INTRAFIND

iFinder User Manual

User documentation

Version 5.4.1

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1 Introduction

Searching with iFinder5 finds documents from various data sources and of various types. Possible data sources can for example be file systems and Web sites.

> Search is configured and integrated individually for your company, for example into the enterprise portal. Thus, some of the features described here may differ from your integration.

Target group

- Users searching with iFinder5

Scope

- Standard features for searching with iFinder5

This documentation is available here:

- In the online help of the software

- At www.extranet.intrafind.de/ifinder

iFinder as stand-alone component
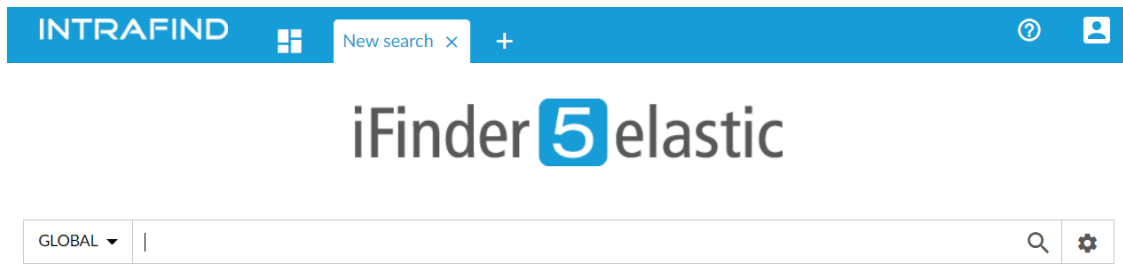
Searchbar as integration component

iFinder Confluence Search

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Accessible iFinder version

| iFinder 5 | intrafind | suchen | Vorschläge | Filter anzeigen | | A- | 14 | A+ |

Treffer 36000

INTRAFIND
Dateisystem

Öffnen

/media/shares/Sales/1-Marketing/08-Events/01 Events/Archiv/2012/01_März 2012 - CeBIT, Hannover/Werbedisplay/INTRAFIND_v2.pdf

www.intrafind.de » » » Machen Sie mehr aus Ihrem Content ... Enterprise Search Tagging & Metadatenerzeugung Search-Based Applications

The accessible version provides the most important options of iFinder in a easily accessible and usable version: Accessible iFinder version

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2   Searching

Enter a search term and press the **Enter** key or click the **Search** button to start searching.

GLOBAL ▼ | search term   ✕ 🔍 ⚙
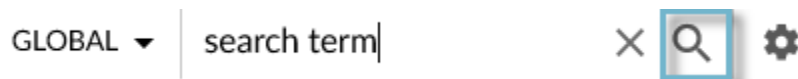
2.1   How does searching work?

2.1.1   Simple search

1. Enter a search term.
   For a quick overview of the documents, for which you have read permissions, you can enter an asterisk * instead of a search term.

2. Start search with the **Enter** key or click on **Search** 🔍.

2.1.2   Support when entering the search term

- Proposals are displayed.

- Last searches are displayed (optional).

- Documents are proposed that match the currently entered search term.

- After an unsuccessful search, for example because of a typo, a correction is suggested.

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2.1.3   Accepting a proposed search term

1. Click on the proposal that you want to use, or navigate to the proposal using the arrow keys, and press the **Enter** key.

2. Search is performed for the proposed search term.

2.1.4   Displaying the proposed document

- To show the preview, click on **Preview**.

- To open the document, click on it.

2.1.5   Accepting a suggested correction

1. After an unsuccessful search, a correction is suggested.

ecnomy returned no results.

Did you mean:

🔍 economy

2. Click on the correction proposal.

3. Hits for the proposed search term are displayed.

2.1.6   Searching with a search profile

A search profile defines amongst others the search scope. Typically, you search with the **Global** search profile which includes all search scopes. But you can restrict your search for example to documents from the file system or to persons.

1. To search only within a specific search scope, select the appropriate search profile to the left.

Global ▾   🔍   ⚙

2. Enter a search term.

3. Start search with the Enter key or click on **Search** 🔍.

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2.2 What do I find?

When entering more than one search term, the terms are linked with a logical AND.

Enter	To find documents	Search technology
Knowledge Retrieval **Knowledge AND Retrieval**	… containing all terms	With boolean operators
Knowledge OR Retrieval	… containing at least one of the terms	With boolean operators
Windows NOT Mac	… containing the term "Windows" but not the term "Mac"	With boolean operators
Share*	… containing words words starting with "Share*", like "Sharepoint", "Shareware"	Wildcard search
Microsoft Share*	… containing "Microsoft" and additional words starting with "Share"	Wildcard search
book	… containing "book" within a word, like "bookstore", "bookseller" or "guestbook"	Linguistic search (optional)
sold	… containing variants of "sold" such as sell, selling. Depending on the configuration and for German only other variants may be found that go back to the same stem (verkauft, Verkauf, verkaufen)	Linguistic search (optional)
meier	… containing "meier" in any position within a word, like "Meierhöfer", "Obermeier" or "Obermeierhofen".	Wildcard search
meyer~	… containing "meyer" or with similar spelling like "meier", "meder" or "maier". Depending on the settings for fuzzy search, the results may differ. In this example, fuzzy search is used starting with the second character. In the default, it starts with the third character.	Fuzzy search
"yellow pages"	… containing this phrase	Searching for phrases
"Angela Merkel"~ 2	… containing Angela and Merkel with maximum two words between them, f. ex. Angela Dorothea Merkel	Distance search

For detailed information about search syntax and searching for field values, see Syntax for searching.

2.3 Performing search queries in parallel (optional)

After you have performed a search, you can leave the hit list open and perform another search on a new tab. The search query is used as the title of the tab.

Prerequisite

- The system is configured for performing search queries in parallel. In this case, predefined filters are not available.

To run a search in parallel:

1. Above the search input field, click on the ✛ plus icon.

2. Enter a search term.

3. Start to search with the Enter key or click on the icon:
   Perform search 🔍
   The result is displayed in a new hit list.

4. To return to a previous search, click the tab for that search.

2.4 Narrowing and extending the search request

2.4.1 Searching with a search profile

1. A search profile defines amongst others the search scope. Typically, you search with the **Global**, which includes all search scopes. But you can restrict your search for example to documents from the file system or to persons.

2. To search only within a specific search scope, select the appropriate search profile to the left.

3. Enter a search term.

4. Start searching with the **Enter** key or click on **Search** 🔍.

2.4.2 Searching for people (optional)

Prerequisites: The administrator has configured your system accordingly.

1. To search only for persons, select the **People** search profile to the left.

2. Enter the data for the person that you want to find. This can for example be the position, the department, the email address or a phone number.

3. Start search with the Enter key or click on **Search** 🔍.

4. Only persons that match this filter are displayed.

2.4.3 Performing a search with a filter (optional)

You can set a filter before searching. If you then perform the search, only hits that match this filter are displayed. You can also define more than on filter if the system is configured accordingly.

Prerequisites: The administrator has configured the filter option for at least one facet.
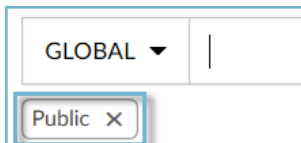
Searching with a search filter

1. Enter the name of the filter, for example the project name.

2. Filters corresponding to the input are displayed below the search field.

GLOBAL ▼	publi
▼ Public	

3. Click on the filter that you want to use.
   You can see that a filter is set.
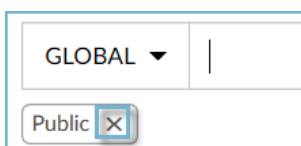
GLOBAL ▼		
Public ✕	

4. Enter a search term.

5. Start search with the **Enter** key or click on **Search** 🔍.

Deleting a search filter

- Below the search field you see the defined search filters. click on **x** for the filter to remove it.

GLOBAL ▼		
Public ✕	

- To remove all filters, click on **Remove filter** ▼ₓ [4] above the facets.

2.4.4 Searching for synonyms and translations (optional)

When typing the search term, synonyms and translations can be displayed.

Prerequisites: The administrator has configured your system accordingly and In the settings, you have enabled that synonyms and translations are displayed: Einstellungen für die Suche.

1. Start entering the search term.

2. Below the search field and the proposals, synonyms and translations are displayed.

3. Select the synonyms and translations that you want to include in the search.

4. The search expression is adapted accordingly.

Selected synonyms and translation with adapted search expression

2.4.5 Performing a field-based search (optional)

You can search in specific fields.

1. Click on the **Advanced Search** icon to the right of the search field:

2. In the **Field-based search** area enter search terms for one or more fields. It depends on the system configuration, which fields are displayed.

3. Click on **Apply & Search**.
    From your entries, a search query is generated and performed.

2.5 Search settings

You can change the search settings.

1. Click on the **Advanced Search** icon to the right of the search field:

2. Select the relevant option.

Settings ⑦

How accurate should the search term match?   **How far apart may the search terms be from each other?**   **Extended autocomplete**

● Exact match   ● Immediately next to each other   ☐ Synonyms
● Normalized characters   ● In the same sentence   ☐ Translations
● All word forms   ● In the same paragraph
● Multiword term   ● In the same document
○ Similar sound
○ Writing error tolerant (search syntax is not possible)

3. Click on the icon again to accept the changes and close the area.

> **Note**: The settings are valid for all subsequent searches as long as the search page is open. When you reopen the search page or the browser, the settings are changed back to the default.

2.5.1   How exactly should the search term match?

The more exactly the term must be matched, the less hits you get. Depending on the configuration, only a part of the options may be available. The lower option always includes the upper option. The number of hits increases the further down the option is.

- **Exact match (optional)**: The specified terms need to be exact matches in the document. So the system searches for exact occurrences. Example: *Handbuch* or Handbücher will have different hit lists.

- **Normalized characters**: Diacritics, like German Umlaut are normalized. The characters **ä** und **ae** will be treated the same (MODE/D).
  Example: Searching for *bücher* finds *bücher, buecher, Bücher, Buecher* but not *Buch*.

- **All word forms**: All inflection forms will be found as well as a variants of diacritics. (MODE/B)
  Beispiel: *go* also finds *went*.

- **Multi word term** (default): Also finds composed words that contain the search term as well as alle word forms and all variants of diacritics. (MODE/C).
  Example: *Bücher* finds: *bücher, Bücher, BÜCHER, Buecher, Buch, Kinderbuch*. *Handbook* also finds *book*.

- **Similar sound (optional)**: Also finds phonetically similar terms (MODE /P).
  Example: *Mayer* also finds *Maier* and *Meyer*.

As an **alternative** to these options, you can select that the search is performed in a **writing-error-tolerant** manner (fuzzy search with ~). You cannot combine the **Writing error tolerant** option with other options. It always includes the **Exact match** and **Normalized** options, but not the other options.
Example: *ecnomy* also finds *economy*. *probablity* also finds *probability*.

2.5.2   How far apart may the search terms be?

The nearer the terms must be to each other, the fewer hits you get.

- Immediately next to each other: Corresponds with the phrase search "Angela Merkel" with the difference that you do not need to enter quote marks and that proximity search is not possible.

- Within the same sentence

- Within the same paragraph

- Within the same document: The search terms are anywhere in the document. This setting is the default. If you use wildcards or field names in the search, you can only use this setting.

2.5.3   Additional proposals (optional):

You can define that **synonyms** and **translations** are proposed when entering the search term.

See also: Syntax for searching

2.6   Syntax for searching

When searching you can make use of an extensive search syntax and search in field values. Some of the options are also available in the search settings: Search settings.

> The extent to which the entries affect the search results depends on the configuration. The system can for example be configured in a way that no difference is made between upper and lower case when performing an exact search.

2.6.1   Search syntax

Operator	Function
AND +	Logical AND
OR	Logical OR
NOT -	Exclusion
*	Placeholder for any number of characters
?	Placeholder for exact one character
~	Fuzzy search
" "	Phrase search
[1 TO 10]	Range including boundary
{1 TO 10}	Range excluding boundary

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Logical operators

You can use the logical operators AND, OR and NOT to combine queries. The operators must be written in capital letters so that they are not interpreted as normal words in the search query. Partial requests can be grouped in parentheses.

Example: *(September OR November) AND invoice*

If no operator is specified between the words, a logical AND operation is used by default. For more complex logical expressions, you should always use full parentheses.

Alternatively, you can use the + and - operators before the search terms, where **+** is the AND operator and **-** is the NOT operator.

Example: *house -city +countryside*

Do not mix the two types of request with AND/OR/NOT and +/-.

> When searching with wildcards like an asterisk ***** or a question mark **?** or with the fuzzy search with a tilde **~** a timeout may occur or calculating the search result may be aborted. Narrow the search in the case.

Wildcard search

You can use the wildcard search to find documents where individual letters or the ending are unknown.

Syntax: t*e?m, term**

Example: *me?er* finds *meyer, meier, meder. safe** finds *safety, safeguard*

Phrase search

With the phrase search you can find documents in which certain words occur side by side. The words you are looking for are enclosed in quotation marks:

Syntax: *"phrase"*

Example: *"Angela Merkel"*

Fuzzy search

With the fuzzy search you can find documents in which words occur that are similar to the search word. The minimum similarity used in iFinder is 66% to the search term by default.

Syntax: *term~*

Example: *mayer~* (finds *Mayer, Meyer, Meier* etc.)

By specifying a number between 0 and 1, the required similarity can be indicated (larger number = greater similarity, the default is 0.66):

Syntax: *term~x.y*

Example: *meier~0.8* (finds *Meier, Maier, Meyer*, aber nicht *Mayer*)

Fuzzy phrase search

With the fuzzy phrase search you can find documents in which certain words occur at a maximum distance (measured in words) from each other.

Syntax: *"phrase"~10*

Example: *"house garden"~10* (finds for example *the house with the wonderful garden*)

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Range query

The range search finds documents that contain words that appear (alphabetically) between the search words. This is useful for area searches on numbers or dates. The following example retrieves all documents that where changed between 2004-06-29 and 2004-06-30.

Syntax: *[x TO y]*

Example: *lastModifiedDate:[2004-06-29 TO 2004-06-30]*

2.6.2 Extended query syntax with special search modes

Note: Depending on the configuration, not all options are available to you.

Search mode	Operating mode
NEAR	NEAR queries specify the distance which words - listed subsequently in parentheses - may have from each other. . It depends on the configuration if you can use wildcards like an asterisk * together with this.
NEAR/0 (IntraFind AND Software)	**IntraFind** and **Software** need to be next to each other.
NEAR/S (IntraFind AND Software)	**IntraFind** and **Software** need to be in the same sentence.
NEAR/P (IntraFind AND Software)	**IntraFind** and **Software** need to be in the same section
NEAR/P (car AND self-driving) AND NOT navigation	**car** and **self-driving** need to occur in the same paragraph, the word **navigation** must not occur in the paragraph.
MODE	Defines the mode of the search, for example with normalization, special upper and lower case, observance of umlauts (diacritics), etc. The various modes can be combined meaningfully.
MODE/E (INTRAFIND) **MODE/E (IntraFind AND Software)** **MODE/E (Kanzlerin OR Merkel)**	Exact match required, only finds documents that match the term INTRAFIND in capital case Only finds documents with **IntraFind** in exactly this spelling AND **Software**. **Kanzlerin** or **Merkel** have to occur in the document.
MODE/D (MÜLLER)	Replaces diacritics (e.g. German Umlaut), **Mueller** and **Müller** will be found. Includes MODE/E.
MODE/B (sang)	Base forms: Finds **sing**, **sung**. Includes MODE/E, and MODE/D.
MODE/C (booksellers)	Composed words: Also finds documents with sellers of books. Includes MODE/E, MODE/D, and MODE B.
MODE/P (Meier)	Phonetic processing: Also finds documents that are pronounced similarly (**Maier**, **Meyer**, **Mayer**)

2.6.3 Searching in field values

The field value search enables you to search within a specified search such as **file name**, **file extension**, **author**, **date**. You can also use search operators. You can use the normal search bar for the field search and combine it with other search terms. Searching in field values is rarely necessary, because you can filter the search results using meta data, see Filtering the hit list.

Searching with actual field names
In the standard configuration, the field **_str.language** is used to store the document language.

Syntax: *fieldname:query*

The following field value search returns all documents that are in German and contain the terms *Stuttgart* and *Messe*.

_str.language:de Stuttgart Messe	🔍

Search with logical field names
If your administrator has enabled this feature, you can also use logical field names for the search. The administrator must be configured by the administrator.
Example 1: For the actual field name **_str.attachment** the following logical names can be configured:**attachment**, **fileattachment**, **emailattachment**, **Example 2**: The logical field name **language** has been assigned to the actual field name **_str.language** and can thus also be used for the search. The following field value search returns all documents that are in German and contain the terms **Stuttgart** and **Messe**:

language:de Stuttgart Messe	🔍

Syntax examples
The following table shows some syntax examples for the specific use of field value searches.

Field values	To find documents …
_str.fileextension:pdf	… of type PDF. Alternatively, you can enter ***.pdf pdf** and ***pdf**.
_str.author:melanie	… that contain the name **Melanie** in the meta data field **Author**.
_str.author: "melanie may"	… that were created by the author **Melanie May**.
_str.filename:case*pdf	… that start with the filename **case** and end with **pdf**.
_str.language:de	… that contain German text.
_str.company:microsoft	… that contain the value **Microsoft** in the meta data field **Company**.

Note: The fields in your installation might be different and they also depend on the connected data sources.
The list of field names and their logical equivalents are based on the the default configuration and the assignments made by the administrator.

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Default field name	Logical variants (as implemented in administration)
_str.aboutme	aboutme, about
_str.abstract	abstract
_str.account	account, user
_str.address	address
_str.application	application, program
_str.attachment	attachment
_str.author	author,
_str.bcc	bcc
_str.category	category
_str.cc	cc
_str.cellphone	cellphone
_str.client	client
_str.company	company
_str.connector	connector
_str.creator	creator
_long.datecreated	date, createdate, creationtime, creationdate
_long.datelastmodified	changedate, modifieddate, modificationdate
_str.department	department
_str.description	description
_str.doctype	doctype
_str.editor	editor
_str.email	email
_str.enclosingfile	enclosingfile
_str.filename	name
_str.fileextension	extension, filetype

3 Working with search results

The hit list contains the following:

- **Hit list** with the documents and additional options for the complete hit list or single hits. You can switch between different views.

- **Facets** for quick filtering and for narrowing the search results. You can switch between different views.

- **Geo search** (optional) and **Timeline** for filtering by place and time.

How does the hit list look?

Hit navigation

- The first hits are displayed on the screen. When you scroll to the end of the page, more hits are loaded automatically. To load further hits, click on **Load more results** at the bottom.

- When you are at the end of the page, you can use the icon to jump back up:

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3.1 How are search results displayed?

The hits are displayed in such a way that you can quickly find hit that you are looking for.

3.1.1 Hit list view

- Per default, the hits are sorted by relevance. Relevance is determined by how the document matches the query and how new it is. Typically, documents that contain the term more than once and are newer are displayed higher up than documents that contain the term only once and are older.

- By default, all documents are displayed, even if they are duplicates. Duplicates are documents that contain exactly the same text, but can have different formats. You can display duplicates together to make the hit list more compact.

- You can choose between different views for the hit list: **Complete**, **Compact** and optionally **Table**.

- Documents that are configured as **Best Bet** for a query are displayed at the top.

- **Messages** that contain the search term, are displayed after the best bets. You can hide messages permanently, after you have read them.

- Information that is configured as **Knowledge Graph** for a query are displayed in an area to the right.

3.1.2 Sorting hits

1. Above the hit list, click on **Sort** .

2. Select the relevant option:
   Date ascending ↑
   Date descending ↓
   Relevance (default) ≡

3.1.3 Changing the hit list view

1. Above the hit list, click **Change view**.

2. Select the desired option:

   o ▬Complete: The hits are displayed with an excerpt and all relevant information.

   o ☰ Kompakt : Only the most important information is displayed. More hits are displayed simultaneously.

   o Table: The hits are displayed in tabular form.

3.1.4 Grouping duplicates

Duplicates have the same content and the same title. You can display duplicates grouped together.

1. By default, duplicates are displayed a single hits. You can define that they are grouped.

2. Above the hit list, click on 🗇.

3. The system determines whether two or more hits with the same content occur more than once in the hit list. The duplicates are displayed together.

4. On this tab, hit list options are not available.

3.1.5 Best bests and messages

- Best bets are displayed for certain search terms as first hits.

- Messages are displayed for a certain period in time regardless of the search term.

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3.1.6 Reading and hiding messages

- Messages are displayed in the upper part of the hit list.

- You can fold the messages view in and out.

- To display a longer message completely, click on **Read more**. The message opens in a separate window.

- To hide a message permanently, click on **Don't show again**.

3.1.7 Knowledge Graph

The Knowledge Graph shows information that was configured for the search term by the administrator. The text can also contain special links that start an advanced search query or open a new search tab.
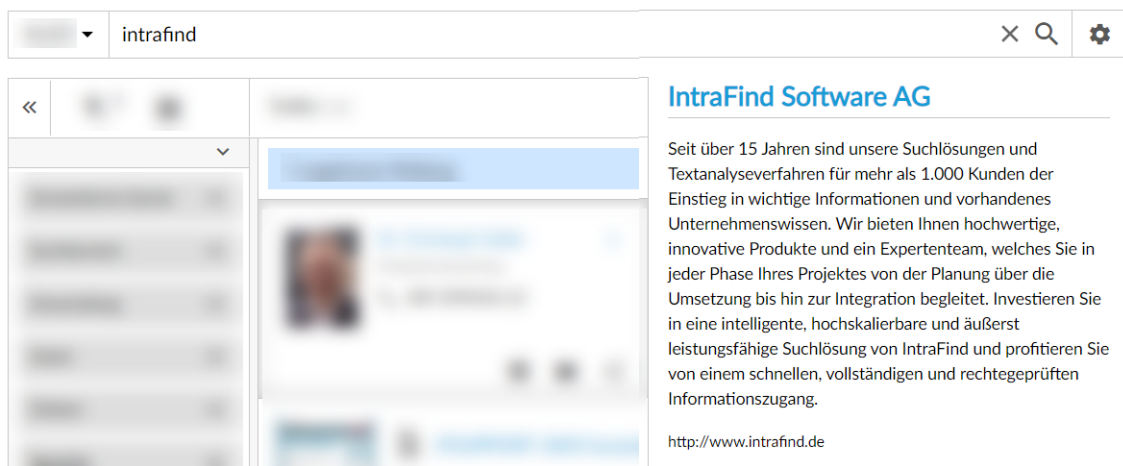
3.1.8 Filtered hit lists (optional)

Per default, all hits are displayed.

≣	All (default)
👥	People
📄	Documents
Your system is configured either for filtered hit lists or for parallel searches with several search tabs.	

3.2 Displaying a hit document

In the hit list, you see a part of the document that applies to your search request. You can display the document in a preview or in the original format. You can display additional data for the document.

- To display the document itself, click on the heading or the file path. Alternatively, open the menu and click **Open**. Depending on the browser and the settings, the document is downloaded or opened in its original format, e.g. as a website in the browser or in a PDF viewer. If it is an attachment to an e-mail, the original e-mail is opened, from which the attachment can also be accessed.

- To show data for the document, open the menu and click on **Details**. The data is displayed in a new window.

- To show the preview in the separate window, click on the thumbnail. For ZIP files an overview of the contained files is displayed. For e-mail attachments, the parent e-mail is displayed.
  If an file type icon is displayed instead of the thumbnail, the preview is not or not yet available.

In the preview, you can scroll from hit page to hit page, scroll through the document, change the display size and rotate the document.
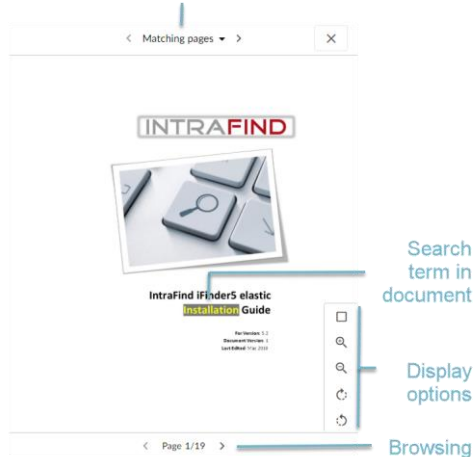
Document with selected hits in the preview

The display settings apply only for the currently displayed page. When you leave the page, the display settings are reset.

Show complete page ☐

Zoom in or zoom out 🔍 🔍

Rotate clockwise or counterclockwise ↻ ↺

3.3 Filtering the hit list

You can filter the hit list to the matching results with a few clicks. The available filter criteria depend on the configuration and the search. Typical facets are for example the scope, the author and the date.

The filter criteria can be displayed in different ways:

- As a list of the most important facets, which you can expand and collapse separately.

- As tiles in a knowledge map. The facets are unfolded and searchable.

To switch between the views, click on the icon ⚏ Change view.

3.3.1 Set and apply filters

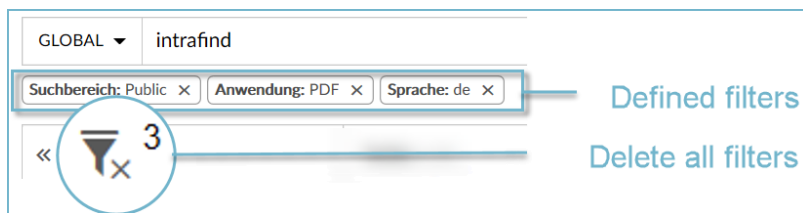You have the following options to set and apply filters in an opened facet:

- One value: Click ↗. to the right of the facet value. The filter is set immediately and the hit list is updated. 💡 Video: Apply filter directly

- One or more values: Select all values you want to apply and click **Accept**.

Depending on the facet, you have further options:

Facet with many values	Click on **More** to show all values.
Facet with search field	Enter a search term and start searching. The value list is filtered.
Facet for folders	To display the path as a tree structure, click on the folder icon or the arrow. Select the path or the folder name in order to filter by it, and then click on **Accept**. You can also click ↗ to the right of the facet value. **Folder** ∨ ☐ 📁 //ml-if-filer-01 (902) ∨ ☐ 📁 Public (902) › ☑ 📁 QA (900) › ☐ 📁 Users (2) Click on **More** to show all paths. This is only possible if no path is expanded. **Note**: Only hits for which there is a folder are displayed here. Therefore, the total number displayed here may differ from the number of hits.
Facet for the date	Click on one of the predefined periods or click **Select a period** to define a different period.

> When you change the current search query and search again, the filters are retained.

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3.3.2 Remove filter

All defined filters are displayed below the search field.

- To delete a filter, click on **x** for the filter displayed.

- To jump to the facet and change the value, click on the facet name. Then delete the filter:

  o To the right of the value click on ✕. The filter is removed immediately.

  o Alternatively, remove the selection for the values and click **Accept**.

- To delete all filters, above the facets, click on the icon with the number: ▼ₓ².

3.3.3 Facet area in standard view

Here you can see the facets arranged one above the other. To select values, expand the facets. The hits are displayed with details.

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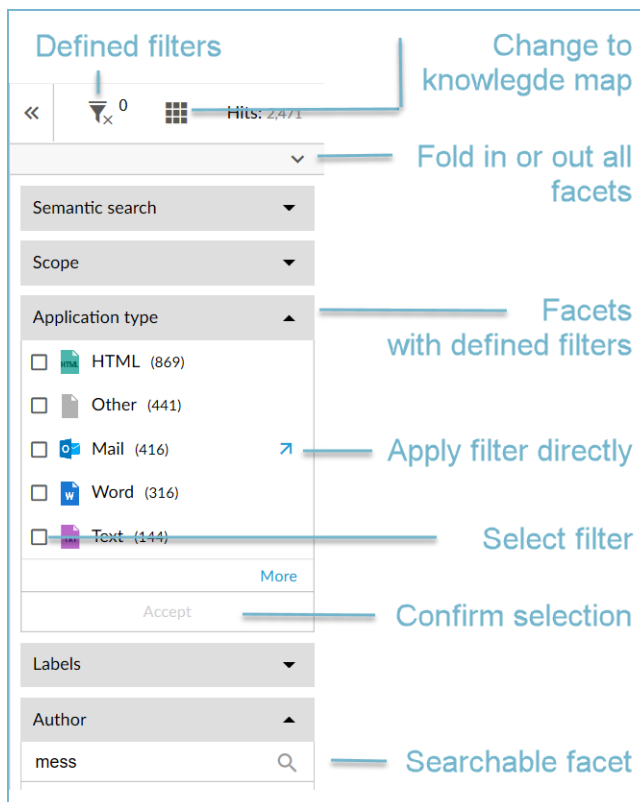
3.3.4 Facet area as knowledge map with tiles

Here the facets are unfolded and searchable. The hits are displayed as a list. Use this view if you work intensively with facets, for example to create hit lists for an export.
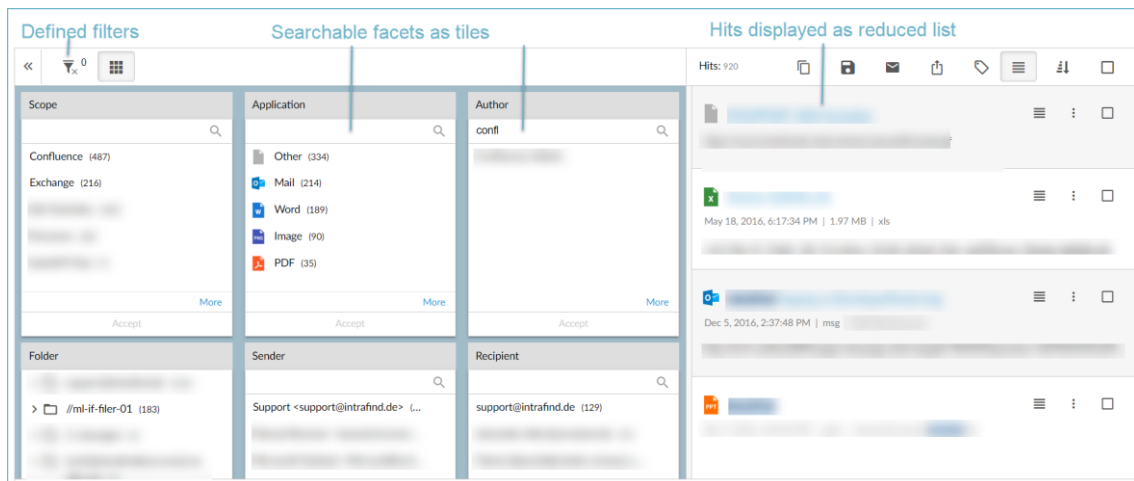

Typical facets

Name	Description
Application	Name of the application as determined by the file extension
Date	Information about the modification date
Company	Information from meta data field *Company*
Topic	Information from meta data field *Topic*
Subject	Information from meta data field *Subject* of a document
Author	Information from meta data field *Author* of MS Office Documents
Manager	Information from meta data field *Manager*
Source	Information about the sources
Category	Information from meta data field *Category*
File Type	File extension
Language	Language, in which the document was created
Folder	Information about the folder structure

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## 3.4 Filtering with semantically correlated terms

When you search for a term, semantically correlated words and phrases are determined. You can use these words and phrases to quickly narrow down or extend the hitlist. The proposed words and phrases are calculated dynamically. They are either displayed as a list or as a word cloud.

3.4.1 Semantic search as a list or as a word cloud
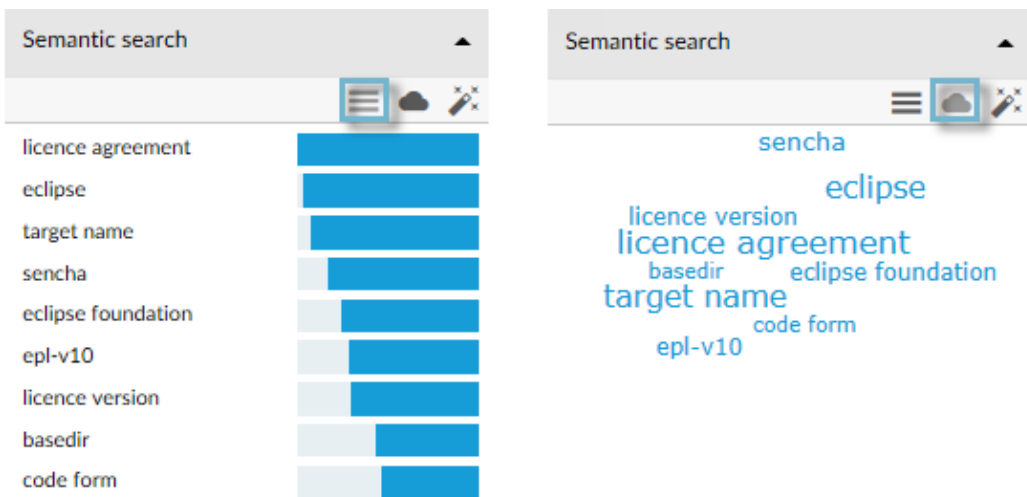
3.4.2 Using semantic search

1. Open the semantic search filter with the arrow icon.

2. Click on the words and phrases that you want to include.

3. In the search field, you see the resulting search term:
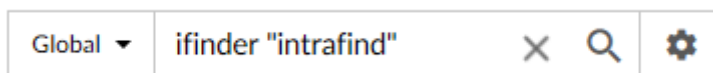
3.4.3 Finding by chance with serendipity

With the serendipity search, you find documents with terms that were not in the focus earlier but may have strong correlation to the original search term.
The following example shows the **Serendipity** option.

1. Search for a term, for example *Tennis*.

2. With a regular search, the system finds all documents that contain the term.

3. Open the semantic search filter with the arrow icon.

4. Click on **Serendipity** .

5. The serendipity search results are displayed on a new tab. The query is constructed using boolean OR combinations of all serendipity terms. The originally entered search term is not included in the query in order to extend the original search scope.
   Example: The system searches for all correlating term without the term *Tennis* and finds for example *ATP*, *André Agassi*, *Boris Becker*, *Steffi Graf*, *Wimbledon*, *Daviscup*, *Weltrangliste*.

3.4.4 Displaying similar documents

Also for a single document, you can find additional hits based on important terms and phrases. A document is considered similar if it contains at least one of the top terms. The number of similar documents can therefore be very large.

1. Open the menu for the document.

2. Click on **Similar documents**.

3. The similar documents are displayed on a new tab. On this tab, hit list options are not available.
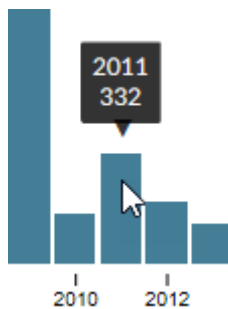
3.5 Filtering hits by time (timeline)
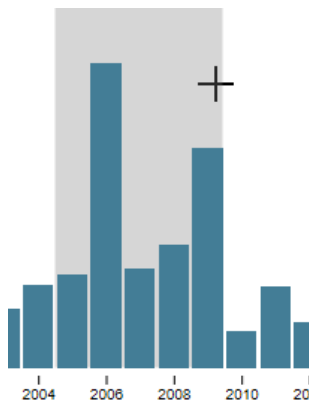
You can filter hits by time.
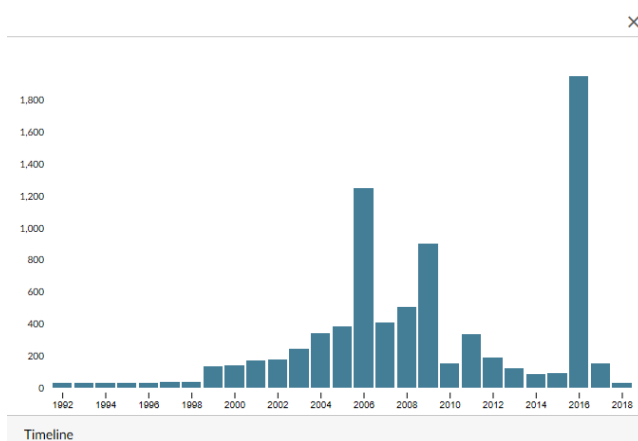
3.5.1 Using timeline

1. In the bottom right corner, click on **Timeline**. On the timeline you can see the time periods for which hits were found.

2. To display the exact number for a time period, move the mouse pointer to the respective bar.


3. Click on a bar to show only hits for this time period.

4. To include multiple bars, select the bars.

5. To return to a previous time period, click on the time period in the top left corner of the timeline pane.

6. You can combine this filter with other filters. Above the facets you see the number of defined filters: **Defined filters**

7. To remove only the date filter, open the **Date** facet and remove the selection of the value. To remove all filters, click on the icon.

3.6 Filtering hits by location (geo search)

You can filter the hit list by the location that is associated with the document.
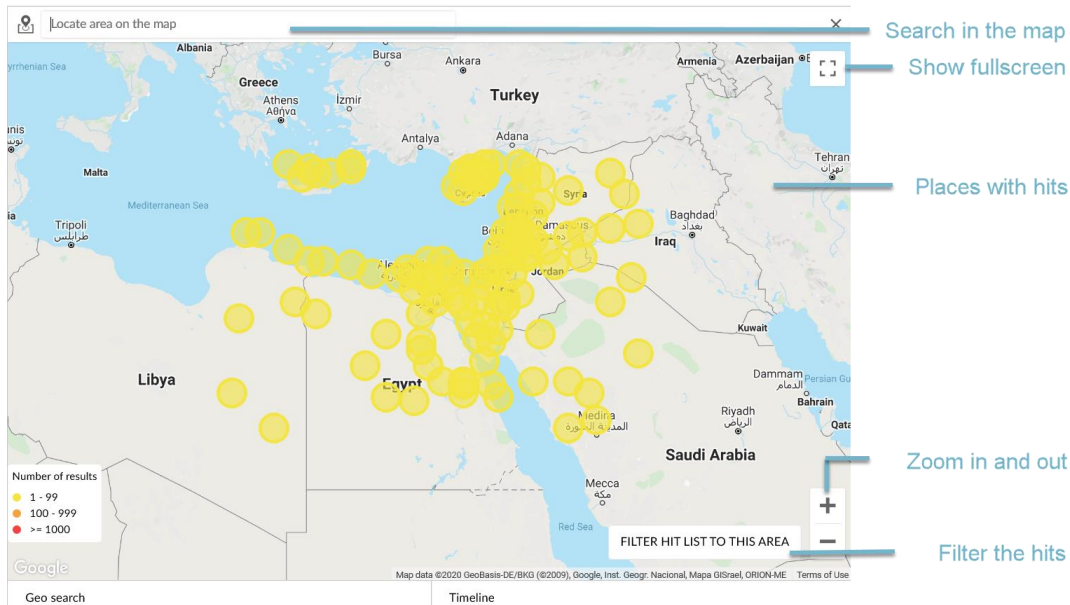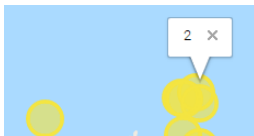

Prerequisite: The documents are associated with geographic coordinates.

1. Start a search request.

2. In the bottom left corner, click on **Geo search**. On the map you can see the areas for which hits were found. The color indicates the number of documents.

3. To display the number of documents, click on the circle.
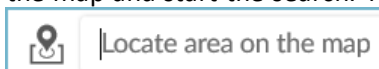

4. To view only a part of the map, zoom in.
   Zoom in +
   Zoom out —
   Toggle fullscreen view (optional)

5. To search for a specific location in the map, enter the location name in the search field of the map and start the search. The location is displayed on the map.

6. To only show hits that are associated with the displayed map section, click on **Filter hit list to this area.** This is only possible if you are not in fullscreen mode.

7. To remove all filters, click on **Defined filters**.

8. When you perform a new search request, all defined filters are removed.

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4 Using and saving search results

On mobile devices, individual functions may be hidden for space reasons.

4.1 Forwarding a hit

You can forward a link to the document. The person to whom you forward the link, can only display the document if assigned the relevant permission.

1. Open the menu for the document.
2. Click on **Forward.**
3. In your email application, a new email containing the link is created.

4.2 Adding hits to favorites

You can add a document to your favorites.

- The document is added to **My favorite documents** in the dashboard.
- If the document is found in a new search, it is marked as favorite in the hit list.

You can only make document types a favorite, for which the administrator has configured this function.

1. Open the menu for the document.
2. Click on **Ad to favorites**.
3. The document is added to **My favorite documents** in the dashboard as last document.

4.3 Saving a search query

You can save the search query, for which the hit list is currently displayed. Saved search queries are displayed in the dashboard.

To save search queries:

1. Above the search input field, click on the icon:
   Save search request 💾
2. The search request is saved. You can perform it later from the dashboard.

4.4   Sending a search query

You can send a link to the search query. In this link, all settings are contained that you made while working with the hit list, for example the filters that you defined. The person, to whom you send the link, sees the hit list exactly as you see it. Exceptions are documents for which the person has no permissions.

To send search queries:

1.   Above the search input field, click on the icon:
     Sending a search query ✉

2.   In your email application, a new email containing the link to the search request is created.

4.5   Adding a label (optional)

You can add one or more labels to a hit. All other users who see the document can also see the labels. Depending on the configuration, you can assign free labels or select one or more labels from a preconfigured list for a label category. For label categories for which there are translations into other languages, you see the label category in the display language.

1.   Click on **None** or on the already existing labels.

2.   Enter the label or select it from the list. Invalid or too long entries are marked accordingly.

3.   Confirm with the Enter key.

4.6   Assigning or deleting labels for several hits simultaneously (expert function)

As an expert, you can assign a label to all or to selected hits in the hit list simultaneously or delete a label.

Warning: With large hit lists this process can take a lot of time.

1.   If you only want to change individual hits, select those to which you want to assign a label.
     To do this, click on the icon **Select** ☐

2.   You can also select all hits at once. To do this, click on the icon above the hit list:
     Select all hits ☐
     The checkboxes for selecting are only displayed if you have the respective permission.

3.   Above the hit list field, click on the icon: **Labels** 🏷

4.   Choose if you want to add a label or to delete one.

5.   Enter a free label for **Labels** or select a preconfigured label. If the label type allows several values, you can also add more than one label at a time.

6.   Select to which hits you want to apply the action. If you select **All hits**, the process can take a long time.

7.   Click on **Apply**.

8.   The status is displayed. Close the window with **Close** or with **Close & Update hit list**.

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4.7   Exporting the hit list (expert function)

As an expert, you can export the hit list as a CSV file. You can define which hits and which fields are exported.

Warning: With large hit lists this process can take a lot of time.

1. If you only want to export individual hits, select the hits to be exported. To do this, select the hit by clicking on the symbol:
    Select ☐

2. You can also select all hits at the same time. To do this, click on the icon above the hit list:
    Select all hits ☐
    The checkboxes for selecting are only displayed if you have the respective permission.

3. In the list, select fields that you do not want to export. Press the **Ctrl** key to select more than one field with the mouse.

4. Move the fields to be excluded to the **Not exported fields** field.

5. For an export to Excel, use a semicolon as separator.

6. Select which hits you want to export: **Visible, Selected**, **All**. Alternatively, you can define a range. Enter the position of the first hit and the number of hits.

7. Click on **Export**.

5 Working with the dashboard

The dashboard provides information and functions around the search. You can add or remove widgets and configure how they are displayed.
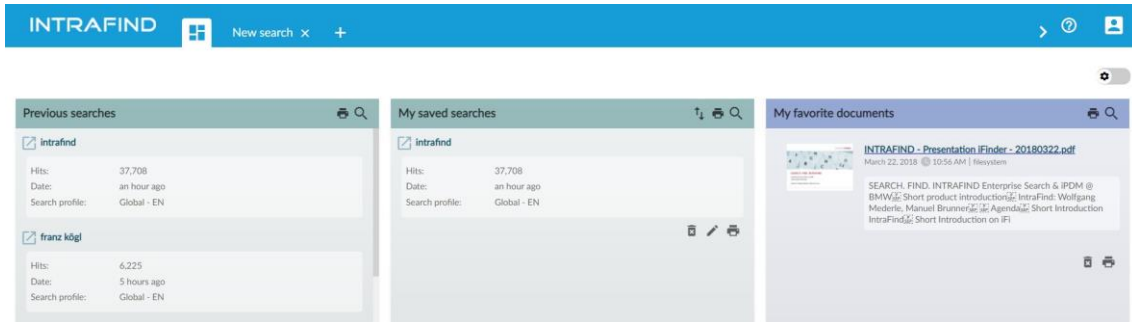
5.1 Dashboard widgets

The following widgets are displayed by default:

- Previous searches

- My saved searches

- My favorite documents

You can also add further widgets. The selection may differ for you:

- People search

- Bulletin board

- Document distribution

- News

- Last saved documents

5.2 Open the dashboard

Click on the Dashboard tab:

5.3 Widget functions

The functions available to you depend on the widget.

To sort the displayed items, e.g. My saved searches:

1. Click ↑↓ **Sort**.

2. Click sort by, e.g. **Date** or **Title**.

3. Click again to change the sort order.

4. To hide the sorting, click ↑↓ **Sort** again.

To delete displayed items, e.g. My saved searches and My favorite documents: 💡 Video: Delete displayed items

1. Click ⊗ **Delete** below an item.

2. The item will be immediately deleted.

To edit the name of a displayed item, e.g. My saved searches: 💡 Video: Edit the name of a displayed item

1. Click ✎ **Edit** below an item.

2. Enter a new name.

3. Confirm with **OK**.

To print displayed items:

1. Click 🖶 **Print**.

2. The print dialog will be displayed.

5.4 Customizing the dashboard

To turn the edit mode on:

1. Turn on the edit mode using the button at the top right hand corner: ⚙

2. Editing is possible: ⚙

To add or remove widgets: 💡 Video: Add or remove widgets

1. Turn on the edit mode.

2. Check or uncheck the widgets of your choice.

To adjust the number of columns: 💡 Video: Adjust number of columns

1. Turn on the edit mode.

2. Select the number of columns you want.

To adjust the position and size of a widget: 💡 Video: Adjust the position and size of a widget

1. Turn on the edit mode.

2. Change the size by clicking on the ⊖ **Smaller** or ⊕ **Larger** buttons.

3. Change the position by dragging the widget with the left mouse button pressed.

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6 Accessible iFinder version

The accessible version of the iFinder allows to operate iFinder via the keyboard and can be read aloud by screen readers.

If you wish to use the accessible version, contact your administrator. The administrator will give you the address that you can open in your browser.

> The accessible version is only available in German.

You have the following options:

- Enter search term and search (**suchen** button)

- Show suggestions for auto-completion (**Vorschläge** button)

- Filter search results (**Filter anzeigen** button)

- Open documents from the hit list (**Öffnen** button)

- Adjust font size (**A-** und **A+** buttons)

Operation via the keyboard:

- Use the Tab key to switch through the buttons and fields.

- Use the space bar to activate options, e.g. filters.

- Press the Enter key to confirm your entries.

7   Glossary

Term	Definition
Boolean operators	String that defines a logical relationship between search terms. Example: AND, OR
Distance search	Searching for terms that are not next to each other.
Fuzzy search	Searching for the term and similar terms.
Linguistics	Optional component. Allows a linguistic processing of the search term.
Meta data	Additional information about the document that go beyond the content itself. Examples: author, modification date, file extension
Range query	Expert search. Searching for value ranges in meta data fields
Search profile	Defines with which scope and settings search is performed. Configured by the administrator.
Search syntax	Set of rules for defining queries.
Searching for phrases	Searching for terms that are next to each other.
Wildcard search	Searching with wildcards like an asterisk * or a question mark ?.