

CU Admins –

Searching idocVAULT can be simplified by adding a one-click button using the custom search functionality in 2020DOC. This is beneficial for staff who search for the same details, such as a form type or date range, numerous times a day.

These settings and features may not be available for all clients. If you do not see them, please contact your solution provider.

Setting up a one-click button is very easy for anyone with administrator credentials. The first step is to open 2020DOC, click the **Search** tab, and click **Add/Change Query**.



To add a predefined search, click **New** to open a new Search window.

Search	
Search:	Save As Delete New Parameter Based Search Close
Tables:	Fields: Show System Fields Text Dates Numbers
	© Before: ◎ From: 1/ 7/2014 To: 1/ 7/2014 To:
	Add Remove Clear All

In the Tables window, check all the tables you want to search. Fields that are common among all the tables checked will display in the Fields window. If any of the data is located in hidden system fields, check the **Show System Fields** box to display ALL fields.

Search: MemberReceipts 👻	Save As Delete New	Parameter Based Search Close
localhost Checks Employees_Current ESIGN FedChecks Loan_Documents Master Master Miscellaneous_Documents Receipts Cransfers Statements Summary	Doc_ID Loc_ID Size FilePath Created_By Created_On Expires_On Notes Full_Text_Filename Page_Count Archive_Volume Archive_Date Archive_Purge Crypt_ID Account Other Pennics	On: After: Before: From: Z/10/2014 To: Z/10/2014 Add Remove Clear All
	Criteria	

In the Fields window, highlight the field(s) you want to search. Based on the data type of the field selected, one of the field type tabs (Text, Dates, or Numbers) displays on top. To fill in the criteria for the field selected, click **Add**. This places the

newly defined search criteria into the Criteria window. Continue this process until all the criteria you want to search for is in the Criteria window.

Search		
Search:	•	Save As Delete New Parameter Based Search Close
fables:		Fields: Show System Fields Text Dates Numbers
localhost	200803 200805 200806	_Doc_ID _Loc_ID _FilePath _Created_By Created_By Expires_On Expires_On
Checks2	200809 200810 200811 200801 200901 200902	_Notes _Full_Text_Filename _Page_Count _Archive_Volume _Archive_Date _Archive_Purge Crupt ID Crupt ID
Checks2	200903 = 200904 200905 200909	_FOIfset _FSize _FCheckSum ROffset
>	nt	Expires_On IS ON 2014-02-10
▷ইন্দ্র] InsuranceClaims_ ▷ইন্সী Loan_Documents ▷ইন্সী Master ▷ইন্সী Miscellaneous_D	ocumen	
Receipts	•	

When finished, click **Save As** to open the Save Search As window. Enter the name of the predefined search.

Tables: Fields: Show System Fields Text Dates Numbers Image: Doc_ID Doc_ID Doc_ID Image: Doc	Search: Save As) Delete New Parameter Based Search Close				
Esign FedChecks	Search:	Save As Delete New Parameter Based Search Close Fields: Image: Show System Fields Text Dates Numbers Loc ID FilePath Image: Solution of the system fields Image: Solution of the system fields Image: Solution of the system fields FilePath Image: Solution of the system fields Image: Solution of the system fields Image: Solution of the system fields Found Image: Solution of the system fields Image: Solution of the system fields Image: Solution of the system fields Found Image: Solution of the system fields Image: Solution of the system fields Image: Solution of the system fields Found Found Image: Solution of the system fields Image: Solution of the system fields Image: Solution of the system fields Found Found Solution of the system fields Image: Solution of the system fields Found Found Solution of the system fields Image: Solution of the system fie			

Click **OK** to add the new predefined search to the Search drop-down list. This will now show your selection as a new search in 2020DOC and new tab in idocVAULT under the Documents tab.





Tech Tip Contributor Riley Sullivan, Client Development Specialist

If you have any questions about this feature, please reach out to our Client Development team.

Have a tip to share with our community or a suggestion for a tip you'd like to see? <u>Send us your tip here</u>, and if chosen, we'll send you a gift card and give you the contributor's credit!

Did you find this tip helpful?

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