

# Laserfiche - Searching for Documents

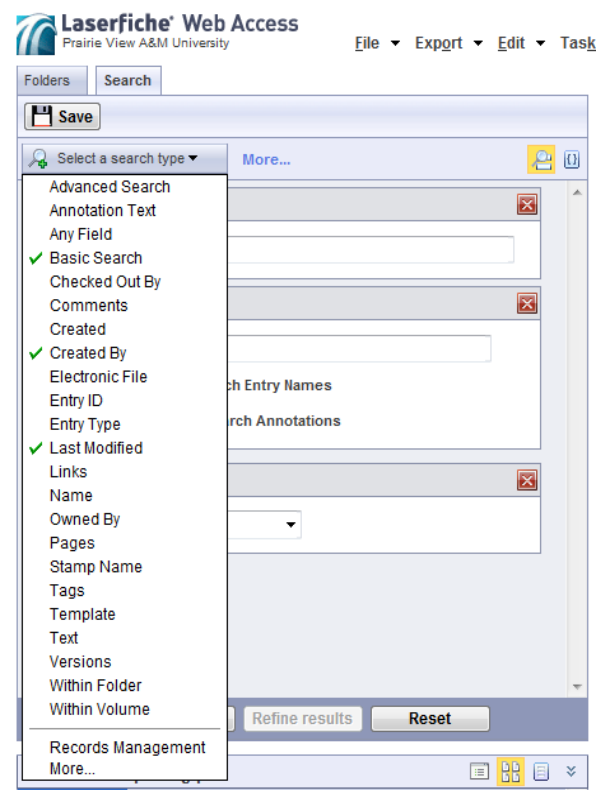
After storing your documents, you can now retrieve them by using various search methods. The best method for searching will depend on how much information you know about the particular document.

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

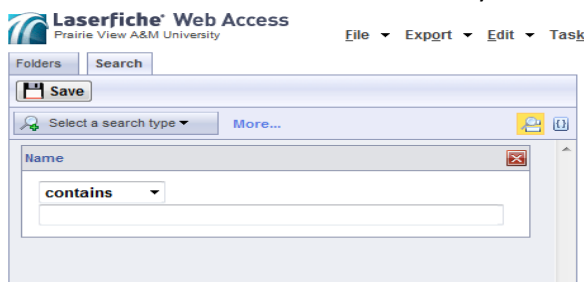
Clicking on the "more..." link beside the "Select a search type", box will open up the Search Attributes window. "Basic" is your default filter type.

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

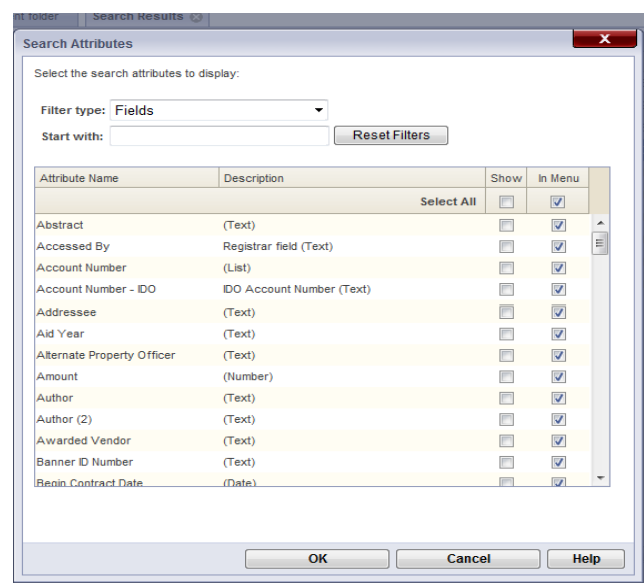
- You can actually save the search method that you just performed by clicking on the “Save” button located above the “Select a search type” box. Just give it a unique name and click on save.
- If you don’t want to use one of the criteria’s that you selected, you can just click on the red X beside that 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.

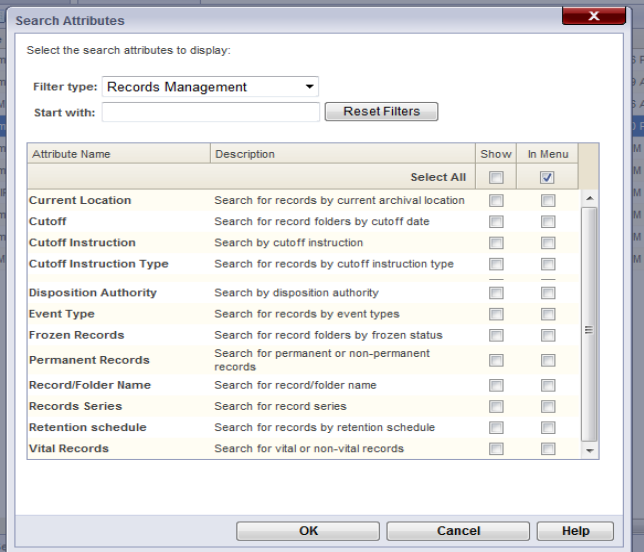
## Performing a Field Search

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.



The screenshot shows a window titled "Search Attributes" with a close button (X) in the top right corner. Inside the window, there is a section "Select the search attributes to display:" containing a "Filter type:" dropdown menu set to "Records Management" and a "Start with:" text box. A "Reset Filters" button is located to the right of the text box. Below this is a table with columns: "Attribute Name", "Description", "Show", and "In Menu". A "Select All" button is positioned above the "Show" and "In Menu" columns. The table lists various search attributes, each with a "Show" checkbox and an "In Menu" checkbox. The "In Menu" checkbox for "Current Location" is checked. At the bottom of the window are "OK", "Cancel", and "Help" buttons.

Attribute Name	Description	Show	In Menu
Select All			
Current Location	Search for records by current archival location	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Cutoff	Search for record folders by cutoff date	<input type="checkbox"/>	<input type="checkbox"/>
Cutoff Instruction	Search by cutoff instruction	<input type="checkbox"/>	<input type="checkbox"/>
Cutoff Instruction Type	Search for records by cutoff instruction type	<input type="checkbox"/>	<input type="checkbox"/>
Disposition Authority	Search by disposition authority	<input type="checkbox"/>	<input type="checkbox"/>
Event Type	Search for records by event types	<input type="checkbox"/>	<input type="checkbox"/>
Frozen Records	Search for record folders by frozen status	<input type="checkbox"/>	<input type="checkbox"/>
Permanent Records	Search for permanent or non-permanent records	<input type="checkbox"/>	<input type="checkbox"/>
Record/Folder Name	Search for record/folder name	<input type="checkbox"/>	<input type="checkbox"/>
Records Series	Search for record series	<input type="checkbox"/>	<input type="checkbox"/>
Retention schedule	Search for records by retention schedule	<input type="checkbox"/>	<input type="checkbox"/>
Vital Records	Search for vital or non-vital records	<input type="checkbox"/>	<input type="checkbox"/>