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**Side Menu (left):**  
**Select Application, Drawer, Folder, Document**

### Application Name

-  Drawer Name
  -  Folder Name(1)
    - Top
    - Previous
    -  Document Name 1
    -  Document Name 2
    -  Document Name 3
    -  Document Name 4
    -  Document Name 5
    -  Document Name 6
    -  Document Name 7
    -  Document Name 8
    -  Document Name 9
    -  Document Name 10
    - Next
    - Bottom

**SMARTi** provides and improves upon the familiar model of filing that has traditionally been used for physical storage of paper-based information. **SMARTi** allows drill-down access to **Documents** organized in a hierarchical filing structure, which includes any number of file cabinets (**Applications**) with descending levels for **Drawers, Folders** and **Documents**. These levels are actually the first three index fields in the **SMARTi** database.

An **Application** must be selected before doing any Query or Search. You can drill-down into an **Application** to the **Document** level to display a page result. If more than 10 items are contained in a **Folder, Drawer** or **Document** level, only the first 10 will be displayed for the selected level. You can click on the Top or Previous links on the top of list items and Next or Bottom links on the bottom of list items to display a different starting point in the list. Clicking again on an open level will close that level. Any Query or Search is performed only within the selected level (**Application, Drawer, Folder** or **Document**).

## Simple Query:

Report Type	▼	LIKE	▼		Query
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**Simple Query** allows you to use text (string), numeric or date fields in the **SMARTi** database to find specific documents.

You can select one index field, one operand, and then enter one criteria value to find documents in the **SMARTi** database within a selected hierarchical level (from the side menu). The results are displayed in a hit list, which may be limited by your assigned level of **Query Security**.

Each document index in the **SMARTi** database is assigned a field type. Each level of the hierarchy in the electronic filing cabinet, and the page level indexes are assigned a field type. All indexes will fall into one of the following four categories:

- **String:** A String field usually contains letters and words. But certain alphanumeric and numeric fields can also be set up as strings. Account numbers, Invoice Numbers, Sales Rep. Numbers, Social Security Numbers and Vehicle Identification Numbers are all fields that should be established as a string.
- **Numeric:** A Numeric field is usually a dollar or total field. Setting up an amount field as a numeric allows you to search for dollar amounts that are greater, less than or equal to a specific amount.
- **Date:** A Date field is usually applied to the Filing Cabinet Drawer, Folder, Document, and certain page level indexes. For many Applications, the Document level of the filing cabinet is most likely equal to the date of the form or report. There is an advantage to setting up a field to be a Date field. If SMARTi recognizes the field as a date, it automatically converts the date into a standard format. For example, if each invoice or report displays the date in a different way, i.e. 09/17/98, 980917, 091798, 1998-09-17 or September 17, 1998, SMARTi will automatically convert these dates to whichever standard format has been selected

for the report and application. This also allows for accurate sorting of the search results.




- **Time:** Like the date format, **SMARTi** can convert run times into standard formats.

## Operands


- **LIKE:** Finds documents that exactly match the criteria value entered. This is the default operand.
- **NOT LIKE:** Finds documents other than the criteria value entered.
- **BEGINS WITH:** Finds documents that start with the criteria value entered.
- **ENDS WITH:** Finds documents that end with the criteria value entered.
- **CONTAINS:** Finds documents that contain at least the criteria value entered somewhere in the field.
- **BETWEEN:** Specifies the start and end value for a range. Syntax: value and value.
- **=** Finds documents that exactly match of the criteria value entered.
- **>** Finds documents greater than the criteria value entered.
- **<** Finds documents less than the criteria value entered.
- **>=** Finds documents greater than or equal to the criteria value entered.
- **<=** Finds documents less than or equal to the criteria value entered.
- **<>** Finds documents not equal to the criteria value entered.
- **IS:** Finds documents that exactly match the criteria value entered.
- **IS NOT:** Finds documents other than the criteria value entered.

**today:** Special criteria value for finding documents by day ranges. Syntax: Date > today or Date > **today**-n. Examples: **today** will find all documents with today's date. **today**-1 will find documents from today and yesterday. **today**-10 will find documents from the last 10 days. **today**-31 will find documents from the last month. **today**-365 will find documents from the last year, etc.

## SMART Query:

(	Index	Operator	Values	)	Boolean	Action
	Name	CONTAINS	smith		OR	<a href="#">Edit</a>
	Name	CONTAINS	john			*
<input type="button" value="Submit"/> <input type="button" value="Add"/> <input type="button" value="Delete"/> <input type="button" value="Query"/> <input type="button" value="Save Query"/>						
	<a href="#">smith and john</a>					
	<a href="#">Cards</a>					
	<a href="#">smith and jones</a>					

Allows you to find documents in the SMARTi database within a selected hierarchical level (from the side menu) using multiple query statements and Boolean logic (and, or). Parentheses may also be used to define complex SQL statements. The statement operands are the same as for Simple Query shown above. The results are displayed in a hit list, which may be limited by your assigned level of Query Security. SMART Queries can be saved by clicking SAVE and giving the query a unique name. The query can be reused at any time by clicking on the saved query links displayed below the buttons. A

saved query may be recalled and edited before submission. Click on the  icon in front of the saved query link to delete the query. A saved query is accessible only by the user who created it.

## Order By:

Order By:   Max Records:


Sets the sort order of the hit list by the field selected. Select ascending or descending to reverse the order.

## Max Records:

Sets the maximum number of hit list items per hit list page. Default is 10 items per page to limit the need to scroll down. Click on another page number or **Next** to view more hit list items. Max Records also affects the side menu.

## Full Text Search:

Search performs full text searches on document content, annotation notes, specified database fields, or all of the above. The content search engine automatically indexes every word on every page of every text document, all notes and all database indexes. The full text search tool bar only appears when a logon user's query security level is selected from the side menu.

**Note:** New information is indexed at up to 5,000 pages per hour. You can determine whether or not a page has been indexed by navigating the side menu to the document level. If there is a  icon in the page column of the hit list, then that page has not yet been indexed for content. A full page OCR Server option is available to index images into the content search engine. If images have not been OCR'd, they can only be found using database queries or by navigating the side menu.

## Default Search Behavior

When entering terms separated by spaces, the documents returned will match all the terms in the query. The more terms entered, the more precise the results will be. Note that all searches are case insensitive.

Search will match exact terms and stemmed variations of the terms. For example for the term *walk*, search will match the terms *walk*, *walking*, and *walked*.

## Examples

- Query: festival Vancouver summer
  - Returns documents containing the terms *festival* and *Vancouver*, and *summer* in varying case.

- Query: taxing
  - Returns documents containing the terms *taxing*, *tax*, and *taxes* in varying case.

## Exact Phrase Matching

Surround the term or phrase in quotes to find documents matching an exact term or phrase. Using quotes also prevents stemming of search terms. or add plus(+) between them. Note that all searches are case insensitive.

### Examples

- Query: "registered savings plan" (registered+savings+plan);
  - Returns documents containing the phrase *registered savings plan* in varying case.
- Query: "taxing"
  - Returns documents containing the terms *taxing* in varying case.

## Wildcards

A wildcard is a character used to substitute a range of possible characters. For best results, apply quotes around the terms to avoid stemmed variations in the search results. The following wildcards are valid:

- ? - Matches one character.
- \* - Matches zero, one, or more characters.

### Examples

- Query: "p?rt"
  - Possible matches are *port*, *part*, etc. in varying case.
- Query: "dep\*t"
  - Possible matches include *depot*, *deport*, *dept*, *depart*, *department*, etc. in varying case.

## Boolean Search

Boolean search allows the use of logical expressions to find documents. The following Boolean operators are available:

- AND (+)** - Returns documents containing both operands.
- OR ( )** - Returns documents containing at least one of the operands.
- NOT (-)** - Returns documents where the operand is not found. This operator applies only to the right operand.

### Examples

- Query: maple **AND** hockey (maple +hockey)
  - Returns documents containing *maple* and *hockey*
- Query: federal **OR** provincial (federal provincial)
  - Returns documents containing *federal*, *provincial*, or both.

- Query: salary **NOT** pension (salary -pension)
  - Returns documents that contain *salary* but do not contain *pension*.

## **My Cart:**

A temporal session space stores selected pages from query or search result set. **My Cart** is only shown on the common menu when **My Cart** is not empty.

### **Open**

- Converts selected pages or all pages (if no page selected) into a single PDF file and opens in a new window.

### **Clear**

- Removes all pages from **My Cart**.

### **Checkout XLS**

- Converts result set of **My Cart** to an Excel spreadsheet and opens in a new window.

### **Checkout PDF**

- Converts result set of **My Cart** to PDF format and opens in a new window.

### **Export XLS**



- Exports original COLD data into an Excel spreadsheet and opens in a new window.

### **Export PDF**

- Export original COLD data into a PDF file and opens in a new window.

## Open:

Find Open Add

Page	Date	Name	Account #	Entry Date
<input type="checkbox"/>	 	<a href="#">1996-06-14 Southwest Harbor Library</a>	<a href="#">81600767</a>	
<input type="checkbox"/>	 	<a href="#">1996-06-14 William A Johnston, or</a>	<a href="#">81600759</a>	
<input type="checkbox"/>	 	<a href="#">1996-06-14 James Rossphal, or</a>	<a href="#">81600627</a>	
<input type="checkbox"/>	 	<a href="#">1996-06-14 Myra G Stanley</a>	<a href="#">81600554</a>	
<input type="checkbox"/>	 	<a href="#">1996-06-14 Everett C Gray, or</a>	<a href="#">81600546</a>	
<input type="checkbox"/>	 	<a href="#">1996-06-14 Southwest Harbor Neighborhood</a>	<a href="#">81600503</a>	
<input type="checkbox"/>	 	<a href="#">1996-06-14 The Mainstay Corporation</a>	<a href="#">81600414</a>	
<input type="checkbox"/>	 	<a href="#">1996-06-14 William R Lector, or</a>	<a href="#">81600384</a>	
<input type="checkbox"/>	 	<a href="#">1996-06-14 Diane C Jones</a>	<a href="#">81600376</a>	
<input type="checkbox"/>	 	<a href="#">1996-06-14 Southwest Harbor Vill Imp Soci</a>	<a href="#">81600368</a>	

Open Add

All Query or Search results are displayed in a hit list. Open temporarily converts the documents or pages in a hit list set into PDF file format and opens them for viewing, emailing and printing. Clicking on the icon or any indexed field will open a single document or page as a PDF file. Select specific documents or pages by ticking the check boxes in front of the page column and then clicking on the Open button to open the selected items as a single PDF file. Clicking on the Open button without selecting any documents or pages will open all current hit list items (up to Max Records) as a single PDF file.

Multiple PDF Viewer windows can be opened at the same time.

- Click Open to view documents or pages in the same window.
- Click Open with the Shift Key to view documents or pages in a new browser window.
- Click Open with the Control Key to view documents or pages in a new browser tab.



## Find:

Find a string in content within the query result from current page up to 10 pages (10 \* Max Page records, case sensitive). This is a slow action only being used for new pages that are not indexed for content. Using Full Text Search is much faster than Find if pages are indexed for content.

## Add:

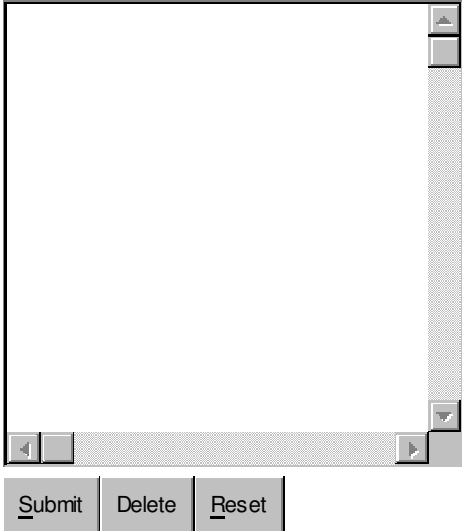
In the page result set of query or search, click on "Add" button to add selected pages or all current pages (if no pages selected) into **My Cart**.



## Note:

Click on the icon  to add a new note or  to modify a existing note for a page. A popup window will show:

### Page Notes

Note:



Author, date and time are logged automatically.  icon changes to  icon after the note is submitted and the screen is refreshed

## Change Password:

Select from common menu->Change Password. A popup window will show:

User Name: Username

Password:

Confirm:

## Logout:

Select common menu->Logout to exit SMARTi Web and return to the login page

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## SMARTi Administration Help

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Administration functions are only available to users with Administration security privileges. Please refer to the SMARTi Administrators Manual available at <http://www.filemark.com/products.htm>