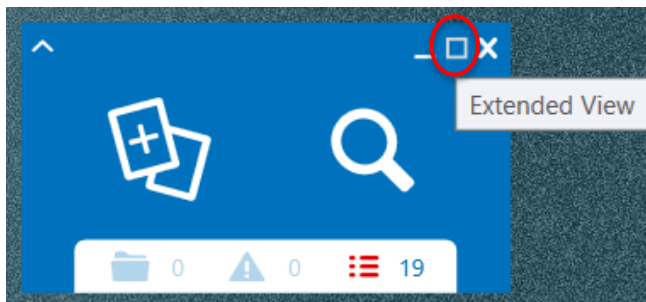


SMARTdoc User Guide-Extended View-Saved Searches

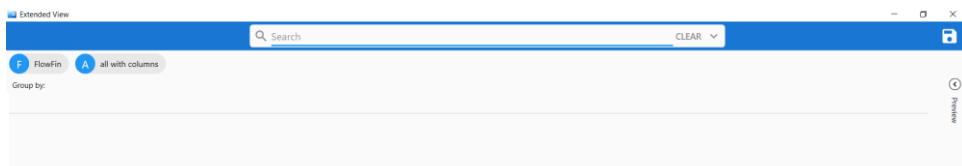
EXTENDED VIEW

GENERAL VIEW

To open the extended view; click the second button on the top right corner of SMARTdoc:



You get this screen:



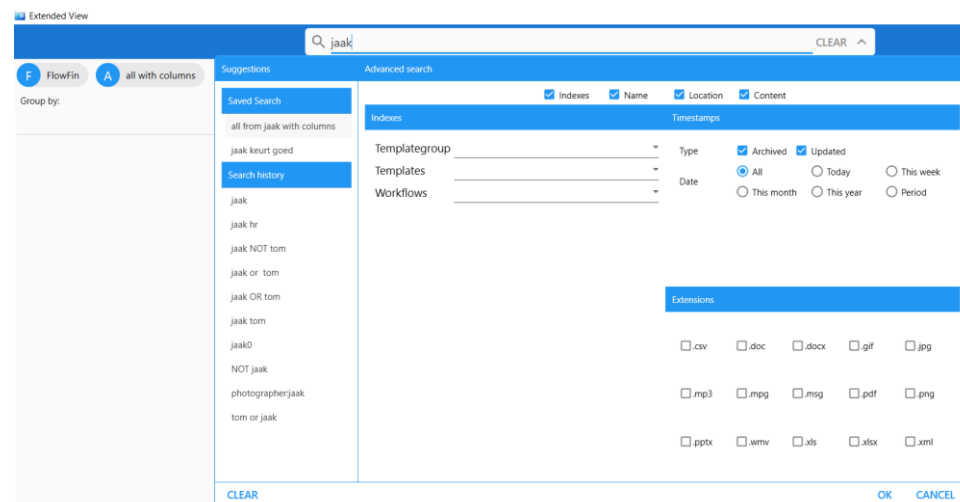
You see a large search area in the middle of the screen, on the right side you see a save icon and below the search area you can see your saved searches (we explain them later).

SEARCH FUNCTION

The easiest way to search an document is using the search area, just type your search term in the box.

When you type text in the search box, a lot of things happen.

You get the screen below:

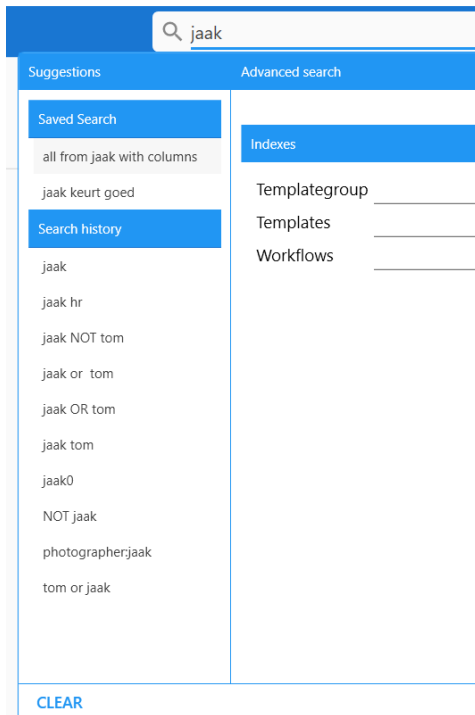


An extra window drops down with a lot of information:

- First you can select what you want to search on: indexes, name, location, content. Standard all options are selected.
- On the left side you get your search history.

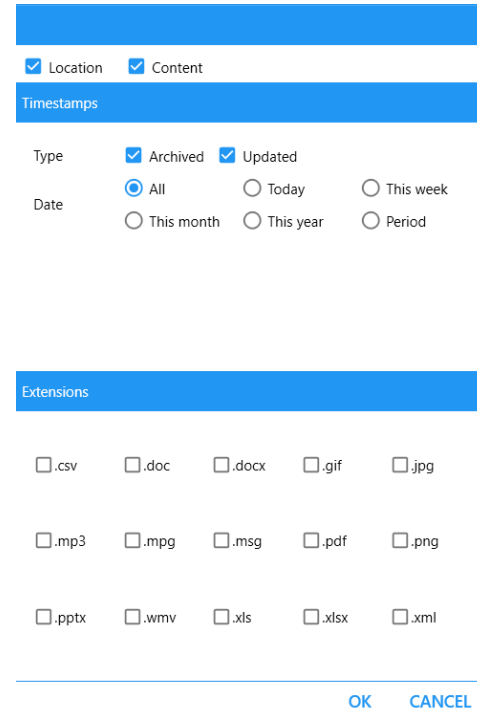
SMARTdoc User Guide-Extended View-Saved Searches

- If you have saved searches, you also see them on the left side of the drop down screen:



- In the middle of the screen, you can look for specific templates, template groups and workflows

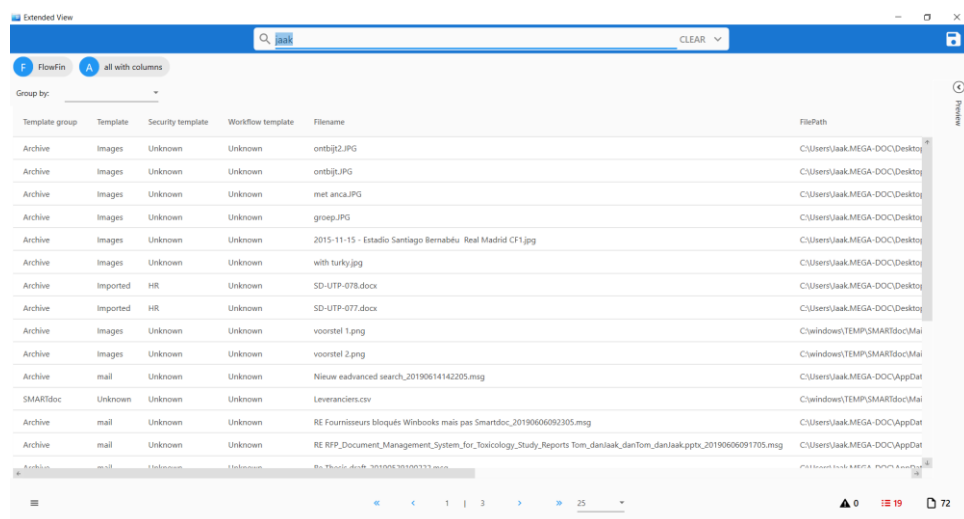
- On the right side of the screen you have the option to search for documents archived during a certain period:



- Another option on the right side of screen are the extensions, you can specify to find only doc, docx documents for example

SMARTdoc User Guide-Extended View-Saved Searches

RESULT OF A SEARCH FOR TEXT



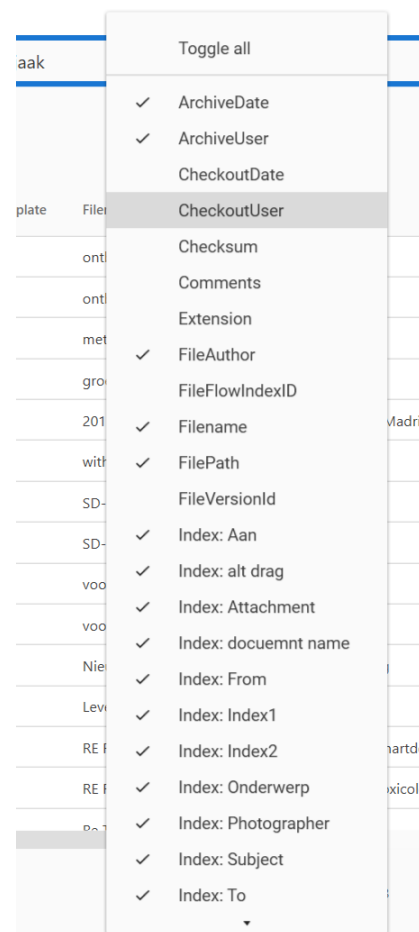
You get a lot of information after a search:

- In the search box, you see the text you were looking for
- You get a list of documents matching your search criterium
- Documents are shown per page, standard you have 25 documents per page; in our example we have 3 pages of 25 documents
- In the right bottom part of the screen, you get:
 - The number of errors
 - The number of workflows you have to approve
 - The total number of documents found

COLUMNS AFTER THE SEARCH

You get a lot of columns in the search result; you can move the columns around and remove or add columns.

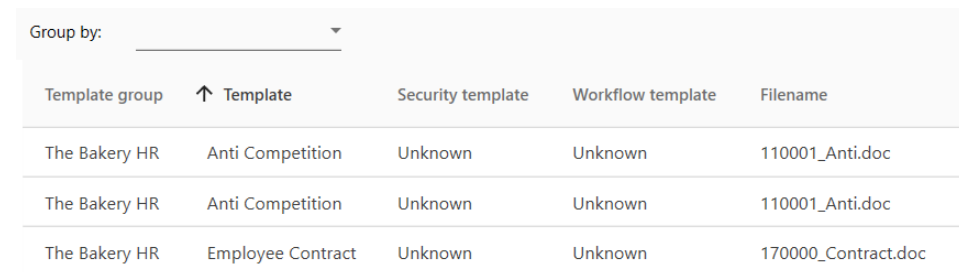
To add or remove columns, right-click on a columns title:



You can now choose the columns of interest to you.

SORT ON COLUMNS

You can sort on any column by just clicking on the name:

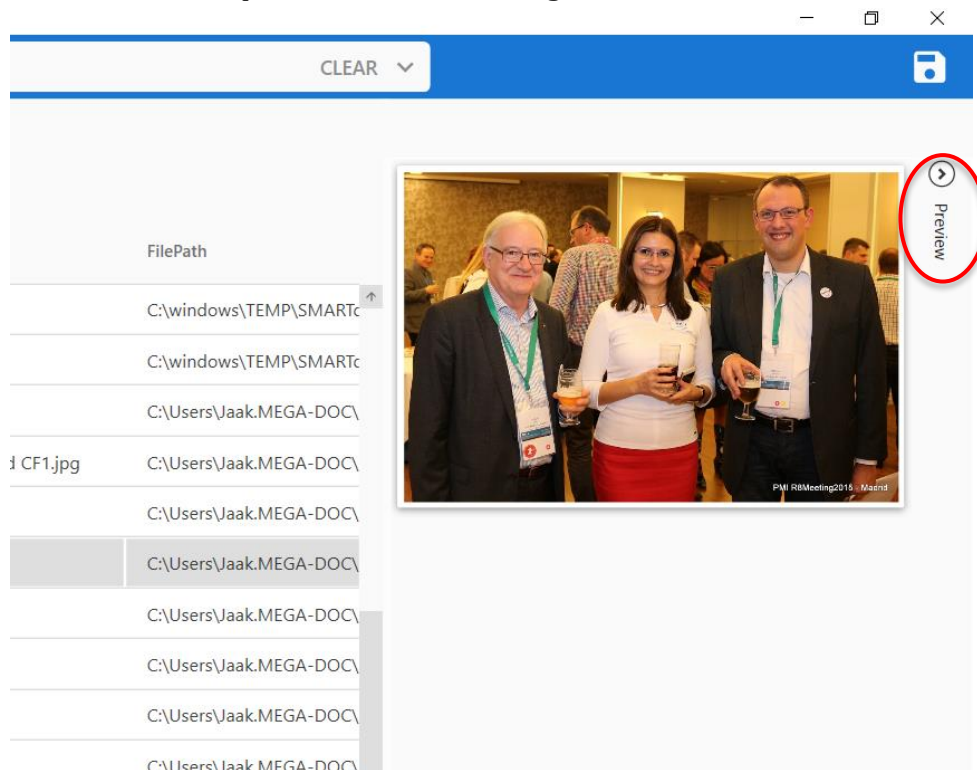


SMARTdoc User Guide-Extended View-Saved Searches

You can sort ascending or descending, you see the order by the direction of the arrow.

PREVIEW

When you have a list of documents, it would be great to see the content of the document. If you want that, you can open the preview in the extended view. You find the preview button on the right side of the search result:



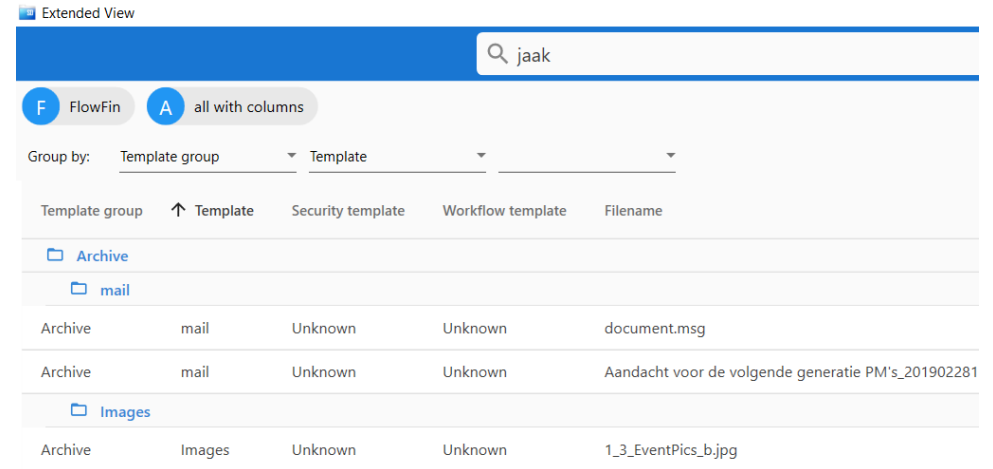
You can enlarge or reduce the preview, when moving through your documents, the preview show the selected document.

You can always close the preview, by clicking the preview arrow on the right side of the screen.

GROUPING THE SEARCH

We are going to group the results by template group and template.

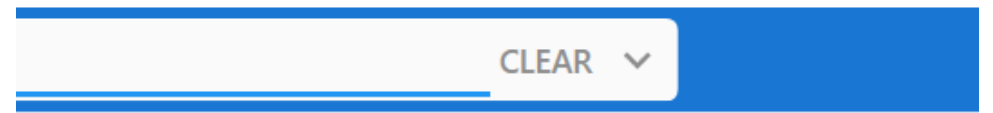
On the top of the search screen you see, 'group by':



You first select 'Template group' and then 'Template'. The result is shown in the picture above.

CLEAR SEARCH

You can always clear the search you performed by clicking the button: clear.



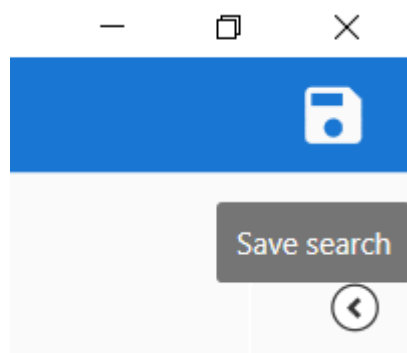
SAVED SEARCHES

SAVE YOUR SEARCH

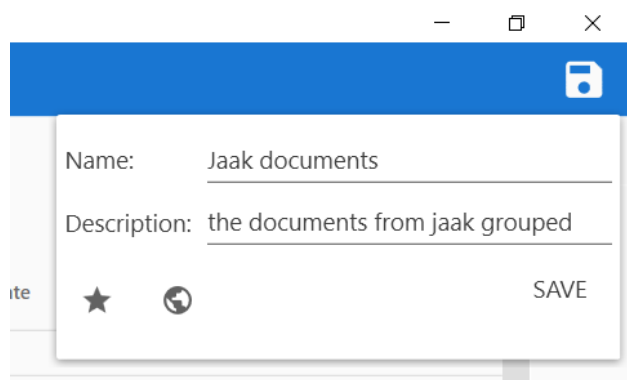
It can be interesting to save the work you just did; the text you searched for, the columns you ordered, the grouping.

SMARTdoc User Guide-Extended View-Saved Searches

To save a search, you click the save icon in the search window:



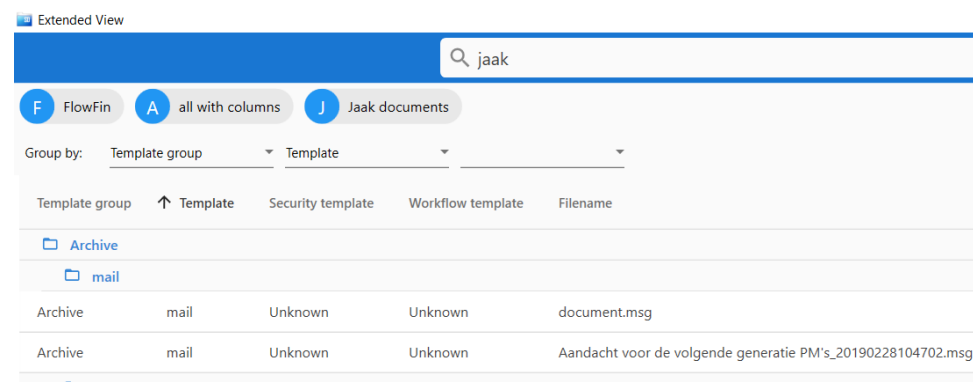
NAME YOUR SEARCH



You get some extra options:

- Name your search
- You can add a description
- When you want to add the search to your personal favorites, click the 'star'
- If you want to make the search available for everyone, click the glow icon
- Click the 'save'

SAVED SEARCHES IN YOUR FAVORITES

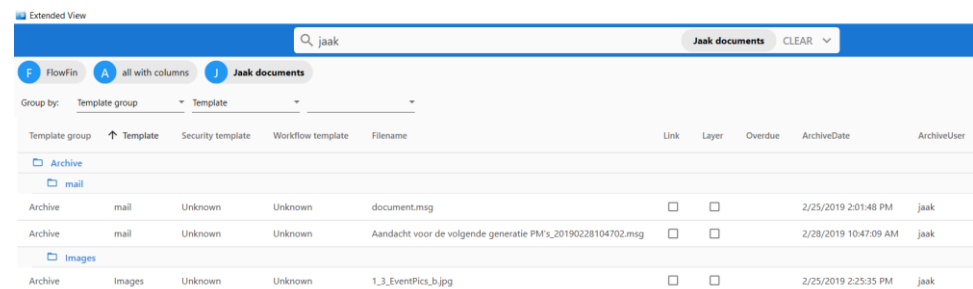


Below the search box you get all the saved searches in your favorites.

To use a saved search, just click the button.

A USED SAVED SEARCH

When we use a saved search, you see the name of the search in the search box and the search button is also highlighted:

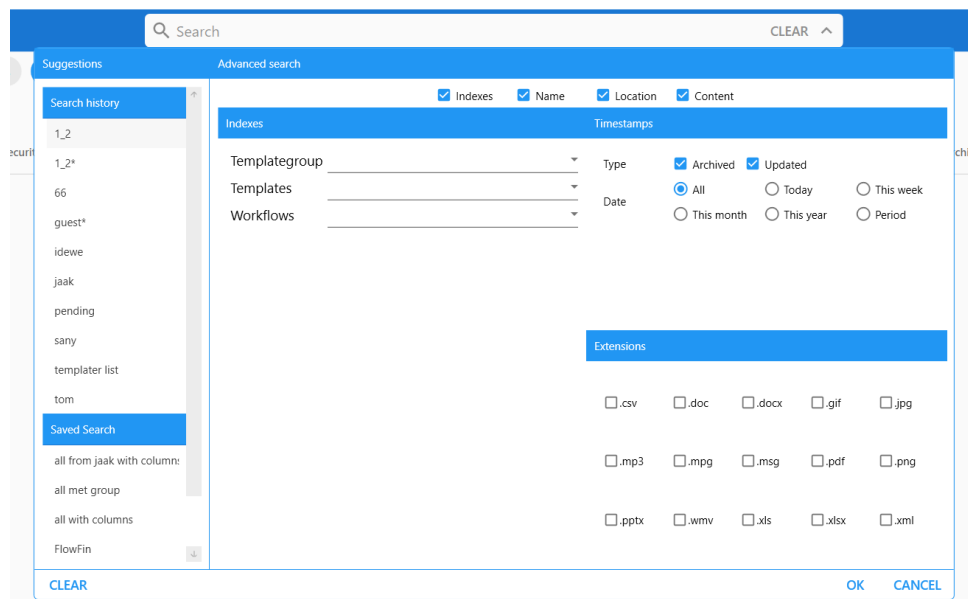


To clear a saved search, click the CLEAR button in the search line.

USE A SAVED SEARCH NOT IN YOUR FAVORITES

When you click the arrow next to CLEAR, you open the filter screen:

SMARTdoc User Guide-Extended View-Saved Searches

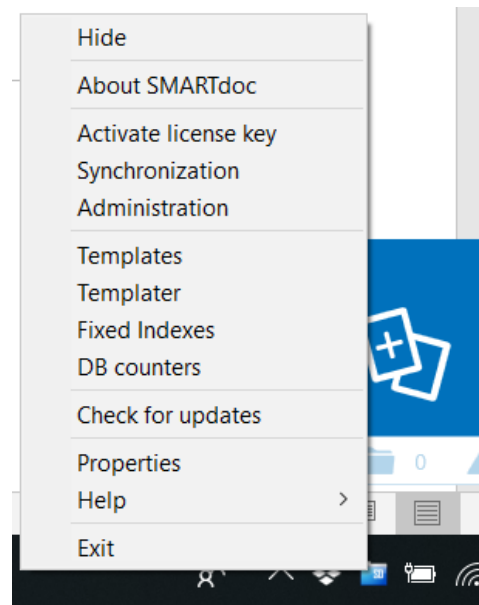


You see the list of your saved searches on the left side.

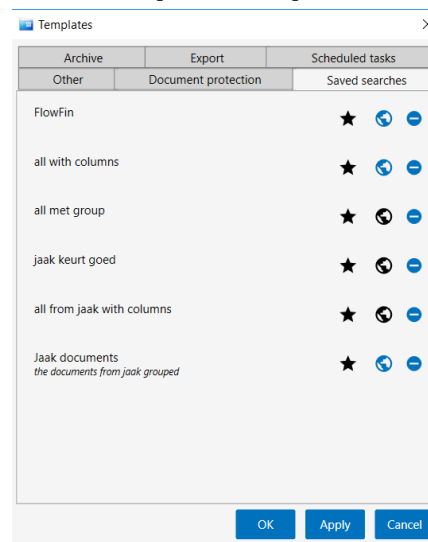
When you start typing the name of a saved search, the list is reduced to show the matching saved searches.

DELETE A SAVED SEARCH

To delete a saved search, go to the templates by right clicking the SMARTdoc icon in the task bar:



Select the option 'Templates' and choose 'Saved Searches'.



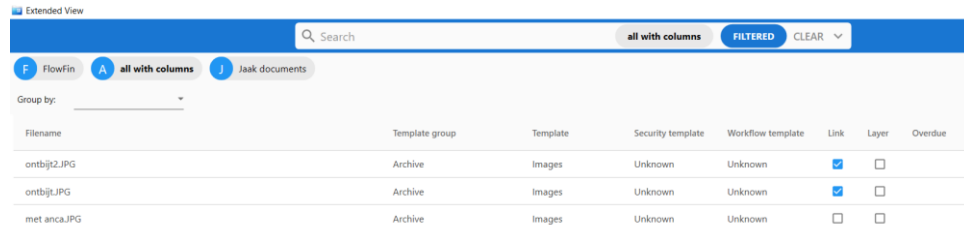
Delete the searches you don't need anymore.

SMARTdoc User Guide-Extended View-Saved Searches

SEARCH IN SEARCH

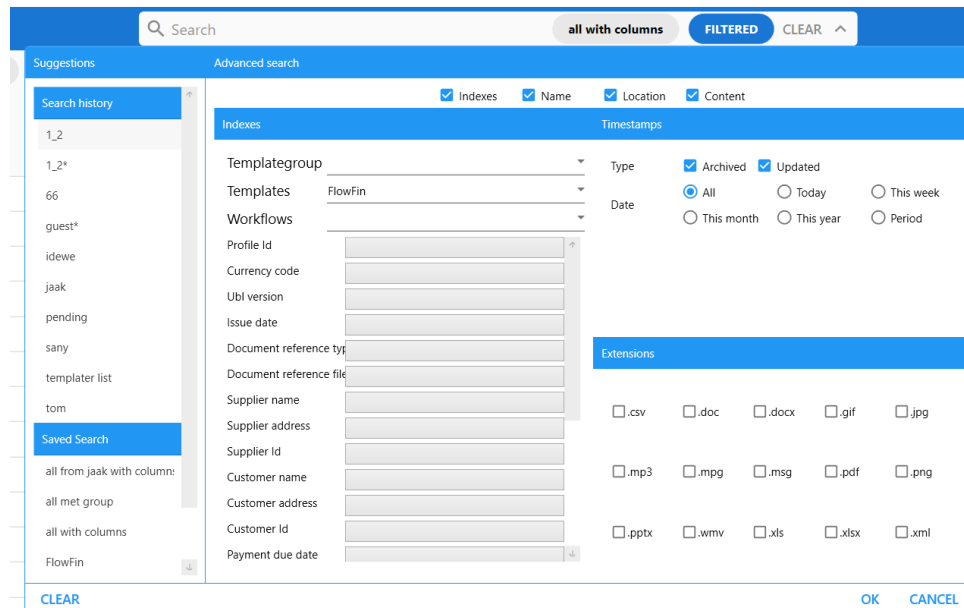
REFINE A SAVED SEARCH OPTION

Select a saved search.



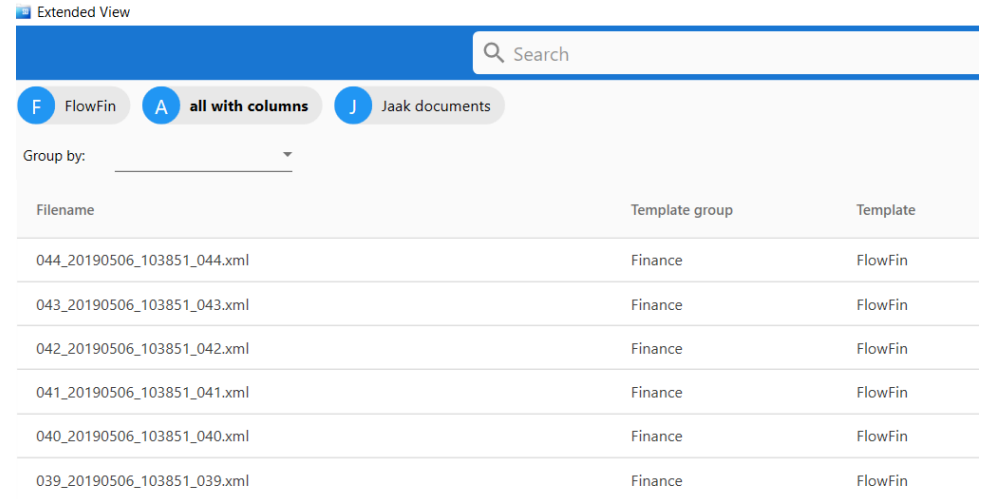
You see the saved search highlighted, the name is shown in the search box and you see the 'Filtered' in blue.

When you click 'Filtered', you can filter on different options:



In our example we filter on a specific template.

When you click 'OK', your saved search options remain, but you have less results.

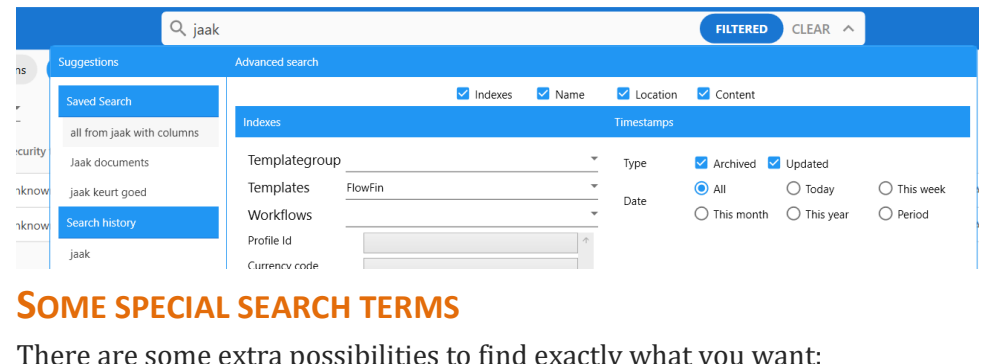


This means that the layout of your saved search is kept in the new result window.

SEARCH IN SEARCH

You perform a search without using a saved search.

You get the result, but can continue to refine your search, you don't have to start it over.



SOME SPECIAL SEARCH TERMS

There are some extra possibilities to find exactly what you want:

- Typing more words adds automatically AND between the words
- You can type more words with OR between them
- You can also use the EXCLUDE

SMARTdoc User Guide-Extended View-Saved Searches

- You can also search for a specific template or template group by just typing the name:

Extended View

Search:

FlowFin **A** all with columns **J** Jaak documents

Template group	Template	Security template	Workflow template	Filename	FilePath
	FlowFin	Unknown	Jaak keurt goed	044_20190506_103851_044.xml	C:\Users\Jaak.MEGA-DOC\Desktop\SMA
	FlowFin	Unknown	Jaak keurt goed	043_20190506_103851_043.xml	C:\Users\Jaak.MEGA-DOC\Desktop\SMA
	FlowFin	Unknown	Jaak keurt goed	042_20190506_103851_042.xml	C:\Users\Jaak.MEGA-DOC\Desktop\SMA