Managing Shipping Addresses

for Administrators

IRON MOUNTAIN CONNECT™ RECORDS MANAGEMENT

![Iron Mountain logo]

Table of Contents

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Overview: Managing Shipping Addresses

The shipping address is the location where Iron Mountain:

- Picks up records for storage
- Delivers records from storage
- Delivers supplies

System administrators manage shipping addresses from a centralized repository to ensure that they are synchronized system-wide.

Use this guide to learn how to:

- Create a shipping address

- Add users to / restrict users from a shipping address

- Filter to find a shipping address

- Remove a shipping address

- Give select users the permission to create a shipping address

System administrators refer to the Using Shipping Addresses How To training guide.

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Shipping Address Access

New Addresses:

- **Administrators:** As a system administrator, you automatically have access to all addresses for the companies you are assigned to.

- **Standard Users:** Are automatically granted access to all new addresses for companies they are assigned to. As a system administrator, you must manually deselect users that should not have access to a new address.

Existing Addresses:

- **Administrators:** As a system administrator, you automatically have access to all addresses for the companies you are assigned to.

- **Standard Users:** Are not granted access to existing addresses. As an administrator, you must manually grant user access to existing addresses.

Role Changes:

Administrators that have been converted to standard users lose all address access and must be manually granted access by their system administrator.

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Creating a Shipping Address

MANAGE ADDRESSES

Add, view, edit and remove shipping addresses that users enter on pickup, retrieval and supply orders.

Choose Customer:

Select   Add Address

Select a Customer ID to view the list of a...

2 Select Manage Addresses. The Manage Address screen displays.

1 Select Administration to begin the process of entering a new shipping address.

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

Creating a Shipping Address

3 Select the customer you are creating the shipping address for. Addresses associated with the customer display.

4 Click Add Address to enter a new shipping address for this customer. The Address wizard opens.

Creating a Shipping Address

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Welcome rc2jen   USA   SUPPORT ▾   LOG OUT

ADMINISTRATION «

MANAGE ADDRESSES FOR CUSTOMER RC2M1   ? Help

Manage Organizations
Manage Organization Groups
Manage Supply Lists
Manage Box Templates
Manage File Templates
Manage Addresses
Manage Record Codes
Manage Holds

| Address Details | Choose Users | Confirm |

Enter the required address fields, then assign users.

Cancel   **Choose Users >**

*Ship To Code: NWT
*Company Name: JayCo
*Address Li
Address Li
Address Li

*State/Province/Re
*ZIP/Postal C
*Co
*Contact N
*Contact P
Contact E

*Required field

*Ship To Code: NWT
*Company Name: JayCo
*Address Line 1: 1000 Campus Drive   Street Address, Post Office Box
*Address Line 2:   Apt., Suite, Unit, Building
*Address Line 3:   Floor: 4
*City: Collegeville
*State/Province/Region: PENNSYLVANIA
*ZIP/Postal Code: 19426
*Country: UNITED STATES
*Contact Name: Jeff Smalls
*Contact Phone: 2158029387
Contact Email: JSmalls@me.com ✕

SEARCH, RETRIEVE
PICKUPS, ADD RECORDS
BULK UPLOAD
ORDER SUPPLIES
DESTRUCTION
ADMINISTRATION
TRACK ORDERS

6

Click Choose Users.

5

Enter required shipping address details (marked with a red asterisk *).

i

Ship-to Code can contain up to 7 alphanumeric characters , dashes (-), periods (.) and backslashes (/).

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Creating a Shipping Address

By default, ALL users have access to a NEW address. You must MANUALLY deselect users to remove access to the new address.

8 Click Confirm.

7 Set user access for this address:
- Click Assign All Users/Unassign All Users links to assign or unassign ALL users with a single click.
  OR
- Click the checkbox to the left of each user to assign or unassign individual users.

Users who are not selected are restricted from seeing and using the address.

i By default, ALL users have access to a NEW address. When you create an address, you must MANUALLY deselect users to remove access to the address.

Creating a Shipping Address

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RECORDS MANAGEMENT

ADMINISTRATION «

MANAGE ADDRESSES FOR CUSTOMER RC2M1

? 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

Address Details   **Confirm**

9

Review the address details and click Finish.

Confirm Customer ID, new Shipping Address, and assigned Users. Click Finish to save

< Choose Users   Cancel   **Finish**

Summary

Customer

RC2M1 [RC2M1]

Shipping Address

1000 Campus Drive, Collegeville, PA 19426

Users

*CUADEC4 *CUADEC4
test 1233
DEc 15
test 23424234
ram 3
4444 44444
rc2ram5 5
Limited Access
Testimt6 Adam15
Testimt6 Adam15
Testimt6 Adam15
Testimt6 Adam15
2246 Adm001
2246 Adm001
2246 Adm002
2246 Adm003
2246 Adm004
2246 Adm005
2246 Adm006
2246 Adm007
2246 Adm008
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2246 Adm010
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2246 Adm015
2246 Adm016

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Filtering (Finding) Shipping Addresses

Apply filters to long lists to reduce the number of addresses that display.
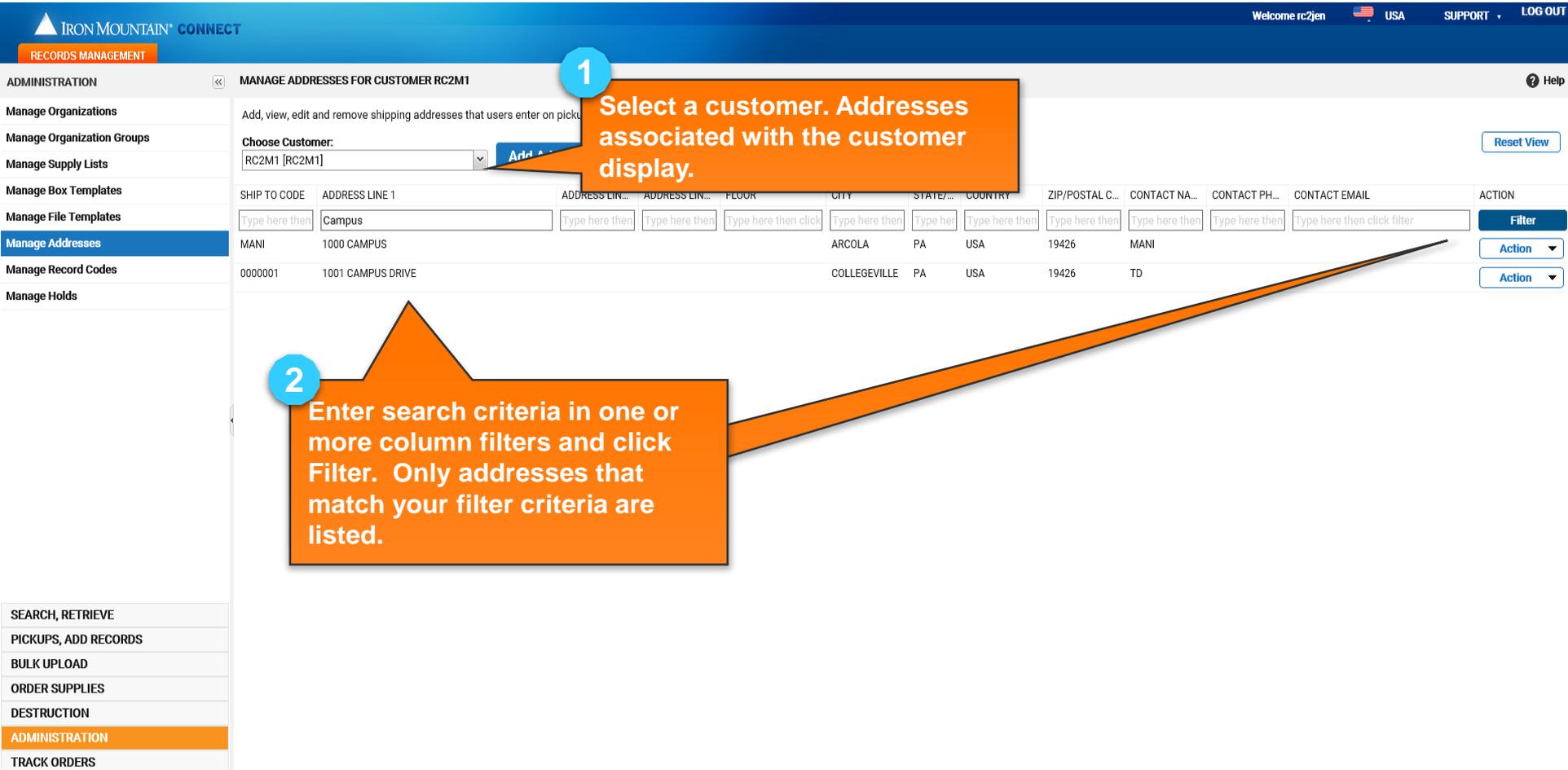
1 Select a customer. Addresses associated with the customer display.

2 Enter search criteria in one or more column filters and click Filter. Only addresses that match your filter criteria are listed.

Removing an Address / Removing Access to an Address

As a system administrator you have two options for removing shipping addresses:

- **Permanently Remove a Shipping Address**
  Removing a shipping address permanently deletes the address. No backup/audit records are available. Refer to Removing a Shipping Address.

- **Removing Access to a Shipping Address**
  To remove user access to a shipping address without permanently removing it, manually unassign all users who have access to the shipping address.

  The address remains in Iron Mountain Connect Records Management, but users can not view or access it. Refer to Removing Access to a Shipping Address.

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Removing a Shipping Address

Removing permanently deletes a shipping address. No backup/audit records are available.

Highlight a shipping address, then select Remove from the Action dropdown to the right of the address.

Removing a Shipping Address

Click Remove. The shipping address is permanently removed and a success message displays.

Note that users who place phone orders may experience a temporary delay before the address is removed.

A shipping address CANNOT be removed if one of the following conditions exists:
- **It is the only address assigned to a user or to this customer**
- **It has been used on an order within the last 13 months**
- **It is associated with a recurring order**
- **It is associated with a shredding profile**
- **It is a department's default Ship To or Attention To address**

Removing Access to a Shipping Address

Manually remove user access to a shipping address without permanently removing it.

1 Click the Unassign All Users link.

The shipping address will not display when users place orders.

i Remove user access to a shipping address from the Choose User step in the Address wizard while creating or from the User tab screen while editing an address.

Enabling Users to Create Shipping Addresses

i System administrators can give users the permission required to create and edit addresses, and add users to those addresses.

1 From the Iron Mountain Connect home page, select Manage Users.

2 Select the *Create/edit shipping address* permission on the Records Management Access / Permissions screen

Enabling Users to Create Shipping Addresses

The Add Address button displays on the Shipping Address List screen for users who you have given the *Create/edit shipping address* permission.

Users without this permission do not see this button.