
Managing Organization Groups

IRON MOUNTAIN CONNECT™



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

The screenshot shows the Iron Mountain Connect interface. At the top, there is a navigation bar with the logo, user name 'Welcome rc2jen', location 'USA', and links for 'SUPPORT' and 'LOG OUT'. Below this is a 'RECORDS MANAGEMENT' tab. The left sidebar contains a list of navigation items: Administration, Manage Organizations, Manage Supply Lists, Manage Box Templates, Manage File Templates, Manage Addresses, Manage Record Codes, and Manage Holds. The 'Administration' item is highlighted in orange. The main content area is titled 'Manage Organization Groups' and contains a 'Create Organization Group' button. Below this is a table with columns for 'Organization Group', 'Description', and 'Action'. The table lists several organization groups, including '1215Demo', '1215Demo5', '127_JARR partial Updated', '129 JARR Partial', and 'ARC JARR new 123'. Three callouts are present: 1. A callout pointing to the 'Administration' item in the sidebar, with the text 'Select Administration. Use the left-side navigation bar to move within the different functional areas in Iron Mountain Connect Records Management.' 2. A callout pointing to the '> Manage Organization Groups' link in the sidebar, with the text 'Select Manage Organization Groups to open the Manage Organization Groups screen.' 3. A callout pointing to the 'Create Organization Group' button, with the text 'Click Create Organization Groups.'

Creating an Organization Group

Administration Manage Organization Groups

Manage Organizations

> Manage Organization Groups

Manage Supply Lists

Manage Box Templates

Manage File Templates

Manage Addresses

Manage Record Codes

Manage Holds

Search, Retrieve

Pickups, Add Records

Order Supplies

Administration

Track Orders

Choose Organizations

Confirm

Enter a name and description that identifies this organization group, and select the divisions and departments that make up the group.

6 Click Confirm.

*Organization Group Name Description

West Coast California, Washington, Oregon

(Inactive organizations display in red)

- JSRC2 [SRVC CF,BC=B,RMT=5]
 - DIVONE [DIVISION ONE] (Entire Division)
 - DIVTWO [DIVISION TWO] (Entire Division)
 - TEST DIV1 [TEST DIV1] (Entire Division)
- MASTER DIVISION
 - 1 [1]
 - 2 [2]
 - 3 [3]
 - 4 [4]

4 Enter a name and description that identify the organization group.

5 Select the customer(s), division(s) and department(s) that will make up this organization group.

Click to expand a customer and select individual divisions and departments.

Creating an Organization Group

- Administration
- Manage Organizations
 - > Manage Organization Groups
 - Manage Supply Lists
 - Manage Box Templates
 - Manage File Templates
 - Manage Addresses
 - Manage Record Codes
 - Manage Holds
- Search, Retrieve
- Pickups, Add Records
- Order Supplies
- Administration
- Track Orders

Manage Organization Groups

Help

Choose Organizations

Review the customers, divisions and departments assigned to the organization group.

< Organizations Cancel

7 Click Finish. The organization group is created. It is listed in alphanumeric order on the Manage Organizations screen.

Finish

Summary

Organization Group Name	Description
West Coast	California, Washington, Oregon

(Inactive organizations display in red)

- ▲ JSRC2 [SRVC CF,BC=B,RMT=5]
 - ▷ DIVONE [DIVISION ONE] (Entire Division)
 - ▷ DIVTWO [DIVISION TWO] (Entire Division)
 - ▷ TEST DIV1 [TEST DIV1] (Entire Division)
- ▲ MASTER DIVISION
 - 1 [1]
 - 2 [2]
 - 5 [5]

Editing an Organization Group

IRON MOUNTAIN® CONNECT

RECORDS MANAGEMENT

Welcome rc2jen USA SUPPORT LOG OUT

Administration << Manage Organization Groups ? Help

Combine customers, divisions and departments into conceptual groups that administrators use to simplify managing users.

Create Organization Group

Reset View Export

Organization Group	Description	Action
Type here then click filter	Type here then click filter	Filter
RAMCUSTORG		Action
RAMDEPORG		Action
RAMDIVORG		Action
Sally1	ABC an	Action
Sally2	RC2M1	Action
Sat1 JARR partial	Sat1 JARR partial	Action
West Coast		Action
fdsafasd		View Details
kishoreDemo1		Edit
tws		Remove

Search, Retrieve

Pickups, Add Records

Order Supplies

Administration

Track Orders

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1 Select View to view an organization group's details and history.

1 Highlight the organization group that you need to edit and select Edit from the Action dropdown.

Editing an Organization Group

1 Click to bring the History tab to the front of the screen and display the organization group's change history..

2 If necessary, update the name and description and select different organizations.

3 Click Save. Your changes are saved and the organization group's history is updated.

Organization	Selected
▶ <input type="checkbox"/> \$#123 [SPE@!AL @HARA@TER @UST()MER]	
▶ <input type="checkbox"/> ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]	
▶ <input type="checkbox"/> CDRPT [RPT CUSTOMER FOR RCC PROJECT]	
▶ <input type="checkbox"/> JARR [ARROW ELECTRONICS]	
▶ <input checked="" type="checkbox"/> JSRC2 [SRVC CF,BC=B,RMT=5]	
▶ <input type="checkbox"/> MARR [STOR ARREAR,BC=7,RMT=3]	
▶ <input type="checkbox"/> MCARR [BILL ARREAR,BC=0,RMT=1]	
▶ <input type="checkbox"/> MFAX2 [FAXTRIEVAL REMIT=1, DEPT BILLCODE=4]	
▶ <input type="checkbox"/> QA36 [QUALITY ASSURANCE TEST CLIENT #36]	
▶ <input type="checkbox"/> RC2M1 [RC2M1]	
▶ <input type="checkbox"/> RC2M2 [RC2M2]	

Removing an Organization Group

IRON MOUNTAIN® CONNECT

RECORDS MANAGEMENT

Welcome rc2jen USA SUPPORT LOG OUT

Administration Manage Organization Groups

Combine customers, divisions and departments into conceptual groups that administrators use to simplify managing users.

Create Organization Group

Reset View Export

Organization Group	Description	Action
Type here then click filter	Type here then click filter	Filter
RAMCUSTORG		Action
RAMDEPORG		Action
RAMDIVORG		Action
Sally1	ABC and JSRC2 DIVONE + Jarr	Action
Sally2	RC2M1, RC2M4 20, JSRC2 DIV2 LAW	Action
Sat1 JARR partial	Sat1 JARR partial	Action
West Coast	California, Washington, Oregon	Action
fdsafasd		View Details
kishoreDemo1		Edit
tws		Remove

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1 Highlight the organization group that you need to remove and select Remove from the Action dropdown.

Removing an Organization Group

The screenshot displays the Iron Mountain Connect interface. The main window is titled "View Organization Group: West Coast" and shows a list of organization groups. A modal dialog box titled "Remove Organization Group" is open, asking "Are you sure you want to remove organization group West Coast?". The dialog has "Remove" and "Cancel" buttons. An orange callout box with a "2" icon points to the "Remove" button, stating: "Click Remove. The organization group is permanently removed." A yellow callout box with an "i" icon points to the dialog, stating: "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." The background interface includes a sidebar with "Administration" and "Manage Organization Groups" options, and a main content area with a table of organization groups.

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.

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.

Users

Search Results

Create User... Clone User... Account Action

ID	Date Created	First Name	Last Name	Email	Status
No data to display					

Assigning a User to an Organization Group

The screenshot shows a web application interface for user administration. At the top, there are navigation links for 'HOME' and 'ADMIN'. Below that, the main navigation bar includes 'ADMINISTRATION', 'User', and 'Business Groups'. A '< Back' button is visible on the left. The 'Profile' section is active, showing a 'Save' button. A 'Records Management Access/Permissions' link is highlighted with a green checkmark. The 'Account' section contains several form fields: 'Preferred Language' (English (US)), 'Time Zone' (GMT-5 EST, Eastern US), 'Date Format' (MM/DD/YYYY), 'Time Format' (HH.MM.SS AM/PM), 'Numeric Format' (- 999,990.00), and 'E-Mail Format' (TEXT). The 'Organization Group' section includes a 'Company' dropdown (IMRM Quality Test 1), an 'Organization Group' dropdown (Entire Company), and a 'Role' section with radio buttons for 'Client User Administrator', 'Client Content Administrator', and 'Standard User' (which is selected). There are also fields for 'Username', 'Status' (Active), 'Challenge Status', 'Password', and 'Retype Password'. A 'Report Group' dropdown is set to 'Basic Record Management', and a 'Lines of Business' dropdown is set to 'Records Management'. A 'Help' icon is located at the bottom right of the form area.

1 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

2 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.

3 Complete any additional required fields and click Save.

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 Click the Records Management Access / Permissions link.

6 Save

7 HOME ADMIN

8 ADMINISTRATION User Business Groups

< Back

Profile

Save

Records Management Access/Permissions

Preferred Language: English (US)

Time Zone: GMT-5 EST, Eastern US

Date Format: MM/DD/YYYY

Time Format: HH.MM.SS AM/PM

Numeric Format: - 999,990.00

E-Mail Format: TEXT

Account

* Username:

Status: Active

Challenge Status:

Company: IMRM Quality Test 1

Organization Group: Entire Company

* Role:

- Client User Administrator
- Client Content Administrator
- Standard User

* Password:

* Retype Password:

Report Group: Basic Record Management

* Lines of Business: Records Management

Help

Assigning a User to an Organization Group

The screenshot shows the 'Records Management Access/ Permissions' configuration page. It includes a 'Profile' tab, a 'Save' button, and sections for 'Assign Permissions' and 'Assign Organizational Access'. The 'Assign Permissions' section has a 'SELECT ALL' checkbox, a 'General' section with 'Search for records' checked, and a 'Service Options' section with 'Order image on demand' checked. The 'Assign Organizational Access' section has a message about initial access and a list of organizations with checkboxes.

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.