# Advanced Search

Advanced Search

Advanced search allows you to define additional search criteria for a more targeted search and refine your search results. Advanced search is available from all iManage Work instances, even in the file picker dialogue (eg Open, Save As, Select a File). Frequently requested search fields have been added to the advanced search (Search by version, checked out state, the user who filed an email.)
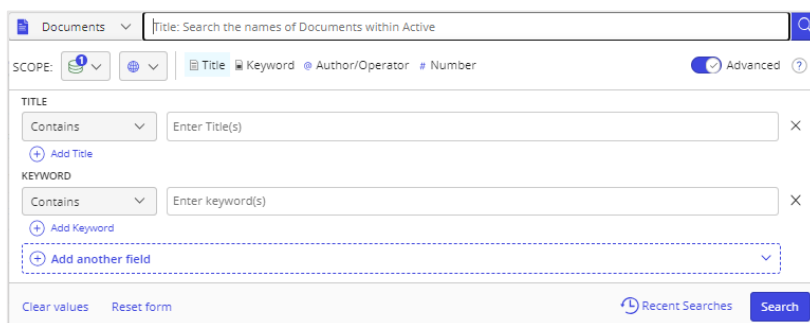

Perform a Search

1. From the search drop down select the **item** you are looking for eg **Docs & Emails.**
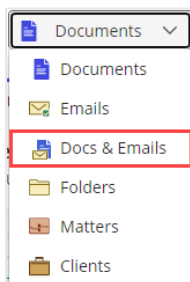
Tip: Whilst working in any node eg **Documents**, if you switch the search type eg to **Docs & Emails** as shown above, iManage Work will remember your choice for the selected node.

2. From **SCOPE:** determine where to search. (Options displayed will vary. Searches are container based eg if you are in a Matter workspace when you access search, then **Current Location** will be selected). You can also specify the **Active databases** (libraries) to search across, if only one library is in use **Everywhere** will display.
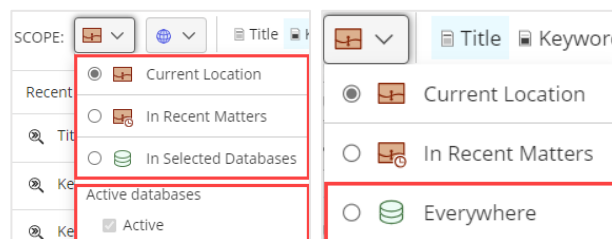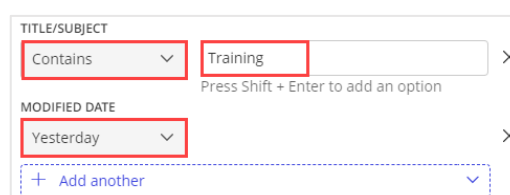

3. Click the **Advanced** toggle to switch on **Advanced** search.

Note: If any criteria exist in Simple Search, it is automatically entered into the respective fields in Advanced Search.

4. For each **criterion type** field eg **Title/Subject**, use the drop down to select the **type** of search you want to run eg **Contains**. Then enter your required **search criteria** eg **Training.**

Tip: Validated fields will contain lists you can choose from, select and add multiple items in lookups, using mouse or keyboard.

5. Click **Search**. Your search results will be displayed in **lists**, select a **tab** to switch between these lists and narrow in on matching results. These lists apply to Documents, Emails and Docs & Emails searches.
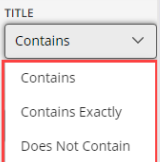

Search Results Tips

- Search results can be further narrowed down by applying a **Filter**. If performing a **Docs & Emails** search the **Filter** now shows **Email** under **File Type**.
- Use **Sort** to further organise results.
- Use **Preview** to quickly view an item.
- If you run a **Keyword** search then select the document/email so it is displayed in the **Preview** panel, the search terms will be highlighted. If you proceed to view the document/email using the full-screen preview, you can use the left pane to navigate between the search results.

Optional

- Click to add a new search criterion field, such as Number, Matter etc. Fields added to advanced search are remembered and made available for your next search

Advanced Search Options

To get targeted search results, the Advanced Search feature provides various options, as applicable in different search fields. Some of the important options are explained here:
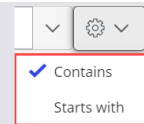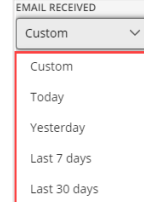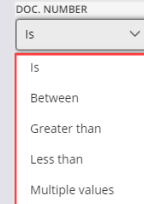
Tip: When search type is set to **Documents** or **Docs & Emails** using the **Type** criterion field, you can add file type groups for: **Documents**, **Presentation**, **Spreadsheet**, **Adobe Acrobat** and **Emails** (**Docs & Emails** only). File types are then displayed individually and can be removed individually.

- Click to remove the field from the search scope
- Click **Add Title** (or press **Shift + Enter**) to add a field for the same criterion type eg if using **Title Contains**, then **Shift+Enter** will add **Title Contains Exactly** or **Does Not Contain**
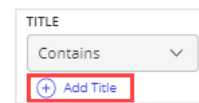
- Click to delete all entered search criteria from the search scope
- Click to delete all entered search criteria and restore the search scope to the default criteria
- Click lists the most recent searches you performed and allows you to quickly repeat the same search
- Click to set the **Language** of the search
- To view search tips click
- Use **Save as Search Folder** to save a search as a search folder

SEARCH OPTIONS	BEHAVIOUR
	Search options: Contains, Contains Exactly, Does Not Contain **Available under:** Title, Keyword, Subject, Description You can use a combination of one or more of these options to refine your results. For example: Contains and Does Not Contain (NOT Operator) / Contains and Contains Exactly (AND Operator) / Contains, Does Not Contain, and Does Not Contain
Contains (stemming applicable)	Documents, Emails, Matters containing the term or variations of the term are returned in the search results

	Input: Credit **Output:** Credit Agreement with A&G, Facilities Agreement with Creditor
Contains Exactly (stemming not applicable)	Documents, Emails, Matters containing the exact term or phrase are returned in the search results. **Input:** Credit Agreement **Output:** Credit Agreement with A&G
Does Not Contain	Documents, Emails, Matters containing these terms are excluded from the search results **Input:** Credit **Output:** Every document that doesn't have the term credit
	Starts with or **Contains** filters can be applied to custom metadata fields when searching over **Documents**, **Emails**, **Docs & Emails** and **Matters**
	Search options: Custom, Today, Yesterday, Last 7 days, Last 30 days **Available under:** Created Date, Modified Date, Sent Date, Email Received, Email Sent, Received Date, Filed Date You can use a combination of one or more of these search options to refine your results
	Search options: Is, Between, Greater than, Less than, Multiple values **Available under:** Doc. Number

Boolean Operator Search

Enter Boolean Search Operators **AND**, **OR**, **NOT**, and **NEARn** to find Documents, Emails, or Workspaces/Matters based on search terms. Operators must be entered in uppercase and in English.

BOOLEAN OPERATOR	DESCRIPTION	EXAMPLE
AND	Requires both terms on either side of the Boolean operator to be present for a match	**Input:** cat AND dog **Output:** Documents that contain the terms cat and dog
OR	Requires that either term (or both terms) be present for a match	**Input:** cat OR dog **Output:** Only documents that contain either cat, dog, or both terms
NOT	Requires that the specified term not be present. NOT takes precedence over other operators, in the absence of brackets	**Input:** cat NOT dog **Output:** Only documents that contain cat and not dog
NEARn	In the case of a phrase search, the second term must be within n words of the first term; that is, the terms are n or fewer words apart in either direction. If you don't specify n, it defaults to 5	**Input:** red NEAR1 green **Output:** Returns only documents in which the term red is next to the term green eg: documents that contain **red green** or **green red** return. Documents that contain **red orange green** don't return (because the terms aren't close enough to each other)

Tip: Boolean operators can be combined (e.g. AND NOT, OR NOT). Brackets ( ) can be used to group expressions; terms within brackets take precedence. You must not place any part of the search term in "" as an indication of priority. The system reads the order of the operators from left to right. Terms placed within ( ) are read as a unit.

Source: Search tips for iManage Work at cloudimanage.com, Search tips for imanage.work, New Search Experience, Search Learning Resources correct @ 04/09/2023