

**RECORDS MANAGEMENT PORTAL**

USER GUIDE



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## 1.0 RECORDS MANAGEMENT PORTAL

### 1.1 Introduction

Iron Mountain's Records Management Portal is a 24/7 web based management system which offers you everything you need to manage your records.

As an Iron Mountain customer, you will have the opportunity to use the Records Management Portal to:

- Place Orders
- Manage Inventory
- View Detailed Reports
- Order Supplies

The Portal can also be set up to 'mirror' your organisation's processes. For example, your identifiers can be used to capture data on items allowing an easy search of inventory to find critical information.

The Portal can also be used to organise your inventory by department, business group, and cost centre.

The benefits of using the Portal include:

- **Visibility and Accessibility:** You can view your items online 24 hours a day, seven days a week.
- **Decision Support:** The Portal can be used as a management support tool. It allows you to determine factors such as retrieval frequencies, usage patterns, destruction dates and appropriate service levels.
- **Process Efficiency:** Users can save preferences such as default accounts, field names, commonly used addresses and search options.
- **Context Sensitive Help:** Every screen includes a context-sensitive online help button.
- **Customised Features:** Which include customisable user setup, shopping cart, support for unregistered items, order approval work flow, document level inventory and ReView integration.

### 1.2 Getting Started

To get started, complete the Records Management Online Access form located in the Support Page on the [www.ironmtn.com.au](http://www.ironmtn.com.au) or [www.ironmountain.co.nz](http://www.ironmountain.co.nz).

This form is to be used to add, edit or delete users. All requests are to be submitted in writing to our Iron Mountain Service Delivery Team via an authorised user.

# RECORDS MANAGEMENT PORTAL USER GUIDE



## Records Management - Online Access Form

Please complete ALL steps below and email the completed form to: Please select

### STEP 1

Contact Name:		Contact Phone No.:	
Contact Email Address:		Date:	
Company Name:		State:	

### STEP 2

Please complete the table below of Users to be Added, Modified or Deactivations, use the coding system below for the field Action:  
C = Update the email address or Web Security Level  
I = Make the User Inactive  
N = New User to be added  
A = Add an Account to an existing User  
R = Remove Account for an Existing User  
D = Delete the User

First Name	Last Name	Email Address	Iron Mountain Level 1 and Level 2/3 account numbers:	Web User Security Level (please refer to the below table)	Action

Additional Comments

1. Enter your details in so that we can contact you once the users have been updated.

2. Provide details of users including name, email address and the accounts you would like the user to access. If you are adding multiple accounts for a user, you can enter these in to the additional comments box. In the action column, indicate if you would like the user to be 'Added', 'Modified' or 'Deleted'.

The security level will need to be provided for each staff member and will determine what actions the individual is allowed to perform.

Please use the table below to determine which Web User Security Level Access each user requires, a detailed explanation of each is overleaf:

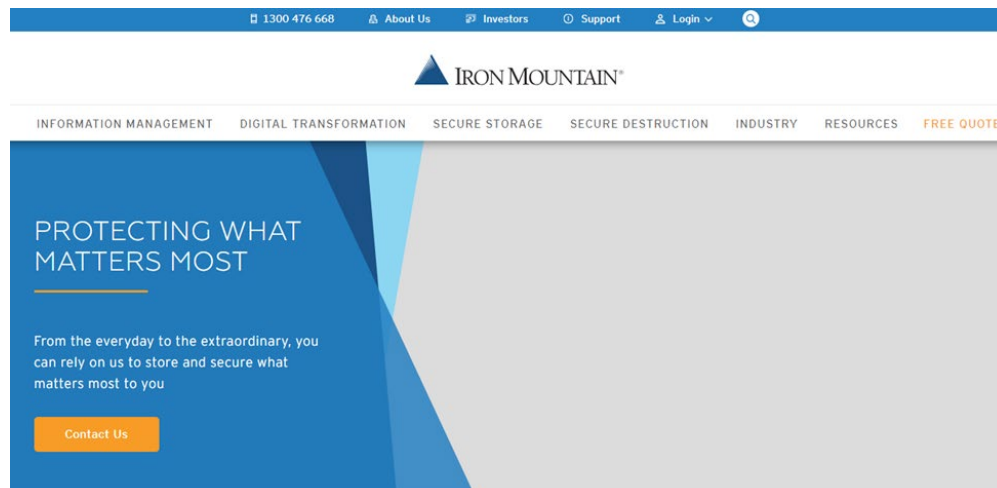
Web User Security Level	Set personal preferences	Check status of orders	Search Carton/ File database	Edit Existing Carton/ File Details	Place order (no approval needed)	Create & Submit Pending Delivery/ Collection Order	Create & Submit Pending Perm out/ Destruction Order	Approve Pending Orders	Add Online - See Own Pending	Add Online - View All Pending
Level 0	✗	✓	✓	✗	✗	✓	✗	✗	Charges may apply	✗
Level 1	✓	✓	✓	✗	✗	✓	✗	✗	✗	✗
Level 2	✓	✓	✓	✗	✗	✓	✗	✗	✗	✗
Level 3	✓	✓	✓	✗	✓	N/A	✓	✗	✗	✗
Level 4	✓	✓	✓	✓	✓	N/A	✓	✗	✓	✗
Level 5	✓	✓	✓	✓	✓	N/A	✓	✓	✓	✗
Level 6	✓	✓	✓	✓	✓	N/A	✓	✓	✓	✓

## Records Management Online Access Form - Descriptions

Set Personal Preferences	<p>A user can save individual settings and preferences such as their default account charge account, phone number and frequently used addresses.</p> <p>This function is only available for users with a 1 – 6 web security level.</p>
Check Status of Orders	<p>A user can review previous service orders placed with Iron Mountain to determine (limited) content and status information.</p>
Search Carton / File Database	<p>A user can search the inventory database of the items managed by Iron Mountain (based on their account security).</p>
Edit Existing Carton	<p>Item by item, a user can add, modify and delete certain indexes associated with their inventory items (based on their account security) such as Alternate ID, Contents, User Defined Fields (UDF).</p> <p>This functionality is available for users with a web security level of 2, 4, 5 or 6.</p>
Place Order	<p>A user can place service requests for collections, deliveries, etc.</p> <p>This functionality is only available for users with a web security level of 3 or higher.</p>
Create and Submit	<p>Users will be able to create orders, but when they submit the order an approval process is performed where designated customer representatives are required to acknowledge the orders prior to them being placed with Iron Mountain.</p> <p>This functionality is for users with a web security level of 0, 1 or 2 only.</p>
Approve Pending Orders	<p>Users with access to this feature are able to review, amend and approve Service Requests submitted by lower security level staff in their organisation.</p> <p>This functionality is available for users with a web security level of 5 or 6.</p>
See Own Pending	<p>View or edit pending items that they have added through Add Online.</p> <p>This functionality is available for users with a web security level of 2, 4, 5 or 6.</p>
View All Pending	<p>View or edit all pending items that have been added including the items added by other members or your organisation.</p> <p>This functionality is only available for users with a level 6 web security level.</p>

## 1.3 Logging into the Records Management Portal

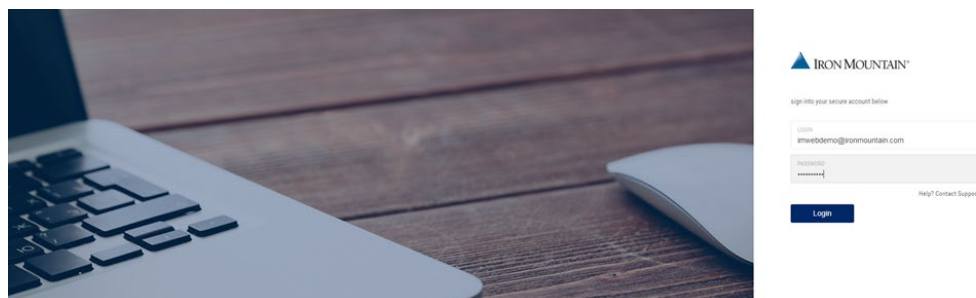
- a. Enter <http://www.ironmtn.com.au> or [www.ironmountain.co.nz](http://www.ironmountain.co.nz)
- b. Click 'Login'



- c. Select 'Iron Mountain Records Management Portal' from the drop-down menu



- d. Enter your login and password



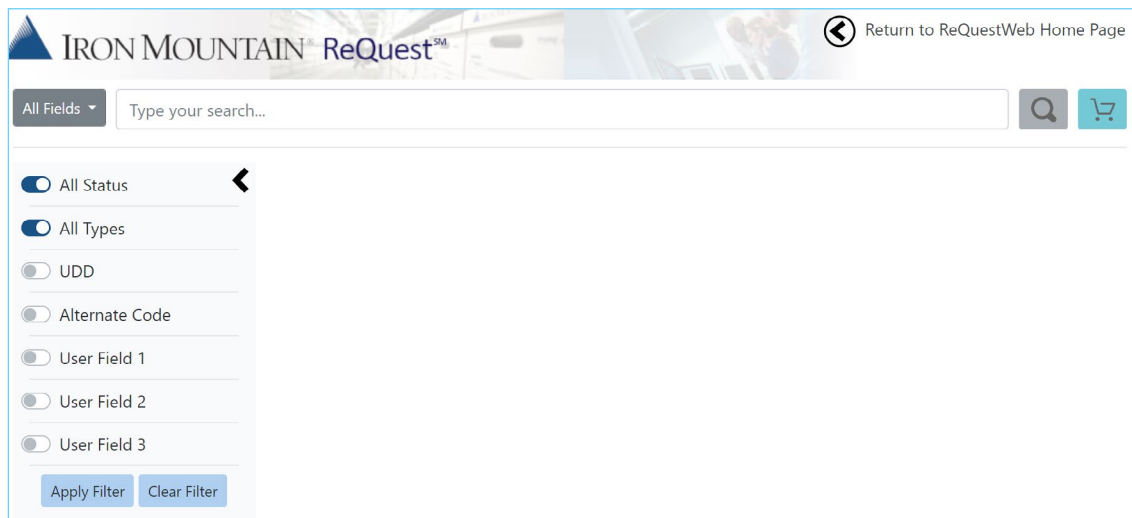
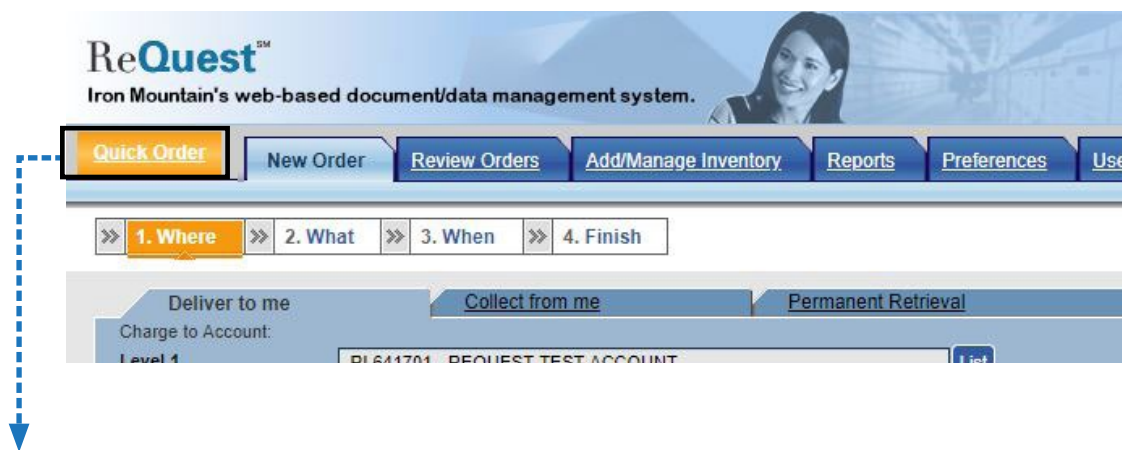
NB - If you are using the portal and have issues using the link from the Iron Mountain site, please use the following link - [portal.au.ironmountain.com](http://portal.au.ironmountain.com)

## 2.0 PLACING AN ORDER

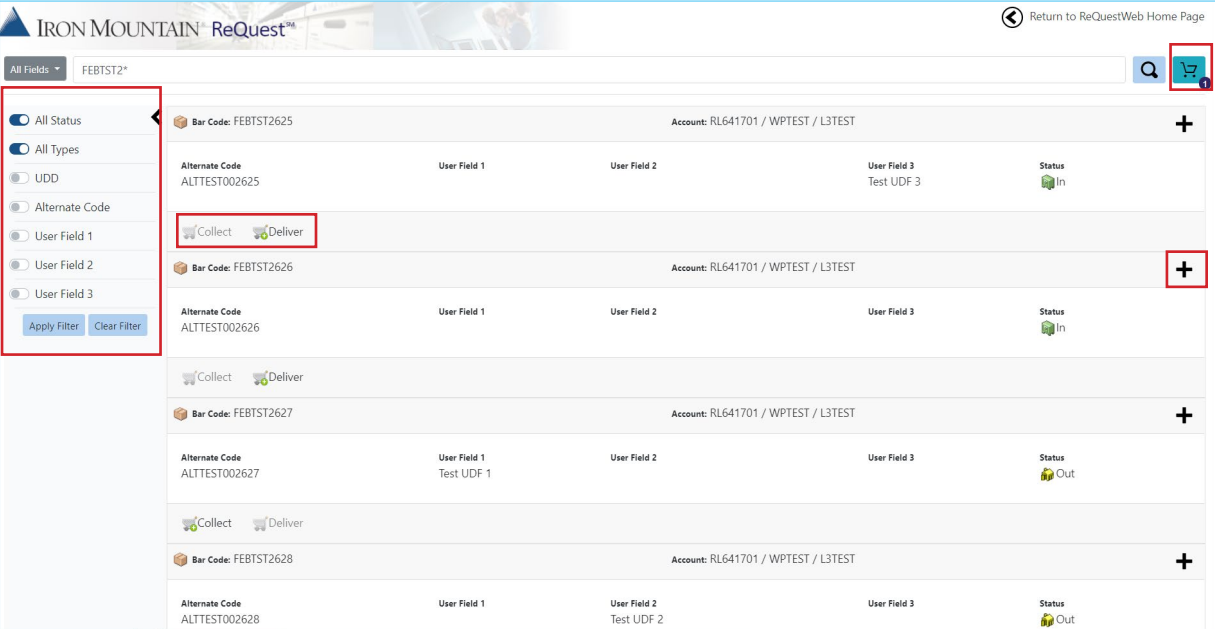
### 2.1 Quick Order

This is a brand new feature that allows searching across level 1 accounts, filtering search items, a modern look and a much faster order experience. Contact information is carried over and does not need to be gathered in the traditional manner by completing the 'Where', 'What', and 'When' steps.

Now you will be able to search across level 1 accounts in Quick Order located on the main ReQuestWeb page.

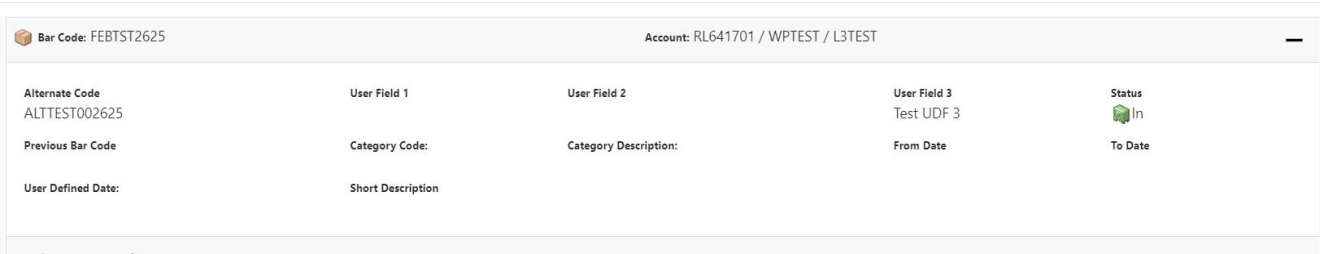


**Quick Order** will skip the 'Where', 'What', and 'When' steps. You can start searching and adding items to your cart.



The screenshot shows the Iron Mountain ReQuest portal interface. At the top, there is a search bar with the text "FEBTST2\*" and a magnifying glass icon. To the right of the search bar is a shopping cart icon. Below the search bar, there is a list of records. Each record has a "Bar Code" and an "Account" (RL641701 / WPTEST / L3TEST). The records are displayed in a table format with columns for "Alternate Code", "User Field 1", "User Field 2", "User Field 3", and "Status". The first record has an "Alternate Code" of "ALTTEST002625" and a status of "In". The second record has an "Alternate Code" of "ALTTEST002626" and a status of "In". The third record has an "Alternate Code" of "ALTTEST002627" and a status of "Out". The fourth record has an "Alternate Code" of "ALTTEST002628" and a status of "Out". To the left of the table, there is a filter panel with several toggle switches: "All Status", "All Types", "UDD", "Alternate Code", "User Field 1", "User Field 2", and "User Field 3". Below these switches are buttons for "Apply Filter" and "Clear Filter". At the bottom of the filter panel, there are "Collect" and "Deliver" icons. A red box highlights the "Collect" and "Deliver" icons. A blue dashed arrow points from the "+" icon in the second record's row to the expanded record view below.

Bar Code	Account	Alternate Code	User Field 1	User Field 2	User Field 3	Status
FEBTST2625	RL641701 / WPTEST / L3TEST	ALTTEST002625			Test UDF 3	In
FEBTST2626	RL641701 / WPTEST / L3TEST	ALTTEST002626				In
FEBTST2627	RL641701 / WPTEST / L3TEST	ALTTEST002627	Test UDF 1			Out
FEBTST2628	RL641701 / WPTEST / L3TEST	ALTTEST002628		Test UDF 2		Out



The screenshot shows the expanded record view for Bar Code FEBTST2625. The record is displayed in a table format with columns for "Alternate Code", "User Field 1", "User Field 2", "User Field 3", and "Status". The "Alternate Code" is "ALTTEST002625" and the status is "In". Below the main table, there is a section for "Previous Bar Code" and "User Defined Date".

Alternate Code	User Field 1	User Field 2	User Field 3	Status
ALTTEST002625			Test UDF 3	In

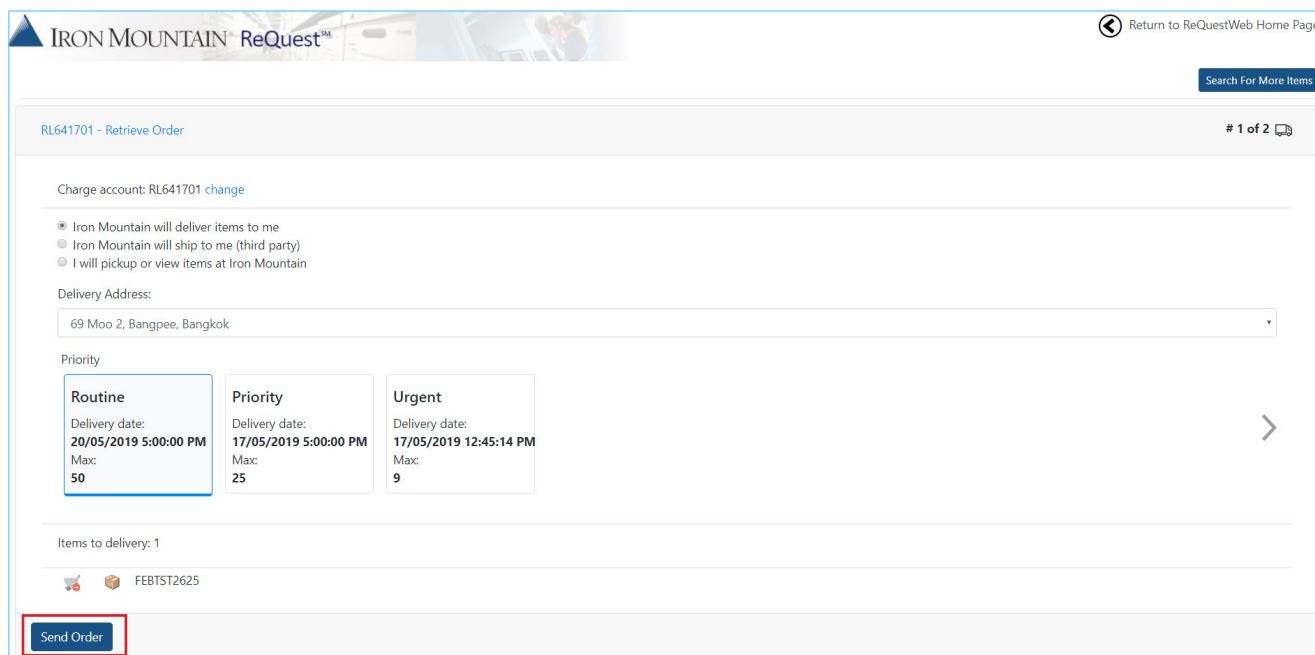
Previous Bar Code: Category Code: Category Description: From Date To Date

User Defined Date: Short Description

**Quick Order** offers a filter function once an initial search is done. It provides asset status and allows you to select the 'Collect' or 'Deliver' option. The '+' sign allows for additional metadata to be displayed quickly.



Items selected for collection or delivery will automatically update the shopping cart.



The screenshot shows the 'IRON MOUNTAIN ReQuest' portal. At the top, there is a navigation bar with the Iron Mountain logo and a 'Return to ReQuestWeb Home Page' link. Below the navigation bar, there is a search bar labeled 'Search For More Items'. The main content area is titled 'RL641701 - Retrieve Order' and shows a form for retrieving an order. The form includes a 'Charge account' field with the value 'RL641701' and a 'change' link. Below this, there are three radio buttons for delivery options: 'Iron Mountain will deliver items to me' (selected), 'Iron Mountain will ship to me (third party)', and 'I will pickup or view items at Iron Mountain'. The 'Delivery Address' field contains '69 Moo 2, Bangpee, Bangkok'. Under the 'Priority' section, there are three options: 'Routine' (delivery date: 20/05/2019 5:00:00 PM, max: 50), 'Priority' (delivery date: 17/05/2019 5:00:00 PM, max: 25), and 'Urgent' (delivery date: 17/05/2019 12:45:14 PM, max: 9). The 'Items to delivery' section shows '1' item, with a shopping cart icon and the item ID 'FEBTST2625'. At the bottom of the form, there is a 'Send Order' button highlighted with a red border.

Once all assets are added to the cart, you can check out by selecting the “Send Order” button.

RL641701 - Retrieve Order submitted: 00766443

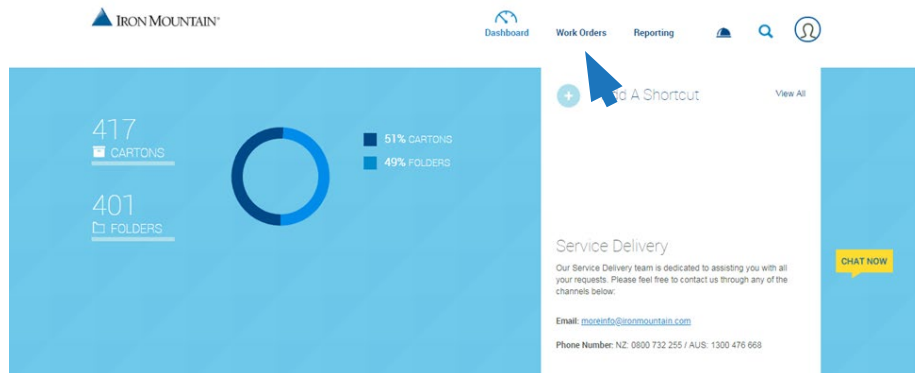
# 1 of 2

You will receive an Order confirmation.

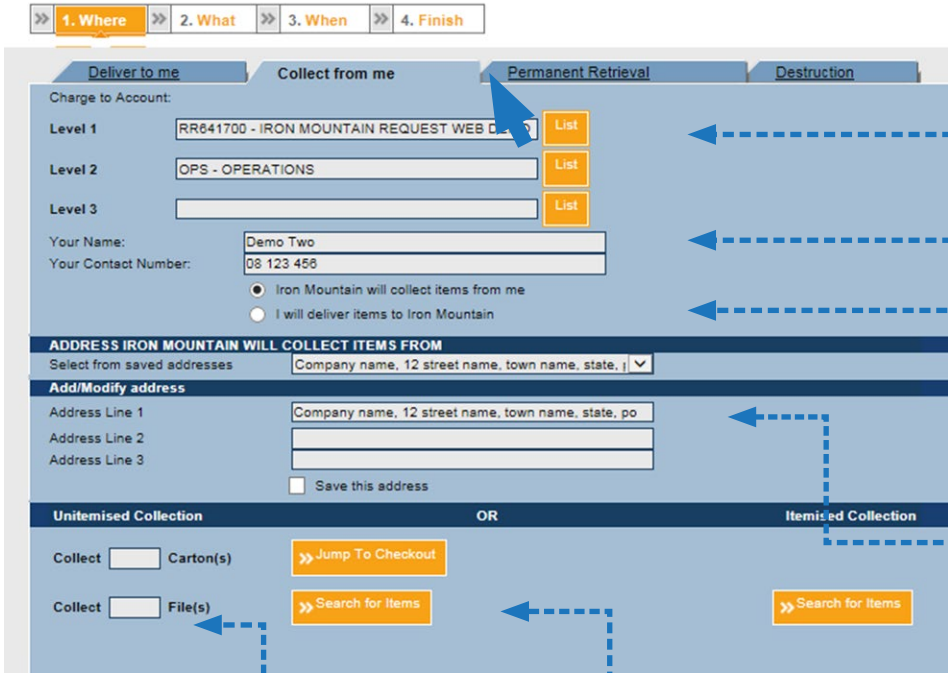


## 2.2 Collections (Non-Itemised)

a. To raise a Work Order or look up items, click on the 'Work Orders' link.



b. Click on 'Collect from me'



>> 1. Where >> 2. What >> 3. When >> 4. Finish

**Deliver to me** **Collect from me** **Permanent Retrieval** **Destruction**

Charge to Account:

Level 1: RR641700 - IRON MOUNTAIN REQUEST WEB D... **List**

Level 2: OPS - OPERATIONS **List**

Level 3: **List**

Your Name: Demo Two

Your Contact Number: 08 123 456

☒ Iron Mountain will collect items from me

☐ I will deliver items to Iron Mountain

**ADDRESS IRON MOUNTAIN WILL COLLECT ITEMS FROM**

Select from saved addresses: Company name, 12 street name, town name, state, |

**Add/Modify address**

Address Line 1: Company name, 12 street name, town name, state, po

Address Line 2:

Address Line 3:

☐ Save this address

**Unitemised Collection** OR **Itemised Collection**

Collect  Carton(s) **>> Jump To Checkout**

Collect  File(s) **>> Search for Items**

**>> Search for Items**

1. Choose your Level 1, 2 or 3 account to charge by selecting 'List'

2. Enter the Requestor's name and phone number

3. Let us know if Iron Mountain will collect from you or you will arrange transport externally

4. Select an address from the drop-down menu or add a new address for collection. If adding a new address, click "Save this address" option.

5. Add the number of items to be collected

6. Click on 'Jump to Checkout'.

c. Review the details of your order

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Collection - Checkout


Collection - Please Select an Option

Service Priority: Routine  
Your order will be completed by: 12:00 PM Tuesday, April 11, 2017  
Work Order local time: 12:39 PM Monday, April 10, 2017  
Maximum items for order type: 50

Routine ☒

Order Supplies Search For More Items Save Order For Later Cancel Order >> Send Order To Iron Mountain

Shopping Cart Contents

Store	(All)	Items	Quantity	Short Description
<input checked="" type="checkbox"/>			1	

Request Unitemised Items

Additional Order Information

Work Order PO Number:

Special Instructions: TESTING SPECIAL INSTRUCTIONS FEATURE.....

Order Supplies Search For More Items Save Order For Later Cancel Order >> Send Order To Iron Mountain

7. The 'Routine' option is the only option available for Collections. For all of the service collection options, refer to your Welcome Pack.

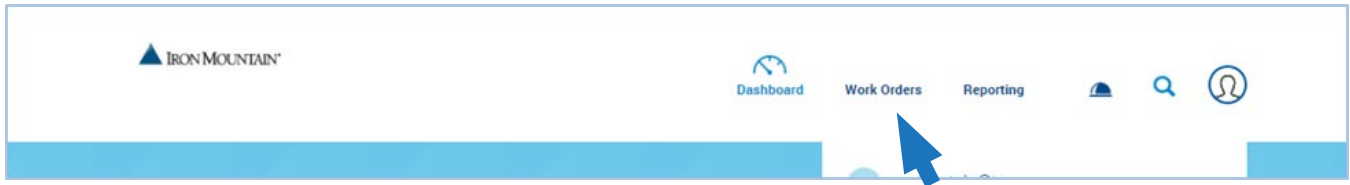
8. Add 'Work Order' PO Number if required

9. Add any special instructions for the driver  
e.g. Use Loading Dock 3

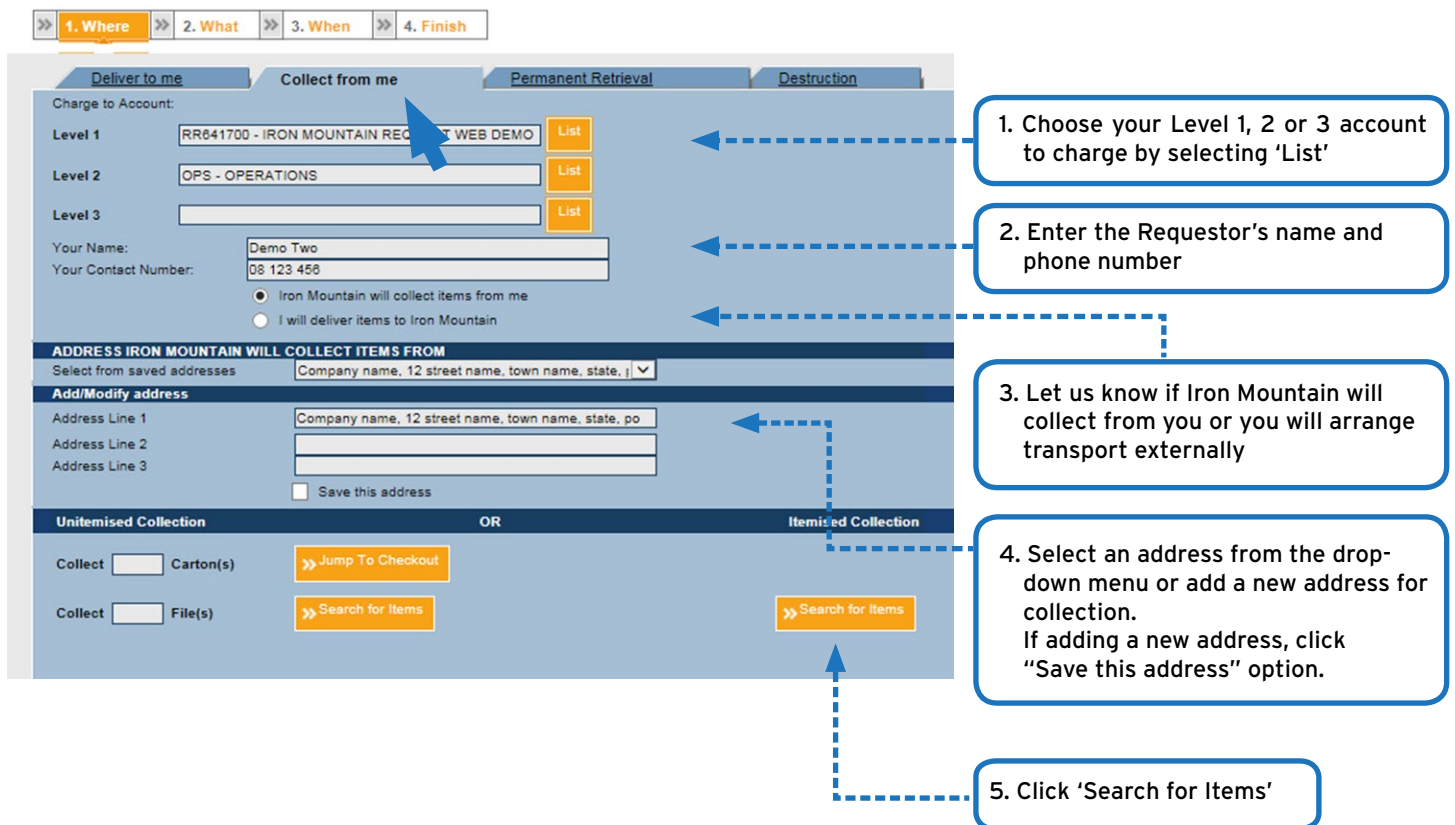
10. Click 'Send Order To Iron Mountain'

## 2.3 Collections (Itemised)

a. Select 'Work Orders'



b. Click on 'Collect from me'

The screenshot displays the 'Collect from me' form within the 'Work Orders' section. The form is divided into several sections: 'Charge to Account' with three levels (Level 1, Level 2, Level 3) each having a 'List' button; 'Your Name' and 'Your Contact Number' fields; a radio button selection for 'Iron Mountain will collect items from me' (selected) or 'I will deliver items to Iron Mountain'; an 'ADDRESS IRON MOUNTAIN WILL COLLECT ITEMS FROM' section with a dropdown menu; an 'Add/Modify address' section with three address lines and a 'Save this address' checkbox; and a bottom section with 'Unitemised Collection' and 'Itemised Collection' options, each with a 'Search for Items' button. Five numbered instructions with arrows point to specific elements: 1. 'Choose your Level 1, 2 or 3 account to charge by selecting 'List'' points to the 'List' button for Level 1. 2. 'Enter the Requestor's name and phone number' points to the 'Your Name' and 'Your Contact Number' fields. 3. 'Let us know if Iron Mountain will collect from you or you will arrange transport externally' points to the radio button selection. 4. 'Select an address from the drop-down menu or add a new address for collection. If adding a new address, click "Save this address" option.' points to the address dropdown and the 'Save this address' checkbox. 5. 'Click 'Search for Items'' points to the 'Search for Items' button in the 'Itemised Collection' section.

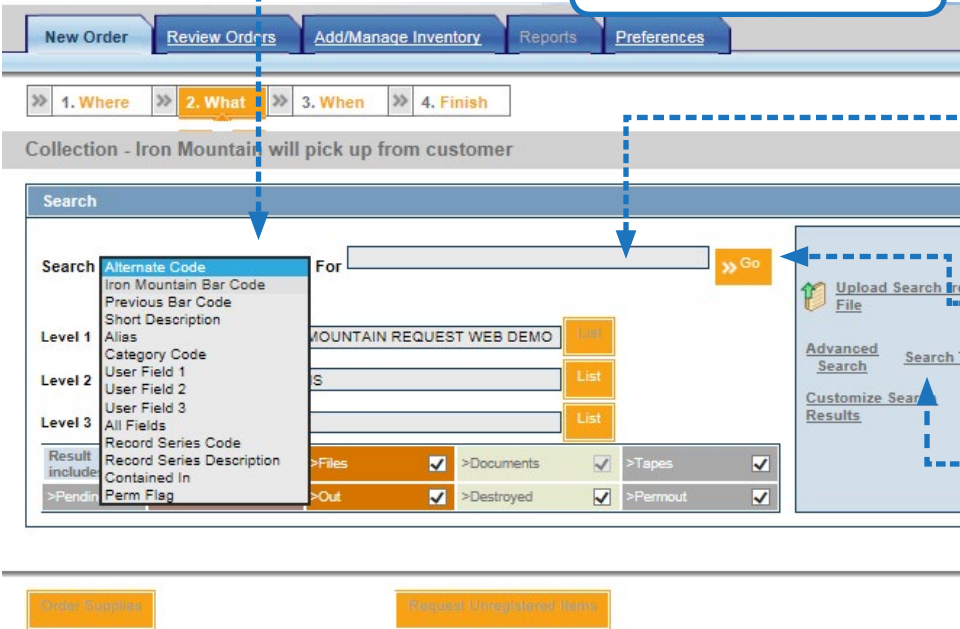
# RECORDS MANAGEMENT PORTAL USER GUIDE

6. Select the database field you wish to search  
e.g. Iron Mountain Barcode

7. Enter the search criteria e.g. Carton Barcode.  
If searching for multiple cartons, separate the cartons with a comma (,).  
A large list of items can be uploaded using the "Upload search from File link".  
The List should be saved as a .txt file format.

8. Press 'Go'


For more tips on searching for items including advanced searches and customising search results, click the 'Search Tips' link.



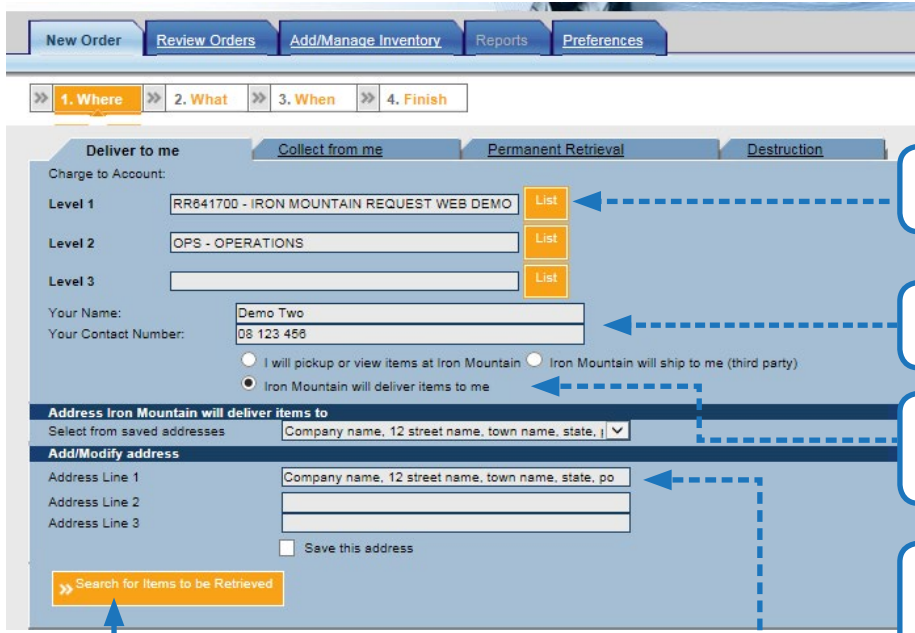
9. Tick the item(s) you want to add to order

10. Click on "Add Selected Items to Cart"

11. If no further items are to be added to the order, click on "Check Out"



## 2.4 Deliveries (Cartons or Files)



The screenshot displays the 'Deliver to me' form in the Iron Mountain Records Management Portal. The form is part of a multi-step process indicated by tabs at the top: 'New Order', 'Review Orders', 'Add/Manage Inventory', 'Reports', and 'Preferences'. Below these, a progress bar shows four steps: '1. Where', '2. What', '3. When', and '4. Finish', with '1. Where' being the active step.

The 'Deliver to me' form includes the following sections and fields:

- Charge to Account:** A section for selecting the account to be charged.
- Level 1:** A text field containing 'RR041700 - IRON MOUNTAIN REQUEST WEB DEMO' and a 'List' button.
- Level 2:** A text field containing 'OPS - OPERATIONS' and a 'List' button.
- Level 3:** A text field and a 'List' button.
- Your Name:** A text field containing 'Demo Two'.
- Your Contact Number:** A text field containing '08 123 456'.
- Delivery Method:** Two radio buttons: 'I will pickup or view items at Iron Mountain' (selected) and 'Iron Mountain will ship to me (third party)'.
- Address Iron Mountain will deliver items to:** A section for selecting or adding a delivery address.
- Select from saved addresses:** A dropdown menu showing 'Company name, 12 street name, town name, state, j'.
- Add/Modify address:** A section for adding a new address.
- Address Line 1:** A text field containing 'Company name, 12 street name, town name, state, po'.
- Address Line 2:** An empty text field.
- Address Line 3:** An empty text field.
- Save this address:** A checkbox.
- Search for Items to be Retrieved:** A button at the bottom left of the form.

Five numbered callouts provide instructions for using the form:

1. Choose your level 1, 2 or 3 account that the items are stored under.
2. Enter the Requestor's name and phone number
3. Let us know if Iron Mountain will deliver the items or you will arrange transport externally
4. Select an address from the drop-down menu or add a new address for delivery. If adding a new address, click the "Save this address" option.
5. Click 'Search for Items To Be Retrieved'

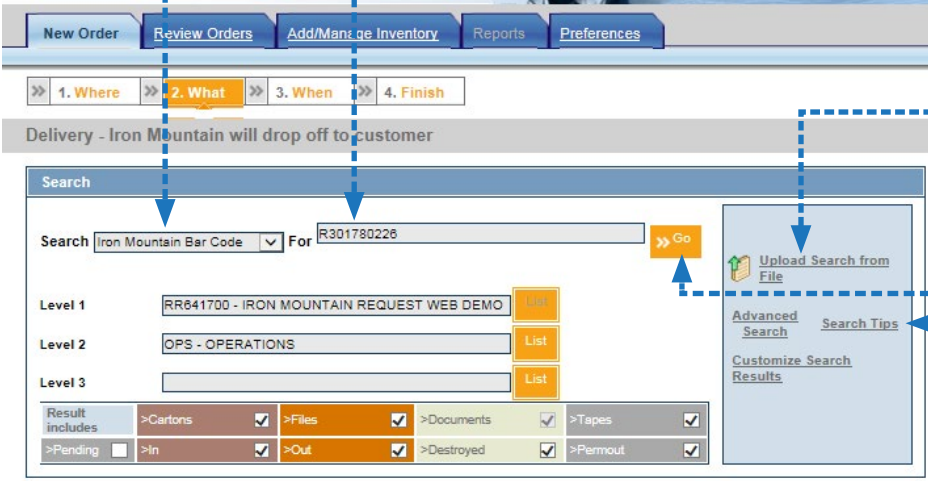
# RECORDS MANAGEMENT PORTAL USER GUIDE

**6. Select the database field you wish to search e.g. Iron Mountain Barcode**




**7. Enter the search criteria e.g. Carton Barcode**  
If searching for multiple cartons, separate the cartons with a comma (,).  
A large list of items can be uploaded using the "Upload Search from File" link. The List is to be saved as a .txt file format.

**8. Click 'Go'**

For more tips on searching for items including advanced searches and customising search results, click the 'Search Tips link'.



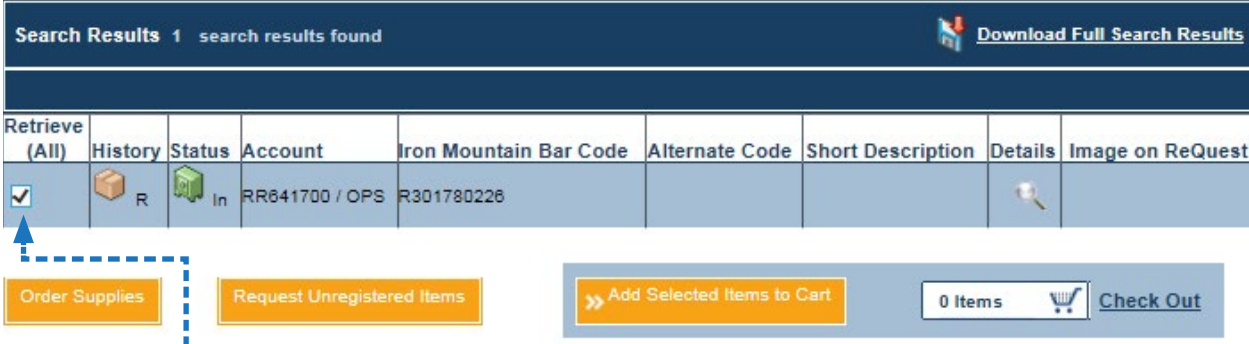
**Search Results 1 search results found** [Download Full Search Results](#)

Retrieve (All)	History	Status	Account	Iron Mountain Bar Code	Alternate Code	Short Description	Details	Image on ReQuest
<input checked="" type="checkbox"/>	 R	 In	RR641700 / OPS	R301780226				

**9. Tick item(s) you want to add to the order**

**10. Click on "Add Selected Items to Cart"**

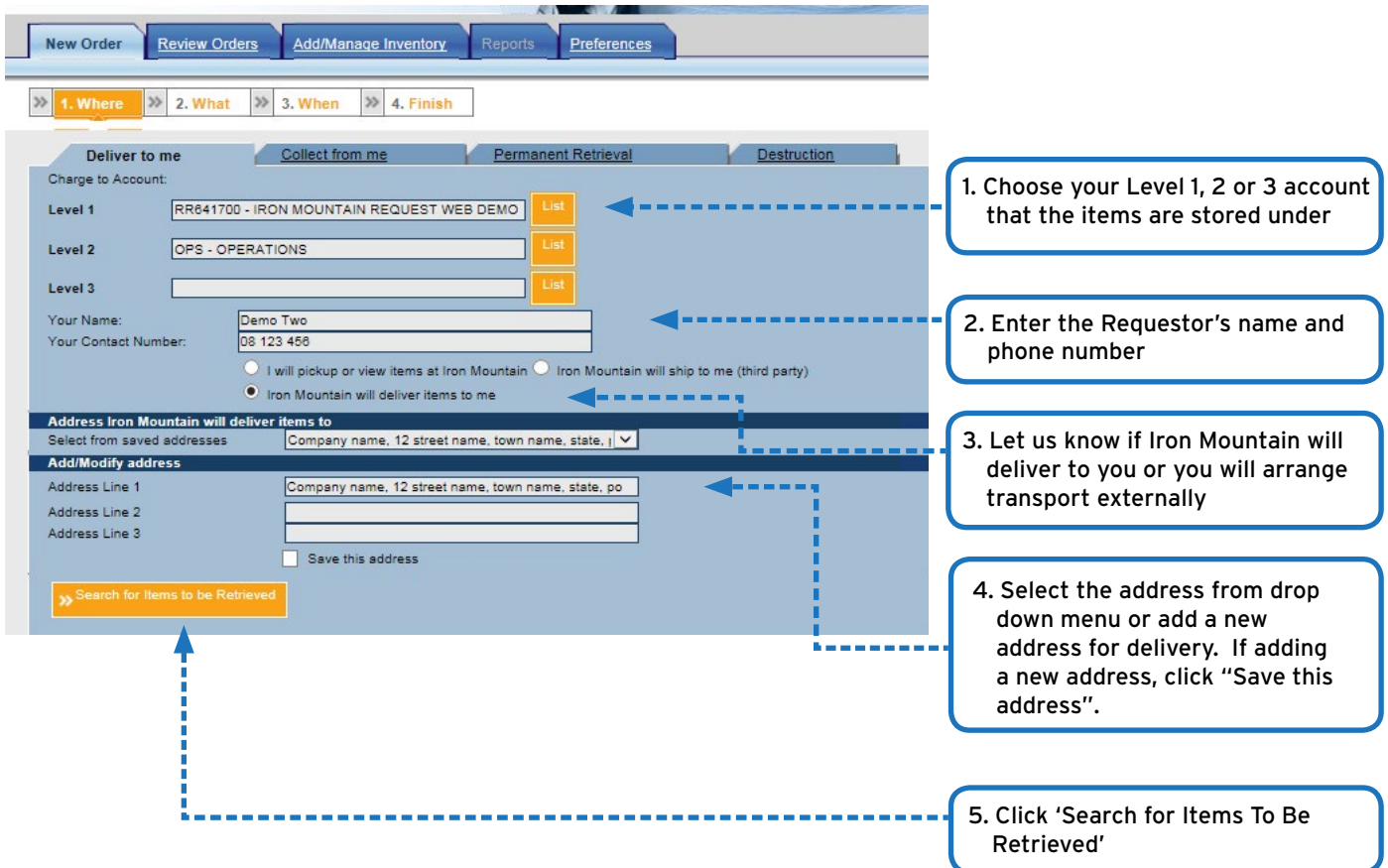
**11. If no further items are to be added to the order click on "Check Out"**





## 2.5 Deliveries (Unregistered Items)

This option is used, if you have a file managed account and would like to request a file out of a carton that has never been retrieved before and is therefore not registered with an Iron Mountain File Barcode.



The screenshot shows the 'Deliver to me' form in the Iron Mountain Records Management Portal. The form is divided into several sections with tabs at the top: 'Deliver to me' (selected), 'Collect from me', 'Permanent Retrieval', and 'Destruction'. Below the tabs are four steps: '1. Where', '2. What', '3. When', and '4. Finish'. The 'Deliver to me' section includes a 'Charge to Account' section with three levels (Level 1, Level 2, Level 3) and a 'List' button next to each. Below this is a 'Your Name' and 'Your Contact Number' section. There are three radio buttons for delivery options: 'I will pickup or view items at Iron Mountain', 'Iron Mountain will ship to me (third party)', and 'Iron Mountain will deliver items to me' (selected). Below the radio buttons is a section titled 'Address Iron Mountain will deliver items to' with a 'Select from saved addresses' dropdown menu. Below this is an 'Add/Modify address' section with three address lines and a 'Save this address' checkbox. At the bottom is a 'Search for Items to be Retrieved' button. Five numbered callouts point to specific parts of the form: 1. 'Choose your Level 1, 2 or 3 account that the items are stored under' points to the Level 1 dropdown. 2. 'Enter the Requestor's name and phone number' points to the 'Your Name' and 'Your Contact Number' fields. 3. 'Let us know if Iron Mountain will deliver to you or you will arrange transport externally' points to the radio buttons. 4. 'Select the address from drop down menu or add a new address for delivery. If adding a new address, click "Save this address".' points to the 'Select from saved addresses' dropdown and the 'Save this address' checkbox. 5. 'Click "Search for Items To Be Retrieved"' points to the 'Search for Items to be Retrieved' button.

1. Choose your Level 1, 2 or 3 account that the items are stored under

2. Enter the Requestor's name and phone number

3. Let us know if Iron Mountain will deliver to you or you will arrange transport externally

4. Select the address from drop down menu or add a new address for delivery. If adding a new address, click "Save this address".

5. Click 'Search for Items To Be Retrieved'

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6. Select the database field  
you wish to search e.g.  
Iron Mountain Barcode

7. Enter the search criteria  
e.g. Carton Barcode

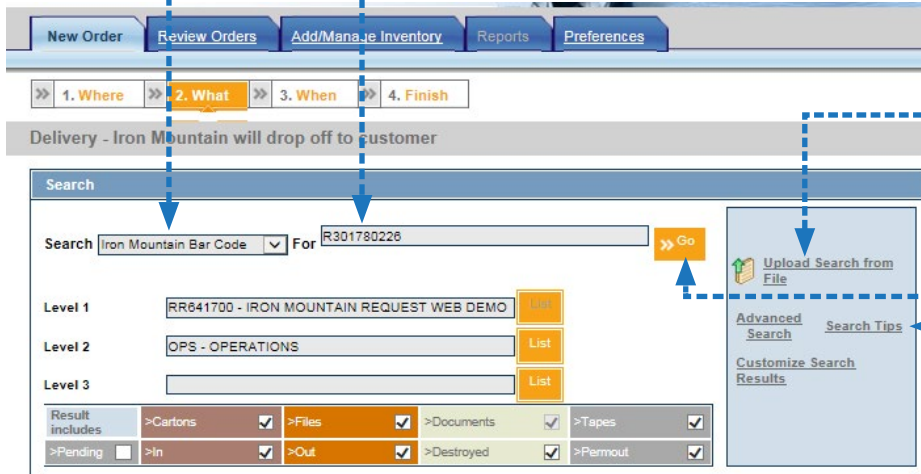
If searching for multiple cartons,  
separate the cartons with a  
comma (,).




A large list of items can be  
uploaded using the "Upload  
Search from File" link.  
The List is to be saved as a .txt  
file format.

8. Click 'Go'

For more tips on searching  
for items including advanced  
searches and customising  
search results, click the  
'Search Tips link'.

9. Click the magnifying glass  
to see inside the carton



Search Results 1 search results found							
<a href="#">Download Full Search Results</a>							
Retrieve (All)	History	Status	Account	Iron Mountain Bar Code	Alternate Code	Short Description	Details
<input checked="" type="checkbox"/>	 R	 In	RR641700 / OPS	R301780226			

[Order Supplies](#)
[Request Unregistered Items](#)
[Add Selected Items to Cart](#)
0 Items
[Check Out](#)



# RECORDS MANAGEMENT PORTAL USER GUIDE

**Item Details**

Status: In  
Iron Mountain Bar Code: R301780226  
Record Series: NONE

Object Code: Carton  
RFID Item: Yes  
Status Date: 11/04/2017  
Add Date: 30/05/2009

Level 1: RR641700 - IRON MOU  
Level 2: OPS - OPERATIONS  
Level 3:

Alternate Code:  
Sequence From:  
Sequence To:  
From Date:  
To Date:  
Category Code:


Set:  
User Field 1: AJ Brown  
User Field 2: Audit  
User Field 3: Jenny Smith  
Previous Bar Code:  
UDD: 1/01/2005  
Destroy Date: 1/01/2015


Hold Codes: ☐ Details  
Permanent: No

Short Description:  
Contents:  
Description:

> Add Selected Items to Cart 0 Items  Check Out

Registered Contents 1 search results found

 Download Full Search Results

Retrieve (All)	Status	Iron Mountain Bar Code	Alternate Code	Short Description	Details
<input type="checkbox"/>	In	5500018767099		Jenny Smith case files	

< Previous Next > ☐ Select

Request Unregistered Items Return To Summary

10. If file is already registered, it will be listed here. Click on the 'Retrieve' box and add selected items to cart.

11. If the file is not listed, select 'Request Unregistered Items'.

# RECORDS MANAGEMENT PORTAL USER GUIDE

**Search**

**Unregistered Item**

Item Type: File

Identifier: DEMO2

**Unregistered Item Parent**

Identifier Type: Iron Mountain Bar Code

Identifier: R301780226

Go

**Search Tips**

Level 1: RR641700 - IRON MOUNTAIN REQUEST WEB DEMO

Level 2: OPS - OPERATIONS

Level 3:

Return to Item Details

12. Add the 'Identifier' information for file. This is the name or identifying information that our Iron Mountain Information Centre team will use to locate the file inside the carton.

13. The 'Unregistered Item Parent' is the barcode or alternate code of the carton that the file will be located in.

**Request Unregistered Items**

**Search**

**Unregistered Item**

Item Type: File

Identifier: DEMO2

**Unregistered Item Parent**

Identifier Type: Iron Mountain Bar Code

Identifier: R301780226

Go

**Search Tips**

Level 1: RR641700 - IRON MOUNTAIN REQUEST WEB DEMO

Level 2: OPS - OPERATIONS

Level 3:

Return to Item Details

Add Selected Items to Cart 0 Items Check Out

**Search Results 1 search results found**

Retrieve	Iron Mountain Bar Code	Item Alternate ID	Item Short Description	Container iron mountain bar code	Container alternate ID	Details
<input checked="" type="checkbox"/>	NOT REGISTERED		DEMO2	R301780226		

Add Selected Items to Cart 0 Items Check Out

15. Tick the checkbox under the 'Retrieve' column

16. Click 'Add Selected Items to Cart'

17. If no further items are to be retrieved, click 'Check Out'

To return to the Carton Details page, select 'Return to Item Details'

Return to Item Details

Add Selected Items to Cart 0 Items Check Out

**Search Results 1 search results found**

Retrieve	Iron Mountain Bar Code	Item Alternate ID	Item Short Description	Container iron mountain bar code	Container alternate ID	Details
<input type="checkbox"/>	NOT REGISTERED	DEMO2		R301780226		

Add Selected Items to Cart 0 Items Check Out

# RECORDS MANAGEMENT PORTAL USER GUIDE

To return to the search screen to locate further cartons or files, select 'Return to Summary'

<< Previous   Next >>   Request Unregistered Items   Return To Summary

**Item Details**


**Delivered - Please Select an Option**

Service Priority: Scheduled  
Your order will be completed by: 10:30 AM Tuesday, April 18, 2017  
Work Order local time: 11:26 AM Thursday, April 13, 2017  
Maximum items for order type: 10  
Space available on this order: 10

Urgent ☐   Priority ☐   Routine ☒

Order Supplies   Search For More Items   Save Order For Later   Cancel Order   >> Send Order To Iron Mountain

**Shopping Cart Contents**

Retrieve (All)	Items	Account	Iron Mountain Bar Code	Alternate Code	Short Description
<input checked="" type="checkbox"/>		RR641700 / OPS	NOT REGISTERED		DEMO2

Comment:   Requested By:   Cost Center:   Apply to All

20. Add 'Requested By' or 'Cost Centre number' if required.

**Additional Order Information**

Work Order PO Number:   Special Instructions

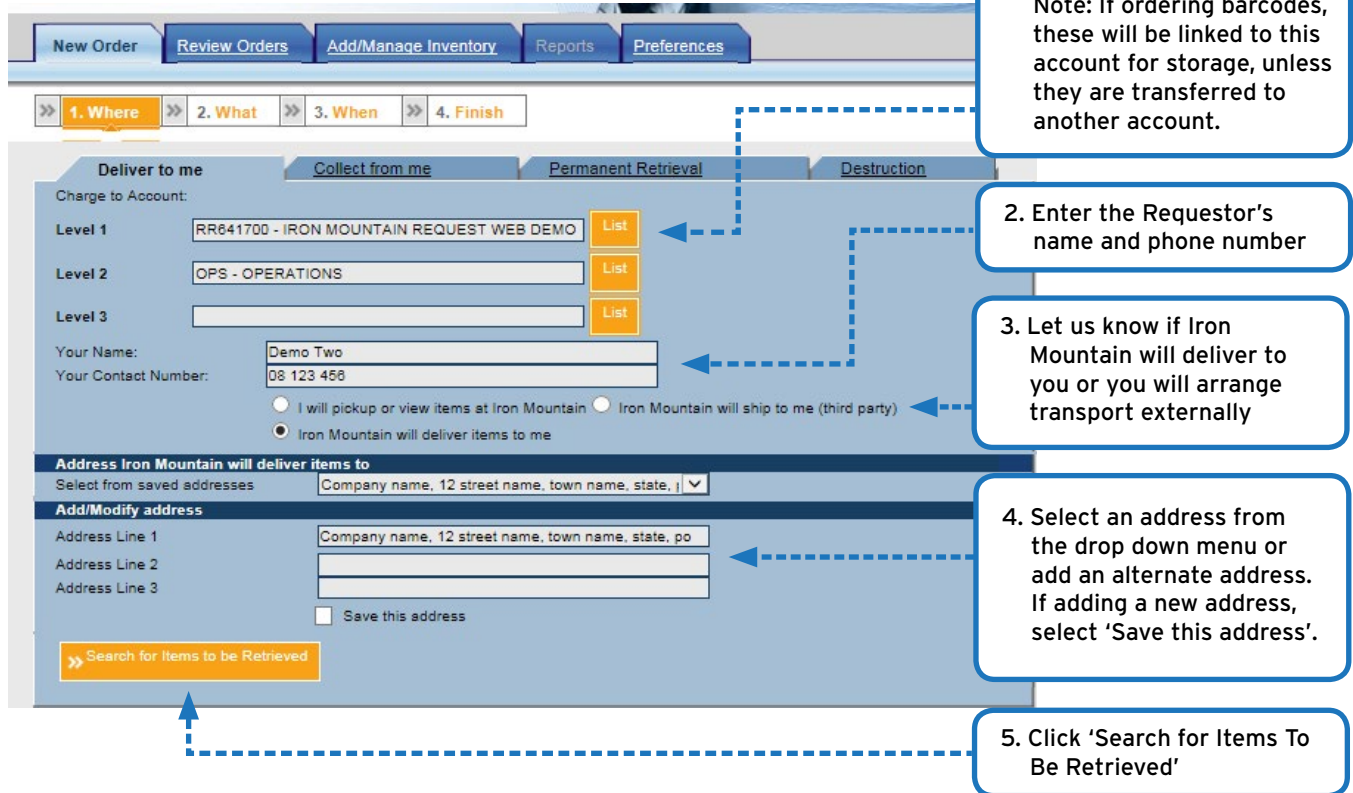
21. Add a Purchase Order Number or any special instructions for the

22. Click 'Send Order to Iron Mountain'

Order Supplies   Search For More Items   Save Order For Later   Cancel Order   > Send Order To Iron Mountain

## 2.6 Ordering Supplies

a. Click on 'Deliver to me'



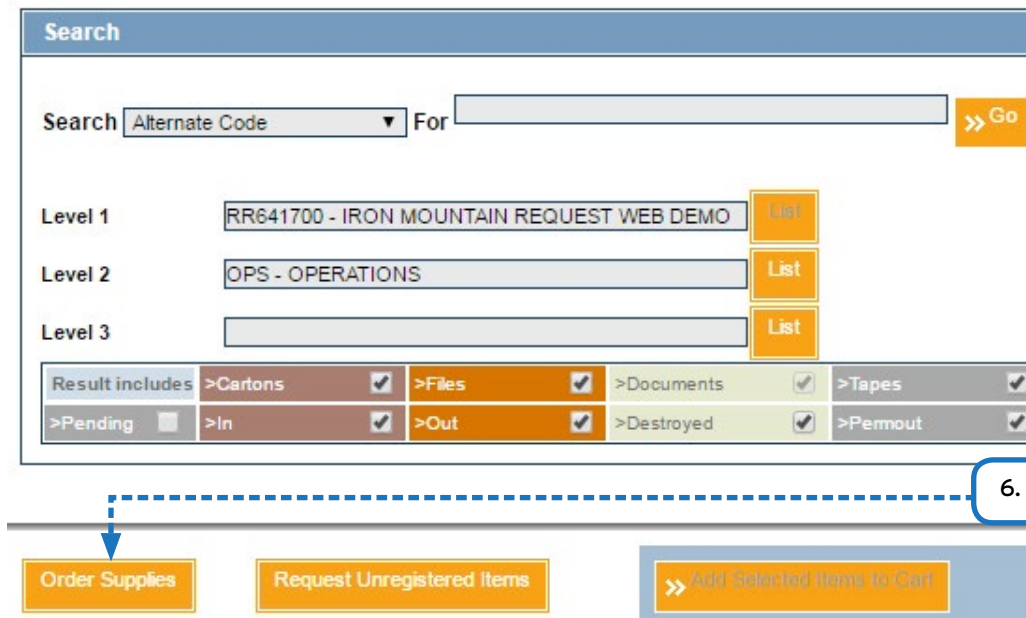
**1.** Choose your level 1, 2 or 3 account that the items are stored under.  
Note: If ordering barcodes, these will be linked to this account for storage, unless they are transferred to another account.

**2.** Enter the Requestor's name and phone number

**3.** Let us know if Iron Mountain will deliver to you or you will arrange transport externally

**4.** Select an address from the drop down menu or add an alternate address. If adding a new address, select 'Save this address'.

**5.** Click 'Search for Items To Be Retrieved'



**6.** Click on 'Order Supplies'

# RECORDS MANAGEMENT PORTAL USER GUIDE

## Order Supplies

Return

> Add Selected Items to Cart

0 Items

7. Enter the number of supplies you require - cartons must be supplied in packs. To order cartons please add the total number to be delivered. E.g. S7030 Bus Ctn (pks 25) - These should be added as 25 for 1 x pack and 50 for 2 packs.

### Order Supplies

	Unit	Description	
5	Each	RFID Carton Tag	
25	Each	S7030 Bus Ctn (pks 25)	
0	Each	S8020 Legal Ctn (pks 25)	
0	Each	S9010 Flat Plan (pks 25)	
0	Each	S9020 Plan Ctn (pks 25)	0
0	Each	File Bar Code Labels	0
0	Each	S1010 Micfrm Ctn (pks 25)	0
0	Each	S2010 File Ctn (pks 25)	0
0	Each	S4030 XRay Ctn (pks 25)	0
0	Each	S5010 Bus Ctn (pks 25)	0

8. Click 'Add Selected Items to Cart'

Return

> Add Selected Items to Cart

0 Items

Check Out

Note: RFID carton tags are the standard barcodes to be applied to any newly lodged cartons. File Barcodes are to be attached to files only and can be ordered on file managed account types.

9. Click 'Check out'.

### Delivered - Please Select an Option

Service Priority: Routine  
Your order will be completed by: 12:00 PM Tuesday, April 18, 2017  
Work Order local time: 11:40 AM Thursday, April 13, 2017  
Maximum items for order type: 50

10. Review your Order Details

Routine



11. The Routine Service Priority is the only option available when ordering supplies and this will be pre-selected for you.

Order Supplies

Search For More Items

Save Order For Later

Cancel Order

>> Send Order To Iron Mountain

### Order Supplies

Quantity	Unit	Description	Total	Comment:	Requested By:	Cost Center:	
25	Each	RFID Carton Tag	25				Apply to All
25	Each	S7030 Bus Ctn (pks 25)	25				Apply to All

12. Add 'Requested By', Cost Centre Numbers or Purchase Order numbers.

### Additional Order Information

Work Order PO Number:

Special Instructions

13. Add any 'Special Instructions' for the courier if required.

Order Supplies

Search For More Items

Save Order For Later

Cancel Order

> Send Order To Iron Mountain

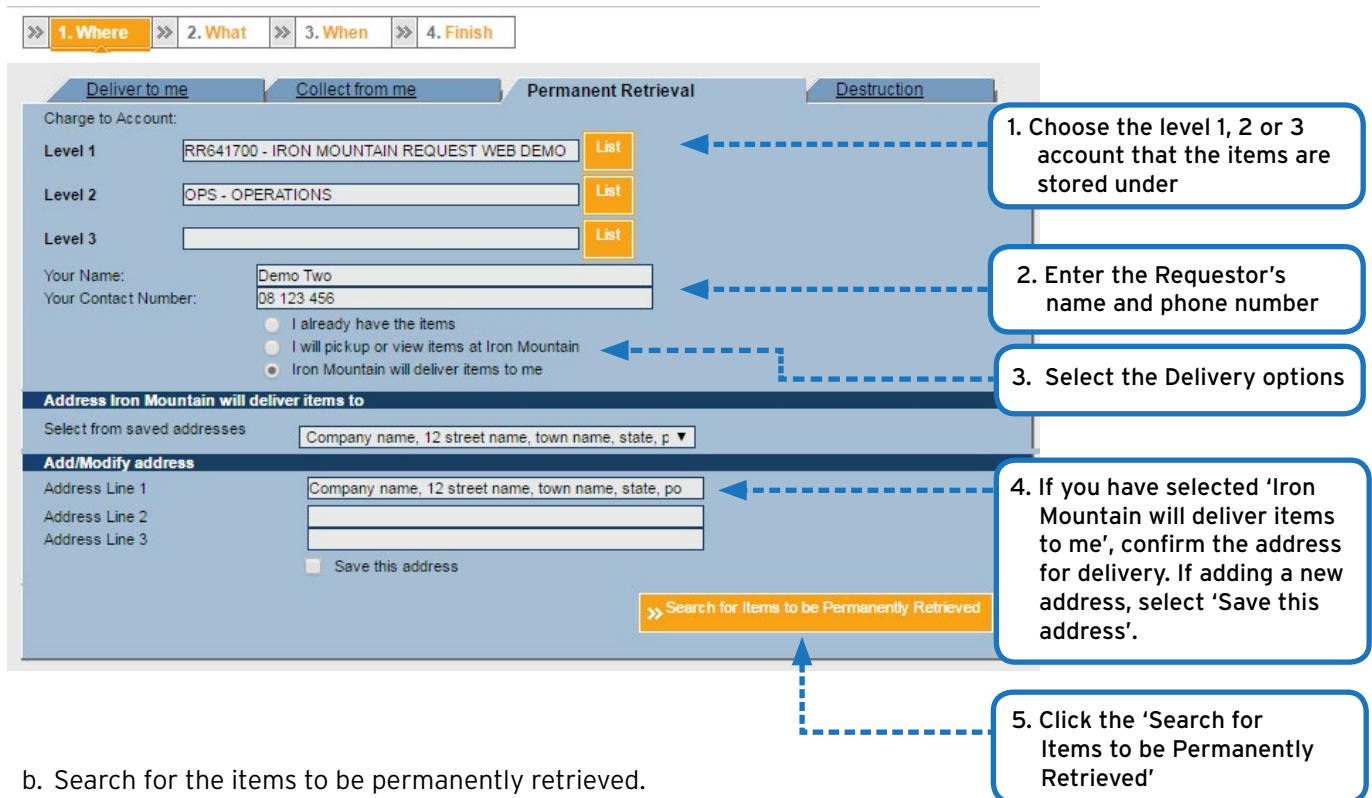
14. Click on 'Send Order To Iron Mountain'



## 2.7 Permanent Retrievals

The Permanent Retrieval Work Order is for items that will not be returned to Iron Mountain.

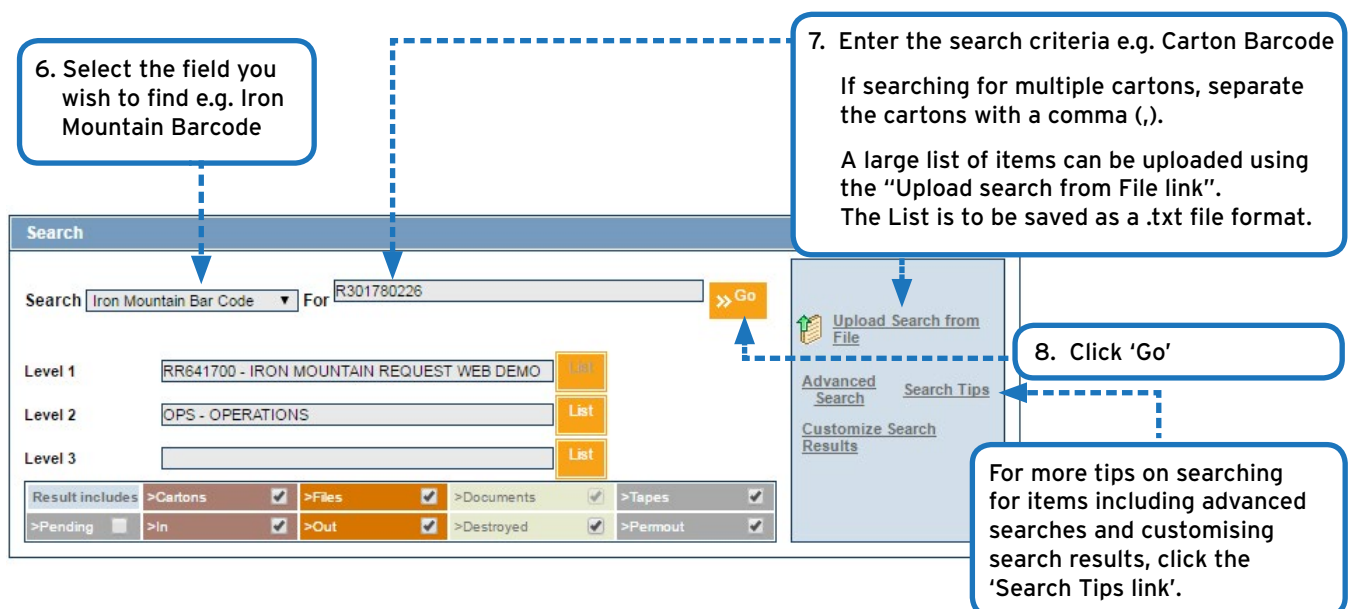
a. Click on the Permanent Retrieval Tab.



The screenshot shows the 'Permanent Retrieval' tab selected. The form includes sections for 'Charge to Account' (Level 1, 2, 3), 'Your Name' and 'Your Contact Number', delivery options, and an address section. Numbered callouts are as follows:

1. Choose the level 1, 2 or 3 account that the items are stored under
2. Enter the Requestor's name and phone number
3. Select the Delivery options
4. If you have selected 'Iron Mountain will deliver items to me', confirm the address for delivery. If adding a new address, select 'Save this address'.
5. Click the 'Search for Items to be Permanently Retrieved'

b. Search for the items to be permanently retrieved.



The screenshot shows the 'Search' form. Numbered callouts are as follows:

6. Select the field you wish to find e.g. Iron Mountain Barcode
7. Enter the search criteria e.g. Carton Barcode  
If searching for multiple cartons, separate the cartons with a comma (.).  
A large list of items can be uploaded using the "Upload search from File link".  
The List is to be saved as a .txt file format.
8. Click 'Go'




Additional callouts include:


- For more tips on searching for items including advanced searches and customising search results, click the 'Search Tips link'.

# RECORDS MANAGEMENT PORTAL USER GUIDE

9. Tick the item(s) you would like to add to your order

Search Results 1 search results found [Download Full Search Results](#)

Perm Out (All)	History	Status	Account	Iron Mountain Bar Code	Alternate Code	Short Description	Details	Image on ReQuest
<input checked="" type="checkbox"/>	 R	 In	RR641700 / OPS	R301780226				

[Order Supplies](#) [Request Unregistered Items](#) [Add Selected Items to Cart](#) 0 Items  [Check Out](#)




10. Click the 'Add Selected Items to Cart'

If you are having difficulty with adding an item to your Cart, check the status column of the item. For permanent retrievals to be delivered to you - the item must be "In". If you have selected on the front 'Where' screen that you already have the items - then the status of the items must be 'out'.

11. If there are no further items to be added to order, click 'Check Out'

12. If you have selected that Iron Mountain will deliver the items to you, you can add 'Special Instructions' for the driver if required. 'Requested By', 'Cost Centre' and 'Work Order PO number' can also be added.

Shopping Cart Contents

Perm Out (All)	History	Status	Account	Iron Mountain Bar Code	Alternate Code	Short Description	Details
<input checked="" type="checkbox"/>	 R	 In	RR641700 / OPS	R301780226			

Comment:  Requested By:  Cost Center:  Apply to All

Additional Order Information

Work Order PO Number:

Special Instructions:  [Clear](#)

[Order Supplies](#) [Search For More Items](#) [Save Order For Later](#) [Cancel Order](#) [Send Order To Iron Mountain](#)

13. Click 'Send Order To Iron Mountain'

# RECORDS MANAGEMENT PORTAL USER GUIDE



There will be no option to choose a service priority for this order. In order for this Work Order to be completed, you must print or email your pre-work order details to the Service Delivery Team to confirm that you wish for this work order to be actioned by Iron Mountain.

Email addresses are as follows:

NSW - sdtnew@ironmountain.com

VIC - sdtvic@ironmountain.com

ACT - sdtact@ironmountain.com

SA - sdtisa@ironmountain.com

QLD - sdtqld@ironmountain.com

WA - sdtwa@ironmountain.com

NZ - sdtz@ironmountain.com

New OrderReview OrdersAdd/Manage InventoryReportsPreferences

>> 1. Where >> 2. What >> 3. When >> 4. Finish

[Print this confirmation](#)  
 [Email me this confirmation](#)

Request Service Order Confirmation

Your reference work order number is: 04231350, Successfully Processed

Service:Scheduled

Order Local Time:2:05 PM Thursday, April 13, 2017

Will be completed by:Not applicable, waiting customer confirmation

Order requested by:Demo Two

08 123 456

Service Address:Company name, 12 street name, town name, state, po

Charge to:RR641700 / OPS

Work Order PO Number:

Return to Home Page

Order Items

History	Account	Iron Mountain Bar Code	Alternate Code	Short Description
	RR641700 / OPS	R301780226		

Comment: Requested By: Cost Center:

/24

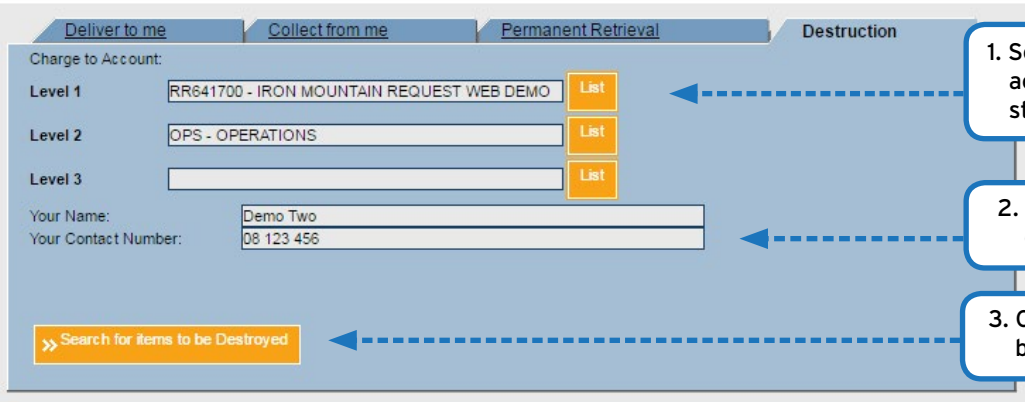


## 2.8 Destruction Request

A destruction order is a request to destroy cartons that are currently stored with Iron Mountain.

a. Click on the 'Destruction' Tab.

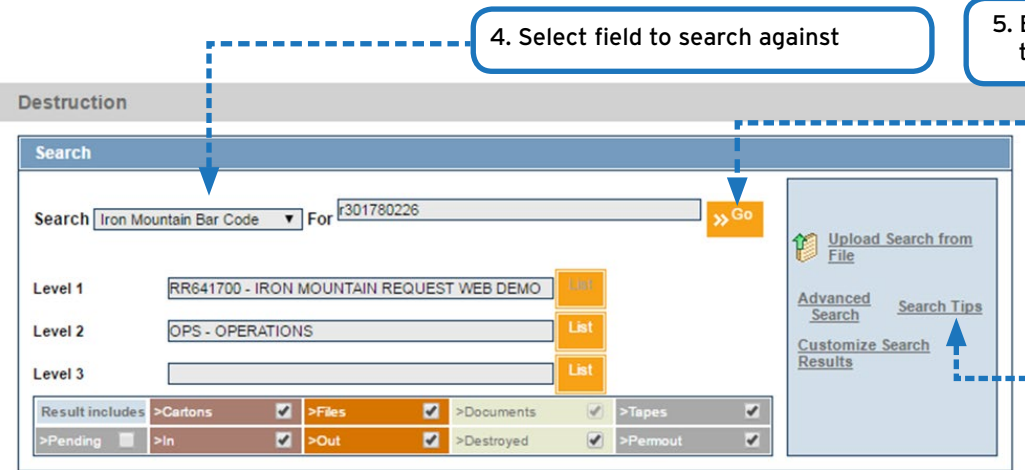
» 1. Where
» 2. What
» 3. When
» 4. Finish



1. Select your Level 1, 2 or 3 account that the items are stored under

2. Confirm the Requestor's contact details

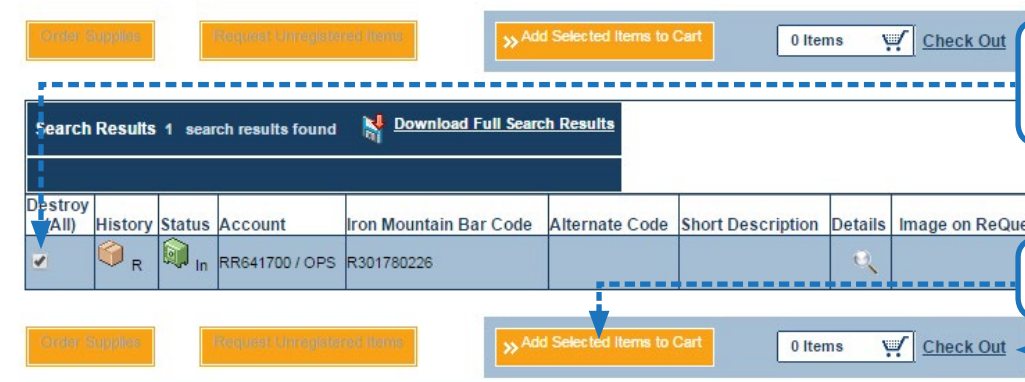
3. Click 'Search for Items to be Destroyed'



4. Select field to search against

5. Enter the 'Search Criteria', then select 'Go'

For more tips on searching for items including advanced searches and to customise your search results, click the 'Search Tips link'.



6. Click the check box next to the items you wish to destroy

7. Click 'Add Selected Items to Cart'




8. Click 'Check Out' when finished adding your items

9. This order requires confirmation from the destruction contact on your account in order to proceed with this request. Therefore no service priority can be selected.

10. Click 'Save Order For Later' if you wish to add more items or submit at a later time

**Destruction - Checkout**

[Order Supplies](#) [Search For More Items](#) [Save Order For Later](#) [Cancel Order](#) [» Send Order To Iron Mountain](#)

Shopping Cart Contents							
Destroyed (All)	History	Status	Account	Iron Mountain Bar Code	Alternate Code	Short Description	Details
<input checked="" type="checkbox"/>		 In	RR641700 / OPS	R301780226			

Comment:  Requested By:  Cost Center:  Apply to All

11. Review the items in your cart and you can also add or delete items as requested using the tick boxes on the left of the items.

12. If required, add details to each item of the requestor at your organisation, Cost Centre or Purchase Order numbers to assist with future reconciliation.

13. Click 'Send Order To Iron Mountain' when you are ready to lodge the destruction

# RECORDS MANAGEMENT PORTAL USER GUIDE



Once you have selected the 'Send Order To Iron Mountain' button, the Service Order Confirmation will appear. In order for Iron Mountain to proceed with the request to destroy these items, print or email this confirmation to the destruction contact on the account. They will need to sign and email this request to the Service Delivery Team at Iron Mountain to action (dms.destruction@ironmountain.com).

Once the step above is completed, the request will be finalised and until then you will still be charged retention on these cartons. The Service Delivery Team at Iron Mountain will advise you that your order has been converted and the items will be processed for destruction.

>> 1. Where >> 2. What >> 3. When >> 4. Finish

[Print this confirmation](#)  
 [Email me this confirmation](#)

Request Service Order Confirmation

Your reference work order number is: 04508065, Successfully Processed  
Service: Scheduled  
Order Local Time: 2:47 PM Friday, 5 October 2018  
Will be completed by: ~~Not applicable~~, waiting customer confirmation

Order requested by: Bernice McLeod  
Service Address:  
Charge to: RR641700 / OPS  
Work Order PO Number:

Return to Home Page

Order Items

History	Account	Iron Mountain Bar Code	Alternate Code	Short Description
	RR641700 / OPS	R301780226		

Comment: Requested By: Cost Center:

Special Instructions

Your request is pending your final confirmation. You must print, sign and fax this Work Order to your CARE representative to complete this Work Order.

Name

Signature

Return to Home Page

## 3.0 SEARCH TIPS

The Search tips link provides information on:

- Tips for searching for items
- Uploading searches from a file
- Advanced searches
- Customising search results

1. Select the 'What' tab.

» 1. Where » **2. What** » 3. When » 4. Finish

Delivery - Iron Mountain will drop off to customer

Search

Search

Alternate Code

▼

For

>> Go

Level 1

RR641700 - IRON MOUNTAIN REQUEST WEB DEMO

List

Level 2

OPS - OPERATIONS

List

Level 3

List

Result includes

>Cartons

☒

>Files

☒

>Documents

☒

>Tapes

☒

>Pending

☐

>In

☒

>Out

☒

>Destroyed

☒

>Permout

☒

Upload Search from File

Advanced Search

Search Tips

Customize Search Results

2. Click the 'Search Tips' and refer to the instructions

### Search Tips

#### Tips for searching with ReQuest Web

ReQuest Web offers four options for searching for inventory items:

Search

Search

Alternate Code

▼

For

>> Go

Level 1

List

Level 2

List

Level 3

List

Result includes

>Cartons

☒

>Files

☒

>Documents

☒

>Tapes

☒

>Pending

☐

>In

☐

>Out

☒

>Destroyed

☒

>Permout

☒

Upload Search from File

Advanced Search

Search Tips

Customize Search Results

1. Simple Search offers the most commonly used search fields and a single criteria field. This is the default search option. All other search options can be accessed by selecting the links displayed on the right side of the screen shot above.
2. Upload Search from File provides users the option to upload a file of search criteria (rather than typing large numbers of items)
3. Advanced Search allows users to create complex search queries – and save these for later re-use.
4. Customize Search Results allows users to customize the display of their search results.

A key rule for searching on ReQuest Web is to use clear and detailed search criteria. This practice will allow the search process to complete faster. ReQuest Web will abort a search that is too broad. Once the number of matches to a set of search criteria exceeds 1,250 records (50 result pages that contain 25 search results each), the search will be terminated.

#### Simple Search

Search

Search

Alternate Code

▼

## 4.0 UPDATING PREFERENCES

Your Work Order preferences can be customised once you have logged in.

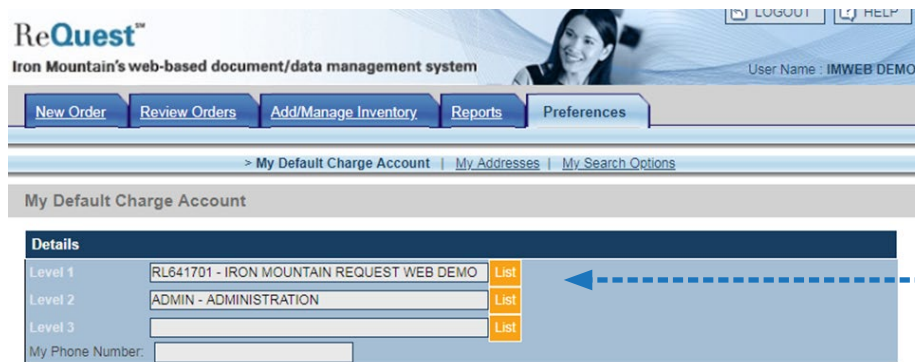
Start by logging in to your Iron Mountain Customer Portal account and click on the Work Order link to load the Work Order interface.

The **Preferences** tab allows you to:

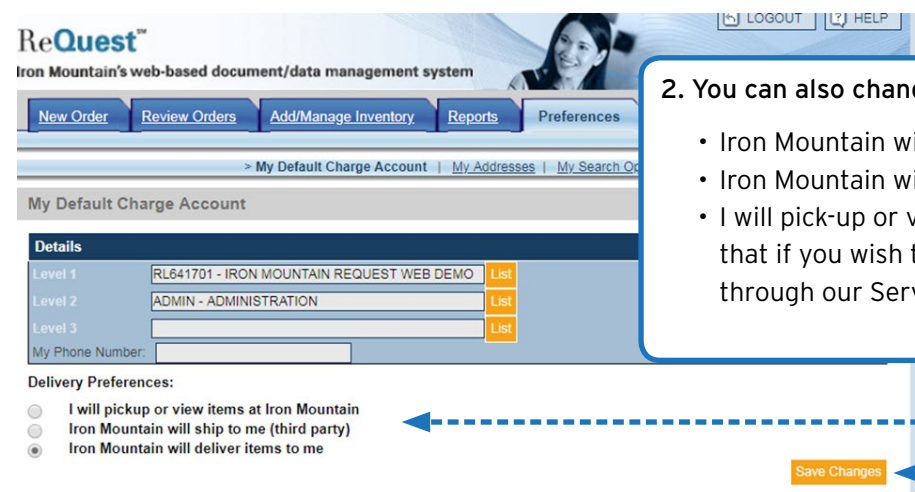
- Change your default charge account
- Set default delivery options
- Add and amend default addresses
- Configure search options.



### 4.1 My Default Charge Account



1. Click on the 'List' buttons to select the Level 1 and Level 2 or 3 Accounts. Once this change has been saved this account will be the default account that will appear on all Work Orders raised (unless manually updated when creating a Work Order).



2. You can also change your delivery preferences to default to:

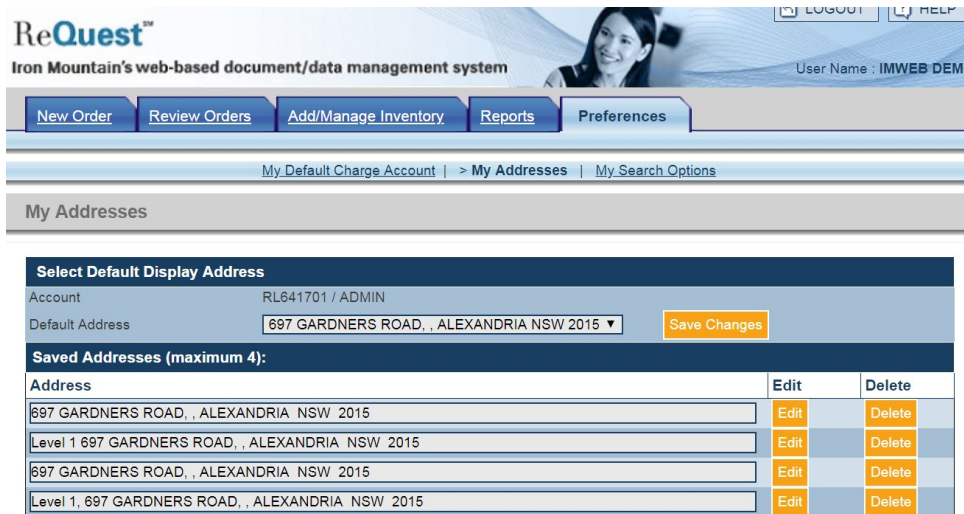
- Iron Mountain will deliver items to me
- Iron Mountain will ship to me (third party) or
- I will pick-up or view items at Iron Mountain - please note that if you wish to view items this must be requested through our Service Delivery Team.

3. Click "Save Changes" to apply the preferences.



## 4.2 My Addresses

Using the 'My Address' link, you can update your default address. You can also add, edit and save new addresses for selection when raising orders.



**ReQuest™**  
Iron Mountain's web-based document/data management system

User Name : IMWEB DEMO

[New Order](#) [Review Orders](#) [Add/Manage Inventory](#) [Reports](#) [Preferences](#)

[My Default Charge Account](#) | [My Addresses](#) | [My Search Options](#)

**My Addresses**

**Select Default Display Address**

Account: RL641701 / ADMIN

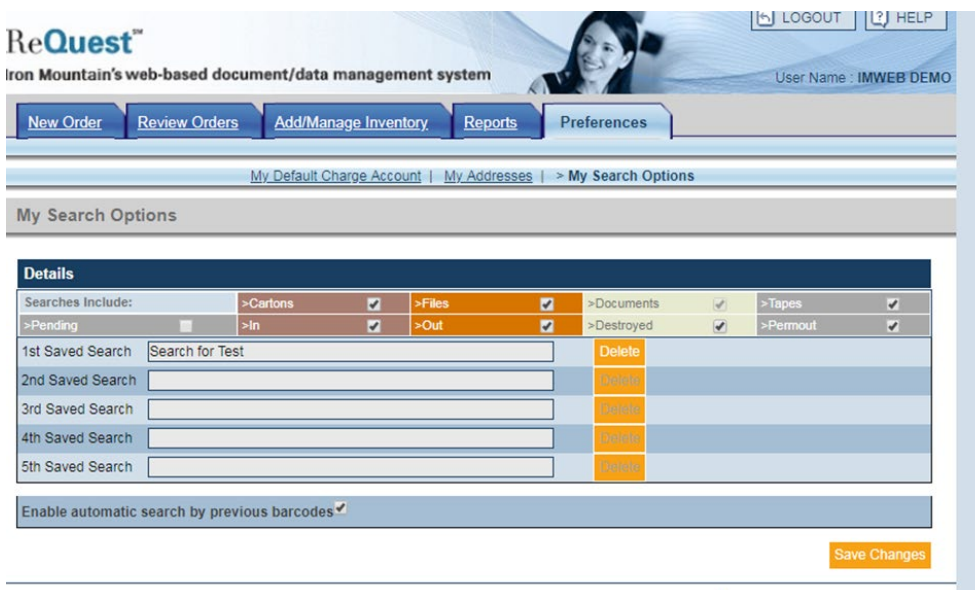
Default Address:  [Save Changes](#)

**Saved Addresses (maximum 4):**

Address	Edit	Delete
697 GARDNERS ROAD, , ALEXANDRIA NSW 2015	<a href="#">Edit</a>	<a href="#">Delete</a>
Level 1 697 GARDNERS ROAD, , ALEXANDRIA NSW 2015	<a href="#">Edit</a>	<a href="#">Delete</a>
697 GARDNERS ROAD, , ALEXANDRIA NSW 2015	<a href="#">Edit</a>	<a href="#">Delete</a>
Level 1, 697 GARDNERS ROAD, , ALEXANDRIA NSW 2015	<a href="#">Edit</a>	<a href="#">Delete</a>

## 4.3 My Search Options

Here you can create and save common search options for your account. For example, you can save a search for cartons that are 'In' or files that are 'Out'.



**ReQuest™**  
Iron Mountain's web-based document/data management system

User Name : IMWEB DEMO

[New Order](#) [Review Orders](#) [Add/Manage Inventory](#) [Reports](#) [Preferences](#)

[My Default Charge Account](#) | [My Addresses](#) | [My Search Options](#)

**My Search Options**

**Details**

Searches Include:	>Cartons	>Files	>Documents	>Tapes
>Pending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
>In	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
>Out	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
>Destroyed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
>Permout	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

1st Saved Search:  [Delete](#)

2nd Saved Search:  [Delete](#)

3rd Saved Search:  [Delete](#)

4th Saved Search:  [Delete](#)

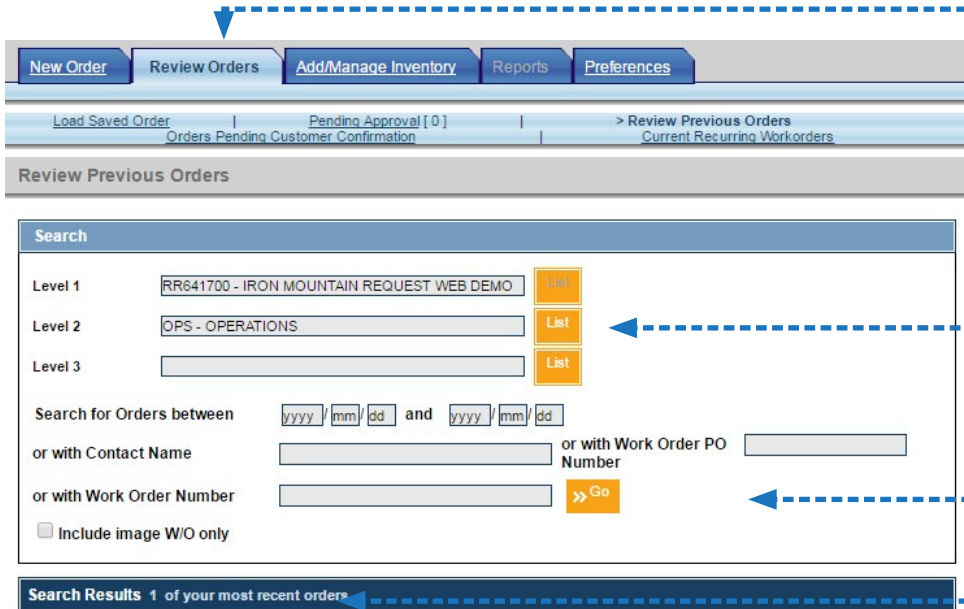
5th Saved Search:  [Delete](#)

Enable automatic search by previous barcodes ☒

[Save Changes](#)

## 5.0 REVIEW ORDERS

Select the account you wish to review on the front New Order tab screen.



1. Select the 'Review Orders' tab.

2. Here you can amend the level 2 account by using the 'List' button.

Note: You will have to return to the 'New Order' screen to modify the Level 1 Account Number.

3. Using the search data field, enter in the applicable criteria for your search e.g. the period when the order was placed or the Work Order number.

4. Search results will be shown below

- ▶ **Load Saved Order:** Work Orders created and saved to be completed at a later time
- ▶ **Pending Approval:** Work Orders placed by a user that requires higher approval before the order is placed
- ▶ **Review Previous Orders:** Work Order history
- ▶ **Orders Pending Customer Confirmation:** Orders requiring sign off e.g. destruction
- ▶ **Current Recurring Work Orders:** Work Orders that are setup on a regular schedule

Please note that if any of these fields are greyed out, you don't have access to view, approve or make changes on them. If you require your access to be amended, complete the Online Access Form located on our website [www.ironmtn.com.au](http://www.ironmtn.com.au) (AU) or [www.ironmountain.co.nz](http://www.ironmountain.co.nz) (NZ) and send the completed form through to our Service Delivery Team.

## 6.0 MANAGE INVENTORY

The 'Edit Inventory' tab under the 'Add / Manage Inventory' tab will be available to users with an access level of 2, 4, 5 or 6.

If you would like to customise your account to perform any of the functions below, please speak with your Customer Account Support Specialist.

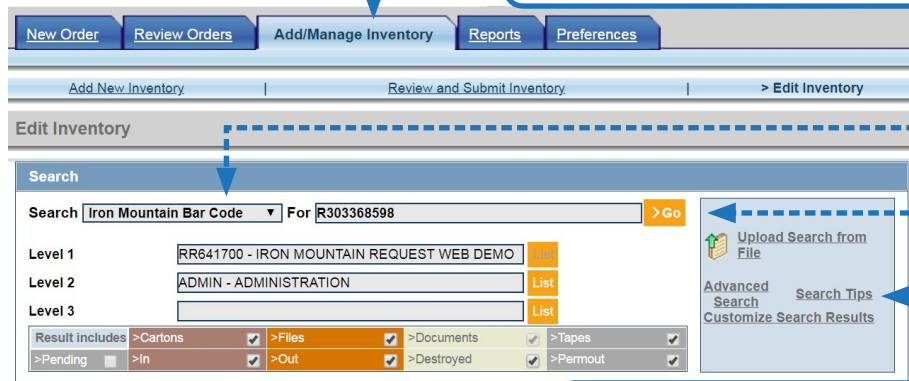
- Re-label fields to a terminology that is more relevant to your organisation
- Make certain fields mandatory to complete
- Remove fields that are not used by your organisation

**1. Click on 'Add/Manage Inventory' tab and select Edit Inventory**

**2. Choose fields to search for items. If you wish to search for multiple items, enter the barcodes separating them with a comma (,). A large list of items can be uploaded using the 'Upload Search from File' link. The List is to be saved using a .txt file format.**

**3. Enter the search criteria and click 'Go'**

For more tips on searching for items including advanced searches and customising search results, click the 'Search Tips link'.

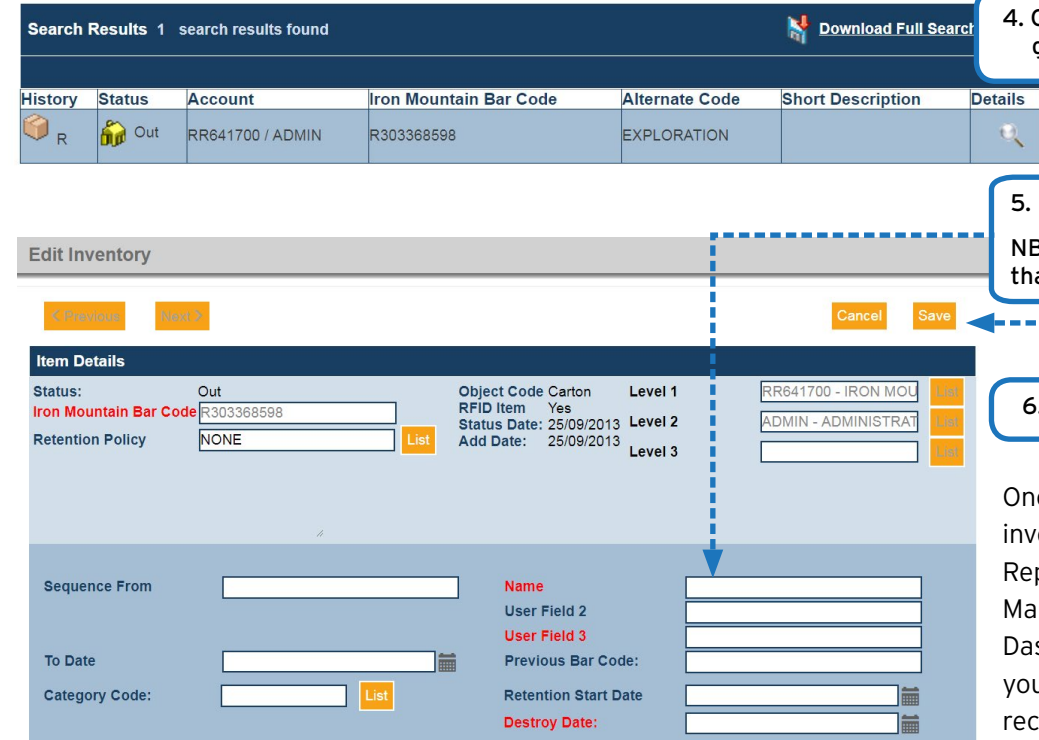


**4. Click on the magnifying glass to edit the item**

**5. Update details as required**  
NB: The red fields indicated fields that are mandatory.

**6. Click 'Save' to apply changes**

Once you have updated your inventory, a Compliance Inventory Report can be run via the Records Management Portal Reports Dashboard. This report will help you to monitor your accounts for reconciliation.





## 7.0 ADD ONLINE

The Add Online feature is designed to streamline your Records Management even further by enabling you to store and track information in a way that is meaningful to you.

Add Online allows you to record relevant details about your items before they are lodged at our Iron Mountain facility.

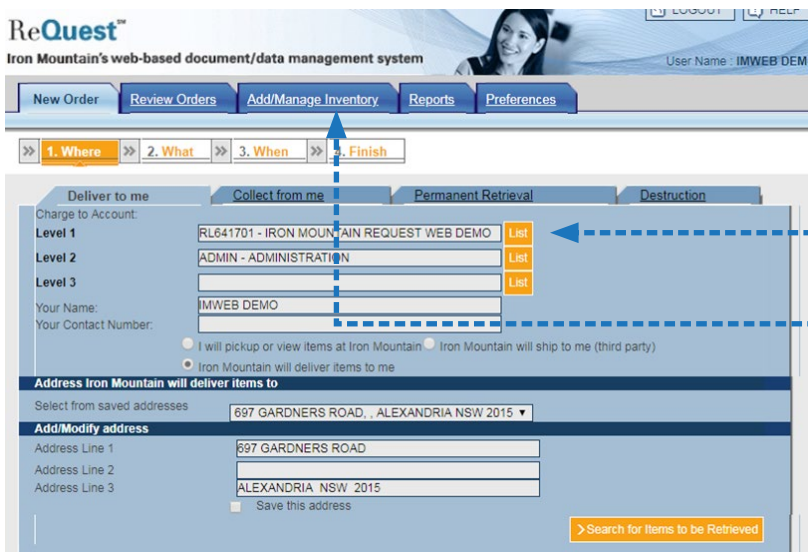
Add Online not only allows you to register your carton prior to it being collected for the first time but you can also add information against that carton to make it easier to locate and categorise. This information can be anything from dates to addresses, destroy dates to descriptions.

Charges may apply for using this service. Please discuss any questions with your Customer Account Support Specialist.

To have Add Online set up on your account, complete the Add Online set up form that is located on [www.ironmtn.com.au](http://www.ironmtn.com.au) (AU) or [www.ironmountain.co.nz](http://www.ironmountain.co.nz) (NZ) support page.

The first page of the form relates to your file information and the second page relates to your carton information. Fields on the form can be relabelled to a name that is more suitable to your organisation.

### 7.1 How to add a pending carton

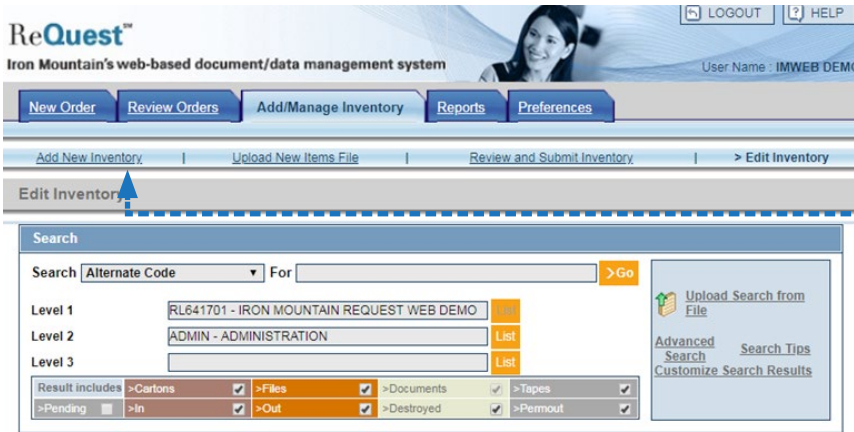


1. Select the Level 1 and Level 2 or 3 Accounts that you wish to add a carton to.

2. Once the account has been selected, go to the 'Add/Manage Inventory' tab.

The system will take you to the "Edit Inventory Screen".

# RECORDS MANAGEMENT PORTAL USER GUIDE



ReQuest™  
Iron Mountain's web-based document/data management system

LOGOUT HELP  
User Name : IMWEB DEMO

New Order Review Orders Add/Manage Inventory Reports Preferences

Add New Inventory Upload New Items File Review and Submit Inventory Edit Inventory

Edit Inventory

Search

Search Alternate Code For >Go

Level 1 RL641701 - IRON MOUNTAIN REQUEST WEB DEMO List

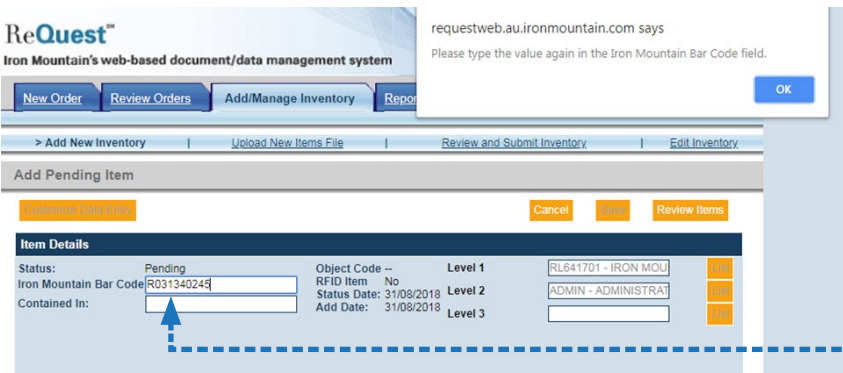
Level 2 ADMIN - ADMINISTRATION List

Level 3 List

Result includes >Cartons >Files >Documents >Tapes >Pending >In >Out >Destroyed >Permut

Upload Search from File  
Advanced Search Search Tips Customize Search Results

3. Click the Add New Inventory field to access the Add Online functionality



ReQuest™  
Iron Mountain's web-based document/data management system

requestweb.au.ironmountain.com says  
Please type the value again in the Iron Mountain Bar Code field.

OK

> Add New Inventory Upload New Items File Review and Submit Inventory Edit Inventory

Add Pending Item

Customize Data Entry Cancel Save Review Items

Item Details

Status: Pending Object Code -- Level 1 RL641701 - IRON MOU List

Iron Mountain Bar Code R031340245 RFID Item No Level 2 ADMIN - ADMINISTRATION List

Contained In: Add Date: 31/08/2018 Level 3 List

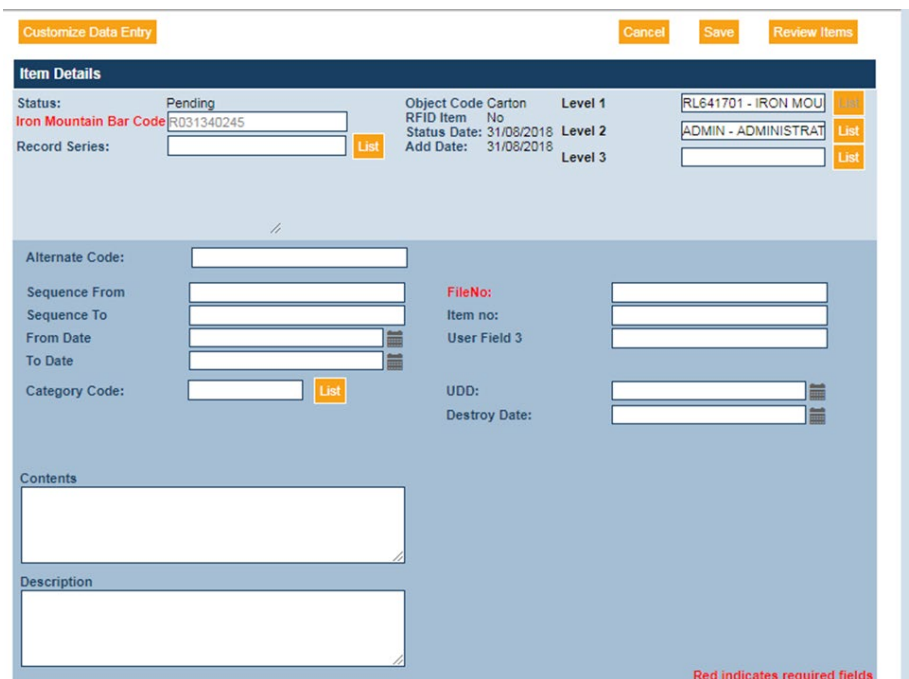
4. Enter a 10 digit Iron Mountain carton barcode number.

A message will appear to ask you to enter this barcode in again.

This double entry helps to ensure data accuracy.

If you are entering an RFID barcode, ensure that you keep the "R" in front of the barcode.

The screen below will appear with fields to be completed. Enter the fields required and select 'Save' to finalise your entry. Any mandatory fields will be in red. Some fields may also require double data entry.



Customize Data Entry Cancel Save Review Items

Item Details

Status: Pending Object Code Carton Level 1 RL641701 - IRON MOU List

Iron Mountain Bar Code R031340245 RFID Item No Level 2 ADMIN - ADMINISTRATION List

Record Series: Add Date: 31/08/2018 Level 3 List

Alternate Code: Sequence From Sequence To From Date To Date Category Code: List

FileNo: Item no: User Field 3

UDD: Destroy Date:

Contents

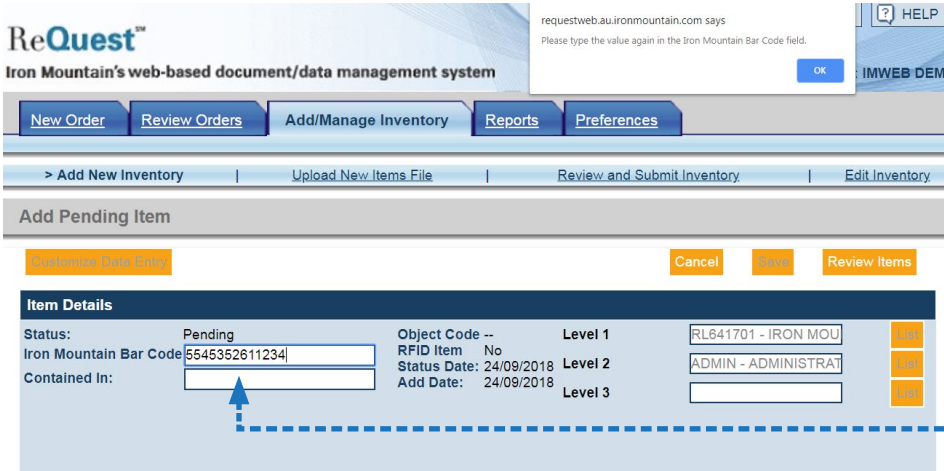
Description

Red indicates required fields

# RECORDS MANAGEMENT PORTAL USER GUIDE

## 7.2 How to add a file

Follow Step 1 to Step 3 under section 7.1 (How to add a pending carton) to identify the accounts that you wish to add a file and select the 'Add/Manage Inventory' tab.



requestweb.au.ironmountain.com says  
Please type the value again in the Iron Mountain Bar Code field.

OK IMWEB DEMO

New Order Review Orders Add/Manage Inventory Reports Preferences

> Add New Inventory | Upload New Items File | Review and Submit Inventory | Edit Inventory

Add Pending Item

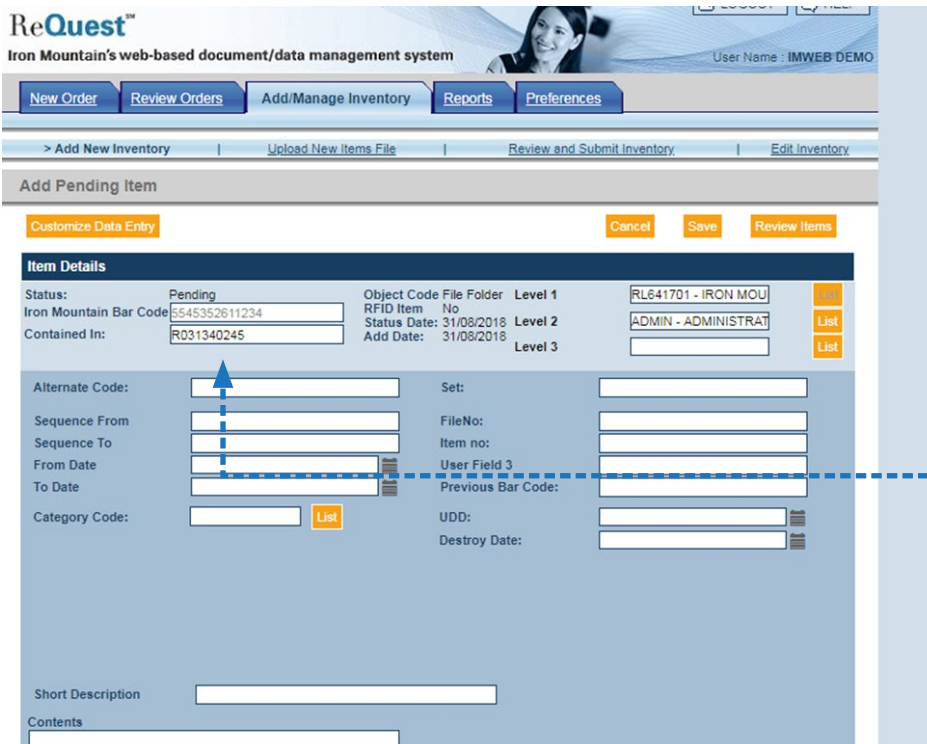
Customize Data Entry Cancel Save Review Items

Item Details

Status: Pending Object Code -- Level 1 RL641701 - IRON MOU  
Iron Mountain Bar Code 5545352611234 RFID Item No Status Date: 24/09/2018 Level 2 ADMIN - ADMINISTRAT  
Contained In: Add Date: 24/09/2018 Level 3

1. Enter a 13 digit Iron Mountain file barcode number. When entering in a file barcode, disregard the "F" in the front of the barcode number.

A message will appear to ask you to enter this barcode again.



ReQuest™  
Iron Mountain's web-based document/data management system

User Name: IMWEB DEMO

New Order Review Orders Add/Manage Inventory Reports Preferences

> Add New Inventory | Upload New Items File | Review and Submit Inventory | Edit Inventory

Add Pending Item

Customize Data Entry Cancel Save Review Items

Item Details

Status: Pending Object Code File Folder Level 1 RL641701 - IRON MOU  
Iron Mountain Bar Code 5545352611234 RFID Item No Status Date: 31/08/2018 Level 2 ADMIN - ADMINISTRAT  
Contained In: R031340245 Add Date: 31/08/2018 Level 3

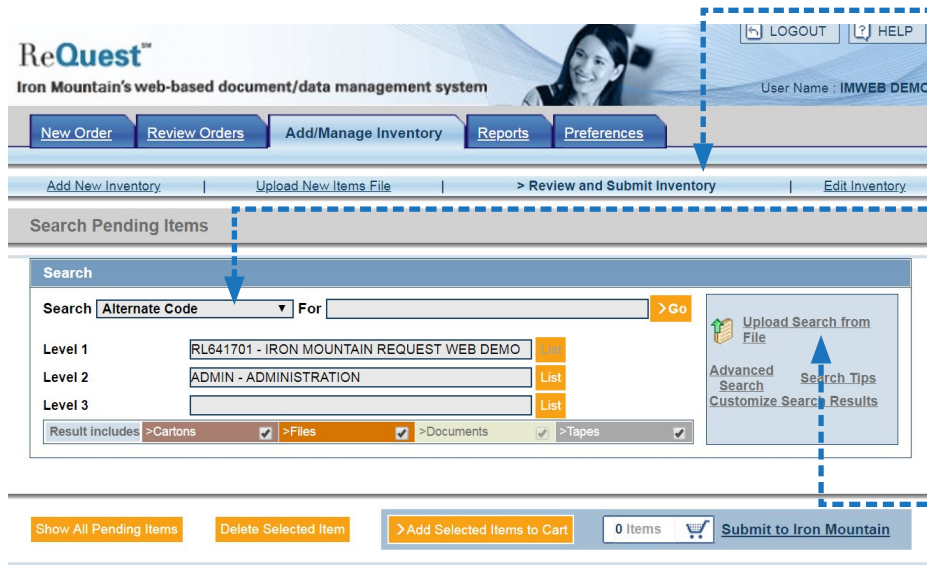
Alternate Code: Set:  
Sequence From: FileNo:  
Sequence To: Item no:  
From Date: User Field 3:  
To Date: Previous Bar Code:  
Category Code: UDD:  
Destroy Date:

Short Description  
Contents

2. Enter the barcode of the carton that the file is stored in. This double entry helps to ensure data accuracy. If you are entering an RFID barcode, ensure that the "R" remains in front of the barcode.

Complete the required fields and select 'Save' to finalise your entry.

## 7.3 How to add a pending item to a Work Order for collection



ReQuest™  
Iron Mountain's web-based document/data management system

User Name: IMWEB DEMO

LOGOUT HELP

New Order Review Orders Add/Manage Inventory Reports Preferences

Add New Inventory Upload New Items File > Review and Submit Inventory Edit Inventory

Search Pending Items

Search

Search Alternate Code For >Go

Level 1 RL641701 - IRON MOUNTAIN REQUEST WEB DEMO List

Level 2 ADMIN - ADMINISTRATION List

Level 3

Result includes >Cartons >Files >Documents >Tapes

Upload Search from File

Advanced Search Search Tips Customize Search Results

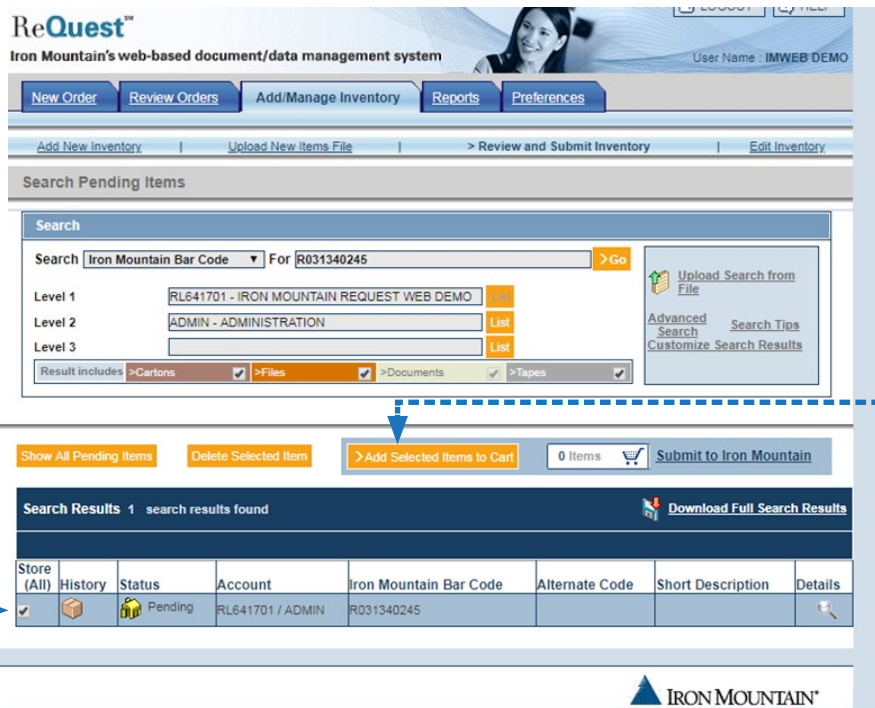
Show All Pending Items Delete Selected Item >Add Selected Items to Cart 0 Items Submit to Iron Mountain

1. Click on the 'Review and Submit Inventory' option under the "Add / Manage Inventory" tab.

2. Select the Iron Mountain barcode from the drop down menu, or any other field of information you would like to search. Select "Go" after putting in search criteria. If searching for multiple cartons, separate the cartons with a 'comma'.

3. The "Upload Search from File" link can be used if a large list of items is to be uploaded. Ensure the file is saved in a .txt file format.

4. When the search results appear, tick the items that need to be collected and stored at the Iron Mountain Facility. Select Add Selected Items to Cart to add to your order.



ReQuest™  
Iron Mountain's web-based document/data management system

User Name: IMWEB DEMO

LOGOUT HELP

New Order Review Orders Add/Manage Inventory Reports Preferences

Add New Inventory Upload New Items File > Review and Submit Inventory Edit Inventory

Search Pending Items

Search

Search Iron Mountain Bar Code For R031340245 >Go

Level 1 RL641701 - IRON MOUNTAIN REQUEST WEB DEMO List

Level 2 ADMIN - ADMINISTRATION List

Level 3

Result includes >Cartons >Files >Documents >Tapes

Upload Search from File

Advanced Search Search Tips Customize Search Results

Show All Pending Items Delete Selected Item >Add Selected Items to Cart 0 Items Submit to Iron Mountain

Search Results 1 search results found Download Full Search Results

Store (All)	History	Status	Account	Iron Mountain Bar Code	Alternate Code	Short Description	Details
<input checked="" type="checkbox"/>			Pending	RL641701 / ADMIN	R031340245		

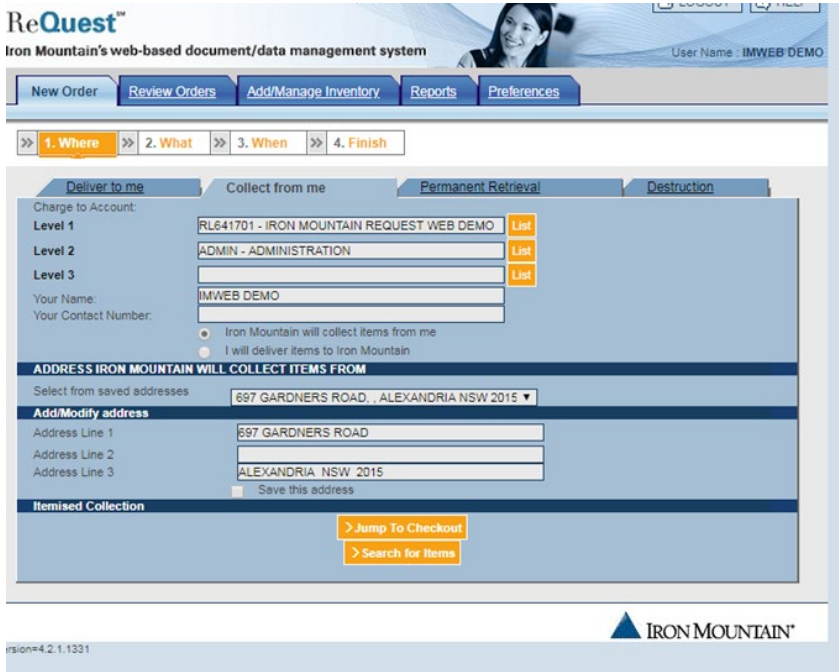
IRON MOUNTAIN®

5. Select the "Add Selected Items to Cart" to add to your order.

# RECORDS MANAGEMENT PORTAL USER GUIDE

You will now be directed to the “Collect from me” screen to enter your address details. This process will now follow the standard collection Work Order process for submitting items.

Fill out or amend any collection details and select “Jump to Checkout”.



ReQuest™  
Iron Mountain's web-based document/data management system

User Name: IMWEB DEMO

New Order Review Orders Add/Manage Inventory Reports Preferences

1. Where 2. What 3. When 4. Finish

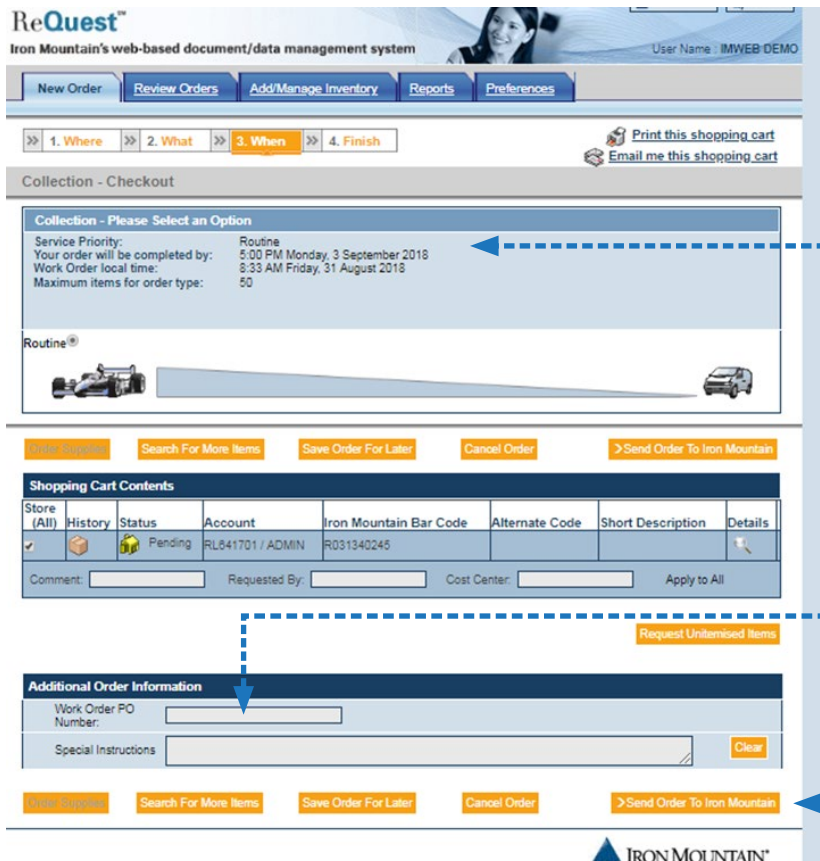
Deliver to me Collect from me Permanent Retrieval Destruction

Charge to Account:  
Level 1 RL641701 - IRON MOUNTAIN REQUEST WEB DEMO List  
Level 2 ADMIN - ADMINISTRATION List  
Level 3 IMWEB DEMO List  
Your Name: IMWEB DEMO  
Your Contact Number:  
☐ Iron Mountain will collect items from me  
☐ I will deliver items to Iron Mountain

ADDRESS IRON MOUNTAIN WILL COLLECT ITEMS FROM  
Select from saved addresses 697 GARDNERS ROAD, ALEXANDRIA NSW 2015  
Add/Modify address  
Address Line 1 697 GARDNERS ROAD  
Address Line 2 ALEXANDRIA NSW 2015  
Address Line 3  
☐ Save this address

Itemised Collection  
> Jump To Checkout  
> Search for Items

IRON MOUNTAIN



ReQuest™  
Iron Mountain's web-based document/data management system

User Name: IMWEB DEMO

New Order Review Orders Add/Manage Inventory Reports Preferences

1. Where 2. What 3. When 4. Finish

Print this shopping cart  
Email me this shopping cart

Collection - Checkout

Collection - Please Select an Option

Service Priority:	Routine
Your order will be completed by:	5:00 PM Monday, 3 September 2018
Work Order local time:	8:33 AM Friday, 31 August 2018
Maximum items for order type:	50

Routine®

Order Summary Search For More Items Save Order For Later Cancel Order > Send Order To Iron Mountain

Shopping Cart Contents

Store (All)	History	Status	Account	Iron Mountain Bar Code	Alternate Code	Short Description	Details
✓	📦	🟡 Pending	RL641701 / ADMIN	R031340245			

Comment: Requested By: Cost Center: Apply to All

Request Unitemised Items

Additional Order Information

Work Order PO Number: Special Instructions: Clear

Order Summary Search For More Items Save Order For Later Cancel Order > Send Order To Iron Mountain

IRON MOUNTAIN

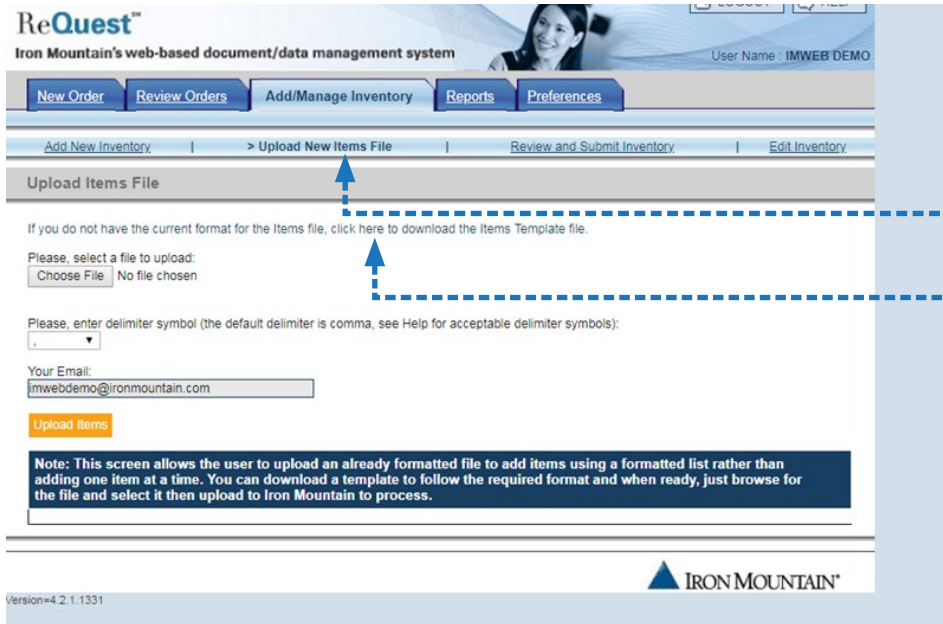
6. The Routine Service Priority will be the only option available for collection. This option is preselected.

7. If required, add the 'Requested By', 'Cost Centre', 'Purchase Order Number' or any 'Special Instructions' for the Driver

8. Select the 'Send Order to Iron Mountain' to finalise your order.



## 7.4 How to upload a list from an Excel spreadsheet



ReQuest™  
Iron Mountain's web-based document/data management system

User Name: IMWEB DEMO

New Order | Review Orders | **Add/Manage Inventory** | Reports | Preferences

Add New Inventory | **> Upload New Items File** | Review and Submit Inventory | Edit Inventory

Upload Items File

If you do not have the current format for the Items file, click here to download the Items Template file.

Please, select a file to upload:  
Choose File No file chosen

Please, enter delimiter symbol (the default delimiter is comma, see Help for acceptable delimiter symbols):  
.

Your Email:  
imwebdemo@ironmountain.com

Upload Items

**Note:** This screen allows the user to upload an already formatted file to add items using a formatted list rather than adding one item at a time. You can download a template to follow the required format and when ready, just browse for the file and select it then upload to Iron Mountain to process.

Version=4.2.1.1331

IRON MOUNTAIN®

1. Under the "Add/Manage Inventory" tab, click on "Upload New Items File".

If you do not have the current format for the items file, click here to download the item.

All relevant information needs to be completed in the Excel spreadsheet. Any fields not required should be left blank.

Upload the completed file by clicking on "Browse". Locate and select the file to be uploaded. Select "Upload Items".

## 8.0 REPORTS

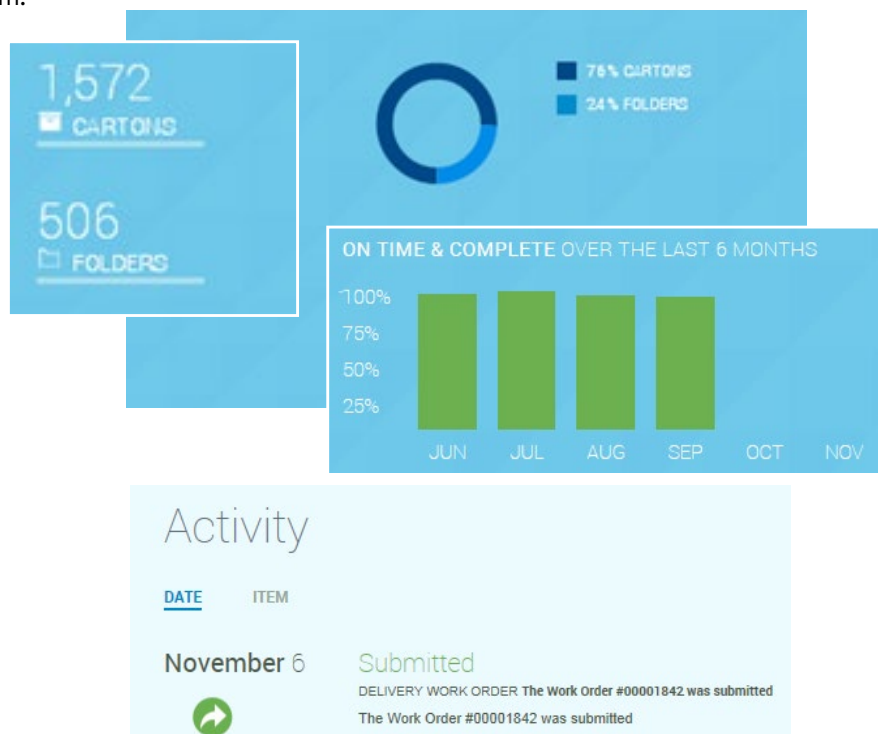
- Reports can be generated from the Dashboard on the landing page of the Records Management Portal.
- Reports available via the Portal are listed in the Records Management Portal brochure.

### 8.1 Interactive Dashboard (Home Page)

This is the first screen displayed upon login to the Portal. It provides a quick snapshot of your accounts at a glance. Users' security access levels determine which features and what content they can access and see. Not all features are available to all users. An authorised administrator within your organisation controls user access and the security access levels.

The main screen shows an interactive dashboard with the total number of cartons and folders in your inventory. Hovering over the cartons presents the total number of cartons at Iron Mountain, the total number of cartons at your locations, and the ratio of cartons to folders. The dashboard also includes On Time and Complete status of Work Orders over the last 6 months. Hovering over a particular month provides the number of orders completed on time versus the total orders placed that month.

Below the visual dashboard, recent account activities are highlighted. All data shown in the Records Management Portal is user-specific. It shows data from those Accounts which users have been granted access by their company's administrator. This Activity feed shows many different types of activities such as a Work Order creation, Work Order completion, destruction status etc. Activities can be downloaded by clicking on the link at the bottom.



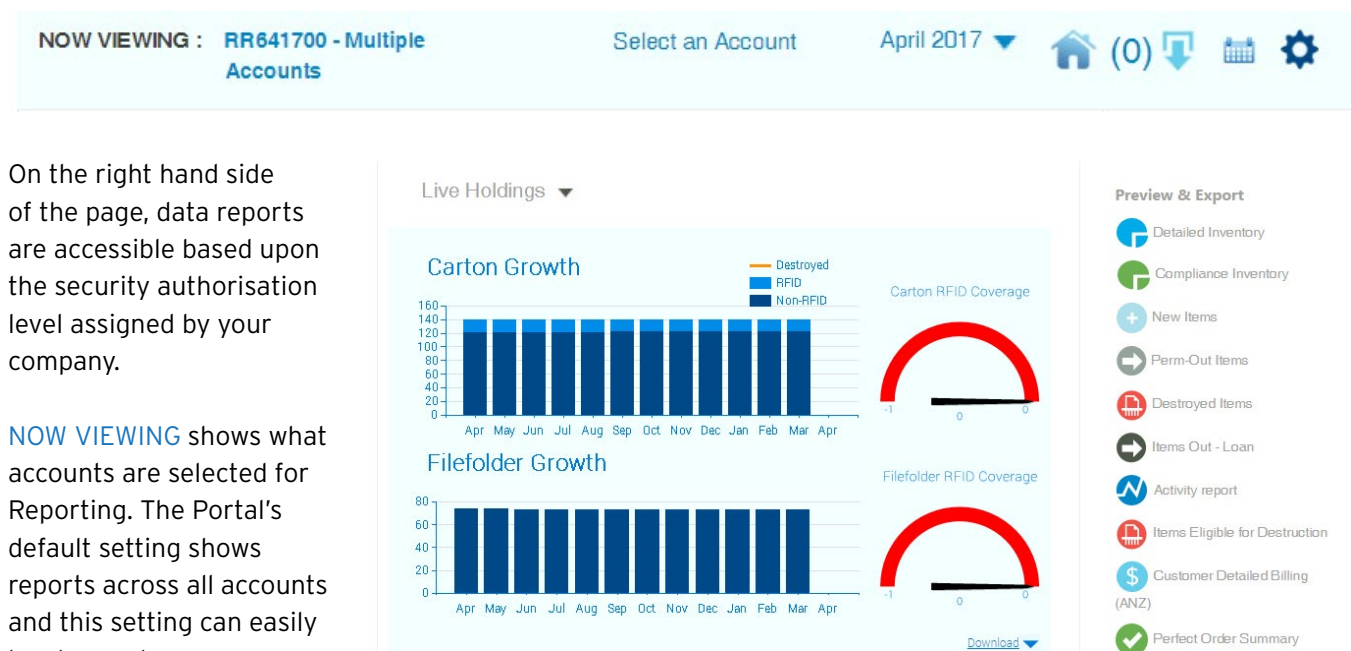
## 8.2 Enhanced Reporting

The Enhanced Reporting screen allows users to create, download and schedule reports. Users can also set their default preferences using the settings option. To access Enhanced Reporting, click on the “Reporting” tab.

## 8.3 Enhanced Reporting: Layout And Settings

At the top of this screen, user settings and navigation options are presented including account(s) currently selected, the option to change the account selection, select reporting month, download a report, schedule a report and reporting preferences.

The Visual Reports summarise holdings with Iron Mountain.



On the right hand side of the page, data reports are accessible based upon the security authorisation level assigned by your company.

**NOW VIEWING** shows what accounts are selected for Reporting. The Portal's default setting shows reports across all accounts and this setting can easily be changed.

**SELECT AN ACCOUNT** allows users to select an account or change default account for generating reports. Clicking on “Select an Account” presents a window with all allowed accounts and users can then select account(s) to generate reports. Clicking on “Apply” button will close the pop-up and refresh the Reporting Interface with data from the selected account.



The 'Month' drop down provides the option of selecting the timestamp of reporting. If there is a requirement to generate a report for a prior month, select that month from the drop down. Reports for past 24 months are maintained in the Portal.



Home: Clicking on home button resets the Reporting interface to default options



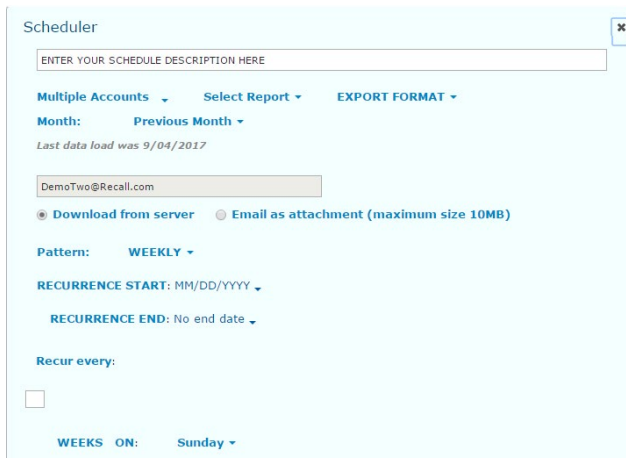
Indicates the number of reports currently scheduled for downloading



Download: Clicking on this link allows downloading of a report

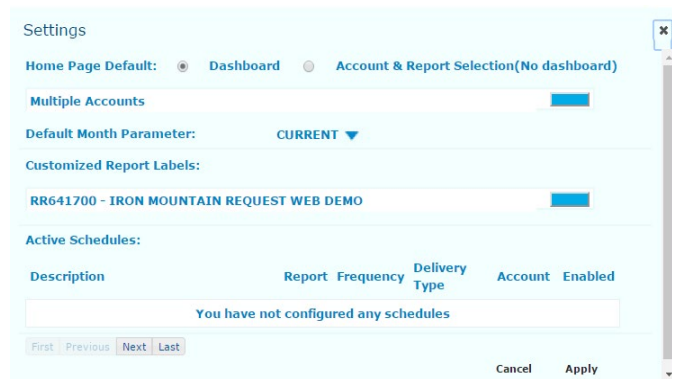


Schedule a Report: This feature allows reports to be scheduled based on frequency preferences.



The Scheduler pop-up window contains the following fields and controls:

- Header: Scheduler [Close]
- Input: ENTER YOUR SCHEDULE DESCRIPTION HERE
- Buttons: Multiple Accounts (dropdown), Select Report (dropdown), EXPORT FORMAT (dropdown)
- Month: Previous Month (dropdown)
- Text: Last data load was 9/04/2017
- Input: DemoTwo@Recall.com
- Radio buttons: Download from server (selected), Email as attachment (maximum size 10MB)
- Pattern: WEEKLY (dropdown)
- RECURRENT START: MM/DD/YYYY (dropdown)
- RECURRENT END: No end date (dropdown)
- Recur every: [ ]
- WEEKS ON: Sunday (dropdown)



The Settings pop-up window contains the following fields and controls:

- Header: Settings [Close]
- Home Page Default: Dashboard (selected), Account & Report Selection (No dashboard)
- Multiple Accounts: [ ]
- Default Month Parameter: CURRENT (dropdown)
- Customized Report Labels: RR641700 - IRON MOUNTAIN REQUEST WEB DEMO [ ]
- Active Schedules: [ ]
- Table headers: Description, Report, Frequency, Delivery Type, Account, Enabled
- Table body: You have not configured any schedules
- Navigation: First, Previous, Next, Last
- Buttons: Cancel, Apply

1. Click on the scheduler
2. In the pop up select Account, then select the desired report (e.g. "Detailed Inventory") and the Export Format
3. Then select the option for the data to be included from the current month or the previous month in the report
4. Reports can be scheduled to be downloaded to your computer or emailed as attachments
5. The frequency of the reports can be set as "Weekly" or "Monthly" by setting the Pattern drop down
6. The start and end dates for the reports can be selected as well
7. And finally a specific day of the week or month can be selected to generate the selected reports automatically
8. Clicking on "Save" schedules the automatic generation of report with selected settings

There is no limit to the amount of reports that can be scheduled.

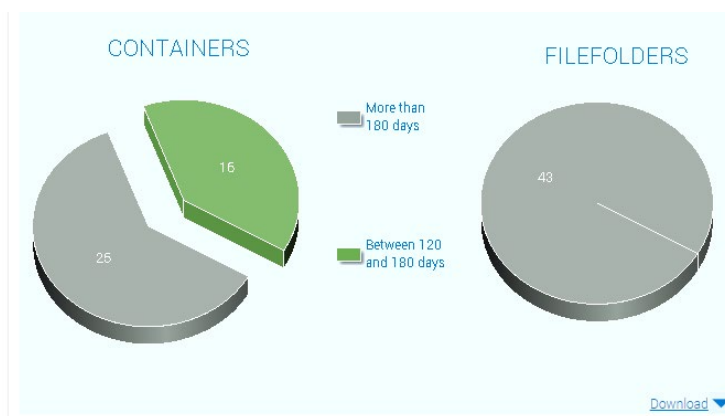


Settings allow users to select default choices for their reports and also access all their scheduled reports. Scheduled reports can be disabled at any time.

## 8.4 The Holding Summary

The initial visual reports available are Live Holdings and Items Out. As a default, the Portal presents the Live Holdings report. The data for Live Holdings report is refreshed every 48 hours. This report shows carton growth as well as the RFID coverage of cartons. Users with file folders or other items with Iron Mountain are shown growth data and RFID coverage for those items as well.

The Items Out report breaks out your holdings in “Out” status by cartons and file folders. It also provides information on how long these items have been in “Out” status. The visual reports can be downloaded by clicking on the link at the bottom.



## 8.5 Data Reports

In the Preview & Export section, there are shortcuts to the most common reports. Previously, access to some of these reports required engagement with Iron Mountain Service Delivery or Account Management team. Now these reports can be immediately generated online.


The report content can be previewed and then downloaded in Microsoft Excel or CSV (comma separated) formats. All reports are generated for the selected account and month in the settings at the top of the reporting screen.

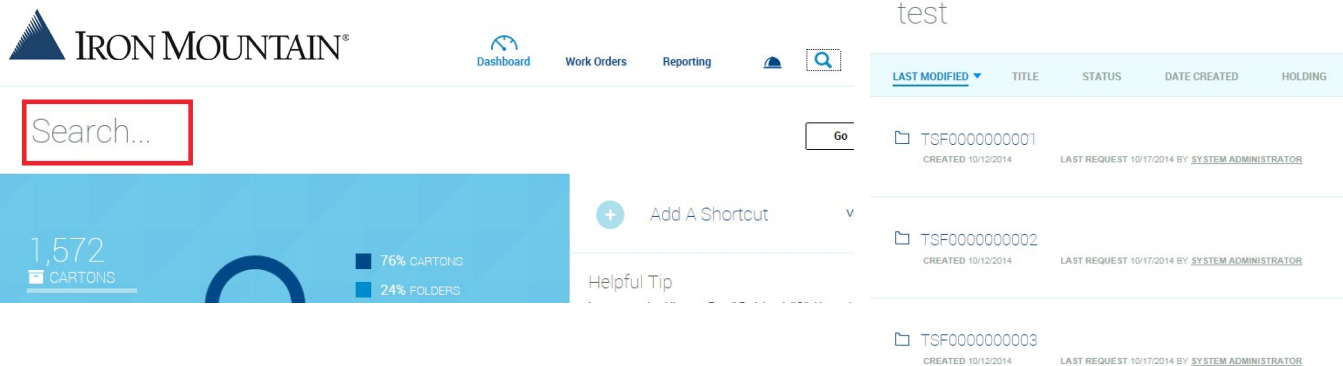
Data intensive reports can be scheduled for automatic generation and can be emailed.

Detailed Inventory				
 Account Name: IRON MOUNTAIN REQUEST WEB DEMO Account Code: RR641700 Inventory as of: April 2017				
RFID	Item Type Code	Account Reference	Record Series Code	Record
Non-RFID	FILEFOLDER	UNKNOWN		
Non-RFID	FILEFOLDER	UNKNOWN		
Non-RFID	FILEFOLDER	UNKNOWN		
Non-RFID	FILEFOLDER	UNKNOWN		
Non-RFID	FILEFOLDER	UNKNOWN		
Non-RFID	FILEFOLDER	UNKNOWN		

## 9.0 SEARCH, ALERTS AND USER PREFERENCES

### 9.1 Quick Search

 Quick Search provides a quick and actionable search across your information.

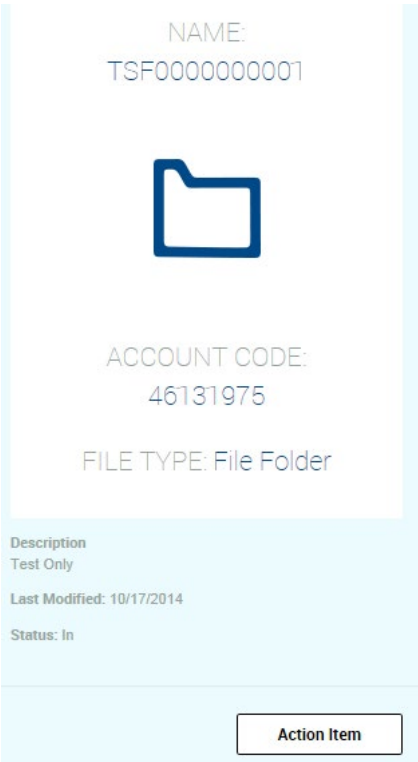


Clicking on the magnifying glass opens up a search tab on the current screen.


Type any keyword, a carton barcode, a description or any other metadata in this box to perform a search and click Go.

Action can be taken directly from the search results. Clicking on a search result provides a snapshot of that item along with the relevant metadata. It shows the last time this item was modified, who was the user requesting that modification and the item's current status.


Clicking on "Action Item" button will show the Records Management Portal screen with the item pre-selected so a work order can be created or any other actions can be taken by the user.



## 9.2 Alerts

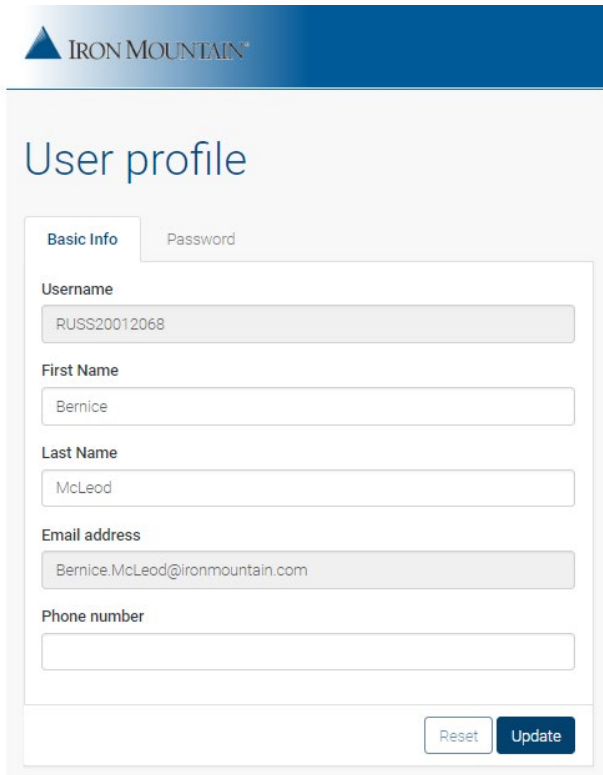
-  The “Alerts” tab shows the latest system generated alerts. Clicking on the Alert icon displays all current alerts. Alerts can include items such as Work Orders pending approval or weather delays.

## 9.3 User Preference

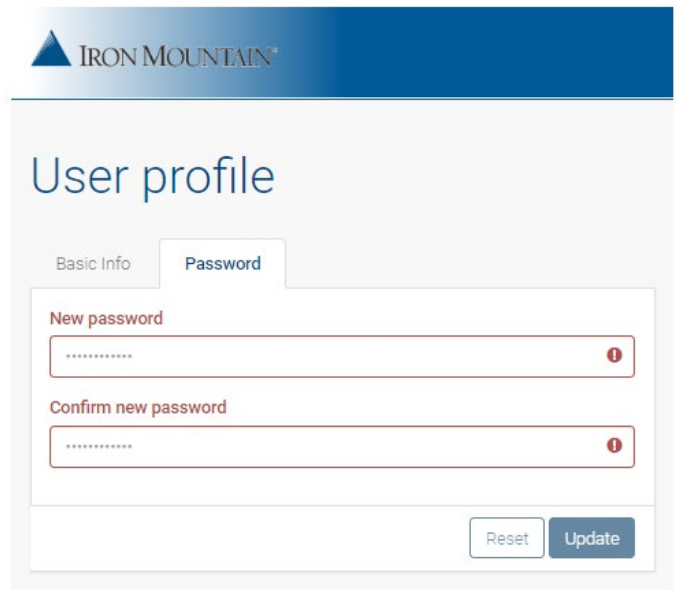
-  User Preference allows users to edit preferences or sign out of the Portal. Clicking on “Your Preferences” displays a list of current selections. Each section can be easily updated by clicking on “Edit Preferences”. Resetting your password has never been so easy. Click on “Edit Preferences” then on “edit” to the right of “Password”.

On the resulting screen enter your current password first and then enter a new password. Online password criteria define what additional characters should be included when creating a password.

New passwords will need to be input twice to ensure validation. The Portal provides real-time feedback on the selected password to ensure validation. Once the new password is validated, click on “Save” button to complete your password reset.



The screenshot shows the 'User profile' page with the 'Basic Info' tab selected. The page has a blue header with the Iron Mountain logo. Below the header, the title 'User profile' is displayed. The 'Basic Info' tab is active, showing fields for Username (RUSS20012068), First Name (Bernice), Last Name (McLeod), Email address (Bernice.McLeod@ironmountain.com), and Phone number. At the bottom right, there are 'Reset' and 'Update' buttons.



The screenshot shows the 'User profile' page with the 'Password' tab selected. The page has a blue header with the Iron Mountain logo. Below the header, the title 'User profile' is displayed. The 'Password' tab is active, showing fields for 'New password' and 'Confirm new password'. Both fields have red error icons. At the bottom right, there are 'Reset' and 'Update' buttons.

## 10.0 ADDITIONAL SUPPORT

If you have any questions or require additional support when using the Iron Mountain Records Management Portal, please contact the Service Delivery Team.

Office Hours: 08:30 to 17:00 (Your local time, Monday to Friday)

Phone:

**(AU) 1300 476 668**

**(NZ) 0800 732 255**

E-mail:

**NSW** - [sdtnsw@ironmountain.com](mailto:sdtnsw@ironmountain.com)

**VIC** - [sdtvic@ironmountain.com](mailto:sdtvic@ironmountain.com)

**ACT** - [sdtact@ironmountain.com](mailto:sdtact@ironmountain.com)

**SA** - [sdtsa@ironmountain.com](mailto:sdtsa@ironmountain.com)

**QLD** - [sdtqld@ironmountain.com](mailto:sdtqld@ironmountain.com)

**WA** - [sdtwa@ironmountain.com](mailto:sdtwa@ironmountain.com)

**NZ** - [sdtnz@ironmountain.com](mailto:sdtnz@ironmountain.com)