Search Help Overview

Other Help:

Reference to Search Assistant Screen

ECM Library Master Help Index

Search Introduction:

ECM Library can be used for the simplest of searches …. But when it's critical to find that one document, you can do **much** more. Learning to use various search options will lead to more specific and exact results. Most of the search query options are available through menu checkboxes.   In addition, there is a search language, or "query syntax", that gives you quick search access by directly entering in keywords.

Contents

ECM Library Text Search Syntax Quick Tips
for main search command line
For menu driven search: right-click to see the Search Assistant screen.

Exact Word or Phrase	Results
"Maggie Smith" Maggie *Searches are case insensitive*	Maggie smith, maggie smith, MAGGIE SMITH, maggie, Maggie, MAGGIE

Inflectional searches	Results
^Run *Searches on one word and not a phrase*	run, runs, running and ran *See search assistant to view list of inflections for a word*

OR	Results
peace OR treaty	*Peace, treaty, Peace (and) treaty, Peace (and) TREATY etc* *Search results will bring back any combination of any search keywords.*

Wildcards	Results
tree* *tree "John Sch*"	treed, treen, treetop, trees *exact results only – wildcard works for the end of words only* John Schmidt, John Schulz, John Schultz

AND	Results
Bill AND Dave bill +Dave Bill + Dave Bill dave	Bill *(with)* Dave Bill *(with)* dave BILL *(with)* DAVE etc. *spaces assume an "and" between*

Near or Proximity Search	Results
"Dave Smith" NEAR "Thomas Bartlett"	"Dave Smith" *'s name will be in the same document as "Thomas Bartlett"* *Weightings must be turned on to identify how near and how often these two words appear.*

Classonomy – Customized Searches	Example customized results
~claim ~competitivesearch	Customer Record 565A, Company XYZ Standard Claims Form Transact Data Corp, Maztra Development Inc., Seabuild Corp.

Your company administrator needs to populate the Classonomy using "Microsoft Thesaurus through SQL Server" in order for you to use this function.

ECM Library Thesauri	Example Potential Results
record	Record, conduct, evidence, indication, security, superiority

Must be done through the Search Assistant which can be found via a right-click mouse

* If you use search syntax (e.g. ~ ^) and then use search assistant, you need to clear out the syntax first in order for the search assistant to work.

Search Option Details

Search Screen

- Reset: Reset current search
- ***Submit: Submit to search engine***
- Count: Get a count of documents/emails that will be returned in this search
- Show Basic Cols: There is a standard set of columns. Select this to use the default set
- GenSql: Generate the search SQL that will be used executed by the Search engine.
- Help: Show the online user help

- Groups: Open the groups editor
- User Mgt: Open the User Management screen
- Save Search: Save the current search
- Search Parms: Open the Static Search Parameters Editor
- ISO Storage: When clicked, local ISO storage will be purged. Similar to a cookie.
- Export: Export the currently displayed search results to a specified format.
- Functional Help: This opens the help for the system level functions such as the Services and Database calls.
- Search: Opens the Search Scheduler
- Alerts: Opens the Alert editor
- Download: Downloads the selected files and stores them in the defined working directory.
- View: Opens the working directory so the downloaded files can be opened.

Text Searches Are Not Case Sensitive

ECM Library search queries are not case sensitive. However, when you find a document you want to review, and you open that document, that software application (e.g. Adobe Reader) may have a search engine that is case sensitive for viewing that document.

Exact Search Match

For an exact word search just enter in a word or words without quotations. For example:
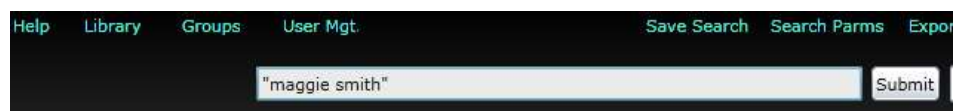
Maggie

Will bring back all documents that contain Maggie, Maggie, MAGGIE, but no other words. Adding another word right after Maggie will default to an AND statement. For example:

Maggie Smith

Will look for documents with Maggie in a document, AND Smith in a document.

Phrases should be enclosed in double quotation marks (""). For example:

In this search, ECM Library will look for files/documents that contain specifically Maggie Smith as an exact phrase.   All searches are case insensitive, which means it doesn't matter how you capitalize the letters – or not.   For example, typing "*maggie smith"* will return all content containing the words like "Maggie Smith, maggie smith," or "MAGGIE SMITH" or "meggie smith"

Back to top

Noise Words

There are many words that are disregarded in the search as they are considered "noise words".

These words will be ignored in a search if included in your search words.   Examples are:

we	were	through	too	such	over	must	just
way	well	that	very	take	out	never	for
was	will	the	up	see	other	no	from
want	with	their	use	said	or	many	get
who	would	them	under	same	our	me	got
when	you	then	should	re	might	make	had
where	your	there	since	now	more	like	has
which	than	these	so	of	most	it	have
while	this	they	some	on	much	is	in
what	those	to	still	only	my	its	into
if	do	by	0	E	S	I	after
he	each	but	1	F	T	at	Y
here	else	came	2	G	N	any	Z
her	be	can	3	H	O	are	about
how	because	could	4	A	P	as	XXXVIII
his	been	come	5	B	D	an	XXXVII
him	before	W	6	9	M	and	XXXVI
himself	being	X	7	U	J	another	
did	between	V	8	Q	K	also	
does	both	$	C	R	L	all	

Searching on Financials or Numbers:

If you are searching on financials or numbers you need to have it written out exactly for the search to come back. Ideally your search has quotations around it with the exact information inside. E.g. "41,345.00"

Do not use commas unless you put quotations around a number with the commas. A search will be able to find numbers in documents with commas in them if you enter in the number with no quotes and no commas. If you are not sure if the number has a comma or not, or if it has a $ in front or not use quotations with OR statements   e.g. "$40000" OR "40000"

Wildcard use: Doing a combination of wildcards with numbers that contain commas within the searched documents may not retrieve as expected. A retrieved comma will eliminate the wildcard in the search engine results. An exact search is recommended whenever possible.

However, once you open up a document or file, that document type may be search sensitive to commas so exactness may be needed within any particular document.

If you put down a time, you need to put quotes around it e.g. "5:30"; otherwise you'll get a syntax error.

Back to top

Using Search Assistant Search Parameters

Search Assistant can be reached a right-click mouse almost anywhere on the search screen. Search

assistant can set up searches for "all of these words", an exact phrase, "any of these words", words near each other, inflections, classonomy or thesaurus expansions or a combination of any of these search operators. Once you have your search set up, click "gen/view" and then click "okay". It will bring back to the search screen – press enter to search. Search Assistant can be combined with Search Filters.

Inflectional Search

Inflectional searches handle grammatical relations to a word such as tense, number, gender etc. More specifically, the plural and singular, as well as the gender and neutral forms of nouns, verbs, and adjectives will be matched.

If a word is searched with *^Run :*

The search query is asking "find any words that are similar to *run* in one document". The search engine will look for inflectional use of the word *run*, such *as run, runs, running* and *ran*. Without a weighted search on, all documents will be presented in order of what is retrieved by the search engine, and not in order of best search matches. Using a weighted search with inflectional use is often the best combination.

If you want to see what words were "run" under the inflection search, then go into the Search Assistant (via right mouse click and choose Search Assistant) and you will see the words generated.

Back to top

Thesaurus Search

Accessing Thesaurus searches is only available through the Search Assistant (via right mouse click and choose Search Assistant) The Roget Thesaurus in ECM Library is the default Thesaurus unless another Thesaurus is provided by your Administrator.

1. Enter in one key word
2. Pressing the Expand button, it populates a potential listing of words on the right hand side.

3. Select the words that you would like to have included in your search. This will then populate the "or any of these words" line.

4. After you have included any other search keywords, press "GenView" and then press "Okay".

Classonomy Search

Your company has the ability to create its own Cross Reference Dictionary, where you can have expand a search to automatically include similar words.   It will expand only if your company has set it up.   The search syntax is "~" in front of each word in a search command line. Or you can use the search capability through the Search Assistant.

Your ECM Library database administrator is responsible for training you on the type of Cross Reference Dictionary used. You could have either a "substitution" listing or an "expansion" listing. For example, if you enter in the acronynom "ECM", the Cross Reference Dictionary may automatically substitute so "ECM" to only search on "Enterprise Content Management". Or if you enter in ECM, the Cross Reference Dictionary may expand ECM into searching on many similar words for your search, such as "content management" "archive" "search and retrieval" "e-Discovery" etc. For administrative set up help click here.
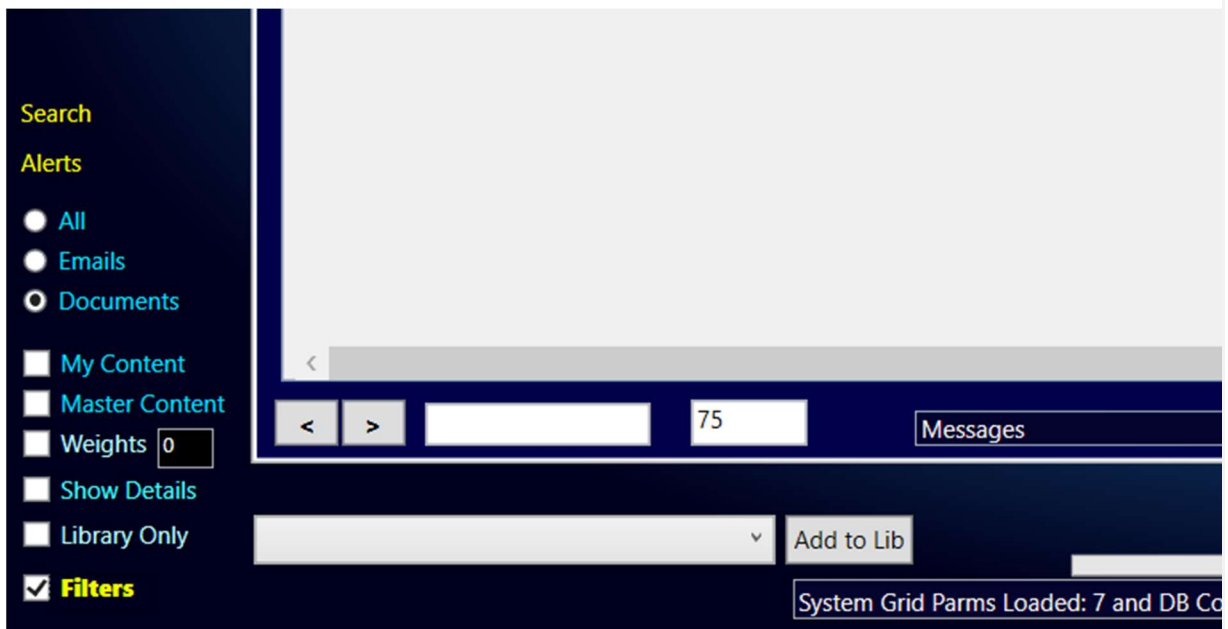
Back to top

Using Other Search "Filter" Parameters
To use other Filters click on the Filter button as shown below in the bottom left hand cornet:
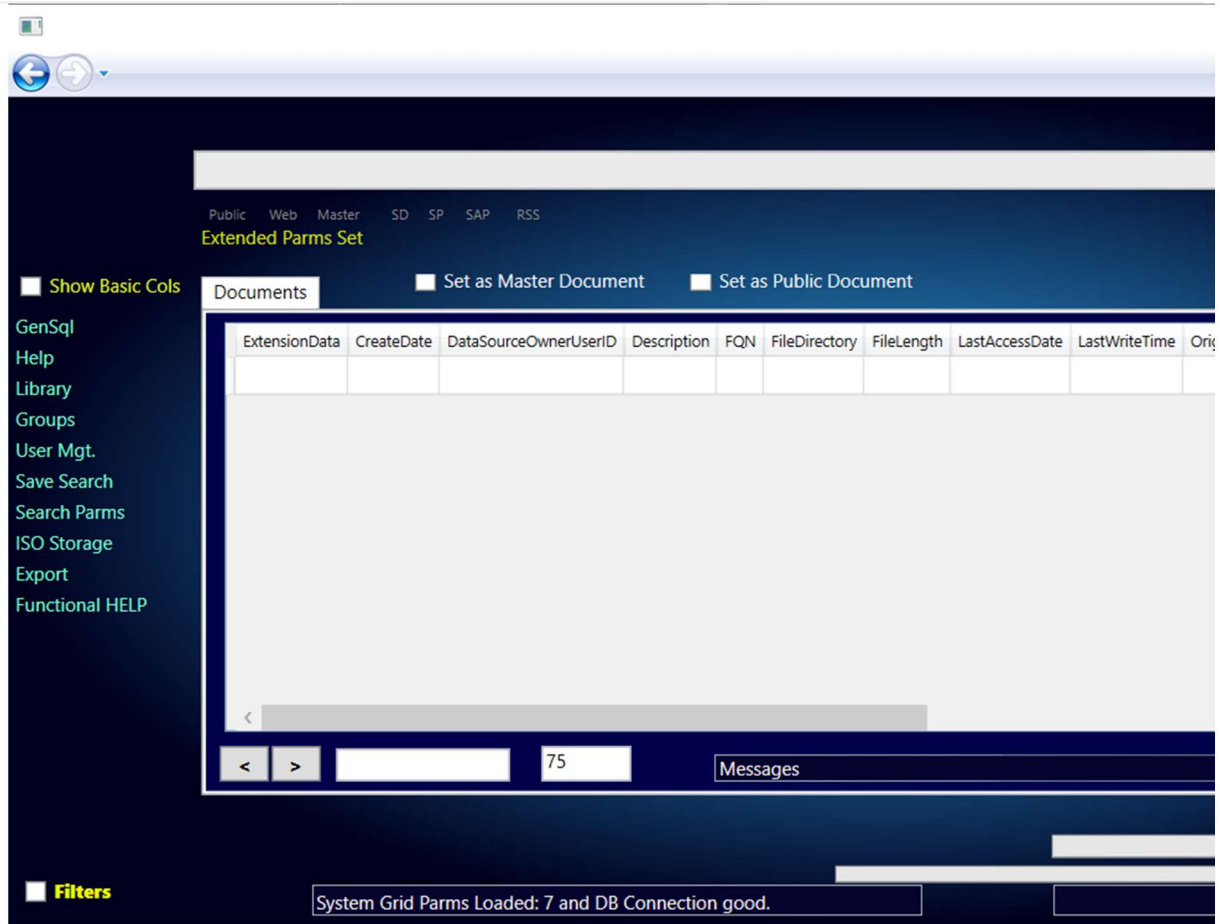
Document Filters

When the Filters checkbox is selected, the items will be presented as shown in the left.

- ALL – all documents searched

- Emails – only emails searched
- Documents – only documents
- My Content – only content you own
- Master Content – only documents classified as Master Documents
- Weights – limit search to return documents that are equal to or exceed the specified weight. (see following explanation)
- Show details – document details will be presented as part of the search
- Library Only – search only the selected library

Weights

Weights help identify the relevancy of your content results to your search query. Search results are sorted with the top line showing the highest weight ranking. Email attachments are given a separate weight ranking from the email and shown on a separate search-return row.

Library Only

Your searches automatically include the libraries to which you are a member for both emails and/or any content. You can also limit your searches just to a library. If you have access to a library, that library will be shown when you click on the down-arrow. Select a library and then if you click on the box left to "Library Only" you will limit your search to that particular library only.

My Content Only

You can search on just your content/emails. If this is not clicked, you will search across any content or emails that are public or that are in a library to which you are member. Click on "My Content Only" to search on just content that you are the source owner.

Master Content

Master content is for any documents that are "marked" as master documents. This allows you to limit your search so you restore and use the content that is marked as the master or right document to use.

Limit a Search to Emails or Contents

Click on the button to limit your search if you know you are just interested in emails or just interested in content. For extensive searches this will speed up the response of search results.

Back to top