

Content Manager (CM)

Create Saved Searches

Searches performed in Content Manager (CM) can be saved as **Saved Searches** and added to your **Favorites**. This allows you to quickly and easily run this same search whenever you need to, without having to re-enter the search parameters. This guide will show how to run an initial search, how to save the search and how to access and run the saved search.

Running Initial Search

This example will focus on locating Legal Documents (LDs) registered into Content Manager during 2017

1. Press CTRL + F to load Search for Records window

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2. Click on magnifying glass on right of Search By field and another window will open

By Category	O By Format	Alpha	Alphabetical				
Method Name	Caption ~	Category	Format		^		
destroyedOn	Date destroyed	Retention and Disposal	Date Range				
dueOn	Date Due	Business Process	Date Range				
imported	Date Imported	Dates and Times	Date Range				
inactiveOn	Date Inactive	m Retention and Disposal	Date Range				
updated	Date Last Updated	Dates and Times	Date Range				
ditedOn	Date Modified	Document Manageme	Date Range		1		
publishedOn	Date Published	Dates and Times	Date Range				
i receivedOn	Date Received	Dates and Times	Date Range				
registeredOn	Date Registered	Dates and Times	Date Range				
3 supersededOn	Date Superseded	Dates and Times	Date Range				
archiveOn	Date To archive (keep forever)	m Retention and Disposal	Date Range				
transferOn	Date To archive (transfer custody)	m Retention and Disposal	Date Range				
destroyOn	Date To destroy	m Retention and Disposal	Date Range				
destroyOnNoHold	Date To destroy (no holds)	m Retention and Disposal	Date Range				
i makelnactiveOn	Date To make inactive	ft Retention and Disposal	Date Range				
DateApplicationReceived	DateApplicationReceived	ab Additional Fields	Date Range				
DateDestructionApproved	DateDestructionApproved	ab Additional Fields	Date Range				
1 DateOfBirth	DateOfBirth	ab Additional Fields	Date Range				
		110			~		
Selects Records based on a value A date in your regional format: 2 A date range in your regional for	for Date Registered. 7/12/2005						
A month (uses this year), a year, i A financial year: FY2016 Last time periods(week, month, ye Last specified time period(days, w Next time period(days), wet specified time period(days)	ra month an year: June or June 200 ar): last week reeks,months,years): last 7 days ear): next month	15 or just 2005					

- 3. Click on **Alphabetical** then click on the **Caption** column until arrow is pointing up and scroll to **Date Registered**, click **OK** and another window will open
- 4. Enter dates to search, in this example 1/1/2017 [and up until] 31/12/2017



- 5. If you want to add another parameter to search by, click **New** then follow Step 3 to select new parameter.
- 6. Click on **Record Types TAB**, untick **Use default filters for searches for records**, click **CTRL + U** to untick options, then click **Legal Documents** in the **Tick Column**



7. Click OK

Saving Search Parameters

1. At top of CM, Click on Search TAB and select Save Search As

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G	€			-	X	0	0	Q	R		R	*	Q
Go Back	Go Forward	Properties	Container Records (+ Alternative)	Contained Records (+ Alternative)	Close All	Refresh Search	Reload	Find Records	Refine Search	Classification	Save Search As	Favorites	Saved Searches *
			Quick Nav	igation						Record	Searches		

2. A New Window will appear

Q New Saved Search			\times
General Access Controls			
Name Legal Documents Registered - 2017			
Description			
Records - registeredOn:01/01/2017 to 31/12/2017 - Filtered	I		0
Owner			
Craig, Andrew (Mr)			٩
Within Search Group			
			٩
Add to favorites	Edit	query	
OK Cance		Help	

- 3. Name the search as required, in this example's case Legal Documents Registered 2017
- 4. Select an Icon, otherwise default icon will be used
- 5. Tick Add to Favorites
- 6. If you want other staff members to be able to access search, remove your name from **Owner** field
- 7. Click OK

Accessing and Running Saved Searches

- 1. Click on Favorites in bottom left of Content Manager
- 2. Click on **Saved Searches**



3. A new window will open, double click on saved search you want to run

♫ Saved Searches - favorite - 1 Saved Search								
1	Name		Description					
Ċ	Legal Documents Registered 2017		Records - registeredOn:01/01/2017 to 31/12/2017 - F					

4. Results should appear

Contact Us

For further support or questions, please contact Records Services on **8313 5334** or <u>records.services@adelaide.edu.au</u>