



Advanced Search

**IRON MOUNTAIN CONNECT™
RECORDS MANAGEMENT**



Advanced Search

Advanced Search is an intuitive, easy to use tool. It enables you to build a search that is more targeted and precise than in basic Search. Each advanced search can contain both **filters AND criteria**:

- Criteria are custom queries that you build with fields, rules, values and operators that you select. Your search narrows with each criteria that you add.
- Your Advanced Search settings are saved during your user session, and you can view and edit the settings to further tailor your search.
- Use this guide to learn how to:
 - [Create an Advanced Search](#)
 - [Set Search Filters](#)
 - [Build Search Criteria](#)
 - [Review and edit your advanced search settings](#)
 - [Export your advanced search results](#)

Creating an Advanced Search

IRON MOUNTAIN® CONNECT

RECORDS MANAGEMENT

Welcome rc2jen USA SUPPORT LOG OUT

Retrievals (1)

Search Search Tools Search Results

Multi-Box Search

Advanced Search

Record Type: All Boxes Files

Customer: All

Division: All

Department: All

Status: All

File Group: Select

Search

Action Request Unlisted Open Shelf File

Reset View Export

Enter keywords and set filters, then click Search to view the list of matching records.

2 Select Advanced Search from the Search Tools dropdown.

1 Select Search, Retrieve from the Left-Side Navigation bar.

Search, Retrieve

Pickups, Add Records

Order Supplies

Administration

Track Orders

Creating an Advanced Search: Setting Filters

- 4** Set filters to narrow your advanced search:
- Select one or more Customers, Divisions and Departments. Filter options change if you use multi-select functionality and if the customer is division- and department-enabled.
 - Select one or more Statuses.
 - If you organize open shelf files by file group, select a File Group.
 - Organizations that use Iron Mountain Connect Records Management to calculate retention can enter or look up one or more Record Codes.
 - Organizations that use hold codes to prevent record destruction can enter or look up one or more Hold Codes.

3 Select the type of record you are searching for.

The screenshot shows the 'Advanced Search' window. At the top, there are navigation links: 'Welcome rc2jen', 'USA', 'SUPPORT', and 'LOG OUT'. The main area is titled 'Advanced Search' and contains a 'FILTERS' section with the instruction: 'Select filters to find matching records based on filter settings only, or add up to five search criteria to build logic into your search.' Below this, there are several filter fields: 'Record Type' (radio buttons for All, Boxes, Files; 'All' is selected), 'Include Inactive' (checkbox, checked), 'Customer' (text input with 'ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]'), 'Department' (dropdown with 'All'), 'Status' (dropdown with 'All'), 'File Group' (dropdown with 'All'), 'Record Code' (text input with 'EDM [EDM]'), and 'Hold Code' (dropdown with 'All'). Below the filters is a 'CRITERIA' section with the instruction: 'Narrow this search by adding up to five search criteria. Search criteria limit your searches and produce more precise results. See the Online Help for more information.' It features a table with columns 'Field', 'Rule', and 'Value', and an 'Add' button. At the bottom, there are 'Search', 'Reset', and 'Cancel' buttons.

i The Customer, Division and Department fields have type-ahead functionality. As you type, Iron Mountain Connect Records Management displays all matching records.

i The Advanced Search entry filter fields (Customer, Division, Department, Status and File Group) contain multi-select functionality. You are easily able to select one, many or all entries.

i Records from inactive organizations are included in your search results. Deselect the Include Inactive checkbox to exclude these records from your search results

Creating an Advanced Search: Building Search Criteria

5 Add up to five criteria to your advanced search:
Field + Rule + Value = Search Criteria

1 Example: Let's build and join two criteria that will find records created between January 2015 and January 2016

2 Build your first criteria:

- Set Field to *Create Date*
- Set Rule to *Equal or after*
- Set Value to *January 1, 2015*

6 Click Search.

3 Click **+** Add to join a second set of criteria:

- Set Field to *Create Date*
- Set Rule to *Equal or before*
- Set Value to *January 31, 2016*

i Criteria are custom queries that you build with fields, rules, operators and values, then attach to an advanced search. Each advanced search can have up to five criteria attached.

i Operators join sets of criteria together:

- **AND:** Find records containing all criteria
- **OR:** Find records containing any of the criteria
- **NOT:** Exclude records from the search

Viewing Results & Editing Settings

The screenshot displays the Iron Mountain Connect Records Management interface. At the top, the user is logged in as 'rc2jen' and the system is set to 'USA'. The main navigation bar includes 'RECORDS MANAGEMENT' and a search bar. The search results section shows '7 Search Results' and a table of records. An 'ADVANCED SEARCH SETTINGS' banner is visible, with a callout box (4) pointing to it. A callout box (7) points to the 'ADVANCED SEARCH SETTINGS' link in the banner. A callout box (4) points to the search results table. A callout box (7) points to the 'ADVANCED SEARCH SETTINGS' link in the banner. A callout box (4) points to the search results table. A callout box (7) points to the 'ADVANCED SEARCH SETTINGS' link in the banner. A callout box (4) points to the search results table.

4 Records created between January 1, 2015 and January 31, 2016 are listed.

7 Click the link provided in the banner message to view and/or edit your advanced search.

4 You are able to customize the Search Results screen as follows:

- Sort columns
- Change column width
- Drag and drop to re-order columns
- Restore screen to its default state
- Hide the left-side search bar
- Filter within a column
- Page through results
- Change the number of results displayed
- Add and remove columns

Refer to the Searching How To training guide for information on these features.

System Type	SKP Barcode	Customer	Division	Department	Customer Box Number	Create Date	Status	Action
FILE	11198565-1	RC2M3 [RC2M3]	Customer Not Division-Enabled	MASTER DEPARTMENT	8117689			
BOX	12021	JSRC2 [SRVC CF,BC=B,RMT=5]	DIVONE [DIVISION ONE]	LAW [DIVISION ONE, LAW FORMAT]	12021			
BOX	12025	JSRC2 [SRVC CF,BC=B,RMT=5]	MASTER DIVISION	MASTER DEPARTMENT	12025			
BOX	12051	JSRC2 [SRVC CF,BC=B,RMT=5]	DIVTWO [DIVISION TWO]	LAW [DIV TWO, LAW FORMAT]	12051			

Exporting Your Search Results

The screenshot displays the Iron Mountain Connect interface for Records Management. The top navigation bar includes the logo, user name 'iron1', location 'USA', and options for 'SUPPORT' and 'LOG OUT'. The main content area shows '100 Search Results' for 'Accounting' with various filters applied. An orange callout box with the number '1' points to the 'Export' button in the top right corner. The callout text explains that clicking 'Export' generates a report with filters and criteria from the search, and that the user can determine which information to export to a .csv file.

1 Click Export to generate a report containing your search results. Filters and criteria from your Advanced Search are displayed at the top of the report:

You determine which information to export to a .csv file:

- Include extra columns not currently visible in your search results.
- Include columns not currently visible in your search results EXCEPT for the Long Description field.
- Include only the columns that you selected in your search.

Item Type	Customer	SKP Barcode	From
BOX	RC2S8 [RC2S8]	456917001	201
BOX	RC2S8 [RC2S8]	456917002	201
BOX	RC2S8 [RC2S8]	456917003	201
BOX	RC2S8 [RC2S8]	456917004	201
BOX	RC2S8 [RC2S8]	456917005	201
BOX	RC2S8 [RC2S8]	456917006	201
BOX	RC2S8 [RC2S8]	456917009	201
BOX	RC2S8 [RC2S8]	456917015	2011-11-14
BOX	RC2S8 [RC2S8]	456917016	2011-11-14
BOX	RC2S8 [RC2S8]	456917018	2011-11-14

Exporting Your Search Results

IRON MOUNTAIN CONNECT Welcome iron1 USA SUPPORT LOG OUT

RECORDS MANAGEMENT

Search Accounting > Multi-Box Search

Record Type: All (selected), Boxes, Files

Customer: RC2S8 [RC2S8]

Department: DEPT A [ACCOUNTING DEPARTMENT]

Status: All

File Group: All

100 Search Results

Action: Request Unlisted Open Shelf File

Retrievals (0)

Reset View Export

Item Type	Customer	SKP Barcode	Item ID	Item Name	Status	Create Date	Action
BOX	RC2S8 [RC2S8]	456917001	2011-11-14	DEPT A [ACCOUNTING DEPARTMENT]	At Iron Mountain	2011-11-14	Add to Cart
BOX	RC2S8 [RC2S8]	456917002	2011-11-14	DEPT A [ACCOUNTING DEPARTMENT]	At Iron Mountain	2011-11-14	Add to Cart
BOX	RC2S8 [RC2S8]	456917003	2011-11-14	DEPT A [ACCOUNTING DEPARTMENT]	At Iron Mountain	2011-11-14	Add to Cart
BOX	RC2S8 [RC2S8]	456917004	2011-11-14	DEPT A [ACCOUNTING DEPARTMENT]	At Iron Mountain	2011-11-14	Add to Cart
BOX	RC2S8 [RC2S8]	456917005	2011-11-14	DEPT A [ACCOUNTING DEPARTMENT]	At Iron Mountain	2011-11-14	Add to Cart
BOX	RC2S8 [RC2S8]	456917006	2011-11-14	DEPT A [ACCOUNTING DEPARTMENT]	At Iron Mountain	2011-11-14	Add to Cart
BOX	RC2S8 [RC2S8]	456917009	2011-11-14	DEPT A [ACCOUNTING DEPARTMENT]	At Iron Mountain	2011-11-14	Add to Cart
BOX	RC2S8 [RC2S8]	456917015	2011-11-14	DEPT A [ACCOUNTING DEPARTMENT]	At Iron Mountain	2011-11-14	Add to Cart
BOX	RC2S8 [RC2S8]	456917016	2011-11-14	DEPT A [ACCOUNTING DEPARTMENT]	At Iron Mountain	2011-11-14	Add to Cart

Callout 1: Your search parameters are displayed in the report.

Callout 2: The system processes the report in the background so you are able to continue working while the report generates

Callout 3: You can open your report, save it to your computer or cancel it. The report is automatically separated into two .zip files; one for boxes, one for files.

Do you want to open or save SearchResults_AssetsReport_100820141315.zip (7.27 KB) from www2.ironmountainconnect.com?

Open Save Cancel

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