

Search Tips

Mac

In Mac OSX, the search tool is called Spotlight. If you're not familiar with how to use Spotlight, here is a going-paperless primer.

To bring up Spotlight, hit *Command-Space*. You'll see a search box up in the top-right of your screen.



In this example, let's say that we are searching for a document with the following characteristics:

- Filename: 2011_01_15-iTradeRRSP.pdf
- File created: February 1, 2011
- Location: /Volumes/REFERENCE/Finances/Statements
- Tags: etrade, itrade, rrsp
- A stock in the RRSP that is text in the document: Westjet

Here are some searches we could use to find it.

Note: This is a bit of a silly, extreme example to show all the ways that you can search. In most cases just typing a word from the name or contents will take you right to the file that you are looking for.

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Jump To The Folder

Search query:

Statements kind:folder

You don't really need the "kind" command, but it will just help narrow it down.

Find All PDFs

Search query:

kind:pdf

That is probably not going to be too helpful as it will try to find all the PDFs on my computer.

Type A Keyword

Search query:

iTrade kind:pdf

That is not bad, but it is going to bring back any PDF file on my computer that either has the word iTrade in the filename or in the contents of the file. It might be too much.

Search By Tag

Search query:

iTrade tag:rrsp kind:pdf

That is better, but it is going to bring back any PDF file on my computer that either has the word iTrade in the filename or in the contents of the file. It might be too much.

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Only Find A File With Word In The Name

Search query:

name:iTrade kind:pdf

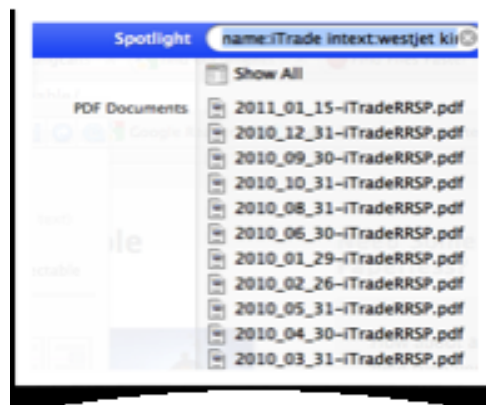
That is better, but we might have other files that have iTrade in the name. We only want the ones that also have Westjet in the contents of the file.

Limit By Both Name And Text

Search query:

name:iTrade intext:westjet kind:pdf

Now we're getting somewhere:



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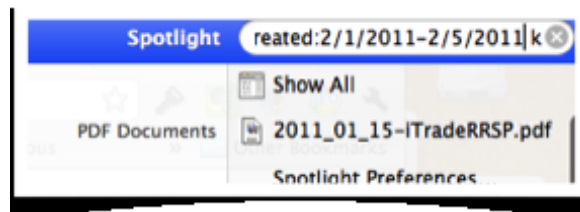
Limit By Name, Text, and Date

Lets say we remember that we created it in the first week of February.

Search query:

name:iTrade intext:westjet created:2/1/2011-2/5/2011 kind:pdf

There we go!



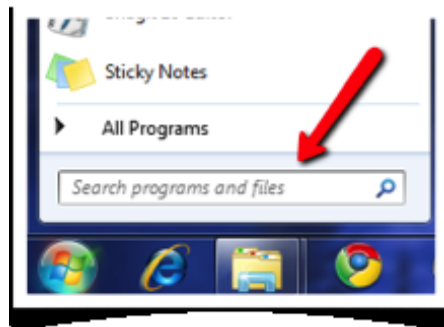
Again, keep in mind that you can mix and match any of these commands, but in many cases you don't even need them. If you just type "iTrade" or "Westjet" you would probably see the file that you want in the list somewhere.

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Windows

In Windows 7, the search tool is called Windows Search. If you're not familiar with how to use Windows 7 Search, here is a going-paperless primer.

To bring up Search, hit the Start button or the Window key. You'll see a search box at the bottom.



In this example, let's say that we are searching for a document with the following characteristics:

- Filename: feb-2011-teleseminar-outline.pdf
- File created: February 21, 2011
- Location: C:\Users\Brooks\My Documents\My Dropbox\DocSnap\DSProducts\Teleseminar
- A word in the document that we want to find: IRS.

Here are some searches we could use to find it.

Note: This is a bit of a silly, extreme example to show all the ways that you can search. In most cases just typing a word from the name or contents will take you right to the file that you are looking for.

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Type A Keyword

Search query:

outline

That is not bad, but it is going to bring back any file on my computer that either has the word outline in the filename or in the contents of the file. It might be too much.

Limit The Search By Name

Search query:

name:outline

That is pretty good, but if we have lots of different types of files that have the word “outline” in the name, it might bring back too much still.

Limit The Search By Name And Type

Search query:

name:outline type:document

Again, pretty good. But lets say we want to narrow down on the file with the word “IRS” in it.

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Limit By Name And Contents

Search query:

name:outline contents:IRS

There we go. Just for completeness, lets limit things by date.

Limit By Name, Contents And Date

Lets say we remembered that we created the file sometime in the week of Feb 20-26.

Search query:

name:outline created:2/20/2011..2/26/2011

There we go!

Again, keep in mind that you can mix and match any of these commands, but in many cases you don't even need them. If you just type "outline" you would probably see the file that you want in the list somewhere.