cBRAIN™

F2

cSearch

Version 8

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Reading instructions

This manual is written for users of F2 cSearch.

The manual contains a short introduction to F2 cSearch and a general description of its functionality. The description adheres to best practice in digital bureaucracy.

The manual is based on an F2 solution with all available add-on modules installed. Users may notice some differences between their own F2 client and the one presented here depending on the add-on modules included in their organisation's F2 solution.

In this manual, the names of commands are **bolded**. Commands are clickable features such as buttons. The names of fields and lists are placed in "quotation marks".

References to other sections within the document and references to other documentation are *italicised*.

We hope you enjoy using F2.

Introduction to F2 cSearch

F2 cSearch is a search tool for F2 that is able to search through various F2 formats. This makes it possible to perform searches across annotations, cases, chats, documents, notes, records, requests, and system messages.

Unlike F2's other search options, cSearch uses pre-indexed data based on the user's latest F2 activities. This is comparable to Internet search engines such as Google, Bing, etc., and presents the user with the search results almost instantaneously.

In cSearch, the user can search for a single word as well as perform advanced searches for phrases. On completing a search, the versatile preview window shows at a glance whether the result is useful. cSearch lets the user perform searches across all of F2, which is not possible using F2 Desktop. Results from cSearch may be transferred to F2 Desktop, to the "cSearch results" list.

This document is an introduction to the various search options offered by F2 cSearch.

Basis for searches

F2 cSearch searches the metadata of records, cases, and documents, including participant information, as well as the content of record documents, attached documents, approval documents (add-on module), and other documents. It also searches chats, notes, annotations, and requests (add-on module).

F2 cSearch does not search log files or case guide data (add-on module), but does search cases, records, and documents from case guides. This also applies to data from F2 Meetings (add-on module) in which F2 cSearch searches the "shadow records" created on the basis of agendas and minutes, but not the text of the meeting window.

Searching with cSearch

To open the cSearch window in F2, click on **cSearch** in the main window ribbon or use the keyboard shortcut **F4**.
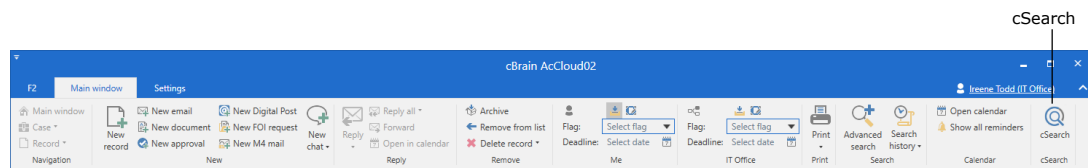

Figure 1: cSearch icon

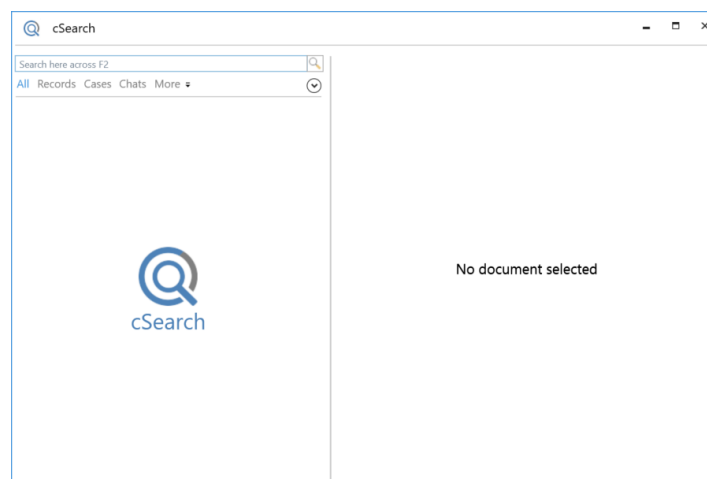The cSearch window can be accessed from the main, case, or record window.

Figure 2: The cSearch window

cSearch searches across all of F2, i.e. the "Archive", "My private records" and "Library".

> **Note**: In accordance with F2's access control, cSearch only finds results to which the user has access.

Simple search

Entering a single word in the cSearch search field, e.g. *minutes*, will perform a search across all cases, records, documents, etc. which include the word.

Entering multiple words in the field, e.g. *minutes meeting*, will perform a search across cases, records, documents, etc. which include both these words.

cSearch displays an excerpt of each result with the search word(s) bolded, letting the user see the context at a glance.
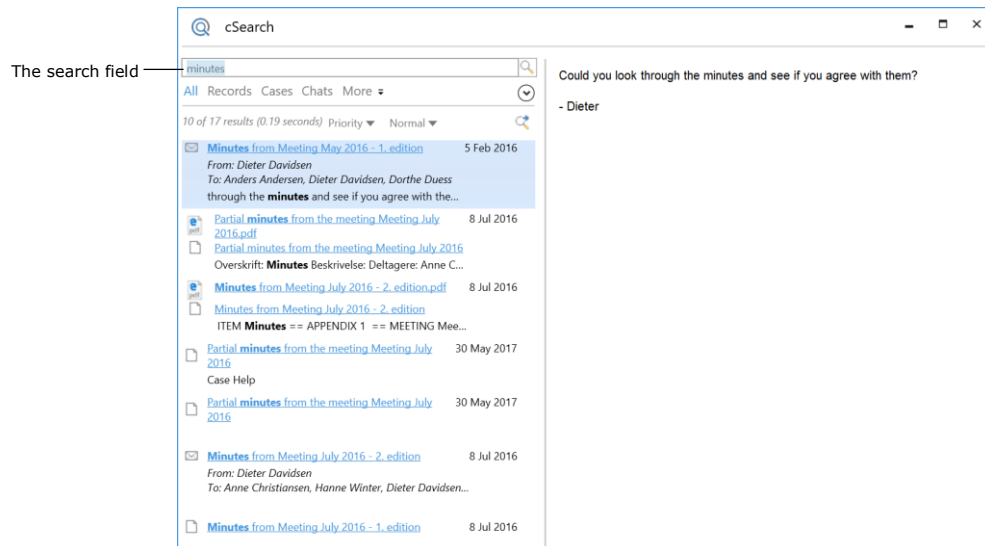
Figure 3: A simple search in cSearch

A list of metadata search fields can be opened by clicking the search field and then pressing the **down arrow** key. A selected metadata field is highlighted in blue. See the figure below.
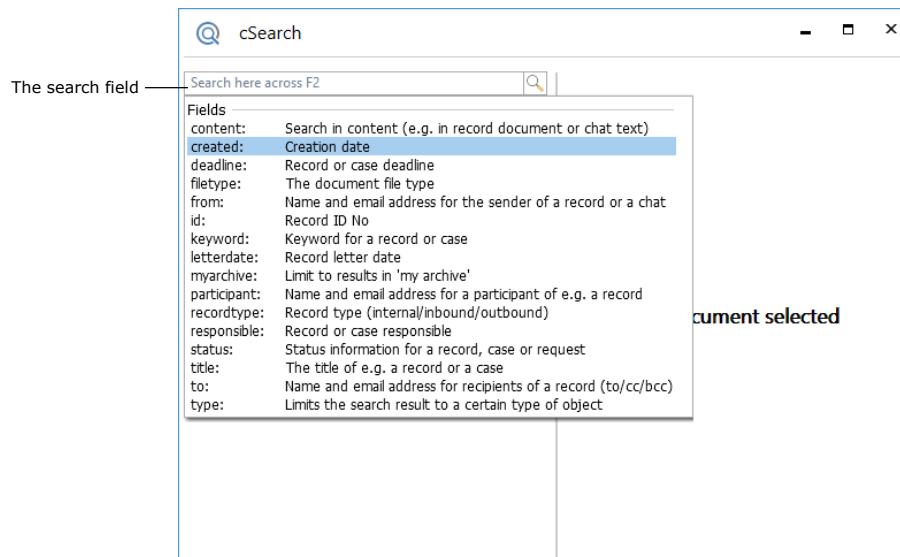

Figure 4: Metadata search fields in cSearch

Using the asterisk

The asterisk (*) functions as a wildcard, i.e. as a stand-in for zero or more characters. This means that entering *public** performs a search for words beginning with "public", including "publication" and "publicity".

cSearch automatically adds an implicit asterisk after the search string, which means that entering *public* and *public** will yield the same results. If the user does not want to use the wildcard function, a space must be added after the search string. For example, searching for *[public]* will yield records, cases, documents, etc. containing the text string "public", but excluding "publication" and "publicity".

> **Note**: The above only applies to a certain number of metadata fields. It is not applicable when selecting metadata fields such as "Record type", "Deadline" or similar fields for which the search input is limited.

Using the question mark

The question mark (?) functions as a wildcard for a single character. Searching for e.g. *Eri?a* will yield results containing both "Erica" and "Erika".

Searching for text strings

In cSearch, searching for text strings is limited to the "Title", "Content" and metadata fields. cSearch automatically searches these fields when the user enters text in the search field.

> **Note**: When searching for text strings, cSearch only yields results in which the entire string appears in the same category. This means that a search for *communications officer* will only yield results in which both words appear in the same field, e.g. "Content". Objects in which *officer* appears in "Content" and *communications* appears in "Title" are not included.

As stated above, in a search for multiple words, e.g. *application position*, an asterisk is automatically added at the end of the string. To avoid the wildcard function, add a space at the end.

cSearch does not consider the word order of the search text. This means that performing a search for the words in the above paragraph (with no space at the end) yields results such as "*Application* for the *position* of communications officer" and "RE: The *position* of communications officer (*application* #2)".

To search for an ordered text string, use quotation marks, e.g. *"application for the position"*. This will yield results that matches the word order of the text in the quotation marks exactly.

> **Note**: In searches with text in quotation marks, cSearch does not automatically add an asterisk.

Searching with AND, OR, NOT

When searching for multiple words, cSearch only shows results which contain all the entered search words. This can be adjusted using the logical operators AND, OR and NOT.

Operator	Example
"AND"	A search for *job AND application* will find records, documents, etc. containing both the word *job* and *application.*
"OR"	A search for *job OR application* will find records, documents, etc. containing either the word *job* or *application*.

Operator	Example
"NOT"	A search for *job NOT application* will find records, documents, etc. containing the word *job*, but not the word *application*.

> **Note**: The operators must be capitalised. cSearch does not add an asterisk to searches with AND, OR, or NOT.

Using parentheses

cSearch contains various metadata search fields which are described in the following sections. When using metadata search fields, cSearch groups the search words as follows: A search for *from:Klaus agenda* yields results with *Klaus* in the "From" field and *agenda** as free text in various fields.

Parentheses can be added to change this grouping. A search for *from:(Klaus Salomon)* yields results with *Klaus Salomon* in the "From" fields in F2.

Searching with intervals

cSearch uses brackets when searching for intervals.

For example, it is possible to search for records with a deadline between January 1st and July 1st by entering *deadline:[1-1-2019 1-7-2019]*, or to search for records with an ID number between 100 and 400 by searching for *id:[100 400]*.

Date intervals

The "Created", "Deadline" and "Letter date" fields contain special syntax to make it easier to search for intervals, e.g. *deadline:Yesterday*, *deadline:Today*, *deadline:Tomorrow*, and *deadline:-3 (up to three days ago)*. These options are shown by typing *deadline:* in the search field, along with suggestions from the search history.
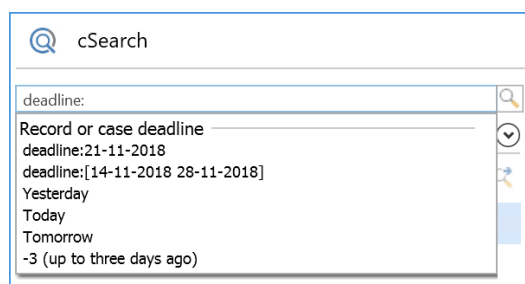
Figure 5: Search for "Deadline"

Metadata search fields

cSearch supports a number of metadata search fields that can be used to refine a search.

By clicking the search field and pressing the **down arrow** key, a list of metadata search fields appears.
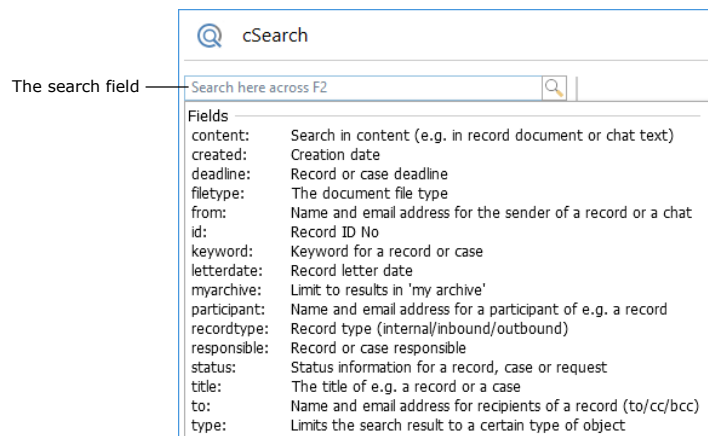
Figure 6: List of metadata search fields

Select a metadata search field by clicking on the list or by typing its name followed by a **colon**.

Certain metadata search fields offer search suggestions. For example, the "Record type" field (formatted as "recordtype") displays a fixed list of options when entering a **colon**.
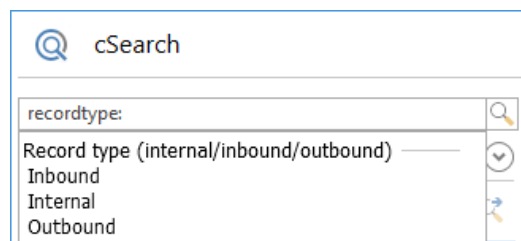

Figure 7: Options for the "Record type" search field

Other metadata search fields, such as "From", do not have fixed value lists. For these fields, cSearch offers suggestions based on previous searches or text entered by the user.
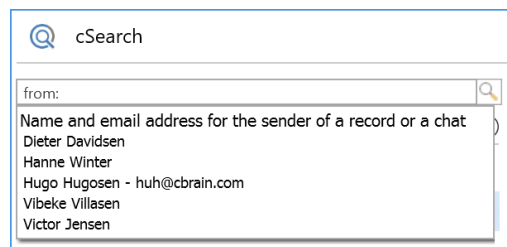
Figure 8: Suggestions based on search history

The table below describes the metadata search fields and their functionality.
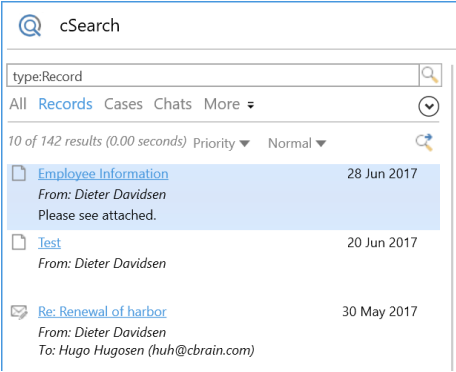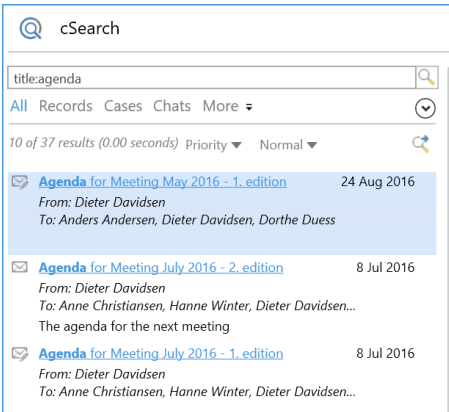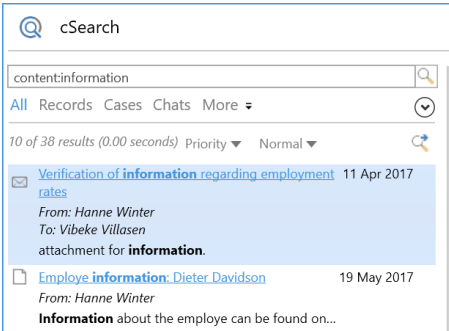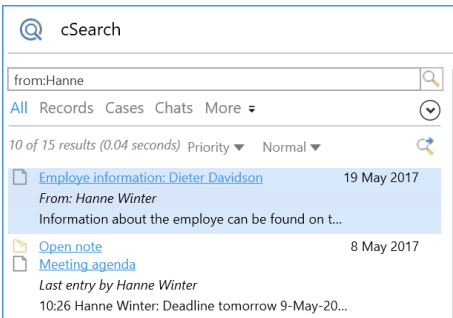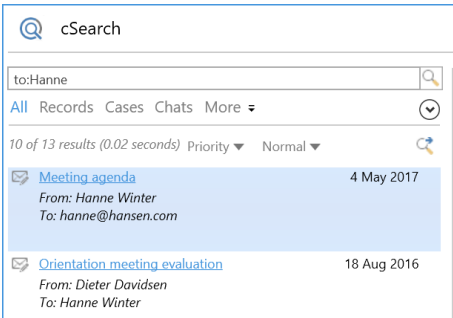
Metadata search field	Description and example
"Type"	Limits the search to a certain type of result. The types are: • annotations • cases • chats • documents • notes • records • requests • system messages. When searching for a type, e.g. *type:Record* as in the image below, cSearch only presents results in which the search string appears in the record's metadata, its title, or in the record document. cSearch does not search attached documents, chats, requests, etc. **Note**: cSearch will search for all types if no specific type has been selected. Example: **Figure 9: Search for "Record type"**

Metadata search field	Description and example
"Title"	Limits the search to titles only. Title searches include titles of cases, records, documents. Example: **Figure 10: Search for "Title"**
"Content"	Limits the search to content only. Content is defined as follows for each type of search object: • Records: Title and text in the record document • Requests: Request type and text in the "Description" field • Chats: Text in chat • Documents: Title and text in document • Notes: Text in note • Annotations: Annotation type and the annotation text itself • System messages: Message text. Example: **Figure 11: Search for "Content"**

Metadata search field	Description and example
"From"	Search for the name or email address of a record's sender. A search for "From" returns records. Example: **Figure 12: Search for "From"** It is also possible to search for email addresses or domains. Examples: • from:abraham@mail.co.uk • from:beatrice@organisation.org
"To"	Search for the name or email address of a recipient of an email record. Example: **Figure 13: Search for "To"** As with a "From" search, it is also possible to search for full email addresses or domains.

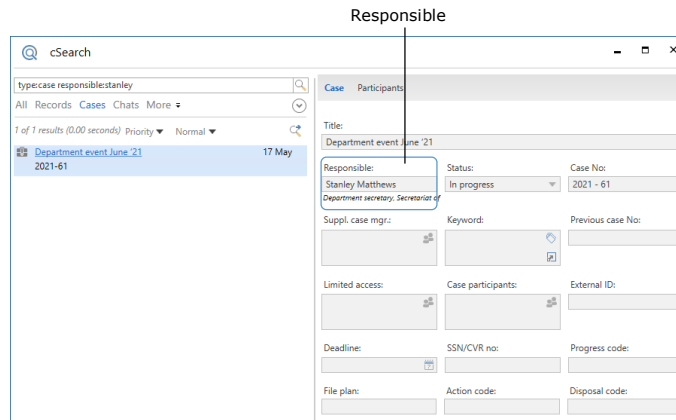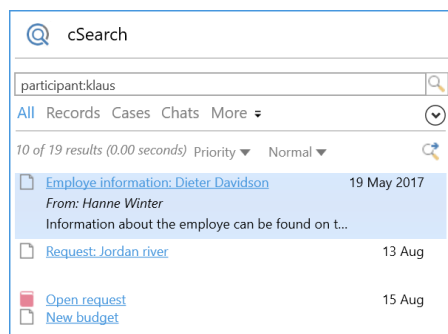| Metadata search field	Description and example
"Responsible"	Search for the name of the responsible unit or case manager. In a search for "Responsible", cSearch will find records and cases. Example: **Figure 14: Search for "Responsible" on a case**
"Participant"	Search for the name or email address of a participant that is part of a record's metadata. **Figure 15: Search for "Participant"** • For records, participants who are involved in the record will be found. This applies to both units and users who are directly involved or who are involved because the record has been shared with them. • For chats and notes, participants who are listed as chat or note participants will be found. • For cases, participants who are listed in the "Case participants", "Suppl. case mgr.", "Meeting participant" (for meeting cases) or "Case responsible" metadata fields will be found.

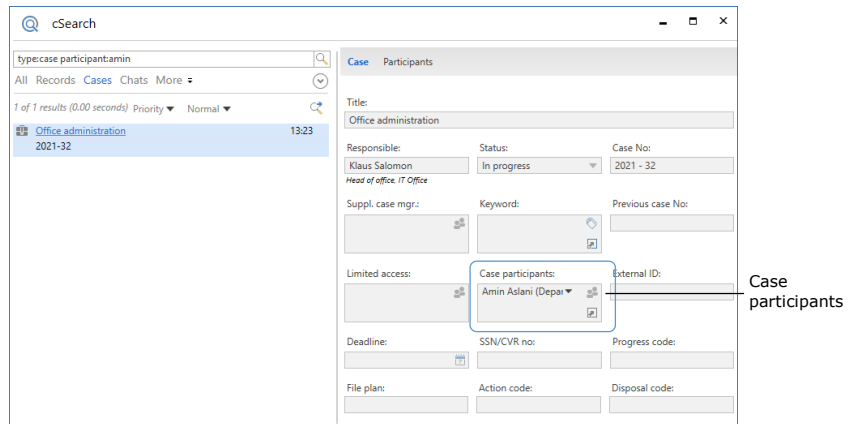| Metadata search field	Description and example
	Example:

Figure 16: Search for "Participant" on a case

- For requests, participants included in the request such as creator, executor, etc. will be found.

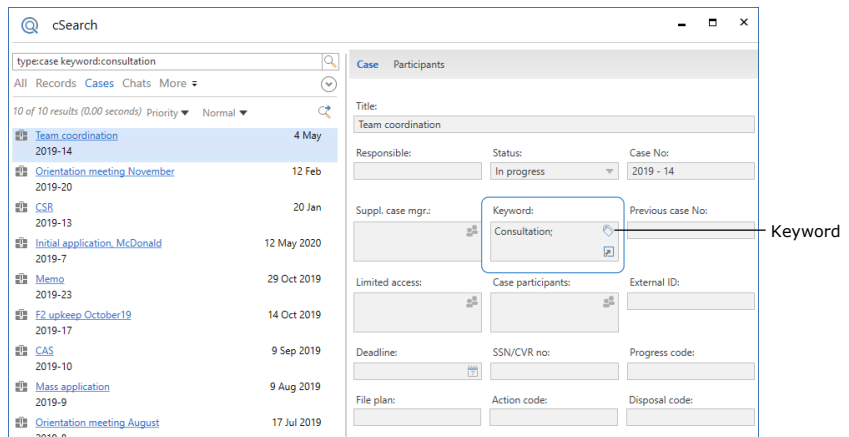| "Keyword"	Search for a keyword on a record or case. Example:

Figure 17: Search for "Keyword" on a case

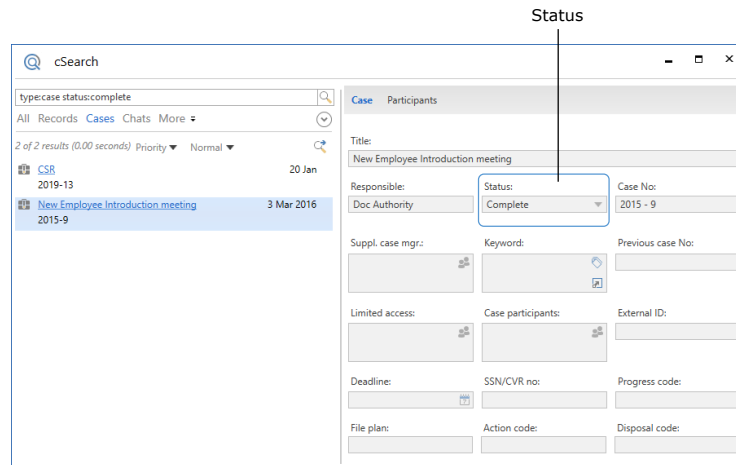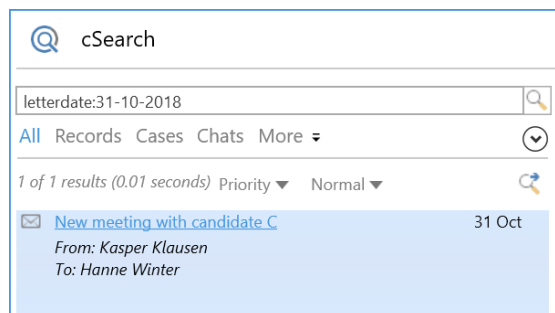| Metadata search field	Description and example
"Status"	Search for a status on a case, record, or request. Example: **Figure 18: Search for "Status" on a case**
"Letter date"	Search for a letter date on cases. Example: **Figure 19: Search for "Letter date"**

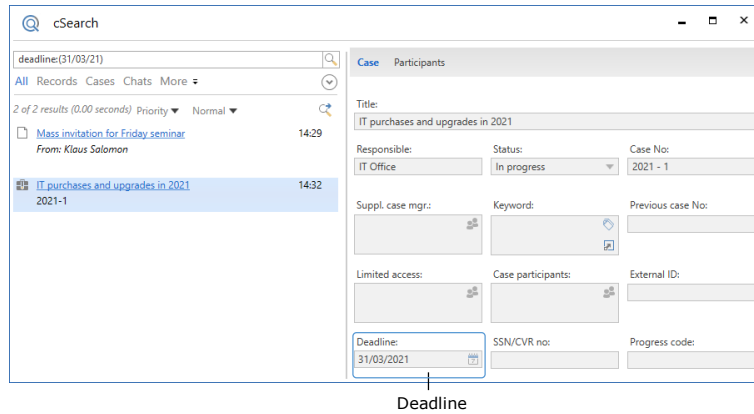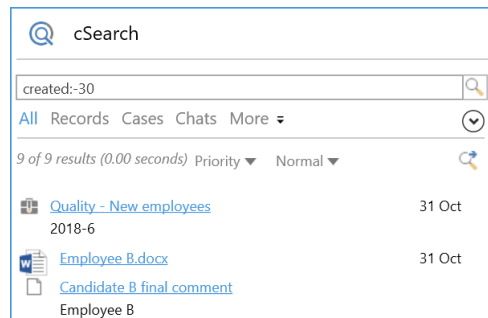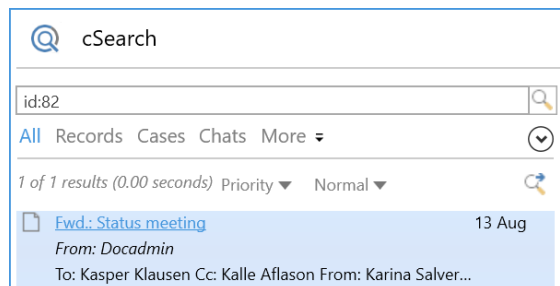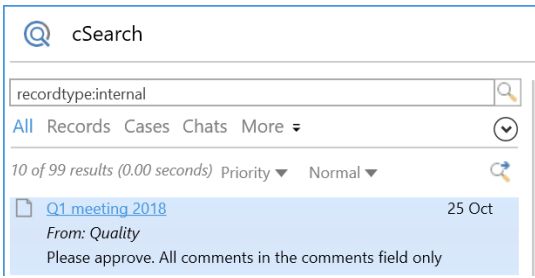| Metadata search field	Description and example
"Deadline"	Search for a deadline on a case, record, approval, or request. Example: **Figure 20: Search for "Deadline" on a case**
"Created"	Search for created date. In this search cSearch finds records, request, chats, documents, annotations, cases, and system messages. Example: **Figure 21: Search for "Created" date**
"ID"	Search for a record's ID number. Example: **Figure 22: Search for "ID"**
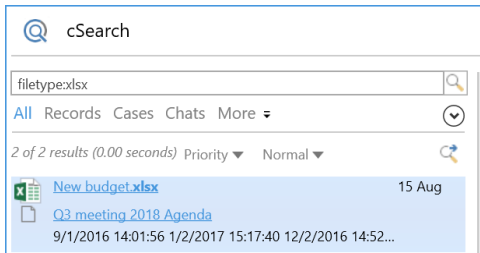
Metadata search field	Description and example
"Record type"	Search for a record's type which can be either incoming, internal or outgoing. Example: **Figure 23: Search for "Record type"**
"File type"	Search for a document's file type, e.g. DOCX, HTML, PDF, XLXS, or XML. Example: **Figure 24: Search for a document's file type**

The table above contains examples of how to use the metadata search fields in cSearch. The fields may be combined, allowing the user to perform a search for e.g. records in which the word *information* appears in the title. This particular search is performed by entering *type:record title:information* in the search field. A search for records with the word *information* in the title which contain the keyword *budget* would look like this: *type:record title:information keyword:budget**.

> **Note**: cSearch will only search among the types (record, document, case, chat, etc.) for which a given metadata field exists. For example, searching for *type:Document letterdate: [01-01-2018 31-12-2018]* yields no results because documents do not have the "Letter date" field.

Result priority

cSearch orders the search results so the most relevant results are shown at the top of the list.

The order is determined by cSearch's index, which contains the searchable data. Prioritisation is based on a number of search algorithm criteria, in particular when the user last opened the object and when the object was last edited. The frequency

of the search word and whether search words are grouped together in an object also influence priority.

The search results can be sorted by type. Click on a type in the menu under the search field to sort by type. See the figure below.
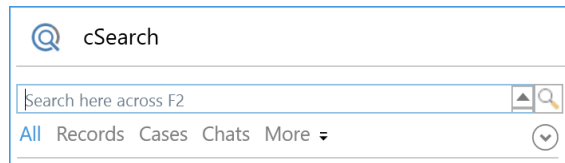

Figure 25: The menu for sorting by type

Choose between "All", "Records", "Cases" and "Chats". Click on **More** to see the options: "Documents", "Requests", "Annotations", "System messages" and "Notes".
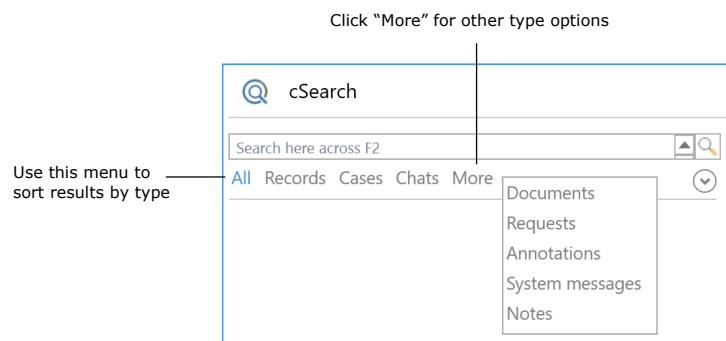

Figure 26: The hidden options under "More"

The results can be further sorted by using metadata fields. Every menu item has a number of associated metadata fields. View the metadata fields by clicking on the **drop-down arrow** ⊙ on the right side of the menu. The different menu items and their associated metadata fields are described in the menu below.

Menu item	Description
"All"	Shows all search results. Limit the search by using the metadata fields: • "Content". Search for results that contain the entered word. • "Created". A "From" and "To" date can be entered to confine the search results to results within the selected time frame.
"Records"	Only shows records in the result list. Limit the search by using the metadata fields: • "From". Search for the sender of the record. • "To". Search for the record's recipient or copy recipient.

Menu item	Description
	• "Content". Search for records that contain the entered word. • "Created". A "From" and "To" date can be entered to confine the search results to records within the selected time frame.
"Cases"	Only shows cases in the result list. Limit the search by using the metadata fields: • "Content". Search for cases containing the entered word. • "Case No". • "Created". A "From" and "To" date can be entered to confine the search results to cases within the selected time frame.
"Chats"	Only shows chats in the result list. Limit the search by using the metadata fields: • "Content". Search for chats containing the entered word. • "Created". A "From" and "To" date can be entered to confine the search results to chats within the selected time frame.
"Documents"	Only shows documents in the result list. Limit the search by using the metadata fields: • "Content". Search for documents containing the entered word. • "Created". A "From" and "To" date can be entered to confine the search results to documents within the selected time frame.
"Requests"	Only shows requests in the result list. Limit the search by using the metadata fields: • "Content". Search for requests that contain the entered word. • "Created". A "From" and "To" date can be entered to confine the search results to requests within the selected time frame.
"Annotations"	Only shows annotations in the result list. Limit the search by using the metadata fields: • "Content". Search for annotations that contain the entered word. • "Created". A "From" and "To" date can be entered to confine the search results to annotations within the selected time frame.

Menu item	Description
"System messages"	Only shows system messages in the result list. Limit the search by using the metadata fields: • "Content". Search for system messages that contain the entered word. • "Created". A "From" and "To" date can be entered to confine the search results to system messages within the selected time frame.
"Notes"	Only shows notes in the result list. Limit the search by using the metadata fields: • "Content". Search for notes that contain the entered word. • "Created". A "From" and "To" date can be entered to confine the search results to notes within the selected time frame.

Results can also be sorted by age. This sorting will list search objects that were edited most recently at the top of the list. Change to this listing by switching from **Priority** to **Age** in the cSearch window as shown below.
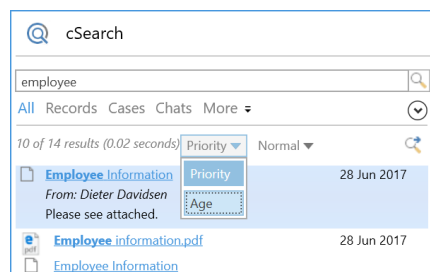
Figure 27: Switch to "Age"

Extended search

If a normal search does not yield the expected result, the search may be broadened by switching to **Extended** search via the drop-down menu as shown below.
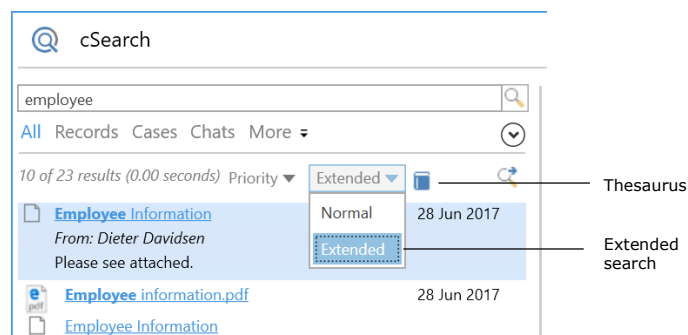
Figure 28: Switch to extended search

An **Extended** search finds words related to the entered search word in two ways:

- Search for synonyms. If the user searches for e.g. *report,* results containing the words *account* and *paper* are included.

- Search for words similar to the search word. If the user searches for *situaion* (note the missing "t"), cSearch will also yield results containing *situation* because of the similarity between the two words.

As with a normal search, an extended search allows for the use of operators and metadata fields.

> **Note:** cSearch comes with a thesaurus. After an extended search, the included synonyms can be viewed by clicking the 📘 icon as shown above. An administrator may add more synonyms.

Transfer cSearch results to F2's main window

cSearch's list of results can be transferred to F2's main window. To transfer the results, click the ⚲ icon in the cSearch window.
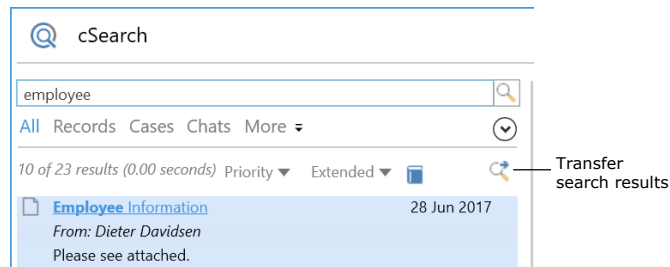
Figure 29: Transfer search results

The dialogue below opens, and either the displayed excerpt of records or all records can be transferred from the cSearch result list to F2's main window.

Click **Add** to add the selection to the "cSearch results" folder. Click **Overwrite** to replace the folder's existing content (if a previous search was transferred) with the new search results. This will transfer the cSearch results in the form of records to the "cSearch results" folder. The folder is located in the "Folders" node in the list view at the left of F2's main window.
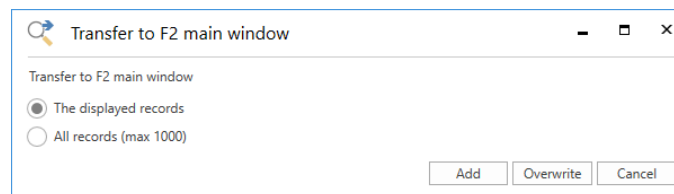
Figure 30: Transfer results to F2's main window

Only search results containing records can be transferred. If the list does not contain any records, e.g. if the list contains only cases, the dialogue below appears.
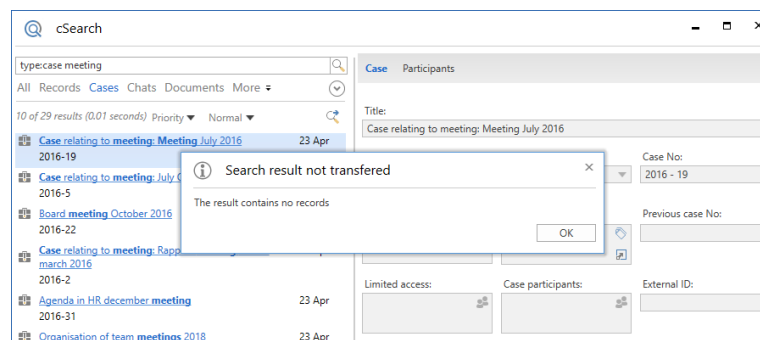
Figure 31: The "Search result not transferred" dialogue

Search history

Previous searches are saved in the search history. To show the four latest searches, click the search field and press the **down arrow** key.

When text is entered in the search field, cSearch will check the search history and suggest a previous search if a match is found.

Figure 32: Search history of the cSearch window

List of figures