

Searching in Content Manager

There are two different ways to **search** in Content Manager: by using the **Search Bar** for a quick search, or by using the **Blue Magnifying Glass**  icon under the **Search Tab** for the option of more complex searches.

Recommended search types to know:

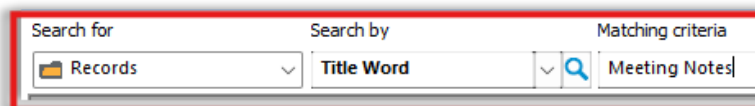
Title Word – Searches anything within the Title field

Any Word – Searches anything within the Title and Notes fields

Date Registered – Searches within set dates of when a record was added into Content Manager

All – Searches all records

Search Bar:



The screenshot shows the Search Bar interface with three main sections: 'Search for', 'Search by', and 'Matching criteria'. The 'Search for' section has a dropdown menu with 'Records' selected. The 'Search by' section has a dropdown menu with 'Title Word' selected. The 'Matching criteria' section has a text input field containing 'Meeting Notes'.

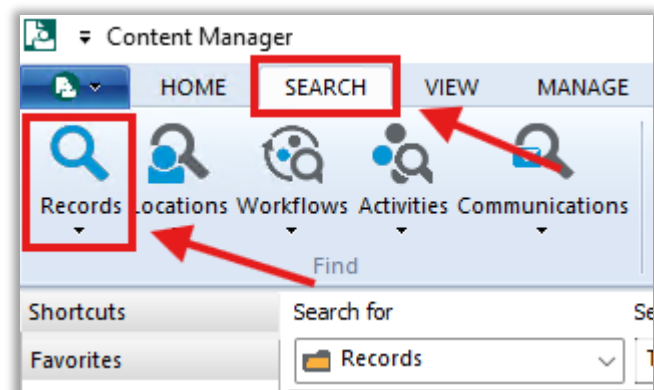
Step 1. Select what you want to **SEARCH BY**. (i.e. **Title Word**)

Step 2. Type in your **MATCHING CRITERIA**, such as a keyword or title.

Step 3. Press your **ENTER KEY**. Your search will appear in a new window.

Search Tab:

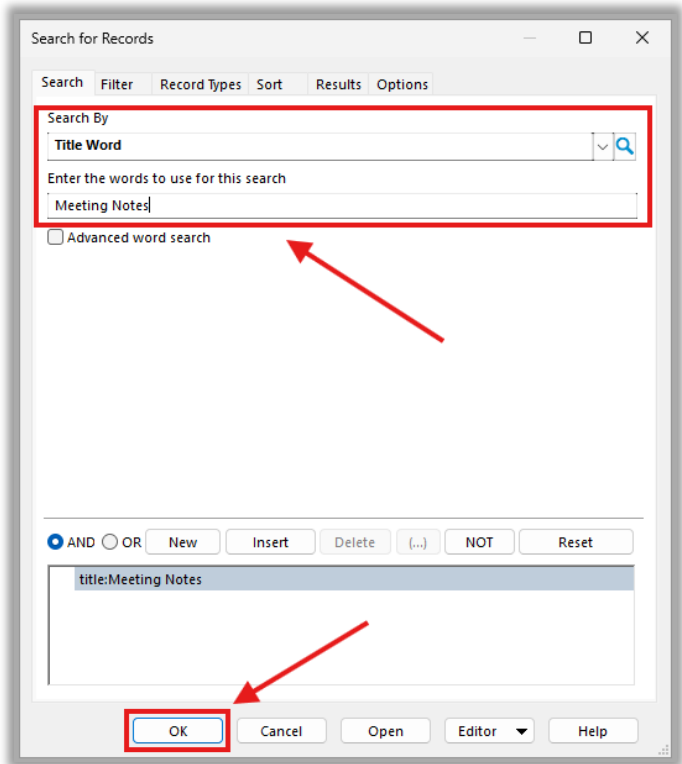
Step 1. Click on **SEARCH** tab, then click on the **RECORDS** button in the top left corner.



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Step 2. In the new window, select what you want to **SEARCH BY**, then type in any matching criteria or keywords.

Step 3. Click on the **OK** button. Your search will appear in a new window.



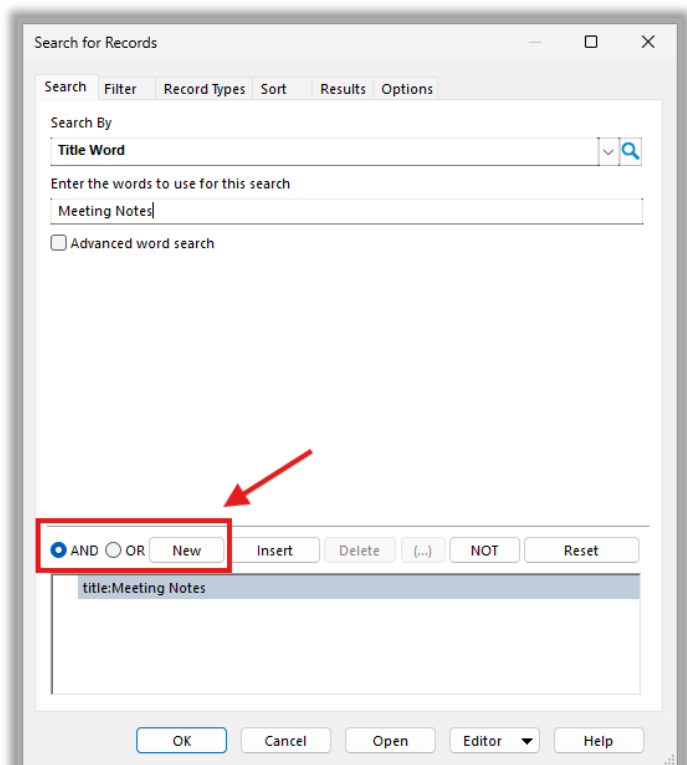
The screenshot shows the 'Search for Records' dialog box. The 'Search By' dropdown is set to 'Title Word'. The search criteria 'Meeting Notes' is entered in the text field. The 'OK' button is highlighted with a red box and an arrow.

Complex Searches:

Within the **SEARCH TAB**, you are able to combine search criteria to narrow search results.

Step 1. After selecting your first **SEARCH BY** criteria, click on the **NEW** button.

Note: You can also select the **AND** or **OR** options when adding additional searching criteria.



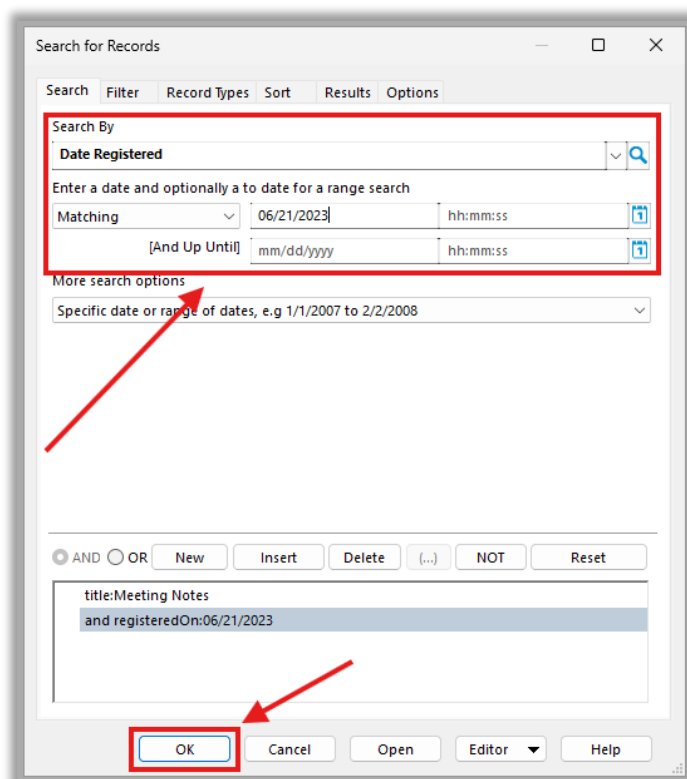
The screenshot shows the 'Search for Records' dialog box. The 'Search By' dropdown is set to 'Title Word'. The search criteria 'Meeting Notes' is entered in the text field. The 'NEW' button is highlighted with a red box and an arrow.

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Step 2. After clicking the **NEW** button, select which additional search criteria you want to add to your original **SEARCH BY.** (i.e. **Date Registered**)

Note: You can keep adding multiple search criteria to your search.

Step 3. Click on the **OK** button. Your search will appear in a new window.



USEFUL TIP: After any of your searches, you can click on the **REFINE SEARCH** button on the top of the screen. Use this option to refine any criteria or keywords with your current search, instead of creating a new search.

