

“Solutions” Image Services

Searching Within WebTools or WebView

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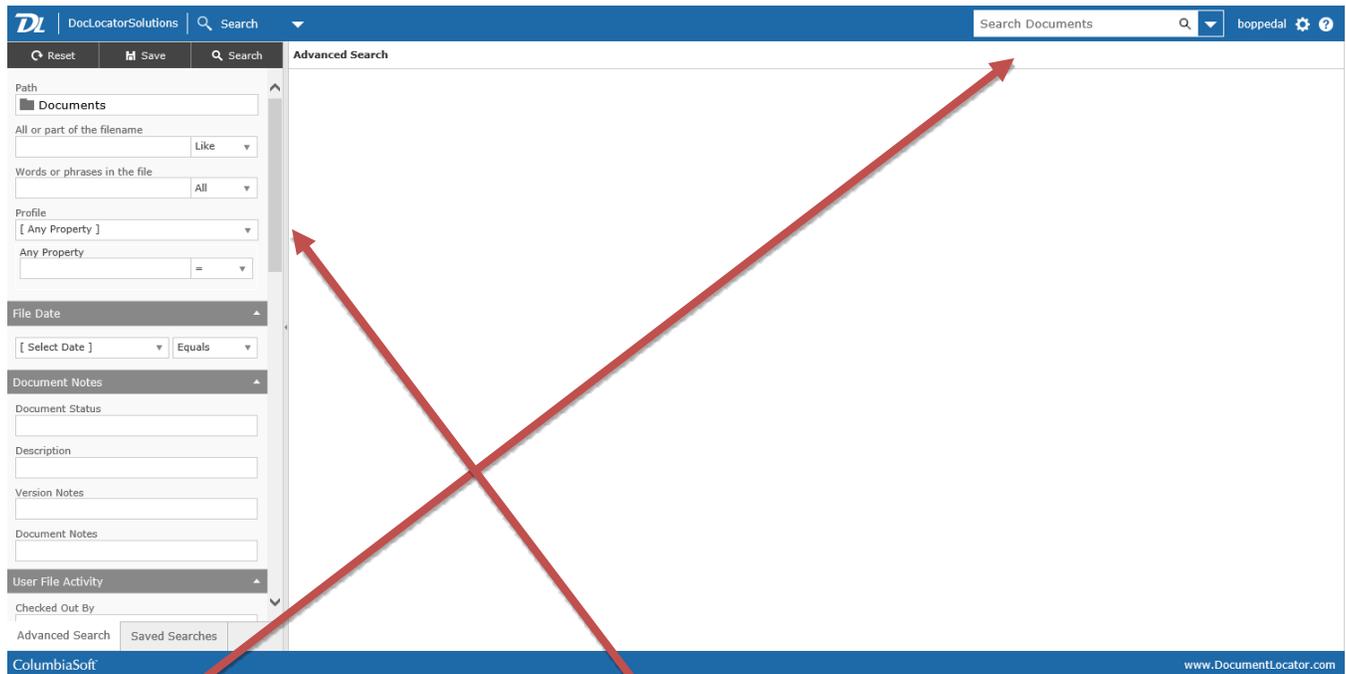
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Introduction

This document will explain how to use the quick and advanced search functions in Document Locator Webtools or WebView.

Processes

Open Document Locator Webtools or WebView (the screens are the same)



The Quick Search is at the top of the screen and Advance Search is on the left side of the screen.

Quick Search

Use the Quick Search to easily find items without drilling down into a specific location.

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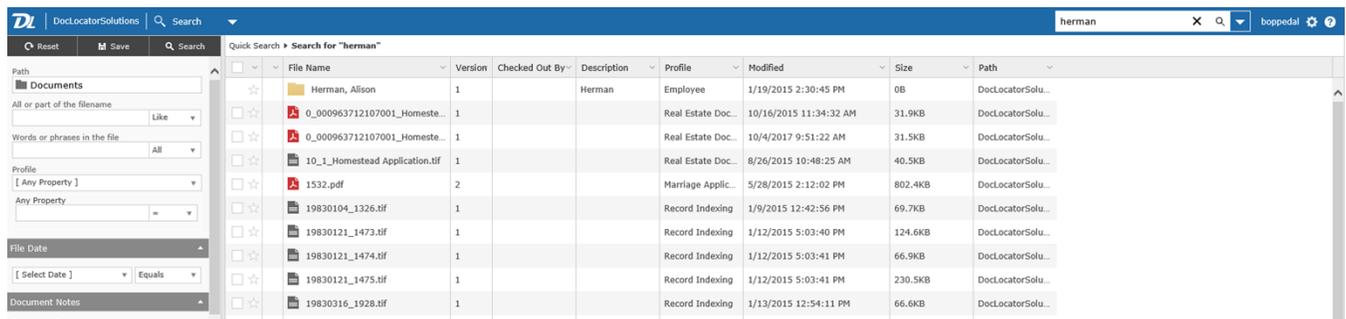


Enter in the text to be searched for.

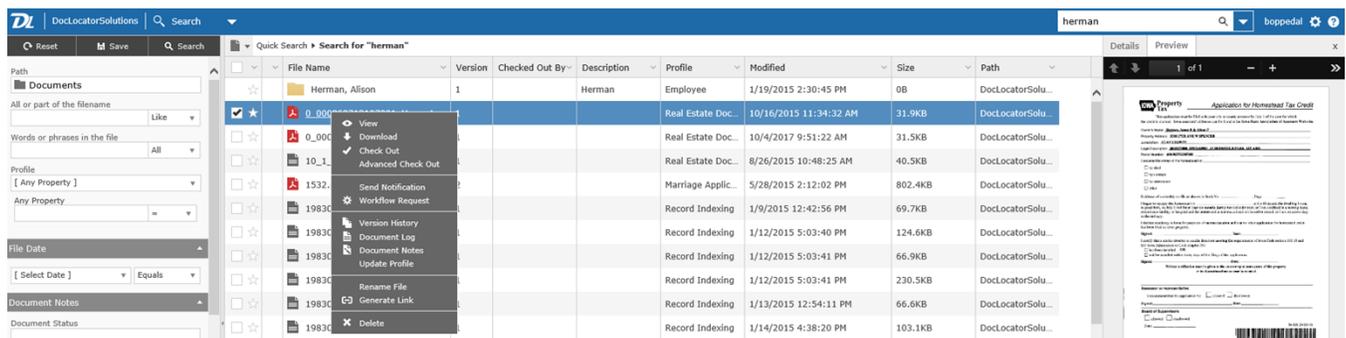
Use the drop-down arrow next to the search icon to dictate where to look for the text specified.

No wildcards are needed as the search will look across the entire repository for the character string entered.

In this example, it returned any items that had the word ‘herman’ contained in it somewhere.



Right click on the document and select view to display the document or click on Preview to show a complete preview of the document to the right.



The options available when you right click will depend on whether you are using Webtools or WebView.

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Advance Search

To conduct a more specific search, use the Advance Search option.

The screenshot shows the DocLocatorSolutions search interface. At the top, there is a blue header with the 'DL' logo, 'DocLocatorSolutions', and a search icon. Below the header is a dark grey bar with 'Reset', 'Save', and 'Search' buttons. The main search area is divided into several sections: 'Path' with a dropdown set to 'Documents'; 'All or part of the filename' with a text input and a 'Like' dropdown; 'Words or phrases in the file' with a text input containing 'herman' and an 'All' dropdown; 'Profile' with a dropdown set to 'Real Estate Documents'; 'Tax District' with a text input and an '=' dropdown; 'Parcel ID' with a text input and an '=' dropdown; 'Real Estate Doc Type' with a dropdown and an '=' dropdown; 'File Date' with a '[Select Date]' dropdown and an 'Equals' dropdown; 'Document Notes' with a 'Document Status' text input and a 'Description' text input; and 'Version Notes' at the bottom.

The repository to be searched is shown.

Specify a character string that is part of a file name. The default is like but changed as necessary.

Specify a character string within a file.

Change the profile to only search within a specific profile.

Once a profile is selected, the selection property will change accordingly. In this sample, the Real Estate Documents profile was selected, and the properties shown are the index fields for this type of document.

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 it as needed.

A dropdown menu showing search operators. The 'Like' option is selected and highlighted in blue. Other options include '=', '>', '<', '<=', '>=', and '<>'.

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File Date ▲

[Select Date] ▼ Equals ▼

Document Notes ▲

Document Status
[Text Input]

Description
[Text Input]

Version Notes
[Text Input]

Document Notes
[Text Input]

User File Activity ▲

Checked Out By
[Text Input]

Last Updated By
[Text Input]

Last Accessed By
[Text Input]

Created By
[Text Input]

Record Management ▲

Record Policy
[Text Input]

Record Category
[Text Input]

Record Status
[Select] ▼

Record Manager
[Text Input]

Record Locked

You may search by various criteria using the remaining options.

Scroll down to see the remaining search options.

Search On Size ▲

>= ▼ [Input] ▲▼ KB

Workflow Information ▲

Route Name
[Text Input]

Route Step Name
[Text Input]

Route Participant
[Text Input]

Workflow Comments
[Text Input]

Workflow Submitted By
[Text Input]

Workflow Active

Workflow Step Active

Advanced Options ▲

Version History
Current Version ▼

In the last [Input] ▲▼ Days ▼

Non Versioned Files

Compressed Files

Dependent Master Files

Dependent Child Files

Rendered PDF Files

Search Sub Folders

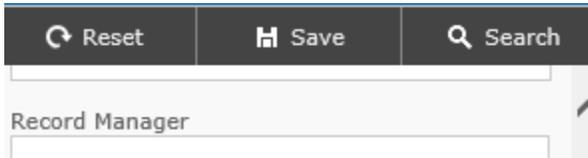
Template Files

Block Security Configured

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If it is a search you will use often, click on Save and then it can be selected to be used repeatedly.



Click on Reset to clear all search fields.

Click on Saved Searches to access a search that has been saved previously.

