Table of Contents

Introduction	1
Summary Process	1
Detail Process	1
Quick Search	3
Searching Examples:	3
Advance Search	4
File Dates	5
Document Notes	6
User File Activity	6
Record Management	7
Search on Size	7
Workflow Information	7
More Advanced Options	7
Save	8
Using Saved Searches	8
Considerations	9
Search Bar is not Visible	9
Add-Ons	9
No Results When Searching	10

Introduction

This document will explain how to use the Quick and Advanced search functions in Document Locator.

Summary Process

Quick Search allows for the searching of a character string. Can specify to search a filename, description, profile property, version notes, full text search, and/or workflow comments. Typically, the OR operator is selected if choosing multiple items to search against.

Detail Process

Open Document Locator

Support File Home Share View				- o × ~ 0
← → × ↑ 🖡 > Document Locator > SolutionsInternal > Documents :	Internal Process Documentation > Document Locator > Support			ج ق
DocLocatorSolutions			 ₩ 	Q - Adv. Search Collections Preview
D. Adv: Sarch X Di Nev (B) Open (B) Sarch (Sarch) Sarch (Sarch) Proceeding Prints Sarch Declaration (Sarch) Proceeding Print (B) Sarch (Sarch) Declaration (Sarch) Proceeding Print (Sarch) Declaration (Sarch) Sarch OB File Dates Declaration (Sarch) Document Notes Declaration (Sarch) Verkflow Information Tig Prev Linked Sarch) New orkit Declaration (Sarch) Here Advanced Options Declaration (Sarch)	Neme /	<body> <body></body></body></body></body></body></body></body></body></body></body></body></body></body></body></body></body></body></body></body>	Description This describes how to configure the Kofas Export Connector for DL Use these instructions when the note has been embedded into a document and needs to have a separate ann file create.	

The Quick Search is at the top of the screen and Advance Search will open a selection screen on the left side of the screen.

If the search options are not visible click on the View tab, Options, and select to display the DL Toolbar and DL Adv. Search.

📕 Support											
File	Home	Share	View								
Navigation pane •	Previe	w pane s pane	* * *	Sort by *	 Group by ▼ Add columns ▼ Size all columns to fit 	✓ Item✓ File I✓ Hido	check boxes name extensions Hide selected items	Optio	ons		
	Panes		Layout		Current view		Show/hide	3 11	Change folder and search options		
DL Adv. Se	arch			×			Name /		Adobe Acrobat Create PDF Toolbar	/ersion	Checke
E New	and the second s		Q Searc	h	📌 Quick access		Add Pages via Black Ice_2	~	DL Toolbar	2	
Repositor	v Path to Se	arch:	- Jocare		Desktop	*	Adding Stamps or Notes	~	DL Adv. Search	2	
DocLoca	torSolutions'	\Documen	ts\ 📇		Downloads Documents	Я Я	Black Ice Client Installatio	n_20 orma	17-07-20.docx ation from Conversion 2017-07-3	1 1	

Quick Search

Use the DL Toolbar to conduct a quick search.

Locator Search Bar File Home Share View	SolutionsInternal > Searches	> My Searches → Locator Search Bar								× 0 - • • • • • • • • • • • • • • • • • •
2 SolutionsInternal						Note			 9	Adv. Search Collections Preview
DL Adv. Search Search Search DL Adv. Search Search Repeatery Path to Search Declaration Vocument's In All or part of the file name: User Words or phrase in the file: Words or phrase in the file:	Quick access Desktop Downloads Downents Pictures dot Lem	Name / Create separate note in Blac Kofac Capture training note * * *	Version Checked Out By 2 9	Description Use these instr Notes-to-date:	Profile Generic Docu Documents	Modified 8/31/2017 11:38:30 AM 10/12/2016 4:39:26 PM	Size 281 KB 27.4 KB	Path SolutionsInter SolutionsInter		Filenames and Extensions Descriptions Version Notes All Property Values Full Text Indexing Workflow Comments Search Using OR Operator

The repository to be searched is shown in the left input field—can be changed if you have more than one repository. Use the folder to the right of the field to narrow down the search area.

DocLocatorSolutions			
 ✓ Quick access ☑ Document Locat ✓ Desktop 	ID ^ Documents Projects Recycle Bin Recycle Bin	Description User Documents Container Projects Description Deleted Documents Container SOL Renorting Services Reports	Browse For Folder X Browse for Folder
Downloads Documents Pictures company (\\calc + boppedal (\\calc + Packages (\\calc + Renewal Postcar +	Repository Configura	Administration Tools For Repository Saved Searches Container Workflow Tasks and Messages	
det *			Claims Processing Secondary Roads Compensation Board To view subfolders, click the symbol next to a folder. Make New Folder OK Cancel

Remember if you change the path here, to change it back to Documents when finished or you may not get the results you expect next time you search.

Enter in the text to be searched for.

Use the drop down arrow next to the search icon to dictate where to look for the text specified.

The Quick Search is not case sensitive.

A wild card is not needed to do a character string search but **can be** used to do a more specific search. The wild card is an *.

Searching Examples:

County will return all items that have county anywhere within the guidelines selected in the dropdown options. County* will return items that begin with the word county within the guidelines selected in the dropdown options.

*county will return items that end with the word county within the guidelines selected in the dropdown options.

These examples also apply when using the Advance Search feature.

"Solutions" Image Services

Searching Document Locator

Advance Search

To narrow down the search, use the Advance Search option.



Once a profile is selected, the selection property will change accordingly. In the sample to the right, the profile Motor Vehicles was selected, and the properties shown are the index fields for motor vehicles.

Profile:			_
Motor Vehicles			-
Property	Operator	Value(s)	
Title Number	=	AH12345	•
Plate Number	=		
VIN Number	=		
Owner Name	=		
Motor Vehicle Doc Type	=		
1			
Search On File Dates			ः

To search for any of the property values, select the appropriate operator (in this sample it is equal to) and enter in the value to search for.

Click on the Operator to change as needed.

Profile:						
Motor Vehicles						
Property	Operator	Value(s)				
Title Number	= •					
Plate Number	=	5				
VIN Number	1×					
Owner Name	< >=					
Motor Vehicle Doc Type	<=					
<u> </u>	Like					
Search On File Dates						
Document Notes						

You may search by various criteria using the remaining options.

File Dates

Use this option to search by various dates.

Search On File Dates		۲
Select File Date:	Operation:	
- Select Date -	Equals	•
9 / 7 /2017	N	•
	45	

Use the drop down on Select File Date to choose from several different date types.

Search On File Dates		٢
Select File Date:	Operation:	
- Select Date -	Equals	-
- Select Date - File Created	AV3	•
Last Accessed Last Updated		_
D Checked Out Version Created		۲
U Workflow Requested	<u>~</u>	٢
Record Management		٢

File Imported is the date the document was scanned, imported, or dragged and dropped into Document Locator.

Document Notes

Document Notes	2			٢
, Description:				
Version Notes:				
Document Notes:				
1				~

Use these fields to search Descriptions, Version Notes or Documents Notes that may have been keyed in by users.

The rest of the fields shown are seldom used but are available to further narrow down a search.

User File Activity

User File Activity	٢
Checked Out By:	
Last Updated By:	
Last Accessed By:	
Created By:	
3	

Page 6 Copyright © 1986, 2017 "Solutions", Inc.

Record Management



Search on Size

Bearch on Size		٢
>= 💌	КВ	

Workflow Information

Workflow Information	۲
Route Name:	
Workflow Step Name:	
Workflow Participant:	
I Workflow Comments:	
Workflow Submitted By:	
Workflow Active	
Workflow Step Active	

More Advanced Options

More Advanced Options	۲
Version History:	
- Select Version -	-
 In the last n days In the last n files 	
 Non Versioned Files Compressed Files Dependent Master Files Dependent Child Files Rendered PDF Files Search All Sub Folders Template Files Block Security Configured 	

Enter in your search criteria. Click on the Search icon in the Advance Search box.

Page 7 Copyright © 1986, 2017 "Solutions", Inc.

Save

Advance Searches can be saved. You may want to save a search if you find yourself using it often. Save the preferred search by clicking on Save, Name the Search.



Using Saved Searches

Click on Advance Search, then Open to select a saved search.

🖶 DocLocator	Solutions - Open Search			?	×
Look In:	Searches	-	🖿 📋	🔹 🎫 🔹	•
A alison Al Active Wor Disallowed rea A farrell A Motor Vehicle A re by parcel A Redacted A Solutions A Underground	kflows Il estate by Title Construction Application				
File Name:				Oper	1
Files of Type:	All Files (*.*)		-	Cance	

Saved searches can also be selected directly from the main Document Locator screen.

•				
DocLocatorSolutions				
File Home Share	v	iew		
Image: A state of the state				
← → ~ ↑ 🞁 > Doc	cumer	nt Locator > DocLocatorSol	utions	
SolutionsInternal				
		ID /	Description	
📌 Quick access		Documents	User Documents Container	
Desktop	1	Projects	Projects Description	
Downloads	*	🔞 Recycle Bin	Deleted Documents Container	
Documents	*	Repository Configurat	Administration Tools For Repository	
Distance		Q- Searches	Saved Searches Container	
Pictures	7	Se Workflow	Workflow Tasks and Messages	
dot	- 1			
💂 Icm	*			
Description Destantion				

Double click to select a saved search

Searches						
File Home Share	V	iew				
$\leftarrow \rightarrow \checkmark \uparrow \bigcirc > Do$	cumer	nt Locator > DocLocatorSolutions >	Searches			
2 SolutionsInternal						
	_	SearchName /	Description	Container	Owner	CreatedBy
🖈 Quick access		My Searches	User Specific S	Documents	cssadmin	cssadmin
Desktop	- 1	🔍 alison		Documents	cssadmin	alison
Downloads	*	C All Active Workflows		Documents	cssadmin	alison
		Q Disallowed real estate		Documents	cssadmin	alison
E Distance		🔍 farrell		Documents	cssadmin	alison
Pictures	7	Motor Vehicle by Title		Documents	cssadmin	cssadmin
dot	- *	🔍 re by parcel		Documents	cssadmin	alison
📮 Icm	*	C Redacted		Documents	cssadmin	alison
Renewal Postcards		Q Solutions	AS400 Search	Documents	cssadmin	cssadmin
	<u></u>	Q Underground Construction Ap		Documents	cssadmin	alison
Becky	- 1					

Considerations

Search Bar is not Visible

Click on View, Options and select DL Toolbar/DL Advance Search

Add-Ons

If you are not able to search or cannot open the advance search pane, verify that the Document Locator Add-Ons are enabled in Internet Explorer.

Open an Internet Explorer session

Click on Tools or the gear icon



Verify the DL Toolbar and DL Adv Search add-ons enabled. If they are not, right click and select enable or highlight and click enable at the bottom right of the screen.

"Solutions" Image Services

Searching Document Locator

Manage Add-ons

View and manage your Internet Explorer add-ons

Add-on Types	Name	Publisher	Status	Architecture	Load time	Navigation	^
 Toolbars and Extensions Search Providers Accelerators Tracking Protection 	Adobe Systems, Incorporated Adobe Acrobat Create PDF Tool Adobe Acrobat Create PDF Hel Adobe Acrobat Create PDF Hel	Adobe Systems, Incorpo Adobe Systems, Incorpo Adobe Systems, Incorpo	Enabled Enabled Enabled	32-bit and 32-bit and 32-bit and	0.01 s 0.00 s 0.00 s		
	DL Toolbar DL Adv. Search Microsoft Corporation	ColumbiaSoft Corporati ColumbiaSoft Corporati	Enabled Enabled	32-bit and 32-bit and			

No Results When Searching

When using the Quick Search in Document Locator and getting 'No Results', verify the appropriate types of items to search are selected in the drop down to the right of the toolbar search input field. When selecting multiple items, be sure to also check the 'Search Using Or Operator' so the search is looking in each type of item selected.

DocLocatorSolutions			👻 📙 Test		🗓 🕶 Adv. Search Collections Review
	ID ^	Description			 Filenames and Extensions
📌 Quick access	Documents	User Documents Container		/	Descriptions
🔼 Document Locat 🖈	Projects	Projects Description			Version Notes
📃 Desktop 🛛 🖈	Recycle Bin	Deleted Documents Container			 All Property Values
🕹 Downloads 🛛 🖈	Reports	SQL Reporting Services Reports			Full Text Indexing
Documents	Repository Configura	Administration Tools For Repository			Workflow Comments
Distance of	C Searches	Saved Searches Container		\	 Search Using OR Operator
Pictures y	O Workflow	Workflow Tasks and Messages		· ·	

When using the Advance Search in Document Locator, make sure you have the character string in the appropriate field—Filename, Word or Phrase in the file, the path is correct. Also verify you are looking in the correct profile if one is specified.

File Home Share View	
🔶 🚽 🕆 📜 > Document Locator > SolutionsInterna	
Document locator	
bocumenteotator	
DL Adv. Search	
🖺 New 🔄 Open 🖬 Save 🔍 Search	
Repository Path to Search:	
DocumentLocator\Documents\	1
All or part of the file name:	1
Uke 💌	- 1
Words or phrase in the file:	
Profile:	- 1
Property Constant Value(c)	1
Any Property Like	1
	1
Forwerk On Ella Datas	
Dowment Notes	
User File Activity	
Record Management	
Search on Size	
Workflow Information	
More Advanced Options	
Ŭ	