

Searching

Content Manager Web Client has three types of Searching:

Search Type	Functionality
Search Query	This allows users to search for records by typing in Search method(s) and clause(s).
Form Search	This enables users to search for records using predefined search methods. The <u>Form Search</u> panel is customizable by a CM Administrator.
Saved Search	This enables users to search for records using previously saved search methods and clauses. Users can save their own searches (see <u>creating a Saved Search</u>) or they can be created by other CM users who have the required permissions to create searches on behalf of other users

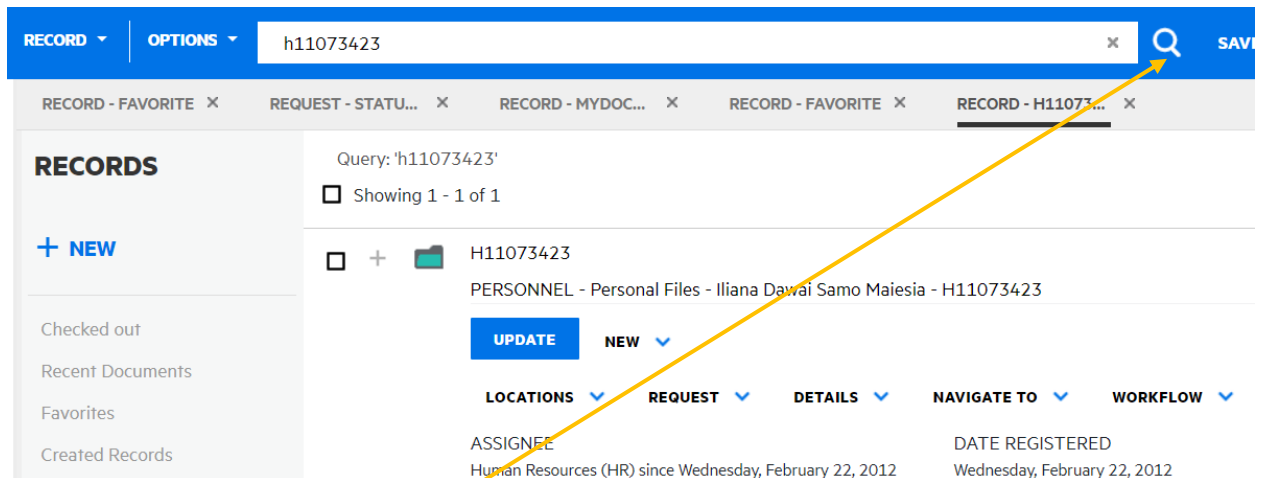
Searching for HP Records Manager Records

To perform a search with CM Web Client:

- From the global Search panel, select the Content Manager object to search for:
 - Record
 - Location
 - Activity
 - Check In Style..etc
- In the **Search query** field, type the **search method** and **clause**. For example, Title: Reef/Staff/SRC/Name of a staff member or a student or Record Number: H11073423/S11067897.

Searching

Search Query Example:



3. Click **Search** to run the search Or press Enter on the keyboard. The search results are displayed in the Search Results panel.

To display further information about the Record, edit or complete actions on an individual Record, click on the Record.

Sample Search Methods for Records

Title word - search record(s) for any word in a record title, e.g. title:
contract/Fiona/Payal/Henry*

Any word -search for record(s) combining title words and notes words, e.g. anyword:nest

Assignee - search record(s) based on the Assignee value, e.g. assignee: Ranjita Nand*

Record Number - search for record(s) using its record number e.g. number:
H11053424/2012/89

For further information and support please contact us

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Date Registered - search for record(s) using the date registered value, e.g. registeredOn: this week

Date Created - search for records using the date created value, e.g. createdOn: 06/01/2015 to 06/09/2015

FORM Searching

A Search Form is a form that displays pre-defined Search Methods. CM Search Methods can be added to the Form search. Some examples you may see are:

Form Search Types	Search By examples
Text Searches	Title, Notes, Document Content, Any Word
Date Searches	Date Created, Date Registered
Location (People & Places) Searches	Assignee, Owner, Home, Author, Addressee
Numbers Searches	Expanded Number, Container, Classification, Unique Identifier

How to use the FORM Search:

1. From the global Search panel, click **Options** and then click **Open Search Form** to open the default Search Form, or the name of your listed Favorite Search Forms.
2. Type the search clause into the Search Method field(s).
3. Click **Search**.

Searching

FORM SEARCH

TEXT ∨

Title Word

Notes Word

Document Content

Any Word

PEOPLE & PLACES <

DATES <

NUMBERS <

SEARCH **CANCEL**

Saved Searches

If there is a particular kind of search that you do frequently, then saving the search can speed up the process of doing these searches in the future. This function is particularly useful if you regularly carry out searches using relative dates, for example, all correspondence registered today, this week etc.

When you save a search, for example, records registered today, then you will have a very quick search mechanism that is usable on a daily basis.

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How to Create a Saved Search

To create a Saved Search using the CM Web Client:

- Create and run the search you want to save using the Search Query or Form Search options.
- Click **Save** and the **New saved search** dialogue is displayed.
- Complete the **New saved search** dialogue:
 - **Query** - displays the search methods and clauses (search query) for which the Saved Search is being created.
 - **Enter Search Name** - type the name of the Saved Search. It is recommended that you use a name that will be easy to find next time you want to use the search.
 - **Search Owner** - type the Location name (or Last Name for a Person) and select the name from the displayed list. This field defines who can access and run the Saved Search. By default, it is set to the currently logged in user. To create a Public Saved Search, leave this field blank.
- Click **Save**

Using a Saved Search

In the Content Manager Web Client the Saved Searches are accessible from the Navigation menu.

There are three groups of Saved Searches:

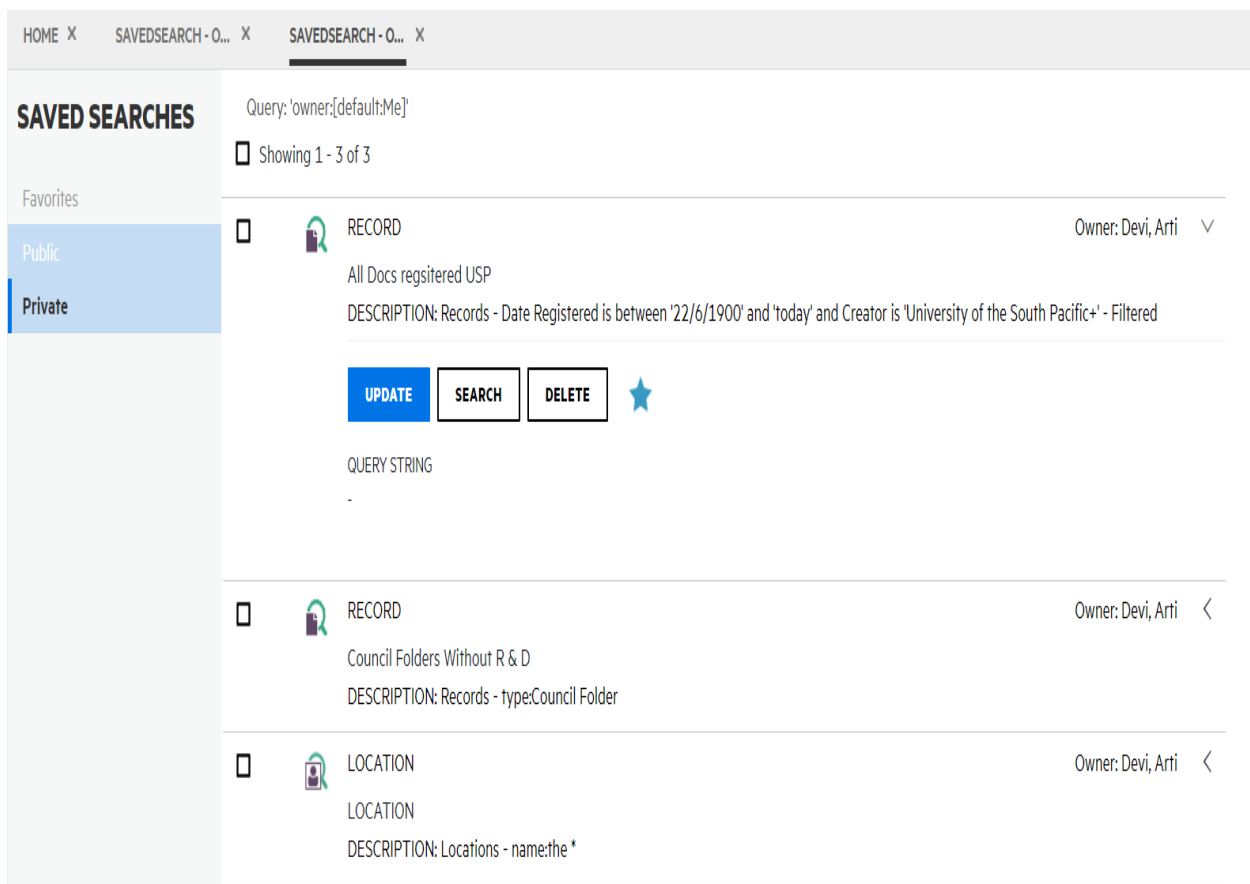
1. **Favorites** - these are the saved searches that you've added to your Favorites list.
To access the list of Favorite saved searches, on the Saved Search panel, click **Favorite**
2. **Public** - these are the searches that are available to all CM users.
*To access the list of Public saved searches, on the Saved Search box, click **Public**.*
3. **Private** - these are the searches that you as a user have created, or another user has created on your behalf, for your own personal use.
*To access your list of Private saved searches, on the Saved Searches box, click **Private**.*

Searching

Using a Saved Search

To run a Saved Search:

- On the Navigation menu, click **Saved Searches**. The **Saved Search** panel will be displayed.
- From the displayed list of **Saved Searches**, click on the type of Saved Search to access - **Favorite, Public** or **Private**.



HOME X SAVEDSEARCH - O... X SAVEDSEARCH - O... X




SAVED SEARCHES Query: 'owner:[default:Me]'

Showing 1 - 3 of 3

Favorites

Public

Private

<input type="checkbox"/>	 RECORD	Owner: Devi, Arti ▾
	All Docs registered USP DESCRIPTION: Records - Date Registered is between '22/6/1900' and 'today' and Creator is 'University of the South Pacific+' - Filtered	
	UPDATE SEARCH DELETE ★	
	QUERY STRING	
	-	
<input type="checkbox"/>	 RECORD	Owner: Devi, Arti <
	Council Folders Without R & D DESCRIPTION: Records - type:Council Folder	
<input type="checkbox"/>	 LOCATION	Owner: Devi, Arti <
	LOCATION DESCRIPTION: Locations - name:the*	

From the displayed search result list, click the **Saved Search** to be run and then click **Search** to run the Saved Search.

Saved searches can be updated or deleted by users at any point in time.

For further information and support please contact us

Searching


Editing Searches

Once a search has been run, you may find that the results list is very large or contains unexpected results so you may want to refine the search phrases to make the search more specific.

Searches can be edited from the:

- Global Search panel, or
- Search Editor

To edit a search in the global Search panel:

- Delete existing search clauses or type in new search clauses and then click **Search** 
- The refined results list will be displayed in the relevant Content Manager Object type panel.