



## Advanced Searching – User Tips

Name of Field	Additional Filters	Criteria	Additional Notes
<b>Name</b>	Contains Begins With Ends With Is	The name of the file or folder	
<b>Document ID</b>	Contains Begins With Ends With Is	The unique document identifier as assigned by the DocMoto system	The unique document identifier can be printed to the footer of a document by using the print special function within DocMoto. Users can use the document identifier to retrieve the electronic version of the document. It is advisable to use the 'Begins With' condition.
<b>File Last Modified</b>	Exactly Before After This Week Last Week This Month Last Month	The date which the user thinks the file was last modified.	Users can add more criteria to a date search to enable them to carry out a date range search. i.e. file was last modified after dd/mm/yyyy but before dd//mm/yyyy
<b>Version Name</b>	Equals Greater than or equal Less than or equal	The specific version of a file	This field should be used in conjunction with additional fields. i.e. find the file with the name = 'Agreement.docx' version Greater than or equal to 3. This will find versions 3 to 1 of the document 'Agreement.docx'.

Name of Field	Additional Filters	Criteria	Additional Notes
<b>Content</b>	All Words Any Word Phrase Advanced Quick Search	Terms of words expected appear within a documents content.	<p><b>All Words</b> - Returns a match when a file contains all the specified words</p> <p><b>Any Word</b> - Returns a match when a file contains any of the specified words.</p> <p><b>Phrase</b> - Matches the entire phrase</p> <p><b>Advanced</b> - Use spotlight query syntax to define the criteria.</p>
<b>Checked Out Date</b>	Exactly Before After This Week Last Week This Month Last Month	The date which the file was checked-out.	Users can add more criteria to a date search to enable them to carry out a date range search. i.e. file was checked-out after dd/mm/yyyy but before dd//mm/yyyy
<b>Version Depth</b>	N/A	Current Last 3 Any	<p>Version depth is a concept used within a DocMoto advanced search. It allows a user to specify the number or 'depth' of revisions an advanced search should query. The default setting is 'Current' which results in the latest version being searched. The complete list is as follows:</p> <ul style="list-style-type: none"> <li>• <b>Current</b> - Only the latest revisions are searched</li> <li>• <b>Last 3</b> - Last 3 revisions searched.</li> <li>• <b>Any</b> - All revisions searched.</li> </ul>
<b>Comment</b>	Contains Begins With Ends With Is	Terms or words expected to appear within the comment field of a document	

Name of Field	Additional Filters	Criteria	Additional Notes
<b>Audit (group) &gt; Checked In By (tag)</b>	N/A	<Any User> list of named users ... ...	Users can search by any user or a specific user for checked out files by said user.
<b>Audit (group) &gt; Created By</b>	N/A	<Any User> list of named users ... ...	Users can search by any user or a specific user for documents which have been created by said user.
<b>Audit (group) &gt; Checked In On (tag)</b>	Exactly Before After This Week Last Week This Month Last Month	The date which the the file was checked-in on.	Users can add more criteria to a date search to enable them to carry out a date range search. i.e. file was checked-in on after dd/mm/yyyy but before dd//mm/yyyy
<b>Audit (group) &gt; Checked Out Username (tag)</b>	N/A	<Any User> list of named users ... ...	Users can search by any user or a specific user for checked-out files.
<b>Audit (group) &gt; Version Size (tag)</b>	Greater than or equal Less than	The size of a file	Users can search by the size of a specific version of a file and can further specify the size range as follows: <ul style="list-style-type: none"> <li>• bytes</li> <li>• KB</li> <li>• MB</li> <li>• GB</li> </ul>
<b>Office (group) &gt; Author (tag)</b>	Contains Begins With Ends With Is	The name of the author of a specific MS Word document.	The author's name must be saved within the MS Word document properties for this search to be applicable.

Name of Field	Additional Filters	Criteria	Additional Notes
<b>Office (group) &gt; Comments (tag)</b>	Contains Begins With Ends With Is	The comments assigned to the summary of a specific MS Word document.	The comments must be saved within the MS Word documents properties for this search to be applicable.
<b>Office (group) &gt; Company (tag)</b>	Contains Begins With Ends With Is	The company name assigned to the summary of a specific MS Word document	The company name must be saved within the MS Word documents properties for this search to be applicable.
<b>Office (group) &gt; Keywords (tag)</b>	Contains Begins With Ends With Is	The keywords assigned to the summary of a specific MS Word document	The keywords must be saved within the MS Word documents properties for this search to be applicable.
<b>Office (group) &gt; Title (tag)</b>	Contains Begins With Ends With Is	The title assigned to the summary of a specific MS Word document.	The title must be saved within the MS Word documents properties for this search to be applicable.
<b>Email (group) &gt; Subject (tag)</b>	Contains Begins With Ends With Is	The subject of an email.	Users can use the additional filter to enable them to insert part of the subject field. i.e. If the subject of the email is "Confidentiality Agreement" the search can be: Subject Begins With "Confidentiality".
<b>Email (group) &gt; Addresses (sub-group) &gt; From (tag)</b>	Contains Begins With Ends With Is	The name of the recipient of an email.	Users can use the additional filter to enable them to insert part of the recipient name. i.e. If the recipients name is "John Doe" the search can be: From Ends With "Doe".
<b>Email (group) &gt; Addresses (sub group) &gt; To &amp; CC &amp; BCC (all tags)</b>	Same as above	Same as above	

Name of Field	Additional Filters	Criteria	Additional Notes
<b>File Type - refer to additional notes</b>	Contains Begins With Ends With Is	The file extension of the file being searched for. i.e. pdf, docx, xlsx, etc	It is possible for administrators to configure DocMoto so that file icons reflect the file type. If this is true then please refer to the next entry in the table.
<b>File Type (configured by admin)</b>	N/A	List of file types... DOC DOCX PDF etc...	

- \* This list contains the most commonly used search terms, it is not an exhaustive list of all items which can be searched within the DocMoto system.
- \* We will be updating this document with examples of combined searches, accompanied by screenshot examples.

### Summary:

Advanced searches provide a powerful way to search the DocMoto repository. Once defined an advanced search can be saved for future use.

### To define and run an advanced search:

1. Highlight the folder you wish to search in the tree-view (left-hand side of UI) and click on the small triangle in the "Search" box (or use the shortcut cmd + s) and select "Advanced Search".
2. Add the search criteria.
  - 2.1. You can add as many search criteria as you wish. Each criteria is treated as a logical "AND" so effectively refines the search.
3. Select the columns of data you wish the search to return by choosing "Columns" - This is optional.
4. Run the search by clicking on "Run".
  - 4.1. A DocMoto advanced search will return the first 50 matches it finds. If there are more than 50 results the additional results can be retrieved by choosing "More". **Note:** All searches retrieve the latest information by default. If searches do bring back more than 50 an argument can be made that either the search criteria is too vague or the search is being run from a too high level of folder.
5. If you wish to reuse the advanced search save it by choosing "Save As".

Once saved you can reuse an advanced search. To run a saved search select the folder you wish to search in the tree-view. Then select the advanced search you wish to run from the "Saved Searches" (accessible by clicking on the small triangle within the "Search" box). Running the advanced search will return all matches for the selected folder.