

WebNow – Searching

Overview

Using WebNow, you can perform a simple search with one condition or you can perform a more advanced search with multiple conditions. These features are available in the Document View of the ImageNow WebNow with the proper search privileges. You must have simple or advanced search privileges to perform either of these types of searches. In addition, if you installed the Content Server agent, which is available as an separate add-on, you can perform full-text searches on your documents.

In a simple search, you can query for documents that contain a DocKey, like Drawer, Folder, Tab, Field 3, Field4, Field 5, or Document Type, or a custom property that matches a condition you supply. Available conditions in a simple search include: is equal to, is not equal to, is greater than, is less than, is greater than or equal to, and is less than or equal to. For example, you can search for all documents linked to Accounts Payable account number 502, all documents of a particular document type, like Invoices, or all documents that contain a custom property that matches the comparison value you supply.

In an advanced search, you can search for documents that meet several different criteria with additional operators, such as contains, does not contain, is null, is not null, starts with, ends with, is not equal, and so on. In addition to searching for DocKey comparisons, in advanced search, you can search for specific document properties, including document version; a specified user who created, checked out, modified, or was the last to view the document; the date of check out, creation, modification, and last view; and the workflow queue, status, user, and item ID. Document status is another category on which you can query to find documents that are in workflow, in a project, version controlled, or checked-out. You can also search all fields for a specific condition. To search for several conditions, separate each condition with an AND or OR operator. Using an advanced search, you can also specify how you want the resulting documents sorted.


As part of the advanced search, when the Content Server is installed, you can perform full-text or natural language queries. Full text queries can include a variety of operators, including: all, and, any, or, near, paragraph, phrase, sentence, and many more. In a natural language query, you can use the freetext and like operators. For a context search, the Content Server agent collects text data (gathered via OCR for scanned images) and creates searchable indexes based on the content of each document page.

Content search enables you to search the content of scanned images and more than 200 popular document formats, including Microsoft Word, Microsoft Excel, WordPerfect, and HTML. Content Server can also gather this information from PDF files.

Search on a single value (Simple)

1. In the **WebNow Explorer**, verify that the **Views** pane is displayed.

How?

- On the **Explorer** toolbar, click the  button to display and hide the **Views** pane.
2. In the **WebNow Explorer**, in the **Views** pane, select **Documents**.
 3. In the **Applet** list, click the Applet that you want to use for searching.

How?

1. On the **WebNow** toolbar, click the **Options** down-arrow, and then click **General**.
 2. On the **General** tab, under **Applet**, in the **Applet** list, select the applet you want to use with WebNow.
4. On the **Simple** tab, in the **Filter where** list, choose one of the following methods:

- Select the DocKey you want to search, including **Drawer**, **Folder**, **Tab**, **Field 3**, **Field 4**, **Field 5**, or **Document Type**.
- Select **ANY DocKey**.
- Select **Custom Property**. In the **Custom Properties** dialog box, in **Document Type**, select a document type to filter the displayed custom properties, under **Property Name**, select a property, and then click **Select**.

Note When displaying the list of index keys, ImageNow shows the captions in the currently selected applet. If no captions are defined, ImageNow displays the default DocKeys (Drawer, Folder, Tab, Field 3, Field 4, Field 5, Scan Date, and Modify Date).

5. To supply the remainder of the search criteria, select an operator, and then type text in the field to compare your criteria.
6. To limit the search to a certain time period, type or select the number of days you want the search to encompass in **and created in last <number> days**. You can also select **any** to return all matching documents without a time limitation.
7. Click **Go**.

Search on multiple values (Advanced)

1. In the **WebNow Explorer**, verify that the **Views** pane is open.

How?

- On the **Explorer** toolbar, click the  button to display and hide the **Views** pane.

2. In the **WebNow Explorer**, in the **Views** pane, select **Documents**.
3. In the **Applet** list, click the Applet that you want to use for searching.

How?

1. On the **WebNow** toolbar, point to **Options**, and then click **General**.
2. On the **General** tab, under **Applet**, in the **Applet** list, select the applet you want to use with WebNow.

4. In the Search area, on the **Advanced** tab, click **Add**.
5. In the **Add Condition** dialog box, in **Condition**, select one of the following options, and then perform the associated tasks:

- **By Document Keys**

1. In **Field**, select a document key.
2. In **Operator**, select a comparison operator, such as **is equal to**, **is LT (<)**, or **NOT IN**.
3. In **Type**, select **Normal** or **Prompted**. If you select **Prompted**, when the search is performed, a **Prompt Conditions** dialog box appears requesting you to enter any missing comparison values.
4. Depending on what you selected for **Type**, do the following:
 - If you selected **Normal**, in **Value**, type the value to which you want the field compared.
 - If you selected **Prompted**, in **Message**, type the text you want to prompt the user to answer.
5. Click **OK**.


- **By Document Properties**

1. In **Field**, select a property of the document, like **Pages** or **Creation Date**.
2. In **Operator**, select a comparison operator, such as **is equal to**, **is LT (<)**, or **NOT IN**.
3. In **Type**, select **Normal** or **Prompted**. If you select **Prompted**, when the search is performed, a **Prompt Conditions** dialog box appears requesting you to enter any missing comparison values.


4. Depending on what you selected for **Type**, do the following:
 - If you selected **Normal**, in **Value**, type the value to which you want the field compared.
 - If you selected **Prompted**, in **Message**, type the text you want to prompt the user to answer.
5. If you selected a date field, select the **Use Local Time** check box to use your local time or clear the check box to use the system time on the ImageNow Server computer.
6. Click **OK**.
- **By Document Status**
 1. In **Field**, select from **Is in Workflow**, **Is in a Project**, **Is Version Controlled**, **Is Checked Out**, **Is Signed**, or **Is Private**.
 2. In **Operator**, select a comparison operator, such as **is equal to** or **is not equal to**.
 3. In **Type**, select **Normal** or **Prompted**. If you select **Prompted**, when the search is performed, a **Prompt Conditions** dialog box appears requesting you to enter any missing comparison values.
 4. Depending on what you selected for **Type**, do the following:
 - If you selected **Normal**, in **Value**, select **True** or **False**.
 - If you selected **Prompted**, in **Message**, type the text you want to prompt the user to answer.
 5. Click **OK**.
- **By All Fields**
 1. In **Field**, select any of the search fields from the list.
 2. **Note** The search fields do not include custom properties. To search custom properties, in **Condition** select **By Custom Property**.
 3. In **Operator**, select a comparison operator, such as **is equal to** or **is GT (>)**.
 4. In **Type**, select **Normal** or **Prompted**. If you select **Prompted**, when the search is performed, a **Prompt Conditions** dialog box appears requesting you to enter any missing comparison values.
 5. Depending on what you selected for **Type**, do the following:
 - If you selected **Normal**, in **Value**, type or select the value to which you want the field compared.
 - If you selected **Prompted**, in **Message**, type the text you want to prompt the user to answer.
 6. If you selected a date field, select the **Use Local Time** check box to use your local time or clear the check box to use the system time on the ImageNow Server computer.
 7. Click **OK**.
- **By Custom Property**
 1. In **Field**, select a custom property from the list.
 2. In **Operator**, select a comparison operator, such as **is equal to** or **is GT (>)**.
 3. In **Type**, select **Normal** or **Prompted**. If you select **Prompted**, when the search is performed, a **Prompt Conditions** dialog box appears requesting you to enter any missing comparison values.
 4. In **Value**, type the value to which you want the field compared.
 5. Click **OK**.
6. Optional. Click **Add** to add another condition. ImageNow places an AND between the two conditions. You can manually change the AND to OR as needed.
7. Optional. To sort the returned documents, click **Sorting**. In the **Sorting** dialog box, do the following:
 - In **Available Fields**, select a field and then click **Add**.
 - In **Sort By**, select the field and choose **Ascending** or **Descending**.
 - Add additional fields as needed.
 - When you are finished, click **OK**.

8. To limit the search to a certain time period, select the number of days you want the search to encompass in **and created in last <number> days**. You can also select **any** to return all matching documents without a time limitation. Also, if you add a constraint that uses the Creation Date field in your query, this option is automatically set to **any**.
9. Click **Go**.

Store a search query


1. In the **WebNow Explorer**, verify that the **Views** pane is displayed.
How?
 - On the **Explorer** toolbar, click the  button to display and hide the **Views** pane.
2. In the **WebNow Explorer**, in the **Views** pane, click **Documents**.
3. In the Documents grid, on any search tab, create the query you want to save.
4. On the **ImageNow Explorer** toolbar, in the query list, click **Save Query**.
5. In the **Save Query** dialog box, in the **Name** box, type a name for your query.
6. Under **Type**, click **User** or **Server**.
7. Click **OK**.

Run a stored search query


1. In the **WebNow Explorer**, verify that the **Views** pane is displayed.
How?
 - On the **Explorer** toolbar, click the  button to display and hide the **Views** pane.
2. In the **Views** pane, select **Documents**.
3. On the **Explorer** toolbar, in the **Query** list, select the query you want to run.

Note If the query you load corresponds to a search type (Simple, Advanced, or Content) other than the one that is active, WebNow switches to the relevant search tab, and then runs the search.

Set a default search query

1. In the **WebNow Explorer**, verify that the **Views** pane is displayed.
How?
 - On the **Explorer** toolbar, click the  button to display and hide the **Views** pane.
2. In the Documents grid, in the **Load Query** list, click **Edit Query List**.
3. In the **Edit Query List** dialog box, in the **Default Query** list, click the stored query you want to set as the default.
4. Click **Close**.

Rename or delete a saved query

1. In the **WebNow Explorer**, verify that the **Views** pane is displayed.
How?
 - On the **Explorer** toolbar, click the  button to display and hide the **Views** pane.
2. In the **Views** pane, select **Documents**.

3. On the **Explorer** toolbar, in the **Query** list, select **Edit Query List**.
4. In the **Edit Query List** dialog box, click the query you want to edit, and then click **Rename** to give the query a different name or **Remove** to delete that query.
5. Click **Close**.

Set search options

1. On the **WebNow** toolbar, click the **Options** down-arrow, and then click **General**.
2. On the **Explorer Options** dialog box, on the **General** tab, under **Searching**, set the following options:
 - In the **Default search method** list, select **Simple** or **Advanced**.
 - In the **Default search operation** list, select a default operator for searches.
 - In the **Default time constraint (days)**, type or select the default number of days you want the search to encompass.
 - In the **Max number of rows to return** list, type or select the maximum of rows that are returned by the query. This number must be between 100 and 25,000.
3. Click **OK**.