Curtin University

Saving and Retrieving Electronic Documents (Mac)

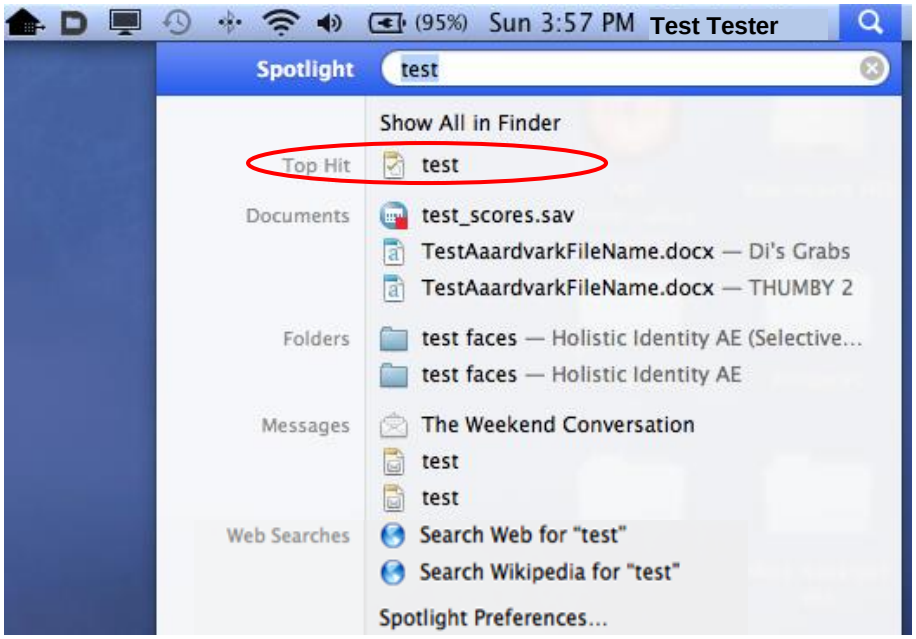
The more electronic documents we create, the more challenging it is to find them again. This sheet provides tips on how to save documents and how to search for them.

Saving Electronic Documents

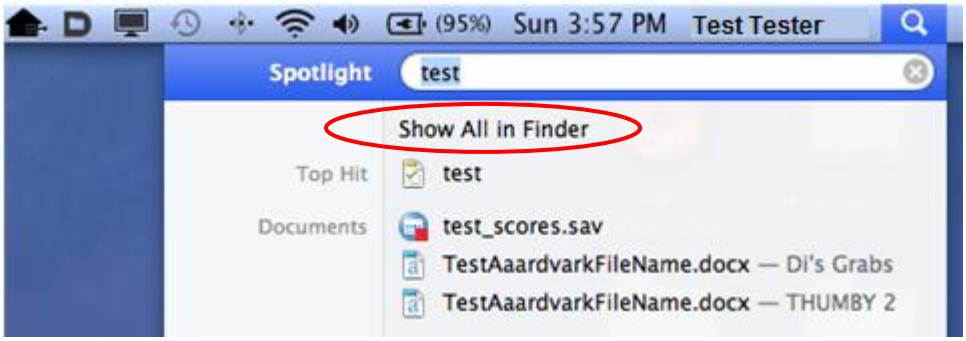
- Save University documents on shared drives (eg J drive) or in other approved University recordkeeping systems (eg Finance 1). They should **not** be stored on the Mac's internal hard drive, thumbdrives, or external drives as these are not secure, nor are they backed up.
- Save University business emails to shared email mailboxes or on shared drives (save as outlook .msg files in the case of saving on shared drives).
- File documents into subject or topic based folders.
- Follow Curtin's Document Naming Guidelines when creating electronic documents.
- Make sure your folder names are short and to the point. The folder information is actually part of the document name. The further down the folder structure a file is, the longer its full name will be. **Long file names can lead to problems opening, saving, copying, backing up or restoring your document.**
- Include the document file path in the document footer so that it can be found more easily.

Retrieving Electronic Documents – Mac Users (Os X Lion)

Spotlight search: Enter a keyword into the Spotlight search field - . This search will find folders, documents, emails, events, To Do items etc that contain the keyword. Spotlight will group them by type and show the item best matching the keyword as the "Top Hit".

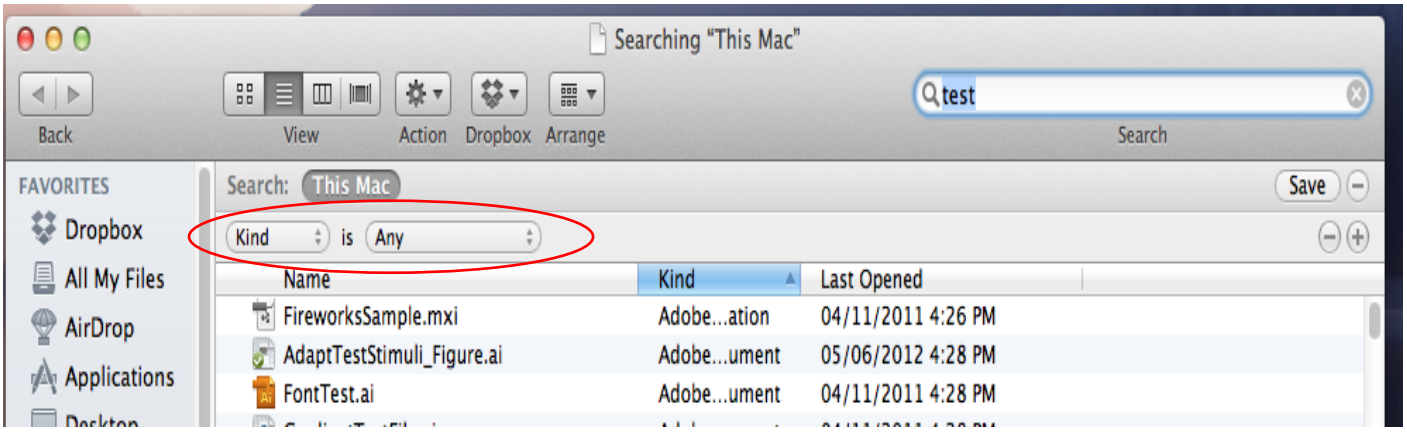


Above the top hit is the option to "Show All in Finder".

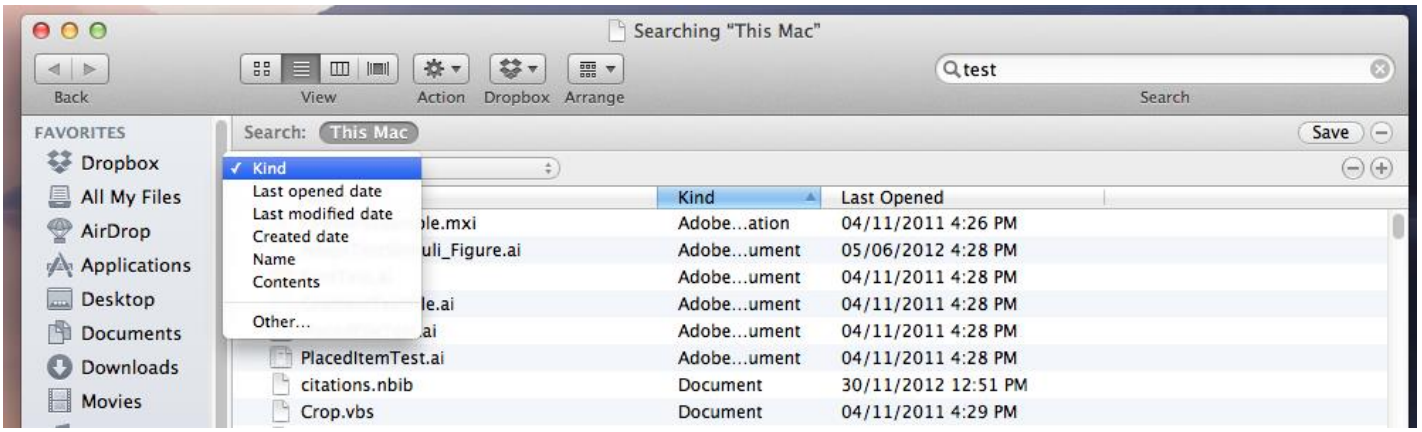


By clicking on “Show All in Finder”, the Finder window will open and more options to refine the search will be accessible.

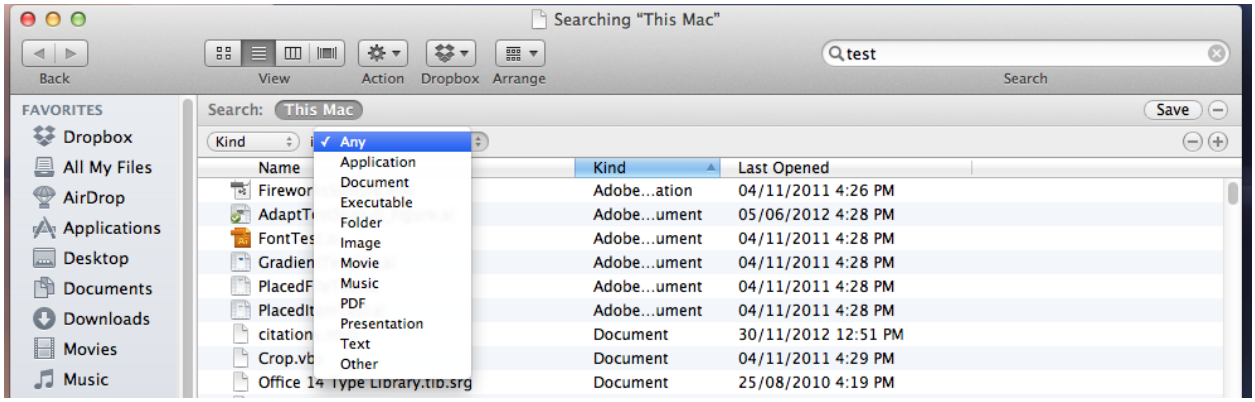
To refine the search, click on the Add (+) button found in the right side of the Finder window (to the right of the Save button). Clicking on this button will reveal more options.



By clicking on the “Kind” button, more options for search criteria will appear.



The by clicking on the “Any” button, then additional choices appear.



Boolean searches are also possible where the search criteria are refined by including and excluding certain words such as **AND** or **OR** – eg by entering **(Sally AND Carla) NOT George** into the search field, the search would pick up documents that contain both the names Sally and Carla, but do not contain George.

Useful links

The following links may be of interest:

http://support.apple.com/kb/ph3695?viewlocale=en_us

http://www.wikihow.com/Search-in-Mail-in-Mac-Os-X-Lion

Retrieving Electronic Documents – Smartphones and Tablets

- iPhone and iPad users with documents saved to their device’s memory, can also search for documents held on those devices via the device’s Spotlight search function.
- For android phone users most android phones come with a built in file manager function. If, not then consider downloading a file manager app.
- Most tablets will have a basic search function or some kind of office manager app can be used to find and manage files (eg Quickoffice for the Samsung Galaxy).

Need assistance?

Please see the following related advice sheets:

- Using a Shared Drive
- Document Naming Guidelines
- Saving and Retrieving Electronic Documents (PC)

For more information please visit the Records & Information Management website at ***rim.curtin.edu.au.***
If you need assistance, please contact us by email at ***rim@curtin.edu.au.***