Managing Organization Groups

IRON MOUNTAIN CONNECT™

IRON MOUNTAIN

US-RM-INT-PPT-12.19.2016

Organization Groups

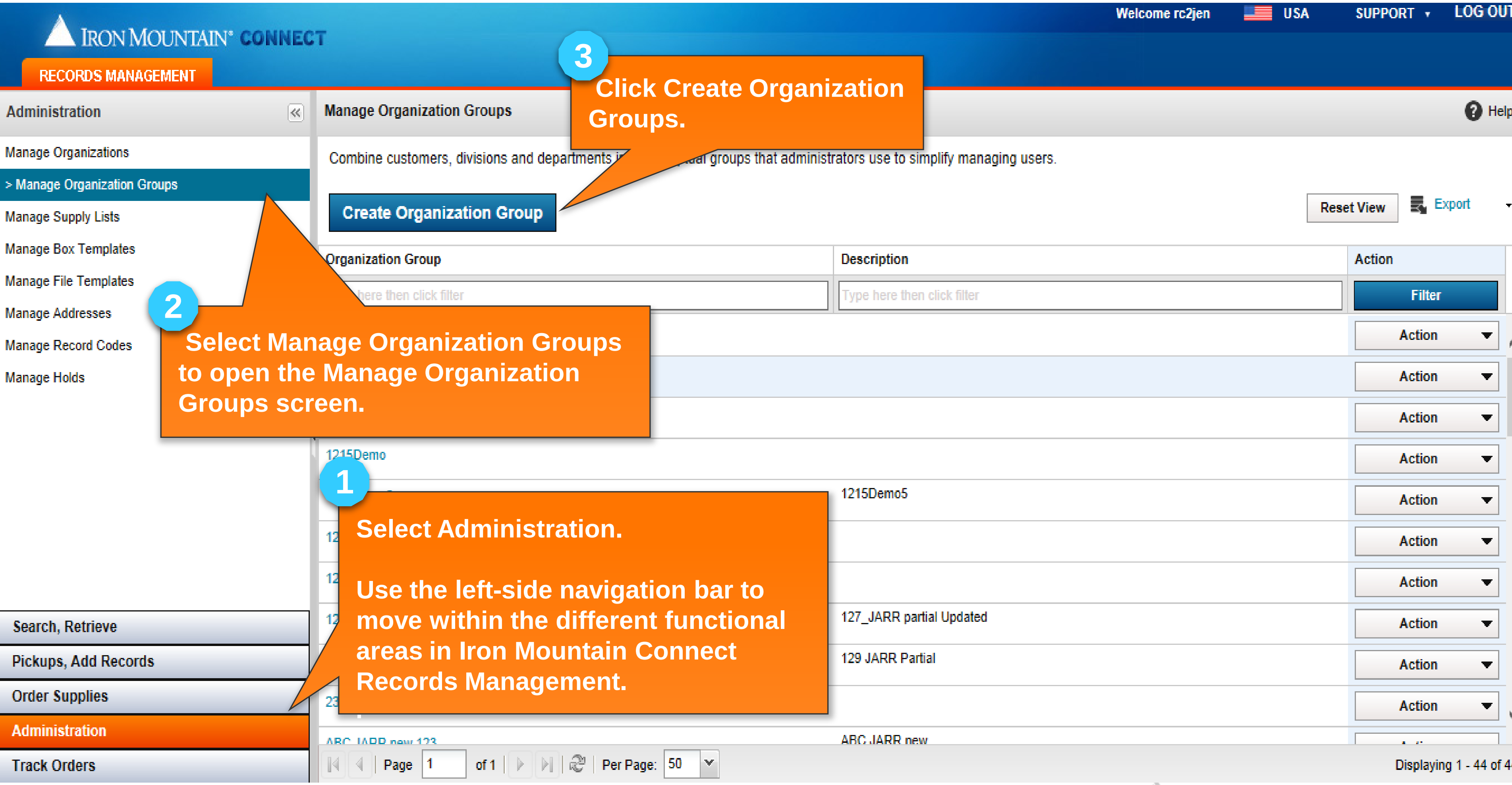
Organization groups enable system administrators to combine customers, divisions and departments into conceptual groups that simplify the process of managing users.

System administrators create organization groups from within Iron Mountain Connect Records Management, and then create and assign both standard users and organization group administrators to the organization group from within the Manage Users selection on the Iron Mountain Connect homepage.

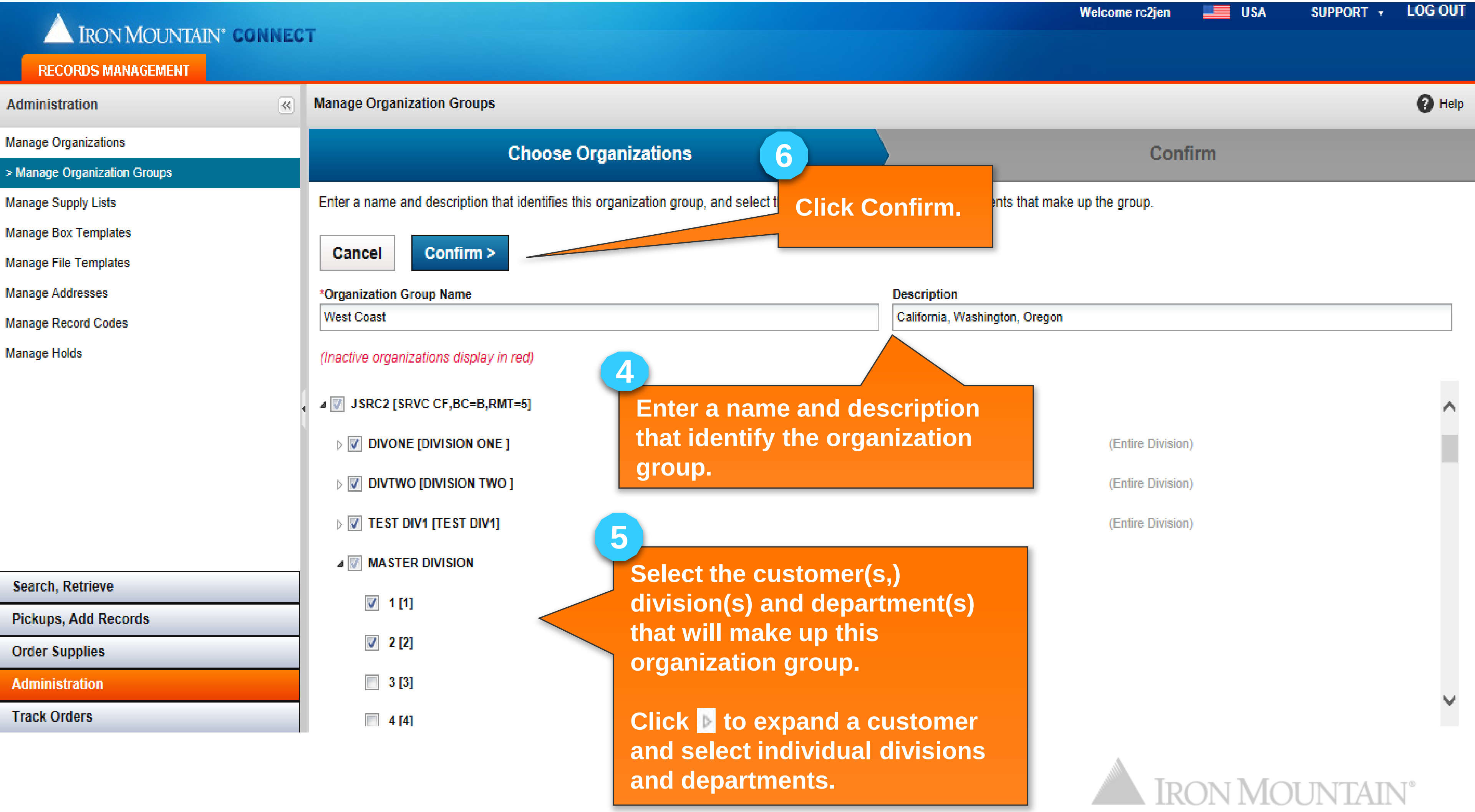
Use this guide to learn how to:

- Create an organization group
- View and edit an organization group
- Remove an organization group
- Add new and existing users to an organization group in different roles

Creating an Organization Group

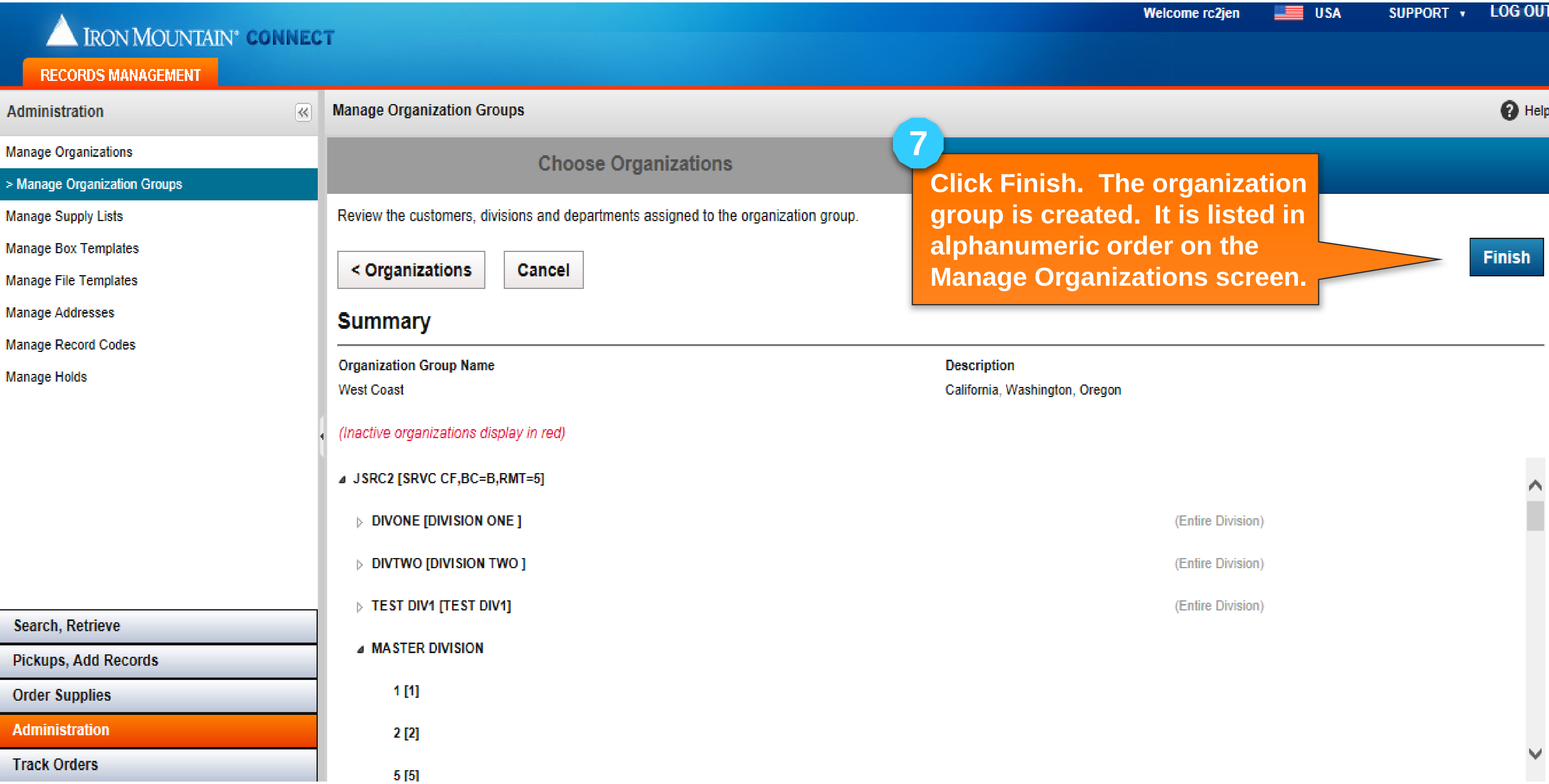


Creating an Organization Group

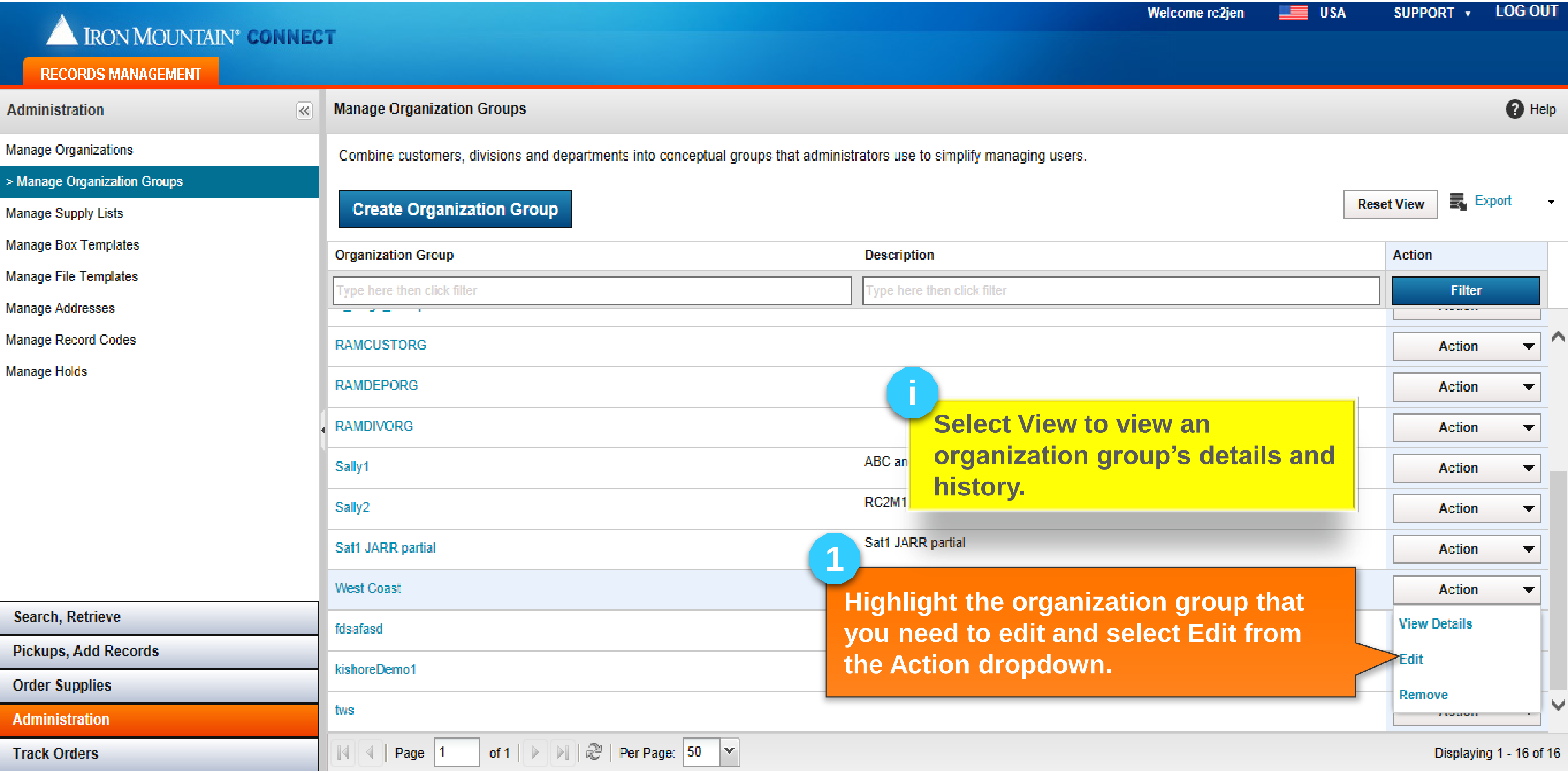


IRON MOUNTAIN®

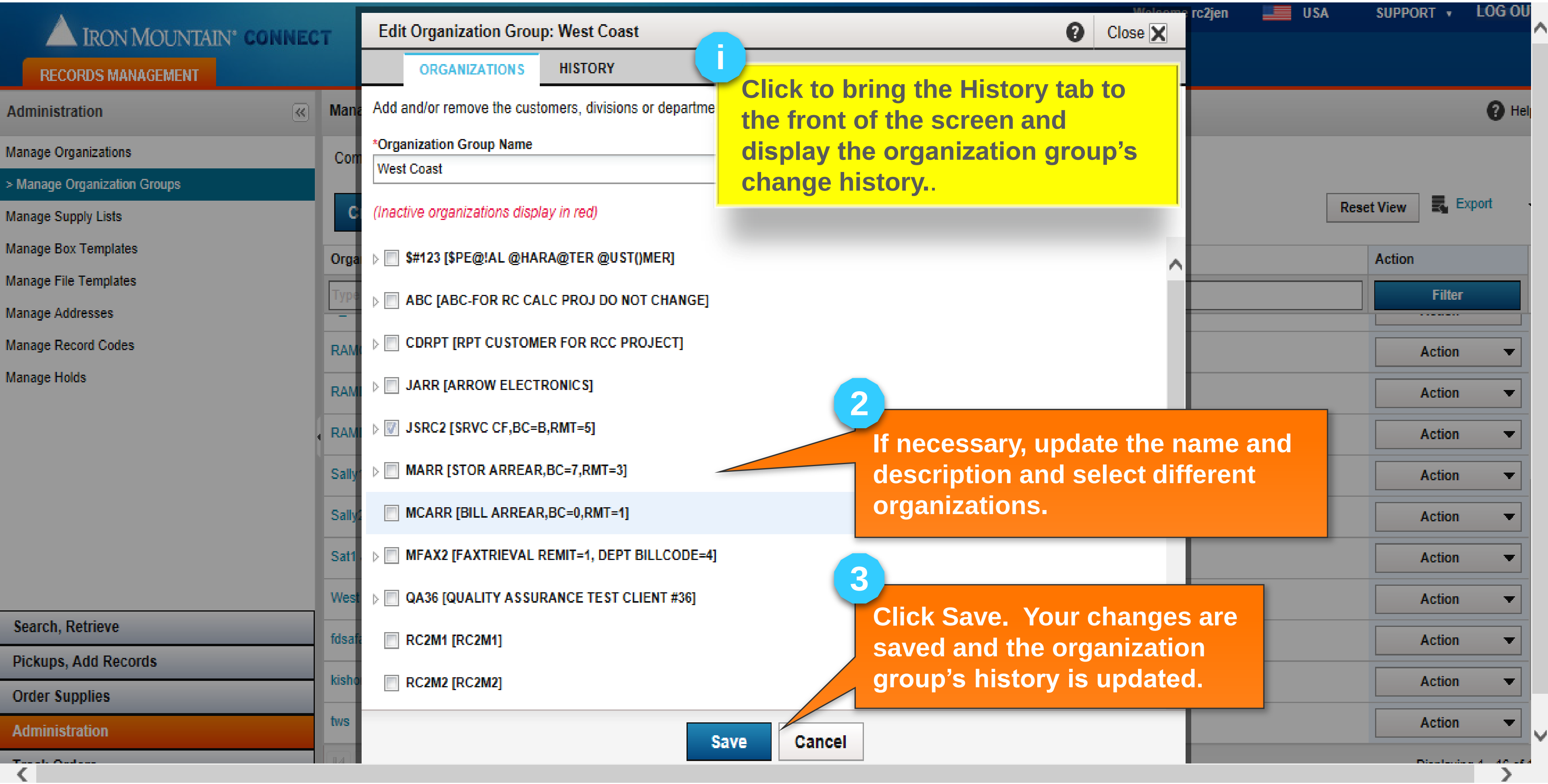
Creating an Organization Group



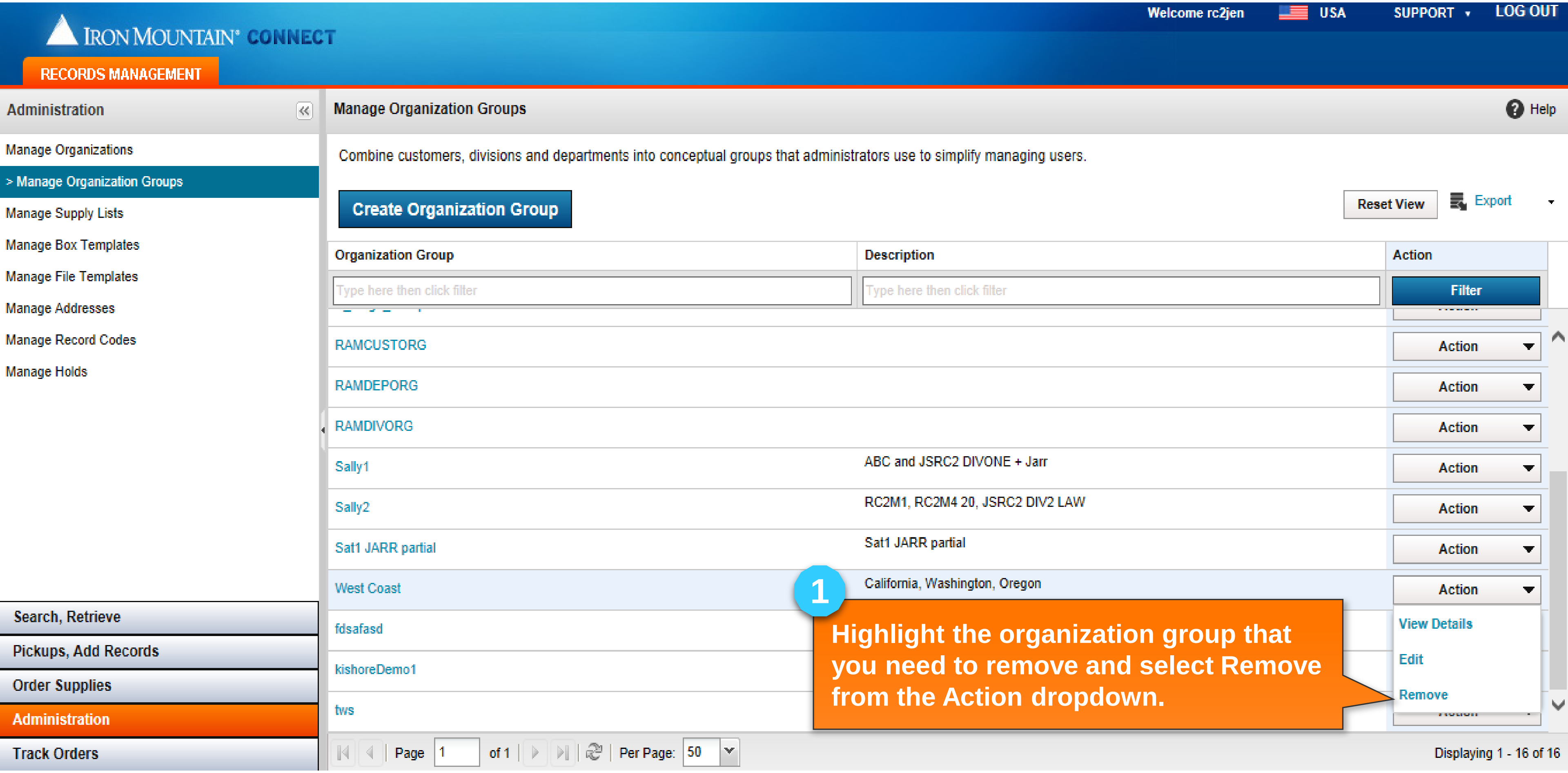
Editing an Organization Group



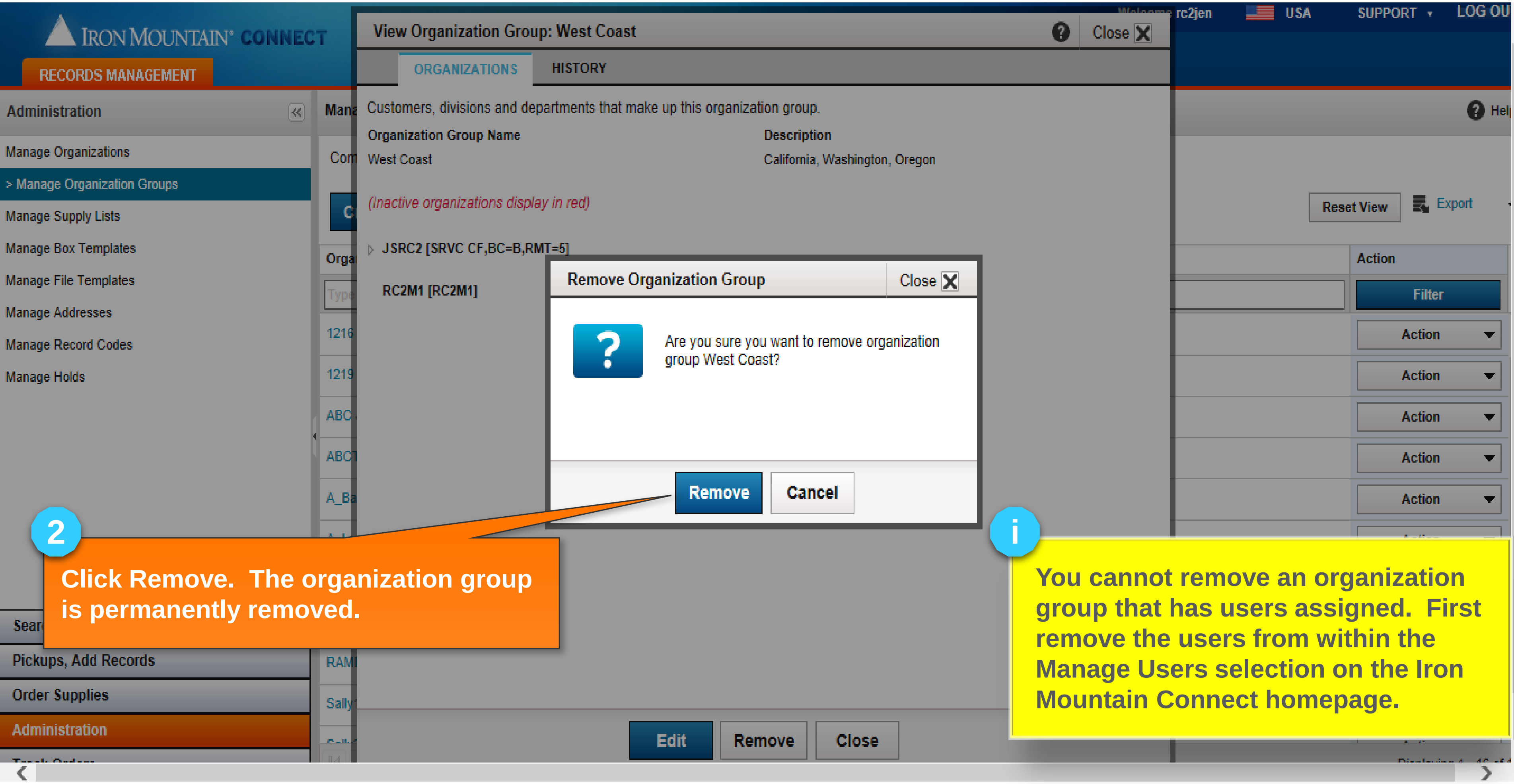
Editing an Organization Group



Removing an Organization Group



Removing an Organization Group



2

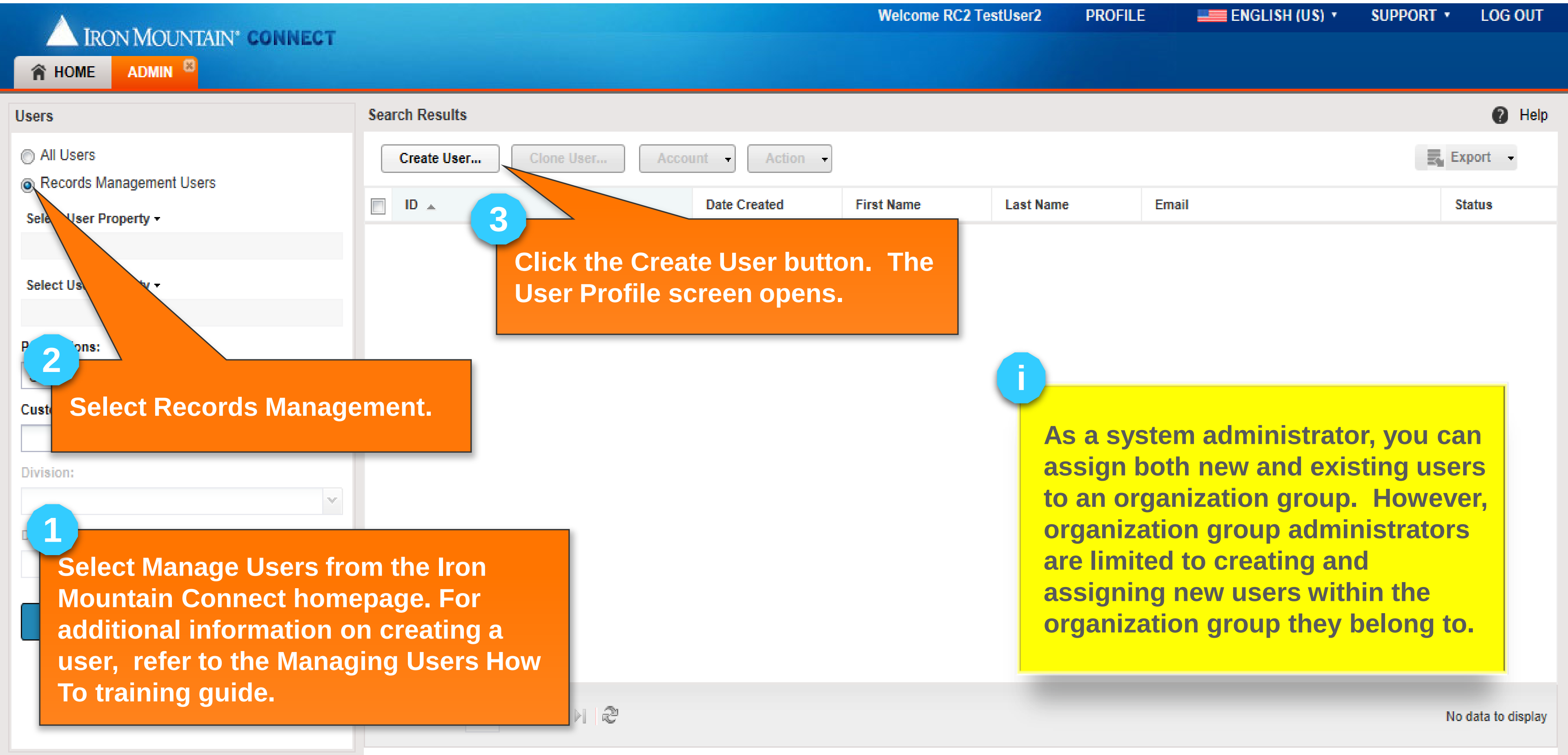
Click Remove. The organization group is permanently removed.

i

You cannot remove an organization group that has users assigned. First remove the users from within the Manage Users selection on the Iron Mountain Connect homepage.

IRON MOUNTAIN

Assigning a User to an Organization Group



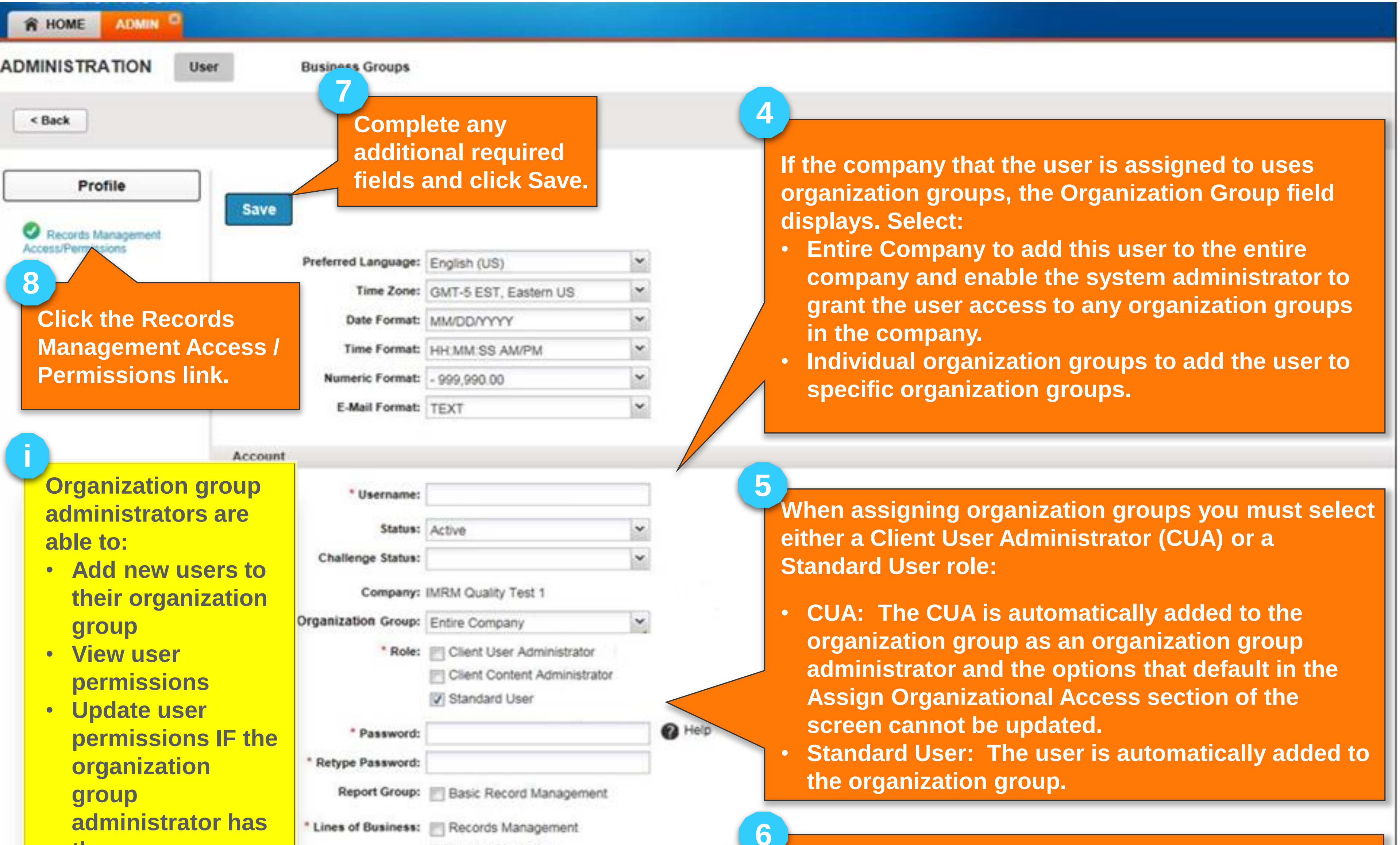
1 Select Manage Users from the Iron Mountain Connect homepage. For additional information on creating a user, refer to the Managing Users How To training guide.

2 Select Records Management.

3 Click the Create User button. The User Profile screen opens.

i As a system administrator, you can assign both new and existing users to an organization group. However, organization group administrators are limited to creating and assigning new users within the organization group they belong to.

Assigning a User to an Organization Group



4 If the company that the user is assigned to uses organization groups, the Organization Group field displays. Select:

- Entire Company to add this user to the entire company and enable the system administrator to grant the user access to any organization groups in the company.
- Individual organization groups to add the user to specific organization groups.

5 When assigning organization groups you must select either a Client User Administrator (CUA) or a Standard User role:

- CUA: The CUA is automatically added to the organization group as an organization group administrator and the options that default in the Assign Organizational Access section of the screen cannot be updated.
- Standard User: The user is automatically added to the organization group.

6

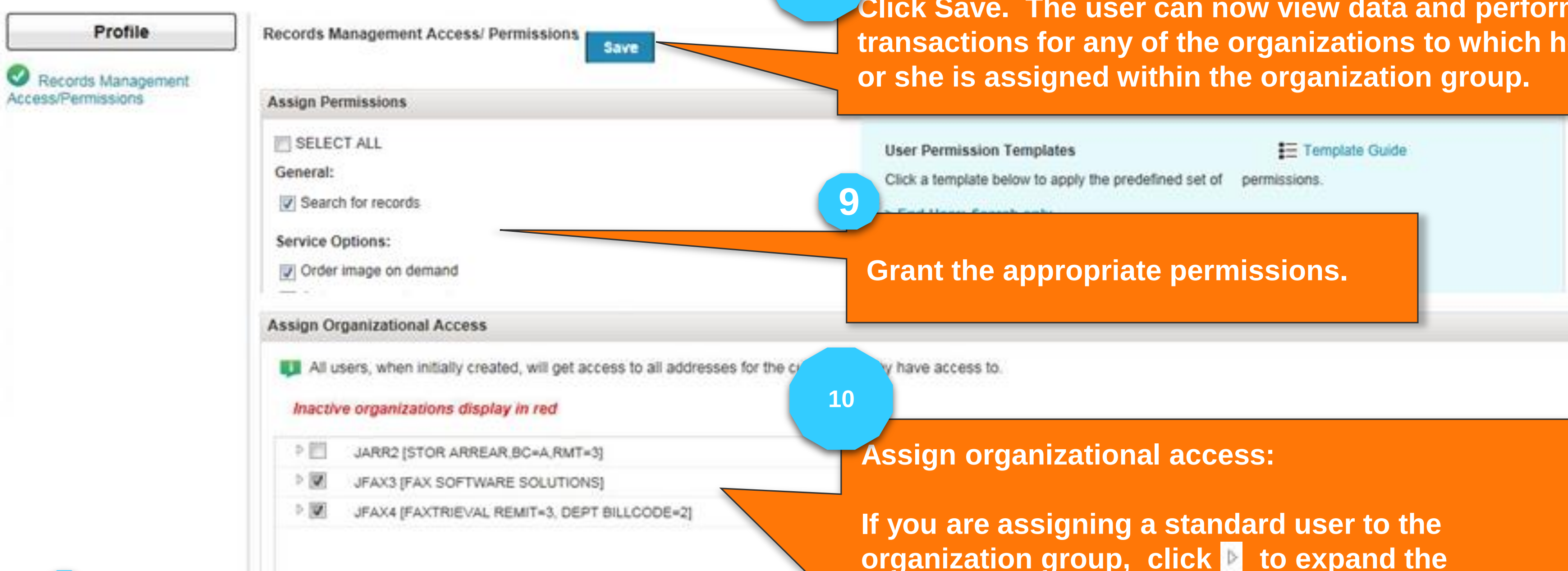
7 Complete any additional required fields and click Save.

8 Click the Records Management Access / Permissions link.

i Organization group administrators are able to:

- Add new users to their organization group
- View user permissions
- Update user permissions IF the organization group administrator has

Assigning a User to an Organization Group



11

Click Save. The user can now view data and perform transactions for any of the organizations to which he or she is assigned within the organization group.

9

Grant the appropriate permissions.

10

Assign organizational access:

If you are assigning a standard user to the organization group, click ▷ to expand the organization and select/deselect individual customers, divisions and departments.

If you are assigning an organization group administrator (a Client User Administrator with an organization group), all organizations within that organization group are completely selected and cannot be updated.

i

If you set up an organization group administrator with fewer permissions than a standard user in the organizational group that he or she oversees, the organization group administrator will be able to view the standard user's permissions but will not be able to update them.

IRON MOUNTAIN®