Find it EZ Software Corp.

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About This Guide

This user guide is intended to supplement Find it EZwebsite resources (FAQ, Knowledge Base, Video Tutorials, and Corporate Documents) by providing step-by-step procedures to help you make the most of your Find it EZ product.

If we can improve this reference in any way, please feel free to send us your feedback. See "Send Feedback" on page 319.

Visit **https://www.finditez.com/support/#overview** for Find it EZwebsite resources.

This guide uses the following document conventions:

Program windows or dialog box titles are shown in **BOLD**

Program menus are shown like this: *File -> Open*

Program buttons are shown like this: Cancel

Keyboard keys are shown like this: (**Enter**)

This is a hyperlink: **http://www.finditez.com/**

Note: This is a note.

Tip: This is a tip.

Alert: This is an alert.

Example: This is an example.

See Also:

- This is a cross-reference

About Find it EZ

Find it EZ Software Corp. is a global leader in developing and delivering productivity improvement tools for software developers. Our award winning software developer tools provide instant, comprehensive and pin-point accurate where-used results all in one place. These productivity tools offer a new solution for crystal reports designers, database developers and software vendors to better manage release changes through every phase, from more accurate estimating, to optimal design selection, rapid development, improved code quality for smoother end-user roll out and expedited critical production support.

Tools developed by Find it EZ Software Corp. support all major programming languages, reports and databases across an entire n-tier enterprise application with a single integrated package.

Productivity software tools with vendor certified support to search and document all major business intelligence reporting tools, underlying databases, programs, application logs, data files, office documents plus more for complete change impact analysis. Database developers can take advantage of a full software stack impact analysis tool that identifies all interrelated components whenever changes are planned or made in an underlying database.

By using our change impact analysis tools, software developers benefit from:

- Saving time and money by quickly searching all reports, application source code, and/or databases with just one integrated software tool.

- More accurate and efficient source code change management.

- Ability to determine the exact scope and impact of planned changes.

- Easily estimate the time required to complete a change and ensure better quality code releases.

- Effective Risk Management, Resource Management and Cost Management.

Installation, Activation, and Updates

This section describes the steps required to download, register, install, configure, update, and manage your Find it EZ license and to understand the benefits and limitations of product trials.

Download Find it EZ

1. Visit **https://www.finditez.com/members/#downloads.**
2. If you have not done so already, register for a free Find it EZ account.
3. Once logged in, click to view the **Software Downloads** tab.
4. Refer to the following documents to select the product that best meets your needs:

   a. **https://www.finditez.com/resellers/salesaids/FinditEZ_compare_editions.pdf**

   b. **https://www.finditez.com/resellers/salesaids/Product%20Selection.pdf**
5. Click on the (latest) **Version** hyperlink next to the **Product** you are interested in to begin downloading the corresponding product setup file.
6. Once the setup file has been successfully downloaded, double click or open the file to run the installation process on the target workstation(s).

> **See Also:**
>
> - "My Account" on page 262

Download Connectors

Source items that require a connector will appear with a small warning icon preceding the name. See example below:

> **Note:** Some connectors are required (e.g. '.net') but others are optional (depending on whether or not you want to search a particular document type that then needs a corresponding vendor supplied connector). After product install on first run configuration wizard for setting up your environment, if you select one or more source items that require connectors, the wizard will prompt you to auto-download and install them. If you do not do so, or later add a source item, you will note that it has a yellow alert triangle icon next to it in the left (**Source**) panel. If you attempt to include such a source item in a project, you will be prompted to auto download and install the required connector.

Click on the source item/warning to download the associated connector.

If you try to initiate a search that includes a selected source lacking a required connector, an error message will be generated. See example below:

From the Program:

> **Note:** Downloading and installing a connector will require local administrative rights on your system.

1. From the Find it EZ menu, select *Tools -> Download Connectors -> [Connector Name]* .

A **Download Connector** dialog will appear.

2. Where applicable, click on the Proxy Settings button. A **Proxy Settings** dialog will appear.

3. Enter your proxy credentials for the selected connector.

> **Note:** If you don't know your proxy credentials, please contact your network administrator.

4. When settings are complete, click on the OK button to save.

5. Click on the Download & Install button. The connector will begin downloading.

    a. Once downloaded, a Find it EZ**InstallShield Wizard** will appear.

    b. Click on the Next button.

    c. Read and follow the instructions provided.

    d. When complete, click on the Finish button.

On the Website:

1. Log in to your Find it EZ Member Account.

2. Click to select the **Software Downloads** tab. A list of product releases and optional connectors will appear.

Product	Version	Date	Notes	Specs	.net	HANA	Crystal Reports	DB2	Access	BI 4.1	XI 3.1	Git
		Download Release						**Download Connectors**				
Code Search Pro - Desktop 2017	17.1.2	2016-12-20	📄	⬇	4.5	1.00.097	13.0.17	10.5	2007			
Code Search Pro - Server 2017	17.1.2	2016-12-20	📄	⬇	4.5	1.00.097	13.0.17	10.5	2007			
Dev Surge 365 - Enterprise 2017	17.1.2	2016-12-20	📄	⬇	4.5	1.00.097	13.0.17	10.5	2007	14.1.7	12.7	2.7.1
Code Search Community	17.0.5	2016-09-28	📄	⬇	2.2							
Eclipse Plugin	1.1.6	2011-07-19		⬇								

3. Locate the product release for which you want to download a connector.

4. In the **Download Connectors** section of the table, click on the corresponding version number in the desired connector name column. A **Connector Details** dialog box will appear. See example below:

5. To download the selected version from the Find it EZ server, click on the [Download Now] button. OR,

6. Where applicable, to download the selected version directly from Microsoft (i.e. Access) or directly from SAP (i.e. Crystal Reports), click on the **directly from Microsoft** or **directly from SAP** link, respectively. See example above.

7. The connector will begin downloading.

   a. Once downloaded, a Find it EZ **InstallShield Wizard** will appear.

   b. Click on the [Next] button.

   c. Read and follow the instructions provided.

   d. When complete, click on the [Finish] button.

8. To close the **Connector Details** dialog box, click on the **Close** or [X] button.

View or Edit Proxy Settings

If your corporate network uses a proxy server firewall, you will need to configure settings within a running Find it EZ program to enable automated "check for updates on start-up" as well as automated download and install of optional connectors or upgrades. There are two ways you can enter these proxy settings. In both cases, the settings are saved between sessions. Note that saved passwords, if required for your proxy, are automatically encrypted for security.
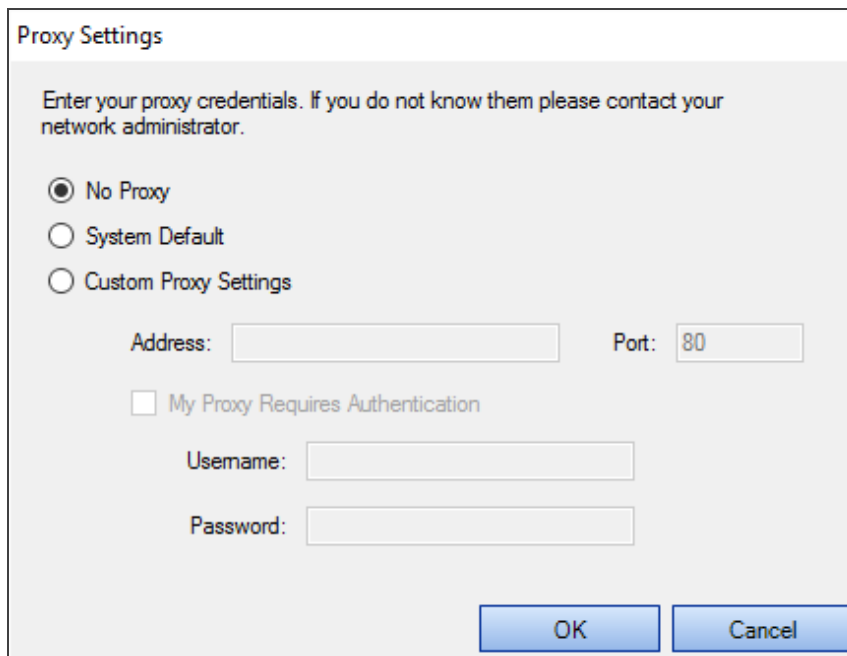
From the Program Main Menu:
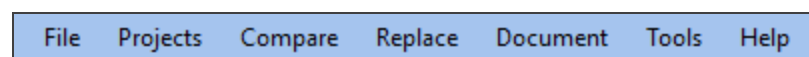
1. Select **Tools -> Proxy Settings** .

The **Proxy Settings** dialog box will appear, as below:

2. Choose and/or enter proxy settings, as required.

   Note: If you don't know your proxy settings, please contact your Network Administrator.

3. To save your changes and close the **Proxy Settings** dialog box, click on the OK button.

From any Download Dialog Window:

Download Connector

Connector: SAP Business Objects BI platform .NET Runtime

Latest Version: 14.1.7.1898

Last Updated: 2015-12-17   Not working? Download from our website

Note: Downloading and installing this connector will require local admin rights on your system.

[Proxy Settings]   [Download & Install]   [Close]
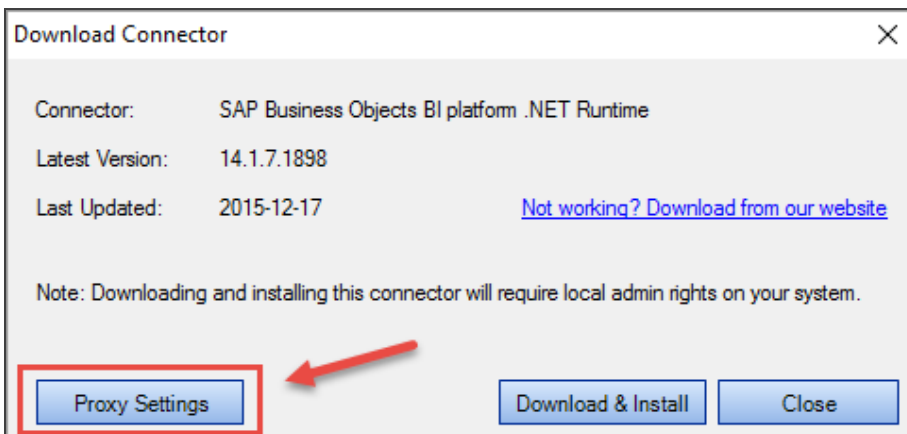
1. Before clicking on the `Download & Install` button, check your Proxy Settings.

2. Click on the `Proxy Settings` button. The **Proxy Settings** dialog box will appear.

Proxy Settings

Enter your proxy credentials. If you do not know them please contact your network administrator.

◉ No Proxy

○ System Default

○ Custom Proxy Settings

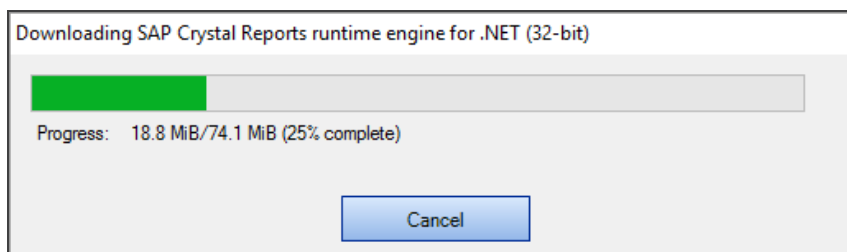Address: [   ]   Port: [80]

☐ My Proxy Requires Authentication

Username: [   ]

Password: [   ]

[OK]   [Cancel]
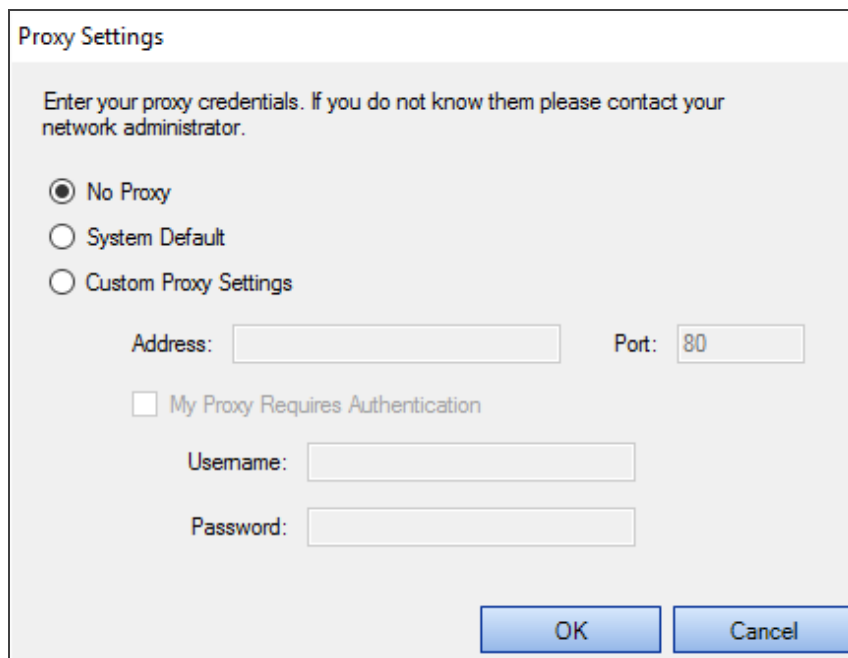
3. Choose and/or enter proxy settings, as required.

> **Note:** If you don't know your proxy settings, please contact your Network Administrator.

4. To save your changes and close the **Proxy Settings** dialog box, click on the `OK` button.

Installation and Configuration Wizard

Install Dev Surge 365 Enterprise

Once the setup file has been successfully downloaded:

1. Locate and double-click on the *.exe file in the lower, left of your desktop or in your Downloads folder. The **Preparing to Install...** dialog will appear, as below:
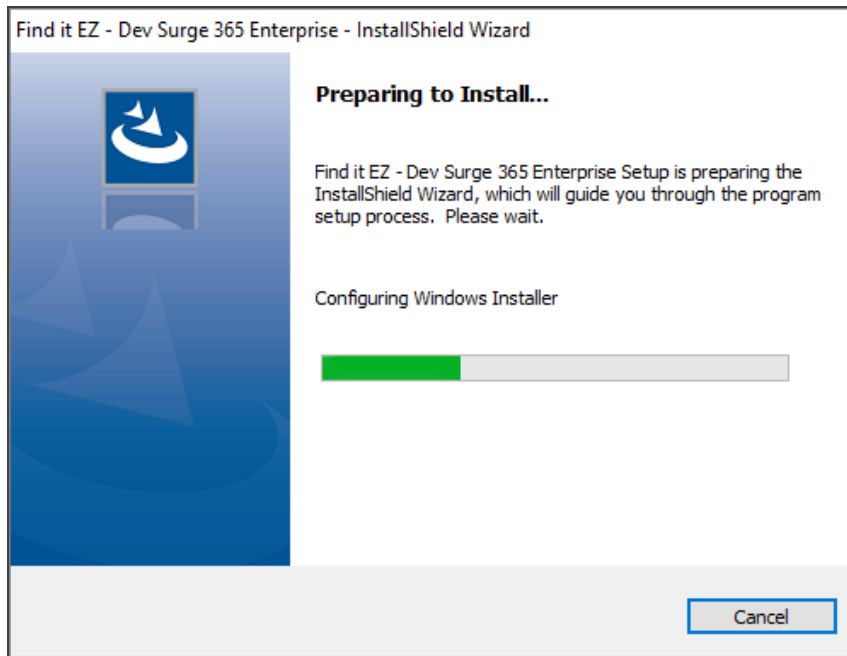
Once the preparation is complete, the following dialog will appear:
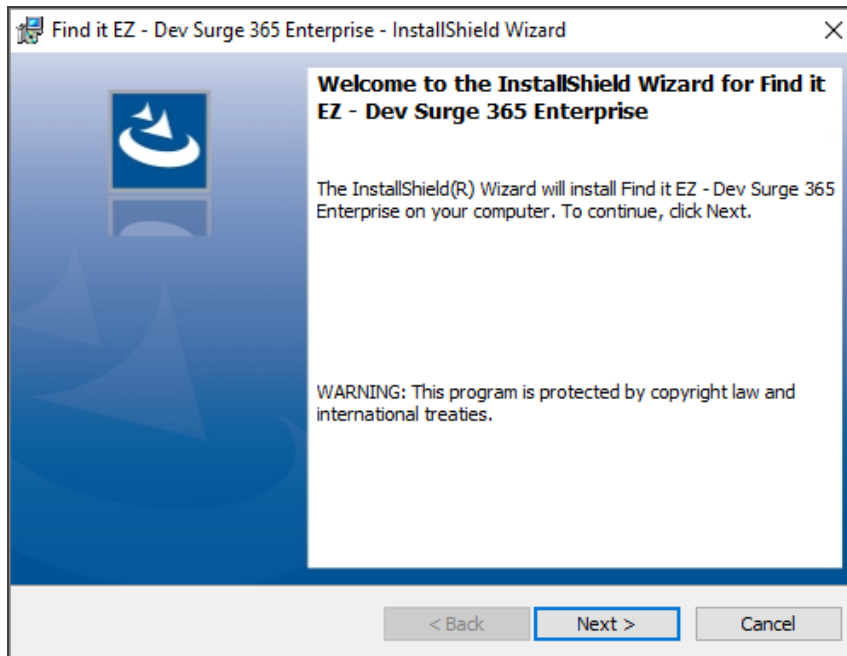
2. Click on the Next button to continue. The **License Agreement** dialog will appear, as below:
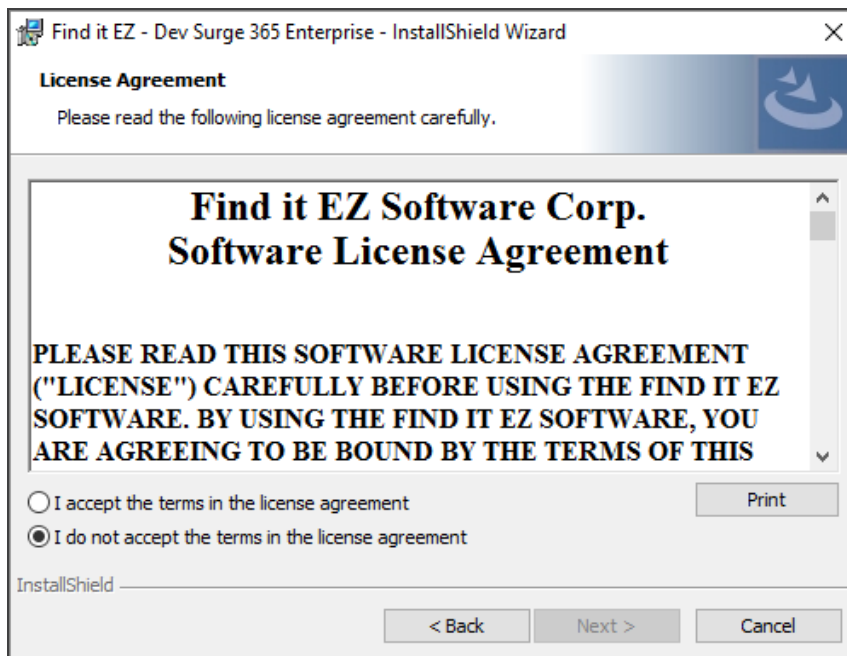
3. Read and accept the license agreement as follows:

    a. Use the vertical scroll bar to read the license agreement carefully and thoroughly.

    b. To print the license agreement, click on the Print button. A **Print** dialog will appear. Configure print settings as desired and click on the Print button.

    c. To accept the license agreement, click to choose the **I accept the terms in the license agreement** option.

4. Click on the Next button to continue. The **Destination Folder** dialog will appear, as below:
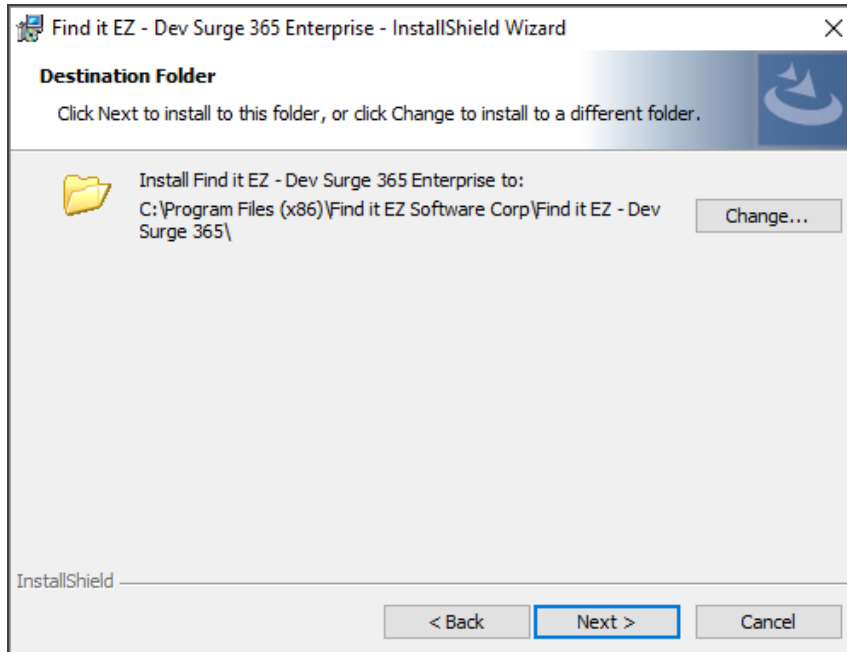
a. To change the destination folder, click on the Change... button. The following dialog will appear:
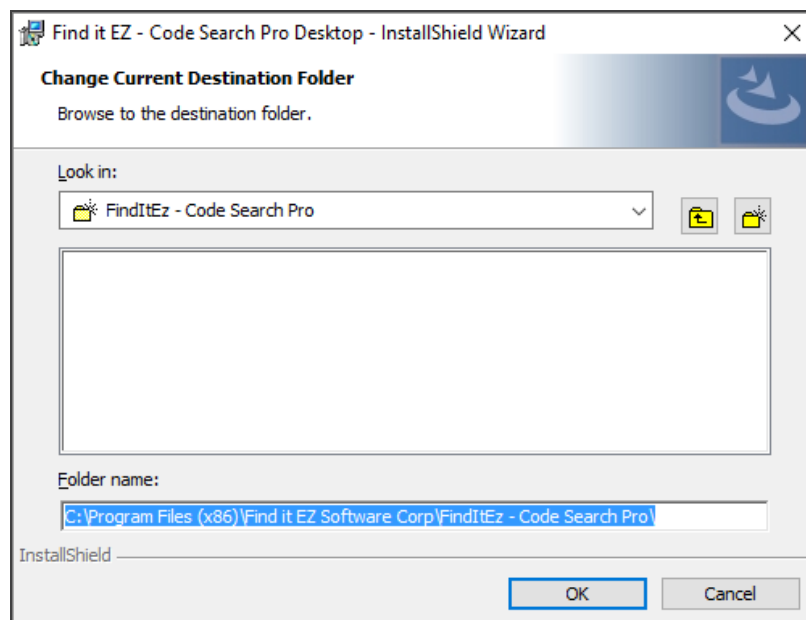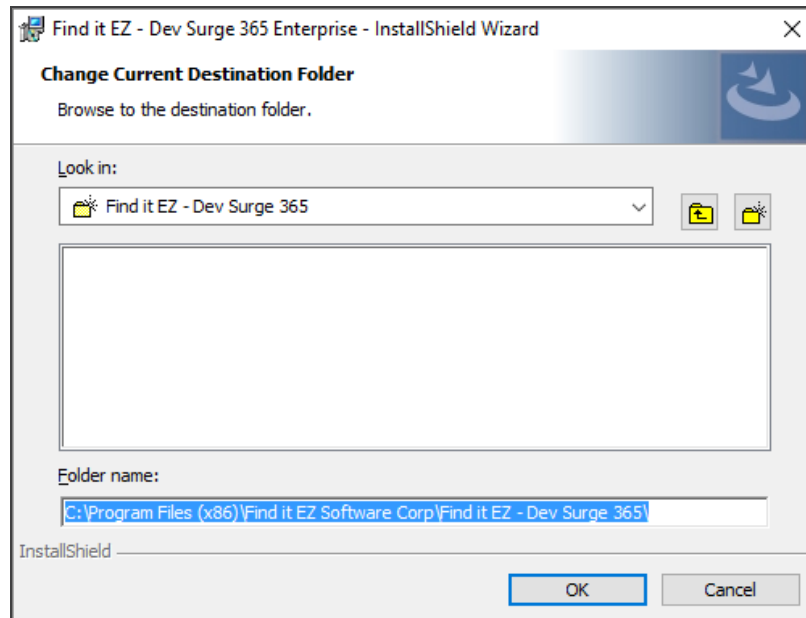
b. Make changes, as desired, and click on the OK button to close the dialog.

5. Click on the Next button to continue. The **Custom Setup** dialog will appear, as below:
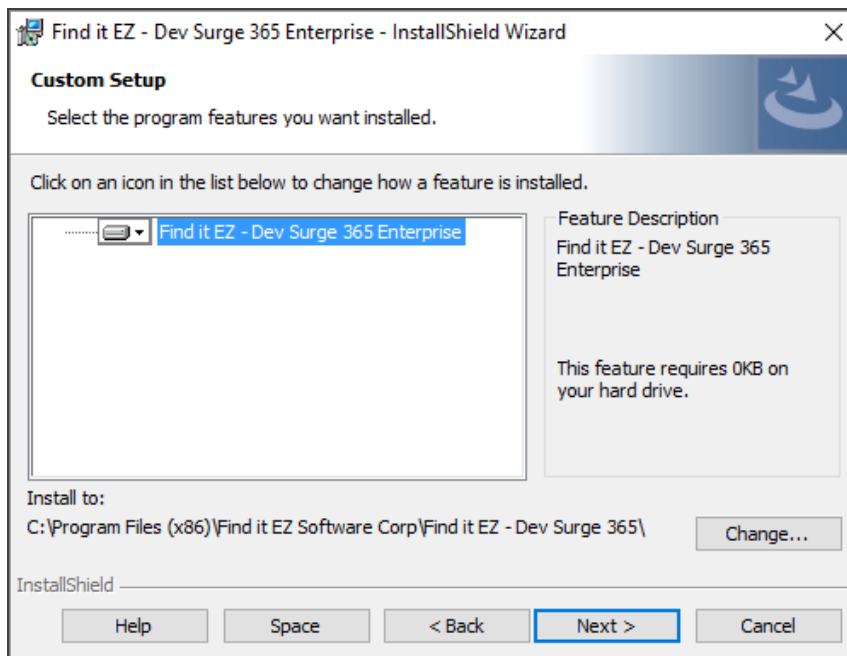
a.   To change how a feature is installed or to exclude a feature, click on the icon preceding the feature name and select the desired option from the context menu. For more information, click on the Help button. See below:
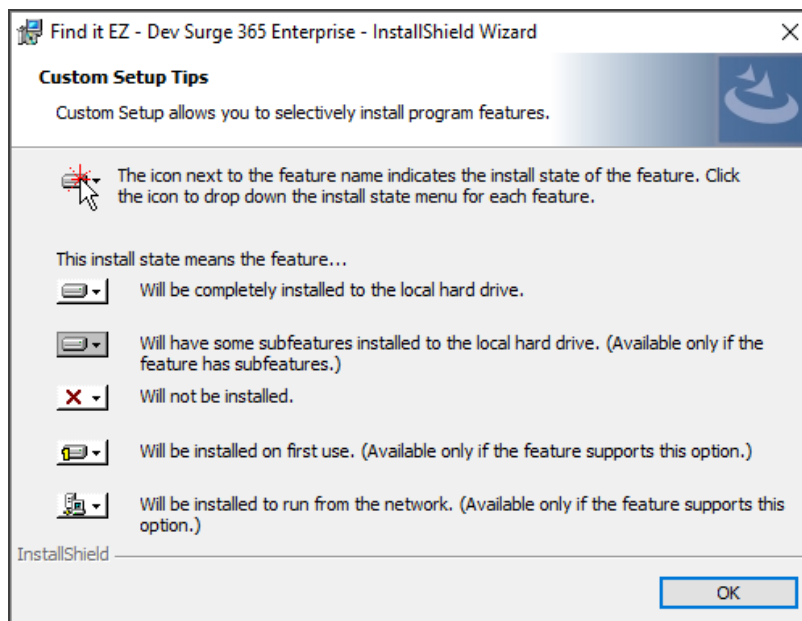
b.   To close the **Custom Setup Tips** dialog, click on the OK button.

c.   To view available disk space, click on the Space button. The **Disk Space Requirements** dialog will appear, as

below:
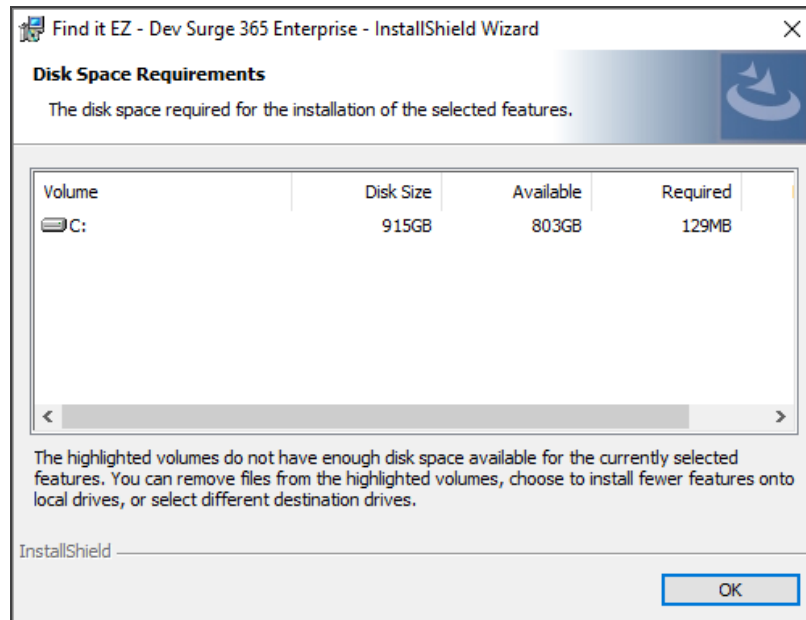
d. To close the **Disk Space Requirements** dialog, click on the OK button.

6. Click on the Next button to continue. The installation will begin and the following dialog will appear:
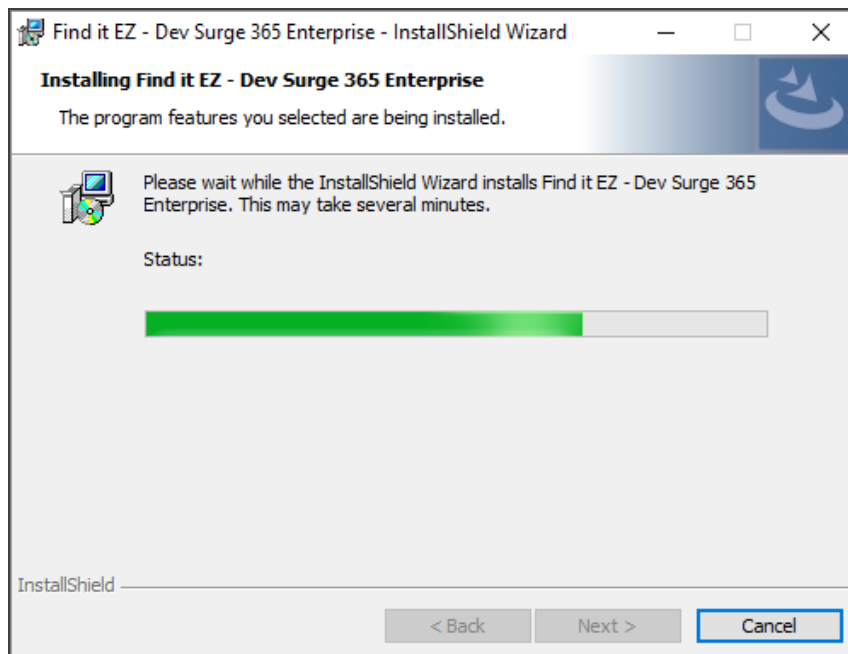
7. Once complete, click on the Next button to continue. The following dialog will appear:
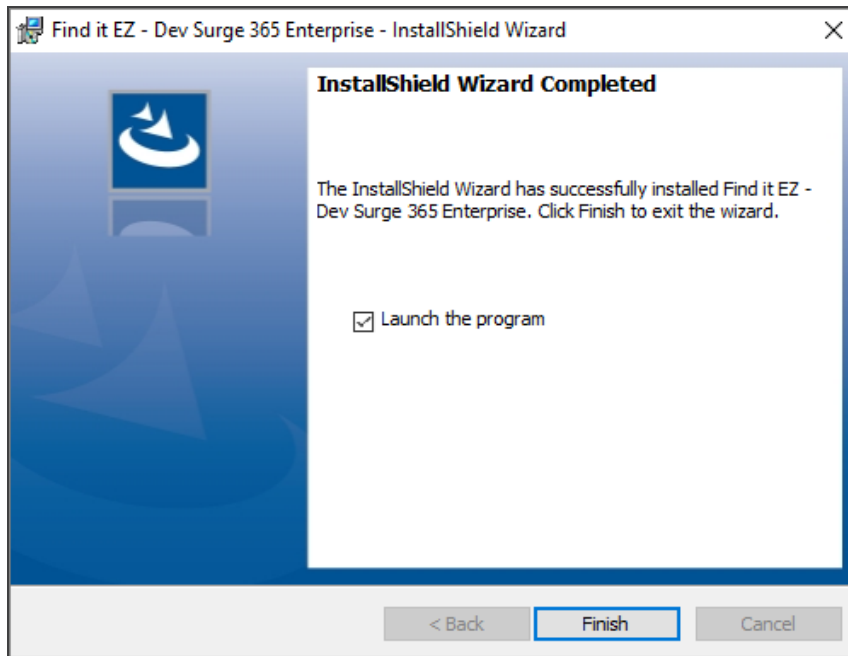
To launch the program after installation, click to select **Launch the program** (selected by default).

8. To complete the installation, click on the Finish button. If selected, the program will launch.

Custom Configuration

After you download and install Find it EZ and run it for the first time, a **Configuration Wizard** opens to walk you through the initial setup and configuration process. This wizard can also be run at any time from the *Tools -> Configuration Wizard* menu, as below:
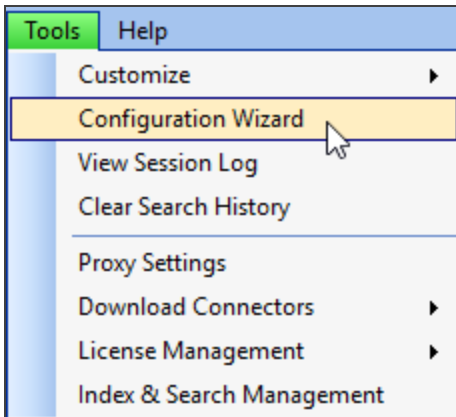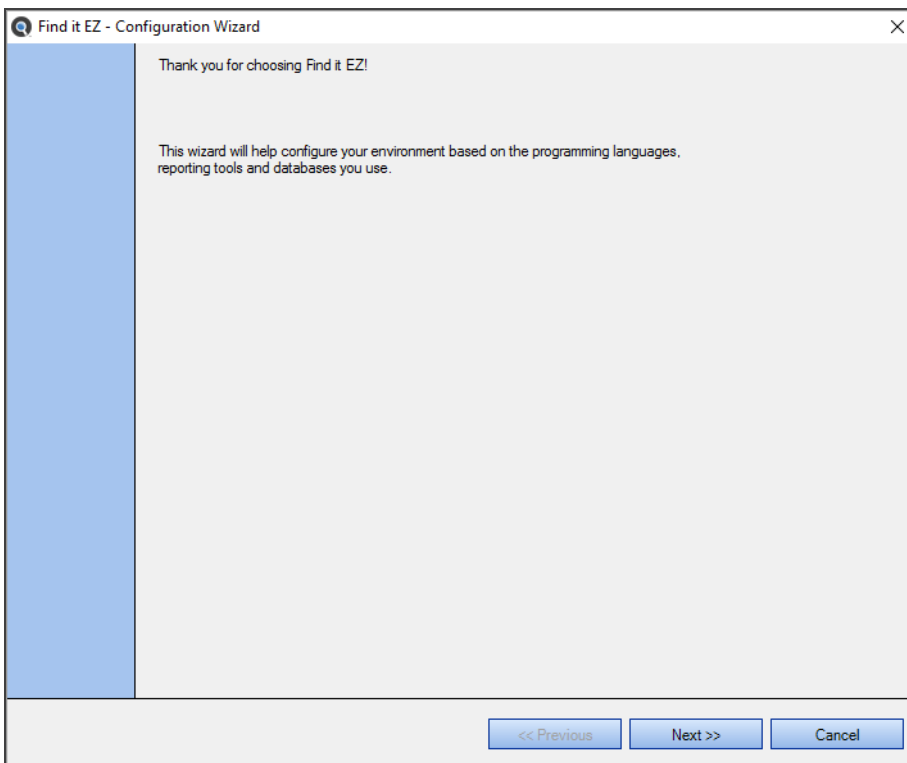
1. Click on the Next >> button to continue through the steps (click on the <<Previous button to go back at any point during the wizard).

2. Once complete, click on the OK button to save all changes and close the **Configuration Wizard**.

3. To exit and discard all changes at any point during the wizard, click on the Cancel button. This will apply and use your existing configuration settings.

See Also:

- "Download Find it EZ" on page 3
- "Configuration Wizard" on page 54
- "License Manager" below

License Manager

License manager is a product license authorization check on start-up (e.g. a trial period or SaaS annual renewal period check to see if it is valid before running the program). The license manager has to be running (as a Windows Service).

Note: The license manager runs within (behind) the firewall so is secure and US Health Insurance Portability & Accountability Act (HIPAA) compliant.

During install, a warning that it is going to be listening on a TCP/IP port may be issued by Windows during setup.

If the service is not running or does not start automatically (by default), or the license manager can not be contacted due to firewall restrictions on your network, you will receive an "Unable to connect to the license manager..." dialog preventing the Find it EZ program from running.
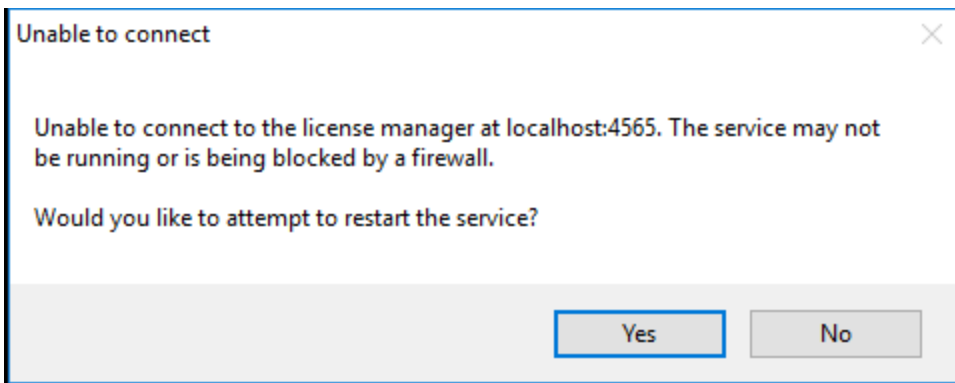
If you receive this alert, try the following solutions to resolve this issue:

1. Click on the Yes button on the message to try restarting the service.

2. Use the Windows Task Manager to attempt to restart the Find it EZ license manager services.

3. Download and/or re-install the software.

4. If none of the above work, contact your local technical support or contact Find it EZ support and provide log files using the *Help -> Send Logs to Support* menu.

> **See Also:**
> - "Serial Numbers" on page 285
> - "Installation and Configuration Wizard" on page 10

Activate License

To activate your license:

1. Once the product is downloaded and installed, launch the program. The **Activate** dialog box will appear, as below:

2. Enter your account **Email Address**, **First/Last Name**, and product **Serial Number**.

> **Note:** To find your serial number, click on the Lookup Serial Number button. The member website will open in a browser window. Log in and the **Serial Numbers** tab will open. Locate and copy the product serial number.

3. Click on the Activate button. If successful (see message below), the program will be activated for use.

Thank you for activating. Your application will now be re-started to fully unlock its functionality

OK

To close the message, click on the OK button.

Note: If you receive an error message (e.g. "Entered information is incorrect. Please check the serial number and try again"), try again. Ensure there are no extra characters or spaces in the serial number. If you feel you are receiving this message in error and continue to experience difficulty attempting to activate your product, please contact **support@finditez.com** .

See Also:

- "Enter New Serial Number" on page 287
- "View or Transfer Current License" on page 285
- "Download Find it EZ" on page 3
- "Download Release Version" on page 273
- "Get a New Trial License" on page 288

Activate License Manually

If you have a corporate security policy that does not allow the workstation on which you are installing Find it EZ to be connected directly to the Internet, use manual activation.

This is quite common in large corporations where outbound internet connections are locked down (on certain ports) or not available to go to a given website domain, etc. For example, our automated activation system is a web service on domain activation.finditez.com . A corporate security policy may prevent an application from attempting to "call out," or may not allow a connection to this specific domain name. However, they could often still use a web browser to go to our website on **www.finditez.com** as the policy typically allows this normal internet access activity.

In cases where no Internet access is allowed even from a web browser, the end user would have to find a workstation (home computer other office computer that is permitted web browsing) from where they can perform the manual activation by sending the long codes back and forth between computers as within an email for example.
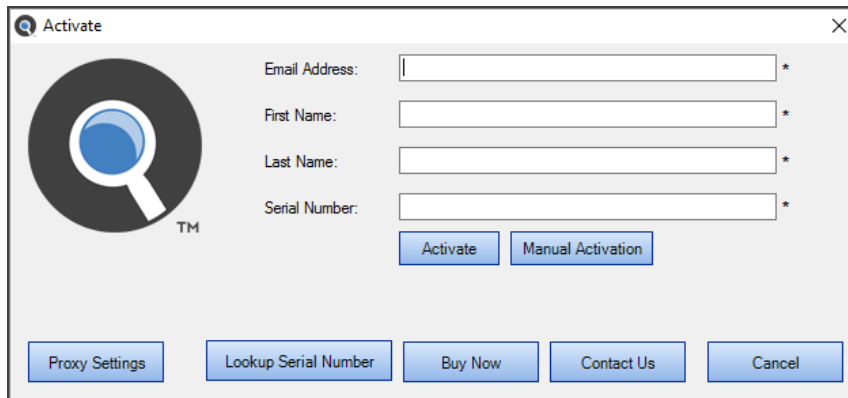
Note: Pending receipt of payment, manually activated licenses will automatically expire within 30 days. Once expired, manual activation will be required upon receipt of payment.

Note: Upon receipt of payment, manually activated licenses will automatically expire at the end of each software assurance period. Once expired, manual activation will be required upon each renewal.
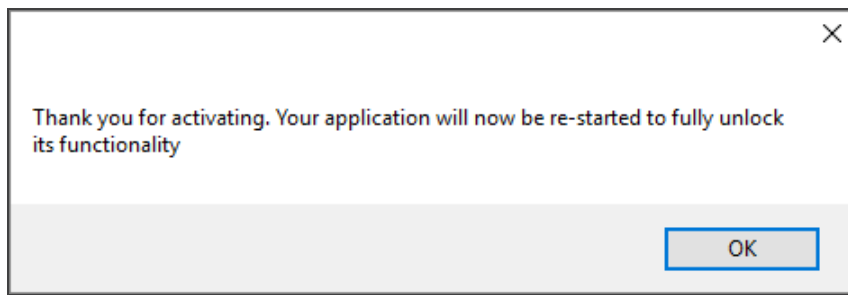
From the Program:

1. Once the product is downloaded and installed, launch the program. The **Activate** dialog box will appear.
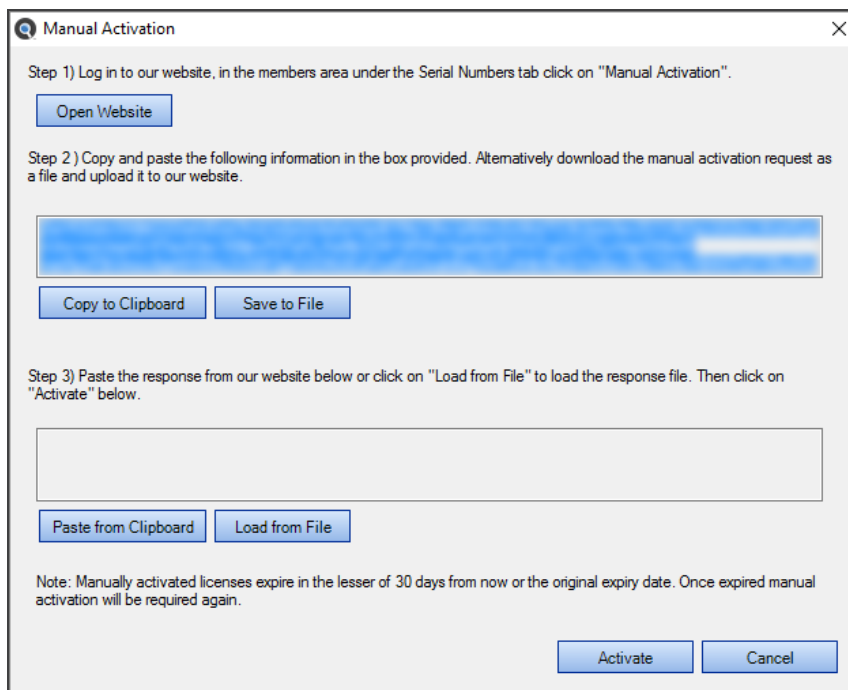
   Note: You can also access the **Activate** dialog box from the menu; select *Tools -> License Management -> Enter New Serial Number* .

2. Enter your account **Email Address**, **First/Last Name**, and product **Serial Number**.

   Note: To find your serial number, click on the Lookup Serial Number button. The member website will open in a browser window. Log in and the **Serial Numbers** tab will open. Locate and copy the product serial number.

3. Click on the Manual Activation button. The **Manual Activation** dialog box will appear, as below:

4. Follow the instructions in Step 2); copy and paste the information in the box provided by clicking on the **Copy to Clipboard** button. Alternatively, download the manual activation request as a file by clicking on the Save to File button.

5. In Step 1), click on the Open Website button.

---
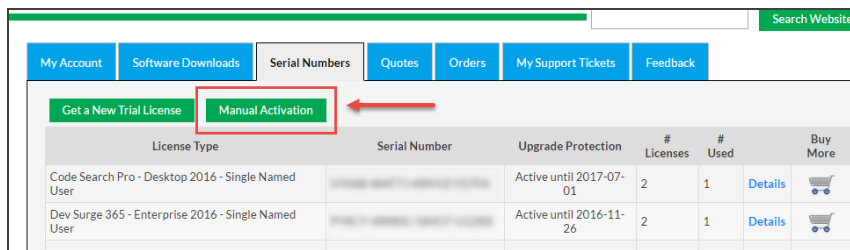
a. Log in to the member website.

b. Click on the **Serial Numbers** tab.

c. Click on the Manual Activation button. The **Manual Activation** dialog box will appear, as below:

d. Paste your manual activation code in the box provided. Or, click on the Choose File button to load it from a file (if you saved it in step 4 above).

e. Click on the Next button. A response file will be generated. See example below:

f. Copy the provided code or click on the Download button to download the response file.

g. Return to the Find it EZ program.
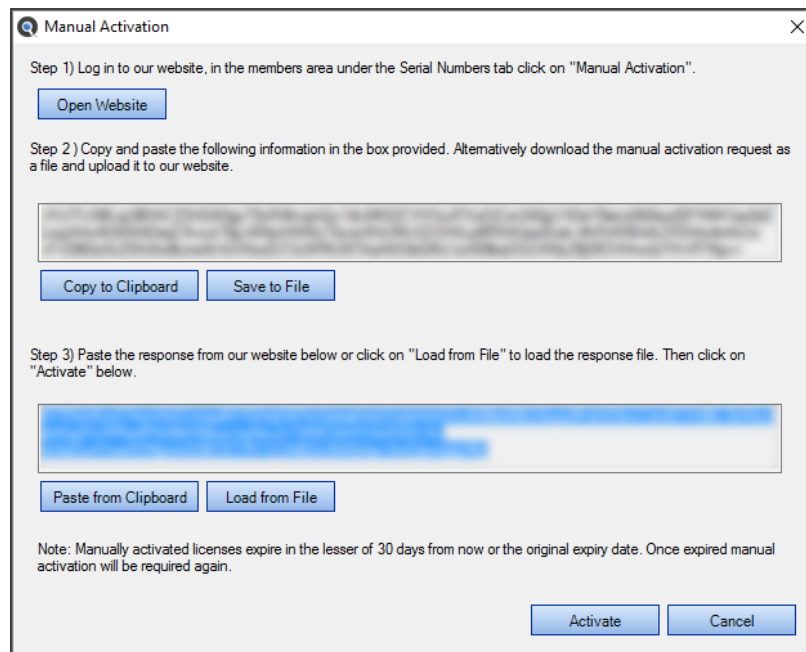
6. Paste the response from our website into the Step 3) box provided by clicking on the Paste from Clipboard button. Or, click on the Load from File button to load the saved response file.

7. Once complete, click on the Activate button. The program will be activated for use.
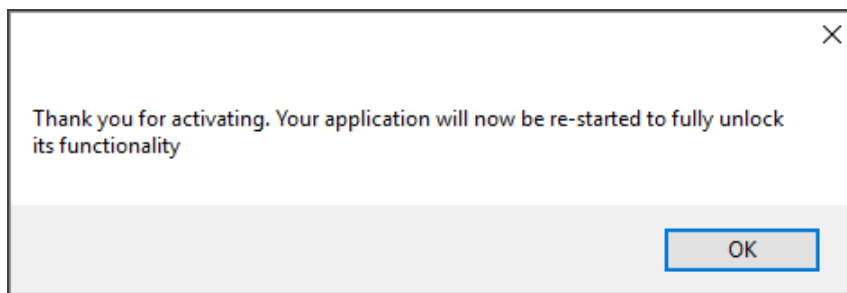
Product Trials and Limits

Product trails are subject to the following limitations:

- Time limited
- Features (# of documents processed and contained in exported reports or conversion wizards) capped
- Ability to create projects is restricted
- Number of trial licenses issued per customer capped (by unique company email domain)

All above get auto-reset whenever we release a new minor or major build. Release numbering is : major.minor.build. Customers can request a new trial whenever we announce / post a new major or minor release after their past trial with an earlier version has expired.

While in trial mode, creating projects is restricted:

- Code Search Pro (Desktop & Server): you can only create one additional project; just the single "Default" project plus one custom user-defined project is allowed.

- Dev Surge 365: you can create only one additional (i.e. a maximum of 2) projects. This is required to permit easier evaluation of the "Compare" wizard (i.e. compare the default project to a "new" second project).

- The Default project can not be deleted. However, the one additional project permitted in a Dev Surge 365 trial could be deleted if desired to test this feature.

- Users also have full access to document filtering and managing their index so that they can bring in and check functionality against various subsets of documents.

Number of licenses per customer:

- Equal to the number of registered login accounts linked to the customer account (+ 1 when the trial key is requested).

- A customer (user) can request a trial for each product edition. They are separate, unique keys and trials.

- We can, at our discretion, grant extensions or additional trial licenses upon request.

- Feature limits are indicated in the table below.

Number of documents processed feature limits in trial mode:

	Report Wizards Output	Change Report Connections	Change BOE Schedules Authentication
Code Search Pro Desktop	50	50	
Code Search Pro Server	100	100	
Dev Surge 365 Enterprise	100	100	100

> **Note:** Both in trial and fully unlocked mode, all products allow indexing, searching and comparing (Dev Surge 365 feature only), an unlimited number of database objects, reports, programming source code, data and log files or office documents.

The product trial time limits are:

- Code Search Pro Desktop: 15 days

- Code Search Pro Server: 30 days

- Dev Surge 365 Enterprise: 30 days

Check for Updates

From the Program:

On start-up, an updates available check is performed provided:

A. You are connected to the Internet, and your firewall is not preventing traffic to our web service on https://activation.finditez.net.

B. Your account profile is not set to skip the updates available check. Note, this setting may be used by and administrator to prevent all end-users from receiving this message and attempting to upgrade independently rather then by a more controlled corporate roll-out.

> **Note:** If your system is connected to the Internet on start-up of Find it EZ, by default you will automatically receive this **Update Available** notice. This on-start-up check can be disabled for all Find it EZ users in your company by logging into your online company profile and disabling this default setting at any time. This will affect all users linked to the company profile. See below:

Alternatively, you may disable on start-up checks for your individual workstation by changing your custom profile using the *Tools -> Customize -> User Options* menu.

1. From the Find it EZ menu, select *Help -> Check for Updates* .

2. If no updates are available, you will receive a message that reads "No updates available at this time." To close this message, click on the OK button.

3. If updates are available, an **Update Available** pop-up will appear as in the example below:

4. Use the vertical scroll bar to view all release notes.

5. To download and install the update, click on the Download & Install button. A **Download Update** pop-up will appear.
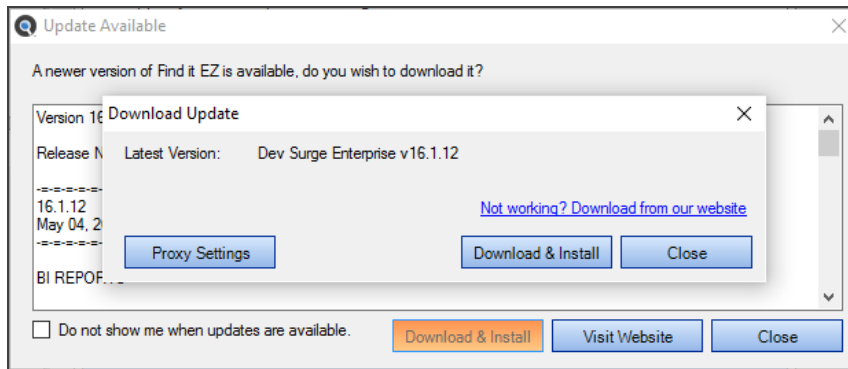
a. To enter proxy settings, click on the Proxy Settings button.

b. To download and install the update, click on the Download & Install button. The download will begin.

    i. Once completed, the **InstallShield Wizard** will appear to walk you through the installation process.

    ii. Follow the screen instructions and click on the Next button to proceed through the steps.

On the Website:

1. Log in to your Find it EZ Member Account. Click on the **Software Downloads** tab.

2. Launch Find it EZ; from the main menu, select ***Help -> About*** .
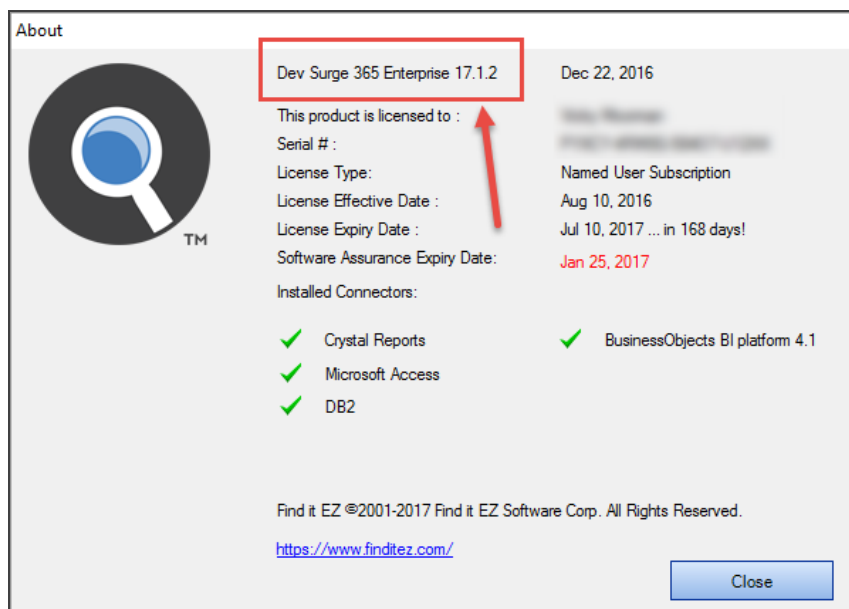
3. Compare the latest posted release number under the **Version** column (on the website) corresponding to your product edition (on the **About** dialog). If the version posted on the website is newer, an update is available.

> **Note:** Provided your software assurance plan is active, you may download and install the latest upgrade for free.

Via Email from Find it EZ Software Corp.:

All users on an active software assurance plan will receive email notification of new (optional / recommended / required) upgrades, releases, updates, patches, and offers.

> **Note:** You may disable automatic notifications by logging into your profile and changing your email notice preferences (as above), or by clicking on the "unsubscribe" hyperlink on any update notice received.

> **Note:** If your support plan has lapsed or you have not yet decided, you may request a free trial key to see what's new.

Index Reset on Upgrades

After upgrading to a newer version of the application where there is an a index structure change or model change, you will see the following message:
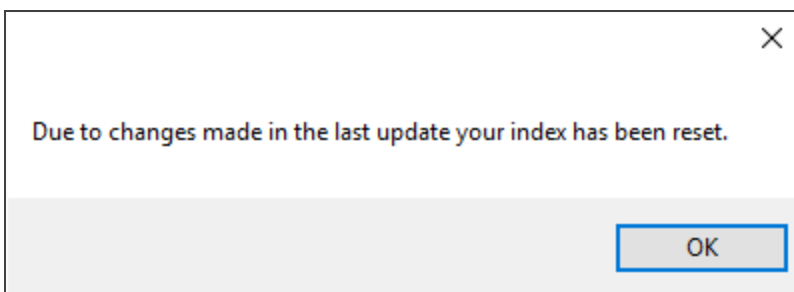
In these circumstances, the index needed to be cleared in order to make the new information available.

To clear this message, click on the OK button.

Product Overview

This section provides an introduction to Find it EZ user interface layout, navigation methods, customization options, and *File* menu options.

User Interface Layout

Refer to the image and table below for a description of the key components of the Find it EZuser interface:

#	Name	Description
1	Menu	Click on a menu item to view and navigate projects and settings, initiate a task, export or print results, access user options, reports, help, and more.
2	Search	Quickly initiate a search.
3	Source	This panel allows you to select and configure settings for the source files (File Locations, Databases, BI Reports, Programs, and Documents) within which you want to search. Show or hide the panel by using the ⟨⟨ and ⟩⟩ buttons. Expand or collapse a source category by using the ▲ or ▼ buttons (note that a category cannot be collapsed if an item has been selected). In the desired category, click to check the desired source items. To select all items in a category, click to check the uppermost check-box located in the category header.
4	Options	Show or hide the panel by using the ⟨⟨ and ⟩⟩ buttons. Click to choose a **Search Type** and check the desired **Content Filters** to apply to the search.

#	Name	Description
5	Results	Once a search is complete, results can be viewed or edited via this window. Select a tab to view **Results**, **Statistics**, and **Errors**.
6	Details	When a result is selected in the **Results** window, details will appear in this window.

See Also:

- "Wizards Overview" on page 68
- "Perform a Regular Search" on page 109
- "Use the Expression Builder" on page 115
- "Work With Search Results" on page 171
- "View Search Result Details" on page 185

Navigation

Navigation in Find it EZ is accomplished in two main ways:

1. By using the **Wizards** (for new users).

   Note: Many of the items included in the **Wizards** can also be accessed directly via the main menu. Refer to the table below.

2. By performing a **Regular Search** from the main screen (for intermediate or advanced users).

Navigation

Wizard Option	Menu Navigation	Sample Documents
Search for a specific database object, code snippet, or a variable to find any references throughout all of my source code (including within reports and databases)	See links at end of topic.	**List XLSX** **List HTML** **Detail XLSX** **Detail HTML**
Compare database schema, reports or files for differences between versions	*Compare -> Documents, Reports & Databases*	**List XLSX** **Detail HTML** **Detail XLSX**
Extract database objects (tables, stored procedures, views, etc.) used in my reports	*Document -> Business Intelligence -> Database Cross-Reference*	**XLSX**

Wizard Option	Menu Navigation	Sample Documents
Generate detailed content documentation for my reports	*Document -> Business Intelligence -> Report Definition*	**HTML** **TXT**
Extract all SQL code used in my reports	*Document -> Business Intelligence -> Show SQL Queries*	**HTML** **TXT**
Create a database column cross-reference for my reports	*Document -> Business Intelligence -> Column Cross-Reference*	**XLSX**
List all my reports, including printer and update information	*Document -> Business Intelligence -> Report Listing*	**XLSX**
List the schedule for my reports inside an SAP BOE or Crystal Server repository	*Document -> SAP BOE / Crystal Server -> Report Schedules*	**XLSX**
List the security for my reports inside an SAP BOE or Crystal Server repository	*Document -> SAP BOE / Crystal Server -> Security Listing*	**XLSX**
List the schedule for my reports inside a SQL Server Reporting Services (SSRS) database	*Document -> SQL Reporting Services -> Report Schedules*	**XLSX**
Replace Crystal Report data source connections or qualified table names	*Replace -> Crystal Reports -> Data source connections or qualified table names*	
Replace the username, password, server or database of my Reports in an SAP BOE or Crystal Server repository	*Replace -> Crystal Reports -> BOE BI Database logon information*	

See Also:

- "Perform a Regular Search" on page 109
- "Launch the Wizards" on page 68
- "Use the Expression Builder" on page 115

Customize View
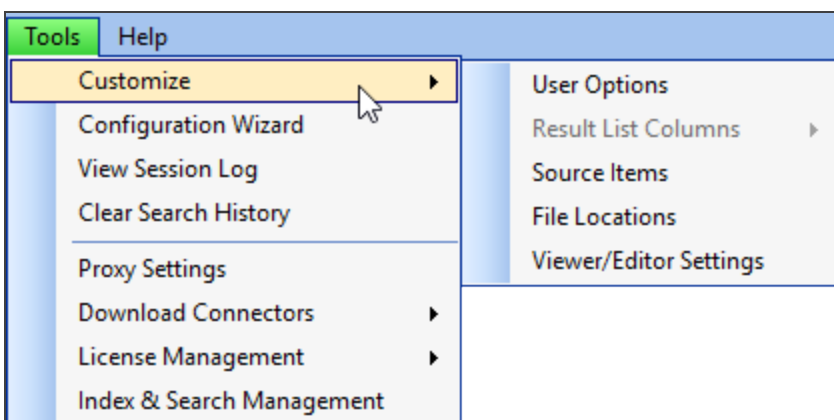
The view of the main Find it EZ screen can be customized as follows:

- To show or hide the **Source** or **Options** panels, see "Product Overview" on page 28
- To expand or collapse **Source** items, see "Product Overview" on page 28
- To add or remove **Source** items, see "Show or Hide Source Items" on page 49
- To add or remove repositories, see "Show or Hide File Locations (Repositories)" on page 51
- To show or hide **Project Settings** each time you select a source item, see "File Locations and Source Settings" on page 129
- To configure source category and source item viewer/editor, see "Viewer / Editor Settings" on page 52
- To customize **Results** list columns, see "Show or Hide Result List Columns" on page 49
- To show the **Search Wizard** on start-up, see "Show Wizards on Start-up" on page 73

File Menu Options

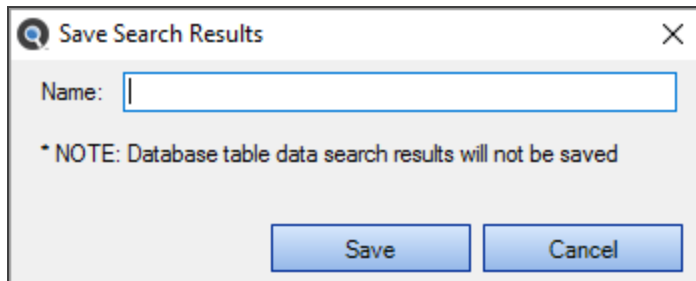This section describes the various options available via the *File* menu. Follow the steps to save or open saved search results, save project settings, export or print search results, and to exit Find it EZ.

Save Search Results

1. Perform a search.
2. From the Find it EZ menu, select *File -> Save* .
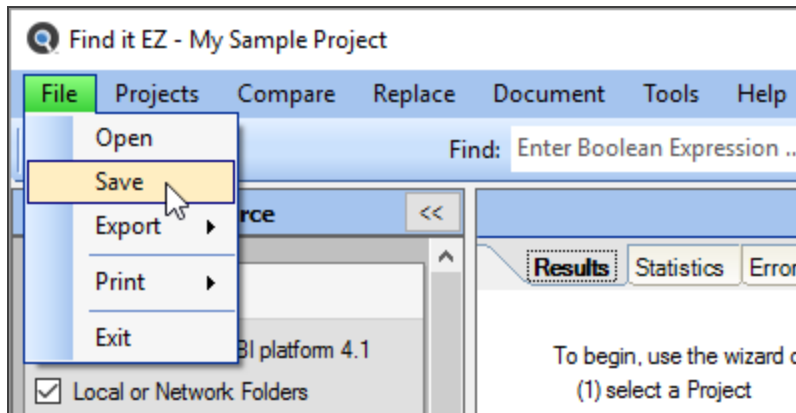
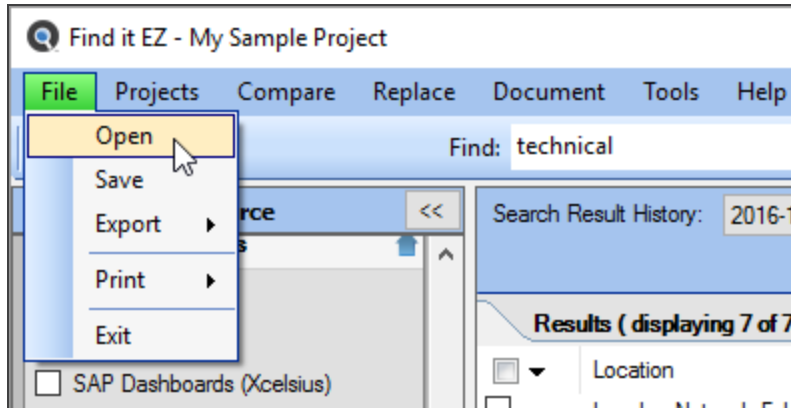3. A **Save Search Results** dialog box will appear, as below:

4. In the **Name** text box, enter a descriptive name for the results.

5. Click on the Save button.

> **Note:** Once you save search results, every subsequent change to the search results elements are automatically re-saved. Also, If any search results have annotations or have been marked complete and you attempt the exit/close the program without first saving your results, you will be prompted to save your search results, continue without saving, or keep the program open.

Open Saved Search Results

1. From the Find it EZ menu, select **File -> Open**.

2. An **Open Search Results** dialog box will appear.
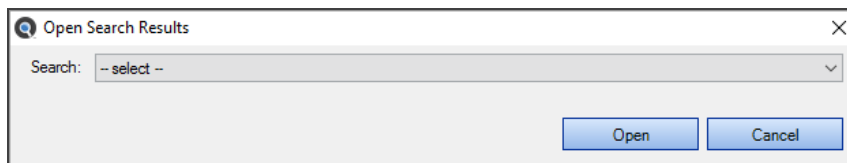
3. From the **Search** drop-down list, select the name of the saved search results.

> **Note:** Once saved results are opened, all further changes to them are automatically saved (this is reset when you exit the program OR if you run another search to replace the "SAVED / re-Opened" search results that you had been working with. Also, when you open a previously saved search result, this also auto-switches to the saved Project settings. The saved results listed include the following identifiers: Date, Time, [File] Name, Project Name, Search Type, and Search text.

4. Click on the Open button. The selected search results will appear in the **Results** window.

See Also:

- "Wizards Overview" on page 68
- "Perform a Regular Search" on page 109
- "Add or Edit Annotations" on page 193
- "Mark Item(s) Complete or Incomplete" on page 189

Save Project Settings

If you have only one project (the Default project) and can have more than one project, you will be prompted to save your current settings as a New Project upon closing the program. Click on the OK button to save your settings.

See Also:
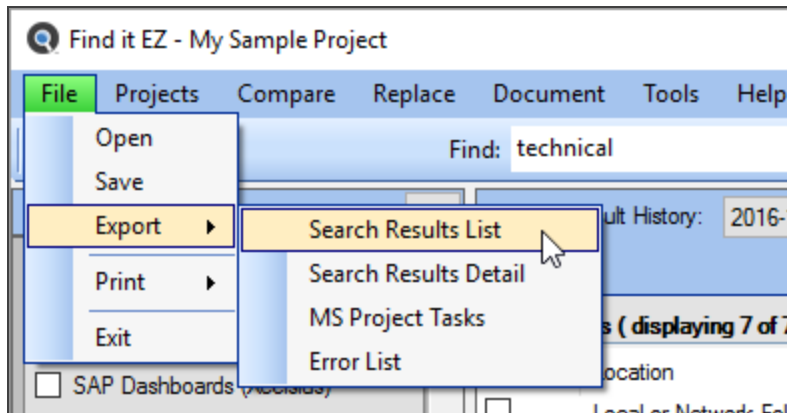
- "Product Trials and Limits" on page 23

Export Results

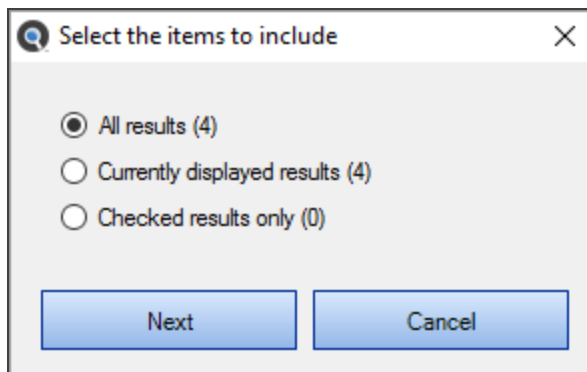Follow these instructions to export search results/result details, MS Project tasks, or an error list.

Export Search Results List

An exported search results list will create a spreadsheet containing all or a subset of your search results. This saved .xslx file can then be redistributed, changed, or printed using your default spreadsheet editor (e.g. Excel).
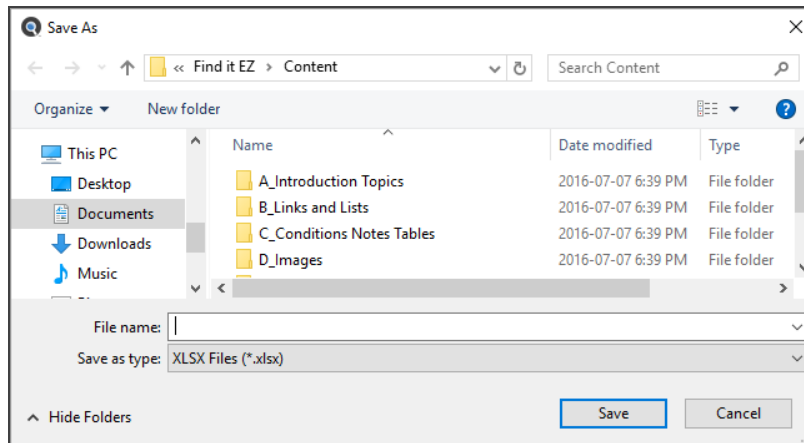
1. Open a previously saved search result using the `File -> Open` menu or perform a search.

2. From the Find it EZ menu, select `File -> Export -> Search Results List` .

3. A **Select the items to include** pop-up will appear.

a. Click to choose one of the options; **All results**, **Currently displayed results**, or **Checked results only**.

b. Click on the Next button. A **Save As** dialog box will appear.

i. Navigate to the destination folder.

ii. Enter the desired **File name**.

iii. Click on the Save button.

c. A **Save Complete** pop-up will appear (see below).

i. To view the saved file, click on the View Now button. The file will open in the selected viewer (see below).
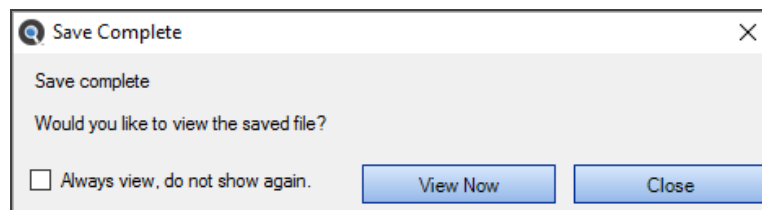
Tip: Click to check the **Always view, do not show again** check-box to always view the saved results file.

ii. To close the **Save Complete** pop-up, click on the Close button.

4. Exported search results will contain the following data columns:

- Source **Location**
- File **Type**
- **Host** Name
- **File Path or Database**
- **Document** Name
- Number of **Matches**
- **Annotations**

Export Search Result Details

An exported search results details will create a spreadsheet containing all or a subset of your search results. This saved .xslx file can then be redistributed, changed, or printed using your default spreadsheet editor (e.g. Excel).
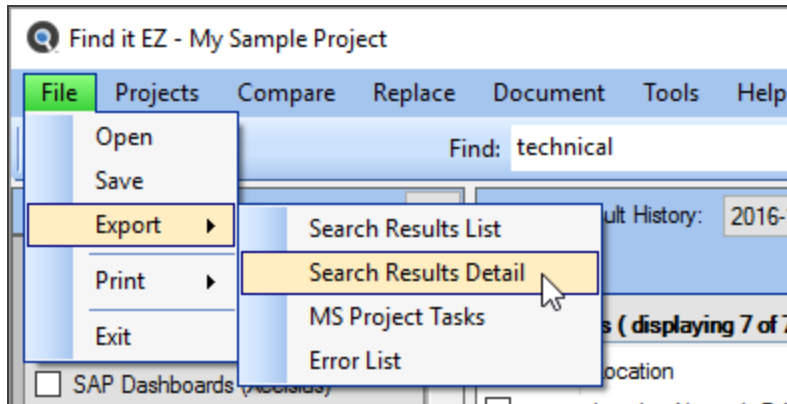
1. Open a previously saved search result using the **File -> Open** menu or perform a search.

2. To export selected details only:

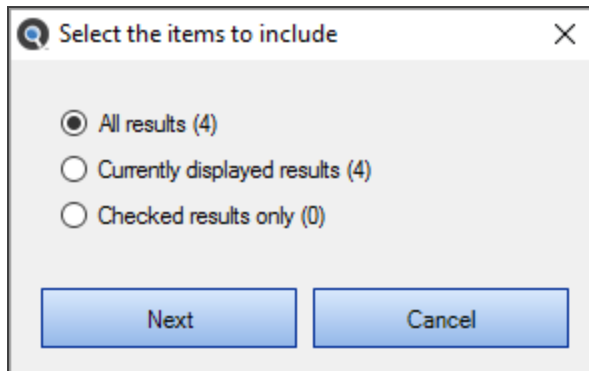   In the **Results** window, click on a result row. Details will appear in the **Details** window.
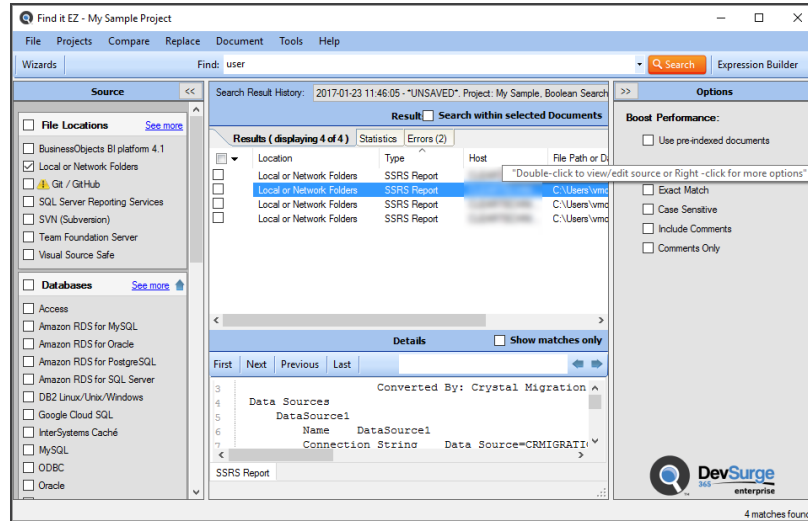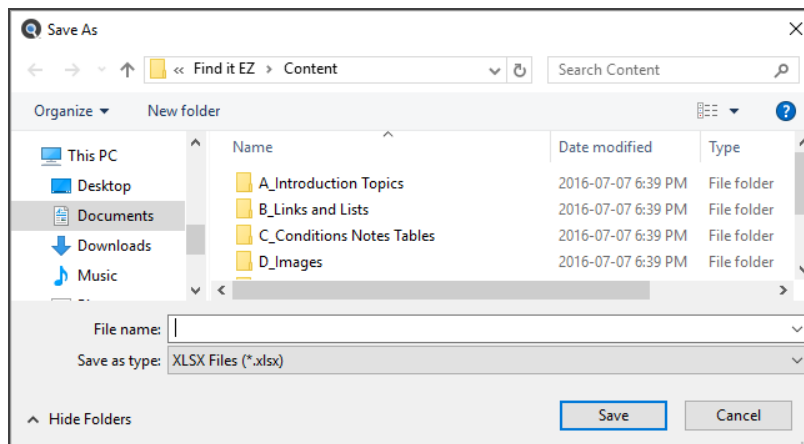

   a.

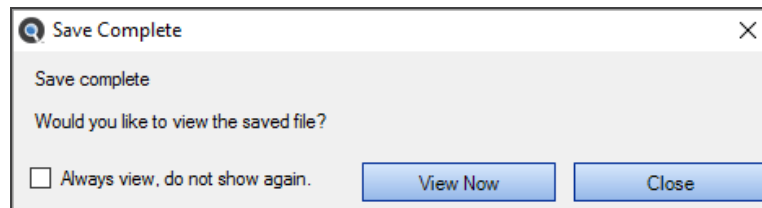3. From the Find it EZ menu, select **File -> Export -> Search Results Detail** .

4. A **Select the items to include** pop-up will appear.

a. Click to choose one of the options; **All results**, **Currently displayed results**, or **Checked results only**.

b. Click on the Next button. A **Save As** dialog box will appear.

    i. Navigate to the destination folder.

    ii. Enter the desired **File name**.

    iii. Click on the Save button.

c. A **Save Complete** pop-up will appear.

    i. To view the saved file, click on the View Now button. The file will open in the selected viewer (see below).

Tip: Click to check the **Always view, do not show again** check-box to always view the saved results file.

    ii. To close the **Save Complete** pop-up, click on the Close button.

5. Exported search results detail will contain the following data columns:
   - Source **Location**
   - File **Type**
   - **Host** Name
   - **File Path or Database**
   - **Document** Name
   - **Section**
   - **Search Terms Matched**
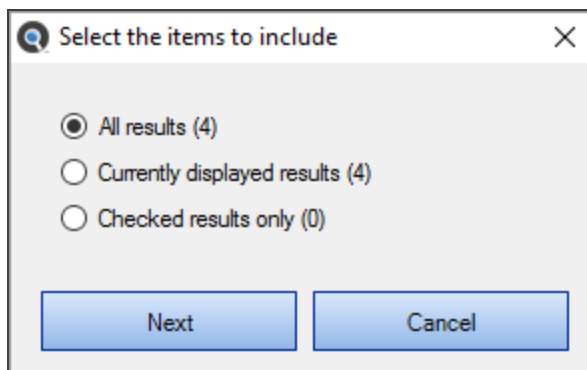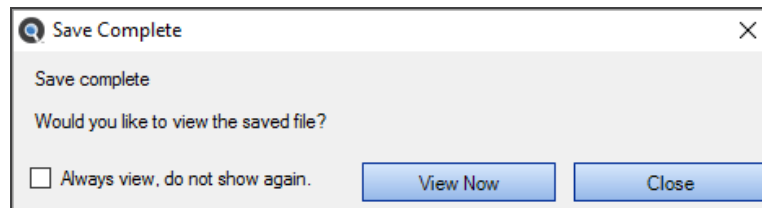   - **Matches Found**
   - **Original Line**

Export MS Project Tasks

An exported MS Project task list will create a spreadsheet containing all or a subset of your search results. This saved .xslx file can then be imported directly into MS Project as a set of tasks to be assigned to resources.

1. Open a previously saved search result using the `File -> Open` menu or perform a search.

2. From the Find it EZ menu, select `File -> Export -> MS Project Tasks`.

3. A **Select the items to include** pop-up will appear.

a. Click to choose one of the options; **All results**, **Currently displayed results**, or **Checked results only**.

b. Click on the Next button. A **Save As** dialog box will appear.

i. Navigate to the destination folder.

ii. Enter the desired **File name**.

iii. Click on the Save button.

c. A **Save Complete** pop-up will appear.

i. To view the saved file, click on the View Now button. The file will open in the selected viewer (see below).

> **Tip:** Click to check the **Always view, do not show again** check-box to always view the saved results file.

ii. To close the **Save Complete** pop-up, click on the Close button.

4. Exported search results will contain the following data columns:

- **Active** - Yes or No
- **Task_Mode** - Auto Scheduled or Manually Scheduled
- **Task_Name** - Search Source and Path
- **Notes** - Host and Path

Import Tasks to Microsoft Project

1. Open Microsoft Project.
2. From the *File* menu, select **New**.
3. On the **New** page, click **New from Excel workbook**.
4. In the **Open** box, click the arrow next to **XML Format**, and pick **Excel Workbook**.

5. Locate and select the workbook you want to import, and click **Open**.

6. In the **Import Wizard**, click **Next** to get started, and follow the steps to complete the import.
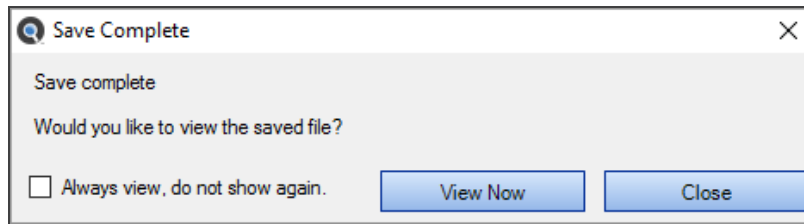
Export Error List

An exported errors list will create spreadsheet containing all errors from your most recent search results. If there are no errors to export, an alert will indicate there is nothing to save. This saved .xslx file can then be sent to FinditEZ technical support or used to review individual files that may be corrupt for further investigation or required repair/removal from your system.

1. Open a previously saved search result using the `File -> Open` menu or perform a search.

2. If any errors are generated during the search, the **Errors** tab in the **Results** window will be selected automatically, the total number of errors will be shown on the tab label, and error details will be listed.

3. From the Find it EZ menu, select `File -> Export -> Error List` .
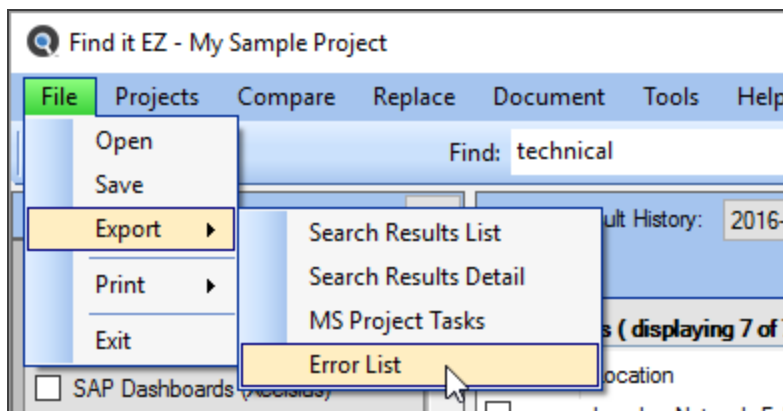
4. A **Save As** dialog box will appear.
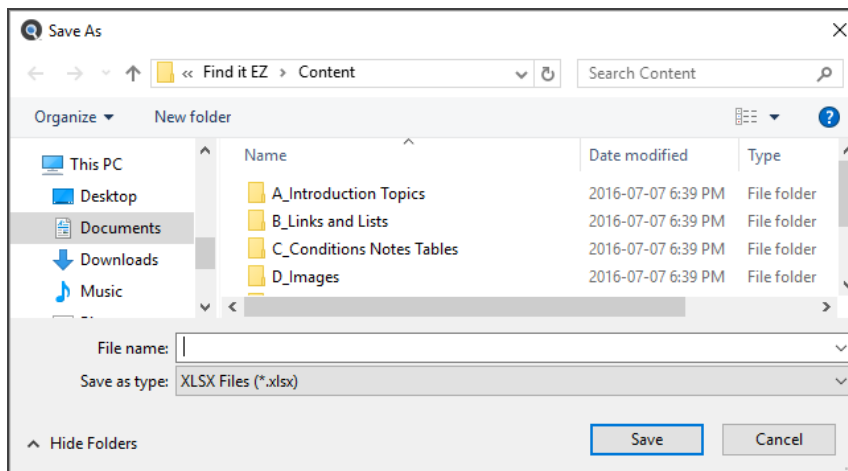
   a. Navigate to the destination folder.

   b. Enter the desired **File name**.

   c. Click on the Save button.

5. A **Save Complete** pop-up will appear.

    a. To view the saved file, click on the `View Now` button. The file will open in the selected viewer (see below).

> **Tip:** Click to check the **Always view, do not show again** check-box to always view the saved results file.

    b. To close the **Save Complete** pop-up, click on the `Close` button.

6. The exported error list will contain the following data columns:

- **Location**
- **Type**
- **Host**
- **File Path or Database**
- **Document**
- **Error**
- **Details**

See Also:

- "Wizards Overview" on page 68
- "Perform a Regular Search" on page 109
- "Work With Search Results" on page 171
- "Viewer / Editor Settings" on page 52
- Set User Options

Print Results

Follow these instructions to print search results or search result details.

Print Search Results List

Printing a search results list will create a colour-highlighted HTML document containing all or a subset of your search results. This HTML file will automatically load within your default browser and can either be saved or printed using your default or an alternate selected printer from the print dialogue that appears.

1. Open a previously saved search result using the `File -> Open` menu or perform a search.

2. From the Find it EZ menu, select `File -> Print -> Search Results List` .

3. A **Select the items to include** pop-up will appear.

a. Click to choose one of the options; **All results**, **Currently displayed results**, or **Checked results only**.

b. Click on the Next button. A report containing the selected results will open in a new browser window and a browser **Print** dialog will be launched.

> **Tip:** You can save a copy of the generated HTML file by simply closing the printer dialog and using your default browser *File -> Save* menu options.

4. Select the **Destination** and configure print settings, as desired.

5. Click on the Print button. The report will be sent to the selected destination printer or file.

6. The generated report will contain the following data:

    Header:

    - **Date Created**
    - **Search Type**
    - **Search Options**
    - **Search Expression**
    - **File Locations**

    Columns:

- Source **Location**
- File **Type**
- **Host** Name
- File **Path or DB** (Database)
- **Object** Name
- **# Found** (Matches)

Print Search Result Details

Printing search results details will create a colour-highlighted HTML document containing all or a subset of your search results. This HTML file will automatically load within your default browser and can either be saved or printed using your default or an alternate selected printer from the print dialogue that appears.

1. Open a previously saved search result using the `File -> Open` menu or perform a search.

2. From the Find it EZ menu, select `File -> Print -> Search Results Detail`.

3. A **Select the items to include** pop-up will appear.
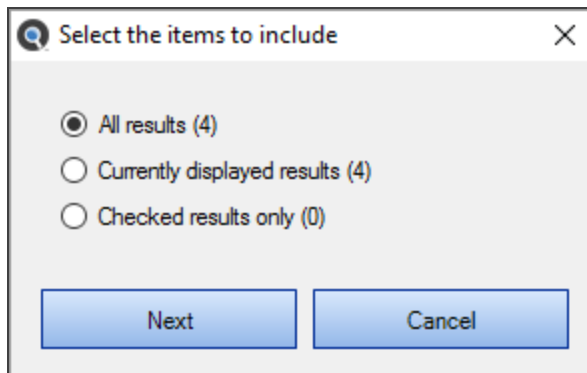
   a. Click to choose one of the options; **All results**, **Currently displayed results**, or **Checked results only**.

   b. Click on the `Next` button. A report containing the selected results will open in a new browser window and a browser **Print** dialog will be launched.

> **Tip:** You can save a copy of the generated HTML file by simply closing the printer dialog and using your default browser *File -> Save* menu options.

4. Select the **Destination** and configure print settings, as desired.

5. Click on the Print button. The report will be sent to the selected destination printer or file.

6. The generated report will contain the following data:

Report header:

- **Date Created**
- **Search Type**
- **Search Options**
- **Search Expression**
- **File Locations**
- **Search Category**

Header for each match found:

- Source **Location**
- File **Type**
- **Host** Name
- **Filepath or DB** (Database)
- **Object** Name
- **# Matches**

See Also:

- "Wizards Overview" on page 68
- "Perform a Regular Search" on page 109
- "Work With Search Results" on page 171

Exit Find it EZ

1. From the Find it EZ menu, select *File -> Exit* .

OR
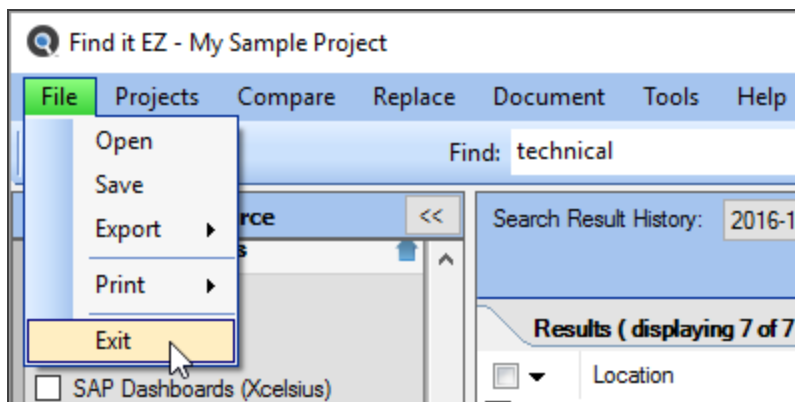
2. Click on the X button located in the upper, right corner of the screen.
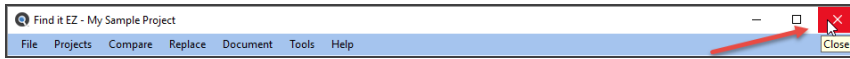
3. The program will close.

See Also:

- "Save Project Settings" on page 33
- "Add or Edit Annotations" on page 193
- "Mark Item(s) Complete or Incomplete" on page 189
- "Product Trials and Limits" on page 23
- "Work With Search Results" on page 171
- "Viewer / Editor Settings" on page 52
- "Set User Options" on the next page

User Settings and Customization
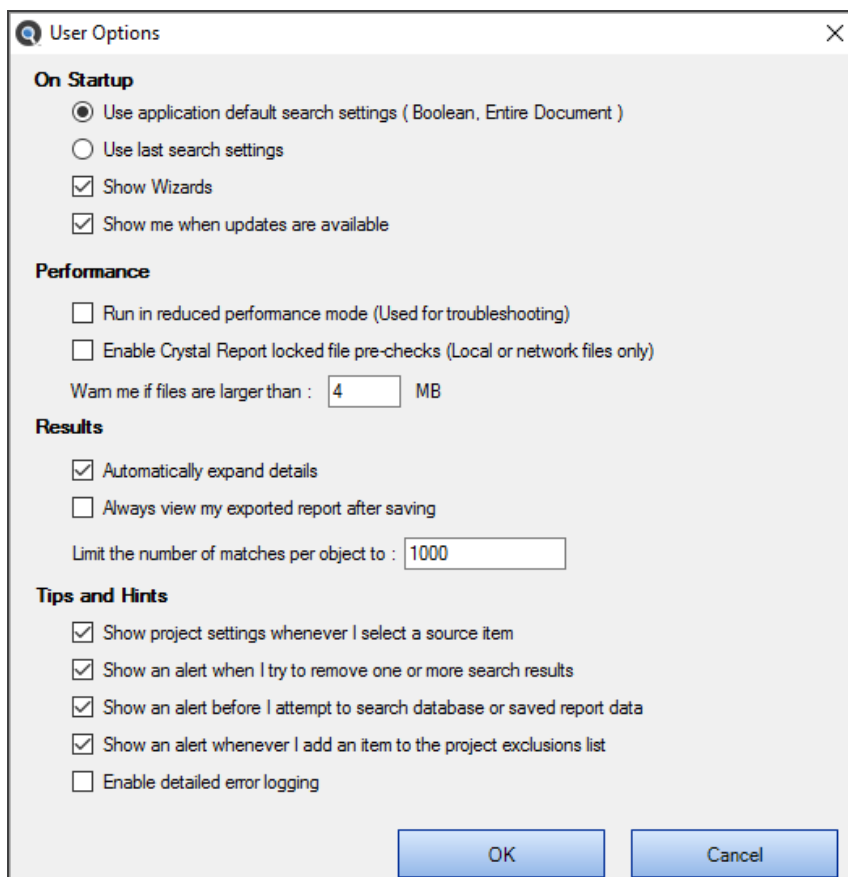
This section describes the steps required to set user options, preferences, and settings for Find it EZ. These configuration settings are permanently saved for each session, allowing each end-user to customize the software to their specific environment (source items) and preferences.

Set User Options

1. From the Find it EZ menu, select *Tools -> Customize -> User Options*.
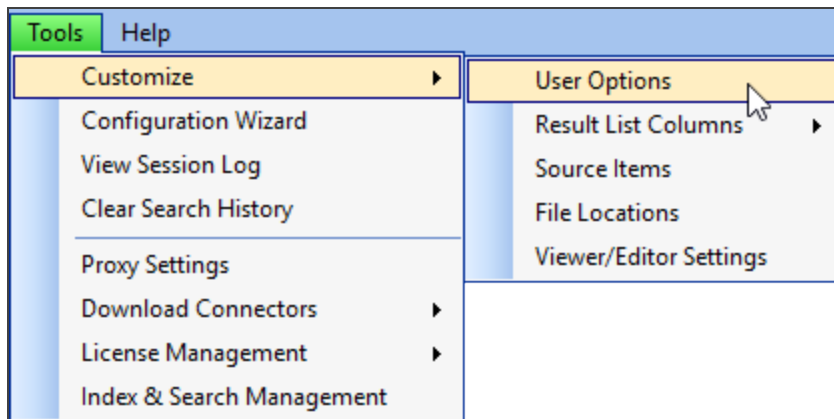
2. The **User Options** dialog box will appear, as below:

3. Choose, select, or enter settings as desired. Refer to the table below for details:

User Option	Description
Use application default search settings (Boolean, Entire Document)	Choose this option to apply the Find it EZ default search settings (i.e. **Search Type** = Boolean Search, OR see next option...
Use last search settings	Choose this option to apply the last-used search settings for the next search.
Show Wizards	Click to check this item if you want to launch the **Search Wizard** each time you start up Find it EZ.
Show me when updates are available	Click to check this item to receive a notification message when you start up Find it EZ when any new updates are available for download.

| User Option	Description
Run in reduced performance mode (Used for troubleshooting)	This option can be used if/when you have limited memory (RAM) on your computer and Find it EZ is freezing, crashing, logging .net memory issues, or taking a VERY long time to complete a search. The Find it EZ program will process the maximum number of documents simultaneously using threads. By dropping this to reduced performance mode, only a single document is processed at a time, reducing stress on a system with a limited amount of RAM. Default = Off (for optimal performance).
Enable Crystal Report locked file pre-checks (Local or network files only)	Allows the Crystal Reports scanner to detect locked files during indexing and, if a file is currently open or locked, to make a temporary copy of the file before allowing Crystal Reports to open it. Note that this feature is disabled by default as it can affect performance.
Warn me if files are larger than: ___ MB	When processing many documents in a folder & sub-folders (especially "text" type documents), this option will allow you to skip individual large documents during the search process that are found in a source folder; like error logs, etc. that may be in a file directory but do not need to be searched (as they will either return too many false positives OR will slow down processing unnecessarily). This gives you an opportunity at search run time to skip certain very large files you may not have wanted to be scanned but were in the folder and had a file type you do want to search other (smaller) documents for matches. You can change this setting to customize for your environment. Default = 4 MB.
Automatically expand details	Click to check this item to expand selected result details in the **Details** window when a result is selected in the **Results** window. If un-checked, details will appear collapsed. Click on the "+" to expand.
Always view my exported report after saving	Click to check this item if you want exported reports to open immediately after saving.
Limit the number of matches per object to: ___	Use this limit when too many matches are being returned in each individual document and you really only care if one or more "hits" are discovered. This will improve Find it EZ performance; once the limit of matches per document is reached, the search engine moves on to the next document and logs a "maximum hits reached" warning in the error log. Default = 1000.
Show project settings whenever I select a source item	Click to check this item to launch the **Project Settings** dialog box each time you select (check) an item in the **Source** panel. These settings allow you to include/exclude the selected item, configure and test connection settings and select folders (where applicable), apply filters, select the viewer/editor with which to open results, set options, and add or remove file extensions.
Show an alert when I try to remove one or more search results	Click to check this item if you want a confirmation message to appear (i.e. "Are you sure you want to remove this item from the search results?" Yes/No) each time you right-click on a result in the **Results** window and select **Remove**.

User Option	Description
Show an alert before I attempt to search database data	Everytime you are about to run a search that includes database table data, when this option is checked, an alert is displayed. This warns you that the search time may be long, depending on the size of the table. Find it EZ searches for matches in every column (field) of every row in the table. For a table with a significant number of text columns and rows, this can really affect the search performance and run time. Find it EZ allows for searching database table data, but this is intended for small "system" tables that are used in a dynamic table-driven software system. Such tables contain references to screen names, report labels, or even code to perform actions. This is also why we have the user explicitly choose a small subset of tables and do not offer a "search all tables" option. Basically, this reminds the user they are about to search data and gives them the option to cancel the search / disable data searching before proceeding. At a minimum, it lets them know why the search is taking awhile. Default = On (to warn the user everytime they are about to search table data). Note also that database table data searching is "disabled" by default.
Enable detailed error logging	This option is used to help identify the file on which a search may be getting stuck. It is best if used in combination with "reduced performance mode" enabled and will allow the system to log search steps in the "session log" in greater detail. This is often requested by tech support for sending in logs and helps expedite problem resolution. Default = Off.

4. Click on the OK button to save your settings. The **User Options** dialog box will close.

5. To discard any changes, click on the Cancel button.

Show or Hide Result List Columns

Note: There must be results listed in the **Results** window in order for the following menu option to be enabled for use. Column names shown in grey cannot be hidden.

1. From the Find it EZ menu, select *Tools -> Customize -> Result List Columns* .
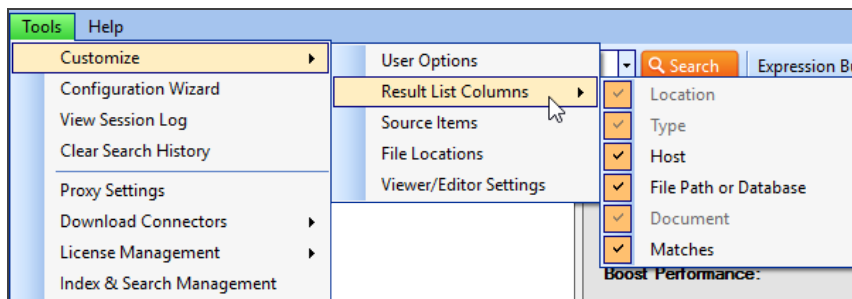
2. A list of column names will appear on the right (as above).

3. Click to show or hide columns, as desired. See note above.

Show or Hide Source Items

Note: These items are also set via the **Configuration Wizard**. Source items selected below will be reflected in both the main application (**Source** panel) and all Find it EZ wizards. Each time Find it EZ adds a new supported technology like a new database, reporting tool, or programming language, this new item is automatically "enabled" by default so that after upgrade, you see this new source item is now available (you can, of course, "hide" the item later - using the dialog box below - if it does not apply to you).

From the Find it EZ menu, select **Tools -> Customize -> Source Items** .
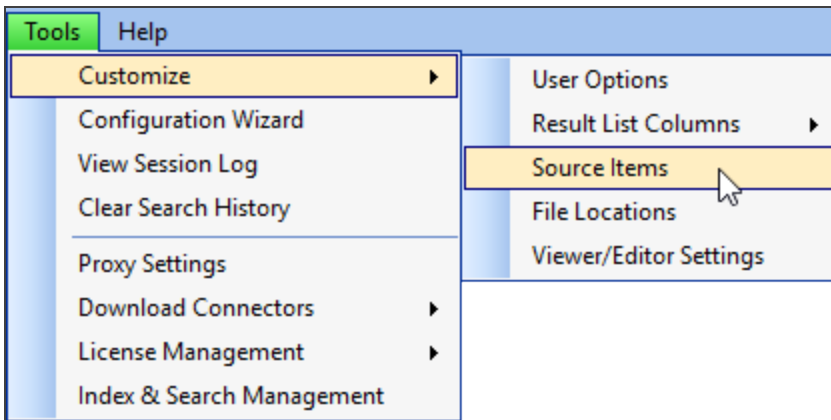
The **Source Items** dialog box will appear, as below:
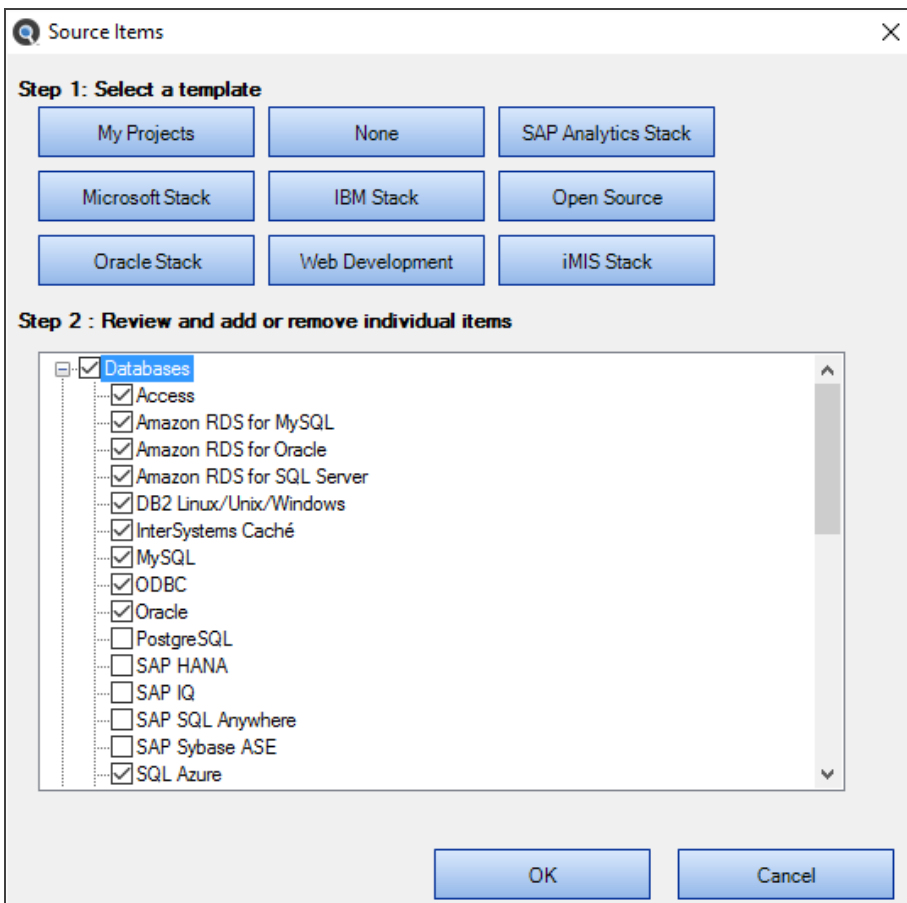
Note: Collapse (i.e. "-" buttons for each source category) are intentionally disabled so that any individual checked source items are always visible.

To create and apply a custom template:

1. Click on the **My Projects** template button. All source items in the list will be unchecked by default.

> **Note:** For an initial install, the default for the **My Projects** template = all items unchecked . However, if you have any pre-vious project documents saved in your index, when you click on the **My Projects** template button, any and all source type documents stored in the index will be selected. In addition, whenever we push out a new release that adds new source items, these are also 'checked' initially to highlight new items.

2. Scroll down to view items and click to check or un-check source items, as desired.

3. Click on the OK button to save.

To clear all individual items:

1. Click on the **None** template button. All individual source items will be un-checked.

2. Click to check at least one source item.

3. Click on the OK button to save.

To select, modify, and apply an existing template:

1. Click on the desired template button. Note that applicable items are selected in the list.

2. Scroll down to review the items included in the selected template.

3. Click to check or un-check individual items in the template, as desired.

4. Click on the OK button to save.

To discard any changes, click on the Cancel button.

Show or Hide File Locations (Repositories)

1. From the Find it EZ menu, select **Tools -> Customize -> File Locations** .
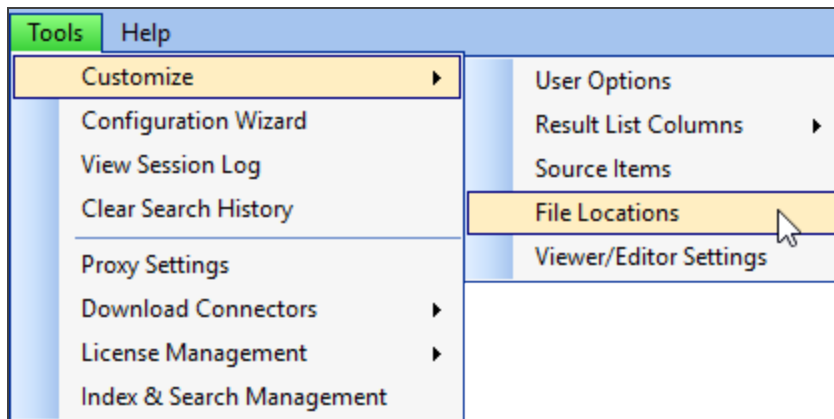
2. The **File Locations** dialog box will appear, as below:

---
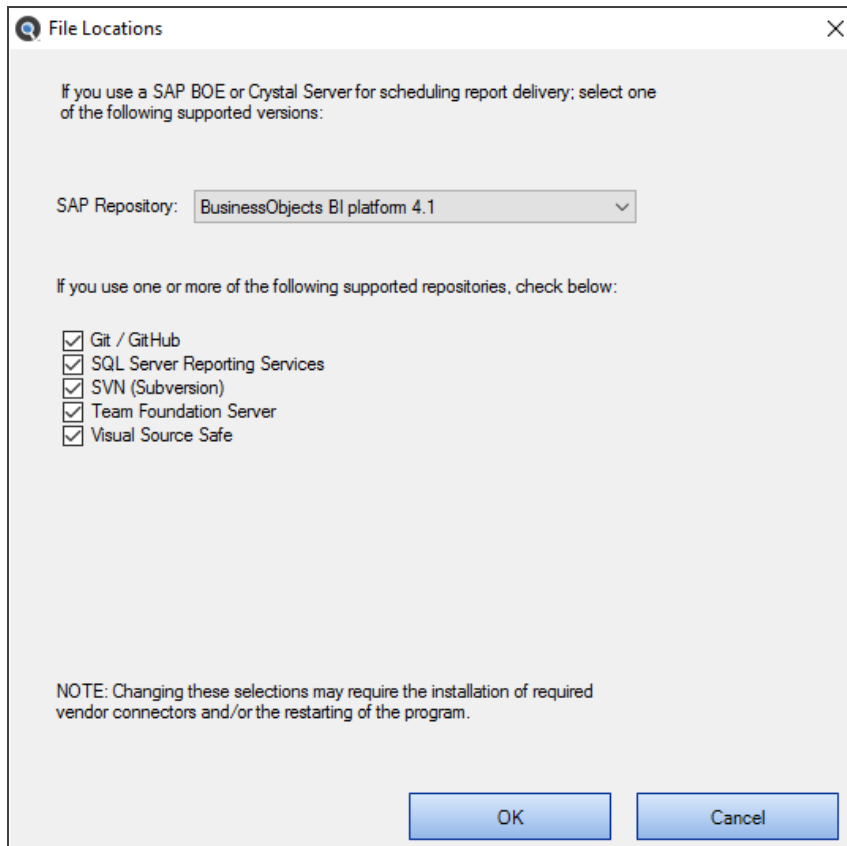
3. If you use a SAP BOE or Crystal Server for scheduling report delivery, select a version from the **SAP Repository** drop-down list.

4. If you use one or more of the supported repositories, click to check all those that apply.

> **Alert:** Changing these selections may require Find it EZ to automatically install any required vendor connectors and/or to restart the program.

5. Click on the OK button to save and close.

6. To discard any changes, click on the Cancel button.

> ## See Also:
>
> • "Download Connectors" on page 280

Viewer / Editor Settings

These settings allow you to select the viewer/editor used to open a search result list item.

> **Note:** The Windows Default Editor (referenced below) is set at the Windows operating system level by the end user when you install a new program. Or, you can change the default editor settings in Windows 7 via **Start -> Default Programs** or in Windows 10 via **Start -> Settings -> System -> Default Apps**.

1. From the Find it EZ menu, select **Tools -> Customize -> Viewer/Editor Settings** .
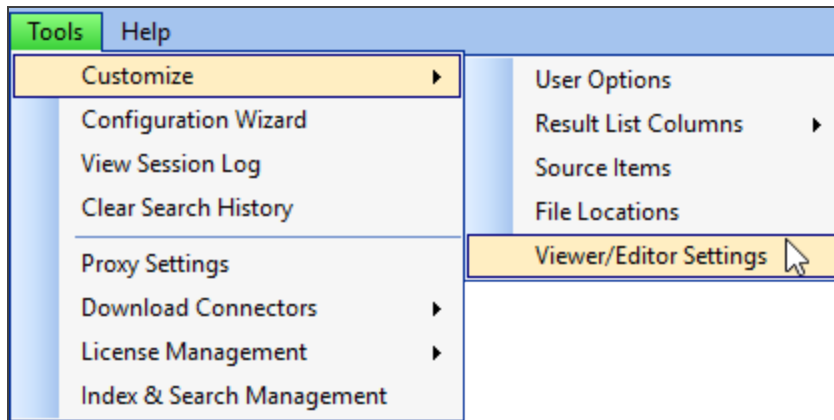
2. The **Configure Viewer/Editor Settings** dialog box will appear, as below:
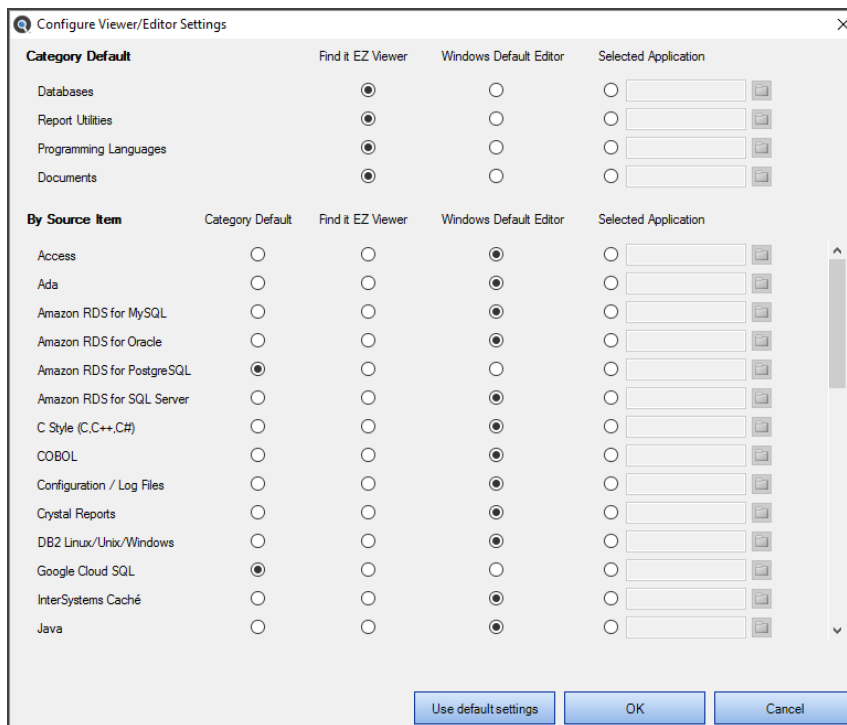
3. In the **Category Default** section:

   a. For each category, choose one of the following viewer/editor options:

      • **Find it EZ Viewer**

      • **Windows Default Editor**

      • **Selected Application**

b. IF **Selected Application** is chosen:

    i. Click on the corresponding folder icon. An **Open** dialog box will appear.
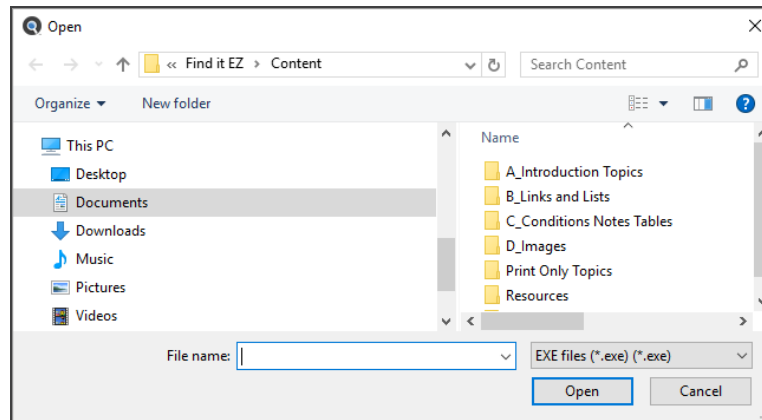
    ii. Navigate to the program application you want to use to open this type of file.

    iii. Click on the Open button.

OR,

4. In the **By Source Item** section:

    a. For each source item, choose one of the following viewer/editor options:

        • **Category Default**

        • **Find it EZ Viewer**

        • **Windows Default Editor**

        • **Selected Application**

    b. If **Selected Application** is chosen:

        i. Click on the corresponding folder icon. An **Open** dialog box will appear (as above).

        ii. Navigate to the program application you want to use to open this type of file.

        iii. Click on the Open button.

5. To set all source items to use the **Category Default** viewer/editor settings, click on the Use default settings button.

6. To save any changes and close the **Configure Viewer/Editor Settings** dialog box, click on the OK button.

7. To discard changes and keep it open, click on the Cancel button.

Configuration Wizard

The Configuration Wizard walks you through the steps required to set up your Find it EZ program so that it is optimized to your environment. It is recommended that you only select and display reports, databases, repositories, programs, version control systems and other files in use within your organization. The configuration wizard is automatically launched after each install, including prduct upgrades. These settings can also be changed at any time as your company adds or removes support for individual file types or technologies in use.

Note: With each new technology supported by a Find it EZ release update, any new databases, programs, reports, or other source items will appear in the left hand panel to bring these new features to your attention. It is recommended that you use the configuration wizard to disable any such source items that are not in use within your organization in order to remove clutter from the Find it EZ interface.
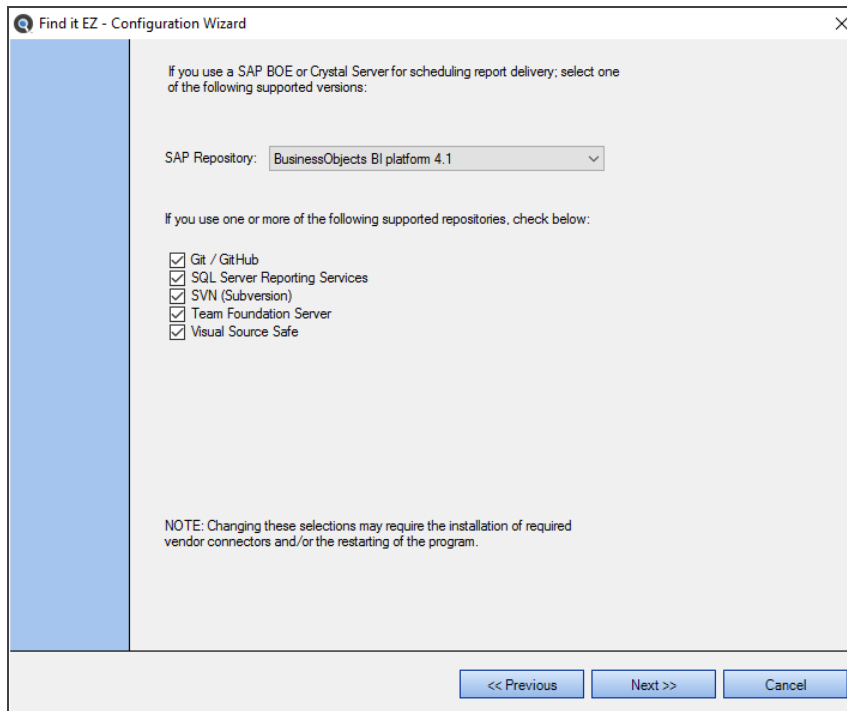
1. From the Find it EZ menu, select **Tools -> Configuration Wizard** .
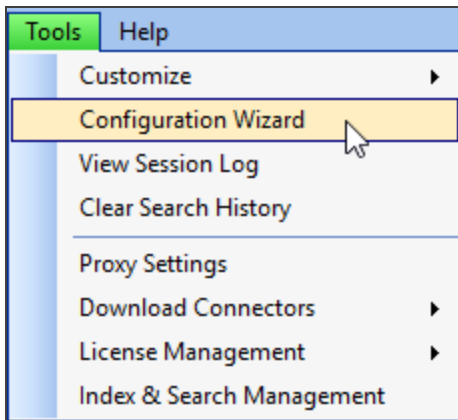
2. The **Configuration Wizard** will appear, as below:
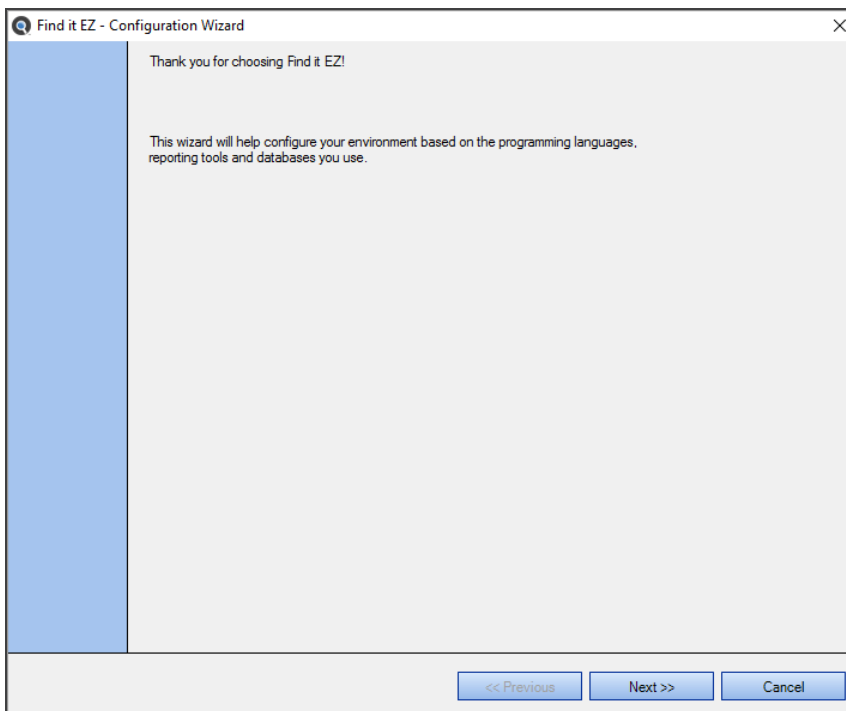
3. Click on the Next >> button to continue, and follow the instructions.

a. If you use a SAP BOE or Crystal Server for scheduling report delivery, select a version from the **SAP Repository** drop-down list.

b. If you use one or more of the supported version control systems or BI report scheduling repositories, click to check all those that apply to your work environment.

c. Click on the Next > button to continue.
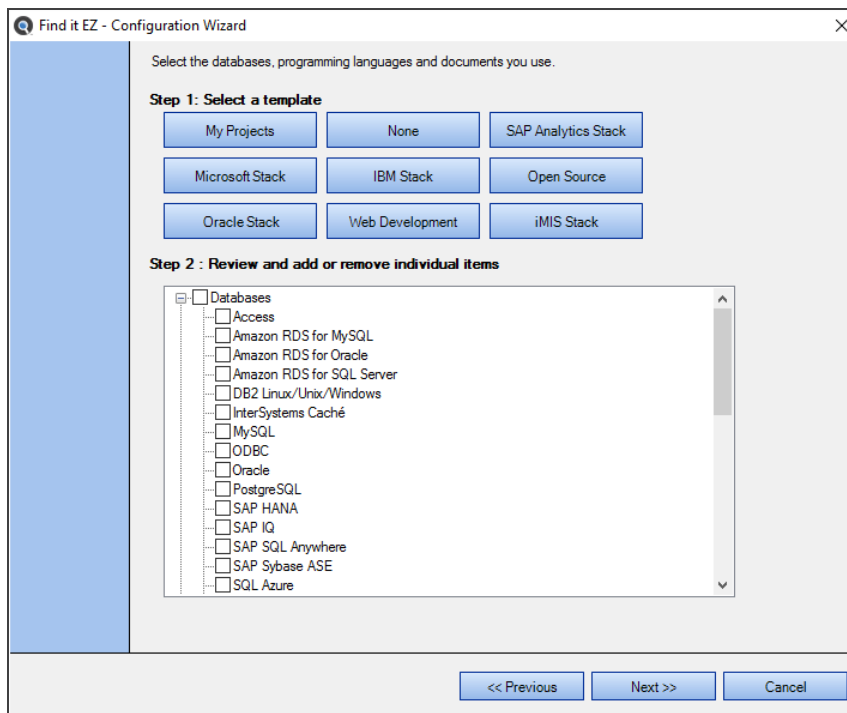
4. Click to select all database types, programming languages and documents used by your organization. Selecting a subset of these available technologies supported by Find it EZ allows you to customize the program source, wizards and and project configuration panels by only displaying the items applicable to your work space.

To create and apply a custom template:

a. Click on the **My Projects** template button. See note below:

> **Note:** Clicking on the **My Projects** template button will reset (i.e. check) only the source items you have included across all of your previously saved Find it EZ projects. If this is the VERY first time you are installing Find it EZ, this will blank out (i.e. uncheck) everything. Then, you must select only those items you have installed and would use Find it EZ to search. In addition, when you install an upgrade that adds new source items, these are also 'checked' initially to highlight new items.

b. Scroll down to view items and click to check or un-check source items, as desired.

c. Click on the OK button to save.

To clear all individual items:

a. Click on the **None** template button. All individual source items will be un-checked.

b. Click to check at least one source item.

c. Click on the OK button to save.

To select, modify, and apply an existing template:

a. Click on the desired template button. Note that applicable items are selected in the list.

b. Scroll down to review the items included in the selected template.

c. Click to check or un-check individual items in the template, as desired.

d. Click on the OK button to save.

To discard any changes, click on the Cancel button.

> **Note:** If one or more items selected require a vendor connector, you will be prompted to install each. See example below:

Connector Required   ✕

The SAP HANA Database Client is not installed on your system and is required in order to search SAP HANA. Do you want to install it?

Yes   No
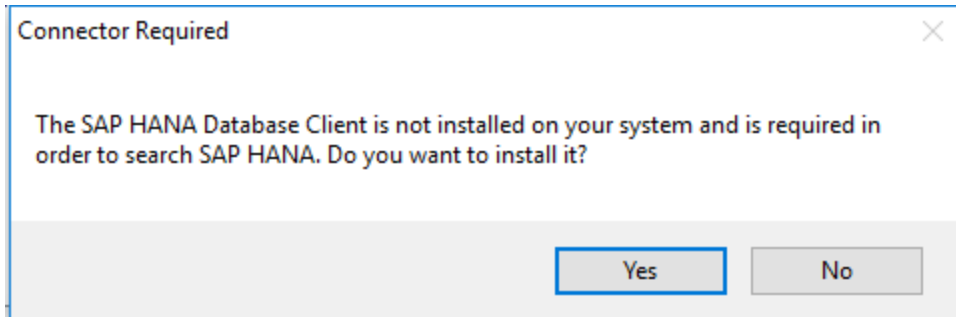
5. Click on the Yes button to automatically download and install a compatible version of each required connector. The automated download and install will begin.

Downloading SAP HANA Database Client

Progress: 4.3 MiB/43.6 MiB (9% complete)

Cancel
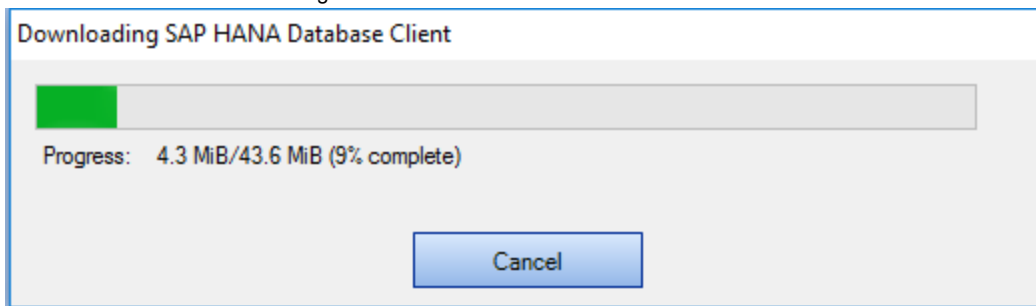
6. Follow the setup instructions for each connector to complete the installation. The Find it EZ program will automatically restart to apply settings and recognize the connectors for use.

7. Repeat the above steps until all required connectors have been installed.

8. The final configuration panel allows you to customize which installed editor or viewer to use when opening a document from the Find it EZ **Search Results** panel.

9. Click to select and customize your preferred default viewer / editors. You can use the **Category** settings or override for individual **Source Items**. Click the Use default settings button to reset Categories and all Source Items to use the internal Find it EZ viewer.

10. Click the OK button to save and apply all settings, or the Cancel button to discard all changes and revert to your previous settings.

> **See Also:**
> - "Show or Hide File Locations (Repositories)" on page 51
> - "Show or Hide Source Items" on page 49

> • "Viewer / Editor Settings" on page 52

Clear Expressions History

Each time you perform a search, the search expression is added to a the top of a history list that can be accessed by using the (drop-down arrow) to the right of the **Find** text box within the search bar. A maximum of the most recent 25 expressions are saved, with the oldest simply dropping off the bottom of this history list as new searches are performed. To access find expressions history for re-running a previous search expression, simply click on the **Find** box drop down arrow.
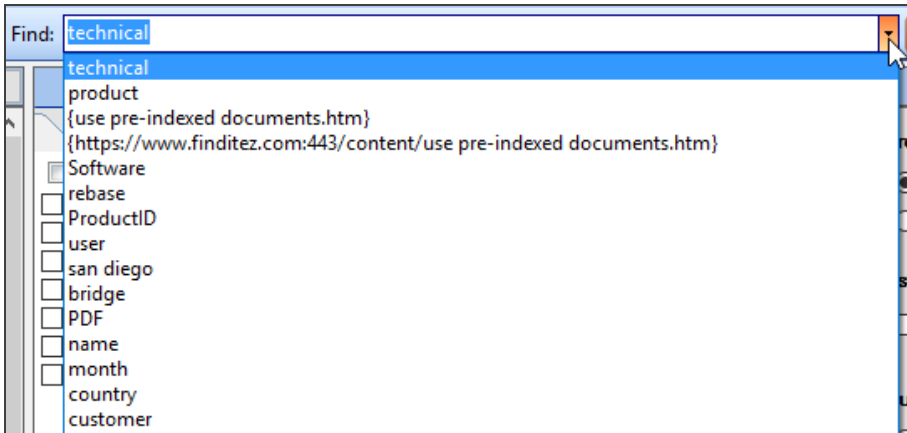
To clear the search expressions history:

- • From the Find it EZ menu, select **Tools -> Clear Search History** .
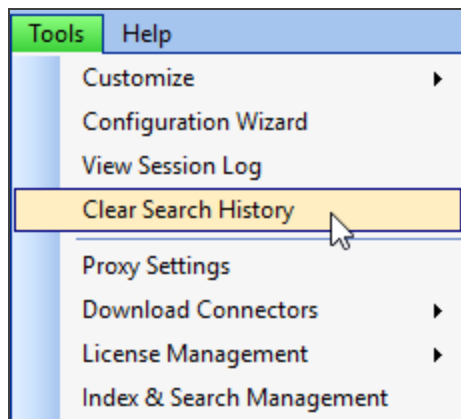
- • All previous search expressions will be deleted (except for the current search expression).

Index & Search Management

This section provides instructions to clear your current documents index or search history in order to recover disk space. You may also create an index summary report to review the contents of your current or search history indexes.

Find it EZ stores an optimized, tokenized version of your documents, along with meta-data and a keyword dictionary in the following default location:

- **(DevSurge 365)** C:\ProgramData\Bits n Bytes Software Inc\Find it EZ - Enterprise\Data\username\Index2\DataStore\
- **(Code Search Pro – Desktop or Server)** C:\ProgramData\Bits n Bytes Software Inc\Find it EZ\Data\username\Index2\DataStore\

Saved search results meta-data and pointers default location is here:

- **(DevSurge 365)** C:\ProgramData\Bits n Bytes Software Inc\Find it EZ - Enterprise\Data\username\Index2\SearchResults\
- **(Code Search Pro – Desktop or Server)** C:\ProgramData\Bits n Bytes Software Inc\Find it EZ\Data\username\Index2\SearchResults\

A proprietary set of NoSQL key-value hash indexes are used to store information about all source documents, projects and search results. These sets of index files are loaded into RAM while the program is running and updated as part of each index refresh. Persistent copies of these index files are located in these default locations:

- **(DevSurge 365)** C:\ProgramData\Bits n Bytes Software Inc\Find it EZ – Enterprise\Data\username\Index2\DOCUMENTS.*
- **(DevSurge 365)** C:\ProgramData\Bits n Bytes Software Inc\Find it EZ – Enterprise\Data\username\Index2\PRJDOCUMENTS.*
- **(DevSurge 365)** C:\ProgramData\Bits n Bytes Software Inc\Find it EZ – Enterprise\Data\username\Index2\SEARCH.*
- **(Code Search Pro – Desktop or Server)** C:\ProgramData\Bits n Bytes Software Inc\Find it EZ\Data\username\Index2\DOCUMENTS.*
- **(Code Search Pro – Desktop or Server)** C:\ProgramData\Bits n Bytes Software Inc\Find it EZ\Data\username\Index2\PRJDOCUMENTS.*
- **(Code Search Pro – Desktop or Server)** C:\ProgramData\Bits n Bytes Software Inc\Find it EZ\Data\username\Index2\SEARCH.*

> **Alert:** You should never add, remove or change files directly that are stored in the index folder as this will corrupt your index. However, you can view and monitor the amount of physical disk space used by your Find it EZ indices within this folder.

In addition, Find it EZ uses a SQLite database to store your project configuration settings. This database is located here:

- **(DevSurge 365)** C:\ProgramData\Bits n Bytes Software Inc\Find it EZ – Enterprise\Data\username\Index\config.db
- **(Code Search Pro – Desktop or Server)** C:\ProgramData\Bits n Bytes Software Inc\Find it EZ\Data\username\Index\config.db

You can open this database using a SQLite query tool at your discretion. However, it is recommended that you use the packaged Find it EZ utilities to Repair or Reset this database.

> **Alert:** Manipulating data in this database directly will corrupt your Find it EZ project settings. You will lose your project settings and be forced to Reset to factory defaults with our repair utility (see below).

Change Index Storage Location

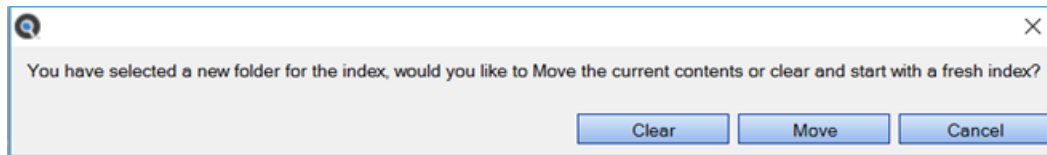1. From the Find it EZ menu, select **Tools -> Index & Search Management** .
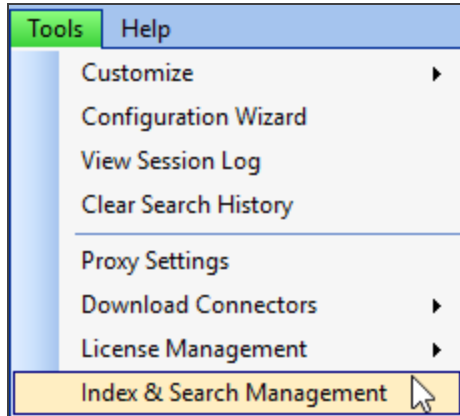
2. The **Index & Search Management** dialog box will appear, as in the example below:
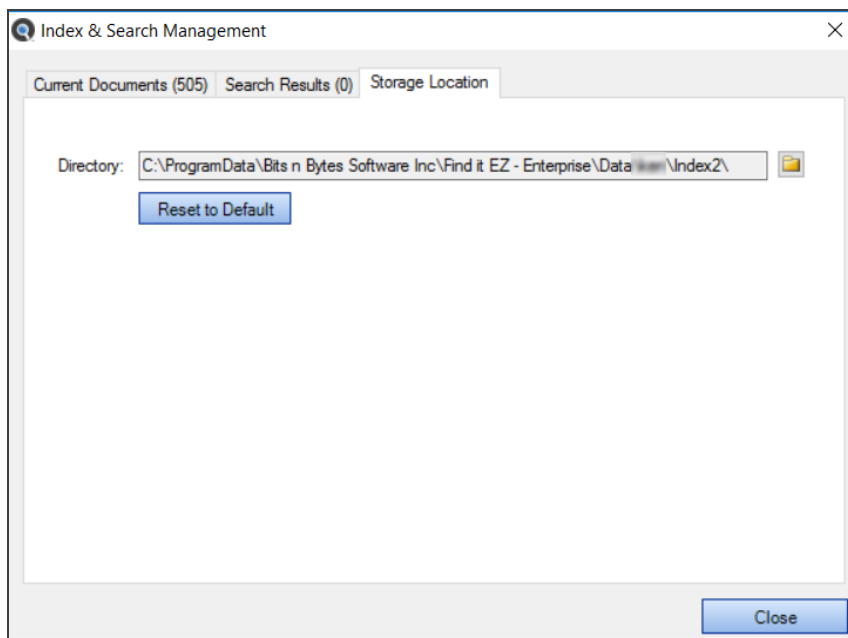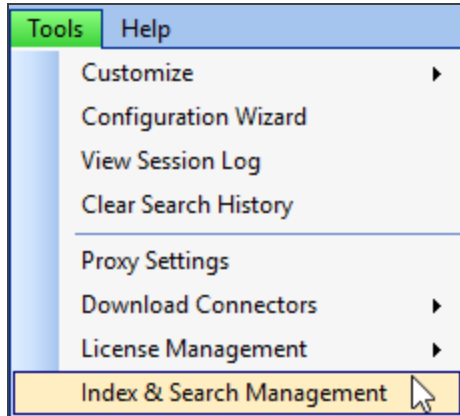

Note: You can move your Find it EZ index storage location to an alternate drive for additional space or improved performance on a faster (eg SSD) drive.

3. Select the **Storage Location** tab. Click on the folder browser button [icon]. Select the new desired index storage location using the Windows file browser.

4. After changing the current storage location path, you will see an Apply button appear at the bottom of the **Storage Location** tab, to the left of the **Close** button. Click the **Apply** button. You will be prompted to move (keep) the existing indexed

documents or clear your index.

> You have selected a new folder for the index, would you like to Move the current contents or clear and start with a fresh index?
>
> [Clear] [Move] [Cancel]

5. Click the **Clear** button to create a new, empty index or click the **Move** button to copy your current indexed documents to the new location. Click the **Cancel** button to abort.

> **Note:** When you choose to clear or move your index, your old index folder is automatically deleted to release previously used disk space.

Clear Index or Subset

> **Alert:** When clearing the index or a subset from the **Current Documents** tab, any indexed documents that are contained in saved search results are not deleted. To remove documents contained in saved search results, use the **Saved Search Results** tab. Multiple copies of documents are stored in your index whenever an updated version of the same file are detected if they have been saved within any search results. This preserves the state of the file contents at the time the search results were saved, while also maintaining a "current" copy for subsequent search, compare, and documentation use.

1. From the Find it EZ menu, select *Tools -> Index & Search Management* .
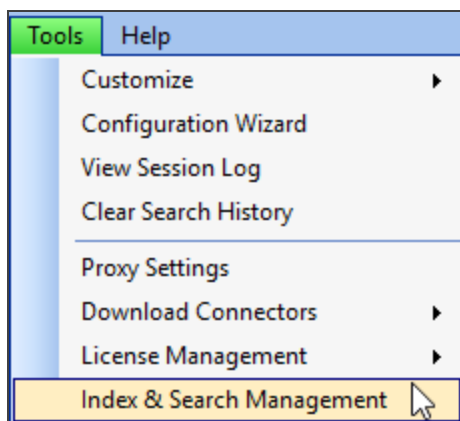
2. The **Index & Search Management** dialog box will appear, as in the example below:
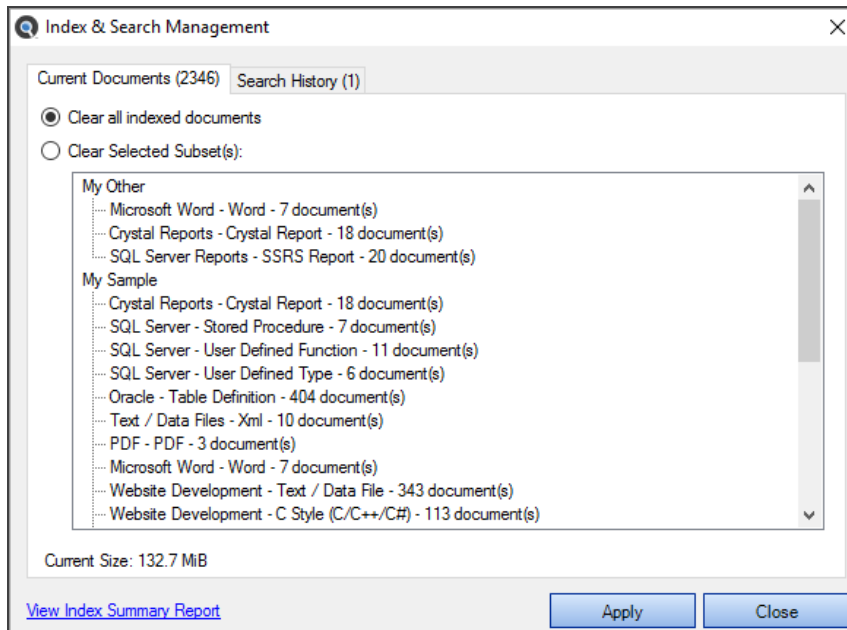
Note: The current size of your indexes are shown at the bottom of each **Index & Search Management** tab dialog box (see above example). If you feel this is too large (e.g. you are running out of hard drive space), you can shrink the database to try and reclaim some of that space. The benefits can be significant as the underlying database is a "grow only" type system. If, for example, you had 15,000 documents at one point and only have 200 now, you could reclaim a lot of space.

3. Select the **Current Documents** or **Search Results** tab. Current documents are the latest versions of all files contained in your index. Search results contain a list of all documents linked to any active session search results or previously saved search results history.

4. To clear the entire index:

    a. Click to choose the **Clear the entire index** option.

    b. Click on the Apply button.

    OR

5. To clear a subset(s) of the index:

    a. Click to choose the **Clear the following subset** option. A check-box will appear before each project and subset.

    b. Click to check the project(s) or subset(s) you want to clear.

    c. Click on the Apply button. The selected project(s) and or subset(s) will be cleared from the index.

View Index Summary Report

1. From the Find it EZ menu, select **Tools -> Index & Search Management** .

Tools	Help
Customize	▶
Configuration Wizard	
View Session Log	
Clear Search History	
Proxy Settings	
Download Connectors	▶
License Management	▶
Index & Search Management	

2. The **Index & Search Maintenance** dialog box will appear.

Index & Search Management ✕

Current Documents (2346)   Search History (1)

◉ Clear all indexed documents
◯ Clear Selected Subset(s):

My Other
   Microsoft Word - Word - 7 document(s)
   Crystal Reports - Crystal Report - 18 document(s)
   SQL Server Reports - SSRS Report - 20 document(s)
My Sample
   Crystal Reports - Crystal Report - 18 document(s)
   SQL Server - Stored Procedure - 7 document(s)
   SQL Server - User Defined Function - 11 document(s)
   SQL Server - User Defined Type - 6 document(s)
   Oracle - Table Definition - 404 document(s)
   Text / Data Files - Xml - 10 document(s)
   PDF - PDF - 3 document(s)
   Microsoft Word - Word - 7 document(s)
   Website Development - Text / Data File - 343 document(s)
   Website Development - C Style (C/C++/C#) - 113 document(s)

Current Size: 132.7 MiB

View Index Summary Report   Apply   Close

3. At the bottom of the dialog box, click on the **View Index Summary Report** link. The **Index Summary** report will open in the selected viewer.

4. The report will include the following data; one row per unique document:

- **Location** – original physical location of the source document
- **Type** – the type of document (e.g. Java, HTML, Crystal Report, Stored Procedure, etc.)
- **Host** – original local or network host name of the source document
- **File Path or Database** – original folder path or Database name of the source document
- **Document** – document name

- **Last Updated** – source document last updated timestamp (when available from the host system)
- **Last Indexed** – document last indexed timestamp
- **Size (KiB)** – indexed document size in kilobytes

Repair Index or Reset to Factory Defaults

In rare cases, if your index and/or project configuration files become corrupt and prevent Find it EZ from starting or the program performance degrades to an extremely slow condition, you will need to use the Index repair utility. The repair utility is a separate program, automatically installed along with the main Find it EZ application and uninstall utility.

1. To start the repair tool, use the Windows Start menu to navigate to executables installed within the Find it EZ programs folder.

2. Run the **Index Repair Tool**.
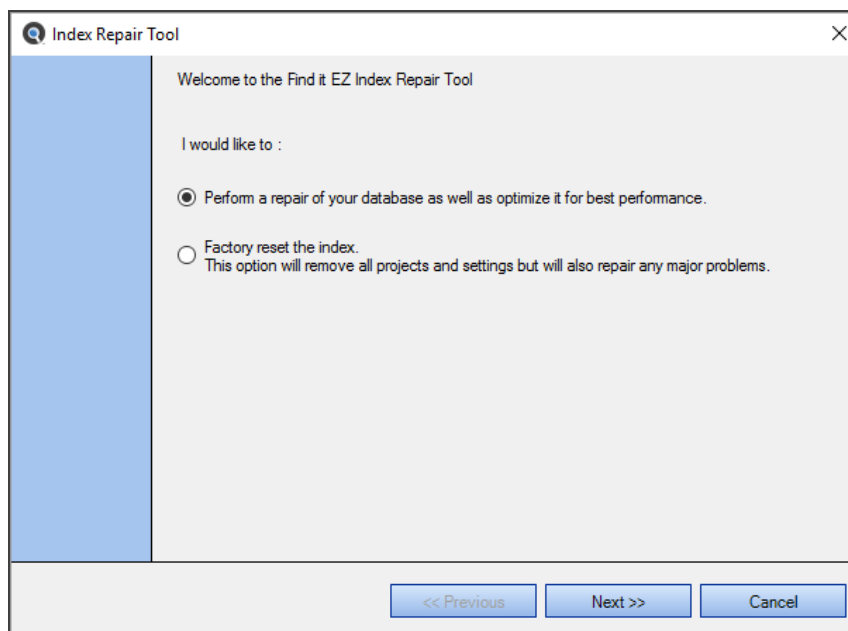
3. The utility dialogue window will prompt for one of two options:

   a. The Repair Index option will clear your entire index and attempt to repair your project configuration settings database. This will resolve most issues while preserving your saved project settings, and is the recommended first repair attempt.

   b. The Factory reset option will clear your entire index AND all of your project settings will be lost. This is recommended as a last resort, but may be necessary if your project settings database becomes corrupt and can not be recovered or repaired.

4. Click the Next >> button to run the selected repair option. A **Repair** dialogue will appear indicating progress.

Repair

- Stopping Dev Surge 365 Enterprise
- Clearing the Index
- Verifying user settings
- Compacting, shrinking and optimizing the database
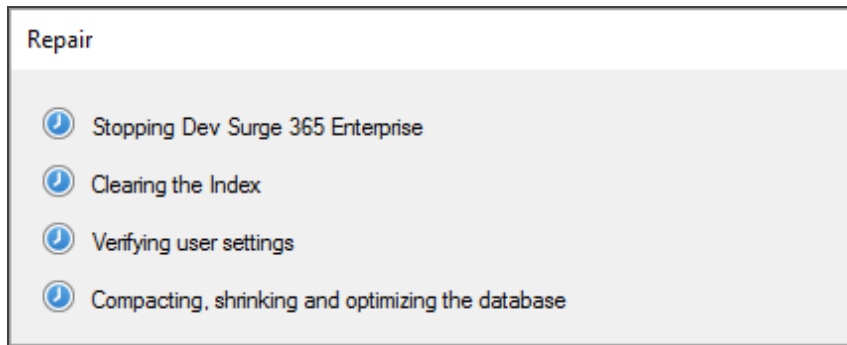
5. If the Repair Index option does not work, try a Factory Reset. If this still does not resolve the issue, contact Find it EZ technical support.

Get Started with Wizards

This section provides step-by-step procedures required to use the various Find it EZ 'wizards' to walk you through common tasks, to perform a regular search, to use the expression builder, and to understand the features of the Searching status window (including multitasking while searching, errors, and stopping a search).

A 'wizard' is a sequence of dialog boxes that lead you through a series of well-defined steps. This section will introduce you to the following four basic types of Find it EZ wizards:

- Search Wizard
- Compare Wizard
- Document Wizards
- Replace Wizards

Wizards Overview

This section describes how to launch the various available **Wizards**, understand the purpose of each unique option, and to set the main **Wizards** dialog to show (or not) on application start-up.

Launch the Wizards

The **Wizards** walk you through the steps required to set up and run a search, generate documentation, and perform other common tasks. If the **Show on Start-up** option is selected, the **Wizards** dialog will open automatically when you start up Find it EZ.

> **Note:** The **Show on Start-up** option is selected by default when Find it EZ is run for the first time.

If the **Wizards** dialog does not open automatically, follow these steps:

1. Click on the Wizards button. The **Wizards** dialog box will appear.
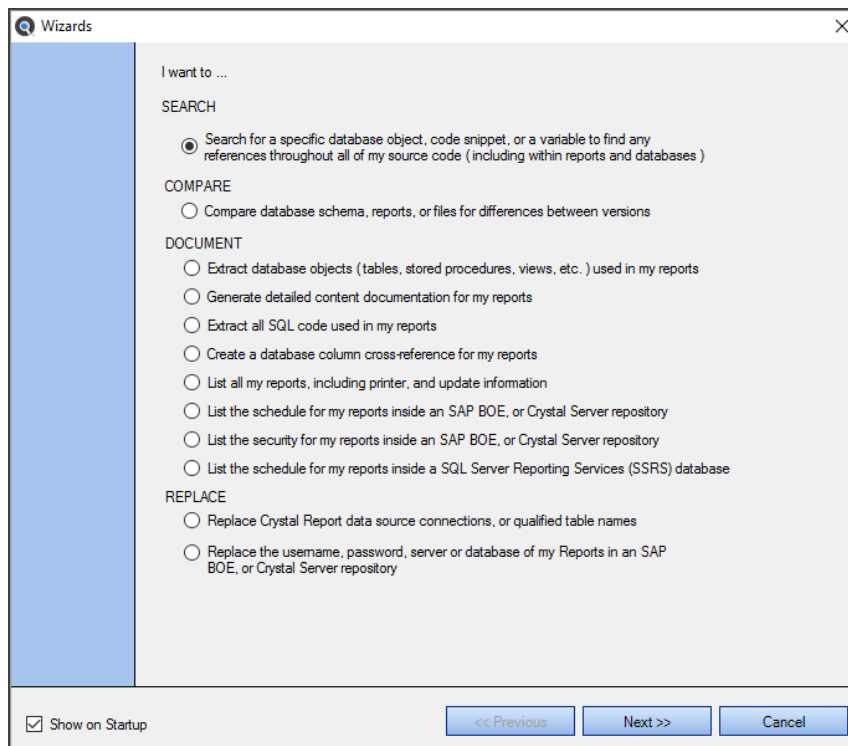
   a. Click to choose the desired search option.

   b. Click on the Next button to continue.

2. Create or select a new project:

   a. Click to choose the **Use an existing project** option, then select the desired project from the drop-down list,

   OR

   b. Click to choose the **Create a new project** option and enter the desired project name into the corresponding text box.

   c. Click on the Next button to continue.

3. Select the file types to include in your search:

   a. Click to check each item you want to include.

   b. Click on the Next button to continue.

4. Select the desired file locations:

   a. Click to check any **File Locations** you want to search.

   b. Click to check any **Databases** you want to search.

   c. Click on the Next button to continue.

5. Enter connection information for each repository or database.

> **Note:** If more than one source location is selected, connection information will be requested for each source.

a. Click on the Test Connection button to verify your connection.

b. Click on the Next button to continue.

6. Enter your search criteria:

a. Enter a search term into the **Find** text box.

b. Click on the Start Search button. A search dialog box will appear showing the status of the search.
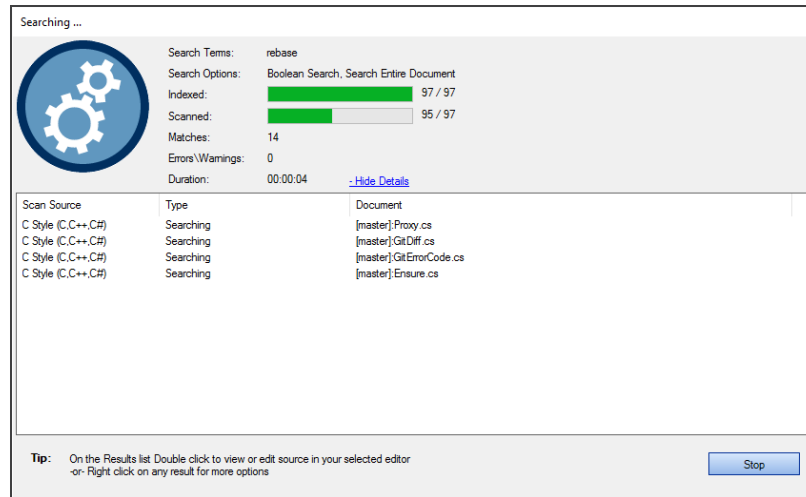
7. Once the search is complete, results will appear in the **Results** window.

Wizards Options

Refer to the image and table below for a description of each option:

#	Wizard	Menu Shortcut	Use Case / Document Produced	Sample Documents
1	Search for a specific database object, code snippet, or a variable to find any references throughout all of my source code (including within reports and databases)	See links at end of topic.	Use Boolean or Wildcard search expressions to find all references to any text throughout your entire code stack, data files or office documents. Search results are displayed in the main application window with highlighted match details for each document containing a "hit." Interactive to-do list results can then be used to launch an editor of your choice to work with the original source document, or lists can be updated, saved, printed or exported to various file formats such as HTML, text, CSV or Excel spreadsheets as needed.	**List XLSX** **List HTML** **Detail XLSX** **Detail HTML**
2	Compare database schema, reports, or files for differences between versions	*Compare -> Documents, Reports & Databases*	Mass compare release branches for differences in versions of your code files, reports or database schema and SQL code objects (procedures, triggers, views, functions). Drill down with detailed "diff" tool to view highlighted side-by-side target and source file differences pinpointing exactly what has changed. Export results to Excel lists or scrollable, highlighted HTML.	**List XLSX** **Detail HTML** **Detail XLSX**

#	Wizard	Menu Shortcut	Use Case / Document Produced	Sample Documents
3	Extract database objects (tables, stored procedures, views, etc.) used in my reports	*Document -> Business Intelligence -> Database Cross-Reference*	Create a list of data source connections, server host names, database names, tables, procedures, views, table links (joins), call statements, parameters and includes both embedded SQL SELECT statements from within your reports or the underlying database SQL code content. Results are exported to Excel with customizable column selections.	**XLSX**
4	Generate detailed content documentation for my reports	*Document -> Business Intelligence -> Report Definition*	Automatically generate detailed report documentation for your entire report library in a consistent layout and format. Complete report specifications in a standard format are exported in your choice of HTML or TXT format. Create a single file for each report processed, or export all results into file with page-breaks for each report.	**HTML** **TXT**
5	Extract all SQL code used in my reports	*Document -> Business Intelligence -> Show SQL Queries*	Extract all SQL statements embedded within your reports, including run-time derived SQL commands and table joins from a visual drag-and-drop designer. Export documentation to your choice of HTML or TXT format. Create a single file for each report processed, or export all results into file with page-breaks for each report.	**HTML** **TXT**
6	Create a database cross-reference for my reports	*Document -> Business Intelligence -> Column Cross-Reference*	Create a complete database cross-reference for all of your reports. List tables and database fields used within your reports by location (where used/referenced). Results are exported to Excel with customizable column selections.	**XLSX**
7	List all my reports, including printer and update information	*Document -> Business Intelligence -> Report Listing*	Create a real-time list of all of your reports, including author information, last updated, where located, etc. Results are exported to Excel with customizable column selections.	**XLSX**
8	List the schedule for my reports inside an SAP BOE or Crystal Server Repository	*Document -> SAP BOE / Crystal Server -> Report Schedules*	Create a real-time list of all Crystal Report schedules within your SAP BOE or Crystal Server repository, including deliver to, output format, schedule frequency, data or event triggers, report parameters and more. Results are exported to Excel with customizable column selections.	**XLSX**
9	List the security for my reports inside an SAP BOE or Crystal Server Repository	*Document -> SAP BOE / Crystal Server -> Security Listing*	Create a real-time list of Crystal Report security access for all schedules and reports located within your SAP BOE or Crystal Server. Results are exported to Excel with customizable column selections.	**XLSX**
0	List the schedule for my reports inside a SQL Server Reporting Services (SSRS) database	*Document -> SQL Reporting Services -> Report Schedules*	Create a real-time list of all Crystal Report schedules within your SQL Server Reporting Services database, including deliver to, output format, schedule frequency, data or event triggers, report parameters and more. Results are exported to Excel with customizable column selections.	**XLSX**

#	Wizard	Menu Shortcut	Use Case / Document Produced	Sample Documents
	Replace Crystal Report data source connections or qualified table names	*Replace -> Crystal Reports -> Data source connections or qualified table names*	Mass change the data source connections for a set of Crystal Reports. This is useful whenever you are migrating reports between development->test->production host environments, a database is moved to a new server, a database name has changed, the database type has changed or you want to change the data source connection type (for example you want to switch from ODBC to OLE DB connection or vice-versa). Output can over-write the original source files or be written to a new target folder (recommended).	
12	Replace the username, password, server or database of my Reports in an SAP BOE or Crystal Server repository	*Replace -> Crystal Reports -> BOE BI Database logon information*	Mass change Crystal Report database login (authorization) information on a set of schedules within an SAP BOE or Crystal Server. Useful to change a large set of schedules rather then having to change each report schedule individually through the Crystal Management Console. Output can over-write the original source files or be written to a new target folder within the repository (recommended).	

Show Wizards on Start-up

At the bottom, left corner of the **Wizards** dialog box there is a **Show on Startup** check-box. Click to un-check this item to prevent the **Search Wizard** from launching automatically each time you start the program.

> ## See Also:
> - "Perform a Regular Search" on page 109
> - "Apply File Filter" on page 140
> - "Use the Expression Builder" on page 115
> - "Work With Search Results" on page 171
> - "Search Within Result Documents" on page 182
> - "Projects" on page 125

Search Wizard

This section takes you through each step required to use the **Search Wizard**: launch the wizard (two ways), create or select a project, select file types to include, select file location(s), enter connection information, enter search criteria and start the search, and enter connection information and update reports.

Launch the Search Wizard
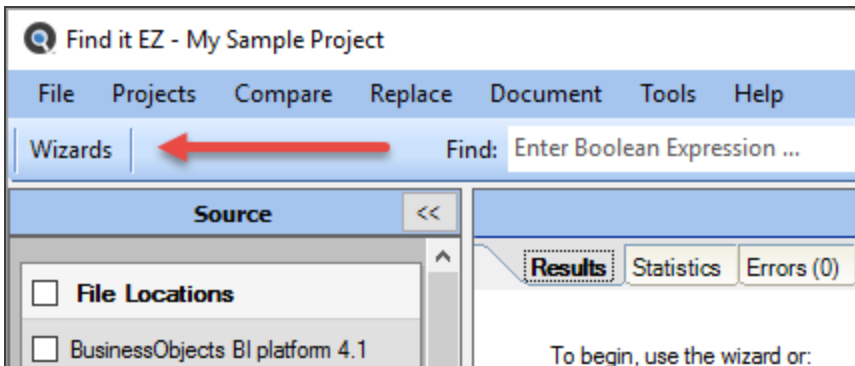
The **Search Wizard** is launched only via the Wizards button (i.e. this wizard cannot be accessed via the menu), as follows:

Click to choose the **Search Wizard** option:

- Option 1: **Search for a specific database object, code snippet, or variable to find any reference throughout all of my source code (including within reports and databases)**
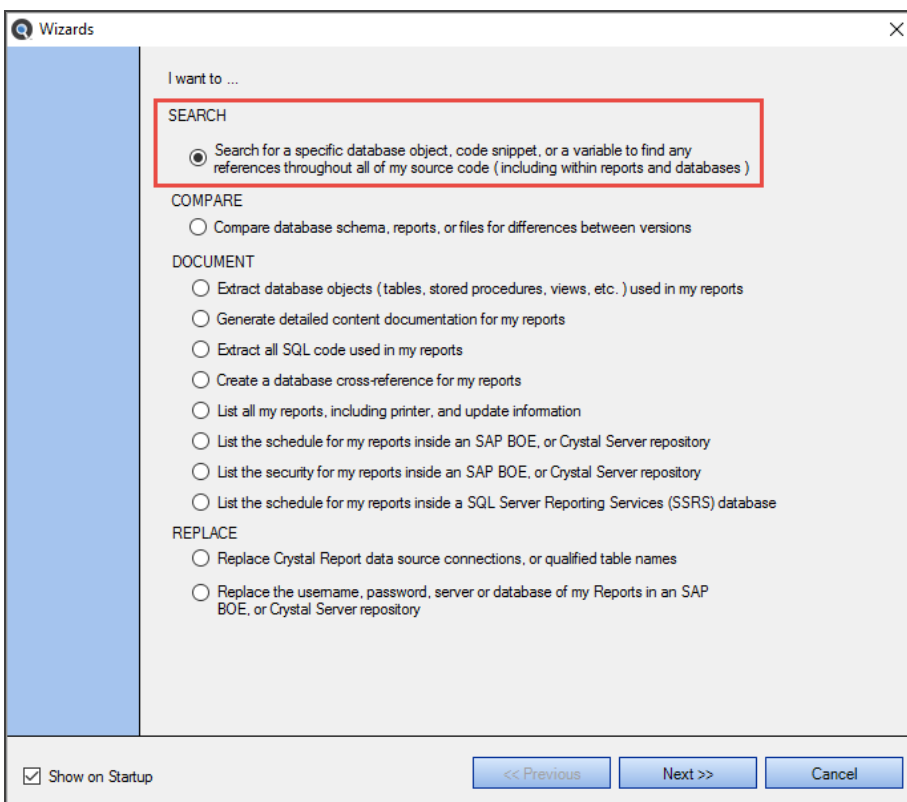
Click on the Next >> button to continue.

The **Search Wizard** will open.

Create or Select a Project

Projects are used to group and save search settings, filters, and directories between sessions.

1. After you "Launch the Search Wizard" on the previous page., the following dialog will appear:

2. To use an existing project for your search:
   a. Click to choose the **Use an existing Project** option (selected by default).
   b. From the project drop-down list, click to select the name of the existing project (i.e. settings) you would like to use for your search.

3. To create a new project for your search:
   a. Click to choose the **Create a new Project** option.
   b. In the project text box, enter the name of the new project.

4. To use pre-indexed documents for this search, click to check the Use pre-indexed documents check-box.

   > **Tip:** Whenever possible, using pre-indexed documents will drastically improve search performance.

5. Click on the Next >> button to continue.

Select File Types to Include

A number of **Wizard** options include this dialog. See example below:

> **Note:** The **Show More** link located to the right of the list below, when clicked, auto refreshes the list of available items to include the "hidden" but available source items. When a "hidden" item is checked, it will become visible going forward on the **Source** panel on the main screen and automatically be included in your project settings.
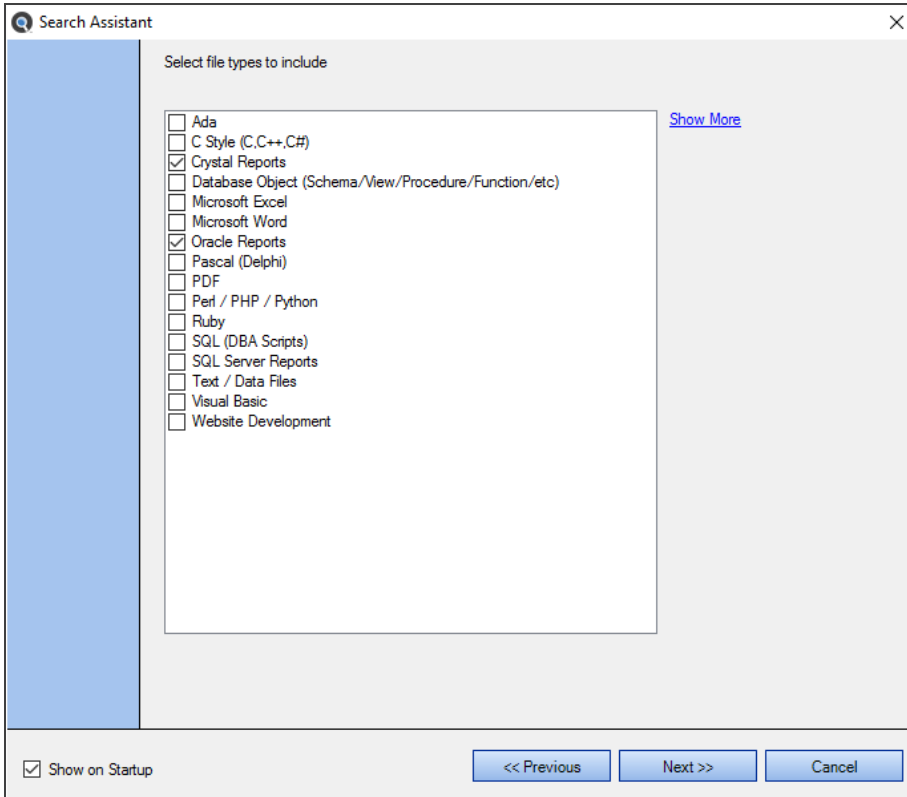
1. In the **Select file types to include** list, click to select (i.e. check) the check-box preceding each file type you want to include in your search. See note above re: **Show More**.

2. Click on the Next >> button to continue.

> **Note:** To go back to the **Search Wizard** options, click on the << Previous button.

Select File Location(s)

A number of **Search Wizard** options include this dialog box. See example below:

> **Note:** The **Show More** link located to the right of the lists below, when clicked, auto refreshes the list of available items to include the "hidden" but available source items. When a "hidden" item is checked, it will become visible going forward on the **Source** panel on the main screen and automatically be included in your project settings.
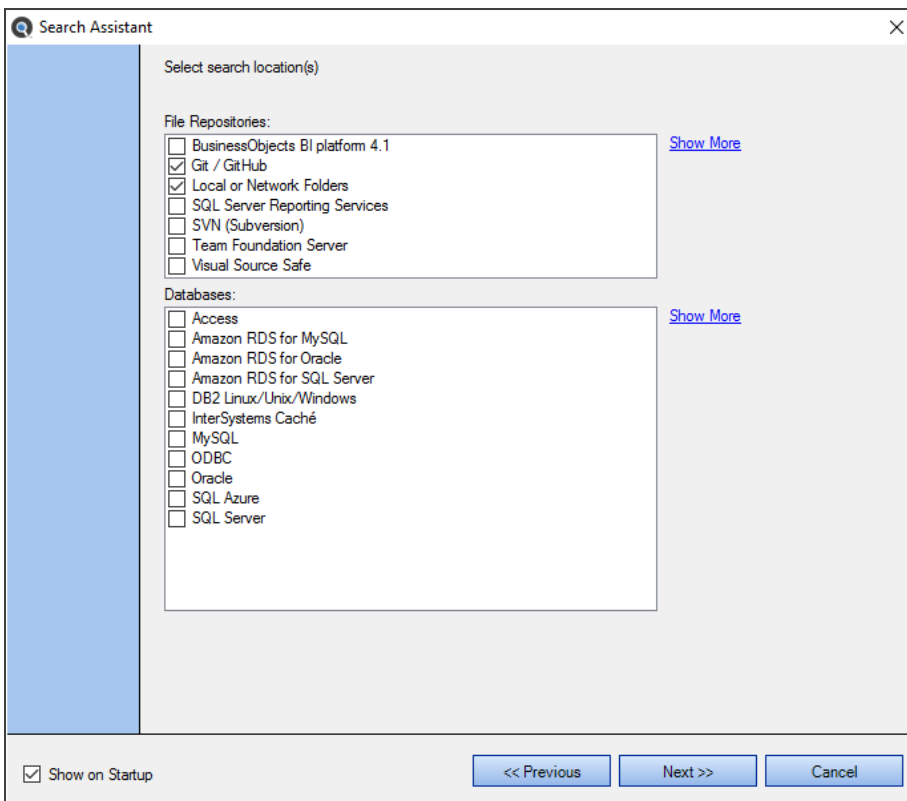
1. In the **File Locations** list, click to select the storage areas within which you want to search.

2. In the **Databases** list, click to select the source database(s) within which you want to search.

3. Click on the Next >> button to continue.

> **Note:** To go back to the previous step, click on the << Previous button.

Enter Connection Information

The following example is for SQL Server Reporting Services (SSRS) connection information.

1. On the **Options** tab (selected by default), enter the connection information for the selected source.

2. To test the connection, click on the Test Connection button.

3. To apply a report filter, click on the **Report Filter** tab and see links below.

4. To continue, click on the Next >> button.

Enter Search Criteria and Start Search

This dialog is the final step in the **Search Wizard**. See below:

1. From the **Search Type** drop-down list, click to select one of the following options:

   • **Boolean** (can include wildcards)

2. In the **Find** text box, enter the desired search expression.

   > **Tip:** Click on the **More Information** link. Enter a word or phrase. Or, to use supported Boolean operators: OR, AND, and NOT, search terms must be enclosed in curly brackets. For example: {Order} AND {By}.

   • To view or select from a list of recent search expressions, click on the field to view a drop-down list and click to select the desired search expression.

   • To perform a search using the **Boolean Search Builder**, click on the Expression Builder button. Refer to the See Also links below.

3. In the **Content Filters** section, click to select the desired filters:

   • **Exact Match** - exact word match for Boolean search. When enabled, matching will be attempted within each individual word, not across words, and is case-insensitive. If disabled (default), for Boolean, this would essentially behave like a wildcard (partial word) match.

   • **Case Sensitive** - match case of expression.

   • **Include Comments** - default is disabled to reduce false-positive matches. When enabled, comments are searched.

   • **Comments Only** - – default is disabled. When enabled, "include comments" is automatically enabled and ONLY comments are searched.

4. To launch the search, click on the Start Search button. A **Searching ...** dialog will appear. See example below:
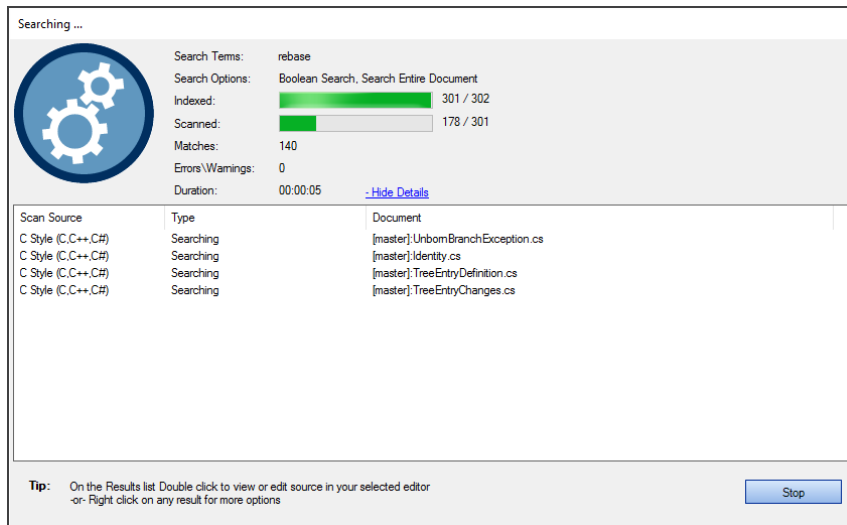
5. To stop the search, click on the Stop button.

6. Once the search is complete, any results matching your search criteria will appear in the **Results** window.

> **See Also:**
>
> - "Show or Hide Source Items" on page 49
> - "Perform a Regular Search" on page 109
> - "Use the Expression Builder" on page 115
> - "Local or Network Folders" on page 131
> - "Repositories" on page 143
> - "Databases" on page 150
> - "Apply File Filter" on page 140
> - "Apply Report Filter" on page 147
> - "Projects" on page 125
> - "Use Pre-Indexed Documents" on page 112

Compare Wizard

This section takes you through each step required to use the **Compare Wizard**: launch the wizard (two ways), choose compare source and target, update index for compare, select documents to compare, view compare results summary, and view compare results detail.

Launch the Compare Wizard

The **Compare Wizard** can be launched via the **Wizards** dialog or via the menu. See below:

1. Launch the **Compare Wizard** via the **Wizards** dialog:

   a. Click on the Wizards button on the search bar.
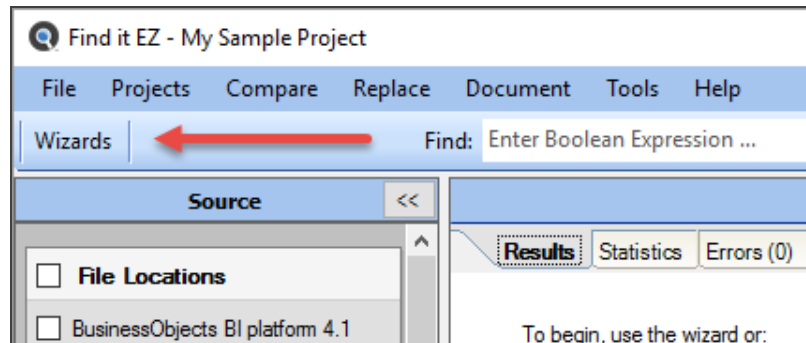
   b. Click to choose the following **Wizard** option:

      • Option 2: **Compare database schema, reports or files for differences between versions**
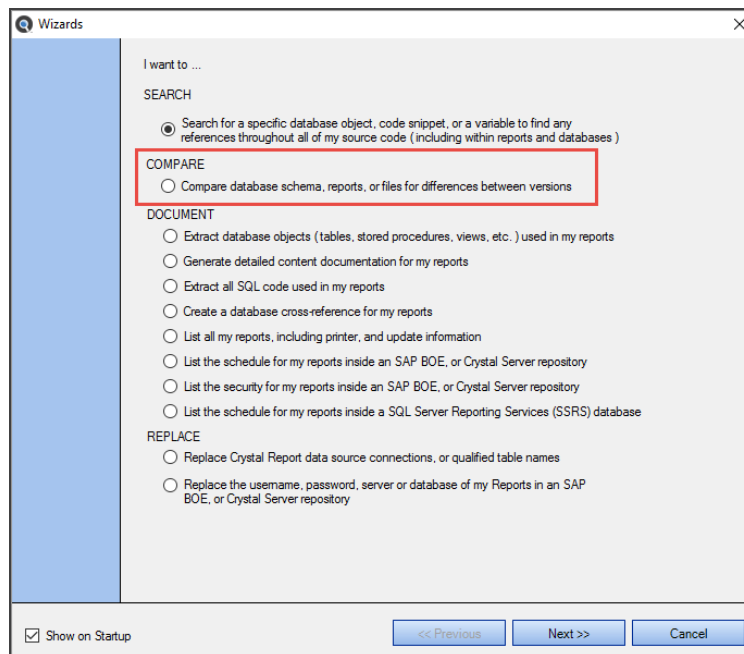
OR

2. Launch the **Compare Wizard** via the menu:

   • From the Find it EZ menu, select **Compare -> Documents, Reports & Databases**
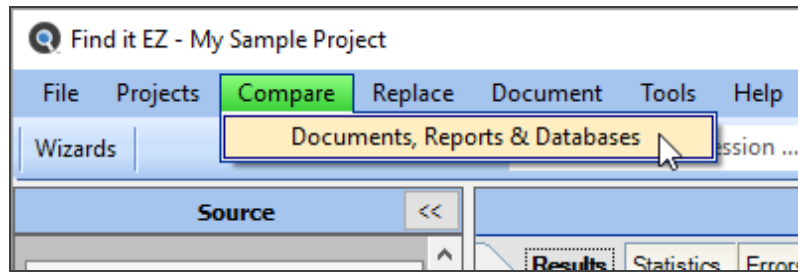
3. The **Compare Wizard** will open.

Choose Compare Source and Target
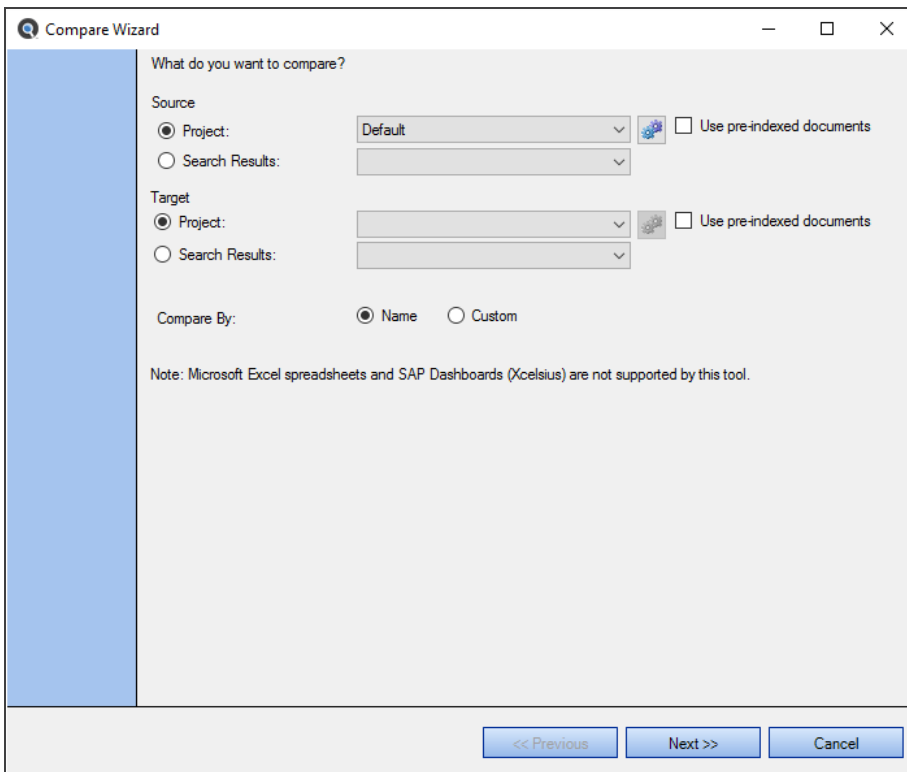
> **Note:** Microsoft Excel spreadsheets and SAP Dashboards (Xcelcius) are not supported by this tool.

1. To compare a project:

   a. In the **Source** or **Target** section, choose the **Project** option.

      > **Tip:** You may compare different files within a Project by selecting the same **Source** and **Target** along with a Custom **Compare By** option.

b. From the project drop-down list, click to select the name of the project you want to compare.

c. To change settings for the selected project, click on the corresponding gears icon.

d. If desired, click to check the **Use pre-indexed documents** check-box.

> **Note:** Use of pre-indexed documents will improve performance. However, the documents compared may not be the latest content as the index will not be refreshed to check for any updates prior to executing the comparison of project files previously indexed.

2. To compare search results:

a. In the **Source** or **Target** section, choose the **Search Results** option.

b. From the search results drop-down list, click to select the desired search results. Note the date and time.

3. In the **Compare By** section, click to choose one of the following methods of comparison:

- **Name** - automatically matches documents by name within identical **Source** and **Target** sub-folder path or database.

- **Custom** - allows selection of **Source** and **Target** document pairs. Use this option to compare the contents of files with different filenames or contents of completely different file types (e.g. a database procedure to a SQL script file, for example).

4. To continue, click on the Next >> button.

Update Index for Compare

Once you choose the compare source and target and click on the Next >> button, the index begins updating. See example below:
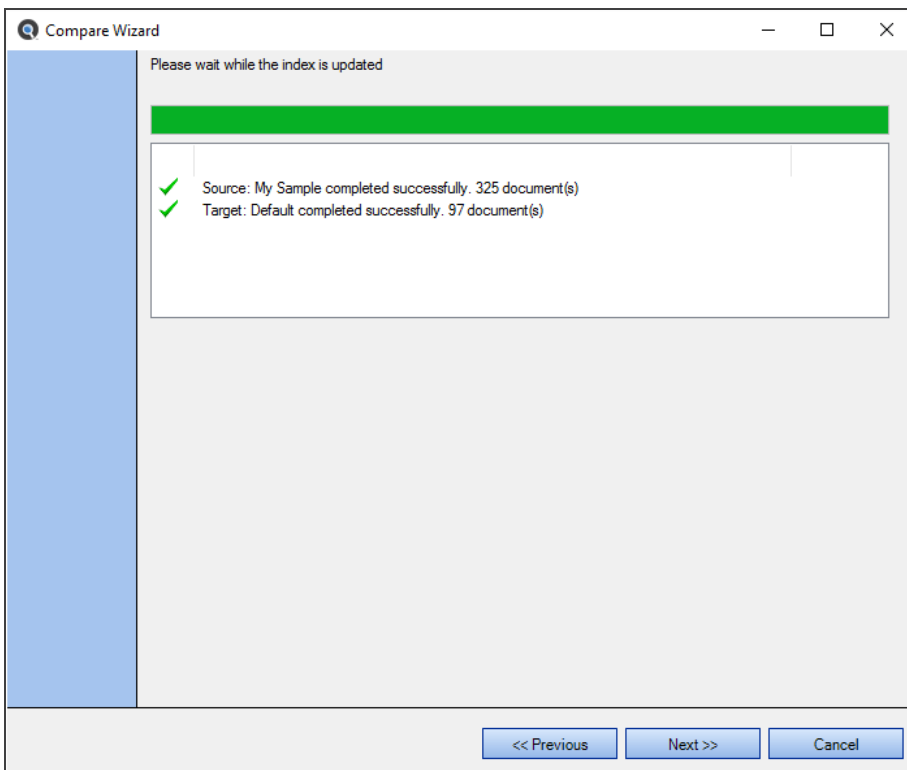
The next example contains some errors:
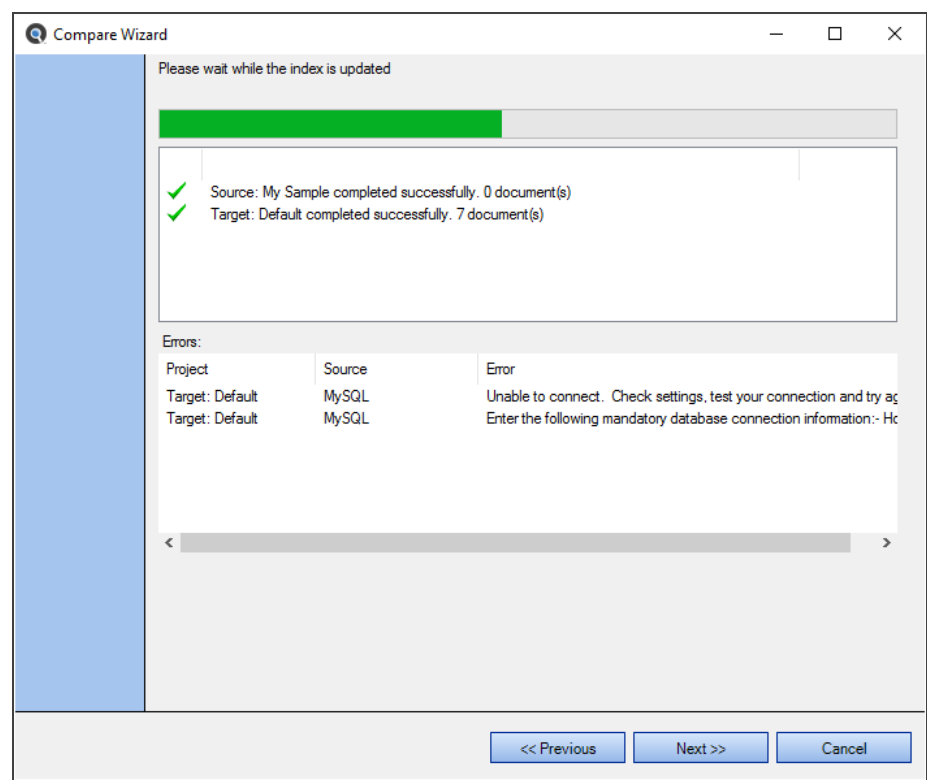
Use the horizontal scroll bar to view details of any errors, then correct any issues.

Once the index update is complete, click on the Next >> button to continue.

Select Documents to Compare

After selecting the source and target and then allowing the index to update, you will be prompted to select the types of documents to be compared. You may optionally select a specific subset of individual documents by name. See example below:
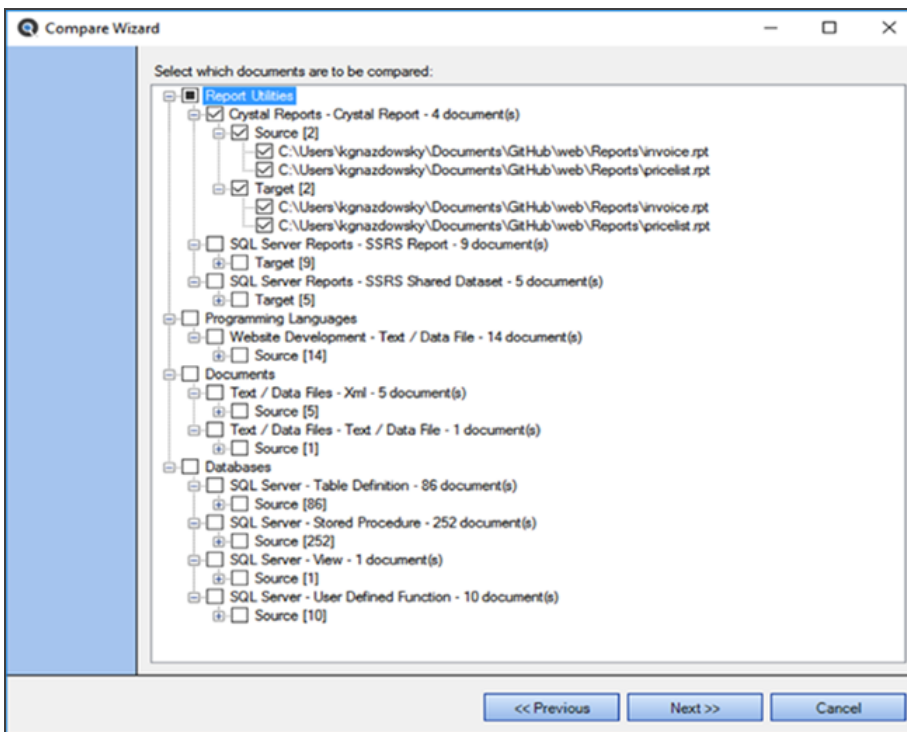
Note: If subset, but not all items are selected in a branch, a solid box will display:

Click to check a category to 'select all' for a category. Or, click on the '+' to expand a document type and click to check the desired documents for comparison.

If you selected the **Compare By Custom** file mapping option on the main **Compare Wizard** dialog, you will be prompted to map each desired source and target document pairing to compare.

There are two options:

First, you can "auto map" by name by clicking on the Auto map all by name button. See example result below:
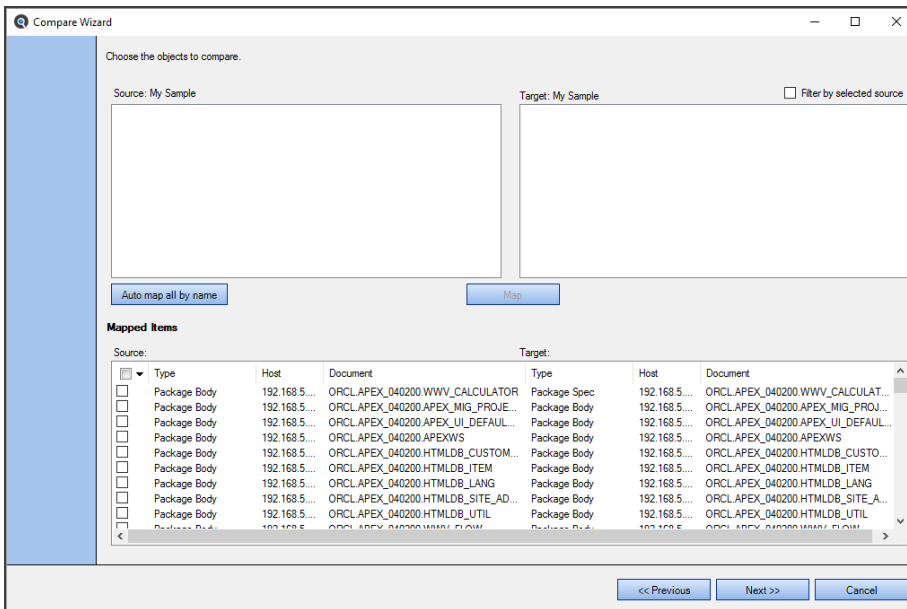
Note that all **Source** and **Target** items have been moved to the **Mapped** Items list.

Second, you can select a source and target file to "map" for comparison of contents, as follows:

> **Note:** This allows you to compare two files in different source & target paths or two files of different type or name, etc. When mapping individual documents, you can check the **Filter by selected source** to return a subset of likely target documents to compare based on a "fuzzy match" algorithm. This reduces the amount of target documents to scan through.

1. Click to select and highlight the desired item in the **Source** list.
2. Click to select and highlight the desired item in the **Target** list. This will enable the Map button.
3. Click on the Map button. See example below:
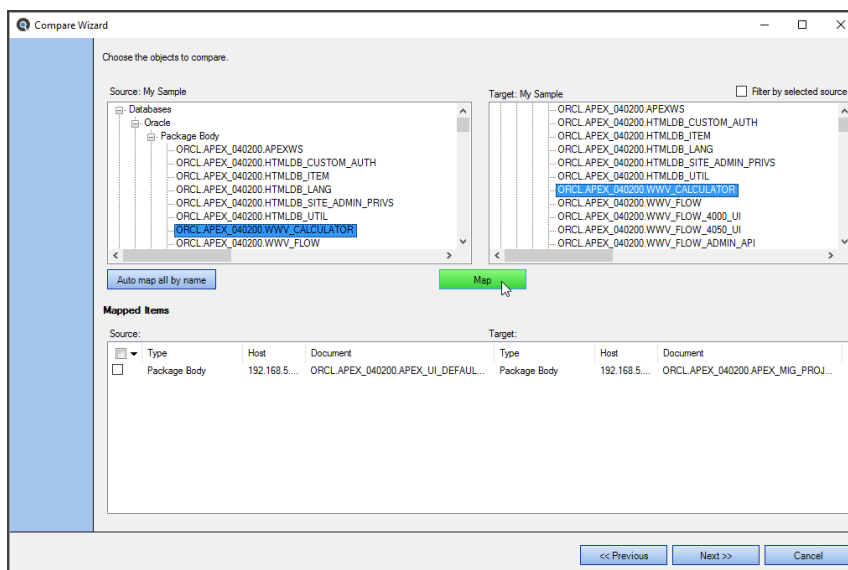
4. As each document from the **Source** and **Target** lists are included in a mapping pair for comparison, they are removed from the top two respective lists, and added to the **Mapped Items** list at the bottom. See example below:
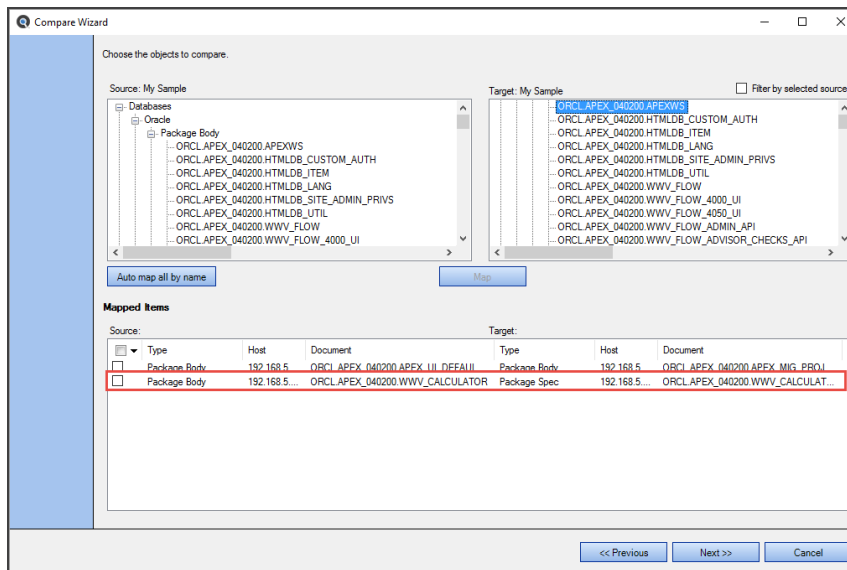
Note: Once one or more documents are "mapped" to be compared, there is a context menu on the left that allows you to select and remove one or more mapped documents. Click on the down arrow to view. See example below:
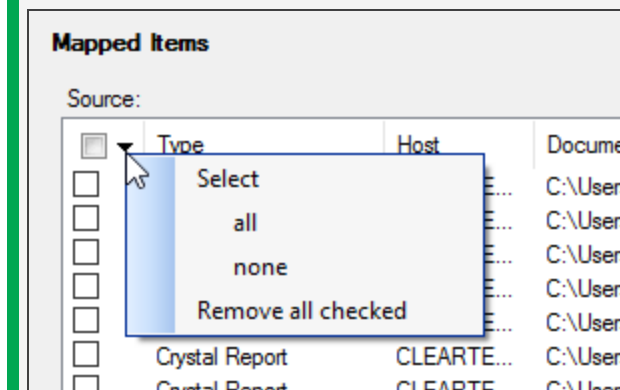
5. After mapping all document pairs to be compared, click on the Next >> button to continue. This takes you to the **Compare Wizard** summary dialog.

View Compare Results Summary

Once the compare is complete, the following summary will appear. See example below:
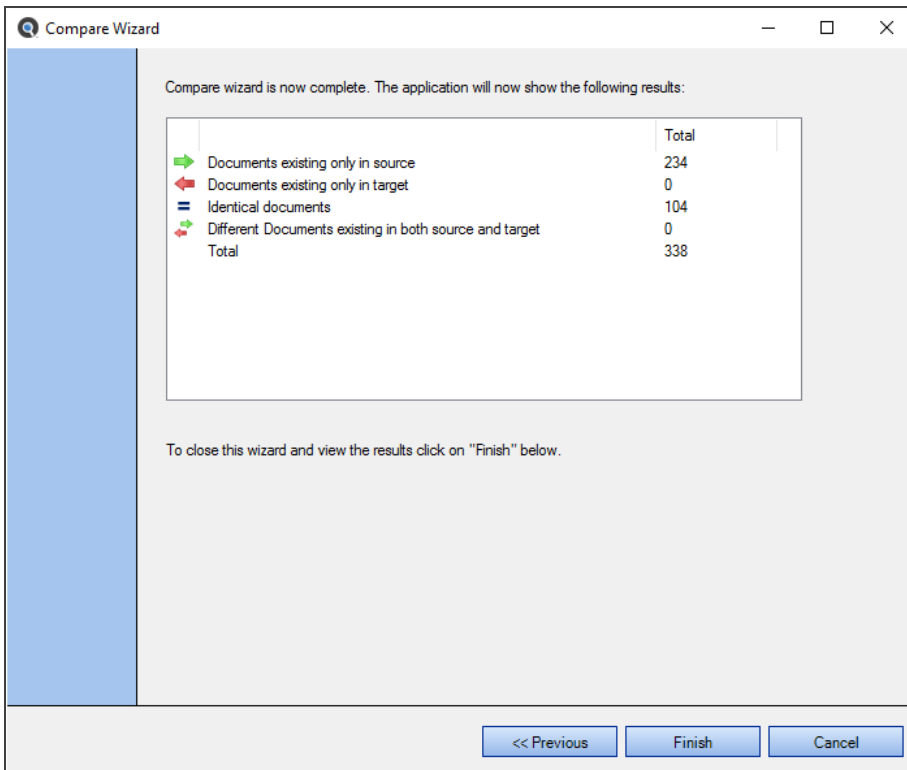
To close the **Compare Wizard** and view the results in the **Results** window, click on the `Finish` button.

> ### See Also:
>
> - "File Locations and Source Settings" on page 129
> - "Use Pre-Indexed Documents" on page 112
> - "View Compare Results Detail" below

Compare Files, Reports, and Databases

Refer to this section for step-by-step instructions required to start or modify a comparison, show differences, filter/search/export compare results, view compare result details, expand/collapse compare results, compare status colours, find in source or target, show differences only, export compare details, and copy or print compare results.

Comparing database schema, report files, programming language code files, or documents is an effective way to quickly pinpoint differences/changes between environments or releases. This is particularly effective when assessing the impact of changes to a vendor supplied new release by simply comparing your current production environment to the new release deployed to a staging environment, for example. Compare identifies all files or database objects with differences and includes the ability to drill down and view these differences with side-by-side colour highlighting of line-by-line contents.

View Compare Results Detail

After completing a comparison using the **Compare Wizard** and viewing the results summary, click on the `Finish` button to view the **Comparison Results** window. See example below:
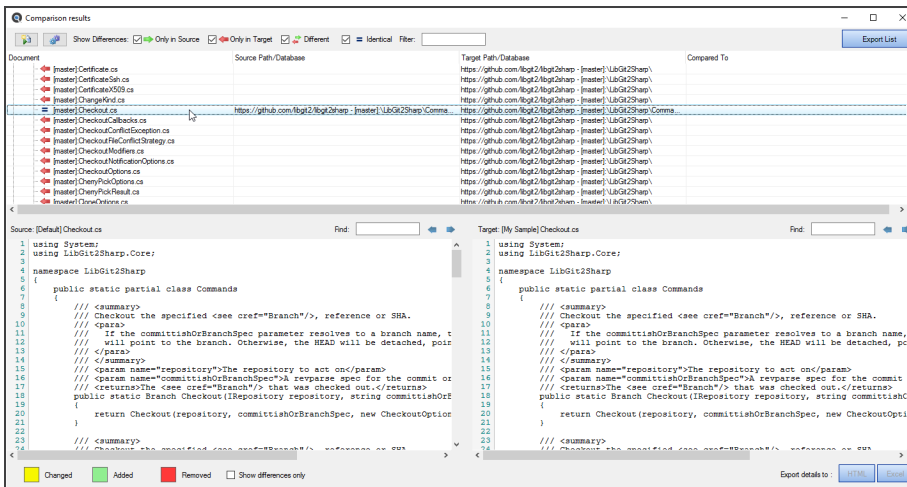
Start New Compare

> **Alert:** The following procedures will remove all compare results. Export or save any details you wish to keep before starting a new compare.

To start a new comparison, you may either use the **Compare** menu or click on the [button] button located in the upper, left corner of the **Comparison Results** window.
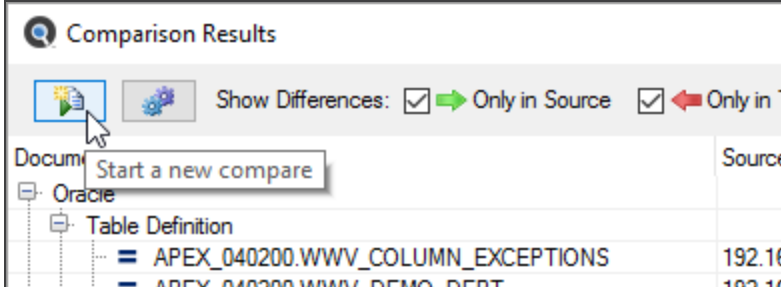
You will be returned to the beginning of the **Compare Wizard** to start a new comparison.

Modify Current Compare

If you wish to simply change the set of files that were included in your latest set of comparison results, you can quickly do so by restarting mid-way through the Compare Wizard . To do so, in the upper, left corner of the **Comparison Results** window, click on the [button] button.
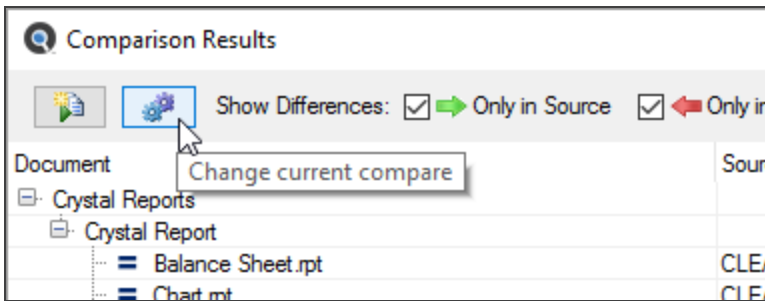
You will be returned to the **Compare Wizard** document selection dialog window to allow you to change the set of documents you want to compare.

Filter Compare Results List

At the top of the **Comparison Results** window, there are a number of **Show Differences** view filters available. See below:

Once a ompare wizard has been completed, a list of results are presented on the **Comparison Results** dialog with the screen split into a summarized list view on top, and a detail view displayed on the bottom whenever a list item is selected. The results are grouped by document and document type within the list view. To expand or collapse a result group, click on the '+' or '-' button, respectively.

Click on any item in the list to drill down and view content of the item in the "diff viewer" below. You may locate an item within the list by using two available list filter options:

Click to check the desired check-box to view that selection. The first three filters are checked by default. Click to un-check any as desired:

1. Click to check the desired check-box to view that list of corresponding documents following the **Source** vs **Target** comparison. The first three filters are checked by default. Click to un-check or check any as desired:

    - **Only in Source** - list of files that only exist in the **Source** project set. No corresponding file or database object exists in the **Target** set, potentially indicating an item has been added in the **Source** project.
    - **Only in Target** - list of files that only exist in the **Target** project set. No corresponding file or database object exists in the **Source**, potentially indicating an item has been removed from the **Source** project.
    - **Different** - list of files or database objects that contain differences within their content. Indicates that this set of files have changed when comparing **Source** to **Target** copies.
    - **Identical** - list of files or database objects that contain NO differences within their content. Indicates that this set of files have NOT changed when comparing **Source** to **Target** copies.

2. As you type text into the **Filter** text box, the displayed list items are automatically restricted to show documents that contain the text within the file or database object name. For example, you may type the text "Customer" to only list a subset of items containing the word "Customer" within the file or database object name.

> **Tip:** Use of these filters is also applied to restrict the items included in an export list.

Export Compare Results List

1. Use the list check boxes to filter the list of documents you would like to export. Only selected (checked) items will be included.

2. At the top of the **Comparison Results** window, locate and click on the Export List button. A **Save As** dialog will appear.
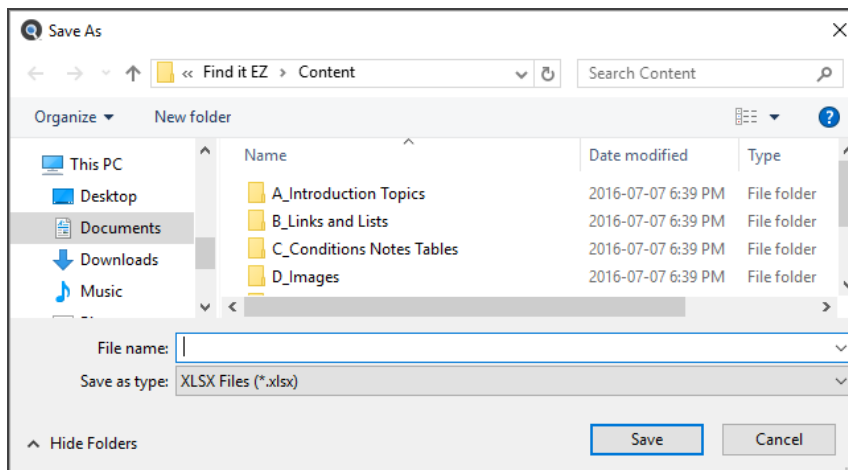
3. Enter a **File name**.

4. Click on the Save button.

> Note: The list will be saved in *.xlsx file format.

5. The saved list will open automatically with the selected viewer/editor.

6. The following data will be included in the exported file:

   - **Source**, **Target**, and **Date Compared** - a summary of when and what set of documents were compared.
   - **Comparison Results** - for each document included in the exported set, this will indicate one of four possible results: the file was found in the source set only, target set only, found in both and had differences, or contents were identical.
   - **Source Document Type**
   - **Source Host**
   - **Source File Path or Database**
   - **Source Document**
   - **Target Document Type**
   - **Target Host**
   - **Target File Path or Database**
   - **Target Document**

7. Save the file as desired.

Work with Compare Wizard Details

When a list item containing differences is selected from the list above, the actual lines and type of differences that exist between the source and target content are highlighted using the appropriate colour. The side-by-side differences viewer will auto-scroll both source and target contents to show changes between the two documents in full context.

To eliminate the need to scroll through the entire content of documents and show lines with differences only, simply click to check the **Show differences only** check-box.

> **Tip:** Use of the **Show difference only** filter is also applied to restrict the items included when exporting details to an XSLS or HTML document.
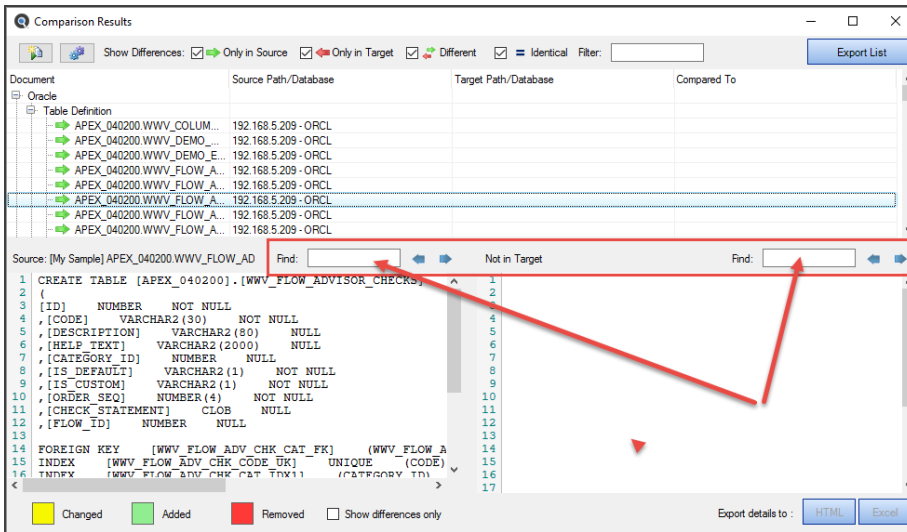
At the bottom of the **Comparison Results** window, there is a result status colour key. See below:

Differences between the source and target content are highlighted in the above colours.

To show differences only, click to check the **Show differences only** check-box.

To search for specific text within either the source or target viewer:

1. At the top of the **Source** or **Target** window, locate the **Find** text box.
2. Enter the desired filter/search text into the text box.
3. Click on the right arrow button to find next or the left arrow button to find previous. Content matching your search criteria will be highlighted in purple.
4. Repeat to view all instances matching your search criteria.

Export Compare Details

You may export the color highlighted contents of the side-by-side differences viewer to ether an HTML or XLSX file format.

At the bottom right of the **Comparison Results** window, locate and click on either the **HTML** or Excel button. Source and target details will open in the selected editor. Save as desired.

Copy or Print Compare Results

Select All Source or Target Compare Results

1. In the compare results list at the top, click to highlight the document for which you want to view details. Details will appear in the **Source** and **Target** boxes at the bottom.

2. In the **Source** or **Target** box, right-click on the compare result details. A context menu will appear.

```
1   CREATE TABLE [APEX_040200].[WWV_FLOW_ADVISOR_CHECKS]
2   (
3   [ID]        NUMBER      NOT NULL
4   ,[CODE]      VARCHAR2(30)     NOT NULL
5   ,[DESCRIPTION]     VARCHAR2(80)     NULL
6   ,[HELP_TEXT]     VARCHAR2(2000)     NULL
7   ,[CATEGORY_ID]       NUMBER        NULL
8   ,[IS_DEFAULT]      VARCHAR2    Select All
9   ,[IS_CUSTOM]     VARCHAR2 (
10  ,[ORDER_SEQ]      NUMBER(4)     Copy
11  ,[CHECK_STATEMENT]     CLO     Print
12  ,[FLOW_ID]      NUMBER     NULL
13
14  FOREIGN KEY     [WWV_FLOW_ADV_CHK_CAT_FK]     (WWV_FLOW_ADV_CHK_CAT_FK)     REFERENCES
15  INDEX     [WWV_FLOW_ADV_CHK_CODE_UK]     UNIQUE     (CODE)
16  INDEX     [WWV_FLOW_ADV_CHK_CAT_IDX1]     (CATEGORY_ID)
17  INDEX     [WWV_FLOW_ADV_CHK_PK]     UNIQUE     (ID)
18  CONSTRAINT     [SYS_C008041]     CHECK     [CODE] IS NOT NULL
19  CONSTRAINT     [SYS_C008042]     CHECK     [IS_DEFAULT] IS NOT NULL
20  CONSTRAINT     [SYS_C008043]     CHECK     [IS_CUSTOM] IS NOT NULL
21  CONSTRAINT     [SYS_C008044]     CHECK     [ORDER_SEQ] IS NOT NULL
22  CONSTRAINT     [WWV_FLOW_ADV_CHK_CODE_CK]     CHECK     upper(code)=code
23  CONSTRAINT     [WWV_FLOW_ADV_CHK_IS_DEFAULT_CK]     CHECK     is_default in ('Y', 'N'
24  CONSTRAINT     [WWV_FLOW_ADV_CHK_IS_CUSTOM_CK]     CHECK     is_custom in ('Y', 'N')
```

3. From the context menu, choose **Select All** . All details in the current box will be highlighted.

Copy Source or Target Compare Results

1. In the compare results list at the top, click to highlight the document for which you want to view details. Details will appear in the **Source** and **Target** boxes at the bottom.

2. In the **Source** or **Target** box, select the text you want to copy.

```
IK_CODE_UK]     UNIQUE     (CODE)
IK_CAT_IDX1]    (CATEGORY_ID)
IK_PK]     UNIQUE     (ID)
[1]     CHECK     [CODE] IS NOT NULL
[2]     CHECK     [IS_DEFAULT] IS NOT NULL
[3]     CHECK     [IS_CUSTOM] IS NOT NULL
[4]     CHECK     [ORDER_SEQ] IS NOT NULL
ADV_CHK_CODE_CK]     CHECK     upper(code)=
ADV_CHK_IS_DEFAULT_CK]     CHECK     is def
```
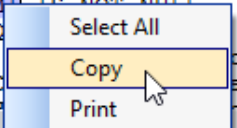
3. Right-click on the compare result details. A context menu will appear.

```
CHK_CODE_UK]     UNIQUE     (CODE)
CHK_CAT_IDX1]    (CATEGORY_ID)
CHK_PK]     UNIQUE     (ID)
041]     CHECK     [CODE] IS NOT NULL
042]     CHECK     [IS_DEFAULT] IS NOT NULL
043]     CHECK     [IS_CUSTOM] IS NOT NULL
044]     CHECK     [ORDER_SEQ
ADV_CHK_CODE_CK]     CHECK          Select All          code
ADV_CHK_IS_DEFAULT_CK]     C          Copy          ault in ('Y',
ADV_CHK_IS_CUSTOM_CK]     CH          Print          m in ('Y' IN
```

4. From the context menu, select **Copy**. All highlighted details in the current box will be copied to the clipboard.
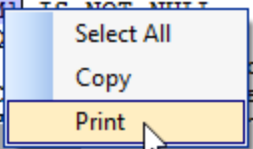
Save or Print Source or Target Compare Results

1. In the compare results list at the top, click to highlight the document for which you want to view details. Details will appear in the **Source** and **Target** boxes at the bottom.

2. In the **Source** or **Target** box, right-click on the compare result details. A context menu will appear.

```
_PK]     UNIQUE     (ID)
]     CHECK     [CODE] IS NOT NULL
]     CHECK     [IS_DEFAULT] IS NOT NULL
]     CHECK     [IS_CUSTOM] IS NOT NULL
]     CHECK     [ORDER_SEQ          Select All
V_CHK_CODE_CK]     CHECK          Copy          code
V_CHK_IS_DEFAULT_CK]     C          Print          ault in ('Y
V_CHK_IS_CUSTOM_CK]     CH          m in ('Y' IN
```

3. From the context menu, select **Print**. A **Save As** dialog will appear.
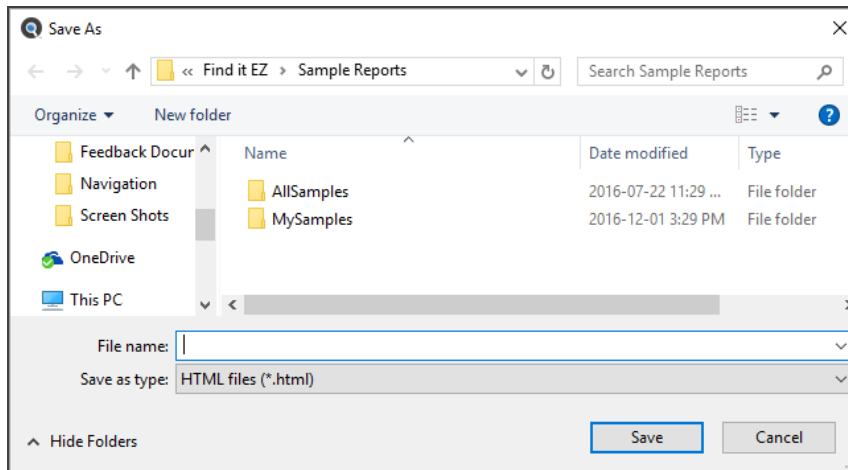
4. Enter a **File name** and click on the Save button. The document will open in a new browser tab.

5. Print as desired; press the (**Ctrl**)+(**P**) keys on your keyboard or use the **Print** menu or icon within your default browser.

Document Wizards

This section takes you through each step required to use the Document Wizards: launch the wizards (two ways), create or select a project, select file types to include, select file location(s), enter connection information, select recurrence and what to include, and choose report options and export report.

Launch a Document Wizard

The DOCUMENT Wizards can be launched via the Wizards button or via the menu. See below:

1. Launch a DOCUMENT wizard via the Wizards button:

   a. Click on the Wizards button in the main application window. See below:
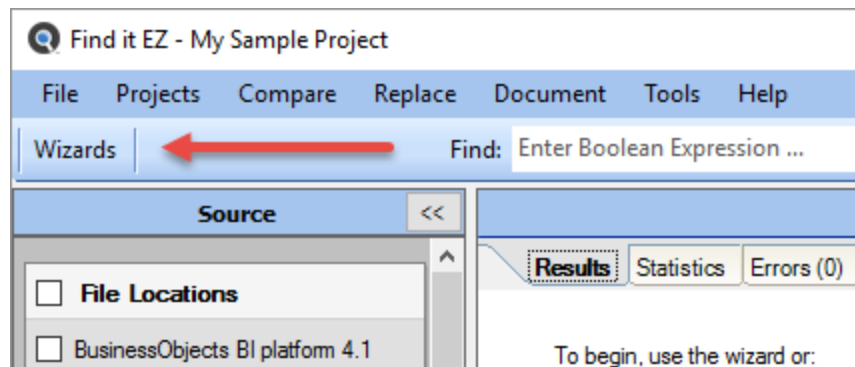
   b. Click to choose one of the following DOCUMENT Wizard options:

   - **Extract database objects (tables, stored procedures, views, etc.) used in my reports**
   - **Generate detailed content documentation for my reports**
   - **Extract all SQL code used in my reports**

- **Create a database cross-reference for my reports**
- **List all my reports, including printer and update information**
- **List the schedule for my reports inside an SAP BOE or Crystal Server repository**
- **List the security for my reports inside an SAP BOE or Crystal Server repository**
- **List the schedule for my reports inside an SSRS database**

OR

2. Launch a DOCUMENT Wizard via the Find it EZ menu:
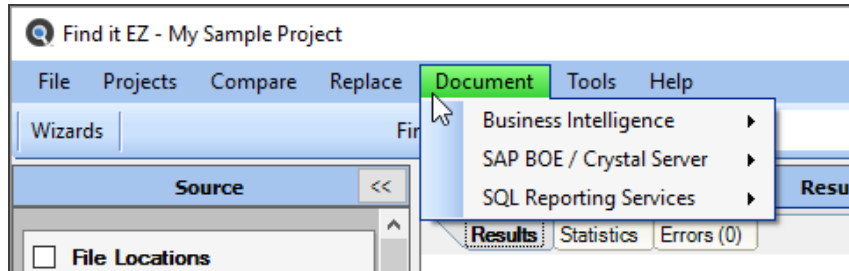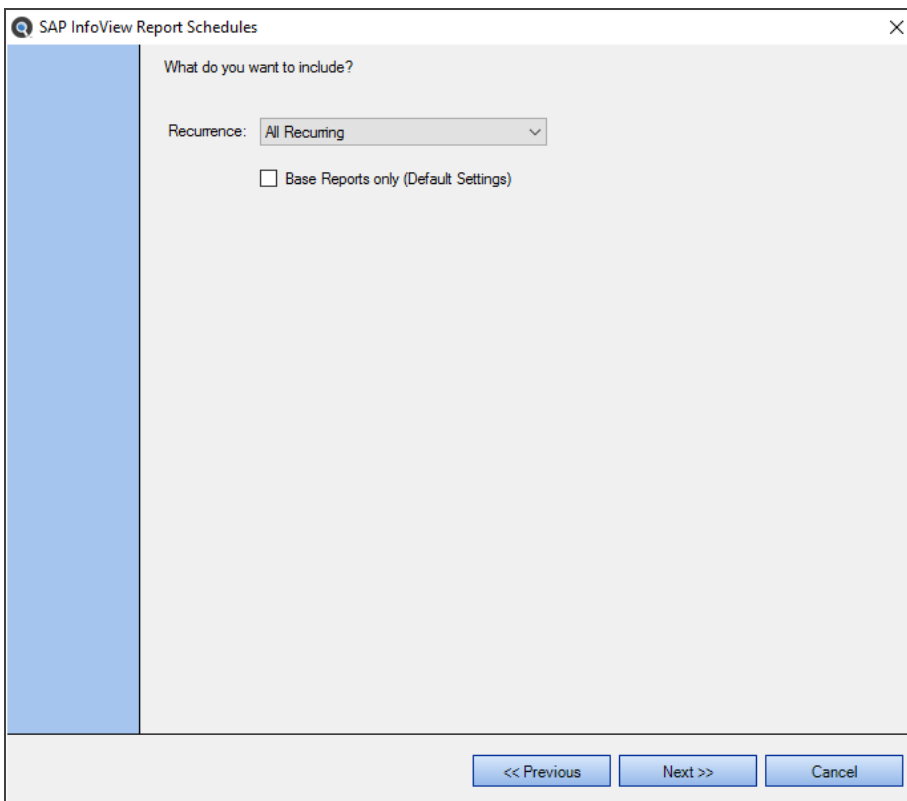
- Select **Reports -> Business Intelligence -> [Any Option]**
- Select *Document -> SAP BOE / Crystal Server -> [Any Option]*
- Select *Document -> SQL Reporting Services -> [Any Option]*

3. Click on the Next >> button to continue.

4. The selected DOCUMENT Wizard will open.

> **Note:** The following example is the DOCUMENT Wizard for Option 8, a BOE schedule listing. Most of the steps and dialog boxes presented in this example are virtually identical for the other Document Wizard options.

Select Recurrence and What to Include

> **Note:** Recurrence is only selected for option 8 of the Search Wizard; **List the schedule for my reports inside an SAP BOE or Crystal Server repository** (also accessed from the menu via *Document -> SAP BOE / Crystal Server -> Report Schedules*).

1. Click on the **Recurrence** drop-down. A list of options will appear, as below:
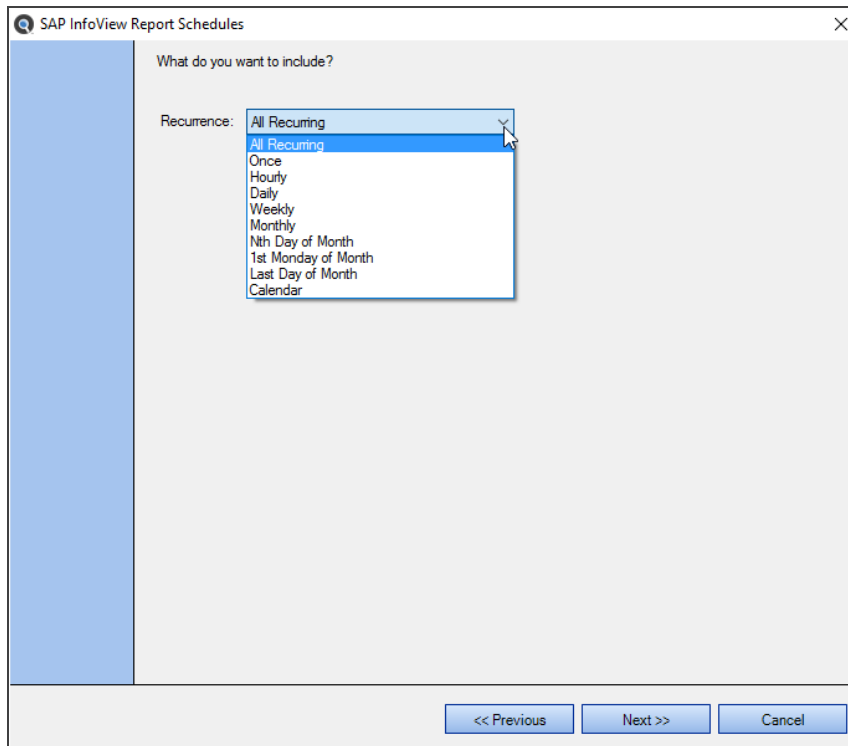
These are items that match up to selections in the BOE repository schedules.

2. Click to select the desired recurrence.

3. If you want to show the default settings, click to check the **Base Reports only** check-box.

> **Note:** Crystal reports has "Default Settings" and "Per Instance Settings." Default settings belong to the report itself (the base report) and then each time you schedule a report you can give the report its own schedule/settings. This allows you to just return the defaults as you may have a large number of one-time scheduled reports that will never be run again.

4. To continue, click on the Next >> button.

Choose Report Options and Export Report

The following dialog is used with the **Export Wizard**. See example below:
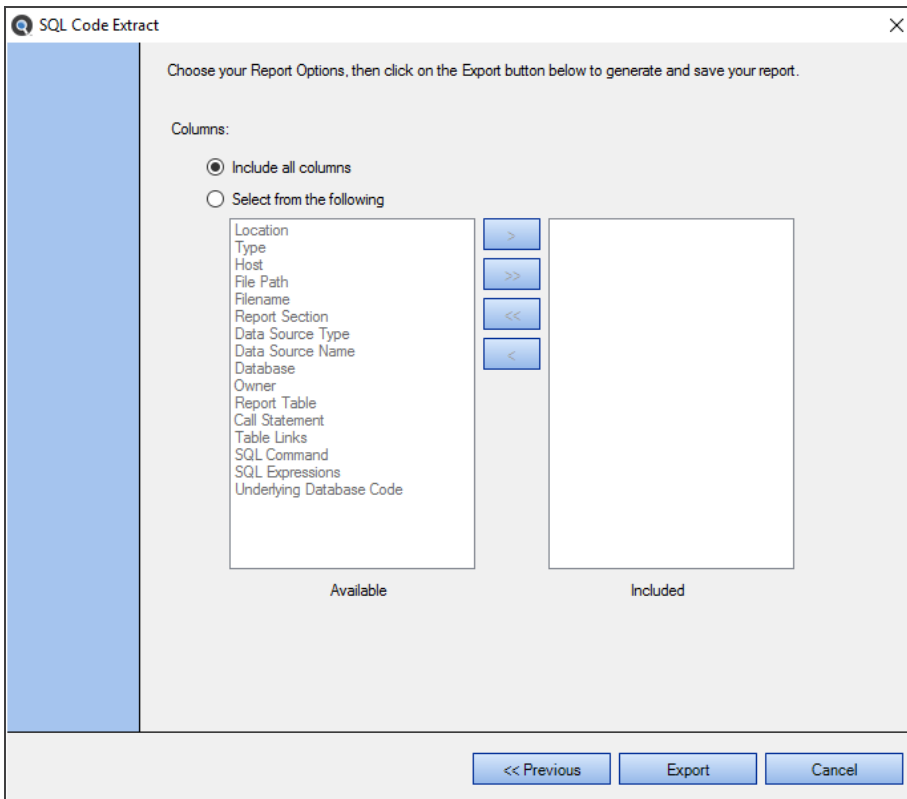
1. In the **Columns** section, choose to **Include all columns** or to **Select from the following**.

2. IF the second option is chosen:

   a. In the **Available** list, click to select the report column you want to include, then click on the `->` button to move the selected column to the **Included** list.

   b. To move all columns from the **Available** list to the **Included** list, click on the `->->` button.

   c. To remove all columns from the **Included** list, click on the `<<` button.

   d. To remove a single column from the **Included** list, click to select the report column you want to remove, then click on the `<` button.

3. Once complete, click on the `Export` button to generate and save your report. The Searching dialog will appear.

> **See Also:**
> - "Create a SQL Statements Detail Extract" on page 232
> - "Create a Database Cross-Reference List" on page 240

Replace Wizards

This section takes you through each step required to use the REPLACE Wizards: launch the wizard (two ways), select where to look for reports, enter connection information, select report destination folder, select report tables to change, choose new connection type, and confirm information and convert.

Launch the Replace Wizards

The REPLACE Wizards can be launched via the Wizards button or via the menu. See below:

1. Launch a REPLACE Wizard via the Wizards button:

   a. Click on the Wizards button in the main application window.
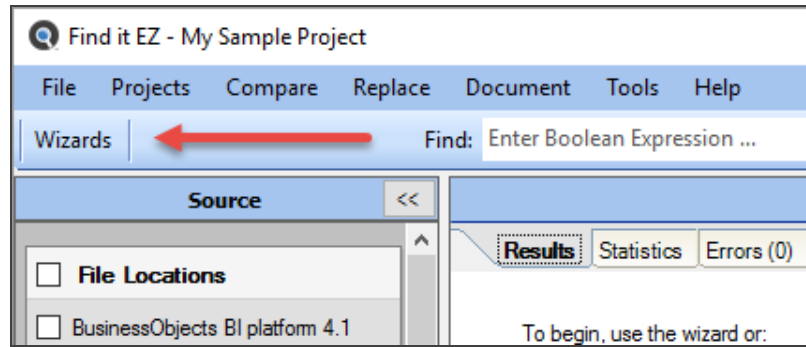
   b. Click to choose the following REPLACE Wizard option:

       • Option 11: **Replace Crystal Report data source connections or qualified table names**

       • Option 12: **Replace the login authentication of my reports or schedules within an SAP server**

   OR

2. Launch a REPLACE Wizard via the **Find it EZ** menu:
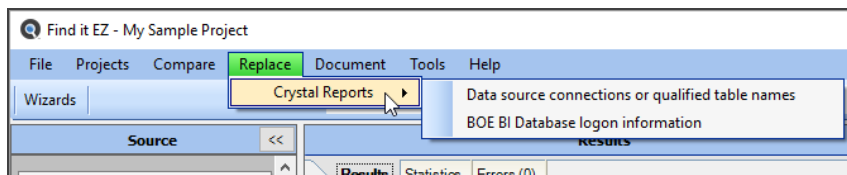
   a. Select **Replace -> Crystal Reports -> Data source connections or qualified table names**

   b. Select **Replace -> Crystal Reports -> BOE BI Database logon information**

3. The selected REPLACE Wizard will open.

Select Where to Look for Reports

1. Select where you want to look for reports:

   a. Choose **Local File System**.

      OR

   b. Choose **BusinessObjects BI Platform 41 Repository**.

2. Click on the corresponding project drop-down list and select the desired project.

3. If you have one or more search results selected, click to choose the **Use selected documents** option. This is a way of running the report with only a subset of items based on your last search.

4. To continue, click on the Next >> button.

Select Report Destination Folder
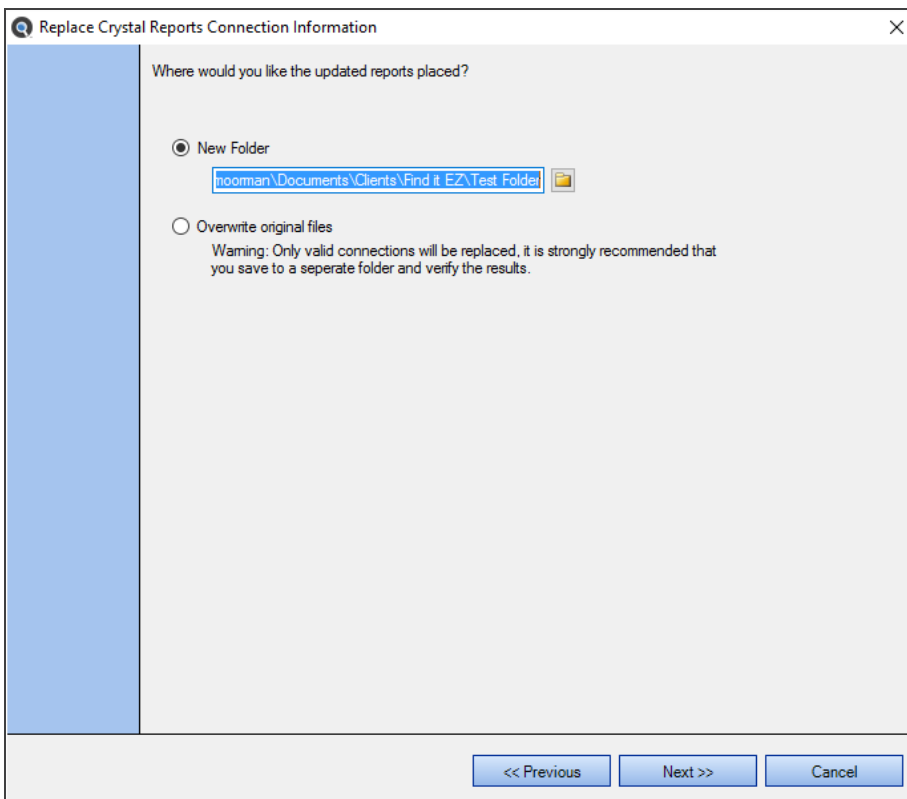
1. To place the updated reports in a new folder, click to choose the **New Folder** option.

    a. Click on the folder icon to the right of the text field. A **Select Folder** dialog will appear.
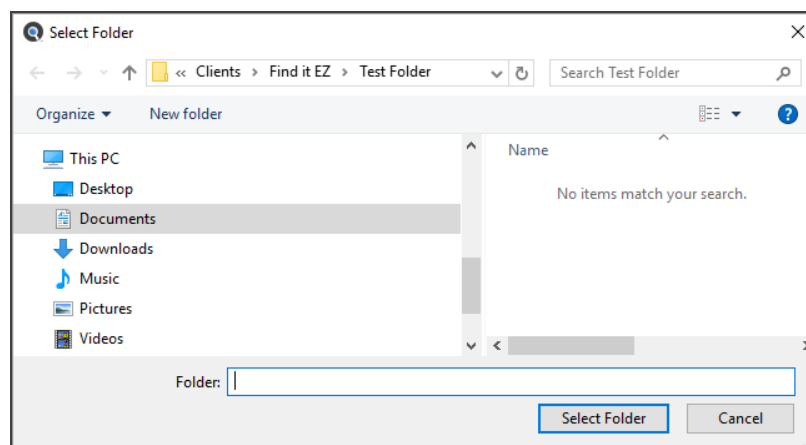
    b. Create or navigate to and select the desired folder.

    c. Click on the Select Folder button. The selected folder path will now appear in the text field.

OR

2. To overwrite the original files, click to choose the **Overwrite original files** option.

> **Alert:** All converted files are written to a single pre-existing target folder. The sub-folder structure from the selected source documents are not created in the target destination output path selected. If duplicate filenames exist in sub-folders, the files will be over-written with the last copy converted. This is a known limitation with an enhancement planned to auto re-create the source folder paths. As a temporary work-around, it is recommended that you convert only a single folder of documents at a time.

3. To continue, click on the Next >> button.

Select Report Tables to Change

FinditEZ allows replacement of multiple or a subset of database connections that may exist within each report file. You may choose to replace only a subset of database connections, or all of them at once.
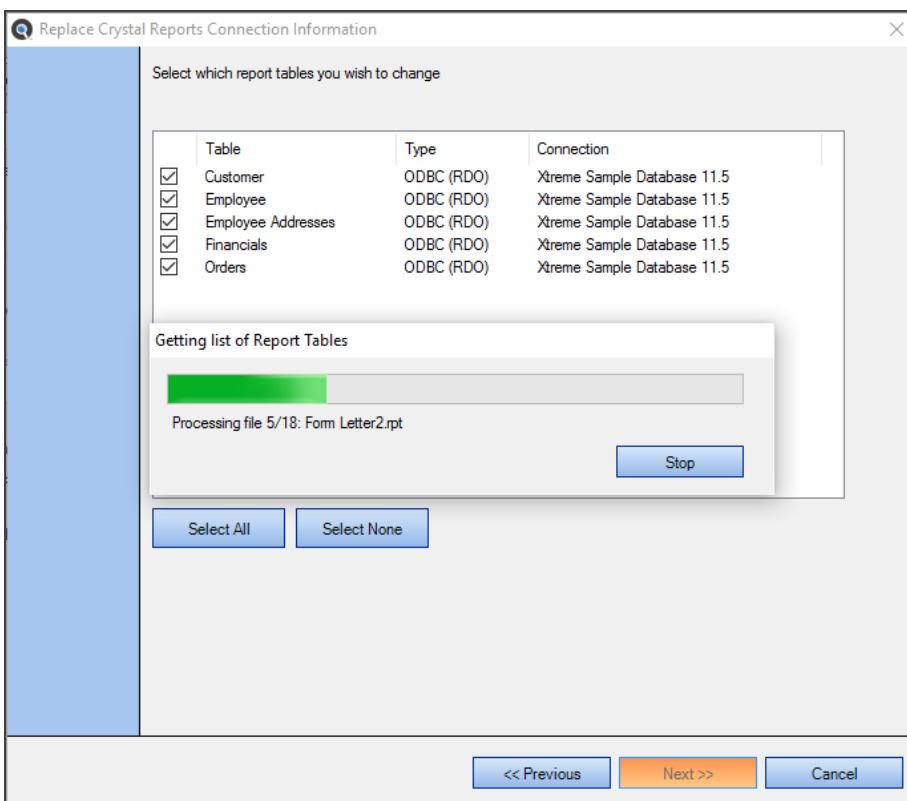
1. A list of report tables from the selected location will load. See example above:
2. To stop Find it EZ from loading report tables, click on the Stop button.
3. For each report table to want to change, click to check the preceding check-box. Note that all report tables in the selected location are selected by default.
    a. To de-select all available report tables, click on the Select None button, then click to check only those you wish to include.
    b. To select all available report tables, click on the Select All button, then click to uncheck only those you wish to exclude.
4. To continue, click on the Next >> button.

Choose New Connection Type
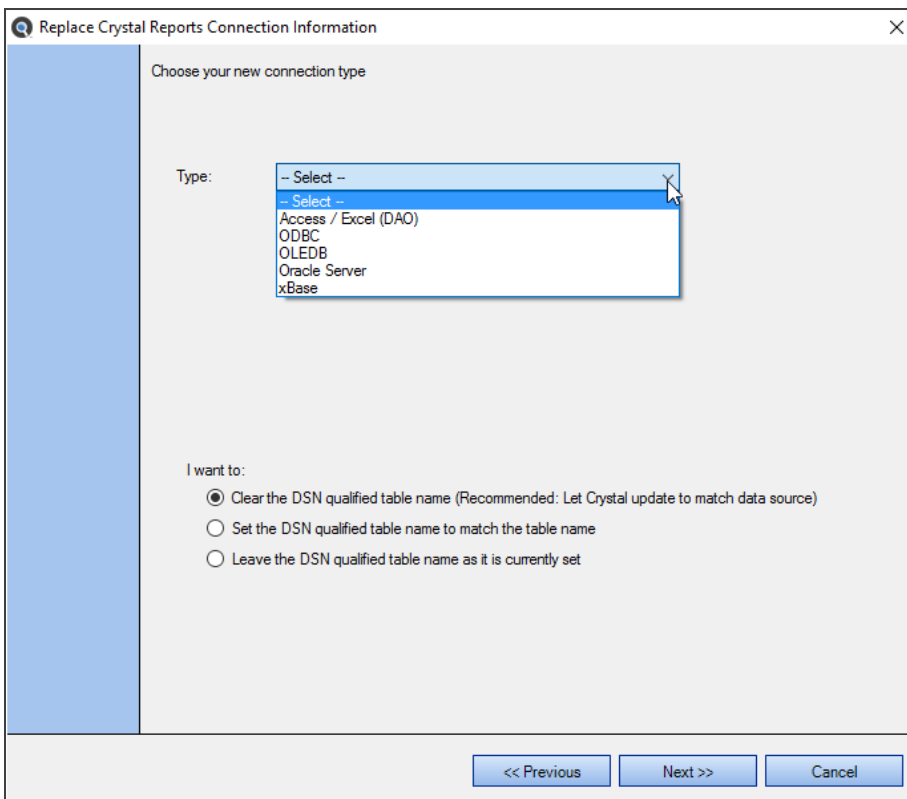
1. Select the new connection type:

   a. Click on the **Type** field to view a list of connection types.

   b. Click to select the desired connection type.

2. Enter and/or select connection parameters:

   a. For **Access / Excel (DAO)** and **xBase**, click on the folder icon and navigate to and open the desired folder.

   b. For **ODBC**, select the **ODBC DSN** and enter the **Username** and **Password**.

   c. For **OLEDB**, **Configure OLE** (via Data Link Properties) and enter the **Username** and **Password**.

      i. Click on the Configure OLE button. The **Data Link Properties** dialog will appear. This dialog is opened by default.
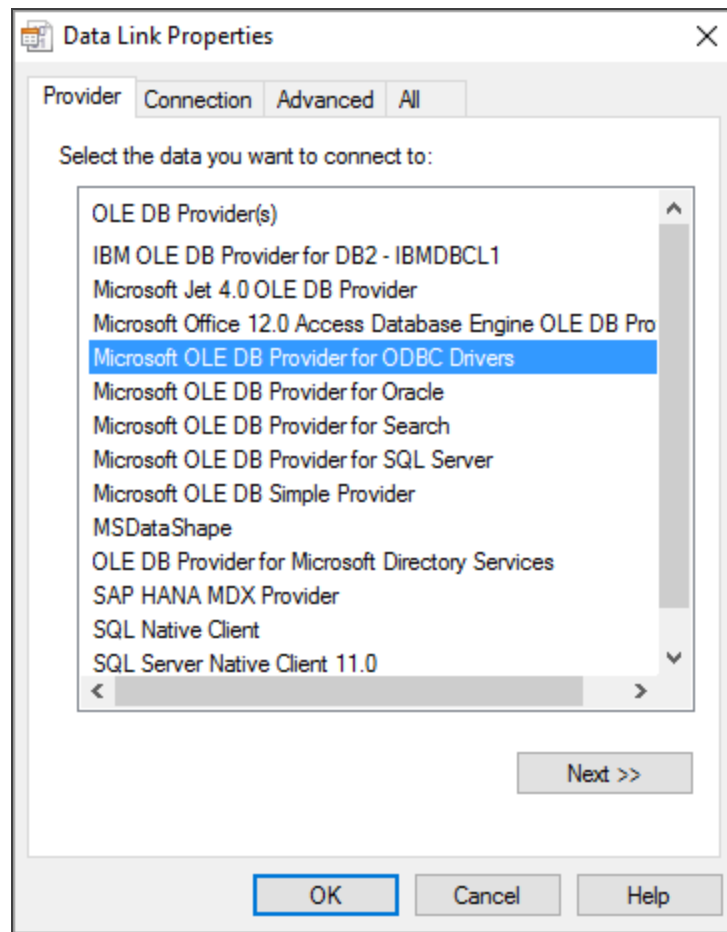
ii. Select the **Provider** and click on the Next button.

iii. Enter **Connection** parameters and click on the Test Connection button.

iv. Enter any further required details (depending upon the selected **Provider**).

v. Click on the OK button.

d. For **Oracle Server**, enter the **Service**, **Username**, and **Password**.

3. Tell Find it EZ what you want to do:

a. In the **I want to** section, click to choose the desired option.

4. To continue, click on the Next >> button.

Confirm Information and Replace

1. Review the following information:

   - **Save Reports To**
   - **New Connection Type**
   - **Connection Parameters**

2. If changes are required, click on the << Previous button. Click the button again to return to previous steps.

3. If the information is correct, click on the Convert button. A **Conversion Status** notification will appear. See example below:

4. To stop the conversion, click on the Stop button.

5. Once the conversion is complete, Microsoft Excel will lauch and open a **Conversion Results** spreadsheet containing a detailed **Conversion Log**.

Enter New Connection Information and Update Reports

This dialog appears only when option 10 is selected from the **Search Wizard**. See example below:

1. In the **I want to change** section, click to choose the desired option.

2. In the **Update the following** section:

   a. Click to select (i.e. check) each item that you want to update.

   b. For each selected item, enter the new connection information in the corresponding text box.

   Note: Only checked items will be updated.

3. In the **Additional Options** section:

   a. Click on the down arrow to view the drop-down list.

   b. Select the desired option from the list.

4. To start the update, click on the Update Reports button.

Perform a Regular Search

A regular search is performed without the use of the **Search Wizard**. Search settings are applied 'manually' and the search is initiated from the Search Bar.

In addition to using the **Search Wizard**, you can run a regular search as follows:

Select a Project

1. From the Find it EZ menu, select **_Projects_** . The currently active project appears preceded by a check mark, as in the example below:
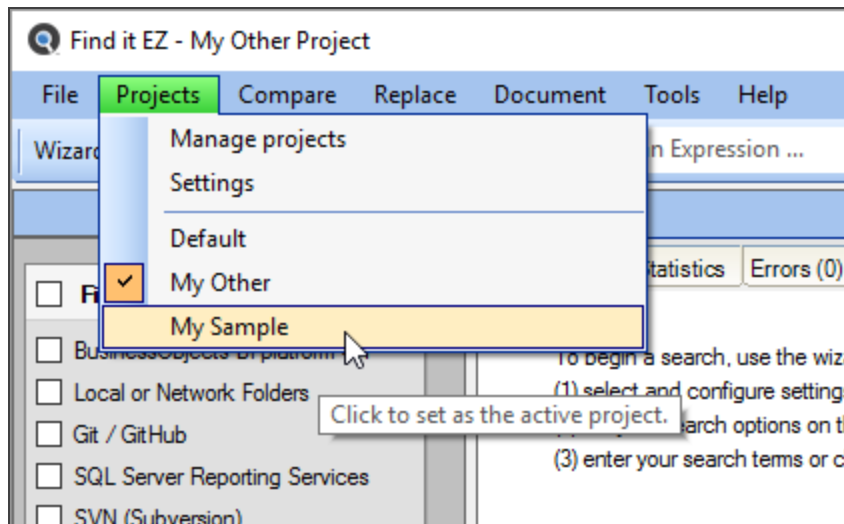
2. Select the name of the project for which you want to perform a search. The selected project name will appear in the Find it EZ window title bar (as above).

Configure Source Location(s)

1. From the **Source** frame on the left, select the source(s) within which you want to search; (i.e. **Repositories**, **Databases**, **BI Reports**, **Programs**, **Documents**).
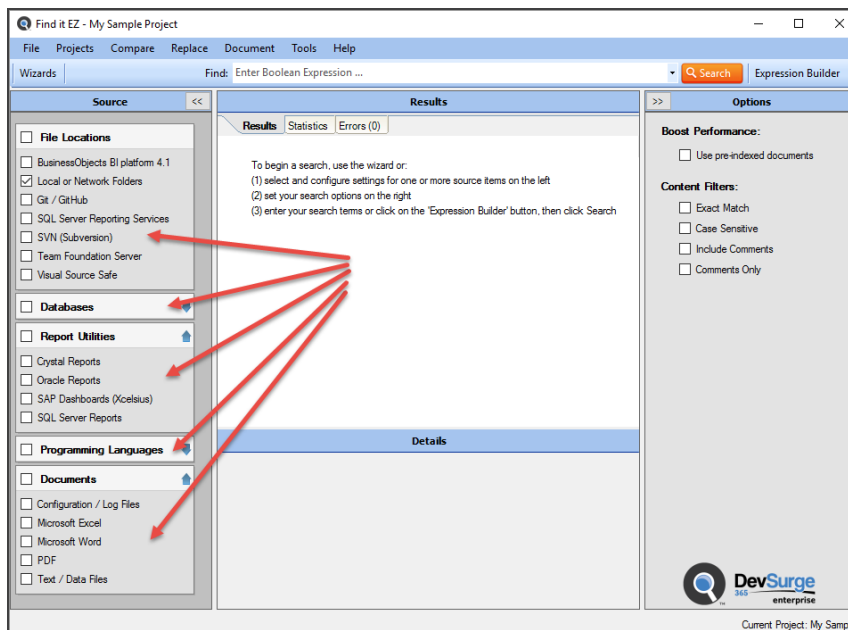
a. Click on a source item. A **[Project Name] Project Settings** dialog will appear, showing advanced configuration settings for the selected source. See example to follow.

b. To expand or collapse a **Source** category, click on the corresponding blue up/down arrow.

c. Configure settings, as required.

2. Example - search Local or Network Folders:
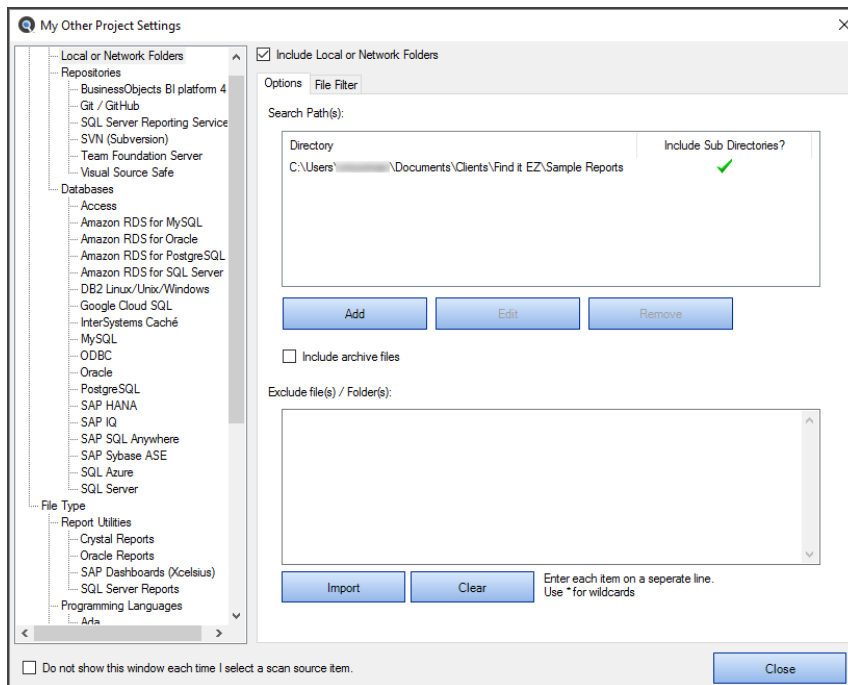
Set Search Options

From the **Options** frame on the right, select the desired **Content Filters** to minimize false-positive search results.
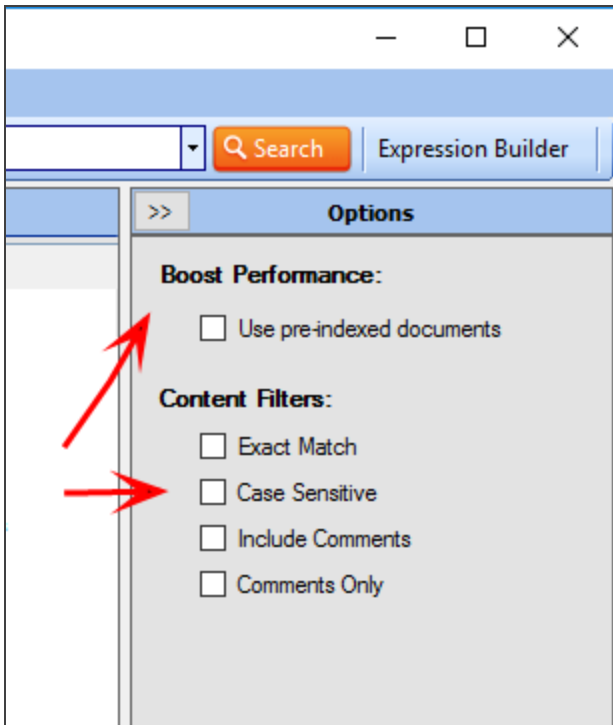
Note: Default search **Options** are: **Search Type** = Boolean with Wildcards Search Expressions, **Content Filters** = None. Your preferred search and indexing options can be changed 'on program start-up' or during 'new wizard tasks' to use this default or to remember your last used settings.

Tip: For better search performance, click to check the Use pre-indexed documents. This will use the last indexed document content and therefore will not refresh content with latest updates. Use this filter if it is known that the source documents are changed infrequently or have not changed since the last Find it EZ project indexing.

Boolean with Wildcards Search Expressions

Use **Search Type** = Boolean Search when you are either looking for a single word or phrase or want to combine one or more search terms into a Boolean expression. This allows you to search for field (A OR B) , [(A AND B) OR C], etc.

The default search & indexing of content includes wildcard searching within Boolean expressions (A* OR B, A AND B*, etc.). For example if you search for "User*," the system will only find matches on items that start with "User."

Because of the way the engine is setup, there are a few limitations:

- Wildcard is "stopped" on a whitespace boundary (i.e. If the text in the document is "UserName likes seafood" and you use the search expression string "User*food" it will not find a match on this set of words separated by spaces. However searching for "[User*] AND [*food]" will match on the first word and third word on in the same document. If it was "UserName.likes_ seafood" then "User*food" will match on the single concatenated word (individual terms joined by special characters to form a single word).

Exact Match Filter

When the Exact Match setting is turned on in **Content Filters**, the result must be found between a white space boundary (these include spaces, tabs, periods, special characters and line feeds for strings). This is normally used to find a single, exact word match.

> **Note:** Exact match is case insensitive.

Use Pre-Indexed Documents

This filter is located on the **Options** panel; in the **Content Filters** section. Click to check the check-box to apply this filter.

For better search performance, this filter will use the last indexed document content and therefore will not refresh content with latest updates. This is not an issue if it is known that the source documents are changed infrequently or have not changed since the last Find it EZ project indexing.

Enter Target Keyword(s)

On the search bar (see image below), enter the desired search text into the **Find** text box.

Example:

Start Your Search

1. To initiate the search, click on the Search button. A **Searching** window will appear, showing the status of the search.

2. Once complete, the **Search Complete** dialog box will appear, as in the example below:
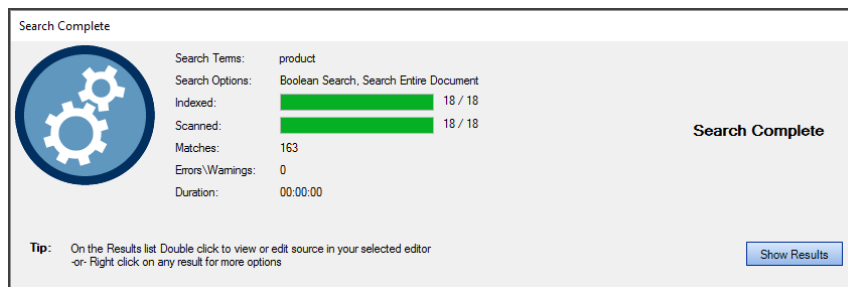
3. Click on the Show Results button. A list of results matching your search criteria will appear in the **Results** frame.
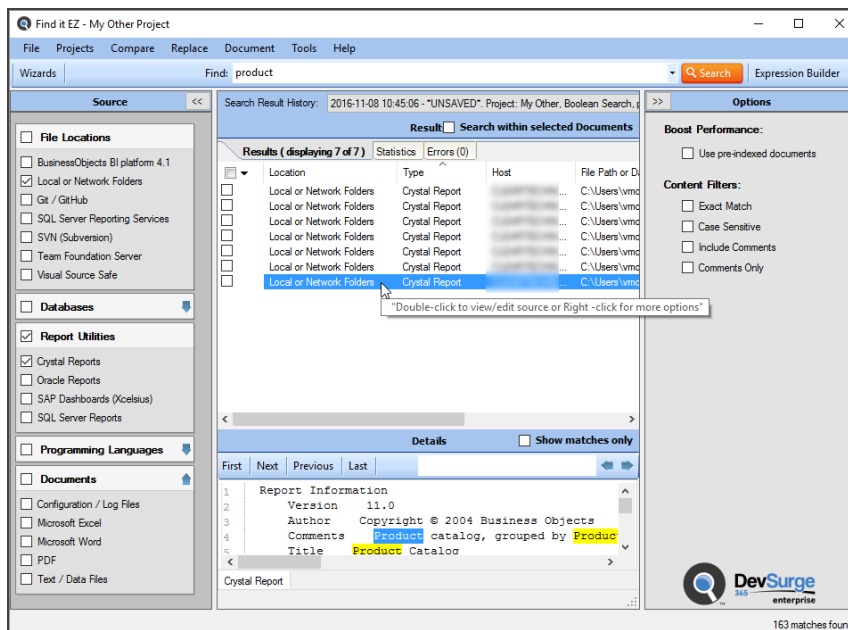
Note: After performing a search, settings can be saved to a Project for later use again.

View Search History

Search history can be viewed from the search bar. To view search history:

1. Click on the down arrow button located on the right of the **Find** field. A drop-down list of previous search expressions will appear.
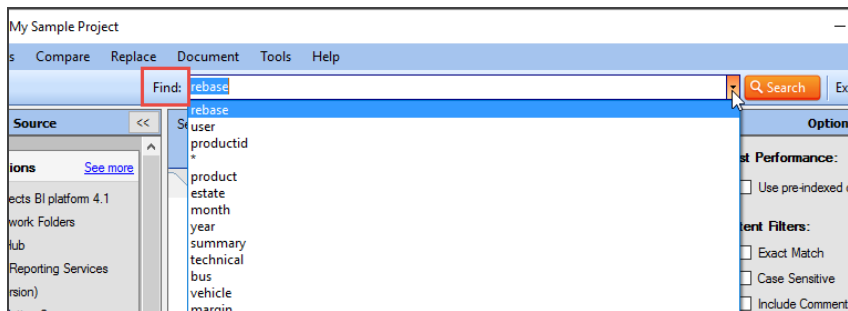
Note: This history is limited to 26 items and is preserved between program sessions. New search terms are added 'top down.' When the list exceeds 26 items, the bottom item drops off.

2. Click to select the desired search expression.

See Also:

- "Local or Network Folders" on page 131
- "Repositories" on page 143

- "Databases" on page 150
- "Programs" on page 164
- "Documents" on page 168
- "BI Reports" on page 161

- "Wizards Overview" on page 68
- "Projects" on page 125
- "Set User Options" on page 46
- "Use the Expression Builder" on the facing page
- "Work With Search Results" on page 171

- "Clear Expressions History" on page 60
- "View Search Result History" on page 171

Use the Expression Builder

This section provides instructions to perform a search using the **Boolean Search Builder**, building a search query, reviewing example Boolean expressions, and creating a valid Boolean expression using Find it EZ custom Boolean syntax.

Open Boolean Search Builder

To launch the **Boolean Search Builder**, click on the Expression Builder button located on the right side of the search bar. See below:
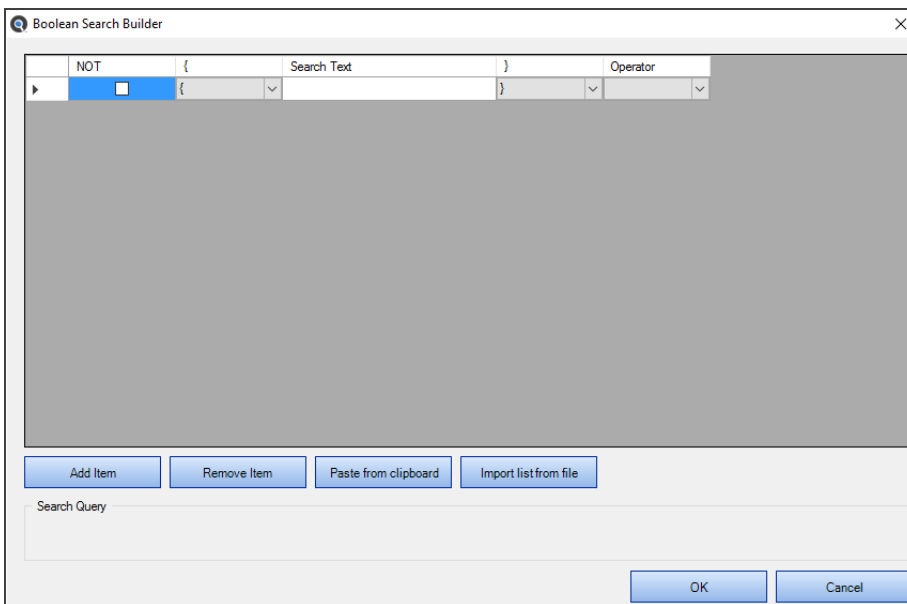
Build Search Query

1. Click on the Expression Builder button to launch the **Boolean Search Builder**. A blank search query item is added.
2. To apply NOT to the current search query, click to check the corresponding **NOT** check-box.
3. Select the required number of curly brackets from the left curly bracket drop-down list.
4. Enter the desired search text into the **Search Text** text box.
5. Select the required number of curly brackets from the right curly bracket drop-down list.
6. Select the desired Boolean operator (AND or OR) from the **Operator** drop-down list.

Find it EZ Custom Boolean Syntax

Find it EZ uses custom syntax so that items are recognized as Boolean operators rather than search text.

For example, to have the Boolean operator "AND" be recognized, you must enclose the search terms in curly brackets, e.g. {this} AND {that}. The use of curly brackets is special syntax to our software. The **Boolean Search Builder** wizard helps with this for building/managing complex expressions, especially for first time users.

Example Boolean Expressions

For **Search Syntax Examples** including Boolean and Wildcard, visit: **https://www.finditez.com/support/#syntax**.

Add New Search Query Item

To add a new search query item, click on the Add Item button. A new, blank search query item line will be added.
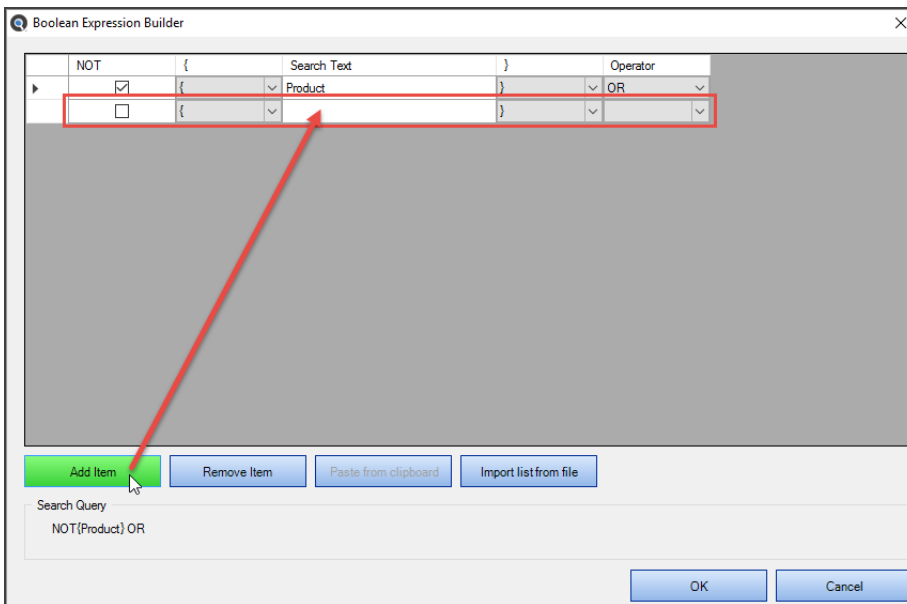
Remove Search Query Item

1. To remove a search query item, click on the right arrow button preceding the row to select the item.

   Note: You must click on the right arrow, and delete individual rows, one at a time.
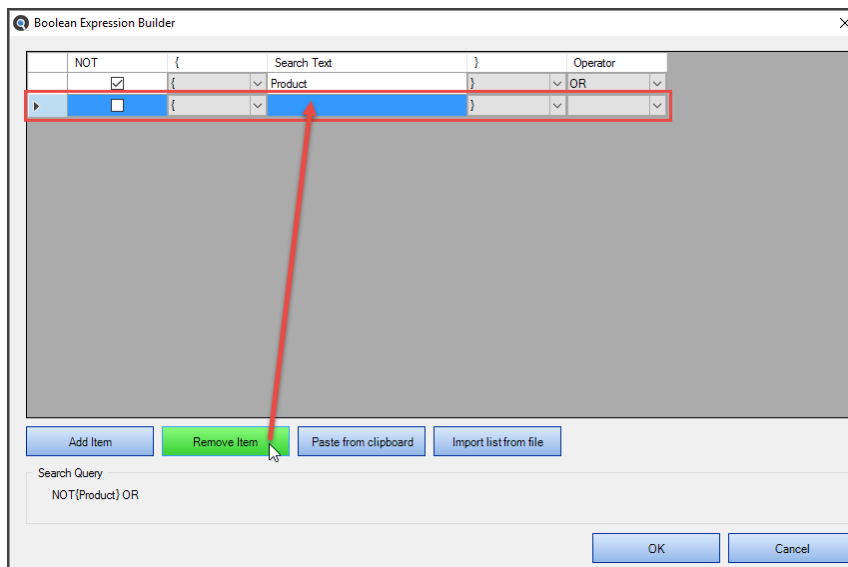
2. Click on the `Remove Item` button. The selected item will be removed from the search query.

Paste Search Query Item From Clipboard

To copy a search query item to the clipboard:

1. Locate the desired searc h query item text within any file or window on your system.

2. Highlight the desired text.

3. Press the **Ctrl** + **C** keys on your keyboard. The selected text will be copied to the clipboard.

To paste the copied search query item into a search query:

1. Click on the `Paste from clipboard` button. A search query item line will be created for each instance of search text and the cor-rect curly brackets and operators will be applied. See example below:

> **Example:**
> Copied search query item: **{insert} and {{into} AND {{Order} OR {Customer}}}**
> Resulting search query in **Boolean Search Builder**:
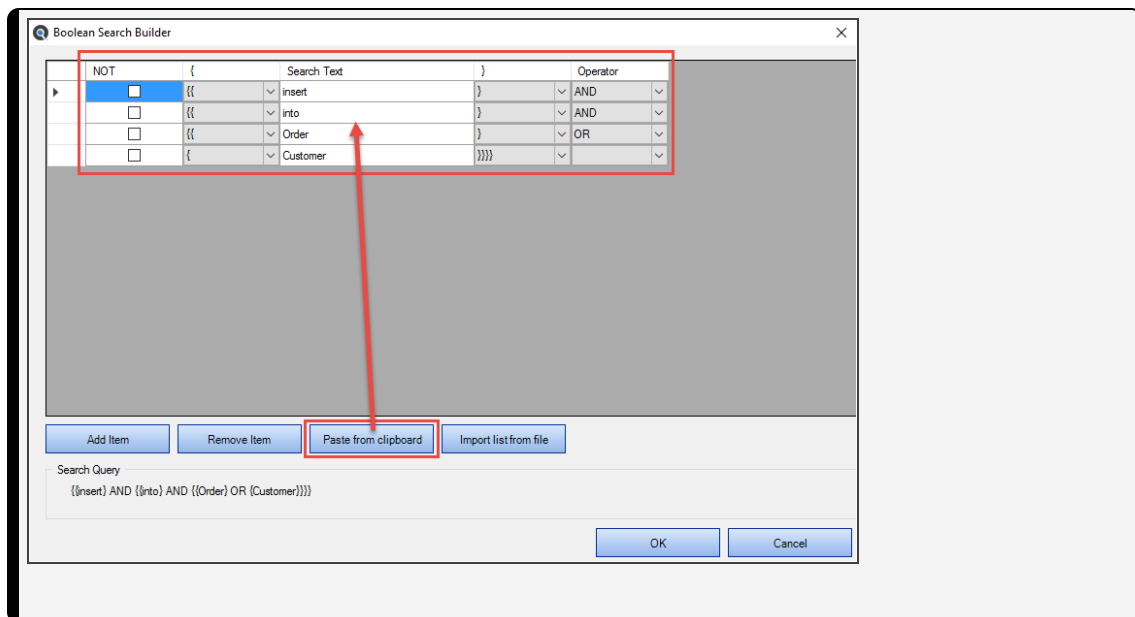
Import Search Query Values From File

1. Click on the Import list from file button. An **Open** dialog box will appear.
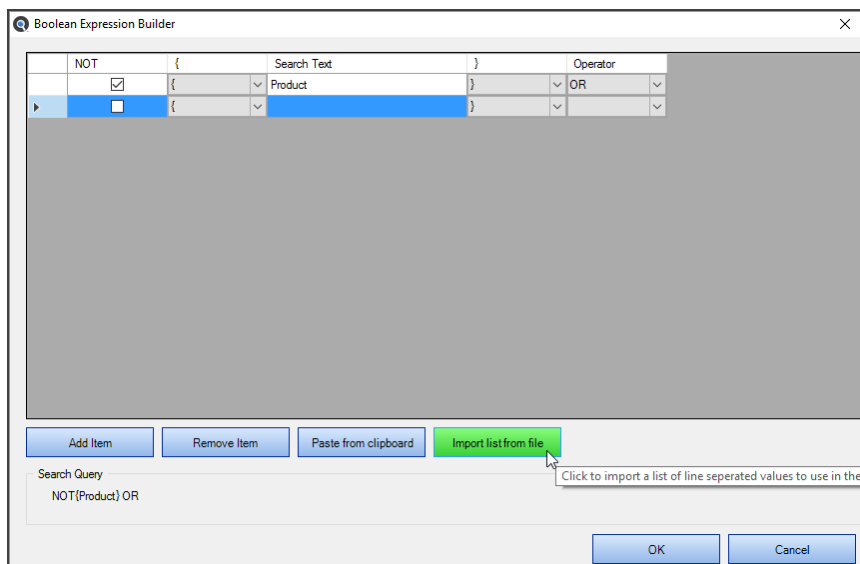
2. Navigate to and select the file containing the list of line separated values to use in the query.

    Note: Accepted file types include *.txt and *.csv.

3. Click on the Open button. A search query item line will be created for each instance of search text.

4. Apply NOT, curly brackets to control order of expression evaluation, and operators (AND/OR) as required.

View Search Query Details

As you are building your search query using the **Boolean Search Builder**, note that the entire search expression is shown in the **Search Query** box at the bottom of the dialog box.

Apply Boolean Expression to Search

1. To apply the Boolean expression to your search, click on the OK button. The search query will be entered into the **Find** text box located on the search bar.

2. To launch the search, click on the Search button.

Searching Window

During a search, the **Searching ...** status dialog appears. See example below:
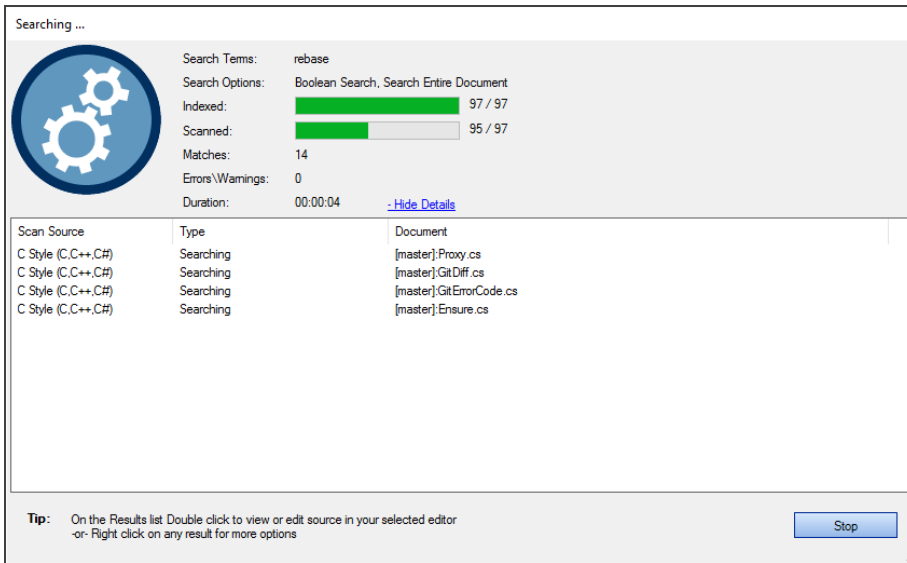
Refer to the table below for a description of each data element:

Searching Data Element	Description
Search Terms	This is the search expression entered into the **Find** text box located on the Search Bar.
Search Options	This is a summary of the current **Search Type** and **Content Filters** settings on the **Options** panel.
Indexed	This shows a visual progress display and current count of the total number of documents indexed vs the total number of documents available in the selected sources on the **Source** panel.
Scanned	This shows a visual progress display and current count of the total number of indexed documents (above) that have been scanned for the current search criteria (i.e. Search Terms).
Matches	This is the total number of instances where the current search expression has been found in the source documents.
Errors/Warnings	This is the total number of errors or warnings that have been generated while connecting and/or scanning the source documents for search criteria matches. Once the search is complete, these can be viewed in the Results window by clicking on the Errors tab (click on an error row to view details).
Duration	This is the elapsed time used to index and scan the selected source documents
Status Table	This is the current **Source**, **(Document) Type or Processing Status**, and **Document (Name)** being scanned for matches.

Multitask While Searching

Once a search is launched, you can continue working on other programs while Find it EZ runs unattended in the back-ground. While a search is running, you can not minimize the Find it EZ program or use any other window in Find it EZ as the search dialog box keeps focus until completed or cancelled. However, Find it EZ will go to the background on your desktop if you launch another program (e.g. Word, a browser, Visual Studio, etc.).

Hide or Show Searching Details

While a search is taking place, you can view or hide search details. See examples below:
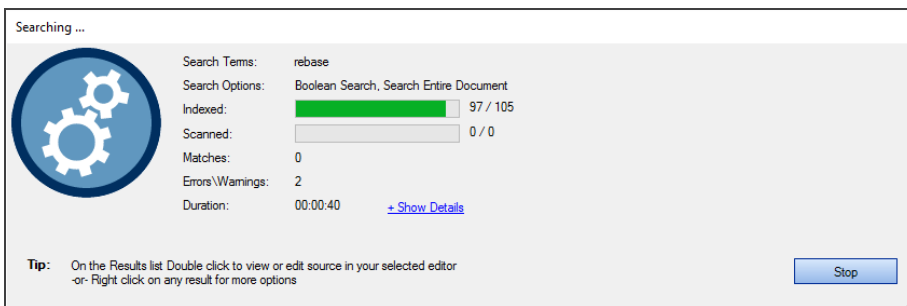
Click on the **+ Show Details** link to expand the table showing **Source**, **(Document) Type or Processing Status**, and **Document (Name)**. See example below:
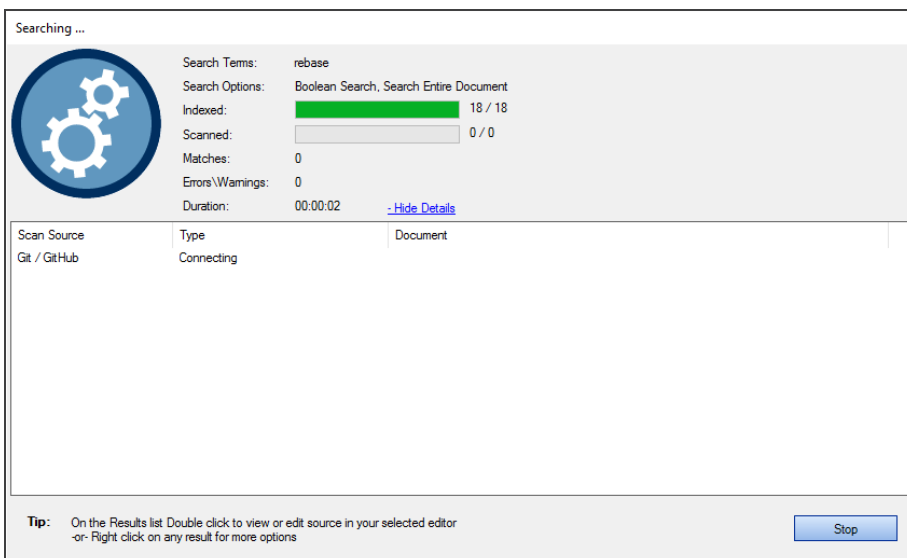
To hide details, click on the **- Hide Details** link.

Show Search Results

Once a search is complete, the progress bars will stop advancing and a "Search Complete" notification will appear (see example below).

To view results, click on the Show Results button.
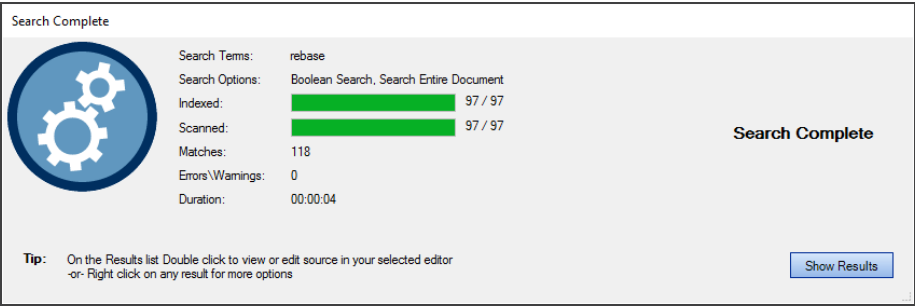
The results will appear listed in the **Results** window. See example below:
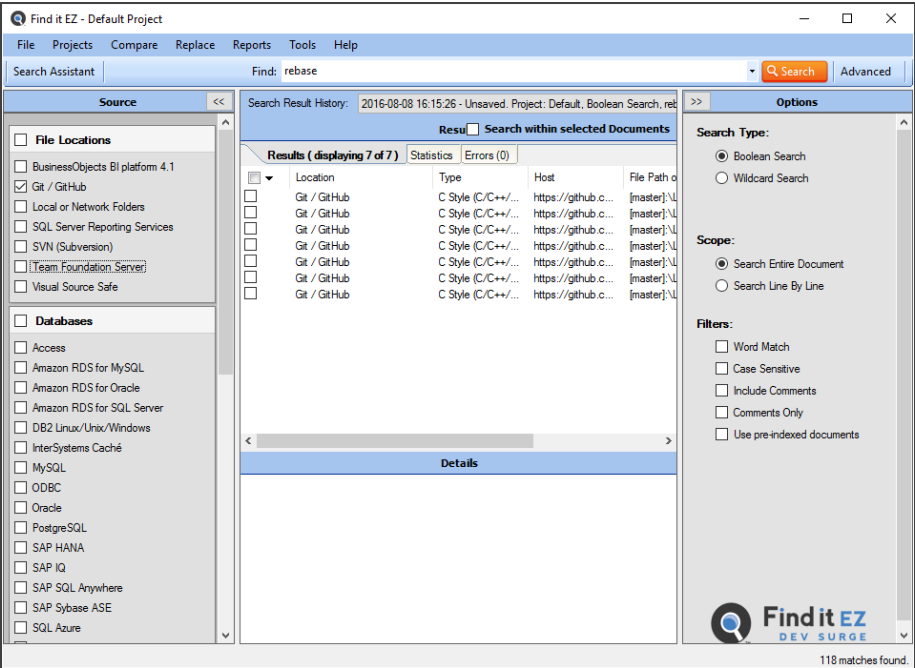
Stop Searching

To cancel a search in progress, click on the Stop button. A notification will appear at the bottom of the dialog. See example below:
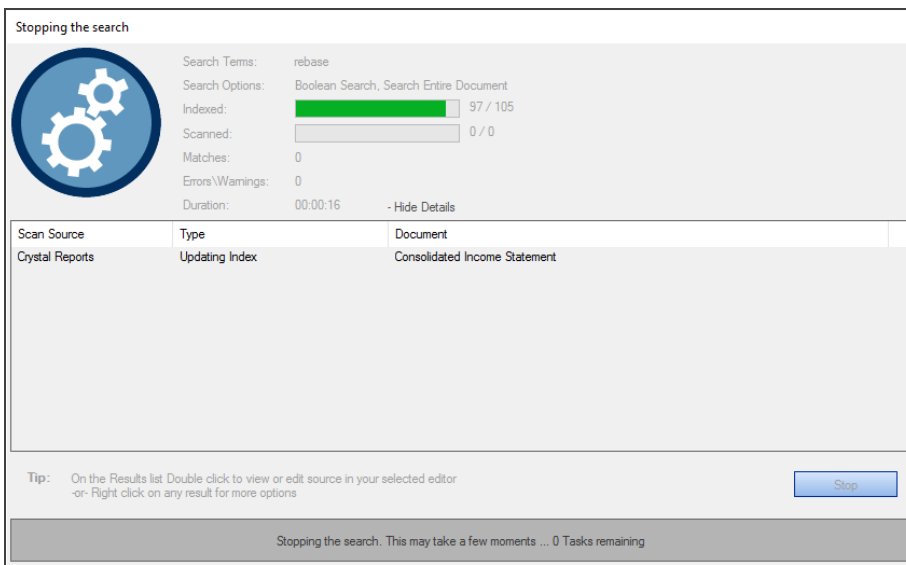
View Search Errors

If a search is complete and the error count is > 0, you can view error details as follows:

1. Note the error count on the **Search Completed with Errors** dialog. See example below:
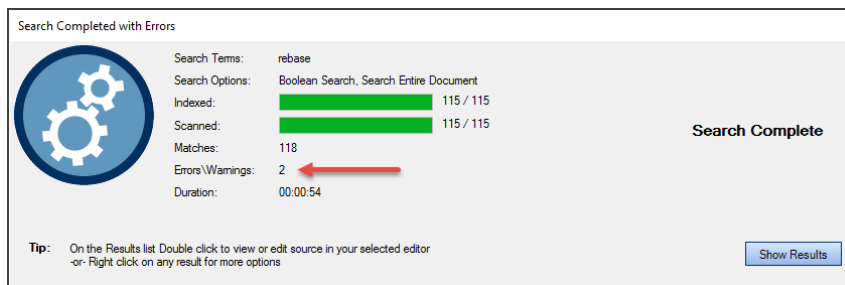
2. Click on the Show Results button.

3. In the **Results** window, click on the **Errors** tab.

4. Locate the error for which you want to view details and double-click on the row. Or, right-click and select *View Error* from the context menu. An error details dialog will appear. See example below:
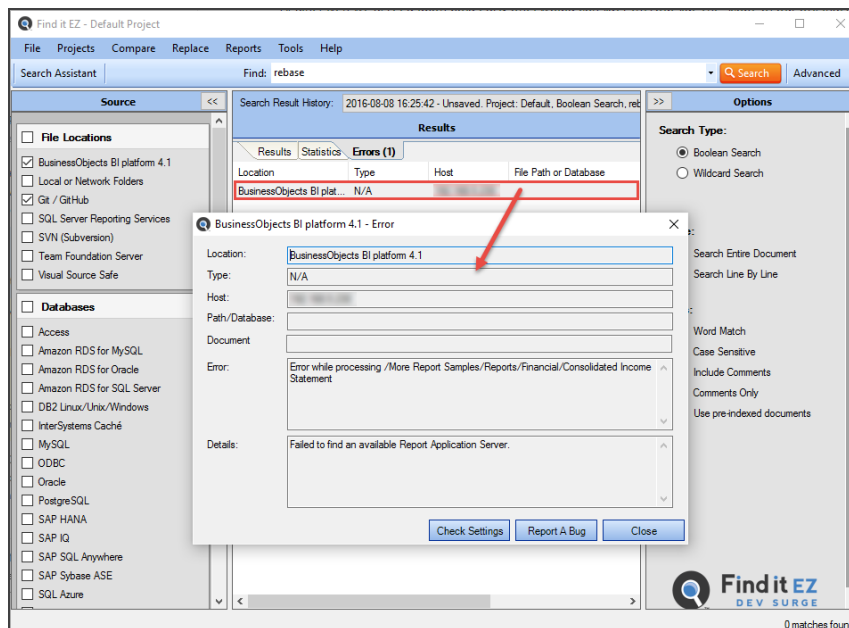
5. Review details of the error.

6. To check your project settings, click on the Check Settings button.

7. To report a bug, click on the Report A Bug button.

8. To close the error details dialog, click on the Close button.

See Also:

- "Work With Search Results" on page 171
- "File Locations and Source Settings" on page 129
- "Find it EZ Support" on page 261

Projects

This section provides step-by-step procedures to add, edit, switch, clone, rename, set active, delete, or save a project and its settings.

Projects are used to configure and store paths and connection information for a collection of source code files. These settings are retained for re-use between sessions, and can also be used to filter a small subset of items to be included in a project, compare or documentation run. Each project or collection is generally configured in relation to how your development process flows. For example, in a waterfall development process, you would typically have planned releases, each with a corresponding set of individual unit and an integration test environment. There is often also a staging environment for a frozen set of releases where final user acceptance testing is performed, followed by a production environment. Each environment will have unique underlying database host, reports, programming language files and so-on.

One common way to use Find it EZ projects is to set up a distinct collection of settings for each such environment or release. You can then quickly switch between or compare files within these unique projects as you move through the design, development, migration, and production support processes.
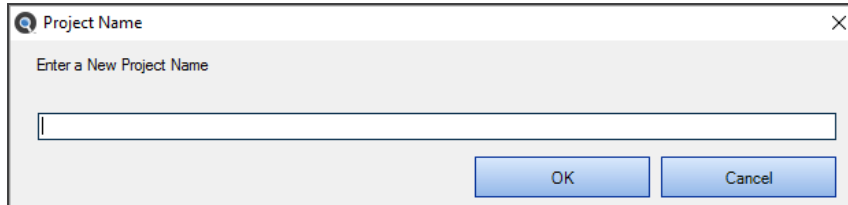
Projects are a key feature for organizing your work within Find it EZ, and the ability to configure each once, and then re-use settings between indexing and search passes, is a huge time saving benefit.

From the Find it EZ menu, select **Projects -> Manage Projects** . The **Manage Projects** dialog box will appear, as below:
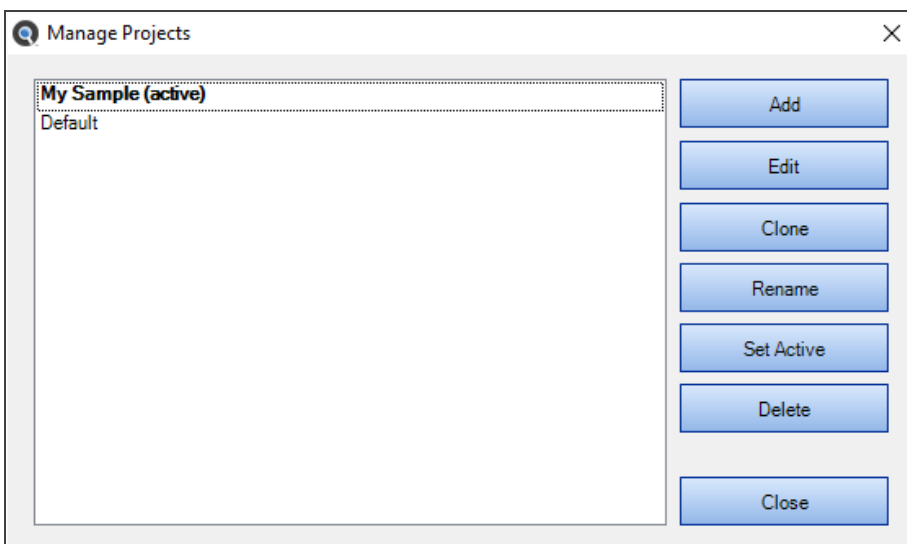
Add a New Project

1. From the **Manage Projects** dialog box, click on the Add button. A pop-up will appear.
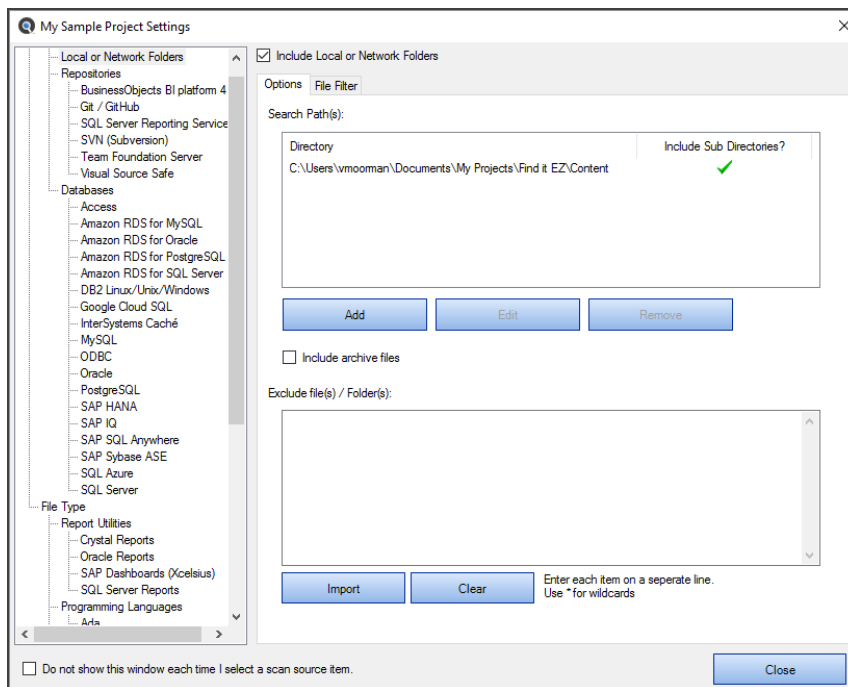
2. Enter the name of the new project.

3. Click on the OK button. The new project will be added to the list.

4. To close the **Manage Projects** dialog box, click on the Close button.

Edit a Project

You may change the configuration settings to add a new file path, add a new database schema or owner to include that set of objects, add file or database object filters and so on.

1. From the **Manage Projects** dialog box, in the projects list, click to highlight the project you want to edit.

2. Click on the Edit button. The **Project Settings** dialog box will appear. See example below:

Switch Between Projects

1. The name of the currently viewed project is shown in the bottom, right corner of the main screen. See below:

2. To switch to another project:

    • From the Find it EZ menu, select **Projects -> [Project Name]** .
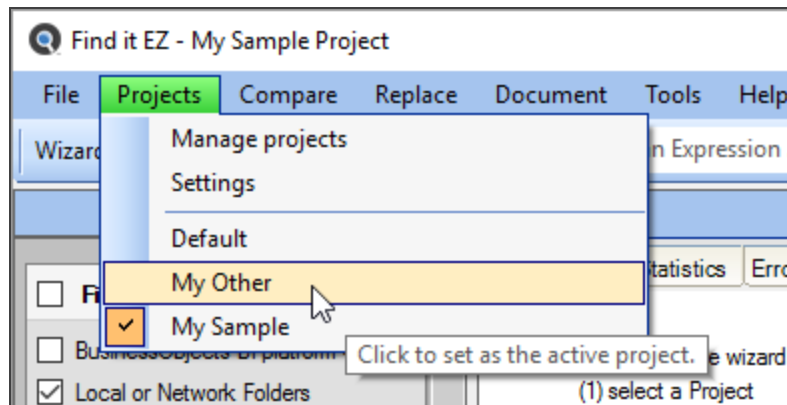
    • The selected project settings will be loaded for use.

Another way to select a saved project settings for use is to use the **Project Management** dialog box:

1. From the **Manage Projects** dialog box, click to select the name of the project you want to set as the active project.

2. Click on the Set Active button. The project will appear in the list followed by the word "(active)."
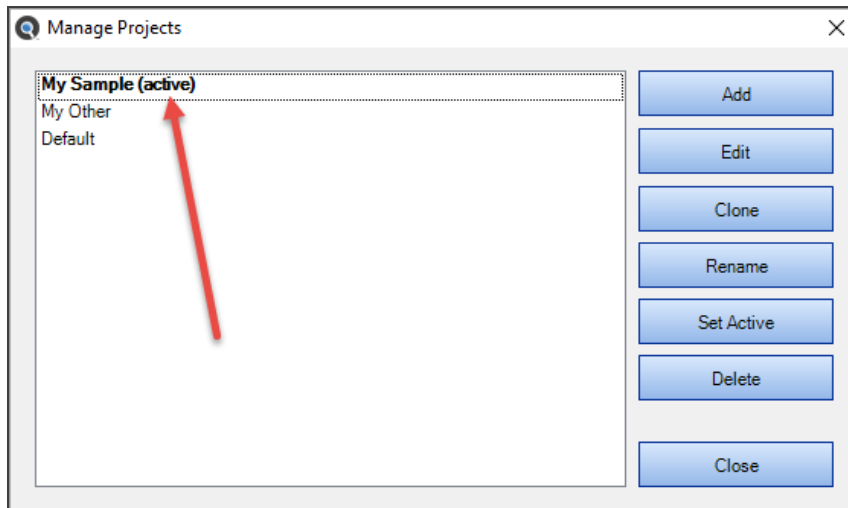
3. To close the **Manage Projects** dialog box, click on the `Close` button.

Clone a Project

A quick way to set up a new project is to clone an existing one, then update individual source configuration settings as needed.

1. From the **Manage Projects** dialog box, click to select the project you want to clone (i.e. copy all settings).

2. Click on the `Clone` button. A pop-up will appear.
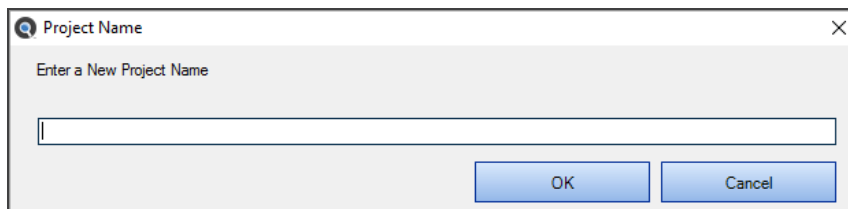
3. Enter a different name for the new, cloned project.

4. Click on the `OK` button. The cloned project will be added to the list.

5. To close the **Manage Projects** dialog box, click on the `Close` button.

Rename a Project

1. From the **Manage Projects** dialog box, click to select the project of which you want to change the name.

2. Click on the `Rename` button. A pop-up will appear.
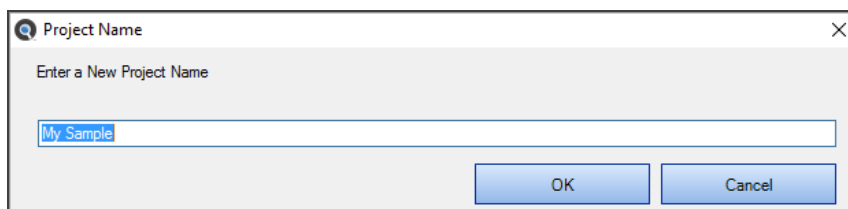
3. Change the name, as desired.

4. Click on the OK button. The renamed project will appear in the list.

5. To close the **Manage Projects** dialog box, click on the Close button.

Delete a Project

1. From the **Manage Projects** dialog box, click to select the name of the project you want to delete.

   Note: The active project cannot be deleted.

2. Click on the Delete button. The selected project will be immediately removed from the list.

3. To close the **Manage Projects** dialog box, click on the Close button.

File Locations and Source Settings

This section provides detailed instructions to configure project settings for **Source Location** (local or network folders, repositories, databases) and **File Type** (Programs, Documents, BI Reports), including instructions on how to customize Find it EZ project settings.

Note: Some project configuration settings are used in combination with each-other. For example, in order to include any Programming Language files, Reports or Other Documents, you must select and configure the physical "Location" of those files. This could include a local or network folder, a version control system, or a report scheduling repository.

There are three ways to access the **Project Settings** dialog box:

1. From the Find it EZ menu, select *Projects -> Settings* to access the active project settings. See below:
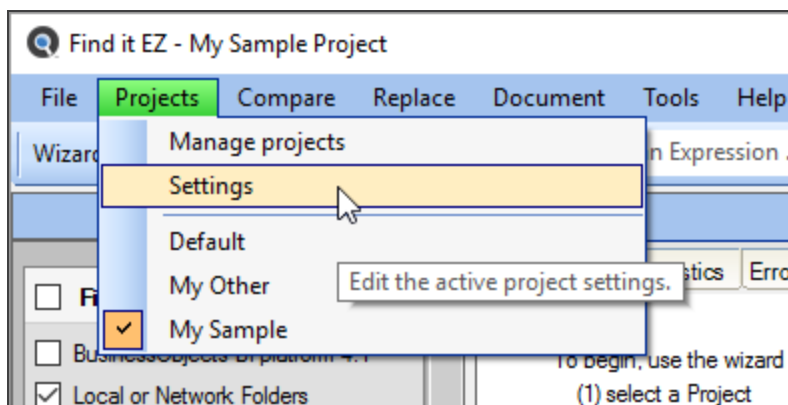
2. Within the main program window, right-click on any location or source item within the expanded **Source** panel. The advanced settings for the active project source item will appear (see sample below).
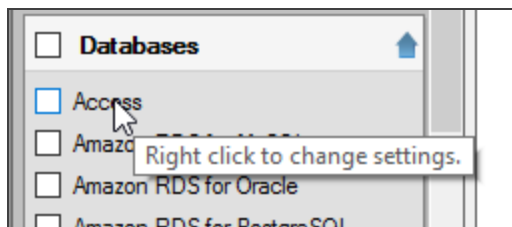
3. From the **Manage Projects** dialog box, click to highlight a project from the list, then click on the Edit button to access the selected project's settings.
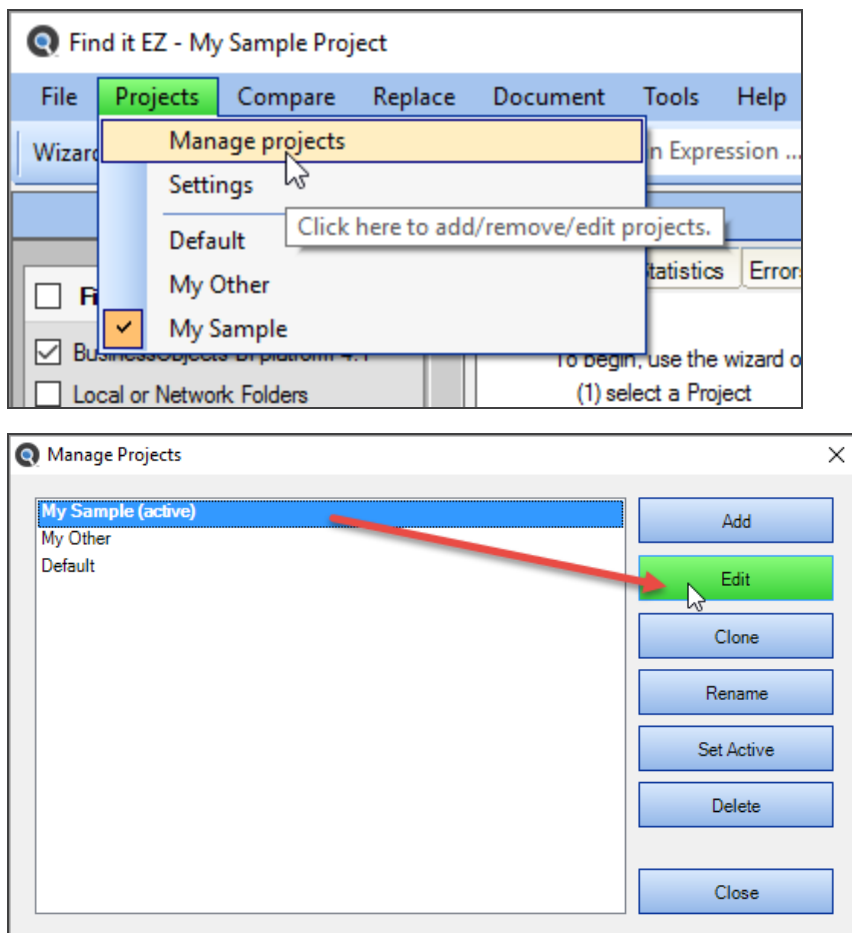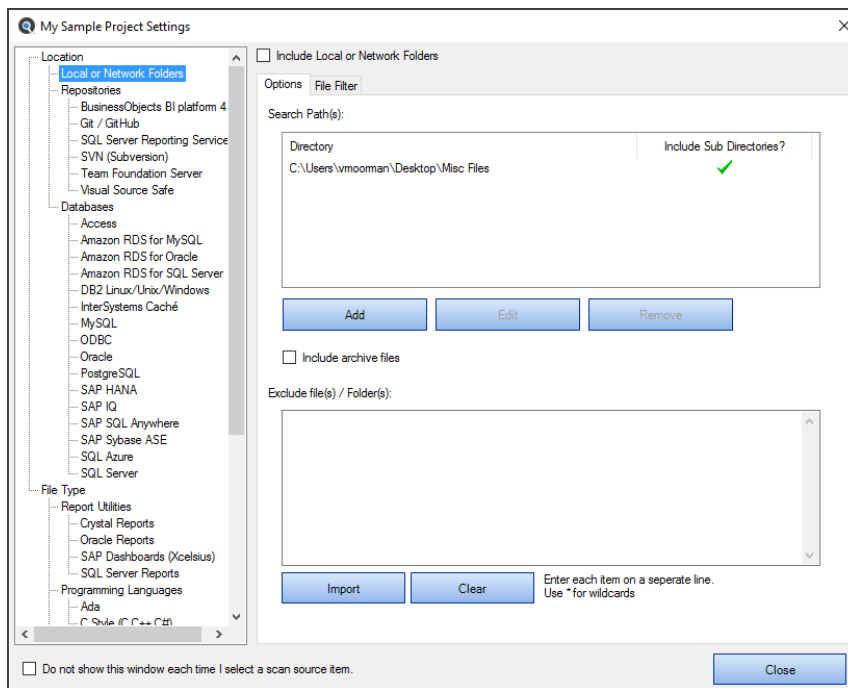
View or Hide Project Settings

At the bottom, left of the **Project Settings** dialog box, you can click to check the **Do not show this window each time I select a source item** check-box.

Apply Project Settings

When you are done making changes to one or more a source items, click on the Close button to apply the changes.

> **Note:** Changes are also automatically applied and saved as you navigate between source items within the **Project Settings** dialog box.

> **See Also:** "Set User Options" on page 46 (in the **Tips and Hints** section, there is a **Show project settings whenever I select a source item** check-box). Click to check or un-check as desired.

Location

This section provides detailed steps required to configure project settings for local or network folders, repositories, and databases. These are the physical locations of the source files, documents, and data included within a project.

Local or Network Folders

This section describes the procedures required to include the set of selected programming files, reports, and other documents from local or network folders, add or edit search path(s), include/exclude archive files, exclude files or folders, and to apply file filters to restrict processing to only a subset of selected files.

To access the active project settings for local or network (source) folders:

1. In the frame on the left, in the **Location** category, click to select **Local or Network Folders**. See below:
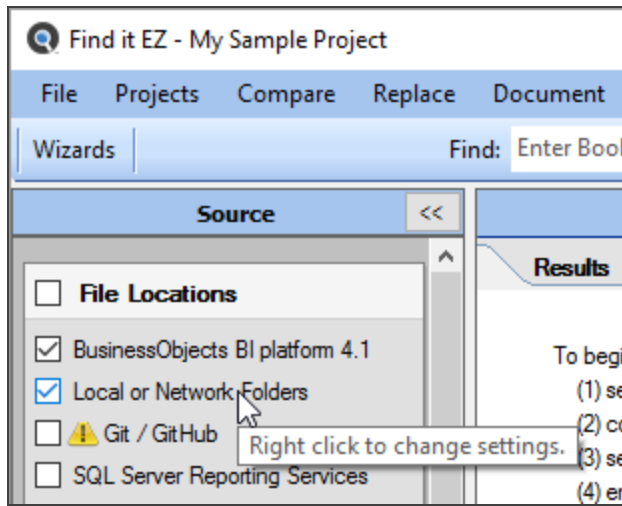
    OR

2. From the menu, select *Projects -> Settings* . See below:
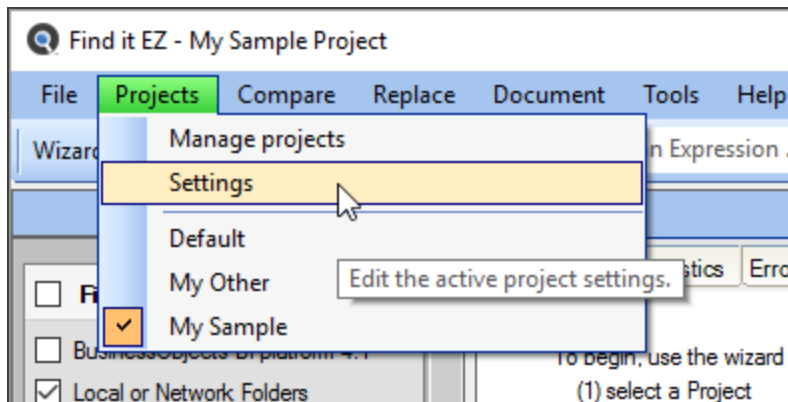
3. The following dialog box will appear:
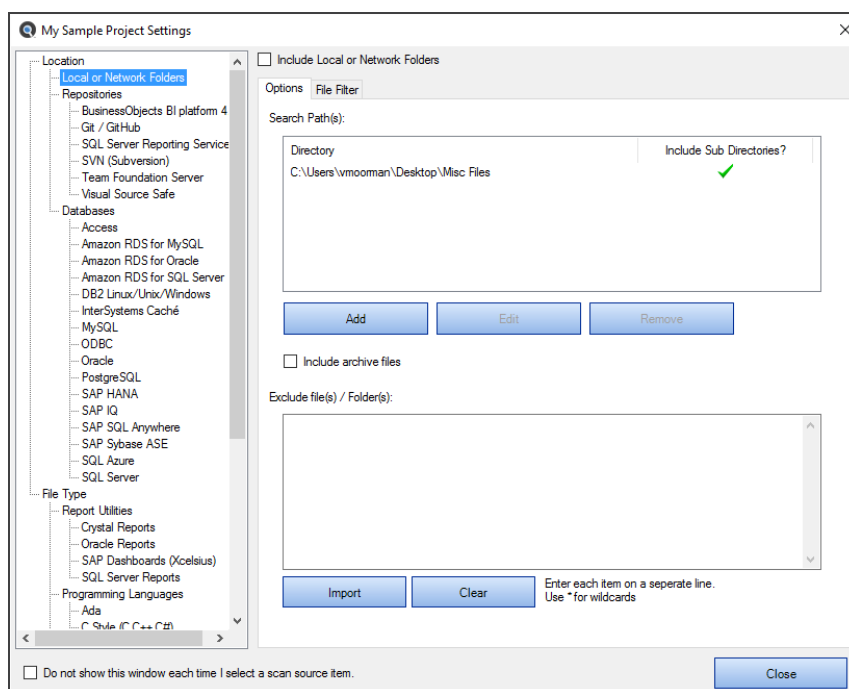
Include Source

When a source item is selected from the frame on the left, the **Include [Source Name]** check-box at the top of the dialog box is checked by default. To exclude the source from your search, click to un-check the check-box.

Note: If a source item is excluded, any existing settings for the source are retained.

Add or Edit Search Path(s)

To add a search path to the Local and Network Folders search:
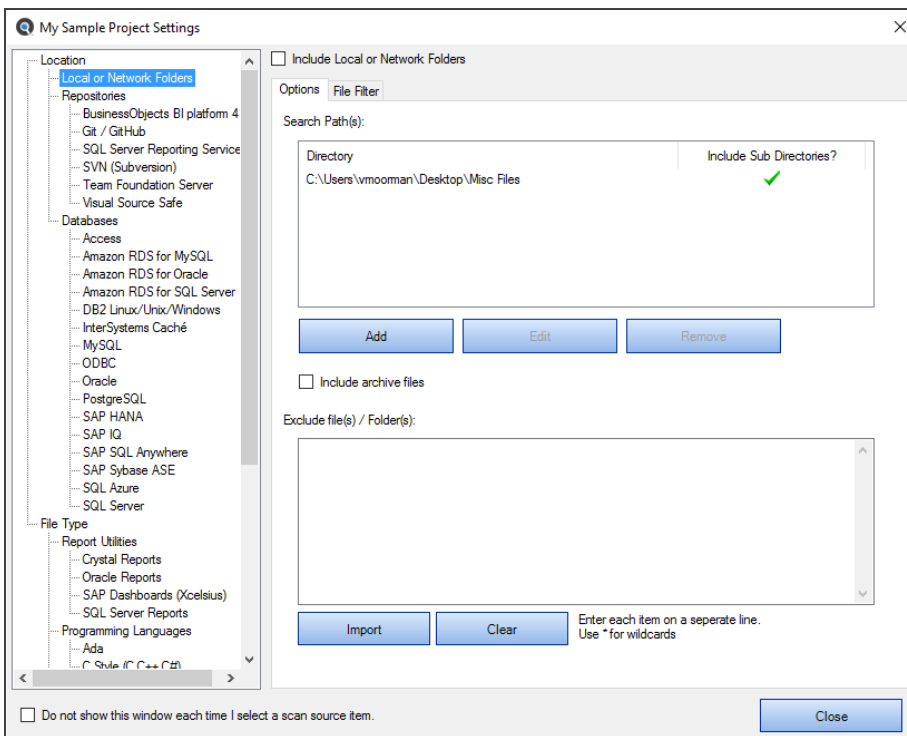
1. From the **Options** tab, click on the Add button.

2. In the **Search Path(s)** section, click on the Add button. A **Search Path** pop-up will appear, as below:
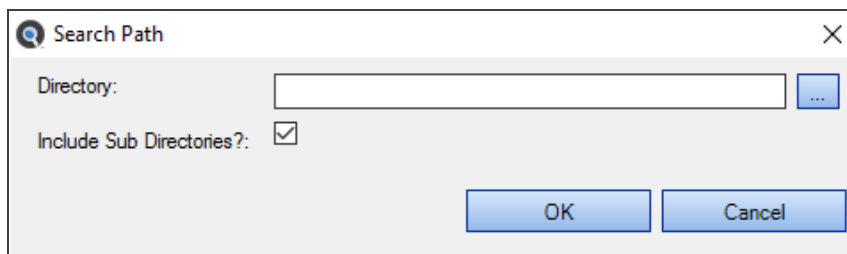
3. Click on the "**...**" button to the right of the **Directory** field. A **Select Folder** pop-up will appear. See example below:
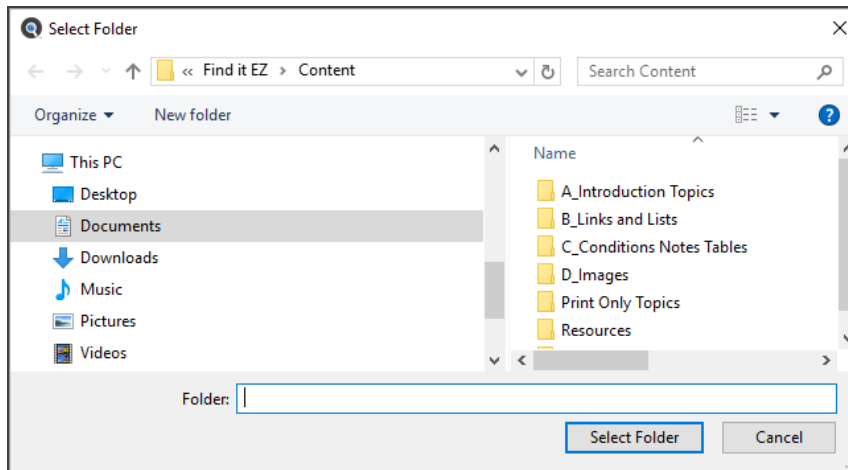
a. Navigate to and select the folder you want to add as a search path.

b. Click on the Select Folder button. The folder path will appear in the **Directory** field.

> **Tip:** You can also copy and paste or type in a fully-qualified path into the **Directory** text box.

4. Note that the **Include Sub Directories** check-box is checked by default. To exclude sub directories for the selected folder, click to un-check this check-box.

5. Click on the OK button. The new search path will be added to the **Search Path(s)** list. See example below:
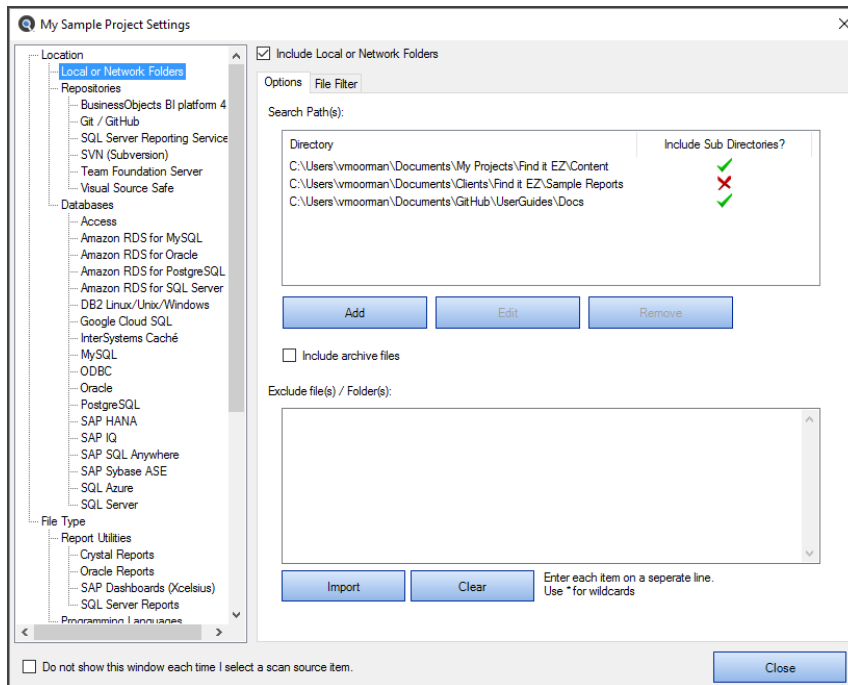
> **Note:** If sub directories have been included for a given search path, a green check mark appears in the corresponding **Include Sub Directories?** column.

> **Alert:** You will be prevented from entering duplicate paths or sub-folders for a project.

6. Repeat steps 2 through 5 to add multiple paths.

To edit a search path:

1. In the **Search Path(s)** list, click to highlight the search path you want to edit. See example below:
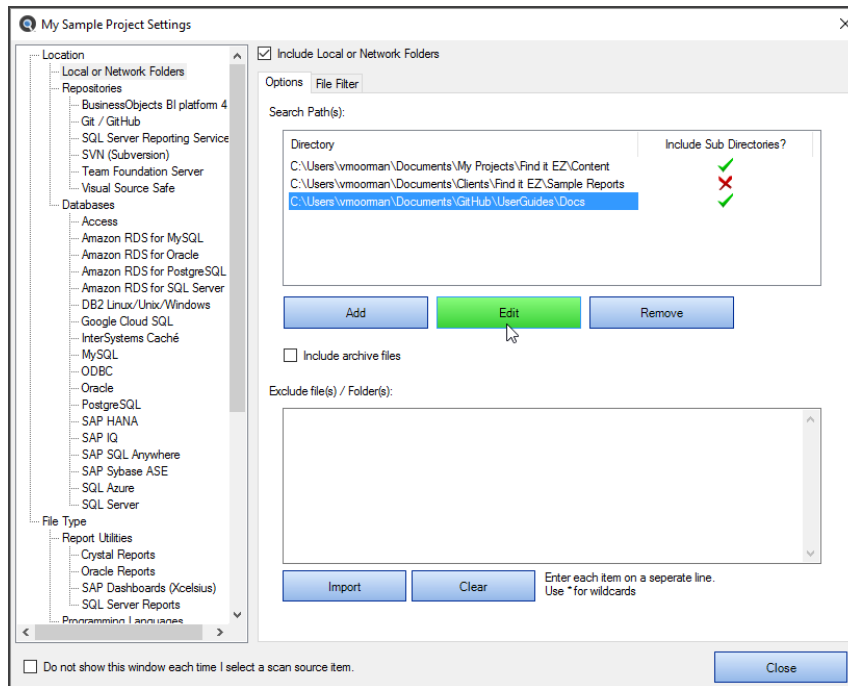
2. Click on the Edit button.
3. Repeat steps 3-5 above.

To remove a search path:

1. In the **Search Path(s)** list, click to highlight the search path you want to remove.
2. Click on the Remove button. The selected search path will be removed from the list.

Click on the Close button to apply your changes.

Include Archive Files

Whether or not a file is considered an Archive is determined by the file extension. If it is any of the following support Archive types, it will be opened as an archive and Find it EZ will search the contents:

"ARJ", "LZH", "LZMA", "RAR", "RPM", "7Z", "XZ", "BZ2", "BZ", "GZIP", "GZ", "TAR", "ZIP"
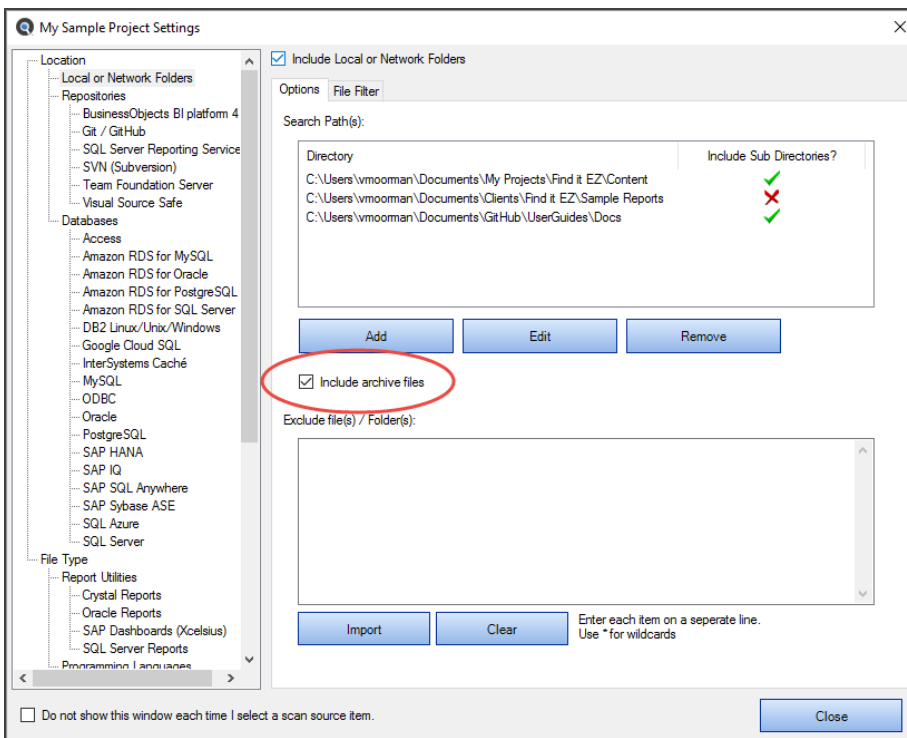
To include archive files in your Local or Network Folders search, locate and click to check the **Include Archive Files** check-box.

Exclude Files or Folders

There are three ways to exclude specific files or folders from the selected directories (in the **Search Path(s)** list) in your Local or Network Folders search:

1. Right-click a search results item in the **Errors** tab, chose *Add File to Project Exclusion List* from the context menu. See below:
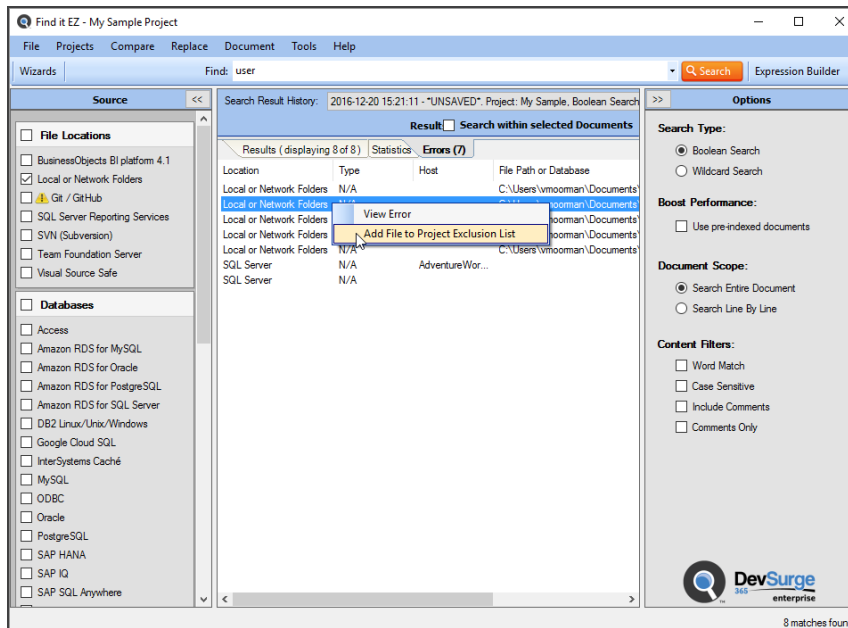
2. To import a list of files to exclude:

    a. In the **Exclude File(s) / Folders(s)** section, click on the Import button. An **Open** pop-up will appear.
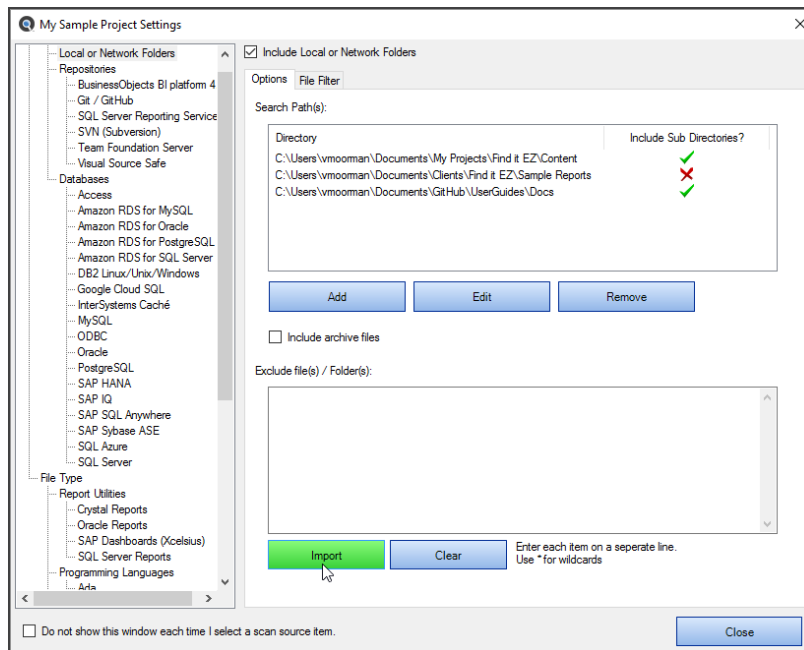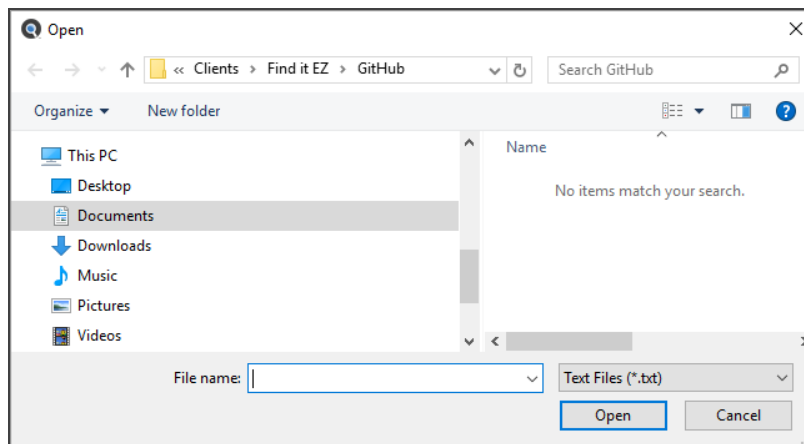
b.   Navigate to and select the desired *.txt file.

c.   Click on the Open button. The contents of the selected file will appear in the **Exclude File(s) / Folder(s)** list.
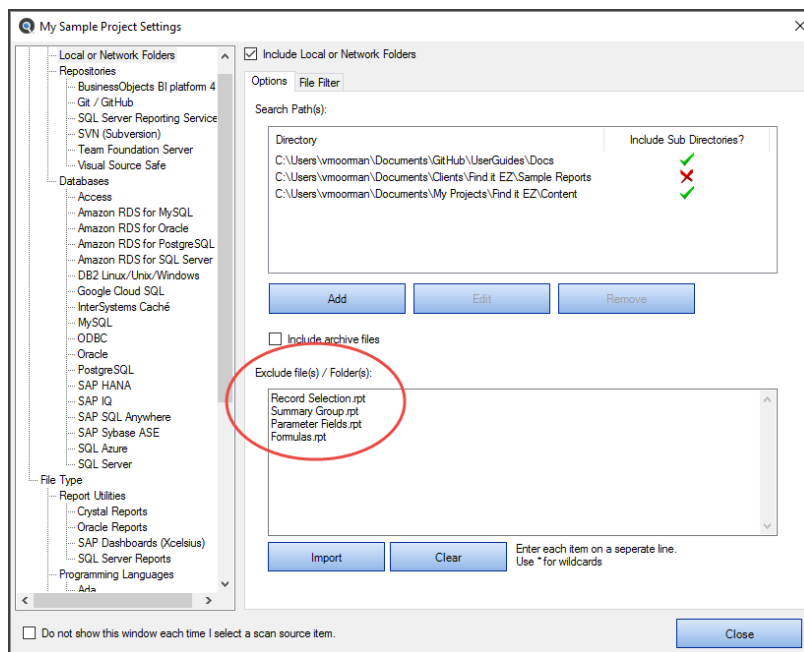
d.   Click on the Close button to apply your exclusions.

AND / OR

3.   To enter the path, file name, or wildcard to exclude:

a.   Click inside the **Exclude File(s) / Folder(s)** text box and enter the desired text to exclude.

> **Note:** Enter each item on a separate line. Use * for wildcards. For example, enter the path to exclude a sub-directory, exclude a specific type of files (e.g. *.cs), etc.

b.   Click on the Apply button to apply your exclusions.

To clear the **Exclude File(s) / Folder(s)** list:

- Click on the Clear button. All items in the list will be removed.

Apply File Filter

You may use the **File Filter** tab to include only a subset of specific files within the configured path(s). You must first add the desired source path folders. This filter is often used to minimize false postives or expedite indexing and searching by limiting the number of file contents included in a project. This setting can be quickly changed to include all or a subset of files as needed.

To apply a file filter to a source search:

1. Open the **Local or Network Folders** dialog box.
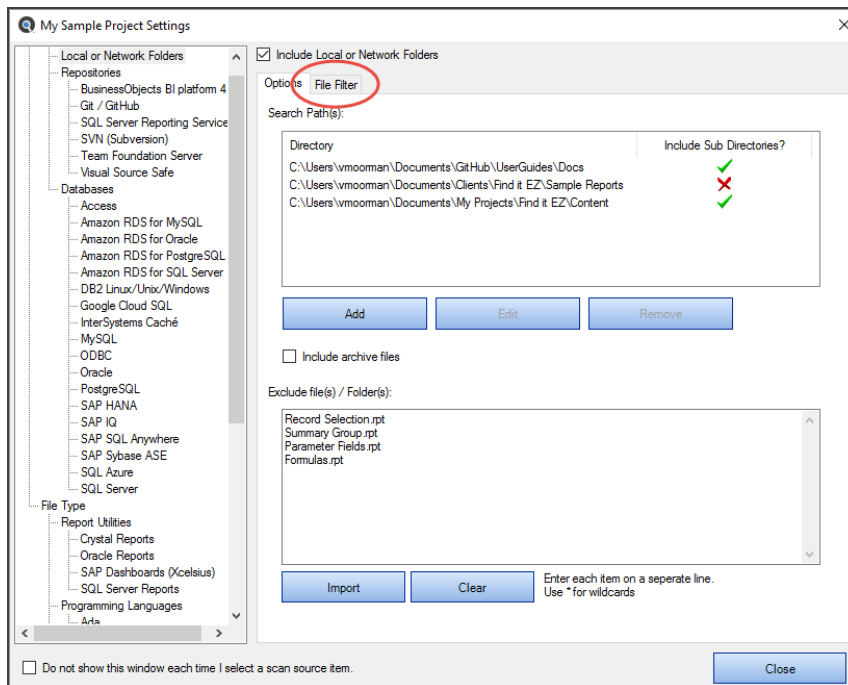
2. Click to select the **File Filter** tab.
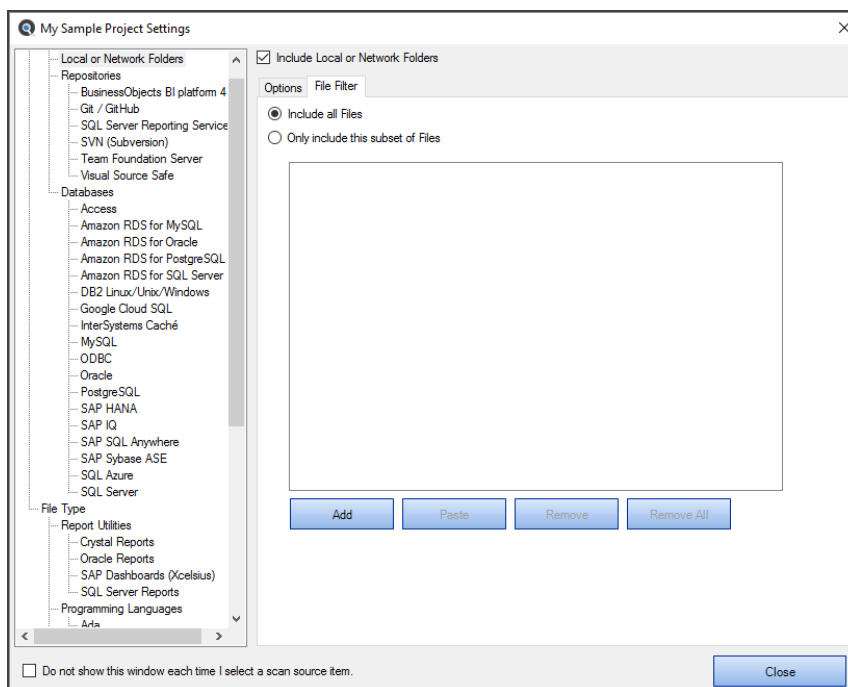
3. To include all files, click to choose the **Include all Files** option. This is the default selection.

   OR

4. To include only a subset of files, click to choose the **Only include this subset of Files** option.

5. To add a subset:

   a. Click on the Add button. An **Add Filter** pop-up will appear.
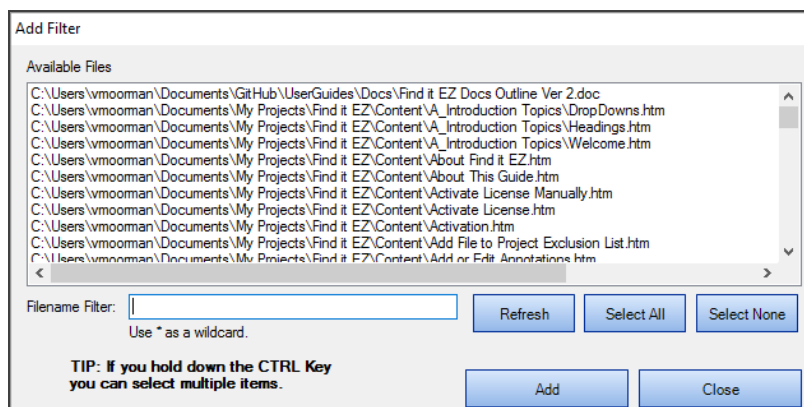
   The **Available Files** list will be populated with a list of files included in the folders selected previously on the **Options** tab.

   b. Click to select the desired file(s).

Note: Select multiple items by holding down the (**Ctrl**) key. Or, click on the Select All button or the Select None button, or the Refresh button as desired.

c. To filter by file name, use the **Filename Filter**:

    i. Click inside the **Filename Filter** text box.

    ii. Enter the desired file name filter, using wildcards as desired (e.g. *.cs, *.js, *user*, etc.).
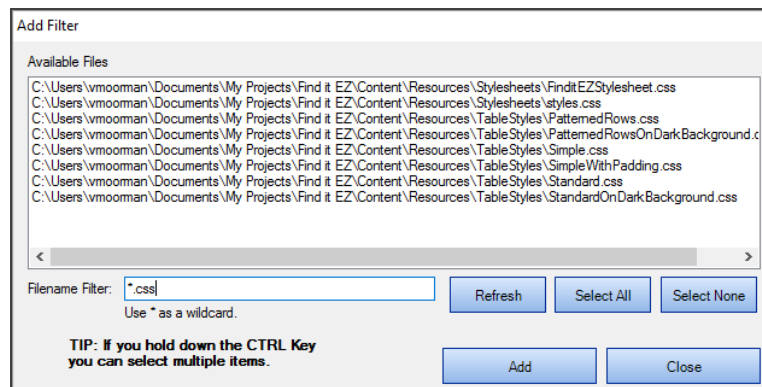
Note: This filter applies to the filename itself, and does not apply to the drive letter, folders or pathnames.

d. Select one or more items from the list.

Tip: Use the Select All button or hold the CTRL key then click to select multiple items.

e. Once complete, click on the Add button. The selected files will be added to the **Only include this subset of Files** list.

f. Repeat steps 5a through 5e to add additional files as desired.

AND/OR

6. To paste a subset from the clipboard:

a. Click on the Paste button. The clipboard contents will be added directly to the **Only include this subset of Files** list.

b. Optionally repeat Copy then Paste additional fully qualified filenames until completed.

> **Alert:** The clipboard may contain a single file or list of filenames, but each line must be formatted with a fully qualified path.

7. To remove file(s):

   a. To remove all files from the list, click on the Remove All button.

   b. To remove only selected file(s) from the list, click to select the files you want to remove, then click on the Remove button.

8. Click on the Close button to apply your changes.

Repositories

This section describes the procedures required to include files stored in various version control systems or report scheduling repositories, enter repository connection information, test a repository connection, select repository folders, and apply a file or report filter.

To access project settings for repositories:

1. Edit the active project using the *Projects -> Settings* menu.
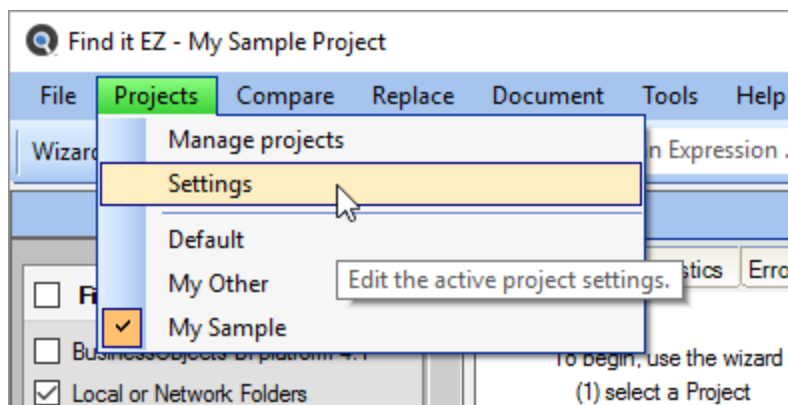
2. In the frame on the left, in the **Location** category, locate the **Repositories** sub category.

> **Note:** You may access the same dialog box with a simple right-click on the desired repository in the expanded **Source** panel on the left of the main application screen.
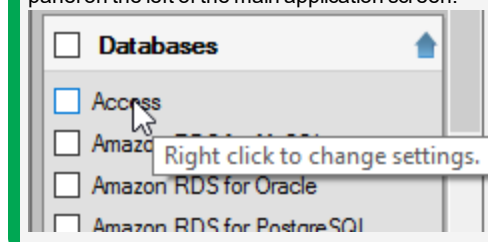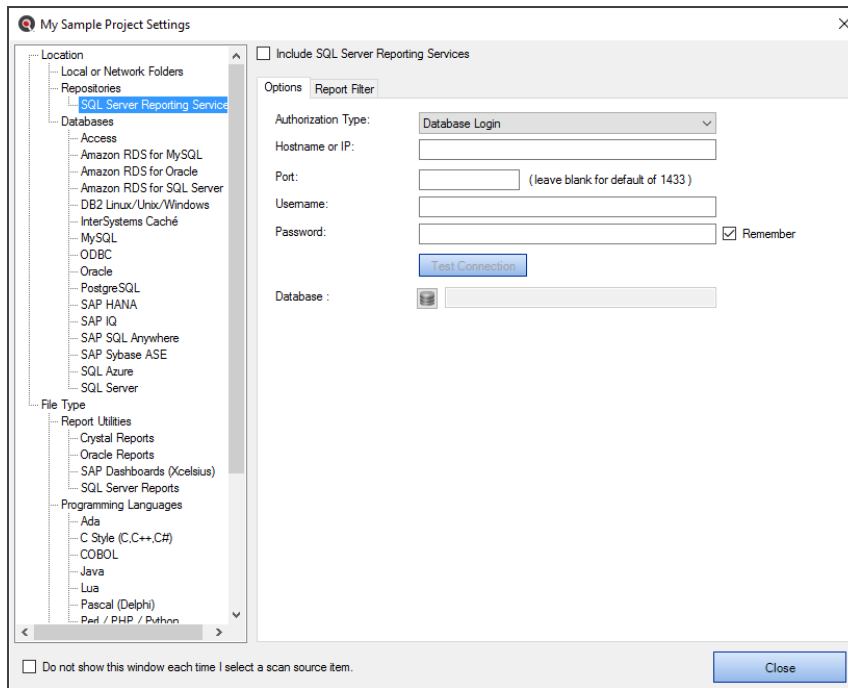
3.

4. Click on the desired repository name. In the first example below, we have selected the **BusinessObjects BI platform 4.1** repository:
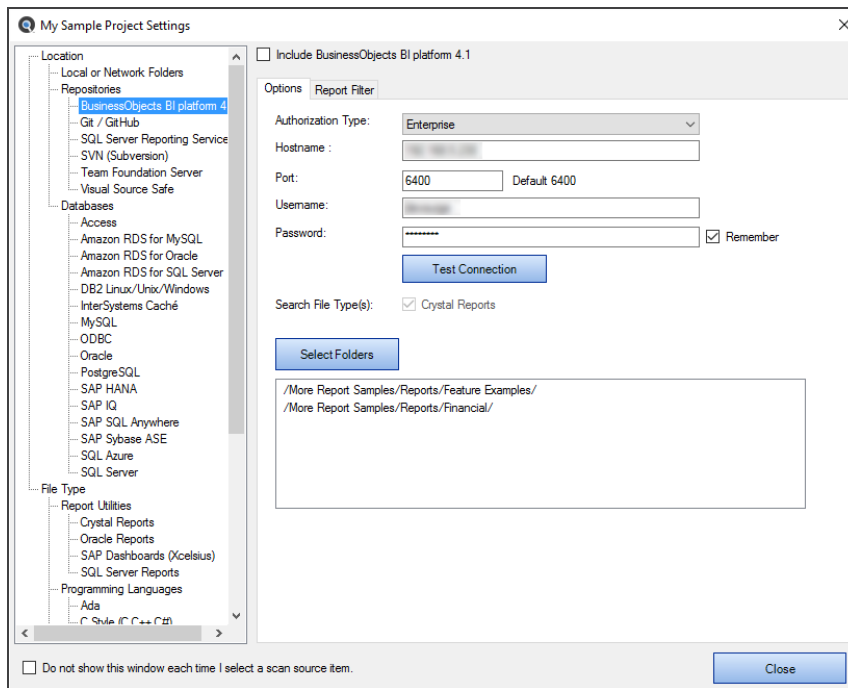
In the second example below, we have selected the **Git / GitHub** repository:
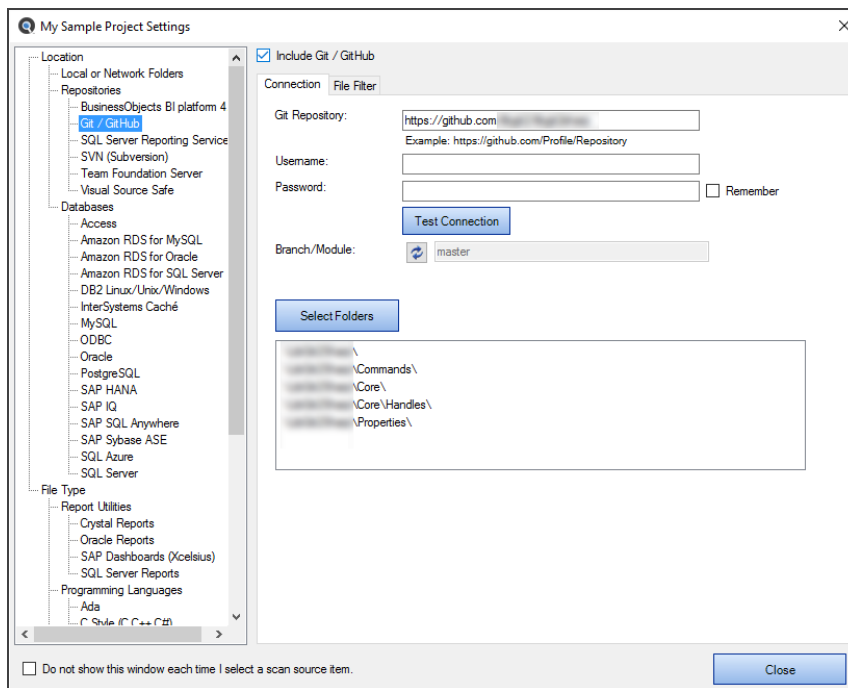
Connection Information - Repositories

1. For the selected repository, select and/or enter the required connection information. Depending upon the repository selected, these settings could include:

    - Authorization Name

    - Hostname

    - Port

    - Username

    - Password

    - Search File Type(s)

    - Git Repository

    - Branch / Module or Branch

    - Server URL or Server

    - Collection / Project or Project

2. To have Find it EZ remember your password between sessions, click to check the **Remember** check-box. The default setting is enabled (i.e. checked).

    > **Note:** If not saved, each time you start the Find it EZ program, you would be required to re-enter active project repository passwords. Otherwise, the attempt to authenticate your secure connections would fail for any index, search, compare, replace or document process.

3. Click on the Close button to apply your changes.

Test Repository Connection

To test your connection, click on the Test Connection button. A progress pop-up will appear with the following message: "Please wait, contacting the server."
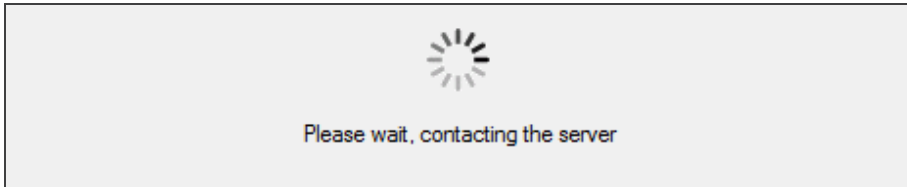
Please wait, contacting the server

1. If the test is unsuccessful, you will receive an "Unable to connect. Please check your settings and try again." message, along with a Provider Message giving more details.
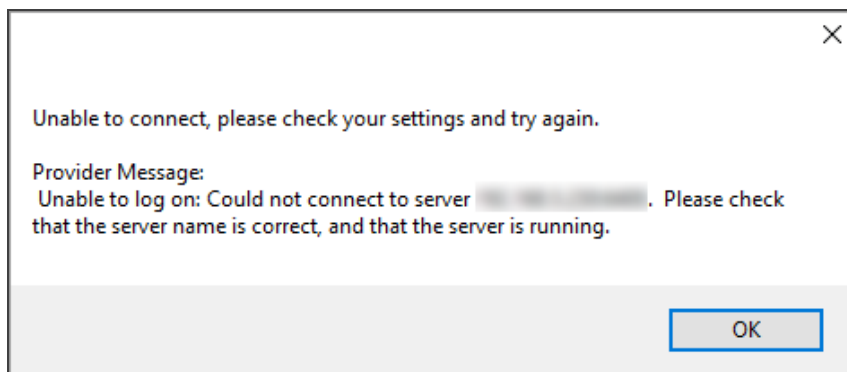
Unable to connect, please check your settings and try again.

Provider Message:
 Unable to log on: Could not connect to server ▇▇▇▇▇▇▇▇. Please check that the server name is correct, and that the server is running.

OK

> **Note:** The error handling system will provide up to two messages/alerts:
>
> - Find it EZ will indicate, in general, what happened (e.g. "Unable to connect.").
> - The called program may, at times, return a more detailed message that is proprietary to that target system and often provides you with more details to help you resolve the "why" we were unable to connect. We are not in control of the content of that message or when/if it comes back, but we will always display and log the extra details whenever possible.

2. If the test is successful, you will receive a "Connection made successfully!" message.

Connection made succesfully!

OK
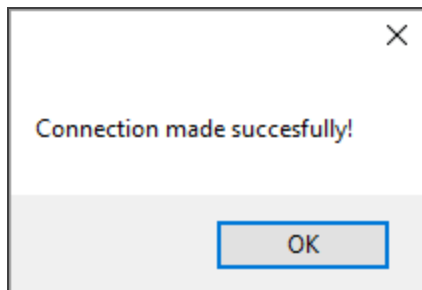
Select Repository Folders

To select folders, click on the Select Folders button. A progress pop-up will appear: "Please wait, contacting the server."

Please wait, contacting the server
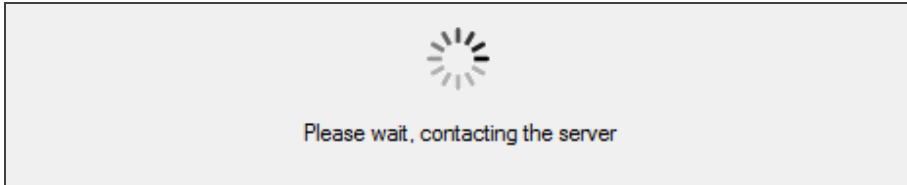
1. Once connected, a **Select Folder** pop-up will appear, showing a list of all folders included in the selected repository.
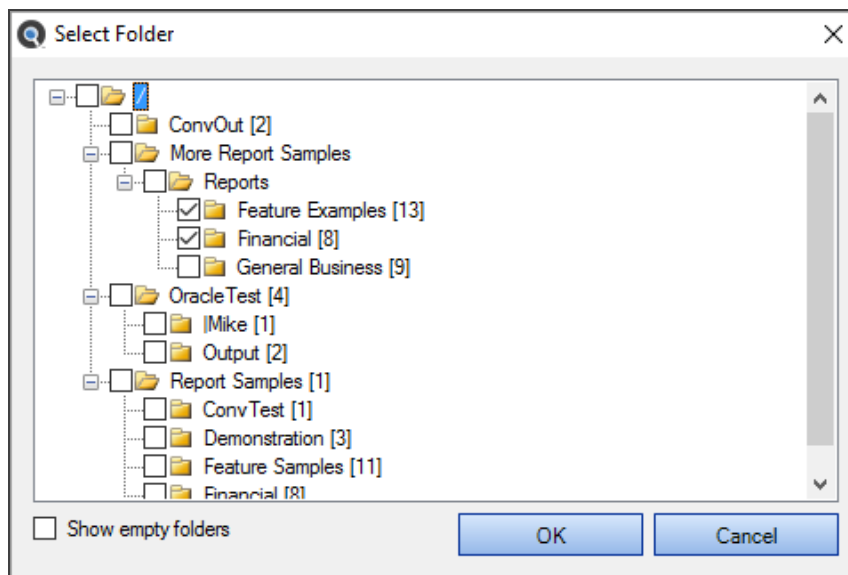
2. To show empty folders, click to check the **Show empty folders** check-box.

3. Select the desired folder(s) or sub-folder(s) by clicking to check the check-box preceding the desired folder(s).

   Tip: Clicking to check a parent folder will auto select/de-select all sub-folders.

4. Once selections have been made, click on the OK button. The selected folder(s) will appear in the folders list.

Apply Report Filter

To apply a report or file filter on a set of Repository documents to be included:

1. Open the desired Repository dialog box.
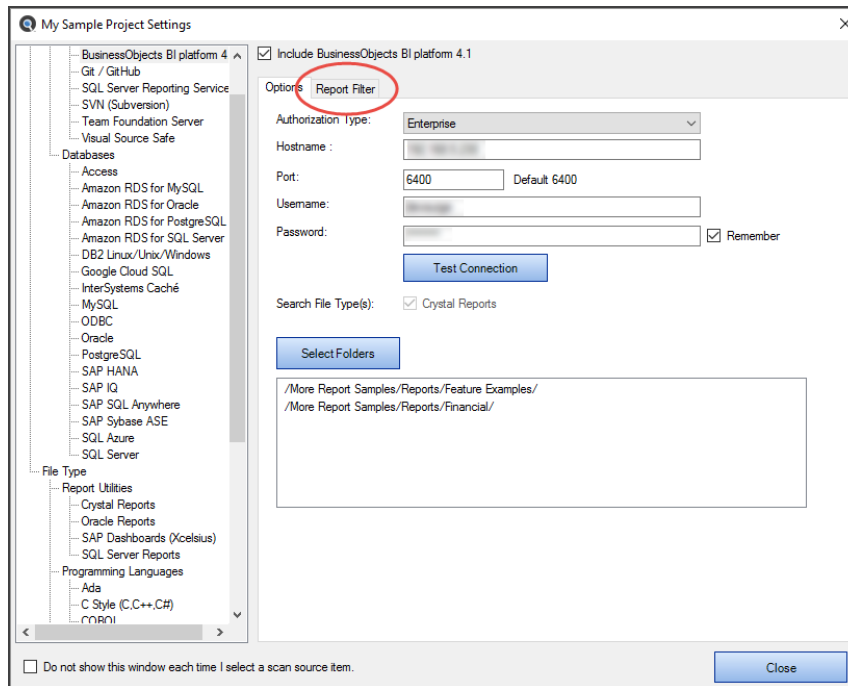
2. Click to select the **Report Filter** tab.
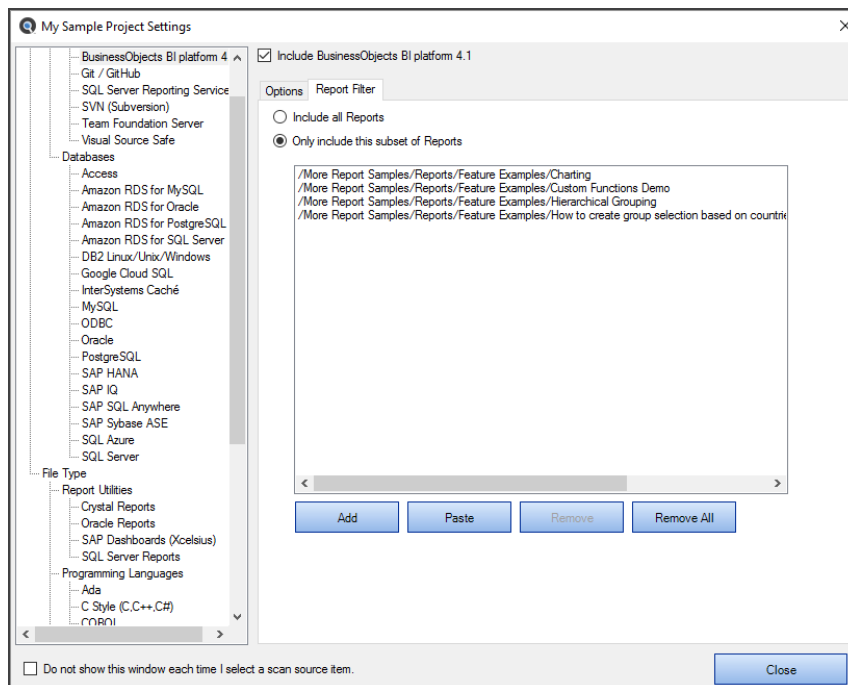
3. To include all reports, click to choose the **Include all Reports** option. This is the default selection.

   OR

4. To include only a subset of reports, click to choose the **Only include this subset of Reports** option.

5. To add a subset:

   a. Click on the Add button. An **Add Filter** pop-up will appear. The **Available Reports** list will be populated with a list of reports included in the previously selected folder(s) (on the **Options** tab).

   b. Click to select the desired report(s).

   > **Note:** Select multiple items by holding down the (**Ctrl**) key. Or, click on the **Select All** or Select None button, or the Refresh button as desired.

   OR

   c. To filter by name, use the **Filename Filter**.

      i. Click inside the **Filename Filter** text box.

      ii. Enter the desired file name filter, using wildcards as desired (e.g. *.cs, *.js, *user", etc.).
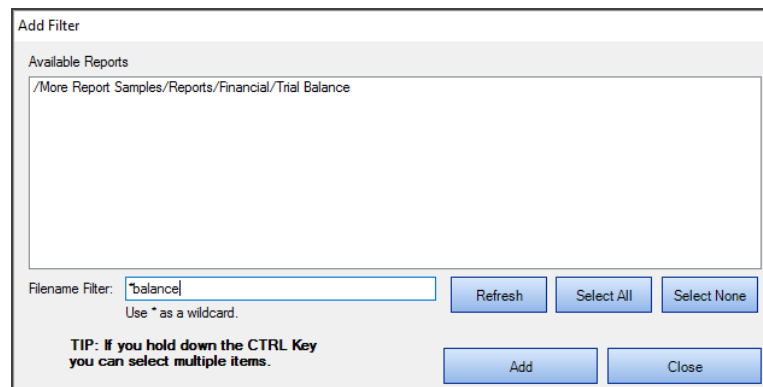
> **Note:** This filter applies to the file name itself, and does not apply to the drive letter, folders, or pathnames.

    d.   Select one or more files from the list.

> **Tip:** use the Select All button or hold down the (**Ctrl**) key then click to select multiple items.

    e.   Once complete, click on the Add button. The selected reports will be added to the **Only include this subset of Reports** list.

    f.   Repeat steps 5a through 5e to add additional files as desired.

    AND/OR

6.   To paste a subset from the clipboard:

    a.   Click on the Paste button. The clipboard contents will be added direclty to the **Only include this subset of Reports** list.

    b.   Optionally repeat Copy then Paste additional fully qualified filenames until completed.

> **Alert:** The clipboard may contain a single file list of filenames, but each line must be formatted with a fully qualified path.

7.   To remove report(s):

    a.   To remove all reports from the list, click on the Remove All button.

    b.   To remove selected report(s) from the list, click to highlight the reports you want to remove, then click on the Remove button.

8.   Click on the Close button to apply your changes.

> **See Also:**
>
> • "Apply File Filter" on page 140

Databases

This section describes the procedures required to include the databases source in a project, enter database connection information, test a database connection, reset search defaults, open results with the desired viewer/editor, and apply various database search filters.

To access project settings for databases:

1. Edit the active project using the `Projects -> Settings` menu.
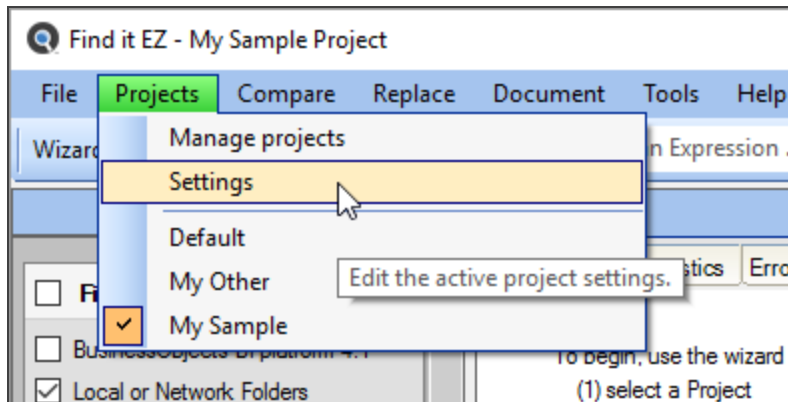
2. In the frame on the left, in the **Location** category, locate the **Databases** sub category.

> **Note:** You may access the same dialog box with a simple right-click on the desired database in the expanded **Source** panel on the left of the main application screen.
>
>
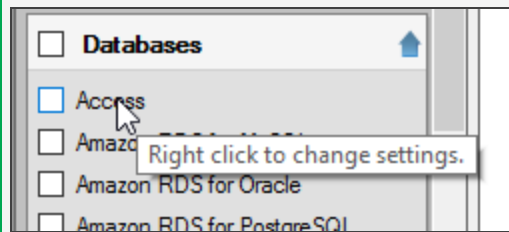
3. Click on the desired database name. In the first example below, we have selected the **Oracle** database:
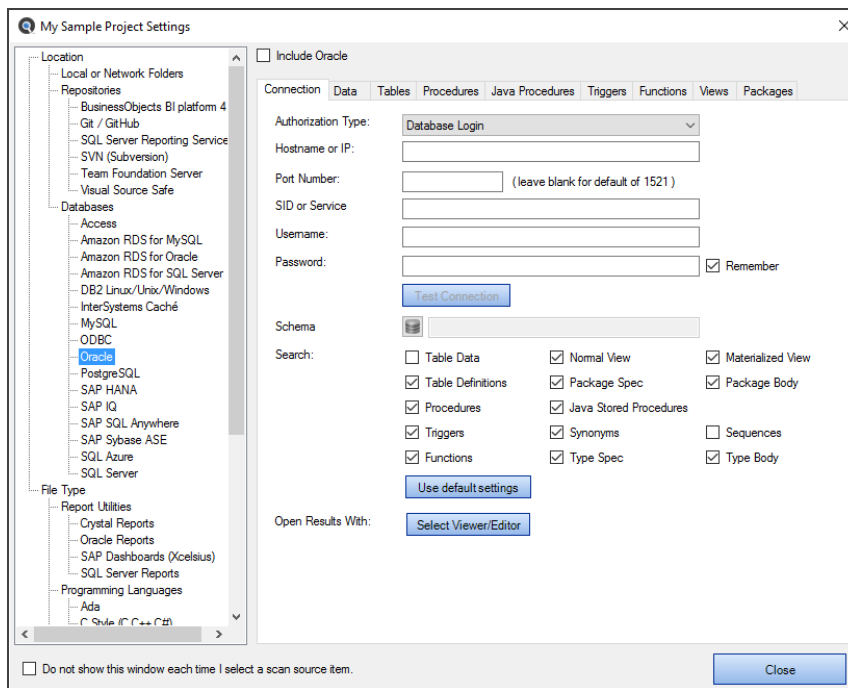
In the second example below, we have selected the **SQL Server** database:
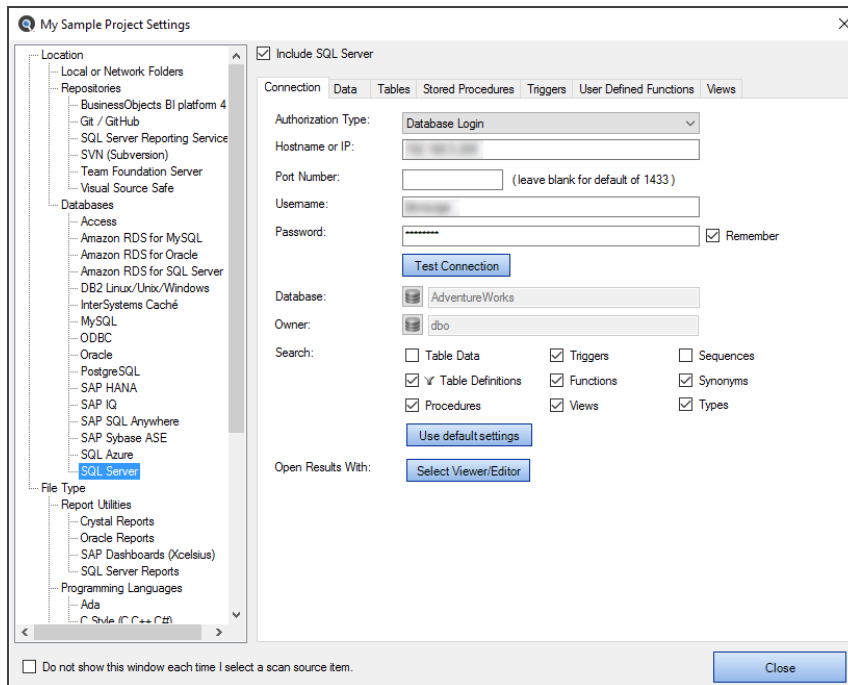
Connection Information - Databases

1. For the selected database, select and/or enter the required connection information. Depending upon the database selected, these settings could include:

    - File Extensions Searched
    - Password
    - Search [Options]
    - Hostname or IP
    - Port Number
    - Username
    - Database
    - Authorization Type
    - SID or Service
    - Schema
    - Owner
    - Classes
    - DSN
    - Instance Number

2. To have Find it EZ remember your password between sessions, click to check the **Remember** check-box. The default settings is enabled (i.e. checked).

   > **Note:** If not saved, each time you start the Find it EZ program, you would be required to re-enter active project database connection passwords. Otherwise, the attempt to authenticate your secure connections would fail for any index, search, compare, replace or document process.

   > **Alert:** Passwords are not saved in plain-text; however, if you chose to save passwords, it is recommended that you make an effort to secure access to the configuration database.

3. Click on the Close button to apply your changes.

Test Database Connection

To test your connection, click on the Test Connection button.

Please wait, contacting the server
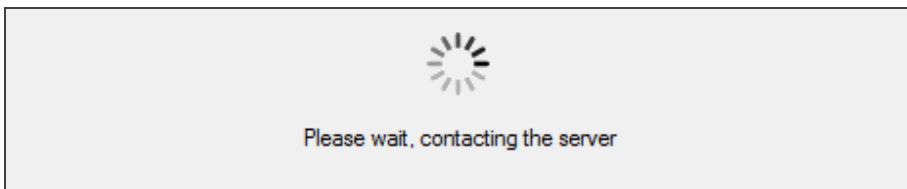
1. If the test is unsuccessful, you will receive an "Connection failed!" message, along with a Reason. Check your settings and try again.

   > **Note:** The error handling system will provide up to two messages/alerts:

- Find it EZ will indicate, in general, what happened (e.g. "Unable to connect.").
- The called program may, at times, return a more detailed message that is proprietary to that target system and often provides you with more details to help you resolve the "why" we were unable to connect. We are not in control of the content of that message or when/if it comes back, but we will always display and log the extra details whenever possible.
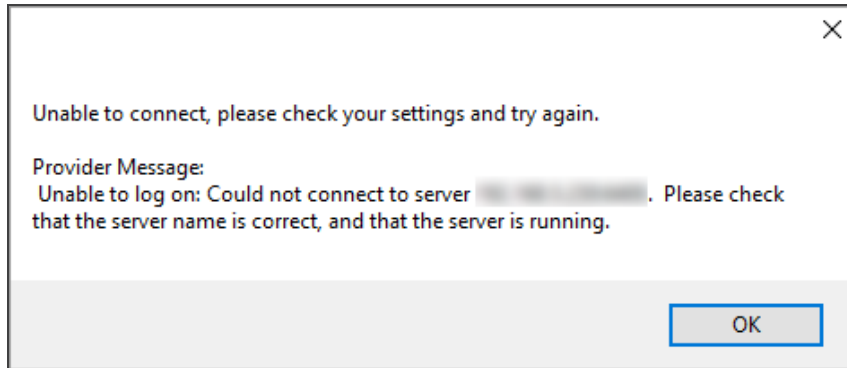
2. If the test is successful, you will receive a "A connection was made successfully!" message.
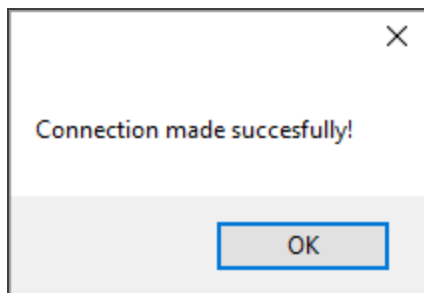
Reset Search Defaults

On the database **Connection** tab or BI Reports **Options** tab (see links below), the **Search** section contains a number of items for which you can search. To include a set of database objects, select an item and click to check the preceding check-box.

For each database type, there is a set of default database objects normally used for code change impact analysis. To restore the selections to the default settings that came with your Find it EZ install, click on the Reset search defaults button. This will also reset all individual database object filters to "include all items".

Note: If any one of the default items are not selected, or if a subset of objects are filtered, the corresponding **Source** item in the main application left panel will indicate this by including a **Filter** next to the **Source** item. This allows you to quickly identify when the source database objects are filtered and may not include all documents as configured.

Open Results With

To specify the viewer/editor with which you want to open search results for the selected database, locate the **Open Results With** field and click on the corresponding Select Viewer/Editor button.
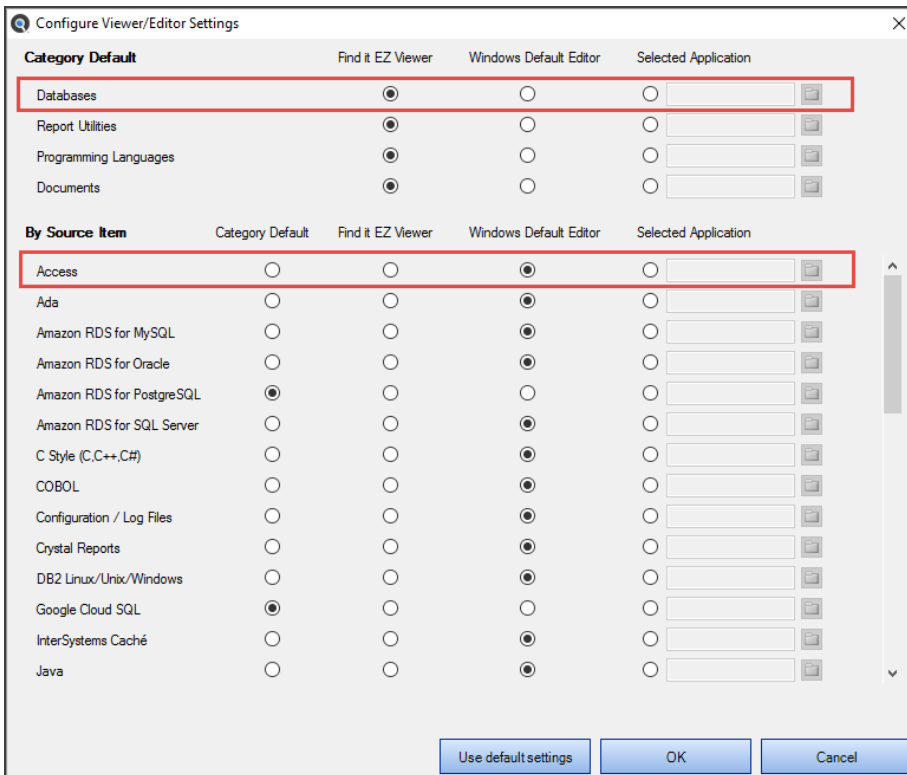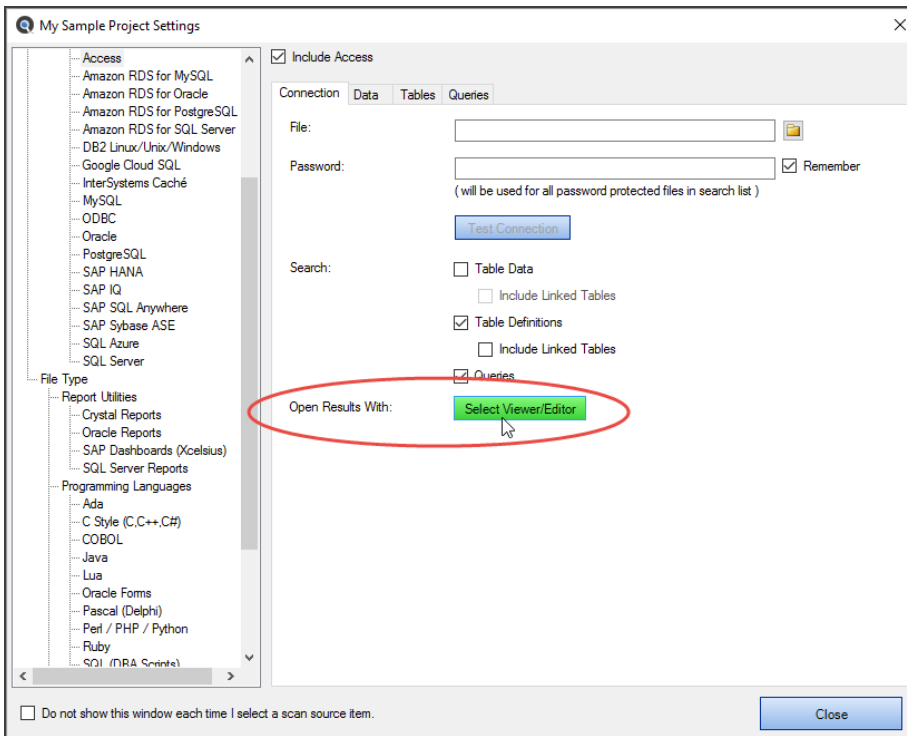
Apply Database Item Filters

Depending upon the database selected, you may be presented with a number of filter options from which to choose, including:

- Data
- Tables
- Stored Procedures
- Triggers
- User Defined Functions
- Views
- Java Procedures
- Functions
- Packages
- Events

Each of these tabs allow you to select between including all corresponding database object items, or only specific subset of items. This allows you to expedite the subsequent (re)indexing process as well as reduce false-positive matches in your search results.

Click on the desired filter tab (see examples below).

You may use the **File Filter** tab to include only a subset of specific files within the configured path(s). You must first add the desired source path folders. This filter is often used to minimize false postives or expedite indexing and searching by limiting the number of file contents included in a project. This setting can be quickly changed to include all or a subset of files as needed.

To apply a Data filter:

1. Open the desired **Database** dialog box.
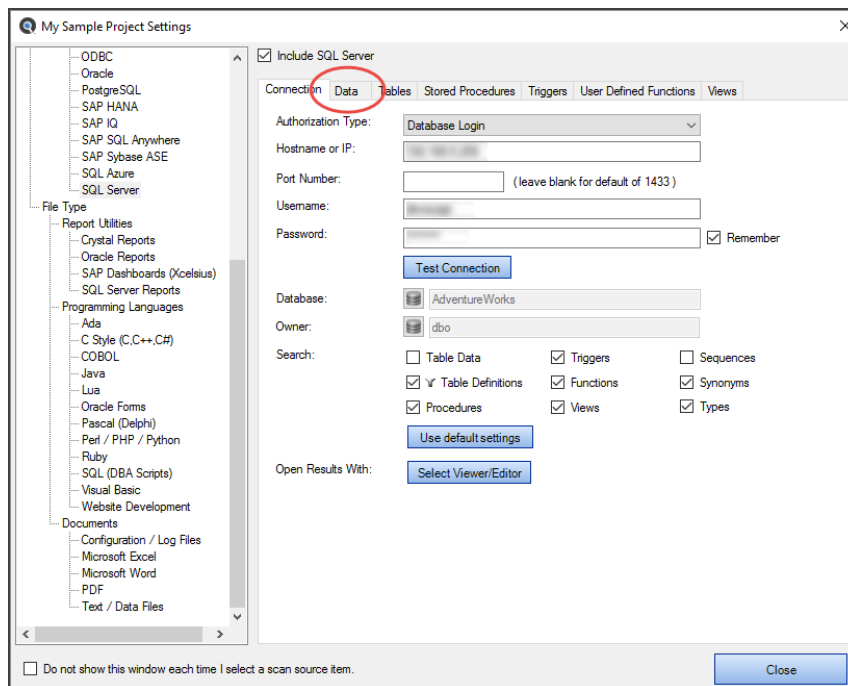
2. Click to select the desired **Data** tab.
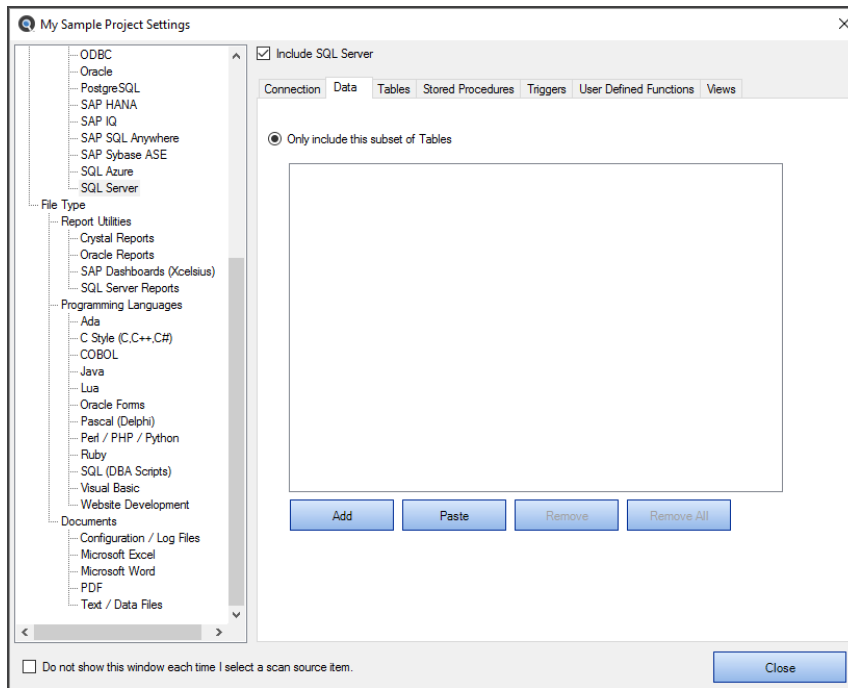
3. To add a subset:

a. Click on the Add button. An **Add Filter** pop-up will appear.
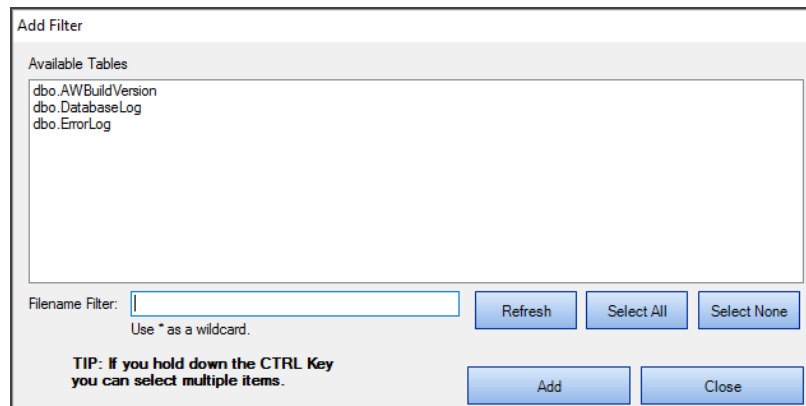
The **Available Tables** list will be populated with a list of tables included in the folders selected previously on the **Options** tab.

b. Click to select the desired table(s).

Note: Select multiple items by holding down the Ctrl key. Or, click on the Select All button or the Select None button, or the Refresh button as desired.

   c.   To filter by table name, use the **Filename Filter**:

       i.   Click inside the **Filename Filter** text box.

      ii.   Enter the desired file name filter, using wildcards as desired (e.g. *.cs, *.js, *user*, etc.).

> **Note:** This filter applies to the table name itself, and does not apply to the drive letter, folders or pathnames.

   d.   Select one or more items from the list.

> **Tip:** Use the Select All button or hold the (**Ctrl**) key then click to select multiple items.

   e.   Once complete, click on the Add button. The selected tables will be added to the **Only include this subset of Tables** list.

   f.   Repeat steps 3a through 3e to add additional tables as desired.

   AND/OR

4.   To paste a subset from the clipboard:

   a.   Click on the Paste button. The clipboard contents will be added directly to the **Only include this subset of Tables** list.

   b.   Optionally repeat Copy then Paste additional fully qualified filenames until completed.

> **Alert:** The clipboard may contain a single file or list of filenames, but each line must be formatted with a fully qualified path.

5.   To remove file(s):

   a.   To remove all files from the list, click on the Remove All button.

   b.   To remove only selected table(s) from the list, click to select the table(s) you want to remove, then click on the Remove button.

6.   Click on the Close button to apply your changes.

> **Note:** Normally, including database table data is disabled by default. However, in some systems it may be necessary to include searching the contents of some system tables that either contain dynamic programming logic/code, or that may contain type codes or other application related content you wish to include in your change impact analysis. Because this can drastically affect indexing size and search performance, you must select the subset of specific system tables. Searching all database tables is not recommended.

To apply a Stored Procedures filter:

1. Open the desired **Database** dialog box.
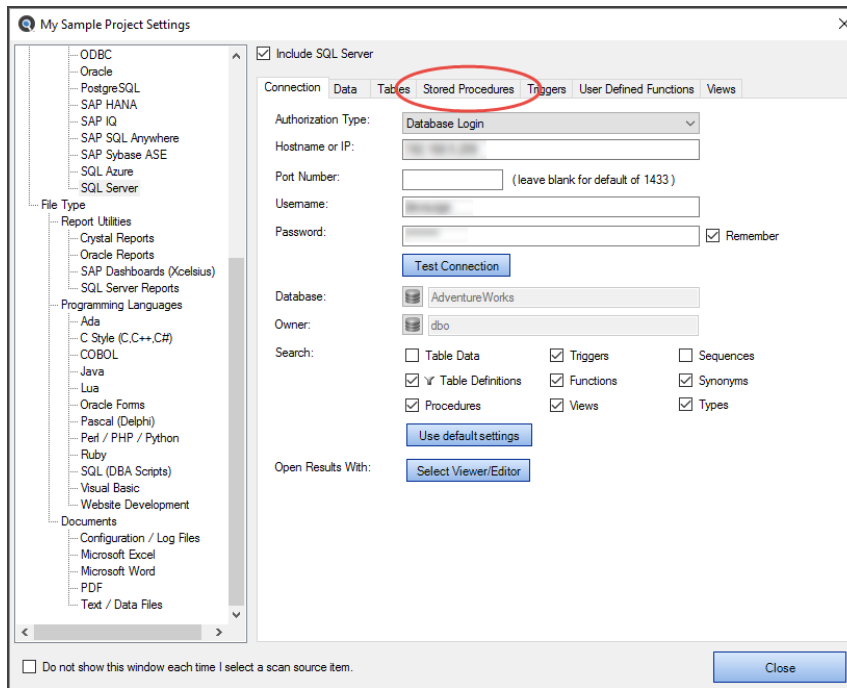
2. Click to select the **Stored Procedures** tab.
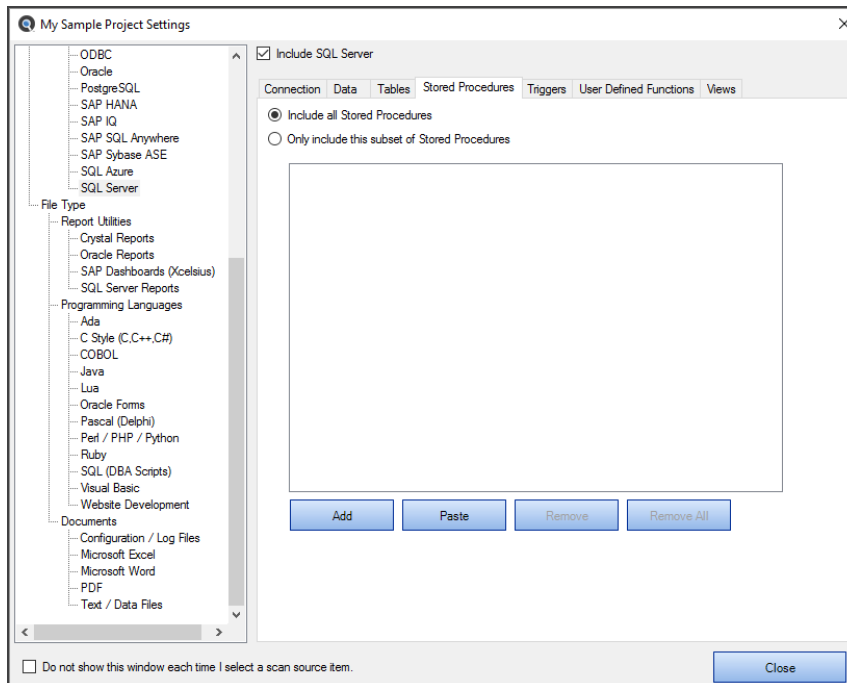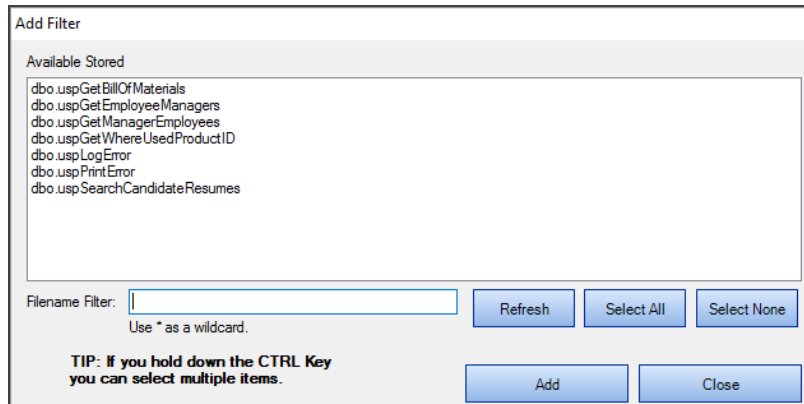
3. To include all stored procedures, click to choose the **Include all Stored Procedures** option. This is the default selection.

   OR

4. To include only a subset of files, click to choose the **Only include this subset of Stored Procedures** option.

5. To add a subset:

   a. Click on the Add button. An **Add Filter** pop-up will appear.

   Add Filter

   Available Stored

   dbo.uspGetBillOfMaterials
   dbo.uspGetEmployeeManagers
   dbo.uspGetManagerEmployees
   dbo.uspGetWhereUsedProductID
   dbo.uspLogError
   dbo.uspPrintError
   dbo.uspSearchCandidateResumes

   Filename Filter: [   ]   Refresh   Select All   Select None
   Use * as a wildcard.

   **TIP: If you hold down the CTRL Key
   you can select multiple items.**   Add   Close

   The **Available Stored Procedures** list will be populated with a list of stored procedures included in the folders selected previously on the **Options** tab.

   b. Click to select the desired stored procedure(s).

   > **Note:** Select multiple items by holding down the (**Ctrl**) key. Or, click on the Select All button or the Select None button, or the Refresh button as desired.

   c. To filter by file name, use the **Filename Filter**:

      i. Click inside the **Filename Filter** text box.

      ii. Enter the desired file name filter, using wildcards as desired (e.g. *.cs, *.js, *user*, etc.).

      > **Note:** This filter applies to the stored procedure name itself, and does not apply to the drive letter, folders or pathnames.

   d. Select one or more items from the list.

   > **Tip:** Use the Select All button or hold the (**Ctrl**) key then click to select multiple items.

   e. Once complete, click on the Add button. The selected stored procedures will be added to the **Only include this subset of Stored Procedures** list.

   f. Repeat steps 5a through 5e to add additional stored procedures as desired.

   AND/OR

6. To paste a subset from the clipboard:

   a. Click on the Paste button. The clipboard contents will be added directly to the **Only include this subset of Stored Procedures** list.

   b. Optionally repeat Copy then Paste additional fully qualified filenames until completed.

> **Alert:** The clipboard may contain a single file or list of filenames, but each line must be formatted with a fully qual-ified path.

7. To remove file(s):

    a. To remove all files from the list, click on the Remove All button.

    b. To remove only selected stored procedure(s) from the list, click to select the stored procedures you want to remove, then click on the Remove button.

8. Click on the Close button to apply your changes.

> **Tip:** Each of the database item filters, other than "table data", work in the same way as a file filter. However, when using wildcards to select database objects some include the object schema or owner in the format: owner.objectname . You may filter the selection list to include all objects belonging to a specific owner as follows: owner.*

See Also:

- "Apply File Filter" on page 140
- "Viewer / Editor Settings" on page 52
- "BI Reports" below
- "Search an Oracle Database" on page 223
- "Search a SQL Server Database" on page 227

File Type

This section provides detailed steps required to configure project settings for Programs, Documents, and BI Reports.

BI Reports

This section describes the procedures required to include the BI Reports source files, reset defaults, download optional connectors, and open search results with the desired viewer/editor.

Report files can be physically stored in one of three Locations:

- Local or network folders.
- Report Scheduling database repositories, such as SAP BusinessObjects Enterprise Server or a SQL Server Reporting Ser-vices database.
- Version control system repositories, such as git, TFS, etc.

To include selected report type files in a Project, you must also select and configure one or more of the possible locations these cor-responding files can be stored within.

To access project settings for BI Reports:

1. Edit the active project using the **Projects -> Settings** menu.
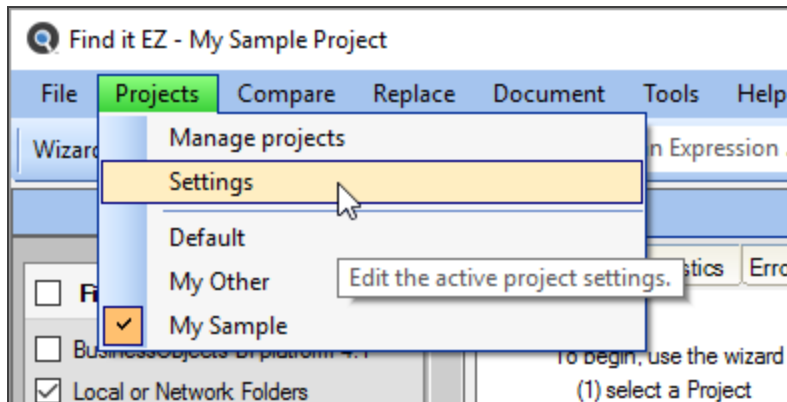
2. In the frame on the left, in the **File Type** category, locate the **BI Reports** sub category.

> **Note:** You may access the same dialog box with a simple right-click on the desired report utility in the expanded Source panel on the left of the main application screen.
>
>
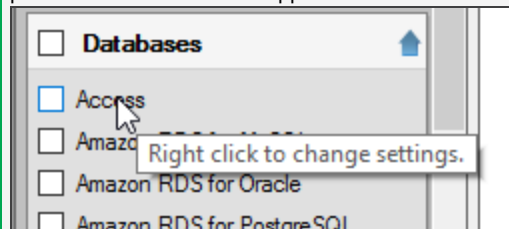
3. Click on the desired report utility. In the example below, we have selected the **Crystal Reports** report utility:
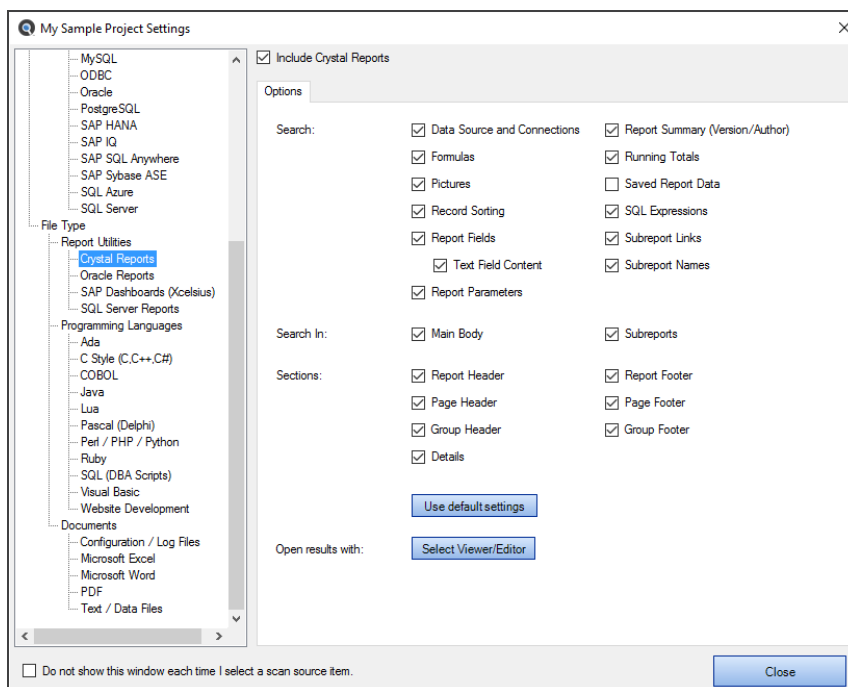
Note: The Use default settings button resets the sections and search items to the most common used program settings.

The steps required to configure individual settings for each report utility are similar to other file type source items. Each report utility uses a unique document model to organize and manage code and content design. For BI report designers familiar with each tool, these report sections and page layout areas will be familiar. You may include all or a subset of these items to limit the scope of document contents indexed and/or searched.

Note: The Use default settings button resets the sections and search items to the most common used program settings.

To specify the viewer/editor with which you want to open search results for the selected report utility, locate the **Open Results With** field and click on the corresponding Select Viewer/Editor button.
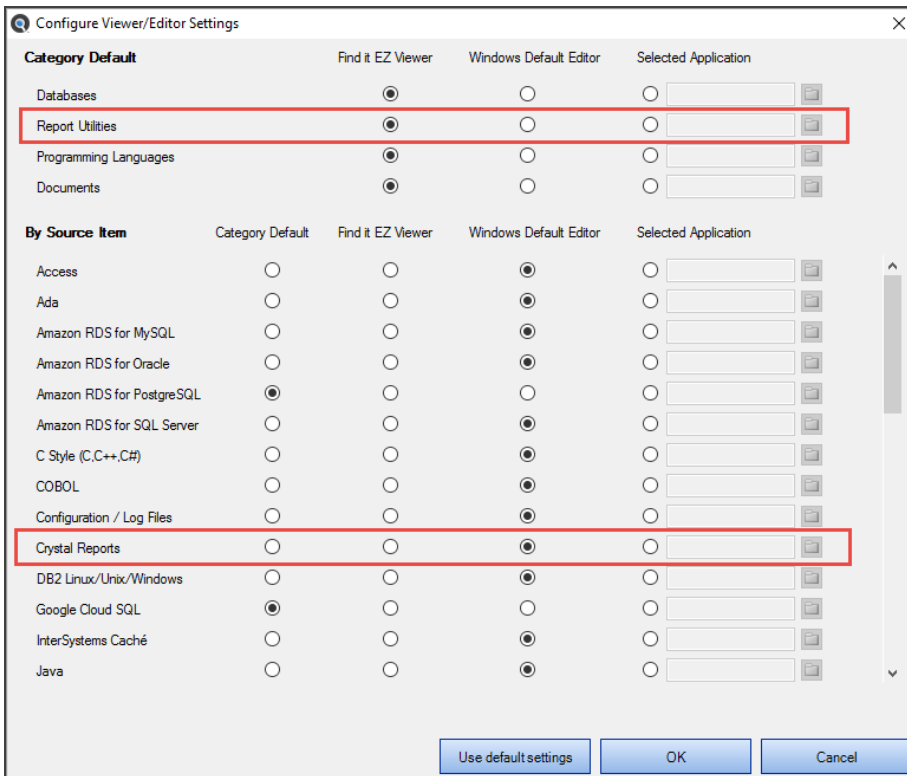
See Also:

- "Viewer / Editor Settings" on page 52
- "File Locations and Source Settings" on page 129
- "Download Connectors" on page 280
- "Create a SQL Statements Detail Extract" on page 232
- "Create a Database Cross-Reference List" on page 240
- "Identify reports using a specified connection" on page 254
- "Find text in a text box in a Crystal Report" on page 258

Programs

This section describes the procedures required to include various programming language source code files in a project, add or remove file extensions searched, and open results with the desired viewer/editor.

Programming language source code files can be physically stored in one of two Locations:

- Local or network folders.
- Version control system repositories, such as git, TFS, etc.

To include selected programming language source code files in a Project, you must also select and configure one or more of the possible locations these corresponding files can be stored within.

To access project settings for Programs:

1. Edit the active project using the **Projects -> Settings** menu.
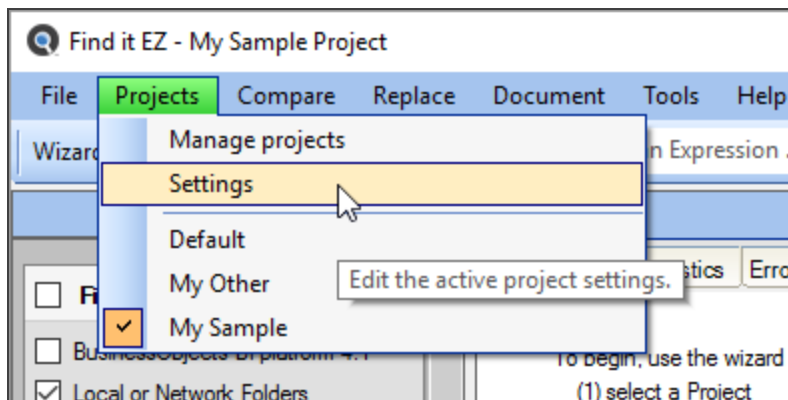
2. In the frame on the left, in the **File Type** category, locate the **Programs** sub category.

> **Note:** You may access the same dialog box with a simple right-click on the desired programming language in the expanded **Source** panel on the left of the main application screen.
>
>
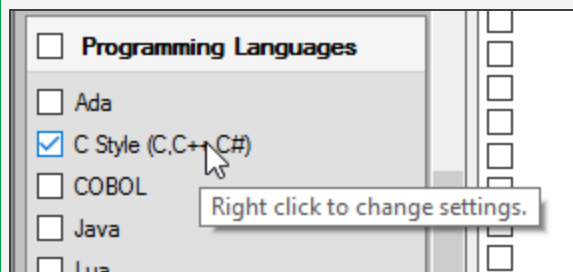
3. Click on the desired programming language. In the example below, we have selected the **C Style (C,C++,C#)** programming language:
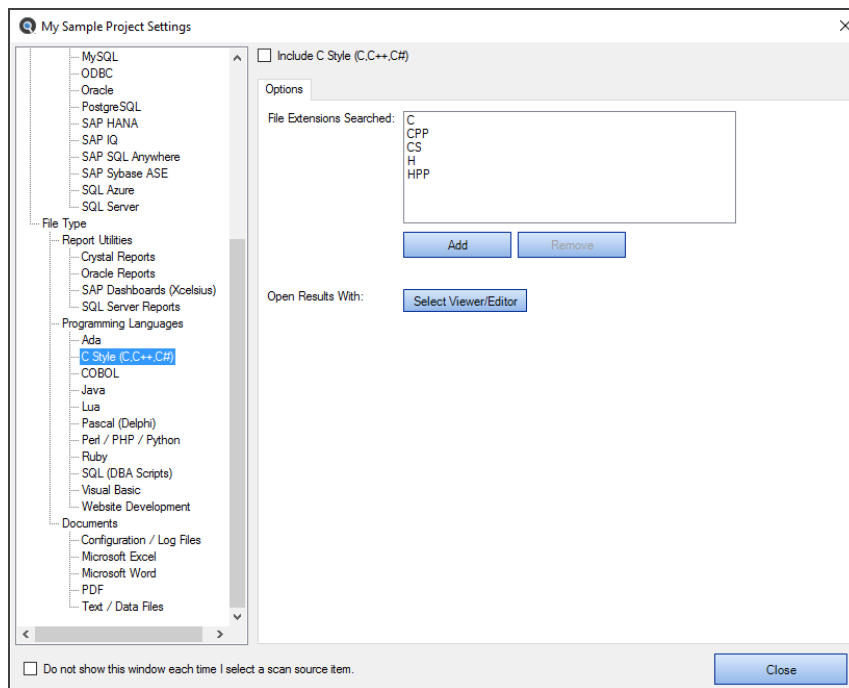
Add or Remove File Extensions Searched

Within many organizations, corporate file-naming standards are often used for common programming language functions. You may apply the same syntax-aware parsing of content for a given programming language by adding these file extensions to the corresponding source item.
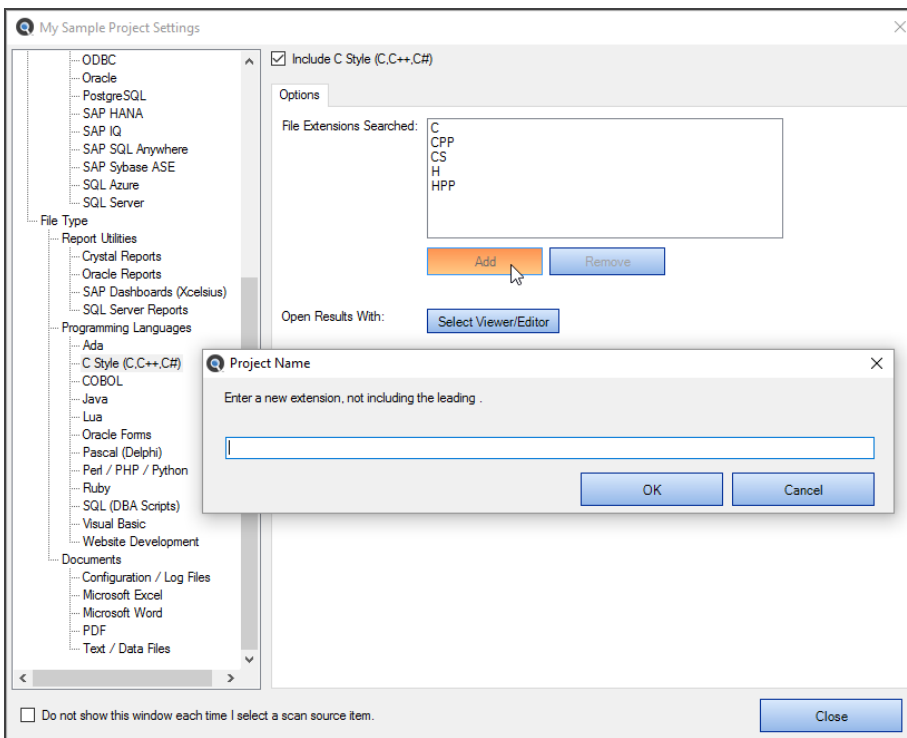
1. To add a file extension:

    a. Click on the `Add` button. A pop-up will appear (as above).

    b. Enter the name of the new file extension (without the leading ".").

    > **Note:** You may only associate (add) each unique custom filename extension to a single programming language. So, for example, if you wanted to associate the file extensions "sam" to be parsed as a Java file, it can not also be added to any other **Source** item. Once added, all files with the ".sam" extension would then be parsed as "Java" content files in this example.

    c. Click on the `OK` button. The new file extension will be added to the **File Extensions Searched** list.

2. To remove a file extension:

    a. In the **File Extensions Searched** list, click to select the file extension you want to remove.

    b. Click on the `Remove` button. The selected file extension will be removed from the list.

    > **Alert:** You will not be able to remove any of the standard default file extensions associated with each Programming Language.

3. To apply your changes, click on the `Close` button.

See Also:

- "Viewer / Editor Settings" on page 52
- "File Locations and Source Settings" on page 129

Documents

This section describes the procedures required to include the documents source in a project, add or remove file extensions searched, open results with the desired viewer/editor, and select Microsoft Excel search scope options (where applicable).

Application logs, data files and office documents can be physically stored in one of two Locations:

- Local or network folders.
- Version control system repositories, such as git, TFS, etc.

To include selected documents in a Project, you must also select and configure one or more of the possible locations within which these corresponding files can be stored.

To access project settings for documents:

1. Edit the active project using the **Projects -> Settings** menu.
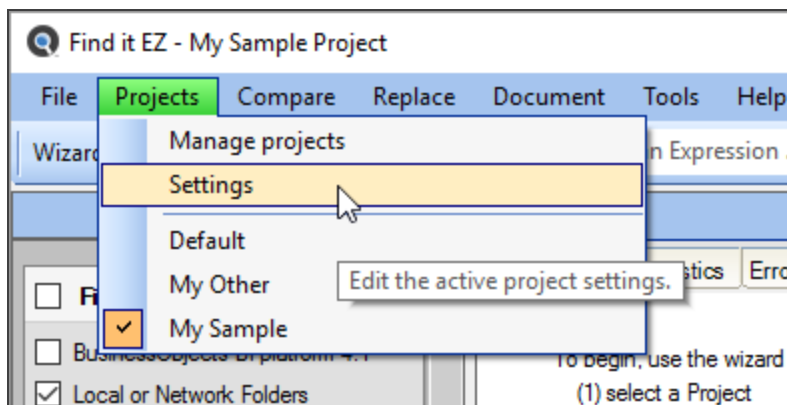
2. In the frame on the left, in the **File Type** category, locate the **Documents** sub category.

Note: You may access the same dialog box with a simple right-click on the desired document type in the expanded **Source** panel on the left of the main application screen.
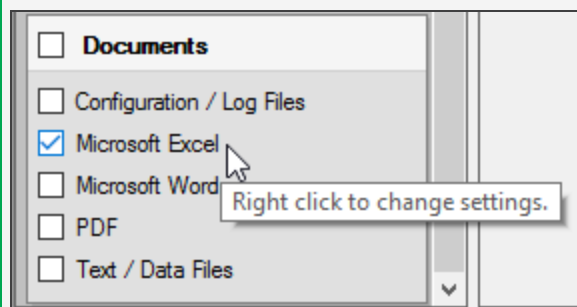
3. Click on the desired document type. In the example below, we have selected the **Microsoft Excel** document type:
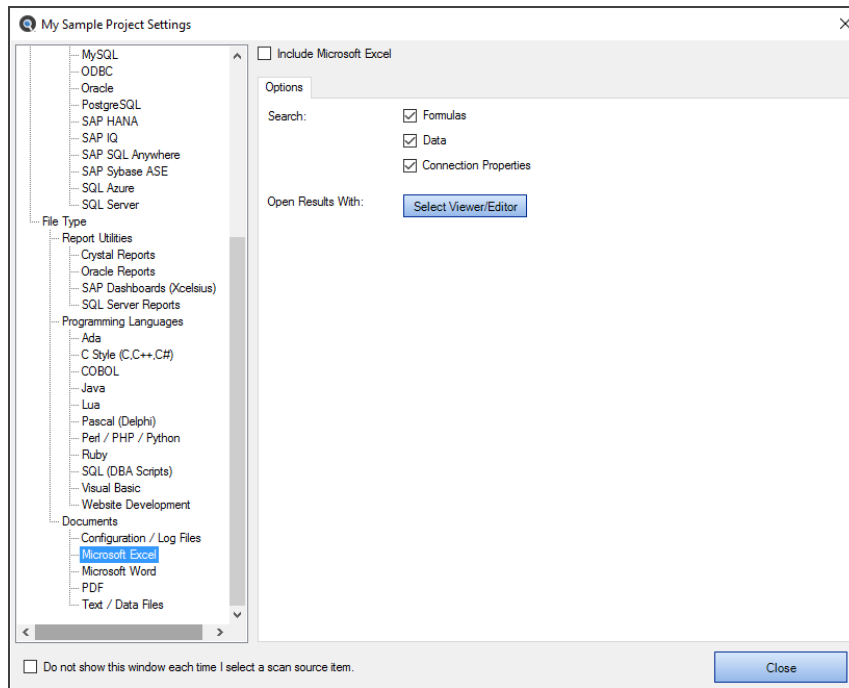
Microsoft Excel Search Options

Note that when the **Microsoft Excel** source is selected, you are able to select from the following **Search** options to optimize search performance and reduce false-positive matches:

- Formulas - include cell formula content
- Data - include visible cell data content
- Connection Properties - include Excel workbook datasource connection information

To include content from these items, click to check the preceding check-box (un-check to exclude).

Add or Remove File Extensions Searched

You may add additional file type extensions to be searched as "plain text" included in either Configuration / Log Files or Text / Data Files.
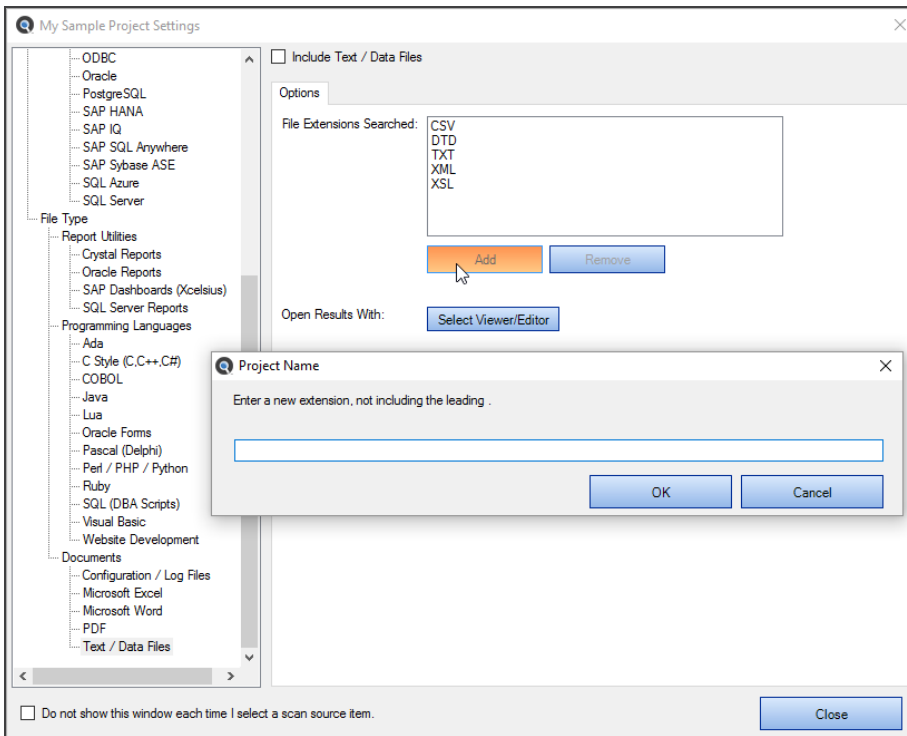
1. To add a file extension (where applicable):

   a. Click on the Add button. A pop-up will appear (see above).

   b. Enter the name of the new file extension (without the leading ".").

   > **Note:** You may only associate (add) each unique custom filename extension to a single source item.

   c. Click on the OK button. The new file extension will be added to the **File Extensions Searched** list.

2. To remove a file extension:

   a. In the **File Extensions Searched** list, click to select the file extension you want to remove.

   b. Click on the Remove button. The selected file extension will be removed from the list.

   > **Alert:** You will not be able to remove any of the standard default file extensions associated with each Document type.

3. To apply your changes, click on the Close button.

See Also:

Work With Search Results

This section describes the procedures required to view search results, statistics, and errors; to search within documents, to view search result details; and to save, open, copy, modify, export, and print search results.

View Search Results

1. Perform a search.

2. Results matching your search criteria will be shown in the **Results** window. Use the horizontal scroll bar located below the window to view all result data columns.
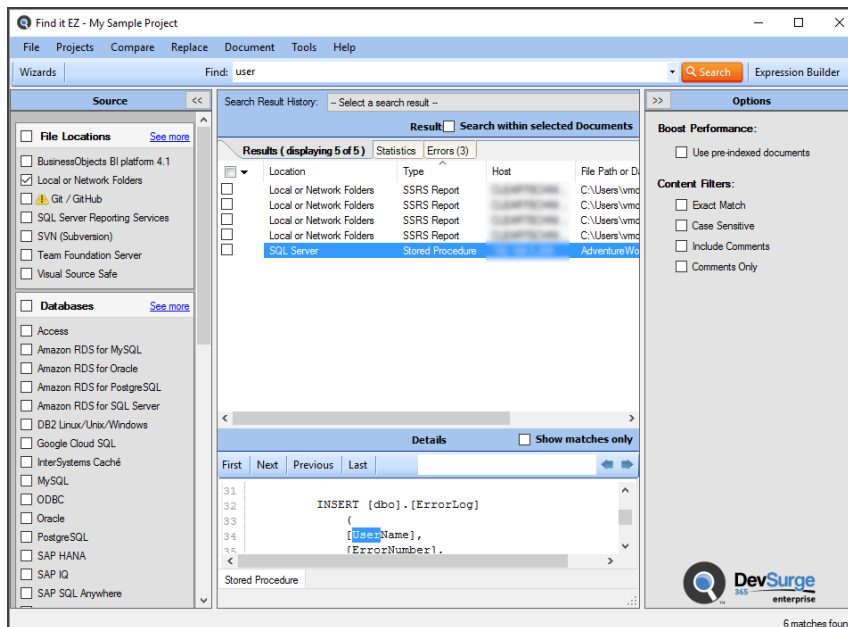
> **See Also:**
> - "Wizards Overview" on page 68
> - "Perform a Regular Search" on page 109

View Search Result History

After running several consecutive searches, to view previous (unsaved) search results prior to closing the program:

> **Note:** In order for the **Search Result History** field to appear, you must have completed more than one search since the last time you opened the Find it EZ program. This list of historical results is unlimited, but is automatically cleared when you exit the program.

1. At the top of the **Results** window, click on the **Search Result History** field. A drop-down list will appear, showing a list of unsaved search result records tagged by date and time.
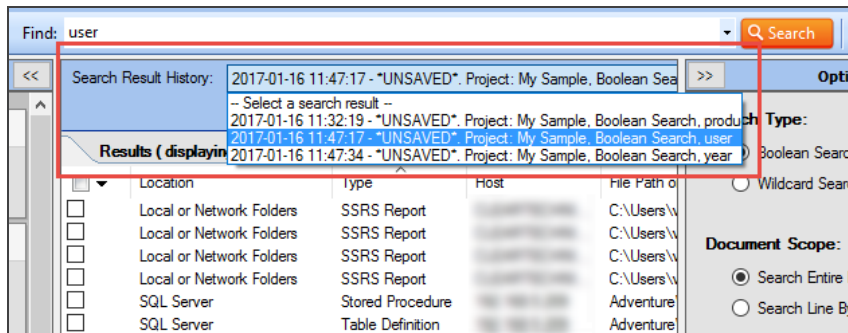
2. Locate and click on the desired search result record. The corresponding search results will appear in the **Results** window and will include any annotations or items marked complete.

View Result Source

Open Result

1. To open the details of a matching search result with either the built-in code viewer or selected default file type editor::

    a. In the **Results** window, locate and double-click on the result for which you want to open the source.
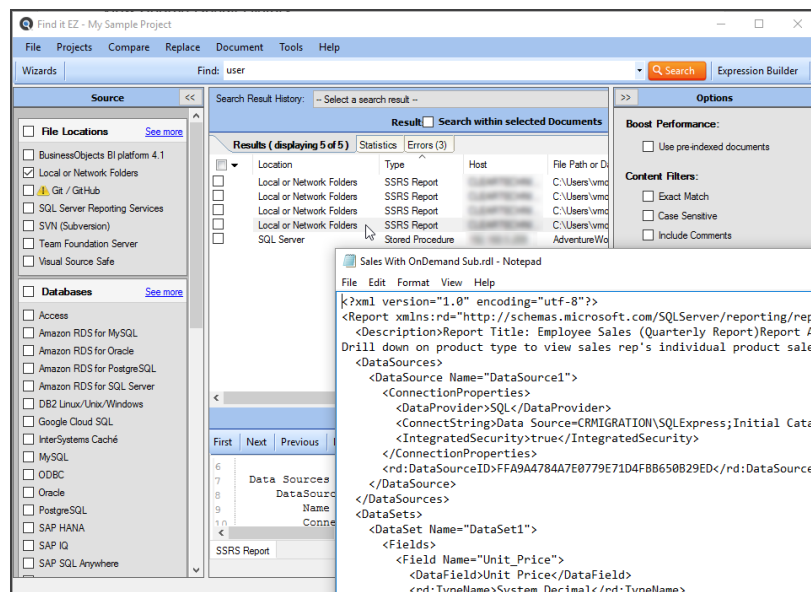
OR

b. Right-click on the result and select **Open Result** from the context menu.
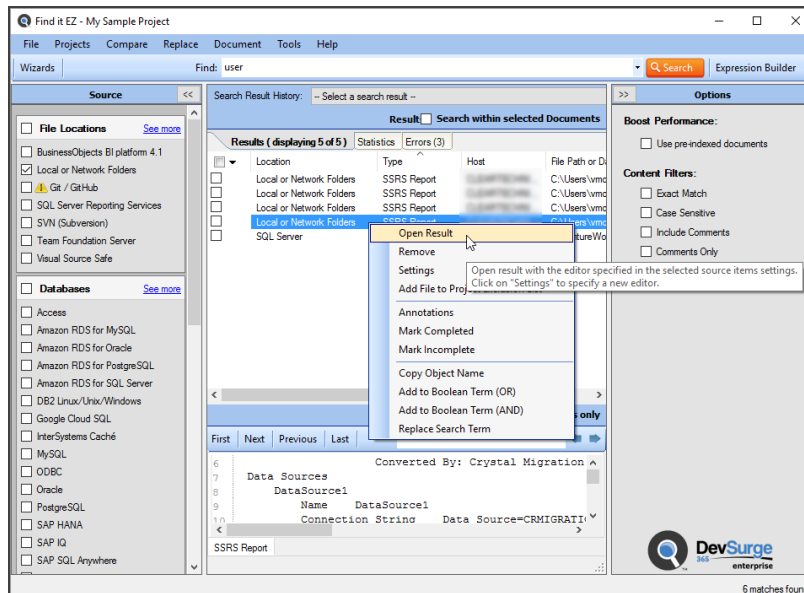
2. The result will open in the pre-selected viewer/editor depending upon the file type.

> **See Also:**
>
> • "Viewer / Editor Settings" on page 52

Find it EZ Result Viewer

The Find it EZ **Result Viewer** allows you to view the source code for a search result document. This section describes the steps required to open the viewer, change a location or group, navigate search results, find a file, and view or edit the source code in another program.

Open Find it EZ Result Viewer

If "Find it EZ Viewer" is selected for the source **Category Default** or **By Source Item** in "Viewer / Editor Settings" on page 52, then when you "View Result Source" on the previous page, it will appear in the Find it EZ Result Viewer (see examples to follow). Text matching your search criteria (i.e. matches) is highlighted in yellow.

Navigate Search Results
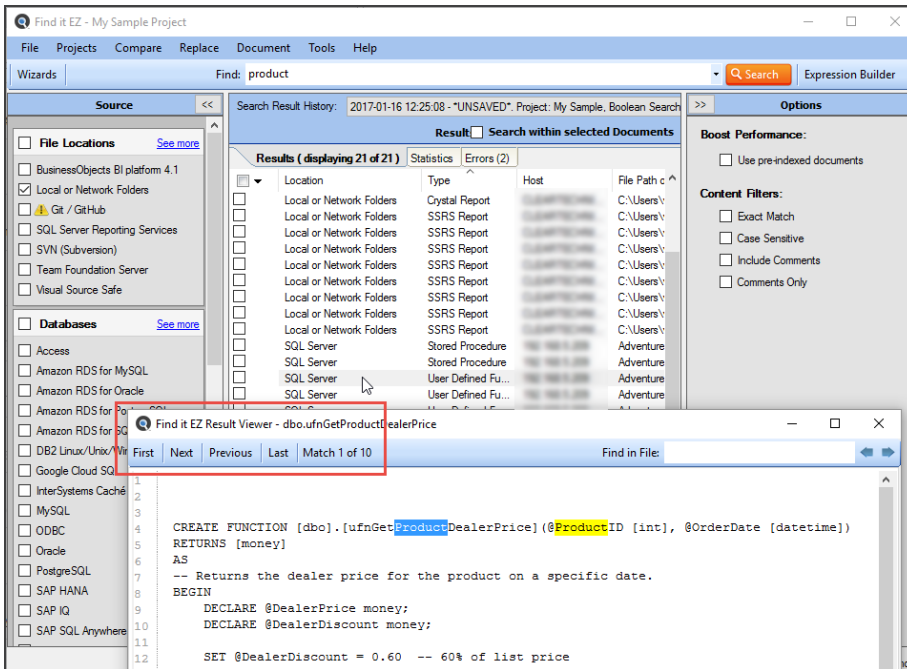
To navigate through the matches found in your document, click on the **First**, **Next**, **Previous**, or Last buttons located at the top left of the viewer. Note that a counter to the right of the buttons keeps track of which match you are viewing; e.g. "Match 7 of 9."

Find in File

To search within the result document:

1. Enter the desired search text into the **Find in File** text box.
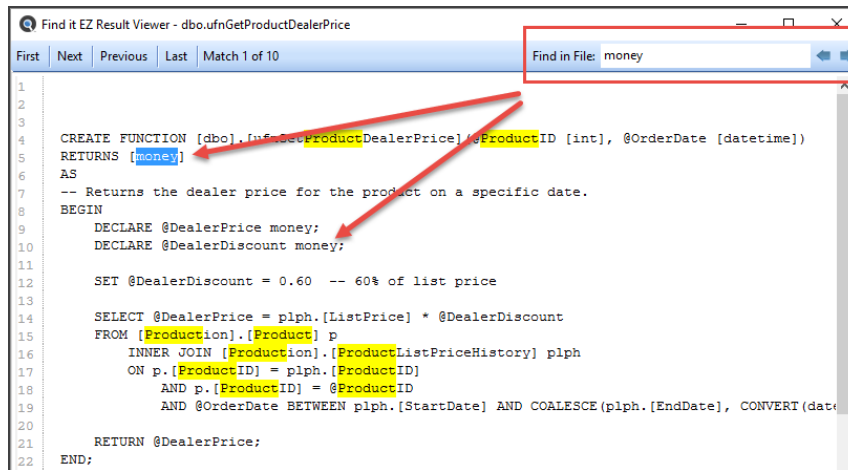
2. Click on the left arrow (find previous) or right arrow (find next) button. OR, press the ⎡**Enter**⎤ key on your keyboard to 'find next.'

3. Items matching your search criteria will be highlighted in blue. Click on the right arrow button or press **Enter** to navigate through the matches found.

Documents with Multiple Tabs

The Find it EZ **Result Viewer** for some documents will contain multiple tabs. For an Excel workbook, there is one tab per worksheet (e.g. **Sheet 1**) plus a tab for workbook details (**Workbook Info**; including database connections, etc.). For other documents, you normally only have a single tab with highlighted code. For SAP Dashboards, this will contain a minimum of 3 tabs: Code viewer (Dashboard code definition) + Excel worksheet + Excel workbook info (connection/author). See example below.

Search, Results, and Details panel:
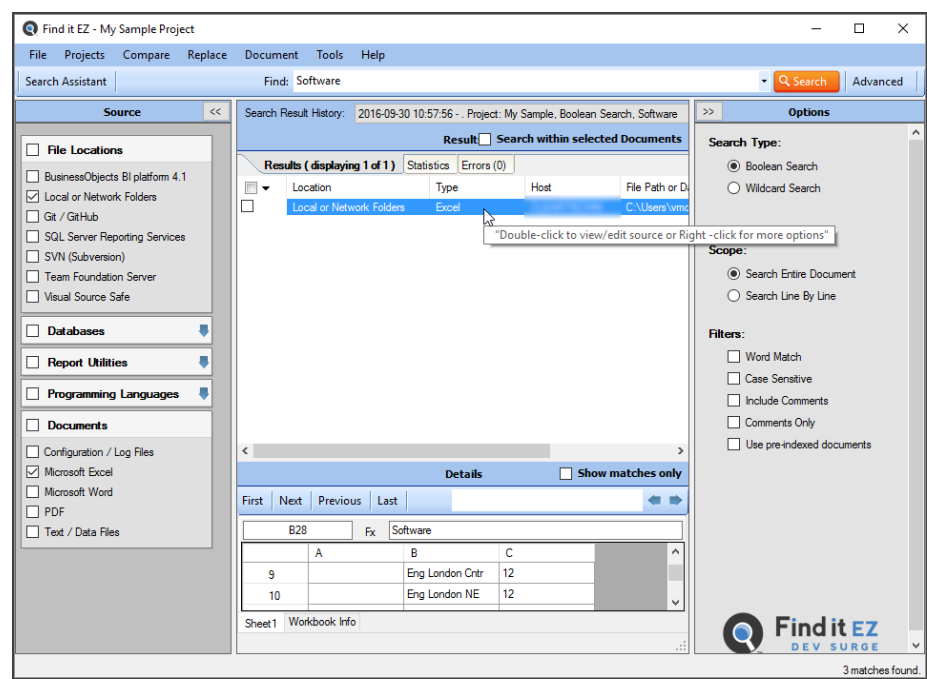
To open the Find it EZ**Result Viewer**, right-click on the workbook in the **Details** panel and select _Open_ from the context menu. Or, double-click on the workbook.

Result Viewer Tabs:
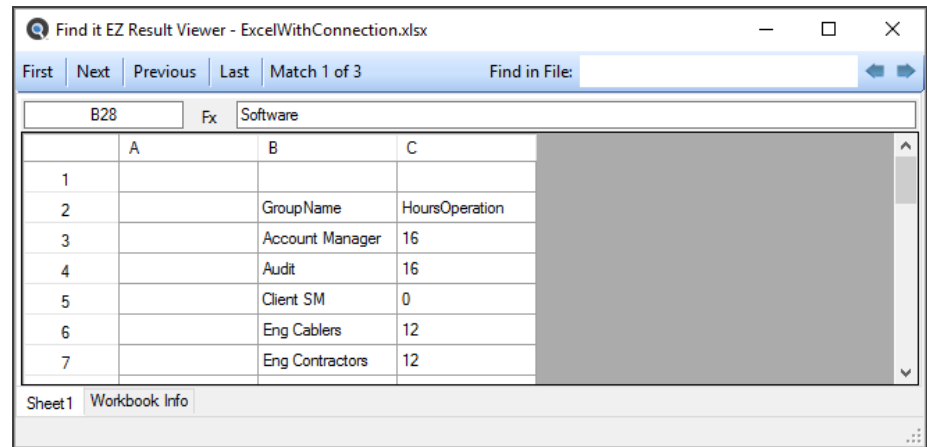
Workbook Info tab:
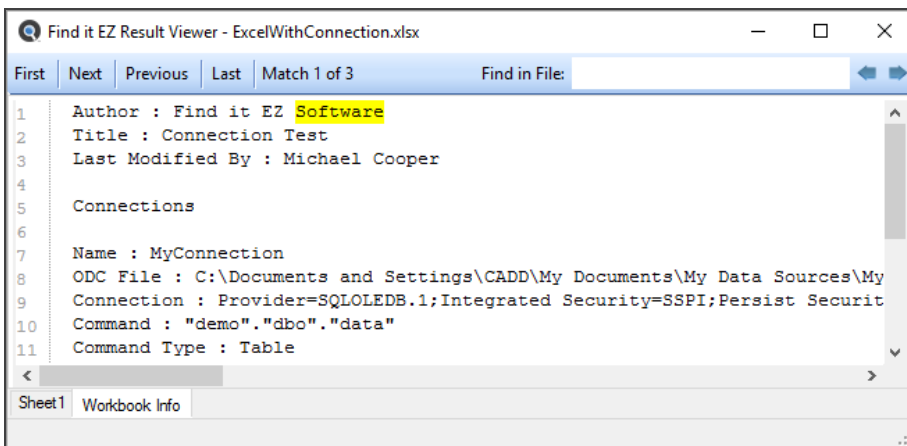
Select All Results or None

1. In the header of the check-box column, click on the down arrow button. A context menu will appear. See below:
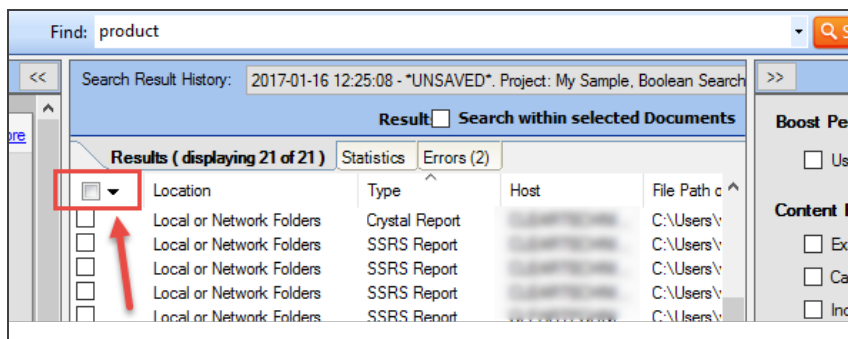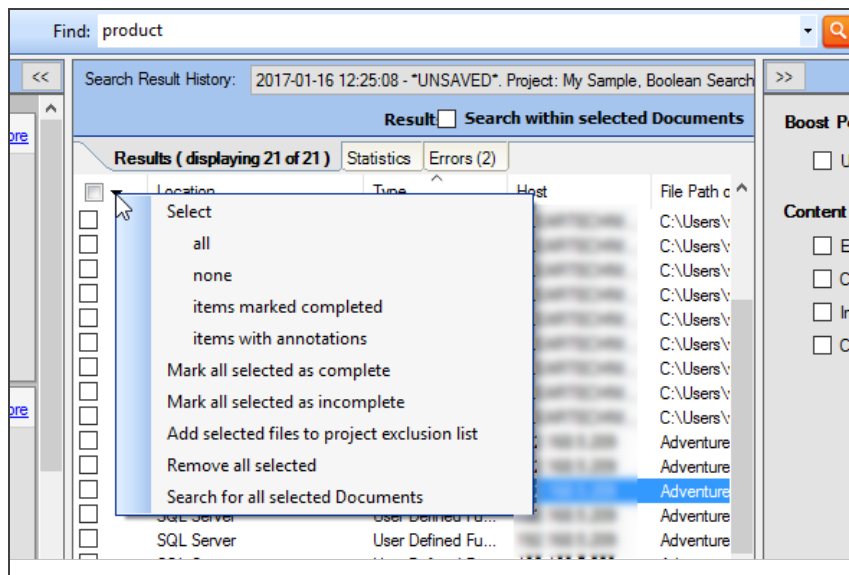
2. To select all results:

   - From the menu, choose **_Select -> All_**. All results will be selected (checked).

3. To de-select all results:

   - From the menu, choose **_Select -> None_**. All check-boxes will be cleared.

Search for All Selected Objects

1. In the check-box column, click to select (check) the result objects for which you want to search your project for references.
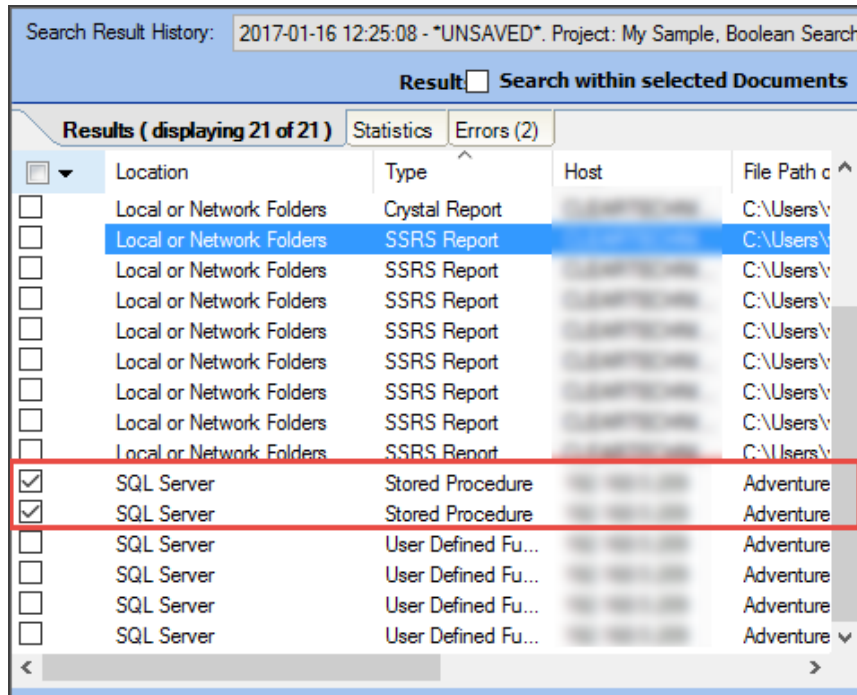
2. In the header of the check-box column, click on the down arrow button. A context menu will appear.
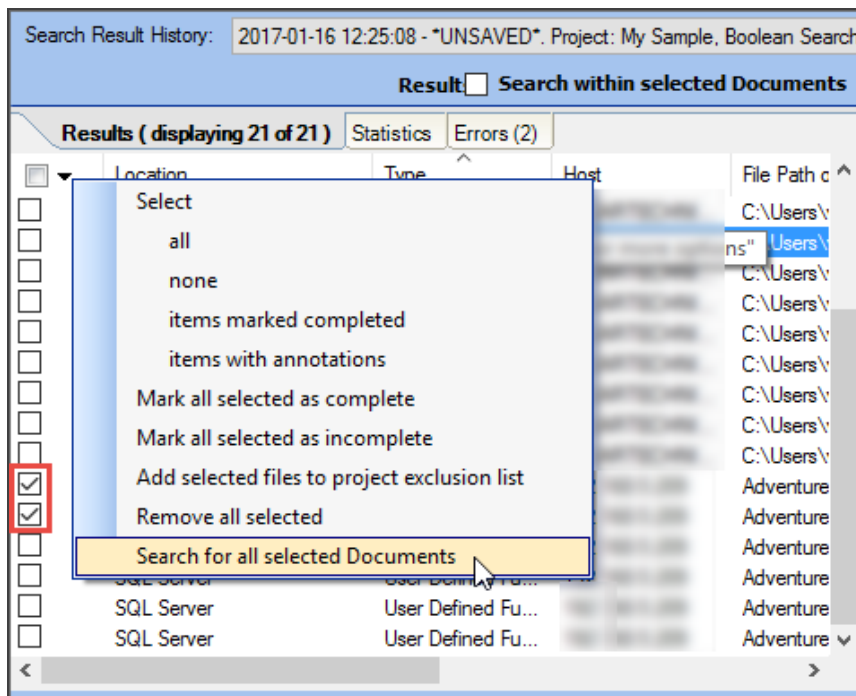
3. From the menu, select **Search for all selected Documents**. A **Continue** notification message will appear.
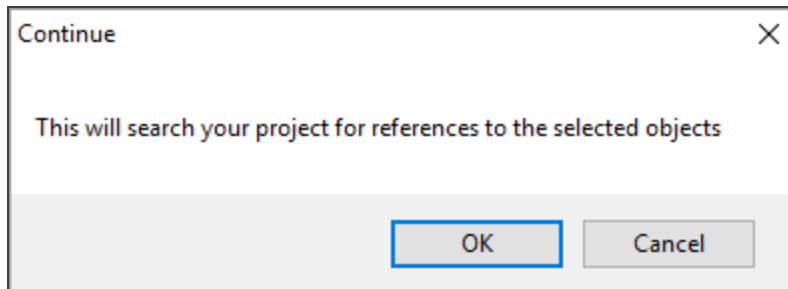
4. To launch the search, click on the OK button. The search will proceed, and any results will appear in the **Results** window.

    OR

5. To cancel, click on the Cancel button.

Open Viewer and Editor Settings

To access project settings from the **Results** window:

1. In the **Results** window, right-click on any result. A context menu will appear.
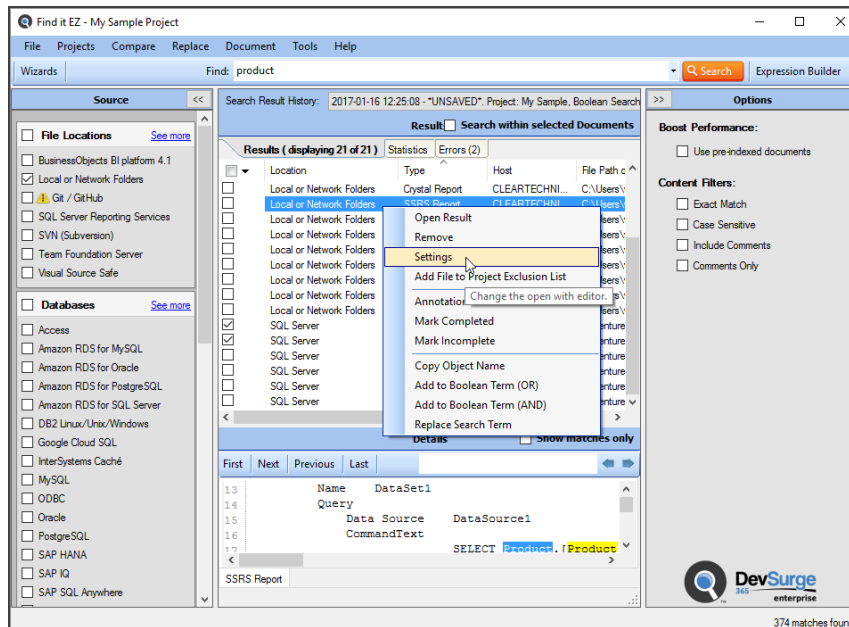
2. From the menu, click to select _Settings_ . The **Configure Viewer/Editor Settings** pop-up will appear.
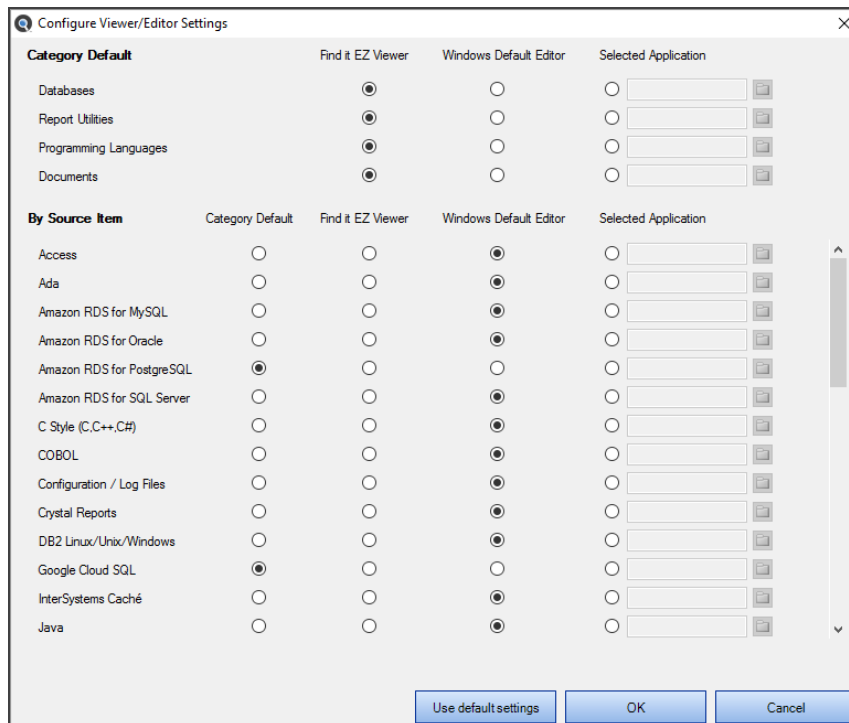
Search Within Result Documents

There are times when an initial search expression will yield results with false-positive matches; or, within which a secondary search for additional terms will pinpoint what you are looking for. To search within only a subset of search result documents:

1. At the top of the **Results** window, click to check the **Search within Documents** check-box.
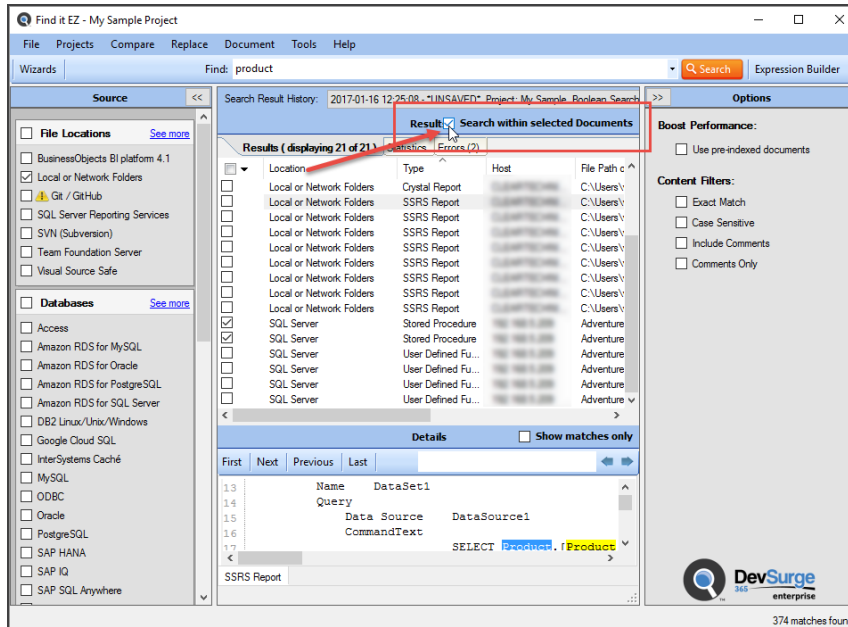
2. On the search bar, enter the desired search text into the **Find** text box.

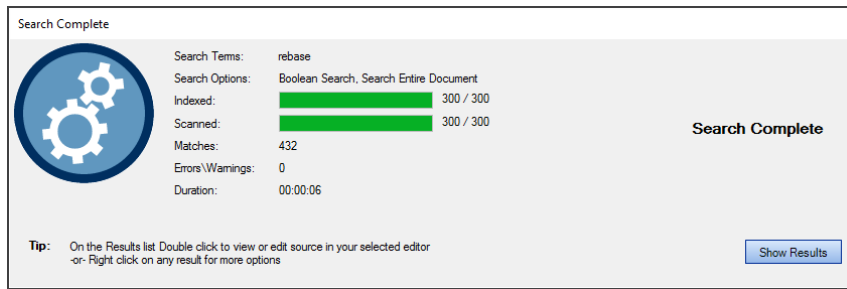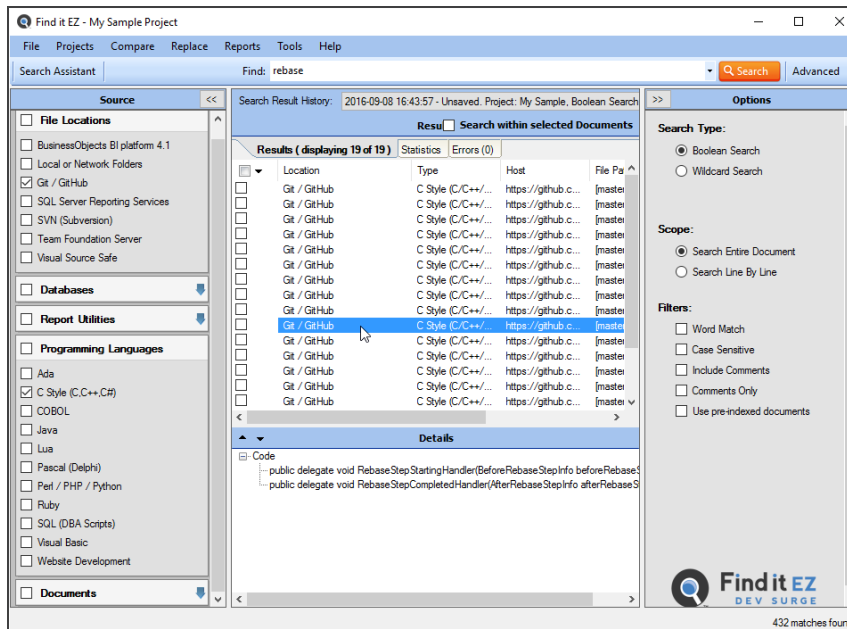3. Click on the Search button to initiate the search. A **Searching** dialog box will appear, showing the status of the search.

4. Once complete, the **Search Complete** dialog box will appear.
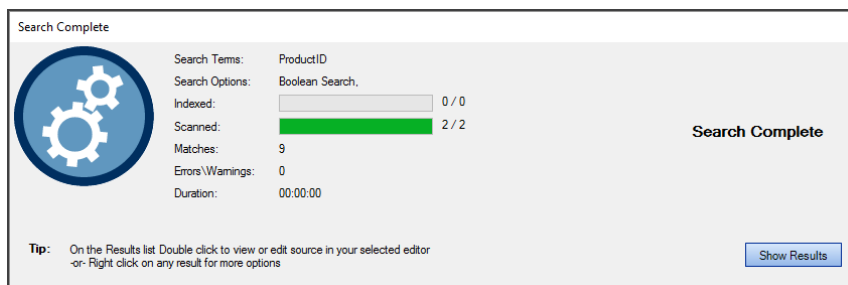
5. Click on the Show Results button. A list of results matching your search criteria will appear in the **Results** frame.
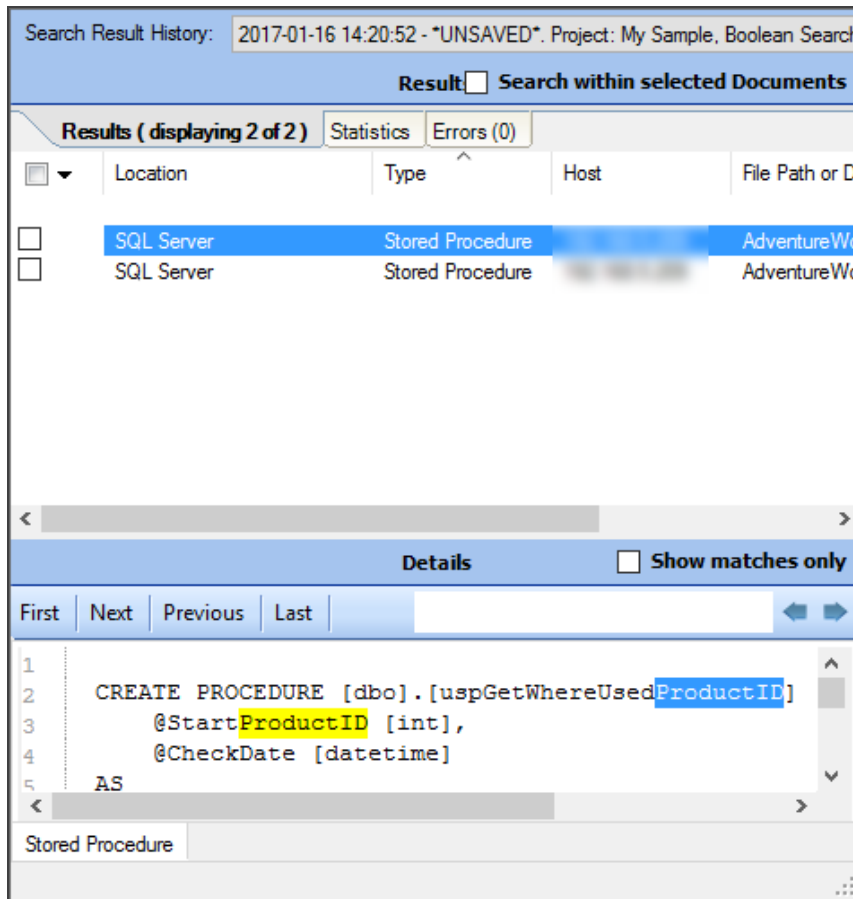
View Result Statistics

In the **Results** window, click on the **Statistics** tab. Use the horizontal scroll bar located at the bottom of the window to view all data columns; Location, Type, Documents, Matches.

View Result Errors

In the **Results** window, click on the **Errors** tab. Use the horizontal scroll bar located at the bottom of the window to view all data columns; Location, Type, Host, File Path or Database, Document.

Click on an individual error item for more details. These errors and warnings often provide instructions to resolve the issues logged.

Add an Errant File to the Project Exclusion List

Note: This option is available only for results sourced from Local or Network Folders.

Purpose: If one or more files come up in the **Results** window **Errors** tab list, and (for example) the file is corrupt, can't be opened, or is on the **Results** list and you know you don't want to include this particular file in future search passes for this project's Local or Network Folders files, you can use this option to add it to the project file exclusion list quickly and easily, as follows:

1. On the **Errors** tab list, locate the file that you want to add to the current project's search exclusion list.

2. Right-click on the file. A context menu will appear.
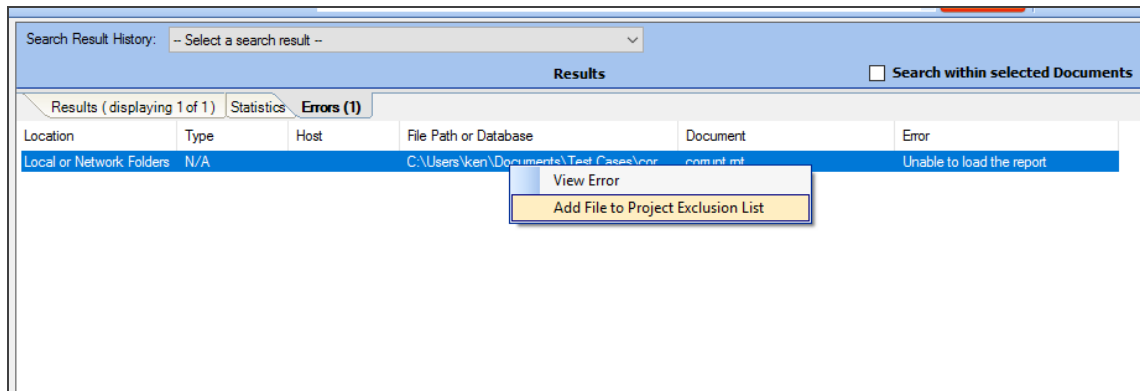
3. From the menu, select *Add File to Poject Exclusion List*. The selected file will be added to the **Exclude File(s) / Folder (s)** list in **Project Settings** for Local or Network Folders.
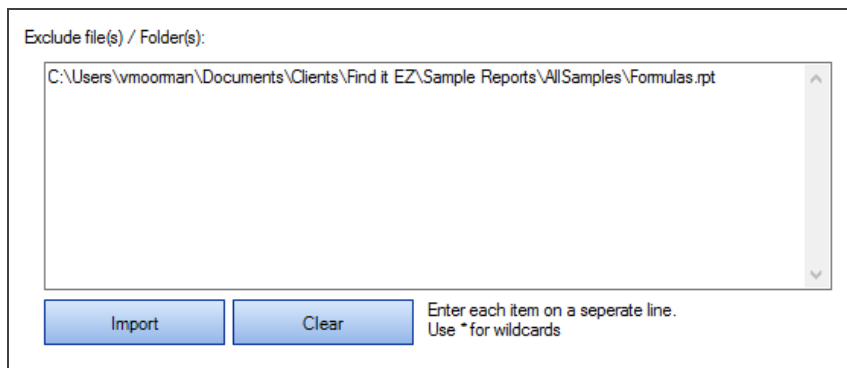
View Search Result Details

1. In the **Results** window, click on the result for which you want to view details. See example below:
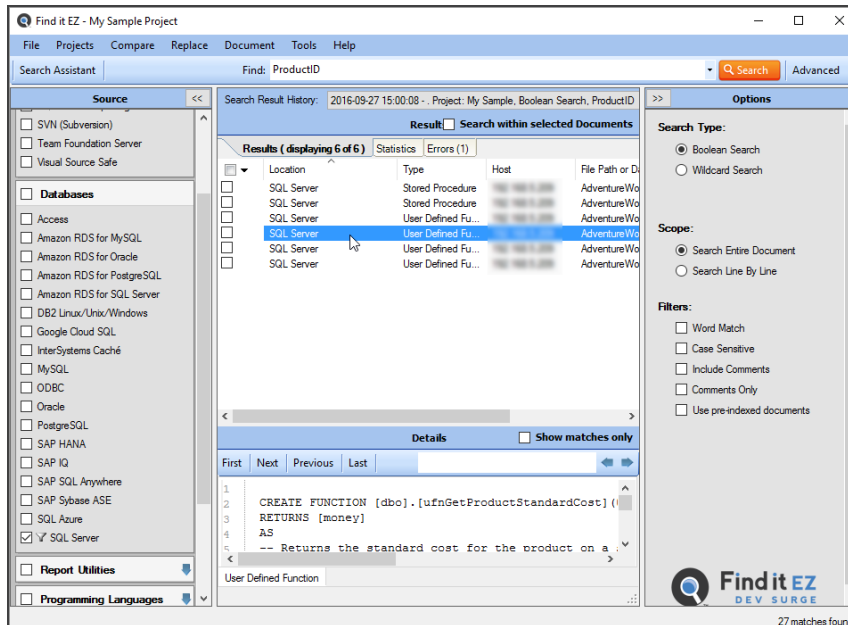
- Details will appear in the **Details** window located below the **Results** window (as above).
- Matches are highlighted in each line where they appear, and lines are numbered.
- To view only those lines with a match, click to check the **Show matches only** check-box. See below.

> Note that the line numbers are hidden when this option is checked.

- To search **Details**, enter your search text into the text box and click on the **First**, **Next**, **Previous**, **Last**, or arrow buttons.
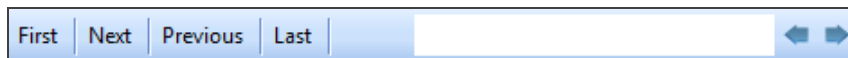
- To open the Find it EZ **Result Viewer**, right-click inside the **Details** panel and select *Open* from the context menu. You can also *Select All* and *Copy* using the same method.
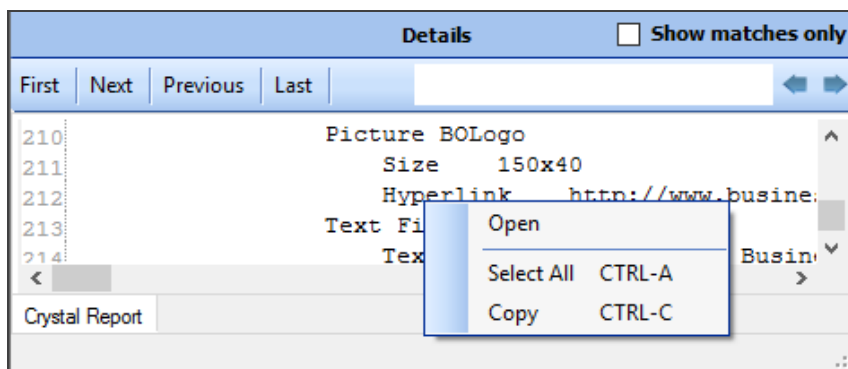
- The **Show matches only** option is auto-synchronized to the **Automatically expand details** user option (see link below). When turned on, you will see the full context of the searched document with line numbers. When turned off, only lines with matches will appear (without line numbers).
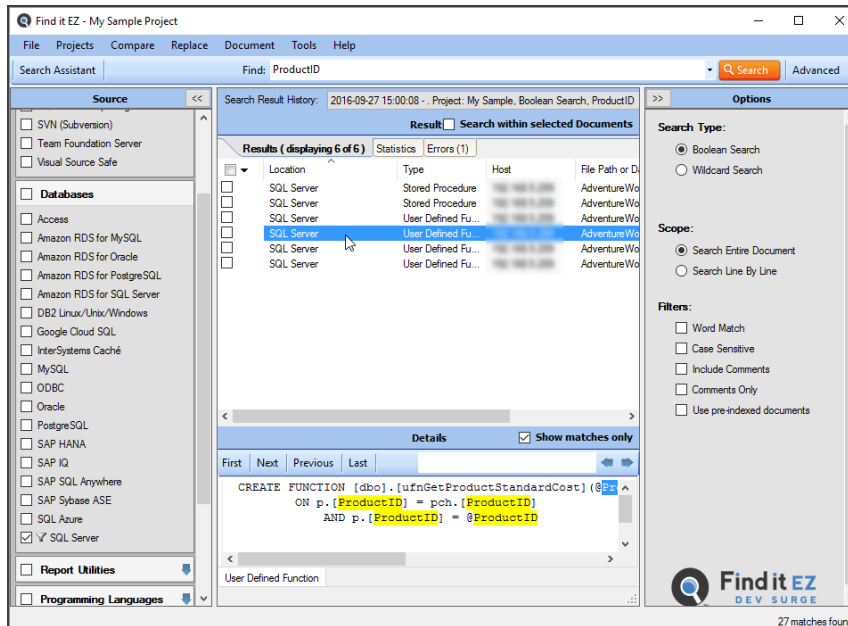
Note: The **Show matches only** option is auto-synchronized to the automatically expand details user option (see link below). When turned on, you will see the full context of the searched document with line numbers. When turned off, only lines with matches will appear (without line numbers).

Copy Detail Item to Clipboard

1. Locate the matching instance line that you want to copy to the clipboard.

2. Right-click on the selected line. A context menu will appear.
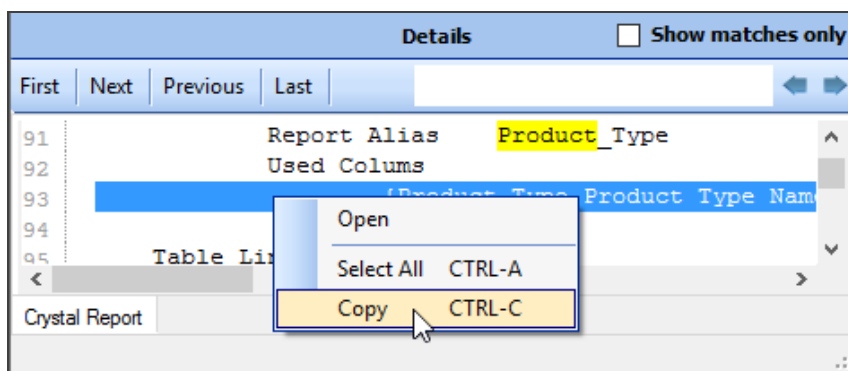
3. From the menu, select **Copy**. The selected line will be copied to the clipboard.

4. Paste the copied text to the desired target location which can be another program or external editor.

Copy Search Results

This section describes the steps required to copy an object name to the clipboard, add an object name to the Boolean search term, or replace the Boolean search term.

Copy Object Name to Clipboard

1. In the **Results** list, locate the file of which you want to copy the object name to the clipboard.

2. Right-click on the file. A context menu will appear.
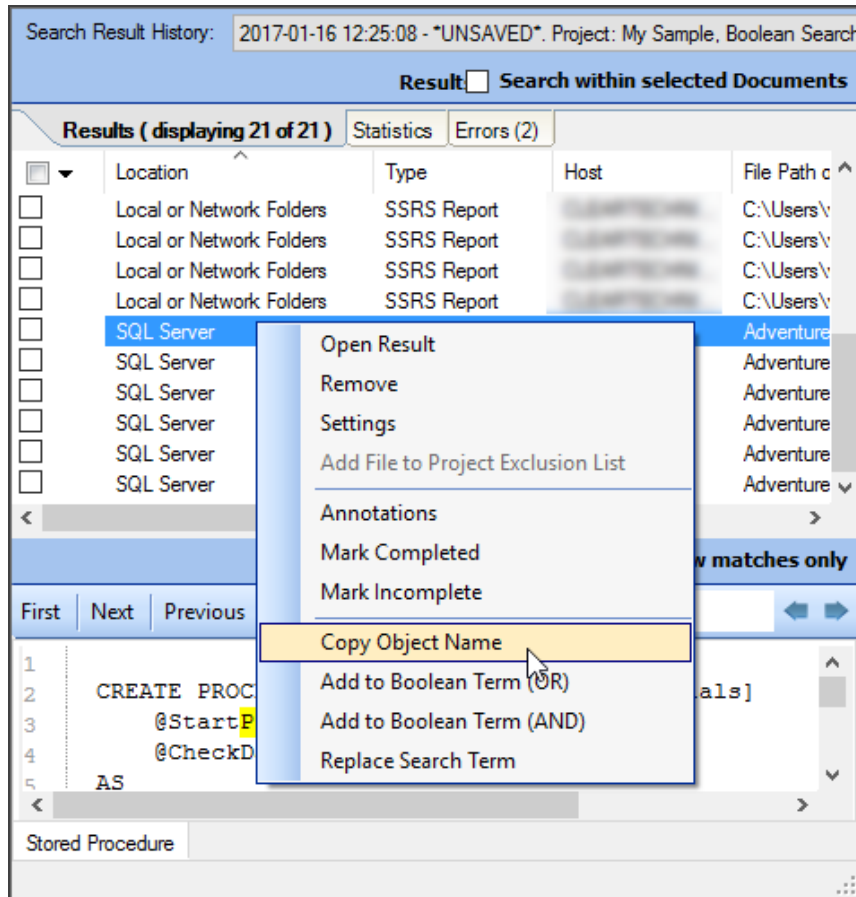
3. From the menu, select **Copy Object Name**. The name of the selected file object will be added to the clipboard.

4. Paste the object name to the desired location.

Add Object Name to Boolean Search Term

1. In the **Results** list, locate the file of which you want to add the object name to the Boolean search term.

2. Right-click on the file. A context menu will appear.
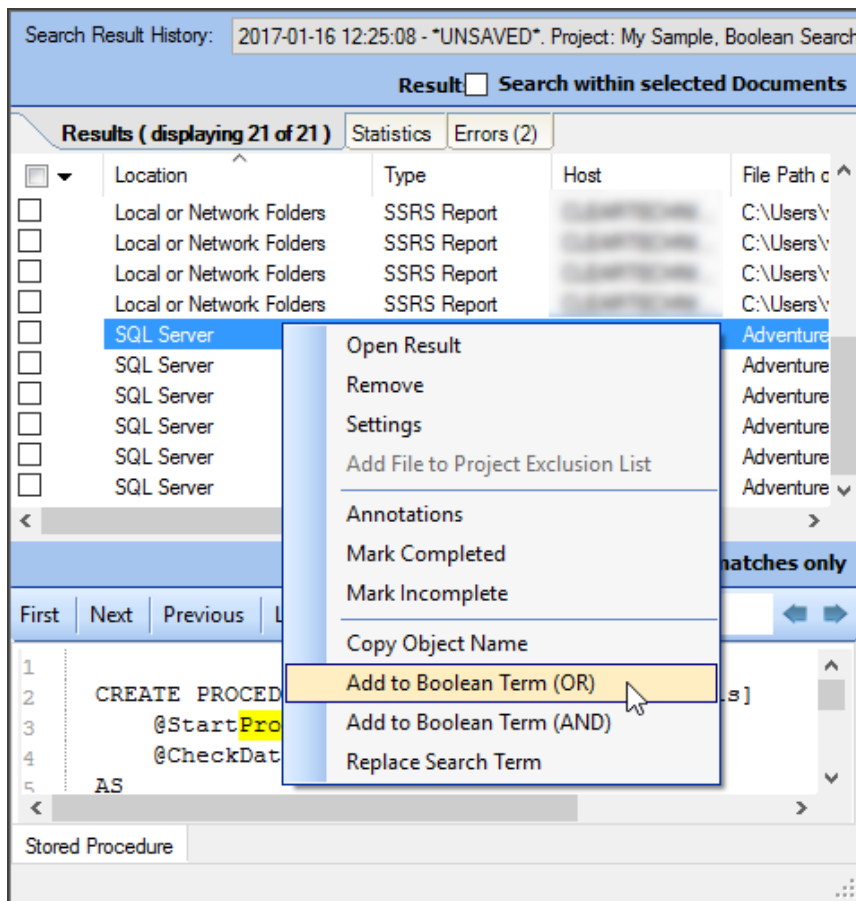
3. From the menu, select **_Add to Boolean Term (OR)_** OR **_Add to Boolean Term (AND)_** , as desired. The name of the selected file object will be appended to any existing search term in the **Find** text box (on the search bar) with the selected boolean expression OR/AND operand. See example below:
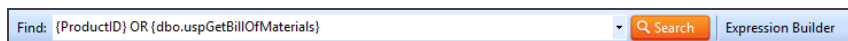
Replace Boolean Search Term

1. In the **Results** list, locate the file having the object name with which you want to replace the Boolean search term.

2. Right-click on the file. A context menu will appear.
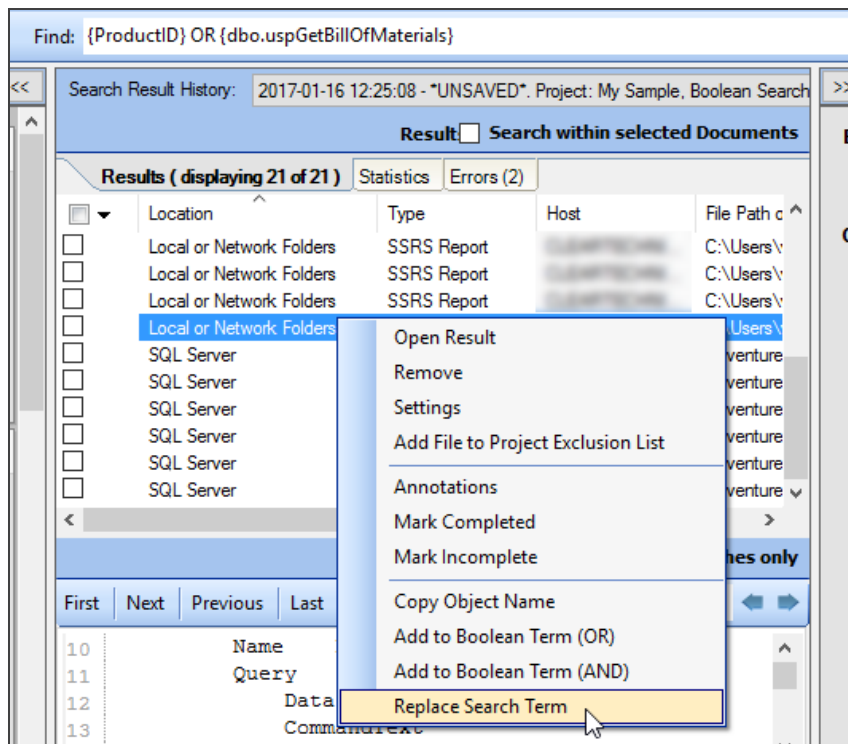
3. From the menu, select *Replace Search Term* . The name of the selected file object will replace any existing search term in the **Find** text box (on the search bar). See example below:

Modify Search Results

This section provides step-by-step instructions to mark search result items complete or incomplete, add or edit result annotations, remove an item(s) from search results, and to add a file to a project's search exclusion list. You may want to break up a list into smaller sub-lists for redistribution, or remove false-positive matches, etc.

Mark Item(s) Complete or Incomplete

1. In the **Results** window, locate the result you want to mark complete or incomplete.

2. Right-click on the result row. A context menu will appear.
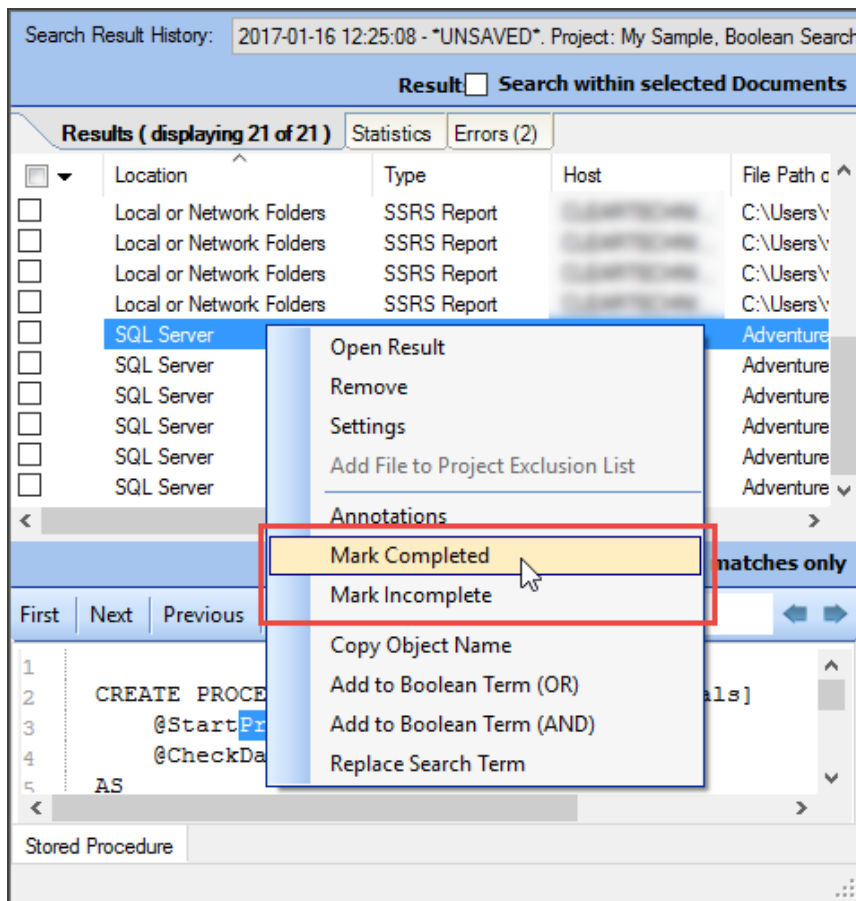
3. Click to select **Mark Completed** or **Mark Incomplete**, as desired.

- If marked complete, a green check-mark will appear preceding the result.

- If a completed result is then marked incomplete, the green check-mark will be removed.
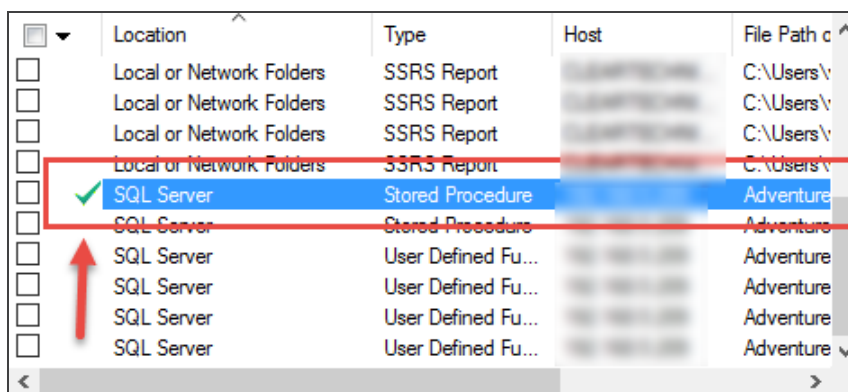
Mark All Complete or Incomplete

1. In the check-box column, click to select the results you want to mark complete or incomplete.
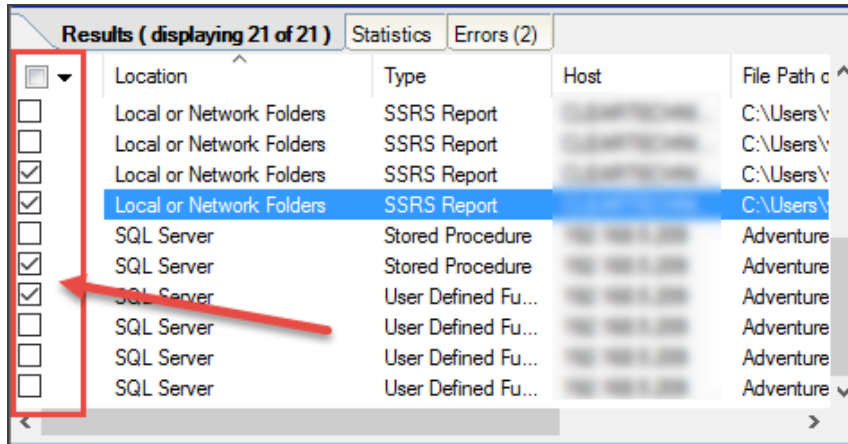
2. In the header of the check-box column, click on the down arrow button. A context menu will appear.
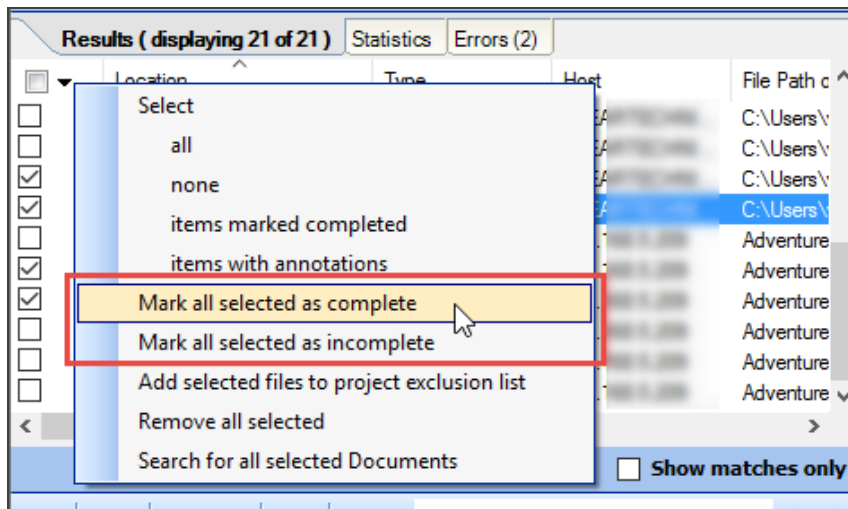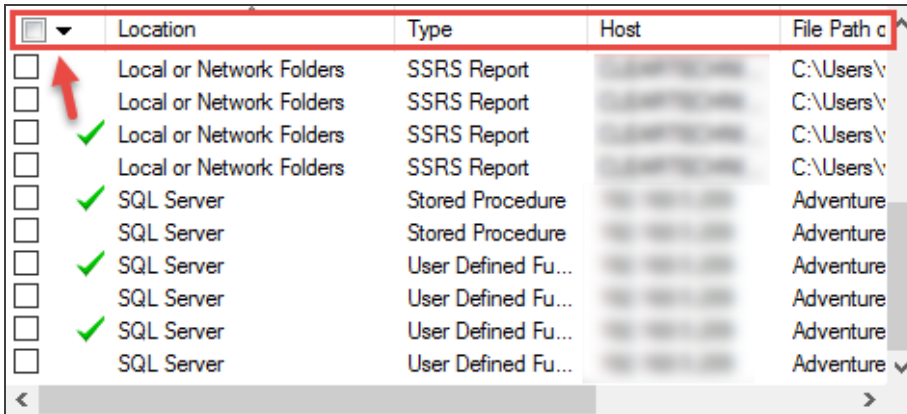
3. To mark the selected results complete, select **Mark all checked as completed** from the menu. A green check mark will appear preceding each selected result.

   OR

4. To mark the selected results incomplete, select **Mark all checked as incomplete** from the menu. Green check marks will be removed preceding each selected result.

> **Note:** If any search results have been marked complete and you attempt the exit/close the program without first saving your results, you will be prompted to save your search results, continue without saving, or keep the program open.

Select All Items Marked Completed

To locate and select all results that have been marked completed:

1. In the header of the check-box column, click on the down arrow button. A context menu will appear.

2. From the menu, choose **_Select -> items marked completed_**. All results previously marked completed will be selected

(checked).

Add or Edit Annotations

This section outlines the procedures required to add, view, edit, or delete an annotation or to locate and select all items with annotations. Annotations are task assignment or instructions to others or reminders to self for action required on a given search result item. These annotations can then be exported directly to MS Project or distributed via search result lists as a column of information that is included.

Add Annotation

1. In the **Results** window, locate the result to which you want to add an annotation.

2. Right-click on the result row. A context menu will appear.

3. From the menu, select **_Annotations_** . An **Add/Edit Annotations** pop-up will appear.

4. Click on the Add New button. A new entry will be added, including the current date, time (in the **Date** field), and username (in the **Entered by** field).

5. In the **Comments** text box, enter the desired annotation.

6. Click on the Save button to save your note and close the **Add/Edit Annotations** pop-up. A clipboard icon will appear in the **Results** window preceding each result with an annotation. See example below:

> **Note:** If any search results have annotations and you attempt the exit/close the program without first saving your results, you will be prompted to save your search results, continue without saving, or keep the program open.

7. To discard any changes, click on the Cancel button.

View Annotations

1. In the **Results** window, locate the result for which you want to view annotations.

   > **Note:** Results with annotations are preceded by a clipboard icon.

2. Right-click on the result row. A context menu will appear.
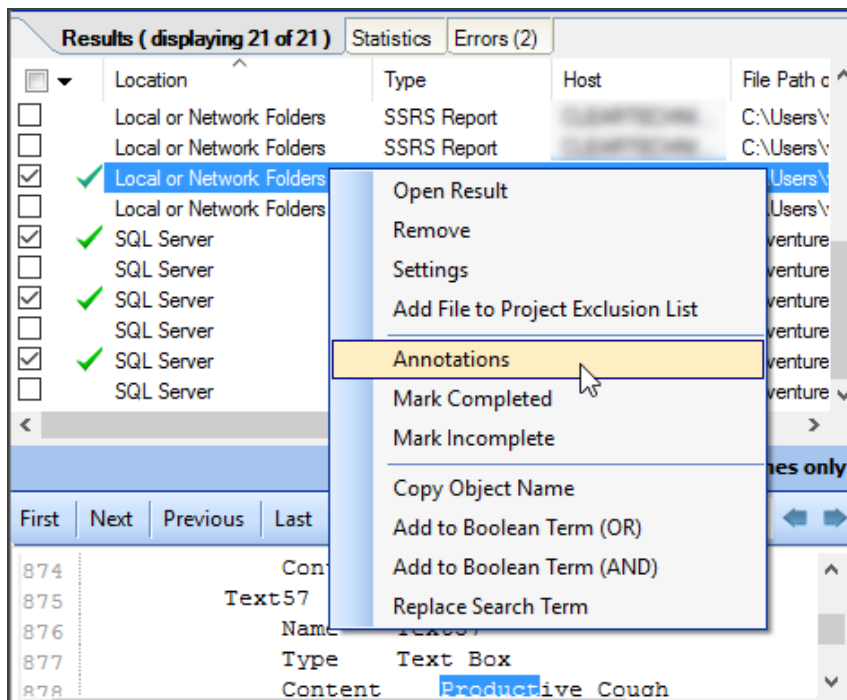
3. From the menu, select *Annotations*. An **Add/Edit Annotations** pop-up will appear. Details for the most recent annotation will be shown by default in the lower section of the pop-up. To view another annotation, click to select the desired row

(e.g. by **Date** or **Entered by**) from the list in the upper section. See example below:

Edit Annotation

1. For the selected annotation, make the desired changes in the **Comments** text box.

2. Click on the Save button to save. A new, dated entry will be generated to include the changes. See example below:

3. To discard your changes, click on the Cancel button.

Delete Annotation

1. In the list of annotations, click to select the entry you want to delete.

2. Click on the Delete button. The selected annotation will be removed from the list. See below:

3. To close the **Add/Edit Annotations** pop-up, click on the X button.

Select All Items with Annotations

1. In the header of the check-box column, click on the down arrow button. A context menu will appear.
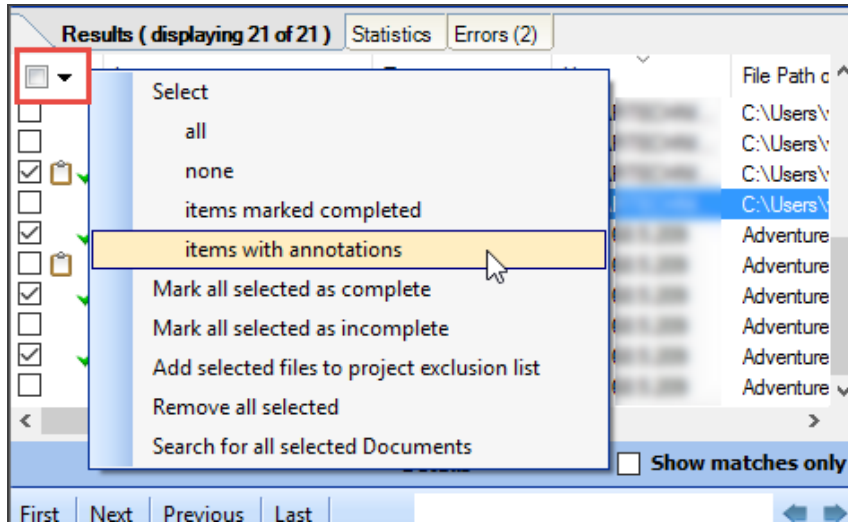
2. From the menu, choose *Select -> items with annotations* . All results with annotations will be selected (checked).

Remove Item from Search Results

1. In the **Results** window, locate the result you want to remove from the list.

2. Right-click on the result row. A context menu will appear.
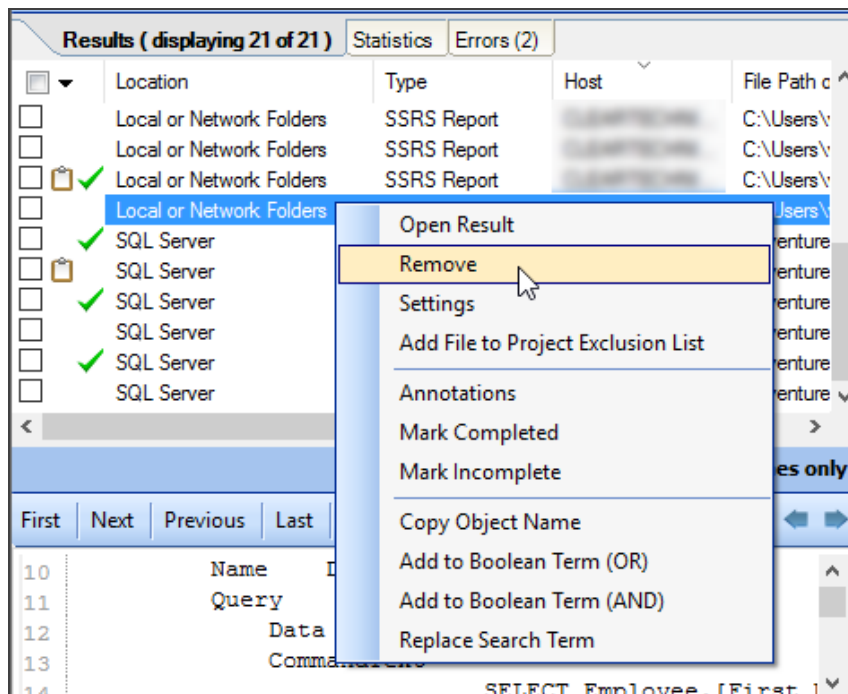
3. From the menu, select *Remove* . An **Are you sure?** confirmation message will appear.
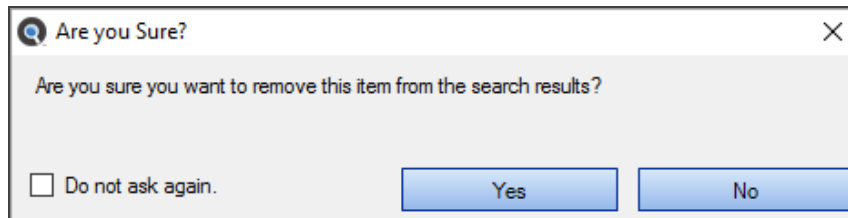
> **Tip:** To prevent this pop-up from appearing the next time you remove a result, click to check the **Do not ask again** check-box.

4. To remove the selected item from the search results, click on the Yes button. See example below:

OR

5. To cancel, click on the No button.

> **Alert:** If you inadvertently delete an item, you can recover by using the "search results history" drop down box to return to the full search list. However, this will reset and roll back all changes since the search was run/loaded.

Remove All Checked Results

1. In the check-box column, click to select (check) the results you want to remove.

2. In the header of the check-box column, click on the down arrow button. A context menu will appear.

3. From the menu, select *Remove all checked* . An **Are you sure?** confirmation message will appear.
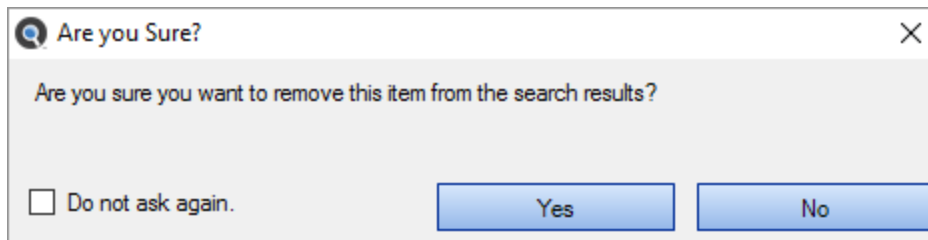
Tip: To prevent this pop-up from appearing the next time you remove a result, click to check the **Do not ask again** check-box.

4. To remove the selected items from the search results, click on the Yes button. See example below:

OR

5. To cancel, click on the No button.

Alert: If you inadvertently delete an item, you can recover by using the "search results history" drop-down box to return to the full search list. However, this will reset and roll back all changes since the search was run/loaded.

Add File(s) to Project Search Exclusion List

Add a Single File to the Project Exclusion List

Note: This option is available only for results sourced from Local or Network Folders.

Purpose: If one or more files come up in the Search **Results** tab list, and (for example) the file is corrupt, can't be opened, or is on the **Results** list and you know you don't want to include this particular file in future search passes for this project, you can use this option to add it to the project file exclusion list quickly and easily, as follows:

1. In the **Results** list, locate the file that you want to add to the current project's search exclusion list.

2. Right-click on the file. A context menu will appear.
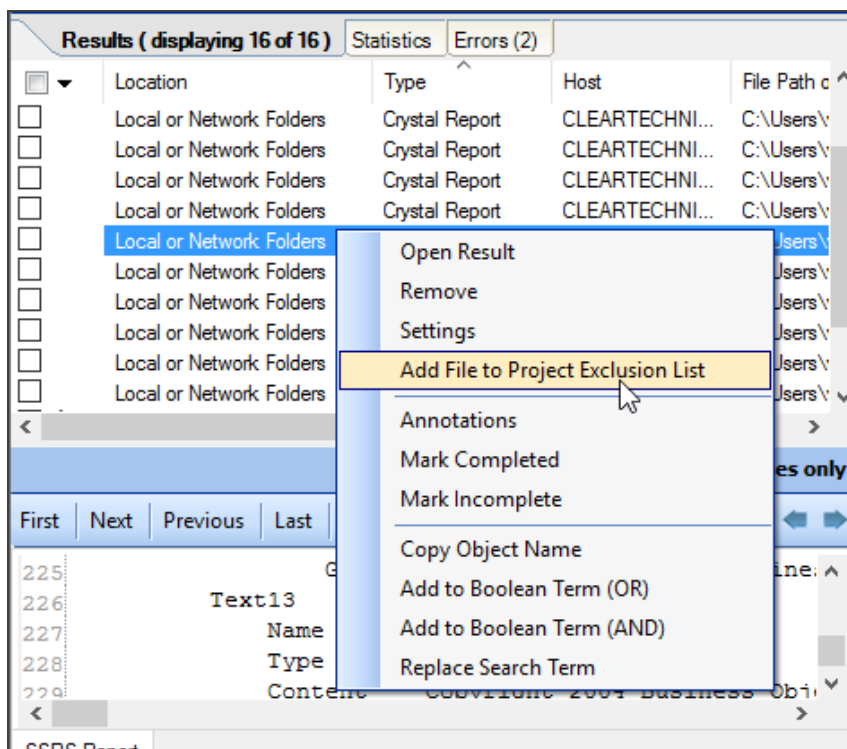
3. From the menu, select *Add file to project exclusion list* . The selected file will be added to the **Exclude File(s) / Folder(s)** list in **Project Settings** for Local or Network Folders.

4. A view request notification will appear, as below:
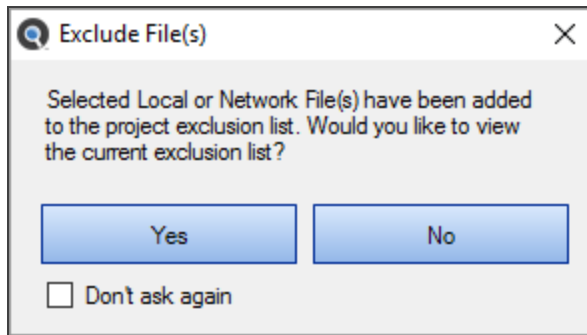
5. To view the current exclusiion list, click on the Yes button. To cancel, click on the No button. See example below:
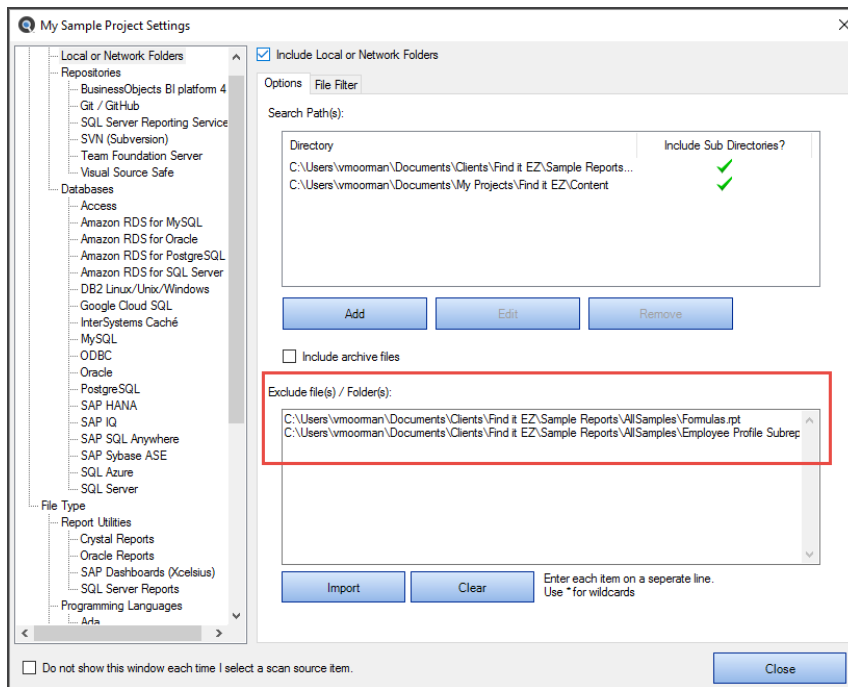
Add Multiple Files to Project Exclusion List

1. In the **Results** list, locate the files that you want to add to the current project's search exclusion list.

2. In the check-box column, click to select (check) the desired results.

3. In the header of the check-box column, click on the down arrow button. A context menu will appear.
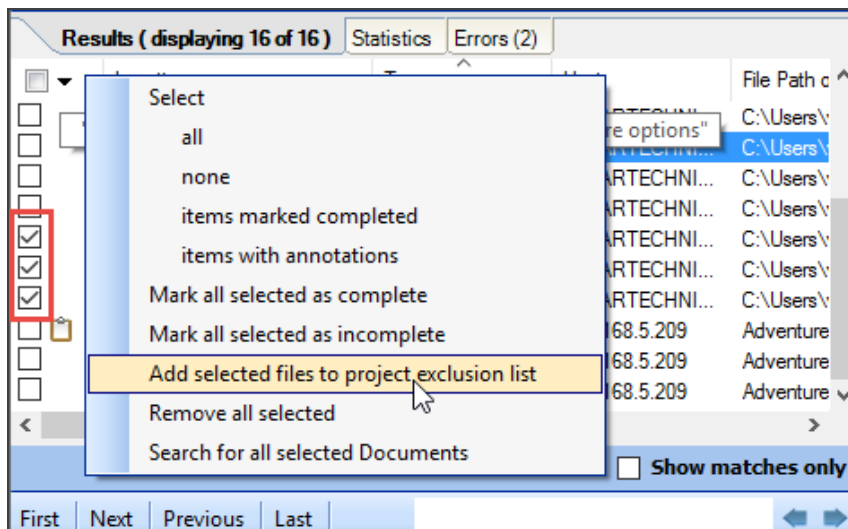
4. From the menu, select *Add selected files to project exclusion list* . The selected files will be added to the **Exclude File(s) / Folder(s)** list in **Project Settings** for Local or Network Folders.

5. A view request notification will appear, as below:
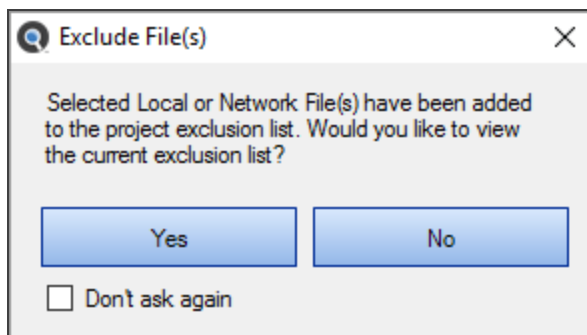
6. To view the current exclusiion list, click on the Yes button (see example below). To cancel, click on the No button.
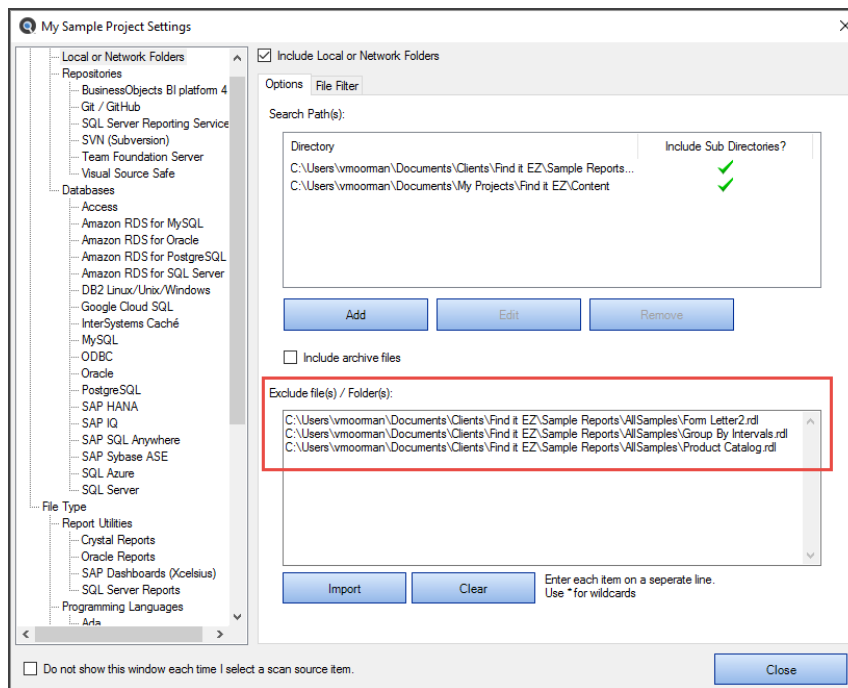
See Also:

- "Save Search Results" on page 31
- "Export Results" on page 34
- "Print Results" on page 41

Example Workflow Scenarios

This section provides a number of example scenarios, procedures, and resulting screen shots for searching and reporting in source file locations, databases, and accessing reporting tools.

Source File Locations

Examples provided in this section include searching local or network folders, searching a GitHub repository, and searching a Team Foundation Server (TFS) repository.

Search Local or Network Folders

1. From the **Source** frame on the left, locate the **File Locations** category.
2. Click to check the **Local or Network Folders** source. The **Project Settings** dialog will appear.
3. Configure settings.
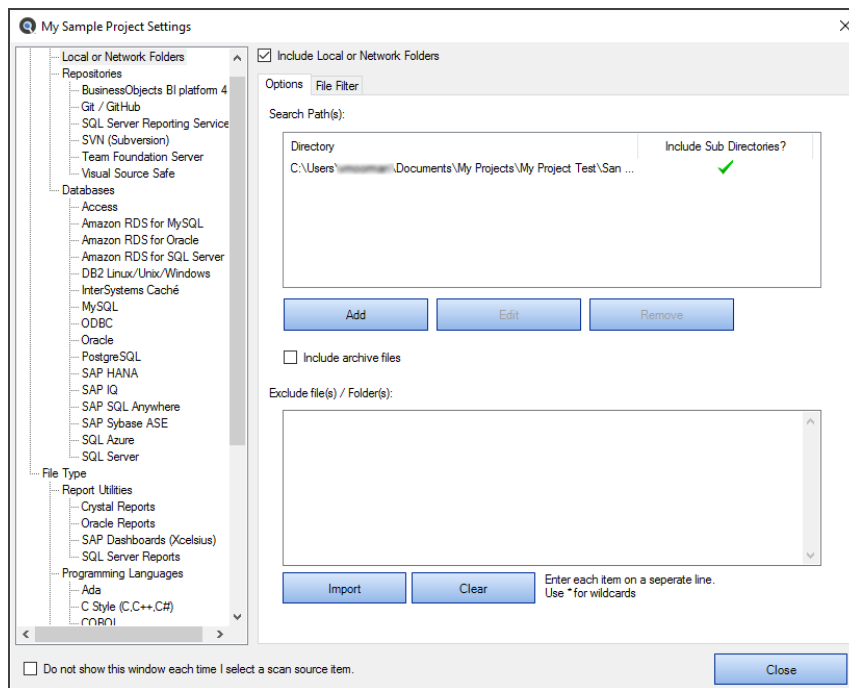
4. From the **Source** frame on the left, click to check one or more supported file type(s). For example, select a file type from the **Documents** category.

5. Configure settings. See example below:

6. From the **Options** frame on the right, select the desired **Content Filters**.

    Note: Default search **Options** are: **Search Type** = Boolean with Wildcards Expressions, **Content Filters** = None. Search options can be set'on program start-up' or changed during 'new project or wizard task' creation to either use the program defaults or to remember your last used settings.

    Tip: For better search performance, click to check the Use pre-indexed documents in **Content Filters**. This will use the last indexed document content and therefore will not refresh content with latest updates. Use this filter if it is known that the source documents are changed infrequently or have not changed since the last Find it EZ project indexing.

7. On the search bar (see image below), enter the desired search text into the **Find** text box.

8. Click on the Search button to initiate the search. A **Searching** dialog box will appear, showing the status of the search.

9. Once complete, the **Search Complete** dialog box will appear.
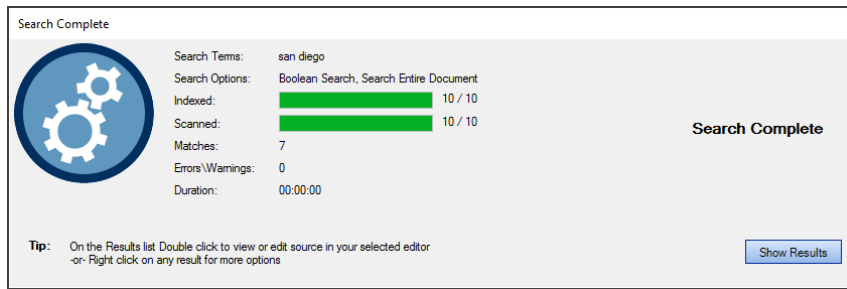
10. Click on the Show Results button. A list of results matching your search criteria will appear in the **Results** frame.
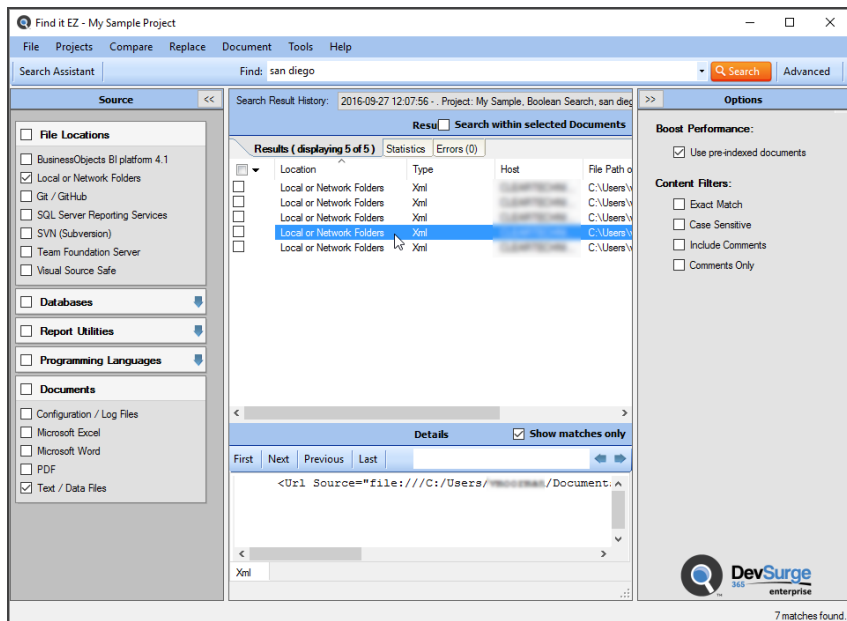
Note: After performing a search, settings can be saved to a Project for later use again.

11. To view details for a result, click on a row in the **Results** window. Details will appear in the **Details** window.

12. To view the source file, right-click on a detail line and select **Open** from the context menu. See example below:
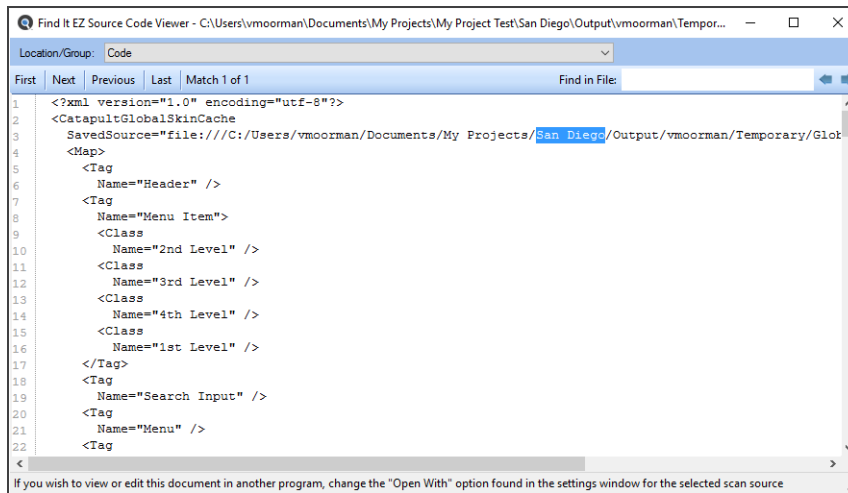
Search a Git / GitHub Repository

1. From the **Source** frame on the left, locate the **File Locations** category.

2. Click to check the **Git / GitHub** source. The **Project Settings** dialog will appear (example to follow).

3. Configure settings. See example below:

4. From the **Source** frame on the left, click to check one or more supported file type(s). In the example below, **C Style (C,C++,C#)** has been selected from the **Programs** category.

5. Configure settings. See example below:

6. From the **Options** frame on the right, select the desired **Content Filters**.

> **Note:** Default search **Options** are: **Search Type** = Boolean with Wildcards Expressions, **Content Filters** = None. Search options can be set'on program start-up' or changed during 'new project or wizard task' creation to either use the program defaults or to remember your last used settings.

> **Tip:** For better search performance, click to check the Use pre-indexed documents in **Content Filters**. This will use the last indexed document content and therefore will not refresh content with latest updates. Use this filter if it is known that the source documents are changed infrequently or have not changed since the last Find it EZ project indexing.

7. On the search bar (see image below), enter the desired search text into the **Find** text box.

8. Click on the Search button to initiate the search. A **Searching** dialog box will appear, showing the status of the search. See example below:

9. Once complete, the **Search Complete** dialog box will appear.

10. Click on the Show Results button. A list of results matching your search criteria will appear in the **Results** frame. See example below:

Note: After performing a search, settings can be saved to a Project for later use again.

11. To view details for a result, click on a row in the **Results** window. Details will appear in the **Details** window (as above).

12. To view the source file, right-click on a detail line and select *Open* from the context menu. See example below:

Search a Team Foundation Server (TFS) Repository

1. From the **Source** frame on the left, locate the **File Locations** category.

2. Click to check the **Team Foundation Server** source. The **Project Settings** dialog will appear.

3. Configure settings. See example below:

4. From the **Source** frame on the left, click to check one or more supported file type(s). In the example below, **C Style (C,C++,C#)** has been selected from the **Programs** category.

5. Configure settings. See example below:

6. From the **Options** frame on the right, select the desired **Content Filters**.

> **Note:** Default search **Options** are: **Search Type** = Boolean with Wildcards Expressions, **Content Filters** = None. Search options can be set'on program start-up' or changed during 'new project or wizard task' creation to either use the program defaults or to remember your last used settings.

> **Tip:** For better search performance, click to check the Use pre-indexed documents in **Content Filters**. This will use the last indexed document content and therefore will not refresh content with latest updates. Use this filter if it is known that the source documents are changed infrequently or have not changed since the last Find it EZ project indexing.

7. On the search bar (see image below), enter the desired search text into the **Find** text box.

8. Click on the Search button to initiate the search. A **Searching** dialog box will appear, showing the status of the search. See example below:

9. Once complete, the **Search Complete** dialog box will appear.

10. Click on the Show Results button. A list of results matching your search criteria will appear in the **Results** frame. See example below:

Note: After performing a search, settings can be saved to a Project for later use again.

11. To view details for a result, click on a row in the **Results** window. Details will appear in the **Details** window (as above).

12. To view the source file, right-click on a detail line and select *Open* from the context menu. See example below:

<comment>Source Code Viewer screenshot showing code</comment>

```
Find It EZ Source Code Viewer - [$/]:SharpCvsLib\SharpCvsLibCode\Requests\PServerAuthRequest.cs    —  □  ✕

Location/Group:  Code

First | Next | Previous | Last | Match 4 of 9                              Find in File:

116    /// </summary>
117    /// <param name="cvsroot">A cvsroot line that locates the repository and
118    ///     the server.</param>
119    /// <param name="username">The name of the user that is logging in.</param>
120    public PServerAuthRequest (string cvsroot, string username) : this (cvsroot, username, null) {
121    }
122
123    /// <summary>
124    /// Create a new pserver authentication object.  Populate the cvsroot, username
125    ///     and password variables that will be sent to the server.  When the password
126    ///     is populated it is encrypted with the password scrambler.
127    /// </summary>
128    /// <param name="cvsroot">A cvsroot line that locates the repository and
129    ///     the server.</param>
130    /// <param name="userName">The name of the user that is logging in.</param>
131    /// <param name="password">A password for the user.</param>
132    public PServerAuthRequest(string cvsroot, string userName, string password)
133    {
134        this.cvsroot  = cvsroot;
135        this.userName = userName;
136        this.password = password;
137        this.password = PasswordScrambler.Scramble(this.password);
```

If you wish to view or edit this document in another program, change the "Open With" option found in the settings window for the selected scan source

See Also:

- "Search Wizard" on page 73
- "Apply File Filter" on page 140
- "Configure Source Location(s)" on page 109
- "Local or Network Folders" on page 131
- "Repositories" on page 143
- "File Type" on page 161

Database Examples

Search an Oracle Database

1. From the **Source** frame on the left, locate the **File Locations** category.

2. Click to check the desired file location. The **Project Settings** dialog will appear.

3. Configure settings. See Local or Network Folders example below:
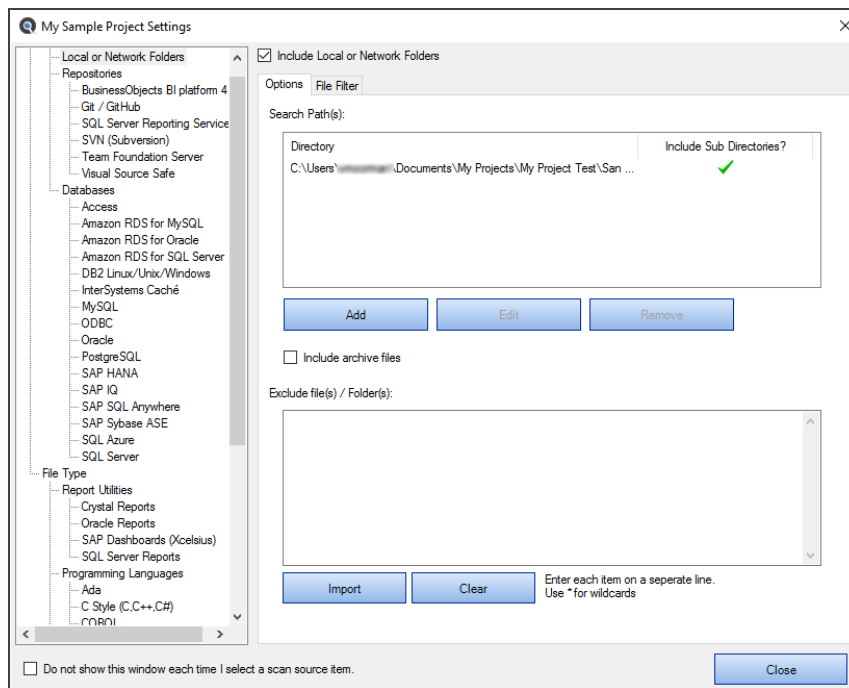
4. From the **Source** frame on the left, click to check **Oracle** in the **Databases** category.
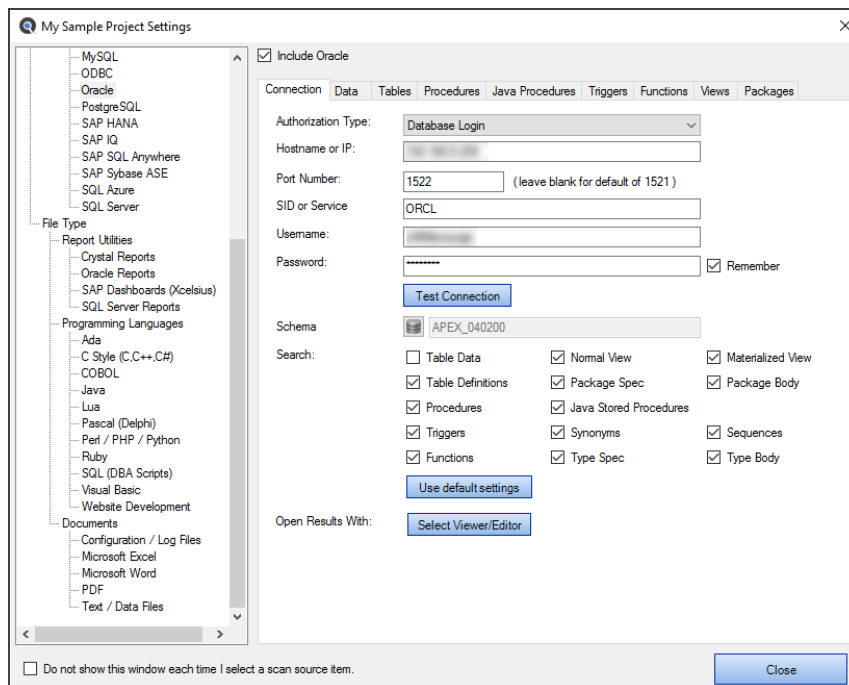
5. Configure settings. See example below:

6. From the **Options** frame on the right, choose the desired **Search Type** and **Content Filters**.

> **Note:** Default search **Options** are: **Search Type** = Boolean Search, **Content Filters** = None. Search options can be set 'on program start-up' or changed during 'new project' or 'new wizard task' configuration to use this default or to remember your last used settings.

7. On the search bar (see image below), enter the desired search text into the **Find** text box.

8. Click on the Search button to initiate the search. A **Searching** dialog box will appear, showing the status of the search. See example below:

9. Once complete, the **Search Complete** dialog box will appear.

10. Click on the Show Results button. A list of results matching your search criteria will appear in the **Results** frame. See example below:

Note: After performing a search, settings can be saved to a Project for later use again.

11. To view details for a result, click on a row in the **Results** window. Details will appear in the **Details** window. See example above.

12. To view the source file, right-click on a detail line and select *Open* from the context menu. See example below:

Search a SQL Server Database

1. From the **Source** frame on the left, locate the **File Locations** category.
2. Click to check the desired file location. The **Project Settings** dialog will appear.
3. Configure settings. See Local or Network Folders example below:
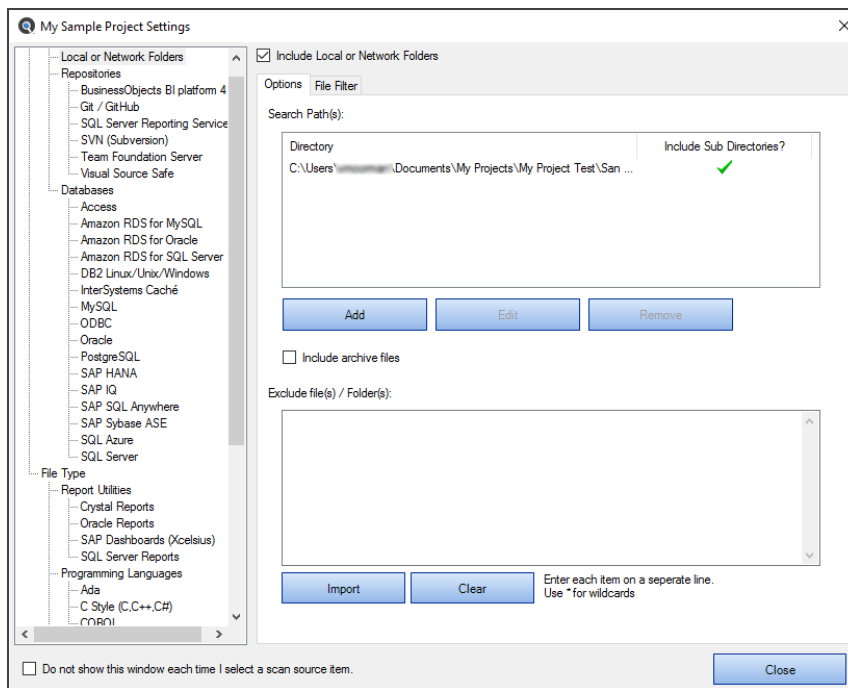
4. From the **Source** frame on the left, click to check **SQL Server** in the **Databases** category.
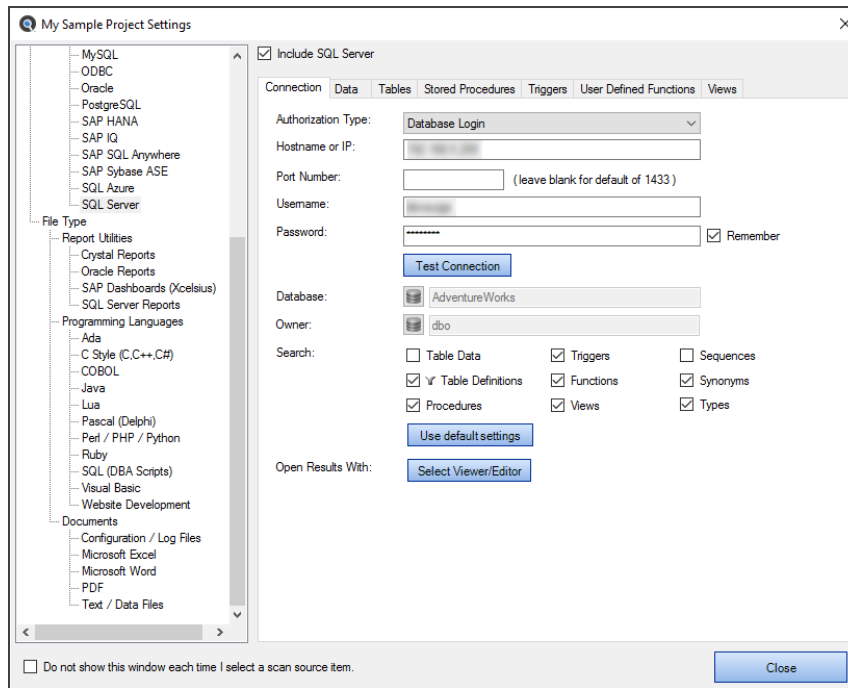
5. Configure settings. See example below:

6. From the **Options** frame on the right, choose the desired **Search Type** and **Content Filters**.

    Note: Default search **Options** are: **Search Type** = Boolean Search, **Content Filters** = None. Search options can be set 'on program start-up' or changed during 'new project' or 'new wizard task' configuration to use these defaults or to remember your last used settings.

    Tip: For better search performance, click to check the Use pre-indexed documents in **Content Filters**. This will use the last indexed document content and therefore will not refresh content with latest updates. Use this filter if it is known that the source documents are changed infrequently or have not changed since the last Find it EZ project indexing.

7. On the search bar (see image below), enter the desired search text into the **Find** text box.

8. Click on the Search button to initiate the search. A **Searching** dialog box will appear, showing the status of the search. See example below:

9. Once complete, the **Search Complete** dialog box will appear.

10. Click on the Show Results button. A list of results matching your search criteria will appear in the **Results** frame. See example below:

> **Note:** After performing a search, settings can be saved to a Project for later use again.

11. To view details for a result, click on a row in the **Results** window. Details will appear in the **Details** window. See example above.

12. To view the source file, right-click on a detail line and select *Open* from the context menu. See example below:

See Also:

- "Databases" on page 150
- "Apply Database Item Filters" on page 156
- "Test Database Connection" on page 153

Reporting Tools

Examples in this section include creating a SQL statements detail extract and creating a database cross-reference list.

Create a SQL Statements Detail Extract

1. Launch the Export Wizard for SQL Code Extract:

    a. Using the Search Wizard:

        i. At the top, left of the main window, click on the Search Wizard button. The **Search Wizard** dialog will appear.
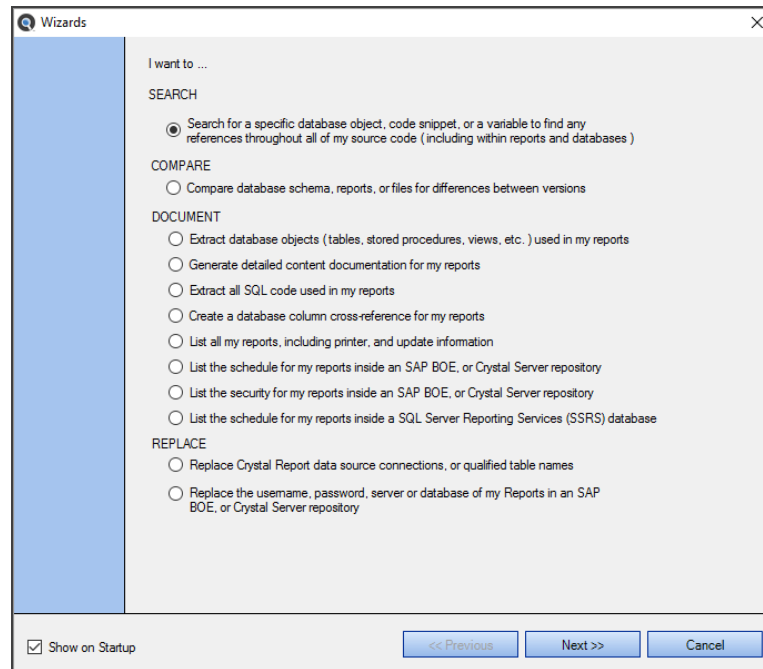
        ii. Click to choose the **Extract database objects (tables, stored procedures, views, etc.) used in my reports** option. The **Export Wizard** will appear.

    b. Using the menu:

        i. From the Find it EZ menu, select *Document -> Business Intelligence -> SQL Code Extract* . The **Export Wizard** will appear. See below:
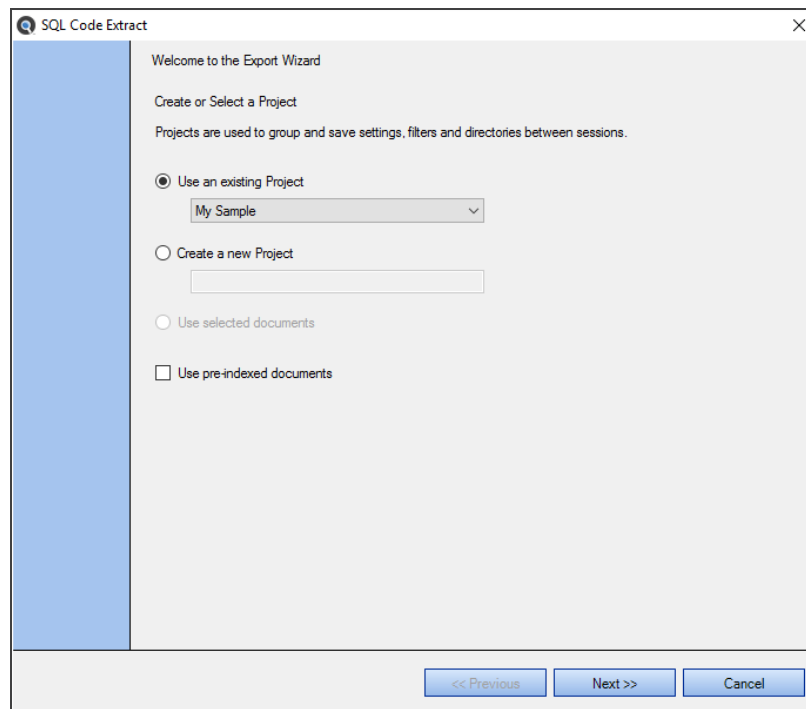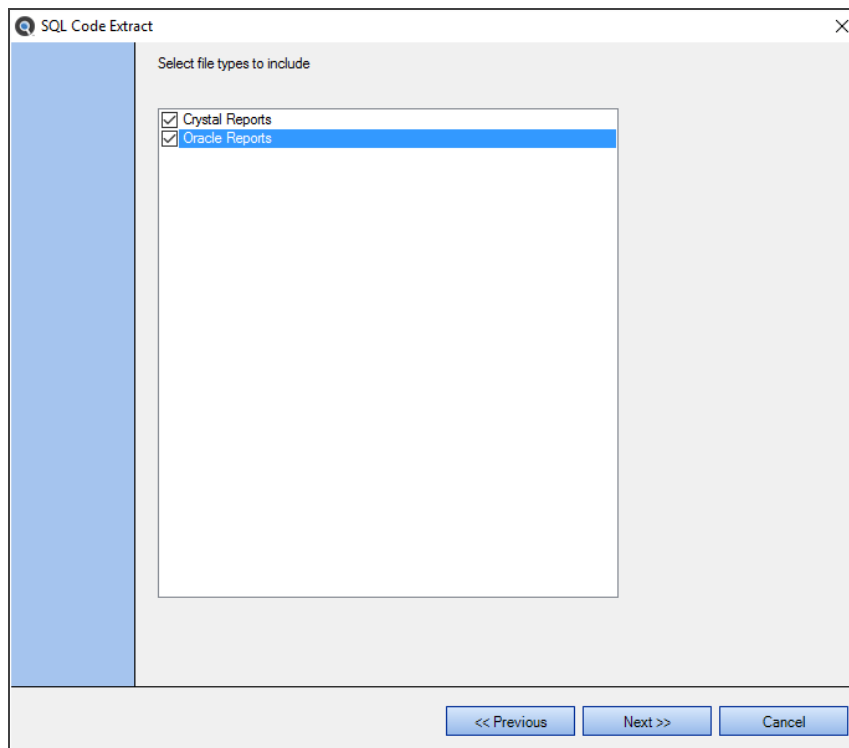
2. Click on the Next >> button to continue.

3. Click to select the file types to include.

4. Click on the Next >> button to continue.
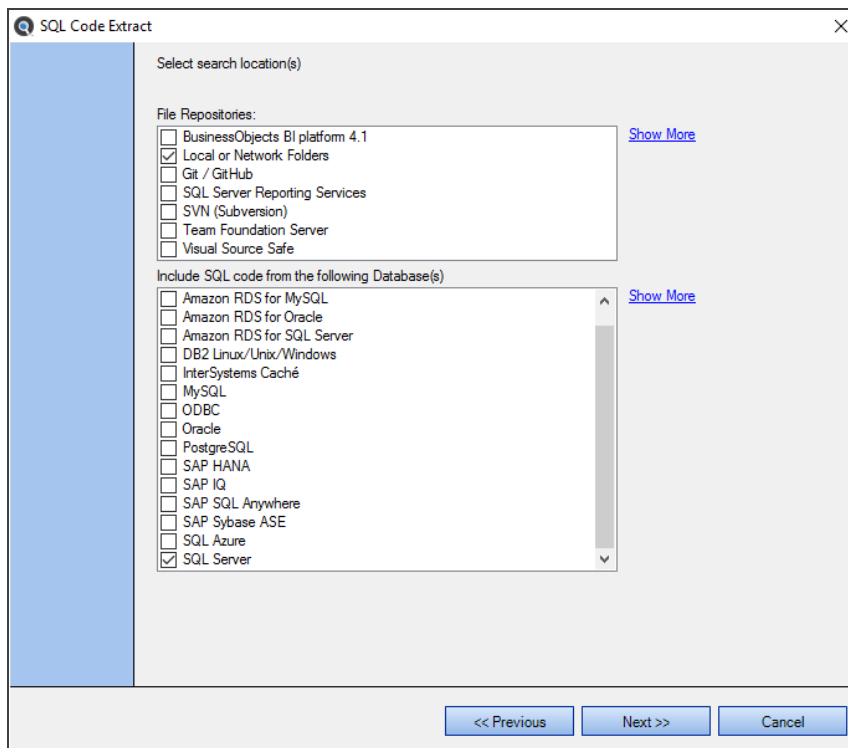
5. Click to select the desired file locations.

6. Click on the Next >> button to continue.
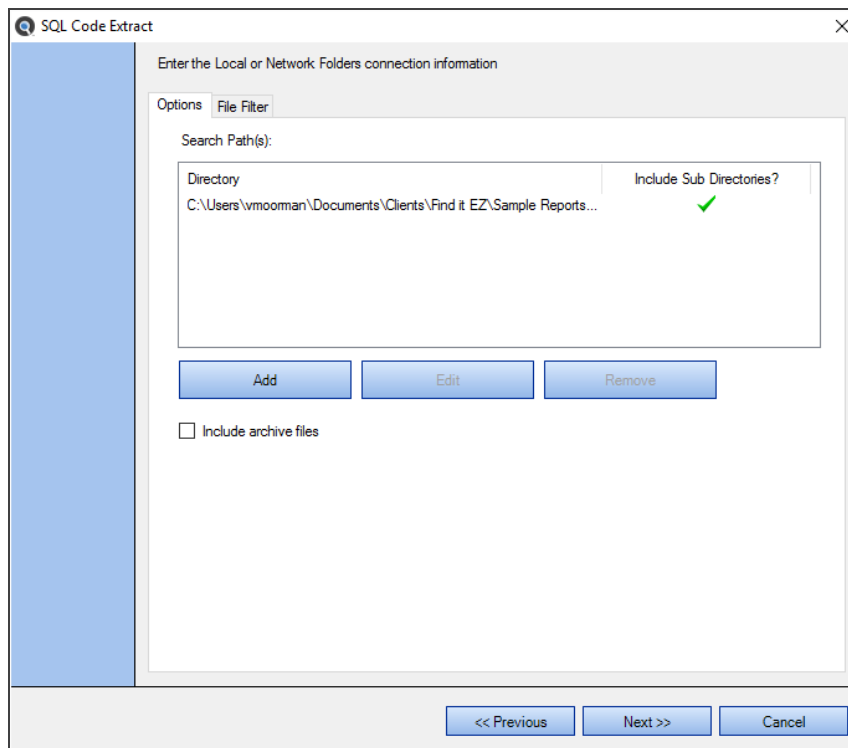
7. Enter the file location connection information.

8. Click on the Next >> button to continue. The **Project Settings** dialog will appear.

9. Enter connection settings for the selected source.

10. Click on the Next >> button to continue.
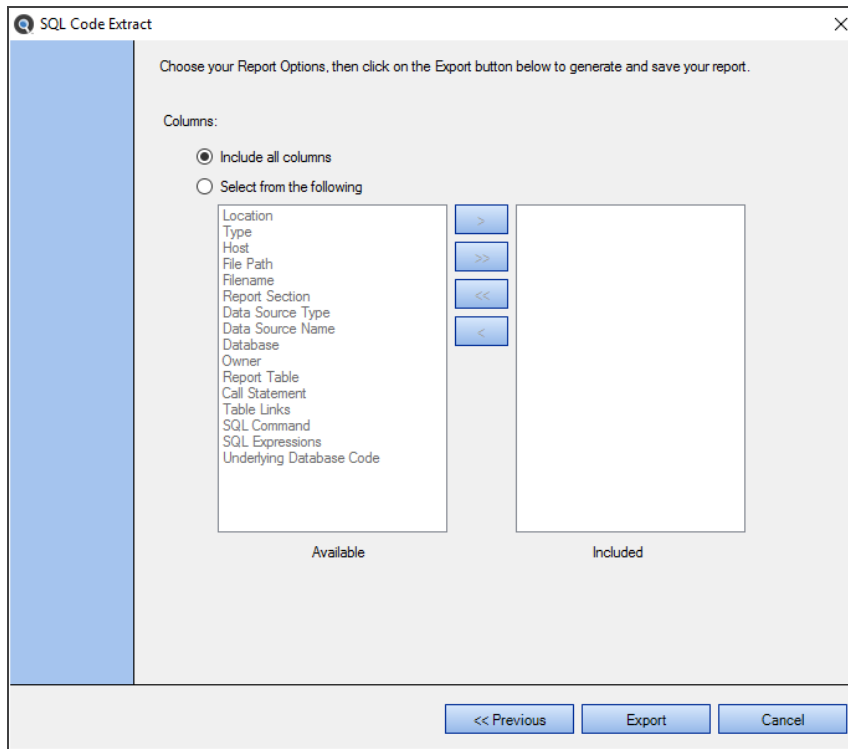
11. Choose report options.

12. Click on the Export button. Find it EZ will begin gathering the required data.
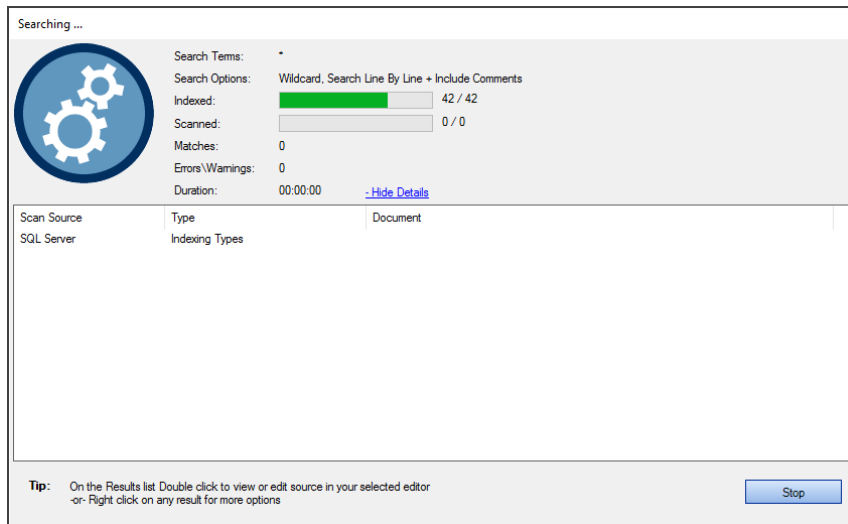
13. Once complete, a **Save As** dialog will appear. See example below:
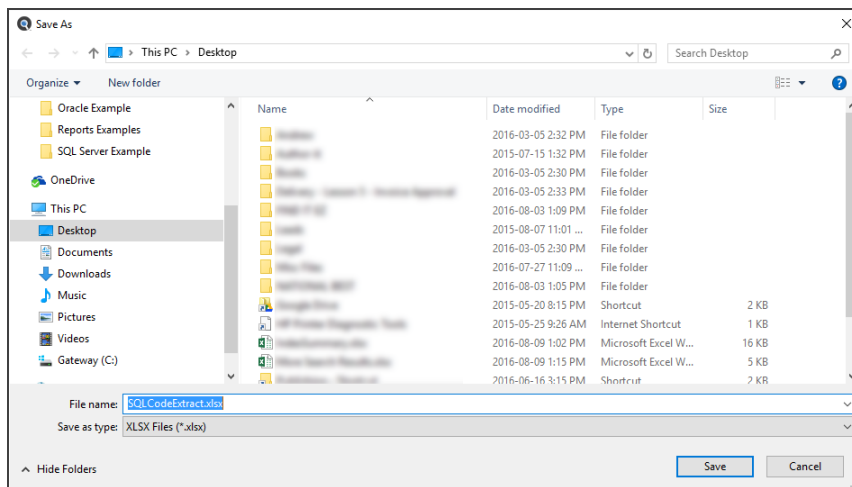
14. Save the report:

   a. Modify the **File name** as desired.

   b. Navigate to the desired folder location.

   c. Click on the Save button.

   A **Save Complete** notiification will appear, as below:

15. To view the saved report, click on the View Now button. The file will open in the specified viewer/editor. See example below:

Report data will include the following:
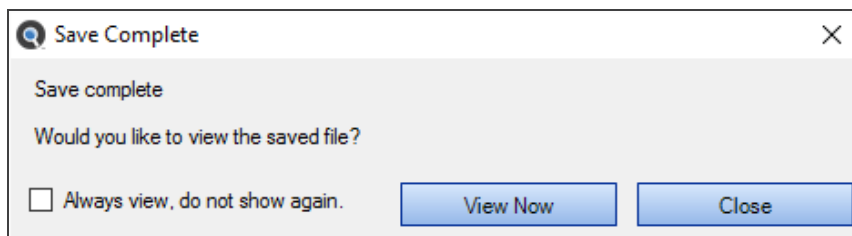
- Location

- Type

- Host

- File Path

- Filename

- Report Section

- Data Source Type

- Data Source Name

- Database

- Owner

- Report Table

- Call Statement

- Table Links

- SQL Command

- SQL Expressions

- Underlying Database Code

Create a Database Cross-Reference List

1. Launch the Export Wizard for Database Cross-Reference:

    a. Using the Search Wizard:

        i. At the top, left of the main window, click on the Search Wizard button. The **Search Wizard** dialog will appear.

© 1998 - 2019 Find it EZ Software Corp.
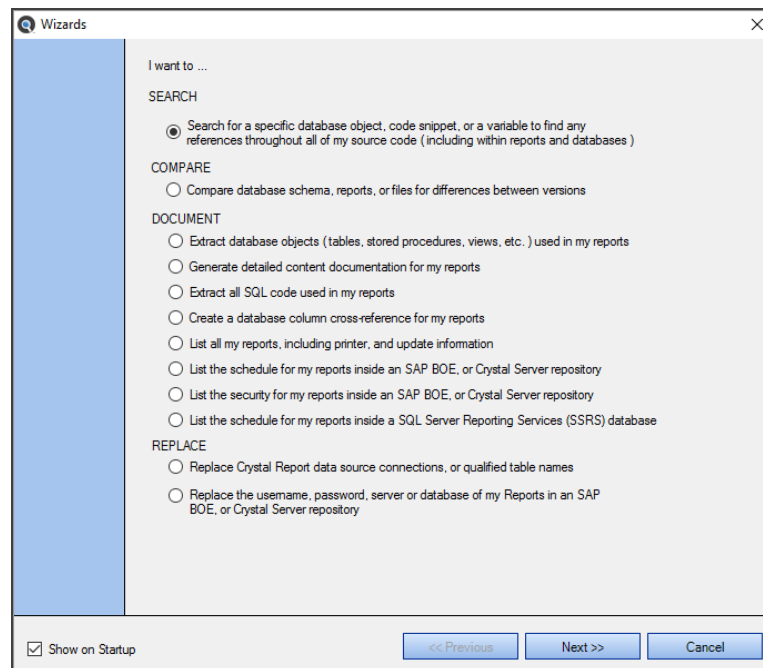
ii. Click to choose the **Create a database cross-reference for my reports** option. The **Export Wizard** will appear.

b. Using the menu:

i. From the Find it EZ menu, select *Document -> Business Intelligence -> Database Cross-Reference* . The **Export Wizard** will appear. See below:

2. Click on the Next >> button to continue.

3. Click to select the file types to include.

4. Click on the Next >> button to continue.

5. Click to select the desired file locations.

6. Click on the Next >> button to continue.

7. Enter the file location connection information.

8. Click on the Next >> button to continue.

9. Choose report options.

10. Click on the Export button. Find it EZ will begin gathering the required data.
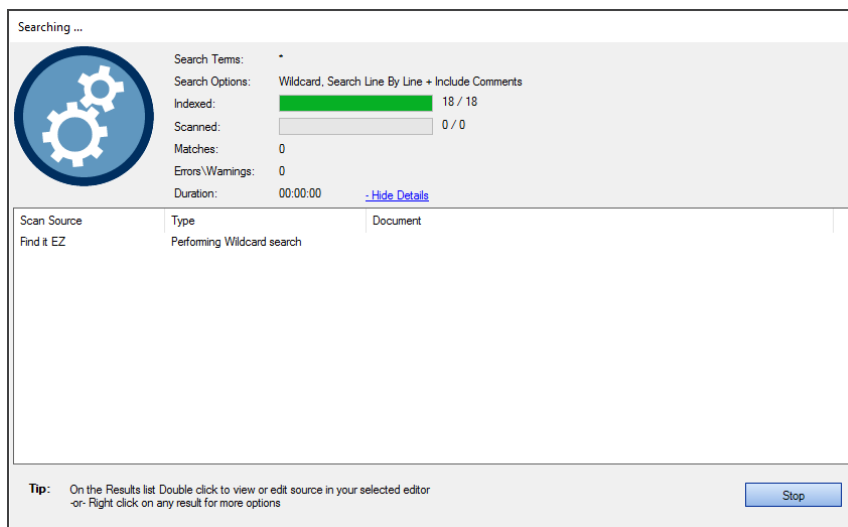
11. Once complete, a **Save As** dialog will appear. See example below:
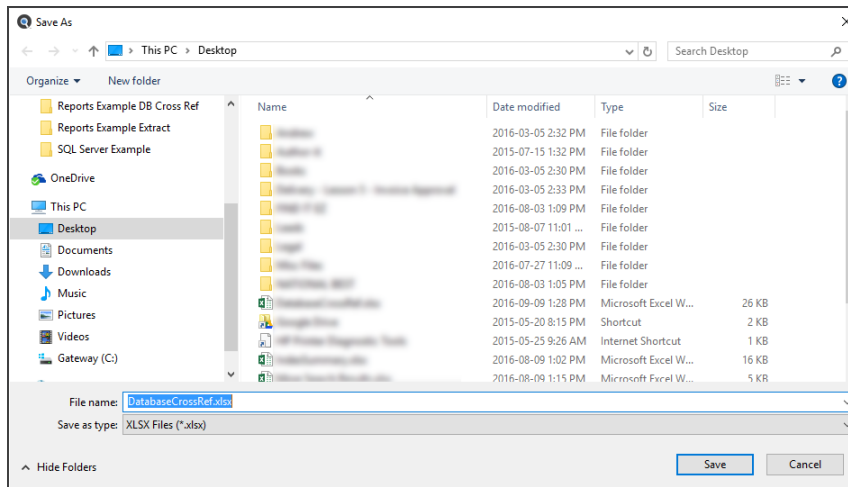
12. Save the report:

    a. Modify the **File name** as desired.

    b. Navigate to the desired folder location.

    c. Click on the Save button.

    A **Save Complete** notiification will appear, as below:
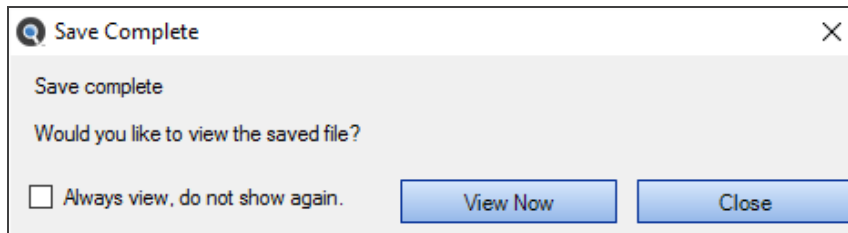
13. To view the saved report, click on the View Now button. The file will open in the specified viewer/editor. See example below:
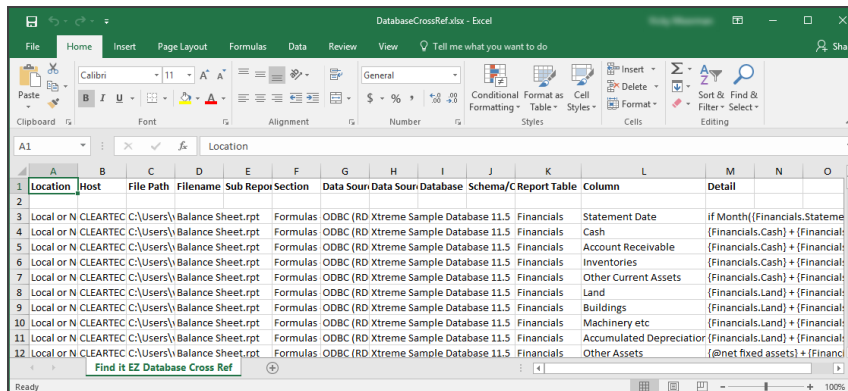
Report data will include the following:

- Location
- Host
- File Path
- Filename
- Sub Report
- Section
- Data Source Type
- Data Source Name
- Database
- Schema/Owner
- Report Table
- Column
- Detail

> **See Also:**
>

Built-in Reports and Documentation

This section describes the steps required to access various Find it EZ reports included with the system.

For example, if you wanted to analyze a large number of historic version reports in preparation for a possible upgrade to find which ones use non-ansi outer join syntax in the queries, you could do the following:

Many Find it EZ reports will give you precisely what you are looking for. One is the "Show SQL Queries" report. This report extracts any joins used by the visual linking expert within the CR designer and recreates the SQL code based on the join property options used by the visual linking tool. There is also the "Report Definition" and "SQL Code Extract" which actually has a column or section showing the type of join used when applicable via the visual linking expert. These reports are available under the **Reports -> Business Intelligence** menu.

> Note: Our trial mode has the number of documents searched and output limited. However, a fully unlocked version is not limited. This may affect your evaluation results if the limits are hit prior to processing a file that contains visual linking.

Business Intelligence Reports

BI Reports can be generated and accessed as follows:

From the menu, select `Document -> Business Intelligence -> [desired report]`. See below.

The following business intelligence reports are available:

- SQL Code Extract
- Reports Definition
- Show SQL Queries
- Database Cross-Reference
- Report Listing

SAP BOE Crystal Server

SAP BOE / Crystal Server reports can be generated and accessed as follows:

From the menu, select `Document -> SAP BOE / Crystal Server-> [desired report]`. See below.

The following SAP BOE / Crystal Server reports are available:

- Report Schedules
- Security Listing

Migrating SAP BOE Reports Example

The following example demonstrates how to upgrade a set of Crystal Reports between SAP BOE Server versions. The oldest Crystal Server supported by the vendor supplied XI 3.1 connector is CRS 2008. Adding support for versions earlier then that requires older SDKs no longer supported or available from SAP.

There is a simplified procedure. Provided you do not need to convert and continue to use the reports within your existing Crystal XI (11) server, here is what you can do:

1. Download the RPT files from your CR XI server, saving the files locally. Unfortunately, it does not look like there is a mass download function built into the Crystal Server CMS.

2. Start Find it EZ Dev Surge 365. Change the "repository" within Find it EZ:

   a. From the menu, select `Tools -> Customize -> File Locations`.
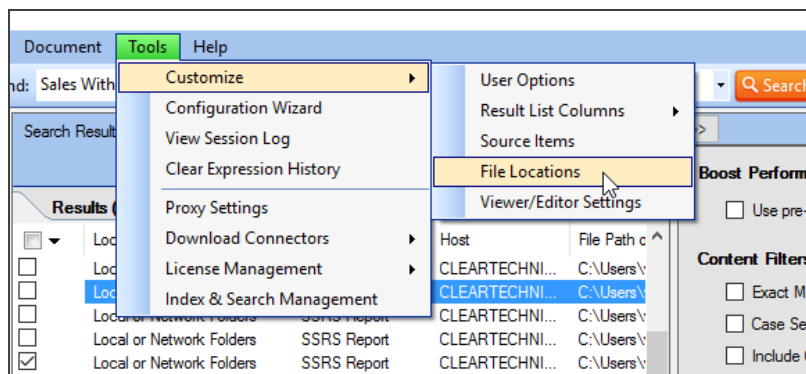
b. From the **SAP Repository** drop-down list, select Crystal Server 2013. See below:
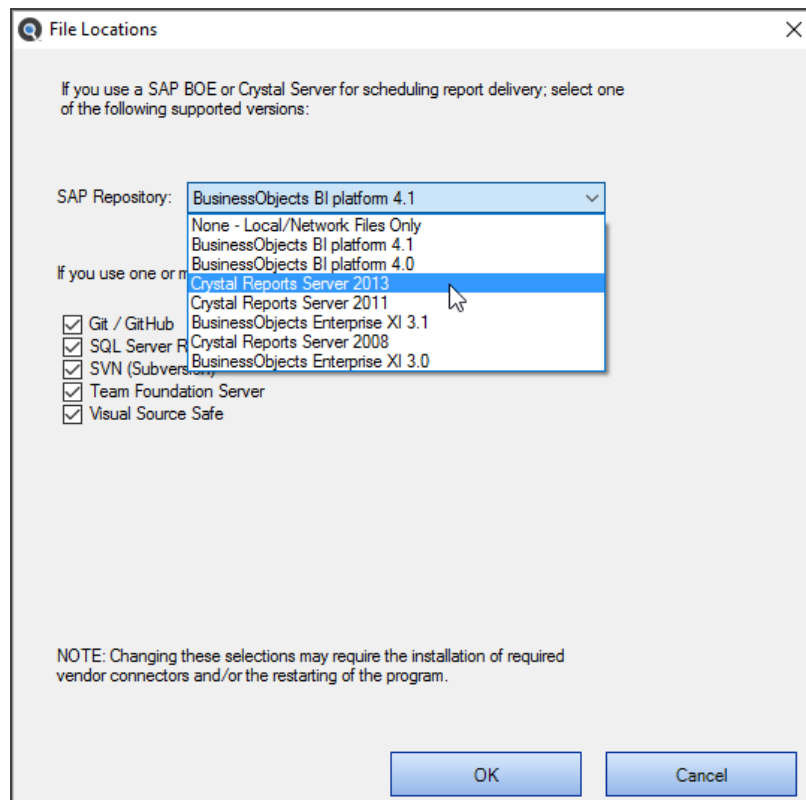
c. Click on the OK button. This may force a program restart, this is normal.

3. Install the latest BI 4.1 SP7 connector. Use this menu and follow-directions to download and install automatically:

a. From the menu, select *Tools -> Download Connectors -> BusinessObjects BI Platform* .
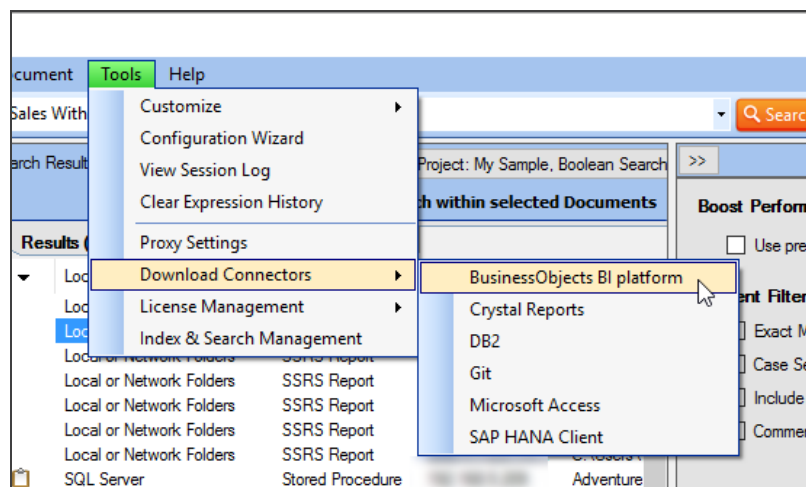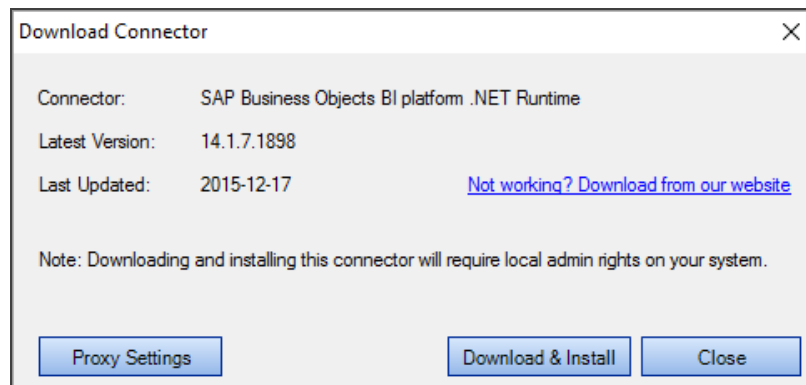
b. Click on the Download & Install button.

4. Use the change datasource wizard to automatically change the datasource and upgrade the RPT files to CR 2013 format (by default, saved files are now also in CR 2013 format). No need to open and save each RPT file individually using CR Designer 2013.

a. From the menu, select *Replace -> Crystal Reports -> Data source connections or qualified table names*.
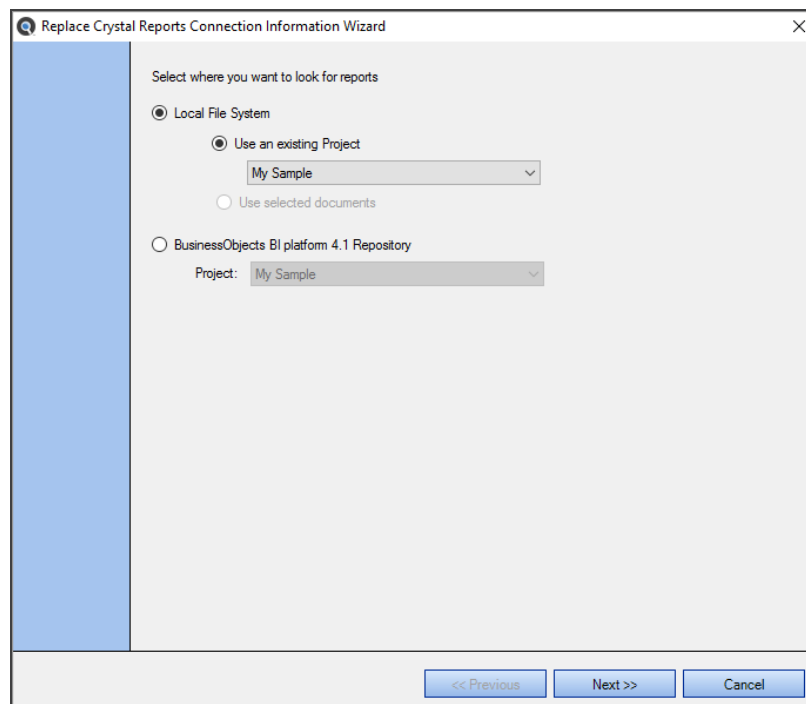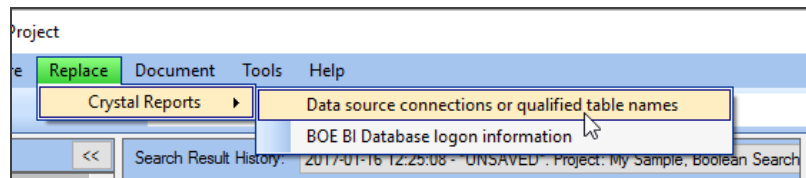
5. Use the normal CR 2013 upload exe to place all the converted RPT files into the new target CRS 2013 repository.

6. If necessary after upload, you can also use Find it EZ to set / reset login authentication on all uploaded RPT files within the new CRS 2013 repository.

    a. From the menu, select *Replace -> Crystal Reports -> BOE BI Database logon information* .
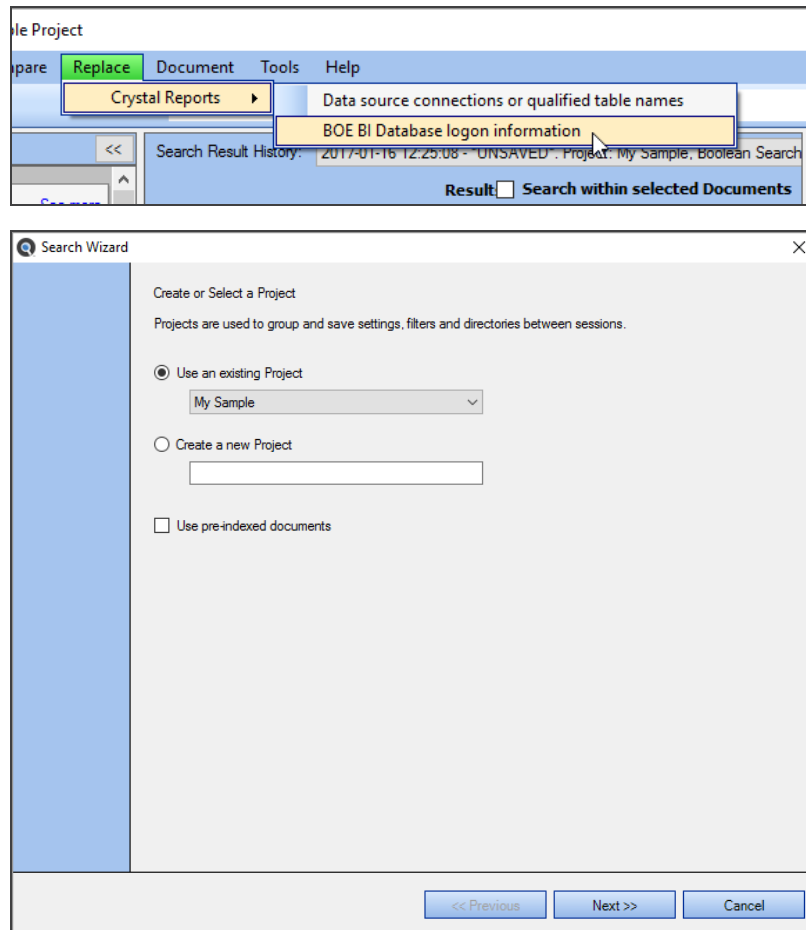
Save and View Report

When you generate a report using the **Export Wizard**, a **Save As** dialog appears. Enter a **File name** and click on the Save button. The report is created and a **Save Complete** notification appears. To view the saved report, click on the View Now button. The report will open in the selected editor.

> ## See Also:
>
> - "Document Wizards" on page 96
> - "Replace Wizards" on page 100
> - "Local or Network Folders" on page 131
> - "Repositories" on page 143

Troubleshooting and Tips

This section will provide solutions to some workstation, custom network, or programming environment issues. Also included are some suggestions for frequently asked questions and common product use hints and tips.

Reduce False Positive Matches

Problem:

When dealing with a small number of documents, it is possible for a full-text-search engine to directly scan the contents of the documents with each query, a strategy called 'serial scanning.' This is what some tools, such as grep, do when searching.

However, when the number of documents to search is potentially large, or the quantity of search queries to perform is substantial, the problem of full-text search is often divided into two tasks: indexing and searching. All Find it EZ editions use this enhanced performance and more scalable approach.

The indexing stage will scan the text of all the documents and build a list of search terms (often called an index, but more correctly named a concordance). A concordance is an alphabetical list of the principal words used in a book or electronic document, listing every instance of each word with its context, including token type (e.g. comment, language keyword, etc.) and programming language specific scope (e.g. report page section, etc.). In the search stage, when performing a specific query, only the index is referenced, rather than the text of the original documents.

The indexer will make an entry in the index for each term or word found in a document, and note its relative position within the document.

Free text searching is likely to retrieve many documents that are not relevant to the intended search question. Such documents are called false positives.

Solution:

Within Find it EZ, false positive matches can be significantly reduced using the following methods:

Local or Network Folders:

- "Add or Edit Search Path(s)" on page 133

  > **Note:** You can exclude sub-folders and / search specific individual or multiple paths.

- "Include Archive Files" on page 136

  > **Note:** Archive files are excluded by default; including them will extract and search the contents of all files within the archive (e.g. "zip") file.

- "Exclude Files or Folders" on page 137
- "Apply File Filter" on page 140

Repositories (Version Control Systems or Report Distribution Schedulers):

- "Select Repository Folders" on page 147

  > **Note:** You can limit the number and specific folder contents included.

- "Apply Report Filter" on page 147

Databases:

- "Connection Information - Databases" on page 153

> **Note:** You can search a subset of database objects.

- "Apply Database Item Filters" on page 156

> **Note:** You can include a filtered set of database items, selected by name (tables, views, stored procedures, triggers, etc.).

- "Reset Search Defaults" on page 154

Reporting Utilities:

- "BI Reports" on page 161

> **Note:** You can include specific report "(page) sections," "(search in) areas," and "search (elements)" unique to each report type.

- You can **Use defaul settings** (see link above) to reset the type of data searched to the most common code areas only by report type.

Documents:

- "Microsoft Excel Search Options" on page 169

Programs:

- "Add or Remove File Extensions Searched" on page 166

> **Note:** You can add or remove custom file extensions to be searched for text-based files.

See Also:

> ## See Also:
>
> - "Search Within Result Documents" on page 182
> - "Set User Options" on page 46; note setting for "**Limit the number of matches per object to**" can be reduced from the default of 1000.
> - "Perform a Regular Search" on page 109; note the settings available in the **Options** section - **Content Filters** category.
> - "Use the Expression Builder" on page 115; for assistance building complex Boolean queries.

Identify reports using a specified connection

Problem:

You need to determine if there are Crystal Reports using a specific ODBC connection to an underlying data source.

Solution:

There are a couple of ways you can do this using Find it EZ.

Ensure that searching connection information is enabled in the Crystal Report settings:

- In the **Source** Panel in the **BI Reports** section, click to check the **Crystal Reports** source, as below:
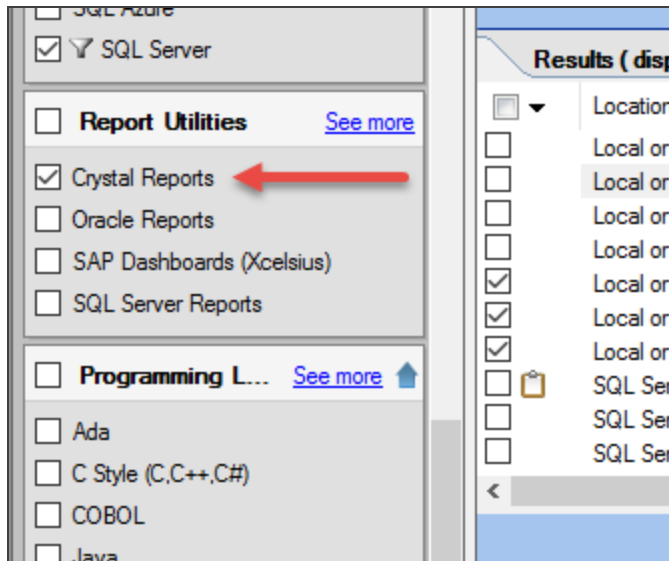
- Open the Crystal Reports project settings: from the menu, select **Projects -> Settings -> Crystal Reports**
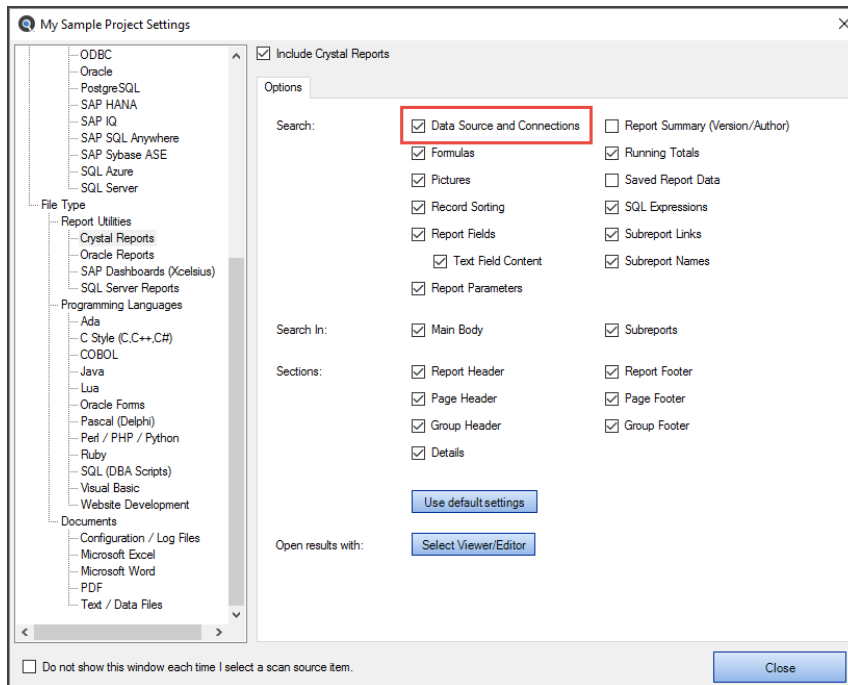
- In the **Search** section, click to check the **Data Source and Connections** option

Then,

1. Good - Run a Boolean search for {ODBC} AND {DSN}; where DSN is your DSN. That should find all of the reports with that connection.

   OR

2. Best - Generate the "SQL Code Extract" Report which will list all of the connections used in your reports. You can then filter and sort the spreadsheet to those using ODBC and a certain connection.

Note: We cannot "follow the link" so to speak. Where a report is using an ODBC connection called PRODUCTION and that is pointing to dblive01, we will not be able to show you dblive01.

See Also:

- "Perform a Regular Search" on page 109
- "Create a SQL Statements Detail Extract" on page 232

Program freezes when attempting to index Crystal Reports on a local or network file system

Problem:

When attempting to index a number of Crystal Reports files, the search panel animated gears appear to freeze and the index counter stops incrementing after a long period of time has elapsed.

Solution:

1. From the menu, select **Tools -> Customize -> User Options** .
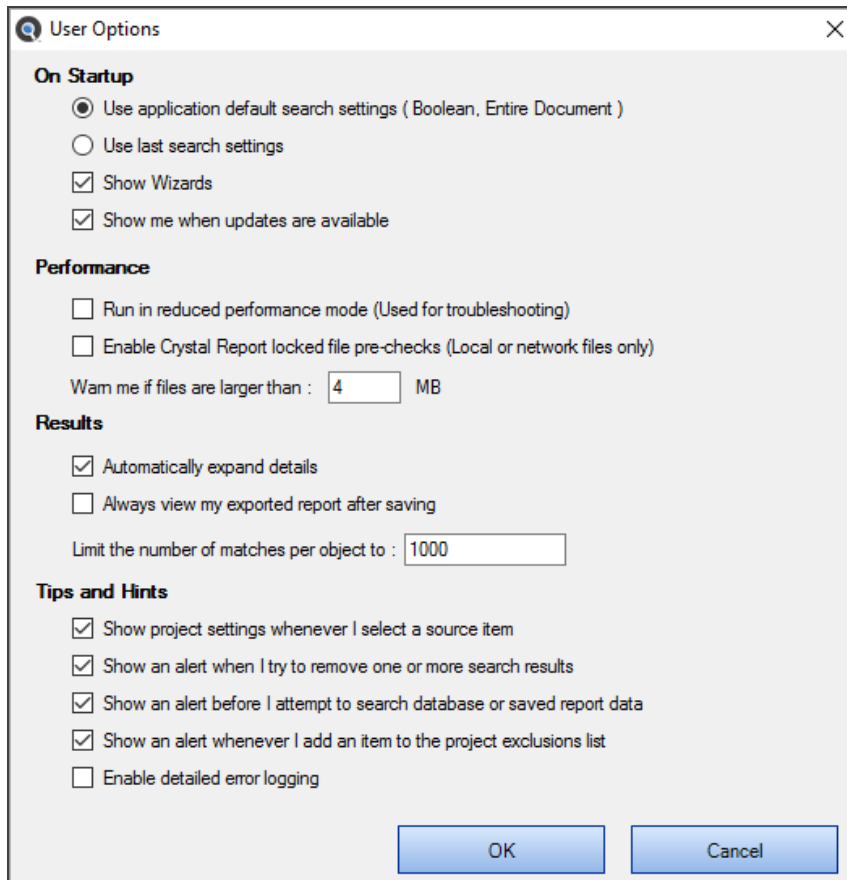
2. In the **Performance** section, click to check the **Enable Crystal Report locked file pre-checks (Local or network folders only)** option.

This allows the Crystal Reports scanner to detect locked files during indexing and, if a file is currently open or locked, to make a temporary copy of the file before allowing Crystal Reports to open it. Note that this feature is disabled by default as it can affect performance.

> **Note:** This feature is disabled by default as it can affect performance. It is recommended that you disable this performance troubleshooting option once the documents are successfully indexed.

Use of 7-Zip has been denied by your Administrator

Problem:

While indexing a project, you receive a Windows 10 message, which reads: Use of "7-Zip" has been denied by your Administrator...

> Note: This message would be generated by security software and would appear in the lower right corner of the monitor, similar to other windows alerts.

This is a dependency / prerequisite built-in open source program that our application bundles and uses for processing the following document / source file types:

- Excel (xslx)
- MS Word (docx)
- SAP Dashboards (aka Xcelsius)

As well as if you have "Include Archives" checked off under the Local File System location and you have one or more archives in your search folders.
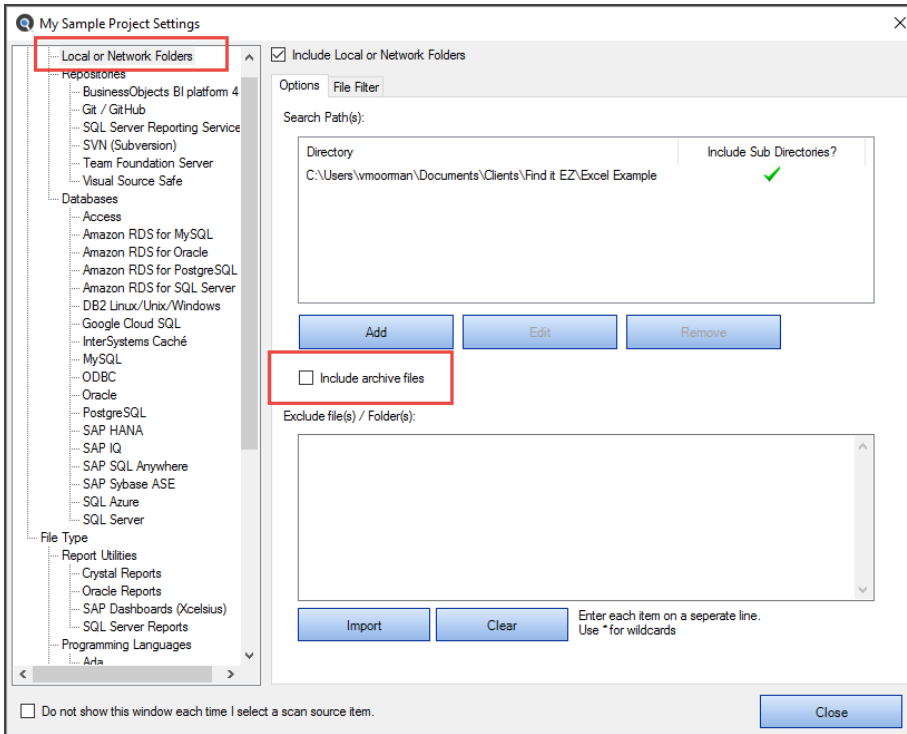
Solution:

If a system administrator enforces a rule disallowing use of the 7-zip program, then either this restriction has to be removed by the sys admin OR the end-user unfortunately cannot search the above particular document types with Find it EZ.

Note: You may even get this message when attempting to install Find it EZ while logged onto a computer without Administrative rights. You will still be able to install the program, but use of the features requiring 7-zip will record an error and may cause the program to crash.

Find text in a text box in a Crystal Report

Tip: See below.

Searching of text field content is not enabled by default but can be enabled by doing the following:

1. On the **Source** panel (on the left), right-click on "Crystal Reports." This will bring up the **Project Settings** for Crystal Reports.
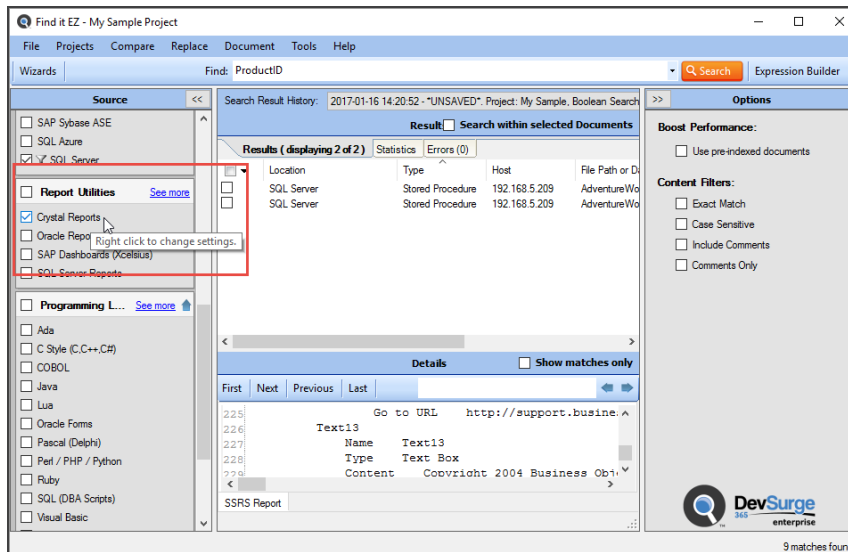
Alternatively, you can get to this window from the menu as follows: **Projects -> Settings** , then click on "Crystal Reports."
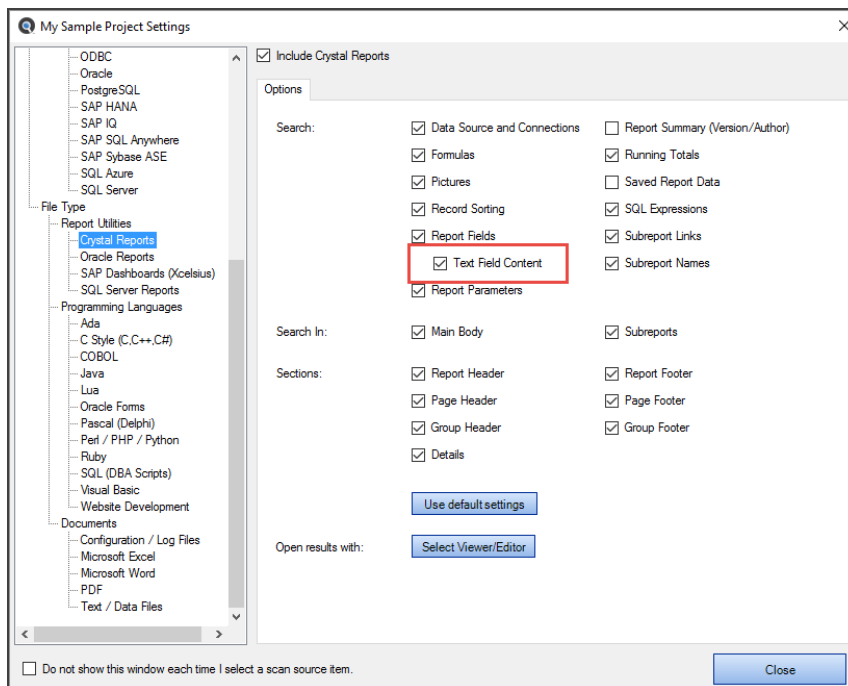
2. Click to check the **Text Field Content** option.

3. Click on the Close button.

4. The next time a search is done it should look through the text box content for you.

List of VSS folders slow to load

Problem:

When configuring a Visual Source Safe in particular, retrieving a list of folders to search within a selected branch can take a long time to load. This can also be the case with other source code version control systems.

Solution:

Rather then using a native connection to the version control system within Find it EZ project source settings, alternatively, you can recursively pull a copy of a branch using the native version control system client to save a temporary copy of all folders and files to your local workstation. Then, configure searching the local copy of the documents using the "Local or Network Folders" path rather than a connection to the version control system source within your Find it EZ project.
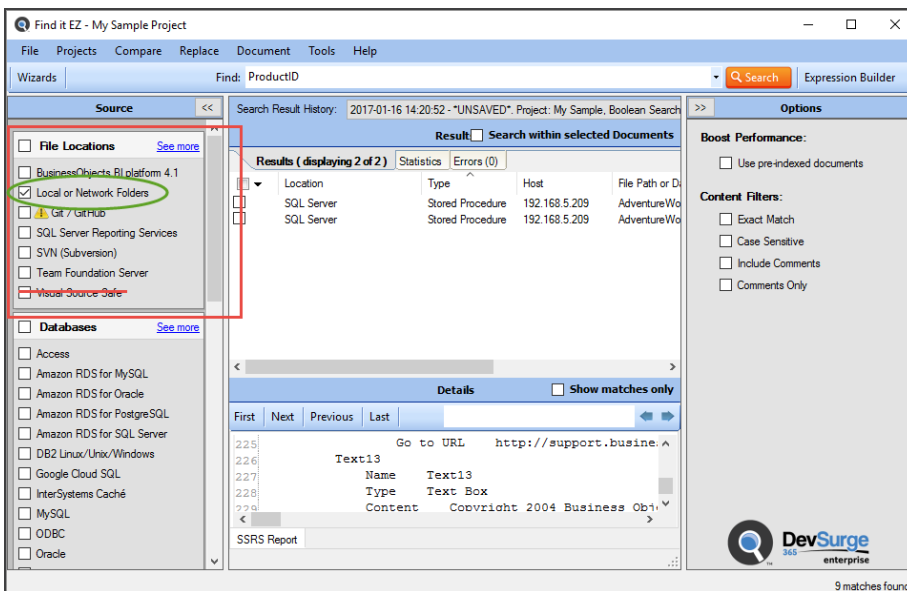
This will eliminate the overhead and latency with use of the vendor connector API as well as any possible network bottlenecks when retrieving remote folders and documents.

> **Note:** The downside to this alternative is that you would have to ensure you refresh your local copy of files as needed. However, Find it EZ indexing / index refresh will be dramatically improved using this two step approach.

Find it EZ Support

This section describes the many support options available with Find it EZ, how to send feedback, report a bug, or a request a feature to Find it EZ Software Corp.., and to view or send your session log.

Support Options

Support Option	Navigation
Contact Find it EZ Software Corp.	**https://www.finditez.com/support/#contact**
Frequently Asked Questions	**https://www.finditez.com/support/#faq**
Search Knowledge Base	**https://www.finditez.com/support/#kb**
Syntax and Examples	**https://www.finditez.com/support/#syntax**
Request a Demo	**https://www.finditez.com/support/#demo**
Watch Instructional Videos	**https://www.finditez.com/resources/#by_video**
View Session Log	From the program menu, select *Tools -> View Session Log* . The session log will open in Notepad. Each event line will start with the event date and time, followed by details.
Send Logs to Support	From the program menu, select *Help -> Send Logs to Support*
Check for Updates	From the program menu, select *Help -> Check for Updates* .

My Find it EZ Account

This section describes how to register for and manage your Find it EZ account, access software downloads, and manage serial numbers, quotes, orders, support tickets, and sending feedback.

My Account

The **My Account** tab on the member website allows you to manage your contact information, update alerts, subscriptions, and change your password. This section will describe how to register for and log in to manage your Find it EZ account.

Once registered, you can log in to the secure member area of Find it EZ, where you can change your password, download product updates, update your email subscriptions, retrieve product activation keys, view order history, process payments, check on the status of or submit new support tickets.

Register for a free Find it EZ member account:

> **Note:** You must use a valid corporate e-mail domain address. Free or blacklisted email domains (e.g. gmail, hotmail, etc.) are not accepted. This includes your primary e-mail address associated with a social account (LinkedIn, Twitter, Google Plus, or Facebook.

There are three ways to register for a Find it EZ member account.

Option 1:

1. Visit **https://www.finditez.com/register**.
2. Fill in the **New User Registration** form.

New User Registration

Email Address:	●
Confirm Email:	●
Password:	●
Confirm Password:	●
First Name:	●
Last Name:	●
Company Name:	
How did you hear about us?:	A friend or colleague told me ▼
Are you Human?	☐ I'm not a robot reCAPTCHA Privacy - Terms

Register

Note: Items with dots are required. The **Are you Human?** option must also be checked.

3. Click on the Register button. A verification email will be sent to the provided email address.

4. To complete your registration, click on the link in the email . The website will open and you will be logged in automatically.

Option 2:

1. Register for a free trial following these steps:

2. Visit **https://www.finditez.com** and click on any one of the trial download links or buttons.

3. Fill in the **Start your tree trial** form.

4. Click on the Download Trial Now button. A separate welcome and trial key emails will be sent to the provided email address.

Option 3:

Use one of your social media accounts to sign-in following these steps:

1. Visit **https://www.finditez.com/login**.

2. Click on any one of the available social account sign-in buttons located on the right. See below:

3. When prompted, accept the social account access. The secure member site will open with the **My Account** tab selected and a welcome email will be sent to your associated email address with a random password assigned.

> **Alert:** We highly recommend that you change the temporary password as soon as possible.

> **Note:** New login accounts are automatically associated with and linked to a pre-existing company account based on matching corprate email domain. This provides instant shared access to internal support tickets and serial numbers for a given entity.

Log In to Your Find it EZ Member Account

There are two ways to log into the secure member area:

Option 1:

To log in to your Find it EZ member e-mail account, follow these steps:

1. Visit **https://www.finditez.com/login**.
2. Enter your account **Email Address** and **Password**.
3. Click on the Log In button. The secure member site will open with the **My Account** tab selected.

Option 2:
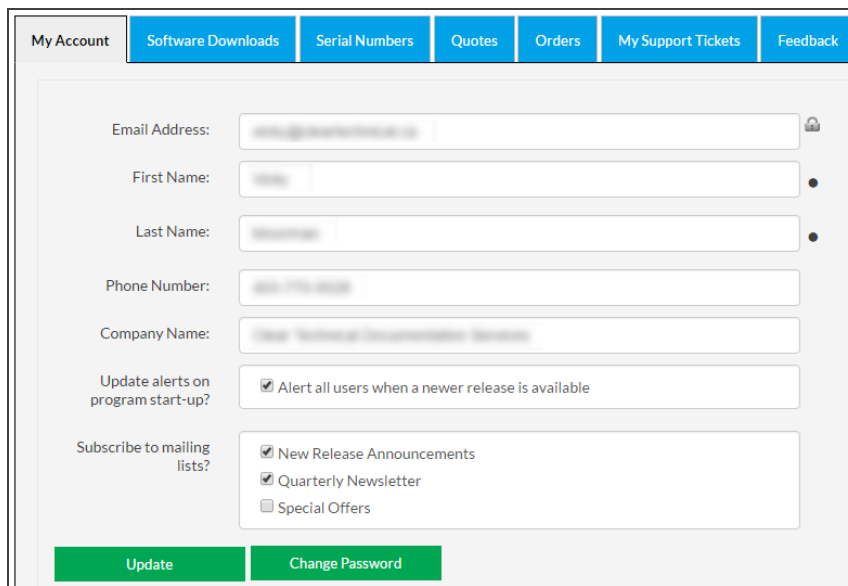
To sign-in with one of your social accounts linked to your email address, follow these steps:

1. Visit **https://www.finditez.com/login**.
2. Click on any one of the available social account sign-in buttons. See below:

3. If prompted, accept the social account access. The secure member site will open with the **My Account** tab selected.

Update Account Details and Preferences

1. Log in to your Find it EZ Member Account.
2. On the **My Account** tab, make changes as desired.

3. Click on the Update button to save.

Change Account Password

1. Log in to your Find it EZ Member Account.

2. On the **My Account** tab, click on the Change Password button. A **Change Password** dialog box will appear.

3. In the **Password** and **Confirm Password** fields, enter and confirm the new password.

4. Click on the Update button to save your changes.

5. Click on the X button to close the **Change Password** dialog box.
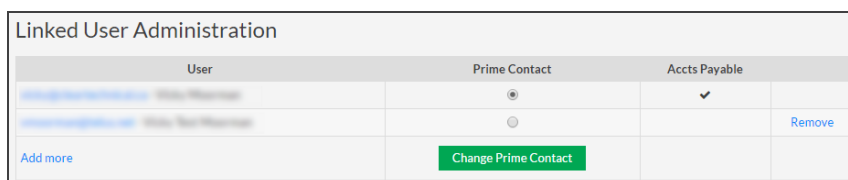
Manage Linked User Accounts

Add New Account Contacts

To add additional end-users associated with your company, so that they may have direct access to download software updates, self-serve license key management and support, simply follow the steps below:

> **Note:** Only the primary company account contact can make these changes.

1. Log in to your Find it EZ Member Account.

2. On the **My Account** tab, scroll down to locate the **Linked User Administration** section.

3. In the **User** column, click on the **Add more** link. The **Add New Contact** dialog box will appear.

4. Enter information for the new contact.

> **Note:** You must use a valid corporate email domain address. Free or blacklisted email domains (e.g. gmail, hotmail, etc.) are not accepted.

> **Note:** Accounts payable contacts have access to view and remit secure online payment for orders and/or quotes, regardless of which company contact created the order.

5. Click on the Add button to save. If a password was not entered, a temporary one will be sent to the new contact.

> **Alert:** We highly recommend that the new contact logs in and changes his/her temporary password as soon as possible.

6. To add another contact, click on the Add Another button and repeat steps 4 and 5 above. Or, click on the **Cancel** or X button to exit.

Change Prime Account Contact

> **Note:** Only the primary company account contact can make this change. Once changed, all notifications, renewal alerts, etc. are sent to the new contact automatically.

1. Log in to your Find it EZ Member Account.

2. On the **My Account** tab, scroll down to locate the **Linked User Administration** section.

3. In the **Prime Contact** column, click to choose the new prime/admin contact.

4. Click on the Change Prime Contact button to save your change. See example below:

Remove an Account Contact

If a staff member is no longer with your organization or department, you can remove access to your Find it EZ company licenses and product order information (applicable to accounts payable contacts only) as follows:

Note: Only the primary company account contact can make these changes.

1. Log in to your Find it EZ Member Account.

2. On the **My Account** tab, scroll down to locate the **Linked User Administration** section.

3. Locate the name of the contact you want to remove from your account.

4. In the far right column, click on the corresponding **Remove** link. A confirmation message will appear.

5. To remove the selected contact, click on the Yes button. The contact will be removed from the list.

6. To cancel, click on the No button.

Manage Company Address Records

Your company address records are automatically added and/or updated during the order check-out process.

In addition to being able to select, add, or update address records using our secure cart check-out process, any active contact may also add, update, or remove address records that are linked to the company profile. These changes are immediately reflected and available for subsequent online orders placed.

Add Company Address

1. Log in to your Find it EZ Member Account.

2. On the **My Account** tab, scroll down to locate the **Address List** section.

3. In the **Company Address** column, click on the **Add more** link. The **Address Information** dialog box will appear, as below:

Address Information

Contact Name:

Email:

Phone:

Company:

Address Line 1:

Address Line 2:

City:

Country:

Please Select ▼

Prov / State:

Postal / Zip Code:

Save   Cancel

4. Enter or select company location information.

> **Note:** Items with a dot are required.

5. Click on the Save button. The new address will be added to the list.

Address List

Company Address	Contact	
My Business 1234 Happy Street SE Calgary, AB T2C 3J9 CA	My Business	☑ | 🗑
My Other Business 5678 Somewhere St NW Calgary, AB T1X 0L6 CA	My Other Business	☑ | 🗑
Add more		

Update Company Address

1. Log in to your Find it EZ Member Account.

2. On the **My Account** tab, scroll down to locate the **Address List** section.

   ### Address List

Company Address	Contact	
My Business 1234 Happy Street SE Calgary, AB T2C 3J9 CA	My Business	✎ | 🗑
My Other Business 5678 Somewhere St NW Calgary, AB T1X 0L6 CA	My Other Business	✎ | 🗑
Add more		

3. Locate the address you want to edit.

4. In the far right column, click on the corresponding edit icon. The **Address Information** dialog box will appear.

   ## Address Information

   Contact Name:

   My Other Business

   Email:

   Phone:

   555-555-5555

   Company:

   My Other Business

   Address Line 1:

   5678 Somewhere St NW

   Address Line 2:

   City:

   Calgary

   Country:

   Canada

   Province:

   Alberta

   Postal Code:

   T1X 0L6

   Save   **Cancel**

5. Change company location information as desired.

> **Note:** Items with a dot are required.

6. Click on the Save button.

Remove Company Address

1. Log in to your Find it EZ Member Account.

2. On the **My Account** tab, scroll down to locate the **Address List** section.

Address List		
Company Address	**Contact**	
My Business 1234 Happy Street SE Calgary, AB T2C 3J9 CA	My Business	✎ | 🗑
My Other Business 5678 Somewhere St NW Calgary, AB T1X 0L6 CA	My Other Business	✎ | 🗑
Add more		

3. Locate the address you want to delete.

4. In the far right column, click on the corresponding delete icon. A confirmation message will appear.

Last Name:	Moorman	●	✕

Are you sure you want to remove the address for: 5678 Somewhere St NW Calgary T1X 0L6 ?

Yes   **No**

5. To delete the selected company address, click on the Yes button. The address will be removed from the list. See below:

Address List		
Company Address	**Contact**	
My Business 1234 Happy Street SE Calgary, AB T2C 3J9 CA	My Business	✎ | 🗑
Add more		

6. To cancel, click on the No button.

Software Downloads

The **Software Downloads** tab on the member website allows you to download new releases and connectors and to view release notes and system requirements.

Download Release Version

1. Log in to your Find it EZ Member Account.

2. Click to select the **Software Downloads** tab. A list of product releases and optional connectors will appear.

3. Locate the product and release version that you want to download.

4. Download the product as follows:

   a. In the **Version** column, click on the product release number for the corresponding product row. The release setup file will begin to download.

      OR

   b. In the **Specs** column, click on the download icon for the corresponding product row. The system requirements will be provided. Click on the Download Now button and the corresponding release setup file will begin to download. See example below:

5. Locate and launch the downloaded *.exe setup file from your target system. A Find it EZ **InstallShield Wizard** dialog box will appear.
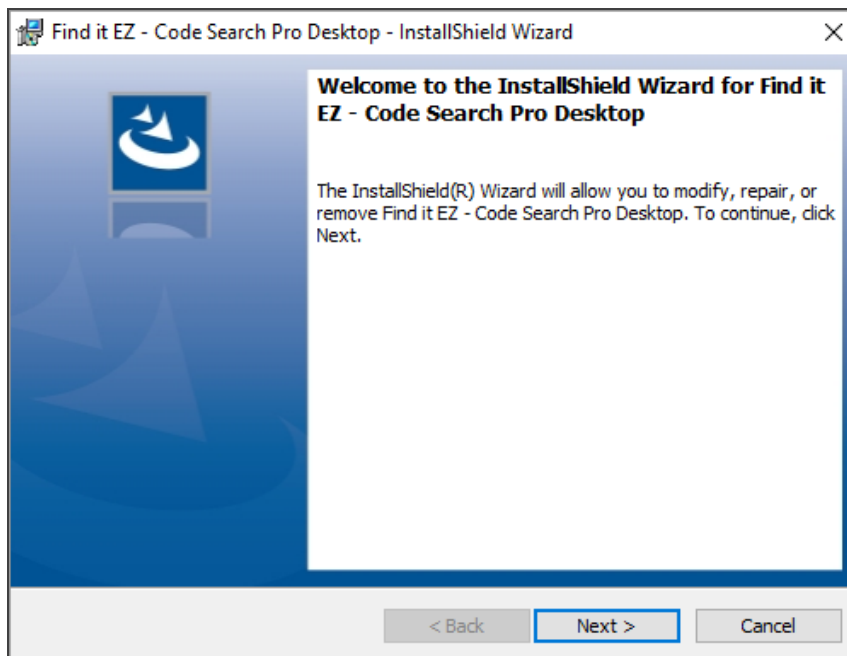
6. Click on the Next button.

7. Read and follow the installation instructions.

8. When complete, click on the Finish button.

Note: The same product setup files are used for both trials as well as full release or upgrade installs.

See Also:

- "Download Connectors" on page 280
- "View Release Notes" below
- "View System Requirements" on page 278
- "Installation, Activation, and Updates" on page 3

View Release Notes

From the Program:

1. From the Find it EZ menu, select **Help -> View Release Notes**. **Release Notes** will open in a new browser window showing the most recent information first.

2. Scroll down to view historical notes.

3. To close **Release Notes**, close the browser tab or window.

On the Public Website:

1. Visit **https://www.finditez.com/products/#release**.

| Overview | Pricing | Release info | Screenshots | What can it search? |

⊕ Code Search Pro Desktop

⊕ Code Search Pro Server

⊕ Dev Surge 365 Enterprise

⊕ Dev Surge 365 Ultimate

⊕ Community Edition

2. Click the + (expand) button to view details for the desired product edition.

| Overview | Pricing | Release info | Screenshots | What can it search? |

⊕ Code Search Pro Desktop

⊕ Code Search Pro Server

⊖ Dev Surge 365 Enterprise

Release 17.1.2 (Dec 20, 2016)

What's new in the latest release:

▸ *NEW* integrated wildcard "word" search within Boolean expressions.
▸ Removed separate wildcard search type, now included in default (Boolean) search type.
▸ *NEW* Exact match (word or string) filter to reduce false-positives when applicable.
▸ Performance Enhancements:
▸ Application startup times have been reduced by 95 %
▸ Initial full index times have dropped by 60%
▸ Re-fresh index (update changed source documents only) times have dropped by 99%
▸ Search step times have dropped by 95%
▸ Improved index stability and program scalability.
▸ Renamed buttons "Search Assistant" to "Wizards" and "Advanced" to "Expression Builder" on main app search bar.
▸ Fixed a bug in **Compare** that prevented differences from being listed in versions 17.0.0 through 17.0.17 inclusive.

📄 Full Release Notes

Starting @ $468 per user (includes 1 year software assurance & unlimited free support plan)

Under Development

▸ Scan projects, branches, files within additional Source Control Management repository including Perforce P4, Surround SCM, Mecurial and CVS.
▸ Add support for data dictionaries and ETLs such as SSIS, SSAS, SAP BOE Universes.
▸ Add support for generic OLE DB databases, Informix and SQLite databases.
▸ Add support for MS Access ACCDB (2007 +) databases.
▸ Add support for Tableau, Qlikview, Logi Analytics, SAP Lumera, Webi (Web Intelligence), IBM Cognos.
▸ New "Sequential Words" search patterns ... find the word "this" followed by "that" within "x" words.

Have any other specific needs? Submit your ideas or requests directly to our development team.

3. View a summary of the latest release highlights, and click on the **Full Release Notes** link for more detail.

On the Member Website:

1. Log in to your Find it EZ Member Account.

2. Click to select the **Software Downloads** tab. A list of product releases and optional connectors will appear.

		Download Release					Download Connectors					
Product	Version	Date	Notes	Specs	.net	HANA	Crystal Reports	DB2	Access	BI 4.1	XI 3.1	Git
Code Search Pro - Desktop 2017	17.1.2	2016-12-20	📄	⬇	4.5	1.00.097	13.0.17	10.5	2007			
Code Search Pro - Server 2017	17.1.2	2016-12-20	📄	⬇	4.5	1.00.097	13.0.17	10.5	2007			
Dev Surge 365 - Enterprise 2017	17.1.2	2016-12-20	📄	⬇	4.5	1.00.097	13.0.17	10.5	2007	14.1.7	12.7	2.7.1
Code Search Community	17.0.5	2016-09-28	📄	⬇	2.2							
Eclipse Plugin	1.1.6	2011-07-19		⬇								

3. Locate the product release for which you want to view release notes.

4. In the **Notes** column, click on the corresponding note icon. A **Release Notes** dialog box will appear showing the most recent information first.

17.0.18 - Nov 30, 2016

It is recommended that all users upgrade to this release.

Due to fixes in this release, your index will be reset.

APPLICATION

▸ Fixed a bug that was preventing the "Section" column from being displayed properly in the File -> Export -> Search Result Details report
▸ Fixed a bug where sorting of columns was not working correctly if one or more columns were hidden
▸ Fixed a bug where PDF documents where not being indexed but not searched.

DETAILS

Number	Summary
2293	Saved search results details "section" column is blank
2303	Performance Improvement - Split Index
2310	Cosmetic issues
2317	PDF - not finding matches unless "Use Pre-indexed Documents" is checked off.
2321	Connection Change Wizard - Clicking on the first table list column caused Find it EZ to crash
2325	When a result column is hidden sorting is not working correctly
2326	Index files are removed but the mapping is not, causes errors during search.

5. Scroll down to view historical notes.

6. To close the **Release Notes** dialog box, click on the X button.

View System Requirements

All editions of Find it EZ programs require a Microsoft Windows operating system that can run .net 4.5 or newer. For detailed technical specifications, see **https://msdn.microsoft.com/en-CA/library/8z6watww** . For individual edition requirements, see below.

On the Website:

1. Log in to your Find it EZ Member Account.

2. Click to select the **Software Downloads** tab. A list of product releases and optional connectors will appear.

3. Locate the product release for which you want to view system requirements.

4. In the **Specs** column, click on the corresponding download icon. A **System Requirements** dialog box will appear.

5. To download the selected product release, click on the Download Now button.

6. To close the **System Requirements** dialog box, click on the X button.

Download .NET Framework

Alert: The .NET framework connector is required. If you do not have the required .NET 4.5 pre-installed, you will be prompted to download this prerequisite from Microsoft. We provide an alert and link to the appropriate download page depending on the Windows operating system you are running. The program will not launch until .NET 4.5 is installed.

On the Website:

1. Log in to your Find it EZ Member Account.

2. Click to select the **Software Downloads** tab. A list of product releases and optional connectors will appear.

3. Locate the product release for which you want to download the .NET framework.

4. In the **.net** column, click on the corresponding .NET version number. A **Microsoft.NET Framework** dialog box will appear.
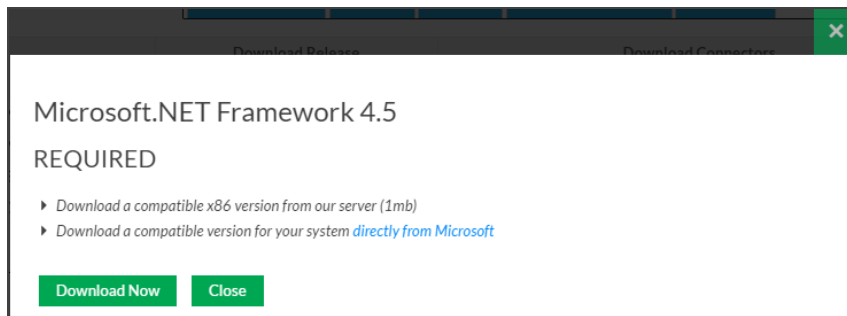
5. To download the selected version from the Find it EZ server, click on the `Download Now` button. OR

6. To download the selected version directly from Microsoft, click on the **directly from Microsoft** link.

7. To close the **Microsoft.NET Framework** dialog box, click on the **Close** or `X` button.

Download Connectors

Source items that require a connector will appear with a small warning icon preceding the name. See example below:

> **Note:** Some connectors are required (e.g. '.net') but others are optional (depending on whether or not you want to search a particular document type that then needs a corresponding vendor supplied connector). After product install on first run configuration wizard for setting up your environment, if you select one or more source items that require connectors, the wizard will prompt you to auto-download and install them. If you do not do so, or later add a source item, you will note that it has a yellow alert triangle icon next to it in the left (**Source**) panel. If you attempt to include such a source item in a project, you will be prompted to auto download and install the required connector.

Click on the source item/warning to download the associated connector.

If you try to initiate a search that includes a selected source lacking a required connector, an error message will be generated. See example below:

From the Program:

> **Note:** Downloading and installing a connector will require local administrative rights on your system.

1. From the Find it EZ menu, select **Tools -> Download Connectors -> [Connector Name]** .

A **Download Connector** dialog will appear.

2. Where applicable, click on the Proxy Settings button. A **Proxy Settings** dialog will appear.

3. Enter your proxy credentials for the selected connector.

> **Note:** If you don't know your proxy credentials, please contact your network administrator.

4. When settings are complete, click on the OK button to save.

5. Click on the Download & Install button. The connector will begin downloading.

    a. Once downloaded, a Find it EZ**InstallShield Wizard** will appear.

    b. Click on the Next button.

    c. Read and follow the instructions provided.

    d. When complete, click on the Finish button.

On the Website:

1. Log in to your Find it EZ Member Account.

2. Click to select the **Software Downloads** tab. A list of product releases and optional connectors will appear.

3. Locate the product release for which you want to download a connector.

4. In the **Download Connectors** section of the table, click on the corresponding version number in the desired connector name column. A **Connector Details** dialog box will appear. See example below:

5. To download the selected version from the Find it EZ server, click on the Download Now button. OR,

6. Where applicable, to download the selected version directly from Microsoft (i.e. Access) or directly from SAP (i.e. Crystal Reports), click on the **directly from Microsoft** or **directly from SAP** link, respectively. See example above.

7. The connector will begin downloading.

    a. Once downloaded, a Find it EZ **InstallShield Wizard** will appear.

    b. Click on the Next button.

    c. Read and follow the instructions provided.

    d. When complete, click on the Finish button.

8. To close the **Connector Details** dialog box, click on the **Close** or X button.

SAP Repositories - Compatibility Table

Below is a compatibility table for SAP repositories:

BI 4.1

- BusinessObjects BI platform 4.1
- BusinessObjects BI platform 4.0

- Crystal Reports Server 2013
- Crystal Reports Server 2011

XI 3.1

- BusinessObjects Enterprise XI 3.1
- BusinessObjects Enterprise XI 3.0
- Crystal Reports Server 2008

Serial Numbers

The **Serial Numbers** tab on the member website allows you to manage or transfer your current Find it EZ product license, obtain a new trial license, activate or manually activate a product, review software assurance plans and license type options.

Follow the steps below to view your current Find it EZ product serial numbers.

View or Transfer Current License

Alert: You must have an active maintenance plan in order to request a license transfer. License transfers require review and approval. Reviews are completed within one business day, upon which you will receive a confirmation email either approving or declining the request. Once transferred, the Find it EZ program must be uninstalled from the old workstation.

From the Program:
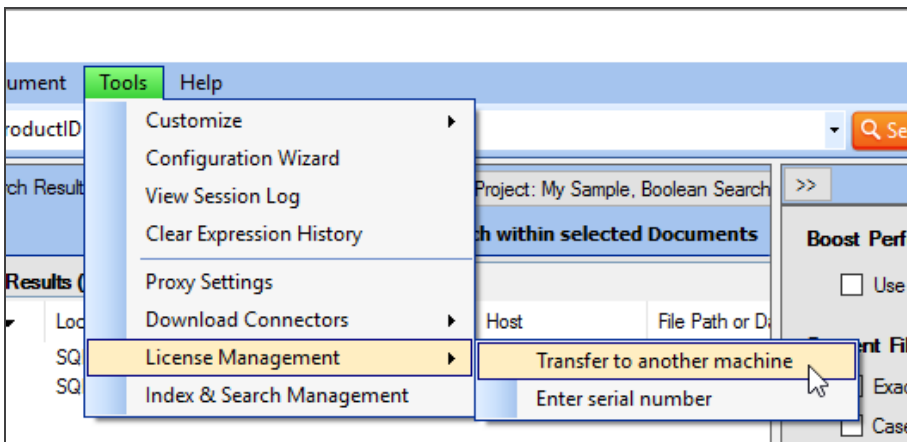
1. From the Find it EZ menu, select *Tools -> License Management -> Transfer to a new machine* . A confirmation message will appear, as below:
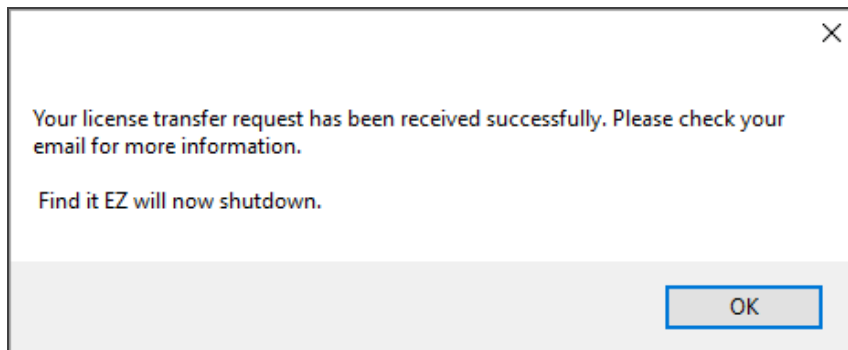
2. Click on the OK button to shut down Find it EZ on the current machine. A request will be automatically sent to Find it EZ product support, and you will receive a confirmation email once the transfer request has been reviewed and processed within one business day.

3. Open your e-mail and follow the instructions to transfer the license to a new machine.

On the Website:

1. Log in to your Find it EZ Member Account.

2. Click to select the **Serial Numbers** tab. Locate the product for which you want to view or transfer a license.

3. Locate your active license in the list and click on the corresponding **Details** link. A **View/Transfer License** dialog box will appear.
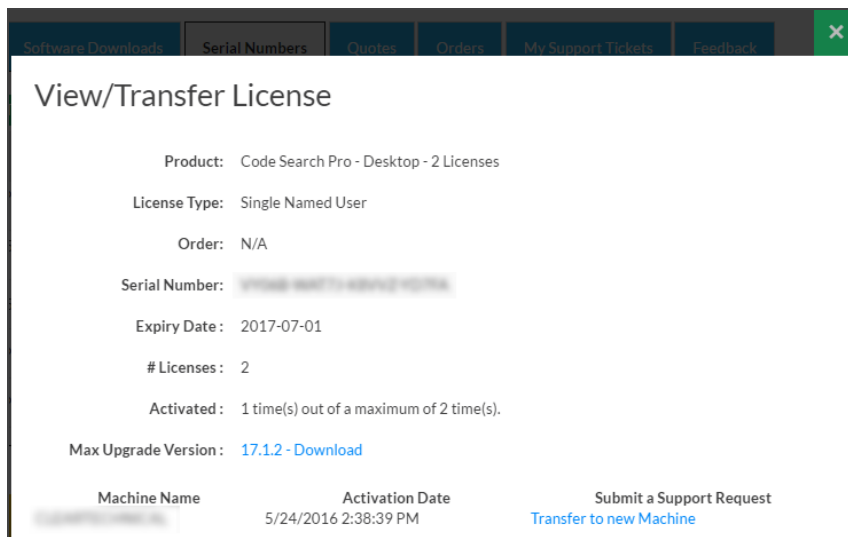
4. To download the most recent upgrade available for the selected license, click on the **Max Upgrade Version: [Version #] Download** link. The corresponding setup file will begin to download. See example below:
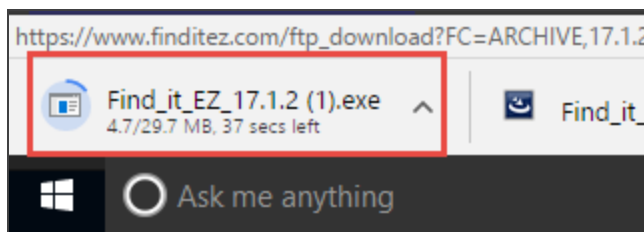
5. To transfer the license to a new machine, click on the **Transfer to new Machine** link. A confirmation message will appear, as below:
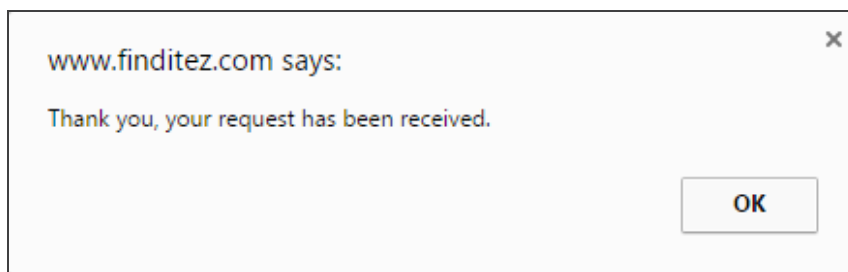
To close this message, click on the OK button.

6. To close the **View/Transfer License** dialog box, click on the X button. You will receive a confirmation email once the transfer request has been reviewed and processed within one business day.

Enter New Serial Number

From the Program:
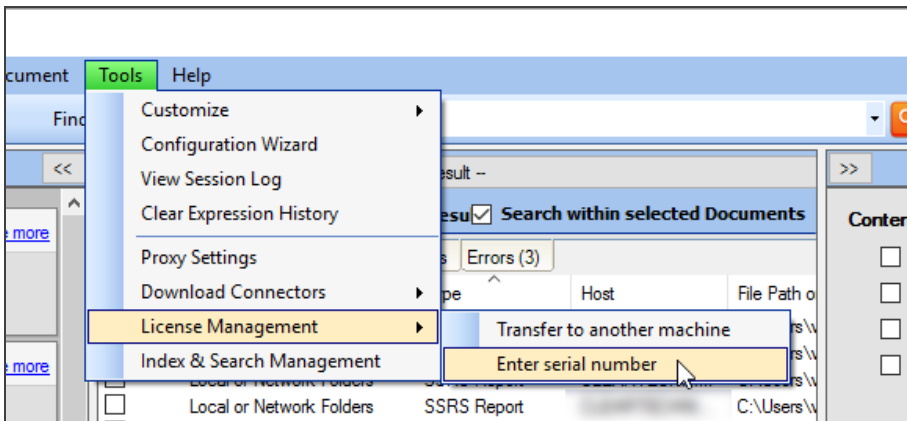
1. From the Find it EZ menu, select **Tools -> License Management -> Enter serial number** . The **Activate** dialog box will appear.

2. Fill in the required information.

   Note: Input fields with an "*" are required.

3. Click on the Activate button.

See Also:

- "Activate License" on page 18

Get a New Trial License

On the Public Website:

Visit **https://www.finditez.com/** and click on any of the "download trial" links:

The following trial download form is available in the footer area of all web pages:

The following slide-out menu is available on the right-hand side of all but the home page:

OR

Visit **https://www.finditez.com/starttrial** for direct access to the **Start your free trial** download form.

1. Complete the form and click to select the desired product edition.

2. Click on the Download Trial Now! button. If eligible, your trial setup file will begin to download and a confirmation email with your trial key will be sent to the email address provided.

On the Member Website:

1. Log in to your Find it EZ Member Account.

2. Click to select the **Serial Numbers** tab.

3. Click on the Get a New Trial License button. A **Request License** dialog box will appear.

4. From the drop-down list, select the product for which you want to request a trial.

5. Click on the Request License button. The trial license information will be sent to your account e-mail address.

6. Open your e-mail. Note the trial license serial number and click on the Download Now button.

Purchase Licenses

On the Public Website:

See "Create a New Order" on page 308

On the Member Website:

1. Log in to your Find it EZ Member Account.

2. Click to select the **Serial Numbers** tab.

3. In the **License Type** column on the left, locate the product edition for which you want to purchase additional licenses.

4. In the **Buy More** column, click on the corresponding shopping cart icon. The **Select Enterprise options** form will appear. See example below:

5. Enter the desired **Quantity**.

6. In the **Select Installation Package** section, click to choose the desired package/assurance option.

7. Click on the Add to Cart button. You will be directed to the **Shopping Cart Summary** page. See example below:

8. To add more items, click on the + Add more items button.

9. To edit or delete an item, click on the corresponding icon located to the right of each item. The **Installation Package** (drop-down) and **Quantity** (text box) will become editable. See example below:

Make changes, as desired, and click on the **Update** link to save.

10. Where applicable, enter a discount code and click on the Apply coupon button.

11. To save the item(s) as a quote, click on the Save as quote button.

12. To buy the selected product(s) now, click on the Checkout button.

Software Assurance Plans

There are two types of licenses and corresponding maintenance (software assurance) plans:

Code Search Pro (Desktop and Server)

- Perpetual licenses. First year software assurance included.

- After year 1, software assurance is optional. However, if you do not renew and want access to an upgrade (newer release than the last one available when your software assurance lapsed), you must buy a new license. Upgrade discounts may be considered at our discretion on a case by case basis.

Dev Surge 365

- SaaS licenses. Software assurance included.

- Renewal is mandatory for use of the software. Otherwise, once your subscription expires, the software stops working.

What Software Assurance includes:

- Unlimited support incidents. Direct access to our support (development) team via phone, WebEx, remote desktop, email, etc.

- Ability to request a license transfer (approval only possible if on an active software assurance plan). This can be required if on change of employee or reconfiguration / major upgrade of the workstation (e.g. newer operating system, change of workstation name on the company domain, major hardware upgrade such as hard drive, etc.).

- Access to new software release upgrades.

Software assurance is typically quoted / invoiced for a one year period. During payment remittance, you can choose to take advantage of extending your software assurance period to:

- Save 5% for 2 year; 10% for 3 year plans.

- Enjoy the convenience of only have to renew every 2 or 3 years instead of annually.

- Coordinate with a PO process to reduce overhead and approval requirements.
- Take advantage of available surplus budget when possible.

For more information about our software assurance plans:

- Visit **https://www.finditez.com/cart/** and click on the **Support and Upgrades** or the **License Information** links at the top of the **Product Catalog** page for more detail and definitions.
- Click on any Select Options button for a product line item. Note that you can get a discount on extending your pre-paid support plan. Click to expand the **Software Assurance** tab.

Annual Renewals

Annual renewal notices are sent as follows for existing customers:

If, on the final payments remittance page, you chose to "auto-renew," then you will be invoiced and will receive this invoice 45 days prior to your software assurance plan expiry date. If payment is not remitted, reminders are auto-sent 3 weeks (21 days) and again 3 days prior to support expiry. If payment is still not received, an overdue notice is sent 5 days after support expiry and collection action may commence.

If you do not check the "auto-renew" setting, then you will simply receive a renewal quote 3 months (90 days) prior to your software assurance plan expiry date. Reminders are sent 21 days and 3 days prior to support expiry.

If payment is not received after your software assurance plan expiry date, this lapse effect does the following:

- **Code Search Pro**: Keeps working, but no support responses and can no longer transfer the licenses. The member downloads panel changes to add a section for "older versions" so that you have access to download the max version you are eligible to use.
- **Dev Surge 365**: Stops working.

License Type Options

For further information about licensing, please contact **support@finditez.com**.

License types for Find it EZ products

Find it EZ products are either sold or leased under two distinct license plans:

- **Perpetual** - Permanent right to use license is purchased. First year software assurance is included with access to all minor and major upgrades for free. Optional software assurance.
- **Software As A Service (SaaS)** - Annual renewable contract lease plan. If your contract is not renewed, the product can no longer be used and all licenses are automatically disabled upon expiry of the contract term.

Under either plan, there are also two available end-user license types to chose from:

- **Name User Licenses (NULs)** - Each license is associated with a single, unique windows user login and host machine combination. NULs are transferable between machines and/or users but must go through an automated transfer request, vendor review and approval process at the sole discretion of Find it EZ.
- **Concurrent Access Licenses (CALs)** - Each license is associated with a Windows host machine, but floating amongst all domain users. Also commonly known as floating licenses. Only limited in use to the maximum number of concurrent connection (licenses) purchased.

Alert: For further information about licensing, please contact **support@finditez.com**.

Note: Dev Surge 365 Enterprise is only available in on-premise **Software As A Service - Named User Licenses**.

> **See Also:**
>
> • "License Agreements and Statements" on page 325

Quotes

A quote is a 15 day price guarantee with no obligation to pay by the customer. The **Quotes** tab on the member website allows you to compare products, create and view quotes, and pay for a quote.

Create a New Quote

1. Visit **https://www.finditez.com/**.
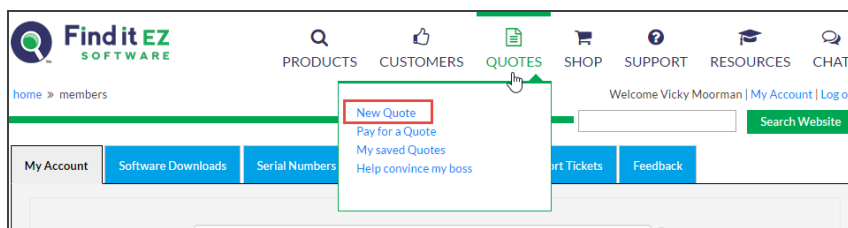
2. From the menu at the top of the page, select **Quotes -> New Quote**. The **Products Catalog** will appear.
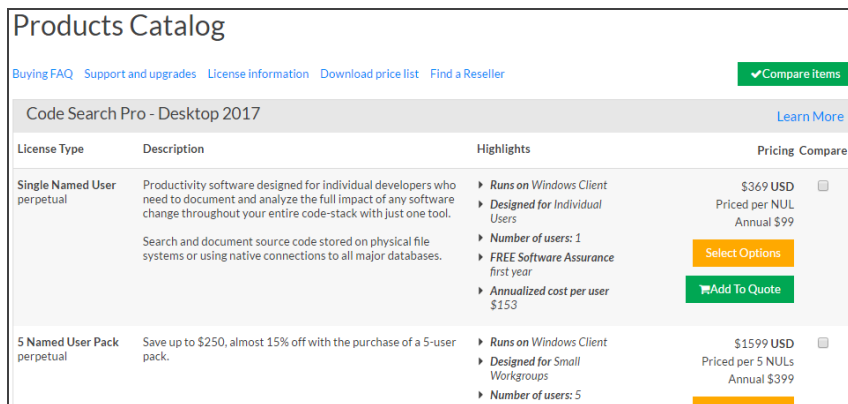
3. Using the vertical scroll bar, locate the product that you want to add to a quote.

4. Click on the corresponding green Add to Quote button. A **Quote Summary** page will appear.

5.   To add more items, click on the green + Add More Items button. The **Products Catalog** will appear (see above).

6.   To edit or delete an item, click on the corresponding blue edit or delete icon located to the right of each item. See example below:

a.   Change the **Quantity** or **Software Assurance** selection, as desired.

b.   Click on the **Update** link to save your changes.

7.   Where applicable, enter a **Discount Code** and click on the Apply Coupon button.

8.   To send the quote to Find it EZ Software Corp., click on the Send Quote button.

9.   If you are not already logged into the Find it EZ website, you will be prompted to login in order to save a copy of the quote. See below:

10. A confirmation screen will appear with your quote information along with product trial download links. See example below:

Help Convince My Boss

One or more quotes can be created and forwarded directly to the manager or department head responsible for budget approval. This wizard walks through a few questions to create a template email with one or more saved quotes automatically attached to it. This can simplify the budget approval process by comparing your industry and adjacent technologies to our existing client base, providing a list of benefits along with examples of competitors or similar companies that use Find it EZ.

1. Visit **https://www.finditez.com/**.
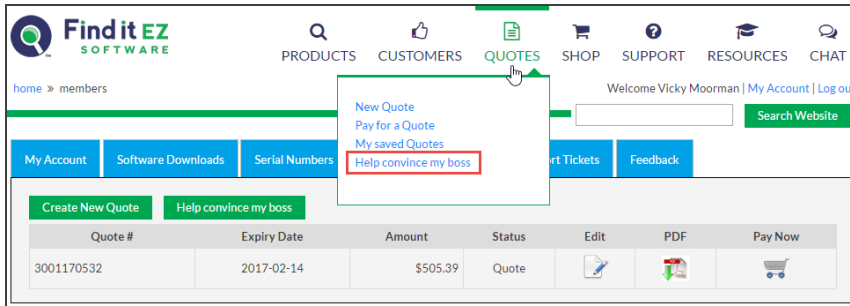
2. From the menu at the top of the page, select **Quotes -> Help convince my boss**. The following wizard step 1 will appear:
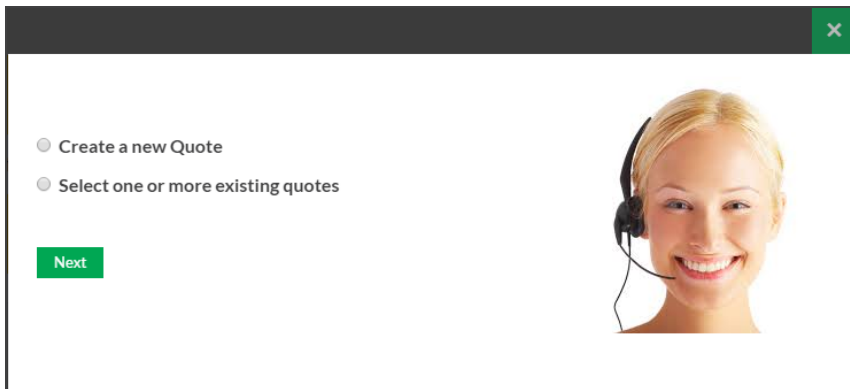
3. Click to chose "Create a new Quote" or "Select one or more existing quotes".

Note: If you have previously saved quotes, you are not logged in, and you select the latter option, you will be prompted to login, as below:
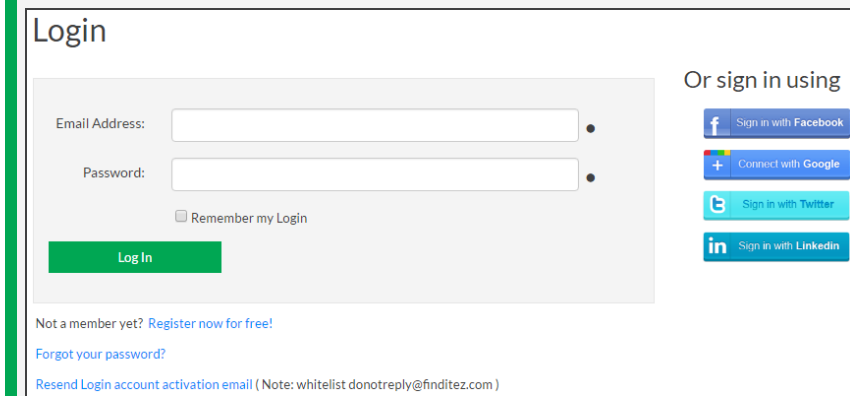
4. Once you have created a new quote or logged in to your Find it EZ account, you will be prompted to select one or more quotes to attach to the e-mail. See example below:

Select the desired quote(s) and then click on the Next button. A **Budget Approval Request** form will appear, as below:

5. Fill in the **Budget Approval Request** form. Items with a dot are mandatory. You will have an opportunity to review and change the contents of the generated email prior to sending. The more data provided in the form, the more complete the generated email template will be. Once complete, click on the Preview Now button.

6. To make changes to the email body produced, click on the Back button and repeat step 5. If the contents are approved, click the Send button. To abort, click the Cancel button.

> **Note:** If you cancel the process, but had created a new quote in step 3, the quote will still be saved to your Find it EZ account.
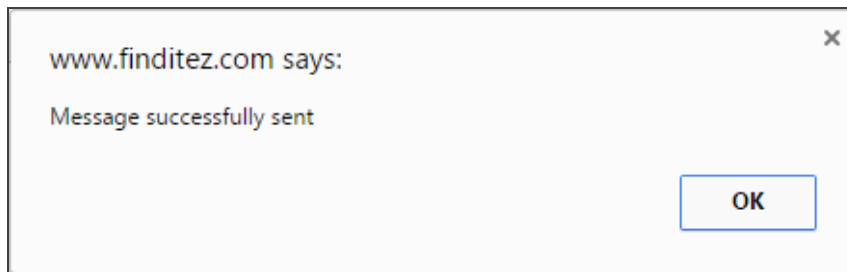
View or Change Saved Quotes

You may change the contents of a pending, open quote, including adding or removing items, increasing or decreasing item quantity, or changeing the support length for individual items in the quote.
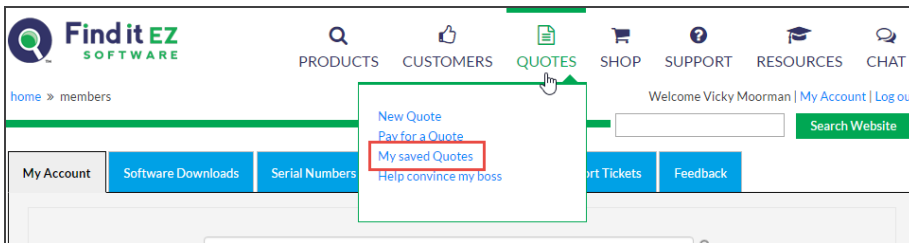
1. Visit **https://finditez.com/**. From the menu at the top of the page, select `Quotes -> My Saved Quotes`. If you are not logged in, you will be prompted to do so for access to your saved quotes.

2. Log in to your Find it EZ member account. A table will appear showing the quote **Quote #**, **Expiry Date**, **Amount**, and **Status**.

3. To edit the quote, click on the corresponding **Edit** icon.

Note: Only pending, unexpired quotes can be modified. If a quote is in a status that does not allow updating, you may create a new quote or contact Find it EZ sales support for assistance.

a. Make changes as desired.

b. Click on the Update Quote button to save and re-send the revised quote.

4. To download the quote in PDF file format, click on the corresponding **PDF** icon.

a. The quote will open as a PDF in a new browser window.

b. Download or Print the document as desired.

Pay for a Quote

1. Visit **https://www.finditez.com/**. From the menu at the top of the page, select *Quotes -> Pay for a Quote*. If you are not logged in, you will be prompted to do so for access to your saved quotes.

2. Log in to your Find it EZ member account. A table will appear showing the quote **Quote #**, **Expiry Date**, **Amount**, and **Status**.

3. In the **Pay Now** column, click on the corresponding shopping cart icon. The **Checkout** dialog box will appear.

4. Select the **Billing** and **Shipping Address**, then click on the Save and Continue button.

Checkout

Step 1 - Account details => **Step 2 - Confirm order** => Step 3 - Select Payment Method

Bill To Address	Ship To Address
My Business 1234 Happy Street SE Calgary, AB T2C 3J9 CA	My Business 1234 Happy Street SE Calgary, AB T2C 3J9 CA

Currency: [CAD]

*conversion rate from USD @ 1.3044

Your Quote contains: 1 items

Product	Unit Price (CAD)	Quantity	Total
Code Search Pro - Desktop - Single Named User	$481.32	1	$481.32
▶ *Save 5% - 2 years support & upgrades*	$122.61	1	$122.61

Sub Total:	$603.93
Taxes based on	
*Ship to Province: Alberta ▼	
GST @ 5% on $603.93	$30.20
Grand Total:	$634.13

Who should we send the invoice or reciept to?

◉ Send the invoice or receipt just to me

○ Send a copy of the invoice or receipt to this person too:

Accounts Payable Contact
☐
☐

Add New Contact

Who should we send the activation serial numbers to?

◉ Send them just to me

○ Send them to these people(s) too:

| End User Contacts |
| --- |
| ▽ Filter By Name or Email   **Apply** |
| ☐ |
| ☐ |
| ☐ |

Add New Contact

Save and Continue

5.   Review and confirm the order, then click on the ⌷Save and Continue⌷ button.

6. Select and enter the method of payment.

> **Note:** Payment by secure Credit Card or Paypal will immediately release full activation keys. Selecting payment by Check, Invoice Me, Wire Transfer, or Purchase Order will issue a net 30 day terms invoice.

> **Note:** When paying by Purchase Order, you may upload an electronic copy of the purchase order document or email a copy to **billing@finditez.com** referencing your order # in the email subject or body.

7. Click on the Process Payment button.

Orders

An order generates a net 30 day invoice. Or, if the customer proceeds through secure check-out and remits payment online (via purchase order, credit card, or Paypal account), a receipt is issued along with immediately releasing activation keys. The **Orders** tab on the member website allows you to create and view orders.

View or Change My Orders

You may change the contents of an order; including adding or removing cart items, increasing or decreasing item quantity, or changing the support length for individual items in the cart.

1. Log in to your Find it EZ Member Account.

2. Click on the **Orders** tab. All current orders on file will be listed.

3. To edit the order, click on the corresponding **Edit** icon.

Order 3001170532   Currency: [CAD]

*conversion rate from USD @ 1.3044

Your shopping cart contains: 1 items   **+Add more items**

Product	Unit Price (CAD)	Quantity	Total	
Code Search Pro - Desktop - Single Named User	$481.32	1	$481.32	✎ | 🗑
▸ 1 year support & upgrades included	FREE			

DISCOUNT CODES
Enter your coupon code if you have one.

Enter Code

✔ Apply coupon

Sub Total: $481.32
Taxes based on
*Ship to Province:
Alberta ▾
GST @ 5% on $481.32 $24.07
Grand Total: $505.39

🖺 Update order   🛒 Checkout

Cancel

Note: Only pending, active, unpaid orders can be modified. If an order is in a status that does not allow updating, you may create a new order or contact Find it EZ sales support for assistance.

     a. Make changes, as desired.

     b. Click on the Update order button to save your changes.

Thank you for your order from FinditEZ

Your payment is due by 2017-03-01. Click to pay now.

A copy of your invoice have been sent to: vicky@cleartechnical.ca

Your Invoice # 3001170532

Serial numbers are needed to remove time and limit restrictions on our software. **Your payment is due by 2017-03-01.** Upon receipt of payment, your serial numbers will be automatically generated and sent.

Quantity	Product
1	New License for Code Search Pro - Desktop (DN01SA2) Single Named User **Save 5% - 2 years support & upgrades upon receipt of payment.**
	Serial Numbers for activation
	Code Search Pro - Desktop 2017 issued upon receipt of payment
	Download this product

Need to download your software?

You can do this at any time from our download page:

Software download page

Want a copy of your Invoice?

If you are a US based customer, you may also download a copy of our W-8BEN-E for withholding tax exemption.
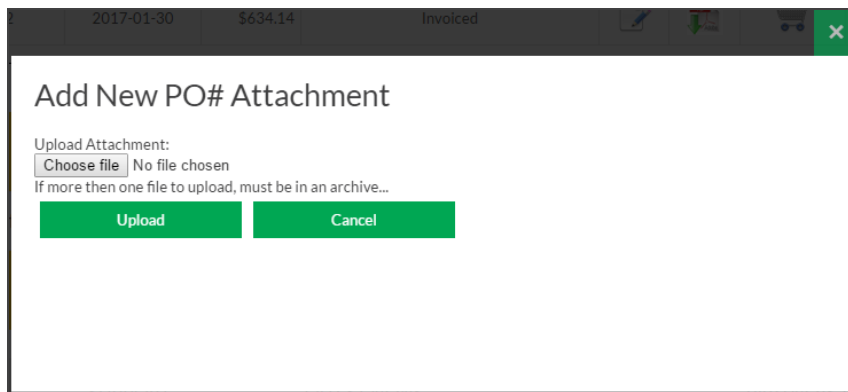
Got a Question?

We are here to help!
📞 1.844.634.6348 ext 1
✉ sales@finditez.com

💬 CHAT

4. To download the order in PDF format, click on the **PDF** icon.

     a. The order will open as a PDF in a new browser window.

     b. Download or print the document as desired.

5. To upload an electronic copy for an order where the payment method selected was by **Purchase Order**, click on the Add button under the **PO** column.

a. Use the Choose file button to select the Purchase Order document from your system.

b. Click on the Upload button to save a copy of the file.

Create a New Order
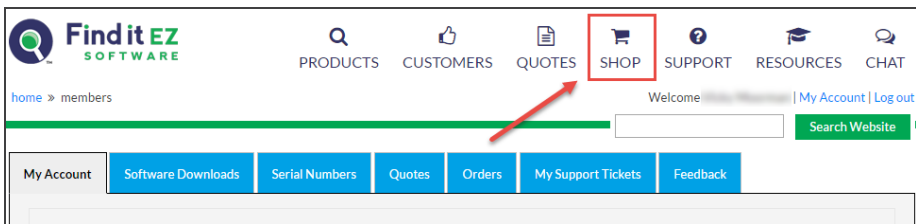
1. Visit **https://www.finditez.com/**. From the menu at the top, select **Shop**.

   OR

2. Log in to your Find it EZ Member Account.

   a. Select the **Orders** tab.
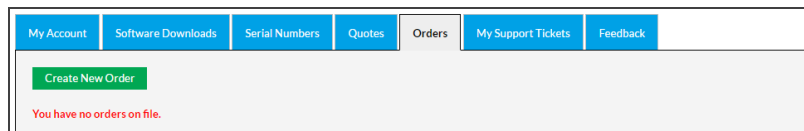
b. Click on the Create New Order button. The **Products Catalog** will appear.

3. Locate the product(s) you want to add to your order.

4. To select a product, click on the corresponding Add to Cart button. Go to step 6.

OR

5. To select product options, click on the corresponding Select Options button.

a. Review product information (bottom left) by clicking on the desired "+" to expand.

b. Enter the desired **Quantity**.

c. Choose the desired **Software Assurance** plan.

d. Click on the Add to Cart button.

6. To add more items, click on the + Add More Items button. The **Products Catalog** will appear (see above).

7. To edit or delete an item, click on the corresponding icon located to the right of each item.

    a.   Make changes to the **Quantity** or **Software Assurance** selection, as desired.

    b.   To save your changes, click on the blue **Update** link.

8.   Where applicable, enter a **Discount Code** and click on the Apply Coupon button.

9.   To save the order as a quote, click on the Save as quote button.

10. To pay for the order, click on the Checkout button.

Pay for an Order

1.   Log in to your Find it EZ Member Account.

2.   Click on the **Orders** tab. A table will appear showing the **Order #**, **Expiry Date**, **Amount**, and **Status**. Locate the order for which you want to pay.

3.   In the **Pay Now** column, click on the corresponding shopping cart icon. The **Checkout** dialog box will appear.

4. Select the **Billing Address** and **Shipping Address**, then click on the Save and Continue button.

Checkout

Step 1 - Account details => **Step 2 - Confirm order** => Step 3 - Select Payment Method

Bill To Address	Ship To Address
My Business 1234 Happy Street SE Calgary, AB T2C 3J9 CA	My Business 1234 Happy Street SE Calgary, AB T2C 3J9 CA

Currency: [CAD]

*conversion rate from USD @ 1.3044

Your Quote contains: 1 items

Product	Unit Price (CAD)	Quantity	Total
Code Search Pro - Desktop - Single Named User	$481.32	1	$481.32
▶ *Save 5% - 2 years support & upgrades*	$122.61	1	$122.61

Sub Total:	$603.93
Taxes based on	
*Ship to Province:	
Alberta ▼	
GST @ 5% on $603.93	$30.20
Grand Total:	$634.13

Who should we send the invoice or reciept to?

◉ Send the invoice or receipt just to me

○ Send a copy of the invoice or receipt to this person too:

Accounts Payable Contact

☐ ~~info@barketechnet.us Vicky Meerman~~

☐ ~~vicky.meerman@nit.us Vicky Test Meerman~~

Add New Contact

Who should we send the activation serial numbers to?

◉ Send them just to me

○ Send them to these people(s) too:

End User Contacts

▽ Filter By Name or Email   [Apply]

☐ ~~info@barketechnet.us Vicky Meerman~~

☐ ~~vicky.meerman@nitn.net Vicky Test Meerman~~

☐ ~~vicky.meerman@nitn.us Vicky Test Meerman~~

Add New Contact

[Save and Continue]

5. Review and confirm the order, then click on the Save and Continue button.

6. Select and enter the method of payment.

> **Note:** Payment by secure credit card or Paypal will immediately release full activation keys. Selecting payment by Check, Invoice Me, Wire Transfer or Purchase Order will issue a net 30 day terms invoice.

> **Note:** When paying by Purchase Order, you may upload an electronic copy of the purchase order document or email a copy to **billing@finditez.com** referencing your order # in the email subject or body.

7. Click on the Process Payment button.

My Support Tickets

The **My Support Tickets** tab on the member website allows you to create, attach a file to, send, and view your support tickets.

Create a Support Ticket

A support ticket is used to report a program bug or to request a new product feature. Submitted crash reports or on-start-up of the program after a crash also create support tickets automatically. Support tickets status along with fix notes are visible to all linked accounts that are registered with the same e-mail domain.

From the program:

1. From the Find it EZ menu, select **Help -> Report a Bug** .
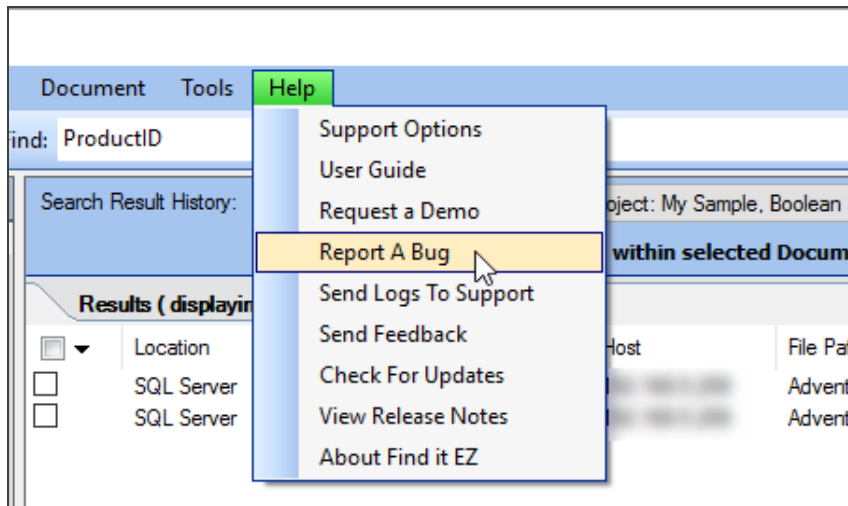
The **Report a Bug** dialog will appear. See example below:

> **Note:** The **Name** and **Email Address** fields will be filled out for you according to the current user. These can be changed, as desired.

2. Fill in the form:

   a. In the **Summary** text box, enter a brief but descriptive summary of the issue.

   b. In the **Description** text box, enter a detailed description of the issue or request. For bugs, include detailed steps required to reproduce the issue.

   > **Tip:** To send logs to Find it EZ Support, **See**"Find it EZ Support" on page 261.

3. Click on the Submit Bug button. Once submitted, the following notification will appear:

On the website:

1. Log in to your Find it EZ Member Account.

2. Click on the **My Support Tickets** tab.

3. Click on the Create a Support Ticket button. A **Ticket System** dialog box will appear.

4. In the **Product Information** section:

    a. Select the affected product name from the **Product** drop-down list.

    b. Select the affected version from the **Version Found** drop-down list.

5. In the **Problem Description** section:

    a. Select the appropriate issue severity from the **Severity** drop-down list. Refer to the image below:

    > Critical: The software crashes, hangs or causes you to loose data
    > Setup: A data conversion, personal computer configuration or installation issue
    > Support: Request for technical assistance or 'how do I?' training request
    > Normal: It's a bug that should be fixed
    > Minor: Loss of function, but there is an easy workaround
    > Trivial: A cosmetic problem, such as a misspelled word or misaligned text
    > Enhancement or Change: Request for a new feature, better performance, or functional changes
    > Feedback: Product reviews or contest entries

    b. In the **Summary** text box, enter a brief and descriptive summary of the issue or problem.

    c. In the **Description** text box, enter a detailed description of the issue or problem.

    d. In the **Steps to Reproduce** text box, thoroughly describe the steps required to reproduce the issue or problem. Include as much detail as possible.

    > **Note:** This (d. above) is optional, but very useful information for expediting problem resolution.

6. To attach a file to the support ticket:

    a. Click on the Choose File button.

    b. Navigate to the file you want to attach.

    c. Click on the Open button. The file name will appear in the **File Attachment** section to the right of the Choose File button.

7. To send the support ticket to Find it EZ support, click on the Send Report button.

View My Support Tickets

1. Log in to your Find it EZ Member Account.

2. Click on the **My Support Tickets** tab. A list of your submitted support tickets will appear showing the **Issue #**, **Reported** date/time, **Status**, **Last Updated** date/time, and **Summary**.

> **Note:** It may take up to 24 hours for new issues to appear in this list.

3. Click on a ticket number to view more details for an individual item. See example below:

Send Feedback

There are several ways to provide feedback to Find it EZ Software Corp.. via convenient online forms. Follow these steps:

1. ***From the program:***

   a. From the Find it EZ menu, select `Help -> Send Feedback`. You will be directed to the Find it EZ website and be required to log in.

   b. To log in to the Find it EZ member site, enter your account e-mail address and password and click on the `Login` button or press the (**Enter**) key on your keyboard. The member site will appear with the **Feedback** tab selected.

   OR

On the website:

1. Log in to your Find it EZ Member Account.

2. Click on the **Feedback** tab.

3. Choose from three options available:

   a. **Option 1:** If a commendation is provided using this form, it will be reviewed and may be posted as a testimonial on our website:

      i. Enter or confirm your company and/or personal information directly on the **Feedback** form.

      > **Note:** Items with dots are required. Abbreviations can be used for anonymity.

      ii. Enter your feedback into the **Comments** text box (max. 250 characters).

      iii. If more space is needed, enter more feedback into the **More Space Needed?** text box.

      iv. Click on the Send Feedback button. A confirmation message will appear to confirm your feedback has been sent.

b. **Option 2:** A simplified single comment note that we be reviewed and posted on our customer listing with your permission:

    i. Click on the Benefits to My Company button.

    ii. Provide your comments and click on the Save button.

c. **Option 3:** Take a brief customer satisfaction survey:

i. Click on the `Take a Quick Survey` button.

ii. Complete the short, one-page **Customer Satisfaction Survey** form.

Customer Survey Questionnaire

Find it EZ
SOFTWARE

Please note: Your responses are aggregated and anonymous. They will be kept strictly confidential for internal use only.

1. On a scale of 1-5, please rate your experience with Find it EZ.

	Poor	Fair	Good	Very Good	Excellent
The Product	○	○	○	○	○
Service and Support	○	○	○	○	○
The Website	○	○	○	○	○

2. What is the most important reason or need that has influenced your choice to purchase or use Find it EZ over any other option available?

3. What would you estimate to be your ROI based on time and money saved using Find it EZ? It can pay for itself:

○ within one (1) day

○ within one (1) week

○ within one (1) month

○ within six (6) months

○ not determined yet

4. Would you recommend Find it EZ to a colleague?

○ Yes

○ No

5. Thank you for your interest and taking the time to respond. Any additional comments or suggestions?

6. If you would like us to follow-up with a response, please provide us with your name and email address or phone number:

Name	
Email	
Phone	

Done

License Agreements and Statements

Visit **https://www.finditez.com/support/documents/eula.pdf** to view the Find it EZ Software Corp. Software License Agreement.

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