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# Managing Organizations

**IRON MOUNTAIN CONNECT™ RECORDS MANAGEMENT**



# Managing Organizations

Tracking and managing multiple organizations within your company has never been easier thanks to Iron Mountain Connect Records Management.

The Manage Organizations screen provides you with a hierarchical snapshot of your organization's record management structure and constraints.

Find all of the information you need to effectively manage your organization in a single glance.

# Managing Organizations

The screenshot displays the Iron Mountain Connect Records Management interface. The top navigation bar includes the logo, user name 'Welcome rc2jen', country 'USA', and links for 'SUPPORT' and 'LOG OUT'. The left sidebar contains a navigation menu with 'Administration' highlighted. The main content area shows the 'Manage Organizations' screen with a list of organization codes (RC2M1 through RC2M9) and a 'Department' section.

**2** Select Manage Organizations. The Manage Organizations screen provides a hierarchical snapshot of your organization's record management structure and constraints.

**1** Select Administration. Use the left-side navigation bar to move within the different functional areas in Iron Mountain Connect Records Management.

Administration

RECORDS MANAGEMENT

> 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

Bulk Upload

Order Supplies

Destruction

Administration

Track Orders

Manage Organizations

Custo

RC2M1

RC2M2 [RC2M2]

RC2M4 [RC2M4]

RC2M5 [RC2M5]

RC2M6 [RC2M6]

RC2M7 [RC2M7]

RC2M8 [RC2M8]

RC2M9 [RC2M9]

RC2M [MB]

JSRC2

RC2

Rate Export

Department

Divisions -

- Select a Division to view Departments -

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# Managing Organizations

**Manage Organizations** ? Help

Manage your organization at the Customer, Division and/or Department levels; drill down to view, edit and add detailed account information. > Rate Export

**Customer**  Show Inactive

- JSRC2 [SRVC CF,BC=B,RMT=5]
- RC2M1 [RC2M1]
- RC2M2 [RC2M2]
- RC2M4 [RC2M4]
- RC2M5 [RC2M5]
- RC2M6 [RC2M6]
- RC2M7 [RC2M7]
- RC2M8 [RC2M8]
- RC2M9 [RC2M9]
- RC2MB [RC2MB]

**Division** + Create New

Customer Not Division-Enabled

**Department** + Create New  Show Inactive

Type here to filter

- 12 [BOARD OF DIRECTORS]
- 15 [DISTRIBUTION]
- DUTIVE]
- ERAL CORPORATE]
- AN RESOURCES]
- RMATION SERVICES]
- KETING]
- HANDISING]
- RE CONST/REAL ESTATE]
- RE OPERATIONS]

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**3** Select a Customer. If this customer uses divisions, they display after the customer is selected. The Department displays after you select customer and/or division (if used).

**Storage Summary**

Box	Files	Cubic Feet
2534	0	3040.8

**Activity for Last Month** Cubic Feet

New Received	0
Permanently Withdrawn	0
Destroyed	0

**Order Confirmation Emails** Edit

Name	Email
There are currently no confirmation emails	

**Organizations**

Number of Divisions	Number of Departments
0	19

**Address Profile**

Number of Shipping Addresses 3

**Invoices Mailed To**

Company Name: RC2M4 Name  
 Address: 22 Main Street  
 EDISON, NJ  
 08817  
 Contact: RC2M4 Contact  
 Phone: 7327775555

**Service Level**

Chargeback code is recommended for service

Priority	Order Received By	Service Provided By
Next Day Retrieval	2:45 PM	5:00 PM following day
Next Day Retrieval	11:59:59 PM	within 2 business days
Half Day Retrieval	10:00 AM	5:00 PM same day
Half Day Retrieval	3:00 PM	12:00 PM following day
Half Day Retrieval	11:59:59 PM	5:00 PM following day
Rush Retrieval	8:00 AM	11:00 AM same day
Rush Retrieval	3:00 PM	within 3 business hours
Rush Retrieval	11:59:59 PM	11:00 AM following day
Normal Pickup	any time	within 2 business days

**Data Profile**

Box data keyed from Iron Mountain transmittals.  
 Records must be assigned valid record codes; system manages retention schedule for all records.  
 Records must be assigned to valid departments.

**Filter Customer, Division and Department to reduce the number of results displayed.**

**Click the Show Inactive checkbox to include inactive customers and/or departments in your view.**

**Enter addresses for up to three users that will receive copies of ALL order confirmations, regardless of the requestor.**

# Managing Organizations

Customer Show Inactive Division + Create New Department + Create New

Type here then click filter

QA36 [QUALITY ASSURANCE TEST CLIENT #06]  
 RC2M1 [RC2M1]  
 RC2M2 [RC2M2]  
 RC2M3 [RC2M3]  
 RC2M4 [RC2M4]  
 RC2M5 [RC2M5]  
 RC2M6 [RC2M6]  
 RC2M7 [RC2M7]  
 RC2M8 [RC2M8]  
 RC2M9 [RC2M9]  
 RC2MA [RC2MA]  
 RC2S9 [RC2S9]

MASTER DIVISION  
 MR1199 [MEDICAL RECORDS]

- Select a Division to view Departments -

**INFORMATION FOR CUSTOMER RC2M8 [RC2M8]** ACTIVE

Storage Summary		
Box	Files	Cubic Feet
0	0	0

Activity for Last Month		Cubic Feet
New Received		0
Permanently Withdrawn		0
Destroyed		0

Order Confirmation Emails		Edit
Name	Email	
There are currently no confirmation emails		

Organizations	
Number of Divisions	Number of Departments
2	56

Address Profile

Number of Shipping Addresses **4**

Invoices Mailed To

Company Name: Test Industries  
 Address: 91 Main Street  
 OWINGS MILLS, MD  
 21117

Contact: RC2M8 Contact  
 Phone: 4107735555

Service Level

Chargeback code is recommended for service

Priority Order Received By Service Provided By

Data Profile

Files for some departments are individually listed.  
 Box data keyed from Iron Mountain transmittals.  
 Records must be assigned valid record codes; system manages retention schedule for all records.  
 Records must be assigned to valid departments.

**i** View your storage summary by number of boxes and files and in cubic feet.

**i** Click the number of addresses to open the Shipping Address Listing screen where you can [view and edit the addresses](#) associated with this user.

**i** View your organization's Data Profile, the set of parameters that control record storage and transmittal.

# Creating a New Division

The screenshot shows the 'Manage Organizations' interface. At the top, there are three columns: 'Customer', 'Division', and 'Department'. The 'Customer' column contains a list of customers, with 'RC2M8 [RC2M8]' selected. An orange callout box with the number '1' points to this selection, containing the text 'Select a Customer that is division-enabled.' The 'Division' column shows 'MASTER DIVISION'. The 'Department' column has a '+ Create New' button. An orange callout box with the number '2' points to this button, containing the text 'Click Create New.' Below the table, there is a detailed view for 'CUSTOMER RC2M8 [RC2M8]' which is 'ACTIVE'. This view includes sections for 'Storage Summary', 'Activity for Last Month', 'Order Confirmation Emails', 'Service Level', and 'Data Profile'.

# Creating a New Division

3

Enter the Division ID and Name that uniquely identify this division.

4

Save & Close to return to the Manage Organizations screen. The division is displayed on the screen.

OR

Save & Add Department if the division is department-enabled and you want to add a department. Refer to [Creating a New Department](#).

The screenshot displays the Iron Mountain Connect interface. At the top, the navigation bar includes the logo, user name 'Welcome rc2jen', and links for 'USA', 'SUPPORT', and 'LOG OUT'. The main content area is titled 'Manage Organizations' and features a table with columns for 'Division' and 'Department'. A 'Create Division' modal dialog is open, containing the following text: 'Enter division information. A master department will be automatically created; more departments may be added. Click Save & Close or Save & Add Department to create this division.' Below this text are two required input fields: '\*Division ID:' and '\*Division Name:'. The dialog also includes three buttons: 'Save & Close', 'Save & Add Department', and 'Cancel'. The background table shows a list of organizations with columns for 'Files', 'Cubic Feet', and 'Activity for Last Month'. A sidebar menu on the left contains options like 'Search, Retrieve', 'Pickups, Add Records', 'Order Supplies', 'Administration', and 'Track Orders'.

# Creating a New Department

The screenshot displays the IRON MOUNTAIN CONNECT interface. At the top, the navigation bar includes 'Welcome rc2jen', 'USA', 'SUPPORT', and 'LOG OUT'. The left sidebar shows 'Administration' with 'Manage Organizations' selected. The main content area is titled 'Manage Organizations' and contains a table with three columns: 'Customer', 'Division', and 'Department'. Each column has a search filter and a '+ Create New' button. Three orange callout boxes with blue circles containing numbers 1, 2, and 3 point to the 'Customer' column, the 'Division' column, and the 'Create New' button in the 'Department' column, respectively. Below the table, there is a summary section for 'Activity for Last Month' and 'Cubic Feet'.

Customer	Division	Department
QA49 [QUALITY ASSURANCE TEST CLIENT #49]	ROHITRC2M8 [ROHITRC2M8]	10417621627 [715686512575531]
RC2M1 [RC2M1]	SARAVANA308 [SARAVANA308]	12029697285 [271629275650444]
RC2M2 [RC2M2]	SWF/DCOVE/AQ [SWF/DCOVE/AQ]	1266775334 [363153051194711]
RC2M4 [RC2M4]	T/T [T&T]	14394874425 [885681039984369]
RC2M5 [RC2M5]	TEST DIV1 [TEST DIV1]	14543156201 [640190944987652]
RC2M6 [RC2M6]	TEST DIV2 [TEST DIV2]	1572358897 [453056259980956]
RC2M7 [RC2M7]	TEST DIV3 [TEST DIV3]	15828598433 [849290559617161]
RC2M8 [RC2M8]	TEST DIV4 [TEST DIV4]	15832390440 [360642811916829]
RC2M9 [RC2M9]		1665... [260380029437149]
RC2M...		1955...

Activity for Last Month: Cubic Feet

New Received	0
Permanently Withdrawn	0

Address Profile: Mailing Address



# Creating a New Department

**4** Enter the Department ID and Name that uniquely identify this department.

**5** Select the data format:

- If the department does not track files, select *Do not list files*.
- If the department tracks files, select *List files* and then select the data entry method.

**6** Save & Close to return to the Manage Organizations screen. The department will be displayed on the screen.

OR

Save & Add Department to continue adding other departments within the division.

IRON MOUNTAIN® CONNECT

CORDS MANAGEMENT

Welcome rc2jen USA SUPPORT LOG OUT

Manage Organizations

**Create New Department** ? Close X

Enter department information. Click Save & Close to save or Save & Add Department to save and add another department. \*Required field

Customer: RC2M8 [RC2M8]  
 Division: TEST DIV1 [TEST DIV1]

\*Department ID:   
 \*Department Name:   
 \*Data Format: List files  
 \*Data Entry Method:   
 Iron Mountain enters data from box contents  
 Iron Mountain enters data from Iron Mountain sheets  
 Iron Mountain enters data from customized sheets  
 Customer keys data via Iron Mountain Connect  
 Customer transmits data to Iron Mountain

Save & Close Save & Add Department Cancel

Box	Files	Cubic Feet	Number of Departments	Active	Inactive
0	0	0	104	102	2
Activity for Last Month			Cubic Feet		
New Received			0		
Permanently Withdrawn			0		

Address Profile Mailing Address

# Editing a Division or Department

IRON MOUNTAIN® CONNECT

Welcome rc2jen USA SUPPORT LOG OUT

RECORDS MANAGEMENT

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

Bulk Upload

Order Supplies

Destruction

Administration

Track Orders

1 Highlight a division or department.

2 Click Edit. You are able to edit the Division or Department Name, and change the data format and data entry method a department uses.

Organizations

Customer  Show Inactive Division

Type here to filter

Customer	Division	Item ID	Item Name
QA49 [QUALITY ASSURANCE TEST CLIENT #49]	ROHITRC28 [ROHITRC28]	12667	94711]
RC2M1 [RC2M1]	SARAVANA308 [SARAVANA308]	143948744	4369]
RC2M2 [RC2M2]	SWF/DCOVE/AQ [SWF/DCOVE/AQ]	14543156201	52]
RC2M4 [RC2M4]	T/T [T&T]	1572358897	[45305
RC2M5 [RC2M5]	TEST DIV1 [TEST DIV1]	15828598433	[84929055
RC2M6 [RC2M6]	TEST DIV2 [TEST DIV2]	15832390440	[360642811916
RC2M7 [RC2M7]	TEST DIV3 [TEST DIV3]	16695666399	[260380029437149]
RC2M8 [RC2M8]	TEST DIV4 [TEST DIV4]	19558529827	[323870108705172]
RC2M9 [RC2M9]	TEST DIV5 [TEST DIV5]		
RC2MB [RC2MB]	TEST DIV6 [TEST DIV6]		

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Information for Division TEST DIV1 [TEST DIV1] [Edit] Active

Storage Summary		
Box	Files	Cubic Feet
0	0	0

Organizations		
Number of Departments	Active	Inactive
104	102	2

Activity for Last Month

	Cubic Feet
New Received	0
Permanently Withdrawn	0

Address Profile

Mailing Address

# Exporting Your Service Rate Report

IRON MOUNTAIN CONNECT

RECORDS MANAGEMENT

Welcome rc2jen USA SUPPORT LOG OUT

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  
 Bulk Upload  
 Order Supplies  
 Destruction  
**Administration**  
 Track Orders

**Manage Organizations** Help

Manage your organization at the Customer, Division and/or Department levels; drill down to view, edit and add detailed account information. [Rate Export](#)

Customer	Division	Department
QA49 [QUALITY ASSURANCE TEST CLIENT #49]	ROHITRC2M8 [ROHITRC2M8]	14394874425 [885681039984369]
RC2M1 [RC2M1]	SARAVANA308 [SARAVANA308]	14543156201 [640190944987652]
RC2M2 [RC2M2]	SWF/DCOVE/AQ [SWF/DCOVE/AQ]	1572358897 [453056259980956]
RC2M4 [RC2M4]	T/T [T&T]	15828598433 [849290559617161]
RC2M5 [RC2M5]	TEST DIV1 [TEST DIV1]	15832390440 [360642811916829]
RC2M6 [RC2M6]	TEST DIV2 [TEST DIV2]	16695666399 [260380029437149]
RC2M7 [RC2M7]	TEST DIV3 [TEST DIV3]	19558529827 [323870108705172]
RC2M8 [RC2M8]	TEST DIV4 [TEST DIV4]	
RC2M9 [RC2M9]	TEST DIV5 [TEST DIV5]	
RC2MB [RC2MB]	TEST DIV6 [TEST DIV6]	

1 Click the Rate Export link.

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Information for Division TEST DIV1 [TEST DIV1] [\[Edit\]](#) [Active](#)

Storage Summary			Organizations		
Box	Files	Cubic Feet	Number of Departments	Active	Inactive
0	0	0	104	102	2

Activity for Last Month		Cubic Feet
New Received		0
Permanently Withdrawn		0

Address Profile  
Mailing Address

# Exporting Your Service Rate Report

IRON MOUNTAIN® CONNECT

RECORDS MANAGEMENT

Welcome rc2jen USA SUPPORT LOG OUT

Administration << Manage Organizations ? Help

> 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

Bulk Upload

Order Supplies

Destruction

Administration

Track Orders

Manage Organizations

Manage your organization at the Customer, Division and/or Department levels; drill down to view, edit and add detailed account information. > Rate Export

Customer

Show Inactive

Division

Create New

Department

Create New

Show Inactive

Type here to filter

QA36 [QUALITY ASSURANCE TEST]

QA49 [QUALITY ASSURANCE TEST]

RC2M1 [RC2M1]

RC2M2 [RC2M2]

RC2M4 [RC2M4]

RC2M5 [RC2M5]

RC2M6 [RC2M6]

RC2M7 [RC2M7]

RC2M8 [RC2M8]

RC2M9 [RC2M9]

Page 1 of 1

29 Items

Page 1 of 2

102 Items

Information for Division TEST DIV1 [TEST DIV1] [Edit] Active

Storage Summary

Box	Files	Cubic Feet
0	0	0

Activity for Last Month

	Cubic Feet
New Received	0
Permanently Withdrawn	0

Organizations

Number of Departments	Active	Inactive
104	102	2

Address Profile

Mailing Address

Export Rate Report

Close X

Select an organization, then export the rate schedule for their Iron Mountain services.

Customer

RC2M4 [RC2M4]

Export

Cancel

2

Select a Customer, then click Export. The Rate Report.csv that downloads lists your organization's service rates.