
Reporting

IRON MOUNTAIN CONNECT™ RECORDS MANAGEMENT



Using Report Center

Iron Mountain Connect's Report Center is a centralized report repository that contains 30 categorized Records Management and Shredding reports.

Use this guide to learn how to:

- Request and schedule a report
- View reports that were run recently
- View and remove scheduled reports
- Read and understand the different sections contained on reports
- View a list of the reports organized by service area and category

Accessing Iron Mountain Connect Report Center

The Iron Mountain Connect homepage is your single-point entry into all of Iron Mountain's business applications, including Report Center.

1. Access Iron Mountain Connect via www.ironmountainconnect.com.
2. Type your Username and Password to open the home page.
3. Report Center is located in the center of the screen.

The screenshot shows the Iron Mountain Connect homepage. The top navigation bar includes the logo, a welcome message, and links for PROFILE, ENGLISH (US), SUPPORT, and LOG OUT. A HOME button is located in the top left. The main content area is divided into several sections: My Quick Links (Records Management, Shredding, My Profile, Manage Users, Resources, Pay Bill), Resources (View Messages, Email question to support, By Phone contact info), Record Center (Manage your records online, schedule a pickup, and order boxes to be retrieved), Shredding (The Shredding Center allows you to request services and view current visit profiles and upcoming), and Reports (REQUEST A REPORT, MY RECENT REPORTS, SCHEDULED REPORTS). The Reports section includes a search for Category and Service Area, and a table for Report Title and Report Status. Two yellow callout boxes with information icons provide additional context: one points to the Record Center section, stating it is the centralized report repository, and another points to the Reports tabs, instructing users to click through them to request, view recent, or schedule reports.

Report Center is Iron Mountain Connect's centralized report repository.

Click through the three Report Center tabs:

- Request a Report – request and schedule reports
- My Recent Reports – view a list of reports run in the last 30 days; reports can take up to three hours to generate and appear in this list
- Scheduled Reports – view and remove regularly scheduled reports

Requesting and Scheduling a Report

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From the Request a Report tab, select the report Category:

- Activity
- Retention
- Inventory
- Financial

2

Select the Service Area:

- Record Center
- Shredding

Reports that match the Category and Service Area you specified display.

The screenshot shows a web interface for requesting reports. At the top, there are three tabs: 'REQUEST A REPORT' (active), 'MY RECENT REPORTS', and 'SCHEDULED REPORTS'. Below the tabs are two dropdown menus: '* Category:' with 'Retention' selected, and '* Service Area:' with 'Record Center' selected. Below these are two columns: 'Report Title' and 'Report Samples'. The 'Report Title' column lists four reports: 'Destruction Eligibility Forecast', 'Destruction Eligibility List', 'Held Carton Summary', and 'Record Classification List'. The 'Report Samples' column shows a red printer icon and a green 'X' icon for each report.

Report Title	Report Samples
Destruction Eligibility Forecast	
Destruction Eligibility List	
Held Carton Summary	
Record Classification List	

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Click the title of the report you need to run.

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Hover over the Report Title to see a description of the report.

i

Click to open and view sample reports.

Requesting and Scheduling a Report

The report below is a sample. Report filters vary by report.

Carton Inventory Enter the criteria for the Carton Inventory Report

Customer: RC2C1 [RC2 TEST CUSTOMER 1] 4

Include Destroyed and Permanently removed from Iron Mountain Inventory Statuses

Include Long Description

Sort Report By:

- Customer Box Number
- Customer Name, Division Name, Department Name, Customer Box Number
- Customer Name, Division Name, Department Name, Record Code, Customer Box Number
- Customer Name, Division Name, Department Name, Record Code, From Date, To Date, Major Description, Minor Description, Customer Box Number
- Customer Name, Division Name, Department Name, Record Code, SKP Box/Barcode Number
- Customer Name, Division Name, Department Name, SKP Box/Barcode Number
- Destruction Date, Customer Box Number
- Major Description, Minor Description, Customer Box Number
- Receipt Date, Customer Box Number
- SKP Box/Barcode Number

Report Format: CSV 5

Repeats: One Time

Close Window Submit

Set the report parameters.

Select the output format :

- .csv
- .pdf
- .xml

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Click the Repeat field to schedule the frequency of the report:

- One Time - runs the report immediately; displays in the My Recent Reports tab within three hours
- Time intervals - select the appropriate frequency (intervals vary based on the report selected); displays in the Scheduled Reports tab

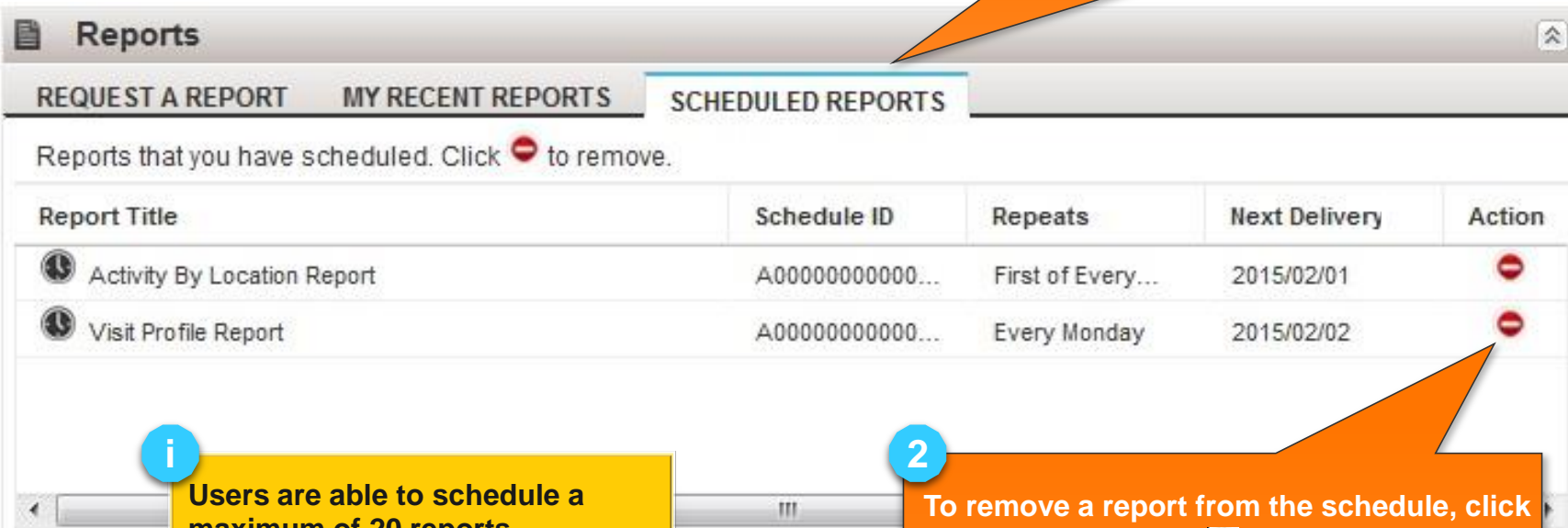
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Click Submit. An onscreen message indicates that your report was successfully submitted. After the report is finished generating, you will receive email notification.

Viewing and Removing Scheduled Reports


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Select the Scheduled Reports tab. The list of scheduled reports displays.




Reports

REQUEST A REPORT MY RECENT REPORTS SCHEDULED REPORTS

Reports that you have scheduled. Click  to remove.

Report Title	Schedule ID	Repeats	Next Delivery	Action
 Activity By Location Report	A00000000000...	First of Every...	2015/02/01	
 Visit Profile Report	A00000000000...	Every Monday	2015/02/02	

i Users are able to schedule a maximum of 20 reports.

2 To remove a report from the schedule, click the remove symbol  to the right of the report. You are prompted to verify the removal, and the screen is refreshed to reflect the change.

Reading and Understanding Reports

Reports are available in .pdf, .csv and .xml formats.

- .pdf reports are formatted with a cover page similar to the one shown below. The cover page includes the report properties and objective, helpful tips and the report parameters, which makes it easier to rerun the report if necessary.



Carton Date Summary

ABC COMPANY

Report Properties

Report Title: Carton Date Summary
Report Subtitle: ABC COMPANY
Job ID: RF012010
Authorized User: carl_x999
Requested On: 10/20/2004 10:33:18
Delivered On: 10/20/2004 10:47:12

Report Parameters

Customer: ABC ABC COMPANY
Division: MASTER MASTER DIVISION
Department: ALL DEPARTMENTS

Report Objective

The Carton Date Summary report displays carton quantities by year for each of the six dates associated with carton inventory. It illustrates both the quality and the quantity of information stored within the formatted date fields of the Record Center (SafeKeeperPLUS).

Help Reading This Report

This report quantifies and summarizes by year all of the dates associated with live cartons. The From Date, To Date, Create Date, and Event Date are optional user-entered fields. The Receipt Date is system-generated, and represents the day the cartons arrived at Iron Mountain. The receipt date can sometimes represent a system conversion date rather than the actual 'date into storage'. The destruction review date is calculated by the Record Center (SafeKeeperPLUS) based on the settings of the carton's record code. Alternatively, clients who haven't implemented a full retention program can manually enter a destruction review date. The column titled 'Receipt Date Only' illustrates cartons that don't have any user-entered dates describing the carton contents - only a system-generated date into storage.

This report contains only data that the requestor is authorized to view.



Reading and Understanding Reports

Reports are categorized as follows:

- Activity - compiled from user data, providing participation statistics and activity history.
- Retention - detailed and summary information related to records classification, retention schedules, hold codes and destruction eligibility. Can be used to audit your company's compliance against your own records management program.
- Inventory - provide snapshots and historic details of data, such as carton inventory and file inventory by type.
- Financial - provides summary activity and projected forecasts, invoice history and activity tied to dollars spent.

Record Center Activity Reports

Category	Report Title	Description
Activity	Account List	Volume and contact information for active Iron Mountain accounts.
Activity	Activity by Location	A summary of ordering activity by location, quantity and order type.
Activity	Cubic Foot Summary Snapshot	A summary of box information including type, description, quantity and cubic footage.
Activity	Retrieval History	The activity history for inventory that is checked out, permanently withdrawn and destroyed.
Activity	Storage Growth Analysis	Detailed storage breakdown with inventory growth analysis.
Activity	Box Data Entry Exception Report	Identifies boxes that were recently received at Iron Mountain with missing metadata.
Activity	IOD Order Audit Report	Captures all IOD orders placed within a specified date range for a selected Customer, Division, and/or Department, regardless of order status.
Activity	XOD Activity Summary	Captures all XOD orders placed during a specified period of time for a selected Customer, regardless of order status.

Note: The User Activity report has been removed from Report Center. An export containing the same data is available from within Manage Users. Refer to the *Managing Users How To* training guide for more information.

Record Center Retention Reports

Category	Report Title	Description
Retention	Destruction Eligibility Forecast	Forecast of carton volumes eligible for destruction review; highlights the number of cartons without assigned destruction review dates. Useful as a planning tool; allows destruction program analysis and forecasts destruction expenditures.
Retention	Destruction Eligibility List	A list of all cartons stored at Iron Mountain that are eligible for destruction review as of report request date.
Retention	Held Carton Summary	Summary of all records with a current hold status, including both hold codes and destruction indicators.
Retention	Record Classification List	A list of all record classes set up in SafeKeeperPLUS and their associated settings.
Retention	Record Classification Summary	A detailed summary of your record classes and the quantity of cartons associated with each class.

Record Center Inventory Reports

Category	Report Title	Description
Inventory	Carton Date Summary	Carton quantities by year for each of the dates associated with carton inventory.
Inventory	Carton Descriptive Details	A detailed list of descriptive data in SafeKeeperPLUS.
Inventory	Carton Inventory	Current inventory report for all cartons stored at Iron Mountain.
Inventory	File Inventory	A detailed review of your active files and their associated descriptive information.
Inventory	Inventory Ownership Summary	A detailed review of the quantity of cartons and files for Division and Departments.

Record Center Financial Reports

Category	Report Title	Description
Financial	Cost and Activity Report	Billing activity for the specified invoice period.
Financial	Invoice to Download	Information about charges that have been invoiced to a customer. Users are able to specify a customer, billing month, and the type of charges to output on the report.
Financial	Records Management	Invoice trend data for Records Management services over a period of time.

Shredding Activity Reports

Category	Report Title	Description
Activity	Scheduled Visit Report	Provides information about upcoming scheduled visits for shredding services. Users are able to specify a customer, date range, and order type when requesting the report.
Activity	Shredding Trend Report	Invoice trend data for shredding services over a period of time. Powerful tool for viewing shredding activity in several ways. For example, by Service (Scheduled vs. On Call) or by Type (charges vs. units).
Activity	Secure Shredding Green Report	A summary of the environmental benefits associated with a customer's shredding program.
Activity	Program Monitoring Report	A list of shredding activities/services, performed over a specified period of time . Also provides a certificate of destruction.
Activity	Visit Profile Summary	A list of your recurring requested shredding services.
Activity	InControl Shredding Usage Report	Summary level information on container volume which is captured during each service with an InControl scanner. By reviewing this information and identifying usage trends over time, customers are able to correct potential compliance issues before they impact the business and to identify opportunities to reduce costs.

Shredding Financial Reports

Category	Report Title	Description
Financial	Invoice Transaction Report	Information about charges that have been invoiced to a customer over a period of time. Users are able to specify a customer, date range, type of charge, and type of shredding service to be included in the output.
Financial	Invoice to Download Report	Information about charges that have been invoiced to a customer. Users are able to specify a customer, billing month, and the type of charges to output on the report.