Search Policies

The policy manager search feature performs searches on content, titles, and summaries of all text based policy documents (Word doc, PowerPoint, Text-based PDF)

Search Types

There are two types of searches within Policy Manager:

1. keyword search
2. phrase search

Keyword Search

To perform a keyword search, provide a list of words seperated by spaces: `password wifi public`. Keywords are weighted based on the order they appear. The first word in the list (password) is considered "more important" than the second word (wifi). A keyword search will find documents containing the words in the provided keyword list.

Phrase Search

To search for a phrase in a document, wrap the phrase in double quotes: `"wifi password policy"`. A phrase search will look for documents which contain the exact phrase (ignoring case). It will only match documents which contain all words in the phrase in the exact order entered.

Result Types

There are two types of search results generated for each query:

1. exact
2. related

Exact Matches

Exact matches are documents which match the search criteria exactly (ignoring case). Exact matches do not match different forms of words. E.g. if you search `policies`, documents containing only the word `policy` will not be considered a match.

An exact match for a keyword search is a document which contains *all* keywords in the provided list.

When searching `password wifi public`: if a document contains `password` and `wifi`, but **not** `public`, it will **not** be considered an exact match.

Related Matches

Related matches are documents which do not match the search query exactly but contain exact matches for only part of your search criteria and/or words which are only *related* to the ones you searched for.

A related word is one that has the same meaning of the word you searched for but in a different form.(E.g. different tense, plurality, etc). For example, if you searched for the keyword `officer`: a document which did not contain the word `officer` but contained `officers`, `officer's`, `officers'`, `officered`, or `officering` would be considered a related match.

> Releated searches for phrases act like keyword searches. Documents which contain any form of any word in the phrase will be considered a related match.

Rank

Search results are ordered by their Rank. A result's rank is an arbitrary number representing how well it matches your search criteria relative to the other matches. The higher the rank, the "better" the match.

Types of Matches

There are three types of matches:

1. Title
2. Summary
3. Content

When performing a search, each document's title, summary, and pages are searched individually and their ranks are compared. Whichever part of a document receives the highest rank determines the document's match type and rank.

> Title and Summary matches tend to have higher rankings than content matches since they contain fewer words and therefore the matched part makes up a higher percentage of the content.

Search within a single document

To search inside a single document click on the magnifying glass icon next to the document's search result record. This will temporarily convert the document to a pdf, open it in PdfXe, and highlight all matches within the document. You can then use the PdfXe search panel to perform full featured searches within the document. See the PdfXe manual for more information on search.

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