

Advanced Searching

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iManage WorkSite Express Search provides state of the art search technology that is both powerful and easy to use. Two tools are available: **Express Search** and **WorkSite Miner**.

Express Search

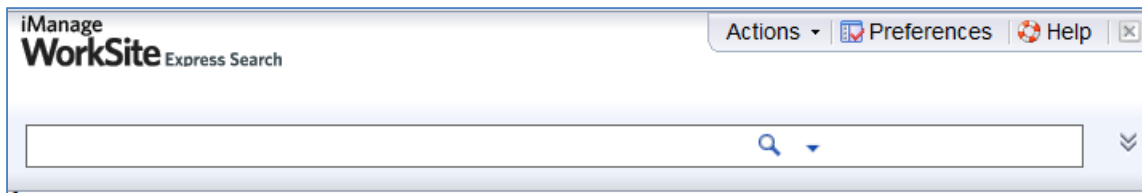
Express Search is a client application that opens a floating search bar on your windows desktop. It enables you to quickly search for WorkSite content, no matter what application you are currently using.

Opening and Closing Express Search

By default, you can launch Express Search from the Windows Start Menu:

Start -> All Programs -> Autonomy -> iManage Express Search.

The floating Express Search window will open.

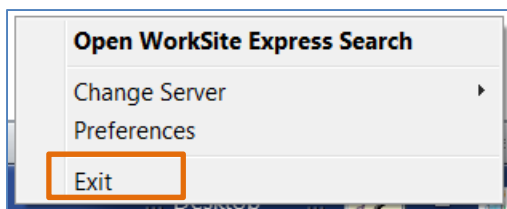


The Express Search icon also appears in the Windows system tray.



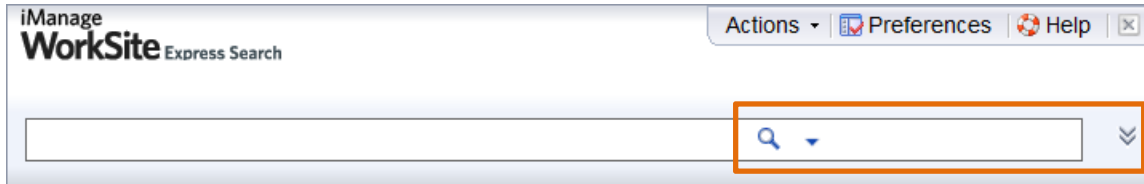
As long as the Express Search icon remains in the system tray, you can open or close the Express Search window at any time by pressing the **CTRL key twice**. This is the default key stroke and can be customized in the Preferences.


To shut down Express Search, right click on the icon in the system tray and click Exit.



Search Control and Button Bar

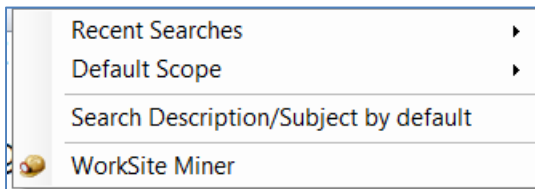
The **Search Control** consists of three buttons on the right hand side of the window.



Click on the magnifying glass to perform a search on the criteria entered. As soon as you begin entering text, the icon changes to the Clear Search icon .



The Show Search Menu icon displays the following options:



Recent Searches – displays a list of your recent search criteria.

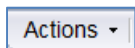
Default Scope – select the databases you wish to search.

WorkSite Miner – opens up WorkSite Miner.

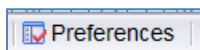


The signet button opens the query builder which allows you to create a query using a form based interface.

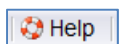
The **Button Bar** consists of the following buttons above the input field:



Enables you to perform actions on selected items in the search results list. The Actions menu is inactive when there are no search results displayed.



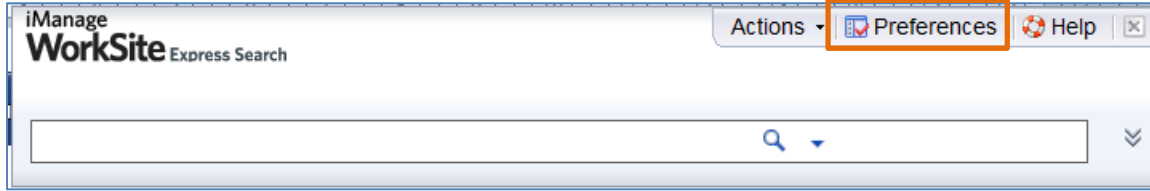
Enables you to change certain features of how Express Search looks and operates.



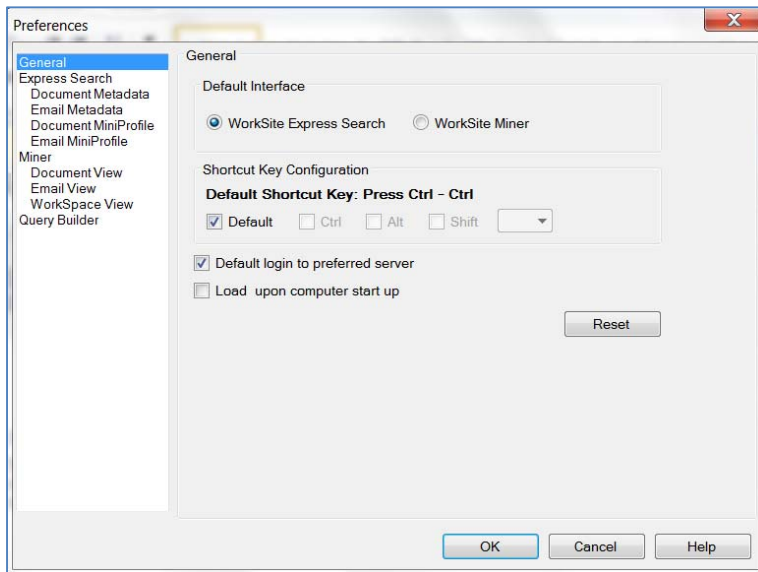
Launches the online Help for Express Search.

Preferences

To change general preferences, click the Preferences button on the Express Search window.



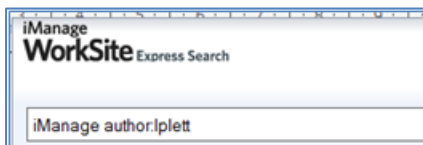
The Preferences window opens. Select an item on the right to make changes to specific preferences for Express Search and the WorkSite Miner.



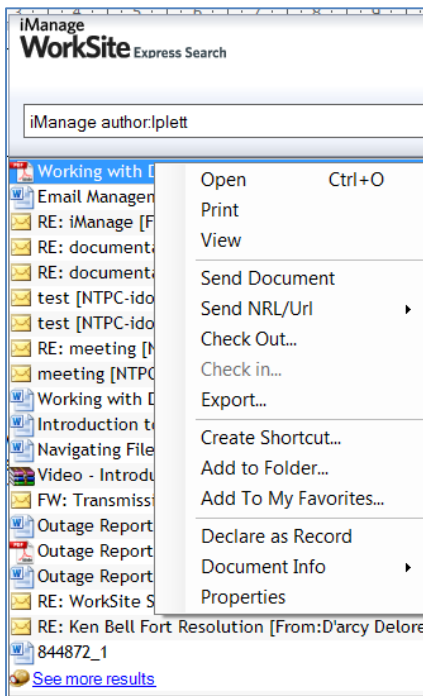
Searching with Express Search

To run a search query:

1. If the Express Search window is not open, press the **CTRL key twice** (or whatever key stroke combination you've configured in the preferences).
2. Enter a search term or use the autocomplete feature to add a search query.



3. By default, 2 seconds after you stop typing, iManage will automatically trigger a search for you. You can also press ENTER to trigger the search immediately.
4. The results of the search display in the search result list up to the maximum number defined in the Preferences dialog box.
5. To open a document from the search results list, double click on it or select it, click the **Actions** menu and click **Open**. Many FileSite commands are available from the menu accessed by right clicking on the document.



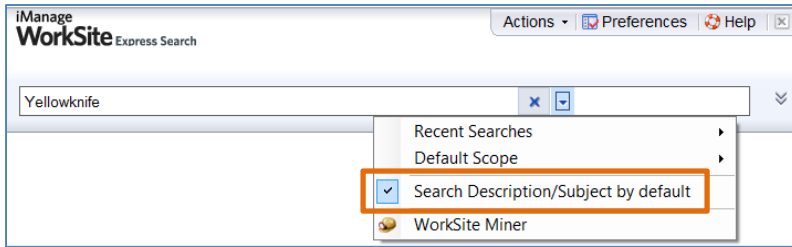
6. Click on the **See more results** link to open the entire result set in WorkSite Miner.

Entering Search Criteria

There are several methods of entering search criteria:

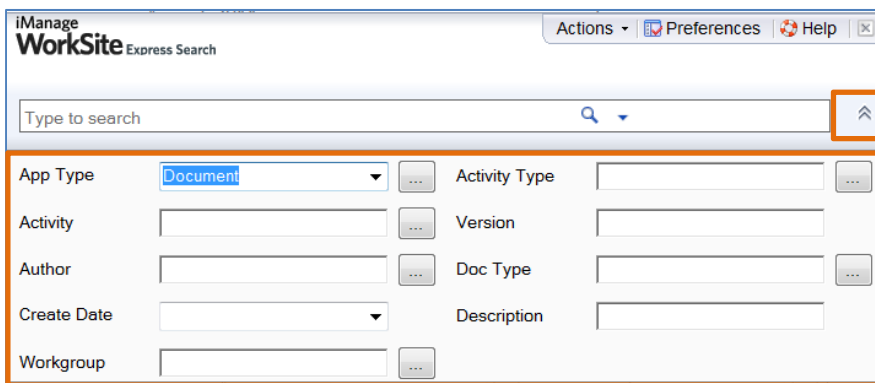
1. By default, if you enter a string of characters in the search query box, iManage will perform a full text search.
2. If you click the **Show Search Menu** icon and select the option **Search Description/Subject by Default**, iManage will perform the search against the Description of the document or against the subject of an email.

For example, we enter the word Yellowknife in the query box.



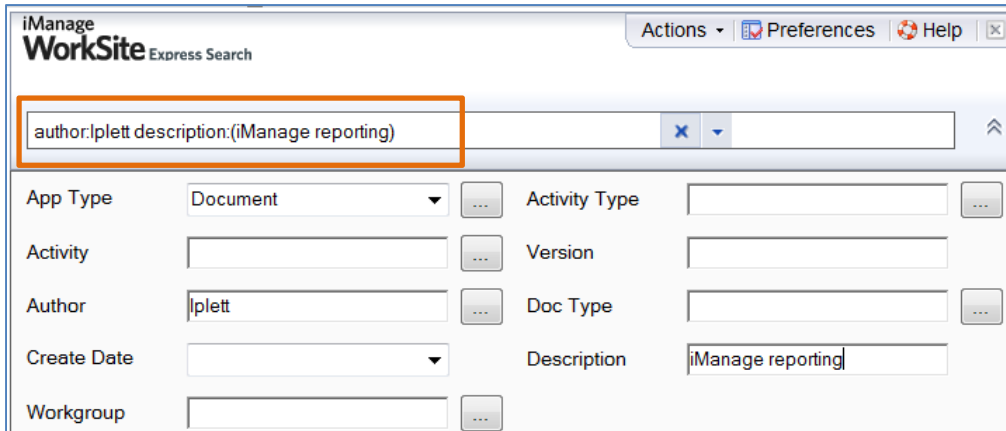
- When the option, **Search Description/Subject by default** is unchecked, iManage would perform a content search on all documents for the word Yellowknife.
- When the option, **Search Description/Subject by default** is selected, iManage would perform a search against the description or subject of all documents and emails for the word Yellowknife.

3. Click the signet button to open and close the Query Builder.



Query Builder helps you construct complex search queries using a form-based interface. A lookup button next to a field enables you to populate that field with valid criteria.

As you enter text in Query Builder fields, a search query is automatically assembled for you. The assembled query is displayed in the search field in the Express Search main window. You can configure which fields are displayed in Query Builder in the Preferences window.

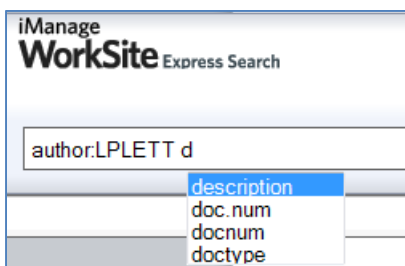


4. **Keywords** can be used to search on specific FileSite document properties such as the **Author** or the **Application Type**. The Query Builder automatically adds the keywords to the query for you when you enter criteria in the form. But, to perform searches quickly, you can bypass the Query Builder and manually enter keywords and your search criteria in the query box.

The syntax to denote a keyword is to include a colon (:) after the word and then the search term. For example, to search for all documents that were authored by user LPLETT, enter the query:

author:LPLETT

The query box uses autocomplete to assist you in entering keywords and search terms. Start typing the letter 'd' and all possible keywords will be listed. Select one with your mouse or with the arrow and tab key. Then enter the criteria following the colon.



The following is a list of the most common keywords:

author	comments	filesize	owner	to
activity	createddate	from	received	version
activitytype	description	hasattachment	scope	workgroup
Bcc	docnum	modified	sent	year
box#	doctype	operator	site	

Search Syntax Examples


Search Type	Example	Result
Full text search	power plant	Returns all documents containing both power and plant in the content of documents
Full text search	“power plant”	Returns all documents containing the phrase <i>power plant</i> in the content of documents
Full text search	Yellowknife author:LPLETT	Returns all documents with Yellowknife in the content and authored by user LPLETT
Full text search	Yellowknife author:LPLETT;GSMITH	Returns all documents with Yellowknife in the content and authored by user LPLETT or GSMITH
Workspace search	type:ws Yellowknife	Returns all workspaces with the word Yellowknife in their name
Search using email fields	from:lplett@ntpc.com	Returns all iManaged email documents that were sent from the email address lplett@ntpc.com
Search using date fields	created:this week author:LPLETT	Returns all documents created this week authored by user LPLETT
Search using Booleans	type:email hasattachment:TRUE	Returns all email documents with attachments
Search using Operators	Version:>5	Returns all documents with version numbers greater than 5

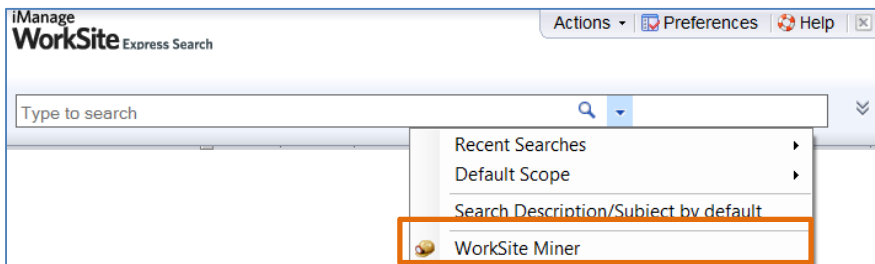
WorkSite Miner

WorkSite miner is a tool that enables you to quickly find the right content within a large set of returned search results. It enables you to sort search results or group them by a particular field or a set of fields.

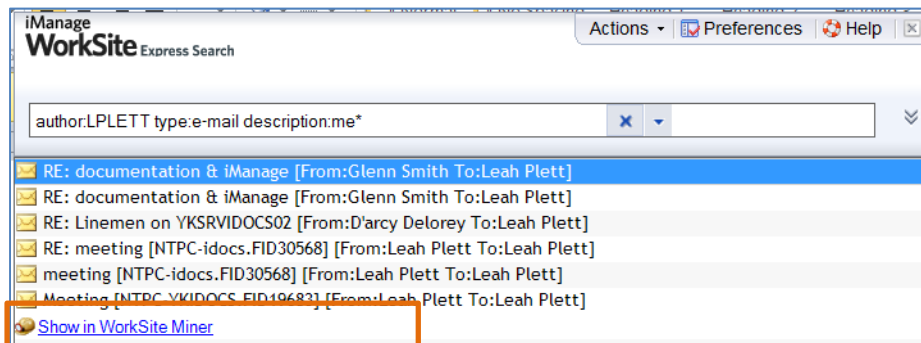
Launching WorkSite Miner

Miner can be launched in one of three ways:

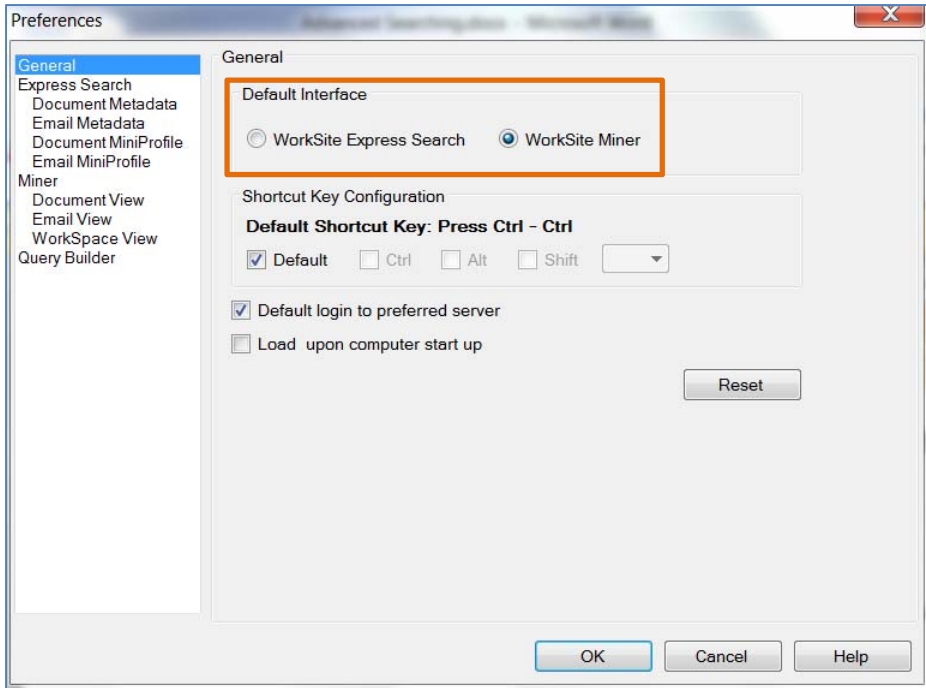
1. Click the **Show Search Menu** button  on the Express Search main window and select WorkSite Miner.



2. Click the **See more results** link at the bottom of the Express Search search results list.



3. Set WorkSite Miner to open by default when you launch Express Search. This is done from the Preferences window.



Working with Search Results in Miner

You can manipulate the items in the Miner's document grid by filtering, sorting or grouping them. These operations help to adjust your view of the result set to help you locate the right information more quickly.

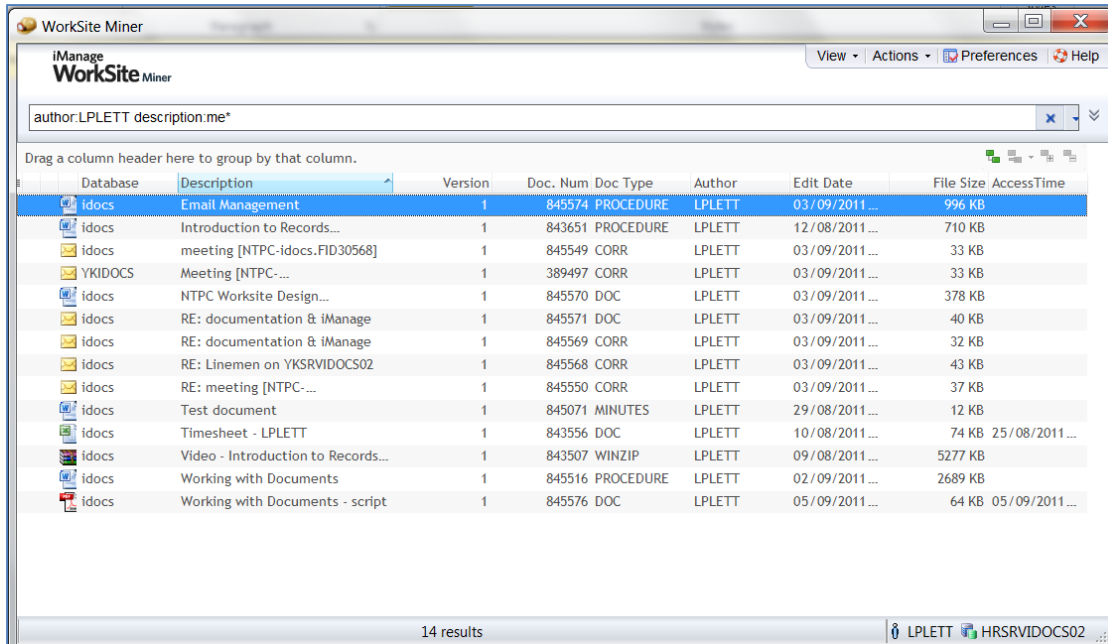
Filtering Search Results

Filtering search results means to change the focus of your search by changing certain search criteria based on the results shown in the document grid. You filter a search results by typing more information in the search query on by selecting further criteria from the Query Builder.

Sorting Search Results

You sort search results in Miner by clicking on column headings.

For example, click the column heading Description to sort the documents alphabetically by their description.



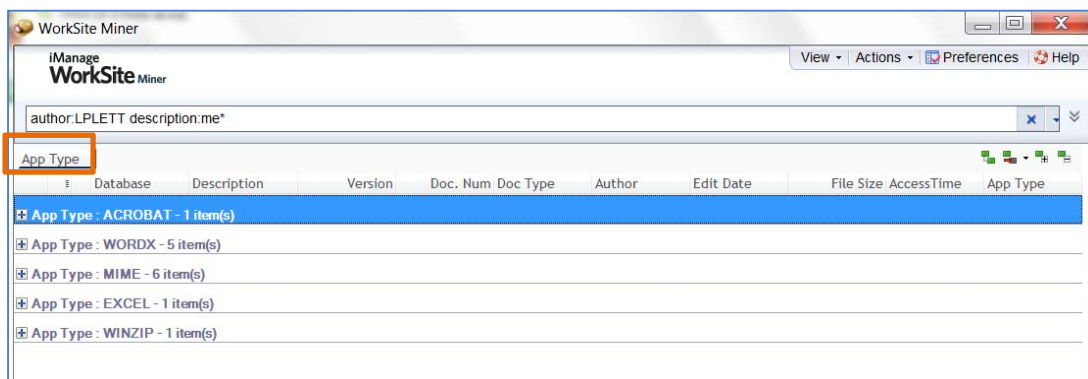
Grouping Search Results

Grouping search results means to arrange the search results in the document grid according to the type of information.

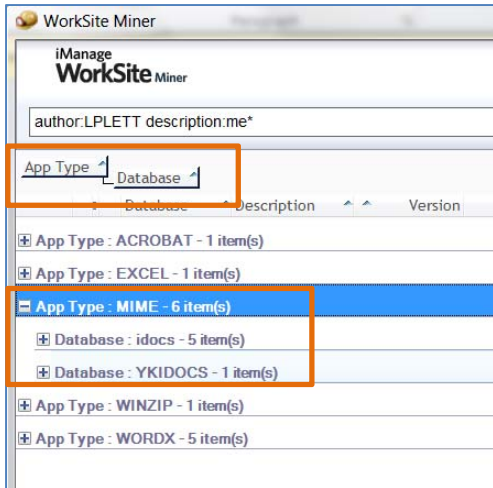
To group search results do one of the following:

1. Drag a column with header into the **Drag a column header...** area immediately above it.


For example, I've dragged the App Type column into the header area to group all the documents by their primary application.

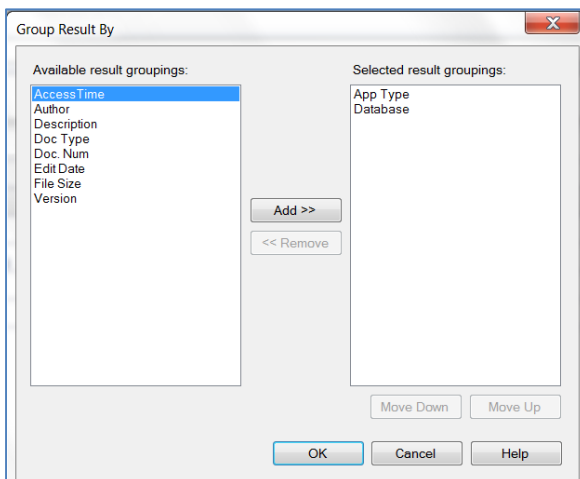


You can add as many groupings as you like. Using the above example I can then drag the Database column into the grouping area. It will group all documents first by App Type and then by Database.



To ungroup, drag and drop the column name anywhere outside of the header area to ungroup by that column.

2. Click the **Group Results By** button . The Group Results By window opens. Select a column to group on the left and click the Add button. Use the Move Up and Move Down buttons to organize your groups. Click a column in the Selected result groupings area and click the Remove button to ungroup by that column.



You can also ungroup by clicking the Ungroup button and selecting which column to ungroup.

