Advanced Search

IRON MOUNTAIN CONNECT™ RECORDS MANAGEMENT
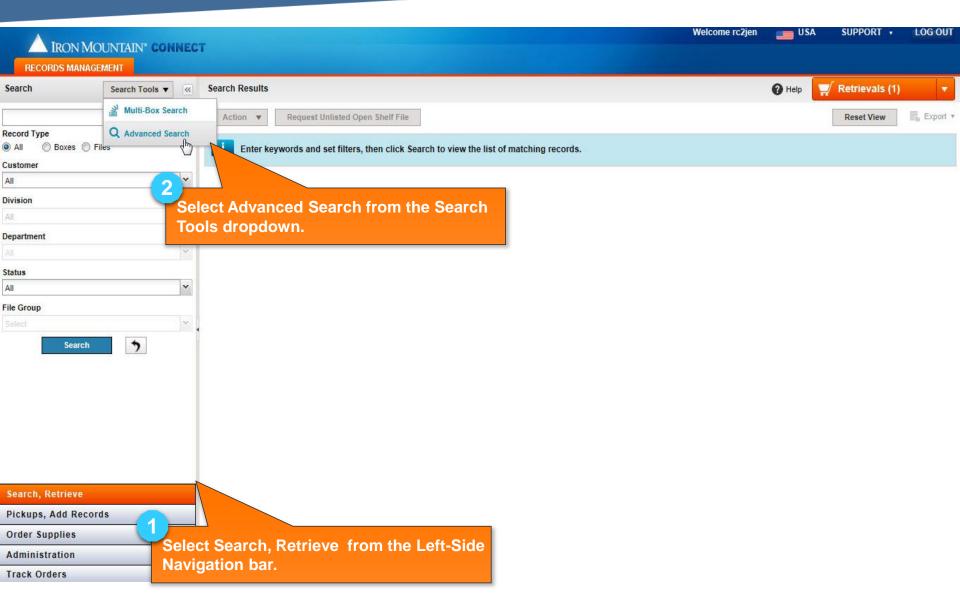
![Iron Mountain logo]

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

IRON MOUNTAIN®

Creating an Advanced Search

Welcome rc2jen — USA — SUPPORT ▾ — LOG OUT

△ IRON MOUNTAIN® CONNECT

RECORDS MANAGEMENT

| Search | Search Tools ▼ | « | Search Results | ❓ Help | 🛒 Retrievals (1) ▾ |

- 🖹 Multi-Box Search
- 🔍 Advanced Search

Action ▼   Request Unlisted Open Shelf File   Reset View   🖳 Export ▾

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

Record Type
◉ All   ○ Boxes   ○ Files

Customer
All

2 Select Advanced Search from the Search Tools dropdown.

Division
All

Department
All

Status
All

File Group
Select

Search   ↩

Search, Retrieve

Pickups, Add Records

1

Order Supplies

Administration

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

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.

Welcome rc2jen   USA   SUPPORT ▾   LOG OUT

Q Advanced Search   ❓ Close ✕

FILTERS: Select filters to find matching records based on filter settings only, or add up to five search criteria to build logic into your search. 💬

Record Type	● All ○ Boxes ○ Files	☑ Include Inactive
Customer	ABC [ABC-FOR RC CALC PROJ DO NOT CHANGE]	▾
Department	All	▾
Status	All	▾
File Group	All	▾
Record Code	EDM [EDM]	☰
Hold Code	All	☰

CRITERIA: 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. 💬

Field	Rule	Value	
Select ▾	Select ▾		⊖

➕ Add

[Search] ↩ Reset [Cancel]

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

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**

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***

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***

6 Click Search.

Viewing Results & Editing Settings

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.

i 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.

Exporting Your Search Results

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.

Exporting Your Search Results