Smart Search User Guide

Purpose

This user guide provides instructions on how VBMS-Claims Evidence users can perform a query using Smart Search functionality.
Smart Search, also known as Text Search, is enhanced VBMS functionality which allows users the ability to search Veteran eFolders, without having to open them individually. This search functionality affords users increased efficiency and will result in a significant time savings.

1: Identifying eFolders Eligible for Smart Search Queries

When opening the text search panel, users will see one of three Optimal Character Recognition (OCR) statuses - All documents in the Claim Evidence folder OCR'ed, Some documents not OCR'ed, No documents have been OCR'ed OCR not begun. Please note, Smart Search is not operable in eFolders where the OCR status is no documents have been OCR'ed.

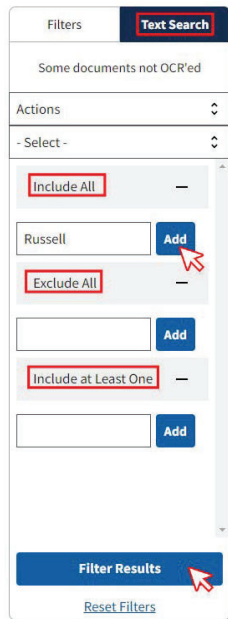| Filters	Text Search
Some documents not OCR'ed	
Actions	
- Select -	

2: Identifying Documents Eligible for Smart Search Queries

When viewing the document library, users should review the new 'Text Searchable' column. This column will generate one of two searchable indicators for each document. These indicators are 'Searchable' and 'Not Searchable.'

Subject	Document Title	Document Type	Text Searchable
Statement Support Demo	STATEMENT SUPPORT OF CLAIM VBA-21-4138-ARE.pdf	Education - General	Not Searchable
Diabetes Text Search Sample	Diabetes - Wikipedia.pdf	General Records Request (Non-Medical)	Not Searchable
REQUEST VA FORMS	REQUEST VA FORMS VBA-20-8800-ARE-2023-04-05 T13.43.53.pdf	General Records Request (Non-Medical)	Searchable

3: Conducting a Smart Search Query

From the document library, users should navigate to the left sidebar panel and select Text Search. Users have three text search options - 'Include All', 'Exclude All' and 'Include At Least One.' Once users have entered their desired text, select Filter Results.
Users will be prompted to update results - accepting the text search will adjust the table layout.

If users are searching for a word, often contained within a word, they must search using the wildcard. The wildcard can only be used in the middle of a word or at the end; it cannot be used at the start of a word.

Example Search: Asia*

This text is also found as 'AsiaService' within eFolders. Users must include the wildcard to surface all matches.

4: Identifying Smart Search Query Results

Documents with matching text from users' text search, will populate in the document library queue. Findings will be organized by receipt date. The "Text Match" column provides users the number of search keyword matches within the document. A higher count in this column may result in the best match for the keyword search.

This column represents the number of instances the text was located within the corresponding document.

Subject	Document Title	Document Type	Text Searchable	Text Matches
	20230328111748_datasheet.pdf	Award Print	Searchable	6
Rating Decision - Narrative	20230328110102 - narrative.pdf	Rating Decision - Narrative	Searchable	2
Rating Decision - Codesheet	20230328110102 - codesheet.pdf	Rating Decision - Codesheet	Searchable	1

5: Navigating to Smart Search Query Findings

To view a document, select the hyperlink in the "Document Type' column. VBMS will open a separate web page allowing the user to view the document. On this same page, users will see Smart Search results on the left sidebar.

Text matches will be shown in bold on the left sidebar and shown in blue on the document viewer.

To view a match in the search results sidebar, click the listed text match result.

6: Saving Smart Search Filters

Users can save recently used smart search filters from the left text search sidebar. After conducting a text search, users should select the actions drop down and then select *'save text search filter as.'*
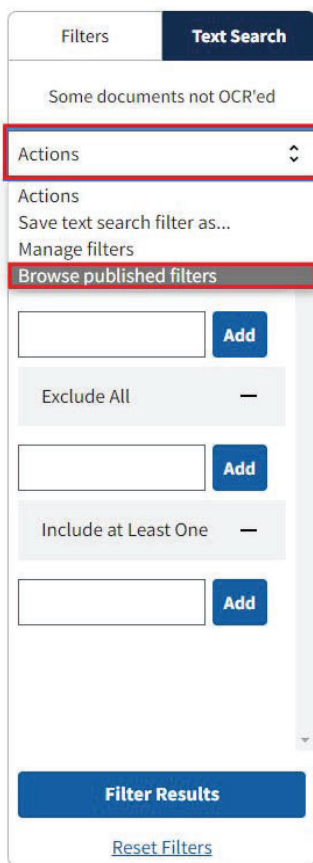
Users will be prompted to name and save the filter.

Users can *rename* or *remove* saved filters from the *Manage Filters* section under the *Actions drop down*.

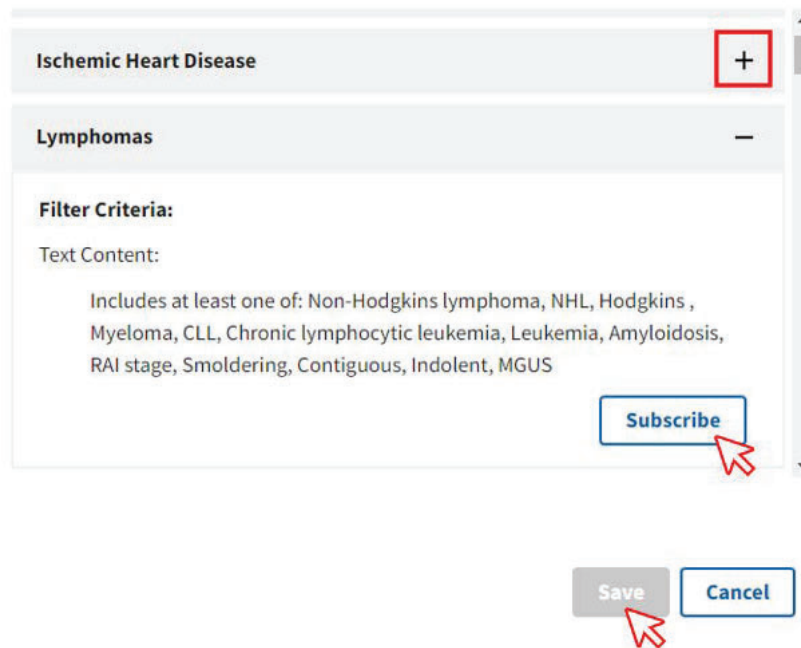# 7: Subscribing to Published Filters

Users can save search time by subscribing to *published filters* found under the *actions drop down* on the left text search sidebar. Published filters will populate in a pop out for users to review details - details can be seen by electing the *plus symbol* next to filter name.

Users can subscribe to the filter by selecting the *subscribe* button and selecting *save.* Subscribed filters are available to users under the left text search sidebar *select drop down* and the *manage filters* action under the *actions drop down*.