



Creating a New Box

IRON MOUNTAIN CONNECT™ RECORDS MANAGEMENT



Creating a New Box

Create new boxes with detailed information that will help if you need to search and retrieve the box in the future.

Use this guide to learn how to:

- Create a new box
- Review and edit box details from within the pickup list

Creating a New Box

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

Add/edit detailed record information

Add Box...

You currently have no records in your list

Reset View Export

1 Select Pickups, Add Records to create a new box.
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 Box.

i Organizations that contract to use Iron Mountain Site Validation to validate pickup and create a traceable chain of custody, will see a variation on this screen.

Search, Retrieve

Pickups, Add Records

Order Supplies

Administration

Track Orders

Creating a New Box

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RECORDS MANAGEMENT

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Check out Pickups (0)

Reset View Export

Choose New Box Type to Add to Pickup List

	Standard Carton 15"L x 12"W x 10" H (1.2 cubic feet)
	Check Carton 24"L x 9"W x 10" H
	Letter Transfer Carton 24"L x 12"W x 10" H (2.4 cubic feet)
	Legal Transfer Carton 24"L x 15"W x 10" H (3.6 cubic feet)
	X-Ray Carton 15"L x 6.25"W x 10" H (1.8 cubic feet)
	Small Planner Carton 4"L x 4"W x 10" H
	Medium Plan Carton 43" L x 6"W x 6" H
	Large Plan Carton 44"L x 9.25" W x 9.25"H

Cancel

4 Select the type of box.

Search, Retrieve

Pickups, Add Records

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Creating a New Box

The screenshot shows the 'New Box' form in the Iron Mountain Connect system. The form is titled 'New Box' and has a 'Close' button in the top right corner. Below the title is a 'BOX DETAILS' tab. The main instruction reads: 'Enter information about the box. "Lock" keeps values when adding another box. *indicates required >Customize Layout'. The 'Customer' field is marked as required and has a dropdown menu open. The dropdown menu lists the following options: 'Select', 'QA28 [QUALITY ASSURANCE TEST CLIENT #28]', 'QA4 [QUALITY ASSURANCE TEST CLIENT #4]', 'RC2S8 [RC2S8]', and 'RC2SP [RC2SP]'. An orange callout box with the number '5' in a blue circle points to the dropdown menu, containing the text 'Select the Customer.'. At the bottom of the form are three buttons: 'Save Box & Close', 'Save & Add Another Box', and 'Cancel'. The background shows the Iron Mountain Connect interface with a navigation menu on the left and a top header with 'Welcome admin4', 'USA', 'SUPPORT', and 'LOG OUT'.

Creating a New Box

The screenshot shows the 'New Box' form in the Iron Mountain Connect system. The form is titled 'New Box' and has a 'Close' button in the top right corner. Below the title is a 'BOX DETAILS' section with a 'Customize Layout' link. The form contains several fields, some of which are marked as required with a red asterisk. The fields are: Customer (RC2S8), Division (Customer not Division enabled), Department (DEPT A [ACCOUNTING DEPART]), SKP Box Number (98765473), Alpha From, Event Date, Customer Box Number (8765463), Alpha To, Long Description, Reference #1, From Date, Major Description (Human Resources), To Date, Minor Description (Payroll), Create Date, Destruction Indicator (Select), and Destruction Date (Select). At the bottom of the form are two buttons: 'Save Box & Close' and 'Save & Add Another Box'.

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

7 Save Box & Close to save all of the box details and return to the Pickup List. OR Save & Add Another Box to stay on this screen and continue creating boxes for the same customer.

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.

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

Reviewing Your Box

IRON MOUNTAIN CONNECT

Welcome admin4 USA SUPPORT LOG OUT

RECORDS MANAGEMENT

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

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

Add/edit detailed record information

Add Box... Go to Quick Pick up Order to specify number of Records

Reset View Export

Record Type	SKP Box Number	Customer	Division	Department	Customer Box Number	Status	Action
BOX	98765473	RC2S8 [RC2S8]	MASTER DIVISION	DEPT A [ACCOUNTING DEPARTMENT]	8765463	New Box	Action

View
Edit
Delete

1 Review your box from within the pickup list.

2 Select View. The Box Details screen opens.

i You are only able to delete boxes with a status of New.

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

Page 1 of 1 Per Page: 25

Displaying 1 - 1 of 1

IRON MOUNTAIN

Reviewing Your Box

IRON MOUNTAIN® CONNECT

Welcome admin4 USA SUPPORT LOG OUT

RECORDS MANAGEMENT

Pickups, Add Records Pickup List (Add)

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

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Add/edit detailed information for records you want picked up

View New Box 8765463

BOX DETAILS

Customer RC258 [RC258]	Division MASTER DIVISION	Department DEPT A [ACCOUNTING DEPARTMENT]
SKP Box Number 98765473	Alpha From	Event Date
Customer Box Number 8765463	Alpha To	Long Description
Reference #1	From Date	
Major Description Human Resources	To Date	
Minor Description Payroll	Create Date	
Destruction Indicator Permanent	Destruction Date	

3 Click Edit to update any of the box information.

Page 1 of 1 Per Page: 25

Displaying 1 - 1 of 1

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Pickup List (Add Records)

Add/edit details

Add Box...

Record Type

BOX

Search, Retrieve

Pickups, Add Records

Order Supplies

Administration

Track Orders

Checkout (0)

Reset View Export

Customer Box Number Status Action

Type here to filter

Filter

8765463 New Box Action

Close X

Edit New Box 8765463

BOX DETAILS

Edit information about the box. *indicates required

*Customer RC2S8 [RC2S8]

Division Customer not Division enabled

*Department DEPT A [ACCOUNTING DEPART]

SKP Box Number 98765473

Alpha From

Event Date

*Customer Box Number 8765463

Alpha To

Long Description

Reference #1

From Date

*Major Description Human Resources

To Date

*Minor Description Payroll

Create Date

Destruction Indicator Permanent

Destruction Date Select

Save Box Changes Cancel

4 Save any of the changes you made to the box information.

Page 1 of 1 Per Page: 25

Displaying 1 - 1 of 1

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

Click Quick Pickup Order to schedule pickup for the boxes that you created. Refer to the Placing a Pickup Order How To training guide.

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

Type here to filter	Type here to filter	Type here to filter	Type here to filter	Type here to filter	Status	Action	
BOX	983452	RC2S8 [RC2S8]	MASTER DIVISION	DEPT A [ACCOUNTING DEPARTMENT]	999867	New Box	Action
BOX	19385667	RC2S8 [RC2S8]	MASTER DIVISION	DEPT A [ACCOUNTING DEPARTMENT]	999867	New Box	Action
BOX	98765473	RC2S8 [RC2S8]	MASTER DIVISION	DEPT A [ACCOUNTING DEPARTMENT]	8765463	New Box	Action
BOX	987401234	RC2S8 [RC2S8]	MASTER DIVISION	DEPT A [ACCOUNTING DEPARTMENT]	999867	New Box	Action
BOX	11111444559	RC2S8 [RC2S8]	MASTER DIVISION	DEPT A [ACCOUNTING DEPARTMENT]	999867	New Box	Action

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

Displaying 1 - 5 of 5