# **Managing Users**

IRON MOUNTAIN CONNECT™



US-RM-INT-PPT-10.2017

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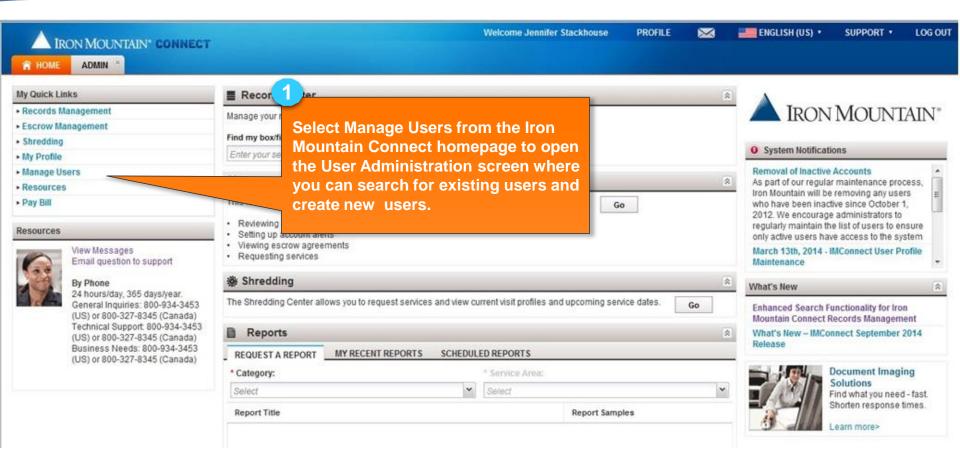
# **Managing Users**

Administrators assign each Iron Mountain Connect user a user profile where key information is stored and access and permissions are set.

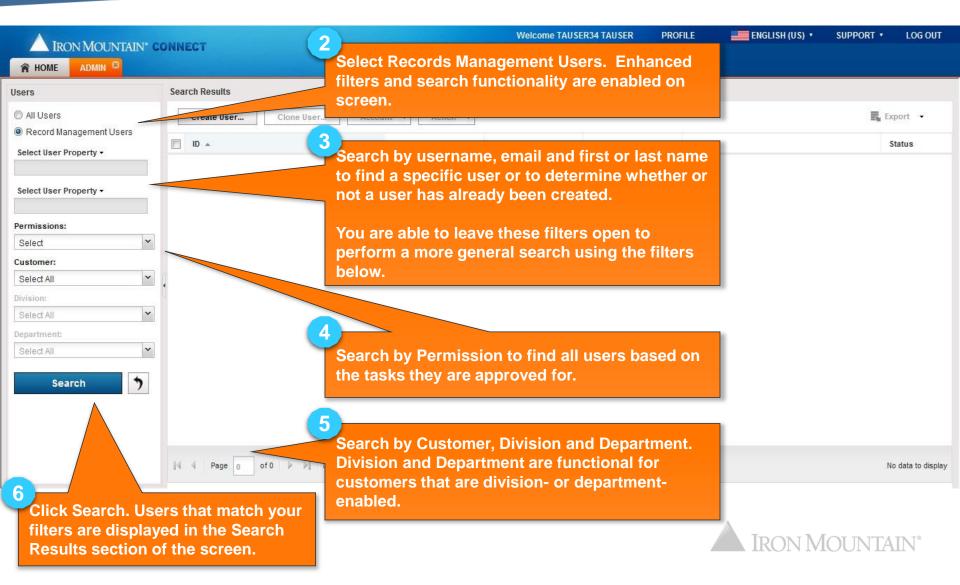
Use this section to learn how to:

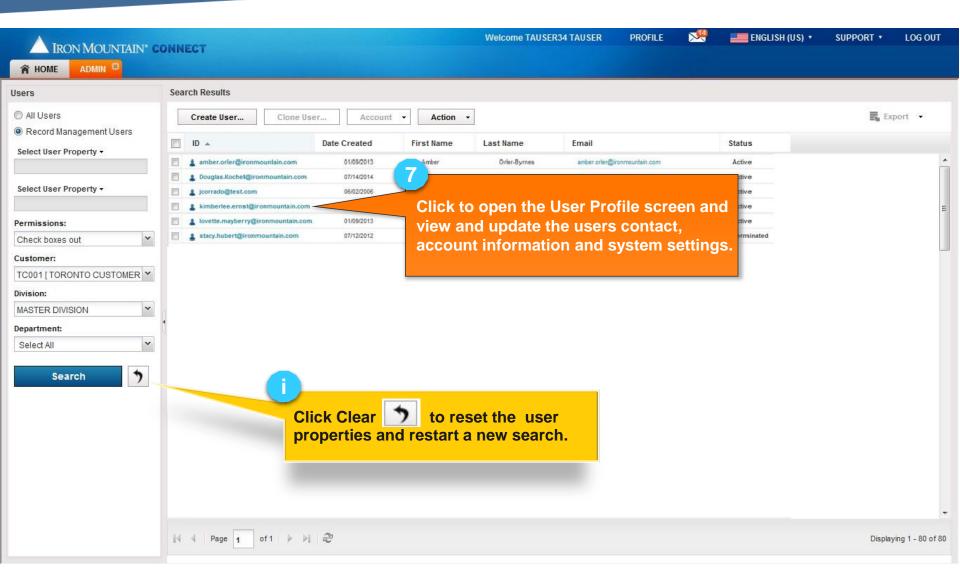
- Search for existing users
- Modify an existing user's profile
- Create a new user
- Give users access and permission to Iron Mountain Connect Records Management
- Clone a user profile to save valuable data entry time
- Export a list of users











IRON MOUNTAI		Back to return t	o the User	Welcome Jennifer Stackhouse	PROFILE		ENGLISH (US) 🔹	SUPPORT •	LOG OI
		e screen.							
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Profile Records Management Access/Privileges	Save Clone Contact Information			8					8
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	* Last Name: Post Name:	corrado		•					
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	Address Line 3:	Street address, PO box Royersford		sections. Cl		nge the	•		
	* State/Province/Region:		* *						



# **Creating a New User**

	DNNECT	Welcome TAUSER34 TAUSER PROFILE 🔀	ENGLISH (US) • SUPPORT • LOG OUT
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Users  All Users  Record Management Users  Select User Property •  Select User Property •  Permissions: Check boxes out  Customer: TC001 [TORONTO CUSTOMER  Division: MASTER DIVISION  Department: Select All   Search	Create User       Clone User       Account         ID *       O         & amber.orler@ironmountain.com       01/09/2013         * Douglas.Kochet@ironmountain.com       07/14/2014         * jcorrado@test.com       06/02/2006         * kimberlee.ernst@ironmountain.com       09/19/2014         * lovette.mayberry@ironmountain.com       01/09/2013	Action Constrained with this user, is a sociated with this user, is create User to open the User of ile screen.	Status Active Active Active Active Terminated
	4 4 Page 1 of1 ▶ ▶   @		▼ Displaying 1 - 80 of 80

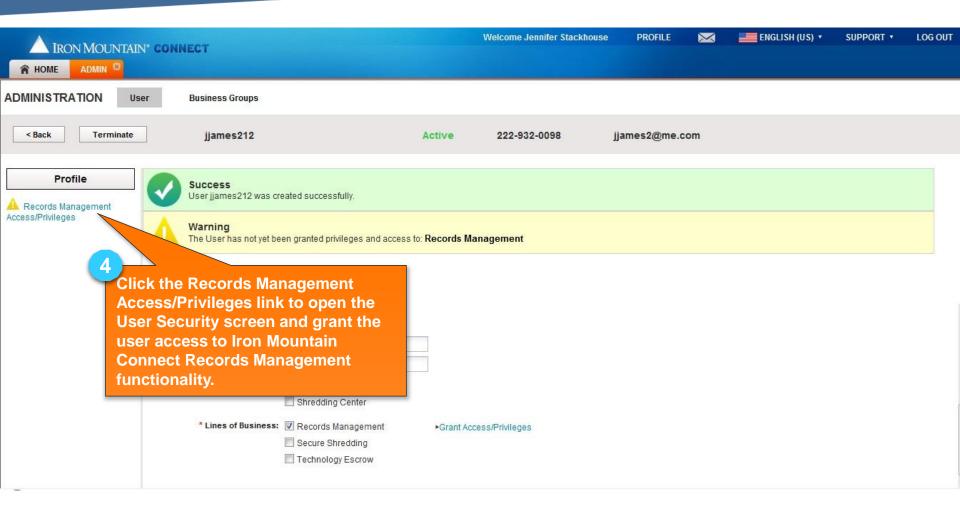
#### **Creating a New User**

IRON MOUNTAIN" CONNECT		Welcome Demo User PROFILE ENGLISH (US) • SUPPORT • L	LOG OUT
ADMIN 8		Enter as much information as possible in the	
< Back		user profile. You must enter data in all required fields (marked with a red asterisk *).	🕜 Help
Password Reset: Report Group:	Active v	<ul> <li>a. Enter the username and set the user's role.</li> <li>b. Select one of the following to control how the user's password is set: <ul> <li>System-generated: Iron Mountain Connect automatically emails a system-generated password to the email address on the user profile at user creation.</li> <li>Manually-generated: Manually create the password and email it to the user.</li> </ul> </li> <li>c. Select the Records Management application to give access to Iron Mountain Connect for Records Management.</li> <li>d. Set the Report Group to Basic Records Management to give access to Records Management reports within Report Center.</li> </ul>	d
		Click Save to create the user profile.	

There is a delay while the system finalizes the user, and you can continue to step 4.

^

#### **Creating a New User: Setting User Access/Permissions**

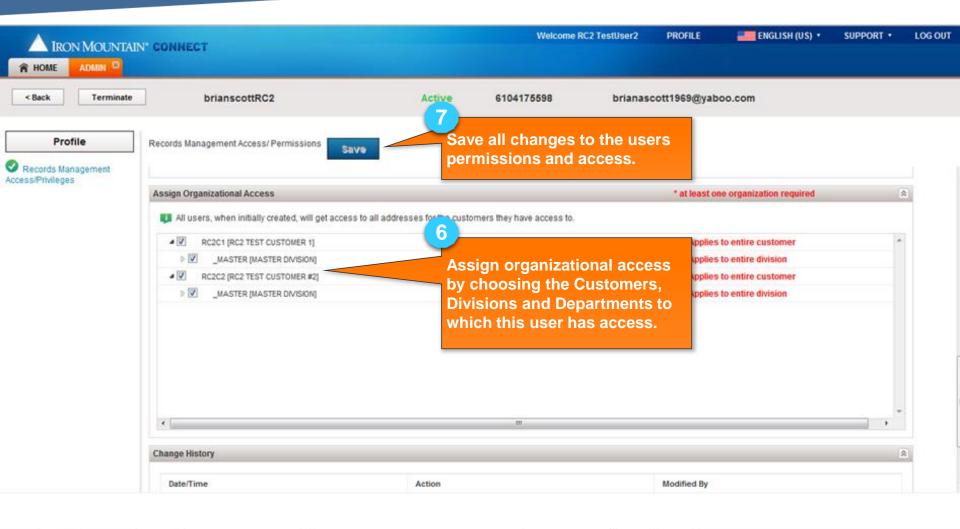




#### Creating a New User: Setting User Access/Permissions

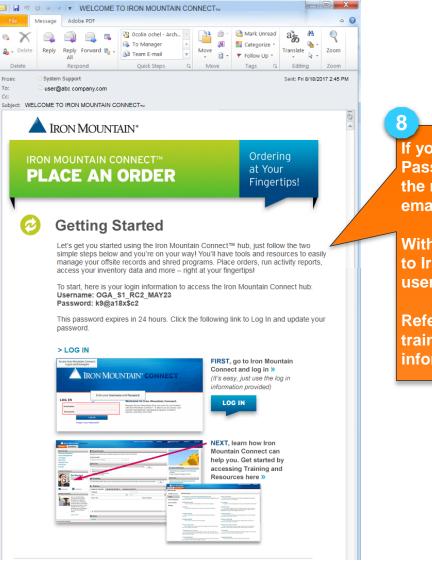
	N' CONNECT		Welcome RC	2 TestUser2	PROFILE	ENGLISH (US) 🔹	SUPPORT •	LOG OUT
< Back Terminate	jstevens12	Active	215-049-4985	jsteven	s1@medtech.r	net		
Profile	Warning There is a delay while your user record is final Records Management Access/ Permissions         Save	5	mplete, you may assign and a					
	Assign Permissions		alized. Once tl			e permission required		
	<ul> <li>SELECT ALL</li> <li>General:</li> <li>Search for records</li> <li>Service Options:</li> <li>Check boxes out</li> <li>Check files out</li> <li>Check files out</li> <li>Order unlisted files</li> <li>Order copies of records</li> <li>Order fax transmission of records</li> <li>Order pickup service</li> <li>Order supplies</li> <li>Permanently remove boxes from storage</li> <li>Permanently remove files from storage</li> <li>Service Level Options:</li> <li>Premium service half day</li> <li>Premium service rush</li> <li>Order Inquiry:</li> <li>Track order</li> </ul>	The Record Access/Perrinto three ex sections: • Permissio • Organizat • History	ser permission s Management missions scree xpandable/coll	ns. en is divi apsible	ded			E

## **Creating a New User: Setting User Access/Permissions**





#### **Creating a New User: New User Welcome Email**



If you selected the System-generated Password Reset option in step 2b, the new user receives this Welcome email.

Within 24 hours, the user must log in to Iron Mountain Connect with the username and password provided.

Refer to the *Password Reset* How To training guide for additional information.



## **Setting Access/Permissions for Multiple Users**

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sers		Sear	rch Results					
<ul> <li>All Users</li> <li>Record Management Users</li> </ul>			Create User Clone User	Search for the users to set permissions/				📕 Export 👻
Select User Property -				Searching for Exist	ing Users.		Email	Status
Select user Property -		V	LUA1_RC2_DELPHI	01/15/2	CZ_DELPHI	CUAT_RCZ_DELPHI	CUA1_RC2_DELPHI@test.com	ACTIVE
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ustomer:			LUA_RC2_DELPHI_cua	select multiple chec	KDOXES.	cua	Venkatalakshmi.Nandipati@ironmountain.com	ACTIVE
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epartment:		1	LIMT_CUA_DELPHI_JAN20_11	01/20/2015	IMT_CUA_DELPHI_JA	IMT_CUA_DELPHI_JA	vikrankkkkk@ironmountain.com	ACTIVE
Select All	~		IMT_STD_DELPHI_JAN20	01/20/2015	IMT_STD_DELPHI_JAN	IMT_STD_DELPHI_JAN	IMT_STD_DELPHI_JAN20@iron.com	ACTIVE
			IMT_STD_DELPHI_JAN20_2	01/20/2015	IMT_STD_DELPHI_JAN	IMT_STD_DELPHI_JAN	IMT_STD_DELPHI_JAN20_2@iron.com	ACTIVE
Search	5		L no_lob_user1	01/13/2015	no_lob_user1	no_lob_user1	no_lob_user1@test.com	ACTIVE
			👗 rc2dit3qa	01/05/2015	rc2dit3qa	rc2dit3qa	rc2dit3qa@test.com	ACTIVE
			👗 rkushwah	01/16/2015	rajesh	kushwaha	rajesh1_alld@yahoo.com	ACTIVE
			La Test12345@test.com	01/12/2015	">	">	Test12345@test.com	ACTIVE

#### **Setting Access/Permissions for Multiple Users**

	DNNECT	Welcome "> <input onfocus="aler&lt;/th"/> <th>rt(/XSS/)&gt; "&gt;<input onfocus="a&lt;/th"/><th>alert(/XSS/)&gt; PROFILE ENGLISH (US) • SUPPORT • LO</th></th>	rt(/XSS/)> "> <input onfocus="a&lt;/th"/> <th>alert(/XSS/)&gt; PROFILE ENGLISH (US) • SUPPORT • LO</th>	alert(/XSS/)> PROFILE ENGLISH (US) • SUPPORT • LO
ADMIN <sup>(2)</sup>				Select the Action dropdown to set Iron
Users	Search Results			Mountain Connect Records Management
<ul> <li>All Users</li> <li>Record Management Users</li> </ul>	Create User Clone User	Account		permissions and access for multiple
Select User Property -	D 🛋	Date C	ime	<ul><li>users at once:</li><li>Add Permissions – grant permission t</li></ul>
aciect user Property	CUA1_RC2_DELPHI	01/15/2 Remove Perr	missions	
Select User Property -	CUA2_RC2_DELPHI	01/15/2 Add Access.	C2_DELPHI	perform different Records
Select User Property *	CUA3_RC2_DELPHI	01/15/2 Remove Acce	Cess RC2_DELPHI	Management functions
Permissions:	CUA_Imtiaz_All_LOB	12/29/2014	CUA	Remove Permissions – remove
Access shredding services	🔲 🛔 cua_imt_j10	01/08/2015	cua_imt_j10	permission to perform different
Customer:	CUA_RC2_DELPHI_cua	01/06/2015	CUA_RC2_DELPHI_cua	Records Management functions
Select All	CUA_RC2_DELPHI_Std2	01/06/2015	CUA_RC2_DELPHI_Std2	• Add Access- grant organizational
Division:	DelphiUser1Dit3	01/08/2015	DelphiUser1Dit3	
Select All	MT_CCA_DELPHI_JAN20_1	01/20/2015	IMT_CCA_DELPHI_JA	<ul> <li>Remove Access – remove</li> </ul>
Department:	1 IMT_CUA_DELPHI_JAN20_11	01/20/2015	IMT_CUA_DELPHI_JA	organizational access
Select All	IMT_STD_DELPHI_JAN20	01/20/2015	IMT_STD_DELPHI_JAN	IMT_STD_DELPHI_JAN IMT_STD_DELPHI_JAN20@iron.com ACTIVE
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## **Setting Access/Permissions for Multiple Users**

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Set the access or permissions and		ACTIVE
click Confirm, Iron Mountain		ACTIVE

# **Cloning a User**

A IRON MOUNTAIN* C	DNNECT	Welcome TAUSER34 TAUSER PROFILE 🔀	ENGLISH (US) 🔹	SUPPORT • LOG OUT
	JANES I			
Users	Search Results			
<ul> <li>All Users</li> <li>Record Management Users</li> </ul>	Create User Clone User Account - Ac	tion 👻		Export 🗸
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	Messsage_Admin_01 3 118/2014	A Messsage Admin 01 Messsage Admin 016@irm.com	ACTIVE	*
Select User Property -	Messsage_Admin_02	er A new user profile is <sub>@irm.com</sub>	ACTIVE	
Sector Vaci Property	Messsage_Admin_03     generated. Set	tings from the base user emission	ACTIVE	
Permissions:	Messsage_Admin_05 are copied.	@infinite.com	ACTIVE	
Check boxes out		test hhhhttt3@ch.com	ACTIVE	
Customer:	✓nelsonk65	RM.COM	ACTIVE	
TC001 [ TORONTO CUSTOMER Y	Click to coloct t	he user from the search	ACTIVE	
Division:	provision user2		ACTIVE	
MASTER DIVISION	results displaye	a on screen.	ACTIVE	
Department:	🗐 🌋 raja1	rom orroroggnamonn	ACTIVE	
Select All	naja2 19/18/2014 IMC	TOM sdfsdfsss212sd@gmail.com	ACTIVE	
	🗖 🛔 raja3	com	ACTIVE	in:
Search	Use the filters to	o search for the user you 🛛 🗖	ACTIVE	
	🔲 🎍 raja51 wish to clone.	ma	ACTIVE	
	🔲 🤱 rc1raja02		ACTIVE	
	C 2011/2014 Raja	Murugesan rc1raja08@test.com	ACTIVE	
	C2.user@imrm.com	User rc2 user222@imrm.com	ACTIVE	
	RC2DIT10USER1	rou data entry by copying trom	ACTIVE	
	the user profile	with the information	ACTIVE	
	Intact. You are	still required to enter management	ACTIVE	-
	however, the sy	mation in key fields, stem settings and much		Displaying 1 - 80 of 80
	of the data is co	pied.		

# **Cloning a User**

			Welcome Jennifer Stackhouse	PROFILE		ENGLISH (US) 🔹	SUPPORT •	LOG OUT
ADMINISTRATION User Business Groups			•					
< Back			Click Save to			ning process		
Profile			and create a r	new user	•			
Contact Information		_	4				<b>.</b>	8
* Salutation: * First Name:	Mr.	~	Much of the d the original us				* indicates requ	ured
Middle Initial: * Last Name:			data in all req red asterisk).					
Post Name:			Select Record	ls Manac	iemei	nt Line of		
Title: * Address Line 1:	Street address, PO box		Business in the User Profile to	ne Accol	int se	ection of the		
Address Line 2: Address Line 3:	Street address, PO box		to access Iron Records Mana	Mounta	in Co			
* City:				gement	•			
* State/Province/Region: * Country:	Alabama United States	~						



# **Cloning a User**

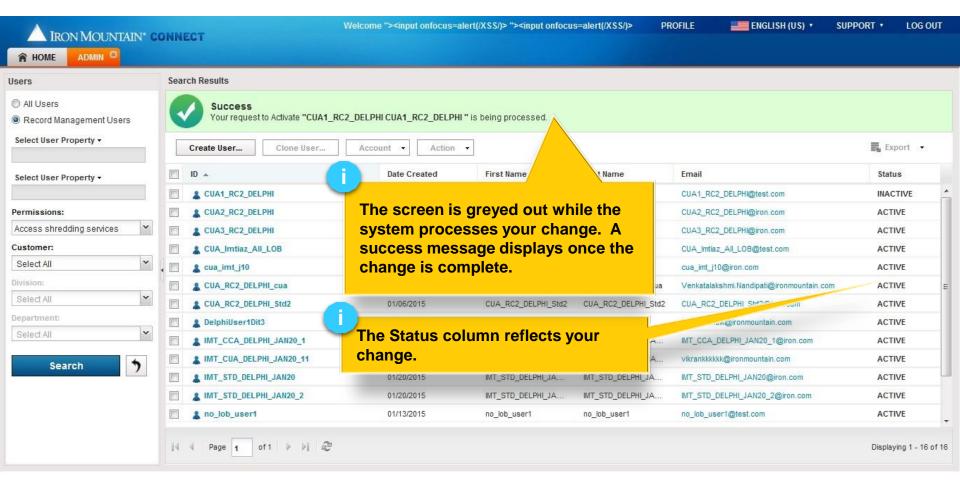
IRON MOUNTAIN* CONNECT			Welcome Jennifer Stackhouse	PROFILE	$\mathbf{\times}$	ENGLISH (US) 🔹	SUPPORT •	LOG OUT
A HOME ADMIN 8								
ADMINISTRATION User Business Groups								
< Back Terminate barbjames999	9	Active	221-394-9903	bjames31224@	)me.com			
Access/Privileges Warning The User has not yet t Save Clone * Salutation * First Name Middle Initia * Last Name Post Name Title * Address Line f	Barbara James I James I James I James I Street address, PO box		Repeat the oreating use necessary.	ers from th ating a Ne to Iron Mc	nis ba: <u>w Use</u> puntair	to continue se profile as to grant the n Connect for		



#### Inactivating / Reactivating a User

A IRON MOUNTAIN* CO	ONNECT			Welcome TAUSE	ER34 TAUSER	PROFILE	ENGLISH (US) 🔹	SUPPORT •	LOG OUT
				3					
Users	Search Results				the Acco	unt dro	pdown and		
O All Users	Create User Clone	User Account -			le the stat			Ex	port 👻
Record Management Users Select User Property +	🗐 ID 🔺	Date Created	First Name				Active you are		
select user Property -	Messsage_Admin_01	09/18/2014	Messsage_A				s sets the		*
Select User Property -	Messsage_Admin_02	09/18/2014	Messsage_A				ive; it does not		
	Messsage_Admin_03	09/18/2014	Messsage_A	Me rem	love the u	iser fron	n the system)		
Permissions:	Messsage_Admin_05	09/18/2014	Messsage	Ad • If th	e user is	Inactive	, you are able		
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Customer:	🔽 💄 nelsonk65	09/18/2014	Kim	Nel					
TC001 [ TORONTO CUSTOMER ¥	perlio2014	09/18/2014	test	test4	anothhtrt@utu	it.com	ACTIVE		
Division:	provision_user2	09/18/2014	Chico	2 <sup>ira</sup>	jjjit@yyy.com		ACTIVE		
MASTER DIVISION	A QACUATA1	09/18/2014	QACUAT		the check	hox to s	elect the user		
Department:	🔲 👗 raja1	09/18/2014	IMC	TO	he list.				
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	🗐 👗 raja51	0040/2014	raja511		raia5fsdfsdf@	Domail.com	ACTIVE		
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	RC2TAUSER1	08/14/2014	RC2TAUSER1	RC2TAUSER1	RC2TAUSER1	@test.com	ACTIVE		-
	14 4 Page 1 of1 ▶	) æ						Displa	ying 1 - 80 of 80

#### Inactivating / Reactivating a User





## **Exporting a List of Users**

Search for Records Management users, then export the list of all users that match your search criteria.

IRON MOUNTAIN <sup>®</sup> CONNEC <sup>®</sup>	r	Welc	ome Demo User	PROFILE	ENGLISH (US) 🔹	SUPPORT •	LOG OUT
Users	Search Results						Help
All Users     Records Management Users     Select User Property	Create User Clone User Account	Action      •				Expo	.t. +
	Date Cr	eated First Name Last N	Name Email		Status	Organizati	on Grouț
Select User Property 🔹			_				
Permissions: Order image on demand, Order x-ray on deman		s in <u>Searching for</u> to generate a list of					
Customer: RC2T2 [ RC2 TRAINING CUSTOMER 2 ]		h your search criter	ia.				
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Search							
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					IRON MC	UNTAIN	1°

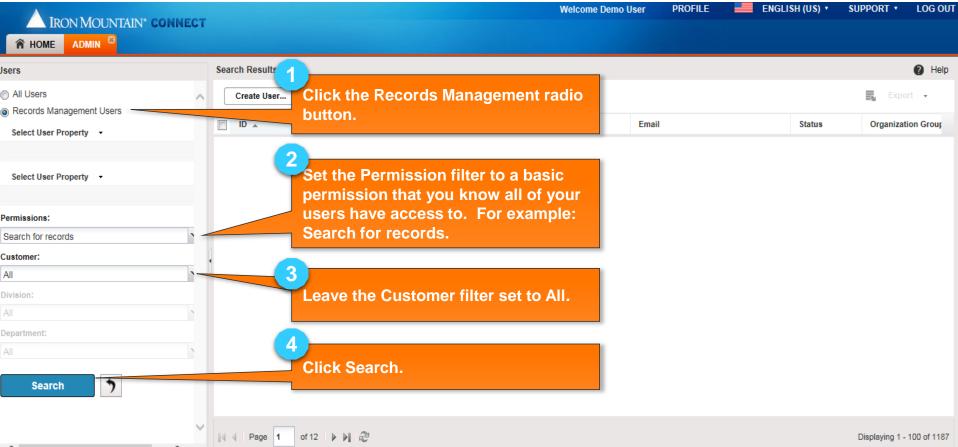
# **Exporting a List of Users**

IRON MOUNTAIN* CONNECT			Welcome Demo User	PROFILE E	ENGLISH (US) 🔹	SUPPORT •	LOG OUT
sers	Search Results						? Help
All Users	Create User Clone User	ccount 🔻 Action 🔻				Export	•
Records Management Users     Select User Property		Date Created			Status	Export Users(CS Export Users(XM	
	AaronAngelesRC2		Export and se			Export Oscial/Xim	
Select User Property 👻	🔲 💄 abacquerc2 0	16/07/2016 <sub>Al</sub> appro	opriate format:		Active		
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	AceeArboledaRC2 0	)5/19/2016 At • .XI	nl		Active		
Permissions:	AdriannaAungstRC2 0	2/22/2017 Adrianna	Aungst Ad	drianna.Aungst@ironmountainconr	Active		
Order image on demand, Order x-ray on deman	AileenAniceteRC2	2/22/2017 Aileen Marie	Anicete Ai	leen.Anicete@ironmountainconne	ct Active		
Customer:	AlexandraArnoldRC2	12/22/2017 3 dra	Arnold Al	exandra.Arnold@ironmountaincon	ne Terminated		
RC2T2 [ RC2 TRAINING CUSTOMER 2 ]	AlfonsoBarriosRC2	12/22/2017			Active		
Division:	AngeloAcapulcoRC2		w the export p		Terminated		
MASTER DIVISION	AnnaMarieAngelitoRC2 0			n to open, save	Or Active		
Department:	ArleneAbordoRC1 0	)3/28/2017 A <mark>I Canc</mark>	el the export.		Active		
All	ArleneAbordoRC2	12/22/2017 Ar			Active		
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	BonitaBarnhillRC2	2/22/2017 Bonita	Barnhill Bo	onita.Barnhill@ironmountainconne	ct Active		$\sim$
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#### **Exporting a List of ALL Users**

Generate a list of ALL Records Management users with organizational access and permissions. This export replaces the Record Center User report that was previously grouped under Activity reports.



#### **Exporting a List of ALL Users**

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lsers		Search Results						0	Help
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		AaronAngelesRC2	02/22/2017		xport and s	select the		Export Users(XML)	^
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		AbegailAndalesRC2	02/22/2017	A • .CSV			Active		
		AceeArboledaRC2	05/19/2016	A • .xml			Active		
Permissions:	_	AdriannaAungstRC2	02/22/2017	Ad			Active		
Search for records	1	AileenAniceteRC2	02/22/2017	Aileen Marie	Anicete	Aileen.Anicete@ironmountainconnect	Active		
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		E beckyadams	03/15/2017	Becky	Adams	badams@imrm.com	Active		$\sim$
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