






Table of Contents

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Introduction



The [RecFind 6](#) Metadata search is the 'middle' search in RecFind 6. By this I mean that it is the second easiest to use (after the Text search) and the second most powerful (after the Boolean search).

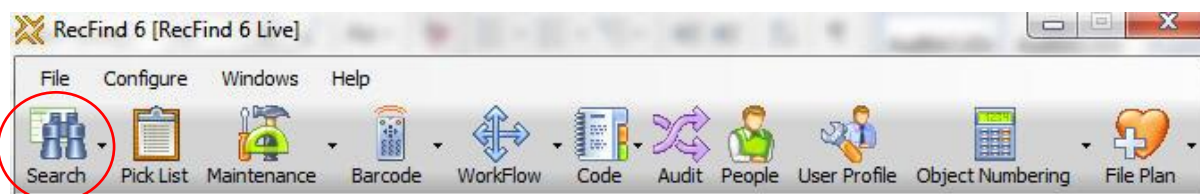
It has far more options than the Text search and its features allow you to drill down to almost any level and enter any amount of search criteria to find exactly what you are looking for. A great feature is that once you get your Metadata search working exactly as you want it to, you can save it and re-use it as and when needed. You can also refine your results by running another Metadata search on the results set of a previous Metadata search.

I doubt that there is anything in the RecFind 6 database you cannot quickly and easily find with the Metadata search.

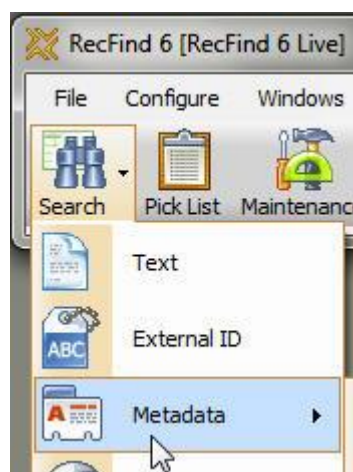
Note: The RecFind 6 main toolbar and screens and menus you see on your RecFind 6 system will be as configured for you by your RecFind administrator. You may not see the same buttons, menus, icons, colours, captions, columns, fields and language you see below in our examples. This is because RecFind 6 can be configured and 'personalised' for each class of user, changing almost anything. You may have to ask your RecFind 6 administrator to give you access to the RecFind 6 'test' system to test out the capabilities of the Metadata search as demonstrated below.

Where to find it

Starting with the RecFind 6 main toolbar



Click on the Search button and then select Metadata

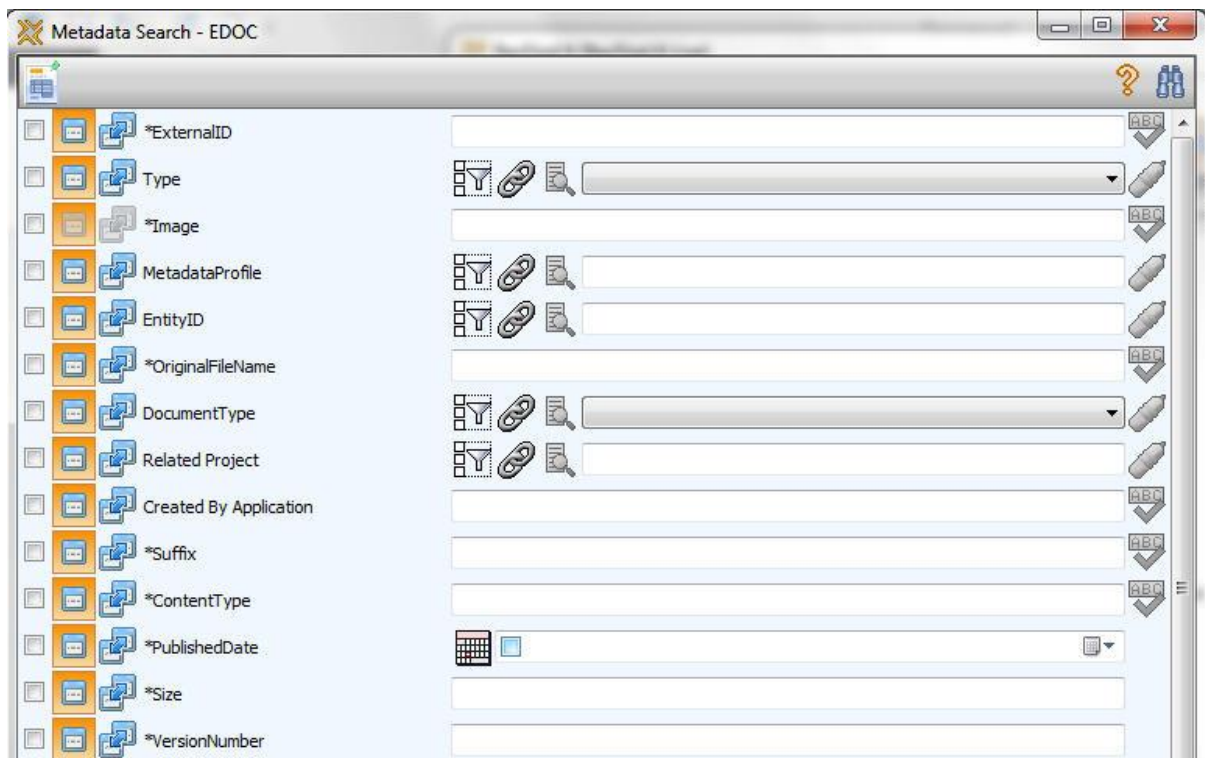


In this example, we then select Attachment (The EDOC table) to search for electronic documents and emails. You can of course use the Metadata search to search any RecFind 6 table.



What it looks like

The following screen shot is an extract from our production system, set up and configured for our use. As mentioned above, your screen will almost certainly look different with different fields and a different order of fields. However, that won't make any difference as we will be explaining how to use the Metadata search in a generic fashion.



This is the screen where you enter your search criteria using the icons (Tools) displayed for each field. The icons are in fact tools that allow you to specify exactly what you want in each field.

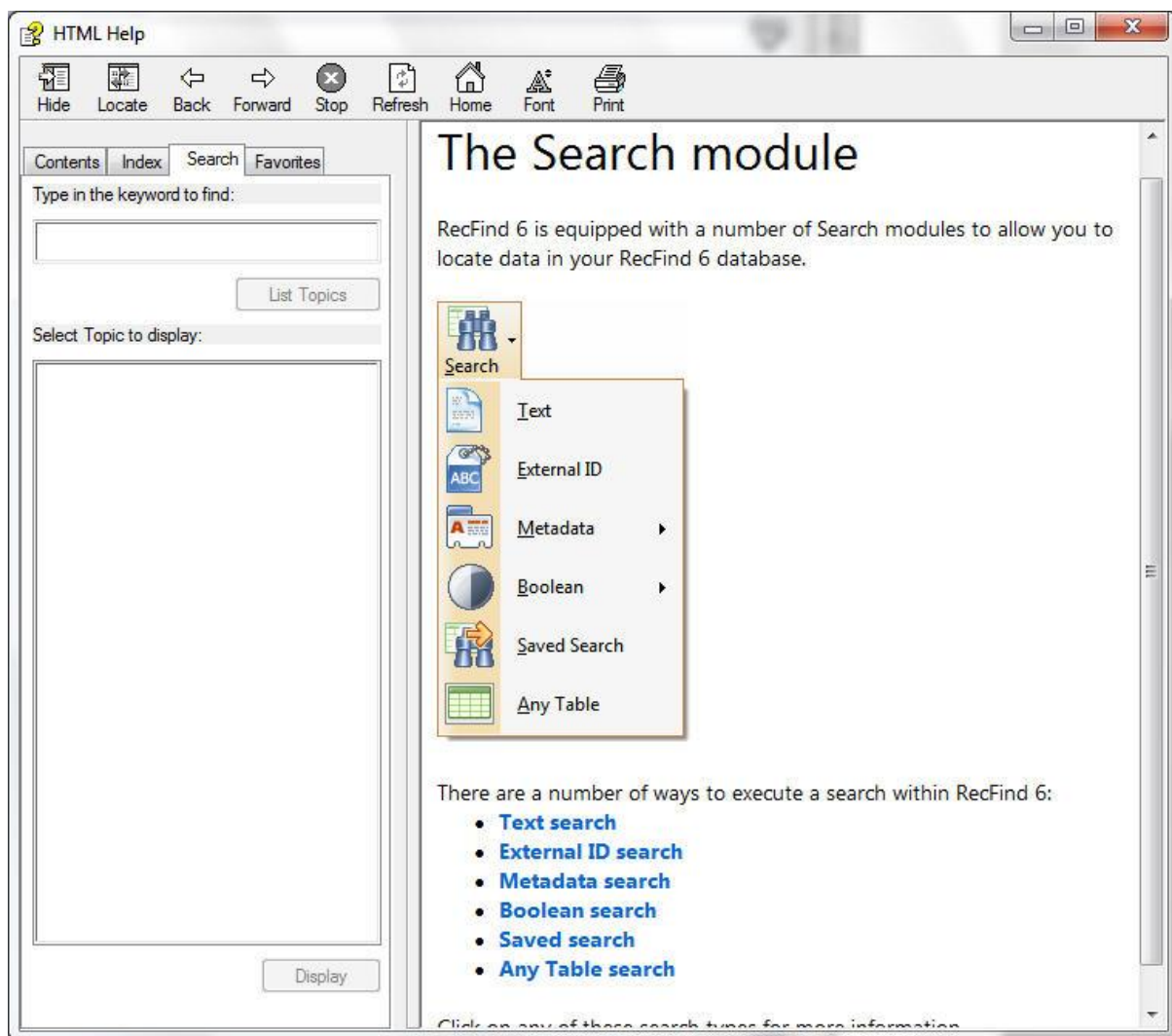
The EDOC table contains the actual electronic document (e.g., Word, PDF, TIFF, Jpeg, etc.) and its associated Metadata. The actual electronic document is stored in the *Image field.

The Help system

The following examples are necessarily concise. However, if you want a full and detailed explanation of any search, including the Metadata search, simply click on the help button at the top right of the RecFind screen, see below:

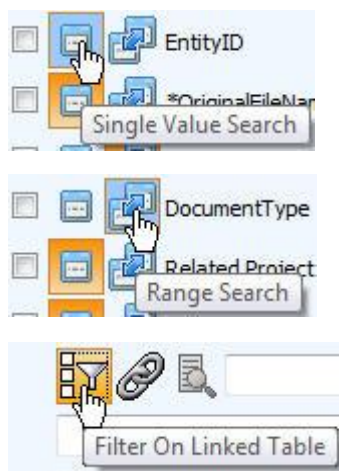


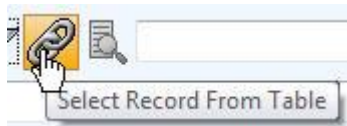
You will then be able to navigate and read the comprehensive online help system.



Tool Tips

Most of the tools have tool tips, in addition to the online help, that will appear if you hold your mouse pointer over them. For example:





What the icons (Tools) mean

The icons (tools) on the search screens are common throughout RecFind 6. Once you learn how to use them here you will be able to use them in any function and any screen in RecFind6; they always work exactly the same way.

Different field types will have different tools associated with them because of the 'nature' of the data associated with each field. Following is a brief description of the main field differences.

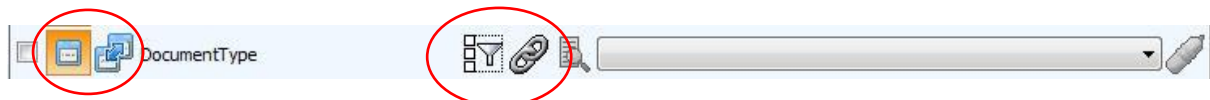
The *Image field

The *Image field is a bit special and does not have as many tools as the other fields because it is really designed so you can combine a free-text search within the Metadata search.



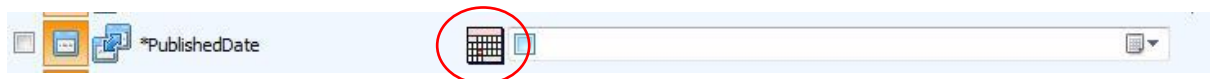
The other fields

The tools displayed depend upon the type of field but we will use the Document Type field in our example because it has most of the tools apart from the Date tool.



Date fields

The date field has a date tool so you can select your date from a calendar.



Let's explain each tool in turn.

Tool	Explanation
	This is the select, don't select and ignore tool. It has 3 values: <ul style="list-style-type: none"> Do not search on this field Do search on this field Ignore (i.e., do not find) items with this field value
	These two tools are linked, you may use one or the other <ul style="list-style-type: none"> If you select this one you may only specify a single value for this field as a search criteria. If you select this one you may then specify a range of values or a set (more than one) of values as your search criteria for this field.
	These two tools are also linked and you may use one or the other <ul style="list-style-type: none"> Filter the search by the value I select in this linked table



Only find items with this particular record selected from the linked table

How to use it

Example, find an email

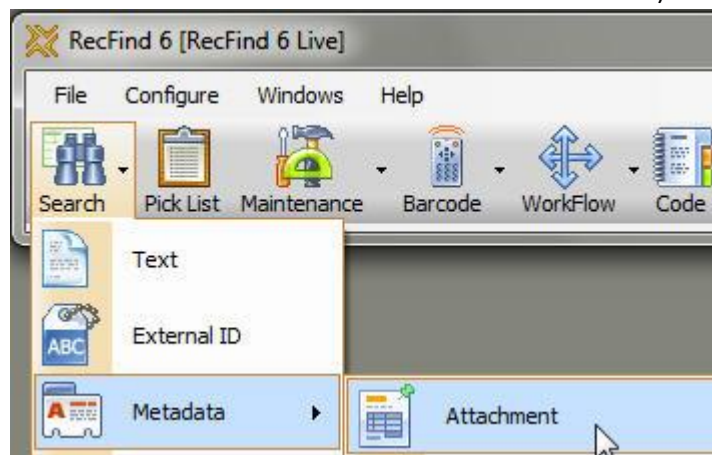
Note: We use our product [GEM](#) to automatically capture, classify and store all emails in RecFind 6. Whereas most emails are linked to the customer file (an Entity record) and can be easily browsed, there are still many that aren't to or from customers and that don't have an Entity record to link to. I find it far easier and faster to locate these emails in RecFind 6 than trying to find them in Outlook. Besides, even if it was deleted from Outlook, I will still have a copy in RecFind 6.

I can also only search in Outlook for my emails; by using RecFind 6 I can search everyone's emails (obviously, I need to belong to the RecFind 6 Administrator security group to be able to access everyone's emails).

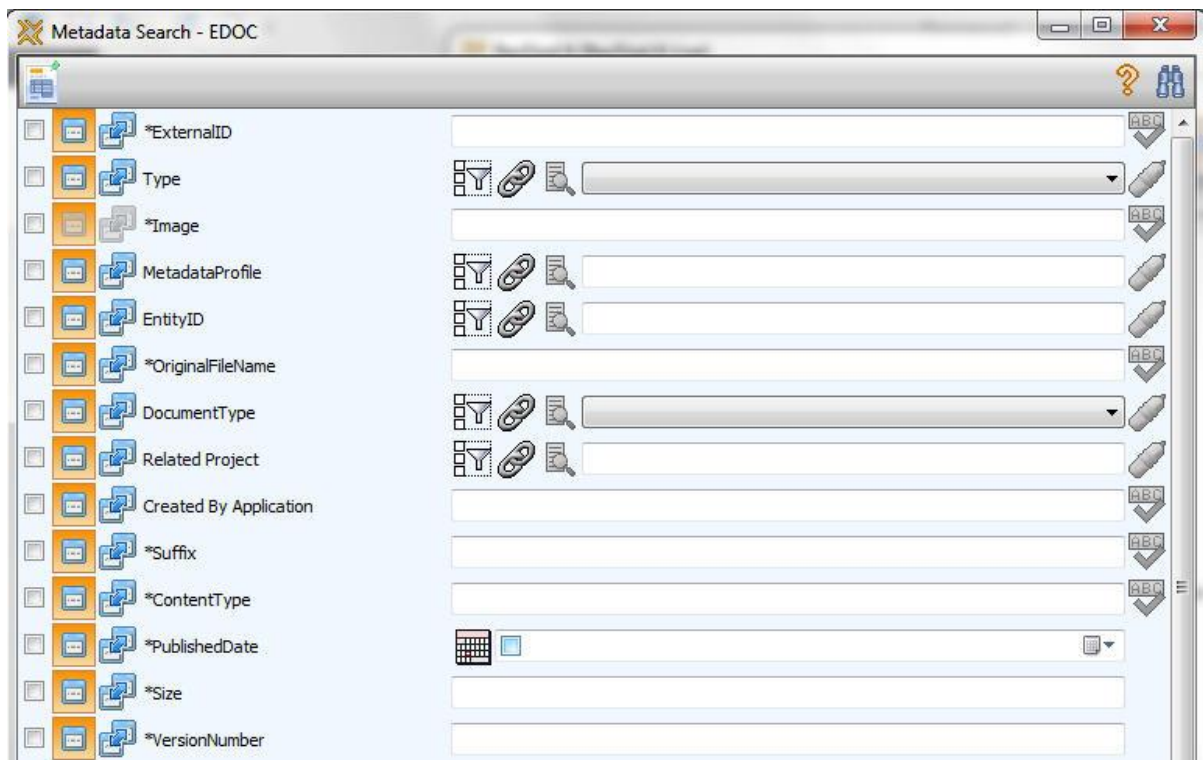
When searching for an email, I usually know who sent it and who it was sent to and I know about what time and something about the subject.

In this example I am searching for an email from a Mr O'Doherty that he says he sent to me in the first week of August.

I select Search on the main toolbar then Metadata and then Attachment (the EDOC table, used to store all emails and electronic documents in RecFind 6).

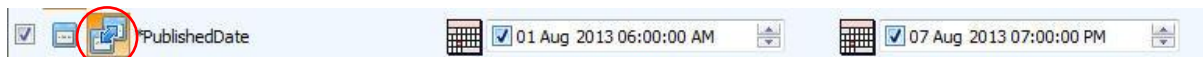


RecFind 6 displays the EDOC Metadata search screen (below) so I can enter my search criteria.



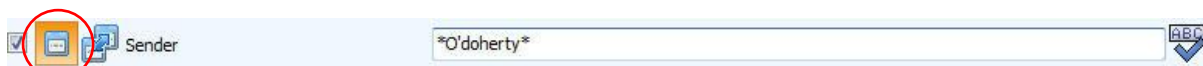
In this case I only need to enter the date range, the sender and the recipient information as my search criteria.

I use the published date (automatically populated by RecFind 6 when it captures the email), select the range tool and enter my date range to search within as follows:



The above criteria tell RecFind 6 to only find emails with a published date in the range of dates selected.

Then I enter the sender information:



The above criteria tells RecFind 6 to only find emails with "O'Doherty" in the sender field of the email.

And then finally I add me as the recipient:



The above criteria tells RecFind 6 to only find emails with "f.McKenna" in the recipient (i.e., To) field of the email.

The above 3 criteria are AND'ed together to form our search criteria so it becomes:

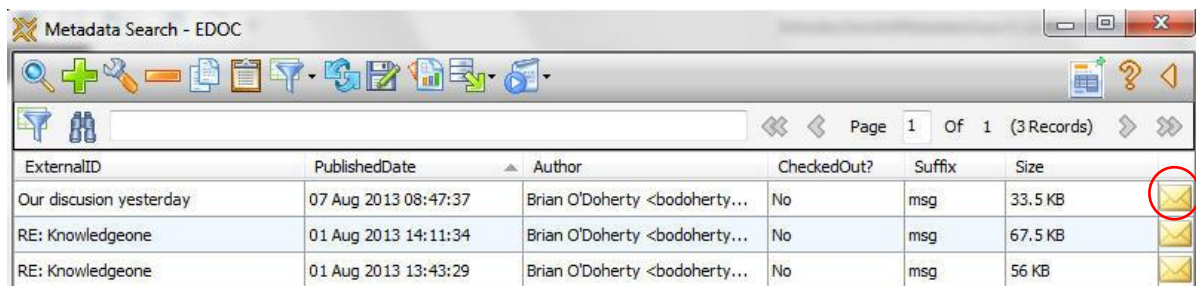
"Find any email with a Published date & time between 6:00am, 1st August, 2013 and 7:00pm, 7th of August, 2013 AND

With a sender containing "O'Doherty" AND

A recipient containing "F.McKenna".

Then I click search  in the top right hand corner of the screen.

RecFind 6 then instantly displays a result set containing all the emails that meet this search criteria.



The screenshot shows the 'Metadata Search - EDOC' window. The search bar contains 'F.McKenna'. The results table has 6 columns: ExternalID, PublishedDate, Author, CheckedOut?, Suffix, and Size. There are 3 records. The third record is highlighted, and its thumbnail icon is circled in red.

ExternalID	PublishedDate	Author	CheckedOut?	Suffix	Size
Our discussion yesterday	07 Aug 2013 08:47:37	Brian O'Doherty <bodoherty...>	No	msg	33.5 KB
RE: Knowledgeone	01 Aug 2013 14:11:34	Brian O'Doherty <bodoherty...>	No	msg	67.5 KB
RE: Knowledgeone	01 Aug 2013 13:43:29	Brian O'Doherty <bodoherty...>	No	msg	56 KB

I can then click on the thumbnail  to view any of the 3 emails found.

Using the embedded text search

I can also use the embedded text search to enhance my search criteria.

Mr. O'Doherty tells me the email was an invitation to have coffee. I therefore add to my search criteria by asking RecFind 6 to search for an email with the word "coffee" in the body of the email.

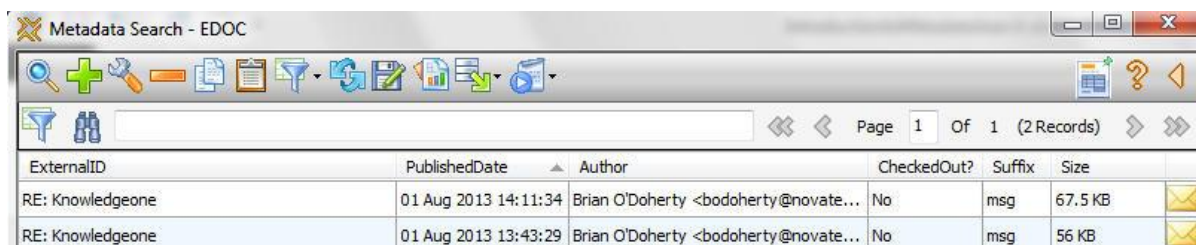


The screenshot shows the 'Embedded Text Search' interface. It has a search bar with the text 'coffee' and a 'Search' button.

Now RecFind 6 will find any email that:

- Has the word "coffee" in the body text AND
- Is dated between August 1 and August 7 AND
- Has a sender called "O'Doherty" AND
- A recipient called "f.mckenna"

In this case it now finds only two emails because the third one did not have the word "coffee" in the body text.



The screenshot shows the 'Metadata Search - EDOC' window. The search bar contains 'coffee'. The results table has 6 columns: ExternalID, PublishedDate, Author, CheckedOut?, Suffix, and Size. There are 2 records. The second record is highlighted, and its thumbnail icon is circled in red.

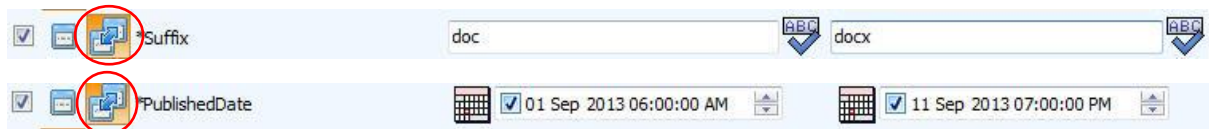
ExternalID	PublishedDate	Author	CheckedOut?	Suffix	Size
RE: Knowledgeone	01 Aug 2013 14:11:34	Brian O'Doherty <bodoherty@novate...>	No	msg	67.5 KB
RE: Knowledgeone	01 Aug 2013 13:43:29	Brian O'Doherty <bodoherty@novate...>	No	msg	56 KB

Once again I can click on the thumbnail  to view either of these found emails.

Using the Range tool to select multiple values

The Range tool behaves in one of two ways depending upon the type of field being searched. These fields are set up (configured) by your RecFind administrator in your copy of RecFind 6 so they may be different to what you see here.

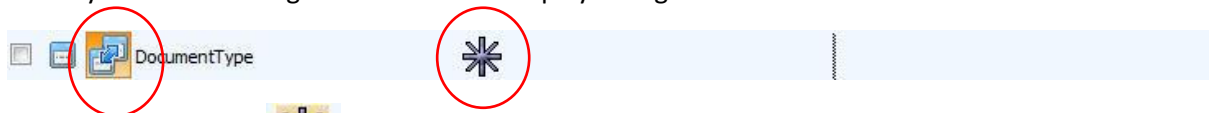
If the field is a date or value, then when you select the Range tool you will be asked to enter two values as a 'range', see examples below; one a value field and one a date field.




The first field is the 'from' field and the second is the 'to' field.

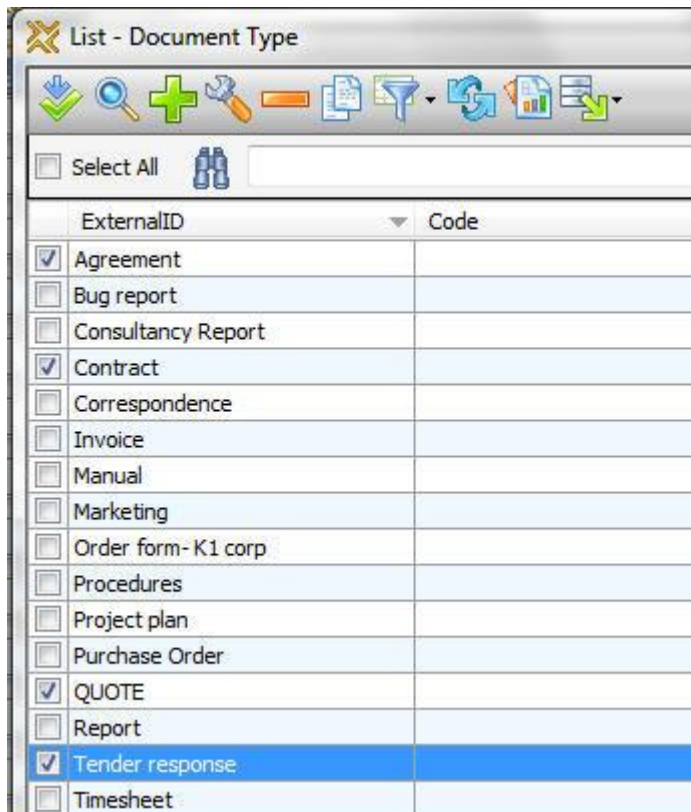
If the field is a link to another table then when you select the Range tool you will be asked to select one or more values (i.e. one or more links to the other table = one or more records in the other table) in two steps as follows.


When you click the Range tool the screen display changes as below.

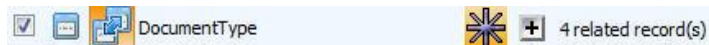


Then you click on the  icon to display a list of records to select from.

RecFind 6 displays the available records in the Document Type table for you to select from as follows.



Select the records you want to search on by ticking them and click  (Select) when ready and RecFind 6 will now include these selected items in your search criteria, see below.



These selections will be OR'ed together so that in effect we are asking RecFind 6 to find any electronic document that has a document type of **Agreement OR Contract OR Quote OR Tender Response**.

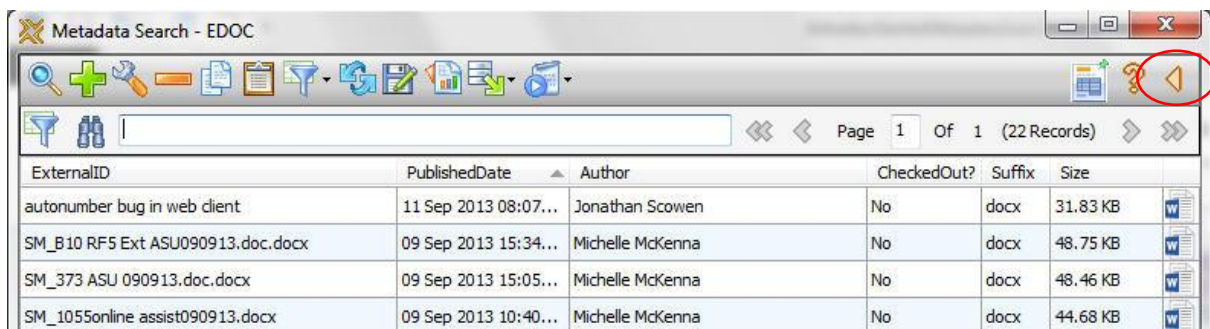
Refining your Metadata Search

There are two easy ways to refine the results of your Metadata search.

Back Button



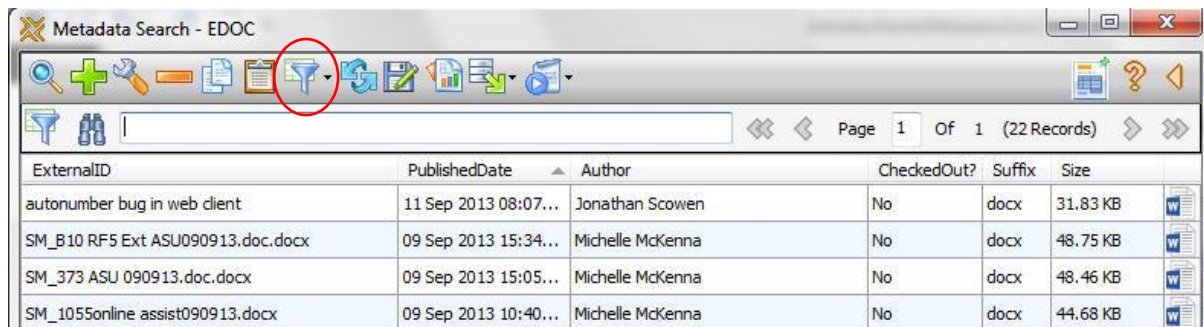
The back button is on the top right of the screen displaying your result set (the records you have found and displayed).



If you are not entirely happy with the result set just click the Back button and it will take you back to your Metadata search screen so you can further refine your search criteria (it remembers the search criteria you entered to produce this result set).

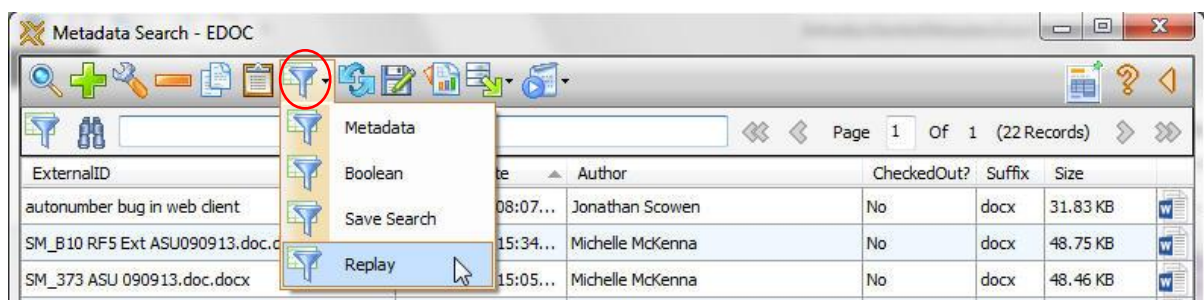
Filter Search 

The Filter Search icon is also on the screen displaying your result set.



Note: Whether or not this icon is on your screen on your local copy of RecFind 6 and what options it provides is determined by your RecFind administrator. In our productions system we include this icon and all options as you will see below.

The Filter Search may have multiple search options as follows:

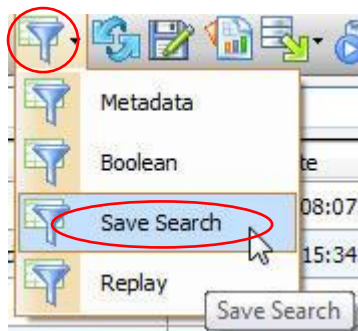


If you select the Metadata option you can then do another Metadata search on the results of your first Metadata search

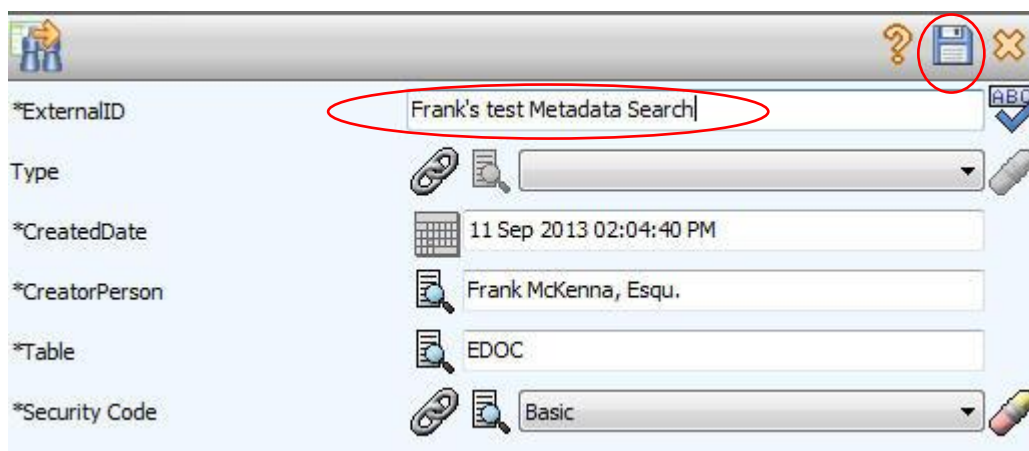


Saving your Metadata Search

When viewing your results set, click on the Filter search icon in the toolbar and then click on Save Search.



Give your search a name so you can select it in the future with the Replay menu.



Click Save  and you are done.

Note: The Save Search saves the search criteria, not the search results (the results set). As the data in your RecFind 6 database changes over time so will the results of the saved search.

For further questions on this feature please email support@knowledgeonecorp.com