

Getting Started with Searching in the Laserfiche 8.2 Client

White Paper

April 2011

Laserfiche®

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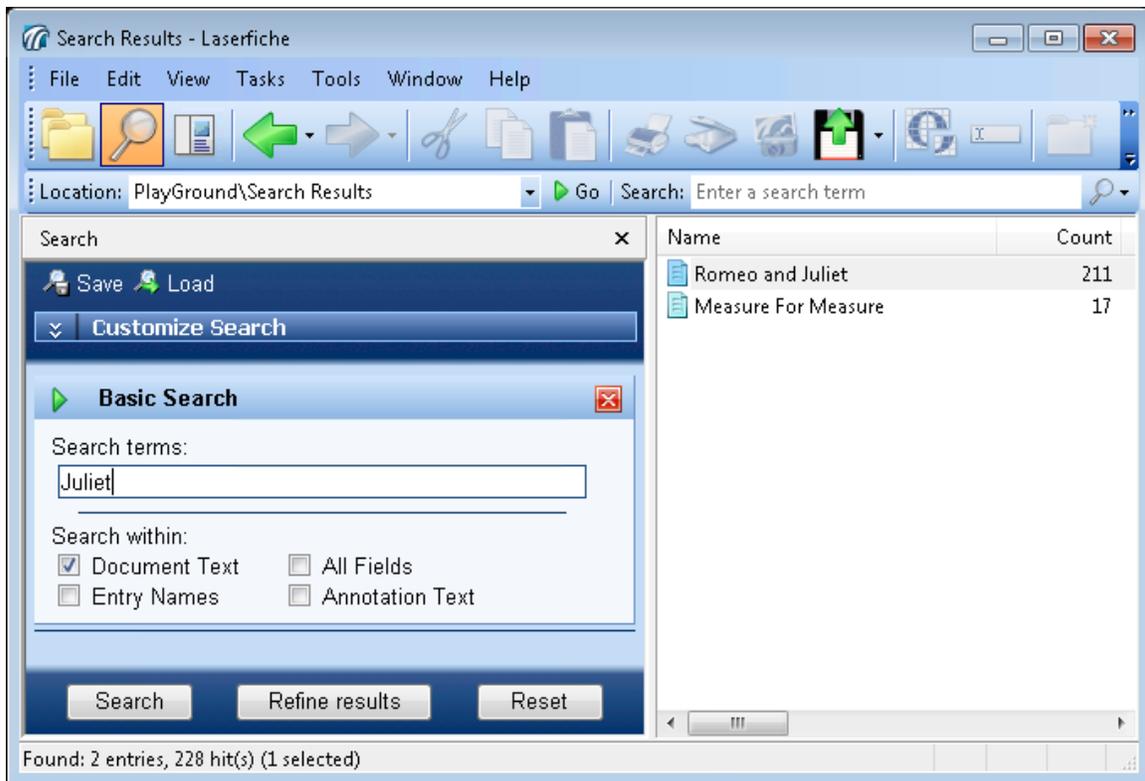
Introduction to Searching

You can quickly locate documents in your Laserfiche repository by searching for them. The Laserfiche Client's Search Pane allows you to search based on a variety of criteria.

To begin, click the **Search** button. This will open the Search Pane on the left where you can configure and view your search criteria; your search results will be returned in the right pane.



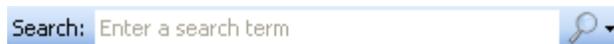
To choose search criteria, click **Customize Search**, select the search type you want to use, and type your search terms in the text box that opens for that search type. You can combine multiple search types to refine your search further. Once you have input your search terms, click the **Search** button to begin searching.



Search Types

Quick Search

A **Quick Search**, located in the Folder Browser, allows you to search text, fields, entry names, annotation text, or a combination of these elements without opening the Search Pane. It is an OR search, meaning one OR the other of the selected criteria must be met. For instance, you could perform a document text and field search for “Shakespeare.” This search will



return all documents that have the word “Shakespeare” in a field, in document text, or in both a field and document text. By default, when using the Quick Search for fields, entry names, and/or annotation text, partial matches will be returned. This means the asterisk (*) wildcard (representing missing or no missing characters) is implied.

Note: Partial matches will not be returned for document text searches within the **Quick Search** unless **Fuzzy search** is enabled. To enable **Fuzzy search** click on **Tools** and select **Options**. Expand the Search node and select **General**. Select the **Use Fuzzy** check box.

When more than one repository is attached to the Client, use the **Choose Repository** drop-down menu to select the repository you want to search. 

Basic Search

The **Basic Search** performs in the same manner and with the same options as the Quick Search. It is the first search type displayed, by default, when opening the Search Pane.



Note: Annotation text searches can only be performed using the Basic or Quick Search.

Note: Partial matches will not be returned for document text searches within the **Basic Search** unless **Fuzzy search** is enabled. To enable **Fuzzy search** click on **Tools** and select **Options**. Expand the Search node and select **General**. Select the **Use Fuzzy** check box.

Within Folder

The **Within Folder** search type returns results located in one or more specified folders. You can combine this search with another search, for instance, document/folder name search, or you can use this search independently to return all entries **within** or **not in** a specific folder.

Click the ... button to browse to the folder. You can search in the **Current folder**, to search in the folder you are currently viewing, or in **Selected folders**. Click the **Add** button to search in additional selected folders. If you select the **Include subfolders** check box, the search will also return results from the selected folders' subfolders.



Field

The **Field Search** searches fields and/or templates assigned to entries in your repository. If you search by template, all of the returned document's template field values will be displayed in columns in the search results. If you search by field, the field values will not be displayed automatically.

- To return all entries that contain a specified field value, select **Search across selected fields**

and select a field from the **Choose Fields** list. You can search for multiple field values at the same time by selecting more than one field in this list. Type the field value you want to find in the text box below the field. This will search all instances of the field regardless if it is included in a template or not.



Note: If you choose to search across fields and do not type anything in the text box below the selected field, you will get an invalid search error.

- To return all entries that have a specified template and/or a specified field value within a template, select **Search by template** and select a template from the drop-down menu. Type the field value(s) you want to find in the text box(es) below fields in the template. The search will return an entry if it has the selected template and has a template field value matching what you typed. If you type search terms in more than one field, the search will return documents only if their template field values match all of the values you typed.

Note: If you search by template but do not type anything in the fields, the search will return all entries with that template.

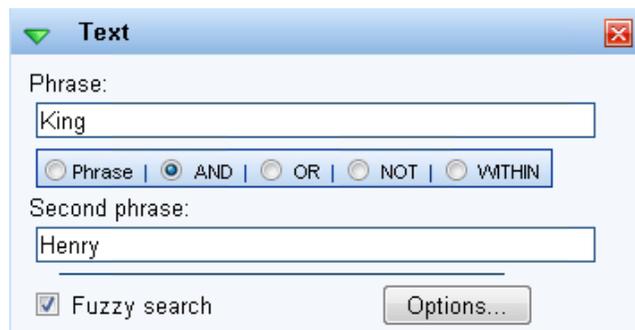
Field searches are useful for finding documents based on the specific kinds of information that you or other users in your organization have configured. For instance, if you keep track of the author of a document using an Author field, you can quickly find all documents by John Smith by searching for documents with “John Smith” in the Author field.

Note: By default, the search will return only exact matches. For example, if you typed “Quinn” in the Author field of the above search, a document with “Quinn Thomas” in the Author field

will not be returned. You can add wildcards to your search to return more than just exact matches.

Text

The **Text** search type allows you to locate words in the text of documents that have text associated with them. This search is useful for ensuring that certain words or phrases are included in or excluded from your search.



There are five different text search options:

- **PHRASE:** Searches for a single word or phrase in the text, much like **Quick Search** or **Basic Search** can be configured to do.
- **AND:** Searches for all documents that contain two specified words or phrases. When you select the **AND** option, a **Second phrase** text box will appear for you to input your second word or phrase. Only documents that contain both words/phrases will be returned
- **OR:** Searches for all documents that contain one of two specified words or phrases. When you select the **OR** option, a **Second phrase** text box will appear for you to input your second word or phrase. For example, if you search for “Dog” **OR** “Cat,” documents will be returned that contain “Dog,” “Cat,” or both “Dog” and “Cat.”
- **NOT:** Searches for all documents that contain the first specified word or phrase but not the second one. When you select the **NOT** option, a **Second phrase** text box will appear for you to input your second word or phrase. This type of text search is useful for focusing your search. For example, you can search for “King” **NOT** “Henry,” and all documents containing “King” will be returned except for the documents with both “King” and “Henry” in them.
- **WITHIN:** Searches for all documents that contain both specified words or phrases within a particular number of words of each other. When you select the **WITHIN** option, a **Second phrase** text box will appear for you to input your second word or phrase. For example, you want to search for documents about professors at Stanford. You can search for documents that have the word “professors” within five words of the word “Stanford.” This search will help you avoid returning documents that talk about professors and Stanford in two unrelated portions of the document.

Modification Date

The **Modification Date** search type allows you to search for documents modified or created during a specific period. You can specify whether you want to search by modification or

creation date by selecting the “Modification Date” or “Creation Date” check boxes. You can type dates in the **From** and **To** options, or you can click the calendar icon to browse to a particular date. If you leave one of the date boxes empty, the search will be open-ended. For instance, if you type a date in the **From** option but not the **To** option, you will retrieve all documents created or modified on or after the date specified in **From**. If you type a date in the **To** option but not the **From** option, you will retrieve all documents created or modified on or before the date specified in **To**.

Note: A **Modification Date** search type includes the start and end dates in the search.

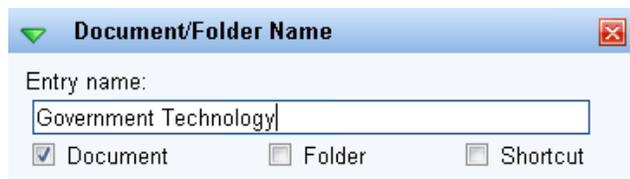


The screenshot shows a dialog box titled "Modification Date". It contains the text "Find documents or folders modified between these dates:". Below this, there are two date input fields: "from" with the value "3/10/2010 12:00:00 AM" and "to" with the value "4/19/2011 11:59:59 PM". Each field has a small calendar icon to its right. At the bottom, there are two checkboxes: "Modification Date" (checked) and "Creation Date" (unchecked).

Document/Folder Name

The **Document/Folder Name** search type allows you to locate entries with a particular name.

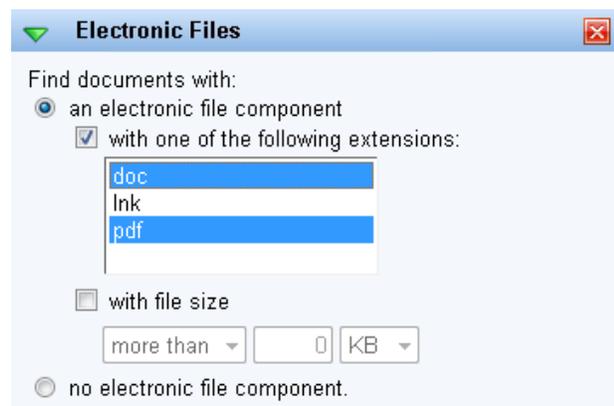
This search type is useful if you remember all or part of the name of the item you want to retrieve. This search type will match the phrase you search for exactly, so you will need to use wildcards to search for part of a document name. (For more information, see “Wildcards,” below.) For instance, searching for “Government Technology” will return documents and folders named “Government Technology,” but will not return a document called “Government Technology 05/07/2008.” Instead, you would need to search for “Government Technology*” to find all documents whose names begin with the words Government Technology. You can also specify to return documents only, folders only, shortcuts only, or some combination of these entries.



The screenshot shows a dialog box titled "Document/Folder Name". It contains the text "Entry name:" followed by a text input field containing "Government Technology". Below the input field, there are three checkboxes: "Document" (checked), "Folder" (unchecked), and "Shortcut" (unchecked).

Electronic Files

The **Electronic Files** search type allows you to specify whether you want to retrieve electronic documents only (documents with associated electronic files) or Laserfiche documents with no associated electronic files. If you select **Find documents with an electronic file component**, you can



The screenshot shows a dialog box titled "Electronic Files". It contains the text "Find documents with:". Below this, there are two radio buttons: "an electronic file component" (selected) and "no electronic file component" (unselected). Under the selected radio button, there is a checked checkbox "with one of the following extensions:" followed by a list box containing "doc", "lnk", and "pdf". Below the list box, there is an unchecked checkbox "with file size" followed by a dropdown menu set to "more than", a text input field containing "0", and another dropdown menu set to "KB".

specify the electronic file types you want returned. The **with one of the following extensions** list contains the extensions of all the electronic files on the Laserfiche Server. (To select more than one extension type, hold the CTRL key at the same time as you click on the extensions.) For instance, if you are looking for a report saved as an Excel spreadsheet, you can use this search type to restrict your results to Excel spreadsheets. You can also constrain your search by file size.

Tags

The **Tags** search type allows you to find all documents that have been assigned a particular tag. For instance, you can create a tag to mark items as high priority and search for that tag to locate high-priority documents. This search works with both informational and security tags. If you select

more than one tag, the **Find entries with** option allows you to determine if you want to return documents with at least one of the selected tags or if you want to restrict your search to documents that have all the selected tags. If you use tag comments, you can also search for documents with tag comments containing a certain word or phrase.

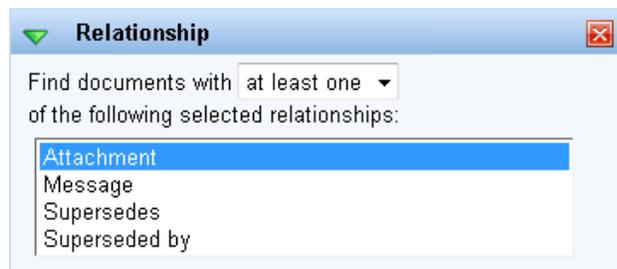


Note: If a user does not have access to a security tag, that tag will not appear in the list.

Relationship

The **Relationship** search type allows you to find all documents with a particular document link relationship. For instance, if you wanted to find all documents that were linked as attachments to e-

mail messages, you could select the "Attachment" link type from the list. The **Find documents with** option allows you to determine if you want to return documents with at least one of the selected links or if you want to restrict your search to documents that have all the selected links.



Version

The **Version** search allows you to search for a particular word or phrase within version comments.



Note: A match will be found if the word or phrase occurs anywhere in the comment. For example, searching for “signed” returns comments with “assigned.” Wildcards are not needed.

User

The **User** search type returns documents created by, owned by, or checked out by a specific user (tracked by user login name). For instance, if you wanted to return a document

Bob created, type “Bob” in the text box and select the **Created By** check box. If searching by creator, the search will return document and folder shortcuts created by the specified user. You can use wildcards with this search type.

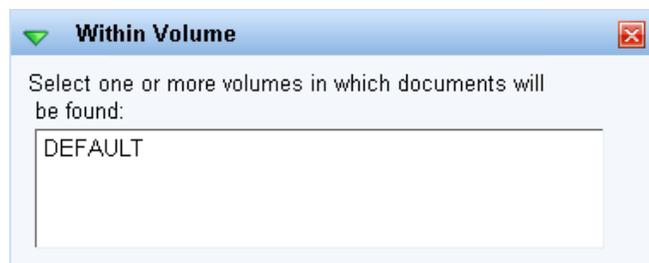


Note: To search for Windows domain accounts use the Domain\Username format.

Within Volume

The **Within Volume** search type returns documents that are in the specified volume or volumes. Select the volume or volumes you want to search within from the list. Select

multiple volumes by holding down the CTRL key. If you select multiple volumes, this search type will perform an OR search.



Pages

The **Pages** search type allows you to search for documents by number of Laserfiche pages and/or by number of Laserfiche pages with OCR'd text on them.

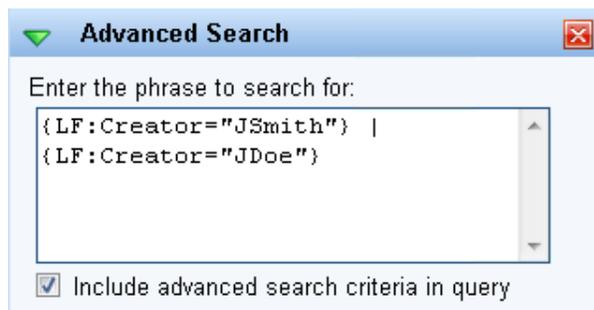


- **Contain** returns all documents that have **more than, exactly, less than, or between** a specified number of imaged pages.
- **Contain OCR'd text on -- pages** allows you to specify whether to return documents with text pages. This search can be important to identify documents that were not OCR'd during the scanning or import process.
 - **no pages:** Only documents with no generated text will be returned.
 - **some:** Documents will be returned if they have generated text for some but not all pages.

- **all**: Documents will be returned if they have text for all pages.

Advanced

The **Advanced** search type allows you to view the advanced search syntax for searches performed. You can also modify the string and/or add your own search syntax to your search by selecting the **Include advanced search criteria in query** check box.



Search Tips

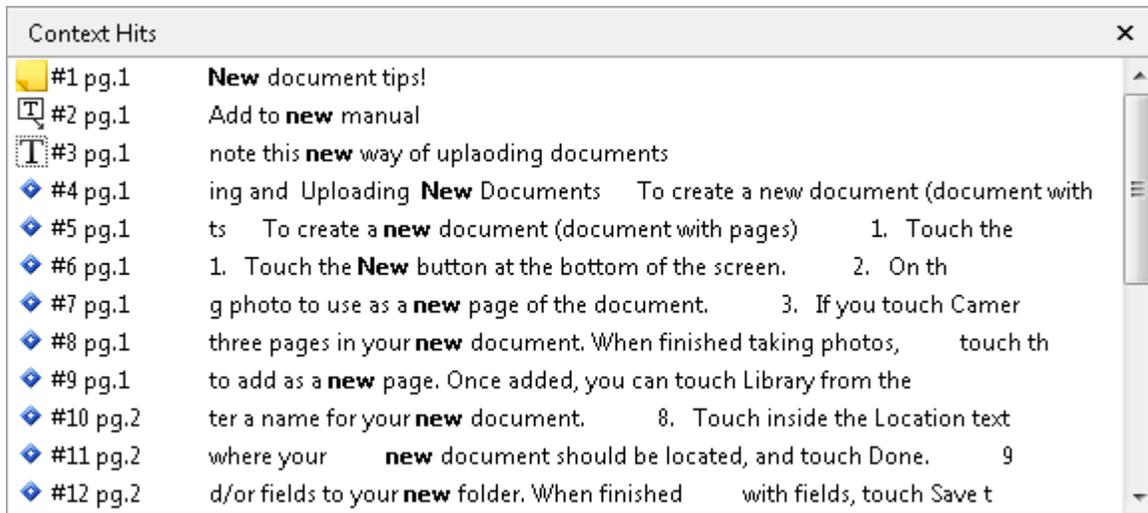
Saving Searches

Saving a search allows you to easily perform the same search multiple times without having to reconfigure search types or terms. For example, you frequently want to find and review product reports that were written by Frank and tagged as urgent. Instead of reconfiguring the User (Frank), Tags (Urgent), and Document Name (*product report*) search types each time you want to find those reports, you can save a search for “Frank’s Urgent Reports.”

To save a search, configure the desired search types and click **Save** at the top of the Search Pane. Enter a name for your search, and click **OK**. To run a saved search, click **Load** at the top of the Search Pane, select a saved search from the list, and click **OK**. The saved search types will appear in the Search Pane. Click **Search** at the bottom of the pane to perform the saved search.

Context Lines

Context lines make it easy to view where search terms occur in a document, to open directly to a search term, and to move quickly between search hits in a document. Annotation searches produce context lines with icons showing the type of annotation.



When you perform a full-text search, the context lines where the term appears in the document will be displayed in the bottom pane of the Search Results window.

Note: By default, context lines are displayed, but they can be toggled on or off. To show or hide context lines, click on **Tools** and select **Options**. Expand the **Search** node, and select **Results Display**. Check or clear the **Show context lines** check box.

Within each context line, the search term and the page number will be bold. The context presented can help you determine if the document or section of the document is what you are looking for. You can double-click on the context lines to open the document. If the result is for a Laserfiche document or an electronic document with imaged pages, double-clicking the context lines will open the Document Viewer and take you directly to the page or annotation with that particular instance of the search term. All instances of the search term will be highlighted in the document, and the instance you used to open the document will be selected. If the search term is in an electronic document without imaged pages, double-clicking on the context line will open the document's text pages and the search term will be highlighted.

You can move forward or backward through the search terms highlighted in a document to scan for the section of the document you are looking for. Click the **F3** key to go to the next hit, or the **SHIFT+F3** key to go to the previous hit. For instance, if you were looking for the line "Farewell, Ophelia; and remember well..." in the play *Hamlet*, you could search for the word "Ophelia" and then select the context line that reads "Farewell, Ophelia...", which will take you to that quote in the document. By clicking **F3**, you could move quickly to the next instances of the word Ophelia until you located the line you were looking for.

Search Within Search Results

Further refine your search results by searching a current set of search results. Searching a set of search results is much quicker than conducting a new search. For example, you are looking for an expense report filed last year. You do a Basic search for “expense report,” but realize that too many entries are returned for you to find the one you want quickly. You can refine the results by adding a Modification Date search for documents created in the last year and clicking **Refine results**. Unlike conducting a new search each time, these “refining” searches only search within the results returned by the “expense report” Basic search.

To search within a set of search results, conduct a search that returns a number of results, edit the search options in the Search Pane, and click **Refine results** at the bottom of the Search Pane.

Relevance Ranking

A search result’s relevance ranking score tells you how well a document matches your search criteria. Each full-text search result is given a relevance ranking score. Sorting by relevance ranking allows you to find quickly the entries you want.

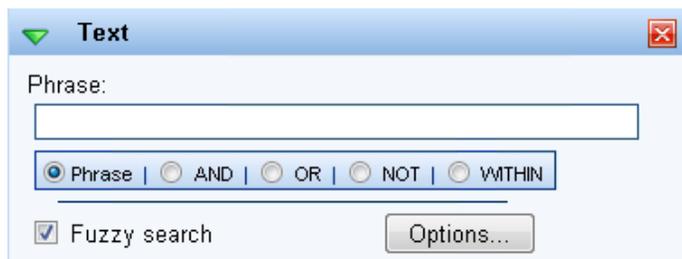
After performing a full-text search, display the **Relevance Ranking** column in the Search Results pane. (This column is shown by default after a full-text search is performed.) The result ranked number 1 is the most relevant entry. Click the column heading to organize your results by relevance.

Fuzzy Search

Fuzzy searches locate both exact matches to the search terms you provide and partial matches. Partial matches have a certain number or percentage of letters in the result that

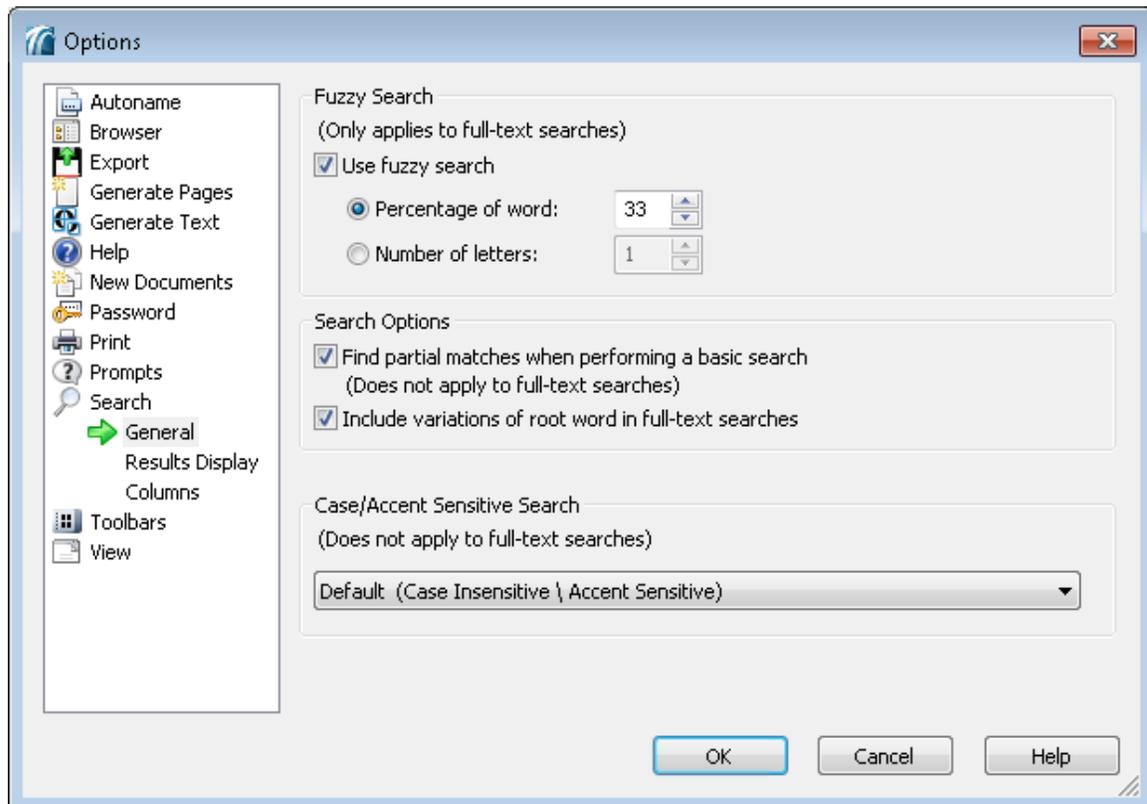
differ from the search term. Fuzzy searches are useful to account for any errors in OCR, uncertainty about the spelling of a word or name, words or names that may be misspelled in the document, or inflected versions of words (such as “swim” and “swam”).

You can perform a fuzzy search by opening the **Text** search type in the Search Pane and selecting the **Fuzzy search** check box. Alternatively, you can enable **Fuzzy search** for all full-text searches by clicking on **Tools** and selecting **Options**. Expand the Search node and select **General**. Check the **Use Fuzzy** check box. In this **Options** dialog box, you can also configure the criteria for the fuzzy search to be based on the number of letters or the percentage of a word that can be different from the search term. If you select **Number of letters**, input the maximum number of letters that can differ from the letters in



your search term and still return a result. If you select **Percentage of word**, input the maximum percentage of letters in the result that can differ from the search term.

Note: Setting a high **Percentage of words** or **Number of letters** that can differ can create a large fuzzy search range. The larger the fuzzy search range, the longer your search.



For instance, you want to locate a document that refers to a particular person. You do not know if the person’s name is spelled “Sandra” or “Sondra,” so you run a fuzzy search and specify that the number of letters can differ by one. That way, regardless of whether you input “Sandra” or “Sondra,” you will be able to find the document. You will not, however, be able to find documents that refer to the person by her nickname, “Sandy.” To return “Sandy,” you need to increase the number of letters that can differ to two.

Note: Fuzzy searches can take significantly longer than regular searches and may turn up less relevant search results. It is usually best to try a regular search first and use the fuzzy search only if the regular search does not return the results you need.

Wildcards

Wildcards, like fuzzy searches, are a way of compensating for inconsistencies between your search terms and the terms in the document you want to locate. Wildcards allow you to set more specific parameters for how words can differ. For instance, you can use wildcards to specify that the second letter in a word, or the ending of the word, may differ from the search term.

- Asterisk (*). The asterisk wildcard represents any number of missing characters, including zero. For instance, a search using the term “report*” will find report, reports, reporting, reported, reporter, etc.
- Question mark (?). The question mark wildcard represents exactly one character. For instance, if you were unsure whether a name was spelled “Anderson” or “Andersen,” you could search using the term “Anders?n.” Using a question mark wildcard in this way would return both results.
- Brackets ([]). Like a question mark, a set of brackets represents a single missing character. However, brackets can be used to specify a smaller range of options. For instance, a search using “d[io]ve” would find the words “dive” and “dove,” but not “Dave.”
- Dash (-). The dash character is used in conjunction with brackets to specify that only characters within a particular range should be found. For instance, you might want to locate all documents that contain an account number that begins with “100347” and ends with a number rather than a letter. You can search using “100347[0-9]” to return account number 10003475 but not 100347C.

Wildcards can be used in combination. For instance, if you wanted to return all documents that referred to writing or written materials, you could search using the term “wr[io]t*.” Using this combination of wildcards will locate any of the following terms: write, written, writing, and wrote.

Records Management Searches

If you have Laserfiche Records Management Edition, you can perform a variety of records searches. The **Select Record Manager Search** option at the top of the Search Pane provides a drop-down menu of records search types.

If you do not need to perform Records Management searches, you can hide this option. To hide the Record Manager search option, click on **Tools** and select **Options**. Expand the **Search** node, and select **General**. Clear the **Show Records Management** check box.

For more information about Records Management searches, see the help files.



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