



Managing Shipping Addresses

for Administrators

IRON MOUNTAIN CONNECT™ RECORDS MANAGEMENT



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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](#).

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.

Creating a Shipping Address

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Welcome rc2jen USA SUPPORT LOG OUT

RECORDS MANAGEMENT

ADMINISTRATION MANAGE ADDRESSES 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

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

Select Manage Addresses. The Manage Address screen displays.

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.

Reset View

Creating a Shipping Address

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 Cl...
Manage Holds

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

Choose Customer:
RC2M1 [RC2M1] **Add Address** [Reset View](#)

SHIP...	ADDRESS LINE 1	ADDRESS LIN...	ADD...	FLOOR	CITY	STATE/...	COUNTRY	ZIP/POSTAL C...	CONTACT NA...	CONTACT PH...	CONTACT EMAIL	ACTION
	Type here then click filter	Type here then	Type here then		Type here then	Type he	Type here then	Type here then	Type here then	Type here then	Type here then click filter	Filter
est6					NY	USA	00501	3543	45345			Action
											rc2m2@rc2.com	Action
									90909090		bala.bayyavarapu@ironmountain.com	Action
SH9667	1100 MAIN694			fir	NORRISTOWN	PA	USA	19406	Prashant	90909090	bala.bayyavarapu@ironmountain.com	Action
SH6892	1100 MAIN153			fir	NORRISTOWN	PA	USA	19406	Prashant	90909090	bala.bayyavarapu@ironmountain.com	Action
21NOV23	21NOV23	21NOV23			BOSTON	MA	USA	02111	21NOV23	52345324		Action
21NOV22	21NOV22	21NOV22			BOSTON	MA	USA	02111	21NOV22	3453425		Action
21NOV2	21NOV2	21NOV2			BOSTON	MA	USA	02111	21NOV2	3245345		Action
21NOV	21NOV				BOSTON	MA	USA	02111	21NOV	324532452		Action
FEV6	fev6				BEACH HAVEN WEST	NJ	USA	08050	fev6	24234		Action
FEV5	fev5				ROCKY HILL	NJ	USA	08553	fev5	451234234		Action
FEV3	fev3				BAYONNE	NJ	USA	07002	fev3	234243		Action
FVE1	fve1				AVENEL	NJ	USA	07001	fve1	45345345		Action
RIM1236	RIM1236				BOSTON	MA	USA	02111	RIM1236	34535353	RIM1236@RIM1236.com	Action
0000004	93 Main Street				12 MILE	IN	USA	46988	RC2M1 Contact		rc2m1@rc2.com	Action
0000002	73 Main Street				LOS ANGELES	CA	USA	90013	RC2M1 Contact		rc2m1@rc2.com	Action

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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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ADMINISTRATION MANAGE ADDRESSES FOR CUSTOMER RC2M1

Address Details Choose Users Confirm

Enter the required address fields, then assign users.

Cancel Choose Users >

*Ship To Code: NWT *Required field

*Company Name: JayCo

*Address L: *Ship To Code: NWT

Address L: *Company Name: JayCo

Address L: *Address Line 1: 1000 Campus Drive Street Address, Post Office Box

*State/Province/Region: Address Line 2: Apt., Suite, Unit, Building

*ZIP/Postal Code: 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

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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 (/).

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.

ADMINISTRATION **RECORDS MANAGEMENT**

ADMINISTRATION << MANAGE ADDRESSES FOR CUSTOMER RC2M1 Help

Address Details Confirm

Add or remove user access to this address, then click Confirm to review summary data and create this address. 1

< Address Details Cancel Confirm > Reset View

Assign All Users Unassign All Users

<input checked="" type="checkbox"/>	FIRST NAME	LAST NAME	ACTION
<input checked="" type="checkbox"/>	*CUADEC4	*CUADEC4	Filter
<input checked="" type="checkbox"/>	test	1233	
<input checked="" type="checkbox"/>	DEc	15	
<input checked="" type="checkbox"/>	test	23424234	
<input checked="" type="checkbox"/>	ram	3	
<input checked="" type="checkbox"/>	4444	44444	
<input checked="" type="checkbox"/>	rc2ram5	5	
<input checked="" type="checkbox"/>	Limited		
<input checked="" type="checkbox"/>	Testimt6		
<input checked="" type="checkbox"/>	Testimt6	Adam15	
<input checked="" type="checkbox"/>	Testimt6	Adam15	
<input checked="" type="checkbox"/>	Testimt6	Adam15	
<input checked="" type="checkbox"/>	2246	Adm001	
<input checked="" type="checkbox"/>	2246	Adm001	test@ironmountain.com Adm001TestIndustries
<input checked="" type="checkbox"/>	2246	Adm002	@ironmountain.com Adm002_TIND
<input checked="" type="checkbox"/>	2246	Adm003	ironmountain.com Adm003_TIND
<input checked="" type="checkbox"/>	2246	Adm004	
<input checked="" type="checkbox"/>	2246	Adm005	

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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

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

MANAGE ADDRESSES FOR CUSTOMER RC2M1

Help

Address Details

9

Review the address details and click Finish.

Confirm

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

2246 Adm009

2246 Adm010

2246 Adm011

2246 Adm012

2246 Adm013

2246 Adm014

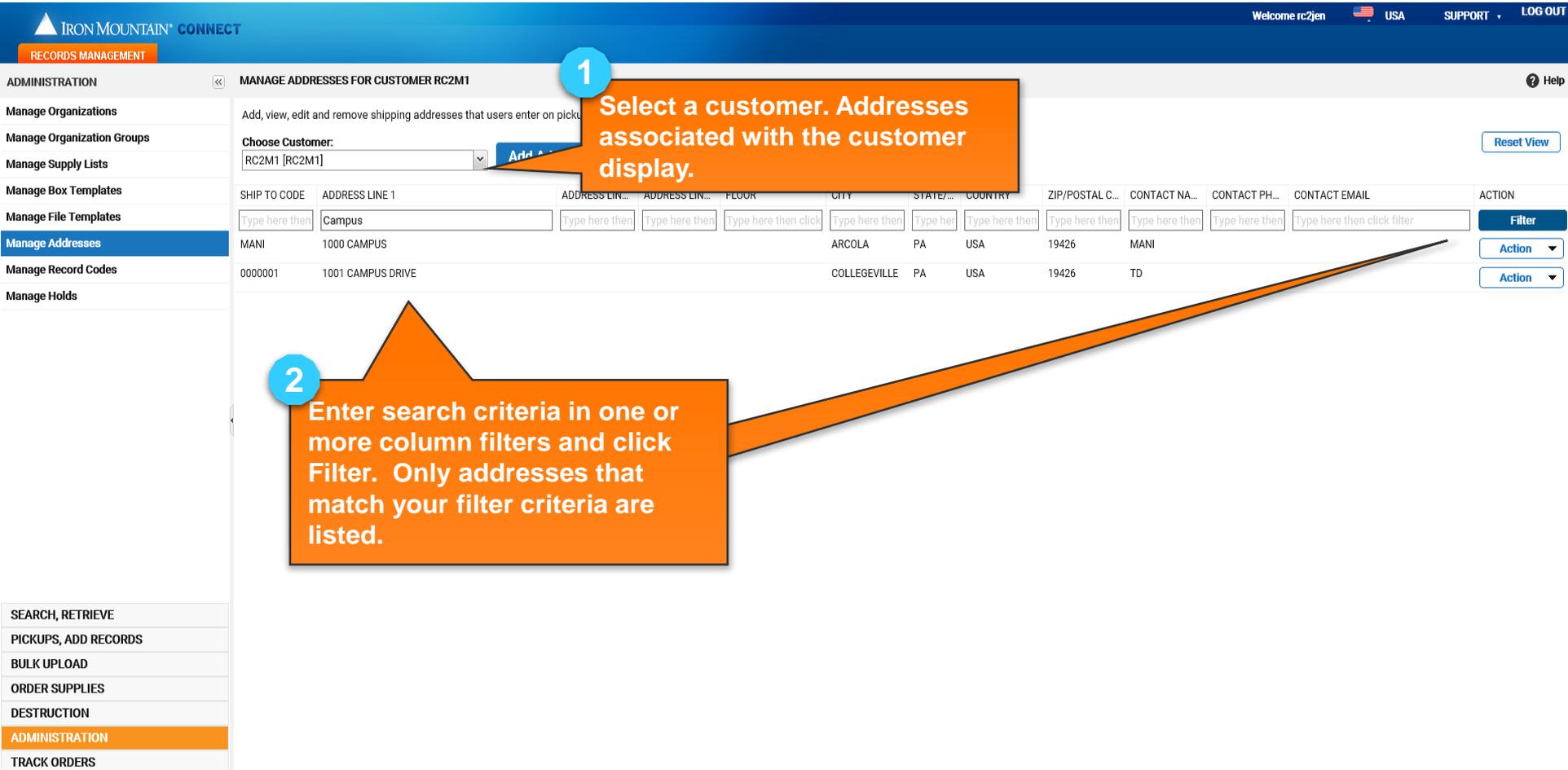
2246 Adm015

2246 Adm016

- SEARCH, RETRIEVE
- PICKUPS, ADD RECORDS
- BULK UPLOAD
- ORDER SUPPLIES
- DESTRUCTION
- ADMINISTRATION
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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.

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RECORDS MANAGEMENT

ADMINISTRATION

MANAGE ADDRESSES FOR CUSTOMER RC2M1

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

Choose Customer: RC2M1 [RC2M1]

SHIP TO CODE	ADDRESS LINE 1	ADDRESS LIN...	ADDRESS LIN...	FLOOR	CITY	STATE/...	COUNTRY	ZIP/POSTAL C...	CONTACT NA...	CONTACT PH...	CONTACT EMAIL	ACTION
MANI	1000 CAMPUS				ARCOLA	PA	USA	19426	MANI			Filter
0000001	1001 CAMPUS DRIVE				COLLEGEVILLE	PA	USA	19426	TD			Action

SEARCH, RETRIEVE

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WELCOME rc2jen USA SUPPORT LOG OUT

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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](#).

Removing a Shipping Address

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

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RECORDS MANAGEMENT

Welcome rc2jen USA SUPPORT LOG OUT

ADMINISTRATION MANAGE ADDRESSES FOR CUSTOMER RC2M1

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

Choose Customer: RC2M1 [RC2M1] **Add Address** [Reset View](#)

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

SHIP TO CODE	ADDRESS LINE 1	ADDRESS LIN...	ADDRESS LIN...	FLOOR	CITY	STATE/...	COUNTRY	ZIP/POSTAL C...	CONTACT NA...	CONTACT PH...	CONTACT EMAIL	ACTION
TEST6	test6				HOLTSVILLE		USA	00501	3543	45345		Filter Action
ADD	ARCOLA				ARCOLA							Action
MANI	1000 CAMPUS				ARCOLA							View Details Edit Remove Action
W020585	99 Main Street				12 MILE							Action
SH5118	1100 MAIN668			fir	NORRISTOWN							Action
SH9667	1100 MAIN694			fir	NORRISTOWN						pu@ironmountain.com	Action
SH6892	1100 MAIN153			fir	NORRISTOWN	PA	USA	19406	Prashant	90909090	bala.bayyavarapu@ironmountain.com	Action
21NOV23	21NOV23	21NOV23			BOSTON	MA	USA	02111	21NOV23	52345324		Action
21NOV22	21NOV22	21NOV22			BOSTON	MA	USA	02111	21NOV22	3453425		Action
21NOV2	21NOV2	21NOV2			BOSTON	MA	USA	02111	21NOV2	3245345		Action
21NOV	21NOV				BOSTON	MA	USA	02111	21NOV	324532452		Action
FEV6	fev6				BEACH HAVEN WEST	NJ	USA	08050	fev6	24234		Action
FEV5	fev5				ROCKY HILL	NJ	USA	08553	fev5	451234234		Action
FEV3	fev3				BAYONNE	NJ	USA	07002	fev3	234243		Action
FVE1	fve1				AVENEL	NJ	USA	07001	fve1	45345345		Action
RIM1236	RIM1236				BOSTON	MA	USA	02111	RIM1236	34535353	RIM1236@RIM1236.com	Action
0000004	93 Main Street				12 MILE	IN	USA	46988	RC2M1 Contact		rc2m1@rc2.com	Action
0000002	73 Main Street				LOS ANGELES	CA	USA	90013	RC2M1 Contact		rc2m1@rc2.com	Action

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

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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.

Shipping Address: 99 Main Street, 12 MILE, IN, 46988

ADDRESS USERS

Assign or unassign users to this shipping address

[Reset View](#)

[Unassign All Users](#)

FIRST NAME	LAST NAME	EMAIL	USERNAME	ACTION
*CUADEC4	*CUADEC4	1CUADEC4@imc.com	1CUADEC4	<input type="checkbox"/>
test	1233	test@ironmountain.com	ram_std11	<input type="checkbox"/>
DEc	15	test@ironmountain.com	dec125	<input type="checkbox"/>
test	23424234	test@ironmountain.com	testimt_09112017...	<input type="checkbox"/>
ram	3	test@ironmountain.com	ramtest3	<input type="checkbox"/>
4444	44444	test@ironmountain.com	rc2_anothertest	<input type="checkbox"/>
rc2ram5	5	test@ironmountain.com	rc2ram5	<input type="checkbox"/>
Limited	Access	test@ironmountain.com	talimited	<input type="checkbox"/>
Testimt6	Adam15	test@ironmountain.com	testTZ_6	<input type="checkbox"/>
Testimt6	Adam15	test@ironmountain.com	testTZ1_25	<input type="checkbox"/>
Testimt6	Adam15	test@ironmountain.com	lkarthik_25	<input type="checkbox"/>
Testimt6	Adam15	test@ironmountain.com	testTZ1_6	<input type="checkbox"/>

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[Save](#) [Cancel](#)

Enabling Users to Create Shipping Addresses

IRON MOUNTAIN® CONNECT

Welcome Demo User PROFILE ENGLISH (US) SUPPORT LOG OUT

HOME ADMIN

< Back Terminate jakekim123 Active 214-119-0192 jkim@me.com Help

Profile

Records Management Access/Permissions Save

- Remove hold codes from records
- View box record details
- View file record details

Bulk Data Upload:

- Bulk Upload

Administration:

- Manage customer settings
- Manage divisions
- Create hold codes
- Edit hold codes
- Manage departments
- Assign/remove record code holds
- Assign/remove department holds
- View record code profiles
- Manage record codes
- Manage templates
- View addresses
- Create/edit shipping address
- Access shredding services
- Edit shredding visit profile contact
- Customize supply list
- View organizations

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 screenshot shows the Iron Mountain Connect interface. At the top, the logo and navigation links are visible. The main content area is titled 'Shipping Address List' and includes a message: 'You are required to select a physical address to continue with the order process.' Below this is an 'Add Address' button, which is highlighted by an orange callout box. The callout box contains the text: '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.' Below the button, there is an information icon and the text: 'There are no results that match your filter(s).' and 'You do not currently have any delivery addresses assigned to you'. The bottom of the screen shows a table with columns for 'LINE', 'ID', 'REQUESTED FOR', 'ITEM INSTRUCTIONS', and 'RETRIEVAL METHOD'. The first row contains the values: '1', '20022019', 'Stackhouse, Jennifer', and 'Checkout'.

3

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.

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CUSTOMER: RC2MB [RC2MB]

Bill To Department: MASTER DEPARTMENT

Instructions:

LINE	ID	REQUESTED FOR	ITEM INSTRUCTIONS	RETRIEVAL METHOD
1	20022019	Stackhouse, Jennifer		Checkout