Content Manager Guidance
## Search Overview

In Content Manager, there are various available options to search for records. **All records in the system –** including their content and metadata (or information about them) **– are 100% searchable**.

Four search options:

1. Search by **one parameter**	2. Search by **multiple parameters**	3. Use a pre-built **search form** or **saved search**	4. **Browse** through records by category
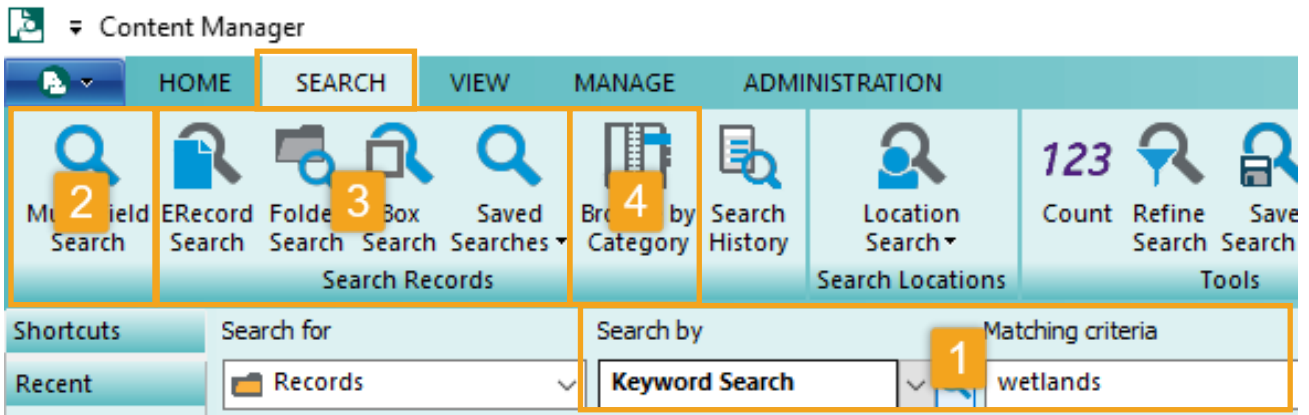
Most common search parameters:

Keyword Search – any word(s) from the content, title, notes, and 10+ other metadata fields; can be used with boolean syntax "AND," "NOT," "OR"

Record Number – unique number of the record, auto-generated by the system

Date Filed – date the record was created/entered in or filed to the system

Date Created – the date the record was originally created, sent or received (*Erecords only*)

Record Type – narrow down to a specific type/format of the record: Box, Digital Folder, ERecord, etc.

In space – whether the box is in the Records Center or not (*Boxes only*)

Checked in by – the name of the person that filed the record (*ERecord only*)

Creator – the name of the person that created the record (*Boxes or folders only*)

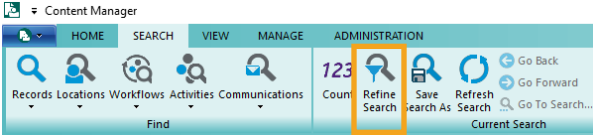*For other search parameters not included above, refer to the Search Fields Crosswalk job aids.*
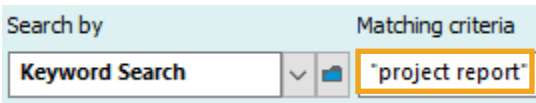
Content Manager Guidance
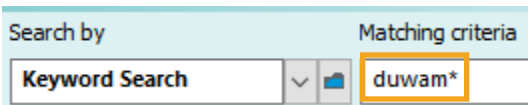## Search Overview

Other tools and hints:

1. **Refine Search** button (or **F7**) – use this button after searching to change or narrow down a search.
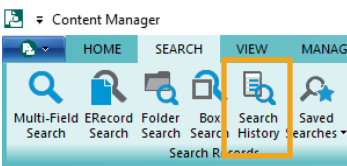
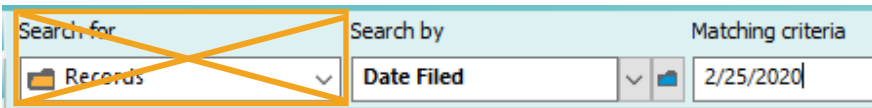2. Use **quotes** for phrases or hyphenated words/numbers (e.g. "project report," "552-555-554").

3. Use **wildcards (asterisks)** for partial words (e.g. duwam*).

4. Use **Search History** – Review all your past searches. (Search History available after performing a search)

5. **Do not** change the **Search for** setting if using the one-parameter search.

Pro Tips!

- ✓ Before searching, determine what you already know about what you are trying to find:
  (i.e. **keywords**, **numbers**, **formats**, **date ranges**, **user names**, etc.)

- ✓ Following **consistent folder structures** and **naming conventions** across your organization will help to imply searching in the future.