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# Retrieving Records

**IRON MOUNTAIN CONNECT™ RECORDS MANAGEMENT**



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# Overview: Retrieving Records Stored at Iron Mountain

After you have searched for and located records that are stored at Iron Mountain, you will create a retrieval order for one or more records to be delivered to you from storage.

The retrieval order wizard will step you through the process of requesting items, entering delivery information and finalizing the order.

Use this guide to learn how to:

- Enter a retrieval order
- Retrieve unlisted files
- Retrieve unlisted open shelf files
- Add large quantities of records to the cart and remove large quantities of records from the cart

# Retrieving Stored Records

The screenshot shows the Iron Mountain Connect interface. At the top, the logo and navigation links are visible. The main content area is titled 'RECORDS MANAGEMENT'. On the left, there is a search sidebar with various filters and a search button. The search bar contains the text 'DIST CTR'. Below the search bar, there are radio buttons for 'Record Type' (All, Boxes, Files), a dropdown for 'Customer' (RC2M2 [RC2M2]), a dropdown for 'Department' (All), a dropdown for 'Status' (All), and a dropdown for 'File Group' (Select). A 'Search' button is located at the bottom of the sidebar. On the right, there is a search results area with a 'Search R' label and a 'Help' icon. A 'Retrievals (8)' button is also visible. Two callout boxes provide instructions: Callout 1 points to the left sidebar, and Callout 2 points to the search bar.

Welcome rc2jen USA SUPPORT LOG OUT

RECORDS MANAGEMENT

Search Search Tools Search R

DIST CTR

Record Type  
 All  Boxes  Files

Customer  
RC2M2 [RC2M2]

Department  
All

Status  
All

File Group  
Select

Search

Help Retrievals (8) Reset View Export

records.

2 Enter a Keyword and set additional filters as necessary. Refer to the [Searching](#) training guide for more detailed information on using Search functionality.

1 Select Search, Retrieve.  
Use the left-side navigation bar to move within the different functional areas in Iron Mountain Connect Records Management.

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

# Retrieving Stored Records

IRON MOUNTAIN CONNECT

RECORDS MANAGEMENT

Welcome rc2jen USA SUPPORT LOG OUT

Search Search Tools 306 Search Results

DIST CTR

Record Type  
 All  Boxes  Files

Customer  
 RC2M2 [RC2M2]

Department  
 All

Status  
 All

File Group  
 Select

Search

Request Unlisted Open Shelf File

4 Click the Retrievals button to open the retrieval order wizard, which steps you through the order process.

3 Select an item, then click Add to Cart. The number of items in your cart is incremented.

Item Type	Customer	Division	Department	SKP Barcode	Alpha From	Customer Box Num...	Status	Action
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647104		108647104	At Iron Mountain	Filter Add to Cart Action
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647109		108647109	At Iron Mountain	Filter Add to Cart Action
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647112		108647112	At Iron Mountain	Filter Add to Cart Action
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647113		108647113	At Iron Mountain	Filter Add to Cart Action
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647120		108647120	At Iron Mountain	Filter Add to Cart Action
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647124		108647124	At Iron Mountain	Filter Add to Cart Action
BOX	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647125		108647125	At Iron Mountain	Filter Add to Cart Action

Retrievals (8)

Reset View Export

Search, Retrieve

Pickups, Add Records

Bulk Upload

Order Supplies

Administration

Track Orders

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IRON MOUNTAIN

# Retrieving Stored Records

IRON MOUNTAIN CONNECT

RECORDS MANAGEMENT

Welcome rc2jen USA SUPPORT LOG OUT

Search Search Tools 306 Search Results Help Retrievals (10)

DIST CTR

Record Type: All Boxes Files

Customer: RC2M2 [RC2M2]

Department: All

Status: All

File Group: Select

Search

Action Request Unlisted Open Shelf File

Item Type	Customer	Division	Department	SKP Barcode	Alpha From	Customer Box Num...	Status	Action
<a href="#">All</a>	Type here then	Type here then	Type here then	Type here then click	Type here then click fil	Type here then click fil	All	Filter
<a href="#">BOX</a>	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647102		108647102	At Iron Mountain	Add to Cart
<a href="#">BOX</a>	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647103		108647103	At Iron Mountain	Add to Cart
<a href="#">BOX</a>	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647104		108647104	At Iron Mountain	Add to Cart
<a href="#">BOX</a>	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647112		108647112	At Iron Mountain	Remove
<a href="#">BOX</a>	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647124		108647124	At Iron Mountain	Add to Cart
<a href="#">BOX</a>	RC2M2 [RC2M2]	Customer Not Division-Enabled	75 [HICKORY RIDGE DIST CTR-MD]	108647125		108647125	At Iron Mountain	Add to Cart

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IRON MOUNTAIN

**Entries displayed in blue are clickable links. Click on the link to view the details.**

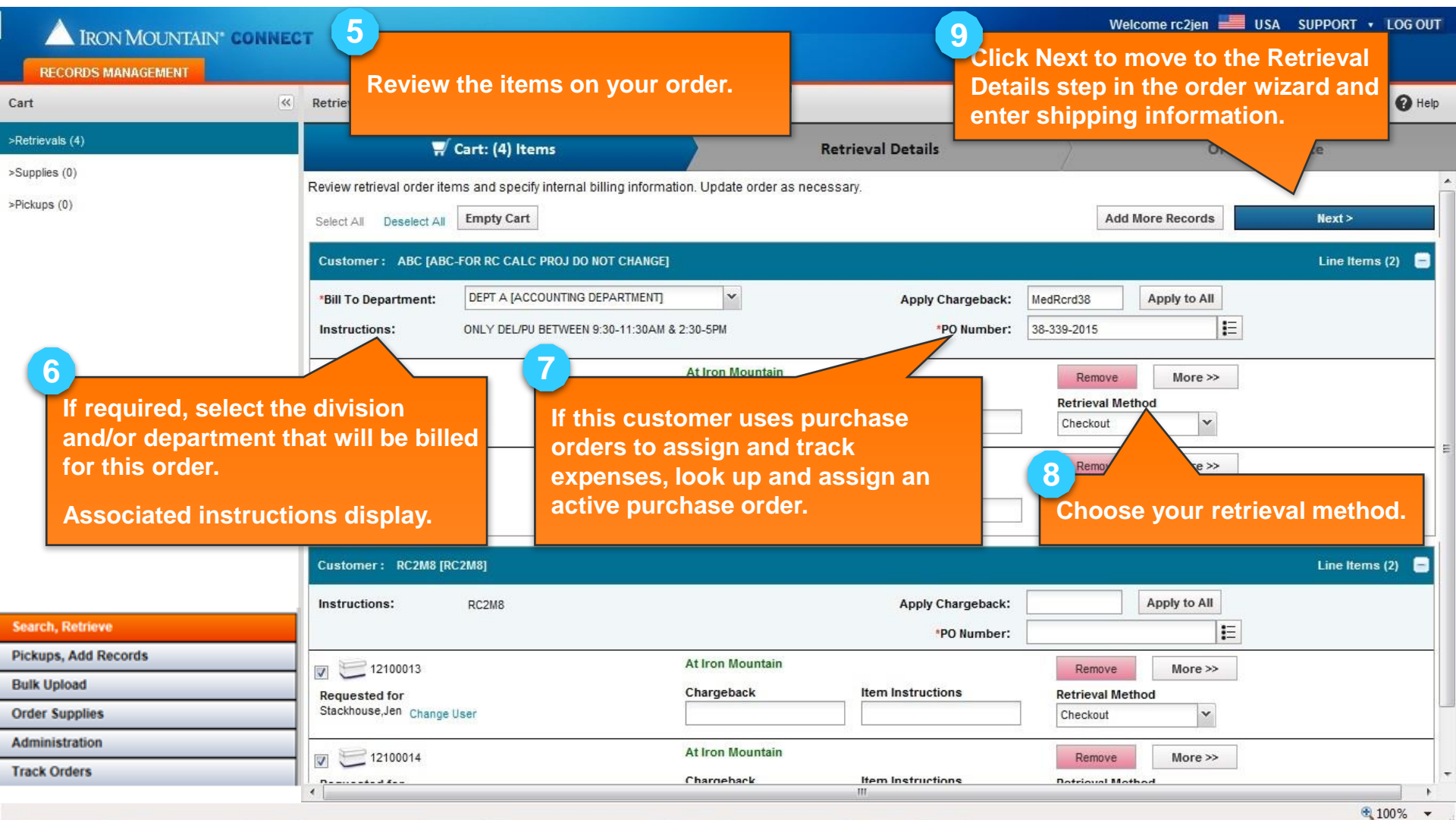
**Remove records from your cart easily.**

**Page through your search results.**

**Change the number of records displayed on the screen.**



# Retrieving Stored Records



**5** Review the items on your order.

**9** Click Next to move to the Retrieval Details step in the order wizard and enter shipping information.

**6** If required, select the division and/or department that will be billed for this order. Associated instructions display.

**7** If this customer uses purchase orders to assign and track expenses, look up and assign an active purchase order.

**8** Choose your retrieval method.

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

# Retrieving Stored Records

The screenshot displays the IRON MOUNTAIN CONNECT interface. At the top, the navigation bar includes the logo, 'Welcome rc2jen USA', and links for 'SUPPORT' and 'LOG OUT'. The main content area is titled 'RECORDS MANAGEMENT' and features a sidebar on the left with options like 'Cart', '>Retrievals (4)', '>Supplies (0)', and '>Pickups (0)'. The main panel shows a 'Retrieval Details' section with a header 'Review retrieval order items. Specify internal billing information. Update order as necessary.' Below this are buttons for 'Select All', 'Deselect All', and 'Empty Cart', along with 'Add More Records' and 'Next >' buttons. The order details are organized into sections for different customers: 'Customer: ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]', 'Customer: RC2M8 [RC2M8]', and 'Customer: RC2M8 [RC2M8]'. Each section includes fields for 'Bill To Department', 'Apply Chargeback', 'Instructions', and '\*PO Number'. Below these are lists of items with checkboxes, 'Requested for' information, 'Chargeback' fields, 'Item Instructions' fields, and 'Retrieval Method' dropdowns. A sidebar on the left contains navigation links: 'Search, Retrieve', 'Pickups, Add Records', 'Bulk Upload', 'Order Supplies', 'Administration', and 'Track Orders'. The bottom right corner shows a search icon and '100%' zoom level.

**i** Empty the cart and restart the retrieval process.

**i** Return to the Search Results screen and add additional boxes/files to your order.

**i** Enter any instructions that are specific to this order item.



# Retrieving Stored Records

10

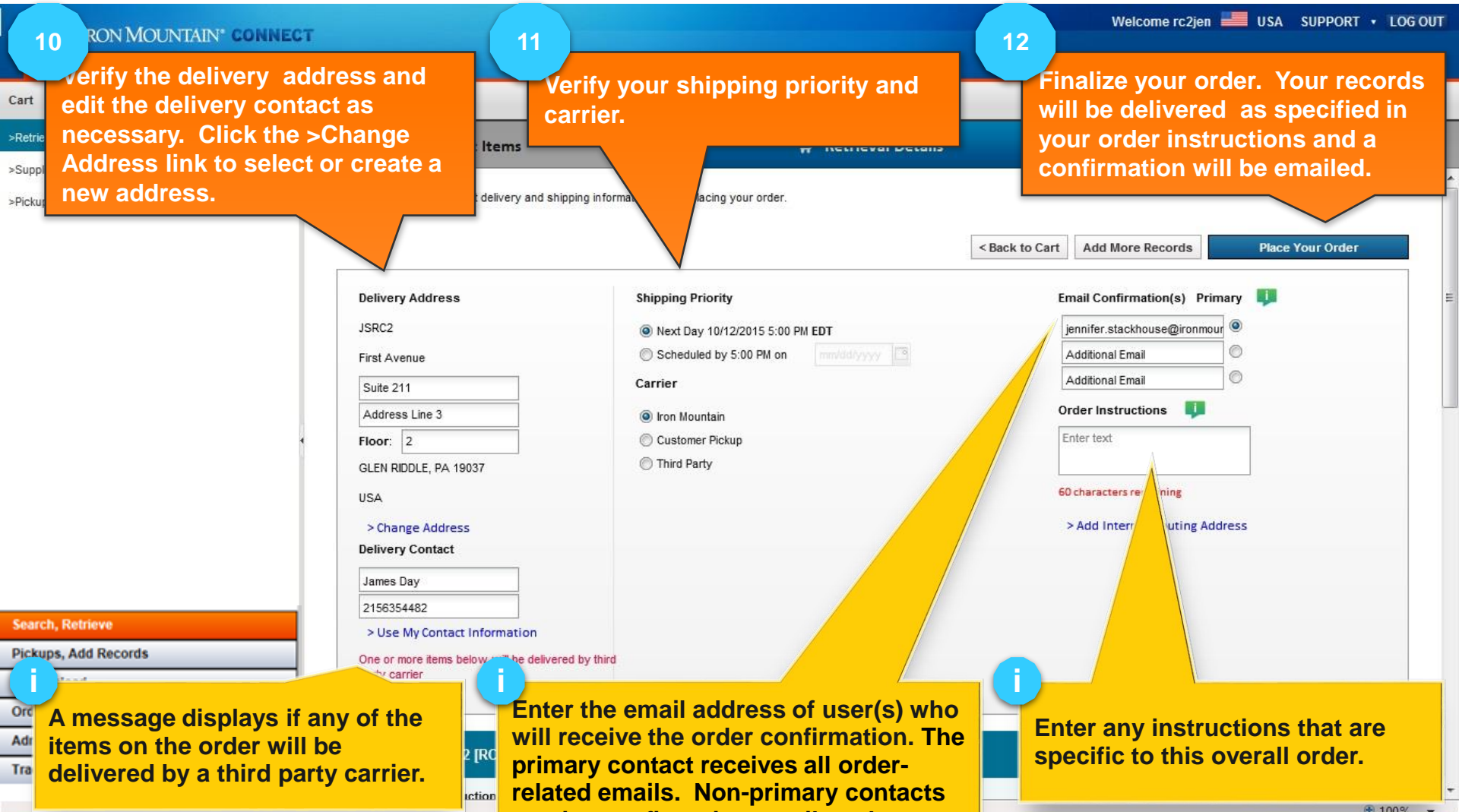
Verify the delivery address and edit the delivery contact as necessary. Click the >Change Address link to select or create a new address.

11

Verify your shipping priority and carrier.

12

Finalize your order. Your records will be delivered as specified in your order instructions and a confirmation will be emailed.



i

A message displays if any of the items on the order will be delivered by a third party carrier.

i

Enter the email address of user(s) who will receive the order confirmation. The primary contact receives all order-related emails. Non-primary contacts receive confirmation emails only.

i

Enter any instructions that are specific to this overall order.

# Retrieving Stored Records

IRON MOUNTAIN CONNECT

RECORDS MANAGEMENT

Welcome rc2jen USA SUPPORT LOG OUT

Cart

>Retrievals (0)

>Supplies (0)

>Pickups (0)

Retrieval Details

Order Complete

**Thank you! Your order has been submitted.**

An email confirmation will be sent to [jennifer.stackhouse@ironmountain.com](mailto:jennifer.stackhouse@ironmountain.com)

[< Start a New Retrieval Order](#)

**Delivery Address:** First Avenue  
Suite 211  
Floor: 2  
GLEN RIDDLE PA, 19037

**Contact Name & Phone:** Jan & 2156354482

**Carrier:** Iron

**Priority:** 10/12/2

Order Number	Order Type	Record Count	
<a href="#">155526023</a>	Retrieval	(2) Boxes	<a href="#">View Order</a>
FOR RC CALC PROJ DO NOT CHANGE]			
<a href="#">155526021</a>	Retrieval	(2) Files	<a href="#">View Order</a>
<a href="#">155526021</a>	Retrieval	(1) Box	<a href="#">View Order</a>

RC2M2 [RC2M2]

RC2M8 [RC2M8]

Search, Retrieve

Pickups, Add Records

Bulk Upload

Order Supplies

Administration

Track Orders

100%

The user(s) who will receive email confirmation for this order.

Return to the Search Results screen to retrieve additional records.

Entries displayed in blue are clickable links. Click the Order Number to track the order you just completed.

View order details.



# Requesting Unlisted Files

**3** Enter descriptive information that will help Iron Mountain locate the file.

**4** Click Save to List. You are able to enter multiple requests for different files in the box.

**5** Click Add to Cart. Your unlisted file request is added to the cart.

**i** Edit and remove requests. For additional information on IOD and XOD requests, refer to the Requesting an IOD

The screenshot shows the Iron Mountain Records Management interface. At the top, there's a navigation bar with 'Welcome rc2jen', 'USA', 'SUPPORT', and 'LOG OUT'. Below that, the 'RECORDS MANAGEMENT' section is active. A search bar is on the left. The main area contains a form for 'Requesting Unlisted Files' with fields for 'File Description 1' and 'File Description 2'. Below the form is a table titled '(2) Unlisted File Request' with columns for 'File Description 1', 'File Description 2', and 'Action'. The table contains two rows of requests. To the right of the table is a sidebar with 'Action' buttons like 'Filter', 'Add to Cart', and 'Action'. At the bottom, there's a footer with 'Page 1 of 500' and 'Per Page: 10'.

# Requesting Unlisted Files

IRON MOUNTAIN CONNECT

Welcome rc2tom USA SUPPORT LOG OUT

RECORDS MANAGEMENT

Search Search Tools 5,000 Results of 71,473 Help Retrievals (3) Reset View Export

Request Unlisted Open Shelf File

Your search results returned 71,473 records, which exceed the limit of 500 records. Please refine your search or view all results in the grid below.

6 Continue with steps 5 -13 from the [Retrieving Stored Records](#) section to process the retrieval order containing the unlisted file request. Each request displays as a line item on the order.

Item Type	SKP Barcode	Customer	Department	Location	Item Description	Quantity	Unit Price	Total Price	Location	Action
BOX	12023	JSRC2 [SRVC CF_BC=B,RMT=5]	LAW [DIVISION ONE, LAW FORMAT]	DIVONE [DIVISION ONE]		12023			At Iron Mountain	Add to Cart Action
BOX	12024	JSRC2 [SRVC CF_BC=B,RMT=5]	LAW [DIVISION ONE, LAW FORMAT]						At Iron Mountain	Remove Action
BOX	12025	JSRC2 [SRVC CF_BC=B,RMT=5]	MASTER DEPARTMENT	DIVISION					At Iron Mountain	Add to Cart Action
BOX	12026	JSRC2 [SRVC CF_BC=B,RMT=5]	LAW [DIVISION ONE, LAW FORMAT]	DIVONE [DIVISION ONE]		12026			At Iron Mountain	Add to Cart Action
BOX	12028	JSRC2 [SRVC CF_BC=B,RMT=5]	LAW [DIVISION ONE, LAW FORMAT]	DIVONE [DIVISION ONE]		12028			At Iron Mountain	Add to Cart Action

7 Your unlisted file request displays. Click the link to view, edit or remove the request.

Search, Retrieve

Pickups, Add Records

Bulk Upload

Order Supplies

Administration

Track Orders

Page 1 of 500 Per Page: 10

Displaying 1 - 10 of 5000 100%

# Requesting Unlisted Open Shelf Files

IRON MOUNTAIN RECORDS MANAGEMENT

Welcome rc2jen USA SUPPORT LOG OUT

Retrievals (7)

Search

Record Type: All Boxes Files

Customer: ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]

Dept Custom: All

Status: All

File Group: Select

Search

Request Unlisted Open Shelf File

Your search results return records, which exceeds the 5,000 record limit.

Item	SKP Barcode	Alpha From	Customer Box Num...	Status	Action
FILE ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]	20020020003-173	FROM5	ABCD113	At Iron Mountain	Filter, Add to Cart, Action
FILE ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]	20020020003-180		ABCD113	At Iron Mountain	Add to Cart, Action
FILE ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]	20020020003-181		ABCD113	At Iron Mountain	Add to Cart, Action
FILE ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]	20020020003-198		ABCD113	At Iron Mountain	Add to Cart, Action
FILE ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]	20020020003-193		ABCD113	At Iron Mountain	Add to Cart, Action
FILE ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]	20020020003-185		ABCD113	At Iron Mountain	Add to Cart, Action
FILE ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]	20020020003-194		ABCD113	At Iron Mountain	Add to Cart, Action

Page 1 of 500 Per Page: 10

Displaying 1 - 10 of 5000

1 Follow steps 1 and 2 in the [Retrieving Stored Records](#) section.

2 Select Request Unlisted Open Shelf File.

i An unlisted open shelf file is a file that is stored on a shelf and does not yet have an associated file record.

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



# Requesting Unlisted Open Shelf Files

**3** Select a Customer.

**4** Select one or more File Groups.

**5** Click Save to List. You are able to enter multiple requests for different files in the box.

**6** Enter descriptive information that will help Iron Mountain locate the file. Note that File Description 1 defaults from the Keyword field in your search.

**7** Click Add to Cart. Your unlisted open shelf file request is added to the cart.

**i** Edit and remove requests.

Request Unlisted Open Shelf File

Request an unlisted file that is stored at Iron Mountain. Enter identifying information to locate the unlisted file, then click Save to List. Once saved, use the edit and delete buttons to modify the request.

\*Customer (lock)  
ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]

\*File Group (multiple selections allowed) (lock)  
STD GROUP, OTHERS

Save to List

File Description 1  
Medical

\*File Description 2 (lock)  
Bob Stevers mri 2013

(2) Unlisted File Request

Customer	File Group	File Description 1	File Description 2	Action
ABC	OTHERS	Medical	Bob Stevers cat scan 2013	
ABC	STD GROUP	Medical	Bob Stevers x-ray 2013	

Add to Cart Cancel

Order Supplies  
Administration  
Track Orders

Page 1 of 8 Per Page: 10

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Change zoom level

# Requesting Unlisted Open Shelf Files

8

Continue with steps 5 -13 in the [Retrieving Stored Records](#) section to process the retrieval order containing the unlisted open shelf file request. Each request displays as a line item on the order.

i

Each unlisted open shelf file request displays as a separate line item in the Items step of the retrieval order wizard. Click the link to view, edit or remove the request.

Cart

Help

&gt;Retrievals (4)

&gt;Supplies (0)

&gt;Pickups (0)

\*Bill To Department: DEPT D [MEDICAL DEPARTMENT]

Apply Chargeback: MEDREC

Instructions:

\*PO Number: AR-102015-238

 \* Medical

Unlisted Open Shelf File Requested from STD GROUP

Remove

Requested for  
Stackhouse,Jen [Change User](#)Chargeback  
MEDREC

Item Instructions

Retrieval Method  
Checkout[Edit/Review Unlisted Open Shelf File Request](#) \* Medical

Unlisted Open Shelf File Requested from OTHERS

Remove

More &gt;&gt;

Requested for  
Stackhouse,Jen [Change User](#)Chargeback  
MEDREC

Item Instructions

Retrieval Method  
Checkout[Edit/Review Unlisted Open Shelf File Request](#) \* Medical

Unlisted Open Shelf File Requested from OTHERS

Remove

More &gt;&gt;

Requested for  
Stackhouse,Jen [Change User](#)Chargeback  
MEDREC

Item Instructions

Retrieval Method  
Checkout[Edit/Review Unlisted Open Shelf File Request](#) \* Medical

Unlisted Open Shelf File Requested from STD GROUP

Remove

More &gt;&gt;

Requested for  
Stackhouse,Jen [Change User](#)Chargeback  
MEDREC

Item Instructions

Retrieval Method  
Checkout[Edit/Review Unlisted Open Shelf File Request](#)

Search, Retrieve

Pickups, Add Records

Bulk Upload

Order Supplies

Administration

Track Orders

# Adding and Removing Large Quantities (Bulk Actions)

Search 5,000 Results of 71,473

Retrievals (1)

**Select Request Unlisted File(s) to quickly request multiple unlisted files. Refer to Requesting Unlisted Files for more information.**

**Click the Select All checkbox (located at the top of the column of checkboxes) to select all records currently displayed on screen.**

- Add to Cart
- Remove from Cart
- Request Unlisted File(s)
- Request IOD
- Request XOD
- Multi-Item Edit

**Select Add to Cart or Remove from Cart to add and remove quantities of records to and from the cart with a single click. This action will be applied to ALL selected records.**

**Select multiple records. The Action dropdown above the results list becomes active.**

Customer Box Number	Action
Type here then click filter	Filter
<input type="checkbox"/> JSRC2 [SRVC CF,BC=B,RMT=5] LAW [DIVISION ONE, LAW FORMAT] At Iron Mountain DIVONE [DIVISION ONE] 12021	Add to Cart Action
<input type="checkbox"/> JSRC2 [SRVC CF,BC=B,RMT=5] LAW [DIVISION ONE, LAW FORMAT] At Iron Mountain DIVONE [DIVISION ONE] 12022	Add to Cart Action
<input checked="" type="checkbox"/> BOX 12023 JSRC2 [SRVC CF,BC=B,RMT=5] LAW [DIVISION ONE, LAW FORMAT] At Iron Mountain DIVONE [DIVISION ONE] 12023	Add to Cart Action
<input checked="" type="checkbox"/> BOX 12024 JSRC2 [SRVC CF,BC=B,RMT=5] LAW [DIVISION ONE, LAW FORMAT] At Iron Mountain DIVONE [DIVISION ONE] 12024	Remove Action
<input checked="" type="checkbox"/> BOX 12025 JSRC2 [SRVC CF,BC=B,RMT=5] MASTER DEPARTMENT At Iron Mountain MASTER DIVISION 12025	Add to Cart Action
<input checked="" type="checkbox"/> BOX 12026 JSRC2 [SRVC CF,BC=B,RMT=5] LAW [DIVISION ONE, LAW FORMAT] At Iron Mountain DIVONE [DIVISION ONE] 12026	Add to Cart