

SQL Text Indexing in Content Manager

White Paper

Contents

1	SQL	. Text Indexing in Content Manager3
	1.1	Overview
	1.2	Why SQL Text Indexing
	1.3	Working with SQL Text Indexing51.3.1 Accessing the SQL Text Indexing51.3.2 Configuring the SQL Text Indexing51.3.3 Checking the SQL Text Indexing61.3.4 Reindexing the SQL Text Indexing61.3.5 Synchronizing the Stoplist91.3.6 Recreating the SQL Text indexing10
	1.4	Limitations of using SQL Text Indexing in Content Manager11
2	Sea	rch in Content Manager – Recap11
	2.1	Overview11
	2.2	Quick search using just one criterion: Search pane
	2.3	Search pane12
	2.4	Easy search using one or more criteria: Search for dialog boxes14 2.4.1 Search for dialog boxes14
	2.5	Advanced search
3	Nois	se Words20
	Abo	ut OpenText21

1 SQL Text Indexing in Content Manager

1.1 Overview

The SQL (Structured Query Language) Text Index feature allows organizations to index the Content Manager word indexes, such as Titles, Notes, text type Additional Fields, Classifications, Location Addresses, and so on, using native database indexing.

SQL Text Indexing is supported for MS SQL Server, Oracle, and PostgreSQL RDBMS and depends on the respective text indexing component of the RDBMS.

A pre-requisite for using SQL Text Indexing on MS SQL Server and Oracle is that you must have their associated 'full text' features installed and configured before upgrading or enabling SQL Text Indexing. PostgreSQL has built-in support for text searching, so no additional components are required.

For more information, see the link below from Microsoft:

https://learn.microsoft.com/en-us/sql/relational-databases/search/

1.2 Why SQL Text Indexing

In 10.1, the Content Manager text indexing engine, which has been in place for many years, is fully replaced with the SQL text indexing capabilities built into modern relational databases.

This capability was first introduced in Content Manager 10.0 as an alternative. From 10.1 onwards, SQL text indexing is the only way to index metadata.

Note that, when upgrading from a version of Content Manager 10.0 or earlier, you will need to factor in a complete text reindex into your upgrade plan. Text search methods such as Title, Notes, and Any Word searches will not be available until the SQL Text Index is created and indexed.

The two immediate advantages of SQL Text Indexing are:

- Huge performance improvement when searching for records, sorting records, grouping records, or maintaining a unique column.
- Flexibility to search records with titles that include an apostrophe (') as part of the word, and/or a comma (,) as part of the phrase.

This change requires a re-acquaintance of search parameters.

1.2.1 Title Word

This search considers all the words used as search terms in text search.

EXAMPLE:

For searching records, you can search with matching criteria as "The world is not enough", In this example, the word "not" is treated as a string. It will find records where the record title contains "The", "world", "is", "not" and "enough".



くい	Date Registered	E Record Number	Title	Date Created	Source Type	Document Is Missing	Extension	
	10/03/2023 at 04:54:11	D23/35	The world is not enough	10/03/2023 at 04:54:06	Record has no document attached.	No		
	12/03/2023 at 05:56:59	D23/36	The world is not enough	12/03/2023 at 05:56:52	Record has no document attached.	No		
	03/07/2023 at 00:39:34	D23/8849	The world is not enough	03/07/2023 at 00:39:33	🕅 Record has no document attached.	No	0	
	08/02/2024 at 02:54:47	D24/7	The world is not enough	08/02/2024 at 02:54:27	Record has no document attached.	No	C	
								-
	T EROLI TERECORD	TH MOLOCE WHERE	WHITE FOR SOT WE EROLA TOTATIONAT WHEE	RECONTINUE (and APTHE AND SHOP	D'AND TO AND NOT AND TROUGHT IN			DED EX Late
SELE	CI UN PROM TSRECORD W	ITH (NOLOCK) WHERE (uning select un PROMISIATIOART WHEP	RE CONTAINS (Text, N THE AND WORL	ID AND IS AND NOT AND ENOUGH , DA	AGOAGE 0)) AND ICDateRecyc	ied is note and on a c) or	WER DI LILIE

1.2.2 Title Word (Advanced)

You can search for records with titles that include an apostrophe (') as part of the word, and/or a comma (,) as part of the phrase. For example, what's happened, has happened! The Title Word (Advanced) search treats AND, OR, NOT, NEAR, and parentheses as keywords except if they are enclosed within the double quotes. The full-text query is formed by treating those keywords as logic operators.

NOTE: If you are using logical operators (E.g., AND, OR, NOT, or NEAR) in the search criteria, it is **recommended** to use Advanced word searching.

EXAMPLE:

For searching records, you can search with matching criteria such as "The world is not enough". In this example, the word **not** is treated as a logical operator. The search will find records where the record title contains "The", "world" and, "is" and does not contain "enough".

earch for S	earch by	Matching criteria					1780
Records V	The word(Advanced)						Ĭ, ∎o
Records - titleAdv:The world	is enough - 1 X						
📫 Records - titleAdv:The worl	d is enough - 1						
🗸 🚔 Date Registered	E Record Number	Title	Date Created	Source Type	Document Is Missing	Extension	
b 05/07/2023 at 23:46:47	D23/8863	The world is	05/07/2023 at 23:46:35	Record has no document attached.	No	1	
ataset							
2:58:19:618 SELECT uri FROM TSI	ECORD WITH (NOLOCK)	WHERE (uri IN (SELECT uri FROM TSTXTIDXRT WHERE CO	ONTAINS (text , N"THE" AN	D "WORLD" AND "IS" AND NOT "ENOUGH" , LAN	GUAGE 0)) AND rcDateRecy	cled IS NULL AND uri >	0) ORDER BY title ASC

1.2.3 Advanced Word Search

NOTE: This feature is available only from Content Manager 23.3.

This option is only available for all word searches and available for selection only in the binary search editor. When selected, the search parser decodes and identifies all the logic keywords, e.g., **OR**, **AND**, **NEAR**, and **NOT**, and uses them as logic operators in text search, otherwise, all the words are used as search terms in text search.

1.3 Working with SQL Text Indexing

1.3.1 Accessing the SQL Text Indexing

To access the SQL Text Indexing options:

- 1. Expand Datasets in Content Manager Enterprise Studio.
- 2. Right-click the dataset you want to work with and point to **SQL Text Indexing**. The available options are:
 - Recreate
 - Check
 - Reindex
 - Synchronize Stoplist
 - Recreate indexes.

1.3.2 Configuring the SQL Text Indexing

- 1. Expand Datasets.
- 2. Right-click the dataset you want to work with point to SQL Text Indexing and click **Recreate**. The Configuring SQL Text Indexing dialog is displayed.

Neutral	~			
Dutch English French	garçon and garcon a	identical word	s)	
Neutral	Synchronization Type		Interval(Mins)	
tecord Titles	On Commit	~	5	*
ecord Notes	On Commit		5	*
lassifications	On Commit	\sim	5	A
chedules	On Commit	~	5	*
hesaurus Terms	On Commit	\sim	5	A
ocation Addresses	On Commit	\sim	5	*
ommunication Addresses	On Commit		5	4 ¥
rchiving Events	On Commit	~	5	*
Vorkflaws	On Commit		5	A. V
ctivities	On Commit	\sim	5	A
ext Additional Fields	On Commit	~	5	* *
bject Notes	On Commit	\sim	5	A T

NOTE: The SQL Text Indexing dialog is also displayed as a part of the new dataset creation process; as well as when the SQL Text Index is re-created via the right-click SQL Text Indexing - Create option.

- a) Word breaker language by default this is set to **Neutral**. Select the word breaker language from the drop-down. The available languages are **Dutch**, **English**, **French**, and **German**.
- b) If you wish to ignore the accents on characters so all words are indexed as the same words, select **Ignore accents on characters (treats garçon and garcon as identical words).**
- c) For Oracle datasets only, the options Parallel Degree and the Word Type -Synchronization Types are available.
- **Parallel Degree** by default this is set to 4 set the number of parallel execution servers associated with a single operation. This can be set up to 99.
- Word Type Synchronization Types from the drop-down list, select the Synchronization Type, select from:
 - On Commit select this option to synchronize the indexes at the point of creation of the object.
 - **On Regular interval** select this option to synchronize the indexes at regular intervals. The interval period is set in the **Interval (Mins)** option.
- 3. Click OK.

NOTE: When upgrading to SQL Text indexing it is necessary to run a Reindex to ensure all existing supported records/objects can be searched for using text search methods.

1.3.3 Checking the SQL Text Indexing

- 1. Expand Datasets.
- 2. Right-click the dataset you want to work with and point to SQL Text Indexing and click Check.



Content Manager will run a check to determine that all the required schema elements are available. If issues are found, a warning to repair the index will be displayed.

NOTE: Content Manager will display SQL Text Index is partially created against the Dataset name on the Enterprise Studio home page. This will indicate that a Check and repair is required. Once the repair has been completed, a re-index is required.

1.3.4 Reindexing the SQL Text Indexing

When a new SQL Text Index is created, or there has been ingestion of objects into the Content Manager dataset, it is necessary to reindex the dataset, so the objects are searchable.

1. Expand Datasets.

- 2. Right-click the dataset you want to work with and point to SQL Text Indexing and click **Reindex**. The SQL Text Reindexing Tool dialog is displayed.
- 3. In the Select Word Types tab, select the objects to be reindexed.

elect Word Types Configure Text Indexes	Options		
Record Titles			
✓ Record Notes			
Record Additional Fields		Select	
From:	To:		
Not Indexed Records			_
	S	how Not Indexed Records	
✓ Classifications			_
✓ Schedules			
Thesaurus Terms			
Communication Addresses			
✓ Location Addresses			
✓ Archiving Events			
✓ Workflows			
 Activities 			
✓ Locations			
Additional Fields for other objects		Select	
✓ Notes for other objects		Select	
Select all			
Juice and			
	ОК	Cancel	Help
	OK	Conter	. note

4. In the Configuring SQL Text Indexing tab, select the required options.

Word breaker language	~			ł
Ignore accents on characters	(treats garçon and garcon a	s identical words)		
Parallel Degree				
	4 🔺			
Word Type	Synchronization Type	lr	nterval (Mins)	
Record Titles	On Commit	~	5 🜲	
Record Notes	On Commit	~	5 🔹	
Classifications	On Commit	~	5	
Schedules	On Commit	~	5	
Thesaurus Terms	On Commit	~	5	
Location Addresses	On Commit	~	5	
Communication Addresses	On Commit	~	5	
Archiving Events	On Commit	~	5	
Workflows	On Commit	~	5	
Activities	On Commit	~	5	
Text Additional Fields	On Commit	~	5	
Object Notes	On Commit	~	5	
	OK	Cancel	Help	

5. In the **Options** tab, select the required options:

SQL Text Reindexing Tool - CMDB_234_58	×
Select Word Types Configure Text Indexes Options	
Limit how many rows can be updated at any one time	
Use CTAS approach when rows to reindex exceeds:	
Use single thread per word type	
Insert notes in chunks	
By default notes are processed using procedural SQL, which consumes more resources in the database engine	
OK Cancel	Help

- Limit how many rows can be updated at any one time select this option to limit the number of rows that are processed at one time and execute the operation in batches. This option may be of use when reindexing large datasets. Set the maximum number of rows to update at any one time. If the reindexing processes are timing out, reduce this number.
- Use CTAS approach when rows to reindex exceeds option to reindex using CTAS approach that has better performance than the default one.
- Use single thread per word type if checked, the re-indexing process runs in parallel using a single thread per word type.
- **Insert notes in chunks** if checked, the notes and text of additional fields are copied using the Insert or Update command in chunks.

6. Click OK to run the reindex. The Dataset Work in Progress dialog will be displayed.

Current step	St	tatus		
Initialization	Read	y to start		
use after	Othersterre			
use after ◯ Each Step) Major Steps	Com	plete All Steps	

- 7. Select the Pause After option you want to apply:
 - Each Step pause after each step is completed.
 - Major Steps pause after each major step is completed.
 - Complete All Steps complete all steps without pausing.
- 8. Click Start to start the upgrade process.
- 9. Once all steps are completed, click **Done** to close the **Dataset Work in Progress** dialog. If required, click **View Log** to view the generated log file.

Current Step		Status		^
11 of 14: Activities (major)		Stage 11: Com		
12 of 14: Locations (major)		Stage 12: Com		
13 of 14: Object Notes (majo	ır)	Stage 13: Com		- 14
14 of 14: Processing completed on 02/21/202	te, performing final cle 4 at 3:20 PM Processing	Stage 14: Com		Y
¹ 14 of 14: Processing complet age 14: Completed on 02/21/202 'ause after	e, performing final cle 4 at 3.20 PM Processing	Stage 14: Com		×
14 of 14: Processing complet age 14: Completed on 02/21/202 Pause after Case after	e, performing final cle 4 at 3 20 PM Processing () Major Steps	Stage 14: Com complete. © Cc	mplete All Steps	v

1.3.5 Synchronizing the Stoplist

Select this option to synchronize the SQL Text custom stoplist with the Content Manager noise words. (For information about noise words, see section **NOISE WORDS**)

NOTE: If using PostgreSQL, the trimstopword PostgreSQL stop word file must be located in the PostgreSQL\share\tsearch_data folder before running the Stoplist synchronization.

1.3.6 Recreating the SQL Text indexing

Select this option to recreate SQL Text indexes.

- 1. Expand Datasets.
- 2. Right-click the dataset you want to work with and point to SQL Text Indexing and click **Recreate indexes**. The Recreating SQL Text indexes dialog is displayed.

ecreating SQL Text Indexes				×
Recreate Text Indexes Configure Text Ind	lexes			_
Select indexes to recreate				
Record Titles				- 11
Record Notes				- 11
Classifications				- 11
Schedules				
Thesaurus Terms				
Location Addresses				- 11
Communication Addresses				- 11
Archiving Events				- 11
Workflows				- 11
Activities				- 11
Text Additional Fields				- 11
Object Notes				
				- 11
Select All				
				- 11
	OK	Cancel	Help	

- 3. Select one or more checkboxes or click **Select All** to select indexes to recreate. The following are the options:
 - Record Titles
 - Records Notes
 - Classifications
 - Schedules
 - Thesaurus Terms
 - Location Addresses
 - Communication Addresses
 - Archiving Events
 - Workflows
 - Activities
 - Text Additional Fields
- 4. In the Configuring SQL Text Indexing tab, select the required options.

ecreate Text Indexes Configure	Text Indexes				
Word breaker language					
Neutral	\sim				
Ignore accents on characters	(treats garçon and garcon	as identical wo	ords)		
Parallel Degree					
	4 -				
Word Type	Synchronization Typ	2	Interva	il(Mins)	
Record Titles	On Commit	~		5	
Record Notes	On Commit	\sim		5	k.
Classifications	On Commit	\sim		5	•
Schedules	On Commit	\sim		5	-
Thesaurus Terms	On Commit	\sim		5	•
Location Addresses	On Commit	\sim		5	r -
Communication Addresses	On Commit	\sim		5	r
Archiving Events	On Commit	\sim		5 🗧	r
Workflows	On Commit	\sim		5	r
Activities	On Commit	\sim		5	r
Text Additional Fields	On Commit	\sim		5	r
Dbject Notes	On Commit	\sim		5	r
	ОК	Cancel		Help	

5. Click OK.

1.4 Limitations of using SQL Text Indexing in Content Manager

In SQL Text Indexing, the text/string (E.g., AND, OR, NOT, and NEAR) are treated as logical operators. For the existing Content Manager users, this was a major behavioral change. These reserved SQL keywords are used as pure strings, resulting in a mismatch of expected records.

To mitigate this, we introduced a new search option "Title Word (Advanced)" that honors the reserved keywords in SQL. To retain the user experience, we changed the "Title Word" search method to treat the reserved SQL keywords as pure strings.

2 Search in Content Manager – Recap

2.1 Overview

You can search for Content Manager items using practically all the information about them that is saved in Content Manager. There are search methods that are quick and simple and others that may

take a little longer to set up but enable you to combine criteria in a more sophisticated manner. The information below helps how to search in Content Manager.

2.2 Quick search using just one criterion: Search pane

In the main Content Manager window under the toolbars, use the fields **Search For**, **Search By**, **Matching Criteria**, and click the **Run the search** button.

2.3 Search pane

opentext

Use the **Search** pane to perform fast and simple searches.

By default, it is visible and appears in your search toolbar at the top of your Content Manager window.

Date Created	Kecord Number	11De						×.,
Records	 Date Registered 	∨ Q today						^ ⊮ ⊡ σ
Search for	Search by	Metching criteria						
Reco	rds		Security	Archiving	Physical	Workflow	Other	

You can hide it or show it if it is not visible using the View menu command Search Pane.

The **Search** pane works much like a search using the **Search** menu; however, you can only search by one field.

The Search pane has these fields and buttons:

 Search For - to select the type of Content Manager item you are looking for, for example, records or Locations.

It depends on your permissions and which type of objects you can search for.

 Search By - to select the data or field to search by, for example, Document Content for document content, or Date Created.

You can type the caption or field name, or the search method in the field. Click the **Down** arrow to the right of the field for the most recent data you searched by, favorites, and all terms alphabetically sorted. Separators are added to differentiate between recent data, favorites, and all terms.

Click the search button to the right of the arrow for the full list of methods you can use to search Content Manager in the **Search Methods** dialog box.

- Matching criteria to enter the data to find, like a word, a date, or a Location.
- Buttons to the right of the Matching criteria field:
 - More options for entering the search value button displays the Search Parameters dialog box for more search options.

Matching	\sim	Today	h	h:mm:ss	[]	
	[And Up Until]	mm/dd/yyyy	h	h:mm:ss	[7]	
More search o	ptions					
Specific date o	r range of date	s. e.a 1/1/2007 to 2/	/2/2008		~	

• Select date from calendar button - available when you select a date field in the Search By field - to select a date from a calendar, rather than typing it.

Sun Mon Tue Wed Thu Fri Sat 28 29 30 31 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 7 28 28 12 2
28 29 30 31 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 1 2
4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 1 2
11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 1 2
18 19 20 21 22 23 24 25 26 27 28 29 1 2
25 26 27 28 29 1 2
3 4 5 6 7 8 9 Today: 2/21/2024
More Dates ~
OK Cancel

• **Check box** - available when you select a Boolean field in the **Search By** field - selected indicates YES and unselected indicates NO for the Boolean operator.



• Run the search button - click to execute the search and display the result.

2.4 Easy search using one or more criteria: Search for ... dialog boxes

Use the **Search** pane to perform fast and simple searches.

2.4.1 Search for ... dialog boxes

The Search for ... dialog boxes appear when you search for items in Content Manager.

This may be when you use the **Search** menu on the toolbar, or when you right-click a list and on the **Search** menu, click **Refine Search**, for example.

earch	Filter	Record Ty	mes Sort	Results	Ontions			
	1 11001	necord I)	pes sore	incounty.	options			
Search	Ву							_
Title	(Free Tex	tt Part)					~	~ Q
Choose	e operato	r and enter	string value	to search fo	r			
Match	ing	~	E*				`	~ Q
More s	earch opt	tions						
More s	earch opt	tions possibly usi	ing wildcards	or comparis	on operat	tor, e.g. >=n	ed, invo*	~
More s A sing	earch opt le string,	tions possibly usi	ing wildcards	or comparis	on operat	tor, e.g. >=n	ed, invo*	~
More s A sing	earch opt	tions possibly usi	ng wildcards	or comparis	on operat	tor, e.g. >=n	ed, invo*	~
More s A sing	earch op! le string,	tions possibly usi	ng wildcards	or comparis	on operal	tor, e.g. >=n	ed, invo*	~
More s A sing	earch opf	tions possibly usi	ng wildcards	or comparis	on operat	tor, e.g. >=n	ed, invo*	~
More s A sing	earch opf	tions possibly usi	ing wildcards	or comparis	on operat	tor, e.g. >=n	ed, invo*	~
More s	earch opt	tions possibly usi	ing wildcards	or comparis	on operal	tor, e.g. >=n	ed, invo*	~
More s A sing	earch opf	tions possibly usi	ng wildcards	or comparis	on operat	tor, e.g. >=n	ed, invo*	~
More s A sing	earch opf le string,	tions possibly usi	ng wildcards Insert	or comparis	on operat	tor, e.g. >=n NOT	ed, invo* Reset	~
More s A sing	earch opt le string,	tions possibly usi New	ng wildcards Insert	or comparis	on operat	NOT	ed, invo* Reset	~
More s A sing	earch opti le string,	tions possibly usi New	ng wildcards Insert	or comparis	on operat	tor, e.g. >=r	ed, invo* Reset	~
More s A sing	earch opt le string, C O R pedTitle:E	tions possibly usi New	ng wildcards	or comparis	on operat	NOT	ed, invo* Reset	~
More s A sing	earch opi le string,	tions possibly usi New	ng wildcards	or comparis	on operat	NOT	ed, invo* Reset	~
More s A sing	earch opi le string,	tions possibly usi New	ng wildcards Insert	or comparis	on operat	NOT	ed, invo* Reset	~
More s A sing	earch opi le string,	tions possibly usi New	ng wildcards	or comparis	on operat	NOT	ed, invo* Reset	~
More s A sing A sing ANE	earch opi le string,	tions possibly usi New	ng wildcards	or comparis	on operat	NOT	ed, invo* Reset	~
More s A sing ANE	earch opt le string,	tions possibly usi New	ng wildcards	or comparis	on operat	NOT	ed, invo* Reset	~
More s A sing ANE ty	earch opf le string,	tions possibly usi New	ng wildcards	or comparis	on operat	NOT	ed, invo* Reset	~
More s A sing ANE ty	earch opf le string,	ions possibly usi New *	ing wildcards	or comparis	()	NOT	ed, invo* Reset Help	~

The **Search for** ... dialog box layout and fields depend on the type of Content Manager item you are looking for, and the search editor you are using. You can quickly change the search editor you are using with the button **Editor** at the bottom.

		3						~
earch	Filter	Record Types	s Sort	Results	Options			
Search	Ву							
Title	(Free Tex	t Part)					~	Q
Choose	e operator	r and enter stri	ng value t	o search fo	r			_
Match	ing	~	E*				~	Q
A sing	earch opt le string, j	ions possibly using t	wildcards o	or comparis	son operat	tor, e.g. >=re	ed, invo*	~
A sing	earch opt le string, j	ions boossibly using r	wildcards o	or comparis	son operat	tor, e.g. >=re	ed, invo* Reset	¥
A sing A sing A sing	earch opt le string, p O O R pedTitle:E	New	wildcards o	or comparis	son operat	tor, e.g. ≻=re NOT	ed, invo* Reset	~
A sing A sing A sing	earch opt le string, p c O R pedTitle:E	New Control	wildcards o	Delete	son operat	NOT	kd, invo* Reset	~

To sort the search results in a particular order and to customize the columns for the search results, use the **Sort**, **Filter**, and **Results** tabs and choose how to present the list.

Use the view pane's right-click menu and select **Customize** to configure Content Manager so that the information you want to see for each item is listed.



If necessary, to refine your search, right-click in the list of search results, and on the **Search** menu, click **Refine Search**.

2.5 Advanced search

Using the string search editor, you can use the full capabilities of **Content Manager** searching, combining potentially large numbers of criteria, and using advanced filter and sort options.

The string-based search editor enables you to use search strings to take full advantage of Content Manager's advanced search capabilities.

You can use it to search for any item in Content Manager that you can search for.

1. On the **Search** menu, click what you are searching for, for example, **Find Records** to find records or **Find Locations** to find Locations.



- 2. If it is not set, use the button **Editor** at the bottom and select **String** to use the string search editor.
- 3. In the Search tab, use the field Enter search string to build your search.

You can type your search clauses manually or use Kwik Select to select them and string them together.

- a) Click Kwik Select and the Search Methods dialog box appears.
 - By Category displays the search methods in categories
 - By Format displays the search methods by their data format
 - Alphabetical displays the search methods in alphabetical order.

By Category	O By Format		phabetical	
Method Name	Caption		Category	
> 🚖 Favorites				
Recently Used	Met			
> <u>Aa</u> Name				
<u>ab</u> Type				
Linked Navigat	tion			
Trays and Labe	els			
> (ii) Reference and	Cont			
Dates and Tim	es			
Retention and	Disp			
Sontacts, Peop	ole an			
Records Mana	gem			
Security and A	udit			
> 🔍 Other				
<				>
				\sim
				\sim
	OK	Cancel	Help	

Select a search method and review the text below the list to find out more about it.

You can use the tabs to define your search further:

• Filter tab - Use the Filter tab on a Search dialog box to filter the search results.

 ✓ E Active ✓ Inactive ✓ Archie ✓ Destre ✓ Archie ✓ Archie 	e ved (Keep Foreve oyed ved (Custody Tra	r) nsferred)	J J J J J J J J J J	Vital Corporate Workgroup Personal Reference Temporary		
Records with Unfinalized File Types (ent	Date Registered	Within pes separati	ed by '?)	×	Days	
Within anothe	er Saved Search					
Set as defa	ult filters for sea	rches for rei	tords			

• **Record Types** tab - When searching for records, you can use the Record Types tab to filter your search results by the Record Types the records are using.

∠ Usi	default fi	iters for searche	s for reco	rds			
	Parco	rd Turne			 	 	- 11
	Dogu	ment					
1	File F	older					
4	🗂 Publi	ation File Folde					
1	Resea	irch Project File					
1	Elaus	e/Paragraph					
1	iii Stand	lard Document					
		la filtana fan an					
	er as defa	iuit filters for se	ircnes for	records			

• **Sort** tab - In the Sort tab on a Search dialog box, use the following options to sort a search result list.

arch	Filter	Record Types	Sort	Results	Option	IS			
Use	default s	ort order for sea	arches fo	r records					
							Der	and in a	
1						~	Des	bending	
2						\sim	Des	cending	
3						~	Des	cending	
	Jse alpha	betical order for	object s	orting					
	Set as def	ault sort order fr	or search	es for reco	ďs				
<u> </u>	iet as defi	ault sort order fe	or search	es for record	ďs				
2	Set as defi	sult sort order fo	or search	See for record	rds	Editor	-	Help	

• **Results** tab - You can use it to choose the columns that Content Manager should use when displaying search results.

arch	Filter	Record Types	Sort	Results	Options			
21100	the defau	it column cotur	for th	is Contont M	anager object			
Juse	the delad	in column setup		is content w	anager object			
deliev	le Columr	15			Displayed Q	Columns		
A <mark>a</mark> so	urce Type		^		Record	Type		
🔁 Ac	cession N	umber			🚺 Date C	reated		
💁 Ad	dressee				necord	I Number		
Aa Ali	contacts				Aa Title			
Alt	ernative o	container						
🐴 As	signee							
As	signee Sta	itus						
as Au	thor							
Au	thorizatio	n Method		A00 ->				
AU AU	to Kenditi	ions iestion Confid		<- Remove				
- Ra	tic Motod	ata Only	11					
Аавс	C contact	s only						
By	pass recor	rd type Access						
Aaco	contacts							
💁 Ch	ecked In I	Ву						
🚺 Ch	ecked In (Dn						
🖸 Ch	ecked Ou	t On						
💁 Ch	ecked Ou	t To						
Ch	ecked Ou	t Type	~					
- Ch く	erkerl Ou	+?						
								_
					Up	C	Down	
	OK	Cont		0		-	11-1-	
	UK	Cancel		Open	Editor	•	Help	

• **Options** tab - When you enter your criteria for a search, one of the tabs available to you is Options.

arch fo	r Records	5							×
earch	Filter	Record Types	Sort	Results	Options				
When	searching	by assignee:							
	Include a	person's positio	n						
When	searching	for items assign	ed to you	J.					
	Include all	locations that y	vou belon	g to					
	Include all	locations that h	nave dele	gated to ye	DU				
Search	optimizer								
	Convert C	R operators to	form a SC	QL UNION					
	Use a tem	porary table for	security	filtering					
Result	post proce	essing method							
No	Post prod	essing							\sim
When	searching	for records usin	g the def	ault metho	d:				
\checkmark	Include m	atching record r	numbers						
\checkmark	Include m	atches in record	titles						
	Include m	atches in record	notes						
	Include m	atches in record	content						
🗌 Sav	e as defau	It options					Get De	fault	
	OK	Cancel		Open	Edit	or 🔻		Help	
-	_		_						100

4. Click OK and Content Manager displays the search result.

3 Noise Words

This is a list of words that will not be indexed if they are used in record titles, notes, Thesaurus terms, and Categories.

Noise words ensure that your search lists will not be cluttered with unhelpful or forbidden terms and preserve the speed of retrieval of indexed records.

Common noise words:

- about
- and
- of
- that
- the

You can add as many of your own words as you want to the noise word list.





About OpenText

OpenText enables the digital world, creating a better way for organizations to work with information, on-premises or in the cloud. For more information about OpenText (NASDAQ/TSX: OTEX), visit <u>opentext.com</u>.

Connect with us:

OpenText CEO Mark Barrenechea's blog
Twitter | LinkedIn

Feedback

If you have feedback or queries about this document, connect with Content Manager Support.