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Searching Orca Archiver from within Outlook

The search dialog contains fields with the various criteria that can be searched on.

The results returned from the search must meet ALL the specified criteria.

Any fields in the dialog that are left blank are interpreted as being irrelevant to the search (that is, *any* value will match).

Start Date

Select a month, day, and year to start the search. Emails from this date will be included in the results.

End Date

Select a month, day, and year to end the search. Emails up to and including this date will be included in the results.

Select All Dates

Checking this box will supersede any Start and End Date selected. All dates will be searched.

Email From

Emails with addresses matching your criteria will be returned. You may enter email addresses manually by enclosing them in parentheses and separating them by a space ("test@compliance.com" "test2@compliance.com"). or by using the Email From button as described here:

1. Clicking the Email From button will give you a list of all indexed email addresses that you may add.
2. Highlight addresses you wish to add.
3. Click >> to move the addresses to the right column.
4. Click Add to add them to your search, or Cancel to return to the Email Search screen.

Email To

Emails with addresses matching your criteria will be returned. You may enter email addresses manually by enclosing them in parentheses and separating them by a space ("test@compliance.com" "test2@compliance.com"), or by using the Email To button as described here:

1. Clicking the Email To button will give you a list of all indexed email addresses that you may add.
2. Highlight addresses you wish to add.
3. Click >> to move the addresses to the right column.
4. Click Add to add them to your search, or Cancel to return to the Email Search screen.



Subject

Add search term criteria here to search the subject line of emails.

Search Text

Search through email message bodies and any of the following attachment file formats, using your choice of search terms:

1. Portable Document Format (.pdf)
2. Word (.doc)
3. PowerPoint (.ppt)
4. Excel (.xls)
5. Plain Text (.txt)
6. Zip (.zip) **Note:** Only the above file formats will be searched within a .zip file, and only if the .zip file is not password-protected.

* **NOTE:** You may use any combination of the above search fields to tailor to your search needs.

Search Terms

Search terms will be used in the various search fields available in your Orca Archiver. The various types of terms, along with their modifiers and Boolean operators, are described below.

Searching in your Orca Archiver is not case-sensitive; therefore, searching for battery and BatTery will return the same results. There are two types of search terms: single terms and phrases.

- Single Terms are single words or numbers such as guaranteed or transaction.
- Phrases are a group of words surrounded by double quotes such as "guaranteed return".

Multiple terms may be combined using Boolean operators to create more complex searches.

Term Modifiers

Term modifiers may be used to provide more depth relating to the terms of your search. For example, they may be used to find the misspelled words or words similar to your search term.

1. *Wildcard Searches*
 - a. There are two types of wildcard searches: single-character wildcard and multiple-character wildcard.
 - i. Single-Character Wildcard: Performing single character wildcard searches is accomplished using the question mark (?) symbol. This will find any variation of the search term with that single character replaced.

Example: fre? returns free, Fred, fret, etc...



- ii. **Multiple-Character Wildcard:** This modifier will look for any variation of the search term zero or more characters at the point of the asterisk (*) and after.

Example: p*d returns pod, piled, poured, etc...

* **NOTE:** Do not use "?" or "*" as the first character of a search. Example: *eer and ?ord are not valid search terms.

2. *Proximity Searches*

- a. Proximity searches are used to find single terms that are located a specified distance apart. To perform a proximity search, place the two single terms in double quotes followed by a tilde (~) and the number of words apart you wish to search.

Example: "guaranteed return"~10 results in "guaranteed return", "guaranteed to give you a 50% return", etc...

3. *Boosting a Term*

- a. This modifier allows you to establish a relevance priority system for your search results. Term boosting is accomplished by placing a caret (^) symbol and a boost factor (any positive number) after the term. The higher the boost factor used, the more relevant the term.

Example: if you are searching for "time requirement" and you would like "time" to be more relevant than "requirement," you would use: time^5 requirement.

- b. You may also boost phrases, as in the following example:

Example: "equity offering" "guaranteed results"^10

* **NOTE:** By default, the boost factor is 1. Although the boost factor must be positive, it may also be less than 1 (e.g., 0.2).



4. *Fuzzy Searches*

- a. A fuzzy search will allow you to search for a single term that may have been misspelled and will result in terms with similar spelling and the same number of characters. Use the tilde (~) after your single term to perform a fuzzy search.

Example: United~ returns United, Unlted, Vnited, Vnlted

- b. Additionally, you have the ability to specify the required similarity using an optional parameter. This is done by adding a value between 0 and 1 after the tilde (~). The closer to 1 the value, the higher similarity level required. By default, the value is 0.5.

Example: United~0.8 will be more strict in its similarity requirements than United~0.2.

Boolean Operators

In addition to the many term modifiers available, there are Boolean operators. These operators allow terms to be combined for more flexibility. The available Boolean operators are AND, +, OR, -, and NOT.

* **NOTE:** Boolean operators must be typed in ALL CAPS.

1. *OR*

- a. OR is the default conjunction operator, meaning if there is no specified Boolean operator between two terms, the OR operator is used. OR links the two terms and returns a result if either is found.

Example: To search a field for either the phrase "report due" or the single term "price", use "report due" price -or- "report due" OR price

2. *AND*

- a. The AND operator searches a field and returns a result if both terms exist.

Example: To search for "equity offering" and "ABC Securities," use "equity offering" AND "ABC Securities"

3. *+*

- a. The "+" or required operator requires that the term after the "+" symbol exist somewhere in the selected field of the email.

Example: To search a field for emails that must contain "ABC" and may contain "Securities" use: +ABC Securities



4. -

- a. The "-" or prohibit operator excludes results that contain the term after the "-" symbol.

Example: To search for documents that contain "Free", but not "true material" use:
-"true material" Free

- b. NOT is another way of excluding results when there are two or more search terms. The term after the NOT will be excluded.

Example: To search for documents that contain "Free", but not "true material" use:
Free NOT "true material"

* **NOTE:** The "-" and NOT operator may not be used on the only search term. For example, -"securities firms" or NOT test will not modify search results.

Grouping

The Orca Archiver supports using parentheses to group clauses to form sub queries. This may be useful if you would like to control the order of Boolean logic for a search.

Example: To search for either "broker" or "hedge" and "website" use: (broker OR hedge) AND website

Escaping Special Characters

There are some characters that the Orca Archiver will attempt to treat as Boolean Operators even if you intend them to be part of the search. These characters are:

+ - && || ! () { } [] ^ " ~ * ? : \

In order to search for these characters, you must use an escape character. The escape character for the Orca Archiver is \ (a backslash).

Example: To search for "What is the guaranteed result?" use: What is the guaranteed result\?

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