



# Managing Purchase Orders

IRON MOUNTAIN CONNECT™



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# Purchase Orders Overview

Iron Mountain Connect Purchase Order Management enables you to create and manage purchase orders independently. Our wizard walks you through the process, step-by-step, to ensure that you have captured all required information.

Use this guide to learn how to:

- Create new purchase orders
- Replace existing purchase orders
- Search for and view existing purchase orders
- Customize the purchase order results screen

Please note that purchase order functionality is being built incrementally, and that functionality will grow in future releases.

# Creating a Purchase Order

1

Select Purchase Order Management from My Quick Links on the Iron Mountain Connect homepage.

## My Quick Links

- [Purchase Order Management](#)
- [My Profile](#)
- [Resources](#)
- [Pay Bill](#)
- [Retention Schedule](#)

## Training & Resources



### Get Started!

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Messages



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## Thought Leadership



Are you an information professional who wants to enhance, or start-up, a records and information management or information governance program? Take advantage of our proven practices and new thinking to convert knowledge to action

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## System Notifications

**IMPORTANT:** End of Support for Internet Explorer 8 and 10  
Support for Internet Explorer 8 expires June 2016

## What's New

[Check out a demo of Enhanced Search for Records Management](#)

[What's New – IMConnect September 2015 Release](#)



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# Creating a Purchase Order

The screenshot shows the Iron Mountain Connect web application interface. At the top, a blue header bar contains the logo and navigation links: HOME, PO MANAGEMENT, and a search bar. Below the header, the main content area is titled 'My Purchase Orders (1)'. It includes a search bar for PO Number and a 'Create Purchase Order' button. A table lists purchase orders with columns for PO Number, PO Type, PO Status, Effective Date, Expiration Date, Amount, and Remaining Balance. Two callouts are present: an orange one pointing to the 'Create Purchase Order' button and a yellow one pointing to the 'PO Status' column.

IRON MOUNTAIN® CONNECT

Welcome Tyco\_usr1 Tyco\_usr1 PROFILE ENGLISH (US) SUPPORT LOG OUT

HOME PO MANAGEMENT

Purchase Orders

PO Number

My Purchase Orders

Purchase orders you created online in the past year

Company Purchase Orders

Purchase orders created by any Tyco Integrated Security employee during the past year

My Purchase Orders (1)

Search, view and edit purchase orders that you created during the past year. Create new purchase orders that can be utilized company-wide

Create Purchase Order

(Only PO's created during the past 365 days are displayed)

PO Number	PO Type	PO Status	Effective Date	Expiration Date	Amount	Remaining Balance
123	Invoice	Open	01/01/2017	12/31/2017	\$1,000.00	\$1,000.00

2 Click Create Purchase Order.

i You are able to create a purchase order from within My Purchase Orders and from within Company Purchase Orders.

# Creating a Purchase Order: Enter PO Details

The screenshot shows the 'Purchase Order Details' step in the Iron Mountain Connect PO Management system. The interface includes a navigation bar with 'HOME' and 'PO MANAGEMENT' tabs, and a breadcrumb trail: '< Back Create Purchase Order'. The main content area is divided into two sections: 'Purchase Order Details' (active) and 'Assign Organizations'. The 'Purchase Order Details' section contains a form with the following fields:

- PO Type:** Invoice (with an information icon)
- \*Purchase Order Number:** 2017-1
- \*PO Amount:** 10000.00 (with a checkbox for \$0.00)
- \*PO Period:** Annual (dropdown menu)
- \*Year:** 2017 (dropdown menu)
- Effective Date:** 01/01/2017
- Expiration Date:** 12/31/2017
- User ID:** Aon\_usr1
- PO Description:** Office supplies: copier paper, toner, printer cartridges, pens, folders
- \*Requestor Name:** First Name: Benjamin, Last Name: Clark
- \* Notification Contact:** Name: Full name, Email: username@company.com (with an information icon)

Buttons for 'Cancel' and 'Next >' are located at the top left of the form area. A red asterisk indicates required fields.

Welcome Aon\_usr1 Aon\_usr1

PROFILE

ENGLISH (US)

SUPPORT

LOG OUT

3

Enter the purchase order details:

a

Assign a Purchase Order Number that will be used for tracking purposes. Special characters and spaces are not permitted.

b

Enter the total monetary amount allocated to the PO. Click the 0.00 checkbox if the PO is open-ended or if your organization does not use POs to track monetary amounts.

c

Select the time period the PO will be valid. Your selection determines which associated time period fields are required. Set the PO Period to Custom to enter a timeframe not listed on the dropdown. Current POs are candidates for replacement.

d

Describe the purpose of the PO, which can include location, products and services.

e

The Requestor Name and Contact Information defaults from your User Profile. Change this as necessary.


4


Click Next to assign organizations to the purchase order.



The purchase order is not saved until you complete the final step in the wizard.



# Creating a Purchase Order: Assign Organizations



Welcome Aon\_usr1 Aon\_usr1   PROFILE    ENGLISH (US) ▾   SUPPORT ▾   LOG OUT

 HOME   **PO MANAGEMENT** 

< Back   Create Purchase Order

Purchase Order Details

**Assign Organizations**

Select customers to assign to this purchase order

< Purchase Order Details

Cancel

Next >

Customer ▴
<input checked="" type="checkbox"/> CB411 [AON CONSULTING]
<input type="checkbox"/> CD592 [AON CONSULTING]
<input checked="" type="checkbox"/> CD611 [TWG INNOVATIVE SOLUTIONS]
<input type="checkbox"/> CL129 [AON FINANCIAL SERVICES GROUP, 0124]
<input type="checkbox"/> CL157 [AON RISK SERVICES, INC. 0129]
<input type="checkbox"/> CW627 [ROLLINS HUDIG HALL]
<input type="checkbox"/> D3801 [AON RISK SERVICES 3H]
<input type="checkbox"/> D6287 [AON BENFIELD INC.]
<input type="checkbox"/> D6732 [AON RISK SERVICES]
<input type="checkbox"/> D7632 [AON BENFIELD FAC, INC.]
<input type="checkbox"/> D8171 [AON]
<input type="checkbox"/> D931 [AON]
<input type="checkbox"/> D933 [AON]
<input type="checkbox"/> D992 [AON CONSULTING]

5

Assign customer IDs to the PO. Click to select one or more customer IDs that will utilize the PO. All customer IDs that are part of your company display.

Note that you are not able to select customer IDs:




- Associated with the same PO number
- Associated with a PO with any overlap within the same date range
- Inactive status

6

Click Next to select the options that apply to this PO.

The purchase order is not saved until you complete the final step in the wizard.

# Creating a Purchase Order: Assign Organizations

Welcome Jennifer StackhousePROFILE<sup>3</sup>ENGLISH (US) ▾SUPPORT ▾LOG OUT


HOMEPO MANAGEMENT

< BackCreate Purchase Order

Purchase Order DetailsAssign OrganizationsSelect OptionsConfirm

Allocate funds and set purchase order options.

< OrganizationsCancelNext >

**PURCHASE ORDER TO BE REPLACED**

Do Not Replace

The entered purchase order will replace the existing purchase order. Impacted organizations are identified with a ✓.

	PO Number	PO Type	Original Amount	Effective Date	Expiration Date
EXISTING:	3021.71.1900000	Invoice	0.00	01/01/2016	12/31/2035
EXISTING:	4321.71.5050000	Invoice	0.00	01/01/2016	12/31/2035
NEW:	NW2018-2927	Invoice	495.76	01/01/2018	12/31/2018

CustomerSplit Evenly Allocated Amount: \$495.76 (USD)

✓ Impacted Orgs

✓ V8821 [FRASER HEALTH AUTHORITY]495.76 ×

✓ V8797 [FRASER HEALTH AUTHORITY ST MARYS H]0

Total:\$495.76

**7**

**OPTIONAL STEP:** If you selected a **CURRENT** date range, you are prompted with the option to use this PO to replace an existing PO. Allocate the funds to the selected organizations, then click Next.

**OR**

If this is **NOT** a replacement, click **Do Not Replace** to return to the Purchase Order Details step in the wizard.



# Creating a Purchase Order: Set Options

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Welcome Aon\_usr1 Aon... PROFILE ENGLISH (US) ▾ SUPPORT ▾ LOG OUT

HOME PO MANAGEMENT

< Back Create Purchase Order

Purchase Order Details Assign Organizations Select Options

Allocate funds and set purchase order options.

< Organizations Cancel Next >

Customer	<a href="#">Split Evenly</a>	Allocated Amount: \$10,000.00 (USD)
5107S [AON CONSULTING, INC.]	<input type="text"/>	2000
CB411 [AON CONSULTING]	<input type="text"/>	1575
CD611 [TWG INNOVATIVE SOLUTIONS]	<input type="text"/>	6425
Total:		\$10,000.00

8

Set the PO allocation amounts:

- If this PO is for a single customer, the Allocated Amount defaults from the Amount in the PO Details step. To update it, use the back buttons to return to the PO Details screen.
- If this PO applies to more than one customer:
  - Enter an amount for each customer. The total amount must equal the Allocated Amount.
  - Click Split Evenly to evenly distribute the money allocated to the PO between the customers.

9

Click Next to confirm the information and options on the PO.

The purchase order is not saved until you complete the final step in the wizard.

# Creating a Purchase Order: Confirm & Finish

IRON MOUNTAIN® CONNECT

Welcome Tyco\_usr1 Tyco\_usr1 PROFILE ENGLISH (US) SUPPORT LOG OUT

HOME PO MANAGEMENT

< Back Create Purchase Order

**10**

**Purchase Order Details** Assign Organizations

Review the purchase order summary, then click Finish to create the purchase order.

**Are you sure you want to create purchase order 2017-1?**  
Click Finish to acknowledge and agree to the purchase order allocations and options shown below and to create the purchase order.  
Click Cancel to discard the purchase order or click Purchase Order Details to return to and modify the purchase order.

< PO Details Cancel **Finish**

**PO DETAILS**

<b>PO Type</b> Invoice	<b>User ID</b> Aon_usr1
<b>PO Number</b> 2017-1	<b>PO Description</b> Office supplies: copier paper, toner, printer cartridges, pens, folders
<b>PO Amount</b> \$10,000.00 (USD)	<b>Requestor Name</b> Benjamin Clark
<b>PO Period</b> Annual	
<b>Effective Date</b> 01/01/2017	
<b>Expiration Date</b> 12/31/2017	

Customer	Allocated Amount (USD)
[5107S] AON CONSULTING, INC.	\$2,000.00
[CB411] AON CONSULTING	\$1,575.00
[CD611] TWG INNOVATIVE SOLUTIONS	\$6,425.00
<b>Total:</b>	<b>\$10,000.00</b>

Review and confirm that the information entered on the PO is correct, then click Finish. Once the PO is created, you are able to search and view it from the Search Results screen.

**i** If you need to correct information on the PO, click the <PO Details back button to return to the previous step in the wizard.

Continue to click back buttons to navigate to the appropriate wizard step and make the correction.

# Viewing & Editing an Existing Purchase Order

IRON MOUNTAIN® CONNECT

Welcome Aon\_usr1 Aon\_usr1 PROFILE ENGLISH (US) SUPPORT LOG OUT

HOME PO MANAGEMENT

Purchase Orders Company Purchase Orders (11)

Search and view purchase orders that you created during the past year. Create new purchase orders that can be utilized company-wide

Create Purchase Order

(Only PO's created during the past 365 days are accessible.)

PO Number	PO Type	PO Status	Effective Date	Expiration Date	Amount	Remaining Balance
<a href="#">M00041000024051</a>	Invoice	Open	12/13/2016		\$0.00	\$0.00
<a href="#">K002910000012017</a>	Invoice	Open	12/01/2016	12/31/2017	\$0.00	\$0.00
<a href="#">K04011000019781</a>	Invoice	Open	10/01/2016	12/31/2017	\$10,598.91	\$10,598.91
<a href="#">M00041000016578</a>	Invoice	Open	09/16/2016		\$422.10	\$176.66
<a href="#">M00181000016498</a>	Invoice	Open	08/01/2016	12/31/2017	\$10,000.00	\$9,736.40
<a href="#">K00871000017080</a>	Invoice	Open	08/31/2016	08/31/2017	\$2,400.00	\$1,718.55
<a href="#">M00101000013966</a>	Invoice	Open	08/01/2016	08/31/2017	\$18,000.00	\$11,983.94

1

Search for an existing PO:

- To search for a specific PO, type the full PO Number into the PO Number search field.
- To search for a PO that you created, click My Purchase Orders.
- To search for a company PO, click Company Purchase Orders. Company POs include POs that you created.

2

Click the PO Number link to open an existing PO.

# Viewing & Editing an Existing Purchase Order

**IRON MOUNTAIN® CONNECT**

Welcome Aon\_usr1 Aon\_usr1 PROFILE ENGLISH (US) ▾ SUPPORT ▾ LOG OUT

HOME PO MANAGEMENT

Purchase Orders

PO Number

My Purchase Orders

Purchase orders you created online in the past year

Company Purchase Orders

Purchase orders created by any Aon Enterprise Program - US employee during the past year.

My Purchase Orders (8)

Search, view

Create PO

(Only PO's created by you)

PO Number

1111

Paultest\_1

Paultest\_4

Paultest\_3

POTest123

Paultest-56

Paultest-88

2017-1

**Purchase Order: 2017-1**

PO DETAILS OPTIONS UTILIZATION

Detailed information about this purchase order.

\* Required field

PO Type: Invoice

User ID: Aon\_usr1

PO Status: Open

PO Number: 2017-1

PO Description: Office supplies: copier paper, toner, printer cartridges, pens

\*Requestor Name

First Name: Benjamin

Last Name: Clark

\*Notification Contact

Email: GSussman@worldco.com

PO Amount: \$10,000.00 (USD)

Remaining PO Balance: \$10,000.00 (USD)

Increase PO By: 2000

Effective Date: 01/01/2017

Expiration Date: 12/31/2017

Next Cancel

3 The PO opens to the PO Details tab screen. Update information as necessary.

3 To add funds to the PO, enter an amount in the Increase PO By field.

4 Click Next to open the Options tab screen.

# Viewing & Editing an Existing Purchase Order

**IRON MOUNTAIN® CONNECT**

Welcome Aon\_usr1 Aon\_usr1 PROFILE ENGLISH (US) ▾ SUPPORT ▾ LOG OUT

HOME PO MANAGEMENT

Purchase Orders

PO Number

My Purchase Orders

Purchase orders you created online in the past year

Company Purchase Orders

Purchase orders created by any Aon Enterprise Program - US employee during the past year.

My Purchase Orders (8)

Search, view

Create

(Only PO's)

PO Number

1111

Paultest\_1

Paultest\_4

Paultest\_3

POTest123

Paultest-56

Paultest-83

2017-1

**Purchase Order: 2017-1**

PO DETAILS OPTIONS UTILIZATION

Allocate funds and set purchase order options.

**REVIEW ALLOCATIONS**

Updating the purchase order amount requires you to review and adjust the allocations as necessary.

Customer	Remaining Balance (USD)	Allocated Amount: \$2,000.00
[51075] AON CONSULTING, INC.	\$2,000.00	500.00
[CB411] AON CONSULTING	\$1,575.00	1250.00 x
[CD611] TWG INNOVATIVE SOLUTIONS	\$6,425.00	250.00

Total: \$1

Save Cancel

5 Use the Options tab to review PO allocations. If you increased the PO allocation in step 3, enter the amount that applies to each customer.

6 Click Save.

# Viewing & Editing an Existing Purchase Order

The screenshot displays the Iron Mountain Connect web application interface. The top navigation bar includes the logo, user information (Welcome Aon\_usr1 Aon\_usr1), and links for PROFILE, ENGLISH (US), SUPPORT, and LOG OUT. The left sidebar shows navigation options like HOME and PO MANAGEMENT. The main content area displays the 'Purchase Order: 2017-1' details, with the 'UTILIZATION' tab selected. This tab shows a table of allocations with columns for Customer, Allocated Amount, and Remaining Allocated Bal. An orange callout box with a blue circle containing the number 7 points to the 'UTILIZATION' tab, stating: 'Click the Utilization tab to review invoices applied to the PO, sorted by customer.' Another orange callout box with a blue circle containing the number 8 points to the 'Save' button at the bottom of the PO details, stating: 'If you have made changes on the PO Details or Options tab that you have not yet saved, click Save.'

**Purchase Order: 2017-1**

PO DETAILS OPTIONS **UTILIZATION**

Review the invoices applied to this purchase order.

PO Number	PO Type	PO Amount
2017-1	Invoice	\$10,000.00

PO Status	Effective Date	Expiration Date
Open	01/01/2017	12/31/2017

PO Description: Office supplies: copier paper, toner, printer cartridges, pens, folders

**ALLOCATIONS**

Note: Remaining PO Balance and Remaining Allocated Balance may differ; Remaining PO Balance includes charges pending invoice, whereas Remaining Allocated Balance includes invoiced charges only.

Customer	Allocated Amount	Remaining Allocated Bal.
▶ Customer 5107S [AON CONSULTING, INC.]	\$2,500.00	\$2,000.00
▶ Customer CB411 [AON CONSULTING]	\$2,825.00	\$1,575.00
▶ Customer CD611 [TWG INNOVATIVE SOLUTIONS]	\$6,675.00	\$6,425.00

Amount Remaining Balance

\$10,000.00	\$10,000.00
\$1,000.00	\$1,000.00
\$2,000.00	\$2,000.00
\$3,000.00	\$3,000.00
\$10,000.00	\$10,000.00
\$15,000.00	\$15,000.00
\$15,000.00	\$15,000.00
\$10,000.00	\$10,000.00

Save Cancel

# Customizing the Purchase Order Grid Screen

The screenshot shows the Iron Mountain Purchase Order Grid Screen. The interface includes a top navigation bar with 'HOME' and 'PO MANAGEMENT' tabs. A search bar is located on the left side of the grid. The grid itself displays a list of purchase orders with columns for PO Number, PO Type, PO Status, Effective Date, Expiration Date, Amount, and Remaining Balance. Three callout boxes provide instructions on how to customize the screen:

- ENLARGE THE SCREEN**  
Click to hide the Search bar and display more results. Click a second time to reset the display.
- CHANGE COLUMN SIZE**  
Position your cursor over the edge of the column, then click and drag the column to the appropriate width.
- RE-ORDER COLUMNS**  
Left click on a column header to select, then drag and drop the column in a different position on the grid.

PO Number	PO Type	PO Status	Effective Date	Expiration Date	Amount	Remaining Balance
<a href="#">POTest123</a>	Invoice	Open	05/01/2017	05/31/2017	\$10,000.00	\$10,000.00
<a href="#">Paultest-5678</a>	Invoice	Open	04/01/2017	06/30/2017	\$15,000.00	\$15,000.00
<a href="#">Paultest-88888</a>	Invoice	Open	04/01/2017	06/30/2017	\$15,000.00	\$15,000.00
<a href="#">2017-1</a>	Invoice	Open	01/01/2017	12/31/2017	\$10,000.00	\$10,000.00



# Customizing the Purchase Order Grid Screen

IRON MOUNTAIN® CONNECT

Welcome Aon\_usr1 Aon\_usr1 PROFILE ENGLISH (US) SUPPORT LOG OUT

HOME PO MANAGEMENT

Purchase Orders Company Purchase Orders (12)

PO Number  
2017-1

My Purchase Orders  
Purchase orders you created online in the past year

Company Purchase Orders  
Purchase orders created by any Aon Enterprise Program - US employee during the past year.

Create Purchase Order

(Only PO's created during the past 365 days are accessible.)

PO Number	PO Type	PO Status	Effective Date	Expiration Date	Amount	Remaining Balance
<a href="#">POTest123</a>	Invoice	Sort Ascending	05/01/2017	05/31/2017	\$10,000.00	\$10,000.00
<a href="#">PaulTest-5678</a>	Invoice	Sort Descending	04/01/2017	06/30/2017	\$15,000.00	\$15,000.00
<a href="#">PaulTest-8888</a>		Columns		06/30/2017	\$15,000.00	\$15,000.00
		Open		12/31/2017	\$10,000.00	\$10,000.00
		Open		12/31/2017	\$12,151.76	\$12,151.76
		Open			\$0.00	\$0.00
		Open		12/31/2017	\$0.00	\$0.00
		Open		12/31/2017	\$10,598.91	\$10,598.91
		Open			\$422.10	\$176.66
		Open		12/31/2017	\$10,000.00	\$9,736.40
		Open	08/31/2016	08/31/2017	\$2,400.00	\$1,718.55
		Open	08/01/2016	08/31/2017	\$18,000.00	\$11,983.94

**PO Number**  
PO Type  
PO Status  
Effective Date  
Expiration Date  
Amount  
Remaining Balance  
Print On Invoice

## SORT RESULTS

Hover over the right edge of the column you wish to sort, then select Sort Ascending or Sort Descending.

## CHANGE WHICH COLUMNS DISPLAY

Hover over the right edge of any column, then move your cursor over Columns on the dropdown.

Click the checkbox to the left of columns you want to display. Click a second time to remove the column from the display.