

Policy Center Essential Edition

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Essential Edition

Iron Mountain's Policy Center Solution (PCS) is a web-based solution for developing, managing and distributing your retention policy. It is also the client delivery mechanism for IM's Global Research Service. Policy Center supports an ISO 15489 retention management program by allowing users to build a retention schedule and distribute that retention schedule electronically to business users and other applications.

Essential Edition is a service that offers a ready-made record retention schedule and simple to use web-based software. The retention schedule includes record classes and retention suggestions for areas of business within a jurisdiction. Additionally, they are updated periodically.

The IM ready-made retention schedule is a reference standard that incorporates a two-level taxonomy organized by business functions and corresponding record classes. They represent corporate business functions that are common across industries.

Essential Edition includes curated Citations which highlight laws within jurisdictions that support and justify the Record Class. The Retention Schedule includes record classes and annually updated retention requirements for business areas by jurisdiction.

Getting Started with the Retention Schedule

The **Retention Schedule** is a two-level taxonomy structure, with the parent level being business functions and the child level being record classes.

About Records Classification



The **Records Classification** is organized by a list of **Business Functions** that serve as the first point of organization in Policy Center. Selecting a business function allows you to view additional information in an ordered format.

Viewing Business Functions

1. Click on the business function name to view details on the right pane.
2. The folder icon on the right contains the count of the child Record Classes.
3. Select the scroll bar in the right view panel or use the shortcuts underneath the header bar on the top right (Record Class, Retention, Citations) for a complete view of the right panel information.
4. Click and drag the scroll bar to adjust the view area for the right panel; to the left to increase view size or to the right to decrease view size.


Sorting Business Functions

Business Functions are sorted alphabetically by Code.


Click  above the **Code** column to sort by reverse alphabetical order. Click  to return to regular alphabetical order.

Favorites

Choosing Favorite **Business Functions** or **Record Classes**


1. Find the **Business Function** and/or **Record Class** you want to mark as a Favorite.
2. Click  **Favorite** to mark as a Favorite.
3. Click **Favorites** to display a list of all **Business Functions** and **Record Classes** marked as a Favorite.
4. Select **All** to view the full Retention Schedule.

Removing Favorite Folder Status:

Find the **Business Function** and/or **Record Class** you no longer want as a Favorite, then click  **Favorite** to unmark as a Favorite.

Lines Per Page

You can configure how many lines display per page:

1. Click  **Expand** to view how many lines per page to display, such as 25, 50 and 75.
2. Select an amount to change how many lines per page display.

About Record Classes

A record class is a grouping of records, record types, or record examples (as Iron Mountain refers to them) that share a common retention rule.

The list of Record Classes is alphabetical and displays the code and name, and associated retention rule and citation counts.

Viewing a Record Class

Click **> Expand** to the left of the Record Class folder icon in the default view to display the **Jurisdiction**, **Retention Rule** and **Trigger**.

Sorting Record Classes

Record Classes are sorted by **Code**.

Click **↑** above the **Code** column to sort by reverse alphabetical order. Click **↓** to sort back to regular alphabetical order.

Record Class Folder Favorites

Choosing Favorite Record Classes

1. Find the Record Class you want to mark as a favorite.
2. Click **☆** to color in the icon: **★**.

Removing Favorite Record Classes

1. Find the Record Class you no longer want as a favorite.
2. Click **★** to remove the shading in the icon: **☆**.

Viewing Record Class Details

Select a Record Class to view its details in the right pane.

- Code
- Name
- Full Description
- Record Examples
- Metadata
 - Format
 - Notes
 - Iron Mountain Inventory Short Name
- Ownership Information
 - Stewardship
 - Last Updated By
 - Date Last Updated
 - Retired


Choose **Retention** in the top menu to view Details: **Jurisdiction**, **Rule**, and **Trigger**.

Select the Rule to display its Details in a pop up window:

- Code
- Rule Name
- Jurisdiction
- Rule Type
- Retention Trigger
- Trigger Code
- Iron Mountain Boxes Eligible for Destruction After
- Min Period Description
- Min Period
- Max Period Description
- Max Period

Keyword Search

Keyword Search helps you quickly find information in the Retention Schedule. Just type in specific words to see results that include those words. For example, searching the keyword *resume* returns highlighted search results within two record classes, **Personnel Records** and **Employee Recruitment and Selection**. This makes it very easy for your employees to quickly locate retention information for the records they maintain.

1. Enter a keyword or phrase up to 50 alphanumeric in length into the search entry field in the right corner of the Retention Schedule screen.
2. Press **Enter** or click the the search icon .
3. Folders containing highlighted matches are listed on screen.

Signing Out

1. Click **Log Out** found in the right corner, or return to the Iron Mountain Connect homepage by clicking the Iron Mountain Connect tab and choose **Logout** in the right corner.

About This Help File

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Contacting Support

You can request application support and report issues by calling:

- In the US, email us at askcustomerservice@ironmountain.com or call **1-800-934-3453**.
- In Canada, email us at askcustomerservice@ironmountain.com or call **1-800-327-8345**.