



Office of History

Document Management System

Using Code ZH Document Management System

The ZH Document Management System (*ZH DMS*) uses a set of integrated tools to satisfy the requirements for managing its archive of electronic documents.

Adobe Acrobat Capture provides the necessary tools to convert paper documents into electronic documents. Manuals, letters, forms and other documents are converted to *Portable Document Format (PDF)*. *Acrobat Exchange* allows the user to view and edit electronic PDF documents. *Acrobat Reviewer* allows the user to find and correct words that Acrobat Capture may have recognized incorrectly.

The *Web Page* interface provides authorized users with the ability to retrieve, view and print documents.

Microsoft Access provides the ability to create tables and generate reports.

This reference guide addresses the functions for the following applications.

- Acrobat Capture
- Acrobat Exchange
- Acrobat Reviewer
- ZH Document Management System (ZH DMS)
- Web Page Document Retrieval
- Access

Acrobat Capture

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- Scanning and Processing a document in a single step
- Scanning and Processing a document in two separate steps
- Scanning and Processing a document with more than 100 pages

Acrobat Exchange

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- Using Thumbnails
 - Create a thumbnail
 - Browse a document using thumbnails
 - Move a page using thumbnails
- Edit a document
 - Insert a page
 - Extract a page
 - Replace a page
 - Delete a page
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Acrobat Reviewer

- Getting Started
- Correcting an ACD document
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ZH Document Management System (ZH DMS)

- Getting Started
- Check-in a document
- Find a DMS document
- Find a document using the terms dialog
- View a document in Draft or Layout
- Check-out a document for editing
- Check-out a copy of a document
- Show Checked-out documents
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Web Page Document Retrieval

- Logging on to ZH DMS Web Page
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- Retrieve and view a document

Access

- Getting Started
- Update local data
- View data
- Run a report

Appendix

Acrobat Capture

Acrobat Capture converts paper documents into electronic documents.

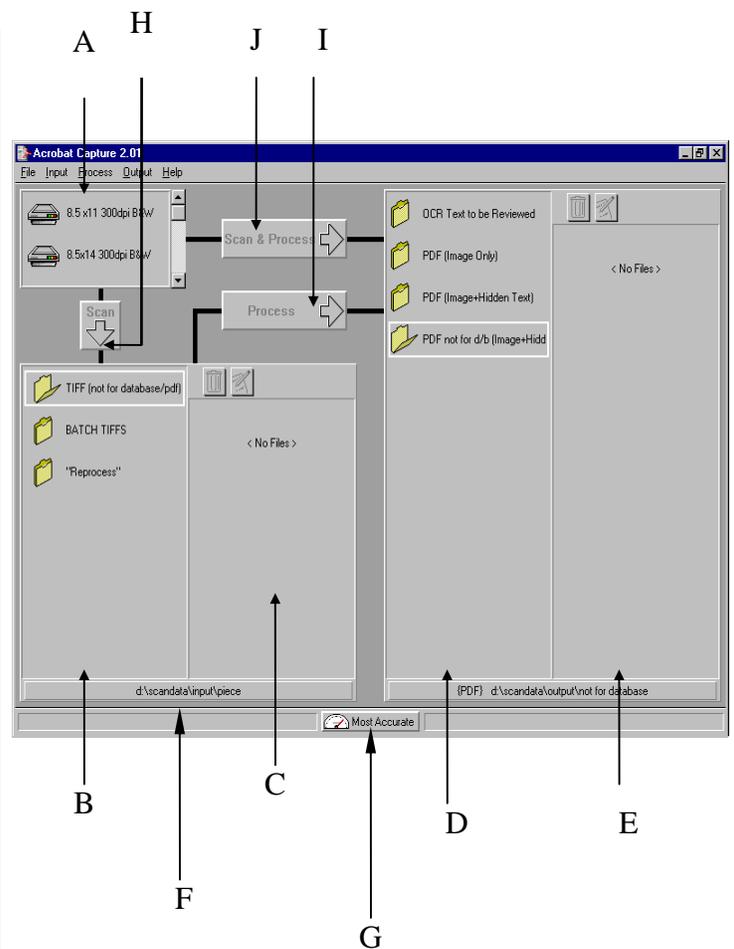
Starting Acrobat Capture

1. Click 'Start'
2. Click 'Programs'
3. Click 'Adobe Acrobat'
4. Click 'Acrobat Capture'



Acrobat Capture Window

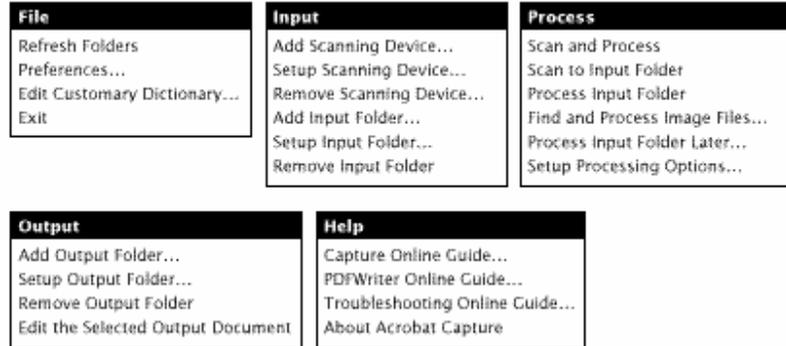
- A. Scanner Area** shows icons for scanners.
- B. Input folder area** shows icons for Input folders. Click a folder icon to select the folder. The selected folder is outlined, the files in the selected folder are shown in the contents area to the right.
- C. Input folder contents area** show icons for the files in the selected *Input folder's* directory.
- D. Output folder area** shows icons for Output folders. Click the desired folder icon to select the folder destination of converted pages. Selected folder is outlined, icons for output files are shown in area to the right.
- E. Output folder contents area** shows icons for the output files in the *Output folder*.
- F. Prompt text box** displays a help message for the button or icon under the cursor.
- G. Performance indicator** shows the selected performance preference setting.
- H. Scan** displays the scan images to the input folder dialog box, used to name the file(s).
- I. Process** tells Acrobat capture to process the selected input folders.
- J. Scan & Process** display both dialog boxes to scan and process in one step.



Acrobat Capture Menu

The Acrobat Capture menu contains the following options: File, Input, Process, Output, and Help. Below is a detailed view of each option.

Acrobat Capture menus



Input and Output Folders

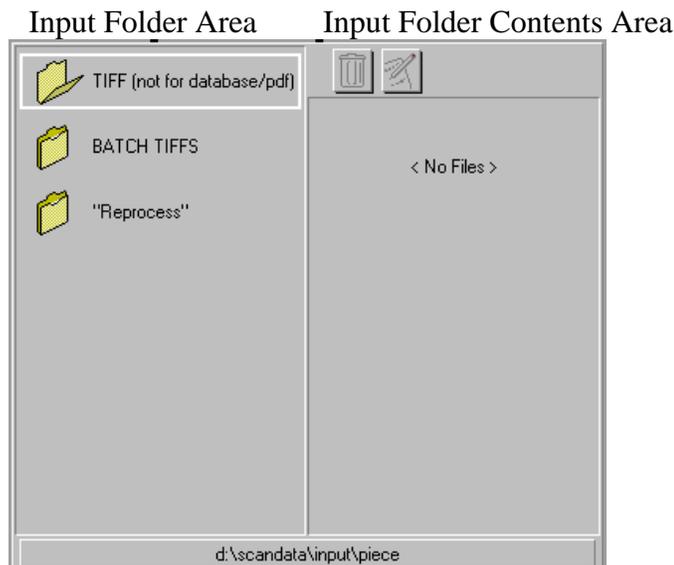
When to choose an Input Folder

An *Input Folder* must be selected before scanning a document that will be processed at a later time. The scanned document(s) will be *stored* in the selected input folder shown in the lower left portion of the screen.

Selecting the Input Folder

The selected input folder will be outlined in white, and the filenames and icons in the folder's directory will appear in the *input folder contents area* on the right. Each input folder has its own input setup parameters.

Sample Input Folder



When to choose an Output Folder

An *Output Folder* must be selected before any document can be converted to the Portable Document Format (PDF). The *processed* document will be *stored* in a designated output folder shown in the upper right portion of the screen.

Selecting the Output Folder

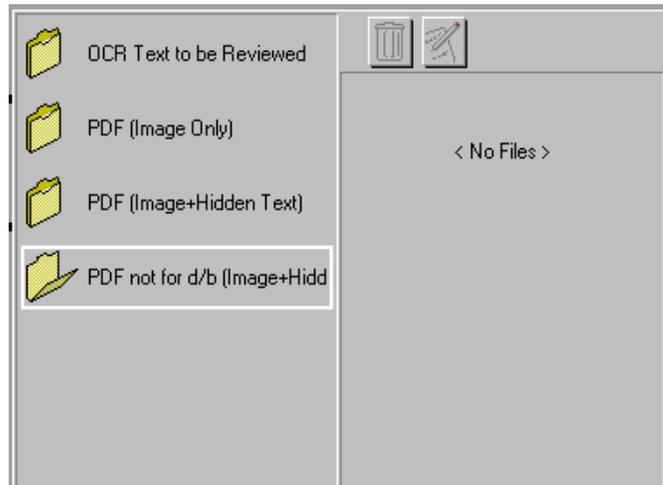
The selected folder will be outlined in white, and the filename and icons in the folder's directory will appear in the *output folder contents area* on the right.

Cleaning out temporary files

Periodically, the *Output Folder contents area* will need the temporary files dumped. Click the file to be deleted, click the *trash can* icon. To delete a number of files, click on the first file to be deleted and hold the shift key down while clicking on the last file to be deleted. Then click the trash can.

Sample Output Folder

Output Folder Area Output Folder contents area



Selecting Output Folder Settings

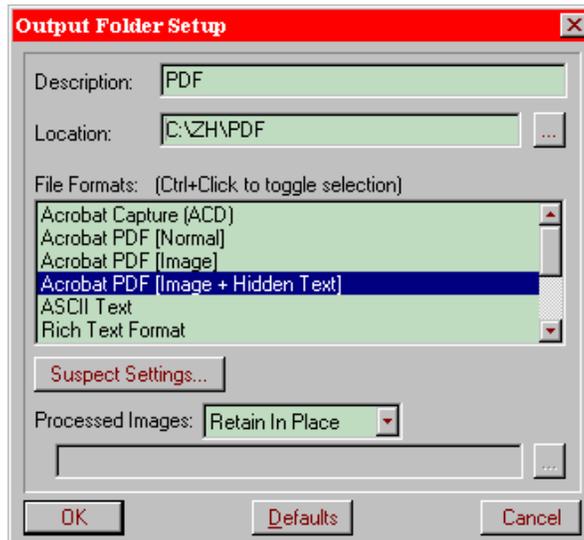
Each folder in Acrobat Capture has its own setup parameters and can output three styles of Portable Document Format (*PDF*) files:

Acrobat PDF [Normal]: Document can be searched, scaled and indexed. This format produces a ‘likeness’ of the scanned page, not an exact replica. Original page formatting is retained and graphics are preserved.

Acrobat PDF [Image]: Documents contain bitmap picture of the original document and has no search capability.

Acrobat PDF [Image + Hidden Text]: Document retains the original bitmap for exact replication. Search capabilities are enabled.

Acrobat Capture will also convert a file so that it can be edited using the *Acrobat Capture Document [ACD]* extension.

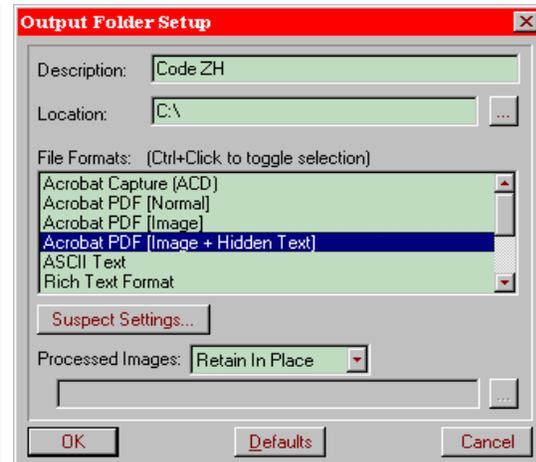


Changing Output Folder Settings

1. Click the desired folder in the ‘*output folder*’ area.
2. Right-click on the output folder icon. The *Output Folder Setup* screen appears.
3. Complete the ‘*Location:*’ field.
4. Click the file output format desired in the ‘*File Formats:*’ field .

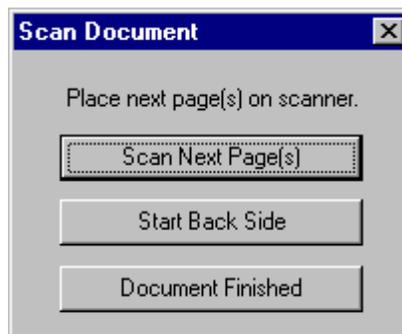
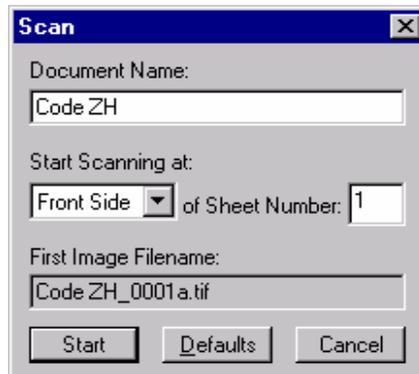
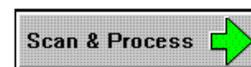


5. Click *OK*. (Note: more than one format may be selected.)



Scanning and Processing a page in a single step [Ctrl +A]

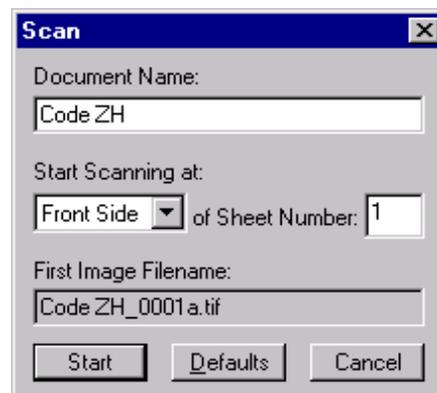
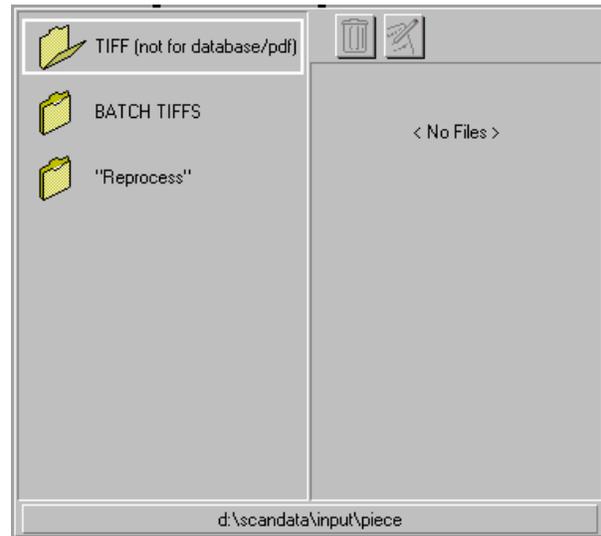
1. Place the document in the scanner's automatic document feeder. (*Select the Scanner with the paper size for the document to be scanned.*)
2. Click the output folder where the *processed* document is to be saved.
3. Click the '**Scan & Process**' button. *The Scan dialog box appears.*
4. Enter the document name in the '**Document Name:**' field. (*The appropriate extension is automatically added.*)
5. Click **Start**. (*The 'Acrobat Capture Server 2.0' screen appears during document processing.*)
6. Click '**Document Finished**' on the *Scan Document* dialog box when scanning and processing is completed. (*A new icon for the PDF document file appears in the output folder contents area.*)



Scanning and Processing a document in two separate steps

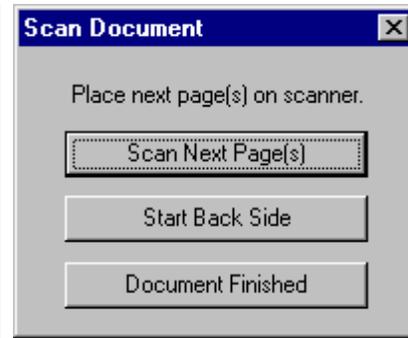
Scanning the document [Ctrl + S]

1. Place the page(s) in the scanner's automatic document feeder. (*Select the Scanner with paper size for the document to be scanned.*)
2. Click the '**input folder**' icon from the *Input folder area* where the document is to be saved.
3. Click the '**Scan**' button. (*The Scan dialog box appears.*)
4. Enter the document name in the '**Document Name:**' field. (*The extension is automatically added.*)
5. Click **Start**. (*'Scanning image to disk' screen appears.*)



6. Click '**Document Finished**' on the *Scan Document* dialog box when scanning is complete. (A new icon appears in the input folder. Each page scanned results in a file sequentially numbered.)

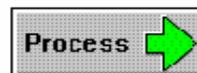
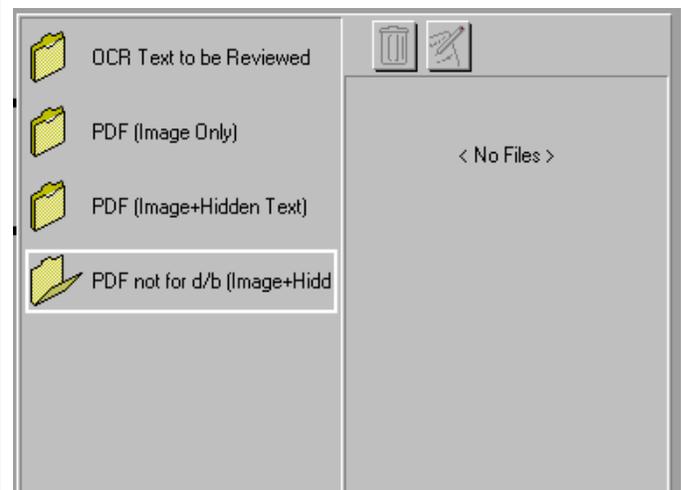
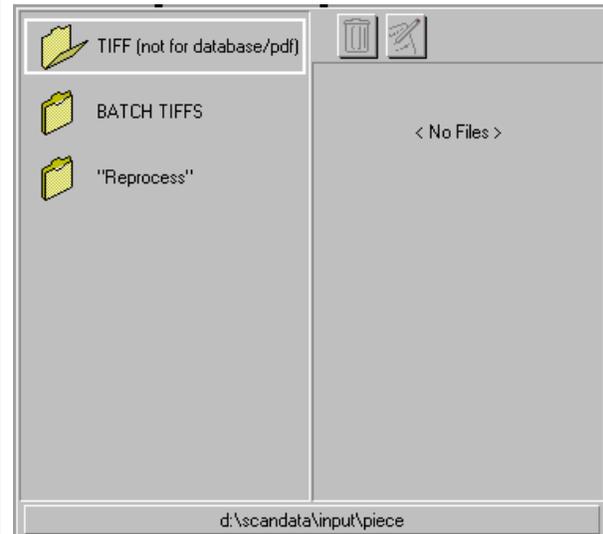
NOTE: The scanned document can be kept in the input folder and processed at a later time.



Processing the document [Ctrl + P]

This process can be done at any time once the document has been scanned and saved in an input folder.

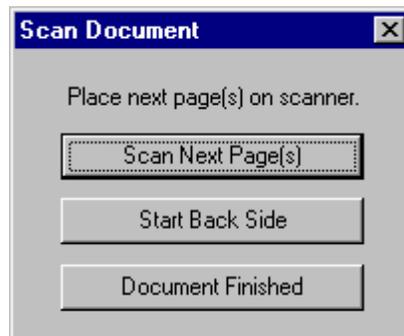
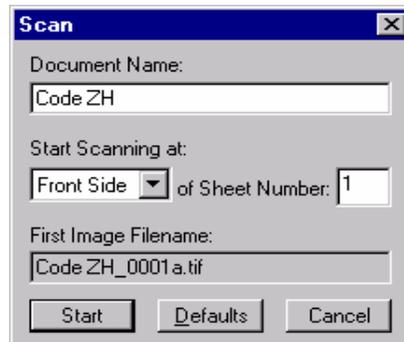
1. Click the folder icon in the '**input folder**' area containing the document files to be processed.
2. Click on the icon of the file (.tif) to be processed. (**For multiple page selection:** click on the icon of the first file, hold the shift key, click on the icon of the last file to be processed. The files to be processed will be highlighted.)
3. Click the folder icon in the '**output folder**' area where the document is to be saved after processing.
4. Click the '**Process**' button. (The 'Acrobat Capture Server 2.0' screen appears during document processing).



Scanning and Processing a document with 100 or more pages

1. Place document pages in the scanner's automatic document feeder. (*Document should not exceed 100 pages. Adobe Capture has difficulty creating .pdf files in excess of 100 pages.*)
2. Click the input folder icon from the input folder area where the document is to be saved.
3. Click the 'Scan' button. (*The Scan dialog screen appears.*)
4. Type the document name in the '**Document Name:**' field. (*The filename extension is automatically added.*)
5. Click **Start**. (*'Scanning image to disk' screen appears.*)
6. Click '**Document Finished**' on the Scan Document dialog box when scanning and processing is completed. (*A new icon appears in the input folder. Each page scanned results in a file sequentially numbered.*)

Repeat steps 1 through 7 for the next batch of pages (not to exceed 100).



View the PDF or ACD from Acrobat Capture

1. While in Acrobat Capture, locate in the 'Output' folder the file to be viewed.
2. Double-click on the desired file. (*Acrobat Exchange or Reviewer launches.*)
3. Click 'View' on the menu to alter viewing options. (*This option in Acrobat Exchange only.*)
4. Exit *Adobe Exchange* by clicking 'File' on the menu and click 'Exit' to return to the Adobe Capture screen.



Acrobat Exchange

Acrobat Exchange allows the user to view and edit electronic PDF documents.

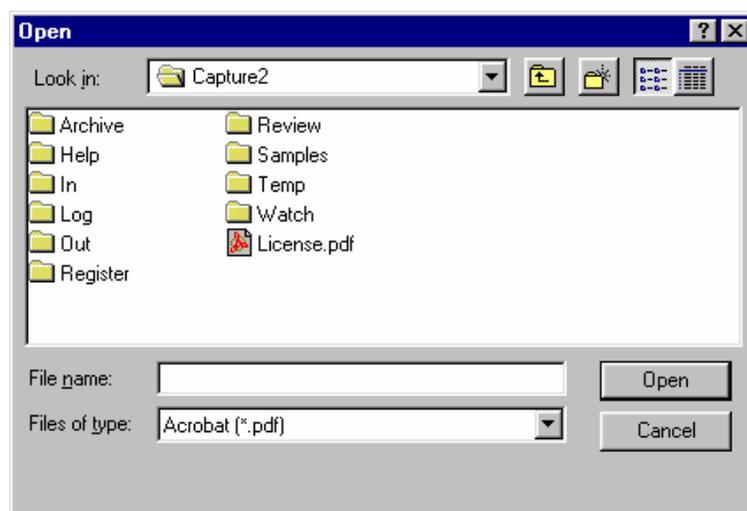
Starting Acrobat Exchange

1. Click 'Start'
2. Click 'Programs'
3. Click 'Adobe Acrobat'
4. Click 'Acrobat Exchange'



Open an existing PDF document [Ctrl + O]

1. Click 'File' on the Acrobat Exchange menu.
2. Click 'Open'. (The 'Open' dialogue box appears.)
3. Type the document file name in the 'File Name:' field or double-click on the file.
4. Click Open. (Acrobat Exchange opens the document)

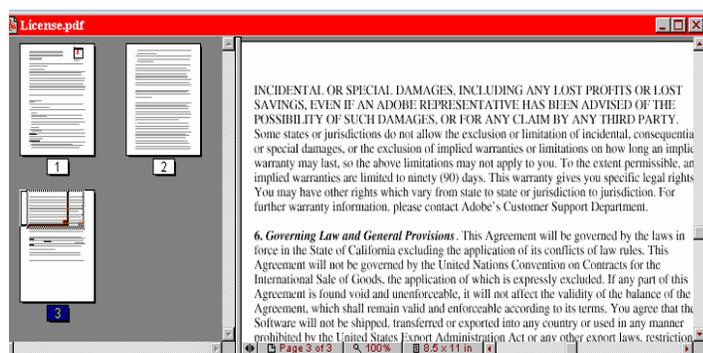


Using Thumbnails

A thumbnail is a miniature view of each page in the document and is displayed in an overview area.

Create a thumbnail

1. Click 'Document' on the menu.
2. Click 'Create all thumbnails'.



Browse a document using

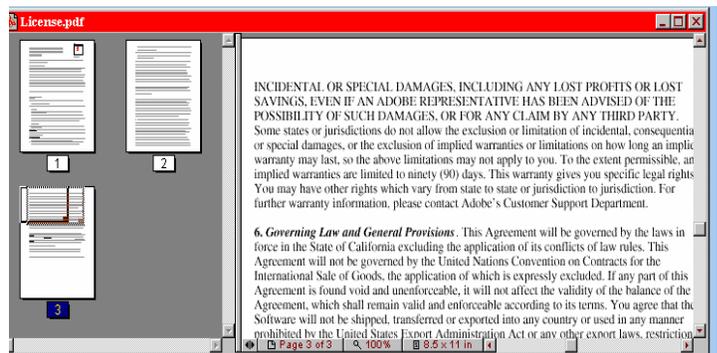
thumbnails

1. Click 'View' on the menu.
2. Click 'Thumbnails and Page'.
3. Click a thumbnail to choose a page it represents.

Note: If thumbnail appears as a gray box in the overview area, click Document> Create All Thumbnails to have the pages displayed.

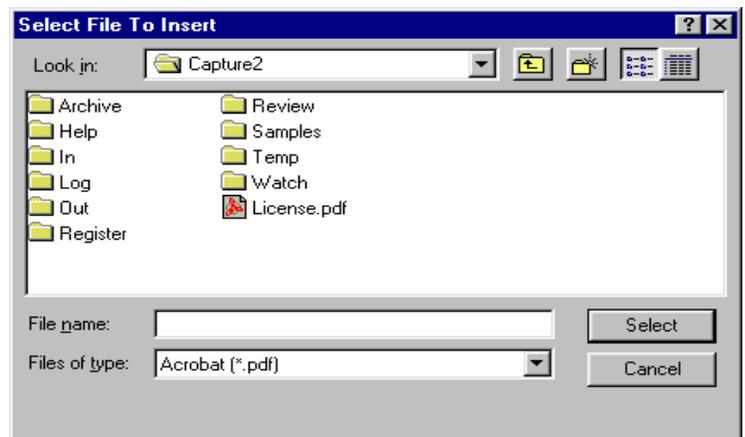
Move a page using thumbnails

1. Click on the desired thumbnail page number box.
2. Left click and drag the thumbnail page icon to the new location. *(When the mouse is released the pages will be inserted and all subsequent pages will be renumbered.)*

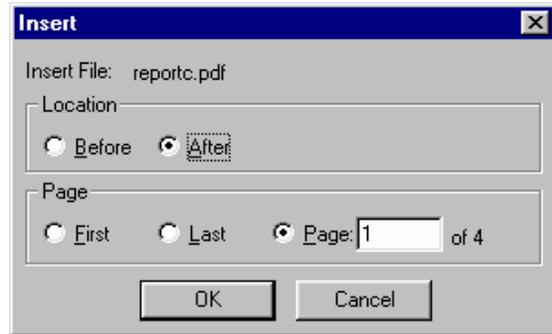


Edit a document - Insert a page [Ctrl + Shift + I]

1. Click 'Document' on the menu.
2. Click 'Insert Pages'. *(The 'Select File to Insert' dialog screen appears.)*
3. Type the name of the document file in the 'File Name:' field.
4. Click 'Select'. *(The 'Insert' dialog screen appears.)*
5. Click the radio button to determine where the location of the new pages should be

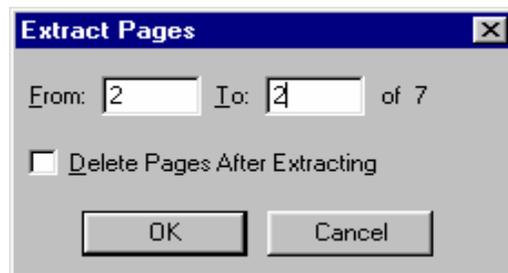


- placed.
6. Click *OK*.
 7. Click *'File'* on the menu, then *'Save'*.



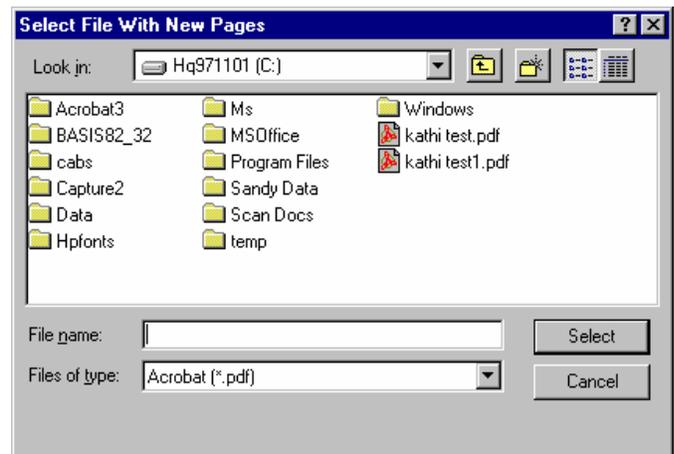
Edit a document - Extract a Page [Ctrl + Shift + E]

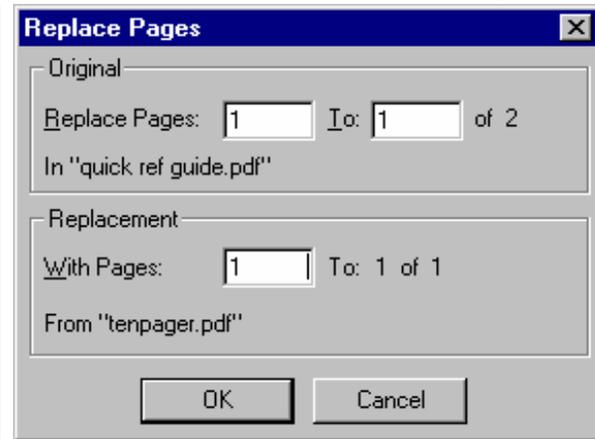
1. Click *'Document'* on the menu.
2. Click *'Extract Pages'*. (The *'Extract Pages'* dialogue screen appears.)
3. Type the pages to be extracted.
4. Click *OK*.
5. Click *'File'* on the menu, click *'Save'*.



Edit a document - Replace Pages [Ctrl + Shift + R]

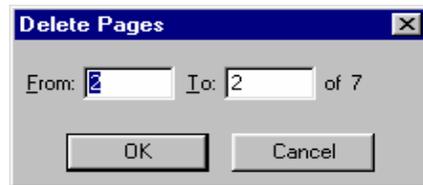
1. Click *'Document'* on the menu.
2. Click *'Replace Pages'*. (The *'Select File With New Pages'* dialog screen appears.)
3. Select the file to be replaced.
4. Click *'Select'*. (The *'Replace Pages'* dialog screen appears.)
5. Complete the required fields.
6. Click *OK*.
7. Click *'File'* on the menu, click *'Save'*.





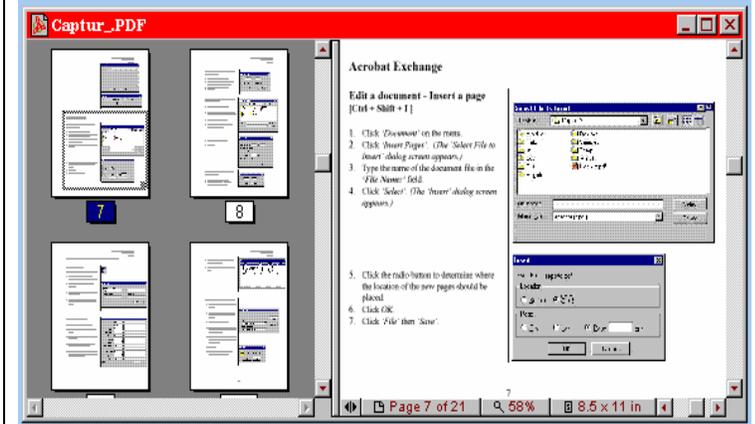
Edit a document - Delete Pages [Ctrl + Shft + D]

1. Click 'Document' on the menu.
2. Click 'Delete Pages'. (The 'Delete Pages' dialog box appears.)
3. Click 'File' on the menu, click 'Save'.



Delete pages using thumbnails

1. Click the page number box on the thumbnail page to be deleted.
2. Click the 'delete' button.
3. Click 'File' on the menu, click 'Save'.



Acrobat Reviewer

Acrobat Reviewer is used to find and correct words that Acrobat Capture may have recognized incorrectly.

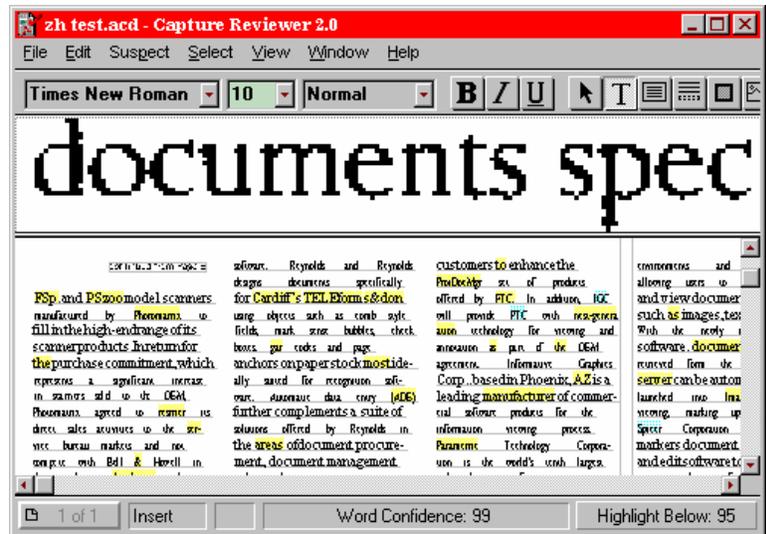
Starting Acrobat Reviewer

1. Click 'Start'
2. Click 'Programs'
3. Click 'Adobe Acrobat'
4. Click 'Acrobat Capture Reviewer'



Correct a ACD document

1. Open desired document to be corrected.
2. Press 'Tab'. (The insertion point moves to the beginning of the first suspect word. The bitmap image of the line appears at the top of the window.)
3. Double-click to select the suspect, and type the correction. (Press tab to move to the next suspect.)

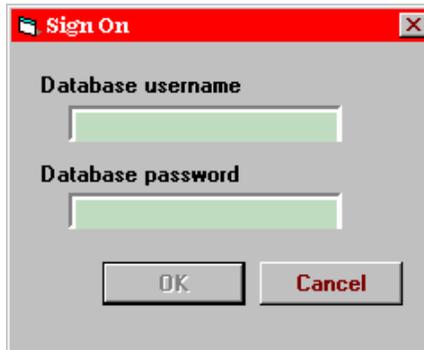
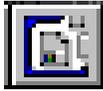


ZH Document Management System (ZH DMS)

Starting ZH DMS

1. Select the ZH DMS Basis Desktop icon.
2. Type your user id in the 'Database username' field and 'Database password'.
3. Click the *OK* button. (ZH DMS displays the *Find* screen.)

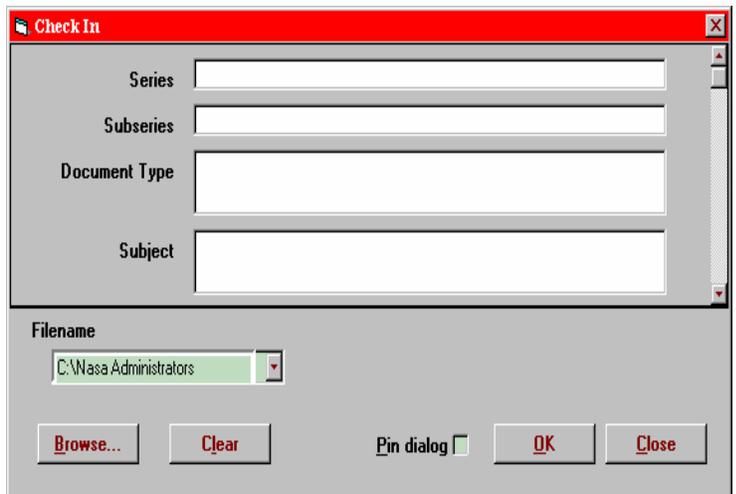
Note: To retrieve a full list of every document, leave the fields blank and click the 'Find' button.



Check-in a document



1. Create document in the appropriate application. Follow the steps to 'Start ZH DMS'.
2. Click 'Check-in' on the Document menu.
3. Complete the field group entries on the 'Check-in' dialog screen.
4. In the 'filename' field, **type the file path and extension** or click the '**Browse**' button to locate the document if it is not known.
5. Click *OK*.



Using Terms dialog with document check-in

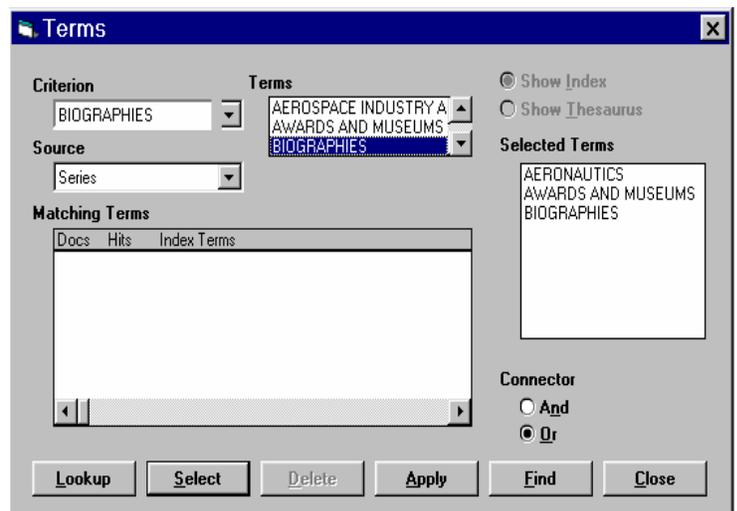
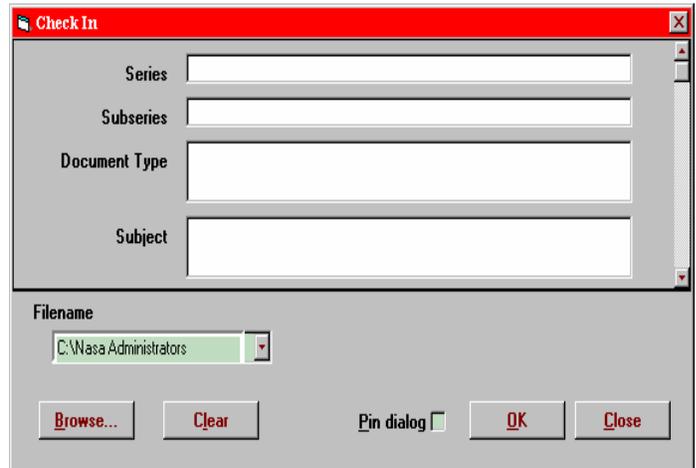


1. Click 'Check-in' on the Document menu.
2. Click in the desired field. (e.g. Series, Subseries)
3. Click 'Terms' on the Find menu.
4. Click on the desired term in the Terms box.
5. Click 'Select'. (The term will appear in the 'Selected Terms' box.)

Note: Double-clicking on the desired term will also select the term and place it in the Selected Terms box.

6. Highlight the term(s) to be inserted into the desired field in the 'Selected Terms' box.
7. Click 'Apply'. (The selected term(s) will be inserted in the field.)
8. Click 'Close' to close the term dialog box.

Note: (If every term in the 'Selected Term' box is desired, do not highlight any term.)



Find a DMS document



1. Click 'by form' on the Find menu.
(The 'Find' screen appears.)
2. Determine the fields to use for the search criteria.
3. Click into the desired field and type in the search value.
4. Set the test operator by clicking on the appropriate list indicator (▼).
5. Click 'Find'.

Note: To retrieve a list of all documents, leave the fields blank and click the 'Find' button.)

Record No	=	
Series (List)	includes	
Subseries (List)	equals	
Document Type (List)	includes	
Subject	includes	
Folder Title	includes	Humphrey, H.H. Speeches of
Document Date	contains any	
Location	contains any	
Description	equals	
Name(s)	equals	
Date Entered	on	

And
 Or

6. Search results will be displayed on the 'Find Results' screen.
7. Double-click on the desired document to view.

#	Series (List)	Subseries (List)	Document Type (List)	Subject
1	BIOGRAPHIES	ASTRONAUTS	PHOTOGRAPHS	GRISSOM, VIRGIL I. ("GUS")
2	BIOGRAPHIES	ASTRONAUTS	MANUSCRIPTS; PRESS	COATS, MICHAEL L.
3	BIOGRAPHIES	NASA ADMINISTRATORS	MANUSCRIPTS;	CONSTAN, GEORGE N.
4	BIOGRAPHIES	ASTRONAUTS	PRESS RELEASES;	BOBKO, KAROL J. ("BO")
5	BIOGRAPHIES	NASA EMPLOYEES	MANUSCRIPTS	MISCELLANEOUS
6	BIOGRAPHIES	ASTRONAUTS	MANUSCRIPTS;	ALDRIN, EDWIN E., JR. ("BU")
7	BIOGRAPHIES	ASTRONAUTS	PHOTOGRAPHS	ARMSTRONG, NEIL A.
8	BIOGRAPHIES	NASA EMPLOYEES	MANUSCRIPTS; ORAL	DONNELLY, PAUL C.
9	BIOGRAPHIES	POLITICAL FIGURES	SPEECHES; TRANSCRIPTS	HUMPHREY, HUBERT H.
10	BIOGRAPHIES	SCIENTISTS	MANUSCRIPTS	ALEKSEYEV, LEONID A.
11	BIOGRAPHIES	COSMONAUTS	MANUSCRIPTS	ALEXANDROV, ALEXANDER
12	BIOGRAPHIES	COSMONAUTS	MANUSCRIPTS	AHAD, MOHMAND ABDULLA
13	BIOGRAPHIES	NASA ADMINISTRATORS	MANUSCRIPTS	COLVIN, BILL D.
14	BIOGRAPHIES	NASA ADMINISTRATORS	MANUSCRIPTS	COOPER, BENITA A.
15	BIOGRAPHIES	ASTRONAUTS	PHOTOGRAPHS;	DUFFY, BRIAN
16	BIOGRAPHIES	NASA ADMINISTRATORS	PHOTOGRAPHS; PRESS	ALLEN, LEW, JR.
17	BIOGRAPHIES	ASTRONAUTS	SPEECHES	ANDERS, WILLIAM A.
18	BIOGRAPHIES	GOVERNMENT OFFICIALS	MANUSCRIPTS	ALLEN, RICHARD V.
19	BIOGRAPHIES	SCIENTISTS	MANUSCRIPTS; NACA	ALLEN, H. JULIAN

Find a document using the Terms dialog



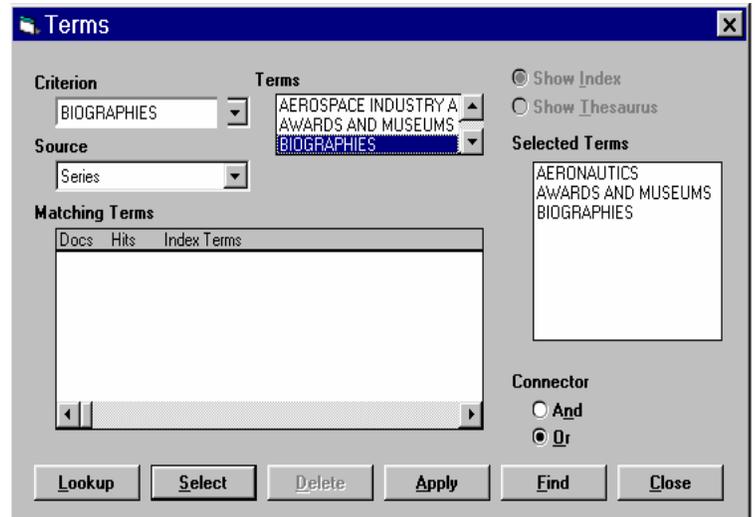
1. Click 'Terms' on the Find menu.
2. Click the name of the search field from the Source droplist box (▼).
3. Click on the term(s) to be matched in the Terms box.
4. Click 'Select'. (The term will appear in the 'Selected Terms' box.)

Note: Double-click the desired term will also select the term and place it in the Selected Terms box.

5. Click a 'Connector' operator.

Note: 'AND' will select all marked terms in the selected field. 'OR' will select any marked terms in the selected field.

6. Highlight the term(s) to be matched in the 'Selected Terms' box. (If every term in the 'Selected Term' box is desired, do not highlight any term.)
7. Click 'Find'. (The 'Find Results' screen appears.)

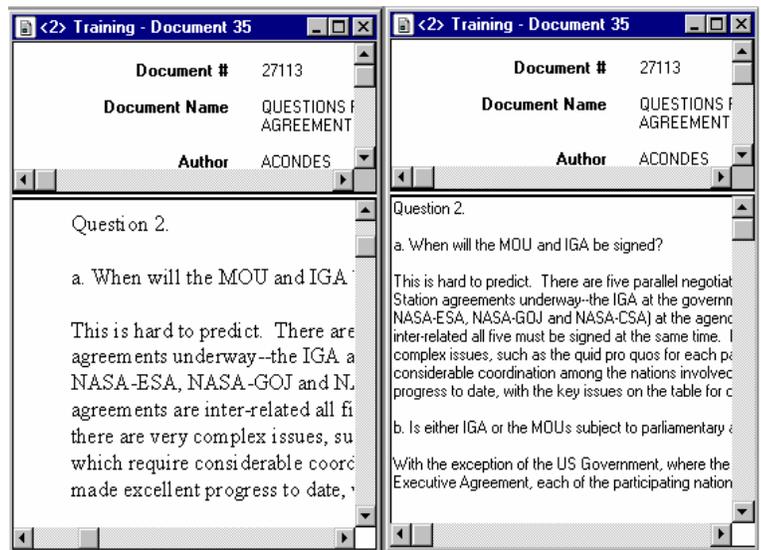


View a document in Draft or Layout.

1. Open the document from the 'Find Results' screen.
2. Click 'View' on the menu.
3. Click the appropriate view option ,

Draft or Layout. (The active view is annotated with a check mark on the menu.)

Note: 'Draft' view allows hit-to-hit scrolling and viewing of external file icons. 'Layout' view allows for text stream viewing as the document was originally formatted. Limitations exist in layout view.



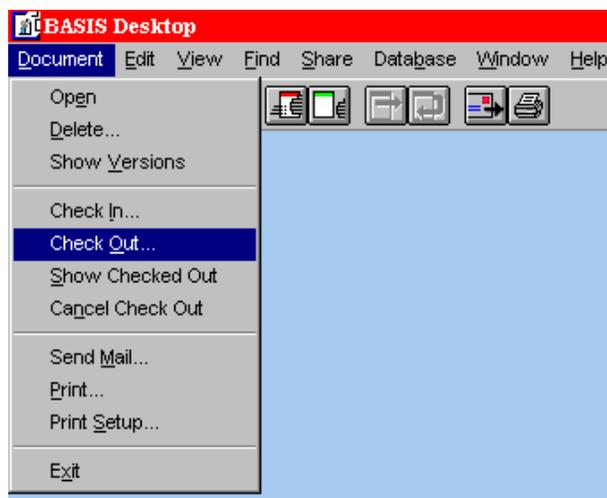
Layout View

Draft View

Check-out a document for editing

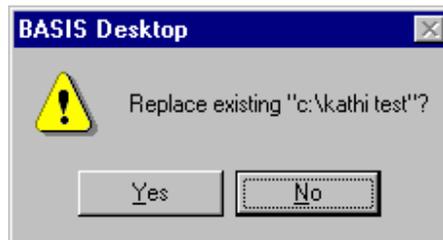
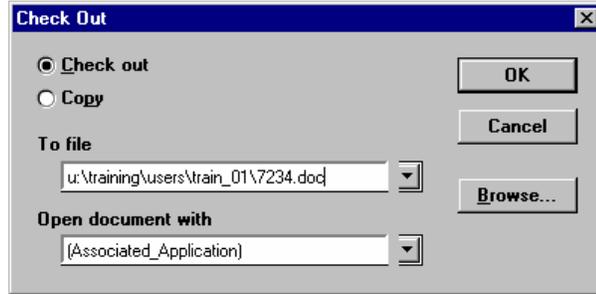


1. Find the desired document by conducting a search.
2. Click 'Check Out' on the Document menu. (The 'Check Out' dialog screen appears.)
3. In the 'To file' field, type the file path and extension or click the 'Browse' button to locate the



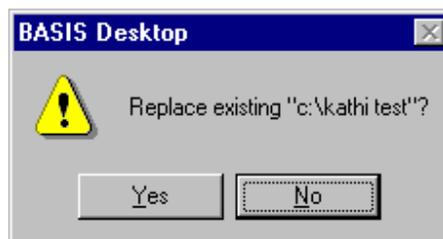
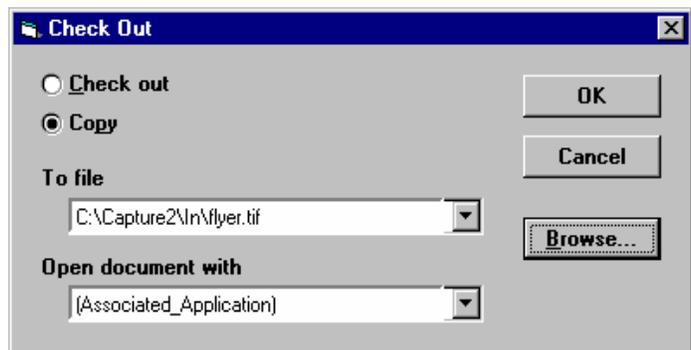
document.

- The 'Open document with' field should show (Associated_Application) to launch the application such as Word, Excel, Powerpoint, or Acrobat Exchange.
- Click *OK*. ('Replace existing' screen appears. Select the appropriate choice.)



Check-out a copy of a document

- Find the desired document by conducting a search.
- Click 'Check-out' from the Document menu. (The 'Check Out' dialog screen appears.)
- Click the 'copy' radio button.
- In the 'To file' field, type the **file path and extension** or click the 'Browse' to locate the document.
- The 'Open document with' field should show (Associated Application) to launch the application.
- Click *OK*. ('Replace existing' screen appears. Select the appropriate choice.)

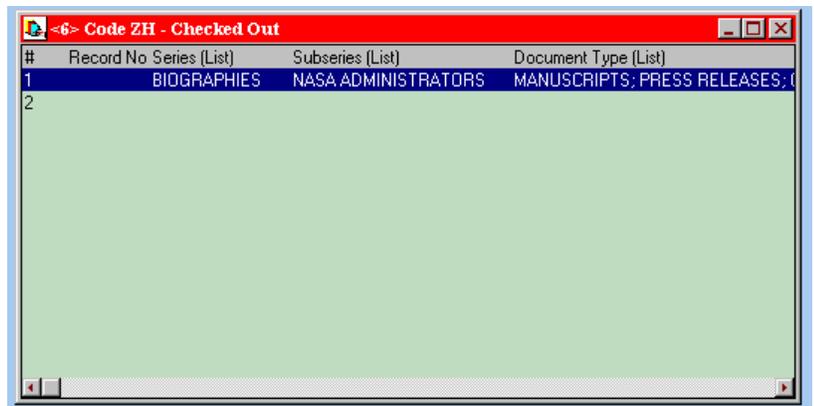


Show Checked-out documents

1. Click 'Show Checked Out' on the Document menu.

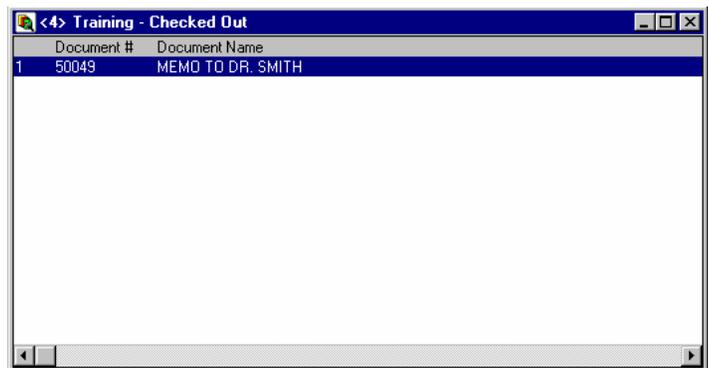


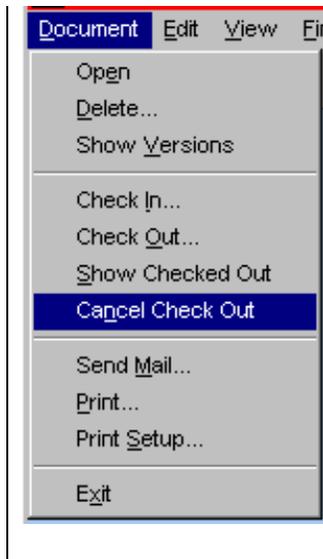
2. The 'Checked Out' dialog box appears listing your checked out documents.



Cancel Document Check Out

1. On the 'Checked out' dialog screen, select the document to be canceled.
2. Select 'Cancel Check-out' from the Document menu. (Note: To verify document cancel, click Show Checked-out on the Document menu.)

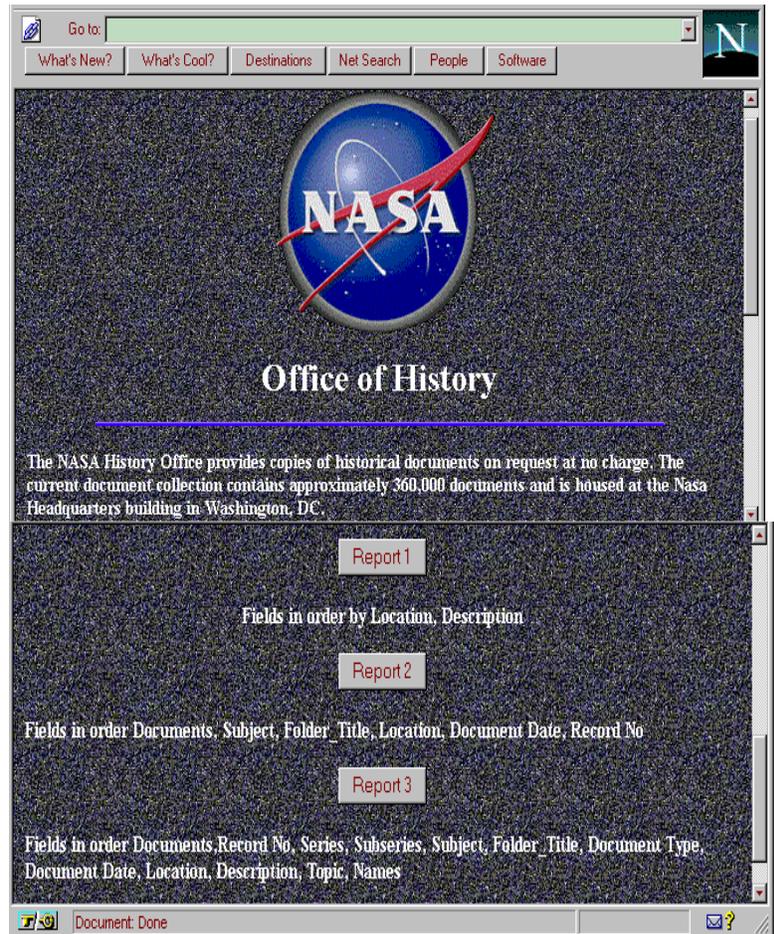




Web Page Document Retrieval

Logging into ZH DMS

1. Open Netscape.
2. Type the URL address in the 'Location' field and press Enter. (The 'Office of History' screen appears.)
3. Click the 'Report' type desired. (The 'Log into Basis' screen appears.)
4. Type your username and password in the 'Basis Username' and 'Basis Password' fields.
5. Click 'OK'. (The 'Find' screen appears.)



Log into BASIS

BASIS username:

BASIS password:

Find a DMS Document from the Web Page



1. Complete the ZH DMS Web log on process.
2. On the 'Find' screen, determine the fields to use for the search criteria.
3. Click into the desired field and type in the search value. (*Note: To retrieve a list of all documents, leave the fields blank and click the 'OK' button.*)
4. Set the test operator by clicking on the appropriate list indicator (▼).
5. Click the 'OK' button.
6. The 'Find Documents' Results screen appears listing Documents.

A screenshot of a Netscape browser window titled "Netscape - [<CODEZH.ZHCORE>ZHCORE Search Form]". The browser's menu bar includes "File", "Edit", "View", "Go", "Bookmarks", "Options", "Directory", "Window", and "Help". Below the menu bar is a toolbar with buttons for "Back", "Forward", "Home", "Reload", "Images", "Open", "Print", "Find", and "Stop". The address bar shows "Go to:" followed by a dropdown menu. Below the address bar are buttons for "What's New?", "What's Cool?", "Destinations", "Net Search", "People", and "Software". The main content area contains a search form with several sections: "BASIS" (with a search icon), "Search" (with a magnifying glass icon), "Terms" (with a magnifying glass icon), "Summary", "Expand", "Down Lead", "Prior", "Top", "Up", "Down", "Bottom", "Next", and "Help". Below these icons are "Ok" and "Clear" buttons. The form has several input fields, each with a dropdown menu for the test operator. The fields are: "Record Number :", "Series :", "Subseries :", "Document Type :", "Subject :", "Folder Title :", "Document Date :", and "Location :". Each field has a dropdown menu with "contains the phrase" selected and a text input field.

Description :
contains the phrase

TEXT :
contains the phrase

Fields : Entered By
contains the phrase

Order By: NONE Sort Order: Ascend Field Connector:
OR

Ok Clear

BASIS Search Terms Summary Expand Download Prior Top Up Down Bottom Next Help

Document: Done

Retrieve and view a document



1. From the 'Find Documents Results' screen, click on the desired item. (The 'Metadata' screen appears.)
2. Click 'Down Load'. (Acrobat Exchange launches.)

BASIS Search Terms Summary Expand Download Prior Top Up Down Bottom Next

Record Number: 20003
Subject: ZHTEST
Folder Title: TEST100
Entered By: USER02
Updated By: USER02
Date Entered: May 06, 1998

Document: Done



Microsoft Access

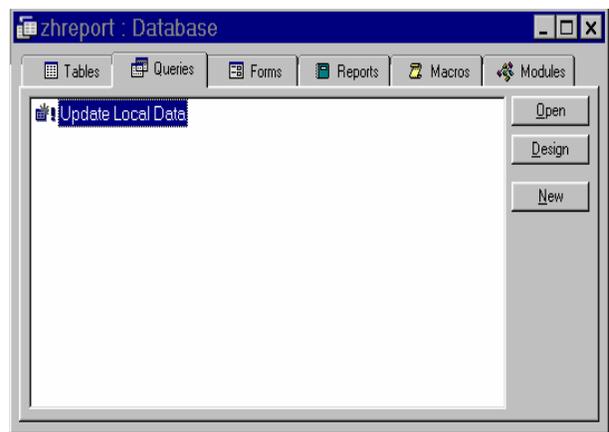
Starting Microsoft Access

1. Click 'Start'
2. Click 'Programs'
3. Click 'Microsoft Access' (*The Microsoft Access screens appears.*)
4. Click radio button 'Open an Existing Database'
5. Click the database file to be opened.
6. Click 'OK' or double-click on the database file name. (*The selected database opens.*)



Update local data

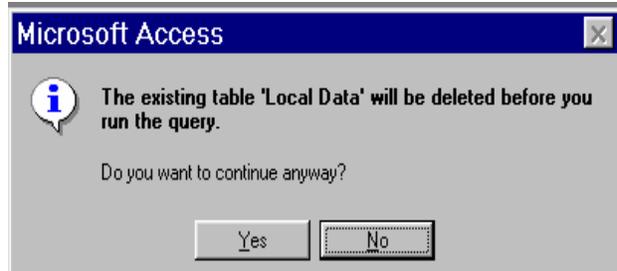
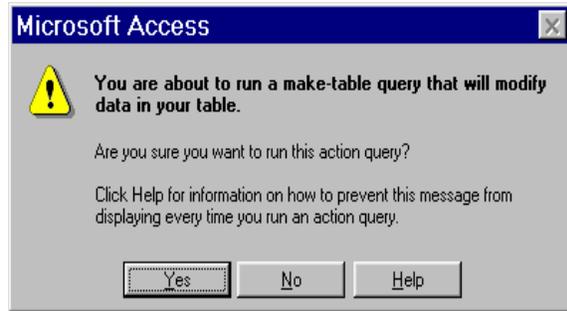
1. Click the 'Queries' tab.
2. Highlight 'Update Local Data'.
3. Click 'Open' or double-click the selection. (*The Access screen will read "You are about to run a make-table query..."*)
4. Click 'Yes'. (*The Access screen will read "The existing table 'Local Data' will be deleted..."*)
5. Click 'Yes'. (*The Access screen will read "There isn't enough disk space..."*)
6. Click 'Yes'. (*When processing is complete, the Access screen will read*



“You are about to paste...”)

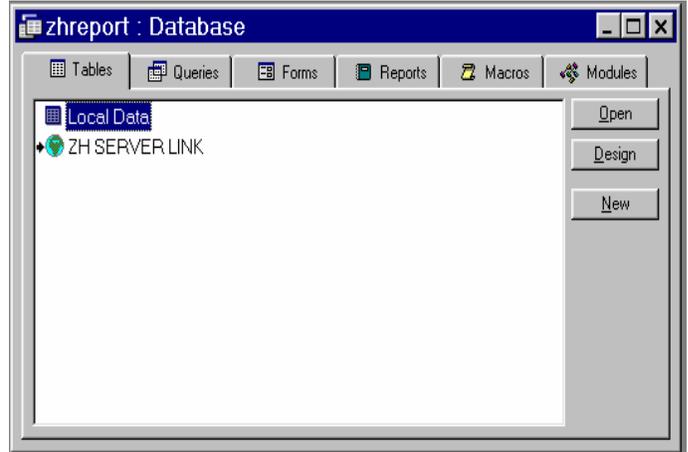
Note: It will take the system about 3 mins.
to process the request.

7. Click ‘Yes’.



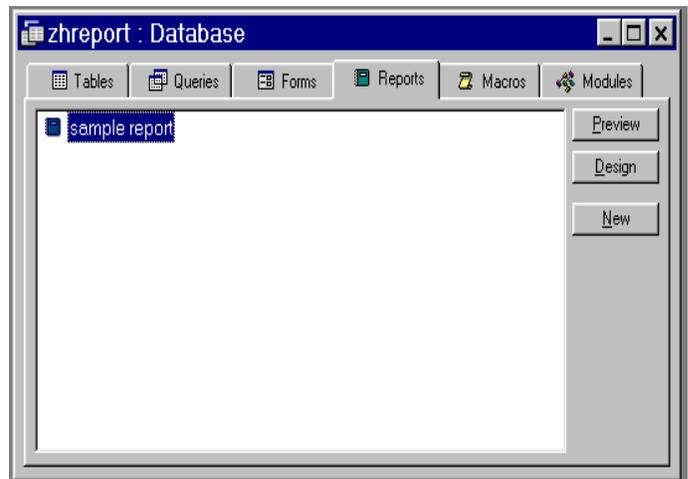
To view data

1. Click the *'Tables'* tab.
2. Double-click *'Local Data'* or Click *'Open'*.



Run a Report

1. Click the *'Reports'* tab.
2. Double-click on the existing report or click *'Preview'*.



ASSISTANCE

The Help Menu provides the user access to instruction on most HQ DMS functions. For DMS Technical Assistance, contact the NASA IR & MS Service Center:

358-HELP (4357)

APPENDIX

Acrobat Capture: Suspect Words

Acrobat Capture identifies five types of suspect words. When viewing in Acrobat Reviewer the highlighted color indicates the words suspect type:

Words with confidence levels below the specified threshold are *recognition suspects*. Capture doubts that they have been recognized correctly. *Recognition suspect* words are highlighted in *yellow*.

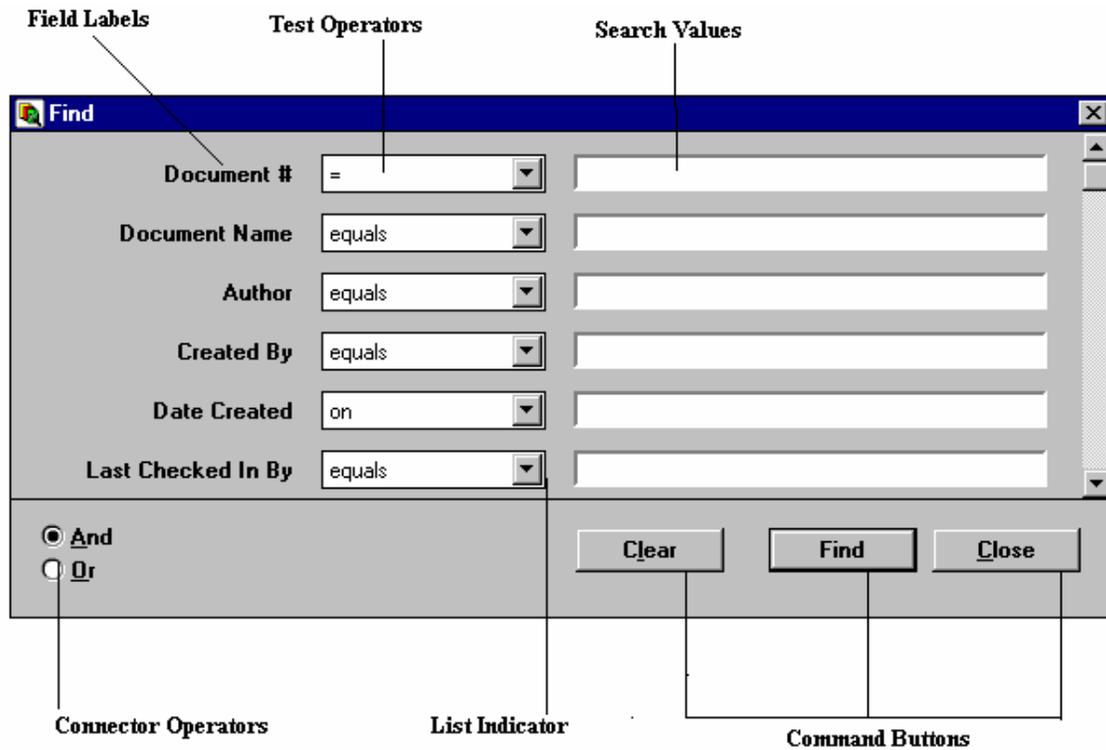
Words not found in the dictionary are *spelling suspects* and highlighted in *blue*.

Words with uncertain fonts are *font suspects* and highlighted in *green*.

Words with a mix of alphabetic and numeric characters are *alpha-numeric terms* and highlighted in *magenta*.

Words containing all numerals are *numeric terms* and highlighted in *orange*.

Basis Desktop Concepts: Defining the search criteria



Find Form Components

<i>field labels</i>	specifies the field you want the system to search
<i>test operators</i>	indicates the desired relationship between the search values and the data in the field(s) being searched
<i>search values</i>	specifies the data you want the system to compare each document's field against
<i>connector operators</i>	combines two or more search conditions

Test Operators

Test Operators indicate the relationship between the search value and the data in the field being searched.

Numeric fields Test Operators

This test operator	Searches for a value that
=	matches the search value
>	is greater than the search value
>=	is greater than or equal to the search value
<	is less than the search value
<=	is less than or equal to the search value
not =	does not match the search value

Text Test Operators

This test operator	Searches for
includes	any keywords in any order (<i>when the search values are separated with commas or ampersands</i>)
contains all	all keywords in any order
contains any	all keywords in any order
contains the phrase	all keywords and stopwords* in exact order and position

**Keywords* are words that are not stopwords. *Stopwords* are small, common words that have little retrieval value, such as “*the, a, of, and for*”. Stopwords are used as search values in find operations that involve the exact matching of character strings.

Date Fields Test Operators

This test operator	Searches for a date that
on	matches the search value
after	is greater than the search value
on or after	is greater than or equal to the search value
before	is less than the search value
on or before	is less than or equal to the search value
not on	does not match your search value

Wildcards

?	represents one miscellaneous character
*	represents 0-15000 miscellaneous characters
#	represents 1 miscellaneous character string in a phrase

Character patterns (** or ?*) can be used in a search only when the test operator is:

equals = (for numeric)

is not not = (for numeric)

contains any

Phrase patterns contain a #. Phrase patterns can only be used when the test operator is “*contains in order*”.

PROTOTYPE TERMS SCREEN

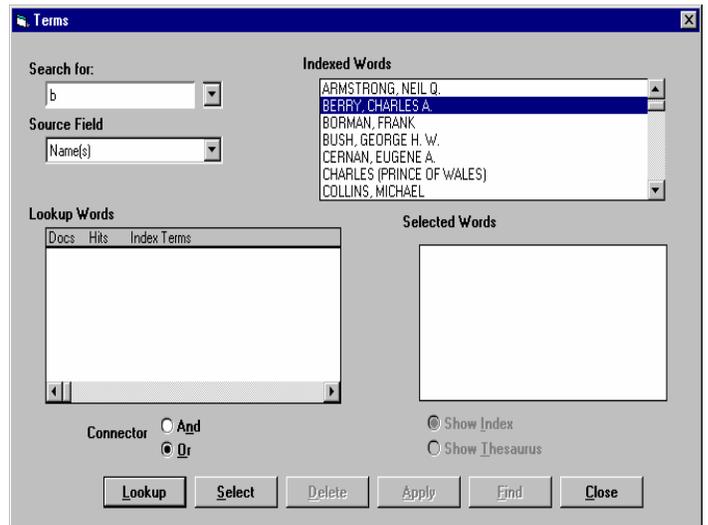
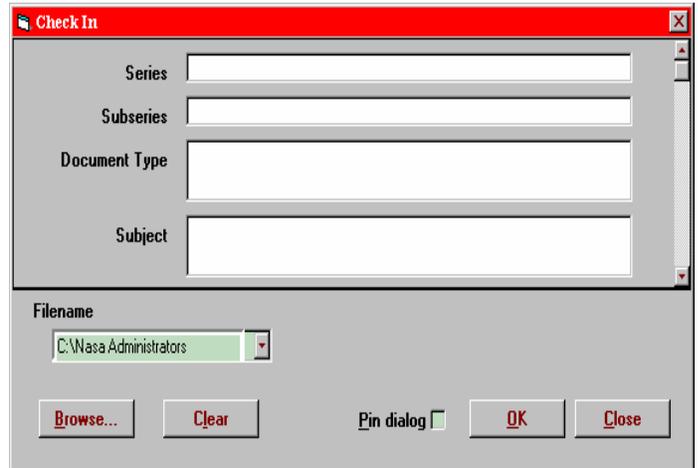
Using terms dialog with document check-in

1. Click 'Check-in' on the Document menu.
2. Click in the desired field. (e.g. Series, Subseries)
3. Click 'Terms' on the Find menu.
4. Click on the desired term in the Terms box.
5. Click 'Select'. (The term will appear in the 'Selected Terms' box.)

Note: Double-clicking on the desired term will also select the term and place it in the Selected Terms box.

6. Highlight the term(s) to be inserted into the desired field in the 'Selected Terms' box.
7. Click 'Apply'. (The selected term(s) will be inserted in the field.)
8. Click 'Close' to close the term dialog box.

Note: (If every term in the 'Selected Term' box is desired, do not highlight any term.)



Find a document using the terms dialog



1. Click 'Terms' on the Find menu.
2. Click the name of the search field from the Source droplist box (▼).
3. Click on the term(s) to be matched in the Terms box.
4. Click 'Select'. (The 'term' will appear in the 'Selected Terms' box.)

Note: Double-click the desired term will also select the term and place it in the Selected Terms box.

5. Click a 'Connector' operator.

Note: 'AND' will select all marked terms in the selected field. 'OR' will select any marked terms in the selected field.

6. Highlight the term(s) to be matched in the 'Selected Terms' box. (If every term in the 'Selected Term' box is desired, do not highlight any term.)
7. Click 'Find'. (The 'Find Results' screen appears.)

