Add to Cart
Instant Checkout
Request Unlisted File
Edit
View History

3

De

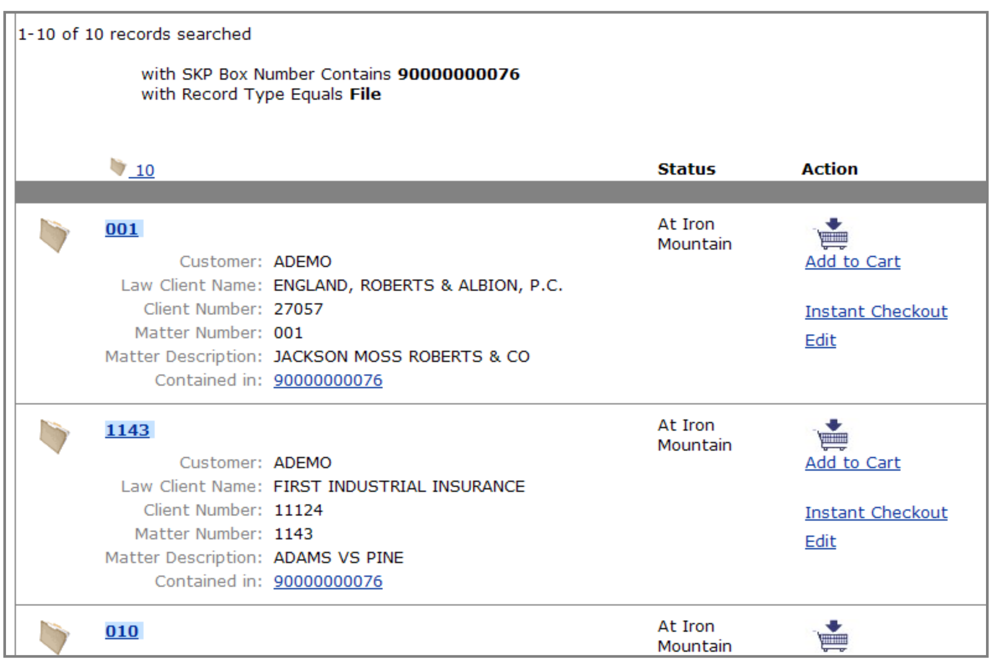
Number: 90000000076
Customer Box Number: 1234592
Reference #1:
Reference #2:
Major Description: TINA'S CASES
Minor Description: 2002
From/To Date: 09/01/1993 - 10/31/1993
From/To Alphanumeric:
Create Date:
Event Date:
Receipt Date: 04/15/1994
Transmittal Received: Yes
Special File Format: LAW
Box Storage Size: 1.2

Long Description

Retention

Destruction Date: 12/31/2000
Destruction Indicator:

The system displays additional information for each of the 10 files contained within that box.


1-10 of 10 records searched

with SKP Box Number Contains **90000000076**
with Record Type Equals **File**

10 | **Status** | **Action**

001 | At Iron Mountain | Add to Cart, Instant Checkout, Edit

Customer: ADEMO
Law Client Name: ENGLAND, ROBERTS & ALBION, P.C.
Client Number: 27057
Matter Number: 001
Matter Description: JACKSON MOSS ROBERTS & CO
Contained in: 90000000076

1143 | At Iron Mountain | Add to Cart, Instant Checkout, Edit

Customer: ADEMO
Law Client Name: FIRST INDUSTRIAL INSURANCE
Client Number: 11124
Matter Number: 1143
Matter Description: ADAMS VS PINE
Contained in: 90000000076

010 | At Iron Mountain

You can click any of the following Actions for either files or boxes:

- Add to Cart
- Instant Checkout
- Edit (depending on privileges granted)

See Module 3: Ordering in the Records Center for information about ordering.

Basic Search Results Review

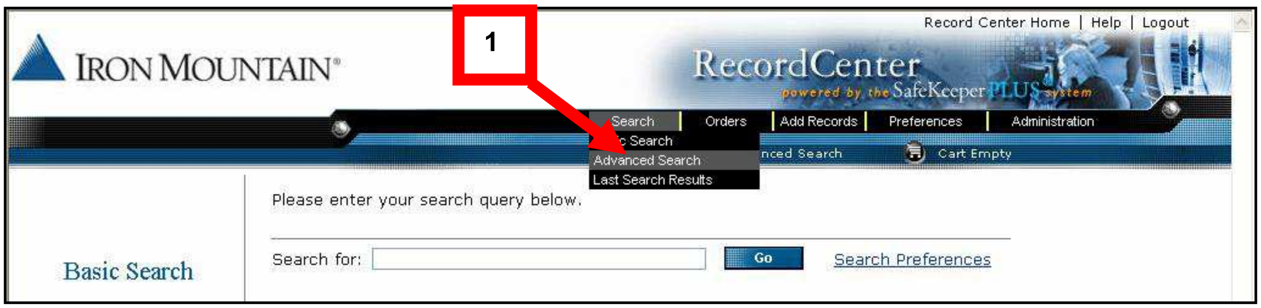
- “Basic Search” is a broad search across all inventory maintained at Iron Mountain. It includes your files, boxes, and account numbers.
- “Basic Search” works similarly to an Internet search engines. The search is not case-sensitive: you may use lowercase and/or uppercase letters. The system only finds whole words. For example, it does not return results in which “law” is embedded in another word as in the word “lawson.”
- The “wildcard” search lets you search on the first few characters of a field if you're unsure of the exact spelling or the entire word.
- “Basic Search” returns up to 2,500 results based on the criteria or key word submitted.
- Iron Mountain Connect can handle complex queries which include or exclude certain words and/or numbers together.
- The search results are gathered based on a relevancy ranking to the criteria or key word entered. The relevancy ranking is based on the following three key factors:
    - Word Score = frequency of the key word (criteria) in the results
    - Asset Age = receipt date from SafeKeeperPLUS
    - Request count = number of times the asset has been ordered
- The Record Center supports the Open Shelf environment. This lets you utilize open shelf for your files that are individually listed in the SafeKeeperPLUS system, to be found through standard searching.
- Any unlisted files can be found and created as a temp file for retrieval.

Performing an Advanced Search

Advanced Search is a more refined search. It allows you to search across all inventory associated with a customer's account number(s). Advanced Search lets you filter your search based on selected criteria.

To perform an Advanced Search:

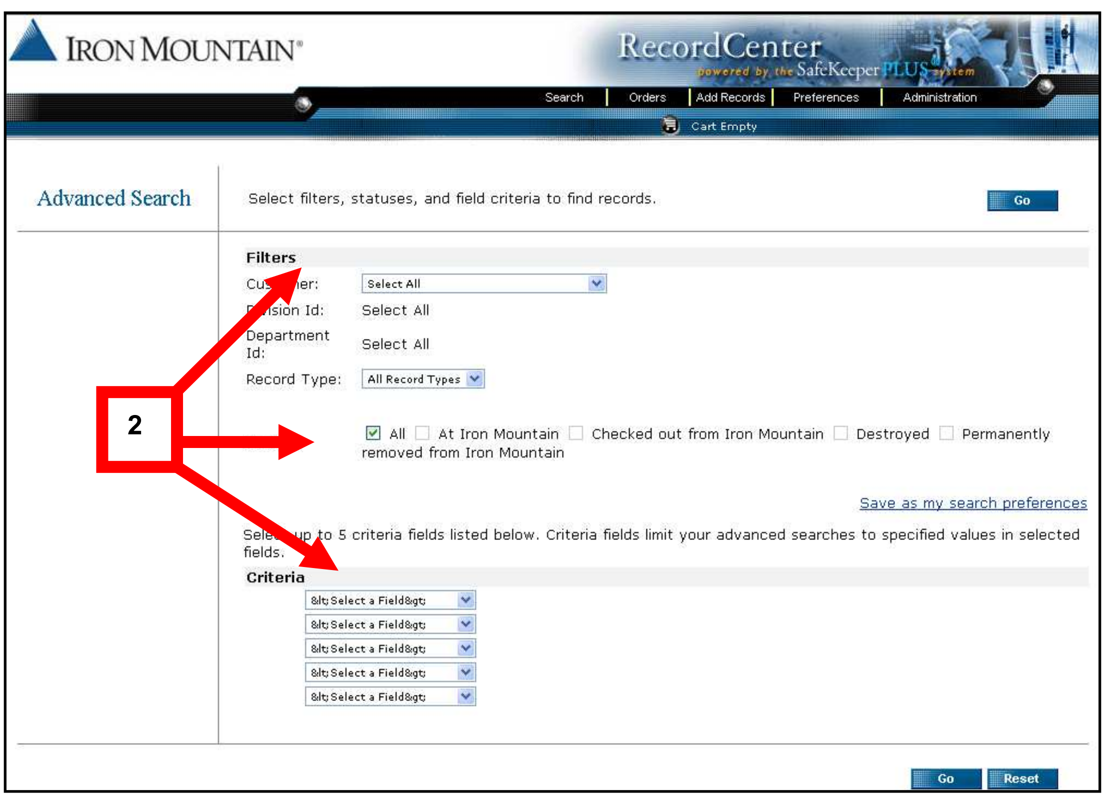
1. From the Search drop down menu, select Advanced Search:



The system displays the Advanced Search screen.

2. Enter the Search criteria.

The Advanced Search screen provides you with additional options to narrow your returned results: designating Filters, indicating item Status and setting selection Criteria.



Filter Selections:

- Selection of the Customer ID or Account from the drop down menu
- Selection of the Division and/or Department
- Selection of Record Type

Status Selections:

- All
- At Iron Mountain
- Checked Out From Iron Mountain
- Destroyed
- Permanently Removed From Iron Mountain

Criteria Selections:

- You can select up to five (5) search criteria.

Search Criteria

Any field	Description 2	Loan Number
Accounting Client Name	Description 3	Long Description
Acquisition Code	Description 4	Loss Date
Alpha Test Range	Destruction Indicator	Major Description
Birth Date	Discharge Date	Matter Description
Borrower Name	Division ID	Matter Number
Box Destruction Date	Entry Year	Matter Sub Number
Box From Date	Event Date	Minor Description
Box To Date	Field Description (1-4)	Office
Box Owner	File Destruction Date	Office Number
Claim/Policy Indicator	File From Date	Old Loan Number
Claim/Policy Number	File Sequence Number	Patient Birth Date
Claimant Insured Name	File To Date	Patient Number
Claimant Name	First Name	Receipt Date
Client Number	Insured Name	Record Code
Cost Center	Last Name	Reference Number 1
Create Date	Law Client Name	Reference Number 2
Customer Box Number	Law Close Date	SKP Box Number
Date Range	Law Letter Code	Social Security Number
Department	Lawyer 1	Symbol
Description 1	Lawyer 2	Volume Number

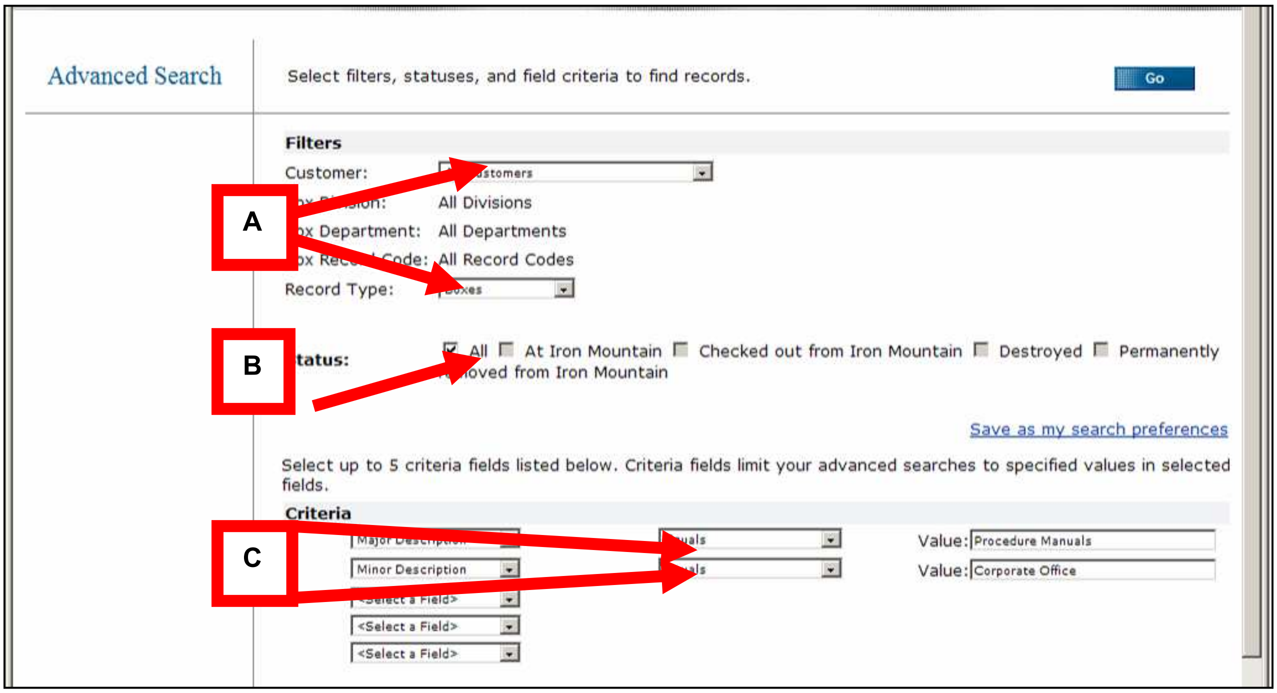
The following is an example of an Advanced Search:

A. Filters - All Customers and Boxes are selected

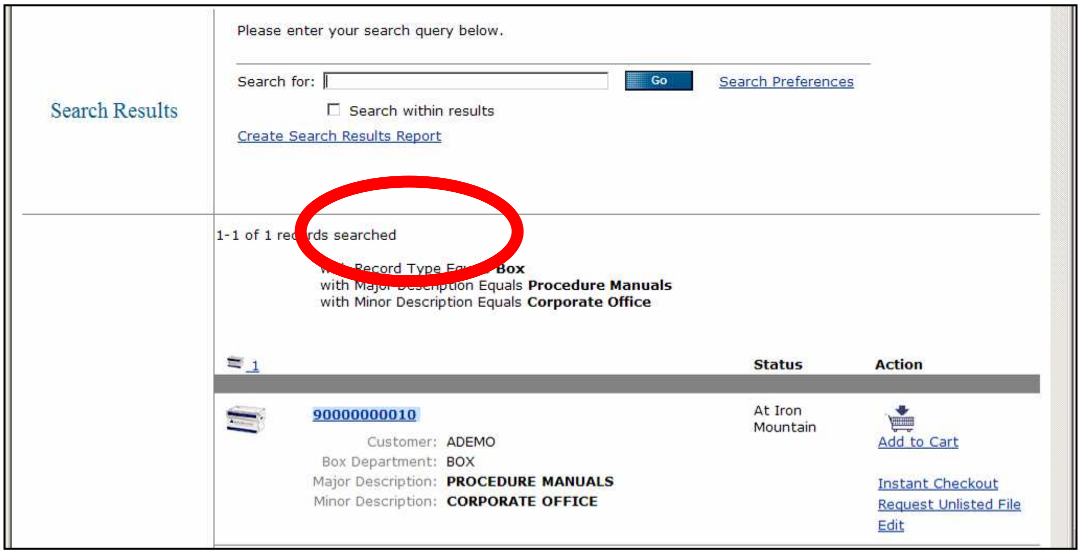
B. Status - All is selected

C. Criteria - Major Description is selected with a value of Procedure Manuals

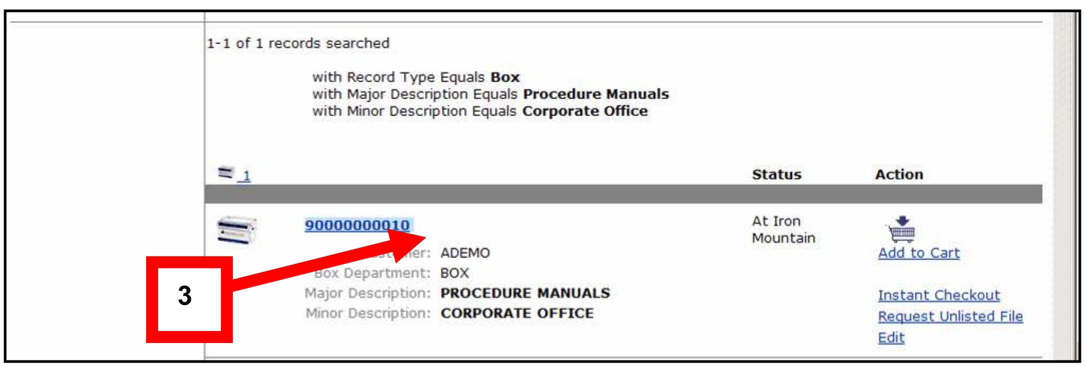
Minor Description is selected with a value of Corporate Office



The search returned only one item matching all the selection options.

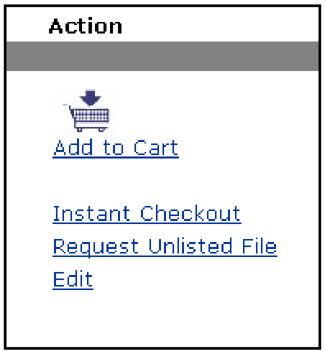


3. Review the box or file details by clicking on the highlighted box and/or file number hyperlink:



4. You can select any of the following Actions:

- Add to Cart
- Instant Checkout
- Edit (depending on privileges granted)



Advanced Search Results Review

- Advanced Search is a refined search across all inventory maintained at Iron Mountain for a given customer and its associated customer account numbers.
- Advanced Search lets you select certain filters, status, and criteria to narrow your search results.
- There are more than 55 types of selection criteria. You can use up to 5 selection criteria options for each advanced search.
- The Record Center supports the Open Shelf environment. This lets you utilize open shelf for your files that are listed in SafeKeeperPLUS, to be found through standard searching. Any unlisted files can be found and created as a temp file for retrieval.

Last Search Results

Last Search Results lets you pull up search results from your last search conducted while logged into that session.

Module Three: Placing Orders in the Record Center

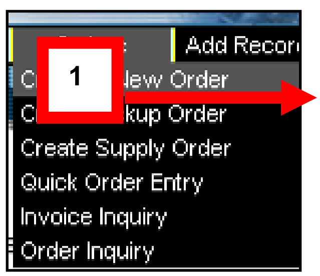
Ordering

There are six different Order options.

- Creating a New Order (for retrieval from Iron Mountain)
- Creating a Pickup Order (to send files or boxes to Iron Mountain)
- Creating a Supply Order (for delivery)
- Creating a Quick Order (fewer screens for ordering)
- Invoice Inquiry (read only inquiries)
- Order Inquiry (read only inquiries)

Create a New Order

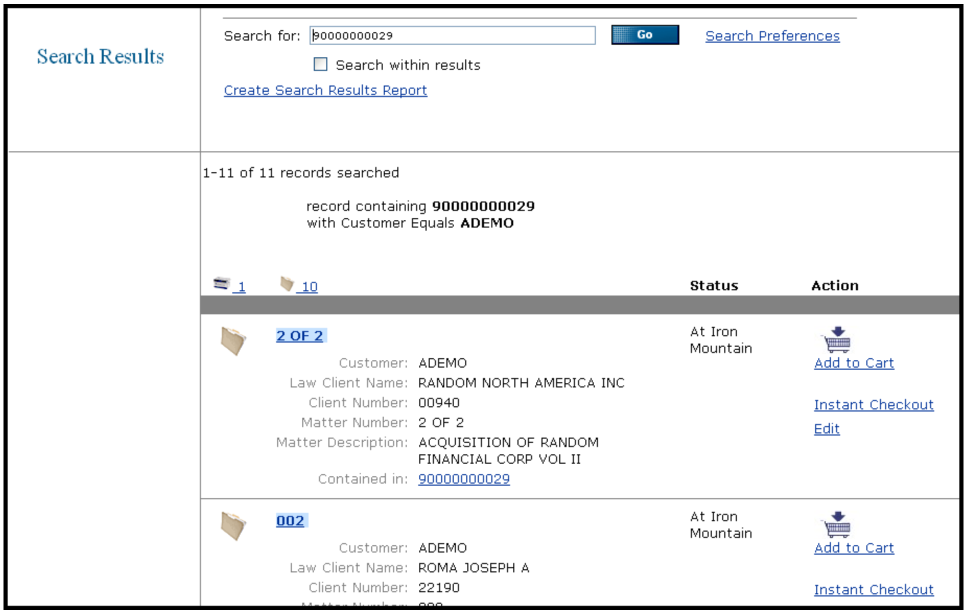
1. Click Orders and select Create a New Order.



The system displays the Basic Search screen.

2. Enter the search criteria (box/file number, etc.) in the Search for box and click Go:

The system displays the Search Results screen.



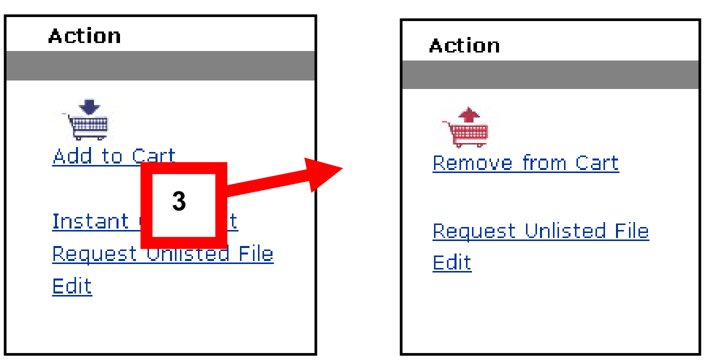
Once the results have returned, you have various options in order to complete the order process.

The options available will vary according to the user privileges you have been granted by the company administrator.

- **Add to Cart**: Add the selected item directly to your cart and continue searching and adding items to your cart
- **Instant Checkout**: Allows you to select one item and go directly to checkout screen
- **Request Unlisted File**: Select specific file from a box that is not individually listed with descriptions
- **Edit**: Allows you to edit any of the fields that were input during the data entry process

3. Click Add to Cart

Note: The Add to Cart link turns red and changes to Remove from cart after the item has been added.

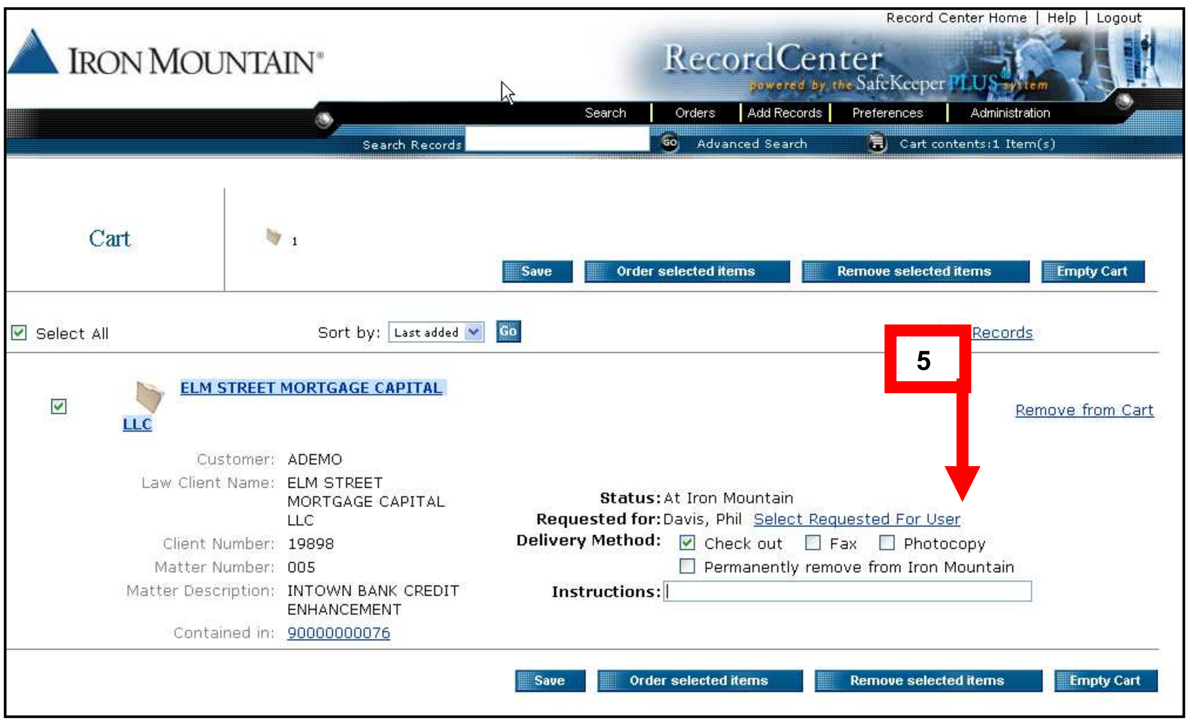


The system adds items to the Cart.

4. From the top of page, click the Cart contents link or shopping cart icon:

The system displays Cart options screen.

5. Click Select Requested For User:



Note: You have the option to change any preferences selected including who you would like the box or file delivered to.

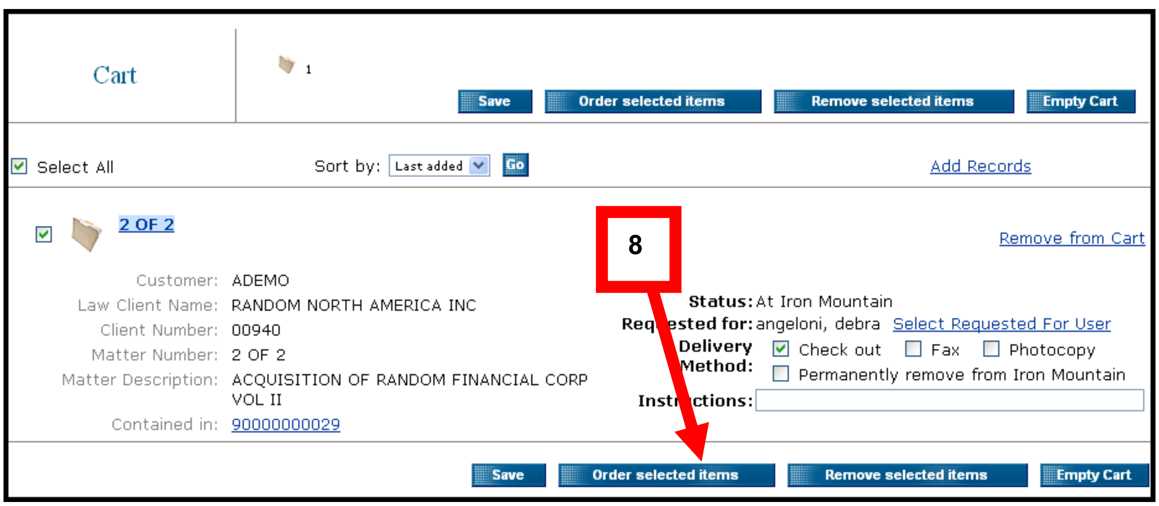
The system displays the Selected Requested For User screen.

6. Click Select next to the name of the desired recipient.

7. From the Cart Options screen, review details, make any revisions, and select one of the following options:

- Save (save the order and complete the process at another time)
- Order selected items
- Remove selected items from cart
- Empty Cart

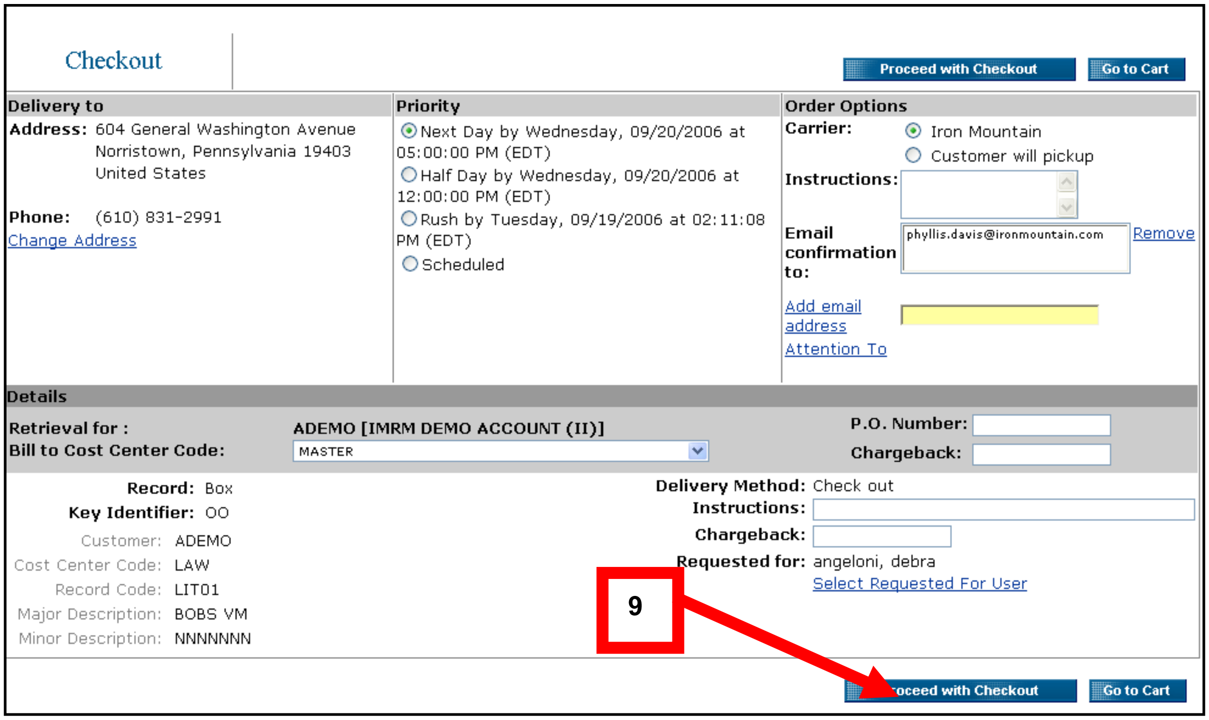
8. Click Order Selected Items:



The system displays the Checkout screen.

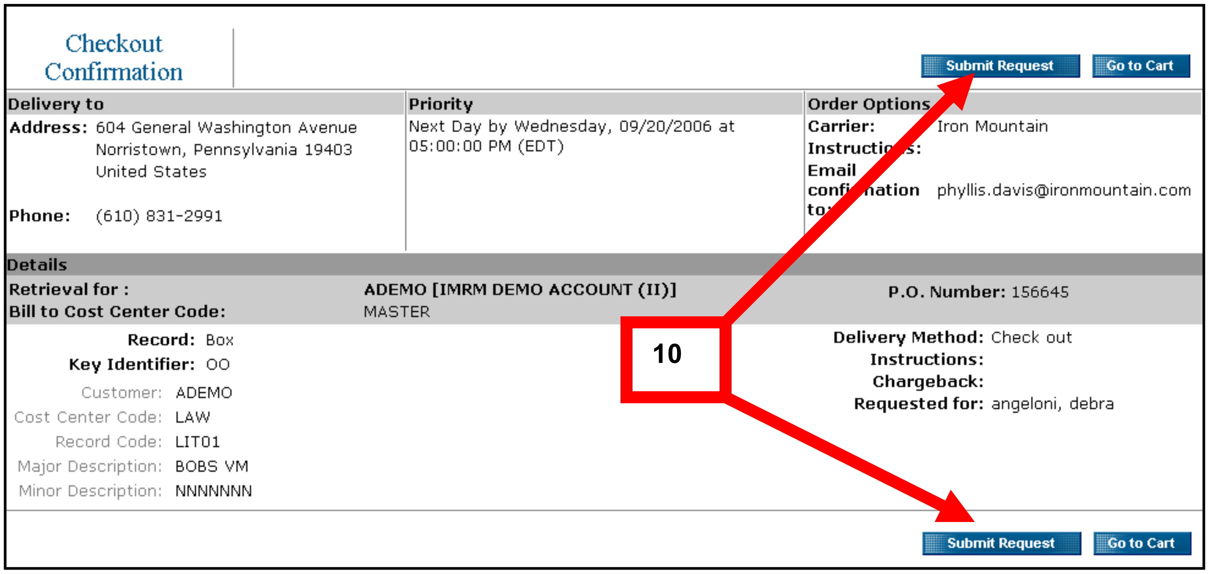
9. Verify/update the following and click Proceed with Checkout:

- Priority option
- Order option
- Instructions
- Email confirmation (provide at least one; you may add up to three)



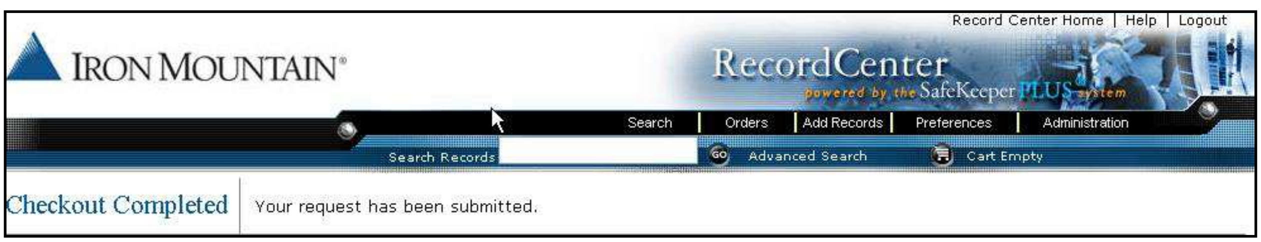
The system displays the Checkout Confirmation screen.

10. Click Submit Request:



The system displays Checkout Completed screen.

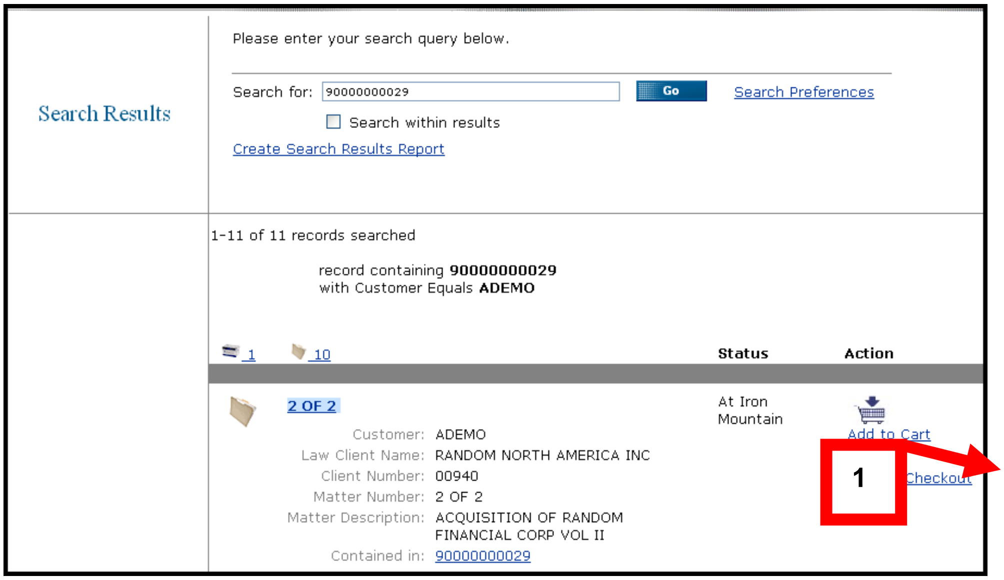
Note: You will receive an email confirmation.



Instant Checkout

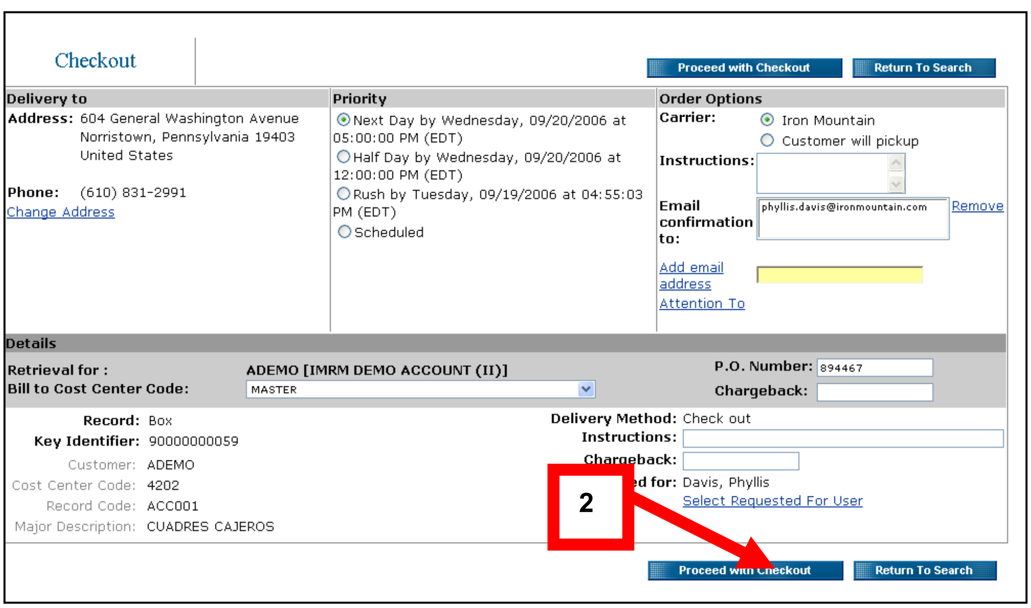
If you are not ordering multiple items (ordering only one item box/file), the Instant Checkout feature allows you to check out immediately, bypassing the need to review the box/file in your cart before checking out.

1. Click Instant Checkout:



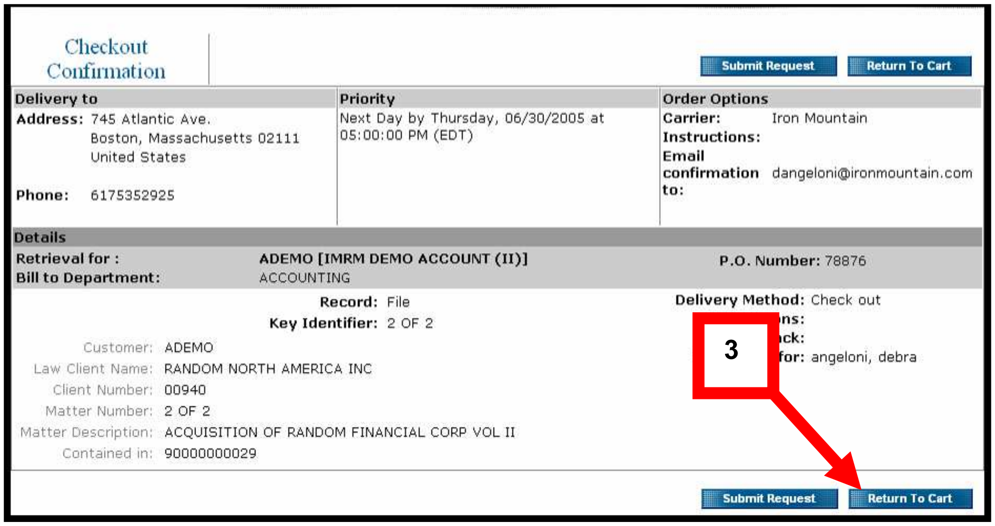
The system displays the Checkout screen.

2. Click Proceed with Checkout:



The system displays Checkout Confirmation screen.

3. Click Submit Request:



The system displays Checkout Completed screen.

Note: You will receive an email confirmation.

Requesting an Unlisted File

Unlisted files are stored files that have not been individually listed. This means that Iron Mountain's inventory does not include file level descriptions of what is inside your box.

To request an unlisted file, you first create a record for the file.

When you create a record for an unlisted boxed file, the data format that you type your information in to depends on the department for the box the file resides in. For example, if the box is from your legal department, then the new file record is in the Law File data format. If no department is specified on the box record, then the new file record is in the Standard File data format.

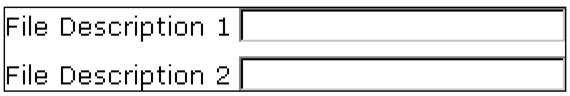
When you create a record for an unlisted Open Shelf file, you select an existing file group or the new file record.

Boxed Files

To request an unlisted boxed file:

1. On a Search Results or Box Details screen, click Request Unlisted File (next to a box record).

2. In the Request Unlisted File window, complete all fields:



(This example is for the Standard File data format.)

3. Do one of the following:

    - To add the file to your Cart, click Add to Cart
    - To order the file now, click Instant Checkout
    - To cancel your request, click Cancel

Note: The value entered in the top field of the Request Unlisted File window becomes the key identifier of the new record.

Open Shelf Files

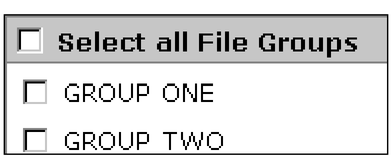
To request an unlisted Open Shelf file:

1. Using Quick Order Entry, search for Open Shelf files

2. In your Quick Order Entry results, click Create unlisted files

3. In the Request Unlisted File window, complete the file description fields

4. Select the file group(s) in which the file is located:



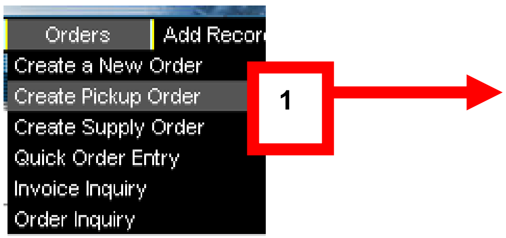
5. Click Save and Return.

Note: The fields that appear in the "Request Unlisted File" window depend on the data format of the Find In field. For example, if you searched for a patient name in Quick Order Entry, the description fields are from the Medical File data format. If the Find In field is File Description 1, the Standard File data format is used.

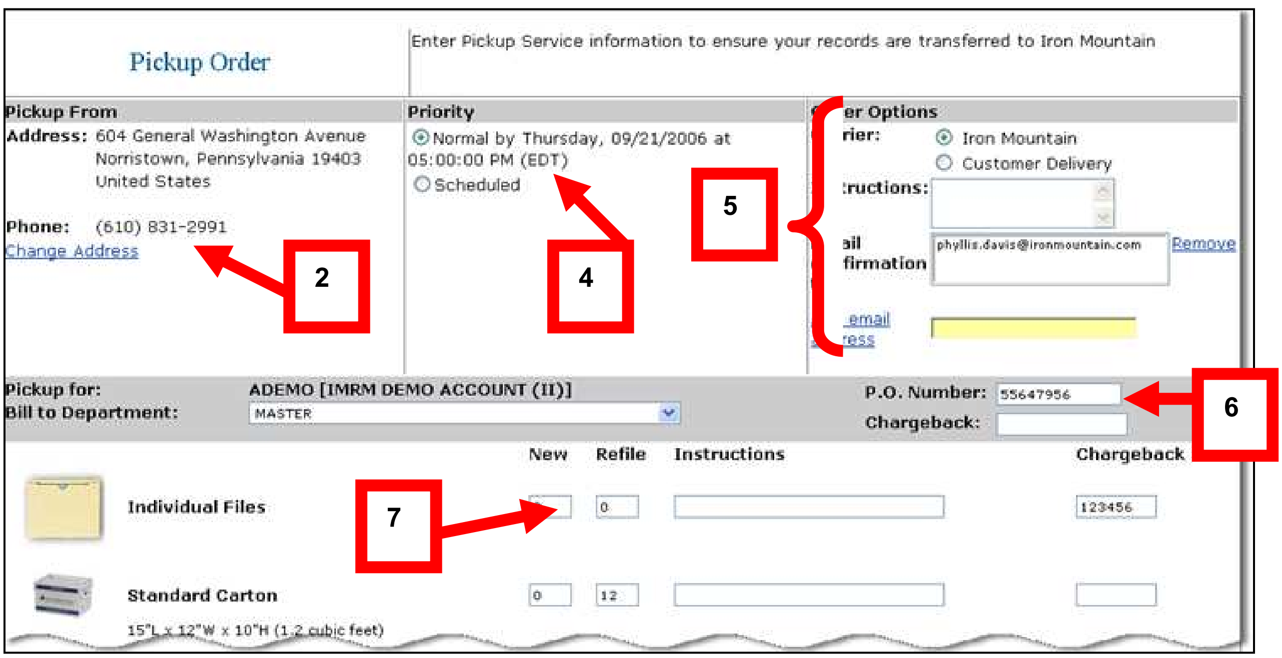
Creating a Pickup Order

You can create pickup orders for items to be transported to an Iron Mountain storage facility. On your pickup orders, you can select the pickup address, service priority, billing and line-item instructions, and vault service. To create a pickup order, follow these steps:

1. Click Orders and select Create Pickup Order.



The system displays the Pickup From screen.

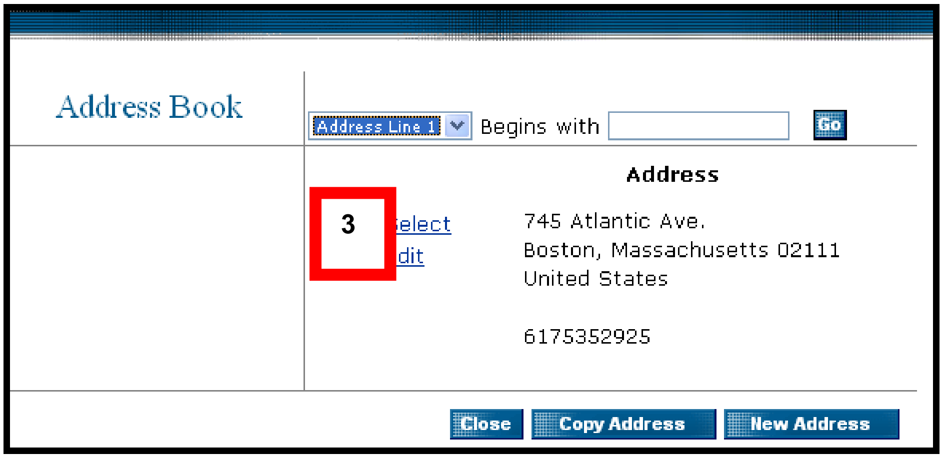


2. If necessary, click Change Address to select another Pickup From address:

The system displays Address Book screen.

3. Select/type revisions needed from the Address Book screen:

- Click Address Line and select from dropdown list
- To update/revise address information, click Edit, make changes, click Use this address
- Click New Address to provide new address info or click Select, and click Close



4. Select a Normal service Priority:

Note: To schedule a later pickup, select a Scheduled service Priority. Type a date in MM/DD/YYYY format or click the calendar icon and select a date.

5. Select/type the following from the Order Options screen:

- Select a Carrier (i.e., Iron Mountain or Customer Delivery)
- Enter up to 120 characters of order-level Instructions
- Type Email confirmation address. You may provide up to three email addresses. To add an address, type the email address in lower box and click Add email address.
- To remove an address, highlight it and click Remove.

6. Select/type the following billing information:

- Select Bill to Division or Bill to Department from the drop down list.
- Enter a P.O. Number (up to 17 characters) and a Chargeback code (up to 20 characters)

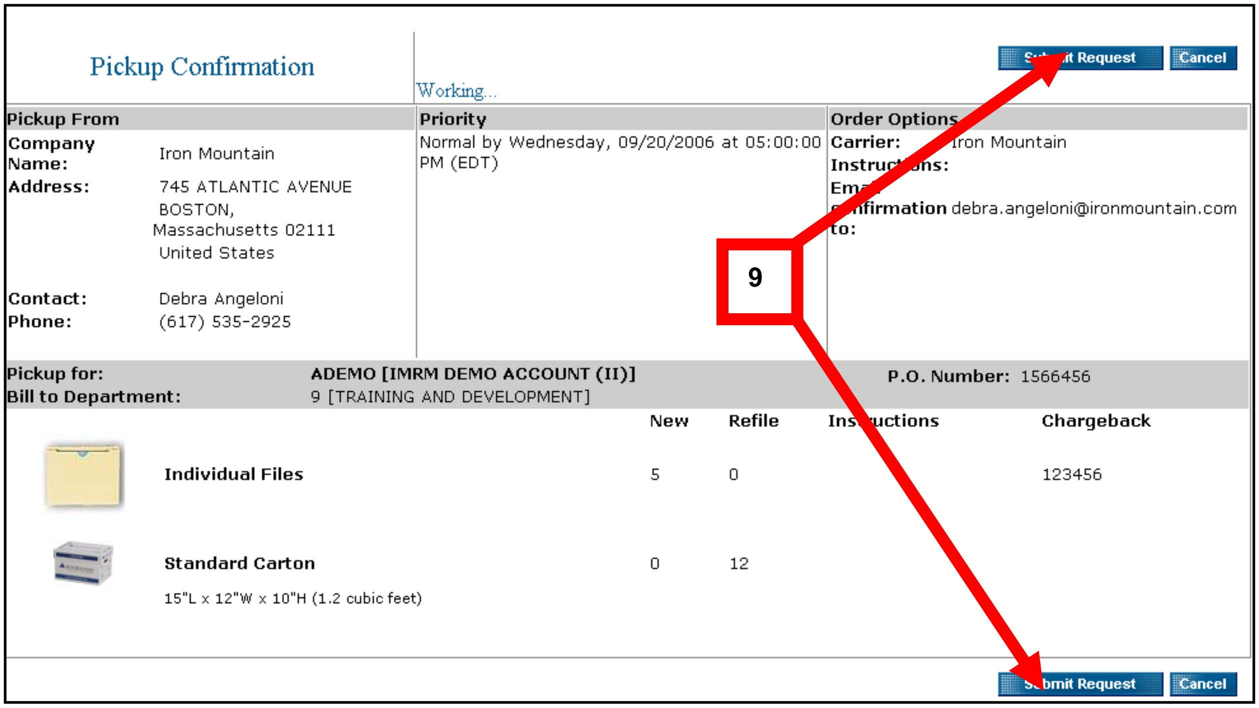
Note: The option to bill to other departments depends on how your account is setup with Iron Mountain. Not all customers will have this option.

7. Type the number of New and Refile items in the files and/or boxes (cartons) and applicable instructions (up to 120 characters). Enter the Chargeback code, if applicable.

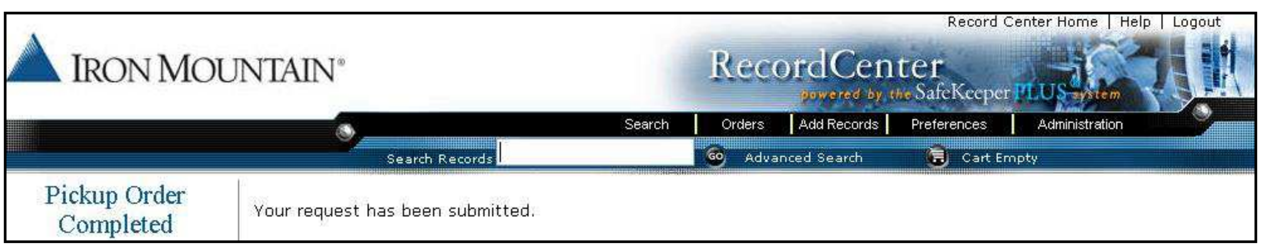
8. To request vault service, select Please provide vault pickup service and click Proceed.

The system displays the Pickup Confirmation screen.

9. Click Submit Request:



The system displays the Pickup Order Completed screen.



You can select the following types of file and boxes (cartons) to be picked up:

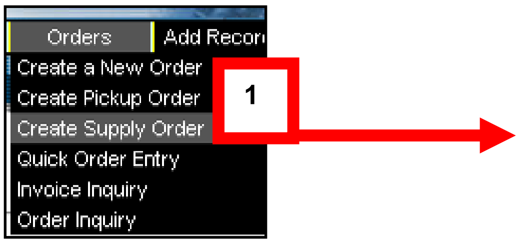
File and Box Types

File or Carton Type	Model #	Dimensions (Capacity)	Uses
Individual Files	NA	Vary	Vary
Standard Carton	2000	15” L x 12” W x 10” H (1.2 ft3)	For letter (8.5” x 11”) or legal (8.5” x 14”) files.
Check Carton	844	24” L x 9” W x 4.5” H	For checks, deposit slips, time cards, cassette tapes, videotapes, and similarly sized documents.
Letter Transfer Carton	450	24” L x 12” W x 10” H (2.4 ft3)	For the contents of a file drawer, twice the capacity of the Standard Letter carton.
Legal Transfer Carton	550	24” L x 15” W x 10” H (3.6 ft3)	For the contents of a file drawer.
X-Ray Carton	200	15” L x 6.25” W x 10” H (1.8 ft3)	For x-rays, ledger books, and similarly sized documents.
Small Planner Carton	630	4” L x 4” W x 42” H	For rolled maps, blueprints, plans, and drawings.
Large Planner Carton	632	9.25” L x 9.25” W x 44” H	For the contents of four (4) Small Planner cartons.

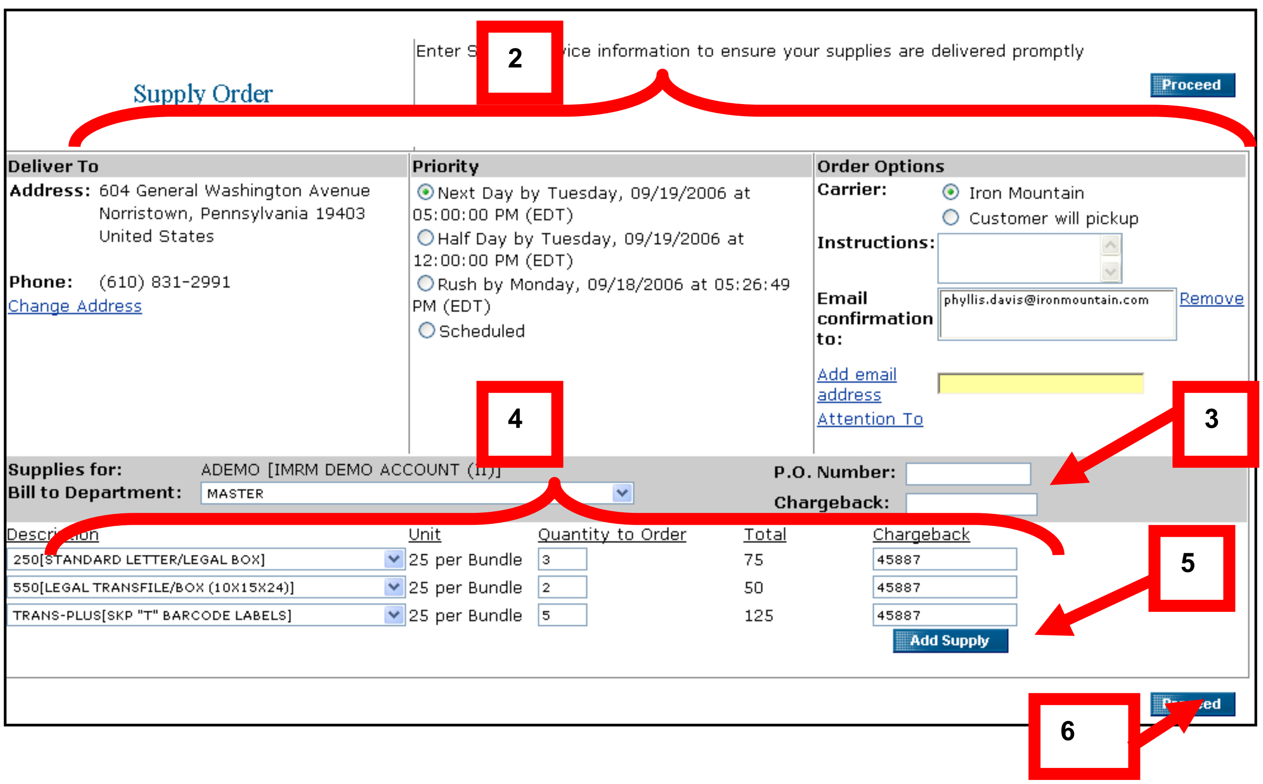
Creating a Supply Order

You can create orders for empty boxes, transmittal sheets, bar code labels, and other storage supplies from Iron Mountain. Depending on your security access, you can create orders and bill supplies to different divisions and departments. For supply prices and a detailed description of supplies, please contact your Iron Mountain Account Manager or Iron Mountain directly. To create a supply order, follow these steps:

1. Click Orders and select Create Supply Order:



The system displays the Supply Order screen.



2. Verify the Deliver to, Priority and Service options (same as with Ordering options)

3. Complete the following billing information:

   - Select Bill to Division or Bill to Department from the drop down list
   - Enter a P.O. Number (17 characters max) and a Chargeback code (20 characters max)

4. Select your supplies from the drop down list under Description.

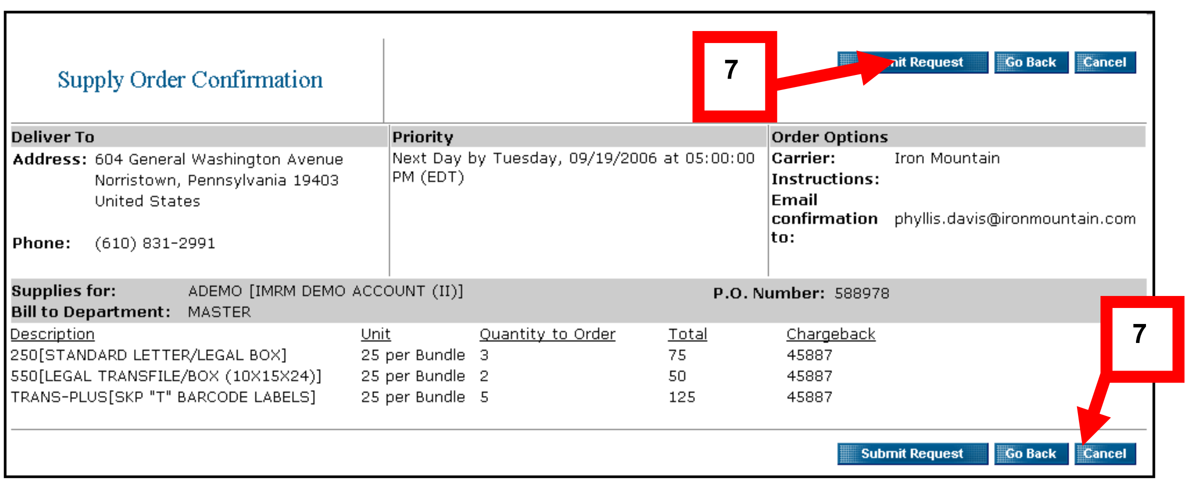
   - From the Quantity to Order box, type the number of units (bundles). Supplies can be ordered in whole units (bundles) only.
   - The total number (units times the quantity to order) of supply items is automatically calculated.
   - Type a Chargeback code in the Chargeback box (optional for supply items)

5. Click Add Supply. You can change the total by entering a new quantity to order.

6. Click Proceed.

The Supply Order Confirmation screen is displayed.

7. Click Submit Request or click Go Back to change your order:



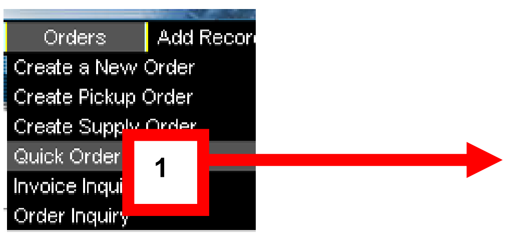
Creating a Quick Order Entry

Quick Order Entry is a rapid order entry command. It is best used when you know which file(s) you would like to order.

- You must first set and or edit your Quick Order Entry Preferences. You can find and add boxed files and Open Shelf files, including unlisted Open Shelf files.
- Files with Find In field values that exactly match your search word(s) are automatically added to your Cart (up to the selected maximum) when you search for boxed files. In addition, files with Find In field values that match the beginning of or your full search word(s) are added to your Cart when you search for Open Shelf files.
- You can also create unlisted Open Shelf files from the applicable file groups and add them to your Cart.
- Quick Order Entry searches are limited to a single field (called the Find In field) in records. To select the Find In field, change your Quick Order Entry preferences.

You must first set/edit your Quick Order Entry Preferences, see steps below:

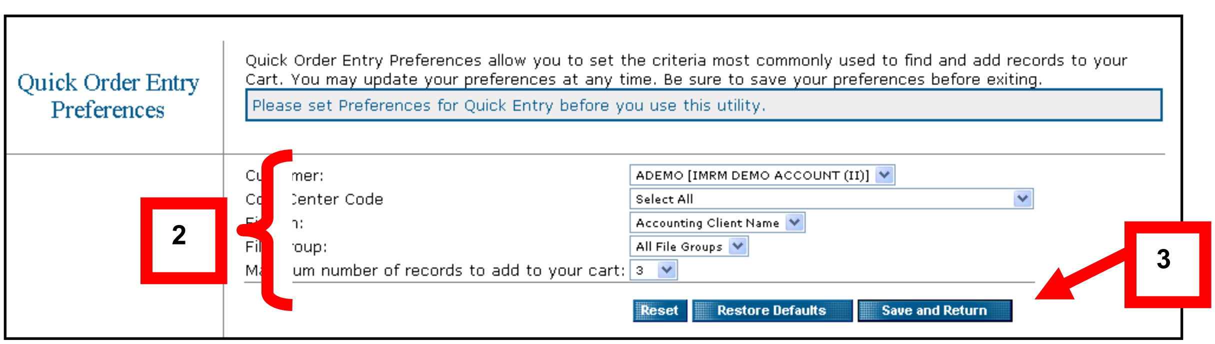
1. Click Orders and select Quick Order Entry.



The system displays Quick Order Entry Preferences screen.

2. Set your Preferences.

Note: As your Quick Order Entry search criteria changes, you must revise your preferences.



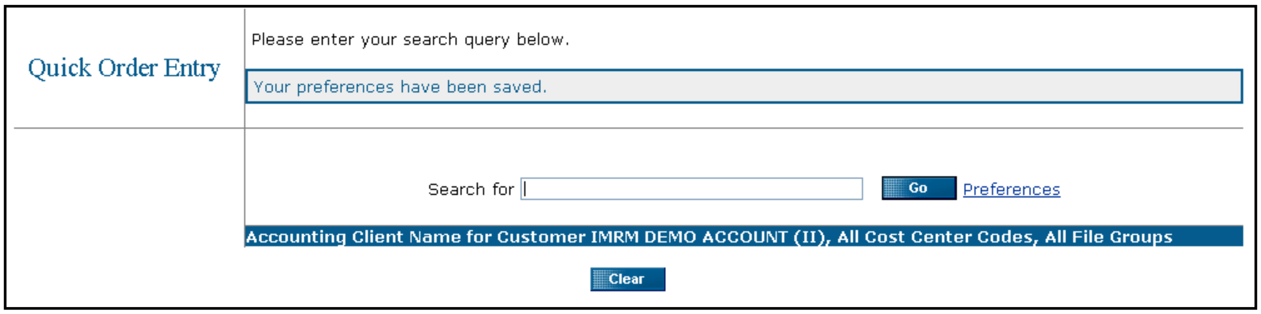
- Select the Customer from the drop down list

- Select the Cost Center from the drop down list
- Select a search criteria from the Find In drop down menu
- Select a File Group from which to search from the drop down menu
- Select a number from the drop down list for Maximum number of records to add to your cart

3. Click Save and Return

Note: you can modify your Quick Order Preferences at any time.

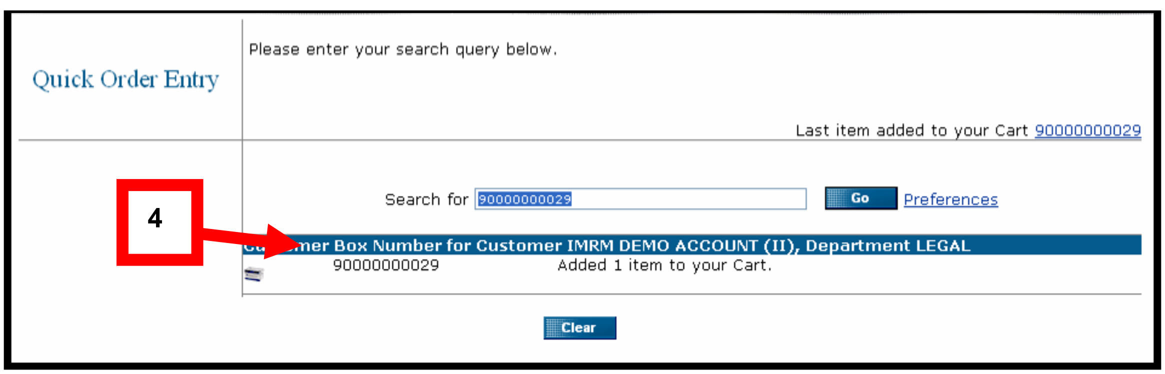
The system returns to the Quick Order Entry screen.



Enter the Search for values in the screen based upon your Preferences and click Go.

Note: If you are searching for boxed files, type the exact value you want to find. If you are searching for Open Shelf files, type the beginning of a Find In field value (e.g., box number 90000000029).

4. The system displays a confirmation that the item was added to your cart.



Troubleshooting:

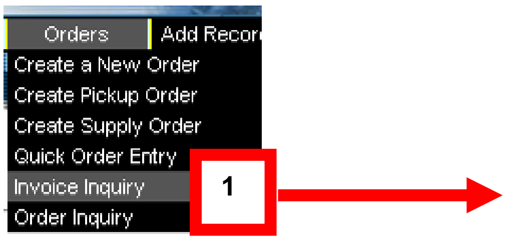
- If you searched for Open Shelf files, and no records are found, the data does not match the format for this File Group or the data does not match any File Group.
- If you searched for Open Shelf files, you can click Create unlisted files to add unlisted files to your Cart.
- If more than the maximum number of records that can be added to your Cart by one quick order entry are found, click More to view the records.
- If records are added to your cart, do one of the following:
- To do another quick order entry, search for a new Find In field value, or change your preferences
- To view the last item added to your Cart, click the key identifier of the record
- To clear your results, click Clear

Note: Your quick order entry results are listed until you clear them or log off from the Record Center. Clearing your results **does not** remove records from your Cart.

Searching for and Viewing an Invoice

You can search for Iron Mountain invoices by date range, invoice number, or order number. Invoices can be viewed by month, customer, division, and department. To search for and view an invoice, follow these steps:

1. Click Orders and select Invoice Inquiry:



The system displays the Invoice Inquiry screen.

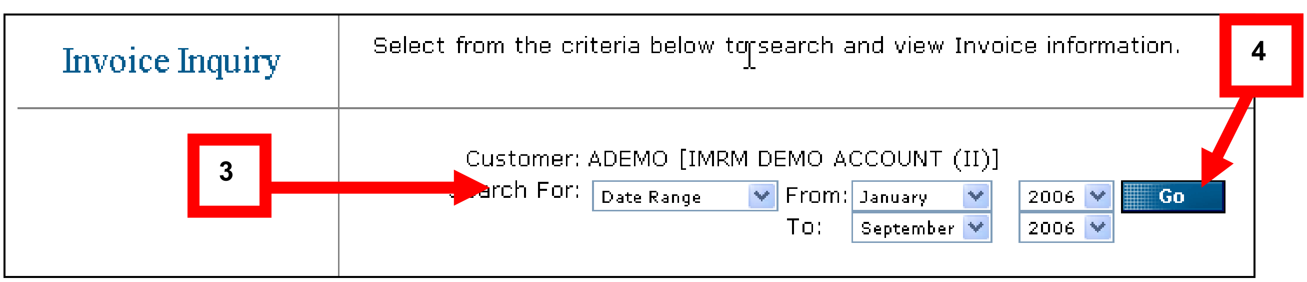
2. Select the Customer and click Go:

3. Select a Search For option (i.e., Date Range, Invoice Number, or Order Number) from the drop down list.

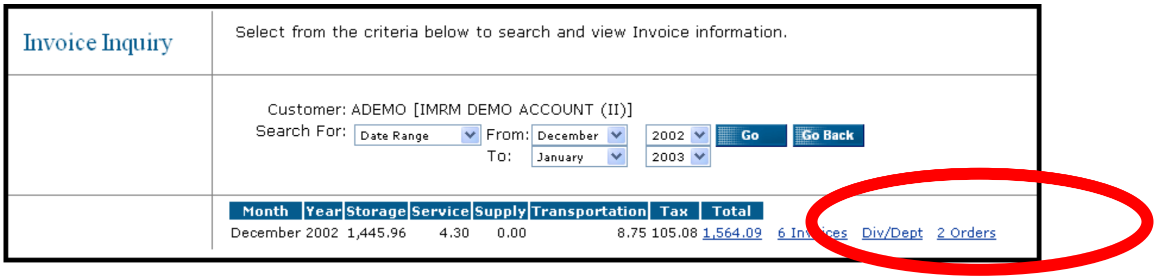
- If you search by date range, select a month in the From and To drop down lists to view more details.
- To view all the transactions for a month, click its Total:

4. Click Go:

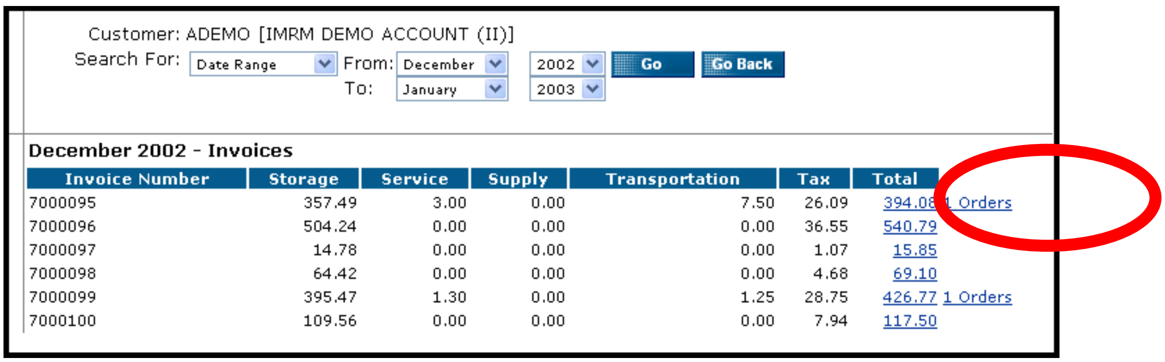
Note: The Customer name will default to your company/account name.



The system displays the Invoices requested.



- To view all the invoices for a month, click the total number of invoices.
- Click an invoice total to view its transactions.
- To view the division and department totals for a month, click Div/Dept:



- Click Go Back to go back to main invoice page.

Note: Invoice charges are determined by the rate schedules and units of measure for the listed transactions. A bill code relates each transaction to the applicable rate.

Invoice Charges

Charge	Unit of Measure	Description
Storage	Cubic feet (ft3)	Storing items at Iron Mountain
Service	Number of transactions	Services such as handling boxes and files, entering and changing records, and database searches
Supply	Number of supplies	Supplies such as empty boxes, file folders, handbooks, and other materials from Iron Mountain
Transportation	Number of shipments or parts of a shipment	Picking up, delivering, and transmitting items and copies to and from storage
Tax	USD or applicable currency	Federal, state, local, and other applicable taxes

Searching for and Viewing an Order

An order is processed when Iron Mountain generates a packing slip for it. This normally occurs when the order is confirmed.

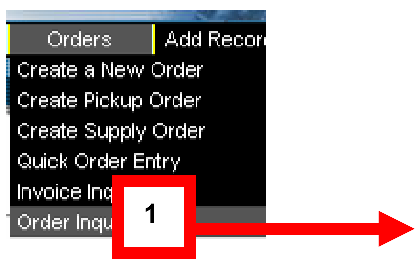
- Retrieval and permanent withdrawal orders: confirmation occurs when the stored items are removed from their shelves and scanned and ready for shipping.
- Pickup orders: confirmation occurs when Iron Mountain receives the order from the customer.

You can find orders that are submitted to Iron Mountain by their order number, request date, order type, or request by user. Depending on their order type and order status, you can view, edit, and cancel orders.

Note: Iron Mountain deletes inactive orders on a weekly basis. An inactive order is a processed order that lists no transactions for six months.

To display an order, follow these steps:

1. Click Orders and select Order Inquiry:

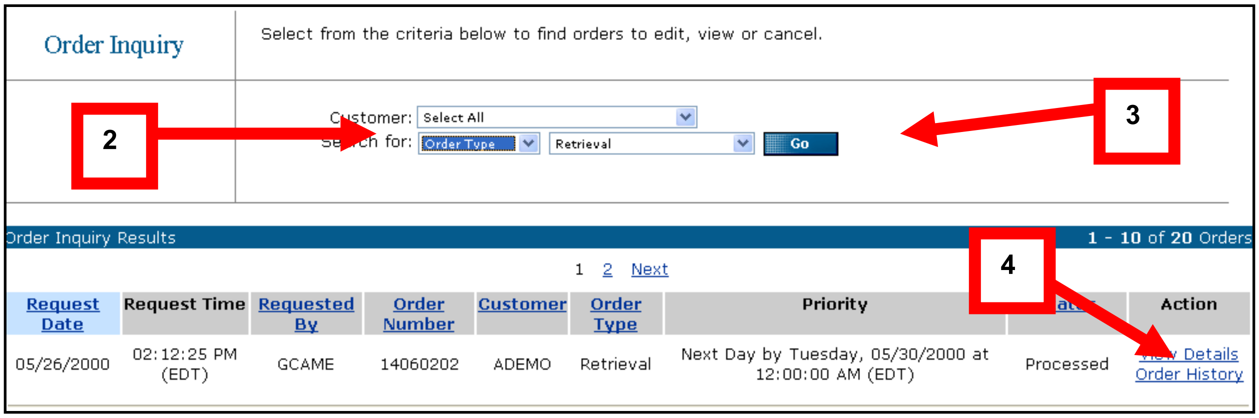


The system displays the Order Inquiry screen.

2. Select from following:

- Select a Customer from the drop down list
- Select one of the following Search for criteria from the drop down list:
- To search by Order Number, type an order number
- To search by Request Date, type a date (click and select a date)
- To search by Order Type, select All and a month and year, or select an order type.
- To search by a Requested By user, type all or part of the user's first name, last name, or the Iron Mountain Connect username.

Note: When searching for orders by “Requested By” user, only orders that are submitted using the Record Center are displayed (not SafeKeeperPLUS or other means).



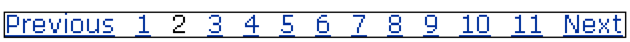
3. Click Go.

4. Click View Details Order History for additional information.

The system lists orders by their Order Number.

5. Click a page number link to browse the results:

Note: If there is more than one result, page number links will appear at bottom of screen.



Additional Order Inquiry Functionality:

If the order status is...	Then click...
Submitted for processing	View Details to display an order Edit Order to edit an order Cancel Order to cancel an order
Processed	Order History to view the transaction history of an order
Any other status	View Details to display an order

Working with Other Types

Order types specify the nature of a request for service to Iron Mountain and the actions you can perform on orders using the Record Center.

Order Type	Description	Actions*
Retrieval	Retrieve items from storage at Iron Mountain and deliver them to a customer.	Submit Request, View Details, Order History, Edit Order, Cancel Order
Permanent Withdrawal	Permanently remove items from storage at Iron Mountain and return them to a customer.	Submit Request, View Details, Order History, Edit Order, Cancel Order
Pickup	Pick up items from a customer and deliver them to an Iron Mountain storage facility.	Submit Request, View Details, Order History, Edit Order, Cancel Order
Supply	Purchase storage supplies, such as boxes and transmittal sheets, from Iron Mountain.	Submit Request, View Details, Order History, Cancel Order
Destruction	Destroy specified items that are stored at Iron Mountain.	View Details, Order History
Image Request	Retrieve images from storage at Iron Mountain and deliver them to a customer.	View Details, Order History
Destruction	Destroy specified items that are stored at Iron Mountain.	View Details, Order History
Research	Find and verify, but do not retrieve, stored items.	View Details, Order History
* The Edit Order and Cancel Order actions can be performed only on orders that have the Submitted for processing order status. In addition, you cannot cancel an order that is being edited by another user.		

Order Status

Order status indicates the current disposition of requests for records or supplies. See the following:

Order Status	Description
Being updated	Order is currently being updated by a user.
Awaiting customer authorization	Destruction order is on hold awaiting authorization by the customer.
Submitted for processing	Order was posted and can be released for processing.
Being processed	Order has been fully or partially released for processing by Iron Mountain.
Processed	Order was processed by Iron Mountain.
Cancelled	Order was cancelled and will not be processed.
On hold	Order was placed on hold, and is not being processed, at the customer's request or for credit reasons.

Module Four: Adding Records in the Record Center

Adding Records

You have the option of adding new inventory (boxes and files) to the Record Center through the Iron Mountain Connect™ system.

- When you add data into the system through Add Records, only the online data exists in our system at that time. It is held in a virtual “holding area.” You must then create a pickup order to have an Iron Mountain courier come and pick up the boxes.
- Once the boxes are scanned into Iron Mountain (approximately 24 - 48 hours), the information is matched in the system and you may search and place orders for that inventory.
- Only authorized users who have been provided with Inventory Maintenance access will be able to see this function on their screen. This lets them add the information from their desktop.

1. From the top menu bar, click on Add Records:

The system displays the Add Records screen.

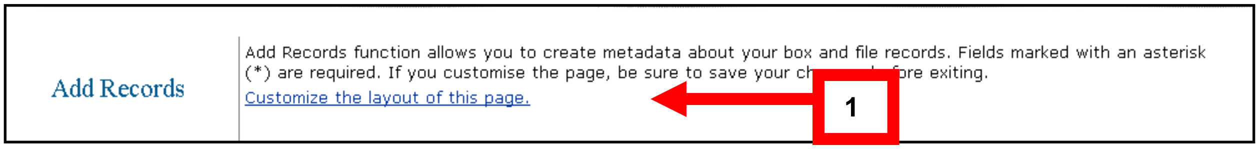
Note: The first time you access this page, you may want to choose the Customize the layout of this page hyperlink. Customize the page will allow you change the page layout and enable/disable functions that will be helpful when adding new data into the system.

The customer administrator will ensure that all required fields remain enabled by setting them as a custom field in the initial set-up.

This will prevent any of the users given access to this section the guidance on the correct fields that need to be completed when sending records and data to Iron Mountain.

Customize the Layout for Add Records

1. Click Customize the layout of this page.

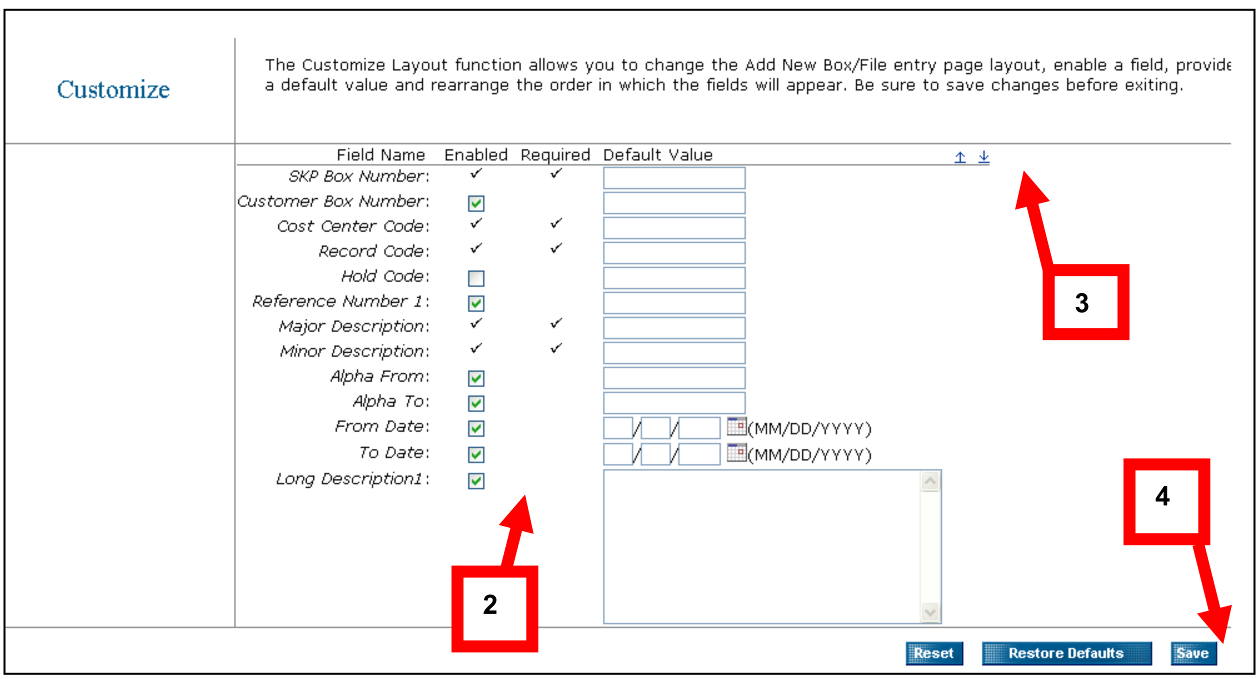


The system displays the Customize screen.

2. Select or deselect (checkbox) under Enabled column and provide a Default Value (if applicable)

3. Use the up and down arrows to rearrange the order of Enabled Functions

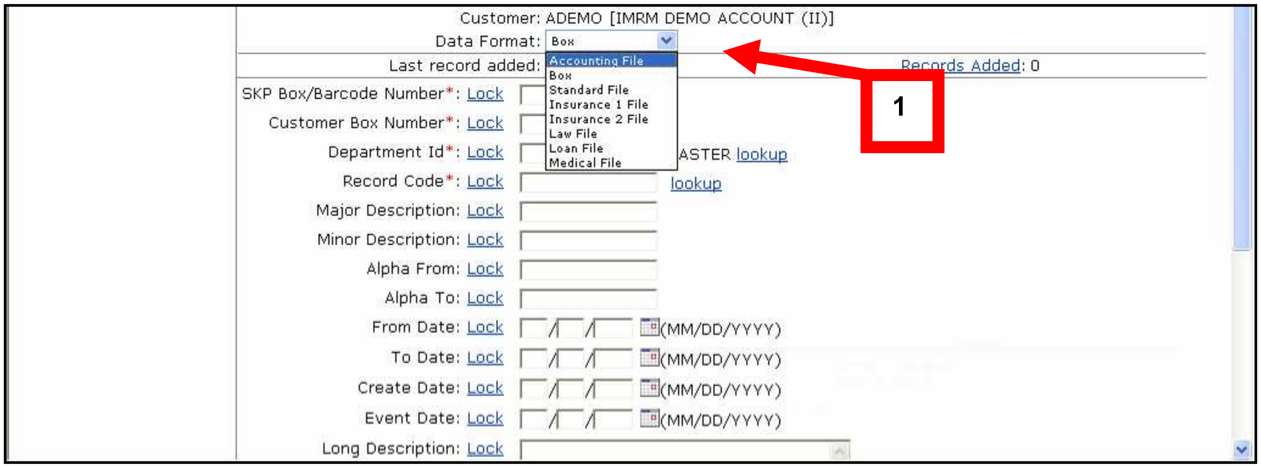
4. Click Save to save all customized changes made



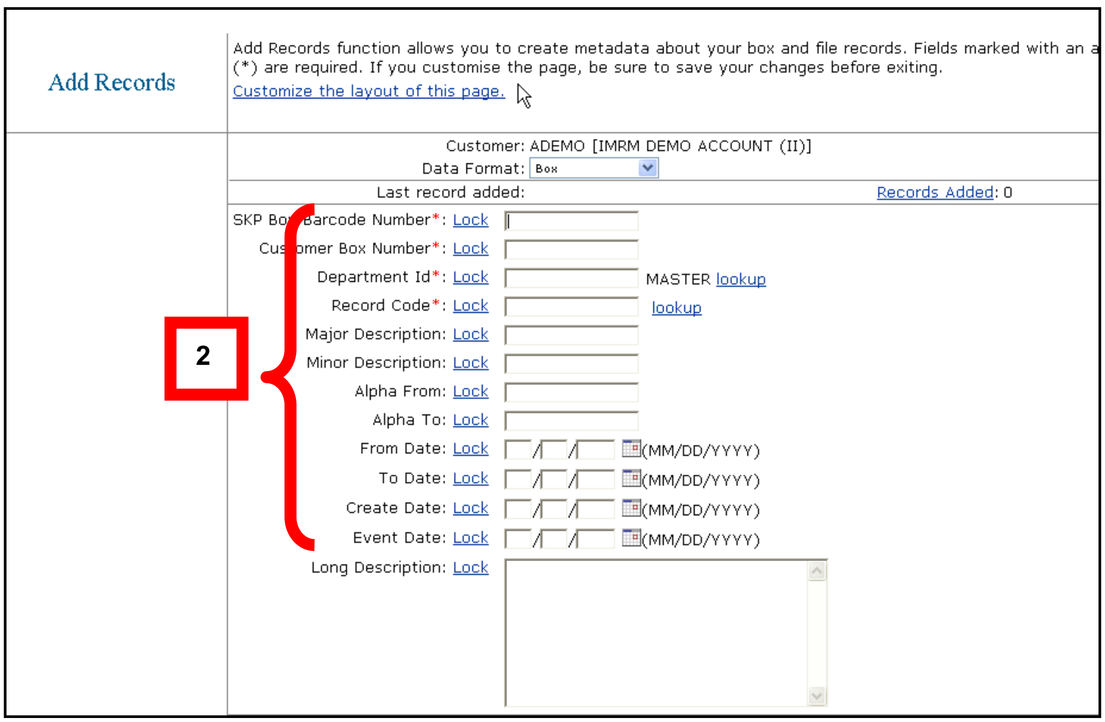
The system displays the Add New Box/File screen.

Process to Add Files/Boxes

1. Select a Data Format from the drop down list.



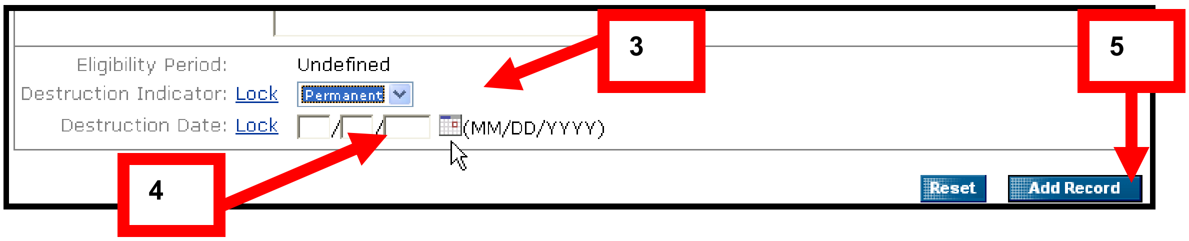
2. Once data format is selected, fill in all applicable fields. All fields with a Red Asterisk (*) are required fields:



3. Select Destruction Indicator status from the drop down list

4. Enter a Destruction Date (or click calendar icon to select date)

5. Click Add Record.

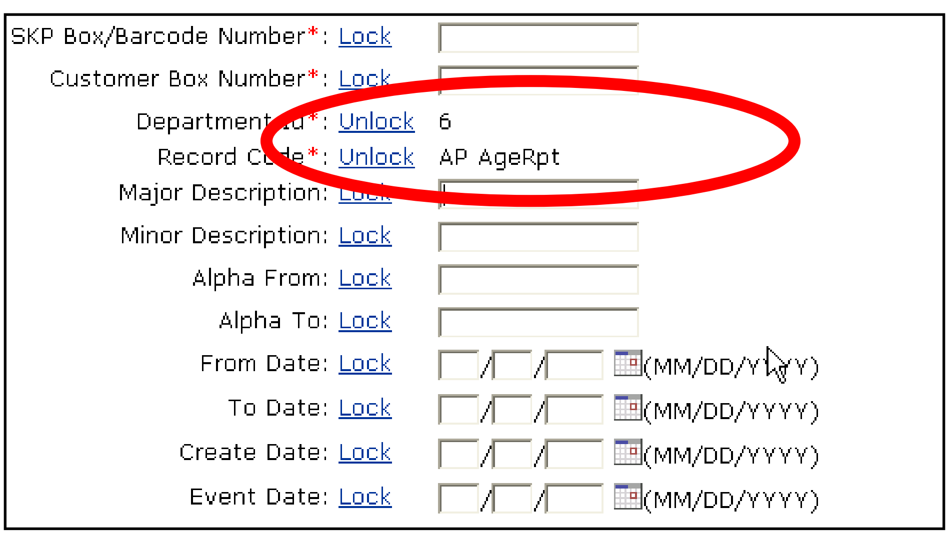


The system displays number of the Records Added confirmation screen.

Locking Fields

For quicker data entry, the system provides a feature that allows you to LOCK or UNLOCK each field as you enter your information.

The benefit is that you can "LOCK" a specific field to keep the same information as you enter multiple records. For example, you may want to lock your Department ID field because all of the records you are entering relate to the same department.



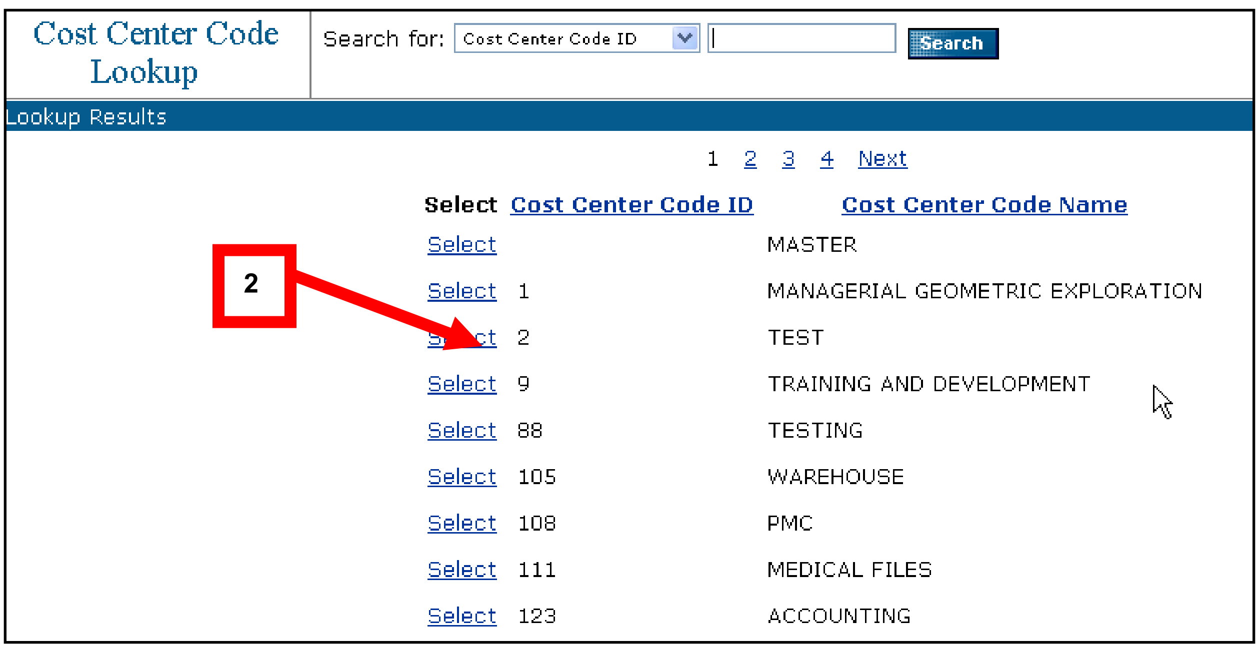
Code Lookup

When adding a new box/file to the system, you have the ability to lookup any Department IDs and Record Codes associated with the account. The following example illustrates Department ID/Cost Center.

Note: In order for this functionality to work properly, you need to be set up to validate departments within the SafeKeeperPLUS® system.

1. Click lookup:

The system displays the Department Lookup screen.



2. Click the Select hyperlink next to the desired Department ID to enter the value in the field.

Completing the Process

- Once you have entered any files or boxes to the Record Center through the Iron Mountain Connect system, you are ready to physically send your information to Iron Mountain.
- Once you have entered the information, you would proceed to the Order Function, and Create a Pick up Order.
- Inventory that has been entered via Add Records will be available after Iron Mountain scans the physical record into our SafeKeeperPLUS system and matches it to the paper work or meta data submitted.
- It takes approximately 24 - 48 hours before the records are searchable using the basic or advanced search functions within the Iron Mountain Connect system.
- However, if you need to locate the information, data in the Quick Order Entry function is available immediately for the entered record.

Viewing Data Formats

The following are data formats for each type of file.

Note: Date formats are based on the option selected in the My Profile area.

Accounting Files

Field Name	Maximum Characters	Description
SKP Box Number	11	Bar code number, provided by Iron Mountain, that identifies a box
Customer Box Number	11	Customer-defined alphanumeric identifier of the box that contains this file
Division	12	Alphanumeric identifier of the division or similar organizational unit to which the file belongs
Department	12	Alphanumeric identifier of the department or other subdivisional unit to which the file belongs
Record Code	10	Customer-defined alphanumeric code that defines a record type within a division or department and indicates how the destruction date of a file is calculated
Client Name	26	Name of the client associated with the file
Client Number	24	Customer-specified number for the client associated with the file
From Date	MM/DD/YYYY	Beginning of a customer-specified date span
To Date	MM/DD/YYYY	End of a customer-defined date span
Destruction Date	MM/DD/YYYY	Date on which the file is to be or was destroyed by Iron Mountain, based on customer instructions or calculated from the retention schedule of its record code
Alpha From	10	Beginning of a customer-defined alphanumeric sequence by which the file is classified

Boxes

Field Name	Maximum Characters	Description
SKP Box Number	11	Bar code number, provided by Iron Mountain, that identifies a box
Customer Box Number	11	Customer-defined alphanumeric identifier for the box
Division ID	12	Alphanumeric identifier of the division or similar organizational unit to which the box belongs
Department ID	12	Alphanumeric identifier of the department or other subdivisional unit to which the box belongs
Record Code	10	Customer-defined alphanumeric code that defines a record type within a division or department and indicates how the destruction date of a file is calculated
Hold Code	3	Customer-defined code that overrides the retention schedule for a box, postponing its destruction until further review
Reference Number 1	25	Additional alphanumeric identifier, typically used for legacy storage systems
Reference Number 2	25	Additional alphanumeric identifier, typically used for legacy storage systems
Major Description	30	Primary description of the box
Minor Description	30	Secondary description of the box
Alpha From	10	Beginning of a customer-defined alphanumeric sequence by which the box is classified
Alpha To	10	End of a customer-defined alphanumeric sequence by which the box is classified
From Date	MM/DD/YYYY	Beginning of a customer-specified date span
To Date	MM/DD/YYYY	End of a customer-specified date span
Create Date	MM/DD/YYYY	Date on which the box record was added to the Record Center
Event Date	MM/DD/YYYY	Date of any customer-specified event
Destruction Indicator	Select option	Reason that the destruction of the box has been put on hold.

Field Name	Maximum Characters	Description
Destruction Date	MM/DD/YYYY	Date on which the box is to be or was destroyed by Iron Mountain, based on customer instructions or calculated from the retention schedule of its record code
Long Description	2,500	Extended description of the contents of a box

Standard Files

Field Name	Maximum Characters	Description
SKP Box Number	11	Bar code number, provided by Iron Mountain, that identifies a box
Customer Box Number	11	Customer-defined alphanumeric identifier for the box
Division ID	12	Alphanumeric identifier of the division or similar organizational unit to which the box belongs
Department ID	12	Alphanumeric identifier of the department or other subdivisional unit to which the box belongs
Record Code	10	Customer-defined alphanumeric code that defines a record type within a division or department and indicates how the destruction date of a file is calculated
From Date	MM/DD/YYYY	Beginning of a customer-defined date span
To Date	MM/DD/YYYY	End of a customer-defined date span
File Description 1	30	Primary description of the file and its contents
File Description 2	30	Secondary description of a file and its contents
File Description 3	30	Tertiary description of a file and its contents
File Description 4	80	Final description of a file and its contents
Destruction Date	MM/DD/YYYY	Date on which the file is to be or was destroyed by Iron Mountain, based on customer instructions or calculated from the retention schedule of its record code
Create Date	MM/DD/YYYY	Date on which the file was added to the Record Center

Field Name	Maximum Characters	Description
Birth Date	MM/DD/YYYY	Date of the person documented in the file
Discharge Date	MM/DD/YYYY	Date of discharge from a health care or other facility of the person documented in the file
Social Security Number	Nnnnnnnnn	U.S. Social Security Number of the person documented in the file (do not use dashes)
Alpha From	10	Beginning of a customer-defined alphanumeric sequence by which the file is classified
Alpha To	10	End of a customer-defined alphanumeric sequence by which the file is classified

Insurance Files (Type 1 for Claims & Policies)

Field Name	Maximum Characters	Description
SKP Box Number	11	Bar code number, provided by Iron Mountain, that identifies a box
Customer Box Number	11	Customer-defined alphanumeric identifier for the box
Claim/Policy	15	Customer-defined alphanumeric identifier of the claim or policy
Office	6	Alphanumeric identifier of the office from which the claim or policy originates or is associated
Symbol	4	Alphabetic identifier preceding the policy number that identifies the type of insurance (e.g. WC for Workers Compensation)
Name	35	Name of the claim or policy holder
Expiration Year	2	Two-digit designation of the year in which the claim or policy expires
Type	3	Alphanumeric identifier for the business coverage category (e.g. Fire or Commercial Package insurance)

Field Name	Maximum Characters	Description
EIS	2	Alphanumeric identifier for the type of claim or policy generated by an Electronic Insurance System (e.g. G2 for General Liability)
Destruction Date	MM/DD/YYYY	Date on which the file is to be or was destroyed by Iron Mountain, based on customer instructions or calculated from the retention schedule of its record code
Alpha From	10	Beginning of a customer-defined alphanumeric sequence by which the file is classified
Alpha To	10	End of a customer-defined alphanumeric sequence by which the file is classified
Claim/Policy Indicator	1	Single letter or digit indicating whether this is a claim or policy file

Insurance Files (Type 2 for Claimants)

Field Name	Maximum Characters	Description
SKP Box Number	11	Bar code number, provided by Iron Mountain, that identifies a box
Customer Box Number	11	Customer-defined alphanumeric identifier for the box
Insured Name	35	Name of the insured party
Claimant Name	35	Name of the claimant
Loss Date	MM/DD/YYYY	Date on which the loss related to the claimant occurred
CCL	7	Alphanumeric identifier of the Claim Class Letter for the claim or policy
Destruction Date	MM/DD/YYYY	Date on which the file is to be or was destroyed by Iron Mountain, based on customer instructions or calculated from the retention schedule of its record code
Alpha From	10	Beginning of a customer-defined alphanumeric sequence by which the file is classified

Field Name	Maximum Characters	Description
Alpha To	10	End of a customer-defined alphanumeric sequence by which the file is classified

Legal Files

Field Name	Maximum Characters	Description
SKP Box Number	11	Bar code number, provided by Iron Mountain, that identifies a box
Customer Box Number	11	Customer-defined alphanumeric identifier for the box
Lawyer 1	4	Customer-defined alphanumeric code for the primary lawyer handling the case
Lawyer 2	4	Customer-defined alphanumeric code for another lawyer handing the case
Client Name	30	Name of the client of the case
Client Number	10	Customer-defined alphanumeric code for the client of the case
Matter Number	12	Customer-defined number identifying the legal matter
Letter	1	Single alphabetic letter used to organize this file in relation to other files
Sub Number	3	Customer-defined secondary number identifying the legal matter
Matter Description	45	Description of the case of legal matter
Close Date	MM/DD/YYYY	Date on which the legal matter was closed, if applicable
Number of Files	2	Number of files that are a part of this legal matter
Type	3	
Destruction Date	MM/DD/YYYY	Date on which the file is to be or was destroyed by Iron Mountain, based on customer instructions or calculated from the retention schedule of its record code

Field Name	Maximum Characters	Description
Alpha From	10	Beginning of a customer-defined alphanumeric sequence by which the file is classified
Alpha To	10	End of a customer-defined alphanumeric sequence by which the file is classified

Loan Files

Field Name	Maximum Characters	Description
SKP Box Number	11	Bar code number, provided by Iron Mountain, that identifies a box
Customer Box Number	11	Customer-defined alphanumeric identifier for the box
Loan Number	15	Customer-defined alphanumeric identifier for the loan
Old Loan Number	15	Customer-defined alphanumeric identifier previously applied to the loan
Borrower Name	26	Name of the borrower of the loan
Cost Center	5	Customer-defined alphanumeric code assigning the loan service costs to a cost center
File Type	1	Single letter or digit code used to organize this file in relation to other files
Acquisition Code	3	Alphanumeric code for a group of loans purchased from another financial institution
Destruction Date	MM/DD/YYYY	Date on which the file is to be or was destroyed by Iron Mountain, based on customer instructions or calculated from the retention schedule of its record code
Alpha From	10	Beginning of a customer-defined alphanumeric sequence by which the file is classified
Alpha To	10	End of a customer-defined alphanumeric sequence by which the file is classified

Medical Files

Field Name	Maximum Characters	Description
SKP Box Number	11	Bar code number, provided by Iron Mountain, that identifies a box
Customer Box Number	11	Customer-defined alphanumeric identifier for the box
Patient Number	9	Customer-defined alphanumeric identifier for the patient whose care is documented by the file
Birth Date	MM/DD/YYYY	Date of birth of the patient
First Name	12	First name of the patient
Last Name	14	Last name of the patient
Entry Year	2	Last two digits of the year that the patient entered treatment at the applicable office or health care facility
Destruction Date	MM/DD/YYYY	Date on which the file is to be or was destroyed by Iron Mountain, based on customer instructions or calculated from the retention schedule of its record code
Alpha From	10	Beginning of a customer-defined alphanumeric sequence by which the file is classified
Alpha To	10	End of a customer-defined alphanumeric sequence by which the file is classified

Module Five: Setting Preferences in the Record Center

There are two functions available from the Preferences menu: General Preferences and Search Preferences that can be set by each individual user.

- General Preferences specify the default search method, delivery method, and quick order entry for your Record Center sessions.
- Search Preferences include settings that limit your searches to selected organizations, record types, record statuses, and other criteria.

General Preferences

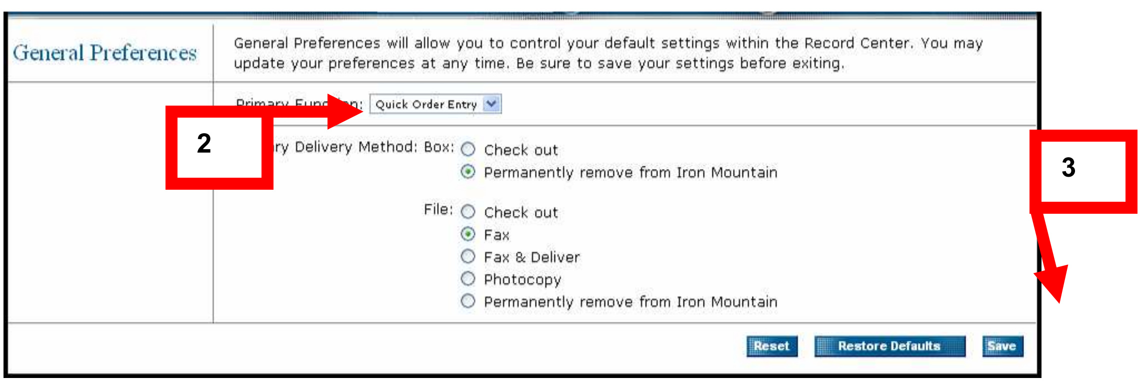
1. Click Preferences and select General Preferences:

The system displays the General Preferences screen.

2. Click/select from the following:

- Select a Primary Function (a menu option) from the drop down list.
- Select one of the Primary Delivery Method radio buttons.
- Select a File status option from the checklist.

3. Click Save



Note: The options available depend on privileges granted according to your security status.

Search Preferences

1. Click Preferences and select Search Preferences:

The system displays the Search Preferences screen.

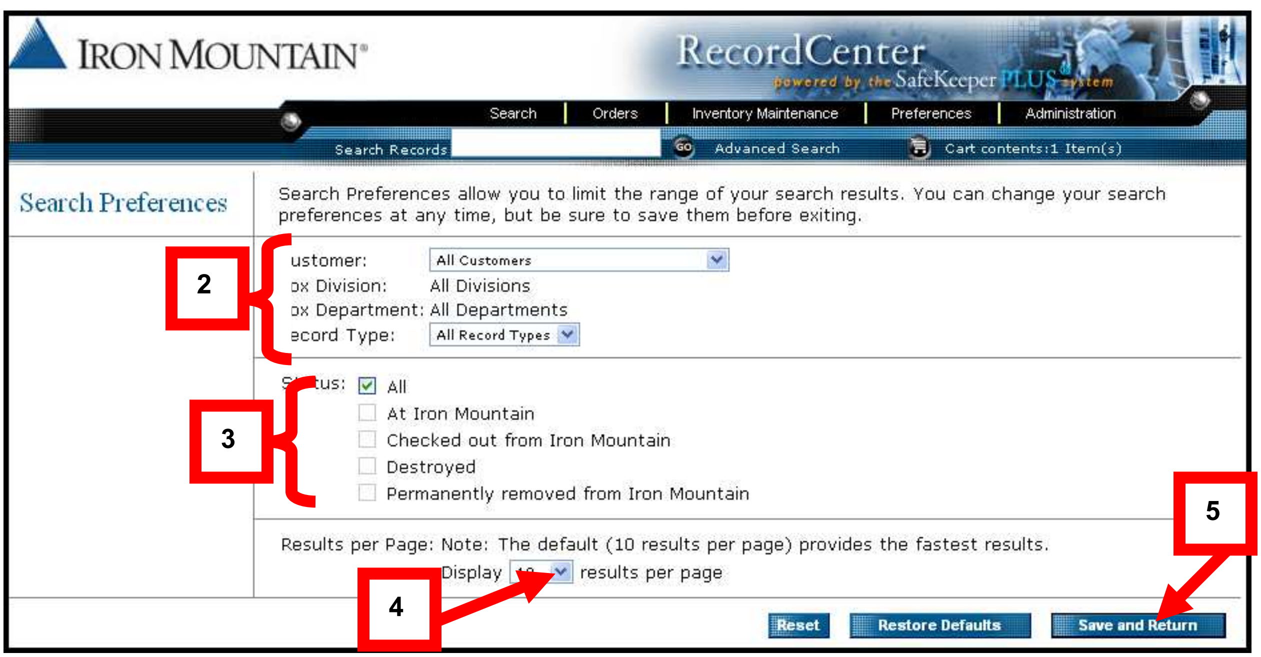
2. Select the desired item from each of the following drop down lists:

   - Customer
   - Box Division
   - Box Department
   - Record Type

3. Check the desired Status for your search

4. Click in Display box and select number of results per page

5. Click Save and Return



Note: The options available depend on your security level.

Module Six: The Report Center

Reporting

There are four different report categories available within the Iron Mountain Connect™ system; Activity, Inventory, Retention, and Financial.

- Within each of the categories you can access additional reports that assist you with budgeting, forecasting, and general information regarding your records management information.
- Reports are available in different formats; CSV, PDF, and XML. Reports are available within approximately two business days from the time ordered and will be automatically posted on your homepage in the Report Center section. Reports will remain posted for approximately 30 days and then automatically removed.
- If you would like to keep the report permanently, right click on it and save it. If you do not see the report you would like, contact your Account Manager or Iron Mountain directly; they can work with you to customize a report specific to your needs.
- All reports are free of charge.

The following are the four main report categories, their description and number of reports available under each category.

Report Category	Description	Number of Available Reports
Activity	User data, participation analysis, and activity history	6
Inventory	Snapshots and historic details of carton and file inventory, and other settings	11
Retention	Detailed and summary information related to records classification, retention schedules, hold codes, and destruction eligibility	5
Financial	Summary activity and projected forecasts, invoice history, and activity tied to dollars spent	1

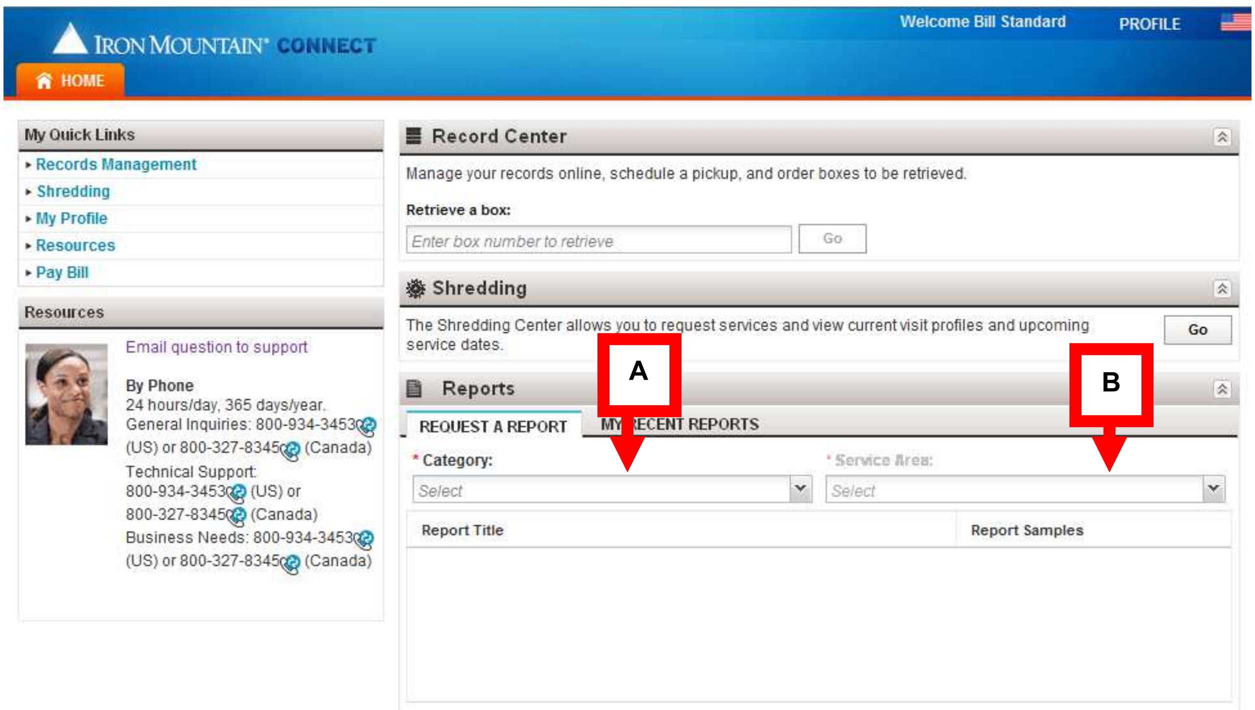
Request a Report

Iron Mountain Connect™ Report Center allows users to order or view reports right from the Home:

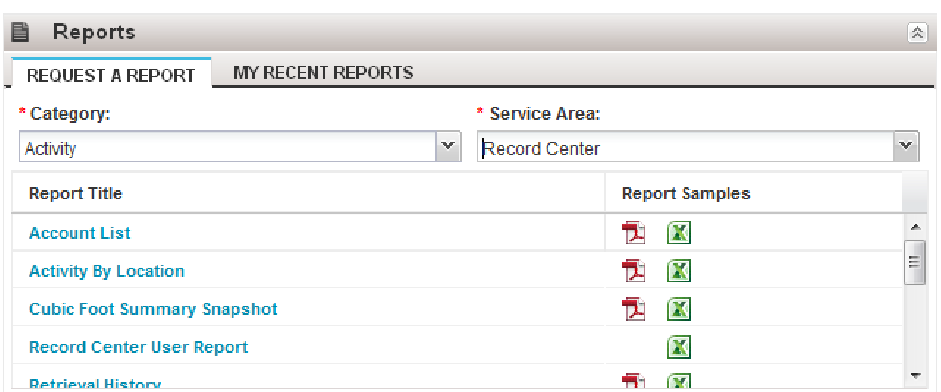
1. To request a report:

A. Select the Report Category

B. Select the Service are



Available reports for the category will display. You can view report samples if you are unsure which report to choose.

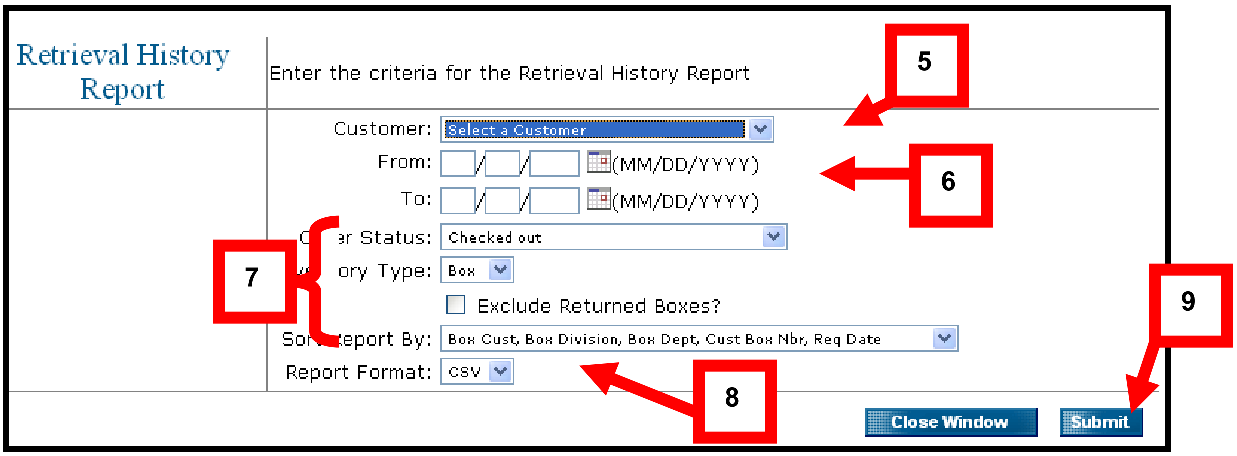


2. Select the report you wish to order by clicking on the report title. The following will use the Retrieval History Report as an example.

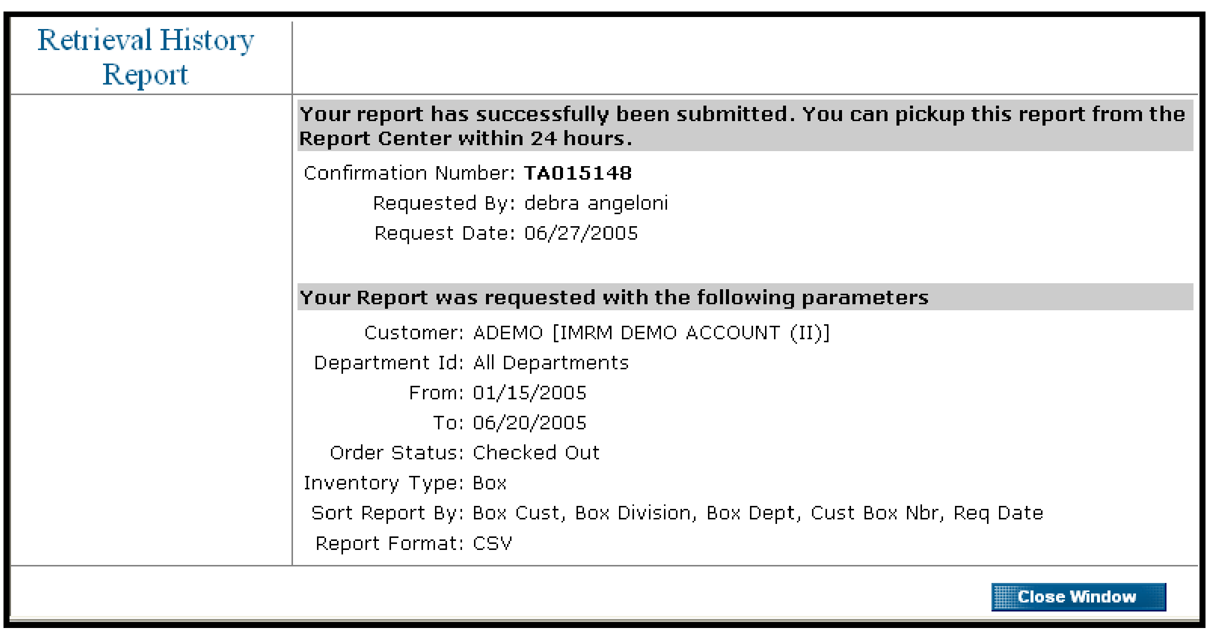
3. A new window will open where you specify the report criteria and submit your request

- Select a Customer ID, division and/or Account from the drop down list.
- Type date in the From/To boxes, or click on the calendar icon and select dates
- Select any other criteria applicable to report requested
- Select Report Format from the drop down list: .pdf, cvs (Excel worksheet) or .xml (see sample for a Retrieval History Report below)

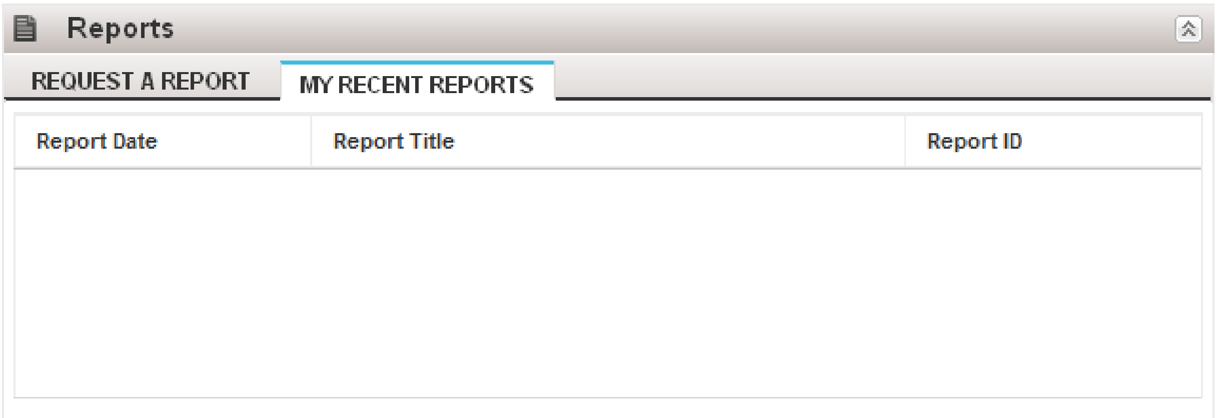
4. Click Submit.



The system displays the Report Confirmation screen.



After requesting the report, you will receive an email notification when the report is available. To access the report, return to the Report Center on the Iron Mountain Connect Home page; your report will be available under the My Recent Reports tab.



Note: reports are available in the Report Center for 30 days only at which time they will be deleted. To retain a report, save it to a local or network drive on your computer.

The Following table lists the available Records Management reports for each category.

Type of Report	Report Name	Description
Activity Report	Account List	Volume and contact information for active Iron Mountain accounts
	Activity by Location	Summary of ordering activity by location, quantity and order type
	Cubic Foot Summary Snapshot	Summary of box information including type, description, quantity and cubic footage
	Record Center User Report	Displays all Record Center users who can access the selected Customer/Division/Department. Displays access points for the user and the associated privileges
	Retrieval History	Activity history for outcarded, permanently withdrawn and destroyed inventory
	Storage Growth Analysis	Detailed storage breakdown with inventory growth analysis
Retention Report	Destruction Eligibility Forecast	Forecast of carton volumes eligible for destruction review; highlights the number of cartons without assigned destruction review dates. Provides a planning tool that allows destruction program analysis and forecast destruction expenditures

Type of Report	Report Name	Description
	Destruction Eligibility List	List of all cartons stored with Iron Mountain that are eligible for destruction review as of report request date
	Held Carton Summary	Summary of all records with a current hold status, including both hold codes and destruction indicators
	Record Classification List	List of record classes set up in SafeKeeperPLUS and their associated settings
	Record Classification Summary	Detailed summary of your record classes and the quantity of cartons associated with each
Inventory Report	Accounting File Inventory	Detailed review of active accounting files and their associated descriptive information
	Carton Date Summary	Carton quantities by year for each of the dates associated with carton inventory
	Carton Descriptive Details	Detailed list of descriptive data in SafeKeeperPLUS.
	Carton Inventory	Current inventory report for all cartons stored with Iron Mountain
	File Inventory	Detailed review of active files and their associated descriptive information
	Insurance File 1	Detailed review of active insurance files and their associated descriptive information
	Insurance File 2	Detailed review of all active insurance files and their associated description information
	Inventory Ownership Summary	Detailed review of the quantity of carton and files for division and department
	Law File Inventory	Detailed review of active law files and their associated descriptive information
	Loan File Inventory	Detailed review of active loan files and their associated descriptive information
	Medical File Inventory	Detailed review of active medical files and their associated descriptive information
Financial Report	Cost and Activity	Billing activity for specified invoice period

Module Seven: Administrator Functionality

There are two different administrator roles within Iron Mountain Connect. Your company may want to assign one or more individuals with Administrator privileges.

A definition of each administrator is listed below. Administrators have special security privileges, therefore; Iron Mountain recommends keeping the number of administrators to a minimum.

All administrator privileges assigned to Iron Mountain Connect users must be approved by your company's authorized administrator.

Client User Administrators: These administrators have the following privileges:

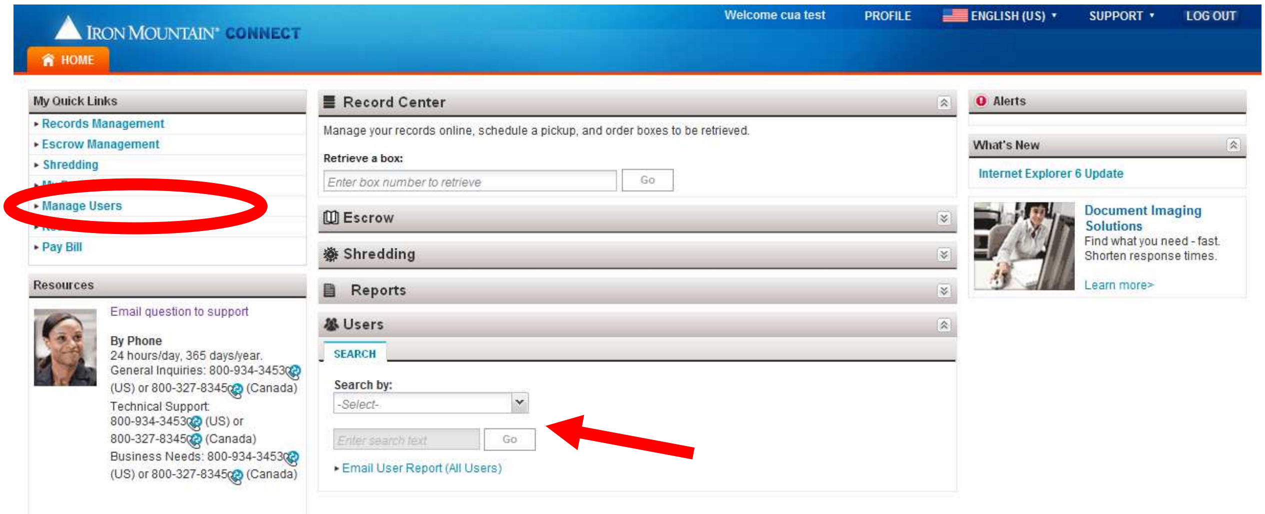
- View content
- Access to the Records Center
- Create or modify the end user
- Create or modify the User Administrator
- Create or modify the Content Administrator
- If the Client User Administrator has an assigned business group, he or she can only add or edit users in that specific business group

Client Content Administrators: These administrators have the following privileges:

- View content
- Access the Records Center
- Upload client content

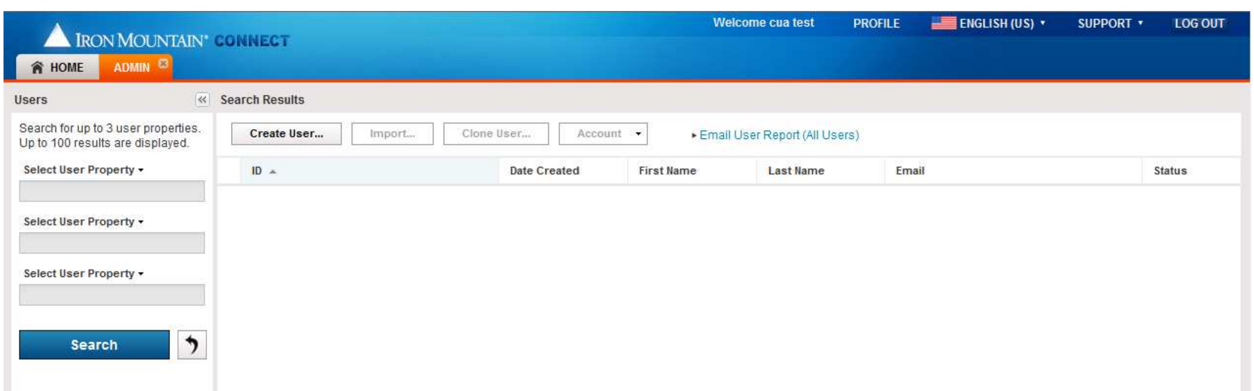
Client User Administrator

Go to the Homepage and click on the Manage Users quick link or the Users portlet, where you can quickly enter your search criteria and click Go to find the user account you wish to manage.



You will be brought to the Admin tab, where you can:

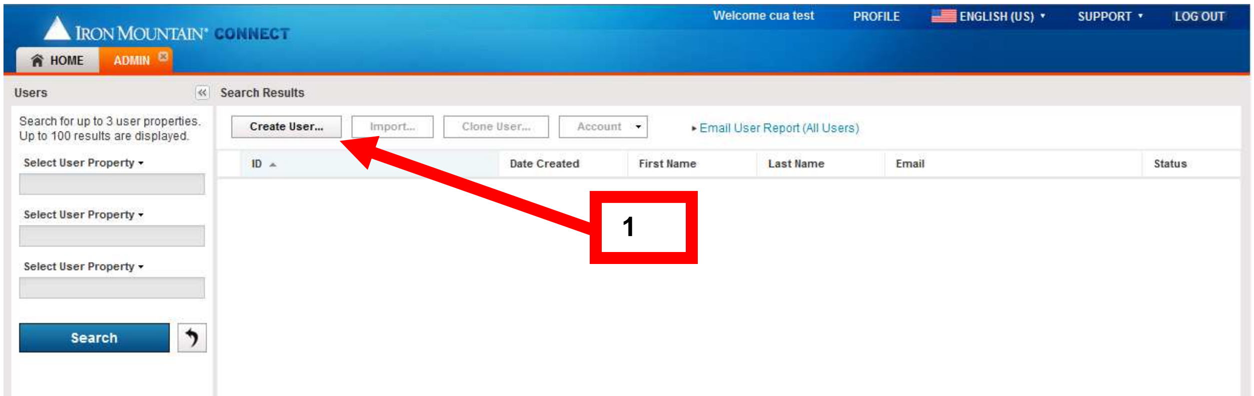
- Modify an existing user
- Create a new user



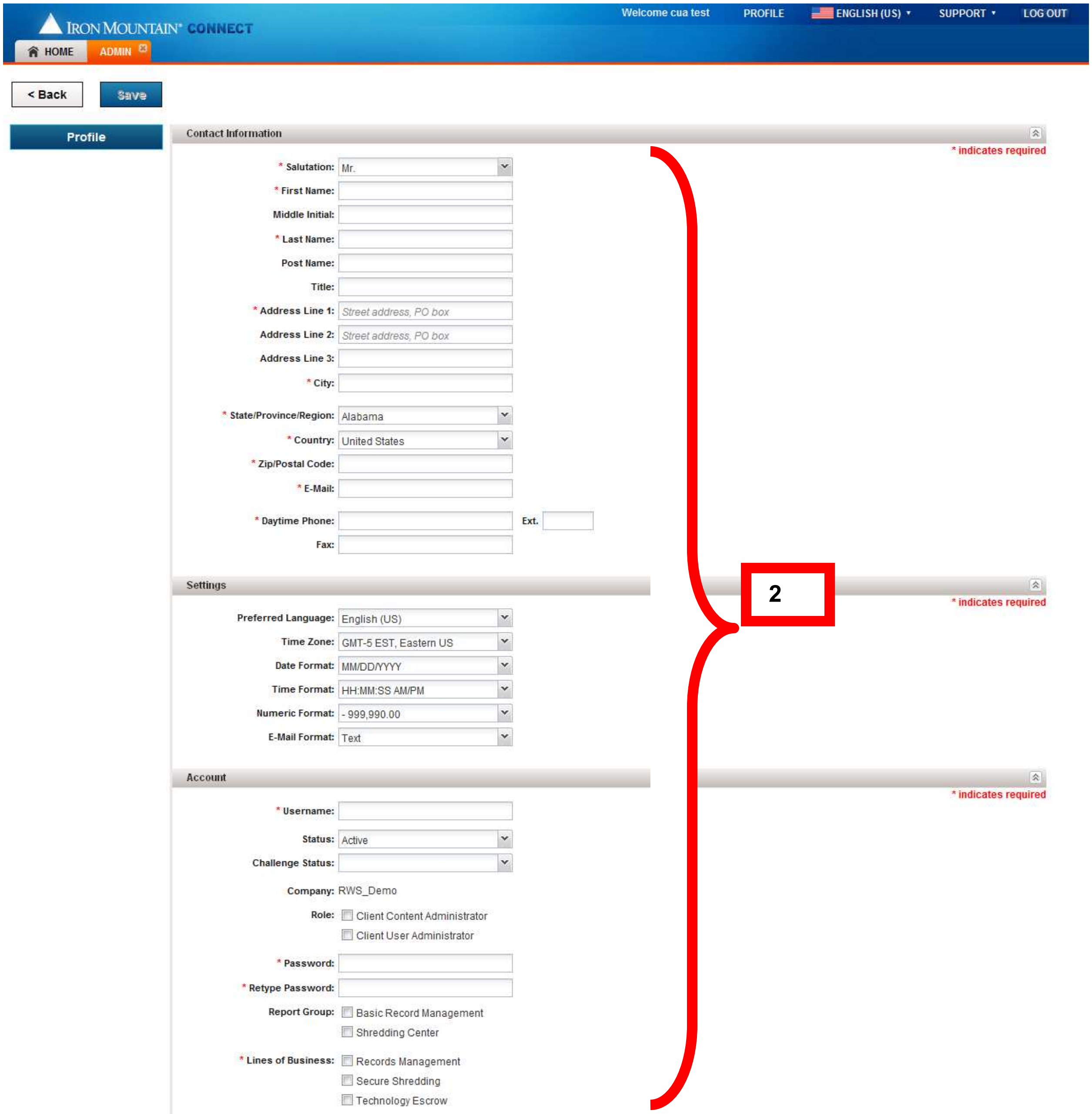
Create a New User and Set up Profiles

To create a new user and set up profiles, follow these steps:

1. Click on Create a New User:



The system displays the Create a new user screen.



2. Fill out all general profile required fields (*) and click Save at the top of the page.

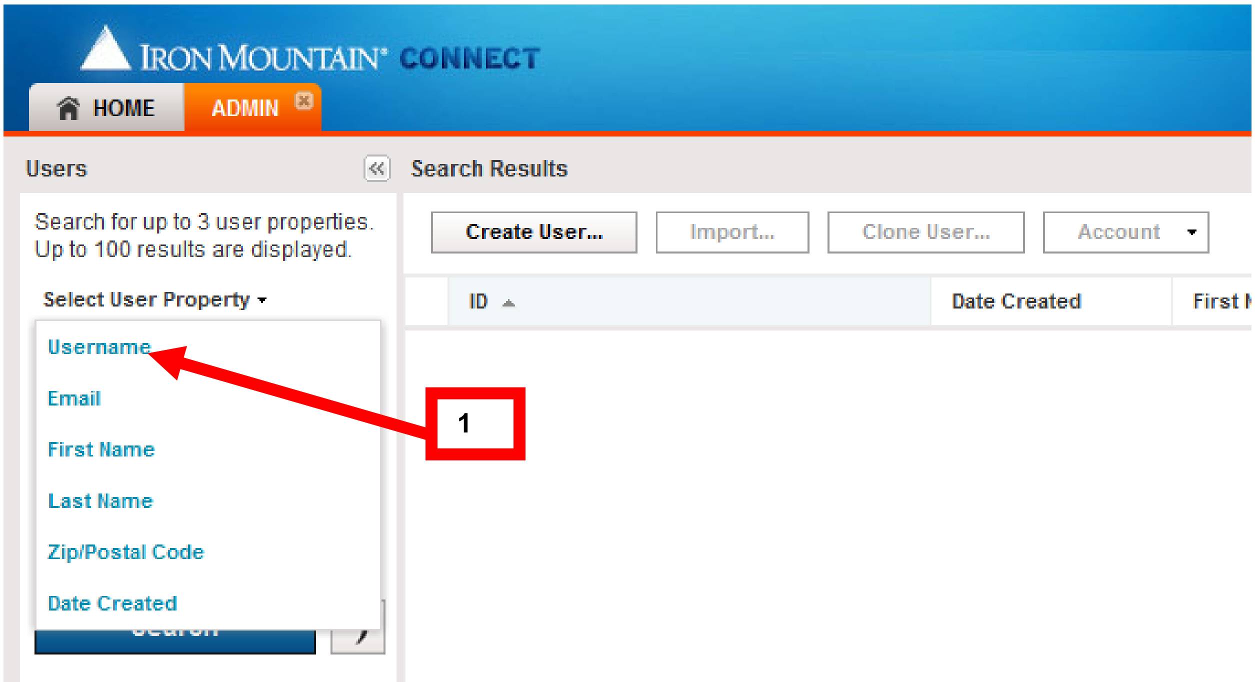
Note: If you enter a username that has already been used, the system will automatically generate a username by appending a number to the one you originally entered. The system will display a message noting the change.

If all fields have been completed properly, a message will display that you have successfully created a new user.

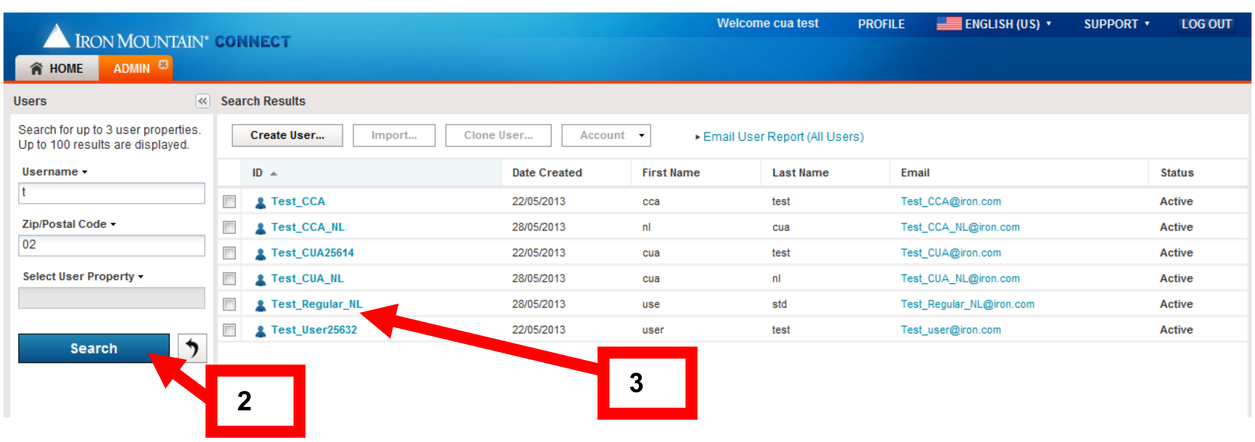
Once the user account has been created, the administrator will need to search for the new user to grant o the appropriate Line of business permissions for access to Record Center (See Modify an Existing User below)

Search For and Modify Existing User

1. In order to view or modify an existing user, search for the user by selecting up to three properties.



2. Click Search.

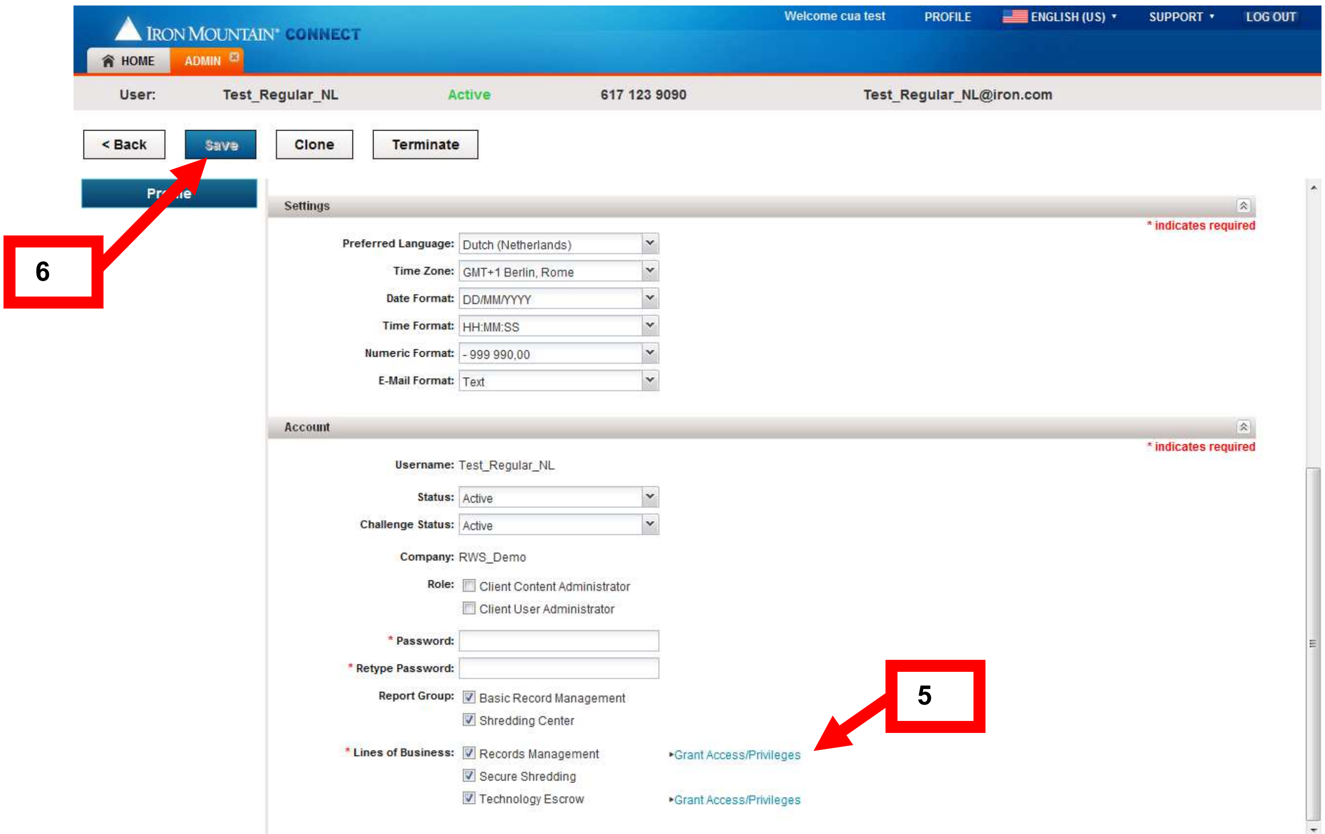


The search results will be displayed on the right hand side of the screen.

3. Select the user to be modified.

The screen that appears is the same that appears when creating a new user.

4. Enter or modify applicable fields. The sections at the bottom set permissions for the Report Groups and Lines of Business to which the user will have access. See the table below for a list of the options available.



5. If the user has not yet been assigned privileges for the Lines of Business they have been set up for, click on Grant Access/Priviledges. A new window will open where you can select the priviledges and access you wish to grant the user.

5. Click Save.

Note: If an administrator changed a user's password, the user will be prompted to reset his password on the next login.

See the table below for a summary of fields for setting up and modifying a user:

General Profile Information Summary

Label	Description	Required?
Salutation	Select Dr., Mr., Ms. or Mrs.	Yes
Last Name	User's last name – must be a person's name	Yes
First Name	User's first name – must be a person's name	Yes
Username	The user's username; this cannot be changed later	Yes
User Status	Select Active or Terminated Check the applications for which the user will be authorized	Yes
Password	The user's password	Yes
Retype password	Confirm password	Yes
E-mail	The user's e-mail address – must be a valid, unique e-mail address	Yes
E-mail format preference	Text or html	No
Daytime phone	The user's phone number	No
Fax	The user's fax number	No
Address (1st line)	The user's first address line	Yes
Address (2nd line)	The user's second address line	No
Address (3rd line)	The user's third address line	No
City	The user's city	Yes
State	The user's state (if outside the U.S., please select a different country in the Country dropdown)	Yes
Country	The user's country	Yes
Zip Code	The user's zip code	Yes
Preferred Language	Select from the drop down list (defaults to American English)	Yes

Time Zone	Select from the drop down list	No
Date Format	Select from the drop down list	No
Numeric Format	Select from the drop down list	
Report Groups	Select the report groups the user should be able to request from the Available report groups box and click Add:	No
Lines of Business	Select the lines of business to which the user will have access and click Add :	No
Application Portlets	Select the application portlets to which the user will be able to upload or delete content and click Add:	No

Password Lockout Rules

The first time new users access IM Connect, they will be required to change their passwords and create 5 security/challenge questions from a list of 10 available questions. If they forget their password or get locked out of the system, 3 of the 5 questions will be randomly chosen for response to unlock the user.

After 3 unsuccessful attempts to access an account, the account will be locked for 5 minutes. The user can then use the “Forgot Password” function to access his account and answer the challenge questions.

Once the challenge questions have been successfully answered, an email will be sent to the user’s registered address with a temporary password that must be changed at the next log-in.

The username will unlock in approximately 5 minutes.

After each lockout, a user needs to wait 5 minutes to attempt entry. However, after one set of lockouts, the account will lock after only one unsuccessful attempt and the user will have to wait 5 minutes before another attempt. For this reason, it is better to use the “Forgot Password” function rather than making attempt after attempt to remember a password.

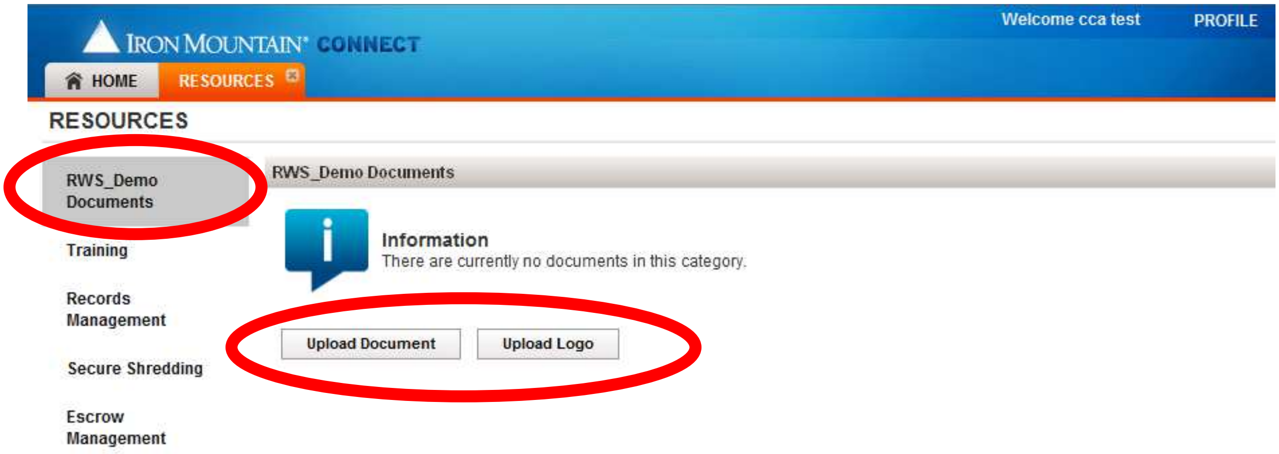
Client Content Administrator

Adding/Uploading Logos

Client Content Administrators may upload a company logo or other documents on the Resources tab.

Access the Resources tab from the quick links on the IMConnect Home page

As a CCA, the Upload Document and Upload Logo options are available on the resources tab



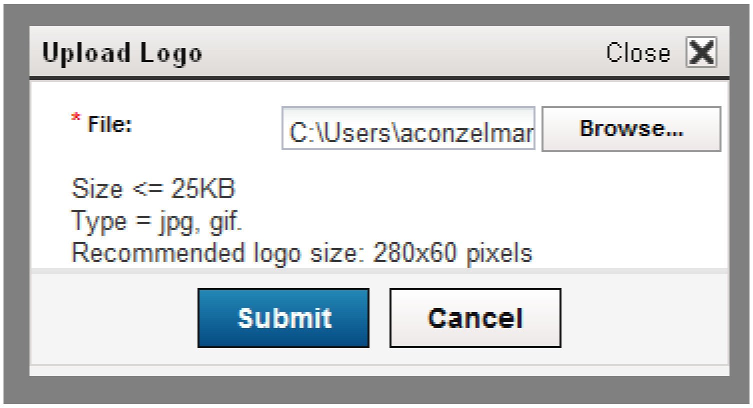
Note: Only one Logo can be uploaded for your company. It will display to all users of the company.

All documents uploaded (max 25) will also be visible to all users under the company specific tab, which users will see by default when accessing Resources if content has been provided.

The Training and Line of Business tabs are populated by Iron Mountain and cannot be edited by the Customer Content Administrator.

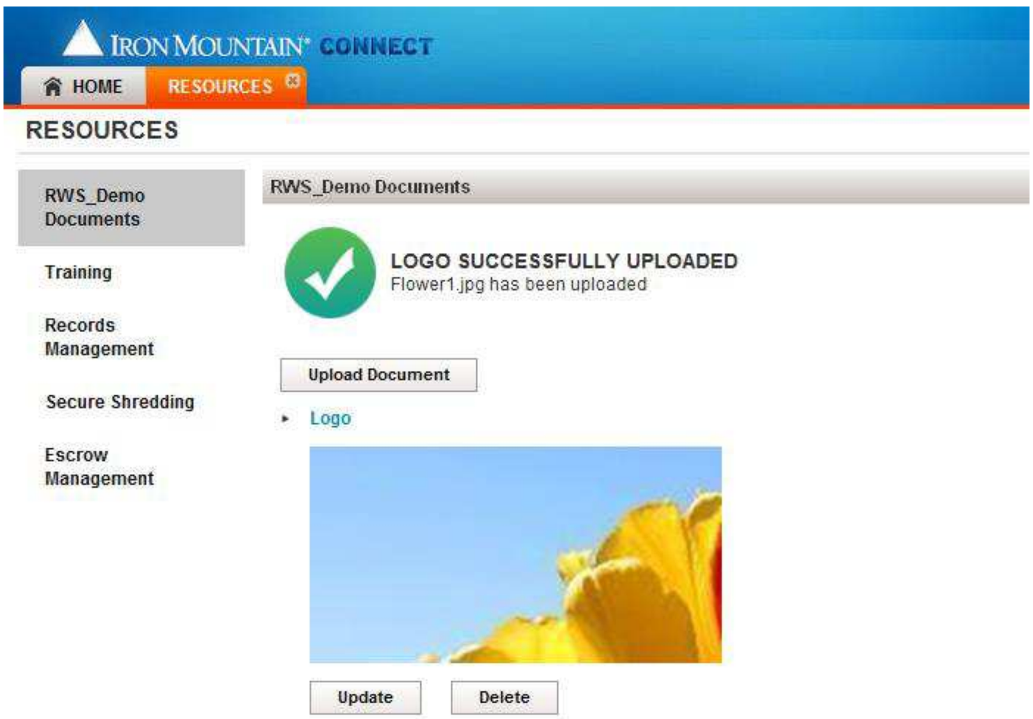
To Upload a Logo

1. Click Upload Logo



2. Select the logo file and click Submit

3. A success message displays and the logo appears on the Resources tab (for CCAs only, please view the resources tab below for an example of the view Standard users and CUAs will have).

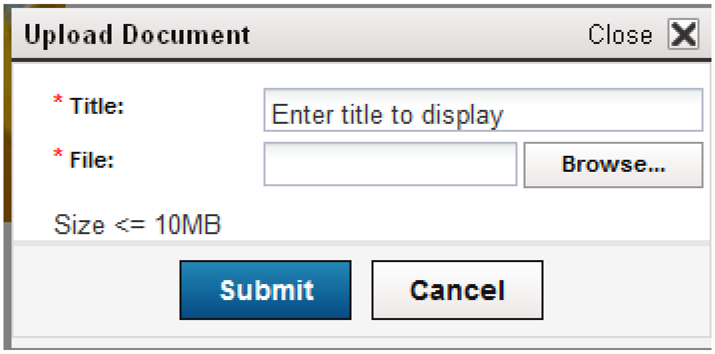


4. The logo can be updated or deleted by selecting the appropriate action below the logo image.

Note: Logo Upload is no longer available as an option until the current logo is deleted, as only one logo can be displayed to all users.

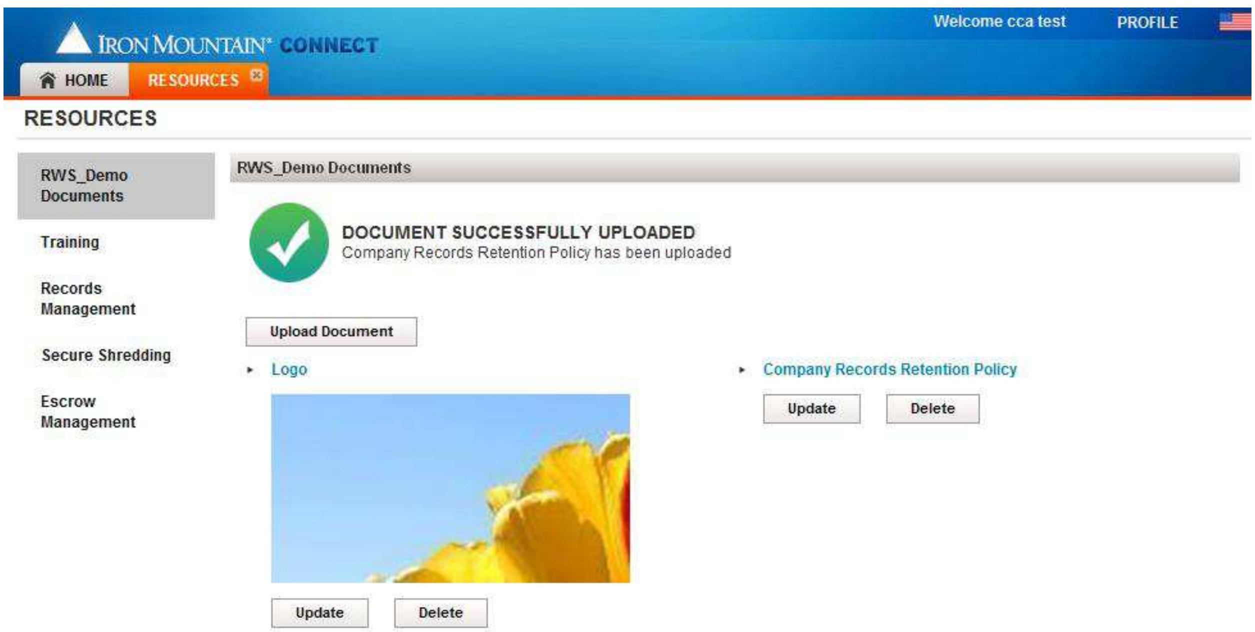
To Upload a Document

1. Click Upload Document on the Resources tab



2. Enter a title for the document and select the file to be uploaded.

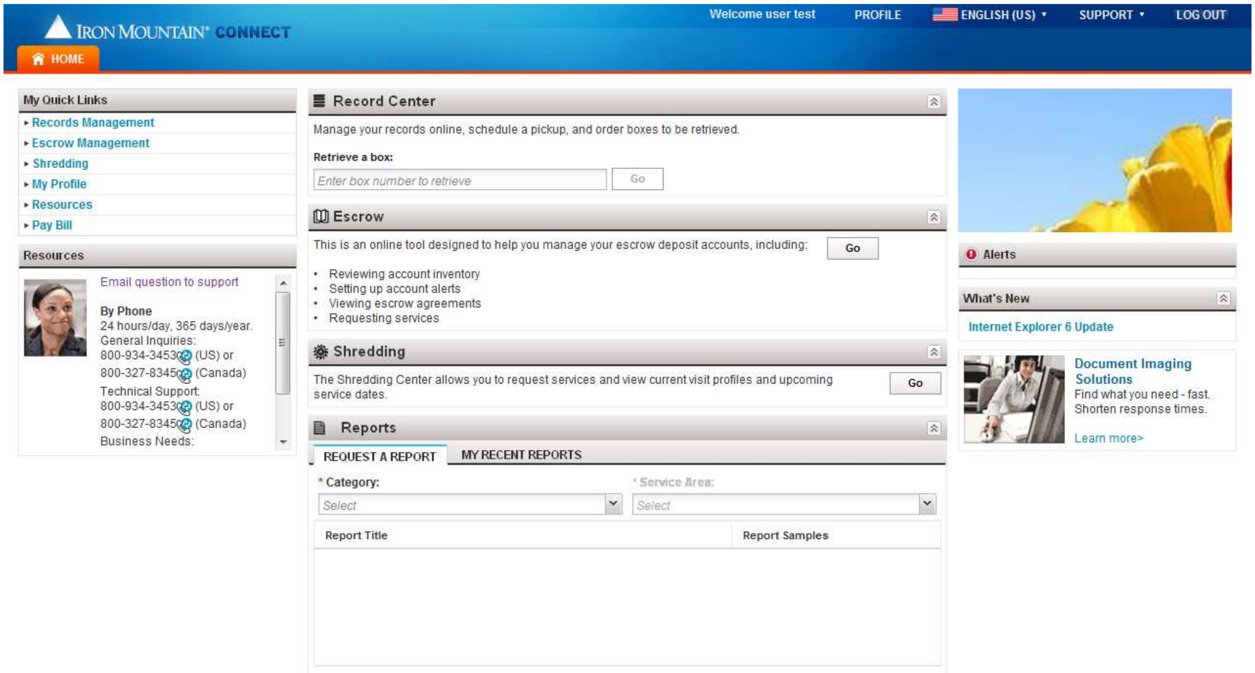
3. Click Submit to complete the upload.

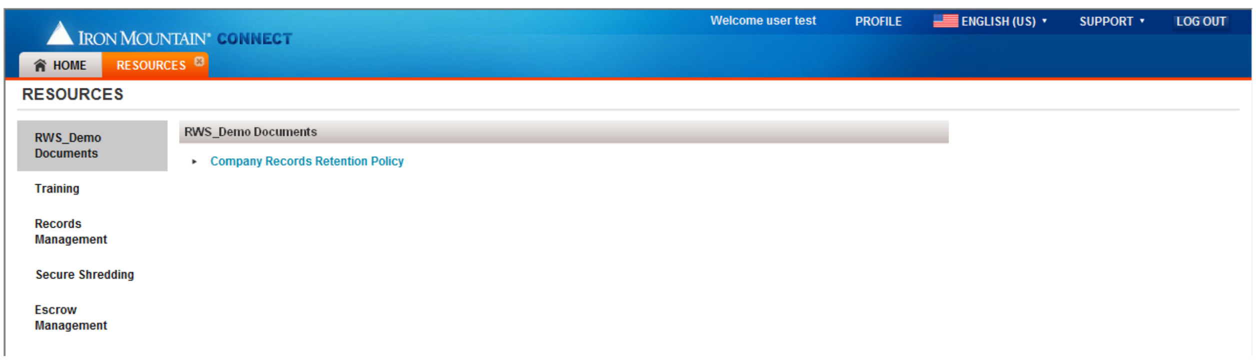


4. A success message displays and the document appears on the Resources tab.

5. The document can be updated or deleted by selecting the appropriate action below the document title (for CCAs only, please view the resources tab below for an example of the view Standard users and CUAs will have).

Example: Iron Mountain Connect Home Page & Resources tab with Customer content uploaded





Administering the Records Center

Within the Record Center, there is an administrative component for setting permissions for specific activity within IM Connect.

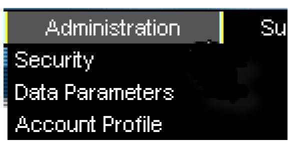
Viewing Your User Profile

The User Profile screen displays the functions and organizations to which you are granted access (in the Record Center).

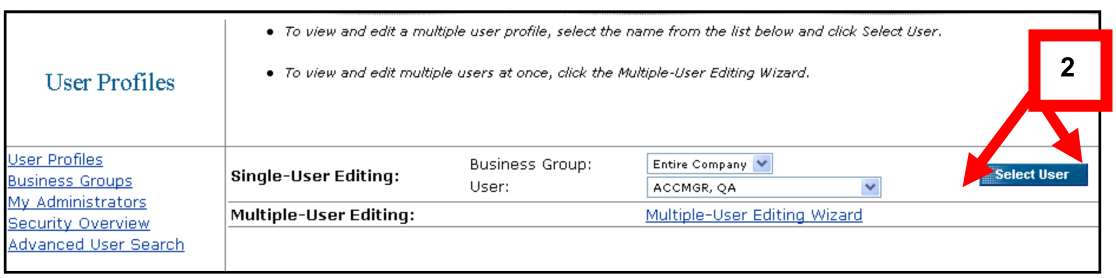
Note: Standard Users can view their own profiles only. IMC Administrators can view and edit the profiles of all Administrators and Users in the enterprise (Iron Mountain customer). Business Group Administrators can view and edit the profiles of Business Group Administrators and Users in their Business Groups.

To view your User Profile, follow these steps:

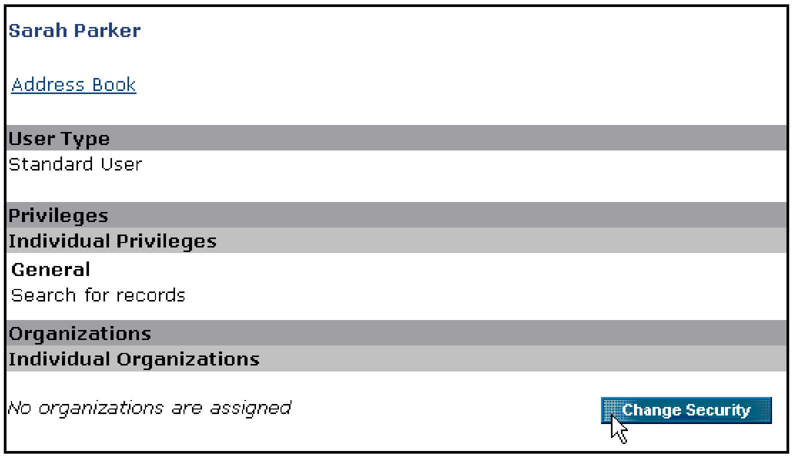
1. Click Administration and select Security from the drop down menu



2. From the User Profiles screen, click Select User or search for a user from the drop down list.



The system displays your current User Type, Privileges, and Organizations.


Sarah Parker
Address Book
User Type
Standard User
Privileges
Individual Privileges
General
Search for records
Organizations
Individual Organizations
No organizations are assigned
Change Security

Editing User Profiles

You can edit single user and multiple users' profiles.

- Enterprise Administrators are authorized to edit User Profiles of Business Groups, Business Group Administrators, other Enterprise Administrators, and all Standard Users.
- Business Group Administrators are authorized to edit User Profiles of Business Group Administrators and Standard Users within their own Business Groups only.

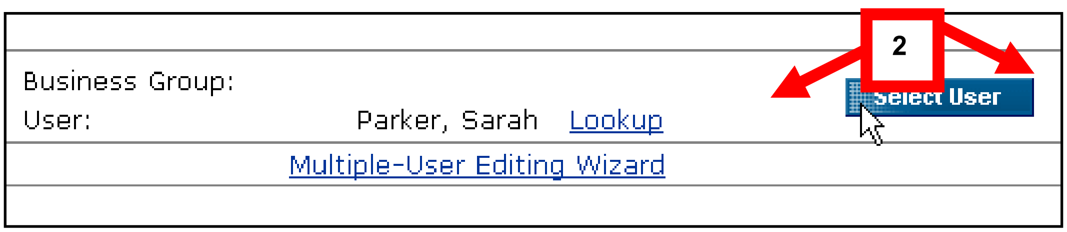
To edit single User Profiles:

1. Click Administration and select Security from the Administration drop down menu

The system displays the User Profiles screen.

2. Click Lookup to display the User Lookup screen.

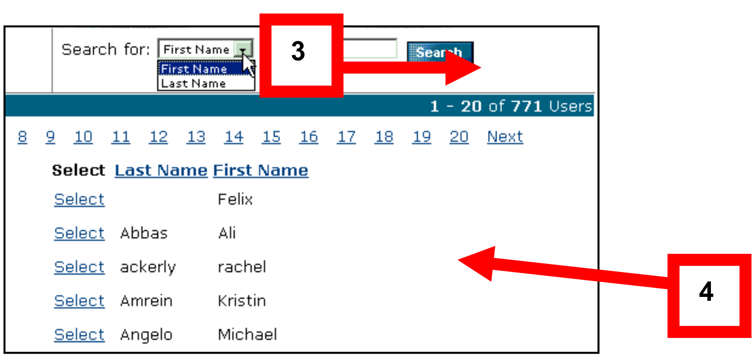
Note: if the correct name is already displayed, click Select User to bypass steps 3 and 4.



3. Select First Name or Last Name in Search For box, type the name in the Search box, and click Search.

4. Click Select next to the user name requested

Note: You can also click the page number links or the Next link to scroll through user names.



Note: The User Lookup screen is only available for companies with 50 or more users. If the company has fewer than 50 employees, the user names are displayed in a drop list on the User Profiles screen.

The system displays the User Profiles screen with the selected User's name.

6. Click Change Security to edit the selected User's profile:

The system displays all available privileges and organizations.

7. In the Privileges section, select each privilege that you want to assign to the selected user

8. In the Organizations section, select each organization that you want to grant the selected user access and click Save Changes:

Note: If you know the name of the Customer, Division, or Department that you want to select (but are unsure of its location in the Individual Organizations structure), type its name in the Customer, Division, or Department entry fields and click Search. The Individual Organizations structure automatically opens to display any names matching your search criteria.

The system displays confirmation message across the top of the User Profile screen indicating that your changes have been saved.

Editing Multiple User Profiles

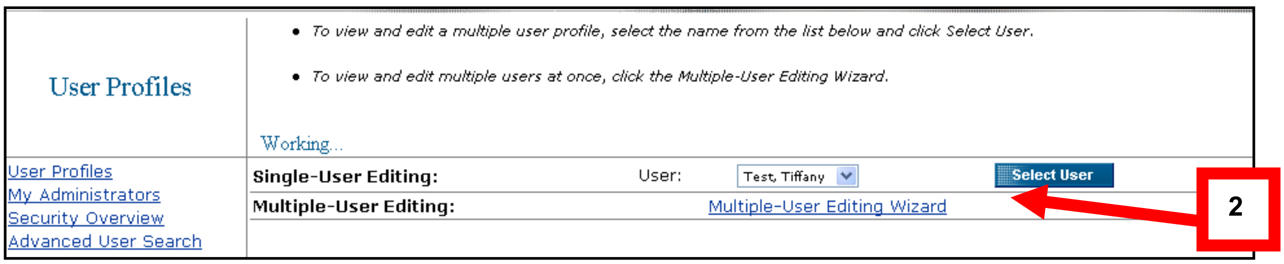
- Enterprise Administrators are authorized to edit User Profiles of Business Groups, Business Group Administrators, other Enterprise Administrators, and all Standard Users.
- Business Group Administrators are authorized to edit User Profiles of Business Group Administrators and Standard Users within their own Business Groups only.

To edit multiple User Profiles, follow these steps:

1. Click Administration and select Security from the Administration menu.

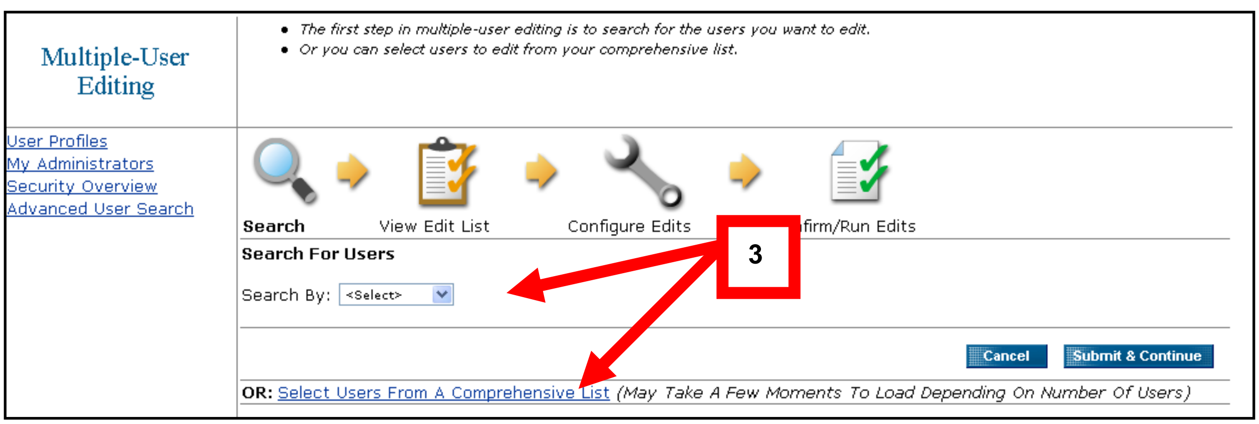
The system displays the User Profiles screen.

2. Click Multiple-User Editing Wizard:



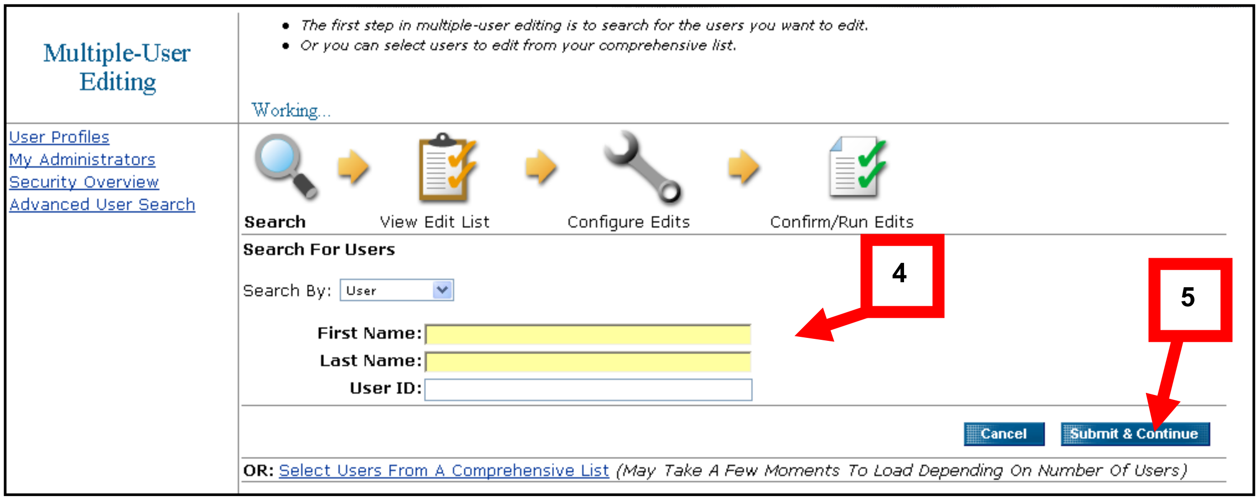
The system displays the Multiple-User Editing screen.

3. You can either click on Search By to set criteria to search for users or click on Select Users From A Comprehensive List link:



4. Select the parameters applicable to the selected search criteria. The options that display depend on the type of search: User, Organization or Privilege.

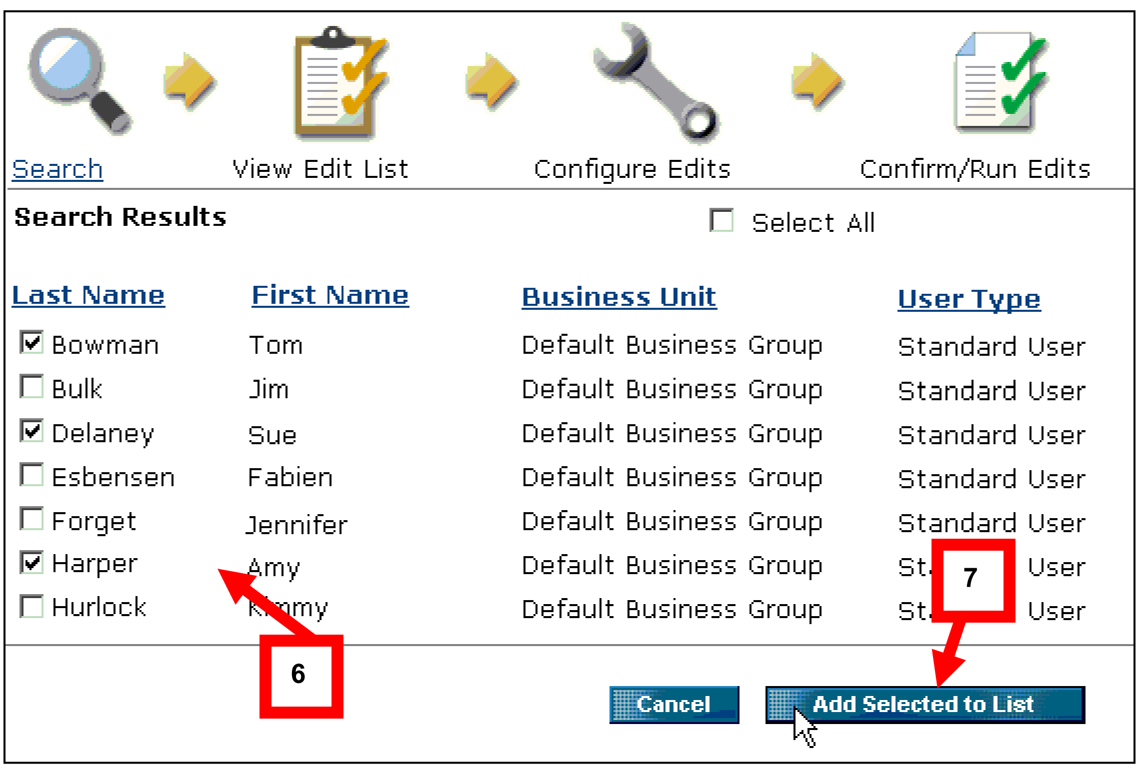
5. Click Submit & Continue.



The system displays the Search Results screen.

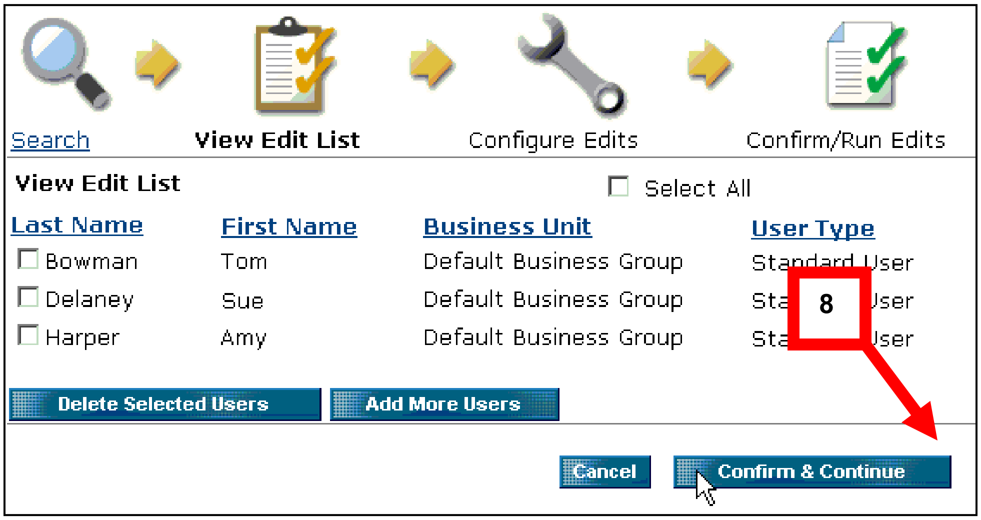
6. Select the users that you want to edit.

7. Click Add Selected to List.



The system displays the View Edit List screen.

8. Add or delete users if needed and click Confirm & Continue:



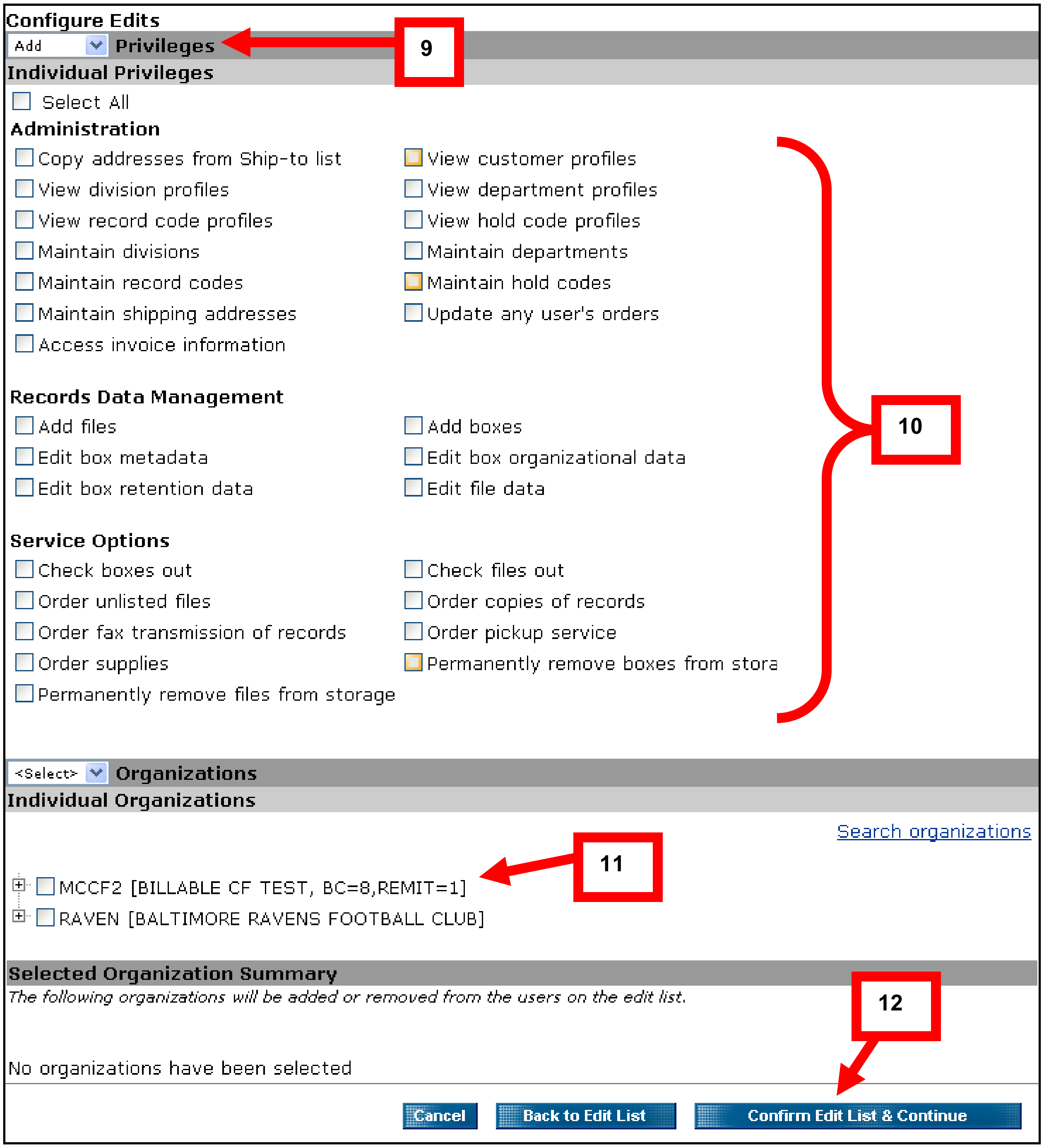
The system displays the Configure Edits screen.

9. Click Privileges and select Add or Remove:

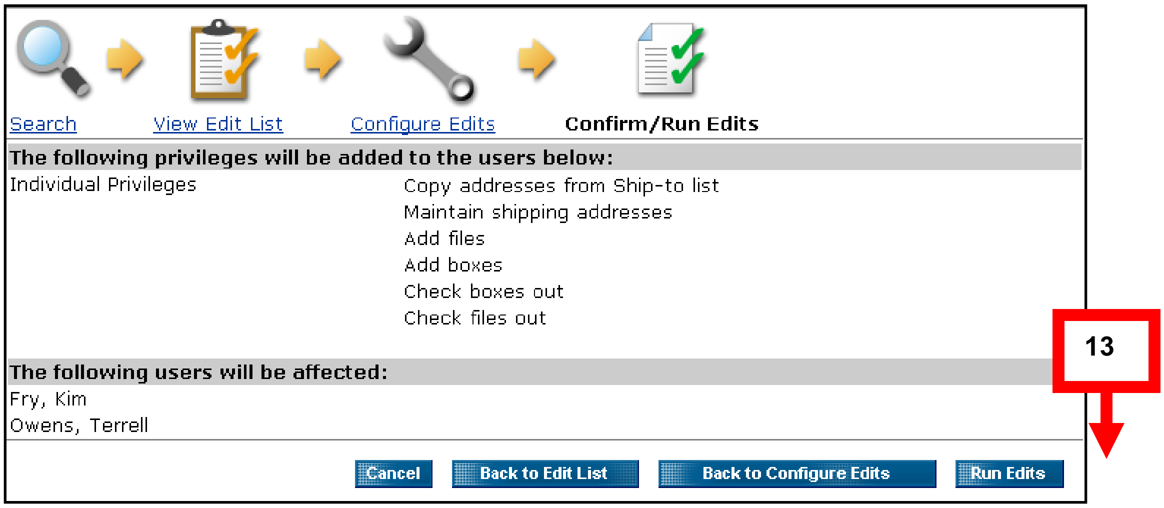
10. In the Privileges section, select each privilege that you want to assign to the selected Business Group

11. In the Organizations section, select each organization that you want to grant the selected Business Group access.

12. Click Confirm Edit List & Continue.



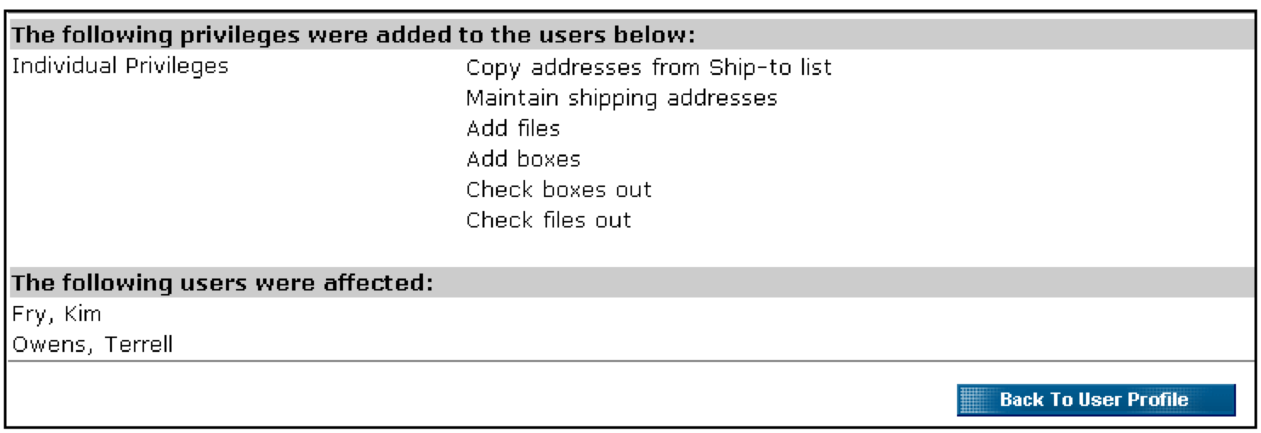
The system displays Confirm/Run Edits screen.



Verify that information displayed is correct.

13. Click Back to Edit List or Back to Configure Edits if you need to make changes. If satisfied with your edits, click Run Edits.

The system displays the Confirmation screen.



Note: For large Multiple User Editing requests, the following message displays across the top of the Confirm/Run Edits screen: “Due to the large nature of your request, we are processing it in the background and will notify you when complete.”

Field Name Customization

Administrators have the ability to customize the field names for the types of data captured about their inventory. The customized field names will be visible in the Search Results, Order screens and reports.

The customization has the benefit of allowing a company to better reflect its operations and terminology within both the Records Center and Report Center.

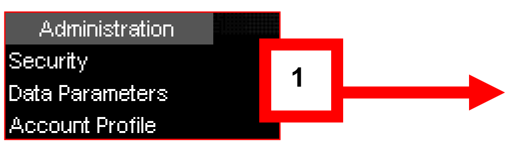
There are two types of customization:

- Drop down lists from which the Administrator can choose the most appropriate description
- Fully customizable field names.

The customization options that are available depend upon the type of file. See the table on page 95 for a full list of options.

Note: System Support must first enable a customer for this service. Once a customer is enabled at the Enterprise level, the Administrator can limit functionality to one account, multiple accounts or all accounts. The Business Group Administrator can also enable or disable the functionality for a specific customer account.

1. Click Administration and select Data Parameters:



2. Make sure Enable Custom Data Parameters has been checked.

3. Select the Data Format from the drop down list.

4. Select a Key Identifier from the drop down list (options depend upon the type of Data Item).

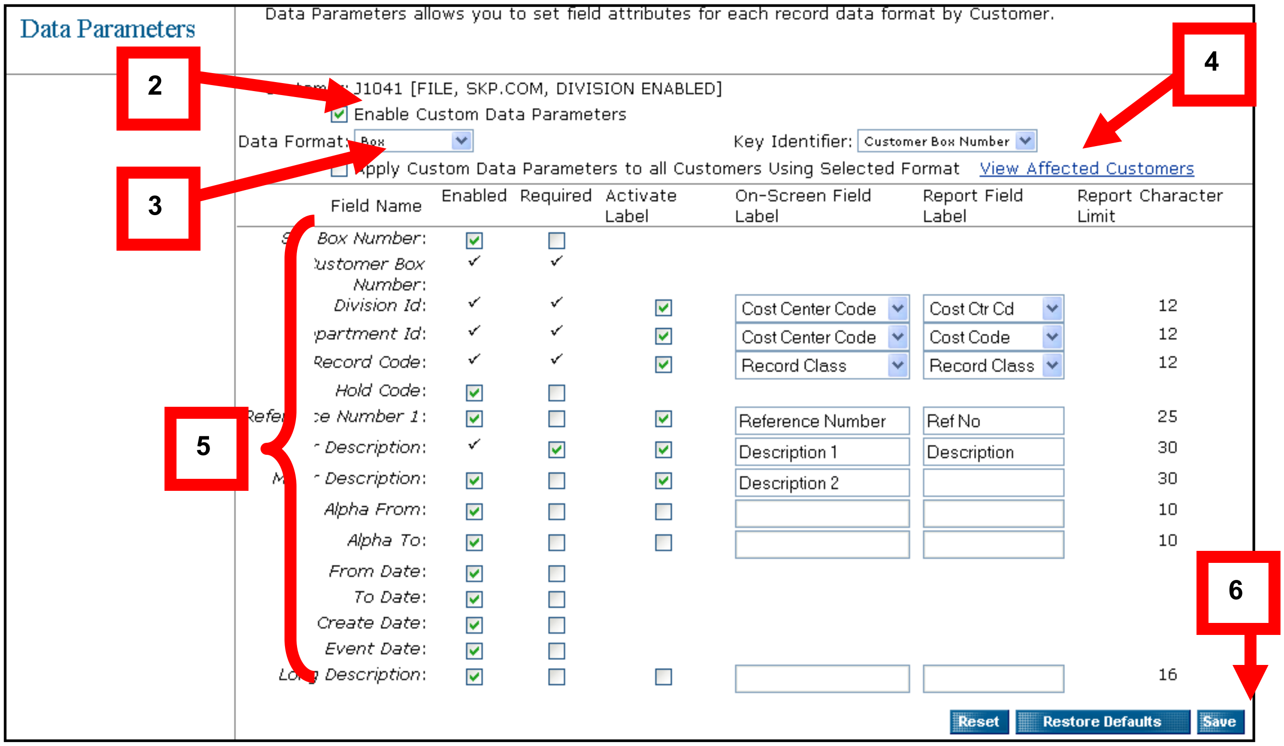
Note: If the account has multiple customers, you can apply the customization to all customer accounts by clicking in the check box.

5. Configure each data field by checking the appropriate boxes:

- Enabled: the field will be available for data entry
- Required: an entry must be made in the field in order to save the information for the specific file
- Activate Label: once checked, either select a label from the drop down list for the on-screen field label and report field label or enter a free-text description for each. Report header character lengths are displayed in the far right column. If left unchecked, the

Field Name description from the left hand column will be displayed on the screen and on reports.

6. Click Save to save your settings.



Note: The Department ID, Division ID and Record Code fields can only be changed to one of the options from the drop down list. Free text entries are not supported for those fields.

Customizable Fields—Drop Down List Options			
Field Name	**Field Label**		
Department Id	Cost Center Code Cost Code Disbursement Code GL Code	Office Number Project ID Site ID Transit	Unit Code Oracle Number Billing Code
Division ID	Cost Center Code Department ID	Geography	Unit Code
Record Code	Box Code Record Class	Record Number Record Series	Retention Period Series ID

Modifiable Fields by Data Type			
Data Type	**Fields**		
Accounting File	Accounting Client Name Client Number From Date	To Date Destruction Date Alpha From	Volume Number Alpha To
Box	Hold Code Reference Number Major Description Minor Description	Alpha From Alpha To From Date To Date	Create Date Event Date Long Description
Standard File	File Description 1 File Description 2 File Description 3 File Description 4	Destruction Date Create Date Birth Date Discharge Date	Social Security Number Alpha From Alpha To Volume Number
Insurance File 1	Claim/Policy Number Office Symbol Claimant Insured Name	Expiration Year Type EIS Destruction Date	Alpha From Alpha To Claim/Policy Indicator Volume Number

Modifiable Fields by Data Type			
Data Type	**Fields**		
Insurance File 2	Insured Name Claimant Name Loss Date	CCL Destruction Date Alpha From	Alpha To Volume Number
Law File	Lawyer 1 Lawyer 2 Client Number Matter Number Letter	Sub Number Matter Description Close Date Number of Files Type	Destruction Date Alpha From Alpha To Volume Number
Loan File	Loan Number Old Loan Number Borrower Name Cost Center	File Type Acquisition Code Destruction Date	Alpha From Alpha To Volume Number
Medical File	Patient Number Birth Date First Name	Last Name Entry Year Destruction Date	Alpha From Alpha To Volume Number

Parameter Histories

The parameter history lists the changes to the data parameters of the selected data format and customer.

Parameter History	Date	Time	Action	Modified By
	08/31/2006	12:34:22 PM (EDT)	Custom Data Parameters Enabled	Saperstein, David
	08/31/2006	11:47:07 AM (EDT)	Custom Data Parameters Deactivated	Garner, Johnathan
	08/07/2006	09:31:55 AM (EDT)	Birth Date enabled removed	Deschane, Dick
	08/07/2006	09:31:55 AM (EDT)	Destruction Date enabled removed	Deschane, Dick
	08/07/2006	09:31:54 AM (EDT)	Patient Number enabled removed	Deschane, Dick

Action	Description
Change in key identifier value	Key identifier of the data format was changed
[field name] enabled	Field selected as enabled for data entry
[field name] required	Field selected as required for data entry
[field name] enabled removed	Field deselected as enabled for data entry
[field name] required removed	Field deselected as required for data entry

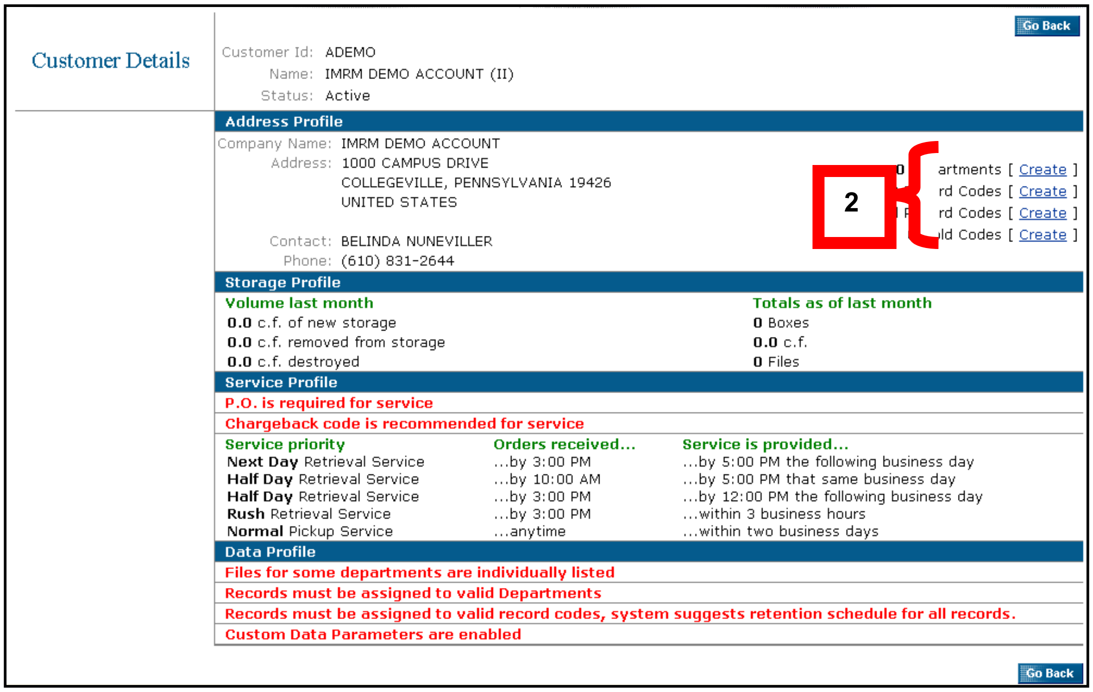
Account Profile

On Customer Details pages, administrators can view address and contact information, monthly storage volume, service priorities, data requirements, and other customer information.

Administrators can also view the divisions, departments, record codes, and hold codes associated with the customer.

1. Click on the Administration menu and select Account Profile

The Account Profile screen will display.



2. On Customer Details pages, you can do the following:

To...	Click...
View divisions	Divisions
View departments	Departments
View or create global record codes	Global Record Codes or Create
View or create hold codes	Hold Codes or Create
Return to the Record Center Customers page	Go Back

Storage Profiles	
Volume last month	Totals as of last month
Cubic feet (c.f.) of new items received for storage during the previous month	Total quantity of boxes in storage on the last day of the previous month
Cubic feet of items permanently withdrawn from storage during the previous month	Total cubic feet of items in storage on the last day of the previous month

Storage Profiles	
Cubic feet of stored items destroyed at the customer's request during the previous month	Total quantity of files in storage on the last day of the previous month. Does not include files that are unlisted, permanently withdrawn, or destroyed.

Service Profile		
Service Priority	**Orders received by...**	**Service provided by...**
Next Day Retrieval Service	3:00 p.m.	5:00 p.m. on the next business day
Half Day Retrieval Service	10:00 a.m.	5:00 p.m. on the same business day
	3:00 p.m.	12:00 p.m. (noon) on the next business day
Rush Retrieval Service	Before 3:00 p.m.	Within three (3) hours on the same business day
	After 3:00 p.m.	11:00 a.m. on the next business day
Normal Pickup Service	Any time	Within two business days

Data Profiles		
Data Issue	**Value**	**Explanation**
Are files individually listed?	Files are individually listed.	All departments of the customer individually list files in the same data format.
	Files are not individually listed.	No departments individually list files.
	Files for some departments are individually listed.	Some, but not all, departments individually list files in the same data format.

Data Profiles		
Data Issue	**Value**	**Explanation**
	Files for departments are listed under various file formats.	All departments individually list files, but in multiple data formats.
Is the box data keyed from the customer or Iron Mountain transmittal forms?	Box data keyed from Iron Mountain transmittals.	Box records are keyed from Iron Mountain transmittal forms.
	Box data keyed from customer transmittals.	Box records are keyed from customer transmittal forms.
Are valid departments required?	Records must be assigned to valid Departments.	Each new record must have a valid Department ID. If new records do not require valid departments, then this line is blank.
Are valid record codes required?	Records must be assigned valid Record Codes.	Each new record must have a valid Department Id. If new records do not require valid record codes, then this line is blank.

Iron Mountain Frequently Asked Questions

Frequently Asked Questions About the Iron Mountain Connect Record Center, powered by the SafeKeeperPLUS® system:

How do I get set up in the IM Connect Record Center?

Please call Systems Support at (800) 888-ASSIST to be guided through the process.

Do I need a separate account for the Record Center, or does my user ID for Iron Mountain Connect work for both?

You only need one login to access all Iron Mountain systems and applications. Contact your Account Manager or Iron Mountain directly to get your new Username and Password.

My login is not working. Who do I call to get activated?

Please call Systems Support at (800) 888-ASSIST for assistance.

How can I get additional help with the Record Center?

Online help is available within the Record Center. Animated tutorials are available on the Help page of IM Connect. For assistance via telephone, please call (800) 888-ASSIST.

How do I order empty cartons?

If the Record Center administrator at your location has granted you access to the order supplies privilege, you can place supply orders online through the Record Center. For assistance via telephone, please call Customer Response at (800) FAST-FILE.

Can I do my own transmittals online?

If the Record Center administrator at your location has granted you access to the Inventory Maintenance capabilities then you can do your own transmittals online.

When I do my transmittals online, how long will it take for the system to reflect the information?

The system will reflect the information when the corresponding cartons are scanned upon arrival at the Iron Mountain records center. This process takes approximately 24 - 48 hours.

I was in the middle of an order and I never checked out. What happens to those cartons?

The order will remain open until you either cancel or complete it.

Where does the information from the Instructions field appear on the Cart?

On the Cart page, the information entered in the Instructions text box will appear on the Outcard and Packing Slip.

How do unlisted files get listed after they are ordered?

When a user Requests an Unlisted File it becomes a temp file until the file is confirmed found. It then is listed in the Record Center (SafeKeeperPLUS) with the new Temp to Perm functionality. Once the temp file becomes a listed file, it can be reordered and will have all the properties of a listed file, including having the Checked out from Iron Mountain status if the file is out.

Is there a transportation option to allow a user to pick up a retrieval order?

The user should enter the information in the Special Instructions section when requesting a retrieval from the Record Center.

How do I edit boxes/files in the Record Center?

If users have the edit box/file privilege, they can search for a given box/file and click the Edit link on the search results page. If the user does not have the privilege the Edit link will not be viewable.

If a Record Code is selected using Lookup on the Add Box/File page, will it populate the destruction date and other fields required for Record Code data?

No. The information is calculated once the box is received. It is not populated on screen.

When will inventory entered via Add Box/File be searchable in the Record Center?

Inventory entered via Add Box/File will be available after Iron Mountain scans the record into the SafeKeeperPLUS system.

User enters data using Add Box/File.

User requests a pickup order.

Iron Mountain scans into the system and matches actual record to paperwork or metadata.

User can then order items via Quick Order entry, but it takes approximately 24 - 48 hours from receipt of the item by Iron Mountain before the records are searchable.

When do I use the Lock/Unlock function available under Add Box/File?

If you are entering multiple records that have identical values in one or more fields, use the Lock command for faster data entry. Once a field is locked, you do not need to re-enter its data in subsequent new records. To remove the lock, click Unlock.

Can the destruction date be edited or added to a box after the box has been inbound?

The destruction date will not be editable if the validate record code flag is set. If the flag is set, the destruction date will be calculated based on the retention information in the Record Center. If this flag is not set, the destruction date will be editable if the data entry parameters are set to allow entry of this field.

Iron Mountain Connect Contact Information

Our proven, structured processes provide security and accuracy in records storage and delivery 24 hours a day, 365 days a year. We're always available to take your call.

Support Contact Information:

Customer Service:

To discuss your unique business needs, call (800) FAST-FILE.

Technical Support:

For technical support needs, call (800) 888-ASSIST.

General Inquiries:

Not sure who to call? All general inquiries can be answered at (800) 899-IRON.

Visit Iron Mountain at: www.ironmountain.com

Glossary

Account Profile	Information about a customer, such as its divisions, departments, record codes, hold codes, and shipping addresses.
Accounting File	Data format for accounting records, with format-specific fields such as Client Name and Client Number.
Address Book	List of the addresses that a user can select for orders.
Administrator	User with access to all Record Center functions and the records for one or more customers, as well as the ability to manage user and account profiles.
Advanced Search	Filtered inquiry function that finds records by customer, record status, and other field criteria. See also: Basic Search.
Attention To Address	Location and contact where and to whom an item that has been retrieved from storage should be forwarded after delivery.
Audit Hold	Halts the destruction of an item pending review by an accounting firm or authorized governmental agency.
Basic Search	Full-text inquiry function that finds records by search words and numbers. See also: Advanced Search.
Bill Code	Classification that specifies how storage, service, supply, and other transactions and their charges are billed on customer invoices.
Billing Address	Location to which Iron Mountain invoices are sent for a particular customer, division, or department.
Box Department	Department associated with a box or the box in which a file or other item is stored.
Box Division	Division associated with a box or the box in which a file or other item is stored.
Box History	Chronological list of the orders and other transactions related to a box record.
Box Record	Set of data fields describing the customer, contents, transactions, and other information pertaining to a box.
Box Record Code	Record code associated with a box or the box in which a file or other item is stored. See also: record code.
Carrier Option	Order option that specifies how items will be transported (for example, by Iron Mountain or by a third-party courier).
Cart	List of records that you are planning to order from storage.
Chargeback Code	Customer-defined classification for tracking and allocating shipping and other charges to customers, contacts, and external projects.
Checkout	Function you use to submit retrieval and permanent withdrawal orders.

Criteria Field	Record field that can be selected in an advanced search.
Customer Box Number	Customer-defined, alphanumeric identifier for a box record. See also: SKP Box Number.
Customer File Number	Customer-defined, alphanumeric identifier for a file record. See also: SKP File Number.
Customer ID	Iron Mountain's unique alphanumeric identifier for a customer.
Customer Number	See: Customer ID.
Data Parameters	Settings that specify the key identifier, enabled fields, and required fields in a data format.
Data Profile	Summary of the data requirements for records assigned to a customer.
Department	An organizational unit of a division to which records of stored items can be assigned.
Destruction Date	Date when a stored item is scheduled to be destroyed, based on its record code or other retention instructions. See also: record code.
Destruction Date Calculation	Method of computing the date on which a stored item is to be destroyed. See also: record code.
Destruction Indicator	Code specifying the reason the destruction of an item has been put on hold (for example, Legal Hold).
Destruction Order	Customer request for a stored item to be destroyed by Iron Mountain. See also: destruction date.
Destruction Type	Code indicating how a stored item is to be destroyed at the expiration of retention.
District	Metropolitan area or region that serves as an Iron Mountain operational unit.
Division	An organizational unit of a customer to which records of stored items are assigned. A division contains one or more departments.
Email Confirmation Address	Address to which an email acknowledgement is sent when an order is received by Iron Mountain.
Event Date	Date of any customer-specified event in a box record (for example, when a file was first stored in the box).
Field Criteria	Record fields and values selected in an advanced search.
File	Document, image, or other item, usually stored in a box, which can have a unique file record.
File Group	A sequence or section of Open Shelf files.
File History	Chronological list of the orders and other transactions related to a file record.

File ID	Unique user-created identifier for an Open Shelf file.
File Record	Set of data describing the customer, contents, transactions, and other information pertaining to a file.
File Sequence Number	Number that specifies the position of a file in a box (for example, “1” for the first file).
Filters	Settings that restrict Advanced Searches to selected customers, departments, record codes, and record types.
Find In Field	Single, user-selected field that is searched by Quick Order Entry.
General Preferences	Settings that specify the default search method and delivery method for your Record Center sessions.
Global Record Code	Record code that applies to the records of all divisions and departments of a customer. See also: record code.
Hold Code	Customer-created code that blocks the destruction of the boxes to which it is assigned.
Image Request	Order to retrieve an image from storage at Iron Mountain and deliver it to a customer.
IMRM Retention	Length of time a record is to be kept in storage at Iron Mountain.
Individual List Codes	Setting specifying how file records are created for the individual files in boxes assigned to a department.
Individually Listed File	File that has its own file record.
Insurance 1 File	Data format for records of insurance claims and policies, with format-specific fields such as Office and Expiration Year.
Insurance 2 File	Data format for insurance claimant records, with format-specific fields such as Claimant Name and Loss Date.
Invoice Inquiry	Search function that finds the totals and component charges of invoices by date, division, and department.
Invoice Number	Alphanumeric identifier assigned by Iron Mountain to a customer invoice.
IOD	Image on Demand. See also: image request.
Key Identifier	Field that records are listed by in search results, your Cart, and other pages.
Law File	Data format for legal records, with format-specific fields such as Client Name and Matter Number.
Legal Hold	Halts the destruction of an item pending the outcome of litigation, government review, or other legal action.

Loan File	Data format for loan records, with format-specific fields such as Loan Number and Borrower Name.
Location	Iron Mountain district (region) where an item is stored.
Lock	Data entry command that saves the value entered in a field for use in subsequent records.
Long Description	Description of up to 2,500 words of the contents of a box.
Master Department	Default department created for every division.
Master Division	Default division created for every customer.
Medical File	Data format for medical records, with format-specific fields such as Patient Number and Entry Year.
Menu Bar	Graphic containing the Record Center main menu command (for example, Search and Orders).
Office Retention	Length of time a record is to be kept by a customer before it is sent to storage at Iron Mountain.
Offsite Shredding	Destruction process in which items are shredded at an Iron Mountain facility.
On Hold	Indicates that the boxes of a customer or department should not be destroyed.
Onsite Shredding	Destruction process in which items are shredded in an Iron Mountain mobile shredding unit at a customer location, so their destruction can be witnessed by the customer.
Open Shelf	System for storing unboxed files at Iron Mountain.
Order History	Chronological list of the transactions related to an order. Appears on the Order Details page.
Order Inquiry	Search function that finds the history, status, and other information about orders.
Order Line	Line on an order specifying the type, quantity, and other instructions related to a box, file, or other item.
Order Number	Number, generated by Iron Mountain, which uniquely identifies each service request pertaining to a record.
Order Status	Current disposition of a customer request.
Order Type	Specifies the kind of service requested from Iron Mountain.
Organization	Hierarchy of divisions and departments of a customer, pertaining to record keeping.
Overage	Charge for transporting items in an order in excess of the amount agreed to in the base charges.

Packing Slip	Form listing the information needed to ship a confirmed order (for example, customer name and address, items shipped, and order type).
Parameter History	Chronological list of the changes made to a data format.
Permanent Withdrawal Order	Request to permanently remove one or more records from storage.
Pickup Address	Location and contact person from which items will be transported to an Iron Mountain storage facility.
Pickup Order	Request for one or more items to be sent to an Iron Mountain storage facility.
Priority	Service level that specifies when an order will be picked up or delivered (for example, Next Day or Rush).
Privilege	User profile setting that grants a user access to a function, such as searching for records.
Qualifiers	Advance Search settings that specify how field criteria are searched (for example, Equal To or Contains). See also: field criteria.
Query	Words, numbers, and other sequences of characters entered in a search field.
Quick Order Entry	Rapid order command that lets you find and add records to your Cart in one step.
Rate Schedule	List of rates charged to customers for various types of transactions (for example, standard and exception rate schedules).
Receipt Date	When an item was originally picked up from a customer by Iron Mountain.
Recently Added Record	Box or file record that documents a box or file not yet processed for storage by Iron Mountain.
Record	Set of data documenting a box, file, image, or other item stored Iron Mountain. On Record Center pages, each record is listed by its key identifier.
Record Code	Customer-created code specifying the length of time that items are to be stored. Formerly known as retention codes.
Record Status	Current disposition of the item documented by a record (for example, At Iron Mountain or Destroyed).
Record Type	General category of records (for example, box records or file records).
Refile	Return a previously retrieved item to storage at Iron Mountain.
Report Center	Section of Iron Mountain Connect that enables you to request and view reports about Record Center activity, retention, and other topics.
Request Date	When an order was originally submitted to Iron Mountain.
Requested By User	Person who requested an order to Iron Mountain.

Requested For User	Person for whom an item was ordered.
Retention	Length of time, defined by a record code, that an item is to be maintained by a customer and by Iron Mountain.
Retention Hold	Assigns one or more hold codes to a box, department, or record code.
Retention Profile	Summary of the settings that determine the destruction date specified by a record code.
Retention Schedule	Classification specifying the type of time period (for example, Monthly, Yearly, and Indefinite) used to calculate the total retention of a record.
Retrieval Order	Request for one or more records to be temporarily removed from storage.
Search Criteria	Data fields that can be selected in an advanced search. Also known as field criteria.
Search Operators	Special words and characters that modify your queries in basic searches and searches within results. For example, a comma between search words operates as an “or.”
Search Preferences	Settings that limit your searches to selected organizations, record types, record statuses, and other criteria.
Search Within Results	Search of the records found by a previous search, used to narrow your results.
Service Priority	Date and time when items are scheduled to be delivered at or picked up from the shipping address on an order.
Service Profile	Summary of the service priorities that can be selected on orders to or from a customer.
Ship-To Code	Classification that specifies where orders are to be shipped for a department.
SKP Box Number	SafeKeeperPLUS Box Number. A bar code number, provided by Iron Mountain, that uniquely identifies a box.
SKP File ID	SafeKeeperPLUS File ID. Unique identifier of a boxed file, consisting of an SKP Box Number plus a File Sequence Number.
SKP File Number	SafeKeeperPLUS File Number. A bar-coded identifier, provided by Iron Mountain, for a file record.
Sort Sequence	Order in which Open Shelf files are stored, based on their File IDs.
Standard File	General data format for file records, including four File Description fields suitable for most types of data.
Standard User	Person with non-administrative access to selected Record Center functions and customer records.

Storage Profile	Summary of storage statistics for a customer, division, or department.
Supply Code	Unique identifier for a type of storage supplies available from Iron Mountain.
Temporary File	See: unlisted file.
Total Retention	Length of time a record is to be kept in storage, both by the customer and at Iron Mountain (office retention plus IMRM retention).
Transmittal Form	Document used for pickup and retrieval orders that contains essential information about a box record such as the Customer ID, SKP Box Number, and Customer Box Number.
Unit Measurement	Incremental number of items associated with a supply code. For example, boxes must be ordered in packs of 25.
Unlisted File	File that is not individually listed in the box in which it is stored because it does not have its own file record. Formerly known as a temporary file.
User History	Chronological list of the changes made to a user profile.
User Profile	Set of functional privileges and organizations assigned to a Record Center user.
Valid Department	Approved, pre-existing department to which a customer's records can be assigned.
Vault	Fire-rated storage facility for magnetic media, with controlled temperature and humidity levels.
Volume Number	Identifier for a quantity of related customer files (for example, various files of a single patient).
Wildcard	Search operator indicated by an asterisk (*) at the end of a word that can stand for any sequence of characters.