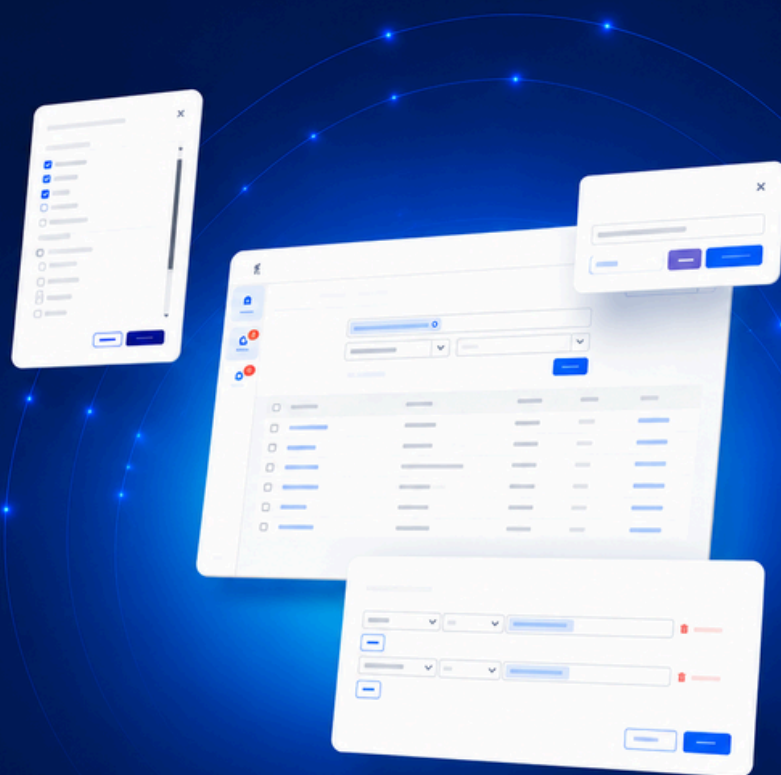


UPDATED EXPERIENCE

Etrieve Content

Search Tips and Tricks





Get more out of Advanced Search with practical tips for building better searches, finding records faster, saving time on repeat searches, and customizing your results.

SEARCH LOGIC

1. Find records where a key field is empty or populated

If you want to find documents where a specific key field is blank or has not been populated, add a row for the key field and select 'Is Empty'.

EXAMPLE

To find records for employees who are still current, you could search for:



Key Field → Employee Termination Date → Is Empty

This returns documents where the Employee Termination Date key field does not have a value. You can also use 'Is Populated' to find documents where the key field does have a value.

EXAMPLE



Key Field → Employee Termination Date → Is Populated

This returns documents where an Employee Termination Date has been entered.



TIP

Use Is Empty and Is Populated when you want to find documents based on whether a field has a value, without needing to know the specific value.

2. Search for multiple values in a single row

When you enter multiple values within the same search row, the values act as OR criteria.

EXAMPLE

To find documents where the Document Type is either 'Withdrawal Form' or 'Medical Leave Form', enter both document types in the same Document Type row.



Document Type → Is → Withdrawal Form, Medical Leave Form

Equivalent to: Document Type = Withdrawal Form OR Document Type = Medical Leave Form



TIP

Use a single row when you want to search for multiple possible values for the same attribute.

3. Combine criteria across rows to narrow your results

Each search row adds another requirement to your search, so criteria entered on separate rows are combined using AND.

EXAMPLE

To find documents where the Document Type is 'Withdrawal Form' and Status is 'Processed', add two search rows:



Document Type → Is → Withdrawal Form
AND
Key Field → Status → Is → Processed

This finds documents that meet both criteria.

Keep in mind that Advanced Search currently supports AND between search rows, while multiple values entered within a row act as OR criteria.



TIP

Use separate rows when you want to narrow your results by requiring documents to meet multiple criteria. Use multiple values within the same row when you want to find documents matching any of those values.

Note: OR searching between rows is being considered for a future product roadmap.

4. Use two rows when excluding multiple values

When searching for documents that should not have certain values, you may need to add a separate 'Is Not' row for each value you want to exclude.

EXAMPLE

If you want to find documents where Status is neither 'Processed' nor 'Complete', do not use:



Key Field → Status → Is Not → Processed, Complete

This is equivalent to Status ≠ Processed OR Status ≠ Complete. Because a document with a status of 'Processed' will match the overall condition, because it is not 'Complete' (and vice versa). Instead use:



Key Field → Status → Is Not → Processed
AND
Key Field → Status → Is Not → Complete

This excludes documents with either of those statuses.



TIP

Tip: If you put two values into a single Is Not row, the search may not return the results you expect because the values within a row act as OR criteria.

5. Search for a date range using two rows

To find documents within a specific date range, add two rows using the same date field. Use 'Is On or After' for the beginning of the date range and 'Is On or Before' for the end of the date range.

EXAMPLE

To find all documents with a check date from June 2026:



Key Field → Check Date → Is On or After → June 1, 2026
AND
Key Field → Check Date → Is On or Before → June 30, 2026

This returns documents with a Check Date value between June 1 and June 30, inclusive.



TIP

You can use this same approach with other date fields to search for documents based on a specific date range.

BUILDING BETTER SEARCHES

6. Use Key Field Search for more flexible Lookup searches

When searching by a Lookup, the search is limited to the 'Is' operator because you're searching for an exact Lookup name.

If you need to search for a specific value within a Lookup's individual key fields, use the Key Field search instead. This allows you to use the full range of available operators, such as 'Is', 'Is Not', 'Contains', 'Starts With', 'Is Empty', and other applicable options.

This also applies to system-generated key fields, such as Last Name.

EXAMPLE

Instead of searching for a specific Lookup by name, you could search the Lookup's Last Name key field using:



Key Field → Last Name → Contains → Smith



TIP

If you need more flexibility than an exact Lookup name search provides, search the individual Lookup key fields using the Key Field row.

7. Choose the right operator for exact or partial matches

When searching text fields, consider whether you want to find an exact value or search for a value that only partially matches your criteria.

EXAMPLE

If you know you only want to see documents from the Fall 2026 term, you can search by the Term key field using. Use 'Is' when you know the exact value you want to find.

 Key Field → Term → Is → Fall 2026

This searches for records where the Term is exactly Fall 2026. This type of search will require you to select something from the dropdown or search suggestions list.

Use operators such as 'Contains', 'Starts With', or other available partial-match operators when you don't know the exact value or want to find variations.

 Key Field → Term → Starts With → Fall

 Key Field → Term → Contains → Fall



TIP

If you're not getting the results you expect, check whether you're using an exact-match operator when a partial-match operator would be more appropriate, or vice versa.

8. Search by Created Date

Use this field to find documents based on when they were added to the system.

EXAMPLE USE CASES

- Find documents created within a specific date range.
- Find documents created after a certain date.
- Find documents created before a certain date.
- Find documents created on a specific date.



TIP

Created Date can be especially helpful when you're looking for recently added documents or narrowing down a large set of search results.

9. Search key fields by data type

If you aren't sure of the exact key field name you need, or you want to search across multiple key fields at once, you can search by data type instead of selecting a specific key field.

When you select Key Field in the search row, use the second dropdown to select a data type rather than a specific key field. You can search across key fields using options such as:

- **Text, Date, Number, Money or Decimal**

EXAMPLE

If you know you're looking for a date of June 1, 2026, but aren't sure which key field contains the date, you could search:



Key Field → Any Date → Is → June 1, 2026

This searches across all date-type key fields. You can also use this approach when you intentionally want to search across multiple key fields of the same data type.



Key Field → Any Text → Contains → Smith

This searches for Smith across all text-based key fields.

Data type searches search across multiple key fields, so they may return more results than you're looking for. To narrow your results, add additional search criteria such as Document Type, Area, or Category. You can also use the filters in the search results table to narrow the results even further.

TIP



Data type searches are especially useful when you know what information you're looking for but don't know the key field name, or when you want to search across multiple key fields at once. Combine them with other criteria and results table filters to narrow down your results.

10. Start broad, then narrow your search

If you're not sure what you need, start with a broader search and add criteria to narrow the results.

FOR EXAMPLE, YOU MIGHT START WITH:



Then add:

Document Type → Is → Transcript

Area → Is → Students

Then add:

Key Field → Processed Date → Is Empty

This approach can help you understand how each additional criterion affects your results and avoid building an overly restrictive search from the beginning.

11. Search using Document ID

If you know the unique Document ID, use it to quickly locate a specific document:

EXAMPLE

 Other → Document ID → Is → 12345

This can be especially useful when troubleshooting, responding to support requests, or navigating directly to a document you've been given a reference to.

REUSABLE SEARCHES

12. Save a Prompt Search for searches with changing values

If you frequently run the same search but one or more values change, use a Prompt Search.

Build the search with all of your consistent criteria, then designate the values that change as 'prompt selection' in the value fields. When you run the saved search, you'll be asked to enter the prompted values instead of rebuilding the entire search.

You can have multiple prompt rows in a single saved search.

EXAMPLE

If you frequently search for a student's documents by Student ID and Date, you could save a Prompt Search with the rest of your search criteria already defined. Each time you run the search, simply enter the student's ID and the date you want to search.

Prompt Searches also save your search results table customizations, so you don't have to recreate them each time.

This includes:

- Additional columns you've added
- The order of the columns in the table
- Your selected sort order



TIP

Prompt Searches are especially useful for repeatable searches where the search structure stays the same, but one or more values change each time. Save the search once, customize your results table, and reuse it without having to rebuild the search or reconfigure your results.

WORKING WITH RESULTS

13. Customize the Results Grid to show information you need

You don't have to rely on the default columns in your search results. You can:

- Add additional key field columns and remove columns you don't need
- Reorder columns to put the most important information first
- Adjust the results grid to show the information most useful for your search

EXAMPLE

If you're reviewing employee documents, you might remove the Area from the table (since you know all the documents are in the same area) and add Termination Date as a column so you can quickly review the values for that field without opening each document.



TIP

Customize your results grid based on the type of search you're performing. Different searches may benefit from different columns.

14. Sort your results by multiple columns

When working with many results, sort by multiple columns to organize them more effectively.

EXAMPLE

Sort first by Lookup, then by Category, then by Document Name. This groups documents by the person they belong to, then groups by the category the documents belong to, and then sorts the documents within each category by name. You can also combine sorting with customized columns to create a results grid that's tailored to the information you're reviewing.



TIP

Hold down the 'Ctrl' key (Windows) or 'Command' key (Mac) and click the sort button for each separate column you want to sort by.

15. Use the Results Grid to review information before opening documents

You don't always need to open each document individually to find the information you're looking for. Click the 'Columns' button to add relevant key fields to your results grid so you can review important metadata directly in your search results.

If a key field added to the results table exists on a document but has no value, the field will display as blank. If the key field does not exist on a document in the results, it will display as "--".



TIP

The more information you can see directly in the results grid, the less you may need to open individual documents to find the one you want.