

## 5. Searching for articles

You can search for articles that match your criteria. You must be in a view to search for articles. Later versions of edDesk will let you search from the navigation pane, without having to select a view to search in. This will mean that you can easily search your entire database.

### 5.1 OBJECTIVES

By the end of this chapter you should be able to:

- open the search bar from within a view
- enter words and phrases as your search criteria
- use the Boolean operators – AND, OR, NOT
- use wildcards
- use a simple search to find articles containing particular words
- use the advanced search feature to find articles matching criteria that you specify.

### 5.2 SEARCHING IN VIEWS

You can use the **Search** form in many views to list only those articles that match your criteria.

For example, you have selected the view All Issues but only want to view those articles which contain the word "payroll". You would use Search to list only those matching articles.

Views filter the articles so only those that match the view criteria are displayed. When you use Search you are refining the criteria and looking for articles in that view.

#### Searching all articles

Use the view All Issues (available from the Navigation pane in every tab) if you want to search through your entire database.

#### Searching all entries

Use the view All Documents (available from the navigation pane in the Home tab) to list all items in your database. This is particularly useful if you have created an entry and cannot remember where you put it (ie. What section and subsection, volume or issue you entered) or whether it was created as an article or library item.

### 5.3 OPENING THE SEARCH BAR

You need to open the **Search** bar before you can conduct your search.

1. Go to the view in which you want to search.
2. Click on <Search Bar>.
3. The **Search** bar displays, as below.



Figure 25: Search bar in view "Sections"

### 5.4 TEXT SEARCH OPTIONS

This section instructs you how to format your search text. All text entered is entered in the Search for field.

#### i Searching for a single word or a phrase

1. Put your cursor in the Search for field.
2. Type the word or phrase to search for.
3. Click <Search>.

#### Common words

If you search for common words you will probably return a long list of matching articles. Then you either have to navigate to the ones you want, or try to further refine your search.

Very common words, such as "the" will be ignored by the search engine.

#### ii Using Boolean operators – AND, OR, NOT

edDesk's operators are similar to the Boolean operators used by most search engines on the web. They are not case sensitive – AND, and, And are the same.

#### AND

The AND operator finds articles which contain all the words linked by AND. The words may appear in any order, in phrases or in isolation.

*Example 1:* **digital AND camera AND quality** will find all articles that contain all three words.

*Example 2:* **digital camera AND quality** will find all articles that contain the phrase 'digital camera' and the word 'quality'.

1. Click in the Search for field.
2. Type the first word or phrase.
3. Type AND .
4. Type the next word or phrase.
5. Repeat steps 3 and 4 until you have typed all the words to search for.

6. Click <Search>.

### **OR**

The OR operator finds articles which contain either of the words or phrases. Your results are listed in order with the most occurrences at the top of the list.

The OR operator returns a longer list of articles than the AND operator. The more words you have separated by the OR operator, the longer the list of resultant articles will be.

*Example 1:* **digital OR camera** will find all articles that contain at least one of the words.

*Example 2:* **digital OR camera OR dog** finds all articles that contain at least one of the words. This is likely to be a longer list than in example 1.

1. Click in the Search for field.
2. Type the first word or phrase.
3. Type OR .
4. Type the next word or phrase.
5. Repeat steps 3 and 4 until you have typed all the words to search for.
6. Click <Search>.

### **NOT**

The NOT operator makes your search query negative. You are saying that you want to find articles that do NOT contain particular words or phrases. NOT is usually used in conjunction with AND.

*Example 1:* **digital AND NOT camera** finds all articles that contain the word 'digital' but not the word 'camera'.

#### **Important**

You must type in AND before NOT. If you don't you will receive an error message "Query is not understandable."

1. Click in the Search for field.
2. Type the first word or phrase.
3. Type AND NOT .
4. Type the next word or phrase.
5. Click <Search>.

## 5.5 SLIGHTLY MORE COMPLEX SEARCHES

This section instructs you in performing more complex searches, using a combination of operators and wildcards.

### i Determining the order in which your search criteria is processed

Parentheses are used to tell edDesk which order to process your search criteria. The part of your search criteria enclosed in parentheses is processed before parts outside the parentheses.

*Example 1: (digital AND camera) OR photograph* finds all articles that contain both the words 'digital' and 'camera' or the word 'photograph'.

*Example 2: (digital OR camera) AND (photograph OR magazine)* finds all articles that contain at least one of 'digital' or 'camera' and at least one of 'photograph' or 'magazine'.

### ii Wildcards

#### \* (asterisk)

The \* is used as a wildcard. It represents any number of letters. The \* is particularly useful if you want to search for a word that may have a variety of endings, or a variety of standard spellings. It does not work with numbers.

*Example 1: swim\** finds swim, swims, swimming

*Example 2: \*one\** finds any word with the letters 'one' – one, sandstone, cone and so on.

*Example 3: mari\*uana* finds both marijuana, marihuana and 'Maria iguana'

#### ? (question mark)

The ? represents a single letter. It does not work with numbers. You can use more than one ? wildcard in your search criteria.

*Example 1: ?ick* finds lick, sick, hick and so on

*Example 2: clo??* finds, cloth, clock and so on

*Example 3: mari?uana* finds both marijuana and marihuana

## 5.6 ADVANCED SEARCH

The search bar lets you search for articles containing various words, phrases and combinations of these. If you want to further control your search criteria there is a more advanced search feature available.

#### Note

Advanced means that you can do more, not that it is harder to use.

1. Go to the view in which you want to search.
2. Click on <Search Bar>.
3. The **Search** bar displays, as below.



Figure 26: Search bar with More expandable menu at bottom right of search bar.

4. Click on <More>.
5. The **Advanced search** bar displays.



Figure 27: Advanced search bar

6. Search for: enter the text to search for. ① see [section 5.4: Text search options](#) and [section 5.5: Slightly more complex searches](#)
7. Refer to the following sections for detailed instructions on completing the search form.

## i **Conditions**

This is a very powerful part of the advanced search. Remember that the more conditions you add to a search, the more your results will be limited (expect fewer results with more conditions).

Only the most commonly used (and most useful) conditions are explained here.

### **Date**

If you want to limit your results to only those articles with certain created or modified dates then use this condition.

1. Click on <Date...>.
2. The **Add Condition** dialogue box displays as below.

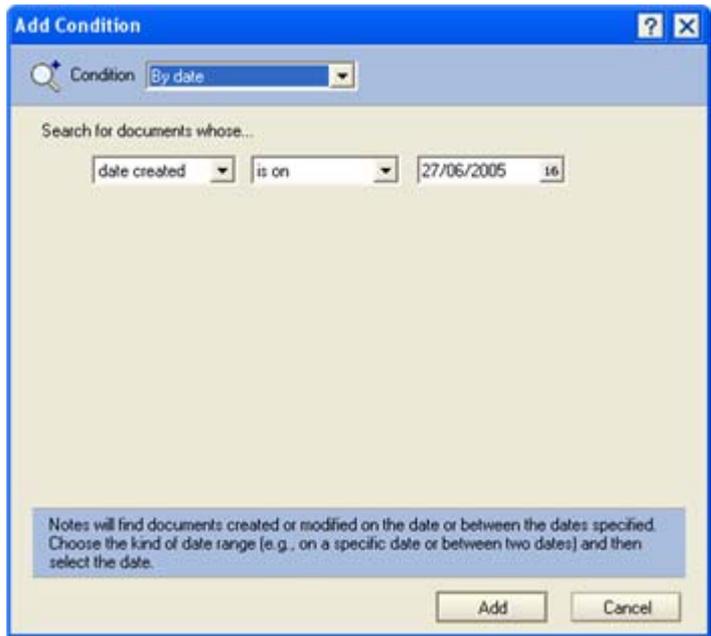
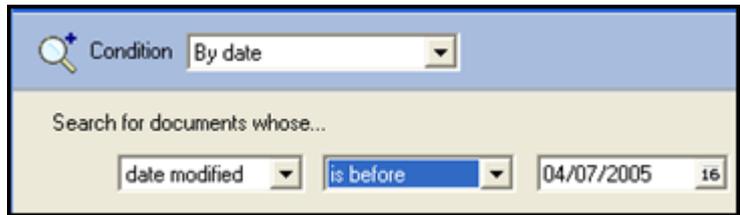


Figure 28: Default values in Date condition dialogue box

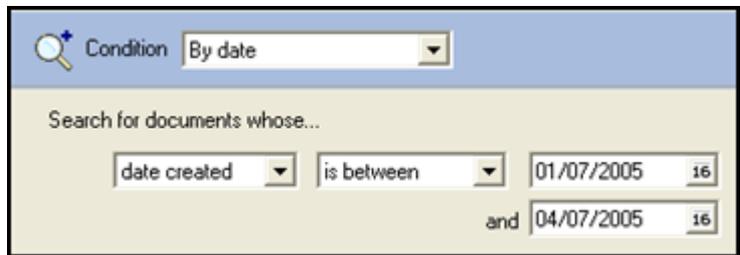
3. **Condition:** lets you select a range of conditions for articles to match. At the moment you have selected *By date*.
4. **Search for document whose...:** the options you see depend on the selected condition. The default for the condition *By date* is to search for articles created on the current day.

Click on the dropdown arrows to change the details.

Example 1: date modified is before 04/07/2005



Example 2: date created is between 01/07/2005 and 04/07/2005



5. Click on *<Add>* to add the condition to your search criteria.

## Author

You can add the Author condition to find articles by particular people or to exclude articles by particular people.

1. Click on <Author>.
2. The **Add Condition** dialogue box displays as below.



Figure 29: Default values in Author condition dialogue box

3. Condition: your currently selected condition is *By author*.
4. Author: select from:
  - *is any of* to find articles by particular authors
  - *is not any of* to find articles that are NOT by particular authors
5. Name: Click on the  to see a list of authors in your organisation.
  - a. Select each author and click on <Add>.
  - b. Click <OK> when you have selected the required authors.
6. Click on <Add> to add the condition to your search criteria.

**Fill out example form**

If you do not feel confident to add conditions then use the *Fill out example form* option. This lets you enter your conditions in a screen that looks like an article. You can click on the article tabs to navigate to the required fields.

Figure 30: Default values for Fill out example form dialogue box

1. Click on the tab that contains the information you want to search by.
2. Enter your search criteria by:
  - Typing into the field – for example subject of acme. OR
  - Selecting it from a list of options – for example articles that have the copy status of concept.
3. Click on <Add> to add the example form to your search criteria.
4. The advanced search screen displays with the Search for field now containing “*matches example form*”.

### Multiple words

Multiple words is a different (and simpler) way of searching for multiple words or alternative words. If you don't like using the Boolean operators AND and OR then use this form instead.

1. Click on <Multiple words...>.
2. The **Add Condition** dialogue box displays as below.

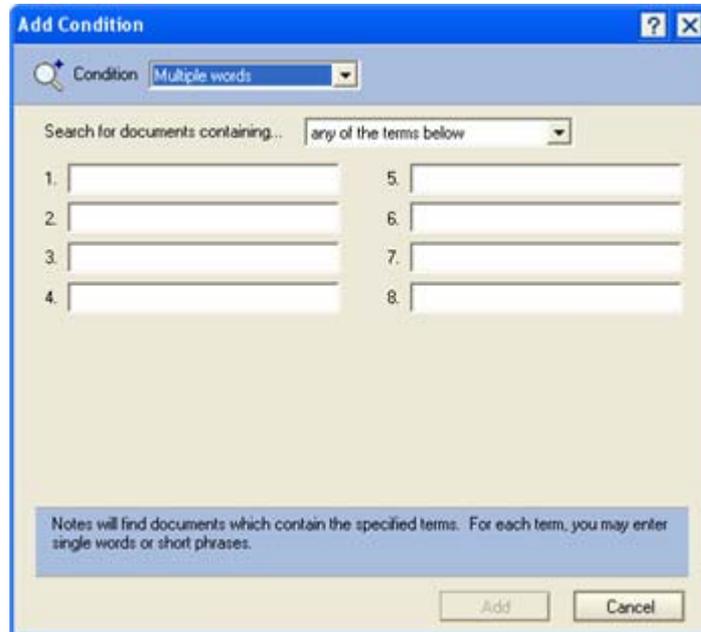


Figure 31: Default values in Multiple words condition dialogue box

3. Search for documents containing...
  - any of the terms below – same as using OR. This finds all articles that contain at least one of the words you enter.
  - all of the terms below – same as using AND. This finds all articles that contain ALL of the words you enter.
4. Click on <Add> to add your words to the search criteria.

### ii Editing your conditions

You may have entered some search conditions that you want to change, without having to enter them completely again.

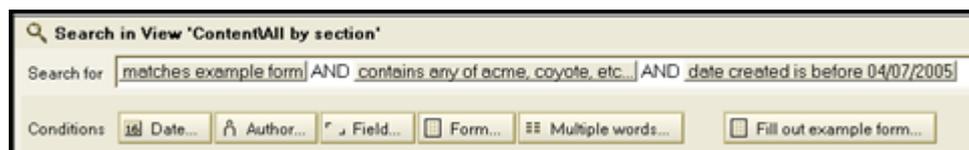


Figure 32: Current conditions for this search

1. Click once on the condition to be edited. This selects the condition.
2. Double-click on the condition.
3. You are taken to the dialogue box with the condition.

4. Make your edits.
5. Click on <Add> to accept your edits.

### iii Options

There are two text search options available in Advanced search.

#### **Use word variants**

Tick this option to find any base word with certain suffixes.

For example swim also finds swims, swimmer but not swam or incorrect words.

#### **Fuzzy search**

Tick this option to find words and phrases that are similar to your search criteria. This is particularly useful if you don't know exactly how something could be phrased.

For example, communication also finds articles with communicate, communicated. User requirement also finds articles with user group requirement.



Figure 33: Advanced search with the options Use word variants and Fuzzy search selected

### iv Navigating through your search results

After you conduct your search you see a list of all matching articles. You can see your search criteria in context in each article. Each search term is highlighted, with the currently selected term highlighted in pink and other terms highlighted in green.

#### **If you can't find a search term in the article consider that...**

Matching text in the Subject field is not highlighted.

If a term appears only in the article's metadata you will not see highlights.

If a term appears in an attached file the title of the attached file is highlighted.

Your index needs to be updated. See section 15.5: Updating an index.

1. Click on the required article. Your article is opened with the earliest occurring search term displayed on screen.
2. To move to the next term: press <Ctrl>+
3. To move to the previous term: press <Ctrl>-

## v Saving searches

If you have searches that you perform frequently you may save them. This means that you do not have to enter the criteria each time you want to perform that search.

1. Click on <Save search...>.
2. The **Save Search** dialogue box displays.

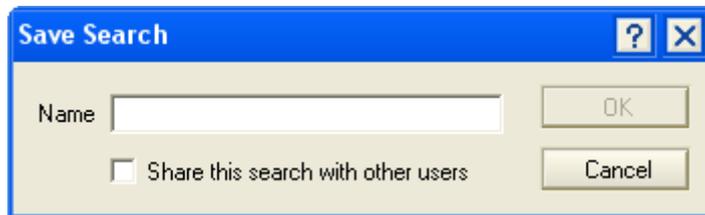


Figure 34: Save Search dialogue box

3. Name: type in a name for your search. Make it a meaningful name – so you know what the search is for.
4. Share this search with other users: Tick this box if you want other people with access to your database to be able to use this search.

### Share this search with other users

Only some people have permission to select Share this search with other users.

If you do not have permission you will get an error message "You are not authorized to perform this action."

5. Click <OK>.

## vi Using your saved searches

Saved searches must be "loaded" before you can use them.

1. Click <Load Search>.
2. A list of your searches displays.



Figure 35: List of currently saved searches - acme corporation

3. Click on the required search.
4. Enter any other criteria.
5. Click on <Search> to conduct your search.

**vii Deleting saved searches**

When you have finished with a saved search (and don't need it again) you can delete it.

1. Click on *<Load Search>*.
2. Click on *Delete Saved Search*.
3. Click on the search to be deleted.
4. Click on *<Delete>*.