



Content Manager Guidance

Search Manual

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 on the Records Management website.



SECTIONS OF THIS MANUAL:

Basic Concepts (metadata, content, parameter, search term)	Page 2
Before Beginning a Search	Page 3
Search Options (Basic, Advanced, Saved Searches, Search Forms, Browsing)	Page 4
Search Tools (Refine, Count, History, Save)	Page 5
Search Forms (ERecord, Folder and Box)	Page 6
Saved Searches	Page 8
Advanced Searches	Page 9
Choosing a Parameter	Page 10
Most Common Parameters	Page 11
Entering Search Terms	Page 12
Combining Parameters	Page 18
Detailed Guidance – “Keyword Search”	Page 19
Search Troubleshooting (common issues)	Page 21





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.

The screenshot shows a file explorer interface with a list of records on the left and a summary card on the right. The list has columns for Name, Date modified, Type, and Size. A box labeled 'METADATA' highlights the first few rows. The summary card is titled 'King County (all departments and agencies)' and shows 'Period: 2020 (1/1/2020 – 12/31/2020)'. It includes a note about percentages and a pie chart showing '15%' for 'Records Management Fundamentals training'. A box labeled 'CONTENT' highlights the word 'CONTENT' in the summary card.

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”:

The screenshot shows a search interface with three main sections: 'Search for' (set to 'Records'), 'Search by' (set to 'Document Content'), and 'Matching criteria' (set to 'platypus'). Each section is highlighted with a box.





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
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.

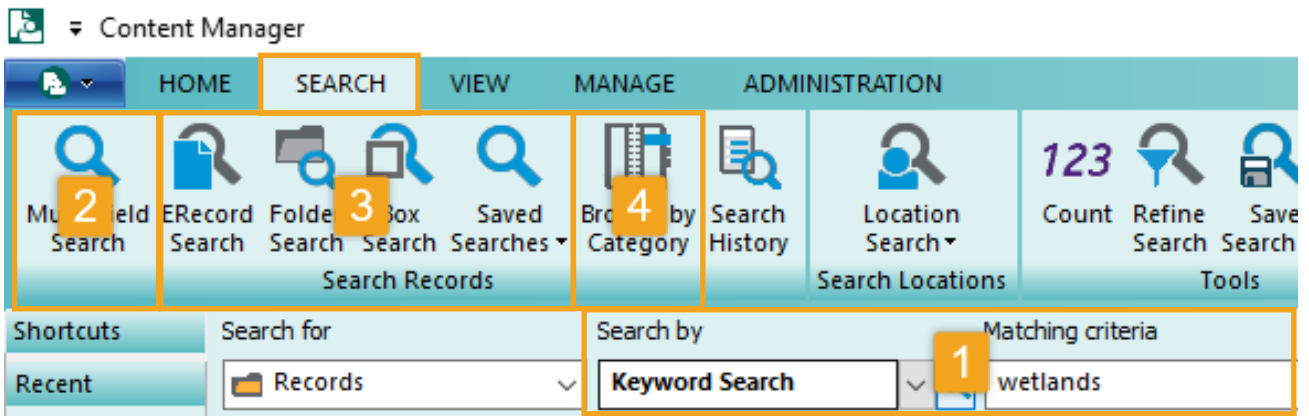




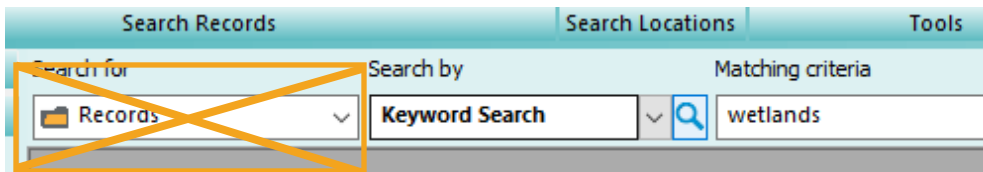
Search Options

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

<p>1. Search by one parameter</p> 	<p>2. Search by multiple parameters</p> 	<p>3. Use a pre-built search form or saved search</p> 	<p>4. Browse through records by category</p> 
--	--	---	---



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





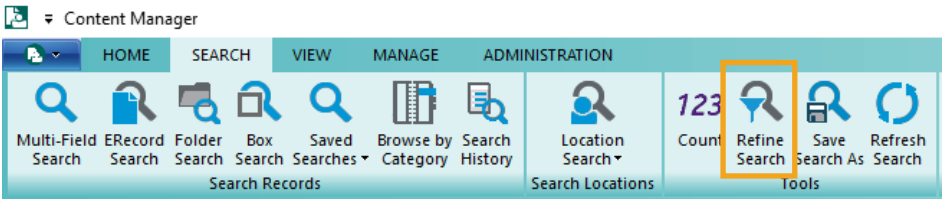
Content Manager Guidance

Search Manual

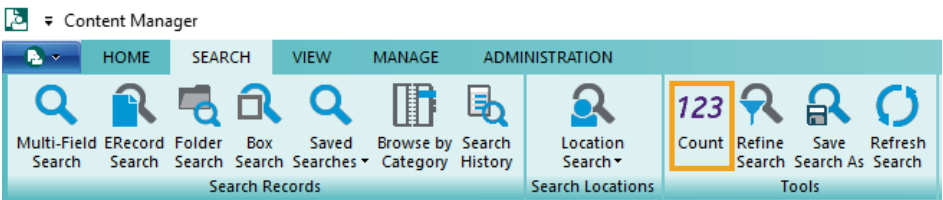
Search Tools

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

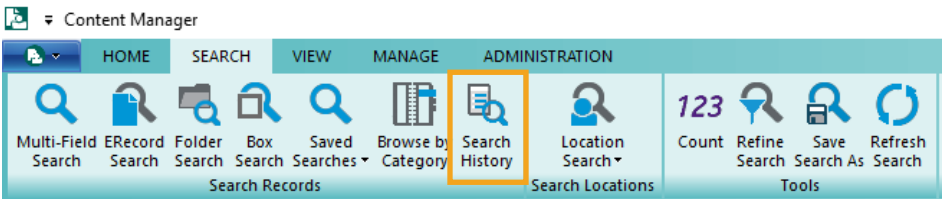
Refine Search button (or **F7**) – use this button after searching to change or narrow down a search.



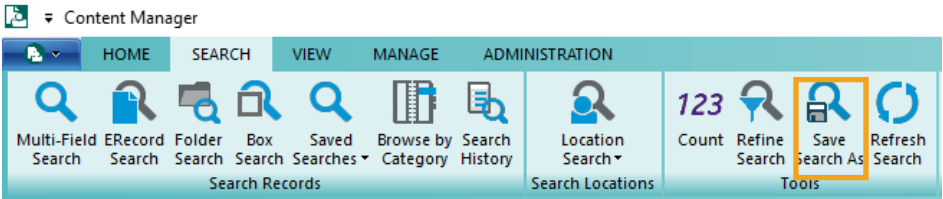
Count button (or **F6**) – use after performing a search to see how many records were located from your search.



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 in your group!)

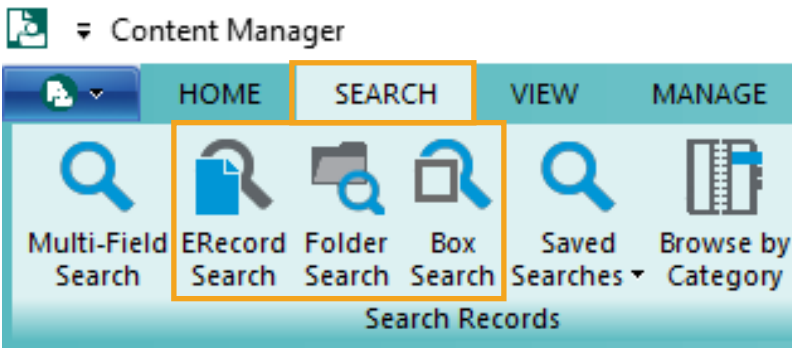




Search Forms

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.





ERecord Search Form

- Keyword Search** = any word from the content, title or other metadata
- Title Word** = any word from the title of the record
- Notes Word** = any word from the notes of the record (optional field)
- Author** = name of the person that created the record or sent the email
- Checked in By** = name of the person that filed the record
- Date Created** = date the original record was created
- Date Filed** = date the record was filed
- Extension** = denotes type/format (e.g. msg, pdf, docx)
- Container** = name of the folder where the record is located
- Category** = title of the retention category assigned to the record
- Owner** = name of the agency that owns the record

Folder Search Form

- Keyword Search** = any word from the title, notes or other metadata
- Title Word** = any word from the title of the folder
- Notes Word** = any word from the notes of the folder (optional field)
- Creator** = name of the person that created the folder
- Date Filed** = date the folder was created in the system
- CutoffDate** = date the records become inactive
- Record Number** = number auto-generated by Content Manager
- Container** = name of the parent folder or box (only relevant for subfolders or physical folders)
- Category** = title of the retention category assigned to the records
- Owner** = name of the agency that owns the records in the folder

Box Search Form

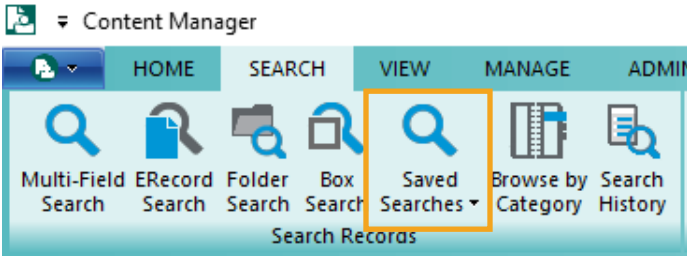
- Keyword Search** = any word from the title, notes or other metadata
- Title Word** = any word from the title of the folder
- Notes Word** = any word from the notes of the folder (optional field)
- Creator** = name of the person that entered/created the box
- Date Filed** = date the box was entered/created in the system
- CutoffDate** = date the records become inactive
- Record Number** = number auto-generated by Content Manager
- Agency Number** = optional number entered by user
- Category** = title of the retention category assigned to the records
- Owner** = name of the agency that owns the records in the folder
- RCAccessionNumber** = number assigned to the records when added to Records Center storage (e.g. 21-485)
- RCLegacyLocationNumber** = number from old box transmittal forms (e.g. 110-03-040)



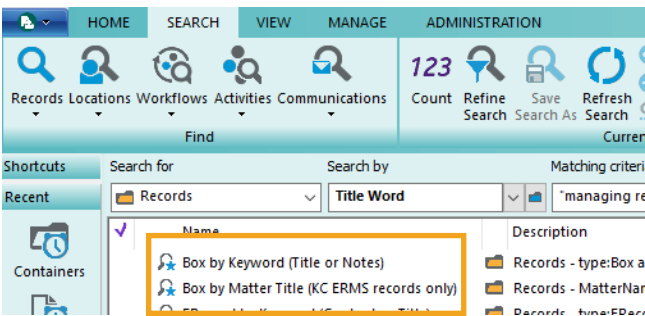


Saved Searches

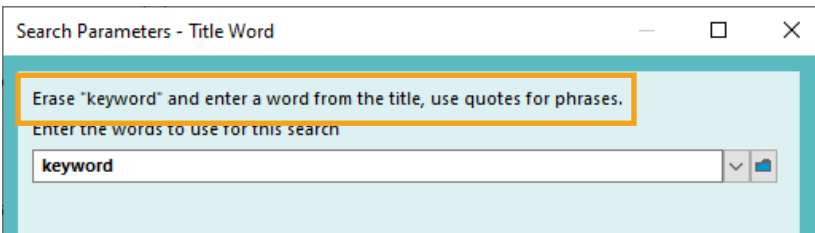
Saved Searches are pre-built searches using common search parameters; they are a great resource for new users.



All available saved searches will be displayed. Choose the correct search and **double click** to run it.



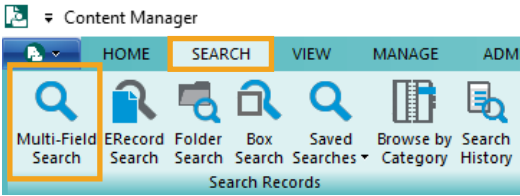
Certain searches will provide **unique instructions** which will be listed at the top of the window.



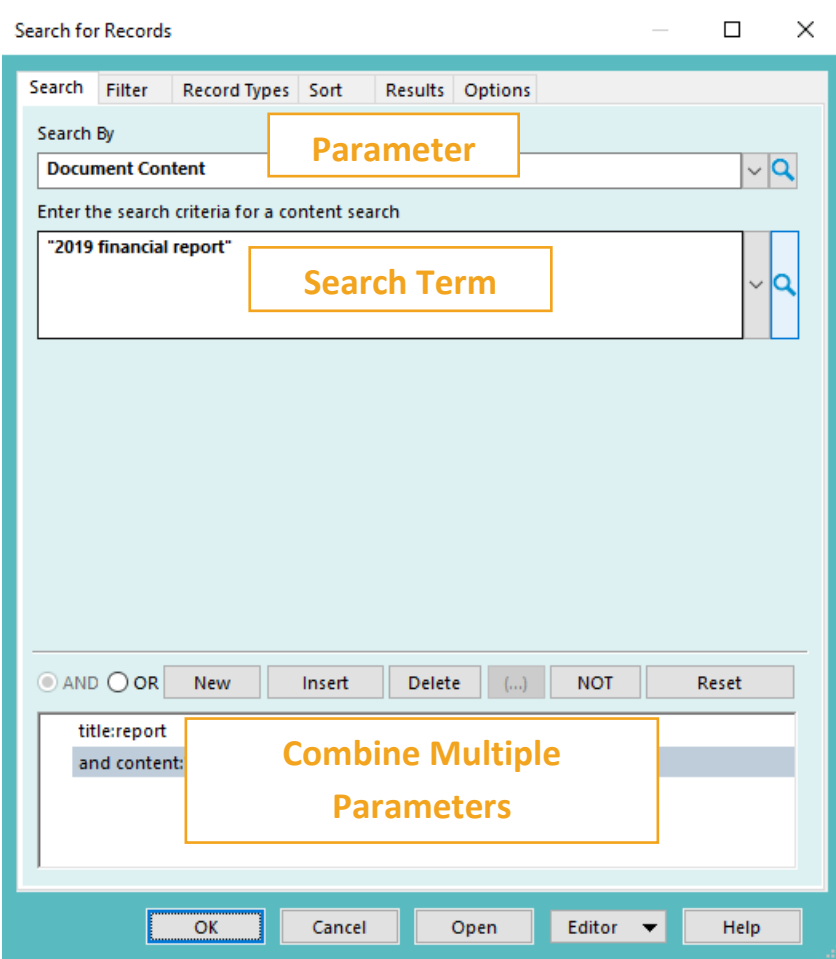


Multi-Field Search

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



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

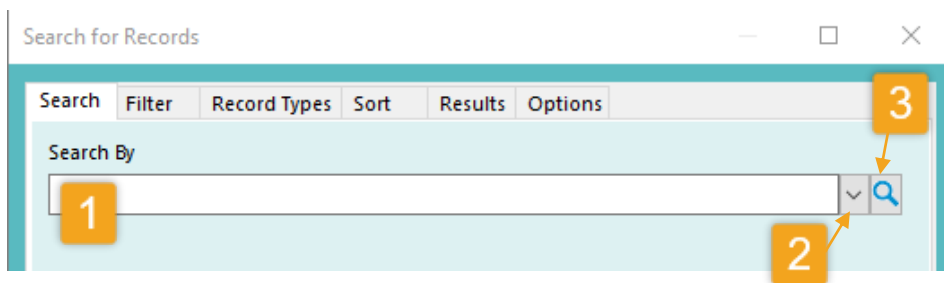




Choosing a Search Parameter

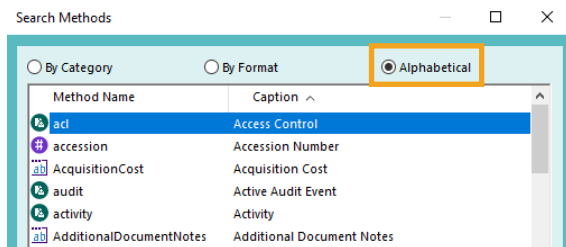
When doing either a Basic Search (one parameter) or an Multi-Field Search, you **must** start by selecting a search parameter (“Search By”). This means is that you are telling the system *where to look* to perform the search (i.e. which field or table you want to search in). The search parameter is selected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

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



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)



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 created in or filed to the system
7. **Date Created** – date the record was originally created, sent, or received (ERecords 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, Record Number)

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 word or number contains any **punctuation** (for 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” to return the most accurate results.

Partial words? Use wildcards * or ?

* for **any number** of characters

Search By

Record Number

Choose operator and enter string value to search for

Matching B432*

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

or use ? for just **one** character

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 criteria for a content search

receipt AND unapproved

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





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 to date for a range search

Matching

[And Up Until]

Date range – enter the date range in the two fields

Search By

Date Filed

Enter a date and optionally a to date for a range search

Matching

[And Up Until]

Blank date – just erase all dates and search

Search By

Date Filed

Enter a date and optionally a to date for a range search

Matching

[And Up Until]

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

Search By

Date Filed

Enter a date and optionally a to date for a range search

Matching

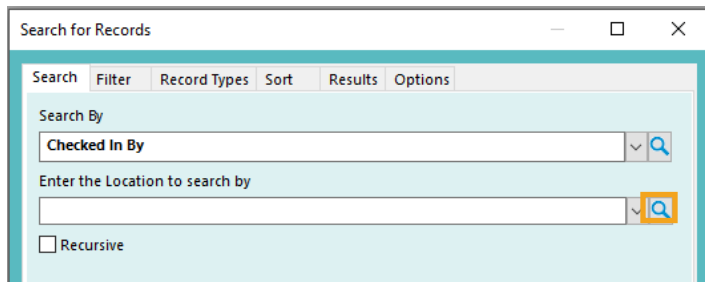
[And Up Until]



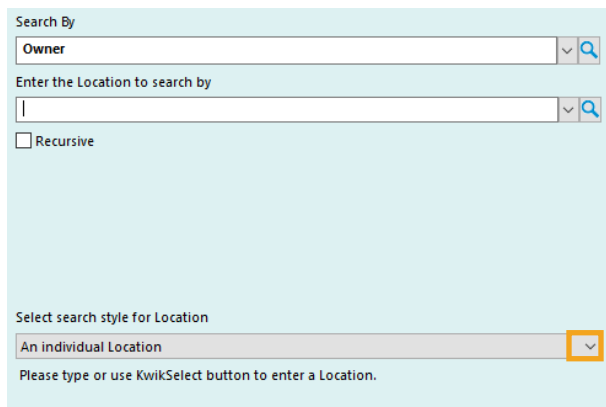


“Controlled” Search Parameters (Categories, Owners, all names, etc.)

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



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



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.

The screenshot shows a search interface with the following elements:

- Search By:** A dropdown menu with "Owner" selected.
- Enter the Name of the Location you wish to search by:** A text input field containing "DCHS*" with a magnifying glass icon to its right.
- Recursive:** A checkbox that is currently unchecked.
- Select search style for Location:** A dropdown menu with "Locations with matching text values for Name" selected.

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.

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)

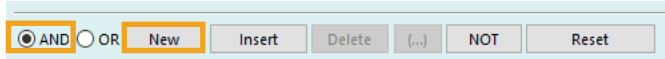




Combine Multiple Parameters

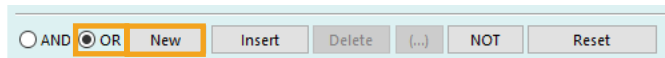
The row of buttons in the middle of the Advanced Search window are used to build a search with multiple parameters.

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



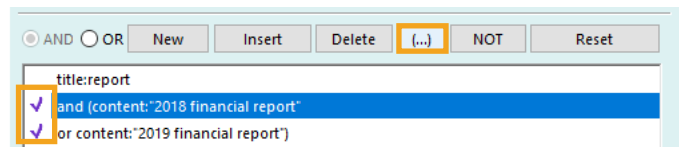
Select **AND** then click **New**. This creates a duplicate of the search parameter you've selected. Now, go back up to the top to select the new Parameter and Search Term for what you just added, erasing the duplicate text listed. *Note that AND is the default option and you don't need to select it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

When you want to search for **either** of the parameters:

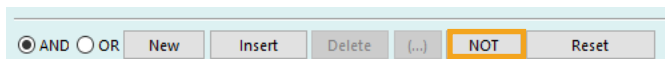


Select **OR** and then click **New**. Then go back up to the top to select the Parameter and Search Term for what you just added.

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.



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



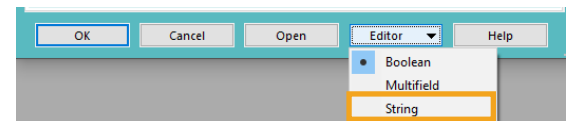
Select NOT. Then go back up to the top to select the Parameter and Search Term that you just added, then your results will include the opposite. For example, if you use the Parameter "Title Word" and enter the search term "miscellaneous", it will return all records that do not have the word miscellaneous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





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?

Use the below formulas:

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

Enter the search criteria for a content search

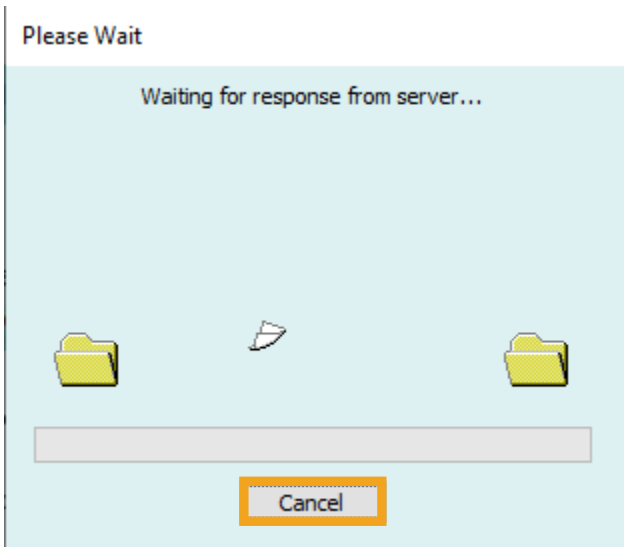
(doc*):TS_EXTENSION AND (version):TS_TITLE AND (*maintenance crew*):DRECONTENT



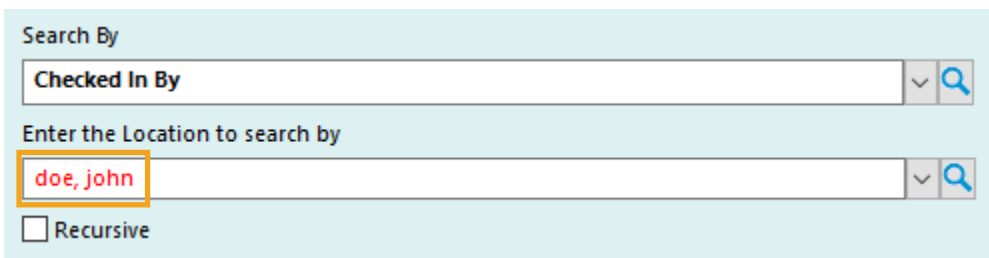


Search Troubleshooting

Waiting for response from server... – If your search results in the below “Please Wait” window, it means that it is taking longer than normal. 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.



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.

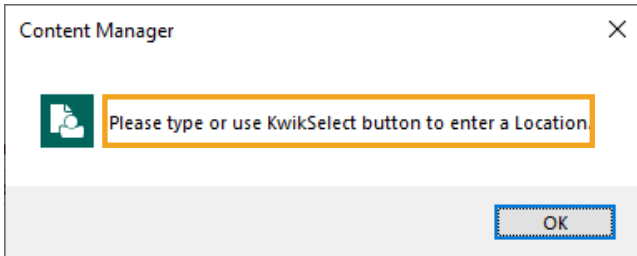




Content Manager Guidance

Search Manual

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.



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.

