Retrieving Records
# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview</td>
<td>3</td>
</tr>
<tr>
<td>Retrieving Stored Records</td>
<td>4</td>
</tr>
<tr>
<td>Requesting Unlisted Files</td>
<td>11</td>
</tr>
<tr>
<td>Requesting Unlisted Open Shelf Files</td>
<td>14</td>
</tr>
<tr>
<td>Adding and Removing Large Quantities (Bulk Actions)</td>
<td>17</td>
</tr>
</tbody>
</table>
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

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

2. Enter a Keyword and set additional filters as necessary. Refer to the Searching training guide for more detailed information on using Search functionality.
Retrieving Stored Records

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

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

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.

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.

9. Click Next to move to the Retrieval Details step in the order wizard and enter shipping information.
Empty the cart and restart the retrieval process.

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

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.

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.

Enter any instructions that are specific to this overall order.

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

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

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

Return to the Search Results screen to retrieve additional records.

View order details.
### Requesting Unlisted Files

An unlisted file is a file that is stored in a box and does not yet have an associated file record.

1. Follow steps 1 and 2 in the **Retrieving Stored Records** section.

2. Select Request Unlisted File from the Action dropdown of the box you need Iron Mountain to retrieve a file/files from.
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.

- Edit and remove requests.
- For additional information on IOD and XOD requests, refer to the Requesting an IOD.
Requesting Unlisted Files

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.

Your unlisted file request displays. Click the link to view, edit or remove the request.
1. Follow steps 1 and 2 in the **Retrieving Stored Records** section.

2. Select Request Unlisted Open Shelf File.

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

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.
Adding and Removing Large Quantities (Bulk Actions)

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

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 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.