



◀ iManage Work in the Cloud

# Search tips for iManage Work at cloudimanager.com

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Neal Veldheer

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- iManage Work customers using the cloudimanager.com endpoint.
- IT help desks and training departments creating tip sheets for their communities.

## Summary

This guide covers best practices for searching for content in iManage Work.

### In this guide:

- [Search guidance for better results](#)
- [Search interface in iManage Work Web](#)
  - [Simple search](#)
  - [Advanced Search](#)
- [Types of searches in iManage Work](#)

## Search guidance for better results

This guide provides comprehensive guidance on how to properly perform searches in iManage Work. If a search doesn't return the document you want, try the following tips before running the search again:

- Search for the document using profile fields (metadata), such as the document number, without any full-text criteria. If the document isn't retrieved, the reason may be something unrelated to the search itself, such as the document having been deleted or having security access restrictions.
- Check the search query for special characters. Try to reformulate the query with other terms in the target document.

- Select the correct library or libraries to narrow down the results.

# Search interface in iManage Work Web

## In this section:

- [Simple search](#)
- [Advanced Search](#)

The iManage Work Web interface provides search functionality at two levels, called simple search and Advanced Search. Advanced Search provides finer control over your search criteria than simple search, and it also allows you to save a search for re-use.

### NOTES:

- The images included in this section pertain to the user interfaces for iManage Work 10 Web and iManage Work Desktop for Windows.
- A library is the highest-level container. Only an iManage system administrator can create and name a library. Libraries can hold workspaces, and only workspaces can exist at the root level of a library.

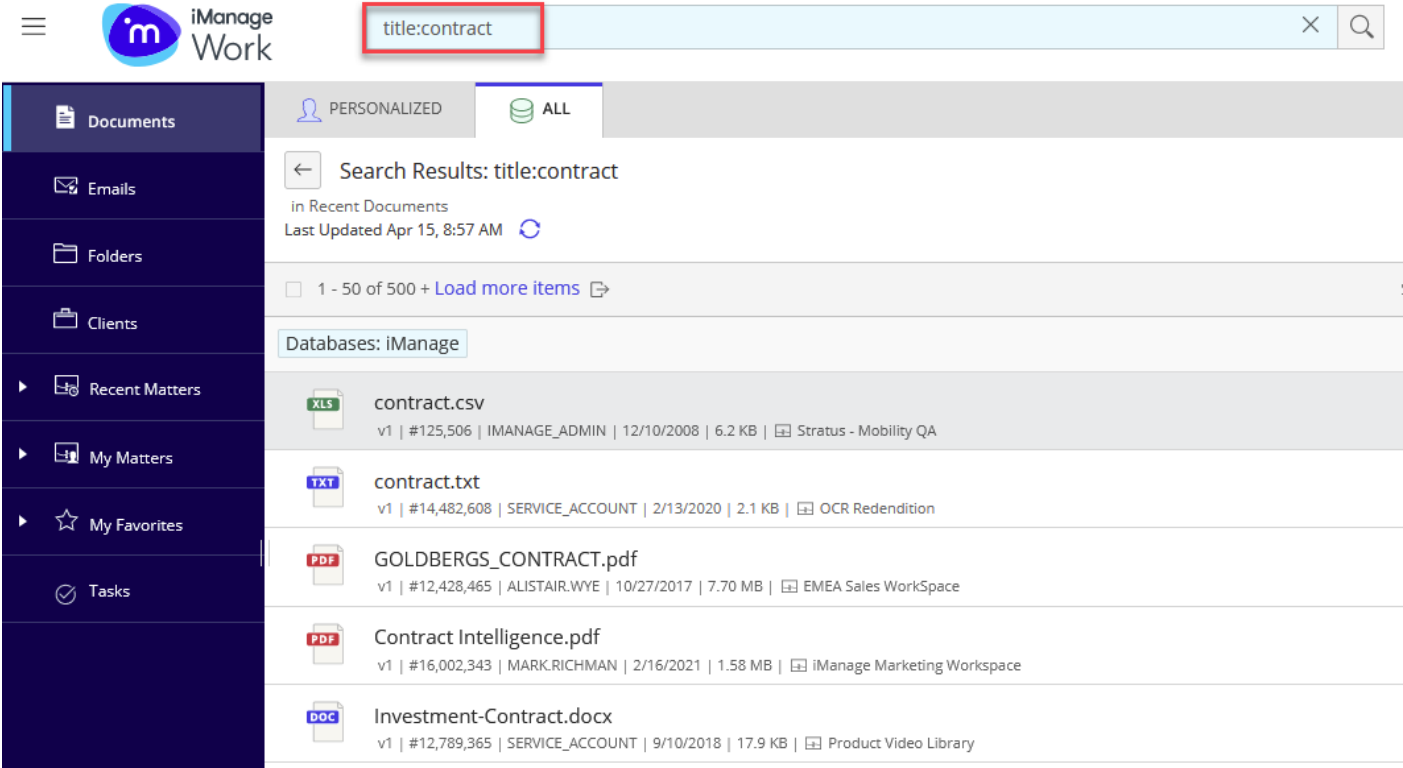
## Simple search

### In this section:

- [Searching for documents](#)
- [Searching for emails](#)
- [Searching for folders](#)
- [Searching for matters](#)
- [Searching for clients](#)
- [Recent Searches](#)
- [Simple search behaviors and examples](#)

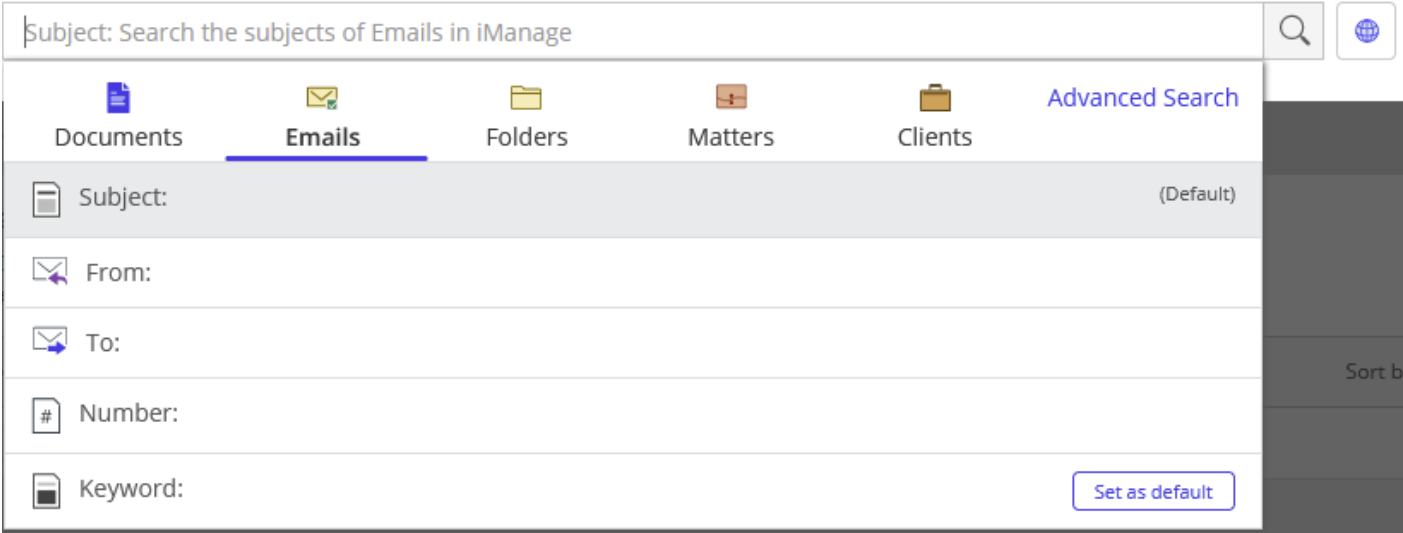
By default, a simple search in iManage Work searches by document Title. You may also search by Author, Number (for specific document numbers), or Keyword. Refer to the [Searching for documents](#) section for more information on each of these options.

### Figure: Simple search




You may also perform a simple search for emails, folders, matters, and clients. Place your pointer in the search field to see these options.

Figure: Searching for emails, folders, matters, or clients



## Searching for documents

1. Click inside the search box and select

 **Documents.** The list of search options is displayed:

o



**Title:** Performs against document titles. A document is returned in the search results only if the

search term is a part of the document title. If you've been using iManage Work 9.x, the Title field corresponds to the Document Name or Document Description field.

◦



**Author/Operator:** Performs if you're searching for individuals associated with the document. While entering the name of the user, you can enter the @ symbol followed by the user name to display the list of users with similar names. This action helps you select the required user without having to type their name in full. For example, @Jo displays all names that have the string Jo in them, such as John Jason, Simon Joe, and Jonathan Tye. Entering a space stops suggestions from being triggered.

◦



**Number:** Performs the search on the document number. It does an exact number search across the entire library, even if you're within a folder. As a quick search option in iManage Work 10 clients, you can enter the pound (#) sign into the search bar, followed by the document number. For example, entering #10 returns Document Number 10.

◦



**Keyword:** Performs a full-text search, meaning it looks for your search term anywhere in the document, including the document body, document title, and the Alias of properties fields used for the document. You can also manually enter **Keyword: <search string>** into the search bar to perform this type of search.

- **NOTE:** Selecting **Set as default** makes Keyword search the default search criteria. Refer to the [Types of searches in iManage Work](#) section to learn how to refine your search terms.

2. Enter the search term into the search box and then select



or press **ENTER**.

## Searching for emails

1. Click inside the search box and select



**Emails.** The list of search options is displayed:

◦



**Subject:** Looks for the search terms in the subject line of the emails. This option is the default.

◦



**From:** Looks for users in the From field of an email.

◦



**To:** Looks for users in the To field of an email.

◦



**Number:** Performs a search on the Document Number. It does an exact number search across the entire library, even if you're within a folder. As a quick search option in iManage Work 10 clients, you can enter the pound (#) sign into the search bar, followed by the document number. For example, entering **#10** returns Document Number 10.

◦



**Keyword:** Performs a full-text search, meaning it looks for your search term anywhere in the email, including the email body, subject of the email, attachments (if any), and the Alias of properties fields used for the email.

- **NOTE:** Selecting **Set as default** makes Keyword search the default search criteria. Refer to the [Types of searches in iManage Work](#) section to learn how to refine your search terms.

2. Enter the search term into the search box and then select



or press **ENTER**.

## Searching for folders

1. Click inside the search box and select



**Folders.**

2. Enter the name of the folder into the search box and select



or press **ENTER**.

## Searching for matters

1. Click inside the search box and select



**Matters.** The list of search options is displayed:

◦



**Title:** Performs against matter names. A matter is returned in the search results only if the search term is a part of the matter name. This option is the default.

◦



**Description:** Performs against the description of the matter, which is used for outlining information about a matter that might not be covered by the name.

◦



**Owner:** Looks for matters based on the matter's owner.

◦



**Keyword:** Performs a full-text search, meaning it looks for your search term anywhere in the matter, including:

- Workspace Name
- Workspace Description
- Custom 1 – Alias
- Custom 2 – Alias
- Custom 29 – Alias
- Custom 30 – Alias

**NOTES:**

- Full-text search is limited to the above-mentioned fields. For other fields, it performs a database search.
- Selecting **Set as default** makes Keyword search the default search criteria.

2. Start entering the search term into the search box, or for a more refined search, choose a search option, enter the search characters within the quotation marks, and select



. The results list is narrowed down to display the matters that meet your search criteria.

## Searching for clients

1. Click inside the search box and select



**Clients.** You can search for clients only by name.

2. Enter the name of the client into the search box and select



. The results list is narrowed down to clients that meet your search criteria. Searching for clients is limited to Title search.

#### NOTES:












- Client search performs a **Contains** search as opposed to a **Begins with** search. For example, a search with the string **Go** returns all clients with **Go** in the name, such as **Goldberg** and **Snider Go**.
- Searching for clients returns results from your Preferred Library only.

## Recent Searches

If you've previously searched for content, you see a Recent Searches list that displays the last five search terms per search option (Documents, Emails, Folders, Matters, and Clients) that you used. You can remove any of the displayed search terms in the list by selecting **X** in the row of the search term, or you can remove all searches by selecting **Clear Recent Searches**.

**NOTE:** The list of recent searches is maintained separately in each iManage Work application.

**Figure: Recent Searches list**

Search Documents within ACTIVE					
 Documents	 Emails	 Matters	 Clients	Advanced Search	
Recent Searches in Documents				Clear Recent Searches	
 Agree?					X
 Agree*					X
 Agree?*					X
 APPLE OR Samsung					X
 APPLE AND Samsung					X

## Simple search behaviors and examples

**NOTE:** Title search is the default search used. Select **Keyword** to search the entire document.

SEARCH TERMS	TYPE OF SEARCH	SEARCH RESULTS
<b>APPLIES TO</b>		
Agrees Operation	Search for terms and their variations.	Documents containing the variations of the terms.  <b>Examples:</b>  Input: <b>Agrees</b> Output: <b>agree</b> and <b>agreed</b>  Input: <b>Operation</b> Output: <b>operations, operate, operating, operator</b>
<ul style="list-style-type: none"> <li>• Documents</li> <li>• Emails</li> <li>• Workspaces</li> </ul>		
"Credit Agreement"	Search for phrases and their variations.	
Documents containing both terms, irrespective of their locations in the document and their stemmed variations.  <b>Example:</b>  Input: " <b>Credit agreement</b> " Output: <b>credit agreement, creditor agreements</b>		
<ul style="list-style-type: none"> <li>• Documents</li> <li>• Emails</li> <li>• Workspaces</li> </ul>		
Document11 1233		
Search for numbers or alphanumeric terms in the Title of the document, any metadata fields, and anywhere in the document content.		



Documents containing the search string (all terms, because the default operator is AND) anywhere in them.

The difference between searching for numbers and alphabetical characters is that terms that are purely numeric or alphanumeric don't stem at all.

#### Examples:

Input: **Document11**

Output: **Document11**

Input: **Document11 1233**

Output: Documents containing titles **Document11** and **1233**

- Documents
- Emails
- Workspaces

553\*

Search with wildcards.

Operator: \* (Asterisk)

Documents containing the search number or alphanumeric term fragment. Use the wildcard in place of any unknown characters.

#### Example:

Input: **553\***

Output: **5539, 553A**

- Documents
- Emails
- Folders
- Matters
- Clients

10/29/17

Search for dates in full-text.

When searching for dates in full-text, it's interpreted as a search for **10 AND 29 AND 07** and returns documents having all three numbers in any order.

#### Example:

Input: **10/29/07**

Output: Documents containing **10/29/07, 10-29-07, 07 10 29, 07-29-10, 07.29.10**, and so on.

- Documents
- Emails
- Matters

rou\*

Search with wildcards.  
Operator: \* (Asterisk)

Documents containing words that include the search string. Use \* as a wildcard—beginning with the third character, because wildcards can't be used in the first or second character positions—in place of any number of unknown characters.

**Example:**Input: **rou\***Output: **Route** and **Round**

- Documents
- Emails
- Folders
- Matters

Agree?

Search with wildcards.

Operator: ? (Question mark)

Documents containing words that include the search term and the missing character in the exact location. Use ? as a wildcard—beginning with the third character, because wildcards can't be used in the first or second character position—in place of any number of unknown characters.

**Example:**Input: **Agree?**Output: **Agree**, **Agreed**, and **Agrees**.

However, it doesn't return **agreement** because the request calls for only one wildcard character at the end of the term.

- Documents
- Emails
- Matters

## Advanced Search

## In this section:

- [Advanced Search overview](#)
- [Advanced Search options and examples](#)

## Advanced Search overview

Advanced Search allows you to define additional search criteria for a more targeted search, and also to refine your search results. You can also save an Advanced Search to re-use it later.

**NOTE:** The Advanced Search interface is available only in iManage Work Web, iManage Work Desktop for Windows, and iManage Work Mobility.

**Figure: Advanced Search**

keyword:apple NOT samsung

Documents | Emails | Folders | Matters | Clients | **Advanced Search**

Title: (Default)

Author/Operator:

Number:

Keyword: apple NOT samsung [Set as default](#)

Recent Searches in Documents [Clear Recent Searches](#)

To use Advanced Search:

1. Click inside the Search box and select **Advanced Search**. Any search criteria you've already entered is automatically carried over into the respective field in Advanced Search.

**Figure: Advanced Search menu**

Advanced Search

Recent Searches

Documents Emails Docs & Emails Matters Folders

Search Scope:

Title Contains Enter Title(s)

Modified Date Select

Keyword Anywhere Contains apple NOT samsung

+ Add Additional Criteria Clear Save as Search Folder Search

Hide Criteria ^

Personalized All

1 - 50 of 500 + Load more items Sort by: Relevance ↓

EnronEmails [Use for Training Content].zip  
v1 | #2,488,989 | JOHN.HOGAN | 1/15/2018 | 429.08 MB | Hogan, John - Personal Workspace

Apple-OCG.pdf  
v1 | #2,840,423 | ALISTAIR.WYE | 10/25/2018 | 177.7 KB | RAVN Presales Collateral

Apple UI Design Resources License.rtf  
v1 | #2,796,917 | SINISA.ROGIC | 9/18/2018 | 15.5 KB | Kim's Documents

2. Choose your search from the following selections:

- Documents
- Emails
- Docs & Emails
- Matters
- Folders

3. In **Search Scope**, select one or more libraries for your search operation. This drop-down list is displayed only if more than one library is available.

4. In the criteria drop-down lists, select the filters and values to search for. In the text fields, enter the text you're looking for. The following figure shows the results for a document search where:

- The document title must include **apple** in the title.
- The created date range must be between July 06, 2016 and September 17, 2018.

**Figure: Advanced Search menu**

Advanced Search

Documents | Emails | Docs & Emails | Matters | Folders

Search Scope: All

Title Contains Exactly "Apple"

Created Date Between 07/06/2016 & 09/17/2018

+ Add Additional Criteria Clear Save as Search Folder Search

Hide Criteria

Personalized | All

31 results Sort by: Relevance

	apple_pie.docx	v1   #2,144,264   MATT.HARPER   3/22/2017   11.1 KB	
	apple_pie.docx	v1   #2,144,614   MATT.HARPER   3/23/2017   38 B	
	apple_pie.docx	v1   #2,144,611   MATT.HARPER   3/23/2017   38 B	

## 5. OPTIONAL:

- To search for other fields and narrow your search, select



**Add Additional Criteria.**

- To remove a search criteria field, select



next to a search criteria.

- To clear all fields and your search results, select **Clear Search Entries**.
- To display or hide all search criteria fields, select **Show Criteria** or **Hide Criteria** respectively.
- To search for terms in a specific language, select a language from



- By default, iManage Work displays the search results in the Personalized tab. This tab filters your results to display any content you've accessed in the past 30 days. To display all search results, select the **All** tab.

## NOTES:

- Keyword and Number searches allow multiple values separated by a comma.
- You can add a combination of logical operators (AND, OR, NOT) in one option (for example, Keyword > Anywhere > Contains > apple NOT Samsung), or progressively use multiple options (for example, Keyword > Anywhere > Contains > apple and Keyword > Anywhere > Does Not Contain > Samsung), and the result is the same.

## Advanced Search options and examples

To refine the search entries and get accurate search results, the Advanced Search feature provides various options applicable to different search fields. Some of the important options are explained in this section.

**In this section:**

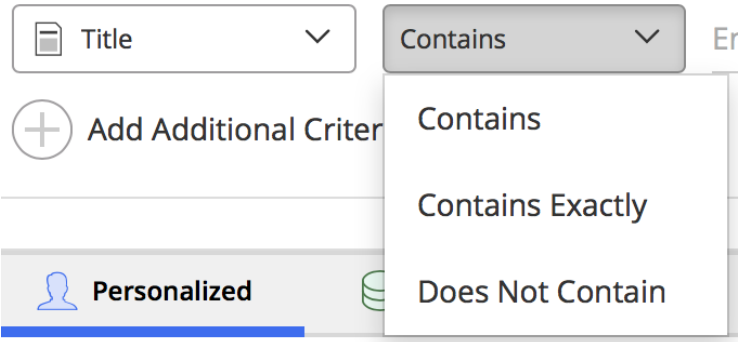
- [Advanced Search options available under Title, Keyword, Subject, and Description](#)
- [Additional Advanced Search options available under Keyword](#)
- [Advanced Search options available under Doc. Number](#)
- [Advanced Search options available under Date fields](#)
- [Fields for refining your searches](#)

**Advanced Search options available under Title, Keyword, Subject, and Description**

The following Advanced Search options are available under Title, Keyword, Subject, and Description:

- Contains (stemming applicable)
- Contains Exactly (stemming applicable for Keyword searches)
- Does Not Contain

**Figure: Advanced Search menu**



You can use a combination of one or more of these options, for any number of times, to refine your results.

**Examples:**

- Contains and Does Not Contain (NOT Operator)
- Contains and Contains Exactly (AND Operator)
- Contains, Does Not Contain, and Does Not Contain

The following table shows behaviors and examples for each of these search options.

SEARCH OPTION	SEARCH DESCRIPTION	EXAMPLE(S)

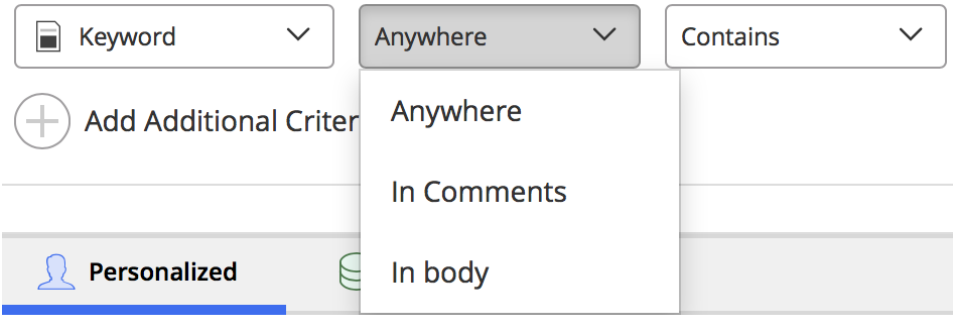
Contains (stemming applicable)	
Documents/Emails/Matters containing the term or variations of the term are returned in the search results. If you search for the term <b>credit</b> in the <b>Title</b> drop-down and select the <b>Contains</b> option, the system returns all the documents that contain the term or its variation in the title of the documents.	
Input: <b>Credit</b> Output: <b>Credit Agreement with A&amp;G</b> and <b>Revolving Facilities Agreement with Creditor</b>	
Contains Exactly	
Documents/Emails/Matters containing the exact term or phrase are returned in the search results. If you search for the term <b>Credit Agreement</b> in the <b>Title</b> drop-down and select the <b>Contains Exactly</b> option, the system returns all the documents that contain the term/phrase in the title of the documents.	
Input: <b>Credit Agreement</b> Output: <b>Credit Agreement with A&amp;G</b>	
Does Not Contain	
Documents/Emails/Matters containing these terms are excluded from the search results.	
Input: <b>Credit</b> Output: Every document that doesn't have the term <b>credit</b>	

Additional Advanced Search options available under Keyword

The following additional Advanced Search options are available under Keyword:

- Anywhere
- In Comments
- In body

Figure: Advanced Search menu



The following table shows behaviors and examples for each of these search options.





Is

The document returned exactly matches the document number entered. If you search for the number **45678** and select the **Is** option, the system returns the documents whose ID is 45678. You can search for more than one document by entering comma-separated document numbers.

**NOTE:** Document numbers themselves must be entered without any commas.

Input: **45678**

Output: Document Number **45678**

Between

The documents with numbers falling between the specified document numbers are returned. If you're searching for documents within a range, enter the document numbers within the range you want to search, and select **Between**. The system returns documents falling between those numbers.

Input: **45678** and **45690**

Output: All documents from **45679** to **45689** are returned

Before

The documents with numbers before the entered document numbers are returned. If you search for documents with document numbers falling before the entered number, enter the document number, and select the **Before** option. The system returns the documents falling before the specified number.

Input: **45678**

Output: Documents with numbers < **45678**

After

The documents with numbers later than the entered document numbers are returned. If you search for documents with document numbers falling after the entered number, enter the document number and select the **After** option. The system returns the documents falling after the specified number.

Input: **45678**

Output: Documents with numbers > **4567**

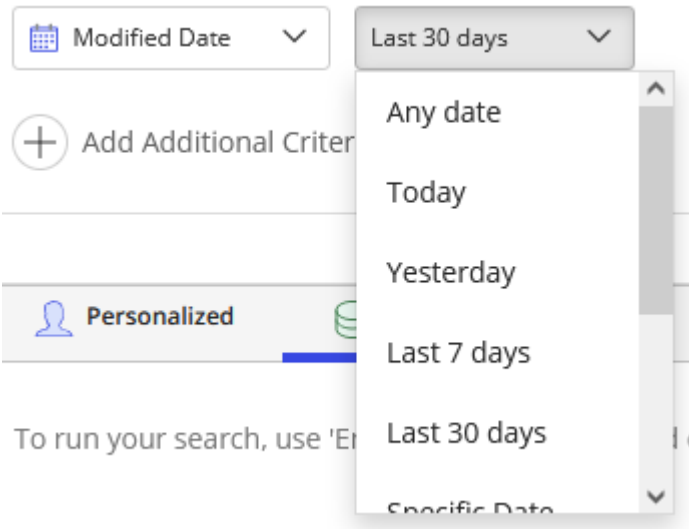
## Advanced Search options available for Date fields

The following Advanced Search options are available under Date fields:

- Any date
- Today
- Yesterday

- Last 7 days
- Last 30 days
- Specific Date
- Before...
- After...
- Between

Figure: Advanced Search menu



You can use a combination of one or more of these options, for any number of times, to refine your results.

Examples:

- Created Date
- Modified Date
- Date Sent
- Date Received

The following table shows behaviors and examples for each of these search options.

SEARCH OPTION	SEARCH DESCRIPTION	EXAMPLE(S)
Any date	Based on the field selected—for example, Created Date—the system returns all documents created, regardless of the date.	

Input: No additional selection is required  
Output: All documents created

Today

Based on the field selected—for example, Created Date—the system returns all documents created on the current date (today).

Input: No additional selection is required  
Output: Documents created on the current date

Yesterday

Based on the field selected—for example, Created Date—the system returns all documents created on the previous day's date (yesterday).

Input: No additional selection is required  
Output: Documents created on the previous date

Last 7 days

Based on the field selected—for example, Created Date—the system returns all documents created over the last seven days, starting from the current date.

Input: No additional selection is required  
Output: Documents created over the last 7 days, starting from the current date

Last 30 days

Based on the field selected—for example, Created Date—the system returns all documents created over the last 30 days, starting from the current date.

Input: No additional selection is required  
Output: Documents created over the last 30 days, starting from the current date

Specific Date

Based on the field selected—for example, Created Date—the system returns all documents created on a specified date.

Input: **1/16/2019**  
Output: Documents created on the selected date

Before...	
Based on the field selected—for example, Created Date—the system returns all documents created before the specified date.	
Input: <b>01/16/2019</b> Output: Documents created before <b>1/16/2019</b>	
After...	
Based on the field selected—for example, Created Date—the system returns all documents created after the specified date.	
Input: <b>01/16/2019</b> Output: Documents created after <b>01/16/2019</b>	
Between	
Based on the field selected— or example, Created Date—the system returns all documents created between the specified dates (including the specified dates).	
Input: <b>02/08/2018 &amp; 10/10/2018</b> Output: Documents created within the specified dates (including the dates)	

## Fields for refining your searches

You can use validated fields to refine your search.

### Examples:

- Author
- Operator
- Type
- Document Status

### Figure: Advanced Search menu

Document Stat... ▾

Type ▾

Title ▾

Enter/Select Document Status

Draft  
DRAFT

Final  
FINAL

The following table shows behavior and an example for this search option.

SEARCH OPTION	SEARCH DESCRIPTION	EXAMPLE(S)
Validated fields	These are drop-down lists displaying the values that you can choose from. Based on the value selected, the system returns all the related documents.	
Input: <b>Draft</b> Output: Documents in <b>Draft</b> status		

You can also use validated fields (parent-child relationship) to refine your search.

Examples:

- Client and Matter
- Practice and Subpractice
- Customer ID and Account ID

Figure: Advanced Search menu

Client ▾

00000002 | China Construction Bank X

Matter ▾

Enter/Select Matter

Client General Workspace  
L-000002

China Construction Bank vs Adell Engineering Litigat  
L-000211

Project Anat  
L-000419

Bernadette Adkins Employment Agreement  
L-000623

Clear Se

+

Add Additional Criteria

Hide Criteria ^

Personalized

All

The following table shows behavior and an example for this search option.

SEARCH OPTION	SEARCH DESCRIPTION	EXAMPLE(S)
Validated fields (parent-child relationship)	<p>These fields are drop-down lists displaying the values that you can choose from. When you select a value from the parent, the values for the child are automatically updated.</p> <p><b>Example:</b> Based on the client selected, the list of matters for this client are automatically filtered in the Matter drop-down list.</p>	
Input: <b>Enron Corporation (001)</b> Output: Documents associated with the specified account ID		

You can also use Boolean fields to refine your results.

Figure: Advanced Search menu



The following table shows behavior and an example for this search option.

SEARCH OPTION	SEARCH DESCRIPTION	EXAMPLE(S)
Boolean fields	<p>If your instance of iManage Work is configured for fields that accept Boolean fields, then based on your selected response, the system returns all the related documents based on your select response.</p> <p><b>Example:</b> If the field is configured as <b>Is Billable?</b>, the system returns all documents that aren't billable when you specify <b>No</b> in your search criteria for this field.</p>	
Input: <b>No</b> Output: Documents conforming to your selection		

# Types of searches in iManage Work

## In this section:

- [Full-text search](#)
  - [Exact match search \(exact word or exact phrase\)](#)
  - [Searching for alphanumeric strings](#)
- [Handling special characters in a search](#)
- [Language-specific search](#)
- [Wildcard search](#)
- [Boolean operator search](#)
- [Stemming](#)
- [Stop words](#)

## Full-text search

iManage Work automatically performs a full-text search. That is, it returns documents and emails that contain each search term, as well as variations, in any order.

### Exact match search (exact word or exact phrase)

To perform an exact match search, you must:

- Use the Advanced Search to perform an exact match search, or
- Enter a search term in double quotes (") using simple search, for example, "**lease agreement.**"

To perform an exact match search, the search string shouldn't break on any characters, including spaces. Some examples of such search strings are GSMITH-23, PDF Document, and an\_underscore. The terms are case insensitive, so GSMITH-23 and gsmith-23 mean the same.

Exact match search applies to these fields:

- Class
- Author
- defaultSecurity
- docType
- inUseBy
- message From/to/cc/bcc
- operator
- prjDocType
- Subclass

## Contains Exactly option

Select **Contains Exactly** in the search drop-down options if you want to execute a search for the exact term or phrase in Advanced Search. Selecting this option cancels out wildcards, special characters, and other search

operators (for example, AND, OR) that impact the search results. This option ensures that the search returns an exact match of the term(s).

When you select the **Contains Exactly** option for Title searches, iManage Work searches for instances of that exact term without stemming it. For example, a normal Title search for **help** where the selected option is **Contains** returns documents that contain the words **helps**, **helpful**, and **helping**. However, a Title search for **help** with the **Contains Exactly** option selected returns documents only with the exact term **help** in the Title. A Keyword search for **credit agreement** where the selected option is **Contains** returns documents with variations of the root term for each word. That means that the search returns documents with **credit** as well as **credits** and **credited**. Likewise, **agreement** returns **agreements** or even **agree**. The words will be found in any order.

A keyword search for **credit agreement** with the **Contains Exactly** option selected returns only documents that contain the phrase **credit agreement** in the order you typed it. However, stemmed variations are also returned.

#### NOTES:

- Searching for an exact match within double quotes isn't supported for clients.
- In addition to the Keyword field, the Description field, and the document content, non-validated custom text fields are also treated as full-text fields in a search.

## Searching for alphanumeric strings

The goal of any search is to find a particular document or set of documents. The more specific the criteria, the greater the likelihood of quick and accurate results. Therefore, often search terms aren't real words, but are codes or numbers that represent clients, or numbers representing client or customer IDs, dates, invoices, and similar identifiers.

When searching for numbers or alphanumeric terms in iManage Work, please keep the following in mind:

### 1. Searching the Description and custom profile fields

- It's possible to search for numbers or alphanumeric terms that are up to 255 characters long.
- If the search term is for the exact number or alphanumeric term, you don't need to select **Contains Exactly** or add wildcards to return the document.  
For example—If you were searching for a document with the title "Invoice #553739", then a Description search for **553739** would return that document.
- If the search term only contains a part of the number or alphanumeric term, then wildcards are necessary to obtain a result.  
For example—If you were searching for a document with the title "Style 2020", but only knew the first 5 letters of the invoice, you'd use a search for **Style\*** to retrieve documents with terms in the title that begin with "Style", including "Style 2020."
- When searching for dates in full-text, keep in mind that special characters are treated differently depending on whether the selected option is **Contains** or **Contains Exactly**.



For example—A Contains search for **10/29/07** is actually interpreted as a search for 10 AND 29 AND 07 and returns documents having all of these three numbers in any order. Consequently, the best practice when searching for dates in full-text is to select **Contains Exactly**. This yields the best search results. For instance, a search for **10/29/07** with the **Contains Exactly** option selected returns documents with the exact date 10/29/07. However, because the slash is a special character, the search also returns documents with **10 29 07**, **10.29.07**, and **10-29-07**.

## 2. Searching in the document content

- The rules for searching for numbers or alphanumeric terms in the document content (that is, the actual document text) is the same as those mentioned above for the Description field.

# Handling special characters in a search

When conducting full-text searches against the profile metadata or the document content, it's important to understand how special characters are interpreted in the context of the search. Special characters are non-alphanumeric characters, such as punctuation marks.

The following characters have special meaning within the context of a search and can be used as follows:

- Wildcards (\* and ?). Refer to [Using wildcards for a search](#).
- Parentheses ( ) are used to build complex nested queries.  
**Example:** A search for **Jeff AND John AND (Ryan OR Steve)** returns documents containing **Jeff, John**, and **Ryan** as well as documents containing **Jeff, John**, and **Steve**.

The following special characters behave differently within a search depending on whether the search term is a phrase search (which is enclosed in quotation marks) and whether the special character is separated from the search term(s) by spaces or other special characters:

~ ! @ # \$ % ^ & \* ( ) \_ + { } | \ : ; < > = - \_ ? , . /

- Special characters in a phrase search are ignored when searching in iManage Work. As a general rule, all special characters (including \* and ?) are essentially treated the same as spaces between words. When executing a phrase search that includes a special character in the phrase, that character is ignored. For example—a search for **self-evaluation** with the **Contains Exactly** option selected returns documents with **self-evaluation** as well as **self evaluation**, **self - evaluation**, **self--evaluation**, and **self\evaluation**, and so on.
- Special characters included in a search term without interceding spaces or quotation marks are interpreted as an AND operator. For example—A search for the term **self-evaluation** is the equivalent of a search for **self AND evaluation**.

So a search for self-evaluation returns documents containing self and evaluation (and their stemmed variants).

## Language-specific search

iManage Work allows you to search for terms in English, Spanish, Chinese, Japanese, German, and French.

Select the



drop-down menu in the Advanced Search window to search for terms in a different language.

The screenshot shows the 'Advanced Search' window. At the top, there are tabs for 'Documents', 'Emails', 'Docs & Emails', 'Matters', and 'Folders'. Below these, the 'Search Scope' is set to 'ACTIVE, REACTIVE'. A language selection dropdown menu is open, showing options: 'All', 'EN English', 'ES Spanish', 'ZH Chinese', 'JA Japanese', 'DE German', and 'FR French'. The search criteria section includes fields for 'Title', 'Keyword', 'Modified Date', and 'Type', each with a dropdown menu and a search scope dropdown. The 'Contains' dropdown is also visible. At the bottom, there are buttons for 'Add Additional Criteria', 'Clear Search Entries', 'Save as Search Folder', and 'Search'.

## Wildcard search

There are two wildcard characters—the question mark (?) and asterisk (\*)—that are supported for Title, Keyword, and workspace searches.

**NOTE:** Wildcards aren't supported in either the first or second positions of any search term. For example, **\*oat** or **?oat** or **R?chman** are invalid search terms.

- **Question mark (?):** Use this character as a wildcard in place of a single unknown character. For example, if you're uncertain whether a name is Smith or Smyth, entering **Sm?th** returns documents that contain either name variation.
- **Asterisk (\*):** Use this character as a wildcard in place of any number of unknown characters. For example, a search for **ma\*or** returns all documents that contain words such as **major**, **mayor**, and **mentor**. Wildcards can be used starting with the third character of a search term. A search for **vert\*** returns documents that contain **vertical**, **vertigo**, and **vertebra**. Similarly, a search for **auto\*** matches the words **automobile**, **autograph**, and **autobiography**.

Wildcards are supported for the following:

- Title
- Custom Alias Field 1-12
- From, To, CC, BCC
- Attachment file names
- Comments

Escaped wildcard characters aren't supported. For example, **content:"Star\\*Airline"** is interpreted as a wildcard search.

Wildcards are treated as literals in these non-wildcard fields:

- Class
- Author
- Operator
- Owner
- Custom Alias Field 1-12
- Doc Type
- In Use By
- Last User
- Message ID
- NVPWSGUID
- Partially Processed Details
- Partially Processed Reason
- Predominant Language
- Subclass
- Type

**NOTE:** Many iManage apps, such as iManage Work 10 Web, resolve most of these fields through pick list fields, before the user executes the document search itself. So, there's no opportunity to use a wildcard for the document search.

## Boolean operator search

iManage Work allows you to search for combinations of terms using the Boolean operators described in the following table.

### NOTES:

- All Boolean operators, such as AND or NOT, must be in all uppercase.
- Don't place any part of the search term in quotes (") as an indication of priority. The system reads the order of the operators from left to right. Terms placed within () are read as one unit.

- Legacy IDOL search operators such as WNEAR aren't supported.

BOOLEAN OPERATOR	SEARCH DESCRIPTION	SEARCH RESULTS	APPLIES TO
AND	<p>Search for documents containing two specific terms in Title and Keyword searches.</p> <p>Requires both terms on either side (in either order) of the Boolean operator to be present for a match.</p> <p>The operator (AND) must be in uppercase.</p> <p>Input: <b>cat AND dog</b> Output: Documents that contain the terms <b>cat</b> and <b>dog</b></p> <p>Input: <b>Agreement AND Credit</b> Output: <b>Credit Agreement with A&amp;G</b> and <b>Revolving Facilities Agreement with Letter of Credit</b></p>		
	<ul style="list-style-type: none"><li>• Documents</li><li>• Emails</li><li>• Workspaces</li></ul>		
OR	<p>Search for documents that contain either (or both) of your search terms in Title and Keyword searches.</p> <p>Often used for looking for terms that have similar meanings or refer to similar subjects.</p> <p>The operator (OR) must be in uppercase.</p> <p>Input: <b>cat OR dog</b> Output: Only documents that contain either <b>cat</b>, <b>dog</b>, or both terms.</p> <p>Input: <b>Agreement OR Credit</b> Output: <b>Credit Card Payoff Plan</b>, <b>Credit Agreement with A&amp;G</b>, and <b>Mutual Agreement</b></p>		<ul style="list-style-type: none"><li>• Documents</li><li>• Emails</li><li>• Workspaces</li></ul>

**NOT**

Search for documents that exclude a specific term.

The operator (NOT) must be in uppercase.

Input: **cat NOT dog**Output: Only documents that contain **cat** and not **dog**.Input: **Agreement NOT Credit** (searching for documents that contain the term **Agreement** and not the term **Credit**.)Output: **Sales Agreement** and **Purchase Agreement**

- Documents
- Emails
- Workspaces

AND NOT  
OR NOT  
( )

Search for documents by a specific combination of inclusion and exclusion of terms.

The operators (AND NOT) and (OR NOT) must be in uppercase.

Don't place any part of the search term in quotations (") as an indication of priority. The system reads the order of the operators from left to right. Any terms placed within ( ) are read as one unit.

Input: **Agreement AND NOT Credit**Output: **Agreement with A&G Loan** and **Revolving Facilities Agreement Loan****NOTE:** Incorrect inputs are:

- "Agreement AND Loan" NOT Credit
- Agreement AND Loan NOT Credit

Input: **(Landlord OR Tenant) AND NOT guarantor**Output: **Landlord agreement; Tenant credit history**Input: **Landlord OR NOT (Tenant OR guarantor)**Output: **Landlord agreement with tenant; Tenant rental history with landlord**

- Documents
- Emails
- Workspaces

## NEAR NEARn

Search for documents where the search terms are within a specified **n** (a number) of words of each other; that is, the terms are **n** or fewer words apart in either direction.

If you don't specify **n**, it defaults to five. No maximum value is enforced, and the minimum is one.

The operator (NEAR) must be in uppercase.

Phrase proximity isn't being used with NEAR0.

Input: **red NEAR1 green**

Output: **red green; green red**

**NOTE:** Documents that contain **red orange green** don't return because the terms aren't close enough to each other.

Input: **Credit NEAR Agreement**

Output: **Credit Note and Revolving Facilities Agreement with Letter of Credit**

**NOTE:** **Agreement** appears five words after the first term **Credit**.

- Documents
- Emails
- Workspaces

## Stemming

Full-text searches in iManage Work return variations of the search term. This behavior is known as stemming.

Stemming is a sophisticated search technique where the search term is reduced to its base root to broaden the search to include terms that share the same root. For example, a search for **test** returns documents with **test** as well as **testing**, **tested**, and **tester**. However, the search doesn't return the word **testament**.

This process can broaden searches to include all variations of a term. iManage Work Search Service automatically stems the search term when it processes a search and returns variations of the search term.

## Stop words

To support precise content phrase searches, no stop words are used, by design. Stop words are common words that typically modify the meaning of other words but carry no inherent meaning themselves, such as adverbs, conjunctions, and prepositions.



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Sasha Angeli  
4 months ago



1

Ah of course - too used to having the docs to download :) One more question if I may - will this be updated to reflect the new search experience available in cloud?



Michael McAlpine  
4 months ago



1

I'd also appreciate an updated version!



Vidit Desai

1 month ago



0

Under "Wildcard search", Custom Alias Field 1-12 are listed as supporting wildcards, but in the next section they're listed under "non-wildcard fields". Is this a mistake in the documentation or am I misreading or misunderstanding what this means?



Michael McAlpine

24 days ago



0

Can you clarify what is meant by this passage about special characters? The description of the search results implies that they are treated as an OR, but that contradicts the first sentence and isn't how it works in practice.



**Special characters included in a search term without interceding spaces or quotation marks are interpreted as an AND operator. For example, a search for self-evaluation is the equivalent of a search for self AND evaluation.** Searches that include the OR operator return documents containing one or both terms on either side of the operator in any order. The search also returns stemmed variations of the terms. **So, a search for self-evaluation returns documents as follows:**

- Documents with selfonly (and variants such as selfish and selfless).
- Documents with evaluationonly (and variants such as evaluate and evaluations).
- Documents with both selfand evaluation (and the variants of each).



Louise Matthews

20 days ago



0

Hi Michael, thanks for pointing this out. This section had been updated internally but not yet published, we have corrected it now, please see above.





**Bill Coapman**

10 days ago



0



What is the point of limiting wildcards \* and ? to only work from the 3rd character on? If you had a description such as "Rev3Contract.doc", that someone might have saved just using the file name, then you could not search for "Contract" if that was all you knew and "\*Contract" would not be a valid search. Just searching Contract would not find it either without some kind of delimiters (space, -, \_., etc.). "Rev3\_Contract.doc" would be searchable as the \_ and . delimit the name. And yes, I realize it is bad form not to put in a better description, but users, it happens.

Otherwise good information on the search functions.



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### Head Office:

#### CHICAGO

71 S. Wacker Drive  
Suite 400  
Chicago, IL 60606

[View all of our locations](#)**MAIN:**

(312) 667-7000

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(312) 626-8822

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