

“Solutions” Image Services

Searching Document Locator

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Introduction

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

Summary Process

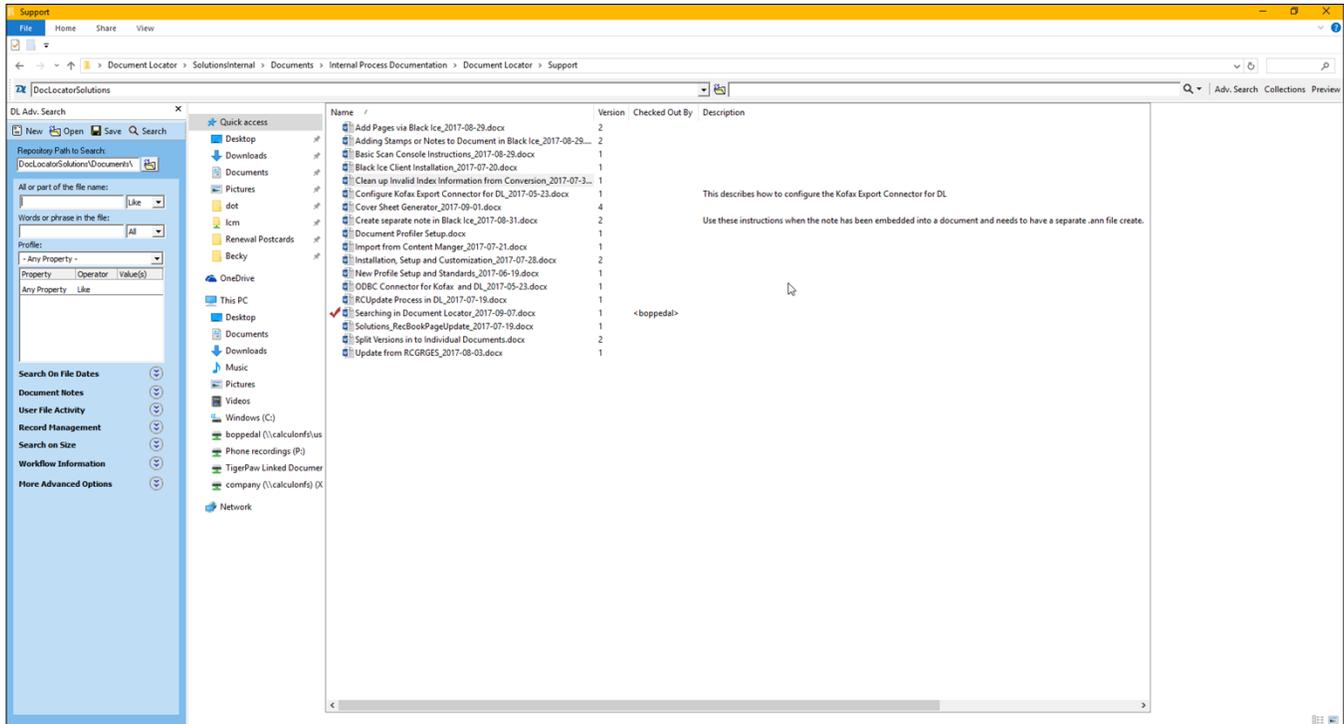
Quick Search allows for the searching of a character string. Can specify to search a filename, description, profile property, version notes, full text search, and/or workflow comments. Typically, the OR operator is selected if choosing multiple items to search against.

Detail Process

Open Document Locator

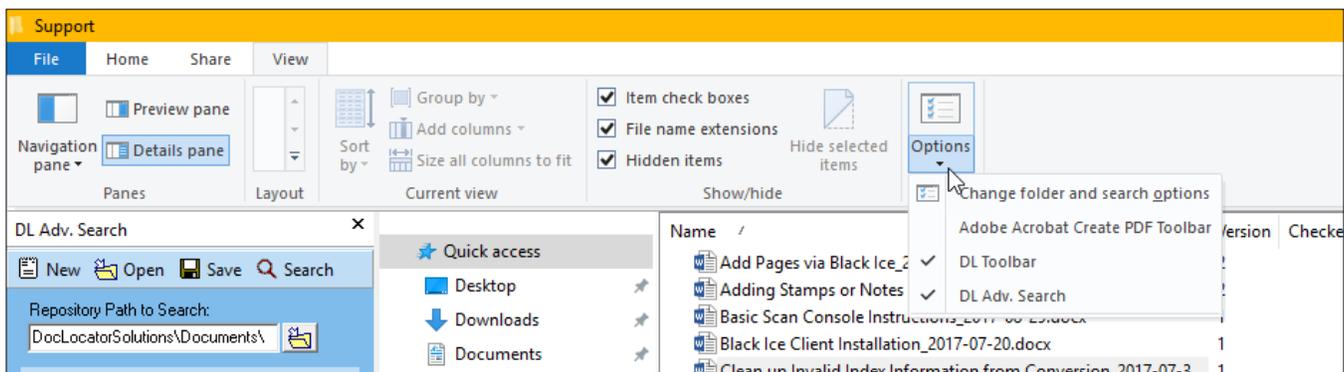
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The Quick Search is at the top of the screen and Advance Search will open a selection screen on the left side of the screen.

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

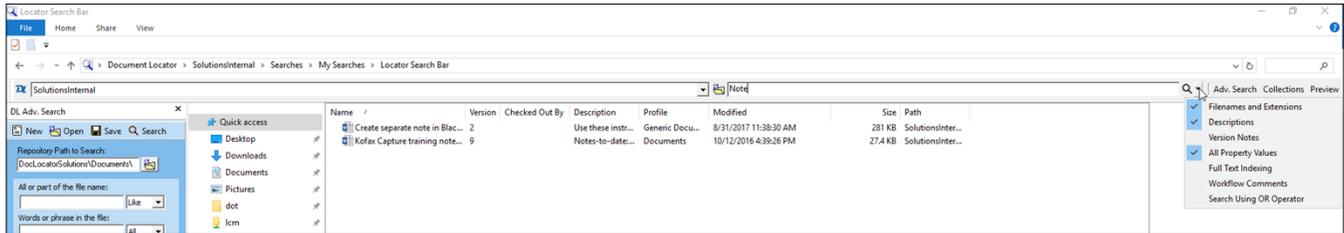


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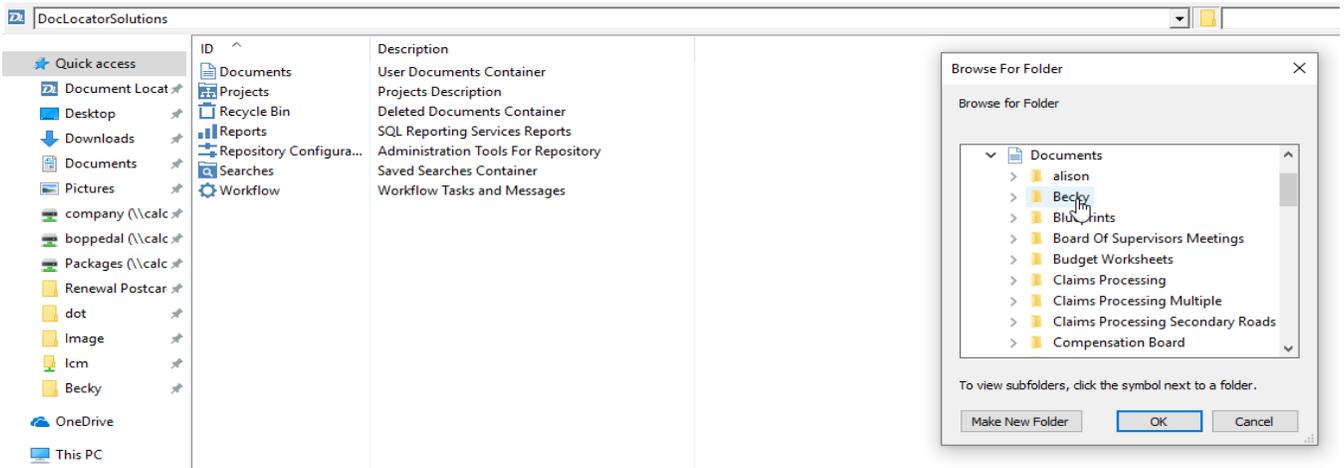
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Quick Search

Use the DL Toolbar to conduct a quick search.



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.



*****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.

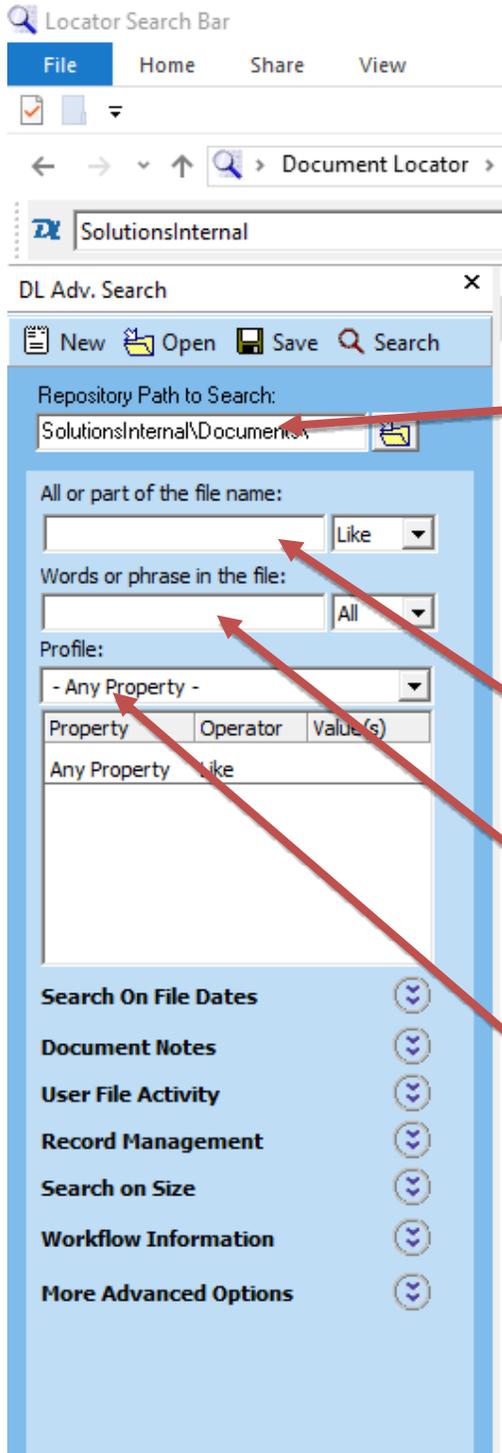
These examples also apply when using the Advance Search feature.

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Advance Search

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

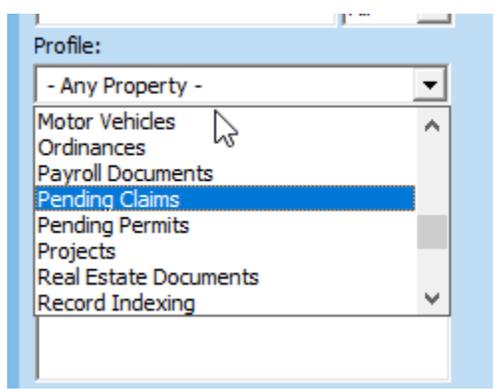
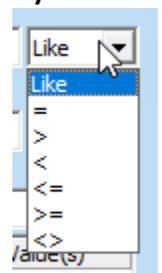


The repository to be searched is shown. Can be changed if you have more than one repository. Or, you can browse to a specific folder. *****Remember if you change the path here, to change it back to Documents when finished or you may not get the results you expect next time you search.*****

Specify a character string that is part of a file name. The default is 'Like' but can be changed as necessary. Search for a specific document type by entering in *.pdf for example or exclude folders by entering *.fod and changing the operator to <>

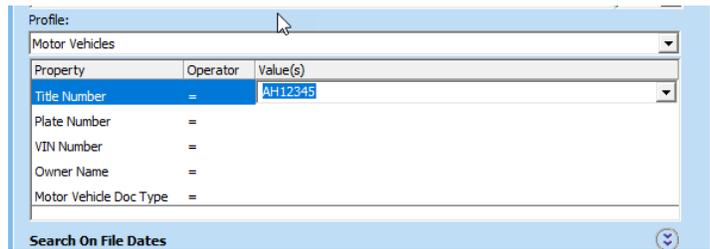
Specify a character string within a file. See samples in the [Searching Examples](#) section.

Change the profile to only search within a specific profile.



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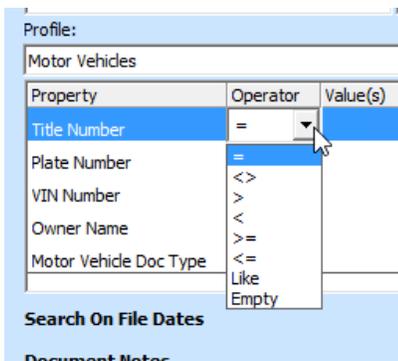
Once a profile is selected, the selection property will change accordingly. In the sample to the right, the profile Motor Vehicles was selected, and the properties shown are the index fields for motor vehicles.



Property	Operator	Value(s)
Title Number	=	AH12345
Plate Number	=	
VIN Number	=	
Owner Name	=	
Motor Vehicle Doc Type	=	

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.



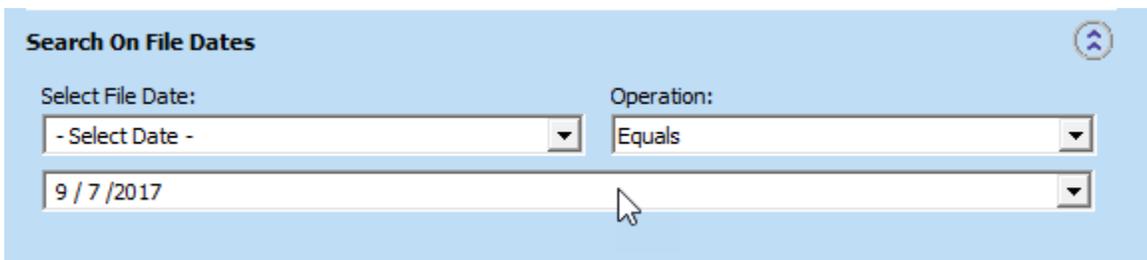
Property	Operator	Value(s)
Title Number	=	
Plate Number	=	
VIN Number	=	
Owner Name	=	
Motor Vehicle Doc Type	=	

Operator options: <>, >, <, >=, <=, Like, Empty

You may search by various criteria using the remaining options.

File Dates

Use this option to search by various dates.



Search On File Dates

Select File Date: - Select Date - Operation: Equals

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

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Search On File Dates

Select File Date: Operation:

- Select Date -
- File Created
- File Imported
- Last Accessed
- Last Updated
- D Checked Out
- Version Created
- U Workflow Requested

Record Management

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

Document Notes

Document Notes

Document Status:

Description:

Version Notes:

Document Notes:

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

Checked Out By:

Last Updated By:

Last Accessed By:

Created By:

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Record Management

Record Management 

Record Policy:

Record Category:

Record Status:

Record Manager:

Record Locked

Search on Size

Search on Size 

KB

Workflow Information

Workflow Information 

Route Name:

Workflow Step Name:

Workflow Participant:

Workflow Comments:

Workflow Submitted By:

Workflow Active
 Workflow Step Active

More Advanced Options

More Advanced Options 

Version History:

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

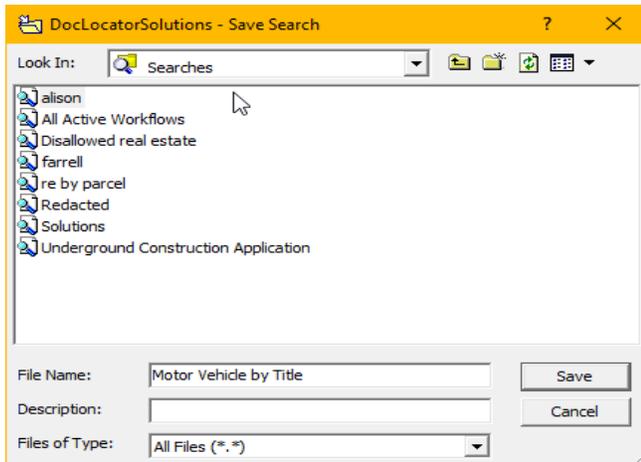
Enter in your search criteria. Click on the Search icon in the Advance Search box.

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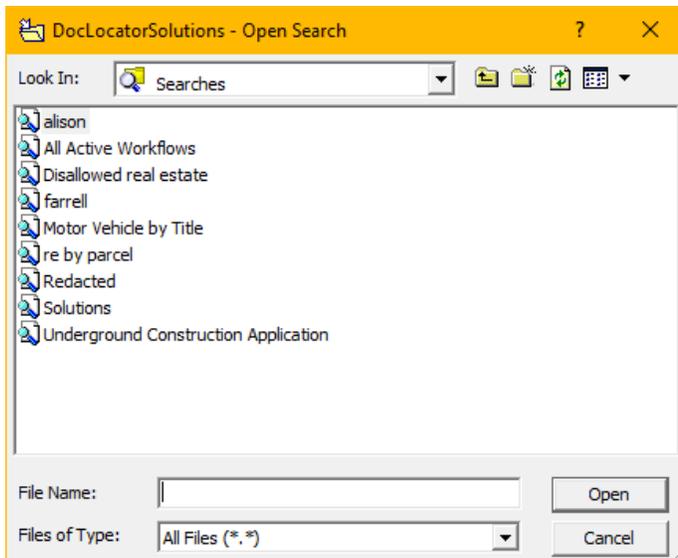
Save

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

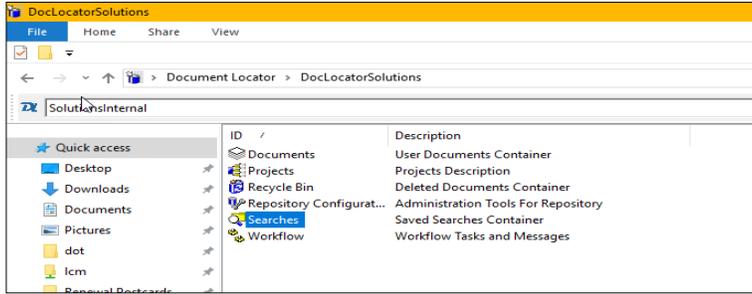
Click on Advance Search, then Open to select a saved search.



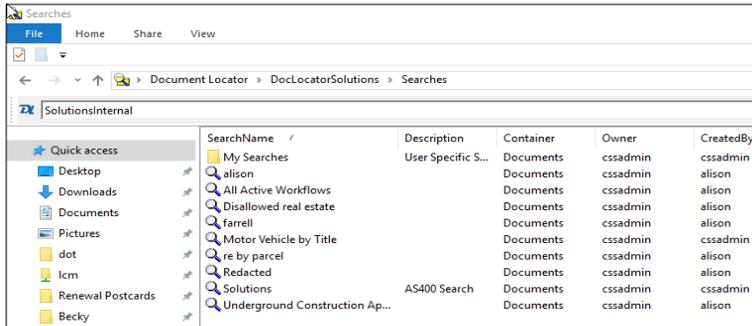
Saved searches can also be selected directly from the main Document Locator screen.

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Double click to select a saved search



Considerations

Search Bar is not Visible

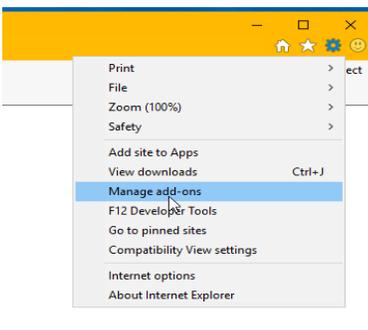
Click on View, Options and select DL Toolbar/DL Advance Search

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.

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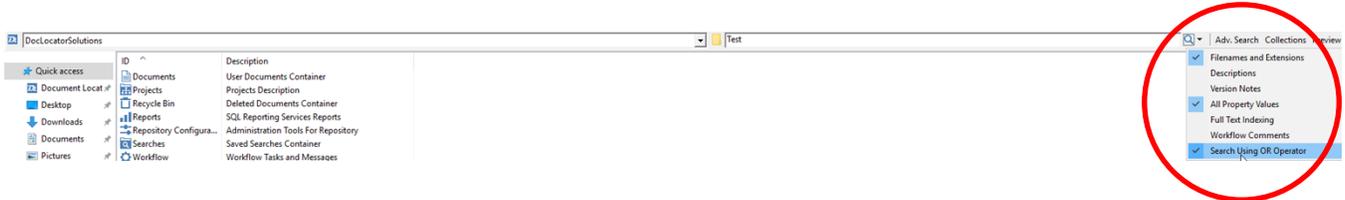
Manage Add-ons

View and manage your Internet Explorer add-ons

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

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.



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.

