Iron Mountain Requesting Reports

IMPORTANT POINTS:

- Facilities on contract to use Iron Mountain long term off-site storage & retrieval system will have access to the Iron Mountain Connect Portal.
- There are four different report categories within the Iron Mountain Connect Portal - Activity, Inventory, Retention and Financial. Refer to this link for clarification in the *Reporting* section https://www.ironmountain.com/support/iron-mountain-records-connect/imcrm-howtos.
- The Iron Mountain Account Manager will provide user names and passwords. A user will be assigned the right to access reports at the discretion of the site/program manager.

PROCEDURE:

1. Log onto Iron Mountain and scroll to the report section.
2. **Report Category -** Select one of the four categories listed in the drop down.
3. **Select a Service Area** – Report Centre.
4. **Select a Report –** Select a report from the list of available reports applicable to the report category.
5. **Customer** – Defaults to Southern Health-Santé Sud
6. **Division ID –** Select appropriate facility or departmental location from drop down.
7. **Department ID -** Select appropriate accounting number and program.
8. Type a date in the From/To boxes or utilize the calendar icon.
9. Select any other criteria applicable to the report requested.
10. **Report Format –** select report format.
11. **Click** 'Submit'.
12. Reports may take up to three hours to generate. Return to the Report Center at a later time to retrieve your report.
13. Reports are available in the Report Center for up to 30 days. There is the option to repeat the report in a specific time-frame. To retain a report longer, save it to a local or network drive on your computer.