opentext™

OpenText™ Information Archive

End User Guide

Run a search and view the results. Create and work with saved searches and background requests. This guide is for end users who want to use OpenText Information Archive to work with archived data.

EARCORE250400-UGD-EN-01

OpenText™ Information Archive
End User Guide
EARCORE250400-UGD-EN-01
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This documentation has been created for OpenText™ Information Archive CE 25.4.
It is also valid for subsequent software releases unless OpenText has made newer documentation available with the product, on an OpenText website, or by any other means.

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Chapter 1

Basic tasks

OpenText Information Archive is a powerful, secure, and scalable archiving solution. It preserves, maintains, and controls continuing access to valuable enterprise information assets.

With OpenText Information Archive, you can access applications that act as archives of data. You can run a search to retrieve the information that you need, export the search results, and more. For more information, see The Applications page and section 4 "Applications and data" in *OpenText Information Archive - Fundamentals Guide (EARCORE-ACS)*.

There are two types of applications:

- Applications that contain data extracted from decommissioned applications
- Applications that contain data from active applications

Applications can contain many different types of data, including the following:

- Microsoft Office documents
- Print streams
- Images
- Videos
- PDF files

For example, a customer record might include contact information, a picture of the customer, transactions, and a contract.

1.1 Logging into OpenText Information Archive

Once OpenText Information Archive has launched in the browser, the login page is displayed. Enter your user name and password and click **Sign in**.

1.2 Updating preferences

After logging in, all users, regardless of the user's role, can configure certain preferences. To update your preferences once you have logged into the IA Web App, click your username in the upper-right corner of the UI and select **Preferences**.

1.2.1 Configuring locale preferences

If your administrator has enabled support for different language settings, after you log into OpenText Information Archive, you can change the display language and format, including dates, times, and numbers. The available languages and formats are shown with examples in the following tables, first for dates and then for numbers:

Language	Format	Date and Time Display (Long)	Date and Time Display (Short)	Date Input Format	Time Entry Format
English	US	Dec 6, 2019 2:18:11 PM	12/6/2019	12/6/2019	12-hour clock (AM/PM)
	AU	6 Dec. 2019, 2:18:11 pm	6/12/19	6/12/2019	12-hour clock (AM/PM)
	GB	6 Dec 2019, 2:18:11 PM	06/12/2019	06/12/2019	12-hour clock (AM/PM)
German	DE	06.12.2019, 14:18:11	06.12.19	06.12.2019	24-hour clock
Spanish	ES	6 dic. 2019 14:18:11	6/12/19	6/12/2019	24-hour clock
French	FR	6 déc. 2019 à 14:18:11	06/12/2019	06/12/2019	24-hour clock
Italian	IT	6 dic 2019, 14:18:11	06/12/19	06/12/2019	24-hour clock
Japanese	JP	2019/12/06 14:18:11	2019/12/06	2019/12/06	24-hour clock
Dutch	NL	6 dec. 2019 14:18:11	06-12-19	06-12-2019	24-hour clock
Chinese	CN	2019 年 12 月 6 日 上午 2:18:11	2019/12/6	2019/12/6	12-hour clock (AM/PM)

Language	Format	Number Display	Decimal Separator
English	US	12,345.6789	Period (.)
	AU	12,345.6789	Period (.)
	GB	12,345.6789	Period (.)

Language	Format	Number Display	Decimal Separator
German	DE	12.345,6789	Comma (,)
Spanish	ES	12.345,6789	Comma (,)
French	FR	12 345,6789	Comma (,)
Italian	IT	12.345,6789	Comma (,)
Japanese	JP	12,345.6789	Period (.)
Dutch	NL	12.345,6789	Comma (,)
Chinese	CN	12,345.6789	Period (.)

The number display format contains a thousands separator and a decimal separator. For example, in English, the thousands separator is a comma and the decimal separator is a period: `12,345.6789`.

When you input a number, do not use a thousands separator. The only separator that OpenText Information Archive recognizes for input is the decimal separator. For example, in English, you must enter the following number as shown here, without a thousands separator: `12345.6789`.

Dates in search results are in your local time zone.

After you change the language and format, the settings are saved in your browser.

To change the language and format of the user interface:

1. In the top-right corner of the page, click your user name, and then select **Language Settings**.
2. In the **Language** and **Format** lists, select the language and format that you want.

Note: Applications and search forms appear in the original language that they were configured with.

1.2.2 Configuring general preferences

Initially, the default values for user preferences in the IA Web App based on your role. You can update your default values for the following:

Landing Page
Select which page you will see when you initially log into the IA Web App. The pages available depend on your user role. For example, an End User will obviously not be able to select the Compliance tab as a landing page.

Default Search Application
Select which application's search forms you will see when you select the Applications tab. This only works upon first logging in.

Default Search
If a default search application has been selected, select one of the application's search forms as a default search. This form will then be displayed when you

select the Applications tab. If a default search application has not been selected, this field cannot be set. This only takes affect upon first logging in.

Alert Message Duration
Select if an alert message is displayed for 5, 10 or 15 seconds.

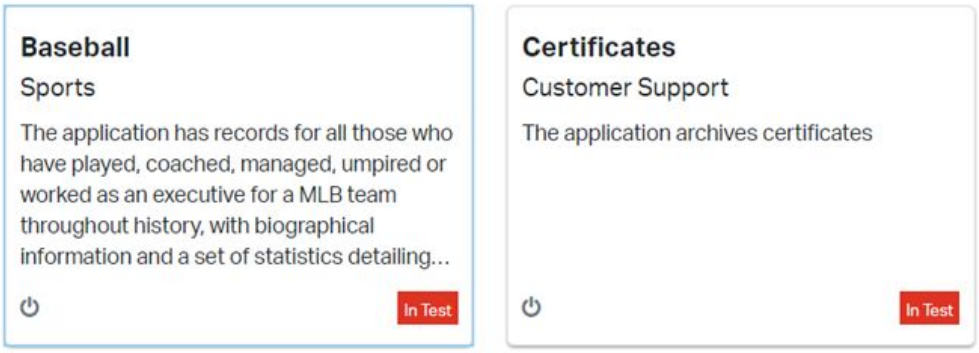
Maximum Message Count
Select the maximum number of messages to be stored in the message tray. When the limit is reached older messages are deleted automatically to make room for new messages. For more information view Messages

Enable Message Tray
Select the check box to enable the message tray feature. Clear the check box to disable the feature. For more information about the message tray, see Messages.

Once you have finished configuring your preferences, click **Save**.

1.3 User interface keyboard accessibility

OpenText Information Archive uses standard web browser keyboard shortcuts to navigate within the IA Web App. Use the **TAB** key to move to and from various screen elements. To give users an idea which active element they are on within the application, a focus border is drawn around the active screen element. In the following screen shot, the Baseball application has received focus as shown by the blue border drawn around it. In general, almost all controls including links can be activated by pressing the **ENTER** key once the control receives focus.

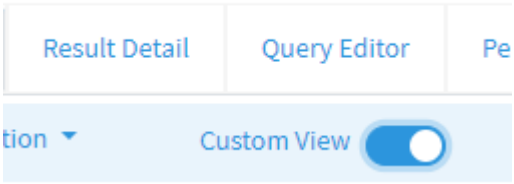


The following table summarizes controls and their corresponding short cut keys:

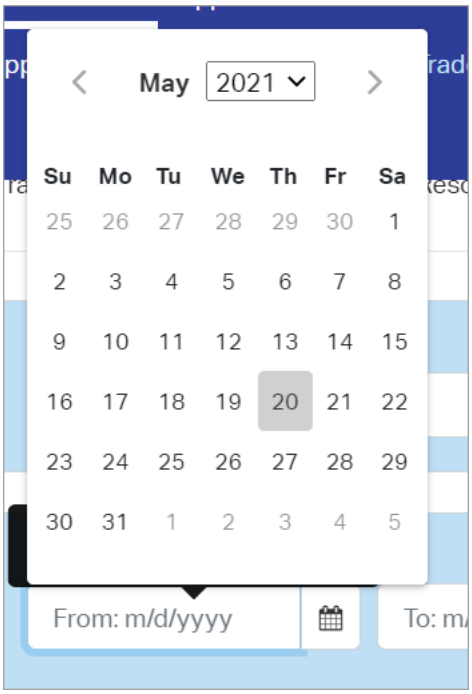
Application element	Short cut key operation
List	• Space bar or **ALT + DOWN ARROW** to open a list • Arrow keys to move up and down on the items • **ESC** key to close the list • **ENTER** key to invoke list item action

Application element	Short cut key operation
Check box, radio buttons, toggles	Space bar to toggle a state on or off
Text area	**ENTER** key to add a new line
Button	**ENTER** key or space bar to invoke the button action (functions like a mouse click)
Table rows	• **UP** and **DOWN ARROWS** to put focus on a table row • **ENTER** key to select the active row • With check boxes, space bar to select/deselect • **ESC** key to cancel and close a dialog box • **ENTER** key to submit a dialog box's default action (for example, Update)

Toggle buttons behave like a check box that uses the space bar to toggle a state on or off:



Date pickers allow you to enter or select a date in a drop-down calendar. Click on a date to select it or use the left and right arrow keys to move through the dates and select them.



If a field has been disabled, press **TAB** to skip to next field.

1.4 The Applications page

After logging in, the **Applications** page is displayed showing all the applications that you are permitted to access. Simply click the application to select it and access the available search forms.

Applications can be viewed in two different ways. Toggle between the two views by clicking one of the following buttons:

	The card view is the default view and allows you to view the available applications in a series of cards. The card view shows more information about an application than the list view.
	The list view allows you to view a list of available applications in a vertical grid.

Both views contain the following application information:

- The name of the application.
- A description of the contents of the application's archive.
- The application's category (for example, **First time Setup**).
- The **Primary Language** setting is used to specify the language used for the unstructured content extraction. English is used, by default.

- **Additional Language** is an optional setting used to specify a additional languages to improve the search results for unstructured content that contains multiple languages.

  Note: Enabling this setting has an impact on the library size and search performance.

- The application's **Status**: **In Test** or **Active**.

Each OpenText Information Archive application, in both the card and list view, also displays one of the following icons:

	Indicates that the application contains data extracted from a decommissioned legacy application. For more information, see section 1 "What is OpenText Information Archive?" in *OpenText Information Archive - Fundamentals Guide (EARCORE-ACS)*.
	Indicates that the application contains data extracted from an active application. For more information, see section 2.3.2 "Data record archiving" in *OpenText Information Archive - Fundamentals Guide (EARCORE-ACS)*.

1.4.1 Finding an application

If dozens of applications have been created, you may have to navigate to a specific page of applications to find the one that you are looking for. Use the **Find an Application** field to quickly locate a specific application.

The **Find an Application** field allows you to locate an application by either:

- Entering the name or partial name of the desired application; or
- Entering keywords that may appear in the application's description.

Once your search criteria has been entered, press **ENTER** on your keyboard. Applications are displayed based on the specified search criteria.

To clear the field and return to the **Applications** page, click the **X** that appears on the right side of the **Find an Application** field.

The **Applications** page also contains filters you can use to find an application, located to the right of the **Find an Application** field:

- **Application Type**: An application can be one of two archive types:
  - **Application Decommissioning**
  - **Active Archiving**

  Select **All** to view applications of both types.
- **Category**: When an application is created, a category is applied to it. Select one of the predetermined categories for the applications (for example, **Example Application** and **First-time Setup**).

- **Status**: When an application is created, it has a status of **In Test**, which allows it to be tested, typically with fake data. Once this testing is completed, the application becomes **Active**.

  Select **All** to view both **In Test** and **Active** applications.

- **Online only**: Applications can be taken offline to save on storage costs. If this check box is selected, you can see only applications that are online. Clear the check box if you want to view applications that have been taken offline.

1.5 Configuring items on a listing page

There are several types of listing pages that users can access, for example, a set of search results by the End User or all the retention policies by the Retention Manager. In a listing page, you can set the number of items (row) displayed per page, such as 10, 20, 30, 40 or 50.

Once you have set the number of items per page, the setting will apply to all listing pages, even if you log out of OpenText Information Archive.

1.6 Modifying column sizes

It is possible to expand columns to see more of the text. When a column contains too much text to fit in the column, ellipses (**...**) are displayed.

To modify column size, mouse over the header of the list and wait for the cursor to change. Then click the  icon and drag your mouse left or right.

1.7 Messages

When messages are generated by the system, they are logged in the message tray for you to review.

	Use the envelope icon in the bottom right corner of the screen to access messages.
	A red dot appears on the envelope icon when there are new messages.

Hover over the envelope icon to get a summary of the message types. Messages are divided into four different types, that are displayed using four different icons:

	Error
	Warning
	Information

	Success

Click the envelope icon to open the message tray. The message tray contains a list of all the available messages. Each message is displayed in a table that contains the following information:

Timestamp
The date and time that the message was created.

Severity
An icon that shows the type of message.

Message
The contents of the system generated message.

HTTP
Standard HTTP error code. This column is only populated it an HTTP error code is reported with the message.

Details
A more detailed description of the system generated message.

Enable HTTP
Select the box to be able to access more error messages and warnings related to client server communication. By default, this feature is disabled. Click the  icon to view additional information. To disable the feature, clear the box.

A filter showing the four different severity types. By default, all four types are selected. Click on a severity type to deselect it and remove all instances of that message type from the list.

Clear All
Click  to delete the message in that row. Click **Clear All** to delete all messages in the message tray.

 **Note:** Only user action messages are shown in the message tray, other types of messages (such as browser console errors) are not logged.

Message history is kept between sessions in the same browser. If you use a different browser then message history from the previous session will not be shown.

By default, the message tray can store up to 25 messages. You can adjust the maximum message count in the **General Preferences** section. Furthermore, you can also opt to disable the message tray. See Configuring general preferences for more information. When the maximum number of messages is reached the oldest are deleted automatically to make room for new messages.

1.8 User context

OpenText Information Archive remembers any filter values that you specify. For example, if you set the **Application Type** filter to **Active Archiving** and then log out, the system remembers the setting and applies it when you log back in.

After logging back in, you can reset filter settings to the default settings by clicking the icon located on the far right of the filter fields.

Chapter 2

Searching for archived data

Each OpenText Information Archive application contains a set of searches that allows you to retrieve the desired data. Access an application to run a search to retrieve the desired information and export the search results.

Search forms are created by a Search Developer and provide a rich graphical interface for both entering search criteria and viewing search results. Depending on the data stored in the archive, a search form may include fields such as text fields, lists, date pickers, and radio buttons.

The available search forms for an application are listed on the application's **Search Forms** tab. To access a search form, click its name in the list.

Each search can contain one or more search sets, which are listed alphabetically. The sets that are available to you depend on how the Search Developer has configured the search form.

It is possible that, even if you can see a search, it is not available to you depending on your permissions.

2.1 Understanding search types

There are four types of searches in OpenText Information Archive: *primary searches*, *cross-application searches*, and *nested searches* or *linked searches*. Linked searches can be between two different applications (for example, a search in the Baseball application can link to a search in the PhoneCalls application).

Primary searches run against the data stored in a single application and appear in the application's **Search Forms** list. Primary searches are identified in the list with the  icon. For help on viewing primary search results, refer to Viewing search results.

Cross-application searches run against the data in one or more other applications. They are created by linking the cross-application search to searches of the other applications. These applications are referred to as *delegate applications* while the searches are referred to as *delegate searches*. Cross-application searches are identified in the search forms list with the  icon. They also appear in each delegate application's search list as sub-searches of the linked delegate search, as shown in the image below. In this case, **Name Cross-Application Search** is the cross-application search while **DropdownlistFirstName** is the linked delegate search. For help on viewing cross-application search results, refer to Viewing cross-application search results.

Nested searches are embedded in primary searches to narrow search results on a particular field. Because nested searches are embedded, they do not appear in the application's search list. For help on viewing nested search results, refer to Viewing results from a nested search.

2.2 Finding a specific search form

If dozens of searches have been created, you may have to navigate to a specific page of searches to find the one that you are looking for. Use the **Find a Search** field to quickly locate a specific search form.

The field allows you to locate a search form by entering:

- The application's name or partial name
- Keywords that may appear in the search form's description

For accessibility, after entering search criteria, press **ENTER** to display matching search forms. To clear the **Find a Search** field, click the **X** that appears on the right side of the field.

In addition to the **Find a Search** field, you can use the **Category** and **Type** filters to further narrow your search criteria. For example, you can use the **Type** filter to narrow results to only primary searches or only cross-application searches.

2.3 Entering information in a search form

The fields available in a search form depend on which elements the Search Developer included in the form when it was created.

Certain fields require you to enter search criteria, such as text fields, while other fields require you to select search criteria using lists or check boxes.

The Search Developer has a variety of tools that can be defined in a search form to let you enter search criteria for efficient searches.

For example, the Search Developer may include information or hints (tooltips) for a field to help you enter criteria correctly, such as date formats for **From** and **To** fields.

The Search Developer may also impose restrictions on a field. For example, a specified date range can only span one year. You will not be able to run the search if the date range exceeds one year. If the search criteria you enter fails to comply with a restriction imposed by the Search Developer, an error message is displayed to alert you.

The following subsections provide instructions and tips when entering information in specific fields.

2.3.1 Entering dates in a search field

End users may be prompted to enter a date or a date range to retrieve the relevant records. You can always enter a date manually, especially if the Search Developer has included instructions or tooltip text outlining the format in which you are to enter a date.

You can also click the field to select a date:

A calendar is displayed. You cycle back and forward by month or select a year from the list.

<	Click to cycle back a month. In the desired month, click the date you want to enter as search criteria. To cycle back by year, click the month and year (for example, **January 2000** in the screen shot above) and then press this button to cycle backwards. In the desired year, click a month and then the date you want to enter as search criteria.
>	Click to cycle forward a month. In the desired month, click the date you want to enter as search criteria. To cycle forward by year, click the month and year (for example, **January 2000** in the screen shot above) and then press this button to cycle forwards. In the desired year, click a month and then the date you want to enter as search criteria.

2.3.2 Entering times in a search field

You will sometimes be prompted to enter a time or a time range to retrieve data. You can always enter a time manually, especially if the Search Developer has included instructions or tooltip text outlining the format in which you are to enter a time.

You can also click the up or down arrows to enter a time.

▲	Click to scroll the time up by the hour, minute, or second. Select the desired number.
▼	Click to scroll the time down by the hour, minute, or second. Select the desired number.

Select whether you want **AM** or **PM**.

Note: The Search Developer controls whether dates are localized based on your time zone or not. It is recommended to indicate this information on the form through tooltips to avoid ambiguity.

2.3.3 Using multiple values in a search field

The Search Developer can also configure a search form field to allow you to apply search criteria to multiple fields. For example, a text field might allow you to enter the name John to search as a first, middle, or last name. This can be done by selecting the **Allow Multiple Values** check box.

2.3.4 Using operators in a search field

The Search Developer can also configure a search form field to allow you to apply an operator to the search criteria.

An operator is a parameter that you can apply to a search field to narrow the scope of your search. There are three main types of operators you can apply to a field:

Number Operators

- Equals To
- Not Equal To
- Greater Than or Equal To
- Greater Than
- Less Than or Equal To
- Less Than

String Operators

- Exact Match
- Does Not Match
- Begins with (case sensitive)
- Begins with *
- Ends with *
- Contains *
- Fulltext expression *

(*) Only if the full-text index is enabled for the string field.

Date Operators

- On
- Not On
- On or After
- After

- On or Before
- Before

To use an operator, select it from the list and then enter the search criteria.

For encrypted fields, only the Exact Match or Does not Match options are allowed.

For searches on unstructured content, no operator can be used. Only full-text expressions are supported.

2.4 Running a search

2.4.1 Filling a search form

To run a search, complete as many of the available fields as required and click **Search**.

When the search results are available depends on whether the search is run in the foreground or background.

When a search runs in the foreground, it is referred to as a *synchronous* search, and search results immediately appear in the **Search Forms** tab.

If a search takes longer than eight seconds to return results, the system prompts you to either continue the search in the background or cancel the search. If you continue the search in the background, a dialog box prompts you for a name for the search.

Note: Eight seconds is the default time limit, but your company's Administrator may have changed the time limit to be longer or shorter.

The results of a background search are viewed in the **Background Requests** page. For more information, refer to Working with background requests

Note: If a search fails for any reason, it will show with a **Status Failed** on the **Background Requests** tab. To go back to the original search form with previously entered values in order to re-run the search, click the **Re-run** button next to the **Status**.

2.4.2 Running a search in the background

After completing the required fields in a search form, you can opt to run the search in the background, referred to as an *asynchronous* search. For more information, see Working with background requests.

To run a search in the background:

1. Click the arrow on the right of the **Search** button and click **Run search in background**.

   A **Search in Background** dialog box appears populated with a default search name.

2. If desired, change the search name in the **Search in Background** field.

3. Click **Search in Background**.

The results of a background search appear in the **Background Requests** page once the search has completed. For more information, refer to Working with background requests.

2.5 Viewing search results

There are three different types of search results:

- The first type, and the most used, is the tabular format for viewing results.
- The second type is the custom presentation of results, whereby the search designer specially designed a page of results that appears different than most of the sample searches.
- The third type is the timeline view, whereby the search user can narrow search results using a date filter. Refer to Viewing search results in a timeline for more information.

If a search runs synchronously, the results are presented in a table of rows and columns as configured by the Search Developer. The results may contain text, links to nested searches, and downloadable or viewable content.

The Search Developer may have placed a quota on the number of results returned in a particular search. If so, a message on the right-side of the result screen indicates **Partial Result**. Click the information icon for further information.

Depending on the number of records, results may appear on more than one page, as shown below. To navigate to a specific page, enter the page number in the field and click **ENTER**. To browse through results pages, use the navigation controls as described in the table below.

	Return to the first page of search results

	Navigate backwards one page
	Navigate forwards one page
	Navigate to the last page of search results
Rows per page	Results are displayed 20 rows per page as the default. Use the **Rows per page** list at the bottom right of the results table to select a different number (10, 30, 40, or 50).

There may be occasions when the data in the columns of the search results cannot be seen in its entirety. These columns are identified by an ellipsis (**...**) to the right of the column name.

If enabled by the search designer, the  button appears in the header of individual columns in a set of search results. This allows you to sort a specific column of results in ascending or descending order.

To view a column's data in its entirety, click inside a cell to display a popup window containing all the data.

If desired, the data shown in the popup can be copied to the clipboard or another application.

If enabled by the search designer, a series of buttons allows you to perform the following actions against the search results:

	Sort an entire set of search results. For more information, see Sorting search results.
	Configure which columns are displayed and which are hidden. For more information, see Hiding and showing columns in search results.
	Use an advanced filter to narrow down the search results. For more information, see Using an advanced filter to narrow search results.
	Group the search results according to a specified column. For more information, see Using the Group By feature.

A blue dot above appearing above any of these icons indicates that you previously enabled the feature. For example, if you previously hid a column in a set of search results, the Show Columns icon appears like this:  .

On the right side of the screen, below the secondary header, the system displays the amount of time it took to locate the search results. Again, if enabled by the search designer, the following icons might appear to the right of this time display:

	View information about the selected row of search results. The information displayed depends on how the results were configured by the search designer.
	View compliance-related information about the selected row of search results. The information displayed depends on how the results were configured by the search designer.
	Apply quick filters to the search results. For more information, see Using a quick filter to narrow search results.

2.5.1 Sorting search results

The sort feature allows you to organize a set of search results.

1. Click the Sort button on the right-side of the screen. The Sort form is displayed.
2. Select a column from the **First by** list.
3. Use the and buttons to toggle between an ascending or descending sort.

   To delete the sorting criteria you entered, you can either click X beside the sort criteria you entered or **Reset to default**.
4. To apply additional sorting criteria, click ; otherwise, proceed to the next step. Select a secondary column from the **Then by** list.

   Repeat this step to apply additional sorting criteria; otherwise, proceed to the next step.
5. Click **Apply**.

Once you have used this feature to sort a set of search results, the button appears with a blue dot: . If you revert to the default sort for the results, the button appears in its original state without the blue dot.

2.5.1.1 Sorting individual columns of search results

A search designer can also enable the ability to sort individual columns in a set of search results. , and then

To sort an individual column:

1. Click in the header of the column being sorted.
2. Click or to toggle between an ascending or descending sort.

To sort an individual column using your keyboard:

1. Press the **TAB** key until you reach the desired column.

2. Press **ENTER** to sort the column content in ascending order. Pressing ENTER more than once toggles between ascending and descending order.

2.5.2 Hiding and showing columns in search results

There may be instances where a set of search results contains so many columns that you have difficulty navigating and viewing the results. OpenText Information Archive allows you to configure which columns are displayed and which are hidden.

Any changes you make to the columns persist until you undo the changes, even if you log out and log back in. Also, any changes impact only you and not other users.

To hide a column of search results:

1. Click the Show Columns  button on the right-side of the screen.
2. In the Column form, deselect the checkbox for the column you want to hide. Conversely, to show a hidden column, select the checkbox.

   To display all columns, click **Show All**.

Once you have used this feature to hide a column of search results, the button appears with a blue dot:  . If you revert to the default display for the results, the button appears in its original state without the blue dot.

2.5.3 Using an advanced filter to narrow search results

When a search designer adds filters to a search, it helps the user narrow down the search results. Use the advanced filtering feature to control which results are displayed. As long as a result column is configured to use filters or if a Retention Manger enriched the results with compliance information, you can apply single or group filters to the results using `AND`/`OR` operators.

A filter expression comprises of three parts: field, operator, and value:

Field
A field is simply a filterable column name.

Operator
Operators are chosen based on the data type of the field. Some exceptions are:

- For encrypted fields or Boolean, which is a result that has one of two possible values (true or false), the only possible operations are `EQUAL` and `NOT Equal (!=)`.
- For fields that comprise a list of names (like `holdNames`), operators are `in` and `not in`.

Value
The value part also depends on the data type:

- For a Boolean value, a checkbox is displayed and selecting the checkbox indicates the value is `true`.
- For a list, a proper selector is displayed so that multiple items in the list can be selected.
- For Date and Datetime data types, date selectors are displayed.

To use advanced filters on a set of search results:

1. Click the button.
2. Select the operator you want to filter the results with, `AND` or `OR`.
3. Select one of the following:
   - **+ Add filter**: This option allows you to add multiple filters using either an `AND` or `OR` operator. Once a filter is applied, click X or **Clear All** to remove it.
   - **+ Add filter group**: This option allows you to add multiple filters along with multiple `AND` or `OR` operators. Once a filter group is applied, click **Delete filter group** or **Clear All** to remove it.

   a. Select the column to apply filters to.

   The Preview pane allows you to see the SpEL expression of the filters being added.

   b. Select the desired operators to further configure the search results.
4. Optional Add as many filters or filter group, as desired.
5. Click **OK**.

Once you have used this feature to apply an advanced filter to a set of search results, the button appears with a blue dot: . If you remove the filter, the button appears in its original state without the blue dot.

You can also apply quick filters to a set of search results.

2.5.4 Using the Group By feature

If configured by the search designer, use the Group By feature to organize a set of search results by a specific column. For example, you run a search for invoices but the results contain many pages of results. You can use the Group By feature to group the results according to customer names or numbers.

To use the Group By feature on a set of search results:

1. Click the Group By button.
2. Select a column from the **Select Option** list.

- Optional Click ▲ or ▼ to toggle between grouping the results in ascending or descending order. If First Record is selected in the next step, the ascending and descending buttons are not displayed.

3. For **Display Mode**, select either **List** or **First Record**. The difference is that the List mode contains an extra level that includes the name of the group and number of items.

   For the List mode, click » to list all the records that are part of the group.

   For the First Record mode, click » to list all the records that are part of the group if more than one item is available.

4. Click **OK**.

Once you have used this feature to group a set of search results, the button appears with a blue dot: . If you revert to the default sort for the results, the button appears in its original state without the blue dot.

2.5.5 Using a quick filter to narrow search results

The use of advanced filters was previously discussed in this section. The search designer can also allow you to apply quick filters on a single or multiple columns in the results of a search.

To apply a quick filter on a set of search results:

1. Click the Filter button on the right side of the screen. If a set of search results is not configured to use quick filters, the Filter button on the right side of the screen is disabled.

   The **Quick Filters** pane appears on the right side of the screen.

2. For the column being filtered, click the = ▼ button and select an operator to apply to the filter. These operators are available based on the data type associated with that column. For encrypted columns, only two operators are available (**Equal To** and **Not Equal To**).

   The filter operators that are displayed depend on the type of data that appears in the column. For example, when filtering a **Customer IDs** column, where the data type is a number, the following operators are available:

   - Equals To
   - Less Than
   - Less Than or Equal To
   - Greater Than
   - Greater Than or Equal To
   - Between

- Not Equal To

For instance, when filtering a column that contains first names, where the data type is string, the following operators are available:

- Exact Match
- Begins with (case sensitive)
- Begins with
- Ends with
- Contains
- Not Equal To

Notice how you can run case-sensitive or insensitive exact matches. Some operators, such as **Begins with**, **Contains**, and **Ends with** are not case-sensitive.

When filtering a column that contains date-related data, the following operators are available:

- On
- Before
- On or Before
- After
- On or After
- Between: Enter both start and end dates. If only one date is specified, the filter may not work as expected.
- Not On

3. In the field provided, enter or input the filter criteria for the column being filtered.

   For example, let us say you want to apply a quick filter to a column of search results that contains the last names of different customers. You are looking for the customer Paul Abbott. You can select the operator for **Exact Match** and type in `Abbot` or select the operator for **Begins with** and type A.

   If the column contains date-related data, select the desired filter operator and click anywhere on the input field to launch the date picker.

   Tip: You can look for multiple values in one column, as well. For example, if you are not sure of a customer's first name and the **First Name** filter is enabled in the search results column, enter a semicolon-separated list of first names. For example, entering `Dan; Don; James` will display all entries whose first name equals Dan, Don or James.

   To remove a quick filter, click X beside the filter or **Clear All**.

4. Optional Repeat steps 2 and 3 to apply a quick filter to a different column to further narrow the results.

2.5.6 Viewing cross-application search results

A single search can also search the archives of multiple applications. For example, a customer may have a checking account that includes a name, phone number, address, and account statements. The same customer may also have an investment account that includes a name. While the data for these two different accounts is stored in separate applications, a Search Developer can set up a single search that searches the archives of both applications. This is called a *cross-application search*.

A cross-application search can search the archives of multiple SIP and table applications. The searches included in a cross-application search are referred to as *delegate searches*.

A cross-application search may take time to complete its run, depending on the number of delegate searches associated with the primary search. You can choose to run a cross-application search as a background request.

By default, cross-application search results appear in a tile view as shown below, with each tile corresponding to a delegate application and search. The tile view is intended to provide a summary of search results; therefore each tile displays only the first three columns and first five rows of the results.

To view a cross-application's complete search results, you can switch to a tab view by clicking a tile's header or the **Show All** link on the bottom-left corner of the tile. Results from the delegate applications and searches appear in different tabs. To view a tab's results, simply click the tab's name across the top of the search results table.

When in the tab view, you can also click a tab's information icon to view information about the search, including:

- The name of the selected delegate search
- The search set that was used from the delegate search
- The application that contains the delegate search
- The number of results contained in the selected delegate search

Finally, to go back to the tile view from the tab view, click the **Search Results Dashboard** icon located in the upper-right corner of the search results.

2.5.7 Viewing in-line panes

Depending on how the Search Developer configured a particular set of search results, further details may be displayed in an in-line pane.

To view the in-line information for a record in the search results, click the following button: 

To view all the content in an in-line pane, use the scroll bar.

2.5.8 Viewing side panes

Depending how the Search Developer configured a particular set of search results, further details may be contained in a pane to the side of the search results.

Note how the side pane contains two tabs, each of which contains different search results fields. Click the tab to view its contents.

2.5.9 Viewing content relating to a record

Depending on how the Search Developer configured the search, the search results may be able to be exported from the archive.

Different export configurations can control which format to use (for example, GZIP, ZIP, or TAR) and whether the support files are also exported (such as documents, MP3s, or images).

To download information from a set of search results, click the **Download** link, as seen in the **Invoice** column.

In some cases, a search may provide direct access to some of the unstructured content. For example, the Download link shown above provides the ability to view the content via the Brava viewer.

It may also be possible to export the search results (refer to Exporting search results for more information).

2.5.10 Previewing search results

Depending on how the Search Developer configured a particular set of search results, further information can be accessed by clicking a **View** link in the results table.

You may also be able to view and download files in the following formats:

- PDF
- TIFF
- PNG

- JPEG
- GIF

Click the **View** link to display a preview of the information (in this case, a PDF file).

When enlarged, you can scroll through the information and rotate the item. Other actions may be permitted, such as printing or downloading the item. Again, the actions available depend on how the Search Developer configured the search results.

The Search Developer may have configured the search results to allow even further options, such as the ability to search the item, jump to a specific page in the item, and rotate and change the viewing settings for the item:

To close the item, click off the item or press **ESC**.

2.5.11 Viewing results from a nested search

A search can be designed to include results from a different application as a *nested search*. When you run the initial search, the results are displayed. Within those results, there will be links that will act as a secondary search to data stored in a different application:

Sent to	Call start	Call end	Call from	Call to	Custome...	Last name	First name	Represe...	Attachm...
12/01/2005	11/24/2005...	11/24/2005...	1100619244	142709461	719	Hussain	Evelyn	25	Download
12/01/2005	11/14/2005...	11/14/2005...	1509044766	1103763075	530	Anderson	Lucy	7	Download
12/01/2005	11/30/2005...	11/30/2005...	1112772182	1061963805	702	Thomas	Alexander	15	Download
02/01/2010	01/22/2010...	01/22/2010...	1259560192	1710542790	502	Parker	Cameron	33	Download
02/01/2010	01/23/2010...	01/23/2010...	251349291	1716726739	607	Morgan	Khloe	35	Download
02/01/2010	01/13/2010...	01/13/2010...	1072584596	1114860461	147	Parker	Maria	1	Download
02/01/2010	01/24/2010...	01/24/2010...	1617113674	617498775	103	Hunt	Adrian	34	Download
02/01/2010	01/17/2010...	01/17/2010...	2136227854	1008136841	321	Evans	Owen	16	Download
02/01/2010	01/09/2010...	01/09/2010...	776002718	1716726739	457	Wright	Josiah	35	Download
02/01/2010	12/31/2009...	12/31/2009...	1234790697	1255846933	391	Thompson	Avery	20	Download

To run the secondary search, click the desired link. The secondary search can even run in the background. Click the down arrow for the desired link and select **Run search in background**.

In the popup, enter a **Request Name**, if desired, and click **Start background search**. The results of the secondary search will be displayed in the **Background Requests** tab.

Tip: Use the breadcrumbs to navigate among the initial search results, the secondary search results, and back to the original search form:

2.5.12 Viewing search results in a timeline

Using the Timeline View feature, the Developer can configure a search result set so that users performing date-based searches can view results in a timeline and select an element in the timeline to filter the results to display. For example, a timeline view configured for an invoices number search allows the user to view invoice activity in a timeline. The user can then select an element in the timeline to view invoice activity for a particular year, month, day, and even time. In addition, by restricting search results to a particular customer, the user can view details of that customer's last invoice activity.

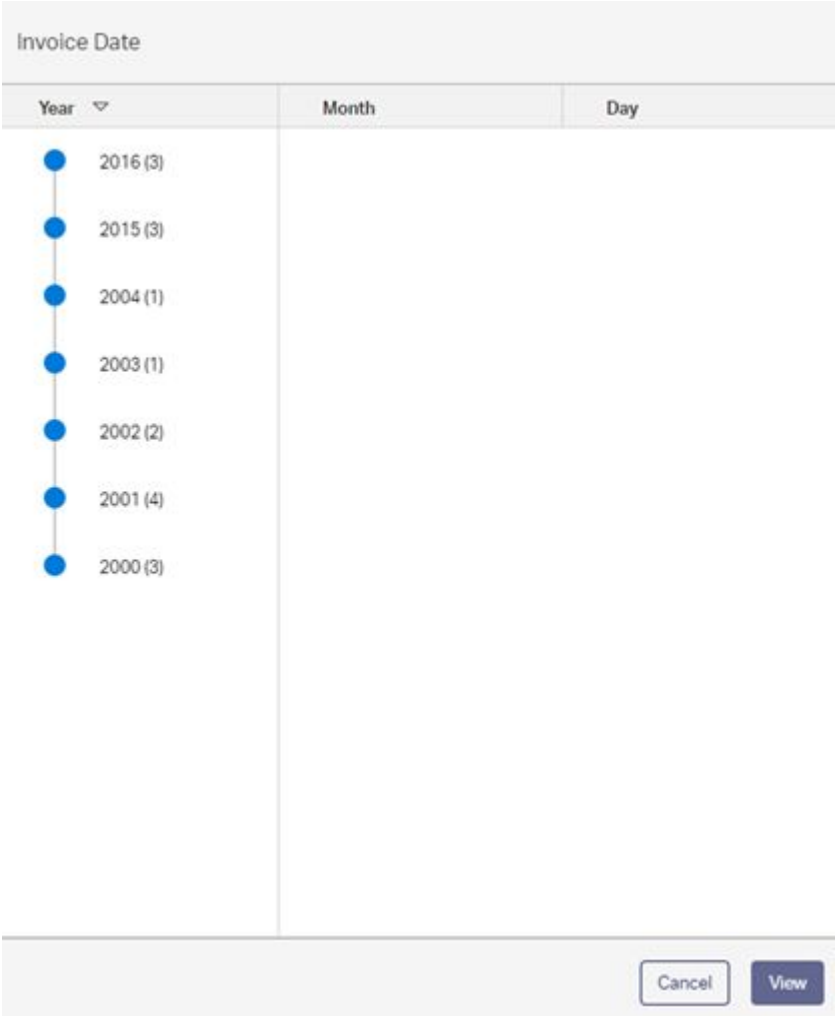
The feature allows for more efficient searching by providing more granular access to data, especially in the case of large data sets.

To view the timeline view configured for an invoices number search:

1. In the Invoices application run the **Invoice Date** search, entering today as the last date in the **Invoice Date** range.

   You should now see the timeline with columns for **Year**, **Month**, and **Day** showing results for **Year**. The number in brackets next to a year represents the results count for that year.

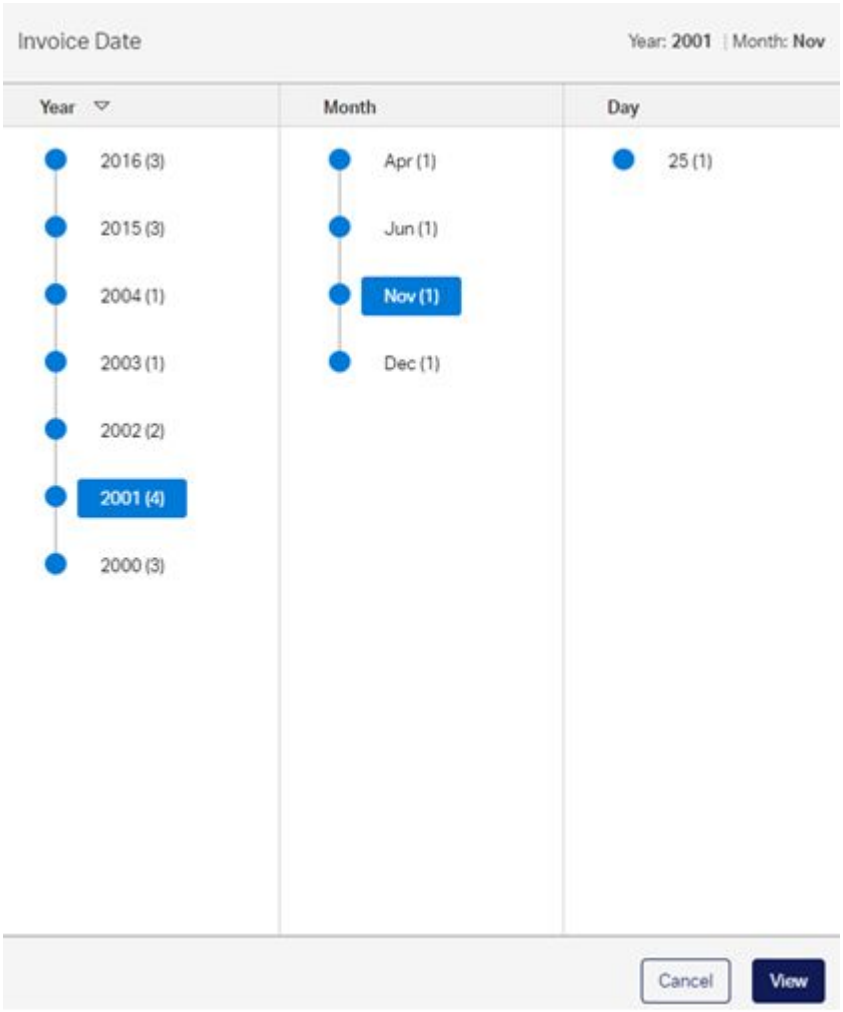
   Note: The **Year** column is in reverse-chronological order by default (last year first). To reverse the order, click the down arrow next to the column label.



Note: In this example, the timeline is based on a DATE field type, so it consists of **Years**, **Months**, and **Days**. In a Phone Calls application search, for example, where phone call date and time data is stored, the timeline can be based on the phone call date and time (DATETIME field type) such that the timeline will consist of **Hours**, **Minutes**, and **Seconds** in addition to **Years**, **Months**, and **Days**.

2. To show results of invoice activity for November 2001, for example, click **2001(4)** in the **Year** column and **November(1)** in the **Month** column.

   You should now see results in all three columns of the timeline. Again, the numbers in brackets indicate the results count.

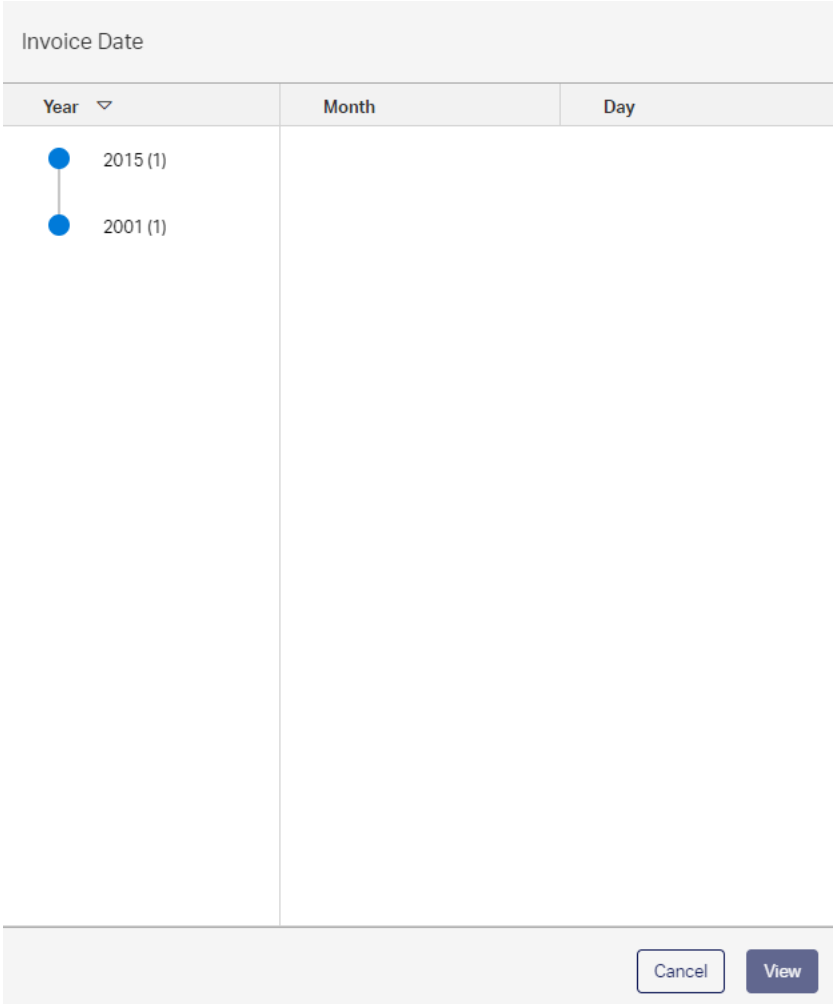


3. To display results in the results table, make sure **Nov(1)** is selected in the **Month** column, then click **View** at the bottom-right of the timeline.

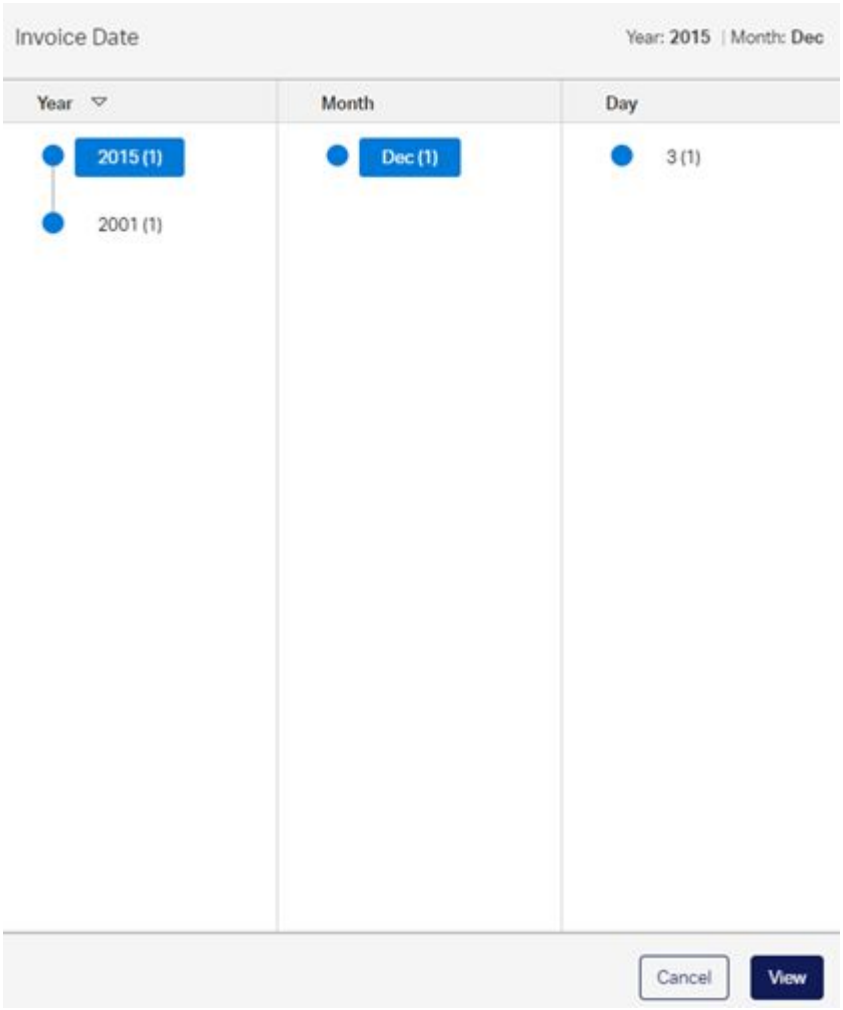
   The results appear in the results table with breadcrumbs above displaying the selected **Year** and **Month**.

4. To view details of a particular customer's invoice activity, re-run the **Invoice Date** search entering the customer's name (e.g., **Novell**).

   You should now see a timeline view of the customer's invoice activity broken out by **Year**.



5. To view details of the customer's last invoice, select the last **Year**, **Month**, and **Day** in the timeline.



6. To view results in the results table, click **View**.

Note: You can apply column-based filtering to Timeline View search results. However, you cannot filter on the field/column that the Timeline View is based on (in this case, **Invoice Date**) even though it is a filterable field.

2.6 Working with Content Aviator

Prerequisites

You need the following to use OpenText™ Content Aviator (referred to as Aviator for the remainder of the section):

1. The Administrator must enable the feature.
2. You must accept the welcome message when you open the Aviator chat panel.

Aviator is an intelligent assistant powered by AI that allows users to ask natural language questions about or summarize search results and saved search results in OpenText Information Archive.

You can ask questions about all search results or just a single record. Content Aviator responses are only based on the content that you have permission to access. If you ask your question in a supported language, Content Aviator will attempt to respond using the same language.

Content Aviator can also produce visual transformations of search results and render the information in the form of, for example, bar charts, pie charts, or line charts. These visualizations of search results, rendered by Vega-Lite, can help perform data analysis and presentation.

To use Aviator while viewing a set of search results:

1. Click the **Aviator** button

in one of the following circumstances:

- To use Aviator for all results, click the **Aviator** button in the main banner beside the **Save Search** button.
  - Advanced filters can be used in conjunction with Aviator. Apply the desired filter(s). The search results are displayed according to the filters you configured. Click the **Aviator** button in the main banner. Instead of providing information about all the search results, Aviator provides further information only for the filtered results. To learn how to use advanced filters, see Using an advanced filter to narrow search results.
- To use Aviator for a single record, click the **Aviator** button for the record.

2. When you open the chat panel for the first time, a welcome message appears. Read the message thoroughly, and then click **Accept** to start working with Aviator. Click **Do not display this message again** to stop the message from appearing in the future.

3. Optional This step is only if you want to ask Aviator about all search results. To have a meaningful conversation with Aviator, OpenText Information Archive must perform indexing on the search results as a background request. Click **Enrich for Aviator** to begin the process. Close the Aviator panel and click the **Aviator** button again in a few seconds.

4. Do one of the following:

   - Type a question in the available field and click the send icon (paper airplane).
   - Click **Summarize context** to review further context, either for the entire set of search results or for the selected record, depending on where you clicked the Aviator button.

5. After receiving the first answer, you have additional options:

   - If available, click **References** to review the documents that Aviator consulted to obtain the results. If available, access the menu to perform the following actions:
     - If available, download a reference document.
     - If available, view the document that Aviator consulted to obtain the results.
   - Copy the answer to the clipboard by clicking the **Copy to clipboard** button  .
   - To delete the user prompt and Aviator answer, click  .
   - Get further information by clicking **Tell me more**, which provides more information about the results, or by asking another question.

- Dismiss the current chat and start a new topic by clicking the **New discussion** button  .

2.7 Creating and working with saved searches and matters

When running a search, you have the option to store the search criteria and results as a *saved search*. As opposed to ad hoc searches, saved searches allow users to view search results for longer periods of time.

Once saved searches are created, they can be grouped into what is called a *matter*. A matter is a named collection of saved searches. Saved searches can be added to and removed from a matter.

Once saved searches and matters are created, they can be shared with groups with either Viewer or Editor access.

2.7.1 The Saved Searches tab

The **Saved Searches** tab contains two sub-tabs: **Saved Searches** and **Matters**.

2.7.1.1 The Saved Searches sub-tab

The **Saved Searches** sub-tab lists the saved searches owned by and shared with the current user.

Each saved search is displayed in a table with the following information:

Name
Name assigned to the search when it's created.

Context menu with selections to perform the following actions to saved searches:

- Edit
- Delete
- Export All
- Share
- Rerun
- Show Background Requests: Allows you to view requests made against the saved search from the **Background Requests** tab, including automatic/ scheduled reruns.

  When Show Background Requests is selected, you can also complete the following:

- Once on the Background Requests page, beside the Status filter, a **For saved search** link for the selected search is displayed. Click the link to return to the Saved Searches page.
- Once on the Background Requests page, click the link in the search's Status column. The log information for the selected search is displayed. Under the main navigation panel is a secondary navigation panel that displays **Background Requests** and a link for the selected search. Click the link to return to the Saved Searches page.

Description
Description of the saved search entered when the search is created.

Application
The application to which the saved search applies.

Search
The search that is the basis of the saved search (from the application's **Search Forms** page).

Last Run
The date and time on which the saved search was last run or rerun.

Records
The number of search results from when the saved search was last run or rerun.

The **Saved Searches** sub-tab also displays the following additional information in a **Details** panel for each saved search (when the search is selected in the table).

Name
The name of the user who created the saved search.

Description
The description of the saved search.

Search Criteria
The search criteria applied to the saved search, if any. Search criteria are saved as part of the saved search.

Filters
The filters applied to the saved search, if any. Filters are saved as part of the saved search.

Private
Yes if the saved search is shared. **No** if it is not.

Editors
Groups the saved search is shared with with Editor access, if any.

Viewers
Groups the saved search is shared with with Viewer access, if any.

Created By
The user who created the saved search.

Created On
The date and time on which the saved search was created.

Modified By
The user that last modified the saved search.

Modified Date
The date and time on which the saved search was last modified.

Rerun Interval
If a scheduled re-run has been configured for the saved search, the re-run interval (e.g., **1 Days**).

If the saved search selected in the table is associated with any matters, the following details of the matter(s) are displayed in a **Matter** panel and the panel's heading displays the number of associated matters in parentheses.

Name
The name of the matter.

Description
A description of the matter.

Type
The type of the matter: **Matter** or **Legal Matter**.

By default, the **Saved Searches** sub-tab is refreshed every 15 seconds. To disable auto refresh, turn the **Auto Refresh** switch off. To manually refresh the page, click the **Refresh** link.

2.7.1.2 The Matters sub-tab

The **Matters** sub-tab lists the matters created by and shared with the current user.

Each matter is displayed in a table with the following information:

Expand icon
When clicked, displays a panel listing the saved searches associated with the matter. Clicking on a saved search displays it in the **Saved Searches** sub-tab.

Name
The name of the matter.

This context menu allows you to perform the following action for the selected matter:

- Edit
- Export
- Rerun

- Share
- Re-apply Holds

Description
A description of the matter.

Type
The type of the matter: **Matter** or **Legal Matter**.

Modified Date
The date on which the matter was last modified.

The **Matters** sub-tab also displays the following additional information in a **Details** panel for each matter (when the matter is selected in the table).

Name
The name of the matter.

Description
A description of the matter.

Type
The type of the matter: **Matter** or **Legal Matter**.

Private
Yes if the matter is shared. **No** if it is not.

Editors
Groups the matter is shared with Editor access, if any. The field is visible when the matter is shared with at least one group (i.e., Private = No) and either you are the owner of the matter or it is shared with you with Editor access.

Viewers
Groups the matter is shared with Viewer access, if any. The field is visible when the matter is shared with at least one group (i.e., Private = No) and either you are the owner of the matter or it is shared with you with Editor access.

Created by
The user who created the matter.

Created on
The date and time on which the matter was created.

Modified by
The user who last modified the matter.

Modified Date
The date and time on which the matter was last modified.

By default, the **Matters** sub-tab is refreshed every 15 seconds. To disable auto refresh, turn the **Auto Refresh** switch off. To manually refresh the page, click the **Refresh** link.

2.7.2 Creating a saved search

When creating a saved search, you first run the search that will be the basis of the saved search, applying search criteria and filters, if any, as usual. Search criteria and filters are saved as part of the saved search and cannot be edited.

When a saved search is created, it runs in the background and is viewable/accessible from the **Background Requests** tab (**Request Type** is **Create Saved Search**). For more information on the **Background Requests** tab, see Working with background requests.

Once a saved search completes its run (the background request is complete), it is saved and appears on the **Saved Searches** sub-tab under the **Saved Searches** tab.

To create a saved search:

1. On the **Applications** tab, select the application you want to create the saved search for.
2. On the application's **Search Forms** page, select the search you want as the basis of the saved search.
3. In the search's **Search Form**, enter the criteria you want to apply to the search, if any. The selected search criteria will be saved as part of the saved search. For more help, see Filling a search form.
4. Click the **Search** button.
5. If the search runs in the background, on the **Background Requests** tab, click the **View** button for the corresponding background request to display results, otherwise view the search results on the **Search Results** page.
6. Optional On the **Search Results** page, apply filters to the search results (if applicable) as you normally would with a search (see Using a filter to narrow search results). The filters will be saved as part of the saved search.
7. To save the search, click the **Save Search** button on the upper-right corner of the **Search Results** page.
8. In the **Save Search in the Background** dialog, enter a **Name** for the saved search. The default name is the name of the search that is the basis of the saved search.

   Note: Saved search names are scoped to the current user and the application underlying the saved search.

9. Optional Enter a **Description** for the saved search.
10. Optional To configure the saved search to re-run at a certain interval (e.g., once per day), select the interval unit in the **Select Interval** drop-down (e.g., **Hours**) and then enter the **Rerun Interval** (e.g., **24**). For details, see Scheduling a saved search re-run.

11. Click **Save**. The saved search re-runs in the background.
12. On the **Background Requests** tab, click the **View** button corresponding to the saved search's request. The saved search appears on the **Saved Searches** sub-tab.

    Note: Depending on the number of items in the saved search, if the background request is still running, you may see an initializing state. Once processing is finished, the number of records in the saved search appears.

13. To view the saved search's results, click the saved search's **Name**.

    Note: If the search is still running, you'll need to wait until it is ready. By default, the display auto-refreshes and the saved search's **Name** appears as a link when an view the saved search.

2.7.3 Finding a saved search

To find a saved search:

1. Click the **Saved Searches** tab to display the **Saved Searches** sub-tab.
2. If applicable, click the **Filter** icon in the upper-right corner of the tab to clear filters, if any, to display all searches. Otherwise, you can filter by the following methods:

   - To filter by name, enter text matching the saved search's **Name** in the **Find a saved search** field above the **Saved Searches** table.
   - To filter by application, select the saved search's application in the **Applications** drop-down list.
   - To filter by share status, in the **Share** drop-down list, select **All**, **Private**, **Shared by me**, or **Shared with me**, as desired.
   - To filter by share access type, in the **Role** drop-down list, select **All**, **Viewer**, or **Editor** as desired.

2.7.4 Viewing saved search results

Saved searches can be accessed on the **Saved Searches** sub-tab at any time. Only saved searches created by or shared with the current user are visible on the sub-tab.

Note: If you do not have group permission to a saved search's application, you will not see the saved search, even if it owed by you or shared with you.

Saved search results can be viewed by clicking the search's **Name** on the **Saved Searches** sub-tab. The displayed results are from when the saved search was created or last re-run.

An Administrator sees all saved searches but, unless they have permission to run searches, they will not be able to view the search results. Administrators also have

the ability to delete a saved search unless it is part of a legal matter or a hold has been applied to the saved search.

You can use filtering or advanced filtering on saved search results.

Note: If you saved search results, but a Developer subsequently updated the search's result configuration, you may not be able to use advanced or quick filters, column sorting, or the group by feature on the saved search results. If a saved search has been impacted, the following icon is displayed in the results on the right side of the screen:

To resolve the issue, reload or rerun the saved search.

To view a saved search's results:

1. After finding the saved search on the **Saved Searches** sub-tab, click the saved search's **Name** in the table.
2. View the saved search's results on the **Search Results** page.

2.7.5 Rerunning saved searches

To re-populate a saved search with new data (new data may have been ingested that matches the criteria and existing data may have been disposed), the user must rerun the saved search. The saved search is re-run in the background and appears in the **Background Requests** tab (**Request Type** is **Rerun Saved Search**).

In addition to explicitly re-running a saved search, you can configure the search to automatically re-run at a certain interval (e.g, once a day).

When a saved search is rerun, the search criteria and filters saved with the search are applied. Users cannot edit these parameters. Likewise, when running a Timeline View saved search, the timeline cannot be edited (see Viewing search results in a timeline).

To rerun a saved search:

1. On the **Saved Searches** sub-tab, select **Rerun Saved Search** in the context menu next to the saved search's **Name**.
2. In the **Rerun in the Background** dialog, click **Rerun**. A background request notification (information icon) appears next to the saved search's **Name** on the **Saved Searches** sub-tab.
3. Wait for the background request to complete, then click the saved search's **Name** to view the new results. You can also view the results by clicking the saved search's **View** button on the **Background Requests** tab (once the request is complete).
4. View the search results on the **Search Results** page.

Caution

If a saved search becomes part of a legal matter, re-running the search will not be possible unless the user is part of the Retention Manager group.

2.7.6 Scheduling a saved search re-run

In addition to explicitly re-running a saved search, you can configure the saved search to re-run at a certain interval (e.g., once a day).

To schedule a saved search re-run:

1. On the **Saved Searches** sub-tab, select **Edit** in the context menu next to the saved search's **Name**.
2. In the **Edit Saved Search** dialog, in the **Select Interval** drop-down list, select the desired re-run interval unit (**Hours**, **Days**, **Weeks**, **Months**, **Years**).
3. Enter the **Rerun Interval**. For example, to re-run the search once per day, enter **1** and select **Days** in the **Select Interval** drop-down list.
4. Click **Save**.

Note: Because the server checks for re-run intervals every 30 minutes, the first instance of, for example, a one hour interval may not run until an hour and a half has elapsed.

2.7.7 Reloading saved searches

After initial creation and after each rerun, the saved search's results are cached in storage. After some time, this cache expires and the saved search remembers only the IDs of the records in the search results, not the actual data. If this is the case, an information icon appears next to the saved search's name in the **Saved Searches** sub-tab as well as on the **Details** panel. Users can click the saved search's **Name** to reload the search results from the record IDs. Reloading of results occurs in the background and appears in the **Background Requests** tab (**Request Type** is **Reload Saved Search**).

Note: The default cache expiry period is two days after the saved search was created or last accessed, but may vary depending on Global Settings (retention category).

To reload a saved search:

1. On the **Saved Searches** sub-tab, click  and select **Reload** for the saved search you want to reload.
2. In the **Reload in the Background** dialog, click **Reload**. A background request notification (information icon) appears next to the saved search's **Name** on the **Saved Searches** tab.

3. Wait for the background request to complete, then click the saved search's **Name** to view the reloaded results. You can also view the results by clicking the saved search's **View** button on the **Background Requests** tab (once the request is complete).
4. View the search results on the **Search Results** page. The disappearance of the information icon indicates that the search results are available for viewing.

2.7.8 Editing a saved search

To edit a saved search:

1. On the **Saved Searches** sub-tab, select **Edit** in the context menu next to the **Name** of the search you want to edit.
2. In the **Edit Saved Search** dialog, make changes to the **Name**, **Description**, and/or **Rerun Interval** of the saved search as needed (for details on rerun intervals, see Scheduling a saved search re-run).
3. Optional If your user role includes the RETENTION_MANAGER role, when you edit a saved search, you can apply a hold to it:

   If you user role does not include the RETENTION_MANAGER role, you can still add matter through the matter selector. Legal matters, however, are filtered out, so you can only select non-legal matters.

   a. For the **Holds** field, click the ••• icon.
   b. Select a hold policy to apply to the saved search and click **Select**.

   Tip: Use the **Search for a Hold** field to locate a specific hold.
4. Optional If your user role includes the RETENTION_MANAGER role, when you edit a saved search, you can add it to a legal matter:

   a. For the **Matters** field, click the ••• icon.
   b. Select the matter you want the saved search to belong to and click **Select**.

   Tip: Use the **Search for a Matter** field to locate a specific matter.
5. Click **Save**.

2.7.9 Deleting a saved search

To delete a saved search:

1. On the **Saved Searches** sub-tab, select **Delete Saved Search** in the context menu next to the **Name** of the search you want to delete.
2. In the **Delete Saved Search** dialog, click **Delete**.

Note: Saved searches can be deleted only by the user who created them (and Administrators). Even if other users have Editor access to them, they still cannot delete them.

2.7.10 Removing records from saved search results

To remove records from saved search results:

1. In the **Saved Searches** tab, click the link in the **Name** column of the search results you want to remove records from.
2. Select either individual rows of records to remove or select all records listed on the current page.
3. Click **Remove Records**.
4. In the confirmation prompt, click **Remove**.

A background request is created to remove the selected records. The saved search results will become available again once the background request is completed.

After removing the records, if you rerun the saved search, the records that you removed return to the search results.

2.7.11 Grouping saved searches into a matter

Once saved searches are created, they can be grouped into a matter.

To group saved searches into a matter:

1. Click the **Saved Searches** tab and then click the **Matters** sub-tab.
2. Click the **Create Matter** button on the **Matters** sub-tab.
3. In the **Create Matter** dialog, enter a **Name** for the matter.
4. Optional Enter a **Description** for the matter.
5. Click the **Select Saved Searches** button next to the **Saved Searches** field.
6. In the **Select Saved Searches** dialog, select the saved searches you want to group into the matter.
7. Click **Select**.

8. In the **Create Matter** dialog, click **Save**. The save runs in the background.
9. When the background request is complete, view the new matter in the **Matters** table on the **Matters** sub-tab.

To view the saved searches associated with a matter:

1. On the **Matters** sub-tab, click the **Expand** icon next to the matter's **Name**.
2. To view a saved search in the **Saved Searches** sub-tab, click its **Name** in the expanded panel.
3. To view the saved search's results, click its name on the **Saved Searches** tab.

Note: If a matter is shared with a user and the user is not in any group that can view the saved search, when listing the matter, the user will see the name of the saved search but will not have any access, including access to the search results.

If a matter (or legal matter) contains saved searches in applications for which the user does not have access to (due to group permissions), the user will not be able to edit the matter.

Once a matter becomes legal, only Retention Managers can edit the matter (assuming they have access to all of the saved searches in the matter). As well, it is not possible to share the legal matter unless the user is a Retention Manager.

2.7.11.1 Finding a matter

To find a matter:

1. Click the **Saved Searches** tab then click the **Matters** sub-tab.
2. If applicable, click the **Filter** icon in the upper-right corner of the tab to clear filters, if any, and display all matters.
3. Enter text matching the matter's **Name** in the **Find a matter** field above the **Matters** table.
4. To filter by share status, in the **Share** drop-down list, select **All**, **Private**, **Shared by me**, or **Shared with me**, as desired.
5. To filter by share access type, in the **Role** drop-down list, select **All**, **Viewer**, or **Editor** as desired.

2.7.11.2 Editing a matter

To edit a matter:

1. On the **Matters** sub-tab, select **Edit** in the context menu next to the **Name** of the matter you want to edit.
2. In the **Edit Matter** dialog, update the **Name** and **Description** as needed.
3. To remove a saved search from the matter, click the **X** button next to the saved search's name in the **Saved Searches** field.
4. To add a saved search to the matter, click the **Select Saved Searches** button next to the **Saved Searches** field, select the search in the **Update Saved Searches** dialog, and then click **Update**.
5. When finished editing click **Save**.

2.7.11.3 Rerunning a matter

You are able to rerun a matter after it has been created. The matter is re-run in the background and appears in the **Background Requests** tab (**Request Type** is **Rerun Matter**).

To rerun a matter:

1. On the **Matters** sub-tab, select **Rerun** in the context menu next to the matter's **Name**.
2. In the **Rerun in the Background** dialog, click **Rerun**. A background request notification (information icon) appears next to the matter's **Name** on the **Matters** sub-tab.
3. In the **Background Requests** tab, wait for the background request to complete, then click the matter's **View** button.

2.7.11.4 Deleting a matter

To delete a matter:

1. On the **Matters** sub-tab, select **Delete** in the context menu next to the **Name** of the matter you want to delete.
2. To delete the saved searches associated with the matter, in the **Delete the Matter** dialog, select the **Include Saved Searches** check box.

   Any saved searches that you do not have Edit access to or that are part of another matter will not be deleted and will be listed in the **Delete the Matter** dialog.
3. In the **Delete the Matter** dialog, click **Delete**.

Note: Matters can be deleted only by the user who created them (and Administrators). Even if other users have Editor access to them, they still cannot delete them.

2.7.11.5 Creating a matter using cross-application search results

You can create a matter that includes information from a cross-application search. The procedure creates a saved search for each delegate search as well as a matter that associates the saved searches together.

1. Once a cross-application search has run, click **Show All** to access the results for one of the delegate searches.
2. Click **Create Matter**.
3. In the **Matter** tab, enter a unique **Name** and **Description** for the matter being created.
4. In the **Delegate Searches** tab, enter unique names and descriptions for each saved search.

   Note: If the names are not unique, the system will generate a name for each delegate search.
5. Click **Save**.

A background request for the creation of the matter and its saved searches is automatically generated with the matter's name followed by a timestamp.

Access the **Saved Searches** tab to edit, rerun, or delete the saved delegate searches. In the **Saved Searches** tab, access the **Matters** tab to view the matter you created. You can also edit or delete the matter from the **Matters** tab, as well as edit, rerun, or delete the saved delegate searches.

2.7.11.6 Exporting a matter that contains saved searches

Only search results that are configured for export will be included in the export background request. See section 6.6.12 “Configuring search result export” in *OpenText Information Archive - Configuration Guide (EARCORE-CGD)* for more information.

To export a matter that contains saved searches:

1. In the Matters sub-tab, click  and select **Export** for the matter being exported.

   The Export dialog is displayed. If a  icon appears beside any of the saved searches, it indicates that the search was not configured for export and will not be included in the export results.

2. Optional Update the **Request Name**.
3. Optional Update the **Export Configuration** for any of the saved searches. The configuration options depend on those set by the search designer.
4. Click **Start Background Request**.

Check the **Background Requests** tab to view the status.

2.7.12 Sharing saved searches and matters

Saved searches and matters can be shared with groups and by access type: Viewer or Editor.

2.7.12.1 Sharing a saved search

To share a saved search:

1. On the **Saved Searches** sub-tab, select **Share** next to the **Name** of the saved search you want to share.
2. In the **Share** dialog, click **Add Row**.
3. In the **Shared with** drop-down list, select the group you want to share the saved search with (e.g., to share the saved search with Search Developers, select **GROUP_DEVELOPER**).
4. In the **Roles** drop-down list, select the type of access you want to provide: **Viewer** or **Editor**.
5. To share the saved search with other groups, follow steps 2 to 4 above as desired.
6. Click **Save**.

2.7.12.2 Sharing a matter

To share a matter:

1. On the **Matters** sub-tab, select **Share** next to the **Name** of the matter you want to share.
2. In the **Share** dialog, click **Add Row**.
3. In the **Shared with** drop-down list, select the group you want to share the matter with (e.g., to share the matter with Search Developers, select **GROUP_DEVELOPER**).
4. In the **Roles** drop-down list, select the type of access you want to provide: **Viewer** or **Editor**.
5. To share the matter with other groups, follow steps 2 to 4 above as desired.
6. Click **Save**.

2.7.13 Access and authorization rules for saved searches and matters

Not every user can see all or any saved searches and matters or can perform every available action on them. Whether you can view a saved search or matter, and what you can do with it, depends on multiple circumstances. The determining factors are the following:

- Whether you are its original creator
- Whether it has been shared with you and, if so, as Viewer only or also as Editor
- Which roles you have as an OpenText Information Archive user (e.g., Administrator, End User, Developer, etc.)
- For a saved search, whether you have access to its application and its search set
- For a matter, whether you have access to its saved searches, and what type of permission you have on them

Based on these factors, the following rules apply generically:

- If you do not have access to an application, you do not have access to any of its saved searches, regardless of whether they were shared with one of your groups or even if you are the creator.
- If you do not have Viewer access to a saved search, you cannot share or edit any matter the saved search is a part of.
- If you do not have access to a saved search's search set or its search results, you cannot reload or rerun it. In addition, you cannot share or edit any matter the saved search is a part of.
- If a matter is shared with you for viewing/editing, all of its saved searches are automatically shared with you for viewing/editing.
- If none of your roles (through the groups you are a member of) allows you to create/view/update saved searches or matters, you cannot perform these actions, regardless of whether the saved searches or matters were shared with you.

The two tables below outline these rules, matching four types of users with the actions they can perform on saved searches and matters. The four types of users are the following:

1. **Creator:** The original creator of the saved search or matter. The Creator is assumed to not also have the Administrator role.
2. **Viewer:** A user with whom the saved search or matter is shared with view-only access. The Viewer is assumed to not also have the Administrator role.
3. **Editor:** A user with whom the saved search or matter is shared with edit access. The Editor is assumed to not also have the Administrator role.
4. **Administrator:** A user who has the Administrator role. It is assumed the Administrator is not also the Creator or one of the sharees.

For each user type, the tables list their permissions for saved searches and matters, with and without holds.

Note: Y in a cell is still conditional on the general rules listed above.

Table 2-1: Saved searches

	View	View Search Results	Edit	Share	Remove items	Rerun	Delete
Creator	Y	Y	Y	Y	Y	Y	Y
Viewer	Y	Y	N	N	N	N	N
Editor	Y	Y	Y	Y	Y	Y	N
Administrator	Y	N	N	N	N	N	Y

Table 2-2: Matters

	View	Expand	Edit*	Share	Delete
Creator	Y	Y	Y	Y	Y
Viewer	Y	Y	N	N	N
Editor	Y	Y	Y	Y	N
Administrator	Y	N	N	N	Y

*Includes adding/removing saved searches.

Important

When a Retention Manager starts working with a saved search or matter created by them or shared with them to apply a legal hold, even for the original Creator (if not a Retention Manager), the rules are different. The result is increased access for the Retention Manager and reduced access for non-Retention Managers. For details, including the corresponding permissions tables, see section 9.13.3.4 "Access and authorization rules for legal saved searches and matters" in *OpenText Information Archive - Configuration Help (EARCORE-H-CGD)*.

2.8 Exporting search results

Depending on how OpenText Information Archive and its searches are configured, you may be able to export search results to different file formats, such as HTML, PDF, CSV, and images. You can then use this data in other applications, such as Microsoft Excel.

You can select all or only some of the search results to export. The total number of search results and the number of items selected, are displayed next to the **Select All** check box. When you select one or more search result items, the **Export Options** list is displayed above the results.

If search results are configured to be exported, you can export the results as a background request. You may also be able to export search results as an instant download, depending on how OpenText Information Archive and the search are configured.

When you export search results as a background request, the results are displayed on the **Background Requests** page. For more information, see Working with background requests.

When you export search results as an instant download, you can immediately download the export file.

There is a limit to the number of search results that you can export as an instant download, and this limit is set by the Administrator. For example, if the limit is set to 30 items, you can export 30 items or less as an instant download. If you select more than 30 items, you must export them as a background request.

To export search results:

1. Perform a search.
2. Select one or more search results. To select all the search results, select the **Select All** check box.
3. Click the **Export Options** list and choose the type of export that you want:
   - To export the search results as a background request, select one of the **Prepare Export in Background** options, if available.
   - To export the search results as an instant download, choose one of the **Instant Download** options, if available.

2.9 Troubleshooting

If you create a saved search or background search, but a search designer subsequently modifies the result configuration, you will not be able to use any advanced filters or sort the results. If this scenario occurs, the **Advanced Filters** button is disabled for the updated search and a warning is displayed.

To resolve the issue, rerun the search.

Chapter 3

Working with background requests

When certain tasks are initiated, the system processes them asynchronously as background requests, and the results are displayed on the **Background Requests** page. These tasks include:

- Running a search in the background
- Exporting search results

3.1 Viewing the Background Requests page

On the **Background Requests** page, each request is displayed in a table that contains the following information:

Name
The name of the background request. By default, the name for the request includes the date and time the request was initiated.

User
The username of the person who initiated the background request.

Type

- **Search**: The results are from a background search (see Running a search in the background).
- **Cross-Application Search**: The results are from a cross-application search (see Viewing a cross-application search).
- **Create Saved Search**: The results are from a created saved search (see Creating a saved search).
- **Reload Saved Search**: The results are from a reloaded saved search (see Reloading saved searches).
- **Rerun Saved Search**: The results are from a rerun saved search. Order items for automatic/scheduled reruns are only included if you came from a saved search.
- **Export**: The results are from a user exporting search results (see Exporting search results).

Application
The application the request was initiated from.

Submission Date
The date and time the request was initiated.

Duration

The time the operation took to finish. Is not updated until the status is complete.

Status

- **In Queue**: The request has been submitted.
- **In Progress**: The request is still running.
- **Canceled**: The request was canceled.
- **Cancel Requested**: A request to cancel the background request was received. Only some background requests support canceling.
- **Completed**: The request completed with no errors.
- **Exception**: Something went wrong with the request.

View, Download, or Cancel

- **View** applies to search result requests.
- **Download** applies to export requests, assuming that an artifact was generated and can be downloaded.
- **Cancel** is only available for certain requests and can be done using the **Cancel** menu item.

By default, the **Background Requests** page is refreshed every 15 seconds. To disable auto refresh, turn the **Auto Refresh** switch off. To manually refresh the page, click the **Refresh** link.

3.2 Finding a background request

To find a request on the **Background Requests** page, you can use the **Find by Name**, **Applications**, **Request Type**, and **Status** filters.

To find a background request:

1. Use the filters as follows:

   - **Find by Name**: Type the full or partial name of the request that you want to find to match as follows: **Contains**, **Exact Match**, **Begins with**, and **Ends with**. If you choose to search for an **Exact Match**, the search is case-sensitive.
   - **Applications**: Choose the application for the request that you want to find.
   - **Request Type**: Choose the type of request that you want to find. You can opt to view all available requests or select one of the categories of requests that are currently available.
   - **Status**: Choose the status of the request that you want to find. The options are **All**, **Active**, and **Inactive**.

- **All Users**: When selected, the background requests of all users are displayed. Type the full or partial name of the request that you want to find to match as follows: **Contains**, **Exact Match**, **Begins with**, and **Ends with**.

2. To clear the filters and view all requests, click the **Clear Filters** icon on the upper-right of the page.

3.3 Viewing search results from a background search

You can view the results of a background search once the **Status** is **Completed**. Click the **View** button in the results to review the search results for a particular search.

The Search Developer may have placed a quota on the number of results returned in a particular search. If so, a message on the right-side of the result screen indicates **Partial Result**. Click the information icon for further information.

To navigate to a specific page, enter the page number in the field and click **ENTER**.

Note: If you ran a search in the background, but a Developer subsequently updated the search's result configuration, you may not be able to use advanced or quick filters, column sorting, or the group by feature on the background search results. If a background search has been impacted, the following icon is displayed in the results on the right side of the screen:

To resolve the issue, rerun the background search.

3.3.1 Viewing cross-application results from a background search

A cross-application search can run as a background request. Once a background search has been initiated, navigate to the Background Requests page to view the status of the request and, once it has completed its run, the results of the search.

Click the **View** button to review all of the delegate searches at once (refer to Viewing cross-application search results for more information).

Click the link in the **Status** column to view the names and information from each of the delegate searches. When the cross-application search has completed its run, click the **View** button to just view the results from the selected delegate search.

3.4 Viewing log information for a background request

To view log information for a background request:

1. Click the link in the search's **Status** column (for example, the **Completed** link).
2. On the **Logs** page, do any of the following:

To find specific log information
Use the **Find a Log Item** box. Filters the log entries to only show entries that match the text. Supports partial matches.

To show or hide particular levels of information
Use the following check boxes:

- **Info**: shows general information about the request
- **Warn**: shows warnings about the request
- **Error**: shows errors that were encountered during the request
- **Debug**: shows debugging information about the request

To download log information
Click the **Download diagnostic logs** link to the right of the page. Log information is useful if you require support.

3.5 Managing background requests

The **Background Requests** page allows you to manage background search requests using the **Manage Requests** button. You can either:

- **Cancel all active requests:** Cancel requests with a status of **In Queue** and **In Progress**, including active filters. If you do not cancel the request quickly enough, the operation will complete successfully.
- **Delete all inactive requests:** Deletes all requests with a status of **Completed**, **Canceled** or **Failed**, including active filters. It is possible to also select a specific background request to cancel or delete (click the **Cancel** button or the  icon beside the **Status** column).

For both operations, the Status filter is disabled.

To cancel all active requests:

1. Click the **Manage Requests** button and select **Cancel Active**.
   The **Cancel All Active Background Requests** dialog box appears.
2. Click **Cancel All** to cancel requests with an **In Queue** or **In Progress** status, including active filters.

The **Status** column will display **Cancel Requested**. Once the cancel operation has completed, the **Status** column will state **Canceled**. A **Retry** button might appear beside the **Status** column, depending on the operation (for example, the button appears for searches but not for a canceled **Apply Hold** operation). Click the **Retry** button to rerun the original request.

To delete all inactive requests:

1. Click the **Manage Requests** button and select **Delete Inactive**.

   The **Delete All Active Background Requests** dialog box appears.

2. Click **Delete All** to delete requests in **Completed**, **Canceled** or **Failed** status, including active filters.

   All inactive background requests are deleted from the **Background Requests** page.