# Reporting

**IRON MOUNTAIN CONNECT™ RECORDS MANAGEMENT**

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# 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.



**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

**1** 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.

**3** Click the title of the report you need to run.

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

**i** Click to open and view sample reports.

| REQUEST A REPORT | MY RECENT REPORTS | SCHEDULED REPORTS |
|---|---|---|

\* Category:

Retention

\* Service Area:

Record Center

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

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# 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]

☑ 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

Repeats: One Time

[ Close Window ]  [ Submit ]

**4** Set the report parameters.

**5** Select the output format :
- .csv
- .pdf
- .xml

**6** 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
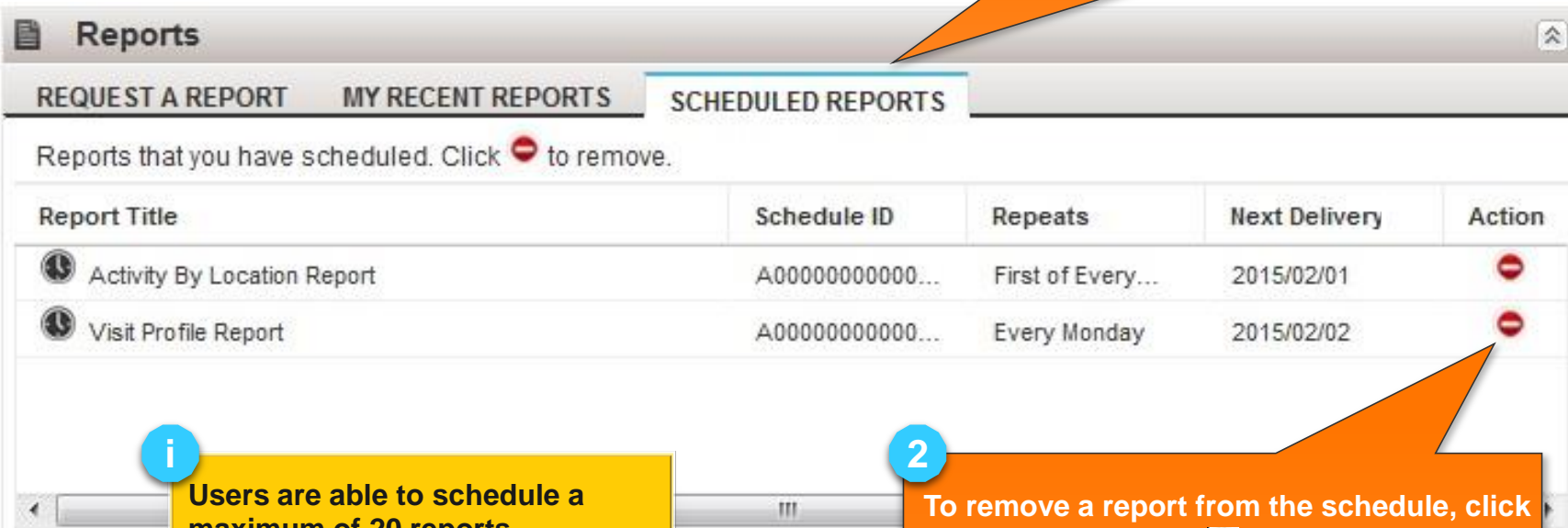
**7** Click Submit.  An onscreen message indicates that your report was successfully submitted.  After the report is finished generating, you will receive email notification.

# Viewing and Removing Scheduled Reports

**1** 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.

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# 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.

# 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.

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# 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. |