IRON MOUNTAIN CONNECT™ RECORDS MANAGEMENT SHIPPING ADDRESS QUICK START GUIDE

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Document/File information

Iron Mountain Connect Records Management
Shipping Address Quick Start
March 2019

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Contents

INTRODUCTION **4**
Where Can I Find My Personal Address Book? 4
Why Was Address Functionality Changed? 4
SYSTEM ADMINISTRATOR SECTION **5**
Where Can I Find the New Address Functionality? 5
What If I Cannot Find Old Addresses? 5
Address Access Info 9
What if I See Outdated Addresses? 9
Can Users Create Addresses? 12
USER SECTION **13**
Where Can I Find the New Address Functionality? 13
How Do I Set Default and Favorite Addresses? 18
What If I Cannot Find An address? 19
FURTHER ASSISTANCE 19

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INTRODUCTION

The personal address book has been replaced with improved centralized address functionality that system administrators control.

WHERE CAN I FIND MY PERSONAL ADDRESS BOOK?

- Personal address books have been removed.
- System administrators now create, edit and delete addresses, and enable/disable user access to addresses from within **Records Management | Administration | Manage Addresses**.
- Users review and select an address from within the Details step in the order wizard.
- Users with the proper permissions are able to create addresses while placing orders.
    - Once an address is created, it is available for use and can be set as a default address or favorite address by a user for ease of use.

WHY WAS ADDRESS FUNCTIONALITY CHANGED?

- Multiple address repositories led to inconsistency and errors.
- One centralized repository means addresses are synchronized SYSTEM-WIDE.
- Default and favorite addresses automate processes and eliminate errors.
- Simpler workflow.
- Less time spent looking up and copying addresses to the personal address book.

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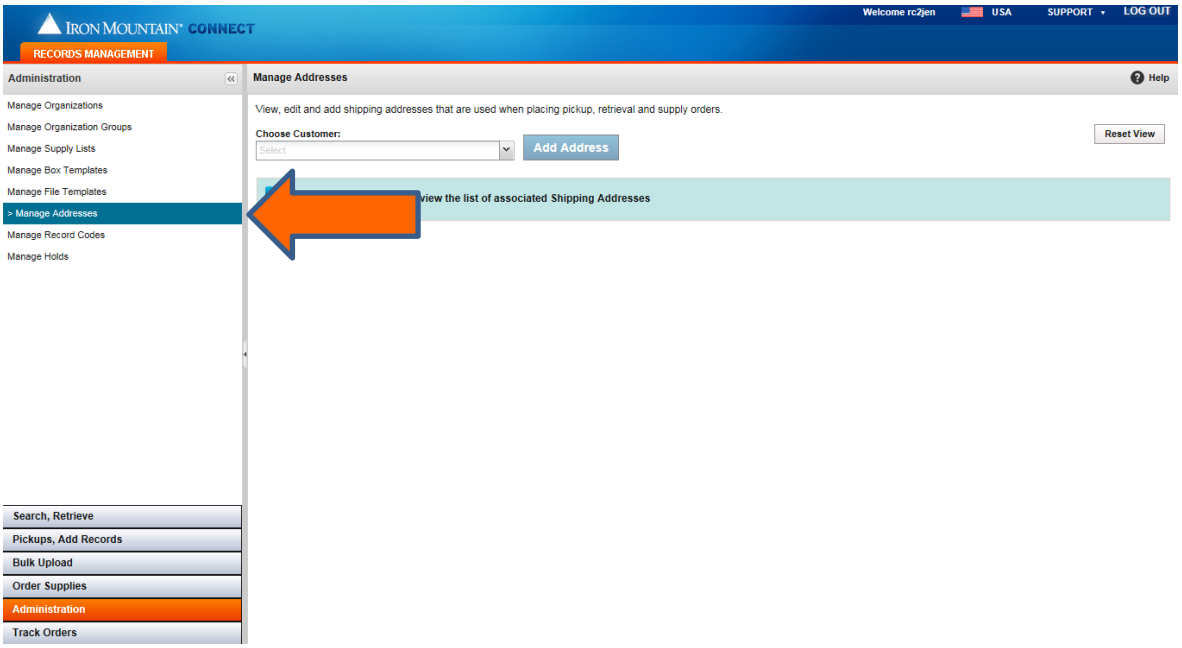
SYSTEM ADMINISTRATOR SECTION

WHERE CAN I FIND THE NEW ADDRESS FUNCTIONALITY?

System administrators now create, edit, delete and enable user access to addresses from within **Administration | Manage Addresses**.



WHAT IF I CANNOT FIND AN ADDRESS?

If you cannot find an address that existed in a personal address book in Record Center, you have two options:

- **FILTER**: Apply column FILTERS to reduce the number of addresses displayed:
  1. Select **Records Management | Administration | Manage Addresses**.
  2. Select a customer.
  3. Enter a keyword from the address in one or more of the column filter fields.
  4. Click **Filter**. Addresses that match your criteria display.

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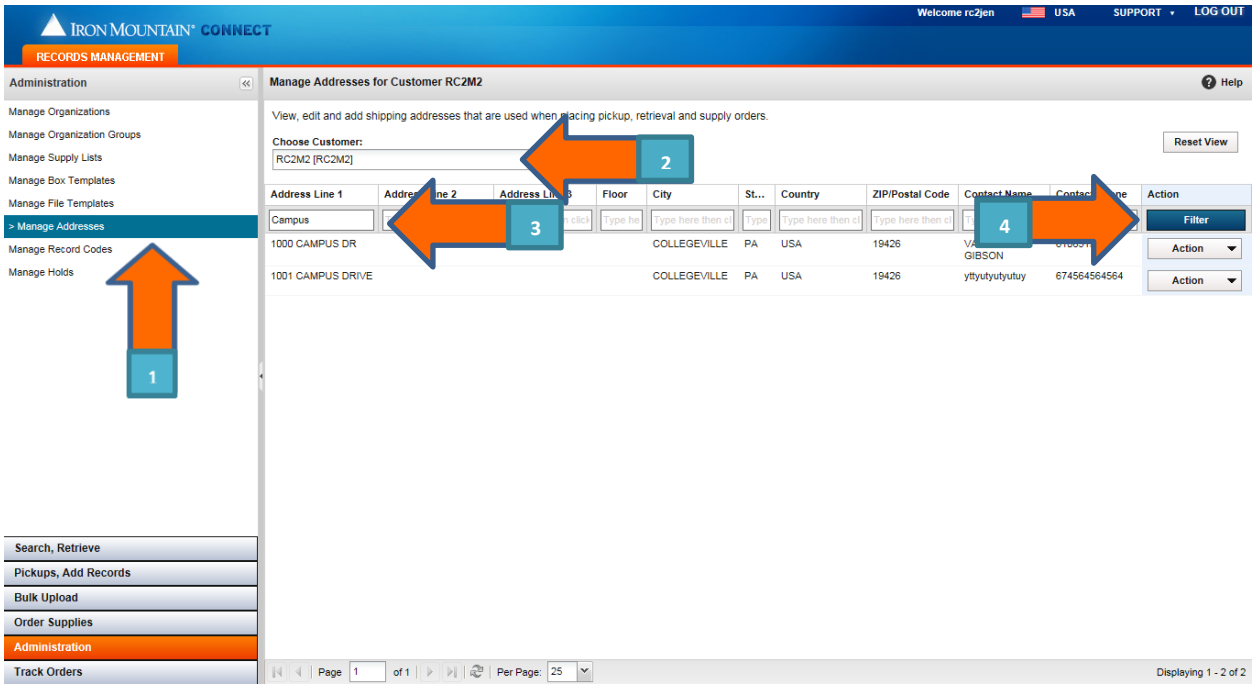

- **CREATE**: Create any addresses that your search does not find:
  1. Select **Records Management | Administration | Manage Addresses**.
  2. Select the Customer.
  3. Click **Add Address**. The shipping address wizard opens.
  4. Enter all required shipping address details.
  5. Click **Choose Users**.

NOTE: If a standard user needs access to the same address for different customers, system administrators use the steps above to manually create the address in each customer record.

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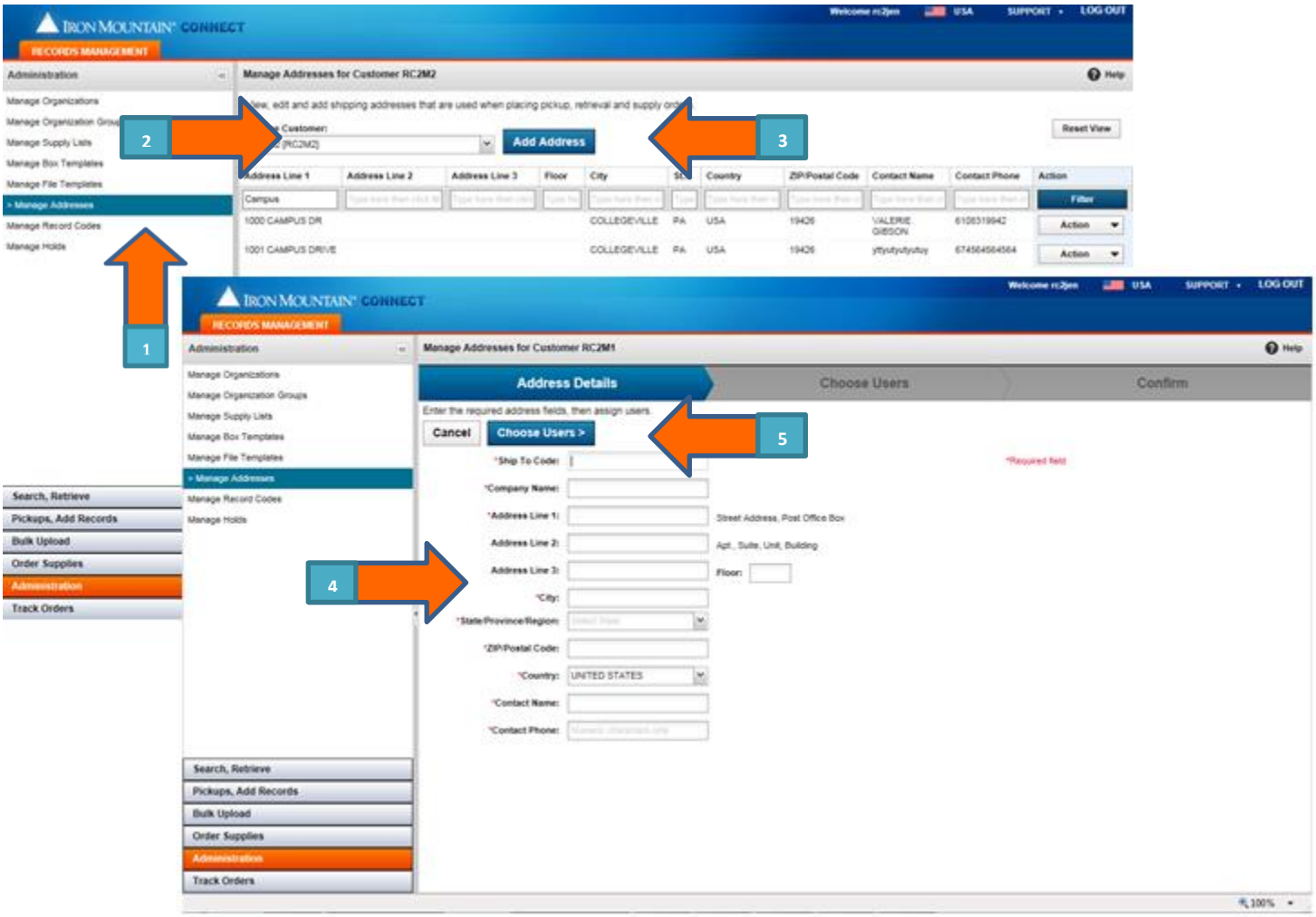

6. Control which users will see and use this address when ordering:

- ☑ Allow user to see and use this address
- ☐ Restrict user from seeing and using this address

By default, all users are granted access to ALL new addresses unless the system administrator manually deselects the user during this step.

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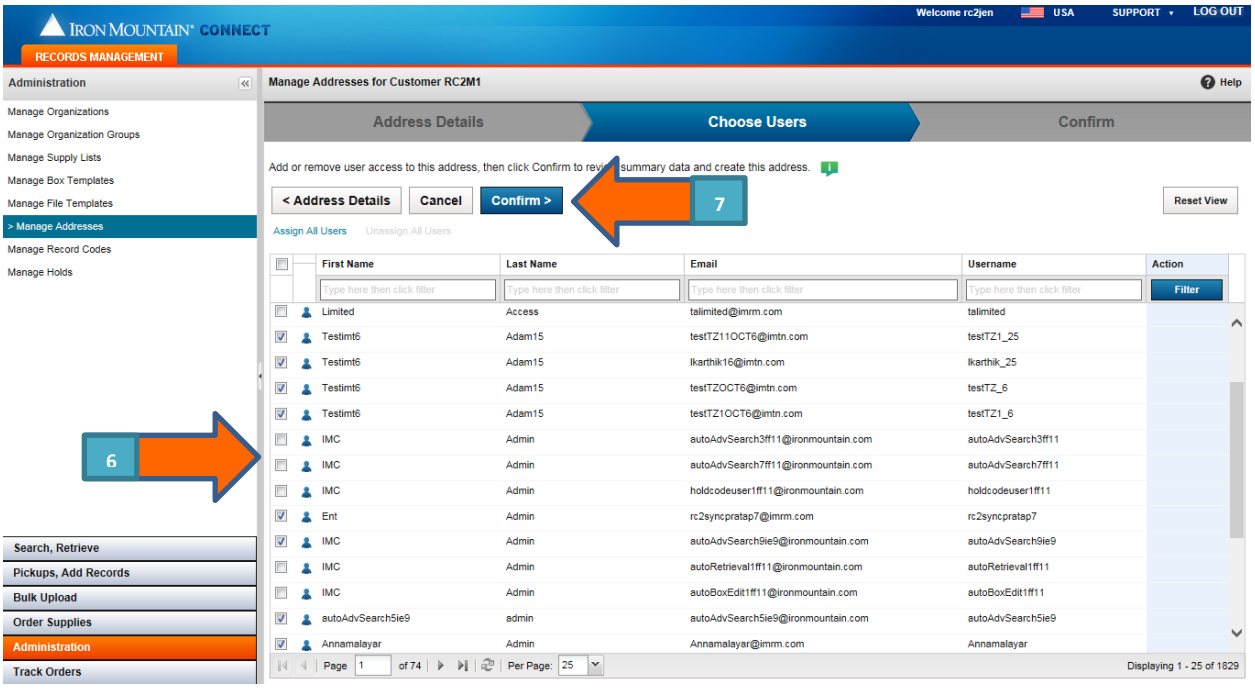

TIP: Use the **Assign All Users** or **Unassign All Users** link to update users in bulk.

7. Click **Confirm**, and then **Finish**.

NOTE: There may be a short delay before new addresses display on the Shipping Address List screen.

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ADDRESS ACCESS INFO BY ROLE

Administrators:

Automatically have access to all addresses for the companies they are assigned to.

Standard Users:

- **New address**: Standard users are automatically granted access to new addresses. As a system administrator, you must manually deselect a user that should not have access to a new address.
- **Existing address**: Standard users do not automatically receive access to existing addresses. As a system administrator, you must review the addresses and 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.

WHAT IF I SEE OUTDATED ADDRESSES?

As a system administrator, if outdated shipping addresses display, you have two options:

- **EDIT: Edit the address** and unassign all users associated with it. The address remains in Iron Mountain Connect Records Management; however, users no longer see the outdated address.

1. Select **Edit** from the **Action** dropdown to the right of the address.

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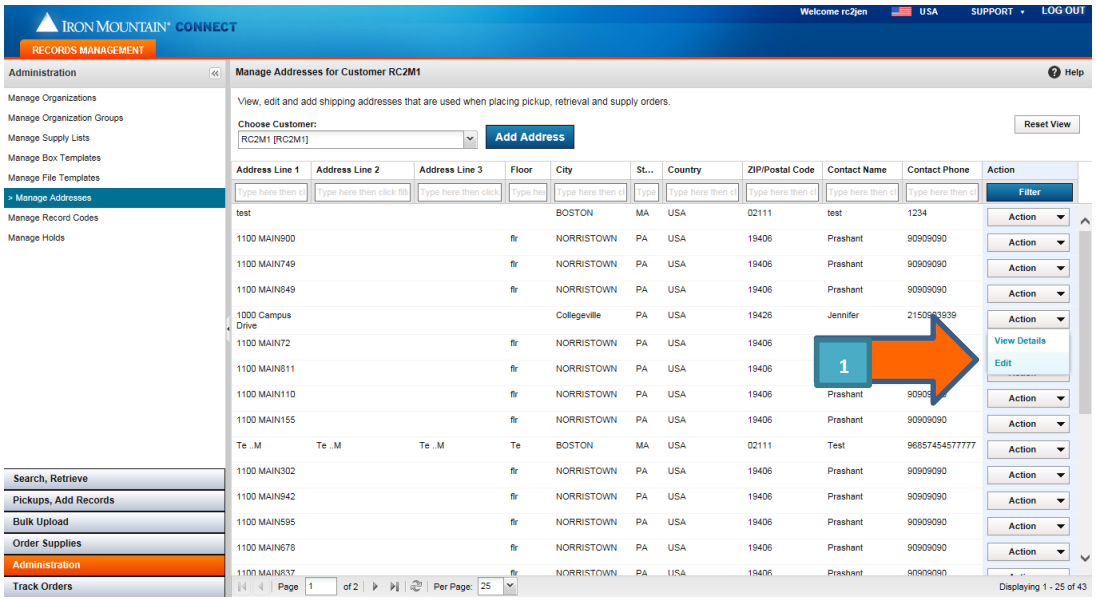
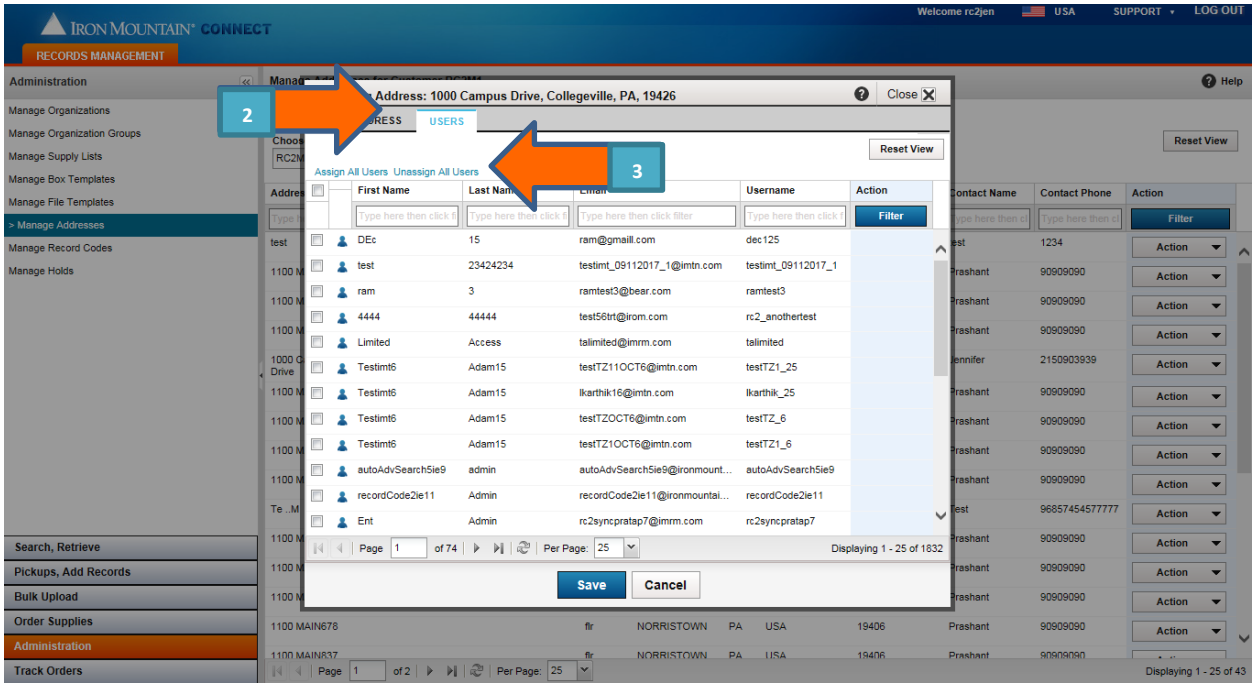


2. Click the Users tab.
3. Click the **Unassign All Users** link. Users will no longer see this address.



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- **REMOVE: Remove the address**. Be aware that removing an address will permanently delete the address. No backup or audit records will be available. Only System Administrators can remove an address.

    1. Select **Records Management | Administration | Manage Addresses**. The Manage Addresses screen opens.
    2. Select **Remove** from the **Action** dropdown to the right of the shipping address you need to delete.
    3. Click **Remove** to confirm that you wish to remove the shipping address. The address is removed from Iron Mountain Connect Records Management.

    Users who place phone orders rather than using Iron Mountain Connect Records Management may experience a temporary delay before the address is removed.

    You CANNOT remove a shipping address if:

    - 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

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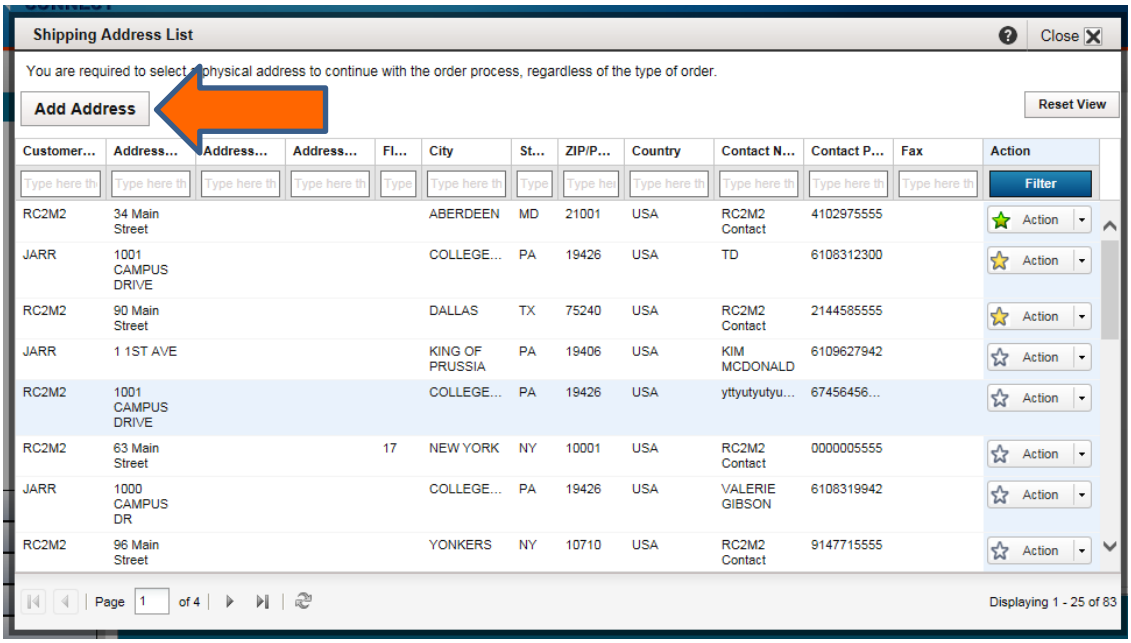
CAN USERS CREATE ADDRESSES?

System administrators can enable users to create and edit addresses – and assign users to the addresses - on the fly while placing an order.

1. Check the **Create / edit shipping address** user permission on the System Permissions screen in Manage Users.
2. Users with this permission will see the Add Address button on the Shipping Address List screen. Users without this permission will not see this button.



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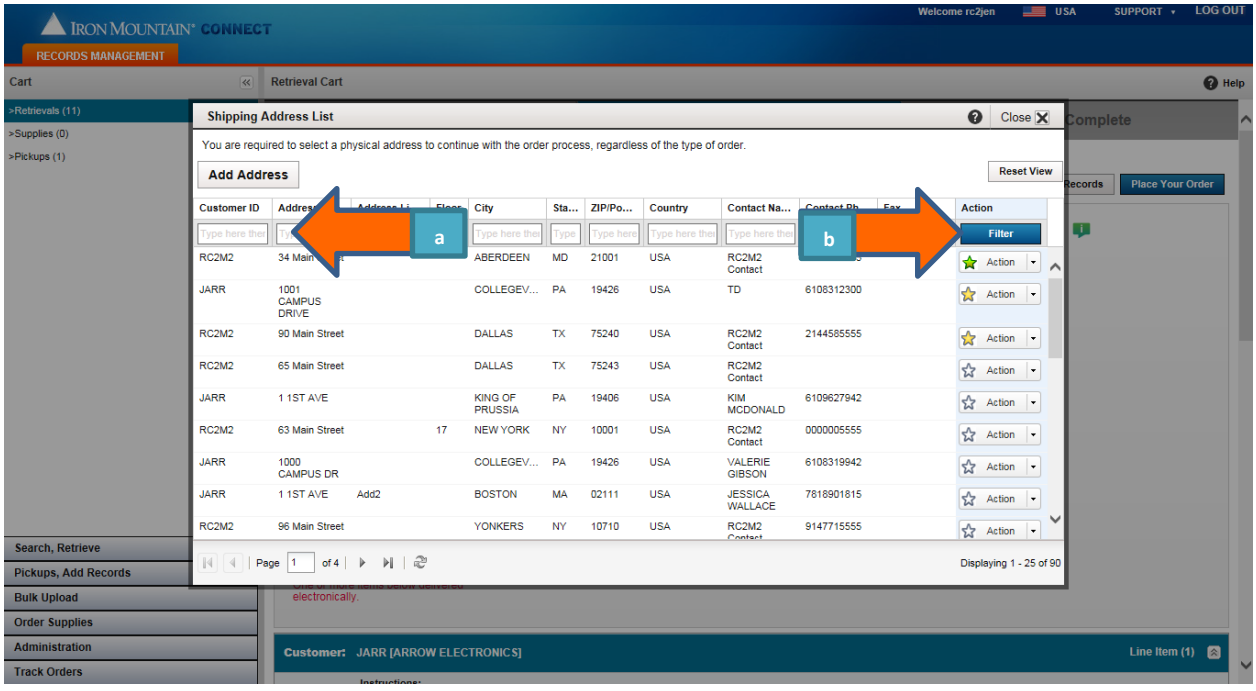
USER SECTION

WHERE CAN I FIND THE NEW ADDRESS FUNCTIONALITY?

Users review, select or enter an address from within the Details step in any order wizard.

First Time Users / Users Who Have Not Set a Default Address

1. If you have not set a Default address, the Shipping Address List screen opens every time you get to the Details step in the order process.
2. Select an address.
3. If you cannot find an address, apply column FILTERS to reduce the number of addresses displayed.
    a. Enter a keyword from the address in one or more of the column filter fields.
    b. Click **Filter**. Addresses that match your criteria display.



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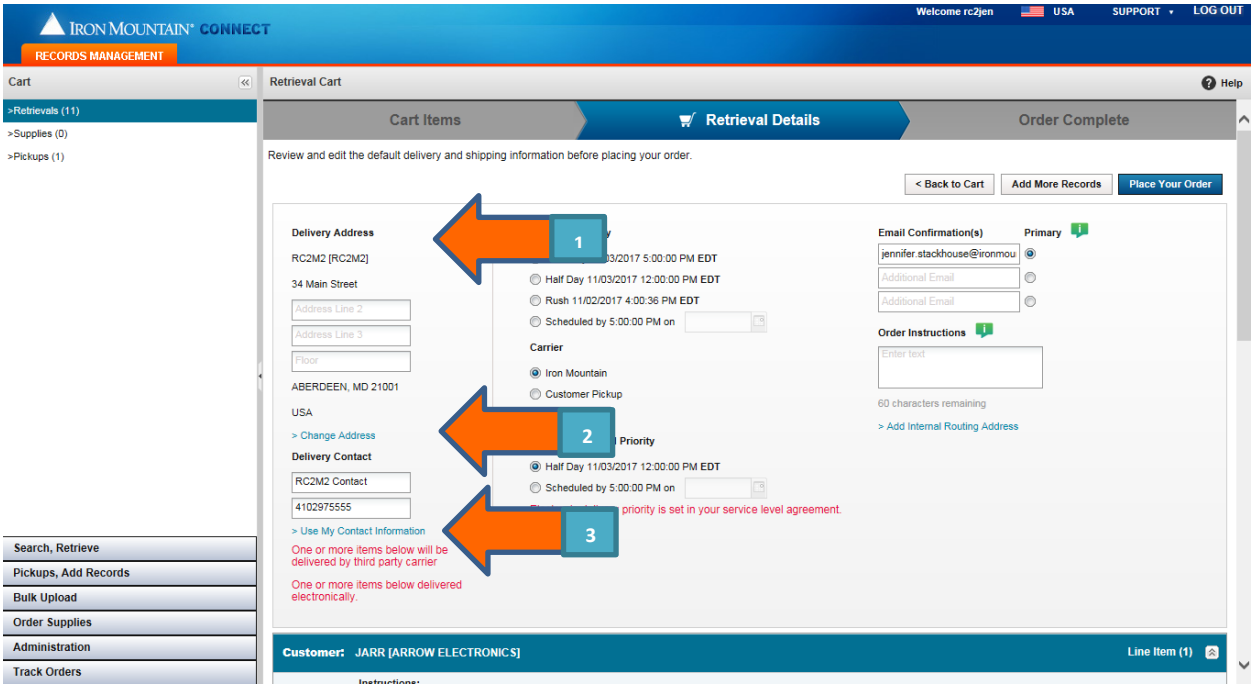
Users Who Have Set a Default Address

1. If you have set a Default address, it displays on the Details screen. Enter additional information in the address fields if you have it.
2. To select a different address, click the **>Change Address** link, then select an address from the Shipping Address list screen.
3. To use contact information from your user profile, click the **>Use My Contact Information** link.



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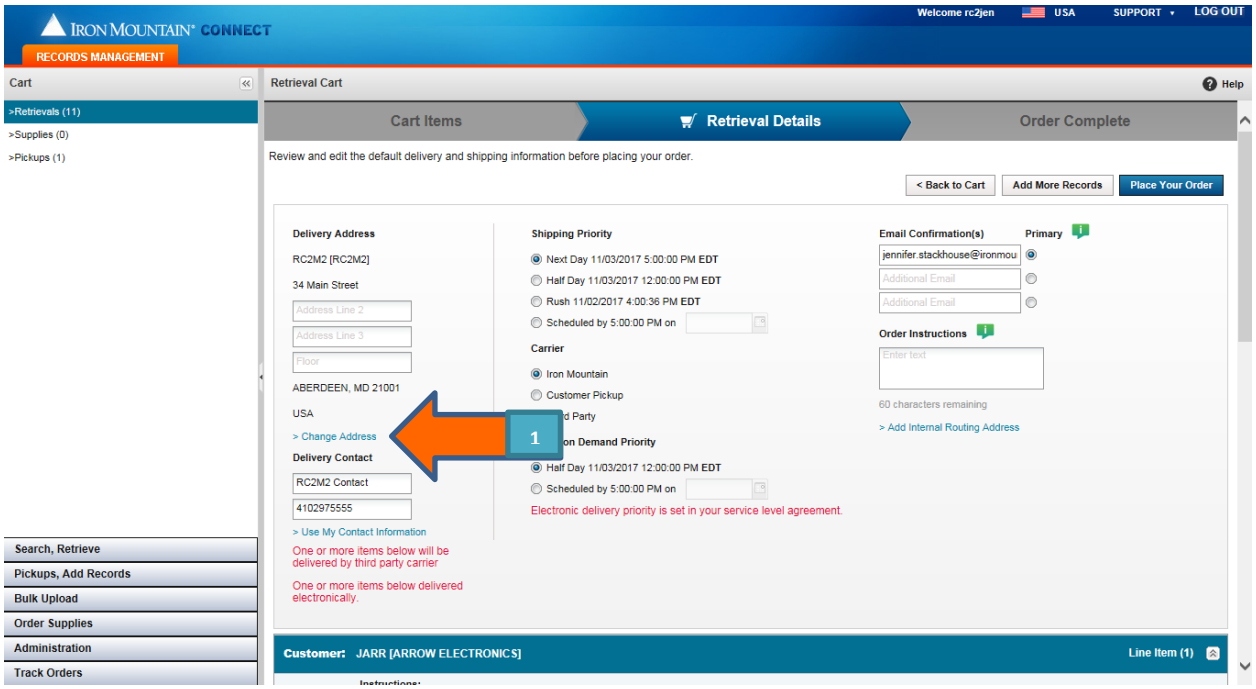
Users Who Can Create Addresses

If your system administrator has enabled you to create and edit addresses, the **Add Address** button is on the Shipping Address List screen.

1. Click the **<Change Address** link from the Details step in the order wizard to open the Shipping Address List screen.



2. Click **Add Address**.

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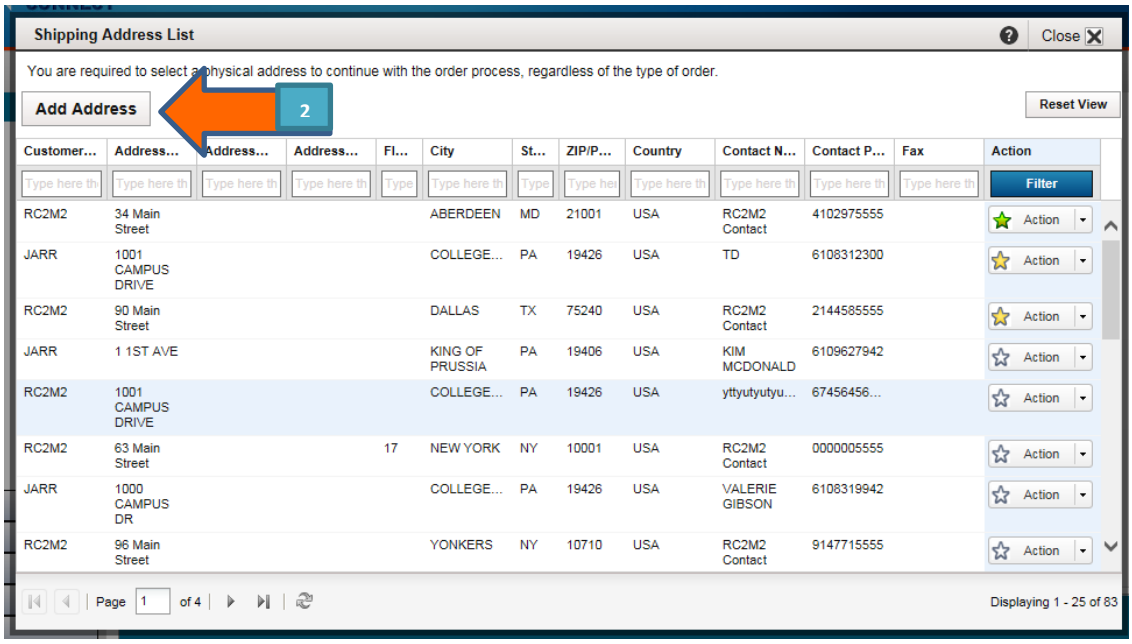
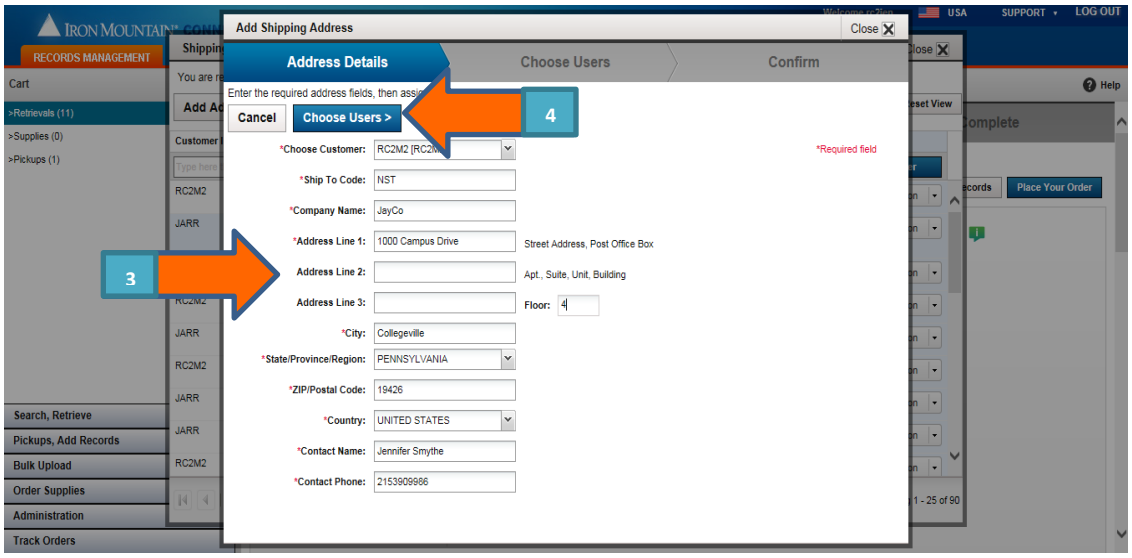


3. Enter all required shipping address details.



4. Click **Choose Users**. Control which users will see and use this address when ordering:
   - ☑ Allow user to see and use this address
   - ☐ Restrict user from seeing and using this address

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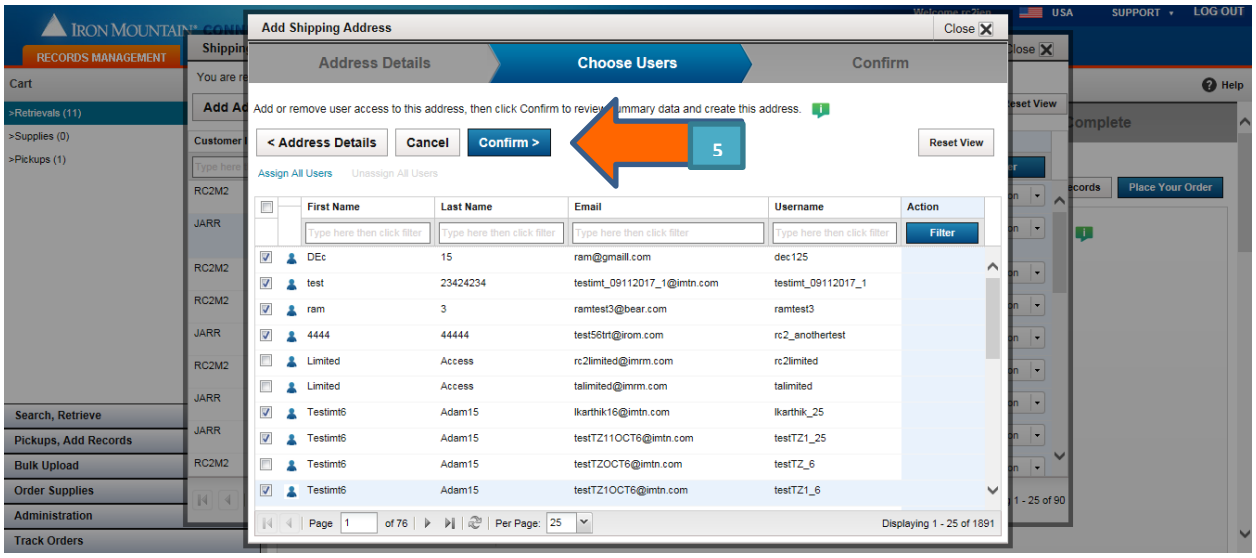

TIP: Use the **Assign All Users** or **Unassign All Users** link to update users in bulk.

By default, all users are granted access to ALL new addresses unless you manually deselect the user during this step.

5. Click **Confirm**, and then **Use This Address**.

NOTE: There may be a short delay before new addresses display on the Shipping Address List screen.

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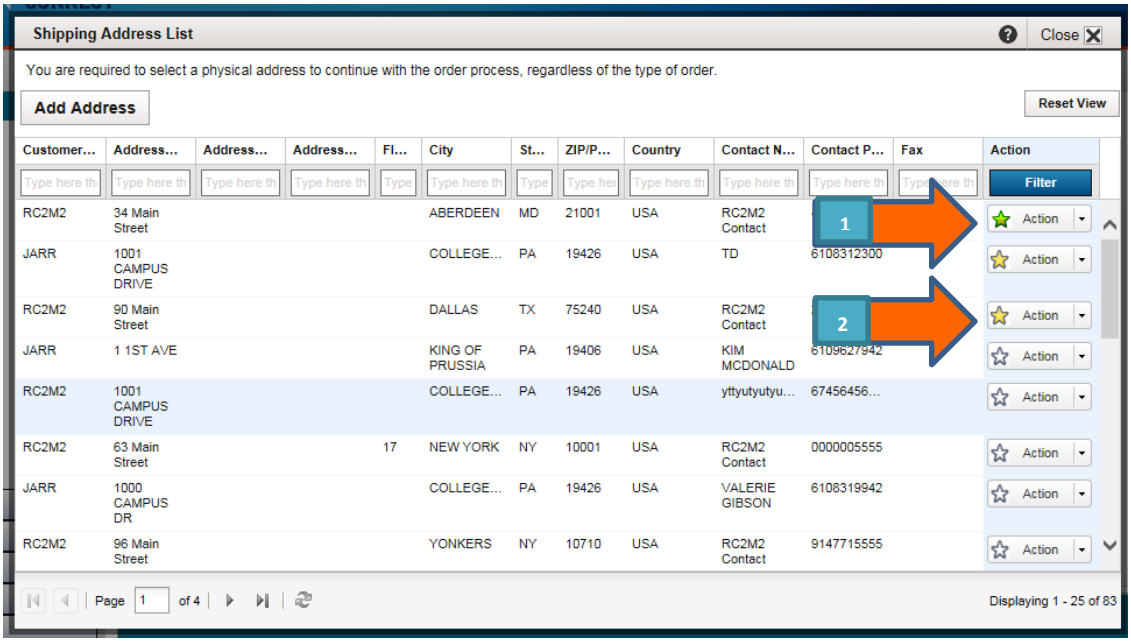
HOW DO I SET DEFAULT AND FAVORITE ADDRESSES?

Users set Default and Favorite Addresses from the Shipping Address List screen.

The Shipping Address List screen opens automatically each time a user places an order UNTIL a Default address is set.



Customer...	Address...	Address...	Address...	Fl...	City	St...	ZIP/P...	Country	Contact N...	Contact P...	Fax	Action
RC2M2	34 Main Street				ABERDEEN	MD	21001	USA	RC2M2 Contact			Action
JARR	1001 CAMPUS DRIVE				COLLEGE...	PA	19426	USA	TD	6108312300		Action
RC2M2	90 Main Street				DALLAS	TX	75240	USA	RC2M2 Contact			Action
JARR	1 1ST AVE				KING OF PRUSSIA	PA	19406	USA	KIM MCDONALD	6109627942		Action
RC2M2	1001 CAMPUS DRIVE				COLLEGE...	PA	19426	USA	yttyutyutyu...	67456456...		Action
RC2M2	63 Main Street			17	NEW YORK	NY	10001	USA	RC2M2 Contact	0000005555		Action
JARR	1000 CAMPUS DR				COLLEGE...	PA	19426	USA	VALERIE GIBSON	6108319942		Action
RC2M2	96 Main Street				YONKERS	NY	10710	USA	RC2M2 Contact	9147715555		Action

Page 1 of 4 | Displaying 1 - 25 of 83

1. **Default Address:**
   - Marked with green star
   - One default address
   - Automatically populates the address fields in the Detail step when placing an order
   - Displays at top of Shipping Address screen

2. **Favorite Address:**
   - Marked with gold star
   - Multiple favorite addresses
   - Displays at the top of the Shipping Address screen, or directly below the default address if a default address has been set

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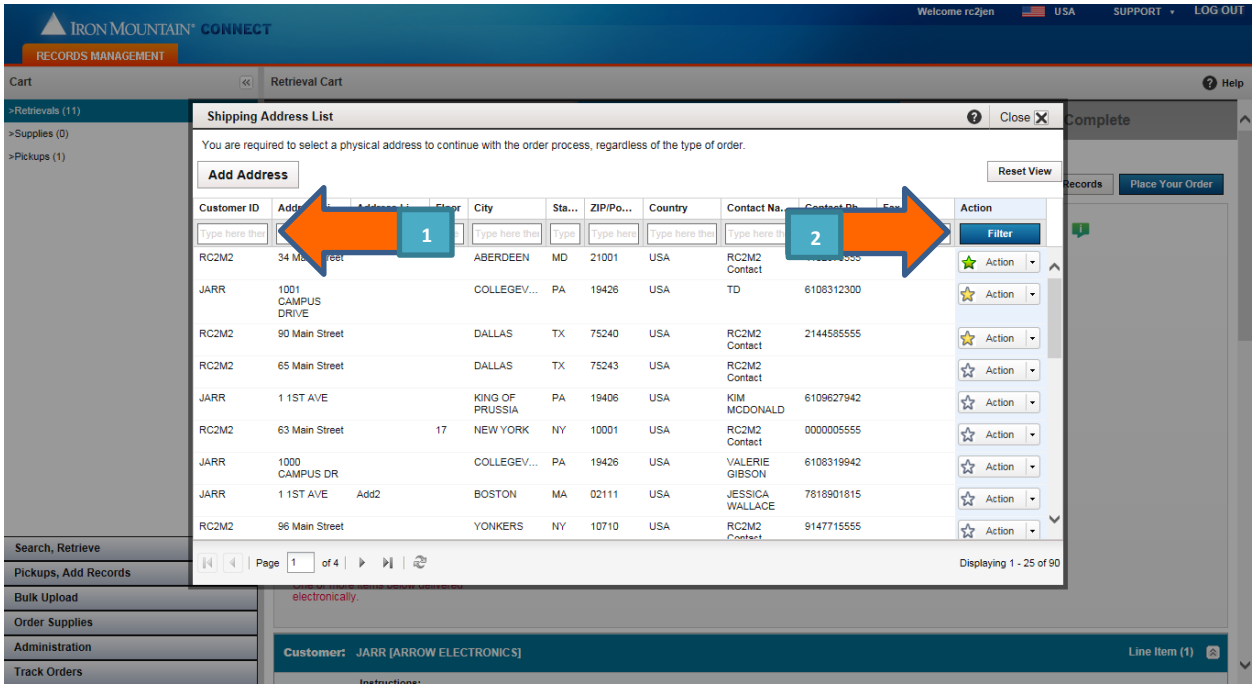
- Used to organize the address list; quickly find favorite addresses near the top of the address list

WHAT IF I CANNOT FIND AN ADDRESS?

If you cannot find an address, apply column FILTERS to reduce the number of addresses displayed.

1. Enter a keyword from the address in one or more of the column filter fields.
2. Click **Filter**. Addresses that match your criteria display.



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