

Search inside your records

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Folio reads the documents you file, so you can find a record by what it says as well as by its name. Searching doesn't need a reason, though opening what you find might.

Before you start

You need permission to search records. Members, admins and owners have it to start with.

1 Open Search

Click **Search** and type in the box. You can search for a name, a matter or any words inside a document, such as "break clause".

2 Read the results

Matches on a record's name, matter or subject are under **File names**. Matches in the text are under **Inside documents**, with the lines that matched and the page they're on.

3 Narrow it down

Open **Search tips** for ways to be more precise. Put words in quotes to find an exact phrase, use OR for either word, or put a minus sign before a word to leave it out.

4 Open the record

Click a record's name to open it. If it's in a protected folder, or your organisation asks for reasons, you'll be asked why you're opening it first.

When something doesn't turn up

A newly filed record can take a little while to be read, and the results will tell you if some can't be searched inside yet. Scanned or faint pages are marked **LOW CONFIDENCE**, as a word in them might be missed.

Archived records still show in the results. Click **Restore to open** to bring one back before reading it.

If something goes wrong

I can see results but not the lines that matched.

Seeing the matching lines needs permission to open documents. Ask an admin in your organisation to [change what you can do](#).