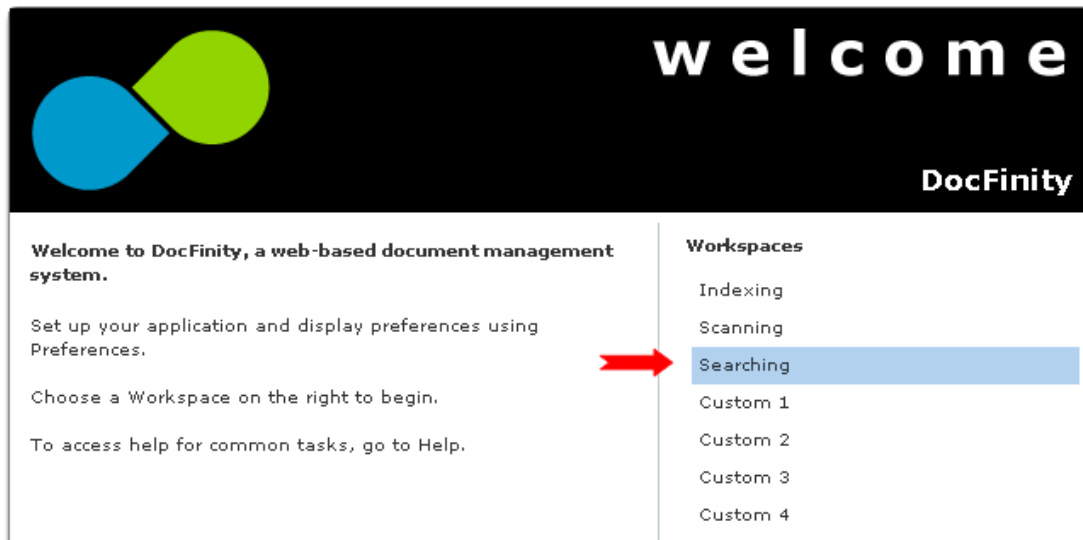


Searching for Images in v10

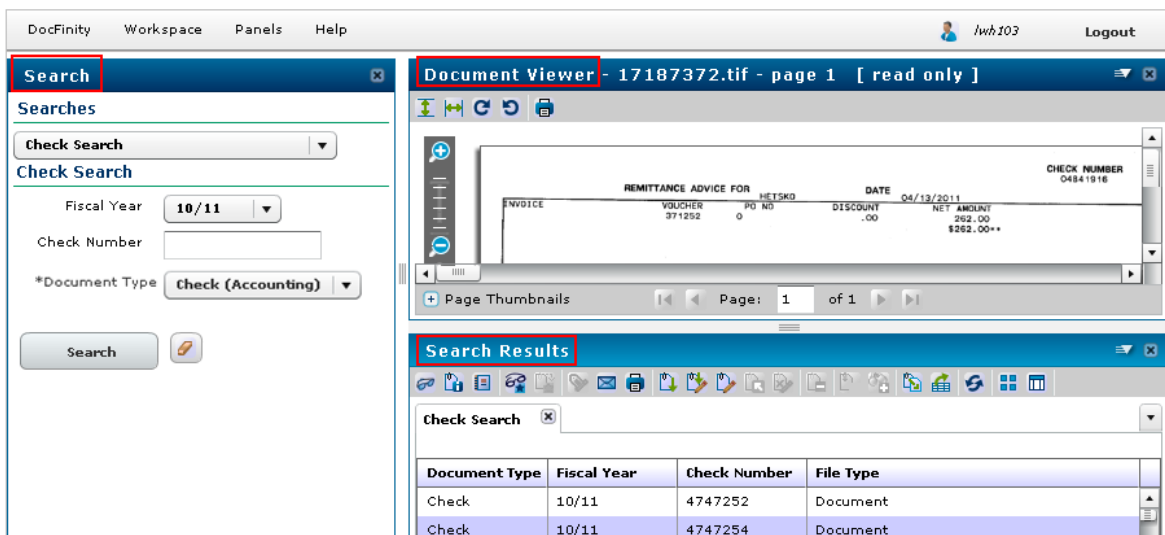
Following are the steps to search for images in Docfinity version 10.

Searching for Images:

- Log into Docfinity on www.controller.psu.edu/docfinity
- Open **Searching Workspace** in Welcome screen.

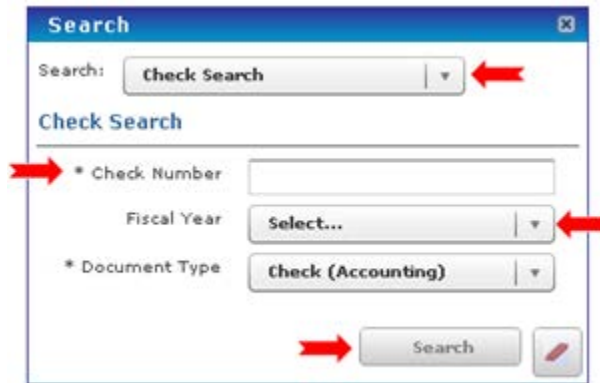


- **Searching Workspace** includes Panels for: Search Panel, Document Viewer and Search Results Panel.



Search Panel: Searches

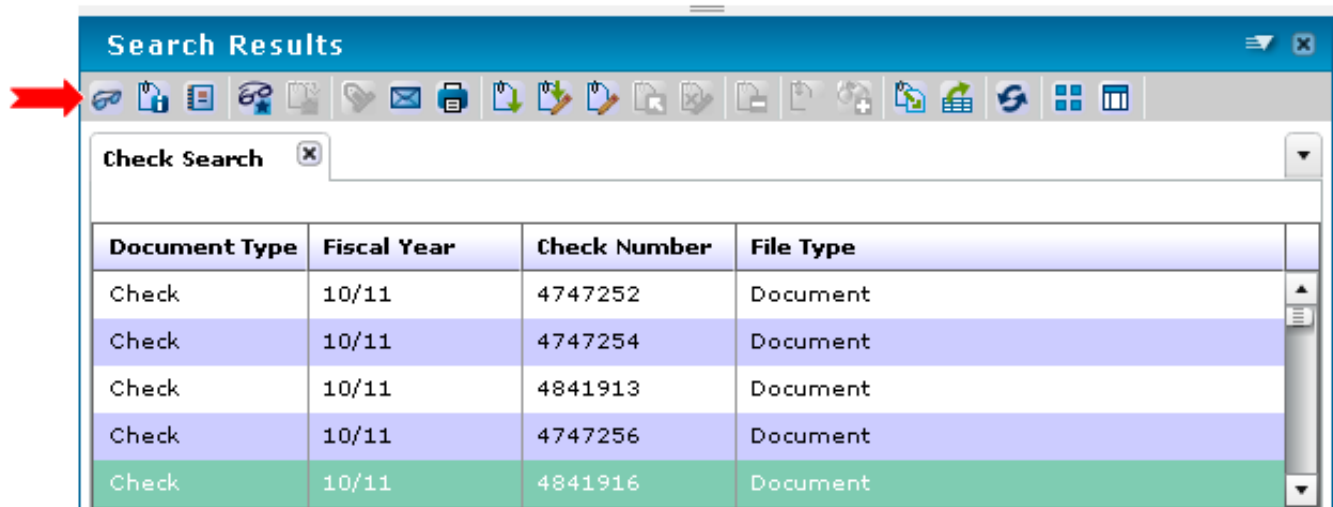
- Search field contains the list of customized searches available.
- Click drop down arrow in search field.
- Select the search for the document type needed.




- Search name and the Metadata fields for each document type will display. An Asterisk * denotes required metadata. Data must be selected or entered in this field for the search to be completed.
- Click **Search**.

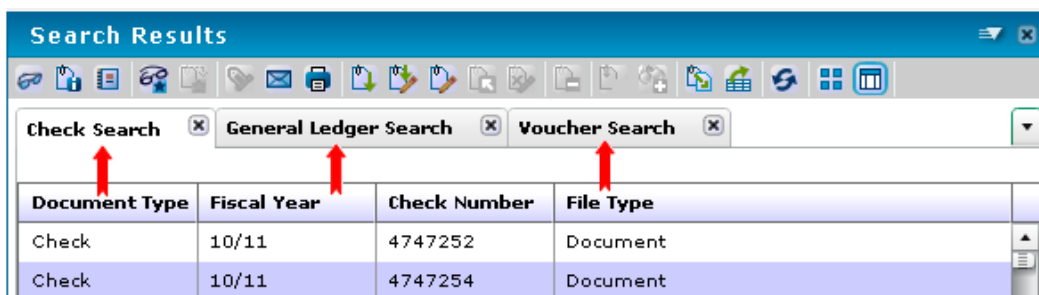
Search Results Panel:

- All documents matching the search criteria will display in the Search Results screen.



- To view a document double click it or click it once and click the View Document icon 
- Document will display in **Document Viewer Panel**. See details on next page.

- Each new search completed will be displayed in a new tab in the Search Results screen making it easy to go back to a prior search with just a click. *See screen shot below.*



- [Click here for additional details on the Search Results](#) Button Bar and drop down menu.
- When Panel is closed all search results are cleared.

Additional Searching Details:



- When opened the Search Panel displays the last search and last prompt values entered.
- Searches are designed and assigned to users by administrators.
- Requests for new searches or access to additional searches are submitted to PSU DocFinity Support.

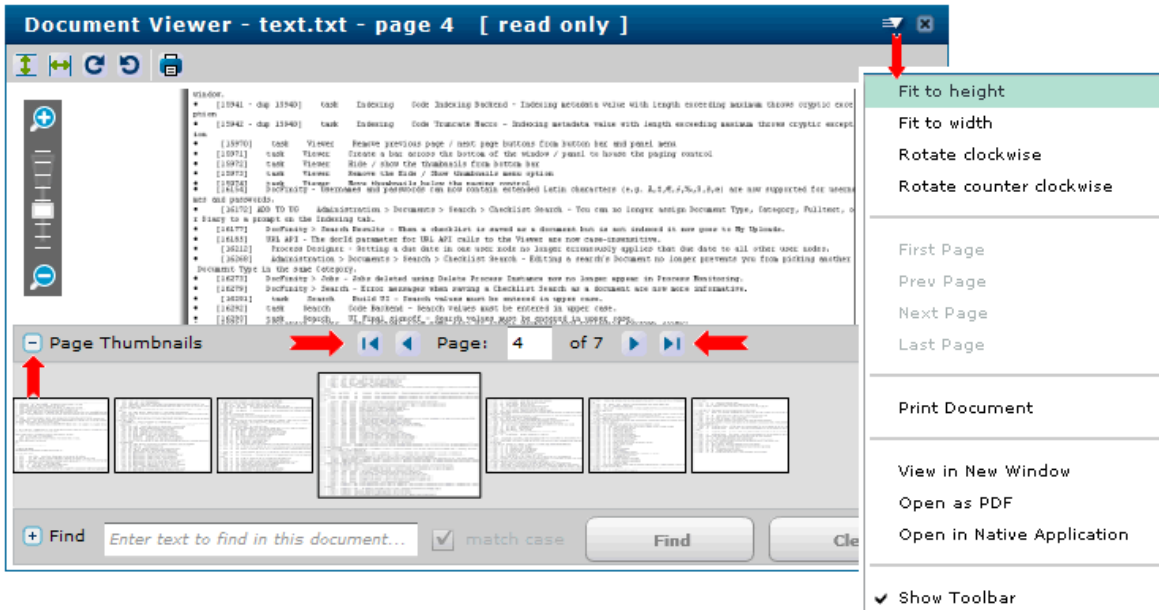
Logging out:

Click the Logout button in the upper right corner of the screen to end your session in DocFinity.











Document Viewer Panel:

- Button Bar and the Drop Down Menu commands allow user to control view.
- Multipage documents are viewed one page at a time. The page control fields allow movement between pages.
- Thumbnail viewing area is opened or closed using the  or  buttons.



- When Document Viewer Panel is closed document display is cleared. Documents viewed in separate tab or as a PDF remain displayed in browser tabs.

Document Viewer Panel - Buttons and Commands:

Panel Menu		Viewer options. Options vary depending on a user's Feature Rights.
Fit to Width		Adjust the image to fill the entire width of the viewer pane.
Fit to Height		Adjust the image to fill the entire height of the viewer pane.
Rotate Counter Clockwise		Rotate the image 90 degrees counter-clockwise.
Rotate Clockwise		Rotate the image 90 degrees clockwise.
Print		Print the document. Printing requires the <i>Print</i> Feature Right and <i>View</i> document security access to the document to be printed. Opens Print.
Zoom In		Magnify the image.
Zoom Out		Shrink the image.
View in New		Open the displayed document in the full Document

Window	Viewer (which allows markups and annotations) in a new browser window. Requires <i>View</i> document security access to the document.
Open as PDF Document	Open the displayed document as a PDF. The workstation must have the ability to open and display PDFs. Requires <i>View</i> document security access to the document to be opened.
Open as Native Document	Open the displayed document in the document's native program. The workstation must have the native program installed. Requires <i>View</i> document security access to the document to be opened. The native application must be available on the local workstation.

Show Toolbar Toggle the display of the image control buttons. Default is "Show".

Zoomer Bar Magnify or shrink the image. Click the bar to magnify to that level.



Magnify the image.



Shrink the image.

Canvas – Displays the image. Right-clicking displays a context-sensitive menu.

Scroll Bar – Scrolls the image. You can also use a mouse scroll-wheel to scroll the image.

Page Thumbnails – Displays up to ten individual pages in a multi-page document at a time, as thumbnails. Click a thumbnail to select that page and display it in the *Document Preview* panel.



Toggle the thumbnail display.

First Page  Go to first page of document.

Previous Page  Go back one page.

Page The current page. Type in page number and hit enter to display that page.

Next Page  Go forward one page.

Last Page  Go to last page of document.

Search Results Panel – Buttons and Commands

The screenshot shows the 'Search Results' window with a toolbar and a table of results. A context menu is open over the table, listing various actions for the selected documents.

Document Type	Fiscal Year	Check Number	File Type
Check	10/11	4747252	Document
Check	10/11	4747254	Document
Check	10/11	4841913	Document
Check	10/11	4747256	Document
Check	10/11	4841916	Document

The context menu includes the following items:

- View Document
- View Document Information
- View Diary
- View Pointers
- Create Pointer
- Re-index
- Email Document(s)
- Print Document(s)...
- Download Document
- Download Document To Edit
- Edit Document in Native Application
- Replace Document
- Cancel Edit
- Delete Document(s)
- Save Search as Document
- Add Sub-search
- Copy All Rows
- Export to Spreadsheet
- Refresh Results
- View Thumbnails
- View Details
- Search Results Preferences
- Show Toolbar

Panel Menu



Search Results options. Some options appear only if the user has the appropriate Feature Rights and the search type supports that function.

View Document



Open the document in Document Viewer, or if the document is a saved Checklist Search, opens the saved checklist in a *Search Results* tab. Not available when multiple documents are selected.

View Document Information



View the selected document's metadata and footnotes, if any. Opens the Document Information panel. Not available when multiple documents are selected.

View Diary...











View the selected document's diary. Opens the Diary panel. Not available when multiple documents are selected.

View Pointers



View all pointers for the selected document. Pointers are copies of a document that may have different metadata than the original. Not available when multiple documents are selected.

Create Pointer		Create a pointer to the document. Opens the <i>Index</i> panel to provide pointer metadata. Requires the <i>Create Pointer</i> and <i>Index</i> Feature Right and <i>Update</i> and <i>View</i> document security access to the document. Not available when multiple documents are selected.
Re-index		Edit the metadata associated with the selected document. Opens the <i>Index</i> panel. Requires the <i>Reindex</i> Feature Right and <i>Update</i> document security access to the document. Not available when multiple documents are selected.
Email Document		Email the selected document as an attachment or email a link to the document. Opens the <i>Email Document</i> window, where you can address an email. Requires the <i>Email as Attachment</i> Feature Right and <i>View</i> document security access to the document. If the document has redactions, <i>override_redactions</i> document security access is also required.
Print Document		Print the selected document(s), using server printing. Opens the <i>Print</i> window, where you can select a printer accessible to your group(s) and set any document options and cover sheets. Printing requires the <i>Print</i> Feature Right and <i>View</i> document security access to the document to be printed (<i>override_redaction</i> required to print a document without its redactions; <i>view_markup</i> to print with its markups).
Fax Document		Fax the selected document(s) using a fax service. Opens the <i>Fax</i> window. Faxing requires the <i>Fax</i> Feature Right and <i>View</i> document security access to the document to be faxed (<i>override_redaction</i> required to fax a document without its redactions; <i>view_markup</i> to fax with its markups).
Download Document		Download a copy of the selected document from the <i>Repository</i> . Opens a system <i>Save File</i> dialog. A confirmation message is displayed at the completion of the download. Requires <i>Edit</i> document security access. Not available when multiple documents are selected or when a form is selected.
Download to Edit		Download and check out the selected document from the <i>Repository</i> for editing. Once a document is checked out, no other user may edit it until it is checked back in using <i>Replace Document</i> or the edit is cancelled using <i>Cancel Edit</i> . Opens a system <i>Save File</i> dialog. A confirmation message is displayed at the completion of the download. Requires <i>Edit</i> document security access. Not available when multiple documents are selected or when a form is selected.
Edit		Opens the document directly in its native application (the native

Document in Native Application

application must be available to the workstation). Requires Edit document security access. Not available when multiple documents are selected.

Replace Document



Replace a document in the Repository. Opens Replace Document. Requires *Edit* document security access. Not available when multiple documents are selected or when a form is selected.

If the Document Type allows versioning (set in *DocFinity Administration > Documents > Document Classification > Document Type*), the original document remains in the Repository as an old version, and the original document's metadata information is retained and attached to the new version.

If the Document Type does not allow versioning, the new document simply replaces the old document. The old document is overwritten and cannot be recovered.

Cancel Edit



Cancel the edit on the selected document and mark it as checked-in, allowing other users to check it out for editing. Requires *Edit* document security access. Not available when multiple documents are selected.

Delete Document



Delete the selected document from the Repository. Requires the *Delete a Document* Feature Right and *Delete* document security access to the document.

Copy All Rows



Copy the search results to the clipboard. Results are formatted in CSV format. Requires the *Copy Results to Clipboard* Feature Right.

Export to Spreadsheet



Export the results of a search to a CSV formatted file. The file is automatically emailed to you. However the results of the search have been sorted is how they will appear in the CSV file, except for Stored Procedure and Checklist Searches, which export in their default sort. The exported CSV file will contain all results found by the search, not just the first 2000 (the maximum amount that can be displayed in the *Search Results* window). Requires the Export to Spreadsheet feature right.

Refresh Results



Search again using the same search settings.

View Thumbnails / Switch to Thumbnail View



Display search results as thumbnail images.

**View Details
/ Switch to
Details View**



	Last Name	ID Number	First Name	paymer
	send to folder te			
D	jim		greco	
	jim		greco	
	jim		greco	
D	me			
	me			

Display search results in columns (default). The columns include Last Name, First Name, Address, and File Type (which indicates if the file is a document or a form). Double-click on a column header to sort the results by that column, ascending or descending.

If the Flags column is enabled (DocFinity > Preferences > Search Results > Show Document Flags Column), the first (unlabelled) column displays a "P" if the document is a pointer, a "D" if the document has diary entries, and a "C" if the document is checked out for editing.

Show Toolbar

Toggle the display of the button bar. Default is "Show".

[Return to Steps for Searching](#)