

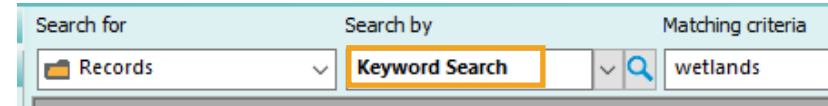


This document identifies search parameters for **Electronic Records** in Content Manager (CM). Review the [“Search Manual”](#) and other [job aids](#) for detailed guidance on how to perform searches using the below search parameters.

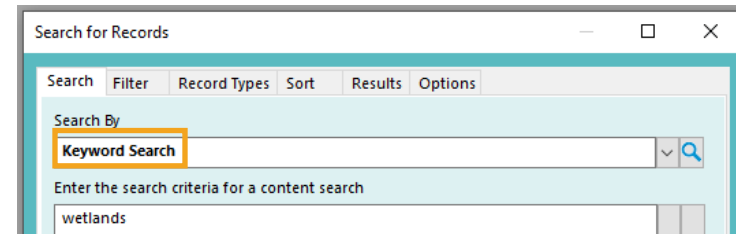
How to search for Electronic Records:

In the “Search by” field enter any of the parameters from the green column below. (You can also enter the search parameter **Record Type = ERecord** to ensure that you are not searching for other record types.)

Basic Search (single parameter):



Advanced Search (multiple parameters):



To Search Across Multiple Fields:

“Search By” Parameter in Content Manager	Which fields does it search?	Instructions
Keyword Search	<ul style="list-style-type: none"> - Content - Title - To/From/CC/BCC and dates (Email only) - Notes - Record Number - Owner (i.e. agency/office name) - Category - Container (folder name/number) - Source Path (pre-2019 KC ERMS records only) 	<p>Enter your search term.</p> <p>Use quotes for phrases (e.g. “project report” or “95-976”) and use asterisks/wildcards for partial words (e.g. duwam*).</p> <p>For multiple keywords, use BOOLEAN operators (i.e. Duwamish AND 978578).</p>
Any Word	<ul style="list-style-type: none"> - Content - Title - Notes 	Same as above.





To Search in Specific Fields:

"Search By" Parameter in Content Manager	What does this search?	KC ERMS Field Name (legacy system)	Content Manager Field Name (current data)	Notes/Instructions when using this parameter
Keywords from the Content or Title of the record				
Document Content	Anything from the content/body of the record. Including the author (From), addressee (TO), CC and BCC lines of emails.	n/a	n/a	Enter your search term. Use quotes for phrases (e.g. "project report" or "95-976") and use asterisks/wildcards for partial words (e.g. duwam*).
Title Word	The title or subject line of the record automatically captured by the system. It is not entered or changed by the user.	Subject/Title	ERecord Title	Enter a word. For phrases use quotation marks (i.e. "project files").
Names of People associated with the record				
Checked in By	Name of the person that filed the record.	Document Filed By	Checked In By	Enter a name (or partial name) in the field and then click the blue folder button. Must enter last name first.





Content Manager Guidance

Electronic Records – Search Parameters and Field Crosswalk

"Search By" Parameter in Content Manager	What does this search?	KC ERMS Field Name (legacy system)	Content Manager Field Name (current data)	Notes/Instructions when using this parameter
Author	Name of the person that sent the email or authored/created the electronic record.	From	Author	Enter a name (or partial name) in the field and then click the blue folder button. Must enter last name first. Note: this only works for internal names with King County addresses. For external names, use Keyword Search.
Addressee [Emails only, filed <u>before</u> 10/2019 or <u>after</u> 8/2021 only]	Name of the person that received the email in the " To " line.	To	Addressee	Enter a name (or partial name) in the field and then click the blue folder button. Must enter last name first. Note: this only works for internal names with King County addresses. For external names, use Keyword Search.
Copied [Emails only, filed <u>before</u> 10/2019 or <u>after</u> 8/2021 only]	Name of the person that received the email in the " CC " line.	CC	Copied	Enter a name (or partial name) in the field and then click the blue folder button. Must enter last name first. Note: this only works for internal names with King County addresses. For external names, use Keyword Search.





“Search By” Parameter in Content Manager	What does this search?	KC ERMS Field Name (legacy system)	Content Manager Field Name (current data)	Notes/Instructions when using this parameter
Blind Copied [Emails only, filed <u>before</u> 10/2019 or <u>after</u> 8/2021 only]	Name of the person that received the email in the “ BCC ” line.	BCC	Blind Copied	Enter a name (or partial name) in the field and then click the blue folder button. Must enter last name first. Note: this only works for internal names with King County addresses. For external names, use Keyword Search.
Dates associated with the record				
Date Created	The date the record was created or sent/received .	Date Created/Sent	Date Created	Enter a date or a date range, or choose other date options
Date Filed	The date the record was filed/checked-in to the system.	Date Document Filed	Date Filed	Enter a date or a date range, or choose other date options.
Other Metadata (Information/Details) associated with the record				
Record Number	Content Manager’s unique auto-generated number .	Document ID Number	Record Number	Enter a number. Use asterisks for partial numbers.





Content Manager Guidance

Electronic Records – Search Parameters and Field Crosswalk

"Search By" Parameter in Content Manager	What does this search?	KC ERMS Field Name (legacy system)	Content Manager Field Name (current data)	Notes/Instructions when using this parameter
Extension	The format of the record (i.e. Word document, PDF, email message, etc.)	Format/Application	Extension	Enter the exact file extension (i.e. PDF).
Notes Word	Notes manually entered by the person who filed the record (optional field). Also searches the Comments metadata fields in source files.	Document Notes	ERecord Notes	Enter a word. For phrases use quotation marks (i.e. "project files").
Tags	Information entered in the Tags field imported as part of the record's metadata (Details/Properties)	N/A	Tags	Enter a word. For phrases use quotation marks (i.e. "project files").
GPS Location	GPS [latitude/longitude] coordinates imported as part of the file's metadata	N/A	GPS Location	Use the tool to select a location on a map and/or paste in specific coordinates, (e.g. POINT(149.09936108 - 35.318788703))
Size	The size (in Bytes) of the record.	n/a	Size	Enter a number (in bytes).





Content Manager Guidance

Electronic Records – Search Parameters and Field Crosswalk

“Search By” Parameter in Content Manager	What does this search?	KC ERMS Field Name (legacy system)	Content Manager Field Name (current data)	Notes/Instructions when using this parameter
Has Email Attachments [Emails only]	Whether an email record had any attachments (yes or no field).	Attachment Count	Has Email Attachments	Either click OK to find records with email attachments, or select NOT to find records without email attachments. It is not possible to search for the number of email attachments.
Source Path [LEGACY FIELD, before 5/2019 only]	The location the record was filed from (either a folder on a drive or an Outlook account/folder).	Source Patch	Source Path	Enter a single search term. Use quotes for phrases (i.e. “search term”). [only records filed before 5/11/2019]
File Plan Details (Content Manager storage information)				
Container	The number and title of the folder where the record is stored within Content Manager.	Folder	Folder	Click the blue folder button. Then click the "Containers" button to choose from Recent Containers, or click the "Refine Search" button to locate any container.
Category	The name/title of the retention category associated with the record.	Category Name	Category	Instead of searching, you will probably click the lookup button and scroll through available categories, which are in alphabetical order.





"Search By" Parameter in Content Manager	What does this search?	KC ERMS Field Name (legacy system)	Content Manager Field Name (current data)	Notes/Instructions when using this parameter
Owner	The organization/agency that owns the record.	Department, Division, Section/ID	Owner	Instead of searching, you will probably click the lookup button and scroll through available owners, which are in alphabetical order.

What about information about **Matter**, **Disposition eligibility dates**, **Consignment number**, and **Legal Holds**? That information is only applied at the container (Digital Folder) level. Refer to the Digital Folders – Search Parameters and Field Crosswalk for instructions on folder searches.

