



# Creating a New File

IRON MOUNTAIN CONNECT™ RECORDS MANAGEMENT

T2.5.1 11.15

# Creating a New File

Use this guide to learn how to:

- Create a new file that will be picked up and stored inside a box that **ALREADY EXISTS** at an Iron Mountain facility
- Create a new file inside a **NEW** box so that both can be picked up and stored at an Iron Mountain facility
- Use your pickup list to review and update your order. You can edit file details and delete files from the order

# Creating a New File in an EXISTING Box

IRON MOUNTAIN® CONNECT

Welcome rc2jen USA SUPPORT LOG OUT

RECORDS MANAGEMENT

Pickups, Add Records

Quick Pickup Order  
Specify the number of records to be stored at Iron Mountain

> Pickup List (Add Records)  
Add and edit detailed information for records you will be storing at Iron Mountain.

Add Box Add File Go To Quick Pickup Order

Reset View Export

Record Type	SKP Box Number	Customer	Division	Department	Description	Status	Action
All	Type here then click filter	All	Filter				
New Box	435	RC2M1 [RC2M1]	MASTER DIVISION	WASH [HEALTH CLAIM OFFICE]		New Box	Action
	3874	RC2M1 [RC2M1]	MASTER DIVISION	WASH [HEALTH CLAIM OFFICE]		New Box	Action
			R DIVISION	WASH [HEALTH CLAIM OFFICE]		New File	Action
		CF,BC=B,RMT=5]	R DIVISION	MASTER DEPARTMENT		At Iron Mountain	Action
New File	1122334455	JSRC2 [SRVC CF,BC=B,RMT=5]	MASTER DIVISION	MASTER DEPARTMENT	X-rays August 2014	At Iron Mountain	Action

1 Select Pickups, Add Records to create a new file and generate a pickup list.  
Use the left-side navigation bar to move within the different functional areas in Iron Mountain Connect Records Management.

2 Click Pickup List (Add Records).

3 Click Add File.

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# Creating a New File in an EXISTING Box

IRON MOUNTAIN CONNECT

Welcome rc2jen USA SUPPORT LOG OUT

RECORDS MANAGEMENT

Pickups, Add Records

Pickup List (Add Records)

Quick Pickup Order  
Specify the number of records to be stored at Iron Mountain

> Pickup List (Add Records)  
Add and edit detailed information for records you will be storing at Iron Mountain.

Add Box Add File Go To Quick Pickup Order

Reset View Export

Add and edit detailed information for records you will be storing at Iron Mountain.

Record Type	SKP Box Number	Customer	Division	Department	Description	Status	Action
All	Type here then click filter	All	Filter				
New Box	435				H CLAIM	New Box	Action
New Box	3874				H C	New Box	Action
New File	3874				H CL		
Existing Box	12037				INS		
New File	12037				INS	Mountain	Action
Existing Box	112233				RTMENT TARAS BOX FILE TEST	At Iron Mountain	Action
New File	112233				RTMENT X-rays August 2014	At Iron Mountain	Action

Find Existing Box for New File

Choose Customer, enter SKP Box Number and click Continue to find the \*Required field existing box.

\*Customer  
Select

\*SKP Barcode

Continue Cancel

4 Select the Customer and specify the SKP Barcode to pick the box that will contain the file you are creating.

Search, Retrieve

Pickups, Add Records

Order Supplies

Administration

Track Orders

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# Creating a New File in an EXISTING Box

**5** Click Add to Pickup List to include the file on the pickup list; leave it blank to exclude the file from the pickup list.

**6** Enter File Details that will be used for searching on and tracking this file. You must enter data in all required fields (marked with a red asterisk).

**7** Save File & Close to save all of the file details and return to the Pickup List.  
OR  
Save & Add Another File to stay on this screen and continue creating files in the same box.

**i** Click the Customize Layout link to set the required, enabled and disabled fields and to change the layout of the fields on this screen.

Note that your system administrator controls the fields and settings that appear on this screen when you login via a custom file template.

**i** The buttons on the File Details screen are intentionally located at the top of the screen to help differentiate between the Box Details and the File Details screens.

**i** Save data entry time by locking fields that contain data that you will reuse. The data remains in the field until you unlock.

IRON MOUNTAIN CONNECT  
RECORDS MANAGEMENT  
New File  
Save File & Close Save & Add Another File Cancel >Customize Layout  
Add to pickup list  
Enter information about the file.  
Customer JSRC2 [SRVC CF,BC=B,RMT=5]  
SKP Barcode 12021  
Create Date (lock)  
Birth Date (lock)  
Discharge Date (lock)  
From Date (lock) Social Security Number (lock)  
Type (lock)  
\*Description 1 (lock) Description 4 (lock) Description 7 (lock)  
Description 2 (lock) Description 5 (lock) Description 8 (lock)  
Description 3 (lock) Description 9 (lock)  
Destruction Date (lock)  
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# Creating a New File in an EXISTING Box

Pickups, Add Records

**Quick Pickup Order**  
Specify the number of records to be stored at Iron Mountain

**> Pickup List (Add Records)**  
Add and edit detailed information for records you will be storing at Iron Mountain.

Pickup List (Add Records) Help Pickups (0)

[Add Box](#) [Add File](#) [Go To Quick Pickup Order](#) [Reset View](#) [Export](#)

Add and edit detailed information for records you will be storing at Iron Mountain.

**CONFIRMATION**  
File has been added.

**8**  
The file is added to the pickup list and a success message is displayed.

Record Type	SKP Box Number	Customer	Division	Department	Description	Status	Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	All	<a href="#">Filter</a>
New Box	435	RC2M1 [RC2M1]	MASTER DIVISION	WASH [HEALTH CLAIM OFFICE]		New Box	<a href="#">Action</a>
New File	435	RC2M1 [RC2M1]	MASTER DIVISION	WASH [HEALTH CLAIM OFFICE]	X-rays October 2014	New File	<a href="#">Action</a>
New Box	3874	RC2M1 [RC2M1]	MASTER DIVISION	WASH [HEALTH CLAIM OFFICE]		New Box	<a href="#">Action</a>
New File	3874	RC2M1 [RC2M1]	MASTER DIVISION	WASH [HEALTH CLAIM OFFICE]	222222	New File	<a href="#">Action</a>
Existing Box	12037	JSRC2 [SRVC CF,BC=B,RMT=5]	DIVONE [DIVISION ONE]	INS1 [DIV ONE, INS1 FORMAT]		At Iron Mountain	<a href="#">Action</a>
New File	12037	JSRC2 [SRVC CF,BC=B,RMT=5]	DIVONE [DIVISION ONE]	INS1 [DIV ONE, INS1 FORMAT]	X-rays September 2014	At Iron Mountain	<a href="#">Action</a>
Existing Box	1122334455	JSRC2 [SRVC CF,BC=B,RMT=5]	349 [TARA'S QUALITY MASCARAS]	MASTER DEPARTMENT	TARAS BOX FILE TEST	At Iron Mountain	<a href="#">Action</a>
New File	1122334455	JSRC2 [SRVC CF,BC=B,RMT=5]	349 [TARA'S QUALITY MASCARAS]	MASTER DEPARTMENT	X-rays August 2014	At Iron Mountain	<a href="#">Action</a>

Search, Retrieve

**Pickups, Add Records**

Order Supplies

Administration

Track Orders

# Creating a New File in a NEW Box

Pickups, Add Records

Quick Pickup Order  
Specify the number of records to be stored at Iron Mountain

> Pickup List (Add Records)  
Add and edit detailed information for records you will be storing at Iron Mountain.

Pickup List (Add Records) Help Pickups (0)

Add Box Add File Go To Quick Pickup Order Reset View Export

Record Type	SKP Box Number	Customer	Division	Department	Description	Status	Action
All	Type here then click filter	All	Filter				
New Box	435	RC2M1 [RC2M1]	MASTER DIVISION	WASH [HEALTH CLAIM OFFICE]		New Box	Action
New Box	3874	RC2M1 [RC2M1]	MASTER DIVISION	WASH [HEALTH CLAIM OFFICE]		New Box	View
New File			MASTER DIVISION	WASH [HEALTH CLAIM OFFICE]		New File	Edit
			[DIVISION ONE]	INS1 [DIV ONE, INS1 FORMAT]		At Iron Mountain	Add Files
New File	12037	JSRC2 [SRVC CF,BC=B,RMT=5]	DIVONE [DIVISION ONE]	INS1 [DIV ONE, INS1 FORMAT]	X-rays September 2014		Delete
Existing Box	1122334455	JSRC2 [SRVC CF,BC=B,RMT=5]	DIVONE [DIVISION ONE]				Action
New File	1122334455	JSRC2 [SRVC CF,BC=B,RMT=5]	DIVONE [DIVISION ONE]				Action

1 Select Pickups, Add Records to create a new file and generate a pickup list.

2 Click Pickup List (Add Records).

3 Highlight a file and select Add File on the Action dropdown list.

Search, Retrieve  
Pickups, Add Records  
Order Supplies  
Administration

http://sktcd10.kan:8081/RecordCenter/#

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# Creating a New File in a NEW Box

The screenshot shows the 'New File' form in the Iron Mountain Connect system. The form includes fields for Customer, SKP Barcode, Create Date, Birth Date, Discharge Date, From Date, To Date, Type, and nine Description fields. At the top of the form are buttons for 'Save File & Close', 'Save & Add Another File', 'Cancel', and '>Customize Layout'. The form also has a 'Close' button in the top right corner.

**4** Enter File Details that will be used for searching on and tracking this file. You must enter data in all required fields (marked with a red asterisk).

**5** Save File & Close to save all of the file details and return to the Pickup List. OR Save & Add Another File to stay on this screen and continue creating files in the same box.

**i** Click the Customize Layout option to change the fields that display on this screen and their layout. You can also lock fields from this screen. Lock fields after you have populated them with data that you will reuse. This saves data entry time.

**i** The buttons on the File Details screen are intentionally located at the top of the screen to help differentiate between the Box Details and the File Details screens.

# Creating a New File in an NEW Box

**Quick Pickup Order**  
Specify the number of records to be stored at Iron Mountain

Add and edit detailed information for records you will be storing at Iron Mountain.

[Add Box](#) [Add File](#) [Go To Quick Pickup Order](#)

[Reset View](#) [Export](#)

**> Pickup List (Add Records)**  
Add and edit detailed information for records you will be storing at Iron Mountain.



**CONFIRMATION**  
File has been added.

Record Type	SKP Box Number	Customer	Division	Department	Description	Status	Action
<input type="text" value="Type here then click filter"/>	All	<a href="#">Filter</a>					
New Box	435	RC2M1 [RC2M1]	MASTER DIVISION	WASH [HEALTH CLAIM OFFICE]		New Box	<a href="#">Action</a>
New File	435	RC2M1 [RC2M1]	MASTER DIVISION	WASH [HEALTH CLAIM OFFICE]	X-rays October 2014	New File	<a href="#">Action</a>
New Box	3874	RC2M1 [RC2M1]	MASTER DIVISION	WASH [HEALTH CLAIM OFFICE]		New Box	<a href="#">Action</a>
New File	3874	RC2M1 [RC2M1]	MASTER DIVISION	WASH [HEALTH CLAIM OFFICE]	222222	New File	<a href="#">Action</a>
Existing Box	12037	JSRC2 [SRVC CF,BC=B,RMT=5]	DIVONE [DIVISION ONE]	INS1 [DIV ONE, INS1 FORMAT]		At Iron Mountain	<a href="#">Action</a>
New File	12037	JSRC2 [SRVC CF,BC=B,RMT=5]	DIVONE [DIVISION ONE]	INS1 [DIV ONE, INS1 FORMAT]	X-rays September 2014	At Iron Mountain	<a href="#">Action</a>
Existing Box	1122334455	JSRC2 [SRVC CF,BC=B,RMT=5]	349 [TARA'S QUALITY MASCARAS]	MASTER DEPARTMENT	TARAS BOX FILE TEST	At Iron Mountain	<a href="#">Action</a>
New File	1122334455	JSRC2 [SRVC CF,BC=B,RMT=5]	349 [TARA'S QUALITY MASCARAS]	MASTER DEPARTMENT	X-rays August 2014	At Iron Mountain	<a href="#">Action</a>

**6**  
The file is added to the pickup list and a success message is displayed.

- Search, Retrieve
- Pickups, Add Records**
- Order Supplies
- Administration
- Track Orders

# Reviewing Your Order

RECORDS MANAGEMENT

Pickups, Add Records Pickup List (Add Records) Help Pickups (0)

Quick Pickup Order  
Specify the number of records to be stored at Iron Mountain.

Add and edit detailed information for records you will be storing at Iron Mountain.

Files that you created previously are displayed on your pickup list.

Use the pickup list to review your order. View, edit, add, remove and delete files from within the pickup list.

You are able to remove files in existing boxes. This removes the file from the pickup list only.

You are able to delete files in new boxes (with a status of New File); deleting removes the file from the pickup list and from Iron Mountain Connect Records Management.

Example: we selected View to open the File Details screen where you can review and update information for this file.

	Box Number	Description	Status	Action
Existing Box	435			
New File	3874	RC2M1 [RC2M1] MASTER DIVISION WASH [HEALTH CLAIM OFFICE]	New Box	Action
New File	3874	RC2M1 [RC2M1] MASTER DIVISION WASH [HEALTH CLAIM OFFICE]	New File	View Edit Add Files Delete
Existing Box	12037	JSRC2 [SRVC CF,BC=B,RMT=5] DIVONE [DIVISION ONE] INS1 [DIV ONE, INS1 FORMAT]	At Iron Mountain	Action
New File	12037	JSRC2 [SRVC CF,BC=B,RMT=5] DIVONE [DIVISION ONE] INS1 [DIV ONE, INS1 FORMAT] X-rays September 2014	At Iron Mountain	Action
Existing Box	1122334455	JSRC2 [SRVC CF,BC=B,RMT=5] DIVONE [DIVISION ONE] MASTER DEPARTMENT	At Iron Mountain	Action
		JSRC2 [SRVC CF,BC=B,RMT=5] DIVONE [DIVISION ONE] MASTER DEPARTMENT X-rays August 2014	At Iron Mountain	Action

- Search, Retrieve
- Pickups, Add Records
- Order Supplies
- Administration

# Reviewing Your Order

**Click the tabs to view information about the box that contains this file.**

**Example: we selected View to open the File Details screen where you can review and update information for the file.**

**Click Edit to make changes to any of the information for this file.**

File Number: X-rays September 2014		
Status: At Iron Mountain		
FILE DETAILS		
<b>Customer</b> JSRC2 [SD...BC=B,RMT=5]	<b>File Division</b> DIVONE	<b>File Department</b> INS1 [DIV ONE, INS1 FORMAT]
<b>Alpha From</b>		
<b>Alpha To</b>		
<b>Volume Number</b>		
<b>Social Security Number</b>		
<b>Type</b>		
<b>Description 1</b> X-rays September 2014	<b>Description 4</b>	<b>Description 7</b>
<b>Description 2</b>	<b>Description 5</b>	<b>Description 8</b>
<b>Description 3</b>	<b>Description 6</b>	<b>Description 9</b>
<b>Destruction Date</b>	<b>Record Code</b>	

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# Reviewing Your Order

**File Number:** X-rays October 2014      **Status:** New File      Close X

**FILE DETAILS**      **BOX DETAILS**

Edit information about the file. \*Required field

<b>Customer</b> RC2M1 [RC2M1] <b>SKP Barcode</b> 435	<b>File Division</b> Customer not division-enabled	<b>File Department</b> WASH [HEALTH CLAIM OFFICE]
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<b>Create Date</b> <input type="text"/>	<b>Alpha From</b> <input type="text"/>
<b>Birth Date</b> 11/05/1975	<b>Alpha To</b> <input type="text"/>
<b>Discharge Date</b> 10/07/2014	<b>Volume Number</b> <input type="text"/>
<b>From Date</b> <input type="text"/>	<b>Social Security Number</b> <input type="text"/>
<b>To Date</b> <input type="text"/>	<b>Type</b> <input type="text"/>

<b>*Description 1</b> X-rays October 2014	<b>Description 4</b> <input type="text"/>	<b>Description 7</b> <input type="text"/>
<b>Description 2</b> <input type="text"/>	<b>Description 5</b> <input type="text"/>	<b>Description 8</b> <input type="text"/>
<b>Description 3</b> <input type="text"/>	<b>Description 6</b> <input type="text"/>	<b>Description 9</b> <input type="text"/>

<b>Destruction Date</b> <input type="text"/>	<b>Record Code</b> <input type="text"/>
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**Save Changes**      **Cancel**

**Save any changes you made to the information. The system confirms these changes: Changes Saved**

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# Reviewing Your Order

IRON MOUNTAIN® CONNECT

Welcome admin4 USA SUPPORT LOG OUT

RECORDS MANAGEMENT

Pickups, Add Records

Quick Pickup Order  
Specify number of records to be sent to Iron Mountain storage

> Pickup List (Add Records)  
Add/edit detailed information for records you want picked up

2 Click Quick Pickup Order to schedule pickup for the files that you created. Refer to [Placing a Pickup Order](#).

3 Click Export to download a .csv file containing this pickup list for your records.

Record Type	SKP Box Number	Customer	Division	Department	Customer Box Number	Status	Action
BOX	983452	RC258 [RC258]	MASTER DIVISION	DEPT A [ACCOUNTING DEPARTMENT]	999867	New Box	Action
BOX	19385667	RC258 [RC258]	MASTER DIVISION	DEPT A [ACCOUNTING DEPARTMENT]	999867	New Box	Action
BOX	98765473	RC258 [RC258]	MASTER DIVISION	DEPT A [ACCOUNTING DEPARTMENT]	8765463	New Box	Action
BOX	987401234	RC258 [RC258]	MASTER DIVISION	DEPT A [ACCOUNTING DEPARTMENT]	999867	New Box	Action
BOX	11111444559	RC258 [RC258]	MASTER DIVISION	DEPT A [ACCOUNTING DEPARTMENT]	999867	New Box	Action

4 Open your report, save it to your computer or cancel it.

Do you want to open or save admin4\_PickupList.csv from www2.ironmountainconnect.com?

Open Save Cancel

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