Iron Mountain Integration

Gimmal Physical

Contents

Version History

Version	Approved By	Effective Date	Product Version	Description of Change
1	Terry Butler	2/14/2022	3.11	Created for Gimmal Version 3.11
2	Marta Farensbach	12/1/2022	3.12	Minor updates for Gimmal Physical 3.12

Overview

The document covers the Gimmal Physical Iron Mountain integration.

- Iron Mountain integration can only be linked to Boxes and/or Files to process order files (.ord).
- Open shelving orders are not supported.
- When requests are sent to Iron Mountain, items are automatically transferred in Gimmal Physical to the destination of the request.
- The integration does not support maintenance files (.mnt) to update metadata in SKP.
- The integration does not consume the nightly files Iron Mountain posts on the SFTP site every 24 hours which indicate request status.

Features

Request Delivery (Retrieval) of Boxes and Files

The following options are available in the Gimmal Physical application.

- Request Type
  - Normal
  - Photocopy
  - Fax & Deliver
  - Fax & Refile
- Delivery Priority
  - Normal
  - Half Day
  - Rush
- Order Type
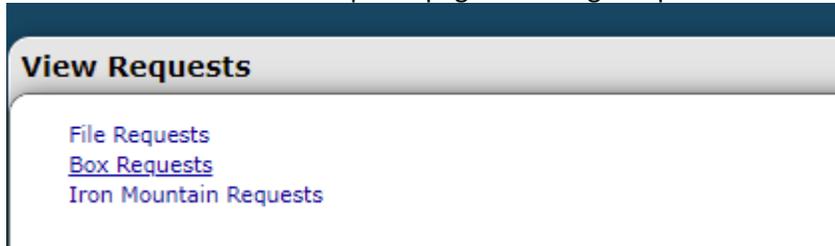 - Standard Delivery
  - Permanent Withdrawal

Request Pickup of Boxes and Files

The following options are available in the Gimmal Physical application.

- Delivery Priority
  - Normal
  - Half Day
  - Rush

Manage Iron Mountain Requests

There is an Iron Mountain Requests page to manage requests for items going to or coming from Iron Mountain.

The view request page enables the submission of requests to the FTP site that Iron Mountain monitors.

	Item Description	Item Barcode	Status	Current Location	Requestor	Request Date	Destination	On Waitlist	Request Type	Delivery Priority	Order Type	Delivery/Pick Up Date
☐	Box - 0000000202	0000000202	Approved	Iron Mountain	Super User	2/3/2022 3:23:28 PM	Joe User	No	Normal	Normal	Standard Delivery	2/4/2022

Settings

Iron Mountain account information must be entered in the Gimmal Physical Application Settings page.

- The path to the folder on the sftp site associated with Iron Mountain.
- The Username for the sftp site associated with Iron Mountain.
- The password for the sftp site associated with Iron Mountain.

The path to the folder on the ftp site associated with Iron Mountain	sftp://ftp.imlink.ironmountain.com/toplus/
The Username for the ftp site associated with Iron Mountain	gimmal
The password for the ftp site associated with Iron Mountain	••••••••••••

Preferences

A preference setting is available to enter an email address that will receive notifications when orders are submitted to Iron Mountain

Preference Category 'Iron Mountain'

Scope	Description	Value
System	The email address associated with Iron Mountain requests	Gimmal@Gimmal.com

Setup

A location record must be designated as an Iron Mountain location by checking the checkbox "Is Iron Mountain Location" for a given record. Multiple Iron Mountain locations are supported.

Transit Information will also need to be entered for any location that is an Iron Mountain location and for any User that will be either requesting pickup or deliver to or from Iron Mountain.

Custom record(s) will need to be created that contain the Custom ID and District ID assigned by Iron Mountain. Additionally, address information and contact name can be entered.

Box records will need to have a current location, an IM Box Size value, a Customer ID and a District ID before they can be requested for pickup or delivery.

File records will need to have a current location, a Customer ID and a District ID before they can be requested for pickup or delivery.

If records are updated in such a way that make them invalid for Iron Mountain request after a successful request has been made but before they have been submitted to Iron Mountain errors will be displayed on the view requests page. Items in error will be back colored in yellow. The issue for a given record can be seen by mousing over the item description hyperlink.

For request pickups the destination will need to be set to an Iron Mountain location.

File Creation

When requests are submitted to the Iron Mountain sftp site a files with a .ord extension for pickups or deliveries and .add extension for additions are created and posted to the Iron Mountain site. Data to create these files is constructed using the following:

Pickup or delivery files (.ord) – Header Information

Gimmal Physical Source	Iron Mountain Reference
Customer ID (On Customer tab)	CustID
District ID (On Customer tab)	DistID
Address Information (Transit Information tab). If Ship To Code is present it is used in lieu of address information	Ship to address information

Pickup or delivery files (.add) – column mapping for Boxes.
Note: For the most part these fields can be empty as this data is now be captured and managed in Gimmal Physical.

Gimmal Physical Source	Iron Mountain Reference
Customer ID	CustomerNumber
Box Number (if empty then Barcode will be used)	SkpBoxNumber
Barcode	CustomerBoxNumber
Department ID	DepartmentId
Record Code	RecordCode
Date From	FromDate
Date To	ToDate
Major Description	MajorDescription
Minor Description	MinorDescription
Scheduled Destruction Date	DestructionDate
Destruction Indicator (defaults to U)	DestructionIndicator
Long Description 1	LongDescription1
Long Description 2	LongDescription2
Long Description 3	LongDescription3
Long Description 4	LongDescription4
Long Description 5	LongDescription5
Long Description 6	LongDescription6
Long Description 7	LongDescription7

Long Description 8	LongDescription8
Extra 1	Extra1
Extra 2	Extra2
Division ID	DivisionId
Create Date (the boxes create date)	CreateDate
Event Date	EventDate
Reference 1	Reference1
Box Hold Code	BoxHoldCode

Pickup or delivery files (.add) – Item Information (Files)

Gimmal Physical Source	Iron Mountain Reference
Customer ID	CustomerNumber
Box Number (if empty then Barcode will be used)	SkpBoxNumber
Barcode	CustomerBoxNumber
Department ID	DepartmentId
Record Code	RecordCode
Date From	FromDate
Date To	ToDate
File Desc 1	FileDescription1
File Desc 2	FileDescription2
Extra 1	Extra1
Extra 2	Extra2
Third Party ID	ThirdPartyId
Division ID	DivisionId
File Description 3	FileDescription3
File Description 4	FileDescription4
Create Date (the files create date)	CreateDate
Birth Date	BirthDate
Discharge Date	DischargeDate
Social Security Number	SocialSecurityNumber
Volume Number	VolumeNumber
Unique Barcode	UniqueBarcode
Customer Barcode	CustBarcode
File Description 5	FileDescription5
File Description 6	FileDescription6
File Description 7	FileDescription7
File Description 8	FileDescription8
File Description 9	FileDescription9
Type	Type

Configuration

A Customer tab is added to the database when the Iron Mountain configuration is turned on. This tab should either appear as a list on the Organization tab or the Box and File tab. If Customer is added to the Organization tab, the customer field will need to be included as an output field on the Box and/or File tabs being passed down through Organization.

The manage list functionality is also altered when the Iron Mountain Integration is turned on. The Box Size list requires a value to be entered in the IM Size column. By default, the three list values 1,2 and 3 will have the IM Box Size values of 1.20, 2.40 and 3.60 respectively. In addition, the list values for Iron Mountain Department and Iron Mountain Division will have additional columns to hold the Department ID and the Division ID respectively. The Department ID and Division ID values will come from the client if they are storing this information with Iron Mountain.

A location record must be designated as an Iron Mountain location by checking the checkbox "Is Iron Mountain Location" for a given record. Multiple Iron Mountain locations are supported. Transit Information will also need to be entered for any location that is an Iron Mountain location.