

Find Documents with ProjectWise Search

Although navigating through the ProjectWise folder structure to find documents is not difficult, it may be faster and easier to use the powerful search tools in ProjectWise to locate the information you need. Using metadata (attributes), contents of documents, as well as file names can help find documents that can be scattered across the folder structure.

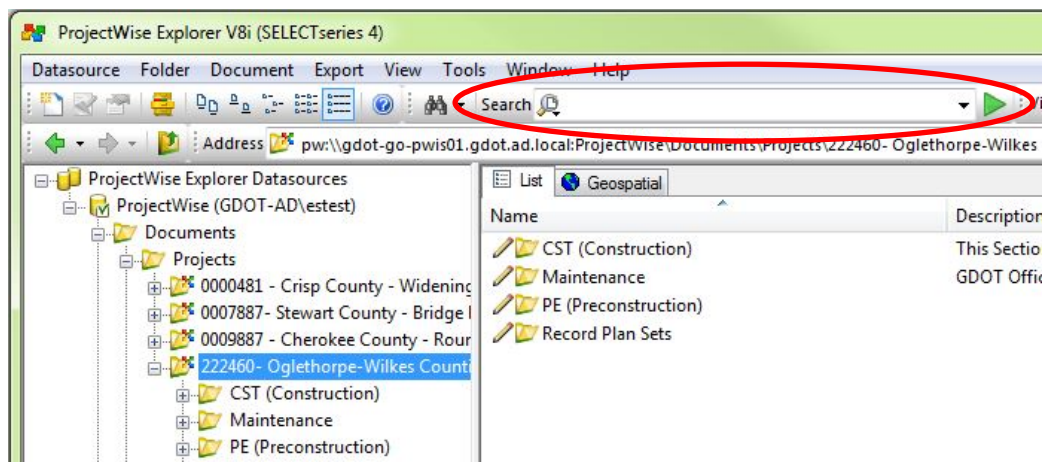
There are 3 methods to search for documents in ProjectWise:

- Quick Search Bar
- Search by Form
- Search Builder


Each of these methods has distinct reasons for their use. They vary in complexity in how the criteria for the search are defined.

Quick Search Bar

The Quick Search Bar works much like a Google search. By default, it will search in the location you have selected in the left panel.



Type in the terms you wish to search for in the Search Bar area and either press **Enter** or click the **green arrow**. Clicking the small down arrow on the right end of the bar will display your previous searches.

 The **magnifying glass icon** on the left end of the bar lets you determine the content that is searched in the selected location. **Full Text Search** is the default, which searches all content except the document metadata (attributes). Selecting **All Content** will include the metadata in the search. The Settings option is described later which is used to create search types that are used as favorites.

You can further refine your search by using expressions and symbols.

“ ” If you type in **Concept Report** in the Quick Search Bar, the results will contain both the terms Concept and Report, but not necessarily together in a phrase. To assure that the results have found the exact phrase as typed, enclose it in double quotes, i.e. **“Concept Report”**.

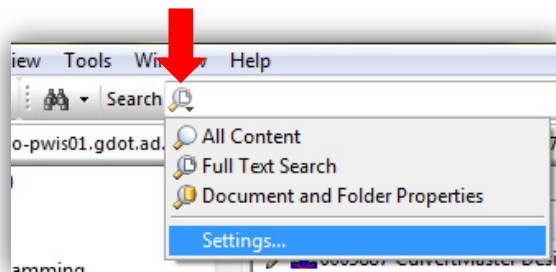
asterisk (*) Used for wildcards. The symbol stands in place of multiple letters. For instance, to search for all MicroStation DGN files, use ***.dgn** in the Quick Search Bar.

- and** This expression is implied when a space is used in the Quick Search Bar. You can still use **and** to refine your search, i.e. **site and *.pdf**. This is used to combine more than one criterion in your search. Search results will display documents where **BOTH** search terms are present.
- or** This expression is similar in use as the *and* expression above except the search results will display documents where **EITHER** of the search terms are present, i.e. ***report* or *schedule***. This is a wider search than using the *and* expression.
- not** Use this expression if you want one term and **not** the other in the results, i.e. ***.dgn not *.cov***. This helps reduce the search results.

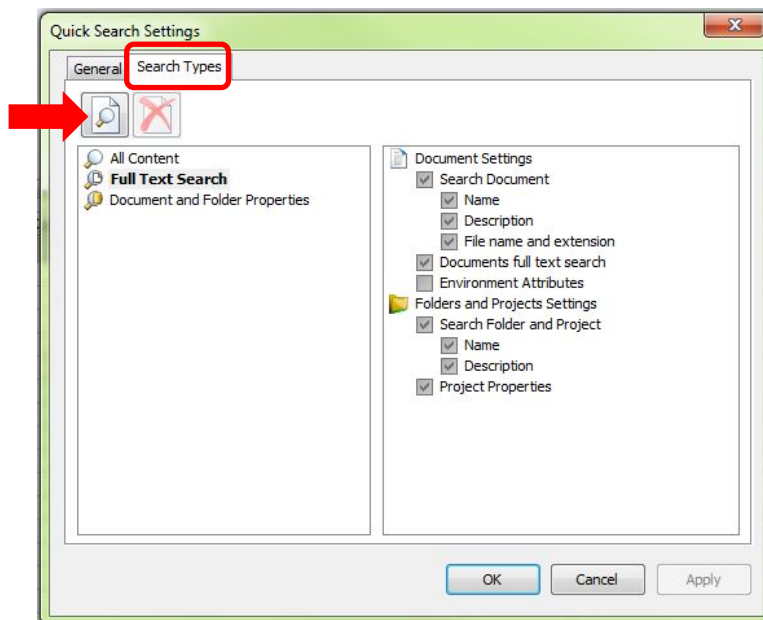
Favorite Quick Searches can be saved for easy access in ProjectWise Explorer. These are unique to your profile on your computer so you must create them in order to use them.

A good example for a useful quick search would be to find a PI Number in the list of projects stored in ProjectWise. Since all active PI Numbered projects are stored in ProjectWise, locating one in the list quickly may be time consuming on a daily basis. A saved Quick Search that lets you enter the PI Number in the search field to locate the project folder makes this task quick and easy.

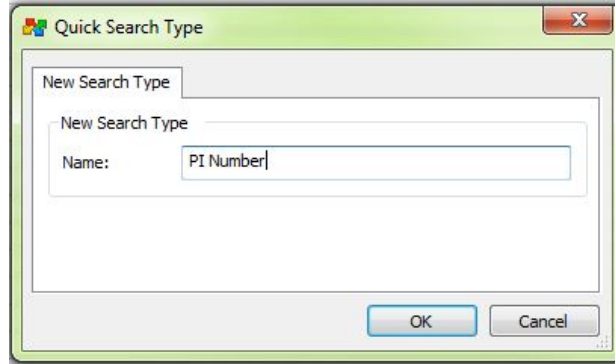
To create a new favorite Quick Search, click on the **magnifying glass icon** in the Search Bar and select **Settings**.



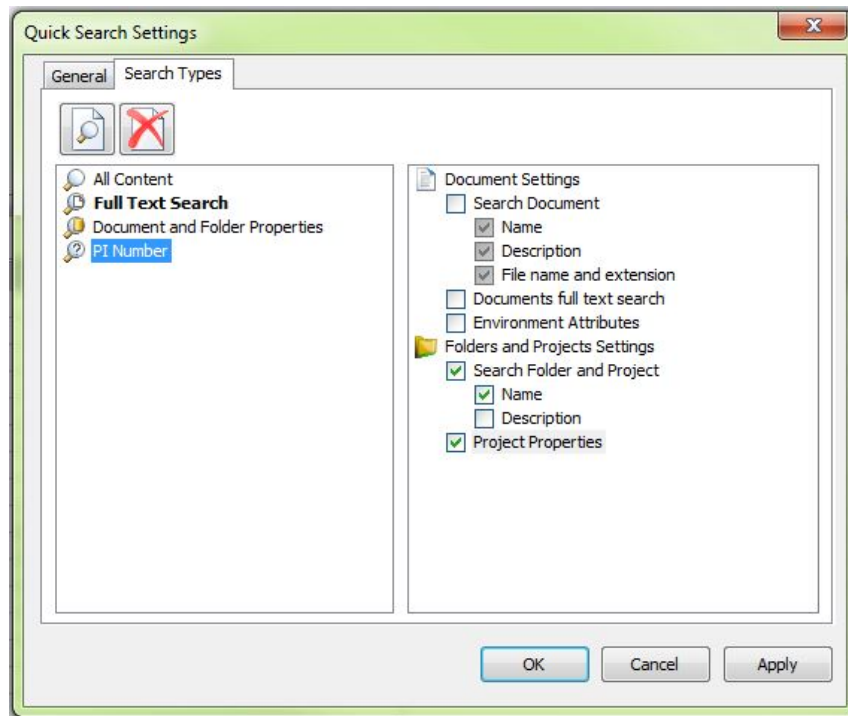
In the Quick Search Settings window that displays, select the **Search Types** tab and click the **New Search Type** icon.



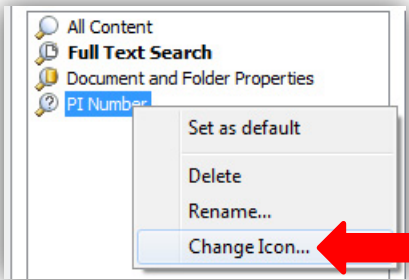
Enter a name for the new search in the pop up window, such as *PI Number*. Click **OK**.



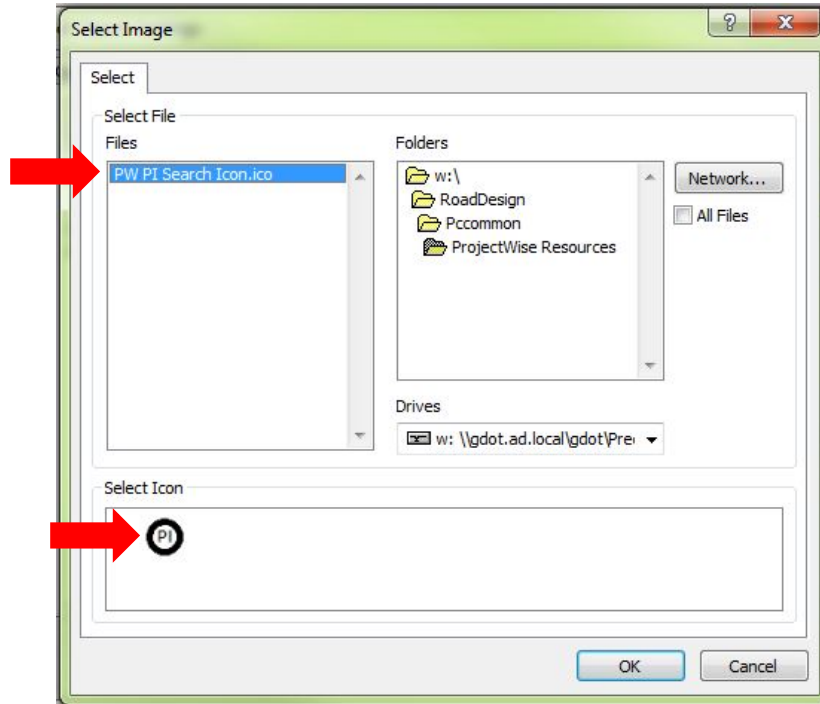
With the new Quick Search name selected in the left panel, make appropriate selections for your search in the right panel. For the *PI Number* search, uncheck **Search Document** and check **Search Folder and Project** along with **Name** and **Project Properties** as seen in the image below.



You can set an icon for the Quick Search to make it easy to find in the list. Right click on the Search name in the left panel and select **Change Icon**.

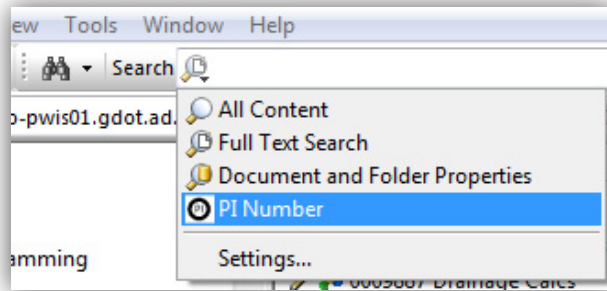


An icon has been created for your use for the *PI Number* example. Browse to **Pccommon** in the **Select Image** window and locate the **ProjectWise Resources** folder. Select the **PW PI Search Icon.ico** file and then click on the icon itself in the **Select Icon** area, then click **OK**.



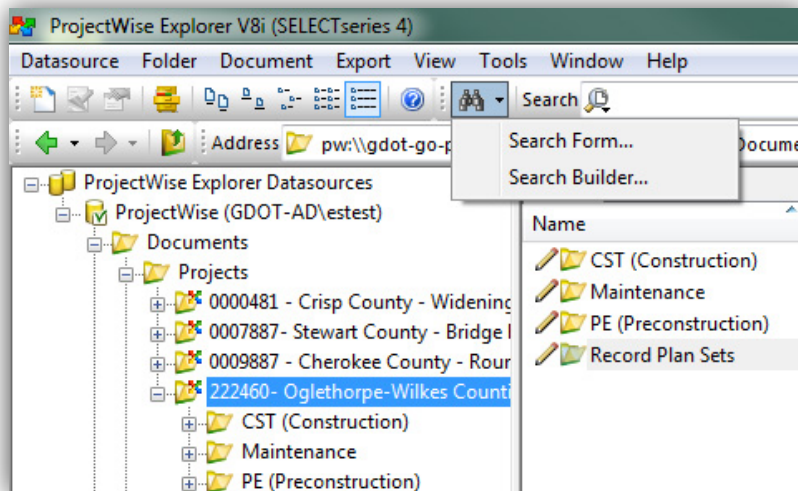
Click **OK** to exit the Quick Search Settings window.

You can now find and use your new Quick Search favorite by clicking the magnifying glass icon in the Search Bar and selecting **PI Number**. Enter the desired PI Number in the search bar to find your desired project.

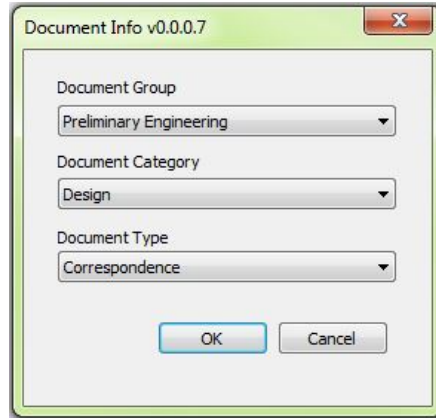


Complex Searching

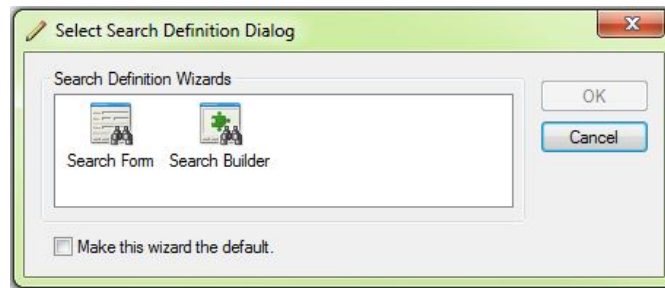
For more advanced searching, click on the **binoculars** icon. You will be provided with two options: **Search by Form** and **Search Builder**. You may also use the drop down arrow next to the binoculars to select one of the search options. Choosing the advanced search in these ways will search across the entire ProjectWise datasource. Right clicking on a folder in the left panel gives you the option to select **Advanced Search** which again provides the same two search options, but will automatically limit the search to the location selected.



If you clicked on the binoculars or used the right-click menu, you will be prompted to select a **Document Group**, **Document Category**, and **Document Type**. This selection will assure that the correct attributes will be displayed in the Search by Form tool. For more information on the Document Info utility, see the [Working with Documents in ProjectWise](#) training document.

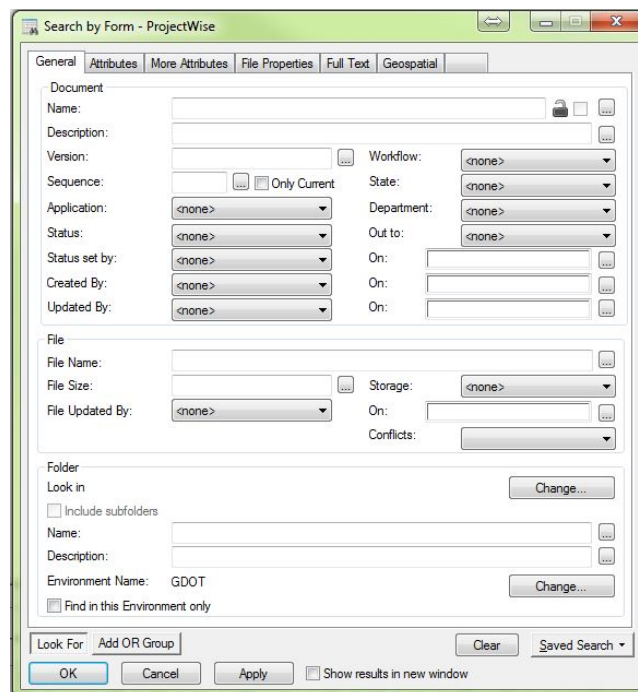


Next you will see a window allowing you to select one of the two Search Definition Wizards.



Search by Form

This wizard has the same look as the document properties window. All of the properties that are seen in the properties window are searchable using this form. The six tabs across the top break down the search criteria into General data, Attributes, File Properties, Full Text and Geospatial.



The **General** Tab lists document, file and folder information. Wildcards and other expressions listed under the Quick Search Bar topic can also be used in this form. There are drop down fields for pick lists and buttons for specifying date ranges to make specifying criteria easier. The folder area at the bottom lets you define what location to search.

The **Attributes** and **More Attributes** tabs display the GDOT specific metadata. This can include both project and document properties.

The **File Properties** tab allows you to select properties that you would normally see as file properties in Windows Explorer. You have access to many additional properties such as mail message information.

The **Full Text** tab lets you specify terms contained within document contents that need to be included in the search.

The **Geospatial** tab is not to be used at this time. Future enhancements to ProjectWise will include expanding the use of GIS to find documents in the system.

Search Builder

This wizard allows you to define multiple criteria based upon selected properties and attributes using expressions to limit the results.

The screenshot shows the 'Define Search' dialog box. At the top, the title bar reads 'Define Search - <new search>'. Below the title bar, there is a 'Search' section with two dropdown menus: 'Look for:' set to 'Documents' and 'View:' set to '<default>'. Below this is a large empty rectangular area labeled 'Find documents that match these criteria'. Underneath this area is a section labeled 'OR Group (1)' with a text input field containing 'GDOT'. Below that is the 'Define criteria' section, which includes three dropdown menus for 'Criterion Type:', 'Property:', and 'Attribute:'. Below these is a 'Value:' input field with an ellipsis button to its right. To the right of the 'Value:' field are two buttons: 'Add Criteria' and 'Add OR Group'. At the bottom of the dialog, there is a 'Saved Search' dropdown menu, and three buttons: 'OK', 'Cancel', and 'Apply'.

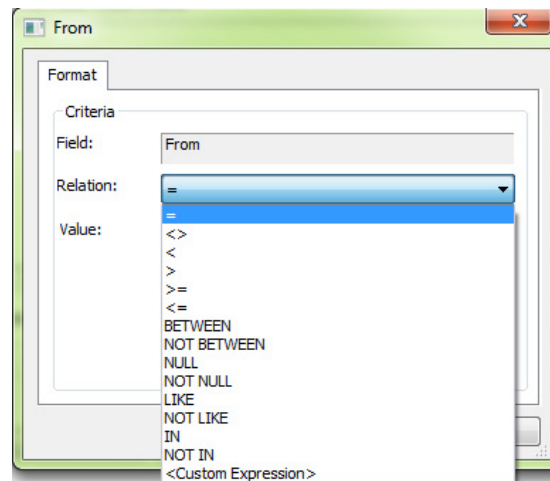
The **Look for:** drop down list at the top determines whether the search will look for *documents* or *projects and folders*.

The area in the middle will display each line of the defined criteria once they are created using the fields in the Define Criteria area.

The **Define Criteria** area lets you set the values for certain properties that will be used in the search. The options will vary depending on if *documents* or *projects and folders* are chosen. In the **Criterion Type** list, choose from General Properties, Full Text, File Properties, Project Properties, or Environment

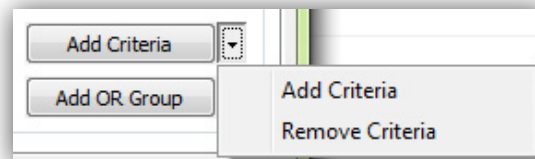
Properties. The two selection fields to the right of Criterion Type will change depending on the previous selection.

Once the Criterion is set, you need to choose what the **Value** is for that criterion that will satisfy your search. A drop-down list may be available depending on the previous selections. The “...” button to the right will allow you to use relational expressions to further include or exclude possible results.



Once the criteria and value has been set, click **Add Criteria**. You may then create another criterion set by going through the same process and clicking Add Criteria again. These additional criteria are seen as a string of statements connected by **AND**.

You can remove any criteria by selecting it in the list and clicking the arrow next to Add Criteria and picking **Remove Criteria**.



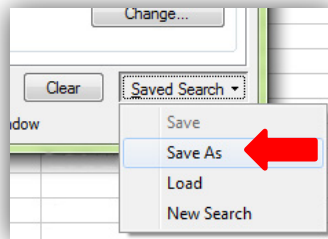
When all the criteria have been set, select **OK** to display the search results.

Saving Searches

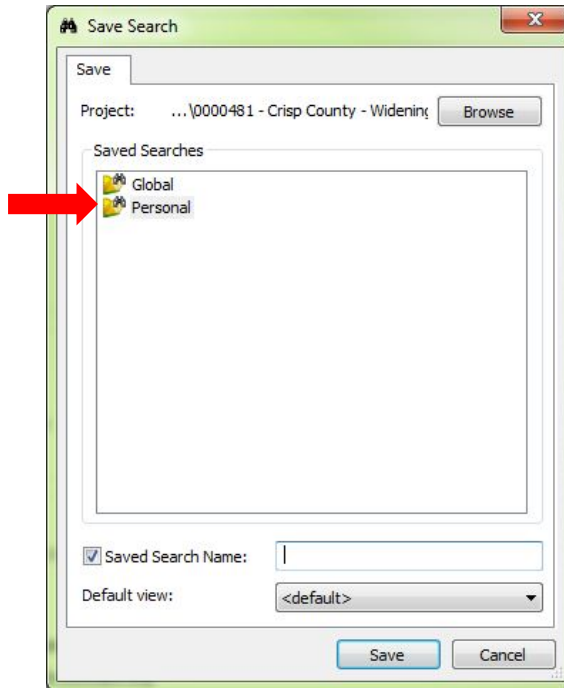
Creating a complex search takes time and may need to be reused. Both the Search by Form and Search Builder wizards allow you to save your search definitions for future use. Searches can be saved under a project or outside of a project. This location does not impact the actual search location – that is defined within the search definition itself.

To save a search:

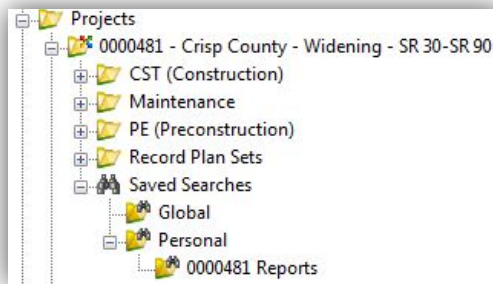
- Click on the **Saved Search** button at the bottom of the wizard window.
- Choose **Save As**.



- The Default location for the saved search is ROOT which means it is outside of a specific project. If you wish to save the search within a project folder structure, click **Browse** and choose the appropriate project.
- Select **Personal** in the folder list.



- Create a name for the saved search in the field next to **Saved Search Name**.
- Click **Save**.
- You will then see your saved search within ProjectWise Explorer under the **Saved Searches** folder. The saved search will reside in either the Saved Searches folder directly under the ProjectWise datasource if the ROOT location was chosen, or under the project folder if that was specified during the saving process.



- To run the Saved Search in future sessions, navigate to the Saved Search Folder and click on the desired Search.