Content Manager (CM) Guide

Electronic Records – Search Parameters and Field Crosswalk

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:
Use the **ERecord Search** form on the **Search tab**. For search parameters not listed on that form, use the Multi-Field search.

To Search Across Multiple Fields:

"Search By" Parameter	Which fields does it search?	Instructions
Keyword Search	- Content (including content of email attachments) - 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)	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*). For multiple keywords, use BOOLEAN operators (i.e. Duwamish AND 978578).
Any Word	- Content - Title - Notes	Same as above.

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To Search in <u>Specific</u> Fields:

"Search By" Parameter	What does this search?	Instructions
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.	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.	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.	Enter a name (or partial name) in the field and then click the blue folder button. Must enter last name first.
Author	Name of the person that **sent** the email (in the "From" line) or **authored/created** the electronic record.	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.
To [Email only]	Name of the person that **received** the email in the **"To"** line.	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.

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"Search By" Parameter	What does this search?	Instructions
CC [Email only]	Name of the person that **received** the email in the **"CC"** line.	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.
BCC [Email only]	Name of the person that **received** the email in the **"BCC"** line.	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.
Email Name [Email name]	**Any sender or recipient of an email**; searches "From", "To", "CC" <u>and</u> "BCC".	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**.	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.	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**.	Enter a number. Use asterisks for partial numbers.
Extension	The **format** of the record (i.e. Word document, PDF, email message, etc.)	Enter the exact file extension (i.e. PDF).

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"Search By" Parameter	What does this search?	Instructions
Notes Word	**Notes** manually entered by the person who filed the record (optional field). Also searches the **Comments** metadata fields in source files.	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)	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	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.	Enter a number (in bytes).
Has Email Attachments [Email only]	Whether an email record **had any attachments** (yes or no field).	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).	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.	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.	Instead of searching, you will probably click the lookup button and scroll through available categories, which are in alphabetical order.

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"Search By" Parameter	What does this search?	Instructions
Owner	The **organization/agency** that owns the record.	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.

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