

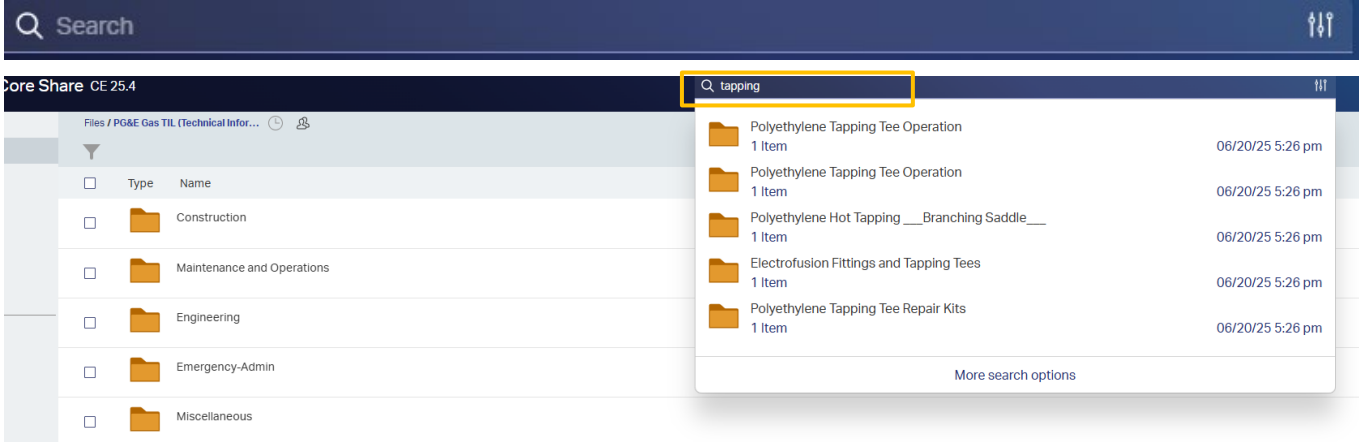

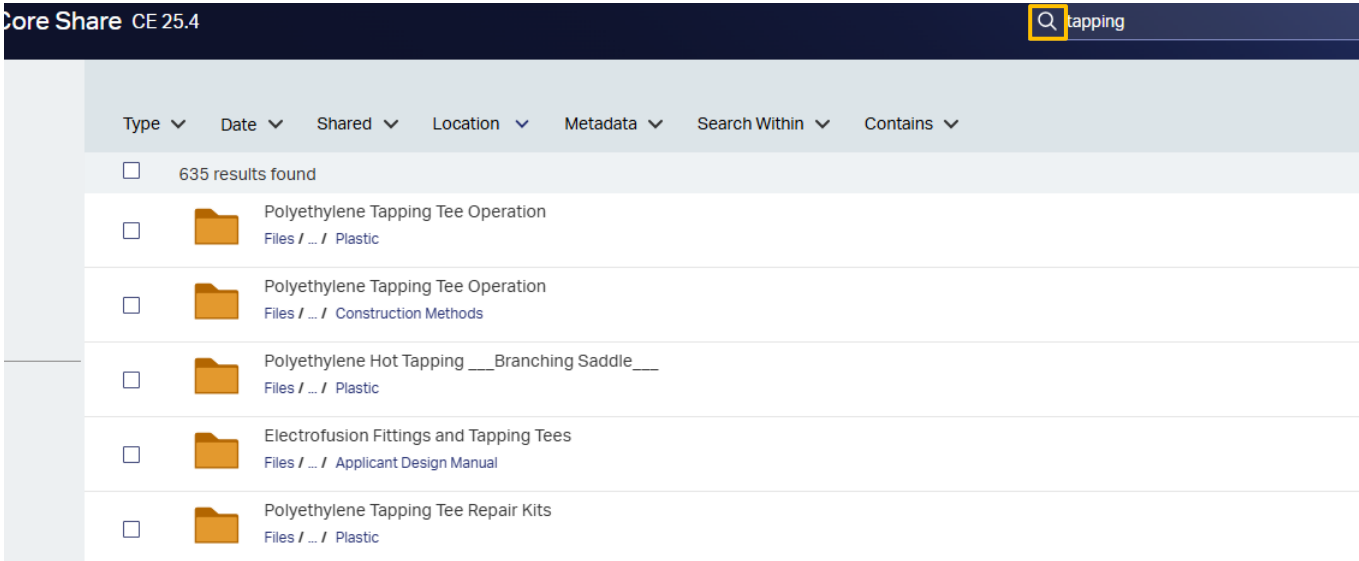


# Searching for Documents – Desktop and Mobile (All Users)

Revised: January 2026

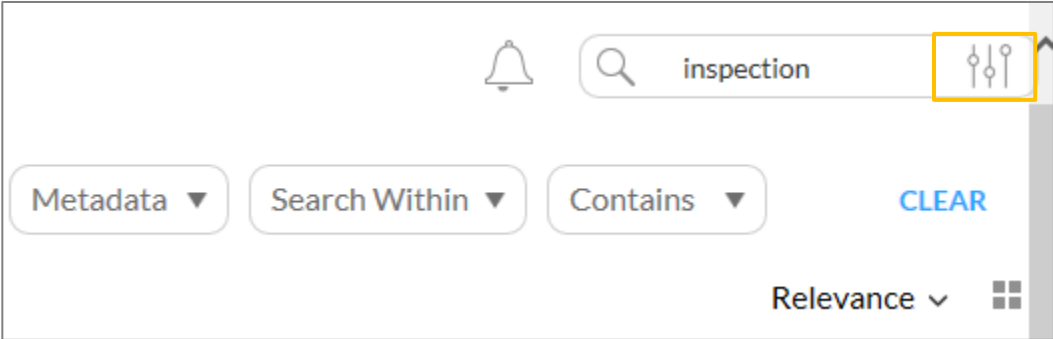
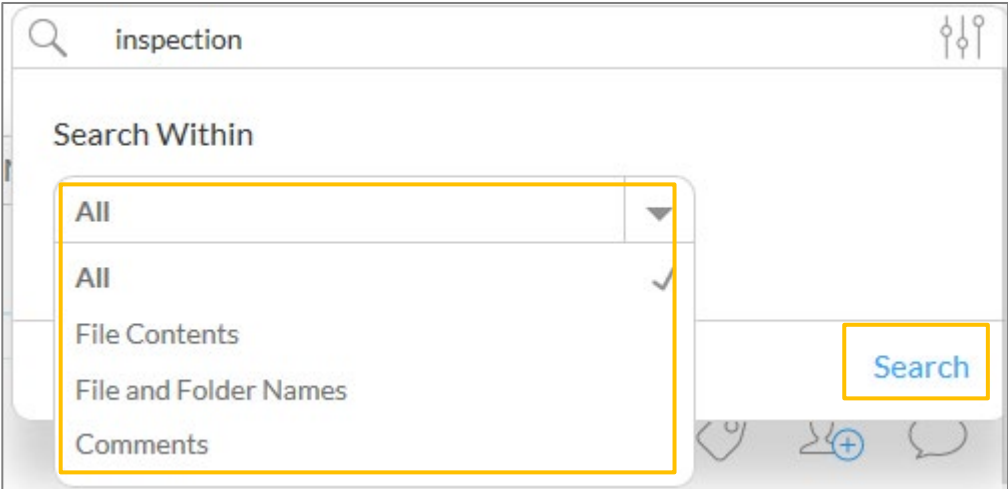
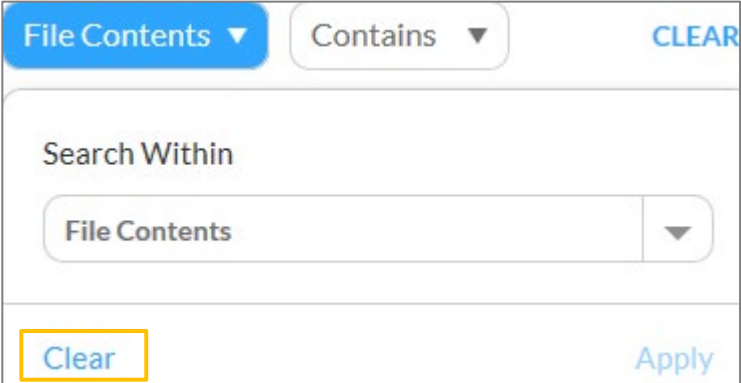
**READ TIME: 4 Minutes**

## Search for Documents

Step	Description
1	<p>In the <b>Search Bar</b>, enter the keyword. In this example, the word “tapping” automatically results in some suggested results.</p> <p>If you are searching for a phrase, enter the phrase in quotation marks, such as “Welder Performance Qualification.”</p>  <p>The screenshot shows a search bar with the text 'tapping' entered. A dropdown menu is open, displaying several search suggestions with folder icons, item counts, and dates. The suggestions include: 'Polyethylene Tapping Tee Operation' (1 Item, 06/20/25 5:26 pm), 'Polyethylene Tapping Tee Operation' (1 Item, 06/20/25 5:26 pm), 'Polyethylene Hot Tapping ___Branching Saddle___' (1 Item, 06/20/25 5:26 pm), 'Electrofusion Fittings and Tapping Tees' (1 Item, 06/20/25 5:26 pm), and 'Polyethylene Tapping Tee Repair Kits' (1 Item, 06/20/25 5:26 pm). A 'More search options' link is visible at the bottom of the dropdown.</p>
2	<p>Click the  <b>Search</b> icon or press the <b>Enter</b> key. If you see what look like duplicates, they are the same document but some content is found in multiple topic locations within the library.</p>  <p>The screenshot shows the search results page for the keyword 'tapping'. It displays 635 results found. The results are listed as folders with their locations. The folders are: 'Polyethylene Tapping Tee Operation' (Files / ... / Plastic), 'Polyethylene Tapping Tee Operation' (Files / ... / Construction Methods), 'Polyethylene Hot Tapping ___Branching Saddle___' (Files / ... / Plastic), 'Electrofusion Fittings and Tapping Tees' (Files / ... / Applicant Design Manual), and 'Polyethylene Tapping Tee Repair Kits' (Files / ... / Plastic).</p> <p>CORE displays documents and folders that have the search terms in the file name or file content.</p>

## Search Options

Use the Search Options to specify the search area. Select from: All, File Contents, File and Folder Names, or Comments.

Step	Description
1	<p>Click the <b>Search Options</b> icon.</p> 
2	<p>Search a <b>Search Within</b> option and click <b>Search</b>.</p> 
3	<p>Click <b>Clear</b> to remove selected search options.</p> 

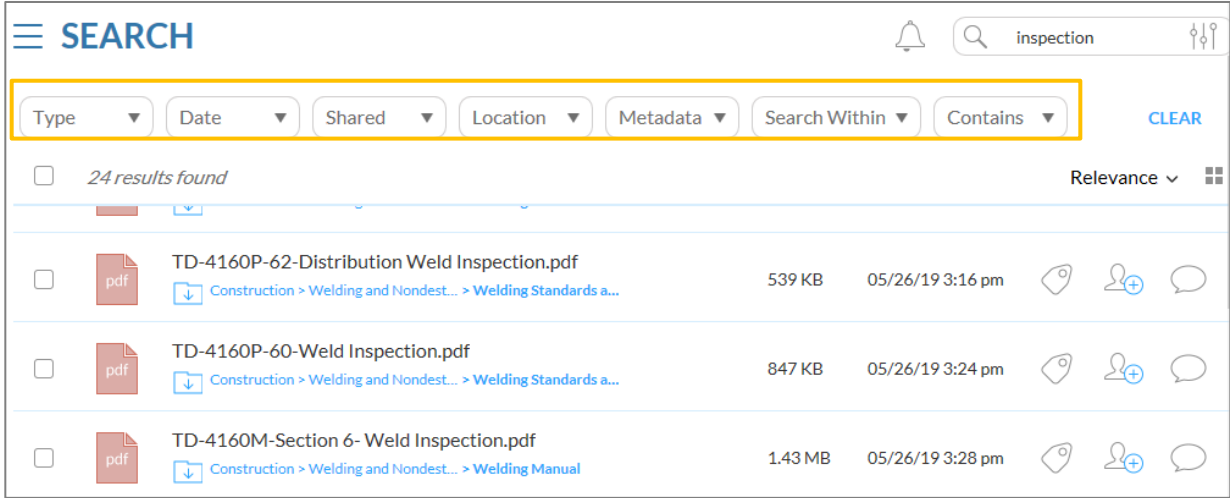
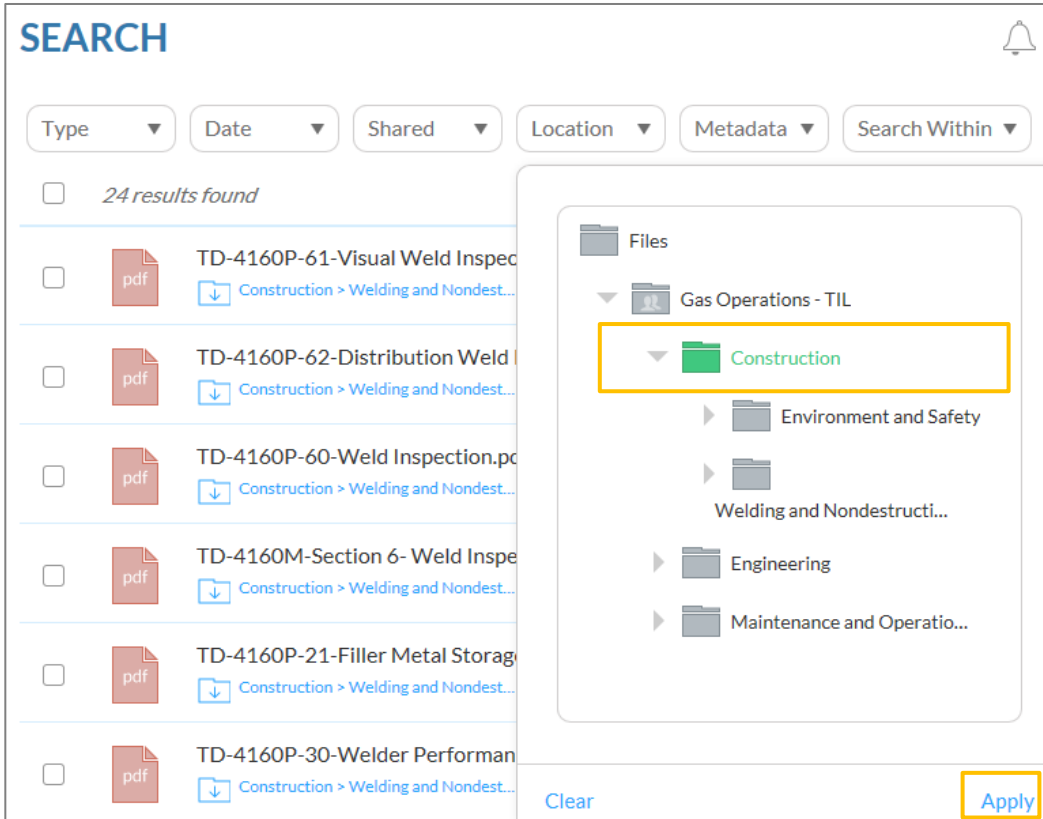


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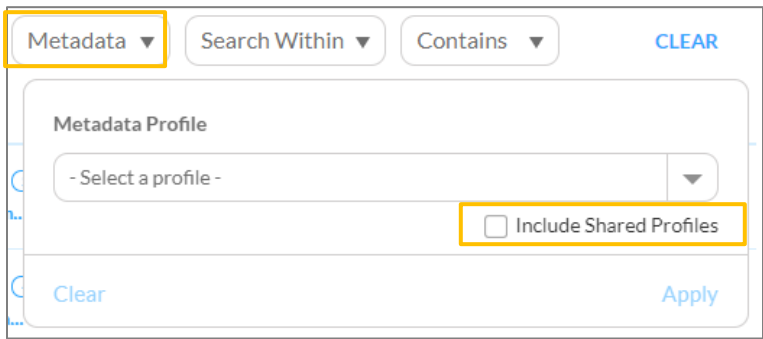
## Filter Search Results

Once you have executed a search, you can use the Filter bar to narrow the search results.

Step	Description																				
1	<p>Select the appropriate filter and filter value.</p>  <p>The screenshot shows a search interface with a search bar containing the text 'inspection'. Below the search bar is a filter bar with several dropdown menus: Type, Date, Shared, Location, Metadata, Search Within, and Contains. A yellow box highlights the filter bar. To the right of the filter bar is a 'CLEAR' button. Below the filter bar, there are search results for '24 results found'. The results are listed in a table with columns for document name, location, size, date, and actions. The first three results are highlighted in blue.</p> <table border="1"><thead><tr><th>Document Name</th><th>Location</th><th>Size</th><th>Date</th><th>Actions</th></tr></thead><tbody><tr><td>TD-4160P-62-Distribution Weld Inspection.pdf</td><td>Construction &gt; Welding and Nondest... &gt; Welding Standards a...</td><td>539 KB</td><td>05/26/19 3:16 pm</td><td>Location, Share, Comment</td></tr><tr><td>TD-4160P-60-Weld Inspection.pdf</td><td>Construction &gt; Welding and Nondest... &gt; Welding Standards a...</td><td>847 KB</td><td>05/26/19 3:24 pm</td><td>Location, Share, Comment</td></tr><tr><td>TD-4160M-Section 6- Weld Inspection.pdf</td><td>Construction &gt; Welding and Nondest... &gt; Welding Manual</td><td>1.43 MB</td><td>05/26/19 3:28 pm</td><td>Location, Share, Comment</td></tr></tbody></table>	Document Name	Location	Size	Date	Actions	TD-4160P-62-Distribution Weld Inspection.pdf	Construction > Welding and Nondest... > Welding Standards a...	539 KB	05/26/19 3:16 pm	Location, Share, Comment	TD-4160P-60-Weld Inspection.pdf	Construction > Welding and Nondest... > Welding Standards a...	847 KB	05/26/19 3:24 pm	Location, Share, Comment	TD-4160M-Section 6- Weld Inspection.pdf	Construction > Welding and Nondest... > Welding Manual	1.43 MB	05/26/19 3:28 pm	Location, Share, Comment
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2	<p>Select the filter value and click <b>Apply</b>.</p>  <p>The screenshot shows the same search interface as in step 1, but with a dropdown menu open for the 'Location' filter. The dropdown menu shows a hierarchy of folders: Files, Gas Operations - TIL, Construction (highlighted in yellow), Environment and Safety, Welding and Nondestructi..., Engineering, and Maintenance and Operatio... The 'Apply' button at the bottom right is also highlighted in yellow.</p>																				

## Filter Options

Refer to the table below for Filter option descriptions.

Filter	Description
Type	<p>Filter files based on the file extension.</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>• Inspection.docx (DOCX is the file extension for Microsoft Word documents)</li> <li>• Payroll.XLSX (XLSX is the file extension for Microsoft Excel documents)</li> <li>• Safety Procedures.PDF (PDF is the file extension for Adobe Acrobat files)</li> </ul> <p>Most files, including drawings, are converted to PDF files. Don't use the drawings' filter types (such as .DWG, CAD) to filter. Use the PDF type to filter for drawings.</p>
Date	<p>Filter files based on the Upload Date. The CORE document date is the date when the document was uploaded, not the last Modified date.</p>
Shared	<p>Filter for files that were shared with you. Search based on who shared the folders with you or who the folders have been shared to.</p> <p>Most folders are from Documentum. CORE lists the "System User" as the person who shared the documents with you.</p>
Location	<p>Filter your search results to display documents in a specific folder. Use when you know the folder name that contains that documents you need. You can only select one folder at a time.</p>
Metadata	<p>Filter to display documents that contain meta data fields that have been synced over from Documentum. Once you select the correct profile of meta data, you can see the attributes. Currently, CORE filters using a "Contains" logic. All the same syntaxes in the search bar are acknowledged.</p> <p>For performance reasons, PG&amp;E Internal Users should not select <b>Include Shared Profiles</b> when using the Metadata search function. By default, it is unchecked. If you do check it, the search function will take longer to run because it will be looking for profiles that have been shared with users by other companies.</p> <p>External Vendors must check <b>Include Shared Profiles</b> to view the PG&amp;E profile, only when doing Metadata searches</p>  <p>The screenshot shows a search interface with a 'Metadata' dropdown menu highlighted in yellow. Below it is a 'Search Within' dropdown and a 'Contains' dropdown. A 'CLEAR' button is visible. The main search area is titled 'Metadata Profile' and contains a dropdown menu with '- Select a profile -'. Below this is a checkbox labeled 'Include Shared Profiles', which is also highlighted in yellow. At the bottom of the search area are 'Clear' and 'Apply' buttons.</p>



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Search Within	Filter to display files that contain the search word(s) or phrase in File Contents, File and Folder Names, and Comments.  The same search is available by clicking the Search Options icon on the Search bar.
Contains	Filter the search results based on Comments, Likes and Links.



# Searching for Documents – Desktop and Mobile (All Users)

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## Search Syntax

Search Type	Enter in the Search bar...	CORE returns...
Single Word Search	Inspection	Files that have the word “Inspection” in the file name or file content.
Multiple Word Search	Welder Performance Qualification	Files that have the words “Welder” or “Performance” or “Qualification” in the file name or file content.
Phrase Search (Include quotation marks)	“Welder Performance Qualification”	Files that have the phrase “Welder Performance Qualification” in the file name or file content
Single Character Wildcard Search	Co?e	Files with the words that start with “Co”, has one wildcard character, and ends with “e” in the file name or content. Example: <u>Co</u> ne, <u>co</u> de, <u>co</u> re
Multiple Character Wildcard Search	Cor*	Files with the words that start with “Cor” in the file name or content. <u>Co</u> rd, <u>cor</u> ner, <u>corp</u> oration
AND operator	Inspection <b>AND</b> Performance	Files with “Inspection” and “Performance” in the file name and file content
OR operator	Inspection <b>OR</b> Performance	Files with “Inspection” or “Performance” in the file name and file content
NOT operator	Inspection <b>NOT</b> Performance	Files with “Inspection” but not “Performance” in the file name and file content
Grouped Operators	Inspection <b>AND</b> Performance <b>NOT</b> Qualification	Files with “Inspection” and “Performance”, but NOT “Qualification” in the file name and file content
Proximity (Include quotation marks and tilde~1)	“Welder Performance”~1	Files with the search phrase “Welder Performance” in the file name or file content, in the same or different order (not next to each other)
Fuzzy (Include quotation marks and tilde, followed by a number)	“Inspection”~2	Files with search phrases that are misspelled or otherwise out of content. In the other words, the phrase is “close” to the search phrase.  The number following the tilde determines the level of leniency CORE uses when including possible misspelled words in the filter results. Higher numbers mean that CORE will be more lenient and include more possibilities in the filter results.