

## Completing the Transmittal Sheet/ Using the Barcode Label



### Sending New Records to Iron Mountain Via the Transmittal Sheet

A Transmittal is the medium by which a carton's descriptive information is captured. Iron Mountain provides three types of Transmittals:

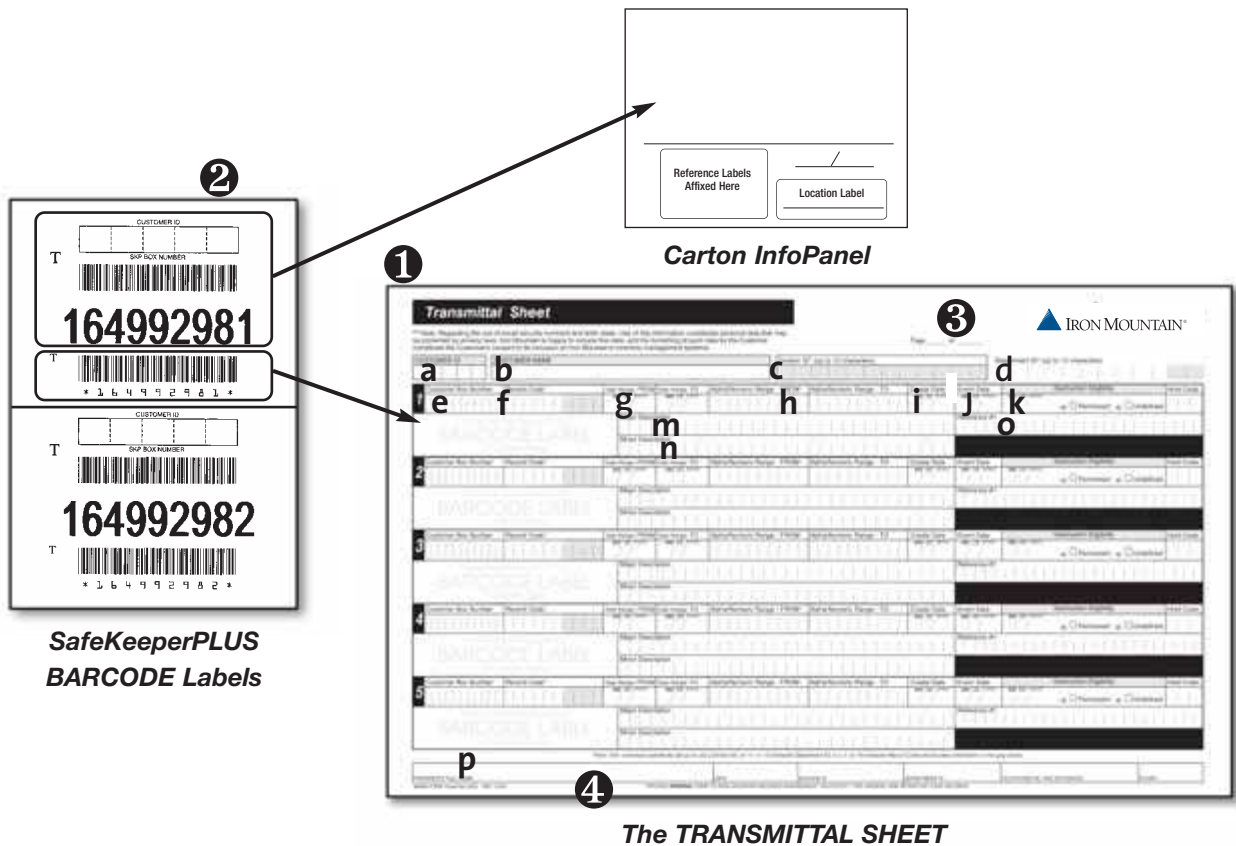
- ▶ The easy-to-complete, multi-carton Transmittal Sheet
- ▶ The easy-to-complete, one-carton-at-a-time Transmittal Form
- ▶ Online data entry by using the Iron Mountain Connect™ records management portal

The Transmittal Sheet and Transmittal Form are off-line methods. The Transmittal Sheet accommodates the descriptive information for up to five cartons per Sheet. The Transmittal Form, in triplicate copy, accepts only one carton per Form. Online data entry is available in limited capacity to some Iron Mountain Connect users who are authorized to access the Inventory Maintenance menu. Contact your Iron Mountain Account Manager for more information about online data entry.

The method you use will depend on how your account is set up. Regardless of the method, however, all descriptive information that is captured is provided back to you via inventory reports generated by Iron Mountain.

#### The Transmittal Sheet

Complete one (1) Transmittal Sheet for each group of five (5) new cartons to be stored at Iron Mountain. Enter the correct information in the areas indicated, clearly and legibly printing all information. Begin all entries from the left side of each field except where noted. Please note that the Iron Mountain systems do not recognize leading zeros in the DIVISION ID, DEPARTMENT ID, and RECORD CODE fields. For example, Department 0001234 would be recognized as Department 1234.



**1** Complete the Transmittal Sheet by printing:

- a. Your four- or five-digit CUSTOMER ID on both the Transmittal Sheet and large peel-off Barcode Label (this is a must).
- b. Your CUSTOMER NAME.
- c. The DIVISION ID\* of the DEPARTMENT, using up to 12 alphanumeric characters.  
\*NOTE: Only customers specifically set up to use Divisions should utilize the DIVISION field.
- d. The DEPARTMENT ID of the new cartons, using up to 10 alphanumeric characters\*.  
\*NOTE: Only customers specifically set up to use extended Department IDs should use blocks 11 and 12.
- e. The CUSTOMER BOX NUMBER for each carton. This field should only be completed if you specifically assign a carton number other than the SafeKeeperPLUS® (SKP) BARCODE NUMBER for your internal tracking purposes.
- f. The RECORD CODE using up to 6 alphanumeric characters\*.  
\*NOTE: Only customers specifically set up to use extended Record Codes should use blocks 7 through 10. If the RECORD CODE parameter is set to '1' or '2', then anything in the DESTROY DATE or DESTRUCTION INDICATOR will be ignored by the system and overridden by the RECORD CODE rules. Only if the parameter is set to '0' or '3', will the system consider these values.
- g. The DATE RANGE/FROM and DATE RANGE/TO, which are the oldest and most recent dates of the records contained in the carton. Retention can be calculated from these dates. Only valid dates including month, day and year are acceptable here.
- h. The ALPHA/NUMERIC RANGE-FROM and ALPHA/NUMERIC RANGE-TO, which are the beginning and ending alphabetical/numerical ranges of the records contained in the carton. The FROM and TO Alpha/Numeric Range fields can be used to describe a name range (Jones through Smith), a numeric "file id" range (20450 through 20567), or an alphanumeric "file id" range (AD123 through BZ784).

- i. The CREATE DATE, which is the date that the materials were packaged and labeled for storage; or, the date that the records were actually created. Retention can be calculated from these dates. Only a valid date including month, day and year is acceptable here.
- j. The EVENT DATE, which is the date of the event that the contents of the carton contains, if applicable. Retention can be calculated from this date. Only a valid date including month, day and year is acceptable here.
- k. The DESTRUCTION ELIGIBILITY, identifies when a carton is scheduled for destruction. Leave this section blank, if your organization establishes DESTRUCTION ELIGIBILITY using RECORD CODES. If your organization does not use RECORD CODES to determine when a carton is eligible for destruction, enter either a valid Destruction Date, (month/day/year) or check one of the DESTRUCTION INDICATORS: Permanent or Undefined.  
 NOTE: Nothing will be destroyed automatically. A letter of authorization from your organization is required for destruction.
- l. The HOLD CODE for each carton, extends the RETENTION PERIOD of a carton. HOLD CODES must be setup on the system prior to use. If records should be retained permanently, select the check box under DESTRUCTION ELIGIBILITY.
- m. The MAJOR DESCRIPTION of the contents of the carton as it is to appear on the Inventory Reports provided by Iron Mountain.

Example: ALE - AMA or 100 - 999 (numeric or alpha ranges must be separated with a dash).

Example: CORRESPONDENCE (complete descriptions may be spelled out).

NOTE: To keep numeric ranges in the proper sort sequence and to maintain an orderly listing, the dash '-' should be placed to the right of the heavy vertical line; fields should be zero-filled where necessary.

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| | | | 0 | 0 | 1 | 2 | 5 | - | 0 | 0 | 1 | 8 | 5 | | | | |
| | | | 1 | 2 | 0 | 5 | 0 | - | 1 | 2 | 1 | 7 | 5 | | | | |

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If the files within the carton will be individually listed, print the phrase "Individual List" in the MAJOR DESCRIPTION field. If you have previously filled out a Division/Department Form, clearly establishing RECORD CODES for each RECORD CODE TITLE, then a MAJOR DESCRIPTION is not necessary.

- n. Print additional MINOR DESCRIPTION information as it is to appear on your Inventory Reports (follow the instructions for MAJOR DESCRIPTION).
- o. The REFERENCE #1 field, which is a miscellaneous, alphanumeric field used for additional cross-reference information about the carton.
- p. Your name in the PREPARER'S FULL NAME field, as well as the DATE, your DIVISION ID, DEPARTMENT ID, TELEPHONE NUMBER and EXTENSION, and FLOOR. At the top of the Sheet, be sure to number the pages in sequence, starting with "Page 1".

**2** Place the large peel-off Barcode Label on the carton's InfoPanel in the area marked 'Affix Transmittal Label Here' on one of the handhold sides. Make sure your Customer ID is also displayed on the Label.

Place the smaller, identically numbered Barcode Label on the Transmittal Sheet in the area marked 'Place the SafeKeeperPLUS® Barcode Label (T-Label) Here'.

**3** Once you have completed all of the Transmittal Sheets for this group of cartons you are sending, count the total number of Sheets and place this total number on all of the Sheets in the space marked "Page \_\_\_\_ of \_\_\_\_". Staple the Sheets together, in order.

**4** Have the originals ready for the driver to pick up with the new cartons. Make photocopies of the Transmittal Sheets for your records.

**5** Verify that the physical carton count matches the itemization on the Transmittal Sheets.

**6** Contact Iron Mountain to schedule a pickup.

\*NOTE: To ensure the accuracy and integrity of your inventory requirements, please review all information listed on the transmittal document to ensure it is complete, accurate and legible, and the document has not been folded or torn before it is submitted to Iron Mountain.

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