Searching for Information

Search functionality in UMVibe enables you to accomplish the following tasks:

- Discover what information is available about a particular topic.
- Quickly navigate to a workspace, folder, or tagged item that you know exists in UMVibe.
- Locate a subject-matter expert.
- Locate a relevant workspace or folder.

The search fields/options are found to the far right of the Action Toolbar.

Using Basic Search

- Type the words or quoted phrases into the Search field, then either press Enter or click the Search icon (magnifying glass).
- UMVibe enables you to refine your basic search in the following ways:

<table>
<thead>
<tr>
<th>Search Capability</th>
<th>Function</th>
<th>Example</th>
</tr>
</thead>
</table>
| AND, OR, and NOT between two terms. | Search for UMVibe entries where two terms or phrases:  
- Both exist (AND)  
- Either exist (OR)  
- One exists but not the other (NOT) | Sales NOT figure searches for UMVibe entries that contain the term “Sales” but not the term “figure”. |
| Double quotation marks surrounding a phrase. | Groups words together to make a phrase. | “marketing meeting notes” |
| Field name followed by a colon, followed by brackets that contain a date range | Searches a specific field that contains values within a specific date range. | birthDate:{20070503* TO 20100608*} searches all entries whose birthDate field contains values greater than 5/3/2007 and less than 6/8/2010. Use curly brackets if you want to exclude the beginning and ending dates from the search, as in the above example. Or, use square brackets if you want to include the beginning and ending dates that you specify. For example, birthDate:[20070503* TO 20100608*] |
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**20100608** searches all entries whose birthDate field contains values of 5/3/2007 or greater and 6/8/2010 or less.

<table>
<thead>
<tr>
<th><strong>Asterisk (*) after word fragments.</strong></th>
<th>Searches for words that begin with the word fragment that you specify.</th>
<th>work* searches for words such as “workspace” and “workshop.”</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>You cannot put an asterisk before word fragments.</strong></td>
<td></td>
<td>*space does not search for words ending in “space,” such as “workspace.”</td>
</tr>
<tr>
<td><strong>Question mark (?) as a replacement for any single character.</strong></td>
<td>Replaces any single character in your search. You can use multiple question marks to replace multiple characters.</td>
<td>t??e returns all results containing the words “true,” “tree,” and so forth.</td>
</tr>
<tr>
<td><strong>Tilde (~) after a term.</strong></td>
<td>Searches for approximate matches for a single word.</td>
<td>Roam~ finds matches such as “foam” and “roams.”</td>
</tr>
<tr>
<td><strong>Tilde (~) after a group of words, followed by a number.</strong></td>
<td>Searches for instances of the words that you specify that are within a certain distance.</td>
<td>“Marketing notes”~5 searches for instances where the words “marketing” and “notes” appear within 5 words of each other.</td>
</tr>
<tr>
<td><strong>Caret (^) after a term.</strong></td>
<td>When you search for more than one word, using the caret (^) symbol after a word gives higher relevance to the word (entries with more occurrences of the term are displayed first in the search results). Adding a number after the caret symbol gives even higher relevance to the word. By default, the relevance factor is 1. For example sales is the same as sales^1.</td>
<td>sales^ figure finds matches for “sales” and “figure,” giving higher relevance to the term “sales” (entries with more occurrences of the term “sales” are displayed first in the search results). To give even higher relevance, sales^2 is higher than sales^, and sales^3 is higher than sales^2, and so forth. You can also give relevance to phrases. For example, “sales figure”^2 “marketing figure”</td>
</tr>
<tr>
<td><strong>Minus (-) before a word</strong></td>
<td>Excludes the word from the search</td>
<td>~tree excludes all items containing “tree,” “Tree,” “TREE,” and so on.</td>
</tr>
<tr>
<td><strong>Field name followed by a colon, followed by what you want to search for</strong></td>
<td>Searches a specific field. When searching a specific field, you must search on the data name of the field. Data names resemble the true names found in the interface. Fields you can search on are: _creationDate _creatorName _modificationDate _modificationName</td>
<td>title:meeting finds instances of the word “meeting” in the entry Title field. description:meeting finds instances of the word “meeting” in the entry Description field. emailAddress:jchavez* finds instances of “jchavez” in the Email Address field.</td>
</tr>
</tbody>
</table>

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Searching for Specific People, Places, or Tagged Items

To refine your search to include only people, places, or tags:

- Click the Search Options icon ( ).
- Select one of the following options:
  - People – Enables you to quickly navigate to a user’s personal workspace.
  - Places – Enables you to quickly navigate to any folder or workspace within Vibe. For example, if you want to locate a colleague’s Blog folder, simply type “blog”, then specify the name of your colleague. The appropriate place is listed in the drop-down list.
  - Tags – Enables you to locate any workspaces, folders, or entries that have been tagged. Specify the name of the tag that you are searching for, and click the name in the drop-down list. UMVibe displays all of the workspaces, folders, and entries that have been tagged with that particular tag.
- In the provided field, begin typing the name of the person, place, or tag that you are searching for. UMVibe applies type-to-find functionality. As you type, UMVibe lists items matching what you have typed so far (all items matching “d”, then all items matching “di,” for example).
- Click the name of the person, place, or tag when it appears in the drop-down list.
Using Advanced Search

Advanced Search enables you to narrow your search based on various criteria. To access Advanced Search:

- Click the **Search Options** icon (        ).
- Click **Advanced Search**.

- **Text** – Enter the specific text that you are searching for.
- **Places** – This section enables you to restrict your search to a particular place. Expand the tree by clicking the plus sign (+) next to the Home Workspace, then navigate to and select the workspace or folder that you want to search.
- **Search All Sub Places** – Searches everything below what you selected in the Workspace tree.
- **Search deleted items** – Search for items that have been deleted. The search returns only items that have been deleted.
- **Items Per Page** – Select how many results you want to display on each Search Results page.
- **Words Per Item** – Select the number of words to display for each search result.
- **Sort by** – Select how you want to sort your search results. You can sort search results by the following categories:
  - **Relevance**: The most relevant results are displayed at the top of the list.
  - **Date**: The results that were most recently added or modified are displayed at the top of the list.
  - **Rating**: Entries that have the highest rating are displayed at the top of the list.
  - **Reply Count**: Entries that have the most replies are displayed at the top of the list.
- **Sort by (secondary)** – Enables you to sort your search results by a secondary category.
Other Categories/Options

- **Authors** – Search for items based on the author.
- **Tags** – Search for items that are tagged, whether they are community or personal tags.
- **Workflow** – Search for items that have a particular workflow applied to them.
- **Entry Attribute** – Search for entries based on an element that the user selected in the entry, such as a select box or a radio button. For example, select Task Entry, then in the next field that appears, select Due Date. In the third field that appears, select a day to perform a search for all tasks due on that particular day.
- **Last Activity in Days** – Select to search for items that have been active in the last 1, 3, 7, 30, or 90 days.
- **Creation Dates** – Search for items based on when the items were created. In the fields provided, specify the start and end dates of the desired interval.
- **Modification Dates** – Search for items based on when the items were last modified. In the fields provided, specify the start and end dates of the desired interval.
- **Item Type** – Search the type of item you are searching for.

If your search requires more than one criterion, click **Add** and another field will become available. Click the X icon next to a criterion to remove it from the search.

**Saving and Reusing Searches**

UMVibe enables you to save searches so that you can reuse them in the future.

To save a search for later use:

- After you have performed a search that you want to save, click **View > Saved Searches** in the Action toolbar.
- The Saved Searches dialog box is displayed:

  ![Saved Searches Dialog Box](image)

  - In the **Manage Saved Searches** section, specify the name of the search that you want to save.
  - Click **Save** and then **Close**.

To access a saved search:

- Click the **Search Options** icon.
- In the **Saved Searches** drop-down list, click the saved search you want to access.