

Searching in FileSite

Table of Contents

- iManage Container Searches 2
 - Profile Information 2
 - Full Text Searching 2
 - Combining Profile and Full Text Searches 3
- Search Dialog Box 4
 - Accessing the Search dialog box 4
 - Components of the Search dialog box 5
- Entering Search Criteria 8
 - Profile Information Lookup Utility 8
 - Search Queries 9
 - Simplified Full Text Search 11
 - Search Results 12
 - Search Tips 12
- Saved Searches 13
- Microsoft Outlook Search 15

FileSite can perform fast and powerful searches for workspaces, folders, and documents based on profile information and/or full-text information.

There are 3 main types of searches you can perform in FileSite:

- iManage Container Searches
- Saved Search
- Microsoft Outlook Search

iManage Container Searches

You can perform searches for workspaces and documents based on profile information and/or full text information.

Profile Information

When you perform a search based on a document's profile information, also known as meta-data, you enter search criteria for certain fields of profile information. iManage returns documents whose profile information matches the criteria.

For example, Author is a document profile field that stores who created the document. Using the search below, iManage will return all documents for which user LPLETT is the author.

Search Dialog

Search for any or all criteria below.

Search Within
docs <HRSRVIDOCS02> Select

Restrict Search Return All Documents

Retrieve

Description

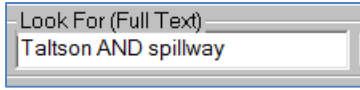
Document Number: Version:

Author: LPLETT <Leah Plett> Operator:

Full Text Searching

Full-text searching locates documents based on the occurrence of search terms or strings in the text of the document. These can be individual words, partial words, phrases, or sequential words. You can search for occurrences of these terms either in the contents of documents or in the text of certain profile fields, such as **Comment** or **Description**, and custom fields such as **From** and **To**.

For example, you might be searching for all documents that pertain to the Taltson spillway. You could do a full text search as shown below.

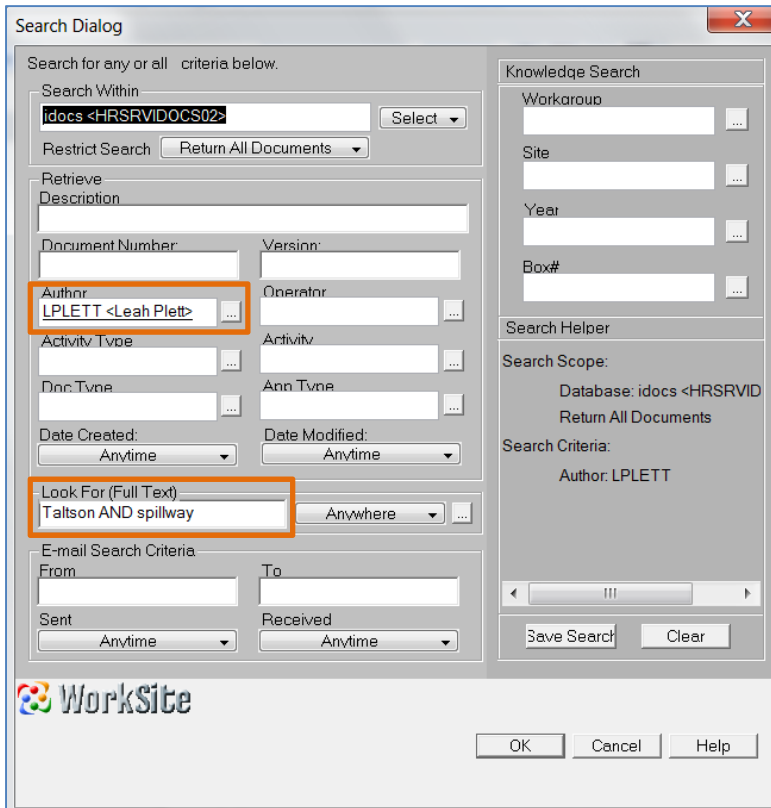


Look For (Full Text)
Taltson AND spillway

Combining Profile and Full Text Searches

A full-text search can be performed in conjunction with a search on profile information. The search returns documents that meet both the profile search criteria *and* contain the words or phrases specified by the full-text search criteria.

For example, combining the two examples above, this search would return all documents containing the word Taltson, the word spillway and was authored by LPLETT.



Search Dialog

Search for any or all criteria below.

Search Within:

Restrict Search:

Retrieve Description

Document Number: Version:

Author:

Operator:

Activity Type:

Activity:

Doc Type:

Ann Type:

Date Created:

Date Modified:

Look For (Full Text):

E-mail Search Criteria

From: To:

Sent:

Received:

Knowledge Search

Workaroup:

Site:

Year:

Box#:

Search Helper

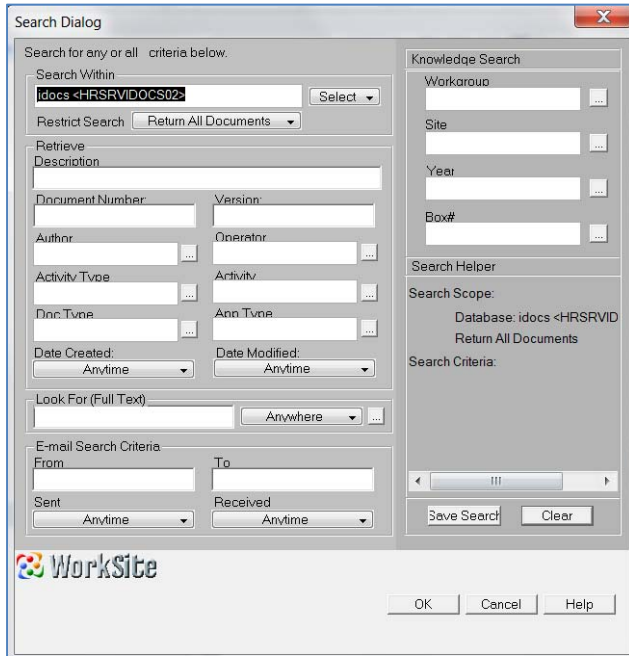
Search Scope: Database: idocs <HRSRVID> Return All Documents

Search Criteria: Author: LPLETT

WorkSite

Search Dialog Box

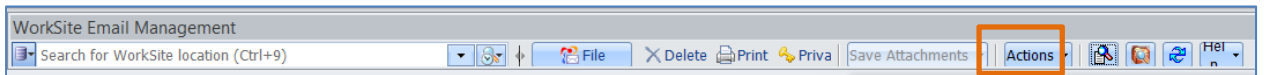
All iManage container searches are performed from the Search dialog box.



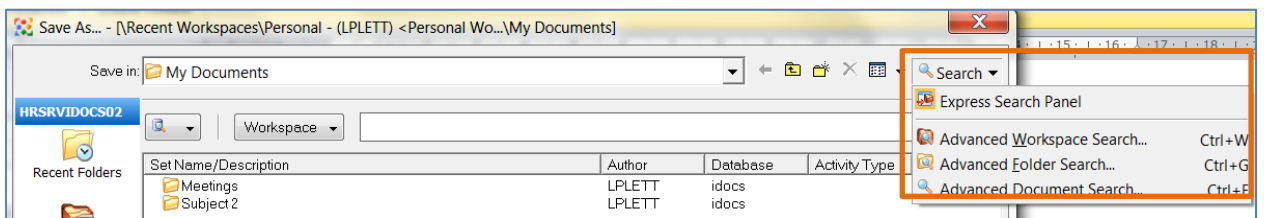
Accessing the Search dialog box

You can access the Search dialog box from several locations:

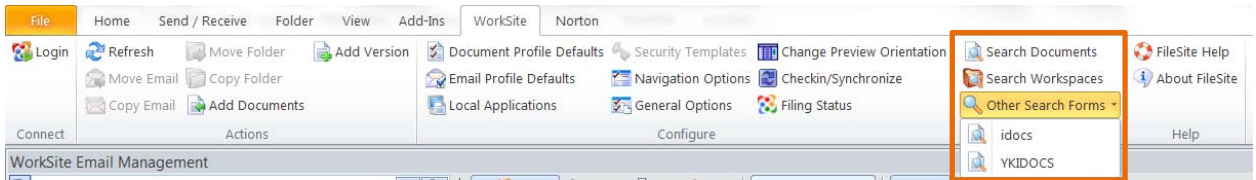
1. Click on the **Search Documents** or **Search Workspaces** buttons on the WorkSite Email Management toolbar. The Search dialog box for document search and workspace search look slightly different but the searching methods are the same.



2. From the Worksite Integrated Desktop window (accessed when opening or saving a document to iManage), click the Search drop-down button and select one of the Advanced Search options.



3. From the WorkSite menu bar in Outlook click one of the Search options available.

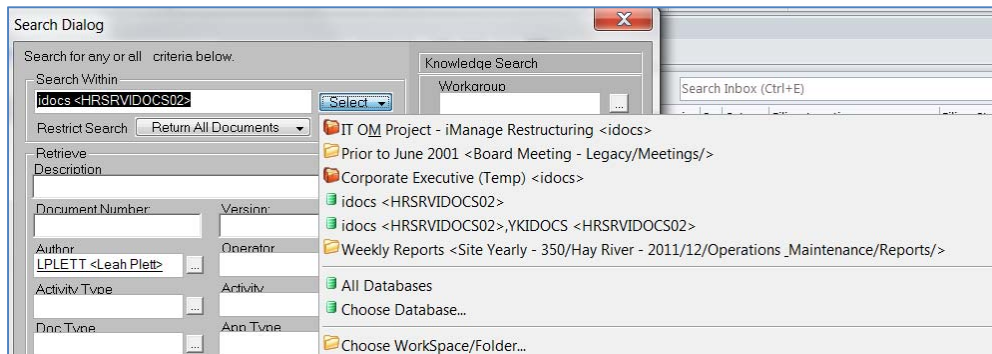


Components of the Search dialog box

There are several components to the search dialog box.

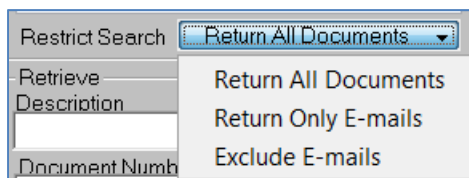
Search Within

The text box displays what container the search is restricted to. Click the **Select** button to make a selection. Choosing **All Databases** will search both *idocs* and *YKIDOCs* and will return the most results. To be more restrictive in your search, click the **Choose WorkSpace/Folder** option.



Restrict Search

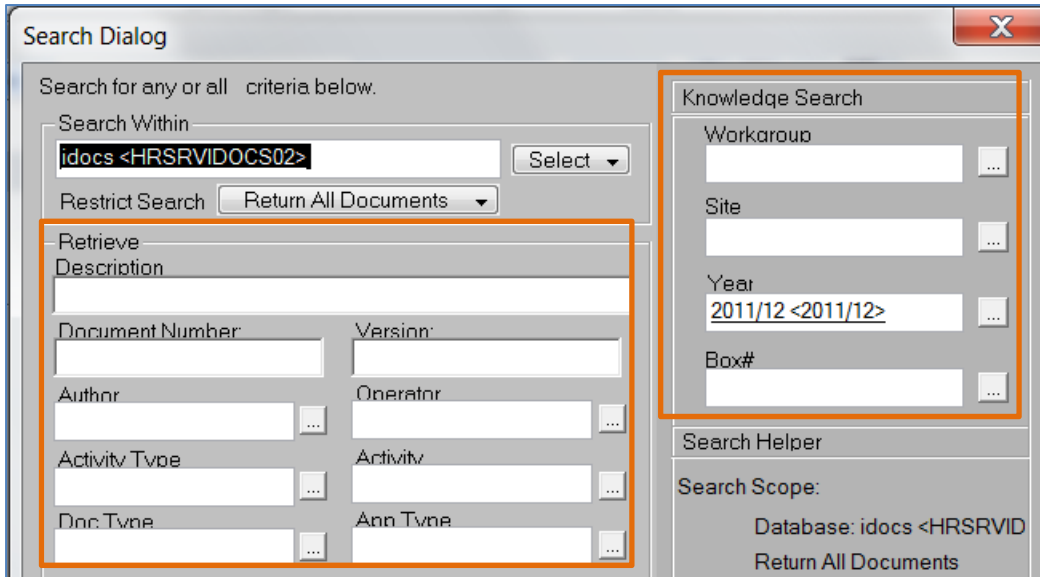
Click the drop-down arrow to search only documents, only emails or both.



Retrieve/Knowledge Search

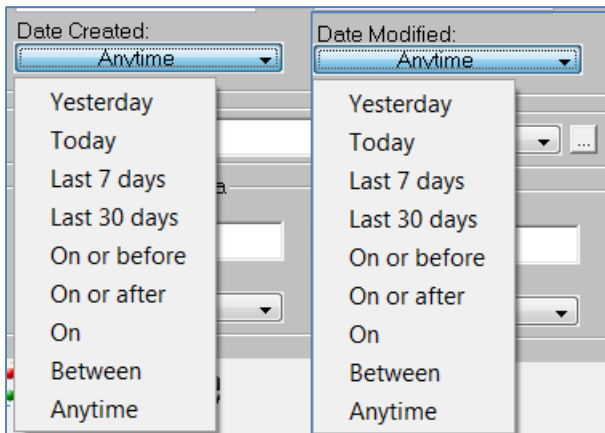
Select profile search criteria in the retrieve/knowledge search sections of the search dialog box. Some fields have browse buttons and require criteria to be selected (Author, App Type,

Workgroup) and others are free form text boxes where you will enter search queries (Description, Version).



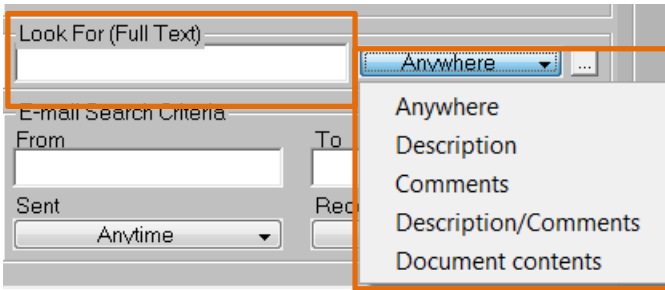
Date Created/Date Modified

Select from the the drop-down buttons to restrict your search by the date the document was created or imported or by the date the document was last edited.



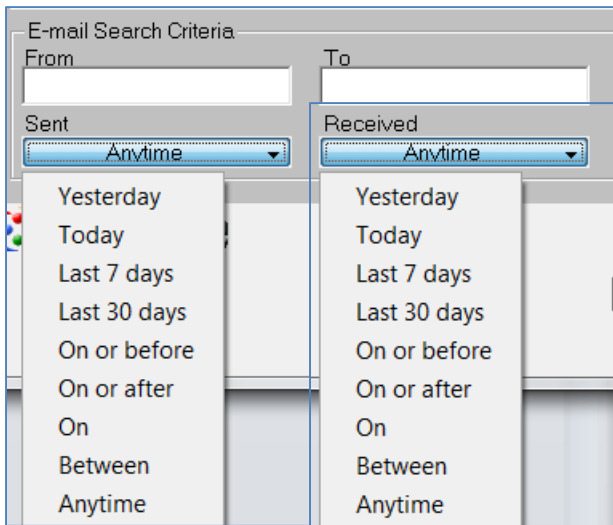
Look For (Full Text)

Criteria entered here will search the entire content of a document including the **Description** field and the **Comment** field. Click the Anywhere drop-down to select on what fields you want the full text search performed.



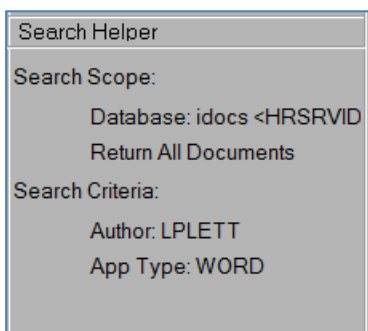
Email Search Criteria

Allows you to search on the **From** and **To** of email records in iManage. You can also restrict by the Sent and Received **dates**.



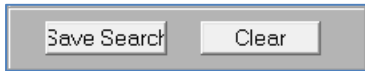
Search Helper

The **Search Helper** area of the Search dialog box shows you at a glance the information your search covers.



Save Search/Clear

Click the **Clear** button to clear out all the current search criteria. The Search dialog box remembers your last search so if starting a new search it's best practice to clear the window first. **Save Search** allows you to create a Saved Search folder. Every time you select the search folder in the Folder List, the search is performed again and any additional documents that meet the search criteria are displayed as contents of the folder.




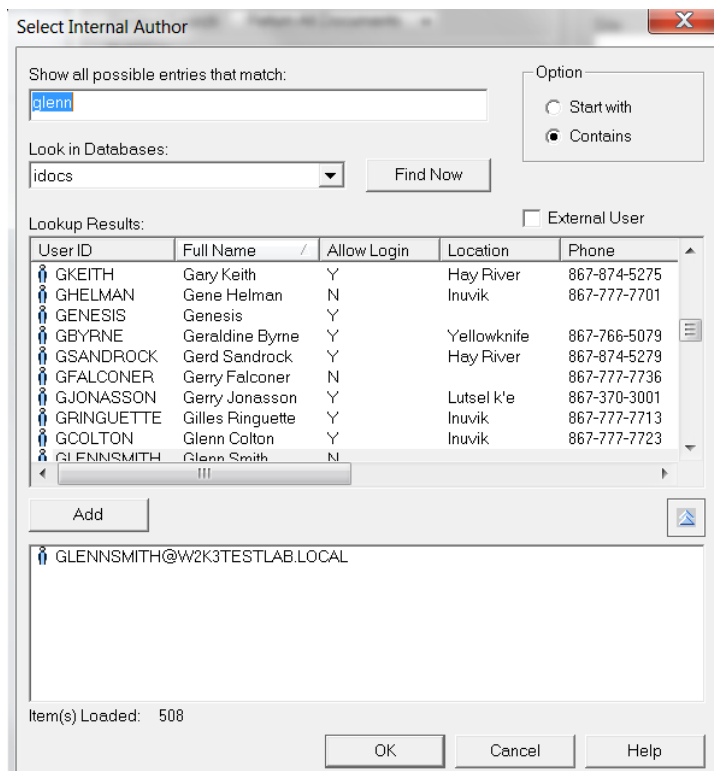
Entering Search Criteria

There are drop-down boxes, text fields and look up buttons on the search dialog box used for entering criteria.

Profile Information Lookup Utility

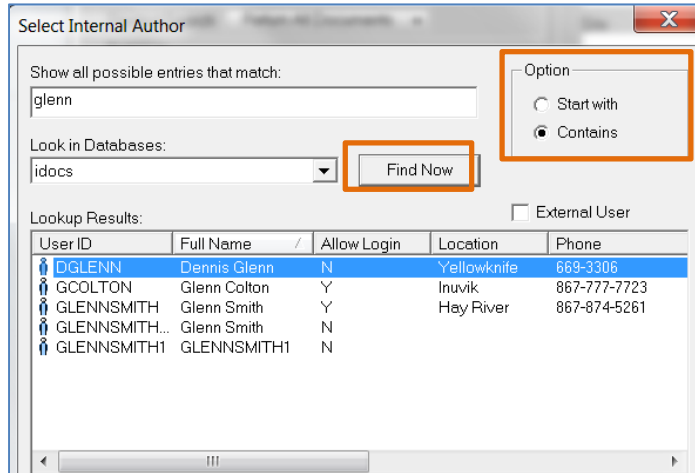
The best way to enter criteria for the profile fields is to use the lookup utility.

1. Click the Browse button  beside the field and the Select dialog window will open.



2. You can scroll down in the Lookup Results window to find the criteria you want. Single click it and click the **Add** button to add it to the bottom pane or double click on your selection.

3. If there are a lot of results in the Lookup Results window you can enter characters in the **Show all possible entries that match** text box. If you want to search for just the starting characters or if you want to search for those characters contained within the result, select the appropriate radial button from the Option area. Click **Find Now**.



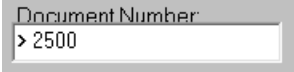
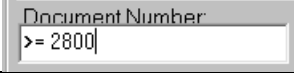


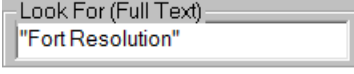
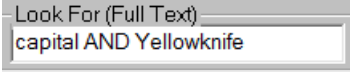
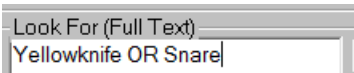
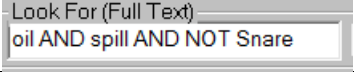
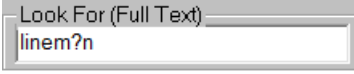
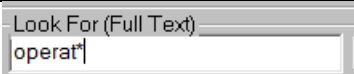
4. Once you have your selections made in the bottom pane, click OK.

Search Queries

Description, document number, version number and the Look For (Full Text) field are all free form text boxes where you enter a search query. A search query is made up of search **terms** and **operators**. **Terms** are individual words, partial words, and phrases and multiple terms can be combined using **operators**.

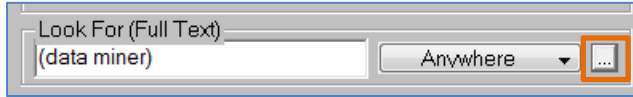
iManage ignores stop words such as, “a”, “an”, and “the” that are included in search queries. To forcibly include stop words in your search query, enclose them in quotes.

Different operators are used depending which field you are searching on. The following table shows the operator, a description of what it does, an example, and in which field you can use it.

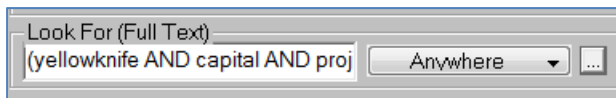
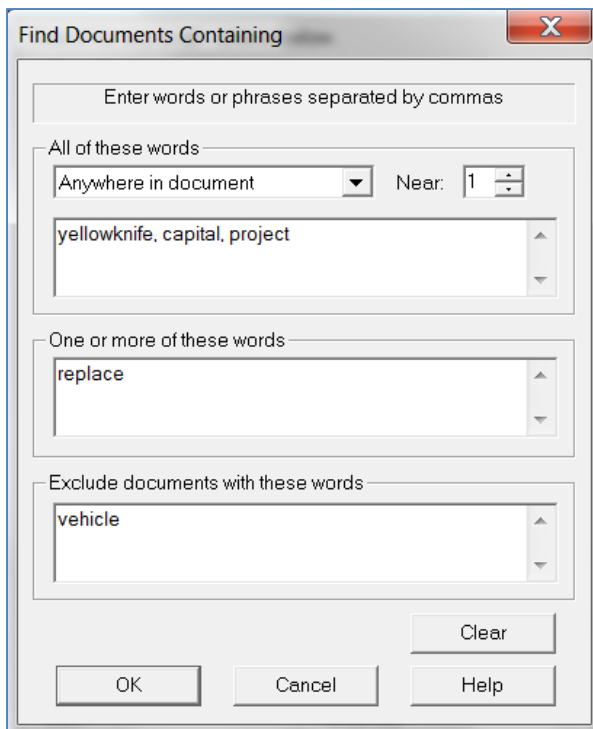
| Operator | Description | Example | Where Used |
|-------------------------------|--|--|-------------------------------------|
| > (Greater than) | The greater than sign is used to find documents that contain a value in a particular profile field that is greater than a specified minimum value. | To select documents with a document number greater than 2500, enter:  | Document Number Version |
| >= (Greater than or Equal to) | The greater than or equal to sign finds documents that contain a value in a particular profile field that is greater than or equal to a specified value. | To search for documents with a document number greater than or equal to 2800, enter:  | Document Number Version |
| < (Less than) | The less than sign is used to find documents that contain a value in a particular profile field that is less than a specified maximum limit. | To search for documents with a version number less than 3, enter:  | Document Number Version |
| <= (Less than or Equal to) | Like the greater than or equal to sign, the less than or equal to sign combines the searching power of the less than and equal to signs. | To search for documents with a version number less than or equal to 3, enter:  | Document Number Version |
| " " | The double quotation marks operator locates documents that contain an exact word or phrase. It is used to perform a literal search. | To find documents that contain the phrase Fort Resolution, enter:  If you do not use quotation marks, your results will include matches for fort and resolution. | Description Look For (Full Text) |
| AND | The AND operator locates documents containing both the terms on either side of it. | To find documents that contain the words Capital and Yellowknife enter:  | Description Look For (Full Text) |
| OR | The OR operator finds documents that contain at least one of the terms to which it is applied. It enlarges the search scope and is normally used to look for terms that have similar meaning or refer to similar subjects. | To find documents with one or both of the words Yellowknife and Snare, enter:  | Description Look For (Full Text) |
| NOT | The NOT modifier is used with the AND and OR operators, to exclude documents that contain a given term. Note: In order for the NOT modifier to work, you must first enter a positive search criteria. | To find documents that contain the words <i>oil</i> and <i>spill</i> but not the word <i>Snare</i> , enter:  | Description Look For (Full Text) |
| ? | The question mark (?) replaces any single alphanumeric character. Note: You can use more than one question mark within a term. Note: If you want a wildcard character to be interpreted as text and not as a wildcard, precede the character with a backslash (\). |  Would match the words lineman or linemen | Description Look For (Full Text) |
| * | The asterisk (*) is used as a wildcard operator to represent any number of alphanumeric characters (including none). Note: When using the asterisk wildcard, try to narrow the potential scope of the wildcard entry as much as possible. Note: If you want a wildcard character to be interpreted as text and not as a wildcard, precede the character with a backslash (\).B |  Would match the words operate, operation, operations, operator, operators, operating.... | Description Look For (Full Text) |

Simplified Full Text Search

A Simplified full-text search dialog box is available for users who do not wish to use the operators listed in the table above. Access this dialog box by clicking the **Lookup** button next to the **Look For (Full Text)** field in the Search dialog box.



Use this intuitive dialog box to create simple full-text search queries by entering words or phrases separated by commas into the appropriate fields. When you click OK, the query is shown in the Look For (Full Text) field with the appropriate operators.



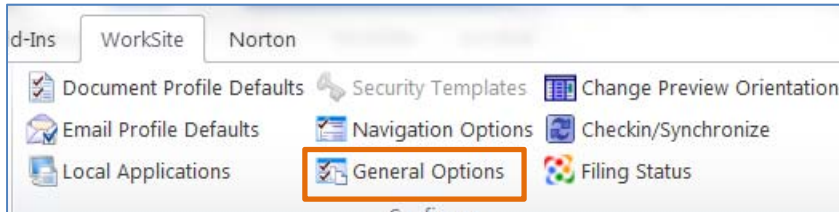
- In the first field, enter a list of terms which must **all** appear in the document in order for it to appear in your search results.
- In the second field, enter a list of terms only **one** of which must appear in the document for it to appear in your list of search results.
- In the third field, enter terms that should **exclude** a document from the search results if they appear in that document.

Search Results

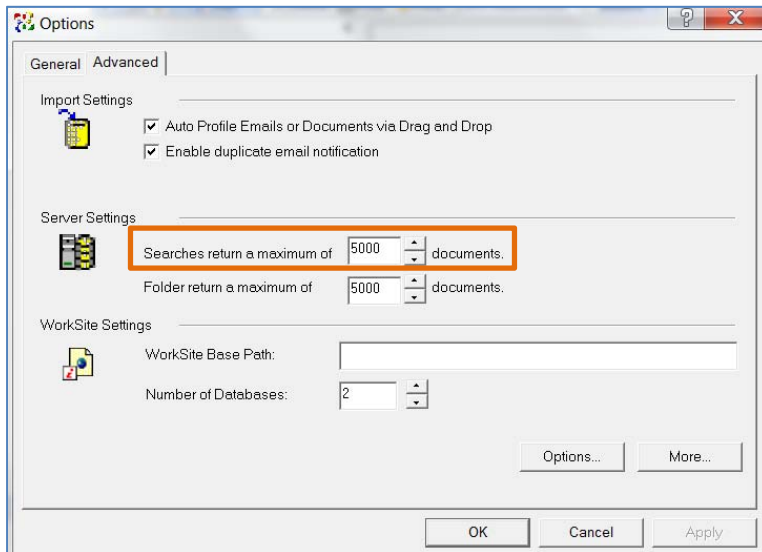
Once you enter your criteria and click OK, your search results will be displayed in the document grid.

The bottom left corner of Outlook will display the total number of documents returned in your search

Items: 5,000. By default, your FileSite is configured to display a maximum of 5,000 documents. You can modify this setting by clicking on the WorkSite menu bar and clicking the **General Options** button.



Click the **Advanced** tab and under **Server Settings** you can adjust the maximum documents returned during a search.



Search Tips

- Only the documents you have at least Read access to will be returned in a search.
- If you do not get the results you are expecting, you may have made your search too restrictive. Start general and then make it more restrictive by adding more criteria.
- Full text searching is performed by the indexer component of WorkSite. All documents added to iManage must be indexed for key words before they are text searchable. If you do not return a document in your search that you expect, consider that the document may be new or newly modified and not yet indexed.

Saved Searches

After you have entered search criteria in the Search dialog box, you can choose to Save the search to use at a later date. A saved search is a search folder with pre-defined search criteria. Every time you select the search folder in the Folder List, the search is performed again and any additional documents that meet the search criteria are displayed as contents of the folder. You can share these search folders with other users by adding them to the access control list.

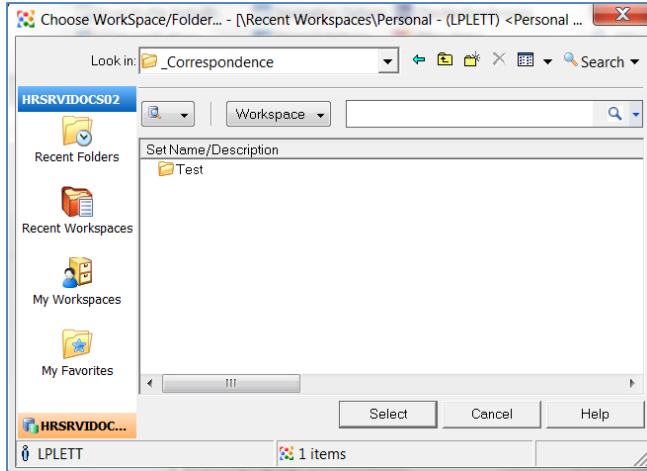
Performing a saved search involves the following steps:

1. Enter the criteria in the search dialog box. For example, I have chosen to search on only email documents with author LPLETT. I have also chosen to search both idocs and YKIDOCs databases.

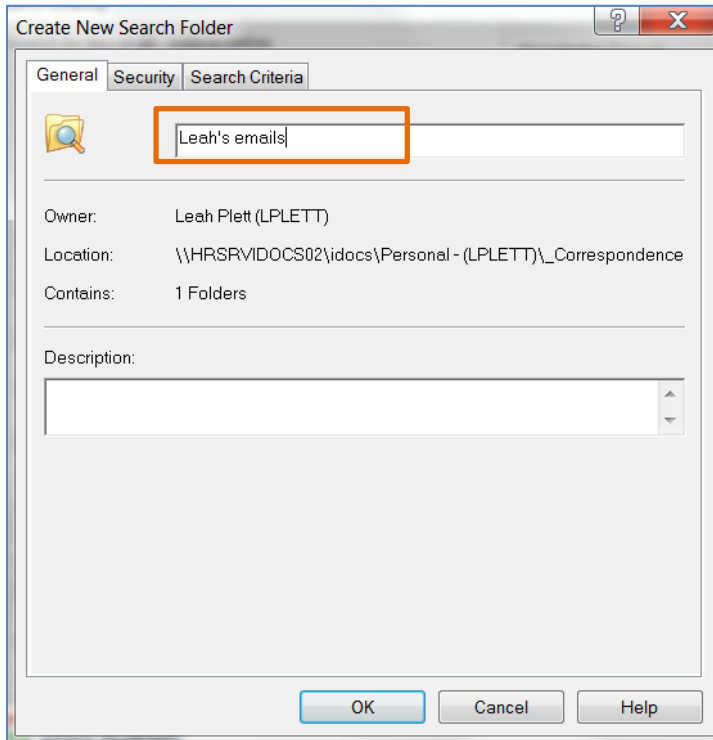
The screenshot shows the 'Search Dialog' window with the following details:

- Search Within:** idocs <HRSRVIDOCS02> YKIDOCs <HRSRV
- Restrict Search:** Return Only E-mails
- Author:** LPLETT <Leah Plett>
- Search Scope:** Database: idocs <HRSRVIDOCS02>, Return Only E-mails
- Search Criteria:** Author: LPLETT
- Buttons:** Save Search, Clear, OK, Cancel, Help

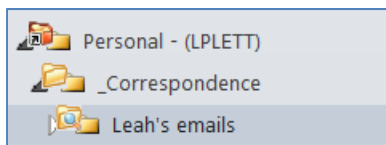
2. Click **Save Search**. The Worksite Integrated Desktop window opens. Select a location where you would like the folder to be saved and click Select.



3. The **Create New Search Folder** dialog box opens. Give your folder a name and click OK.

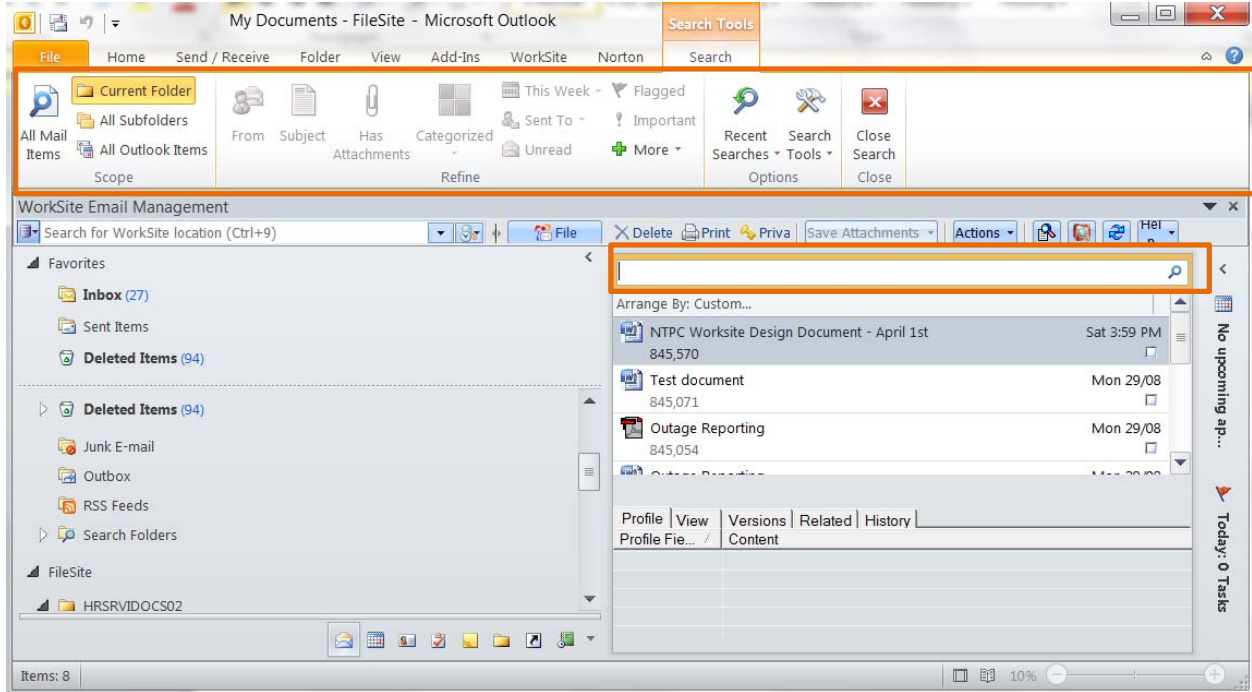


4. A saved search folder is created. Every time you click on this folder, iManage will perform the search again using the criteria specified.

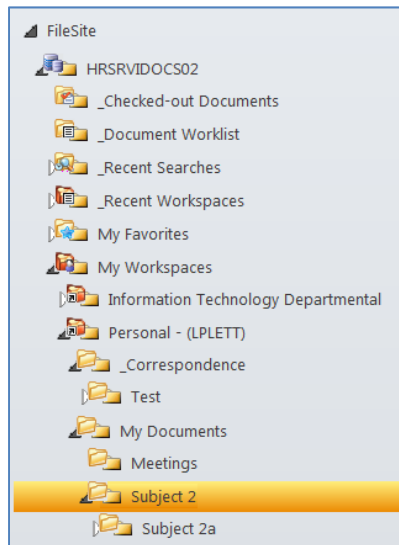


Microsoft Outlook Search

FileSite supports the use of Microsoft Outlook's native searching functions to search for iManage documents. In Outlook, click the **Instant Search** box located above the document grid to enable the **Search** menu bar.



1. Highlight a folder from the FileSite folder list.



2. In the Instant Search dialog box enter characters and press enter or click the magnifying glass to search.

The screenshot shows a search dialog box with the search term 'reporting' entered in the search bar. Below the search bar is a table with the following columns: Description, Number, Versi..., Doc Type, Author, Edit Time, and Exte... The table contains the following rows:

| Description | Number | Versi... | Doc Type | Author | Edit Time | Exte... |
|---|---------|----------|----------|--------|---------------------------|--------------------------|
| NTPC Worksite Design Document - April 1st | 845,570 | 1 | DOC | LPLETT | Sat 03/09/2011 3:59 PM | <input type="checkbox"/> |
| Test document | 845,071 | 1 | MINUTES | LPLETT | Mon 29/08/2011 10:50 ... | <input type="checkbox"/> |
| Outage Reporting | 845,054 | 1 | DOC | LPLETT | Mon 29/08/2011 10:15 ... | <input type="checkbox"/> |
| Outage Reporting | 845,050 | 1 | DOC | LPLETT | Mon 29/08/2011 9:51 AM | <input type="checkbox"/> |
| To be imported | 843,981 | 1 | DOC | LPLETT | Wed 17/08/2011 2:29 PM | <input type="checkbox"/> |
| Timesheet - LPLETT | 843,556 | 1 | DOC | LPLETT | Wed 10/08/2011 12:12 P... | <input type="checkbox"/> |
| excel1 | 809,190 | 1 | DOC | LPLETT | Fri 10/06/2011 7:19 AM | <input type="checkbox"/> |
| Test Page | 809,047 | 1 | DOC | LPLETT | Wed 08/06/2011 9:01 PM | <input type="checkbox"/> |

3. Only the documents with the characters entered in the description or within the document itself will be returned.

The screenshot shows the same search dialog box as above, but with only two results displayed, indicating that the search has been filtered to only show documents where the search term appears in the description or within the document content.

| Description | Number | Versi... | Doc Type | Author | Edit Time | Exte... |
|------------------|---------|----------|----------|--------|--------------------------|--------------------------|
| Outage Reporting | 845,054 | 1 | DOC | LPLETT | Mon 29/08/2011 10:15 ... | <input type="checkbox"/> |
| Outage Reporting | 845,050 | 1 | DOC | LPLETT | Mon 29/08/2011 9:51 AM | <input type="checkbox"/> |

4. By default it will only search in the current folder. In the Search toolbar, you can select All Subfolders.

