

Laserfiche - Searching for Documents

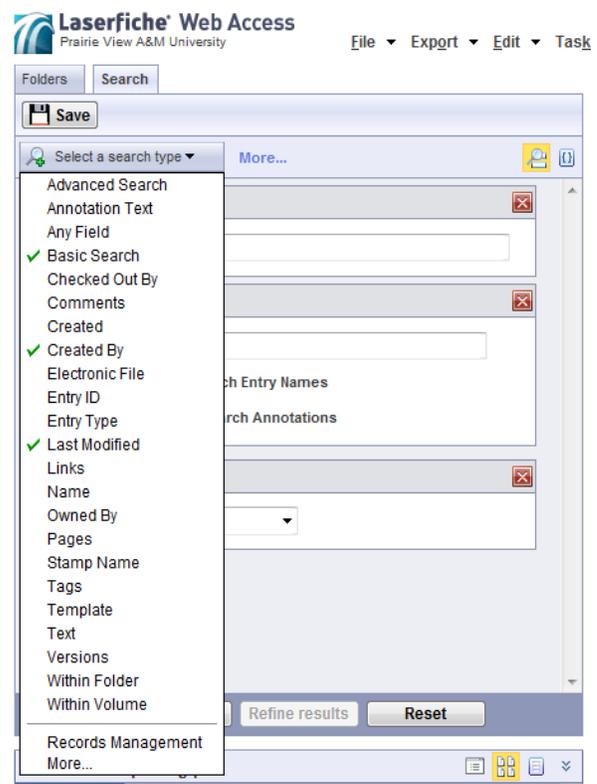
After storing your documents, you can now retrieve them by using various search methods. The best method for searching will depend on how much information you know about the particular document.

When you open up your viewing pane you see that there are columns that have information on the documents within Laserfiche. You have the option to do a search by selecting one of those columns as your criteria. So if you know for example who created the document, you could do a search base on the “Created By” column.

Performing a Basic Search

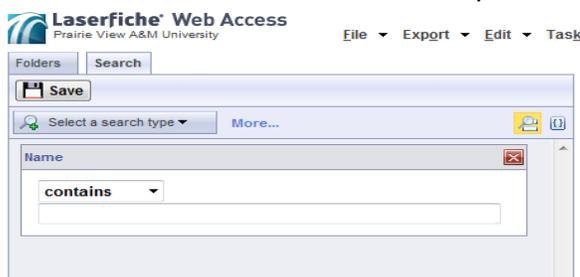
Clicking on the “more...” link beside the “Select a search type”, box will open up the Search Attributes window. “Basic” is your default filter type.

1. On the left-hand side of your screen you will see the Folder/Search pane. Click on the “Search” tab.
2. Click on the “Select a search type” box and a drop down menu will appear. This is where you can select the criteria.
3. Select the criteria and a green check mark will appear beside it and a box will appear where you can further refine your criteria.
4. Click in the space outside of the drop down menu and you will now be able to start entering information into the search criteria you selected.
5. Enter information as it applies to the criteria you selected and then click on the “Search” button. Your results will show up in the viewing pane on the right hand side of your screen.



Tips

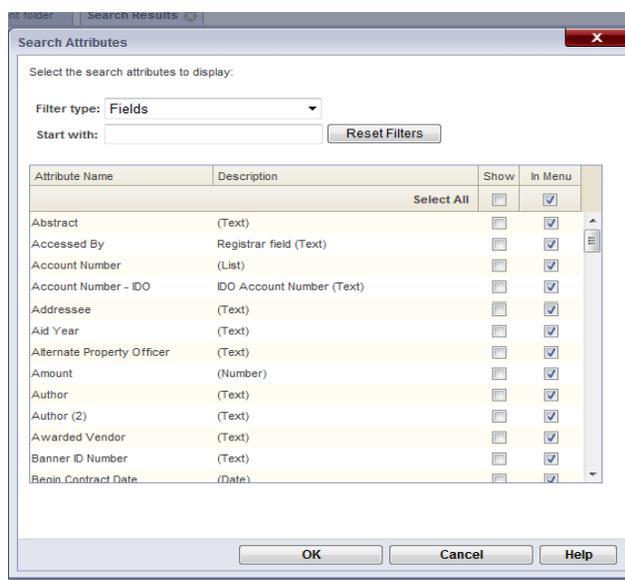
- You can actually save the search method that you just performed by clicking on the “Save” button located above the “Select a search type” box. Just give it a unique name and click on save.
- If you don’t want to use one of the criteria’s that you selected, you can just click on the red X beside that entry and it will be removed.
- A good search method is to choose “Name” as your criteria. This way you can enter the name of a document or person and you will be able to get results. One thing to remember is that with this option you would have to know exactly how the name of the file is structured. Typing John Smith will only yield John Smith but typing John smith will not give you the same results. To get around this issue it’s best to select “contains” in that drop down menu. This will give you all results where that name occurs in the system.



- To ensure that you get results, make sure that all your documents have gone through OCR. OCR is Optical Character Recognition, this process goes through all your documents and recognizes every word on that document and it makes it available for searching.

Performing a Field Search

Clicking on the “more...” link beside the “Select a search type” box will open up the Search Attributes window. You can select the filter type which in this case is the Fields filter type. This filter is applicable if you have templates assigned to your documents. Each template has fields that contain information on the document that it is assigned to. These fields now become searchable if information has been entered into them. Once you select the various field values and click OK, they will now appear in your search options for you to use.



Performing a Records Management Search

This is best suited for individuals designated as Records Managers. Clicking on the “more...” link beside the “Select a search type” box will open up the Search Attributes window. You can select the filter type which in this case is the Records Management filter type.

