FIND FOLDERS AND DOCUMENTS

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FIND FOLDERS AND DOCUMENTS

The ‘Find Folders and Documents’ selection allows users to search for folders or documents based on any combination of folder and document search criteria. To access the search screen, the user clicks on <Find Folders, and Documents> from the main menu as seen in **Figure 1**.

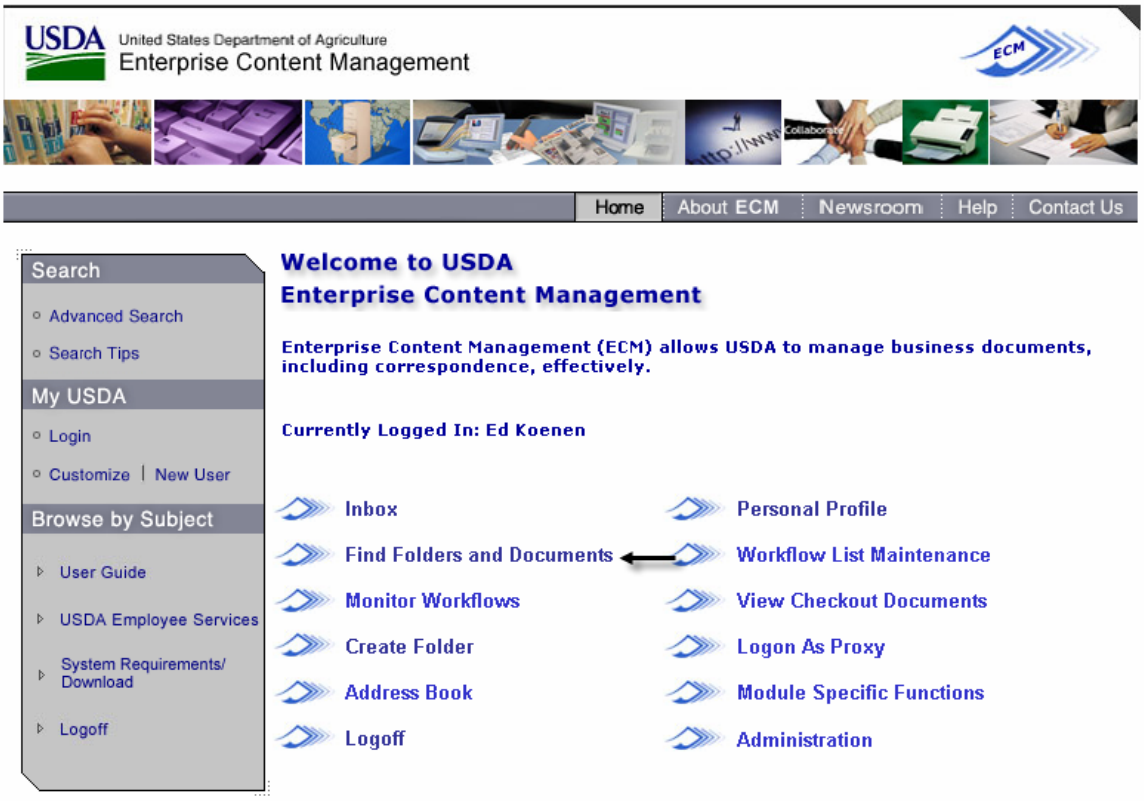


Figure 1: Main Menu – Find Folders and Documents

The ‘Find Folders and Documents’ screen is displayed in **Figure 2**.

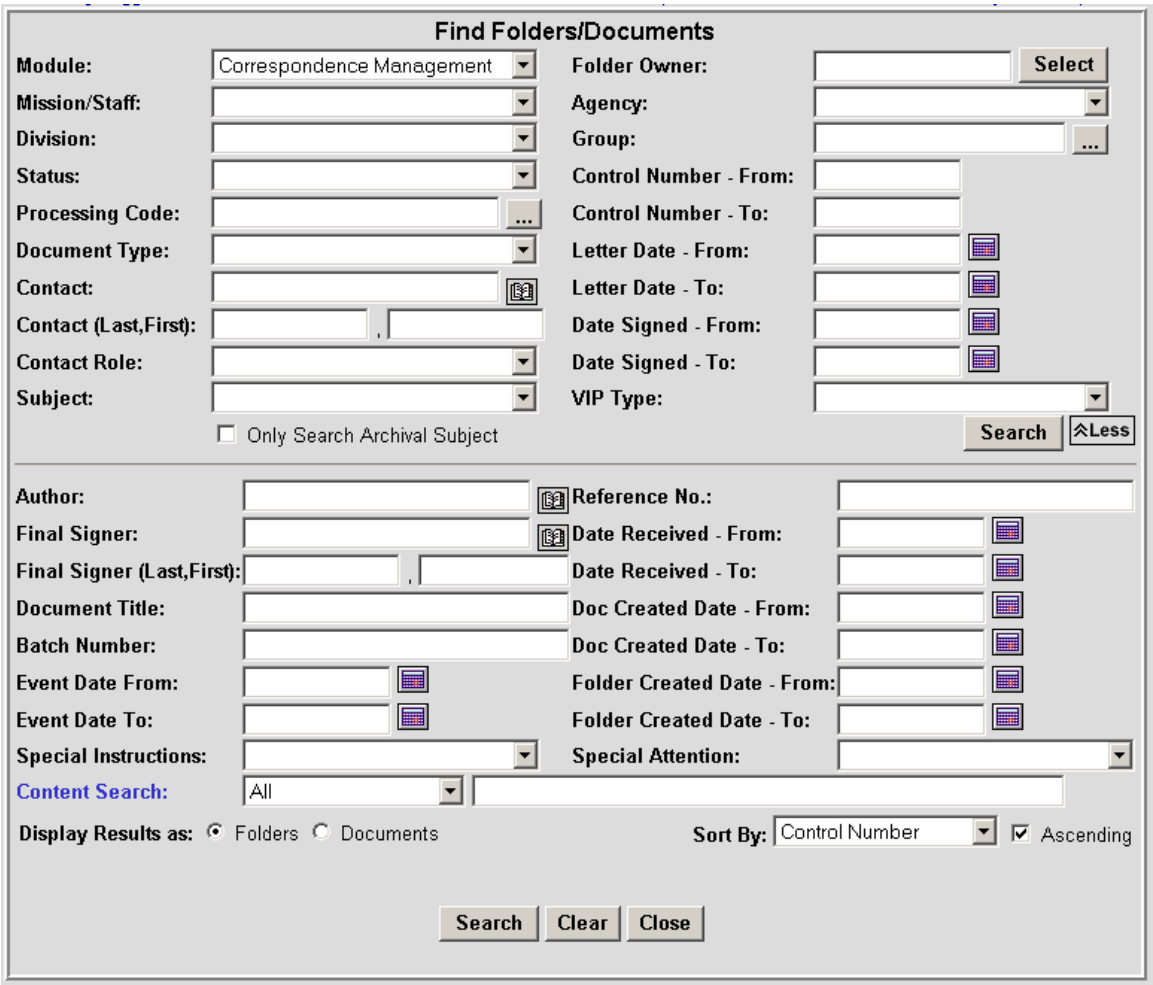


Figure 2: Find Folders and Documents Search Screen

A search may be done by choosing “All Modules” from the Module drop-down box or by choosing a specific module.

The user enters any combination of search criteria and clicks the <Search> button to find all documents or folders that match. Wildcard searches are supported for fields that don’t have drop-down selection boxes. When a field is left blank, the system does not restrict the search based on that field.

Dates are entered manually in MM/DD/YYYY format or by clicking on the Calendar icon to the right of the date field and choosing a date.

Clicking the <Clear> button will remove all search criteria from the screen.

Clicking the <Close> button returns the user to the Main Menu.

The user may elect to display the results as Folders or Documents by clicking the selected radio button near the bottom left hand side of the search screen. The user may also sort the results list by making a selection from the drop-down 'Sort By' box found near the bottom of the right hand side of the search screen. Results will be in ascending (when 'Ascending' box is checked) or descending order (when 'Ascending' box is not checked).

The example in **Figure 3** shows a search for a folder using its control number. When a single control number is entered as a search item, the system will automatically open that folder. After the search criteria is entered, click the <Search> button.

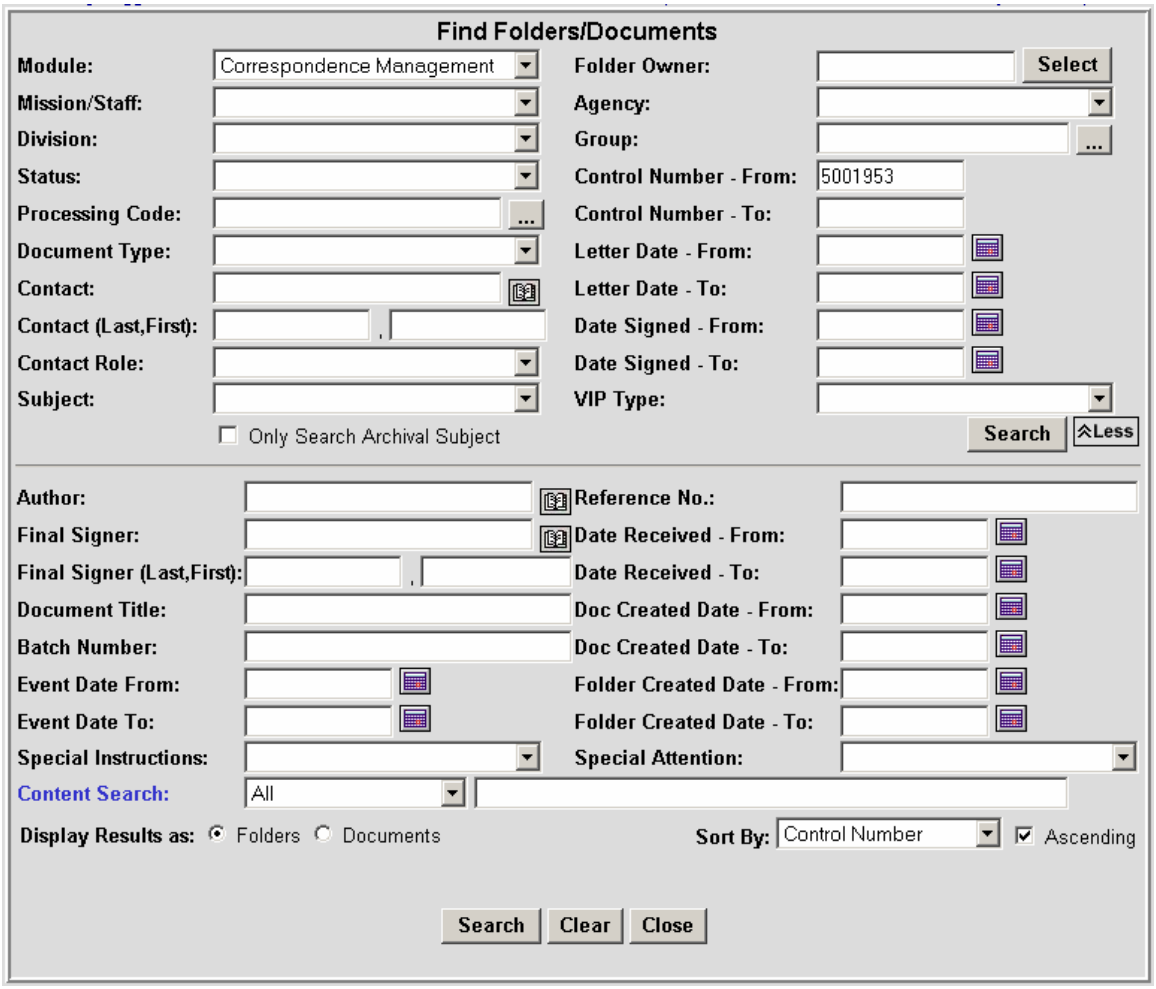


Figure 3: Find Folders/Documents – Control Number Entered

When a single value is entered in a 'From:' field, the system will search for folders or documents that match that value. If the user places an asterisk in the 'To:' field, the system will return all items that are greater than or equal to the value in the 'From:' field.

This search is illustrated in **Figure 4**. The Folder Created Date – From entered is 08/01/2006. An asterisk is placed in the Folder Created Date – To.

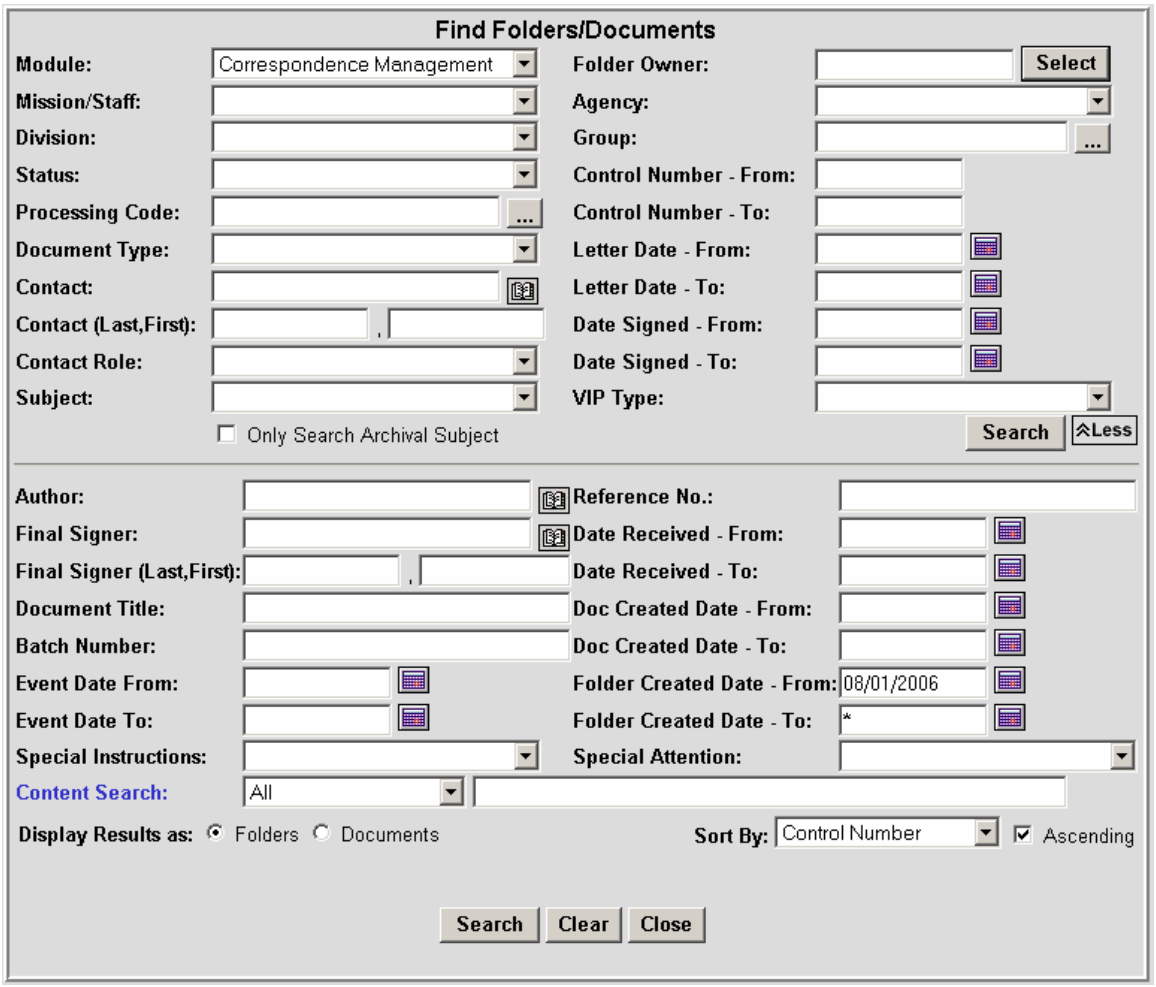


Figure 4: Find Folders/Documents – Folder Created Date

If the user places an asterisk in a 'From:' field and a value in the 'To:' field, the system will search for all items that are less than or equal to the value in the 'To:' field.

The user can also search by content. This allows the user to limit search results by a specific name, word, or phrase or reporting and / or research purposes. The search in **Figure 5** is for the phrase "Civil Rights". All folders and documents containing the words "Civil Rights" will be displayed in the results list.

Figure 5: Find Folders and Documents – Content Search

FOLDER RESULTS LIST

When <Search> is pressed, all folders/documents that meet the search criteria are displayed in the 'Results List' as shown in **Figure 6**.

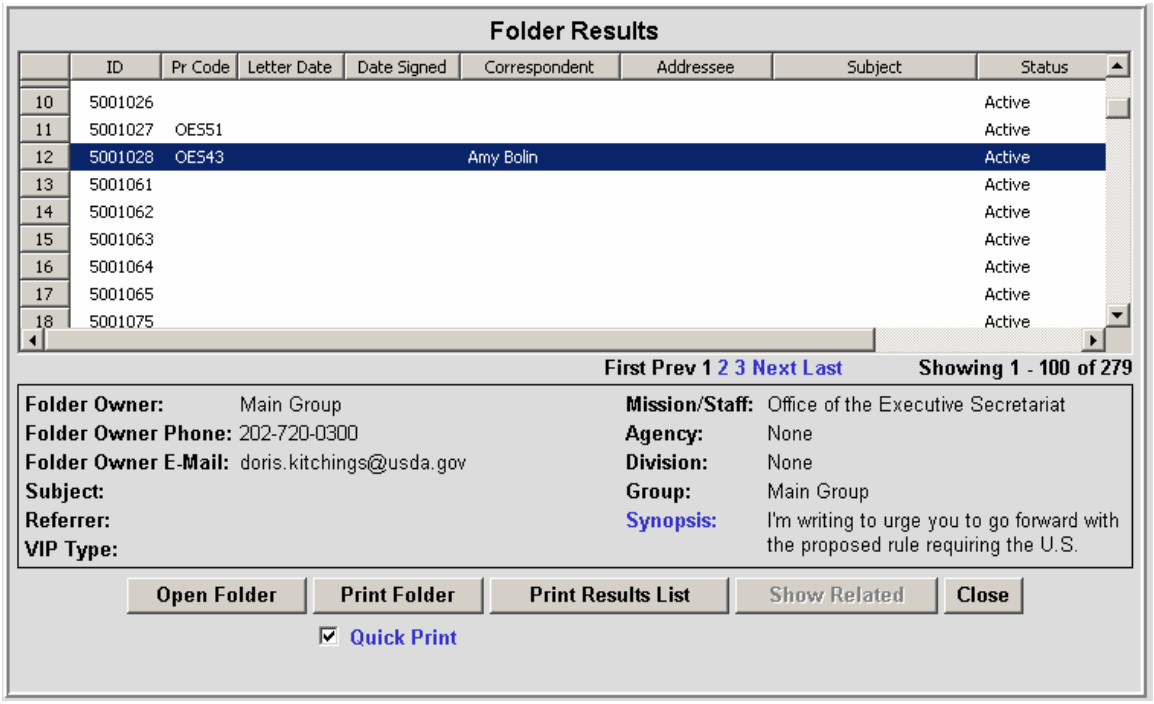


Figure 6: Results List

In the window beneath the folder results, various basic information about the folder is revealed. However, if the user does not have authority to view a folder, the synopsis will not be displayed. A message will be displayed stating 'Authorization Failed' as seen in **Figure 7**.

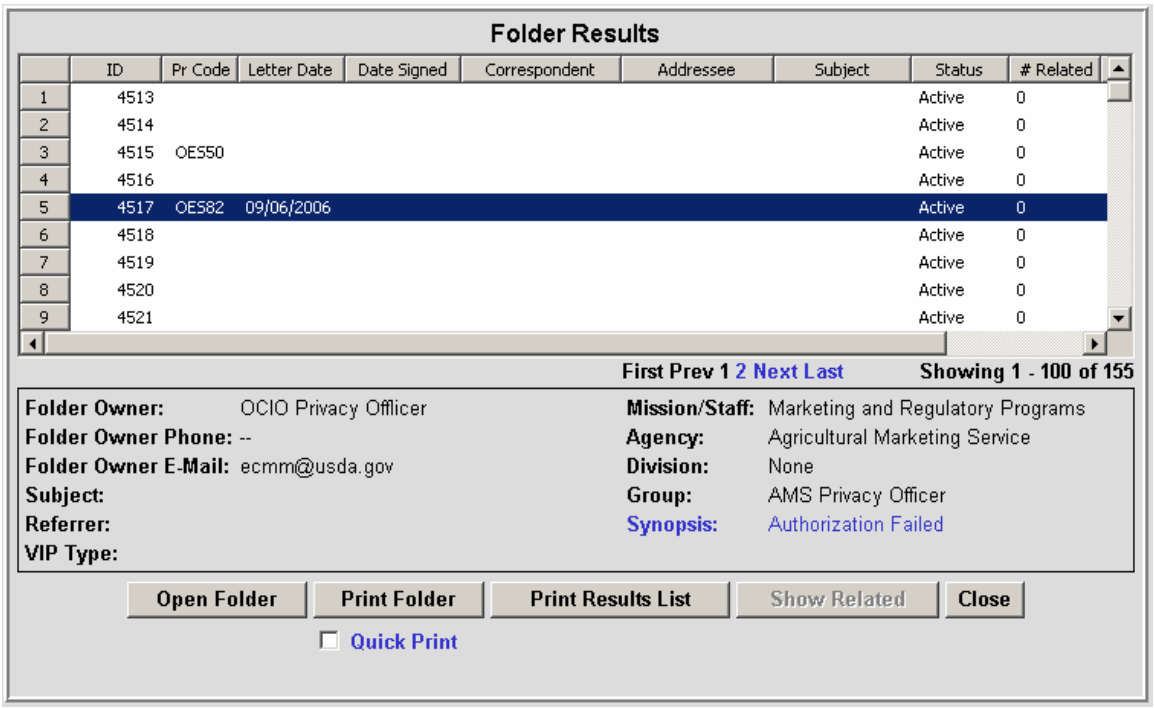


Figure 7: Folder Results – Authorization Failed

If there are no results that meet the search criteria, the screen shown in **Figure 8** is displayed.

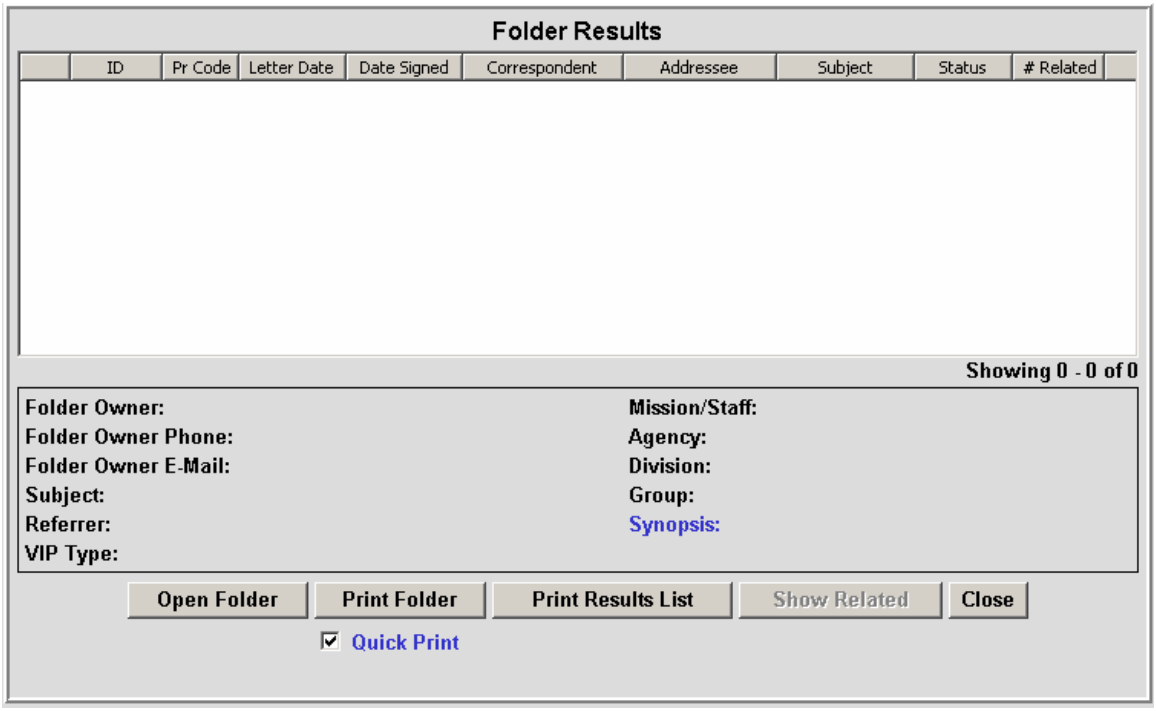


Figure 8: No search Results

OPEN FOLDER

A folder can be opened by double-clicking it or by highlighting it and clicking the <Open Folder> button. When the folder is opened its contents look the same as when the folder is opened in a workflow process.

Depending upon the user's authority and role within the folder, the folder fields and buttons may be enabled.

When an unauthorized user tries to open the folder or a document, the system will display an 'Authorization Failed' message as shown in **Figure 9**.

Figure 9: Folder Access Authorization Failed Screen

The error message contains contact information and the reason the folder could not be opened. If the Folder Owner is a group, the information for the person identified as the group administrator is displayed. If the Folder Owner is a user, the user's contact information is displayed.

PRINT FOLDER

To print multiple items in a folder, the user selects a folder and clicks the <Print Folder> button. If the 'Quick Print' button is checked, folders will be printed based on the selections set in user preferences. If the 'Quick Print' button is not checked, the Print Folder screen is displayed and the user makes the selections.

To print multiple folders (or all folders in the results list), the user holds the control key while clicking each folder to be printed, then clicks the <Print Folder> button. The options that the user selects in user preferences or the print folder screen apply to all folders selected.

If a document is locked for editing, the latest revision of the document is printed.

PRINT RESULTS LIST

The user may print the results list by clicking the <Print Results List> button. A report is generated as shown in **Figure 10**.

Folder Results

09/08/2006

ID	Pr Code	Letter Date	Date Signed	Correspondent	Addressee	Subject	Status	# Related	Final Signer
4300002	OES47	02/01/2006	02/09/2006	Edward Anton. Koenen	Pat Koenen	DAIRY	Archived	0	James Lyons
4300004	OES43	02/10/2006	02/10/2006	Alfred H. Anderson	Catherine Dunn	DAIRY GRADING	Archived	0	Thomas J. Billy
5001510	OES53			+Pete V. Domenici	Ann M. Veneman	*RURAL-URBAN DEV	Suspended	0	
5003578	OES10S	08/26/2005	08/26/2005	Christopher P. Dunn	Dan Glickman	DAIRY POLLUTION	Archived	0	Jerry H. Brent
5003613	OES50	08/19/2004		Pete V. Domenici	Ann M. Veneman	*GRANT	Active	0	
5003642	DOJ50	05/10/2006		Erin Leahy	Ann M. Veneman	LAND	Active	0	
5003746							Active	0	
5003751	RDTest	08/01/2006		Hank Brown	Mike Johanns	MORTGAGE	Active	0	
5003771	RDTest	08/03/2006		Jane Doe	Mike Johanns	*ANIMALS	Active	0	

Figure 10: Results List

SHOW RELATED

The <Show Related> function works in two ways.

- If no folder has been highlighted and <Show Related> is clicked, all related folders will be displayed with an 'R' beneath the folder to which it is connected.

Figure 11 shows Folder 4300014 and 4900081 each have 3 related folders.

Folder Results

	ID	Pr Code	Letter Date	Date Signed	Correspondent	Addressee	Subject	Status	# Related
14	4526							Active	0
15	4527	OES56						Active	0
16	4528							Active	0
17	4529							Suspended	0
18	4300014		08/05/2006		Cathryn B. Kahn	Mike Johanns		Archived	3
19	4900081		07/31/2006		Cathryn B. Kahn	Mike Johanns	ANIMALS 1	Archived	3
20	5003667							Active	0
21	5003668							Active	0
22	5003669							Active	0

First Prev 1 2 Next Last Showing 1 - 100 of 155

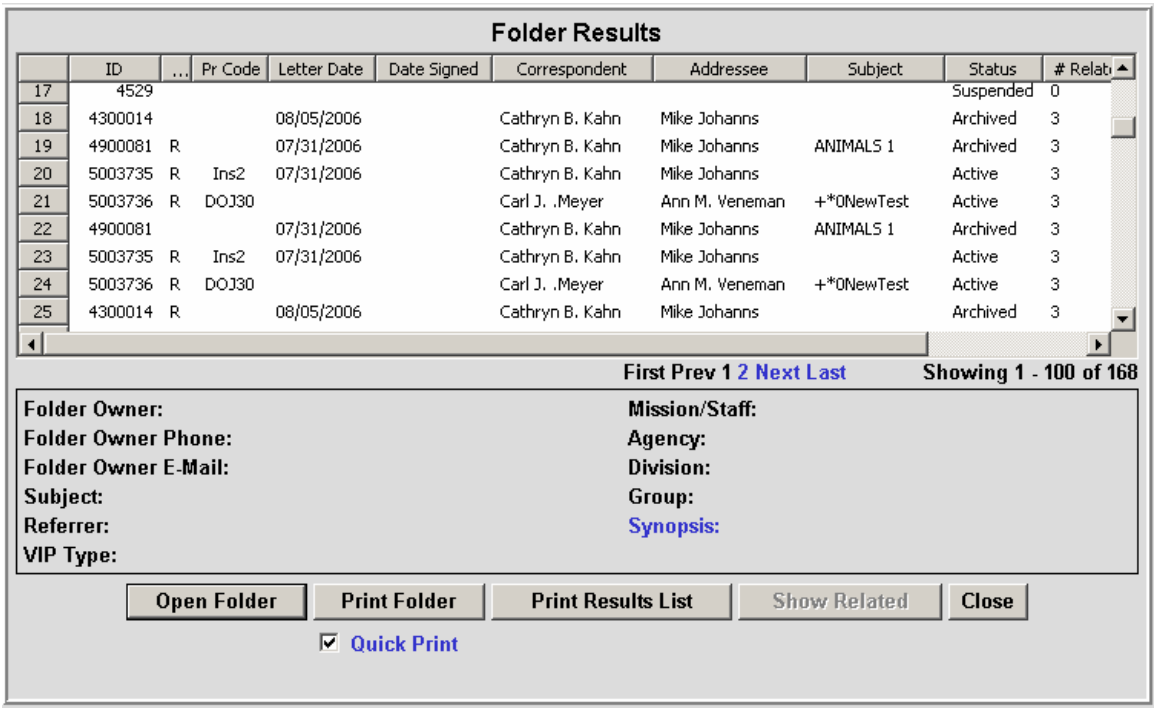
Folder Owner:
Folder Owner Phone:
Folder Owner E-Mail:
Subject:
Referrer:
VIP Type:
Mission/Staff:
Agency:
Division:
Group:
Synopsis:

Open Folder | Print Folder | Print Results List | Show Related | Close

☑ Quick Print

Figure 11:Folder Search Results

When no folder has been highlighted and <Show Results> is clicked, the related folders for all folders are displayed as shown in **Figure 12**.



	ID	...	Pr Code	Letter Date	Date Signed	Correspondent	Addressee	Subject	Status	# Relat
17	4529								Suspended	0
18	4300014			08/05/2006		Cathryn B. Kahn	Mike Johanns		Archived	3
19	4900081	R		07/31/2006		Cathryn B. Kahn	Mike Johanns	ANIMALS 1	Archived	3
20	5003735	R	Ins2	07/31/2006		Cathryn B. Kahn	Mike Johanns		Active	3
21	5003736	R	DOJ30			Carl J. .Meyer	Ann M. Veneman	+*0NewTest	Active	3
22	4900081			07/31/2006		Cathryn B. Kahn	Mike Johanns	ANIMALS 1	Archived	3
23	5003735	R	Ins2	07/31/2006		Cathryn B. Kahn	Mike Johanns		Active	3
24	5003736	R	DOJ30			Carl J. .Meyer	Ann M. Veneman	+*0NewTest	Active	3
25	4300014	R		08/05/2006		Cathryn B. Kahn	Mike Johanns		Archived	3

Figure 12: Folders Search Results – Related Folders With No Folder Selected

- If a folder has been highlighted and <Show Related> is clicked. Only the related folders for the highlighted folder will be displayed.

In the results list shown in **Figure 13**, Control number 500 has 3 related folders and has been highlighted.

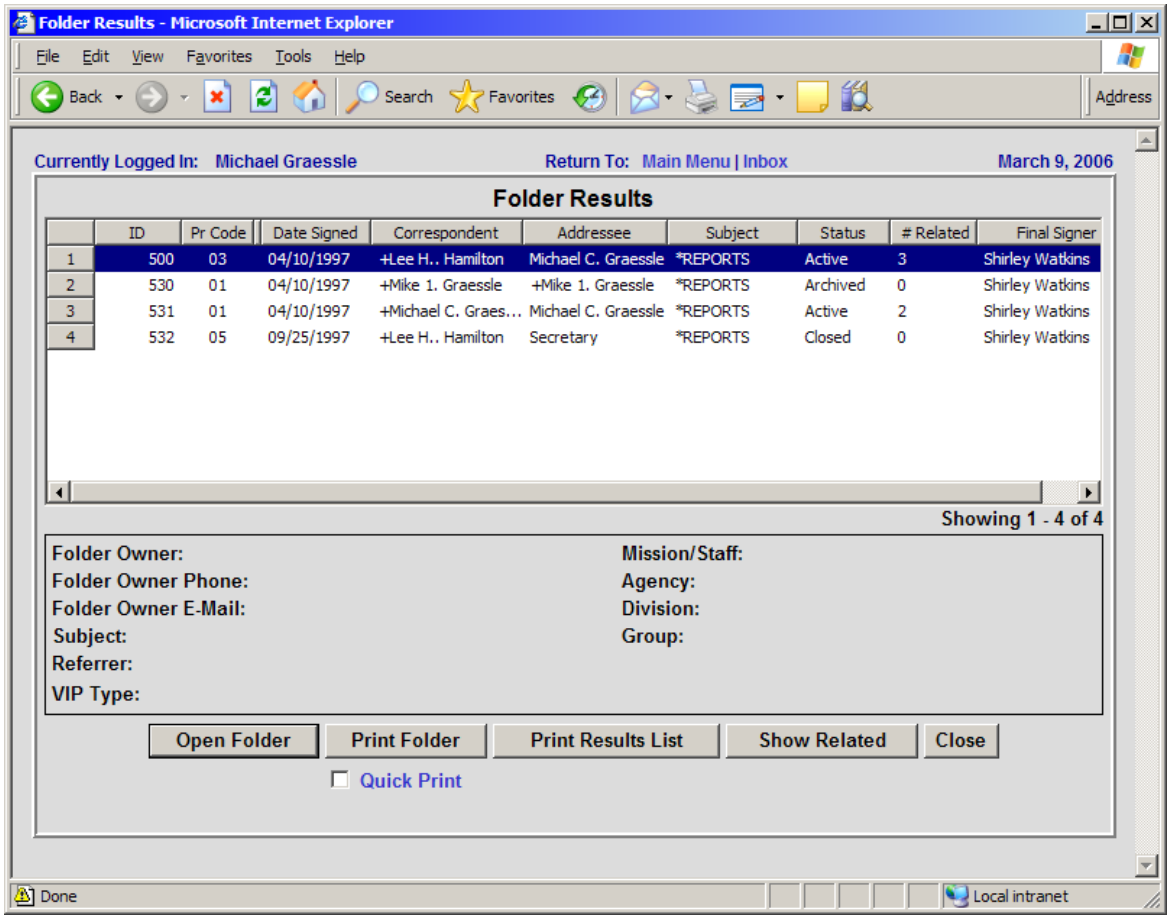


Figure 13: Folders Search Results - 1 Folder Selected

When <Show Related> is clicked, the related folders for folder 500 are displayed with an 'R' as seen in **Figure 14.**

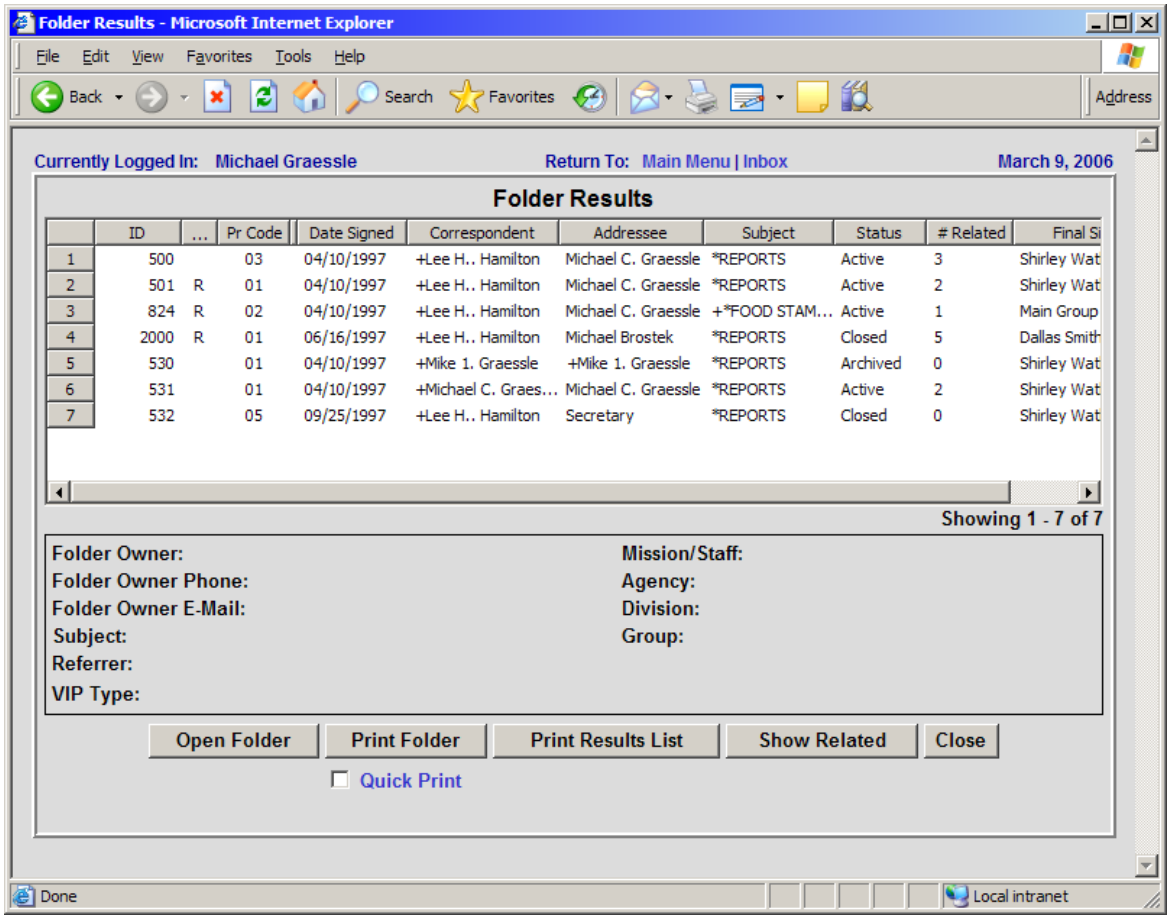


Figure 14: Folder Search Results – Related Folders for 1 Folder

CLOSE

When the user clicks <Close> from the 'Folder Results' screen, the 'Find Folders/Documents' screen is redisplayed. It will have retained the search criteria. The user can type over the search criteria or click the <Clear> button to clear the screen and initiate another search.

Clicking <Close> from the 'Find Folders/Documents' screen returns the user to the Main Menu.