In Content Manager, there are various available options to search for records. The information in this manual is a supplement to training and other resources already available.



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Content Manager (CM) Guide Search Manual

Basic Concept = Content vs. Metadata

Everything in Content Manager is 100% searchable. This includes both the content and metadata.

Content = Content Manager automatically indexes everything within the **content** or **body** of electronic records. Examples of records that have content indexed (searchable): email messages, Word documents, Excel spreadsheets, PDFs (only if they were created from an electronic file, such as Word, or were scanned with OCR), etc. **Metadata** = Metadata is information *about* records. All records in Content Manager have searchable metadata. Examples of metadata: the title of the document, the name of the person that filed or created the record, the date it was created, notes that were entered, document size, retention category, and many more.



Basic Concept = Parameters vs. Search Terms

Regardless of which search option you are using; it is important to remember that **all** searches in Content Manager use **Parameters** and **Search Terms**.

Parameter = the parameter is also called a "**Search Method**" in the system and is labeled "**Search By**". This is you telling the system where (i.e. which field or table) you want to search. This is the *where to look*.

Search Term = this is where you enter your specific search term (keyword, date, or other qualifier) for the specific Parameter. This is labeled "**Matching criteria**". This is the *what to look for*.

Example: To search for the word "**platypus**" in the *content* of any record, the parameter is "Document Content" and the search term is "Platypus":

| Search for | Search by | | Matching criteria | |
|-------------|------------------|-----|-------------------|--|
| necords 🗸 🗸 | Document Content | ~ 🔍 | platypus | |



Before Beginning a Search

1. Before beginning your search, determine what you know about what you are looking for.

In addition to basic search terms or keywords, ask yourself specific questions – were these records filed/created in a certain date range? Were they filed by a particular person? Were they in a particular category? Many details can help to narrow down what you are looking for.

You can use a table like this to help guide your search:

| Question? (What do you know about the records you're looking for?) | Enter your information | Parameters to try |
|--|------------------------|------------------------------------|
| | | Kauna and Casanah |
| Keywords | | Keyword Search |
| Who filed it? | | Checked in By |
| When was it filed? | | Date Filed |
| What category was it filed in? | | Category |
| What format was it in? | | Record Type (ERecord, Digital |
| | | Folder, Box, etc.) |
| | | Extension (.PDF, .XLS, .MSG, etc.) |

2. **Consider which agency owns the records**. Remember that you're not just searching through your own records, but also all records filed by anyone in your agency. (Default is that you have access to all records within your *section* in the county organizational structure, but the setup varies by department).

Also, if you are a user in more than one Agency/Owner in Content Manager, you might need to add an Owner parameter to narrow down your search.

3. **Start broad and narrow down as needed**. Even if you have identified a lot of helpful information (step 1, above), best practice is to start your search as broad as possible. Maybe try a search with one or two parameters selected, and then use the "Refine Search" tool to refine as needed.





Search Options

There are **four** search options, all available on the **Search tab**:

| 1. Search | by one parameter | 2. Sear | ch by multiple paramet | 3. Sers | Use a p so o so | re-built 4. earch form r saved earch | Brows | e throu records catego | ցի by ry |
|----------------------|------------------------|----------------------|--------------------------------|----------------------|--------------------------|---|---------------------|------------------------------|----------------|
| 🔁 ╤ Conter | nt Manager OME SE | ARCH | VIEW I | MANAGE | ADMI | NISTRATION | | | |
| Mu 2 eld E Search | Record Folde | a 3 Jox th Search | Saved Searches • | Bro 4 by Category | Search History | Location Search + | 123 Count | Refine Search | Save Search |
| Chardenda | Second for | Search Rec | ords | Court hu | | Search Locations | tabie e arit | To | ols |
| Recent | E Reco | rds | ~ | Keywor | d Search | ~ <mark>1</mark> " | retlands | eria | |

Reminder! When using the one parameter option, do NOT change the "Search for" section, and leave it with "Records.







Search Tools

These are very useful tools in Content Manager that will come in handy when doing searches.

Refine Search button (or F7) – use this button after searching to change or narrow down a search.



Count button (or **F6**) – use after performing a search to see how many records were located from your search.

| 👌 🔻 Coi | ntent Mana | iger | | | | | | | | | |
|----------------------|---------------------|------------------|---------------|--------------------------------|-----------------------|-------------------|----------------------|-------|------------------|-------------------|-------------------|
| - 🔁 👻 | HOME | SEAR | сн | VIEW | MANAGE | ADMI | NISTRATION | | | | |
| Q | R | 5 | a | Q | | B | <u>A</u> | 123 | R | R | 0 |
| Multi-Fiel Search | d ERecord Search | Folder Search | Box Search | Saved Searches • | Browse by Category | Search History | Location Search • | Count | Refine Search | Save Search As | Refresh Search |
| | | Sea | arch Rec | ords | | | Search Locations | | Т | ools | |

Search History - Review and re-run all your past searches. Note that Search History is not available until after you have

run a search.



Save Search As – if you want to save a search for future reference, click the Save Search As button. (If you want this search to be available to others in your group, contact Records Management and we can make it available to everyone







Search Forms

Search forms are a new feature that are available in the October 2021 upgrade to Content Manager. Search forms are a great place to start when searching in Content Manager, especially for new or novice users.

There are three search forms available, one for each format of record: ERecord, Folder and Box



ERecord Search = searches all Electronic Records (emails, Word documents, Excel spreadsheets, PDFs, image files, video files, and many more)

Folder Search = searches all folder record types, Digital Folder, Digital Subfolder, Physical Folder, and agency-specific folders

Box Search = searches all boxes

To use a search form:

- 1. Click the search form option on the Search tab
- 2. Enter your search term(s) in the appropriate field(s)
- 3. Click OK
- 4. Results will be displayed.

Enter information in fields the same way as you would any other search option, **refer to pages 12-14 for specific guidance on using different fields**.

Note – if you use a search form and then click F7 or Refine Search, you will not see a parameter limiting by record type (e.g. Box vs. Folder vs. ERecord); instead that is built into the search form.



Content Manager (CM) Guide Search Manual

| Q ERecord Search - C X | ERecord Search Form |
|---|---|
| Record Text Keyword Search | Keyword Search = any word from the content, title or other metadata |
| Title Word | Title Word = any word from the title of the record |
| People Author | Notes Word = any word from the notes of the record |
| Checked in By | Author = name of the person that created the record or sent the email |
| Dates Date Created mm/dd/yyyy 1 to mm/dd/yyyy 1 | Checked in By = name of the person that filed the record |
| Date Filed mm/dd/yyyy v 1 to mm/dd/yyyy v 1 Other Metadata | Date Created = date the original record was created |
| Extension File Plan Details | Date Filed - date the record was filed |
| Container Q Category VQ | Extension - denotes type/format/e.g. msg. ndf. desv) |
| Owner Q | Container - name of the folder where the record is located |
| | Container – name of the retention enteren entered to the record |
| OK Cancel Help | Category = title of the retention category assigned to the record |
| | Owner = name of the agency that owns the record |
| Q Folder Search - X | Folder Search Form |
| Text Keyword Search | Keyword Search = any word from the title, notes or other metadata |
| Title Word | Title Word = any word from the title of the folder |
| People Creator | Notes Word = any word from the notes of the folder |
| Dates Date Created mm/dd/www iii to mm/dd/www iiii | Creator = name of the person that created the folder |
| CutoffDate mm/dd/yyyy vî to mm/dd/yyyy vî | Date Created = date the folder was created in the system |
| Other Metadata Record Number | CutoffDate = date the records become inactive |
| Container | Record Number = number auto-generated by Content Manager |
| Owner Q | Container = name of the parent folder or box |
| | Category = title of the retention category assigned to the records |
| OK Cancel Halo | Owner = name of the agency that owns the records in the folder |
| | |
| Q Box Search - X | Box Search Form |
| Text Keyword Search | Keyword Search = any word from the title, notes or other metadata |
| Title Word 🗸 | Title Word = any word from the title of the folder |
| People Creator | Notes Word = any word from the notes of the folder (optional field) |
| Dates Date Created mm/dd/yyyy v 1 to mm/dd/yyyy v 1 | Creator = name of the person that entered/created the box |
| CutoffDate mm/dd/yyyy v 1 to mm/dd/yyyy v 1 | Date Created = date the box was entered/created in the system |
| Record Number | CutoffDate = date the records become inactive |
| File Plan Details | Record Number = number auto-generated by Content Manager |
| Owner VQ | Agency Number = optional number entered by user |
| RCAccessionNumber RCLegacyLocationNumber | Category = title of the retention category assigned to the records |
| OK Cancel Help | Owner = name of the agency that owns the records in the folder |
| | RCAccessionNumber = number assigned when added to Records Center |
| | RCLegacyLocationNumber = number from old box transmittal forms |
| | |





Saved Searches

Saved Searches are pre-built searches using common search parameters; they are a great resource for new users.



All available saved searches will be displayed. Note that each user will see a different list of saved searches. Choose the desired search and **double click** to run it.



Certain searches will provide unique instructions which will be listed at the top of the window.





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12/2022



Multi-Field Search

Access the Multi-Field Search by clicking the Search tab and the Multi-Field Search button.

| 🧕 🔻 Cont | tent Mana | iger | | | | |
|-----------------------|-------------------|------------------|---------------|--------------------------------|-----------------------|-------------------|
| - 🔁 🕶 | номе | SEAR | сн | VIEW | MANAGE | ADMI |
| Q | R | - | a | Q | | B |
| Multi-Field Search | ERecord Search | Folder Search | Box Search | Saved Searches • | Browse by Category | Search History |
| Search Records | | | | | | |

The Search for Records screen will open. This window gives you the power to build a custom search to find **anything** in the system.

| Search for Records | – 🗆 X | | | | | |
|---|------------|--|--|--|--|--|
| Search Filter Record Types Sort Results Options | | | | | | |
| Search By Parameter | ~ Q | | | | | |
| Enter the search criteria for a content search | | | | | | |
| "2019 financial report" Search Term | ~ Q | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| AND O OR New Insert Delete () NO | T Reset | | | | | |
| and content: Combine Multiple | | | | | | |
| Parameters | | | | | | |
| OK Cancel Open Edit | or 🔻 Help | | | | | |



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Choosing a Search Parameter

When doing either a Basic Search (one parameter) or an Multi-Field Search, you **must** start by selecting a search parameter ("Search By"). This means is that you are telling the system *where to look* to perform the search (i.e. which field or table you want to search in). The search parameter is selected under **"Search By"**. Examples of search parameters are "Record Number", "Title Word" and "Date Filed".

To choose a search parameter, there are **three** options:

| Search Filter Record Types Sort Results Options | 3 |
|---|---|
| Search By | |
| | |
| | |
| 2 | |

1. manually type (or copy and paste) it in the field below Search By (if something is already there, erase it)

2. click the down arrow to choose from previously used parameters

3. click the **magnifying glass lookup button** to choose from **all available** parameters in a Search Methods window

(hint: click **Alphabetical** for available options displayed in the most accessible way – most are not used – the "Caption" column is the most familiar name to review)

| Search Methods | | _ | × |
|--------------------------|-----------------------|--------------|---|
| O By Category | ⊖ By Format | Alphabetical | |
| Method Name | Caption 🔨 | | ^ |
| 🙆 acl | Access Control | | |
| accession | Accession Number | | |
| ab AcquisitionCost | Acquisition Cost | | |
| 🔕 audit | Active Audit Event | | |
| activity | Activity | | |
| ab AdditionalDocumentNot | es Additional Documen | t Notes | |

Tip! When choosing a search parameter, you must wait for it to go **bold**. If it doesn't then you have not selected a valid search parameter.

Tip! Certain search parameters will have different options that you can use to help refine your searches. "Select search style" will appear below if available. The options will depend on the parameter you have selected. They are described in more detail below.



Most common search parameters:

- 1. Keyword Search any word from the content and more than 10 different metadata fields (see page 14 for a complete list)
- 2. Title Word any word from the title
- 3. Document Content any word from the content/body of the record
- 4. Record Number the unique (system generated) number of the record
- 5. Record Type narrow down to a specific format (Box, Folder, ERecord)
- 6. Date Filed date the record was filed to the system (Erecords only)
- 7. **Date Created** date the record was created, sent, or received (Erecords only) or the date the box or folder was entered into the system (Box or Folder only)
- 8. In space whether the Box is in the Records Center or not (Boxes only)
- 9. Checked in by name of the person that filed the record (ERecord only)
- 10. Creator name of the person that created the record (Box and Folder only)

For a more complete list of other search parameters not included above, refer to the Search Fields job aids.

Entering Search Parameters

After you have chosen a parameter, enter search term(s) below it. Note that certain search parameters must be used differently, there are 3 types of parameters:

- 1. Text and Numbers page 12
- 2. Dates page 13
- 3. "Controlled" Parameters pages 14 -17





Text and Number Searching (Keyword Search, Any Word, Title Word, Notes Word)

One word? If you are certain about one exact term that you need to search for, simply type it in.

| Search By |
|--|
| Any Word |
| Enter the words to use for this search |
| skykomish |

Above search will find all records with the word Skykomish in the title or notes.

Note! If your term contains any **punctuation** (example: 2015-005 or Budget_Report) the system considers them *phrases* (see below) and you should enter them in quotation marks, for example 2015-005 should be entered as "2015-005". Using quotation marks will find all instances of those words in that order, but not necessarily in that same syntax (for example, your results might retrieve "2015, 005", 2015.005", "2015 / 005". To ensure the same syntax, use asterisks before and after, *2015-005*.

If instead the record you are searching uses **"CamelCase"** between multiple words (for example: AdoptionApplicationFee) then the system considers those to be a single word and you should use asterisks around the portion that you want to search (in that example enter: *adoption*).

Partial words? Use wildcards * or ?

* for any number of characters

| Search By | |
|-----------------------------|---------------------------|
| Record Number | |
| Choose operator and enter s | tring value to search for |
| Matching \vee | B432* |

Above search will find all records with numbers *starting with* B432, including B4323 and B432848.

| or use ? for just one ch | aracter |
|--|---------|
| Search By | |
| Title Word | |
| Enter the words to use for this search | |
| Lars?n | |
| | |

Above search will find all titles that include either Larson or Larsen.

Phrases? Use quotation marks before and after the phrase

| Search By |
|--|
| Notes Word |
| Enter the words to use for this search |
| "budget report" |
| |

Above search will find all records with the specific phrase "budget report" in the notes. **Note**! If you enter multiple words but do not use quotation marks, the system by default treats it as an OR search (i.e. it searches for **either** of the terms, but not both of them).





Multiple terms? Use BOOLEAN operators (AND, OR, NOT)

| Search By | |
|-----------------------|---------------------------|
| Keyword Search | |
| Enter the search crit | eria for a content search |
| receipt AND unapp | proved |

Above will find all records with both "receipt" and "unapproved" in either the title, notes or content.

Note! If you are searching for a word or phrase with an **ampersand (&)** as part of it (i.e. "A&E Contract") you should remove the ampersand from the search (i.e. "A E Contract") to retrieve the most accurate results. This is because the system treats the (&) as a Boolean operator (AND).

Date Searching (All date fields)

Specific date – enter the date in the first field after Matching

| Search By | |
|---------------------------------|---------------------------|
| Date Filed | |
| Enter a date and optionally a t | o date for a range search |
| Matching \checkmark | 4/6/2021 |
| [And Up Until] | mm/dd/yyyy ł |

Date range – enter the date range in the two fields

| Search By | |
|---------------------------------|---------------------------|
| Date Filed | |
| Enter a date and optionally a t | o date for a range search |
| Matching \vee | 2/1/2021 h |
| [And Up Until] | 2/28/2021 h |

Blank date – erase all dates and search

| Search By | | | |
|--------------|--------------------|---------------------------|---|
| Date Filed | | | |
| Enter a date | and optionally a t | o date for a range search | |
| Matching | ~ | mm/dd/yyyy | ł |
| | [And Up Until] | mm/dd/yyyy | ł |





Note: Ignore the right-side of the date field (that area is for a time stamp, which is not used).

| Search By | | | | |
|----------------|--------------------|------------------------|----------|------------|
| Date Filed | | | | ~ Q |
| Enter a date a | ind optionally a t | o date for a range sea | arch | |
| Matching | ~ | mm/dd/yyyy | hh:mass | - 1 |
| | [And Up Until] | mm/dd/yyyy | hhimmiss | |

"Controlled" Search Parameters (Categories, Owners, all names, etc.)

Certain parameters in Content Manager are "controlled", which means that the system requires a user to **choose** from a list (by clicking the magnifying glass icon) rather than perform a traditional search.

| ; | Search fo | r Records | ; | | | | — | | × |
|---|-----------|------------|-----------------|------|---------|---------|---|--------|---|
| | Search | Filter | Record Types | Sort | Results | Options | | | |
| | Search | Бу | | | | | | | |
| | Check | ed In By | | | | | | \sim | ٩ |
| | Enter t | he Locatio | on to search by | | | | | | |
| | | | | | | | | ~ | q |
| | Rec | ursive | | | | | | _ | |

Each "controlled" parameter though has more options under the "Select search style..." section, which can be accessed with the down arrow.

| Search By | |
|--|------------|
| Owner | ~ Q |
| Enter the Location to search by | |
| | ~ Q |
| Recursive | |
| | |
| | |
| | |
| | |
| | |
| Select search style for Location | |
| An individual Location | \sim |
| Please type or use KwikSelect button to enter a Location | |

Detailed guidance on how to use these options for specific parameters is listed on the following pages.

All Name Fields, Owner

Category, Container

Retention schedule, In space



All Name fields (Checked In By, Creator, Author, etc.)

An individual location - default option, requires you to select a single person

A list of locations – allows you to select multiple people (each must be separately searched for and selected) A selection of locations – allows you to search for other criteria besides name, for example, all people that are members of a particular organization (Members of = Owner name) or to search by their network login instead of their name (Network Login = [login/alias]) – hint: click the magnifying glass icon to pull up the search window locations with matching text values for Name - allows partial name searches, for example, enter *gail* to retrieve anybody with the name Gail

Where [parameter] is not specified - not applicable

Owner (organization/agency that owns the records, formerly DDS)

An individual location - default option, forces you to select a single Owner

A list of locations - allows you to select multiple owners (each needs to be separately searched and selected) A selection of locations - allows you to do a "search within a search" for other criteria (besides name/title), for example, search for all organizations that a particular person is a member of (e.g. Has Member = [name]) Locations with matching text values for Name - allows partial name searches, for example *HR* to find all organizations with HR in their title. This is also how you'd search across an entire department or division, for example enter DES-FBOD* to search across DES-FBOD. Below example is how to search for all records owned by any agency within DCHS.

| Search By | |
|--|---|
| Owner V Q | |
| Enter the Name of the Location you wish to search by | |
| DCHS* | • |
| Recursive | |
| | |
| | |
| | |
| | |
| | |
| Select search style for Location | |
| Locations with matching text values for Name | • |

Where owner is not specified - not applicable (all records must have owners)



Category

An individual category – default option, requires you to select a single category

A list of categories – allows you to select multiple categories (each must be separately searched and selected) A selection of categories – allows a "search within a search" for other criteria specific to categories, for example, you could use this to search for all non-archival categories.

Categories with matching text values for category title – allows **partial category title searches**, for example *supervisor* would search in all categories with the word supervisor in the category name



Where category is not specified - not applicable (all records must have categories)

Container (the folder or box where the record is stored in Content Manager)

An individual record – default, forces you to select a single container

A list of records – allows you to select multiple containers (each needs to be separately searched and added) A selection of Records – allows you to search for containers using any criteria besides record number (for example use this to search for a word from the folder's title). The example below shows how to search for a record with the word "whalen" in the title of the box or folder it's stored in. Note that you can then click the "Add Tag Filter" button to tag or untag which of the responsive containers you want to search in.

| Search By | |
|--|------------------|
| Container | ~ Q |
| Enter a valid search string for selecting Records | |
| whalen | |
| | ~ <mark>Q</mark> |
| | |
| Recursive | |
| Press 'Add Tag Filter' to refine your search using Tag/Untag | Add Tag Filter |
| | Clear Tag Filter |
| Select search style for Record | |
| A selection of Records | ~ |
| | |



Records with matching text values for Record Number – search for a container based on its record number Where container is not specified – to specify when a record does not have a parent container

Retention schedule (DAN/series assigned to the category and records)

An individual schedule – default option, forces you to select a single schedule based on the DAN A list of schedules – allows you to select multiple schedules based on the DAN A selection of schedules – use this for a search within a search to search by criteria besides DAN, for example Schedule Word = employee to locate all schedules with the word "employee" in the title or description.

Schedules with matching text values for Schedule Number – not applicable Where retention schedule is not specified – not applicable

In space (location of physical records)

An individual space – default option, forces you to select a specific Records Center location number (16-digit)

A list of spaces – allows you to select multiple Records Center locations

A selection of spaces – not applicable

Spaces with matching text values for Space Number – not applicable

Where home space is not specified – choose this to locate boxes that are anywhere besides the Records Center (click the NOT button to search for the opposite, all boxes that are anywhere in the Records Center)





Combine Multiple Parameters

The row of buttons in the middle of the Advanced Search window are used to build a search with multiple parameters.

When you want to search for **both** parameters:

| AND OR | New | Insert | Delete | () | NOT | Reset |
|--------|-----|--------|--------|----|-----|-------|
|--------|-----|--------|--------|----|-----|-------|

Select **AND** then click **New.** This creates a duplicate of the search parameter you've selected. Now, go back up to the top to select the new Parameter and Search Term for what you just added, erasing the duplicate text listed. *Note that AND is the default option and you do not need to select it unless you've previously used OR.*

When you want to search for either of the parameters:



Select **OR** and then click **New**. Then go back up to the top to select the Parameter and Search Term for what you just added. If your "OR" search includes three or more total parameters, you also need **tag each of the "OR" parameters** (by clicking to the left of it) and click the **(...)** button to add parentheses around those items.

| | Insert | Delete | () | NOT | Reset |
|---|-------------------------------------|--------|----|-----|-------|
| title:report | | | | | |
| ✓ and (content: "2018 financial report" | | | | | |
| or content:"2019 fir | or content:"2019 financial report") | | | | |

When you want to search for a **negative** (i.e. to search for something that does NOT include your parameter):



Select NOT. Then go back up to the top to select the Parameter and Search Term that you just added, then your results will include the opposite. For example, if you use the Parameter "Title Word" and enter the search term "miscellaneous", it will return all records that do not have the word miscellaneous in the title.

Insert – this does the same thing as "New", but adds the parameter above your current select, rather than below it. **Delete** – this deletes your selected parameter, which can be useful if you don't want to delete the entire search. **Reset** – this deletes everything in your search and starts with a fresh search screen.

Extra Advanced Searching! If you're an advanced searcher, you can write your searches out using BOOLEAN search terminology and Content Manager syntax with the String Editor. Click the **Editor button** at the bottom and select **String** to access the Search String editor.





Content Manager (CM) Guide Search Manual

Detailed Guidance – Keyword Search Parameter

The Keyword Search field is the most comprehensive search parameter in the system, the **closest thing to a Google-like search**! By default, Keyword Search searches across the content AND at least 10 different metadata fields (which is pretty much what Google does, by the way). Note that this also includes the dates and all contact names (to, from, cc) for email messages.

To do a search across the content and various metadata fields; simply enter the term(s).

If you want to find anything with the word Budget, enter:

Budget

If you want to search for records that contain the terms "Budget" and "Status Report", enter: **Budget AND "Status Report"**

If you wanted to search for the term "Budget" and either "Status Report" or "Quarterly Report", enter: Budget AND ("Status Report" OR "Quarterly Report")

Fields/Data Searchable with "Keyword Search":

- Title
- Notes
- Record Number
- Owner (i.e. agency/office name)
- Category
- Content (ERecords only)
- To/From/CC and dates (Email only)
- Matter Title/Description (Pre-2019 Boxes and Folders only)
- Agency Number (Boxes and Physical Folders only)
- Source Path (Pre-2019 Erecords only only)
- Container (ERecords, Physical Folders and Digital Subfolders only)
- Box Description (Pre-2019 Boxes only)
- RC Accession Number (Boxes only)
- RC Legacy Disposition Number (Pre-2010 Boxes only)

The "Keyword Search" parameter does **not** search any other data fields, including most date fields. You still must use different search parameters to narrow by those additional fields.





Advanced "Keyword Search" Features:

To search for something that you're not sure of the spelling, use DREFUZZY DREFUZZY(search term) *example: DREFUZZY(resuscitate)*

To search for something in the same paragraph as something else, use // (search term1) // (search term2) *example: kittens // adopters*

To search for all *tenses* of a word, use ~ search term~ *example: vaccinate*~

What if you want to direct the search to a specific field, rather than leaving it open-ended?

<u>Use the below formulas:</u> Record Number = (search term):TS_NUMBER Title = (search term):TS_TITLE Notes = (search term):TS_NOTES Content = (search term):DRECONTENT Extension = (search term):TS_EXTENSION Date Created = (date term):TD_DATECREATED Date Filed = (date term):TD_DATEREGISTERED

Example: to search for all Word documents (DOC or DOCX extension) with the word "version" in the title and the phrase "maintenance crew" in the body/content, you could enter this Keyword Search:

| Search By | | |
|---|--------|---|
| Keyword Search | \sim | ٩ |
| Enter the search criteria for a content search | | |
| (doc*):TS_EXTENSION AND (version):TS_TITLE AND (*maintenance crew*):DRECONTENT | ~ | م |





Search Troubleshooting

Waiting for response from server... – If your search results in the below "Please Wait" window, it just means a search is in process. Certain searches, especially complicated searches with many parameters, can take a while to process but they should generally complete within a few minutes. It can also mean that the search was improperly constructed, or that there are network connectivity issues. You can either wait for the search to complete or click the **Cancel** button to cancel the search and try again with different parameters.



Message about "hits" limit – Certain searches will prompt a message "The document content component of your search returned 1000000 possible matches, however there is a configured limit of 1000000 on the number of results that can be retrieved. This may affect the accuracy of your search. Consider using more specific search criteria and re-running the search." If you get this message, just click **OK** to proceed to the search results. This does **not** mean that there is anything inaccurate about your search results, it only means that a *portion* of your search has over 1 million hits across the entire Content Manager system (even all users only have access to smaller subsets of records). If you need to perform a search with over 1 million hits, contact Records Management for assistance.





King County Records Management Program 206-477-6889 – <u>records.management@kingcounty.gov</u> www.kingcounty.gov/recordsmanagement

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Something turns red - If you enter certain search terms and the text turns red, it means that you are searching across a controlled list (like staff names or owner/agency names) and the option you've entered is invalid. Click the blue folder button to select the correct one.

| Search By | |
|---------------------------------|------------|
| Checked In By | ~ Q |
| Enter the Location to search by | |
| doe, john | ~ Q |
| Recursive | |

Error message (Please type or use KwikSelect button to enter a location/record). – Just like above, this just means you are using a parameter that searches across a controlled list. In this situation, click OK and then make changes – either erase and type the correct information (it must match how it's listed in Content Manager) or click the blue folder lookup button (KwikSelect) and select your desired option.

| Content I | Manager | \times |
|-----------|---|----------|
| è | Please type or use KwikSelect button to enter a Location. | |
| | ОК | |

Error message (records that are prevented from being displayed...) – If you enter a search and get an error message about records being prevented from being displayed because of filtering or security concerns, this does not mean the search did not work. This is the standard message when performing any search that retrieves zero results. Are you certain that the search you constructed was correct? Do you **know** that what you are looking for is even in Content Manager? If so, click F7 (or Refine Search) to change your search.

| Search Se | arch Search Search Search | hes - Category History | Search + | Search Search As Search | All A |
|---|---------------------------|------------------------|--------------|-------------------------|-------|
| Shortcuts | Search for | Search by | Ma | tching criteria | |
| Recent | Records | ✓ Title Word | ~ Q p | o6949x | |
| | 🗸 📹 Record Number | Title (Free Text Part) | | Date Created | r |
| Records - title:po6949x - Filtered - No Records found. There may be matching Records that are prevented from being displayed because of filtering or for security reasons. Press F7 to refine your search criteria. | | | | | |





Troubleshooting Advice - If you continue to have trouble with slow searches, try these tips:

If you are using the **Keyword Search** parameter and have **multiple terms** (or any words with dashes between them (i.e. "Kohl-Welles") ...

1. Use quotation marks, or





2. But do not using wildcards (asterisks * or question marks ?), or



Enter the words without any punctuation or Boolean operator



New Records not coming up in searches yet – If you recently created or filed records, you might not be able to immediately locate them in searches. **This is because data in Content Manager is indexed at different times.**

Keyword Search = because this specific parameter includes content for electronic records, it takes longer to index new records. Newly created or filed records can be located with Keyword Search within one business day.

All other parameters* and are indexed <u>immediately</u> after the record is created or filed. If you are trying to locate a record that was created or filed within the same day, use any parameter *besides* Keyword Search. * This includes all metadata fields, examples: Title Word, Date Filed, Creator, etc.

