ReQuest Web User Guide

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ReQuest Web Overview

Welcome to ReQuest Web

Iron Mountain's web-based ReQuest Web document and data management system allows you to securely access and manage your accounts and information 24/7. ReQuest Web mirrors your organizational processes by using identifiers to describe items, enabling easy searches for inventory, as well as service requests, supply orders, order review, and inventory reporting related to collection, delivery, destruction, and permanent retrieval.

With ReQuest Web, you are able to:

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

What are the benefits of using ReQuest Web?

- **Complete Visibility & Accessibility:** Users have the ability to view all inventory online 24 hours a day, seven days a week.
- **Decision Support:** ReQuest Web acts as a management support tool, enabling you to control 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 link.
- **Customizable Features:** Customize features such as user setup, shopping cart, support for unregistered items, order approval workflow, document level inventory, and IOD (Image On Demand).

ReQuest Web Technical Requirements:
Supported Browsers:

- Microsoft Edge
- Google Chrome

Suggested Screen Resolution:

- For optimal display, set screen resolution to at least 1024 pixels x 768 pixels or higher.

Signing Into ReQuest Web

ReQuest Web provides secure, easy, quick, online access to records and inventory stored and managed through Iron Mountain. With ReQuest Web, you can place and review orders, manage inventory, order supplies, and view detailed reports. Visit the official Iron Mountain website to access ReQuest Web and manage your accounts and inventory. For ReQuest Web sign in support, contact your administrator or your Customer Care Team.

- To access ReQuest Web, visit the Iron Mountain website: www.ironmountain.com
- Hover over the **Login** dropdown menu in the header toolbar on the Iron Mountain website's home page.
- Select **ReQuest Web** from the dropdown menu.
- Enter your email address on the login page, and click **NEXT**.
- Enter your password and select **Login**. You will be directed to the ReQuest Web home dashboard.

Your ReQuest Web User Dashboard

ReQuest Web offers a variety of customizable features for accessing, managing, and organizing your accounts and inventory. Upon sign in, you are automatically routed to the ReQuest Web home dashboard. Navigate the ReQuest Web application and complete user tasks from the dashboard by following the prompts below.

- The **New Order** page is the default dashboard screen. Please refer to **Delivery Order, Image on Demand (IOD) Order, Collection Order, Permout Order**, and **Destruction Order** to learn more about placing inventory orders in ReQuest Web.
- The ReQuest Web header bar menu is located beneath the Iron Mountain ReQuest Web logo in the upper left corner of the dashboard.
- Select from the header bar menu options to **Review Orders**, **Add or Manage Inventory**, **Manage Users**, and **Access Reports**.
- The search bar is located beneath the header bar menu. Please refer to **Basic Search** or **Advanced Search** for more information on locating your inventory in ReQuest Web.
- The menu on the left side of the screen contains the options to perform a **Filter Search** or place **Supply**, **Unregistered** and **Unitemized Inventory** Orders.
- Your shopping cart is located in the upper right corner of the dashboard. Select your shopping cart to review and finalize orders.
- Access Online Help, Chat, Alerts, **Inventory Lists**, and your **User Account** from the menu in the upper right corner of your dashboard.
- Select the Iron Mountain logo in the upper left corner of the screen to return to the ReQuest Web home dashboard from any page in the application.

ReQuest Web Search

Basic Search

Use ReQuest Web's basic search options to locate inventory by its metadata details. With ReQuest Web's basic search feature, enter keywords in the search bar to return all matching inventory results.

1. The **search bar** is located at the top of the ReQuest Web dashboard beneath the header bar. Search for inventory by all metadata fields, or select the dropdown menu in the **All Fields** button  beside the search bar to customize your search to a specific metadata field.
2. Enter keywords or phrases into the search bar.
3. Click the **Search** button  or **Enter** to complete a search.
4. Matching results will display. Please refer to [**Filter Search**](#filter-search), **Advanced Search**, or Uploading a Search File for more information on customizing and narrowing inventory searches in ReQuest Web.

Filter Search

Use ReQuest Web's filter search options to locate inventory through keywords and phrases, search filters, and search types. Quickly and easily locate inventory through applying customizable search filters. Refer to **Advanced Search** for more advanced search features and customizations.

1. If applicable, select **change** beside **All Accounts** in the menu on the left side of the ReQuest Web dashboard to search for inventory under a specific ReQuest Web account.
2. A popup window for account selection will open. Select the desired **account level one** (or customer ID) from the Level 1 dropdown menu.
3. Select the desired **account level two** (or division ID) from the Level 2 dropdown menu.
4. If applicable, select the desired **account level three** (or department ID) from the Level 3 dropdown menu, or type in the Level 3 field to search for the account level.
5. Click **OK**.
6. Below the account number, toggle **All Status** to view all inventory . Toggle specific options to view inventory according to its status:
   - In
   - Pending
   - Out
   - Permout
   - Destroyed
9. Toggle **All Types** to view all inventory . Toggle specific options to view inventory according to its type:
   - Cartons
   - Files
9. At this point, click the **Apply Filter** button to complete the search, or refer to the following steps to continue customizing your search filters.

10. Toggle  **UDD** (User-Defined Date) and select dates from the calendars in the **From date/To date** fields to search for inventory by the user-defined date.
11. Toggle  and enter the appropriate information into the Alternate Code and User Fields **1, 2,** and **3** to add this criteria to your search filter.
12. The **Alternate Code** and **User Fields 1, 2,** and **3** support wild card searches. Use the **asterisk*** symbol to return search results on partial terms: *driv** will return any word starting with "driv" like *driv*er, *driv*ers and *driv*ing; **ment* will return any word ending with "ment" like manage*ment*, replace*ment* and comple*ment*; **possi** will return words that contain the term "possi" in the middle of the word like im*possi*ble and im*possi*bility.
13. Click the **More Filters** dropdown menu, and toggle  **Has Image** to search for inventory with images.
14. Toggle  Sequence **From/To** and enter keywords or phrases in these fields to search for inventory from a specific sequence. The **Sequence From/To** fields also support **wild card** searches; use the **asterisk*** symbol to return search results on partial terms as shown above.
15. Toggle  **From Date/To Date** and add dates to these fields to search for inventory from a certain timeframe.
16. Click the **Apply Filter** button to complete the search.
17. Click the **Clear Filter** button to remove the applied search filters.

Advanced Search

Use ReQuest Web's advanced search options to locate inventory through keywords, search files, and customizable search filters. With ReQuest Web's search features, you may also download search results and save search preferences for future use. Refer to **User Account Preferences** to manage your default search filters.

1. If applicable, select **change** beside **All Accounts** in the menu on the left side of the ReQuest Web dashboard to search for inventory under a specific ReQuest Web account.
2. A popup window for account selection will open. Select the desired **account level one** (or customer ID) from the Level 1 dropdown menu.
3. Select the desired **account level two** (or division ID) from the Level 2 dropdown menu.
4. If applicable, select the desired **account level three** (or department ID) from the Level 3 dropdown menu, or type in the Level 3 field to search for the account level.
5. Click **OK**.
6. Toggle  **All Status** to search within all inventory. Toggle specific options to search for inventory according to its status:
    - In
    - Pending
    - Out
    - Permout
    - Destroyed

7. Toggle **All Types** to search within all inventory types. Toggle specific options to view inventory according to its type:
   - Cartons
   - Files
8. The **search bar** is located at the top of the ReQuest Web dashboard beneath the header bar.

   Search for inventory by all metadata fields, or select the dropdown menu in the **All Fields** button to the left of the search bar to customize your search to a specific metadata field.
9. Enter keywords or phrases into the search bar and click the **Search** button or **Enter** to complete a search.
10. ReQuest Web's search option supports wild card searches for certain metadata fields. Use the **asterisk* symbol** to return partial term search results for prefixes in any metadata field: *driv** will return any word starting with "driv" like *driv*er, *driv*ers and *driv*ing.
11. For **All Fields**, **Item Content**, and **Long Description** only, use the **asterisk* symbol** to return partial term search results for suffixes and syllables in the middle of a word: **ment* will return any word ending with "ment" like manage*ment*, replace*ment* and comple*ment*; **possi** will return words that contain the term "possi" in the middle of the word like im*possi*ble and im*possi*bility.
12. Use **quotations " "** to search for multiple keywords (separated by spaces or commas) in any order: searching for "invoice" "payment" will return inventory with both of these keywords in any order and position in the metadata fields.
13. Select the dropdown menu to the right of the **Search** button to search for inventory in **My Pending Items** or to **Upload a search file**.
14. Select the dropdown menu located in the **Download** button to download the search results as an .html or .excel file. Please refer to **Uploading a Search File** for more information on searching via a file upload.

Uploading a Search File

ReQuest Web provides a search feature that allows you to upload search criteria from a file. Users can create search files that include up to 200 items required for delivery, collection, etc. Once the file has been created, follow the steps below to upload the search file to ReQuest Web and complete the search.

1. Select the dropdown menu beside the **Search** button (located beside the search bar in the upper right corner of the ReQuest Web dashboard) to **Upload a search file**.
2. Select the file from your device to upload to ReQuest Web. Refer to the following requirements for the file:
   - Must be a **text file** with the **.txt extension**
   - **Cannot contain more than 200 items.** Items over this amount will not be processed.
   - **Do not include pending items** (the search will exclude these)
   - **Single inventory type** (only include cartons or files; inventory types cannot be

mixed in the same file)

- Each line of the file after the first line should include the **item ID**
- **No blank lines** (ReQuest Web will read and process the contents of the file until it reaches a blank line; nothing after the blank will be processed)
- Only exact matches will be returned with the following exceptions:
    - The search will perform the same as the single items search. The **All Fields** causes the search to be a contained search on the designated fields.
    - Items not found or items not searched will be displayed in secondary popups with the option to download these items as an Excel file (the format of this Excel file will be the same as the upload file with the addition of a **Status** column in the first position and **criteria** as the last column).
    - Items not found will have an option to **Add Unregistered**, which will route you to the screen for **requesting an unregistered item**.
    - Items found will display on screen and will be available to add to your cart.

ReQuest Web Orders

Orders and Accounts

ReQuest Web enables you to place and manage a variety of orders, depending on your service level agreement. The main order types include delivery, image on demand (IOD) collection, perm out, and destruction inventory orders. You may also place supply orders to contain and label your inventory, and unitemized or unregistered orders for first time delivery or collection of inventory items.

Please note that orders do not need to be placed separately. You may add multiple orders (e.g. delivery, supply, collection, unitemized, etc.) to your cart. Select your shopping cart to review and submit orders.

ReQuest Web offers a variety of services and priority levels for inventory orders. Order services and priorities may include image on demand (IOD), scheduled, and urgent. Please note that available services and priorities may vary depending on your customer agreement. If you have questions regarding order types and services, please contact your Customer Care Team.

Customer Account Levels

With ReQuest Web, you can manage inventory per customer account and organizational department as necessary. Please note that customer account level information and delivery service levels will vary per customer. If your organization utilizes one customer account, you may disregard steps related to changing customer, division or department account levels. Please refer to the different customer account levels as follows:

- **Account Level One:** Customer ID or a unique numeric, alphabetic or alphanumeric identifier, required to access your inventory that is stored with Iron Mountain.
- **Account Level Two:** Division ID or an information management tool that enables the customer to structure the customer account into a logical series of business units called Divisions (e.g. Outpatient Care, Hospice Care, Ambulatory).
- **Account Level Three:** Department ID or an information management tool that enables the customer to divide the customer account into a logical series of business units under a Division ID (e.g. Pediatrics, Cardiology, Obstetrics).

Delivery Order

A delivery order is a request for inventory to be delivered from storage at Iron Mountain to your location. Use the steps listed below to deliver inventory from storage at Iron Mountain. Refer to **Collection Order** to learn how to send inventory to Iron Mountain for storage.

1. Locate your inventory items by completing a **Basic Search, Filter Search** or an **Advanced Search**. Search for inventory items by status by toggling  the options beneath the **All Status** section in the menu on the left side of the dashboard:
    - In (eligible for delivery order)
    - Pending
    - Out
    - Permout
    - Destroyed

2. Click the **Apply Filter** button to complete the inventory search.
3. Click **Deliver** for the appropriate inventory item(s). The inventory has been added to your cart.
4. Select your **cart** by clicking the shopping cart icon in the upper right corner of the screen.
5. *(If your organization uses **one** customer account for all inventory, skip to step 10).* Select **change** beside the **Charge account** number to select the appropriate customer account for billing and tracking purposes.
6. A popup window for account selection will open. Select the desired **account level one** (or customer ID) from the Level 1 dropdown menu.
7. Select the desired **account level two** (or division ID) from the Level 2 dropdown menu.
8. If applicable, select the desired **account level three** (or department ID) from the Level 3 dropdown menu, or type in the Level 3 field to search for the account level.
9. Click **OK**.
10. If recurring transport orders are enabled for your organization, the delivery service will default to scheduled. For this service type, please refer to **Scheduled Orders.** Otherwise, select the appropriate option:
    - Iron Mountain will deliver items to me
    - I will pickup or view items at Iron Mountain
    - Iron Mountain will ship to me (third party)
11. Verify the **delivery address**, or select the appropriate **delivery address** from the dropdown menu.
12. Select a **delivery priority** such as routine or urgent (available priority types may vary per customer).
13. Complete the following fields:
    - Contact Name
    - Phone Number
    - PO Number
    - Special Instructions
15. Complete the inventory item fields if necessary:
    - Requested By
    - Cost Center
    - Comment
16. Select **Apply to All** to apply the entered information to all inventory in your cart.
17. Select the **shopping cart** icon beside the inventory item description to remove the item from your order.
18. Click **Search For More Items** to return to the ReQuest Web dashboard.
19. Click **Send Order** to submit your delivery order.

Image on Demand (IOD) Order

An Image on Demand (IOD) order is a request for individual files in an Iron Mountain storage facility to be converted and delivered to the customer digitally. When a user places an IOD order, the requested file is retrieved from storage, scanned and digitized, and emailed to the customer. IOD orders are only applicable to individual files (not cartons), and must be placed by authorized users. Please refer to **User Management** for more information on granting individual users with

IOD order authorization.

1. Locate your inventory items by completing a **Basic Search, Filter Search**, or **Advanced Search**. Search for inventory items by status by toggling the options beneath the **All Status** section in the menu on the left side of the dashboard:
    - In (eligible for IOD)
    - Pending
    - Out
    - Permout
    - Destroyed
2. Locate inventory items by type by toggling the **All Types** option. *Please note that only individual files are eligible for IOD orders.*
3. Toggle **Files** as the inventory type.
4. Click the **Apply Filter** button to complete the inventory search.
5. Click **Image on Demand** for the appropriate inventory item(s). The inventory has been added to your cart..
6. Select the **shopping cart** icon in the upper right corner of the screen to review and submit orders for approval.
7. *(If your organization uses **one** customer account for all inventory, skip to step 12).* Select **change** beside the **Charge account** number to select the appropriate customer account for billing and tracking purposes.
8. A popup window for account selection will open. Select the desired **account level one** (or customer ID) from the Level 1 dropdown menu.
9. Select the desired **account level two** (or division ID) from the Level 2 dropdown menu.
10. If applicable, select the desired **account level three** (or department ID) from the Level 3 dropdown menu, or type in the Level 3 field to search for the account level.
11. Click **OK**.
12. Your email address is automatically populated as the IOD delivery destination. Use the **Additional e-mail(s)** field to add more IOD delivery recipients if necessary.
13. Select a **delivery priority**, such as routine or urgent (available priority types may vary per customer).
14. Complete or review the following fields:
    - Contact Name
    - Phone Number
    - PO Number
    - Special Instructions

2. Toggle **Entire File** to retrieve the entire file digitally.
3. To retrieve specific pages of the file, leave **Entire File** off. Enter the desired page details or numbers in the **Enter page details** field.
4. Select the **shopping cart** icon beside the inventory item description to **remove** the item from your order.
5. Click **Search For More Items** to return to the ReQuest Web dashboard.
6. Click **Send Order** to submit your IOD order.

Collection Order

A collection order is a request for new or returning inventory to be collected from your location and transported <u>to</u> an Iron Mountain storage facility. Use the steps listed below to request collection of inventory for storage at Iron Mountain. Refer to **[Delivery Order]** to learn how to retrieve inventory <u>from</u> Iron Mountain.

- Locate your inventory items by completing a **Basic Search**, **[Filter Search]** or an **Advanced Search**. Customize your search by toggling the options beneath the **All Status** section in the menu on the left side of the home dashboard:  :
  - In
  - Pending (eligible for collection order)
  - Out (eligible for collection order)
  - Permout
  - Destroyed

2. Click the **Apply Filter** button to complete the inventory search.
3. Click **Collect**  for the appropriate inventory item(s). The inventory has been added to your cart.
4. Select your **cart** by clicking the shopping cart icon in the upper right corner of the screen.

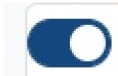
5. *<u>(If your organization uses **one** customer account for all inventory, skip to step 10).</u>* Select **change** beside the **Charge account** number to select the appropriate customer account for billing and tracking purposes.
6. A popup window for account selection will open. Select the desired **account level one** (or customer ID) from the Level 1 dropdown menu.
7. Select the desired **account level two** (or division ID) from the Level 2 dropdown menu.
8. If applicable, select the desired **account level three** (or department ID) from the Level 3 dropdown menu, or type in the Level 3 field to search for the account level.
9. Click **OK**.
10. If recurring transport orders are enabled for your organization, the delivery service will default to scheduled. For this service type, please refer to **Scheduled Orders**. Otherwise, select the appropriate option:
    - Iron Mountain will collect items from me
    - I will deliver items to Iron Mountain
11. Verify the **delivery address**, or select the appropriate delivery address from the dropdown menu.
12. If applicable, select a **collection priority**, such as **routine** or **urgent** (available priority types may vary per customer).
13. Complete the following fields:
    - Contact Name
    - Phone Number
    - PO Number
    - Special Instructions
14. Complete the inventory item fields if necessary:

- Requested By
- Cost Center
- Comment

15. Select **Apply to All** to apply the entered information to all inventory in your cart.
16. Select the **shopping cart** icon  beside the inventory item description to **remove** the item from your order.
17. Click **Search For More Items** to return to the ReQuest Web dashboard.
18. Click **Send Order** to submit your collection order.

Perm Out Order

A perm out order is for inventory that will not be returned to Iron Mountain for storage. Use this option to request delivery of inventory that will be retrieved permanently, or to notify Iron Mountain that inventory items currently at your location will be permanently retained. Follow the steps below to request permanent retrieval for inventory stored at Iron Mountain.

- Locate your inventory items by completing a **Basic Search, [Filter Search](#)** or an **Advanced Search**. Customize your search by toggling the options beneath the **All Status** section in the menu on the left side of the home dashboard:  :
    - In (eligible for permout order)
    - Pending
    - Out (eligible for permout order)
    - Permout
    - Destroyed

2. Click the **Apply Filter** button to complete the inventory search.
3. Click **Permout**  for the appropriate inventory item(s). The inventory has been added to your cart.
4. Select your **cart** by clicking the shopping cart icon in the upper right corner of the screen.

5. *(If your organization uses **one** customer account for all inventory, skip to step 10).* Select **change** beside the **Charge account** number to select the appropriate customer account for billing and tracking purposes.
6. A popup window for account selection will open. Select the desired **account level one** (or customer ID) from the Level 1 dropdown menu.
7. Select the desired **account level two** (or division ID) from the Level 2 dropdown menu.
8. If applicable, select the desired **account level three** (or department ID) from the Level 3 dropdown menu, or type in the Level 3 field to search for the account level.
9. Click **OK**.
10. If the inventory is already at your location, the selection **I already have the items** will be checked. For permout delivery orders, verify the **delivery address**, or select the appropriate **delivery address** from the dropdown menu.
11. Complete the following fields:
    - Contact Name

- Phone Number
- PO Number
- Special Instructions

12. Complete the inventory item fields if necessary:
    - Requested By
    - Cost Center
    - Comment
13. Select **Apply to All** to apply the entered information to all inventory in your cart.
14. Select the **shopping cart** icon  beside the inventory item description to **remove** the item from your order.
15. Click **Search For More Items** to return to the ReQuest Web dashboard.
16. Click **Send Order** to submit your perm out order.

Destruction Order

A destruction order is a request for certified destruction of inventory that has reached the end of its information life cycle. Storing inventory for the proper amount of time, and securely destroying the inventory in a timely manner, ensures adherence to state and federal laws and industry regulations. Please note that inventory items that are stored under a **permanent** status cannot be added to a destruction order.

1. Locate your inventory items by completing a **Basic Search, Filter Search** or an **Advanced Search**. Search for inventory items by status by toggling the options beneath the **All Status** section in the menu on the left side of the dashboard  :
    - In (eligible for destruction order)
    - Pending
    - Out
    - Permout
    - Destroyed
2. Click the **Apply Filter** button to complete the inventory search.
3. Click **Destroy**  for the appropriate inventory item(s). The inventory has been added to your cart.
4. Select your **cart** by clicking the shopping cart icon in the upper right corner of the screen.


5. *(If your organization uses **one** customer account for all inventory, skip to step 10).* Select **change** beside the **Charge account** number to select the appropriate customer account for billing and tracking purposes.
6. A popup window for account selection will open. Select the desired **account level one** (or customer ID) from the Level 1 dropdown menu.
7. Select the desired **account level two** (or division ID) from the Level 2 dropdown menu.
8. If applicable, select the desired **account level three** (or department ID) from the Level 3

dropdown menu, or type in the Level 3 field to search for the account level.

9. Click **OK**.
10. Enter or verify the following information:
    - Contact Name
    - Phone Number
    - PO Number
    - Special Instructions
11. Complete the inventory item fields if necessary:
    - Requested By
    - Cost Center
    - Comment
12. Select **Apply to All** to apply the entered information to all inventory in your cart.
13. Select the **shopping cart** icon  beside the inventory item description to **remove** the item from your order.
14. Click **Search For More Items** to return to the ReQuest Web dashboard.
15. Click **Send Order** to submit your destruction order.

Unitemized Order

An unitemized order is a quick pickup order requesting collection of new inventory for storage at Iron Mountain. Once you have placed a supply order and your inventory is ready for pickup, use the unitemized order option to request collection of the inventory from your location and transportation to an Iron Mountain storage facility.

1. Scroll down to the bottom of the menu located on the left side of the ReQuest Web dashboard until you reach the **Supplies** tab.
2. Select the **Unitemized** tab.
3. Adjust the quantity for inventory requiring pickup in the **Qty** field.
4. Click the **shopping cart icon**  to add the pickup order(s) to your cart.
5. Repeat for as many inventory items as necessary.
6. Select your **cart** by clicking the shopping cart icon  in the upper right corner of the dashboard.
7. *(If your organization uses **one** customer account for all inventory, skip to step 12).* Select **change** beside the **Charge account** number to select a different customer account. This is the account that the order will be billed to.
8. A popup window for account selection will open. Select the desired **account level one** (or customer ID) from the Level 1 dropdown menu.
9. Select the desired **account level two** (or division ID) from the Level 2 dropdown menu.
10. If applicable, select the desired **account level three** (or department ID) from the Level 3 dropdown menu, or type in the Level 3 field to search for the account level.
11. Click **OK**.
12. If recurring transport orders are enabled for your organization, the delivery service will default to scheduled. For this service type, please refer to **Scheduled Orders.** Otherwise, select the appropriate option:
    - Iron Mountain will collect items from me
    - I will deliver items to Iron Mountain

13. Verify the **delivery address**, or select the appropriate delivery address from the dropdown menu.
14. If applicable, select a **collection priority**, such as **routine** or **urgent** (available priority types may vary per customer).
15. Complete the following fields:
    - Contact Name
    - Phone Number
    - PO Number
    - Special Instructions
16. Complete the inventory item fields if necessary:
    - Requested By
    - Cost Center
    - Comment
16. Select the **shopping cart** icon  beside the inventory item description to remove the item from your order.
17. Click **Search For More Items** to return to the ReQuest Web dashboard.
18. Click **Send Order** to submit your unitemized order.

Unregistered Order (Single Item)

An unregistered order is a delivery order for files that have not previously been assigned barcodes or retrieved from an Iron Mountain storage facility. Unregistered items may be requested singularly or as a batch. Please note that to place an unregistered order, you will need the Iron Mountain barcode or alternate code assigned to the carton containing the unregistered items.

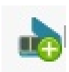
1. In the menu on the left side of the ReQuest Web dashboard, select **Request Unregistered** beneath the **More filters** section.
2. The default account number will display under **Account**. If applicable, select **change** beside the account number to switch to a different account.
3. A popup window for account selection will open. Select the desired **account level one** (or customer ID) from the Level 1 dropdown menu.
4. Select the desired **account level two** (or division ID) from the Level 2 dropdown menu.
5. If applicable, select the desired **account level three** (or department ID) from the Level 3 dropdown menu, or type in the Level 3 field to search for the account level.
6. Click **OK.**
7. Enter the File Identifier (a method for identifying the requested file, such as a case number or title) and/or Short Description (a description of your file, such as the color or size) in the required fields.
8. Select a Parent type from the dropdown menu (e.g. Iron Mountain Barcode or Alternate Code).
9. Enter the Parent Identifier (a method for identifying the box or carton containing the requested file).
10. Click the **Delivery**  button to add the unregistered items to your cart as a **delivery order**.
11. If Image on Demand access is enabled for the user, click the **Image on Demand** button  to add the unregistered items to your cart as an **image on demand (IOD) order**.

12. Unregistered items and their identifiers will display below **Unregistered items in cart.**

    Select the **shopping cart** icon  in the upper right corner of the screen to review, place or submit orders for approval.

Unregistered Order (Multiple Items)

An unregistered order is a delivery order for files that have not previously been assigned barcodes or retrieved from an Iron Mountain storage facility. Unregistered items may be requested singularly or as a batch. Please note that to place an unregistered order, you will need the Iron Mountain barcode or alternate code assigned to the carton containing the unregistered items.

1. In the menu on the left side of the ReQuest Web dashboard, select **Request Unregistered** beneath the **More filters** section.
2. The default account number will display under **Account**. If applicable, select **change** beside the account number to switch to a different account.
3. A popup window for account selection will open. Select the desired **account level one** (or customer ID) from the Level 1 dropdown menu.
4. Select the desired **account level two** (or division ID) from the Level 2 dropdown menu.
5. If applicable, select the desired **account level three** (or department ID) from the Level 3 dropdown menu, or type in the Level 3 field to search for the account level.
6. Click **OK**.
7. A spreadsheet template for requesting multiple unregistered items is located on the right side of the screen. Select the delimiter for separating the order information (e.g. comma, pipe, colon, semicolon), and click **Download Template**.
8. Enter the order information into the spreadsheet, and save the spreadsheet as a **CSV**.
9. Return to the **Request Unregistered** screen in Request Web.
10. Select the **Browse to upload button** beneath the **Download Template** option to upload the spreadsheet from your device.
11. Click **Upload Selected Files.**
12. Click the **Delivery** button  to add the unregistered items to your cart as a **delivery order.**
13. If Image on Demand access is enabled for the user, click the **Image on Demand** button  to add the unregistered items to your cart as an **image on demand (IOD) order**.
14. Unregistered items and their identifiers will display below **Unregistered items in cart.**

    Select the **shopping cart** icon  in the upper right corner of the screen to review, place or submit orders for approval.

Supply Order

A supply order is a request to Iron Mountain for storage supplies such as empty cartons, carton barcode labels, file barcode labels, and more. Use the steps listed below to request supplies for the secure storage and transportation of your inventory.

1. Scroll down to the bottom of the menu located on the left side of the ReQuest Web dashboard until you reach the **Supplies** tab.
2. Adjust the quantity for desired supply types in the **Qty** field.

3. Click the **shopping cart icon** to add the supplies to your cart.
4. Select **View more supplies** to access the full list of available supply types.
5. Adjust the quantity for desired supplies in the **Qty** field.
6. Click the **shopping cart icon** to add the supplies to your cart.
7. Repeat the steps above for as many different supply quantities as necessary.
8. Click the **Star** icon to add the supply type to the **Supplies** tab for easy access.
9. Select your **cart** by clicking the shopping cart icon in the upper right corner of the dashboard.
10. *(If your organization uses **one** customer account for all inventory, skip to step 15).* Select **change** beside the **Charge account** number to select the appropriate customer account for billing and tracking purposes.
11. A popup window for account selection will open. Select the desired **account level one** (or customer ID) from the Level 1 dropdown menu.
12. Select the desired **account level two** (or division ID) from the Level 2 dropdown menu.
13. If applicable, select the desired **account level three** (or department ID) from the Level 3 dropdown menu, or type in the Level 3 field to search for the account level.
14. Click **OK**.
15. If recurring transport orders are scheduled for your organization, the delivery service will default to scheduled. For this service type, please refer to **Scheduled Orders.** Otherwise, select the appropriate option:
    - Iron Mountain will deliver items to me
    - I will pickup or view items at Iron Mountain
    - Iron Mountain will ship to me (third party)
16. Verify the **delivery address**, or select the appropriate delivery address from the dropdown menu.
17. Complete the following fields:
    - Contact Name
    - Phone Number
    - PO Number
    - Special Instructions
18. Complete the inventory item fields if necessary:
    - Requested By
    - Cost Center
    - Comment
19. Select **Apply to All** to apply the entered information to all inventory in your cart.
20. Select the **shopping cart** icon beside the inventory item description to remove the item from your order.
21. Click **Send Order** to place your supply order, or to submit your supply order for approval.

Scheduled Orders

If recurring transport orders are enabled for your organization, the delivery service for inventory and supply orders will default to scheduled. After adding inventory or supply items to your cart, refer to the steps below to submit the scheduled order. If you do not wish to place the order under the scheduled service, select Address and Priority as the service and refer to the process for the appropriate order type: **Delivery Order, Supply Order, Unitemized Order.**

1. Select your shopping cart  in the upper right corner of the screen.
2. Select the appropriate **delivery address and schedule** from the available options beneath **Schedule**.
3. Complete and review the following fields:
    - Contact Name
    - Phone Number
    - PO Number
    - Special Instructions
3. Complete the inventory item fields if necessary:
    - Requested By
    - Cost Center
    - Comment
4. Select **Apply to All** to apply the entered information to all inventory in your cart.
5. Select the shopping cart icon  beside the inventory item description to **remove** the item from your order.
6. Click **Send Order** to submit your scheduled order.

ReQuest Web Order Review

Approving Orders

ReQuest Web orders may require approval before processing. Access order approval notifications by selecting the message/envelope icon located in the upper right corner of the ReQuest Web home dashboard. You may also review orders by selecting the **Review Orders** option in the header toolbar.

1. **To access new pending orders, select the message/envelope icon in the upper right corner of the ReQuest Web dashboard.**
2. In the **You have Order(s) Pending Approval** notification, select **Click to review.**
3. To manage order approval, you may also select **Review Orders** in the header toolbar.
4. Select **Pending Approval** from the menu at the top of the **Review Orders** page.
5. Pending orders will display on screen. After reviewing the order details, click **Approve** to confirm the order**,** or click **Cancel** to cancel the order.
6. For multiple pending orders, you may also select **Combine Orders** or **Approve all orders** in the upper right corner of the screen.

Reviewing Submitted Orders

ReQuest Web orders may require approval before processing. You can review different order types, such as submitted, pending approval, and recurring orders, from the **Review Orders** option in the header bar menu. Please refer to **Adding Inventory to a List** for more information on ReQuest Web's updated features for saving orders and loading saved orders.

1. Select **Review Orders** from the ReQuest Web dashboard header bar. Order review defaults to the **Submitted** tab.
2. If applicable, select **change** beside **All Accounts** to review orders submitted per a specific account.
3. A popup window for account selection will open. Select the desired **account level one** (or customer ID) from the Level 1 dropdown menu.
4. Select the desired **account level two** (or division ID) from the Level 2 dropdown menu.
5. If applicable, select the desired **account level three** (or department ID) from the Level 3 dropdown menu, or type in the Level 3 field to search for the account level.
6. Click **OK**.
7. Search for orders submitted during a specific timeframe by selecting dates from the calendars beside the **Orders Between** fields.
8. If applicable, toggle WO Image only to locate to locate IOD orders.
9. Search for submitted orders by typing keywords related to the order or the requested inventory into the search bar.

10. Select the **Search** button to complete the order search.
11. Select the dropdown menu in the **All Fields** button to specify your submitted order search to one of the following:
    - Contact Name
    - PO Number
    - Work Order Code
11. Click the **Search** button to complete your search. Submitted orders matching your search criteria will display below the search bar.
12. Select **Details** to review order information.
13. Select **Email me** or **Forward** to email the order information to yourself or another recipient.

Reviewing Pending Approval Orders

ReQuest Web orders may require approval before processing. You can review different order types, such as submitted, pending approval, and recurring orders, from the **Review Orders** option in the header bar menu. Please refer to **Adding Inventory to a List** for more information on ReQuest web's updated features for saving orders and loading saved orders.

1. Select **Review Orders** from the ReQuest Web dashboard header bar.
2. Select the **Pending Approval** tab to review orders that require your approval before processing.
3. Select **Combine Orders** to combine all orders, or select **Approve all orders** to approve all pending orders.
4. Select **Cancel** to cancel beneath any pending order to cancel the order.

Reviewing Recurring (Scheduled) Orders

ReQuest Web orders may require approval before processing. You can review different order types, such as submitted, pending approval, and recurring orders, from the **Review Orders** option in the header bar menu. Please refer to **Adding Inventory to a List** for more information on ReQuest web's updated features for saving orders and loading saved orders.

1. Select **Review Orders** from the ReQuest Web dashboard header bar.
2. Select the **Recurring** tab to review recurring (scheduled) ReQuest Web orders.
3. If applicable, select **change** beside **Orders For** to review recurring orders under a specific account.
4. A popup window for account selection will open. Select the desired **account level one** (or customer ID) from the Level 1 dropdown menu.
5. Select the desired **account level two** (or division ID) from the Level 2 dropdown menu.
6. If applicable, select the desired **account level three** (or department ID) from the Level 3 dropdown menu, or type in the Level 3 field to search for the account level.
7. Click **OK**.
8. Recurring (scheduled) orders will display. Select **Details** to review all order information and remove items from the order.

9. Under the **Items to deliver** section, select the **trashcan** icon to remove an item from the order.
10. Click the **Back** button in the lower right corner of the screen to return to the **Recurring Orders** page.

Reviewing Pending Customer Confirmation Orders

Pending Customer Confirmation orders require a physical signature in order to be processed. Orders that require customer confirmation are requests for permanent retrieval (**Perm Out Order**) or destruction of inventory (**Destruction Order**).

1. Select **Review Orders** from the ReQuest Web dashboard header bar.
2. Select **Review Orders** from the header bar.
3. Select the **Pending Customer Confirmation** tab. Orders that require customer confirmation (perm out and destruction orders) will display.
4. Select **Details** to review all order information and customer confirmation requirements.
5. In order to finalize any orders pending customer confirmation, print the order page by selecting the **Print** icon in the upper right corner of the screen.
6. Provide a **signature** in the field located at the bottom of the page.
7. **Scan** and **send** the order confirmation to your **Customer Care Team** to approve the order.

Removing Inventory from an Order

Modify or cancel a Recurring (Scheduled) ReQuest Web order by removing its inventory items. Please contact Customer Care to cancel all other ReQuest Web orders after submission.

1. Select **Review Orders** from the ReQuest Web dashboard header bar.
2. Select the **Recurring** tab to review recurring (scheduled) ReQuest Web orders.
3. If applicable, select **change** beside **Orders For** to review recurring orders under a different account.
4. A popup window for account selection will open. Select the desired **account level one** (or customer ID) from the Level 1 dropdown menu.
5. Select the desired **account level two** (or division ID) from the Level 2 dropdown menu.
6. If applicable, select the desired **account level three** (or department ID) from the Level 3 dropdown menu, or type in the Level 3 field to search for the account level.
7. Click **OK**.
8. Recurring (scheduled) orders will display. Select **Details** to review all order information and remove items from the order.
9. Under the **Items to deliver** section, select the **trashcan** icon to remove an item from the order.
10. Remove all inventory items to **cancel** the order.

ReQuest Web Inventory Management

Adding and Managing Inventory

Add and manage ReQuest Web inventory by adding boxes and files as pending items, or add bulk inventory by uploading inventory information from a file. All new inventory items are added under a pending status. Once processed, you may **edit** or remove pending items, **add pending items to a list**, or add pending items to a **collection order**.

1. Select the **Add/Manage Inventory** option in the ReQuest Web dashboard header bar.
2. Select **Add Pending Item** from the dropdown menu to add a carton (box) or file.
3. Select **Add Box** or **Add File** beside the appropriate account number.
4. Enter and confirm the **box** (carton) or **file barcode** in the **Box Barcode** or **File Barcode** field.
5. All metadata fields will display on screen. Enter the appropriate information in as many metadata fields as possible for future identification. Please note the following:
    - Required fields will display in red
    - Any custom labels will display in place of User Fields 1, 2, 3 (e.g. Contract Title, Case Number, Employee Name, etc)
6. Click **Save** to add the inventory as a pending item.
7. Select **Add Box** or **Add File** to continue adding inventory items. *Please note that when adding multiple pending items, you may select the **Previous** and **Next** buttons in the lower right corner of the screen to navigate between items.*
8. To access your pending items, select **Add/Manage Inventory** from the header bar.
9. Select **My Pending Items** from the dropdown menu.
10. Your pending items will display. You may select from the following options:
    - Edit the item
    - View the item’s history
    - Remove the item (*Pending items can only be removed by the user who added the items).*
11. Click **Collect** to begin placing a **collection order** for the desired pending inventory.

Adding Bulk Inventory Items

Add and manage ReQuest Web inventory by adding boxes and files as pending items, or add bulk inventory by uploading inventory information from a file. All new inventory items are added under a pending status. Once processed, you may **edit** or remove pending items, **add pending items to a list**, or add pending items to a **collection order**.

1. Select the **Add/Manage Inventory** option in the ReQuest Web dashboard header bar.
2. Select **Upload New Items File** from the dropdown menu.
3. Select your preferred delimiter (e.g. comma, pipe, colon, semicolon), and then **Download Template** in the lower right corner of the screen to download the Items File template.
4. After entering the required information in the **Items File** spreadsheet, save the document as a **CSV**.
5. Return to the **Upload New Items File** screen.
6. Click **Browse to upload**, and select the completed spreadsheet from your device.
7. Select the **Upload Items** button in the lower right corner of the screen to add the inventory items. You will receive an email notification when the Items File has been processed.
8. To access your pending items, select **Add/Manage Inventory** from the header bar.
9. Select **My Pending Items** from the dropdown menu.
10. Your pending items will display. You may select from the following options:
    - Edit the item
    - View the item's history
    - Remove the item (*Pending items can only be removed by the user who added the items).*
11. Click **Collect** to begin placing **collection orders** for the desired pending inventory.

Adding Inventory to a List

In ReQuest Web's updated interface, organize and save inventory in different list formats for future use and access. Adding inventory to a list is the updated method for saving your orders. Return to your saved inventory lists to load, place and submit orders.

1. Locate your inventory items by completing a **Basic Search**, **Filter Search** or an **Advanced Search**. Customize your search by toggling the options beneath the **All Status** section in the menu on the left side of the home dashboard:
    - In
    - Pending
    - Out
    - Permout
    - Destroyed
2. Click the **Apply Filter** button to complete the inventory search.
3. Hover over **Add to list** under the appropriate inventory item(s).
4. For new inventory lists, select **Create new list**.
5. Enter a title for the list in the **List Name** field.

6. Click **Create List**. The selected inventory will be added to the new list.
7. To add inventory to an existing list, hover over **Add to list** under the appropriate inventory item(s).
8. Select the appropriate list from the menu. The selected inventory will be added to the list.
9. To access your lists, select the hamburger menu in the upper right corner of the screen. You will be routed to the **Inventory Lists** page.
10. Select **Remove from List** to remove an inventory item from a list.
11. Select **Collect**, **Deliver**, **Perm Out**, **Destroy** or **IOD** (if available) to begin placing an order for inventory items from the list.

Editing Inventory

Use ReQuest Web's editing tools to manage inventory metadata and review inventory activity. ReQuest Web User Roles 2, 4, 5, 6, 8, and 9 can edit inventory: Refer to **User Management** for more information on user roles and permissions. Please note that you may only edit active inventory items (excluding permanently withdrawn and destroyed inventory).

1. Locate your inventory items by completing a **Basic Search**, **Filter Search** or an **Advanced Search**. Search for inventory items by status by toggling the options beneath the **All Status** section in the menu on the left side of the dashboard :
   - In
   - Pending
   - Out
2. Click the **Apply Filter** button to complete the inventory search.
3. In the upper right corner of an inventory item, click the **plus (+)** or **minus (-)** icons to expand or collapse inventory metadata.
4. Select the **clock** icon to view the inventory's activity **history**.
5. Select the **pencil** icon to **edit** the inventory item's details and metadata.
6. Make the desired changes, and click the **Save** button.

Accessing Reports

Use ReQuest Web's reporting feature to generate reports with detailed order activity, billing information, inventory item statuses, destruction cycles, permanently retrieved inventory, and more.

1. Select **Reports** from the ReQuest Web dashboard header bar.
2. If applicable, click **Select an Account** to generate reports per a specific account.
3. A popup window for account selection will open. Under each account level, click the pencil icon to add or remove an account.
4. Enter the account name or number in the search field, and click **Search**.
5. Select the desired account from the search results, and click **Ok**.

6. Click the **X** beside the account number to remove the account.
7. After making the desired changes, select **Apply**.
8. Select the dropdown menu beside the most recent month/year to generate a report per a specific month/year.
9. Select a report type from the menu on the right side of the dashboard (beneath **Preview and Export**).
10. Click the dropdown menu beneath **Export Format** to select an export type:
    - XLSX
    - CSV
11. Select **Export** to generate the report.

Scheduling Reports

Use ReQuest Web's reporting feature to schedule recurring reports with detailed order activity, billing information, inventory item statuses, destruction cycles, permanently retrieved inventory, and more.

1. Select **Reports** from the ReQuest Web dashboard header bar.
2. Select the **calendar** icon from the top of the dashboard.
3. Enter a schedule description in the **Enter Your Schedule Description Here** field (e.g. Monthly Detailed Inventory Report).
4. If applicable, select **All Accounts** (or the currently displayed account number) to generate reports per a specific account.
5. A popup window for account selection will open. Under each account level, click the pencil icon to add or remove an account.
6. Enter the account name or number in the search field, and click **Search**.
7. Select the desired account from the search results, and click **Ok**.
8. Click the **X** beside the account number to remove the account.
9. After making the desired changes, select **Apply**.
10. Click **Select Report** to specify the report type, and select the desired report type from the dropdown menu.
11. Click **Export Type** to select the report's export type:
    - XLSX
    - CSV
12. Click the option beside **Month** to select a timeframe for generated reports:
    - Current Month
    - Previous Month
13. Select the desired **delivery method** for the scheduled report:
    - Download from server
    - Email as attachment (maximum size 10MB)
13. Click the option beside **Pattern** to select a frequency for generated reports:
    - Weekly
    - Monthly
13. Select the recurrence start and end dates from the calendar fields beside **Recurrence Start** and **Recurrence End.**

14. Enter a number in the **Recur every weeks** field to determine how often the reports will be delivered (e.g. every 6 weeks).
15. Click the day of the week shown to select the day for report delivery.
16. Click **Save** to schedule the recurring reports. Repeat for as many desired report types as necessary.
17. If you select to download the reports from the server as the delivery method, the number of available reports will appear beside the download icon at the top of the reports dashboard on the selected date.
18. Click the download icon to download the scheduled reports.

ReQuest Web User Preferences

User Account Preferences

Customize your ReQuest Web user account information and preferences by logging into your ReQuest Web user profile settings. You are able to change default customer accounts, addresses, search filters, order preferences, and more.

1. Select the dropdown menu beside the user profile icon  in the upper right corner of the ReQuest Web dashboard.
2. Select **Preferences**.
3. The **Default Information** section is located at the top of the Preferences page. Select **change** beside the default account number to change the default customer account.
4. Enter or change the default phone number for your account in the **My Phone Number** field.
5. Enter or change the default address for the account in the **Default Address** field.
6. You may add up to four additional addresses to your user account. Select **Edit** or **Delete** to change or remove the additional addresses below the default address.
7. Under **Default Search Filters**, toggle  the following options to include or exclude the criteria from your search filters:

   Object Types:

   - Cartons
   - Files
   - Tapes

   Item Statuses:

   - In
   - Pending
   - Out
   - Destroyed
   - Permout
8. Under **Miscellaneous**, toggle  the following miscellaneous user preferences:
   - Enable automatic search by previous barcodes
   - Never Show Images From IOD
   - Scan Entire File in IOD orders
   - Quick Order your Home Page
   - Email order confirmation/cancellation automatically
9. Under **Delivery Preferences**, select from the following options to set a default delivery method:
   - Iron Mountain will deliver items to me
   - I will pick up or view items at Iron Mountain
   - Iron Mountain will ship to me (third party)
   - Image on Demand

10. Click the **Save** button in the lower right corner of the screen to save your user account preferences.

Changing Your Password

Change your ReQuest Web password and basic account information from the user profile settings in your ReQuest web user account.

1. Select the dropdown menu beside the user profile icon  in the upper right corner of the ReQuest Web dashboard.
2. Select **Change Password.**
3. Under the **Password** tab, enter and confirm your new ReQuest Web password. Please note the following password requirements:
    - At least eight characters
    - A Number
    - An Uppercase Letter
    - A Lowercase Letter
    - A Special Symbol
4. Click **Update** to change your password.
5. Select the **Basic Info** tab to change your basic user account information.
6. Your username and default email address is managed by your administrator. You may update the information in the following fields:
    - First Name
    - Last Name
    - Phone Number
7. Click **Update** to save your user account information.

ReQuest Web User Management (For Administrators)

User Management (For Administrators)

Administrators can manage their users through ReQuest Web's User Self-Service application. User management tasks include creating users, deactivating users, editing user accounts, mass importing users, and more. Refer to the following topics to learn how to manage users through ReQuest Web Self-Service.

Creating a User

Please refer to **Manage Roles** in the ReQuest Web User Self-Service header bar for a matrix of user roles and permissions.

1. **Sign in** to ReQuest Web.
2. Select **User Management** from the header toolbar. If prompted, use your ReQuest Web credentials at the login screen.
3. You should be routed to the **ReQuest Web Self-Service** home dashboard. From the right side of the screen, select **Add a new Iron Mountain User** beneath the **Create User** header.
4. Enter the appropriate information in the following fields:
    - First Name
    - Last Name
    - Email Address
5. Select from the following password options:
    - Generate password and send via welcome e-mail
    - Generate password and view on screen
    - I'll type and send the password to the user
6. Enter and verify the password if necessary.
7. Select a language from the **Language** dropdown menu.
8. Select a user status from the **User Status** dropdown menu: **Enabled** or **Disabled**.
9. Click **Next**.
10. On the next page, customize the user's ReQuest Web settings:
    - Security Code
    - Account Access
    - Role
    - IOD (Image on Demand) Access

6. Select the desired settings from each dropdown menu, and click **Assign Instances**.
7. Click **Save** in the upper right corner of the screen to save the user account and user settings.

Deactivating a User

1. **Sign in** to ReQuest Web.
2. Select **User Management** from the header toolbar.
3. If prompted, use your ReQuest Web credentials at the login screen. You will be routed to the **ReQuest Web Self-Service** home dashboard.

4. From the menu on the right side of the dashboard, select **DeActivate User** beneath the **DeActivate User** header.
5. Enter the user's email in the **Email** field.
6. Click the **DeActivate** button to deactivate the user.

Mass Importing Users

The Mass Importing option in ReQuest Web's User Self-Service can be used to create, modify, add, remove, and deactivate users. Download the appropriate spreadsheet template, enter the required information, and upload the completed spreadsheet to mass import users for ReQuest Web.

1. **Sign in** to ReQuest Web and select **User Management** from the header toolbar.
2. If prompted, use your ReQuest Web credentials at the login screen. You will be routed to the ReQuest Web Self-Service home dashboard.
3. From the menu on the right side of the dashboard, select **Download Template** beneath the **Mass Import Users** header.
4. Check the appropriate template and select the **Download** button (click the link beside each template to learn how to complete the required fields before uploading):
    - Create/Modify Users
    - Add/Remove User Accounts
    - Deactivate Users
5. After completing the required fields, save the spreadsheet as a CSV.
6. Return to the ReQuest Web User Self-Service dashboard.
7. From the right side of the screen, select **Upload Template** beneath the **Mass Import Users** header.
8. Check the appropriate template:
    - Create/Modify Users
    - Add/Remove User Accounts
    - Deactivate Users

5. For creating and modifying users, select **Add Accounts** to grant the new users access to ReQuest Web customer account(s).
6. Check the boxes beside the appropriate customer accounts, and click **Save**.
7. Select **Choose File** to upload the completed spreadsheet from your device. Click **Upload**.
8. You will receive an email notification when the Mass Import has been processed.

Searching for a User or Account

1. **Sign in** to ReQuest Web and select **User Management** from the header toolbar.
2. If prompted, use your ReQuest Web credentials at the login screen. You will be routed to the ReQuest Web Self-Service home dashboard.
3. Under the **Find Users** tab located at the top of the dashboard, enter <u>one</u> of the following identifiers in the search bar:
    - First Name
    - Last Name
    - Login ID
    - Email Address
4. Click the **Search** button. Matching search results will display below the search option.
5. Select **Advanced Search** (above the **Search** button) to complete an advanced user search.

This search option allows you to combine user identifiers to further narrow search results.

6. Enter the following information in the appropriate search fields:
   - First Name
   - Last Name
   - Email Address
7. Click the **Search** button. Matching search results will display below the search field.
8. Select the **Find Accounts** tab to search for a customer account.
9. Enter the account name or number and select **Search**. Matching search results will display below the search field.

Modifying a Single User

Please refer to **Searching for a User or Account** to locate a ReQuest Web user for modification. Refer to **Mass Importing Users** to learn how to modify multiple users at once.

1. **Sign in** to ReQuest Web and select **User Management** from the header toolbar.
2. If prompted, use your ReQuest Web credentials at the login screen. You will be routed to the ReQuest Web Self-Service home page.
3. Locate the user you wish to modify by completing a **User Search** under the **Find Users** tab.
4. Select the user from the search result to modify the user. You may also select **Edit** or **Change Email** beneath the **Actions** section.
5. Selecting **Edit** or selecting the user will route you to the user details and settings. Use the dropdown menus to modify the user’s ReQuest Web settings:
   - Security Code
   - Account Access
   - Role
   - IOD (Image on Demand) Access
6. Select the desired settings from each dropdown menu, and click **Assign Instances**
7. Select **Edit User Profile** to complete the following actions:
   - Enable a disabled user
   - Update a user's password
   - Change a user's email
   - Modify all other user account information
8. After making the desired changes, click **Save** in the upper right corner of the screen.

Glossary

A

Account Level One
Customer ID or a unique numeric, alphabetic or alphanumeric identifier, required to access your inventory that is stored with Iron Mountain.

Account Level Three
Department ID or an information management tool that enables the customer to divide the customer account into a logical series of business units under a Division ID (e.g. Pediatrics, Cardiology, Obstetrics).

Account Level Two
Division ID or an information management tool that enables the customer to structure the customer account into a logical series of business units called Divisions (e.g. Outpatient Care, Hospice Care, Ambulatory).

Address and Priority
Service type for delivery orders that are not scheduled or recurring. This type of order may be placed at any time.

Advanced Search
Search option that narrows results through customizable search files, search filters, search terms, search types, and more.

Alias
Metadata field that usually references legacy company data. This information is viewable and searchable, but not maintainable in the application.

Alternate Code
The alternate to an Iron Mountain Barcode: the customer’s alphanumeric identifier used for labeling cartons (or boxes) and files.

B

Basic Search
Simple search option that returns all matching inventory results based on entered keywords or phrases.

C

Cartons
Boxes or containers used to hold files, inventory, or records.

Category Code
Customer’s alphanumeric code that associates inventory with a company’s departmental divisions (e.g. ACCT-15 for Accounting 15, BILL-21 for Billing 21, HR-3355 for Human Resources 3355, etc).

Category Description
Customer’s description that associates inventory with a company’s departmental divisions (e.g. Accounting documents, Billing records, Human Resources contracts, etc).

Charge Account
Customer account that an order is billed to.

Collection Order
Order requesting collection of inventory from a customer’s location for storage at an Iron Mountain facility.

Comment
Order form field directed towards the Iron Mountain employee retrieving the requested carton (or box) or file. Iron Mountain uses any details provided in this field to locate the requested carton or file from storage.

Contact Name
Name of the user placing a ReQuest Web order.

Cost Center
Department or division code that a ReQuest Web order is billed to.

Custom Labels
Customer-assigned metadata labels for User Field 1, 2, 3. When these fields are assigned custom labels, they will display as the customized field (e.g. Contract Title, Case Number, Employee Name, etc) instead of as User Field 1, 2, 3.

D

Delivery Order
Order requesting delivery of inventory (to a customer’s location) that is currently stored with Iron Mountain.

Destroy Date
Date when a stored item is scheduled to be destroyed, based on its retention instructions.

Destroyed
Status of an inventory item (carton or file) after it has been destroyed at the end of its information life cycle.

Destruction Order
Order requesting certified destruction of inventory that has reached the end of its information life cycle.

F

File Identifier
Description of an unregistered file (e.g. file title or color, patient name, case number). Iron Mountain uses this description to locate the requested file from storage.

Files
Individual records or inventory items sotred in cartons.

Filter Search
Search option that narrows results through customizable search filters.

I

Image on Demand (IOD) Order
Order requesting individual files to be converted and delivered to the customer in a digital email format.

In
Inventory status indicating that the item (carton or file) is currently stored at an Iron Mountain facility

Inventory
Assets, cartons (or boxes), documents, files, or records that are stored with Iron Mountain.

Inventory List
ReQuest Web's updated method for saving and loading saved orders.

Iron Mountain Barcode

Unique alphanumeric identifier assigned by Iron Mountain used for labeling cartons (or boxes) and files.

Item Content:
Short description of a container's (carton or box) inventory items (files) (e.g. billing files from 2020, HR files from 2021).

L

Long Description
Extended description of the contents of a carton (or box).

M

Metadata
Inventory details and information used for classification and identification.

O

Out
Inventory status indicating that the item (carton or file) is currently at the customer's location or in transit.

P

Parent Identifier
Description of the carton (or box) containing a file (e.g. alternate code, barcode, carton label, title or color). Iron Mountain uses this description to locate the requested file from storage.

Parent Type
Type of label used to identify the carton (or box) containing a file (an Iron Mountain assigned barcode or an Alternate Code assigned by the customer).

Pending
Status assigned to all new inventory items added to ReQuest Web.

Pending Item
New inventory item added to the ReQuest Web application. All new items are added under a pending status.

Perm Flag
Inventory metadata field indicating the status as permanent or not permanent.

Perm Out Order
Order placed for permanent retrieval of inventory. This may be a delivery order for inventory that is currently in an Iron Mountain storage facility, or an order to retain inventory currently at the customer's location.

Permanent
Method for classifying inventory: all inventory items are classified as either permanent or not permanent.

Permout
Status of an inventory item (carton or file) after it has been permanently withdrawn from Iron Mountain storage.

PO Number
See Purchase Order Number

Previous Barcode
Barcode label for inventory used prior to ReQuest Web.

Purchase Order Number
Alphanumeric order identifier used to search for and track orders.

R

Record Series Code
Alternate to a customer's set destruction date, a record code drives retention policy and calculates the length of time inventory is retained.

Record Series Description
Description of the record code that drives retention policy (HR retention policy, billing retention policy, etc).

Registered Item
Inventory that has been previously identified, assigned barcodes, and retrieved from an Iron Mountain storage facility.

Requested By
Order form field for internal, customer use to identify the requestor if the order is placed on behalf of another individual.

Role
Defines the level of access and permissions for a user. Users are created on a scale of 0 to 9 (e.g. webuser0, webuser1, webuser, 2, etc.), with zero allowing the least amount of access and permissions and nine allowing the most.

Routine
Describes a lower priority type for delivery and IOD orders.

S

Scheduled
Service type for recurring delivery orders. This type of order is scheduled on a routine basis, and may vary depending on your service level agreement.

Security Code
Defines the level of security granted to a user when a user is created or modified.

Sequence
Customer-assigned alphanumeric sequence by which inventory is classified (e.g. Box 6-10 Carton 1-12, etc).

Set
Customer-assigned alphanumeric identifier for classifying inventory as part of a set (e.g. Contracts1, BillingFiles24, etc).

Short Description
Description of the inventory, such as a carton (or box) or file, by color, size, etc.

Special Instructions
Order form field directed to driver and delivery instructions.

Status
Describes the status or location of inventory: In, Pending, Out, Permout, Destroyed.

Supplies
Cartons (or boxes), barcode labels, and security seals and tape used for transporting, classifying, and storing inventory.

Supply Order
Order requesting delivery of supplies (cartons, carton barcode labels, file barcode labels, etc) to a customer's location.

T

Type
Search filter term referring to the type of inventory: a carton (box) or file.

U

UDD
See User-Defined Date

Unitemized Order
Quick, pickup order of inventory that is not yet registered in Iron Mountain's system.

Unregistered
Status of an inventory item that has not previously been assigned Iron Mountain barcodes or retrieved from an Iron Mountain storage facility.

Unregistered Order
Order requesting retrieval of inventory that has not previously been assigned Iron Mountain barcodes or been retrieved from an Iron Mountain storage facility.

Urgent
Describes a higher priority type for orders.

User Fields
Metadata fields for user-defined inventory descriptions and identifiers.

User-Defined Date
Customer-assigned method for describing and identifying inventory by dates.

W

Wild Card
Advanced search method that uses the asterisk symbol to return results on partial terms.

WO Image
See Work Order Image

Work Order Code
Order confirmation number.

Work Order Image
Image included in IOD orders.

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