Find it EZ Software Corp.

CodeSearch™ PRO desktop

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About This Guide

This user guide is intended to supplement Find it EZ website 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 and suggestions to **support@finditez.com**

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

This guide uses the following document conventions:

Program windows or dialog box titles are shown in bold text like this: **Bold Title**

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

Program buttons are shown like this: **Cancel**

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

Program labels, radial buttons and drop down list options are shown in mixed case bold mono-type text like this: **`Labels`**

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).

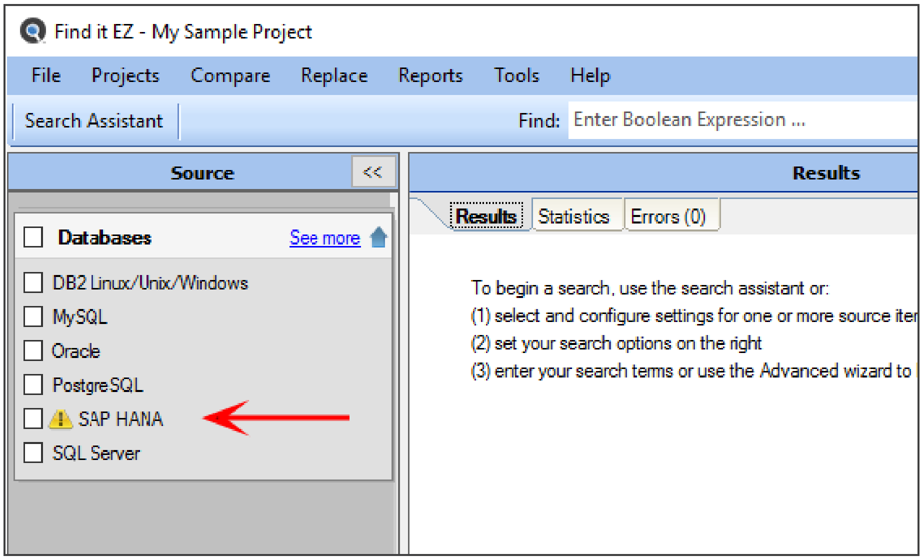
See Also:

- "My Account" on page 229

Download Connectors

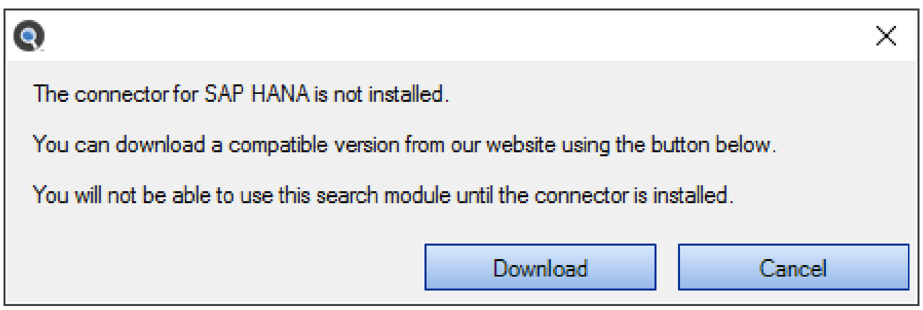
Source items that require a connector will appear with a small warning icon preceding the name. See example below:

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.

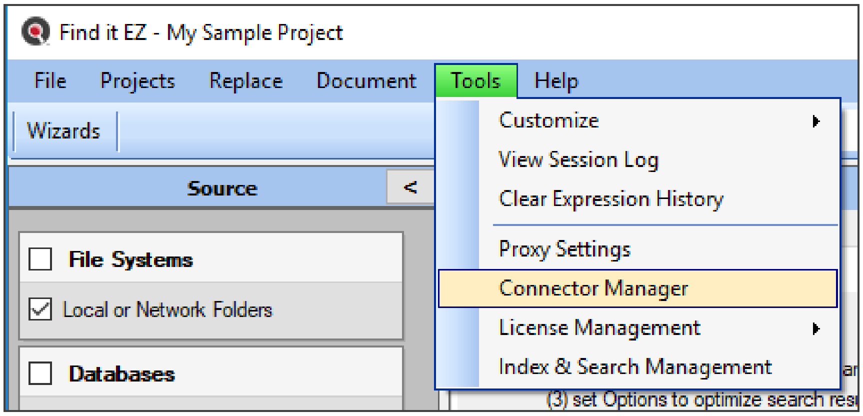
If you try to initiate a search that includes a selected source lacking a required connector, an error message will be generated. See example below:



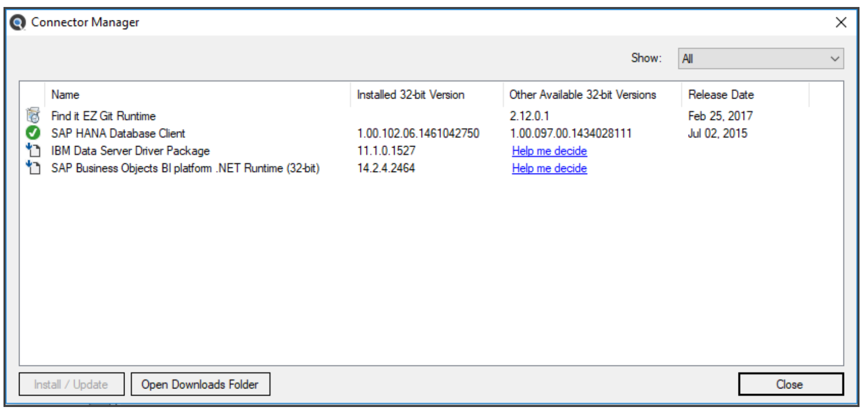
From the Program:

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

1. From the Find it EZ menu, select ***Tools -> Connector Manager*** .



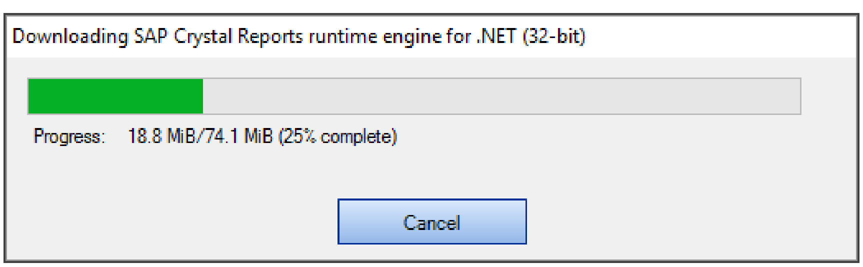
A **Connector Manager** dialog will appear.



2. Optionally select one of the `Show` drop down options to filter the list. For example, selecting the option `Missing` will display a list of required connectors that have not yet been installed based on the source items you have configured using the **Configuration Wizard**.

> **Note:** Items with a check-mark icon next to them indicate you have the minimum or newer connector version detected as already installed on your system.

3. Click on any one of the items with an install icon then click the **Install / Update** button. The connector will begin downloading.



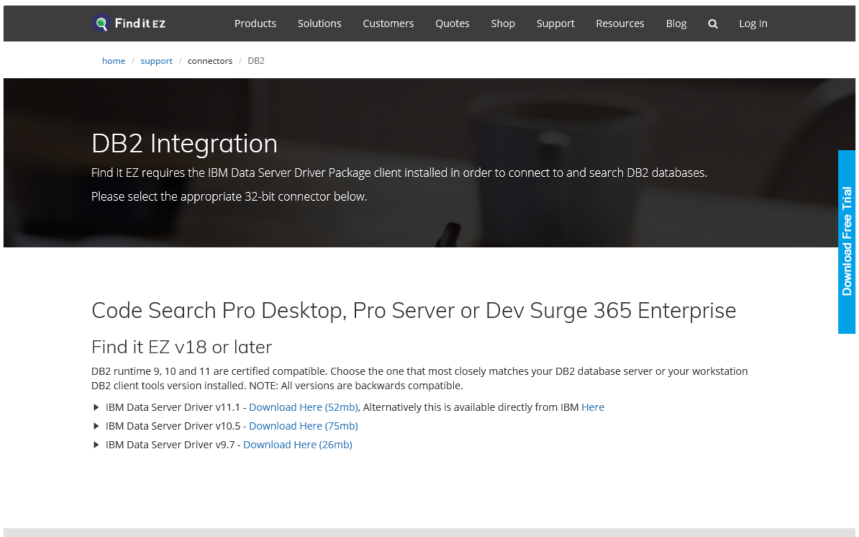
a. Once downloaded, a Find it EZ **InstallShield Wizard** will appear.

b. Click on the **Next** button.

c. Read and follow the instructions provided.

d. When complete, click on the **Finish** button.

4. OR, click on any one of the items with a download compatible version icon , then click the **Help me decide** button or hyperlink for that item. This will launch your browser and open a page on the Find it EZ Software Corp. website to help you select the correct version of the connector based on other related software installed on your workstation. For example, clicking on the "IBM Data Server Driver Package" for the required DB2 connector will take you to this page, see below:



5. Follow the instructions on the website page to select, then download and chose to either save or run the corresponding setup package depending on your browser and network security permissions.

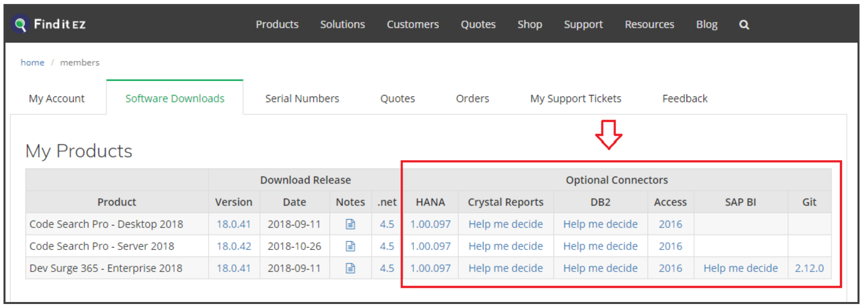
> **Note:** If you chose to save the setup package to your local system, you will then need to locate and run it with administrative rights once the download completes successfully.

> **Tip:** The **Open Downloads Folder** button will contain all downloaded Find it EZ setup packages within this default path: C:\ProgramData\Bits n Bytes Software Inc\Installers . To keep all related downloads organized for re-use, it is recommended that you save these "version compatible" connector setup packages to this specific folder location as well.

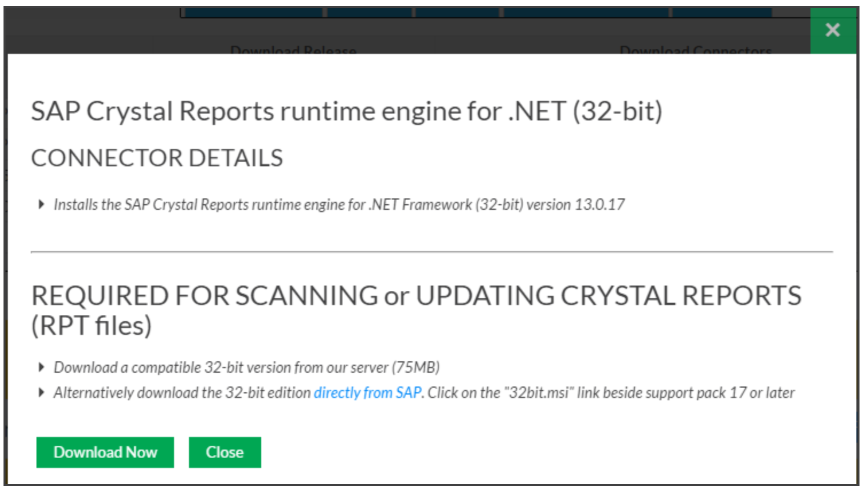
On the Website:

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

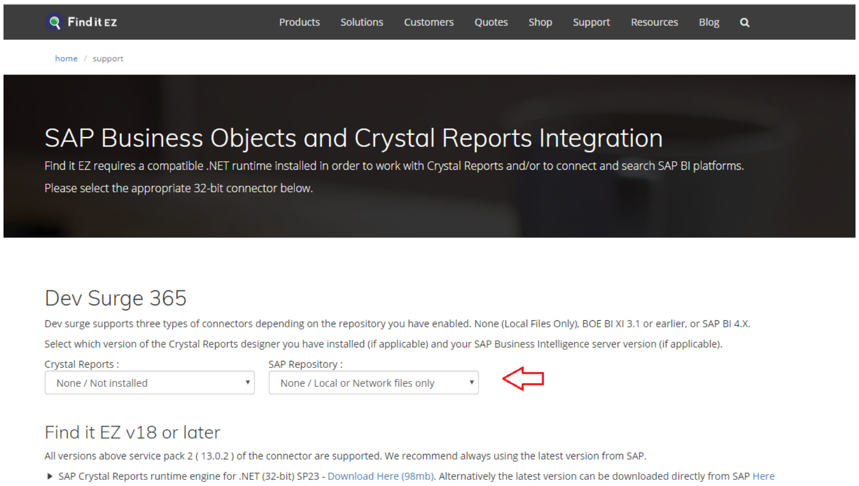
2. Click to select the **Software Downloads** tab. A list of product releases and optional connectors will appear.



3. Locate the product release for which you want to download a connector.
4. In the **Optional Connectors** section of the table, click on the corresponding hyperlink in the desired connector column. For all hyperlinks that <u>do not</u> contain the text **`Help me decide`**, 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.
9. OR, in the **Optional Connectors** section of the table, if you chose any connector with the hyperlink text **`Help me decide`**, a website page will display with instructions to guide you through selecting a compatible version depending on related software that may be installed on your workstation or network environment. See example below:



10. Follow the instructions on the web page to filter the recommended compatible version of the connector to be installed.
11. Once the recommended connector download link is displayed, click to download and chose to either save or run the corresponding setup package depending on your browser and network security permissions.

    Note: If you chose to save the setup package to your local system, you will then need to locate and run it with administrative rights once the download completes successfully.

See Also:

- "Check for Updates" on page 25
- "Download Release Version" on page 240
- "Download .NET Framework" on page 246

View or Edit Proxy Settings

If your corporate network uses a proxy server firewall to manage all incoming and outgoing (Internet) traffic, 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.

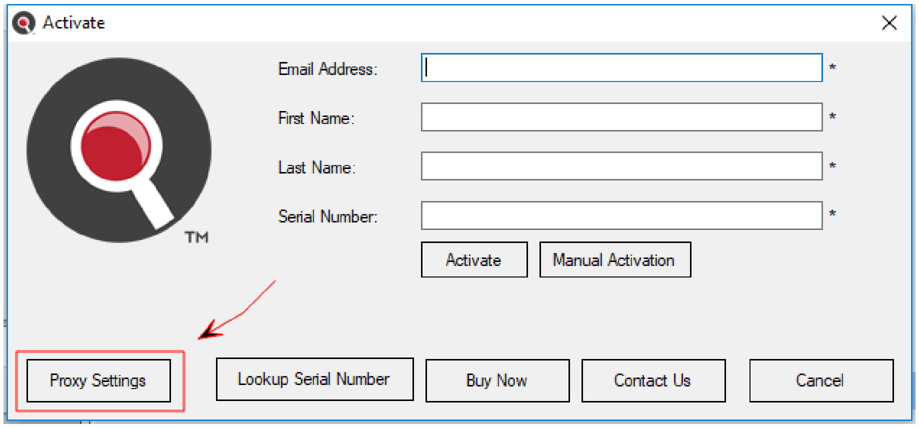
Note: The proxy server itself will also need to be configured to permit inbound / outbound traffic over secure port 443 to the following two Find it EZ Software Corp. website addresses:

- activation.finditez.net (for update checks and automated product activation)
- cdn.finditez.com (for integrated product and connector setup file downloads)

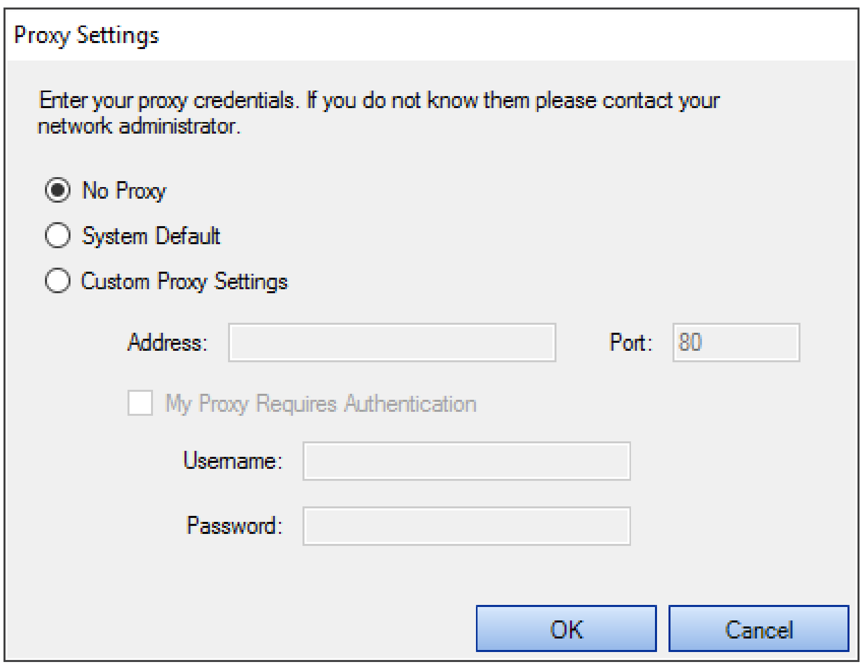
Please contact your Network Administrator to ensure these website address' are white-listed in your proxy server.

There are three ways you can enter proxy settings. In all cases, the settings are saved between sessions. Note that saved passwords, if required for your proxy, are automatically encrypted for security.

From the Program Activation Dialog Window:



1. Before clicking on the **Activate** button, check your Proxy Settings.
2. Click on the **Proxy Settings** button. The **Proxy Settings** dialog box will appear.

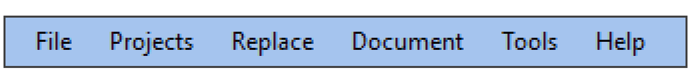


3. Choose `System Default` and/or enter `Custom Proxy Settings`, as required for your network.

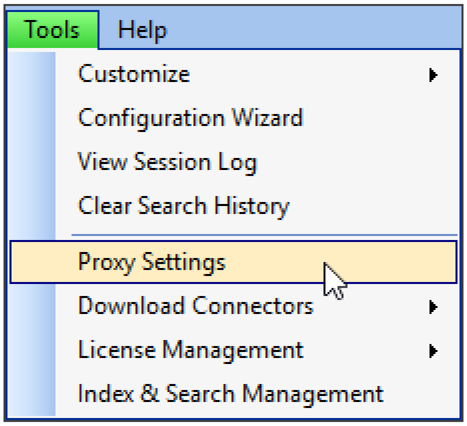
Note: If you don't know your proxy settings, please contact your Network Administrator.

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

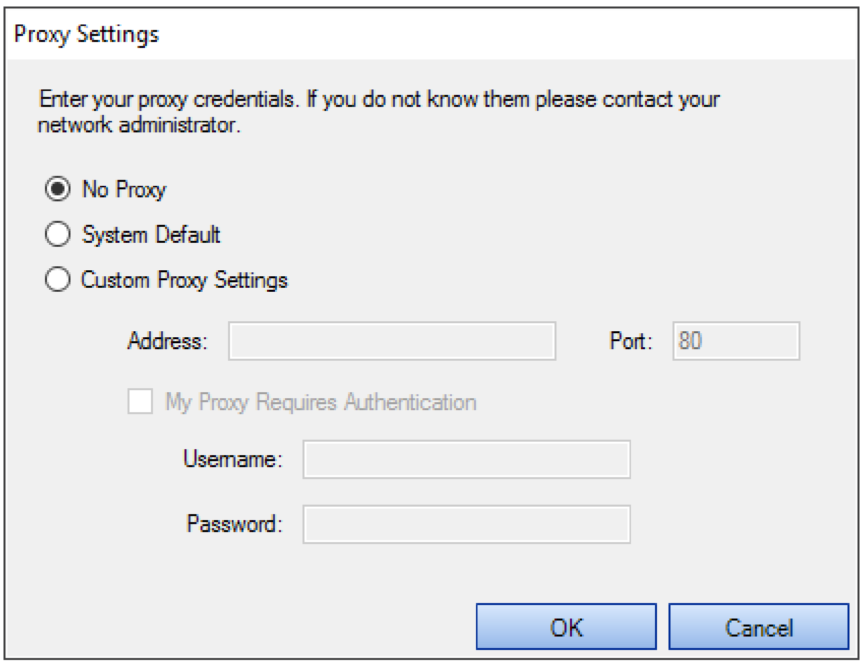
From the Program Main Menu:



1. Select ***Tools -> Proxy Settings***.



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

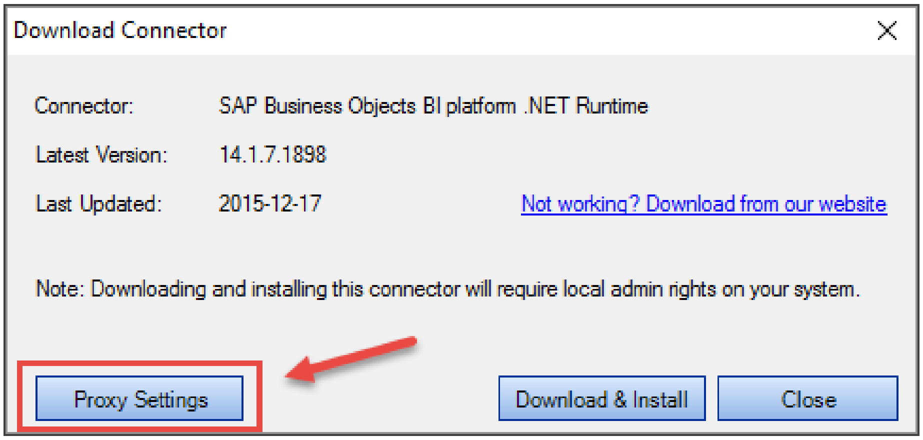


2. Choose `System Default` and/or enter `Custom Proxy Settings`, as required for your network.

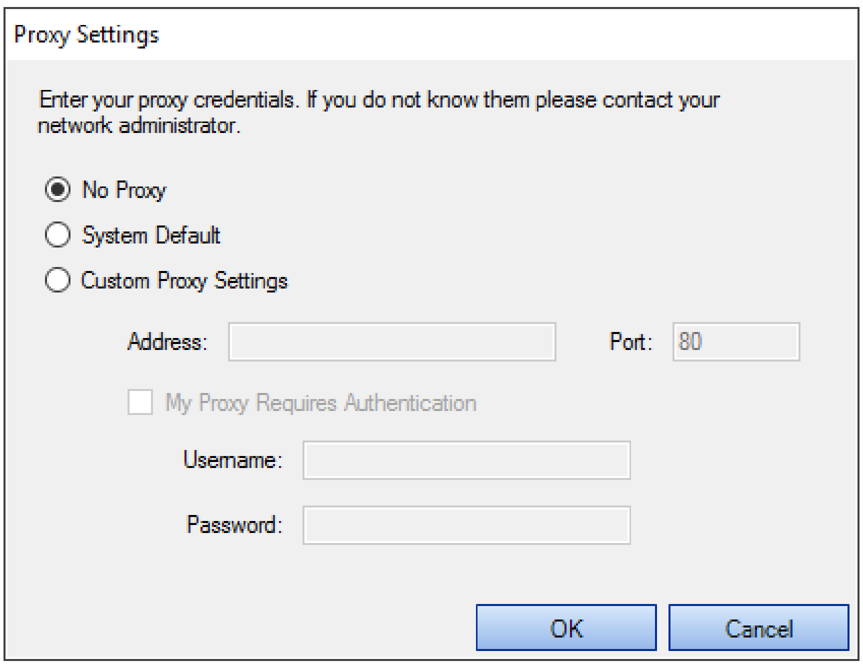
> **Note:** If you don't know your proxy settings, please contact your Network Administrator.

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

From any Download Dialog Window:



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.



3. Choose `System Default` and/or enter `Custom Proxy Settings`, as required for your network.

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

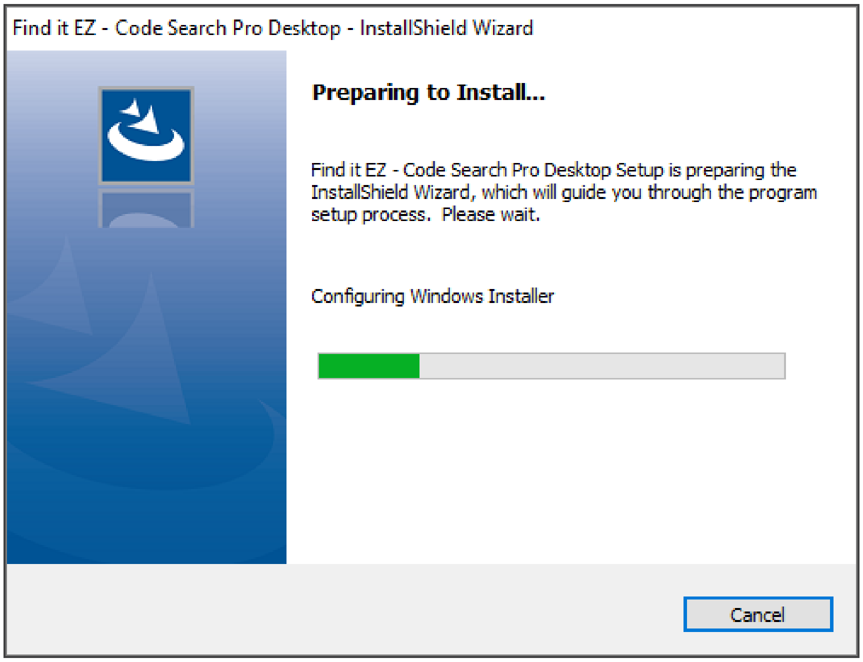
4. To save your changes and close the **Proxy Settings** dialog box, click on the **OK** button.

Installation and Configuration Wizard

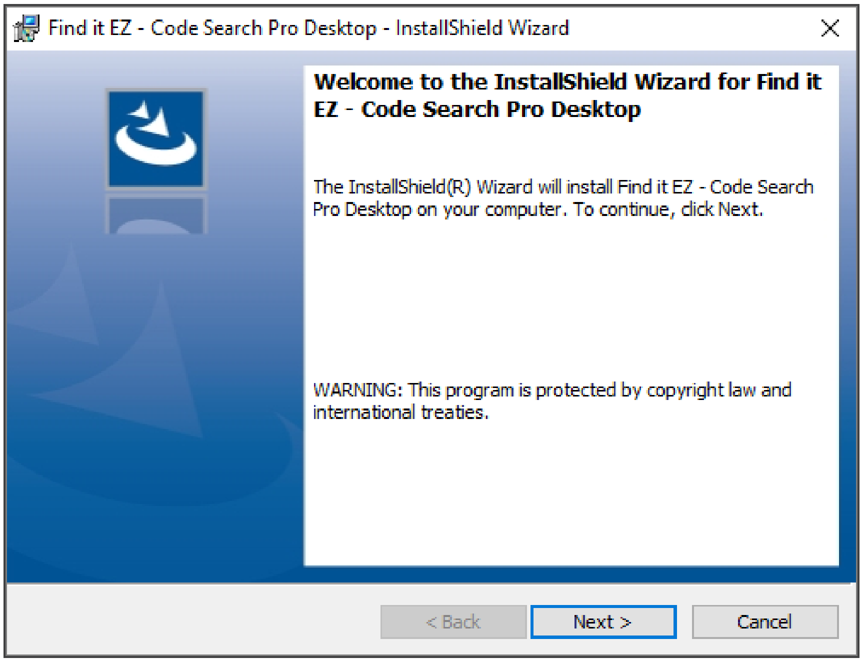
Install Code Search Pro Desktop

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:

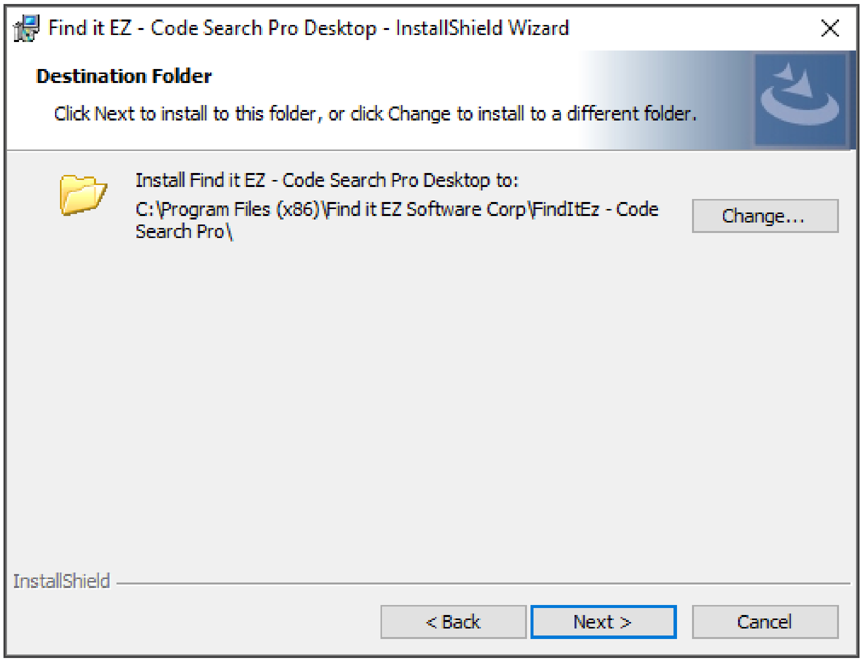


Once the preparation is complete, the following dialog will appear:

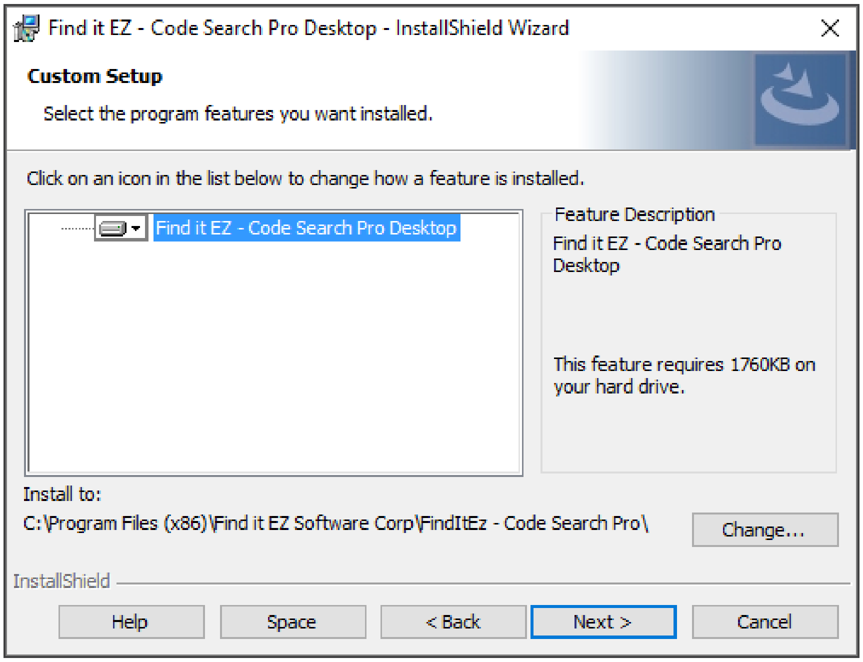


2. Click on the **Next** button to continue. The **License Agreement** dialog will appear, as below:

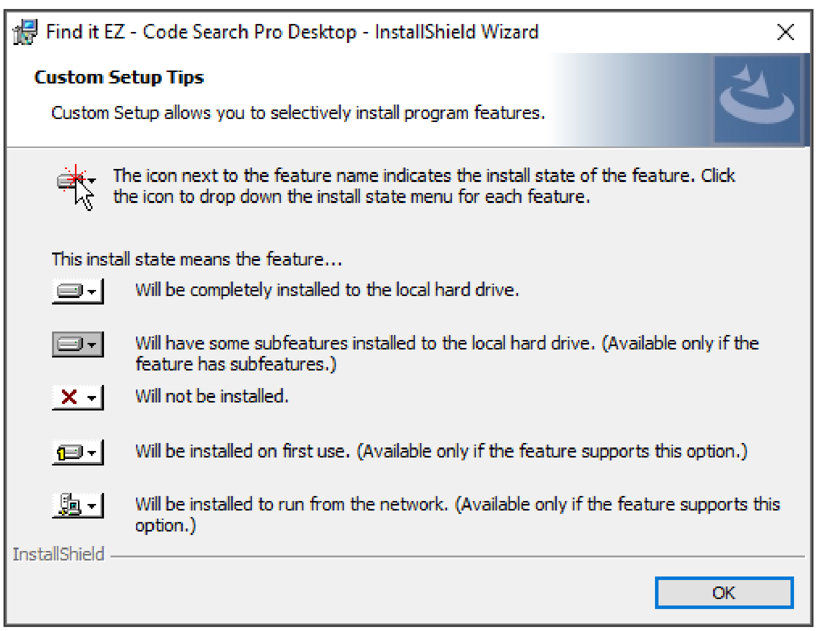
3. Read and accept the license agreement as follows:
   a. Use the vertical scroll bar to read the license agreement carefully and thoroughly.
   b. To print the license agreement, click on the **Print** button. A **Print** dialog will appear. Configure print settings as desired and click on the **Print** 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:

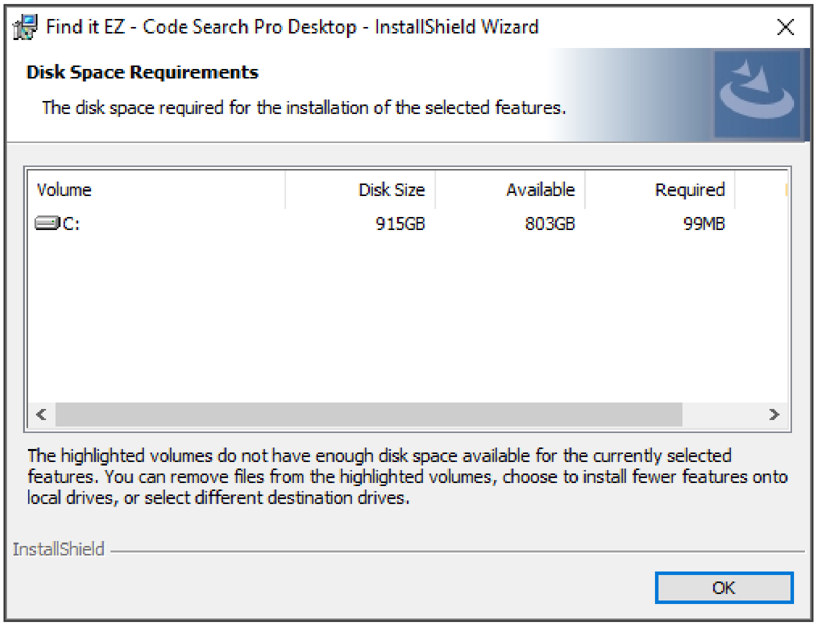


a. To change how a feature is installed or to exclude a feature, click on the icon preceding the feature name and select the desired option from the context menu. For more information, click on the **Help** button. See below:



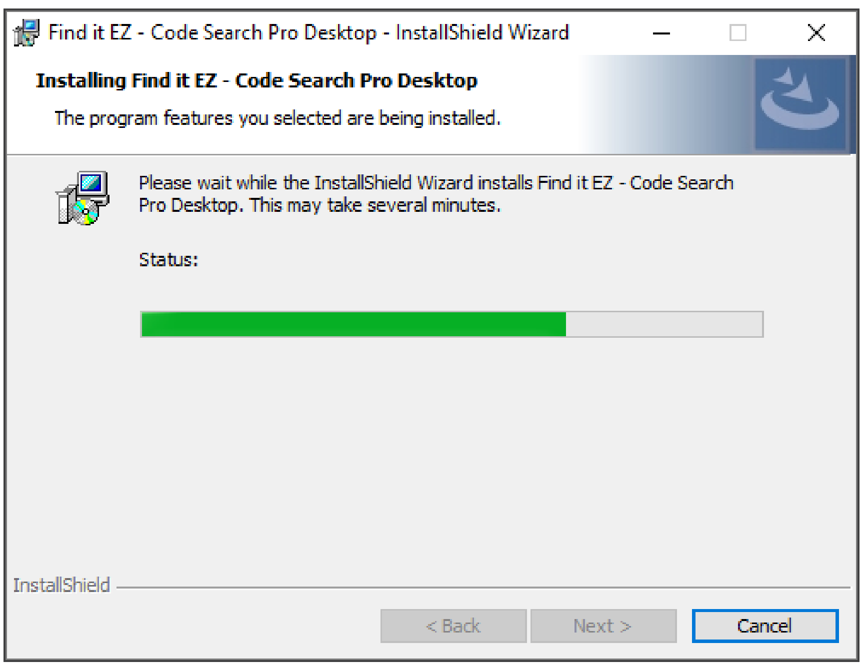
b. To close the **Custom Setup Tips** dialog, click on the **OK** button.

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

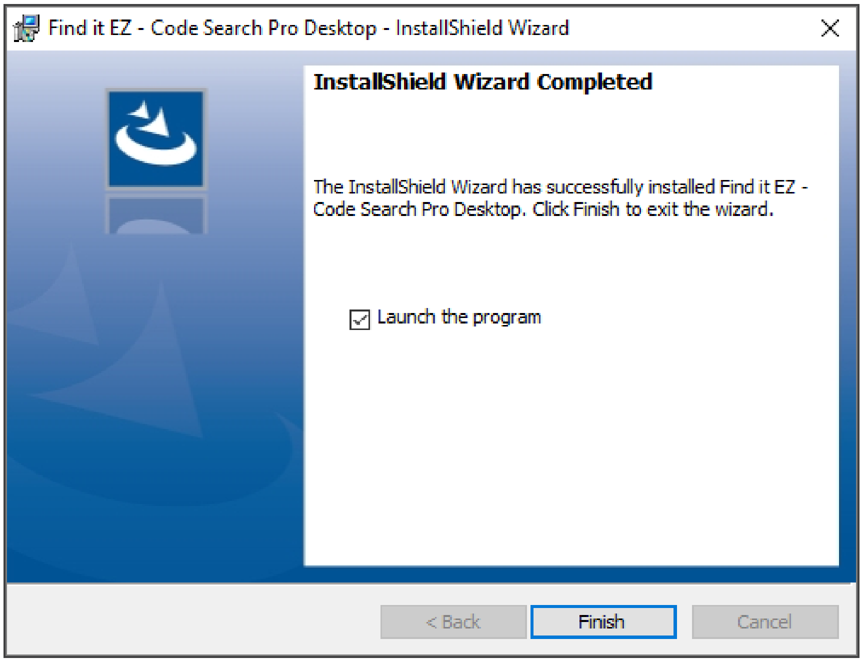


d. To close the **Disk Space Requirements** dialog, click on the **OK** button.

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:

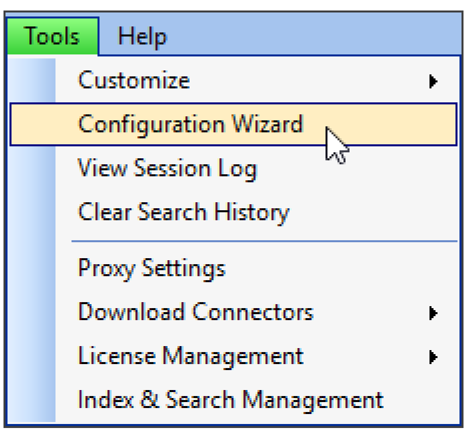


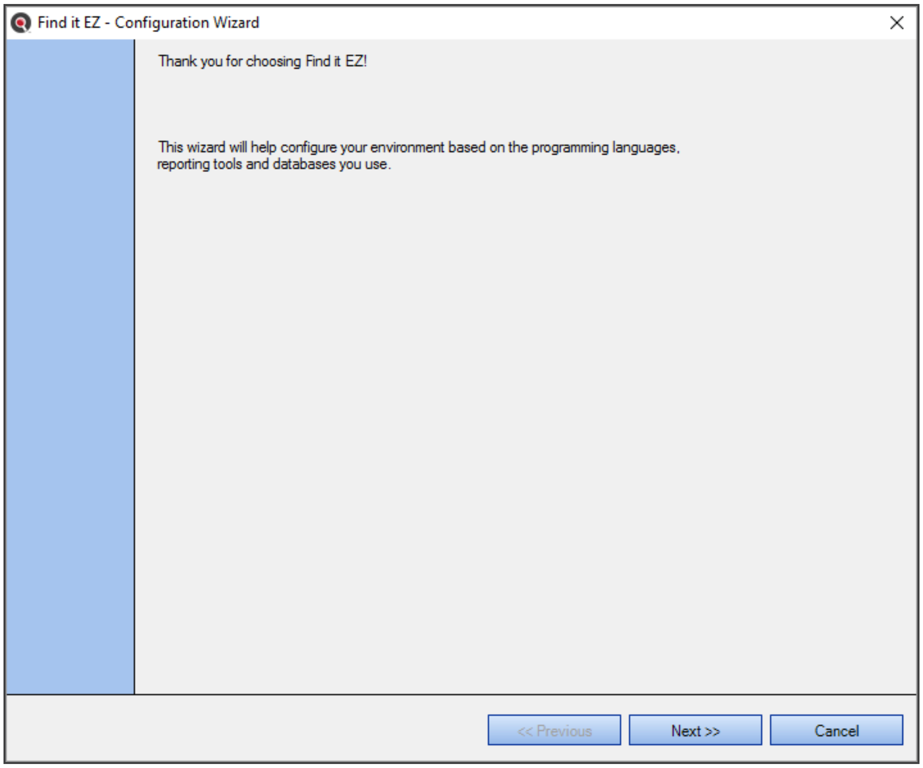
To launch the program after installation, click to select **Launch the program** (selected by default).

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 59
- "License Manager" below

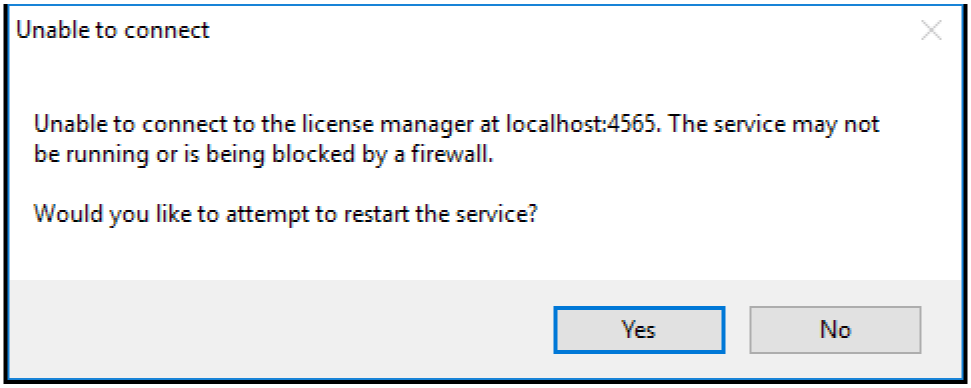
License Manager

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.

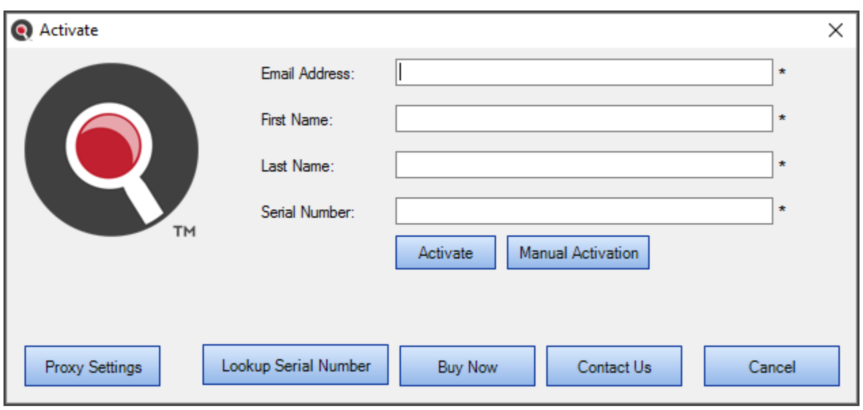
See Also:

- "Serial Numbers" on page 252
- "Installation and Configuration Wizard" on page 12

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:

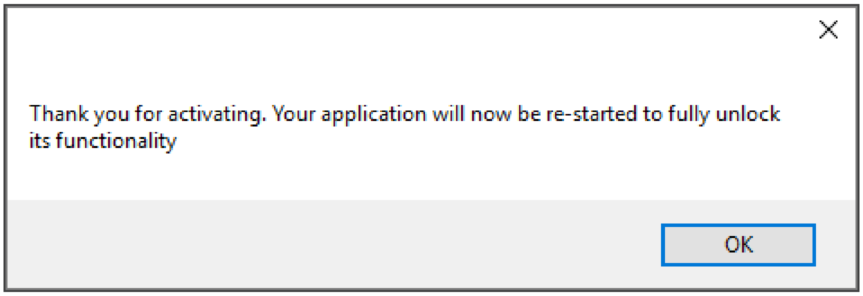


2. Enter your account **Email Address**, **First/Last Name**, and product **Serial Number**.

> **Note:** If access to the Internet is protected by a proxy firewall within your network, click on the **Proxy Settings** button and enter the required credentials before clicking the **Activate** button. For more information, see "View or Edit Proxy Settings" on page 8

> **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.



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 254
- "View or Transfer Current License" on page 252
- "Download Find it EZ" on page 3
- "Download Release Version" on page 240
- "Get a New Trial License" on page 255
- "View or Edit Proxy Settings" on page 8

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. Our automated activation system is a web service on domain *activation.finditez.net*, on SSL port 443. A corporate security policy may prevent an application from attempting to "call out," or may not allow a connection to this specific secure domain address. However, they could often still use a web browser to go to our website on **www.finditez.com** as the most corporate internet use security policies typically allow normal internet access to trusted websites.

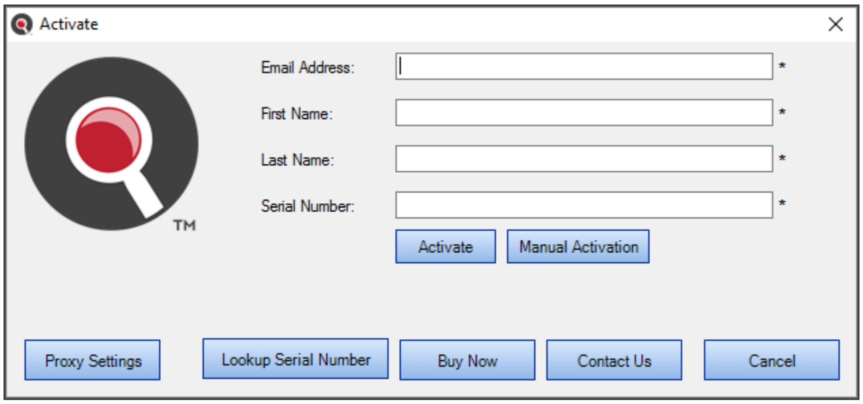
In cases where no Internet access is allowed even from a web browser, the end user would have to find a workstation (home computer other office computer that is permitted web browsing) from where they can perform the manual activation by sending the files back and forth between a computer with Internet access and the computer upon which the Find it EZ application is installed.

> **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.

From the Program:

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

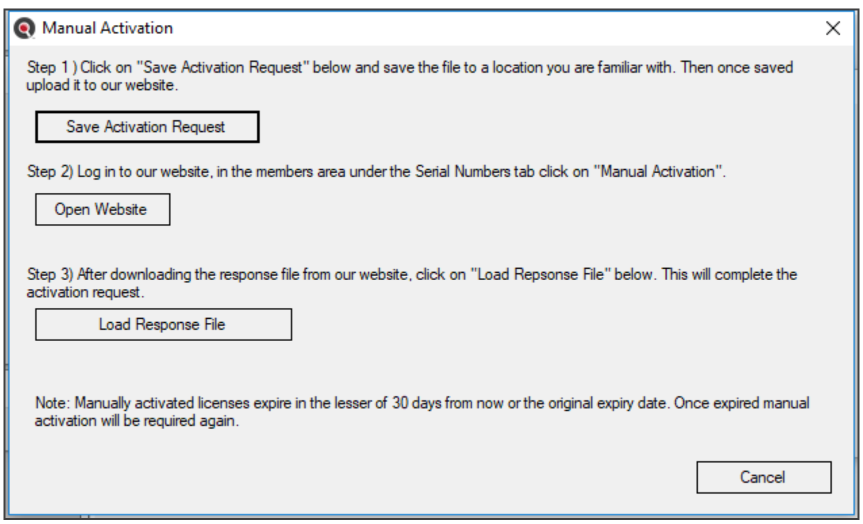
> **Note:** You can also access the **Activate** dialog box from the menu; select ***Tools -> License Management -> Enter New Serial Number*** .



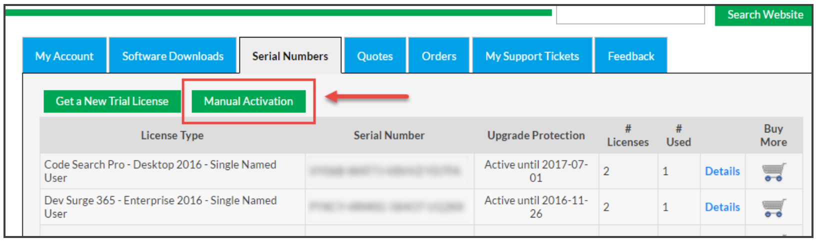
2. Enter your account **Email Address**, **First/Last Name**, and product **Serial Number**.

> **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.

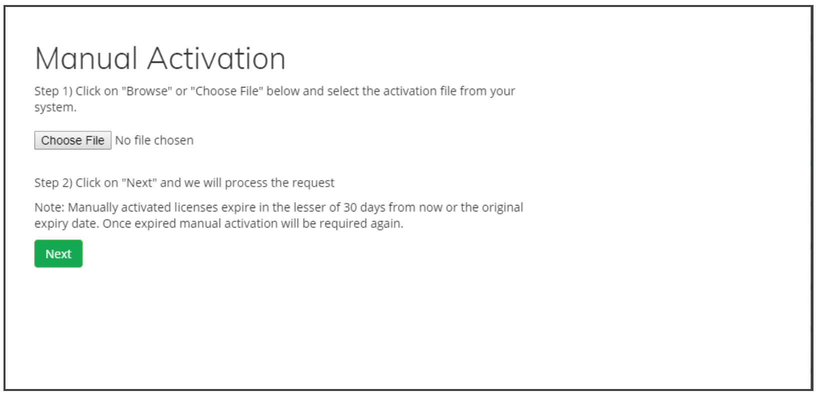
3. Click on the **Manual Activation** button. The **Manual Activation** dialog box will appear, as below:



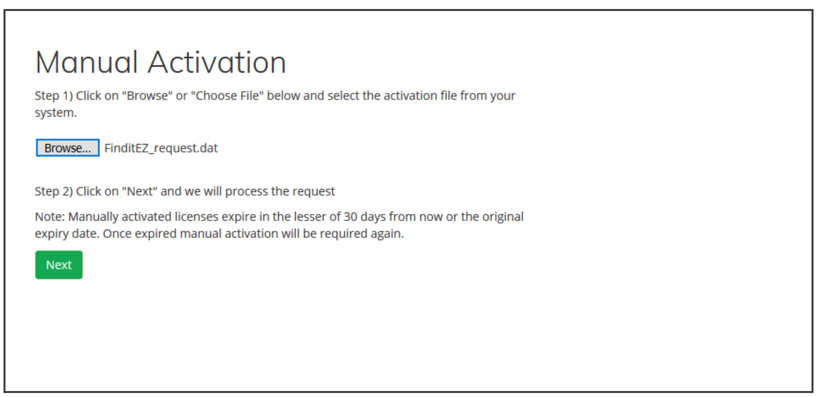
4. Follow the instructions in Step 1); to create an activation request file. Save it to a folder or location such as your desktop that you will be able to access for uploading this temporary file to our website.
5. In Step 2), click on the **Open Website** button to launch your default browser with our website log in page.
   a. Log in to the Find it EZ member website.
   b. Click on the **Serial Numbers** tab.



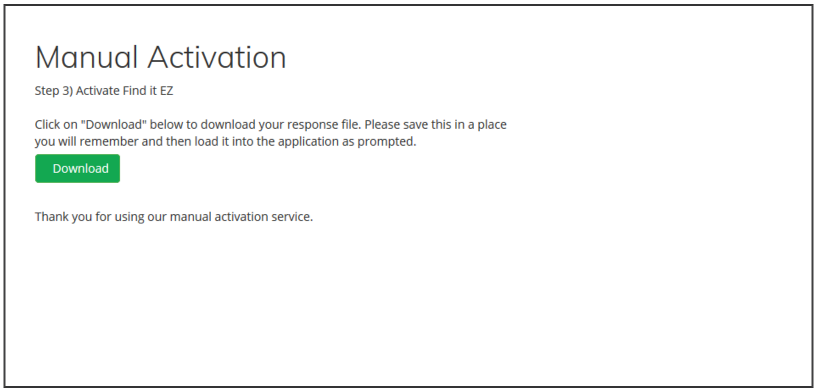
c. Click on the **Manual Activation** button. The **Manual Activation** dialog box will appear, as below:



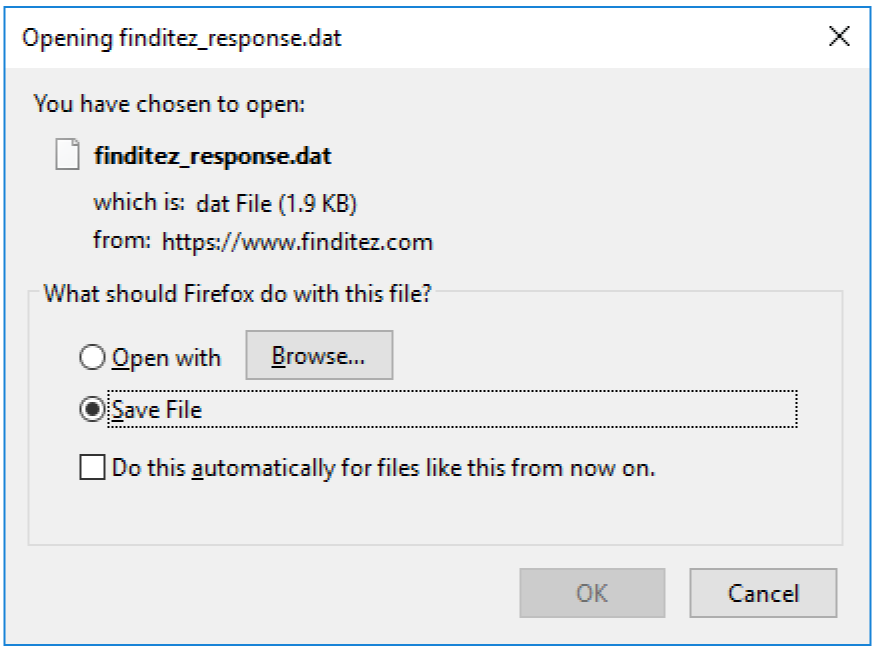
d. Click on the **Choose File** button to load the *FinditEZ_request.dat* file you saved it in step 4 above.



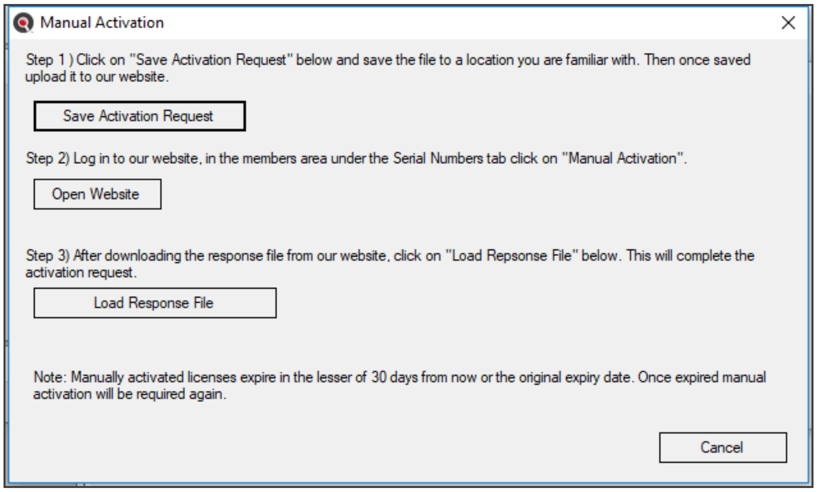
e. Click on the **Next** button. A response file will be generated. See example below:



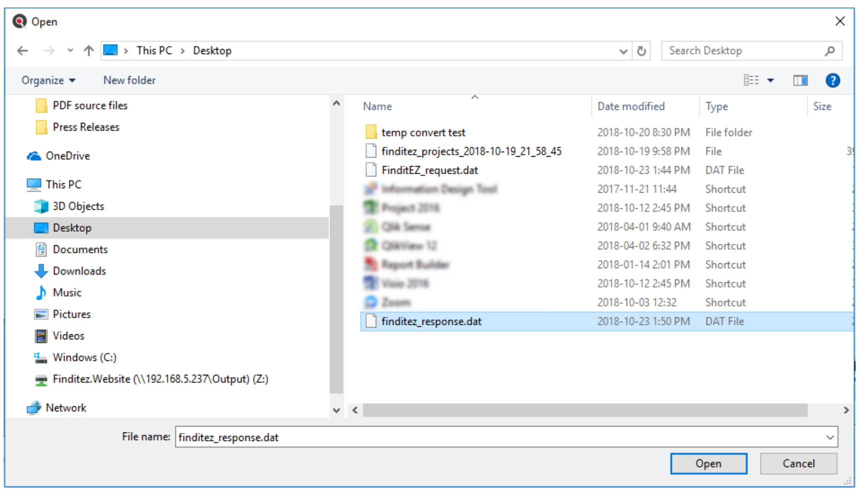
f. Click on the **Download** button to download and save the *finditez_response.dat* file.



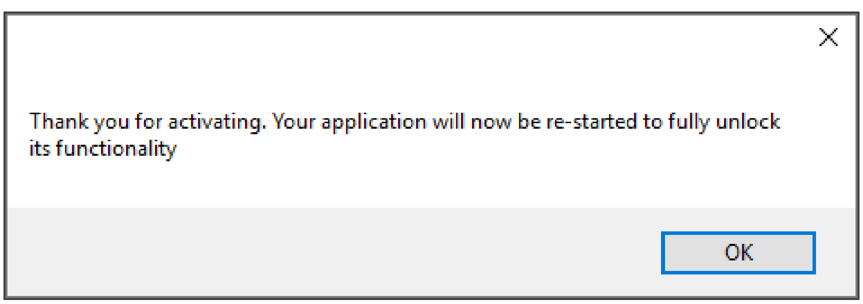
g. Return to the Find it EZ program.



6. Click on the **Load Response File** button to locate and select (click to highlight) the saved response file.



7. Click on the **Open** 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

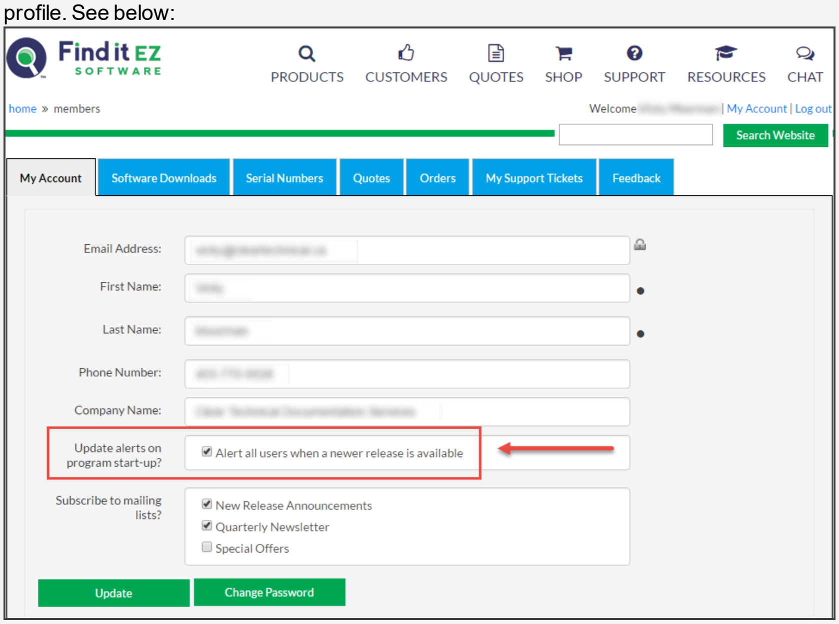
From the Program:

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

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

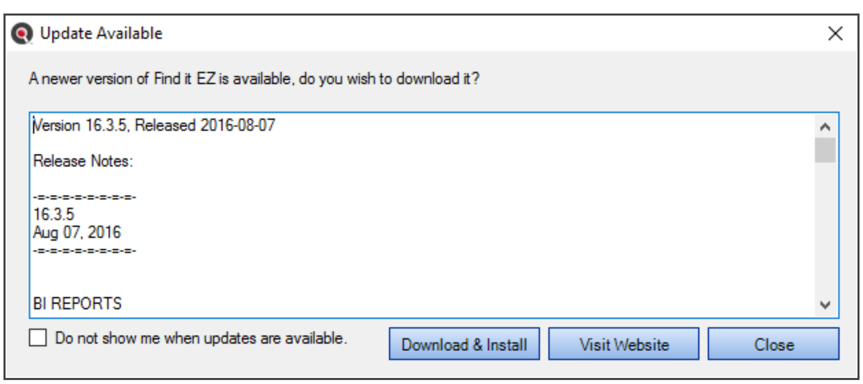
B. Your account profile is not set to skip the updates available check. Note, this setting may be used by and administrator to prevent all end-users from receiving this message and attempting to upgrade independently rather then by a more controlled corporate roll-out.

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:



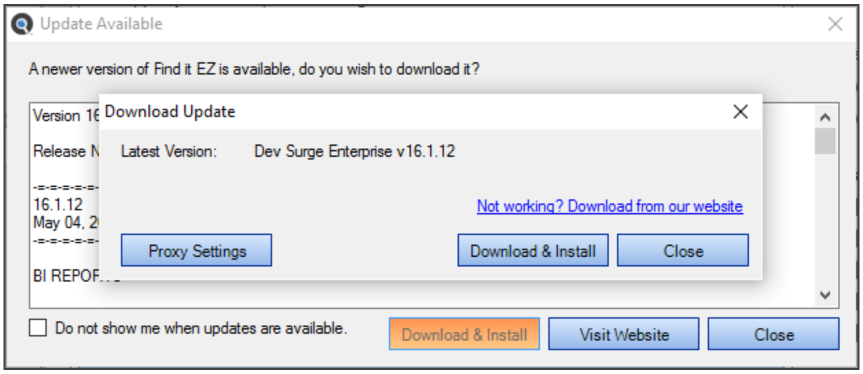
Alternatively, you may disable on start-up checks for your individual workstation by changing your custom profile using the ***Tools -> Customize -> User Options*** menu.

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** dialog 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** dialog will appear.



   a. To enter proxy settings, click on the **Proxy Settings** button.

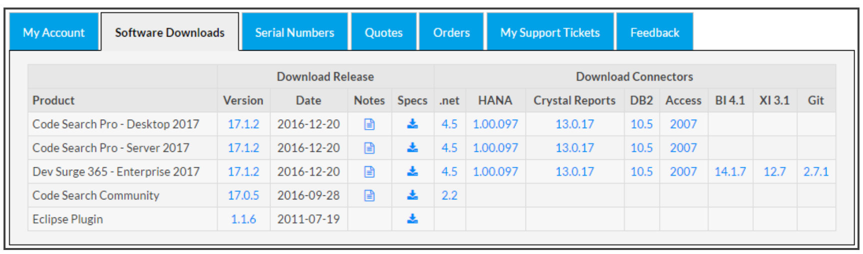
   b. To download and install the update, click on the **Download & Install** button. The download will begin.

      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.

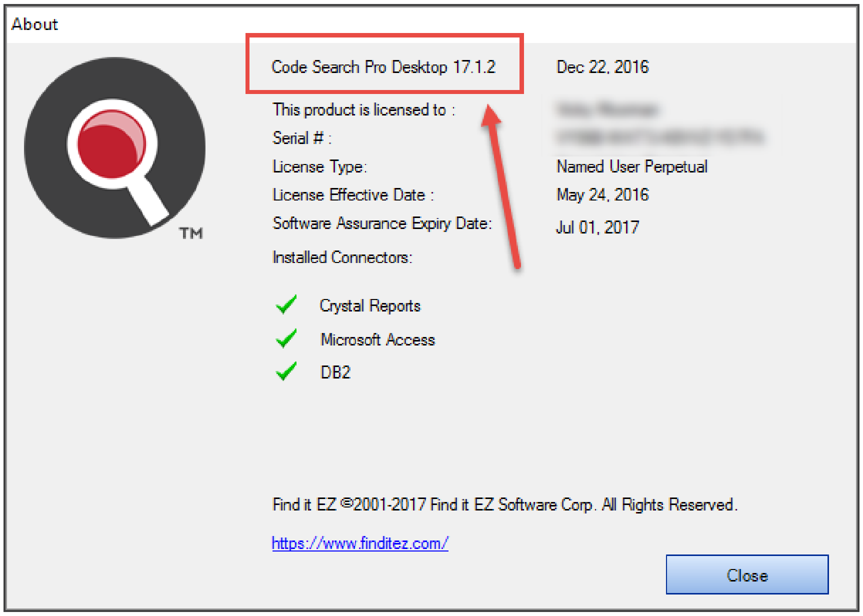
On the Website:

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



	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										

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.

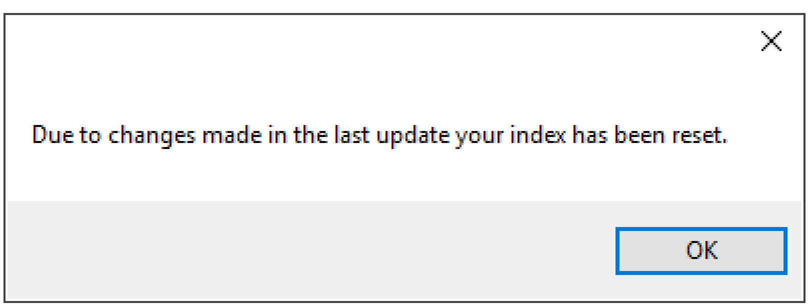
Note: You may disable automatic notifications by logging into your profile and changing your email notice preferences (as above), or by clicking on the “unsubscribe” hyperlink on any update notice received.

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.

Note: If your software assurance plan has lapsed, the latest version available to your for download would be posted under the "Older Versions" table, below the current product releases.

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.

See Also:

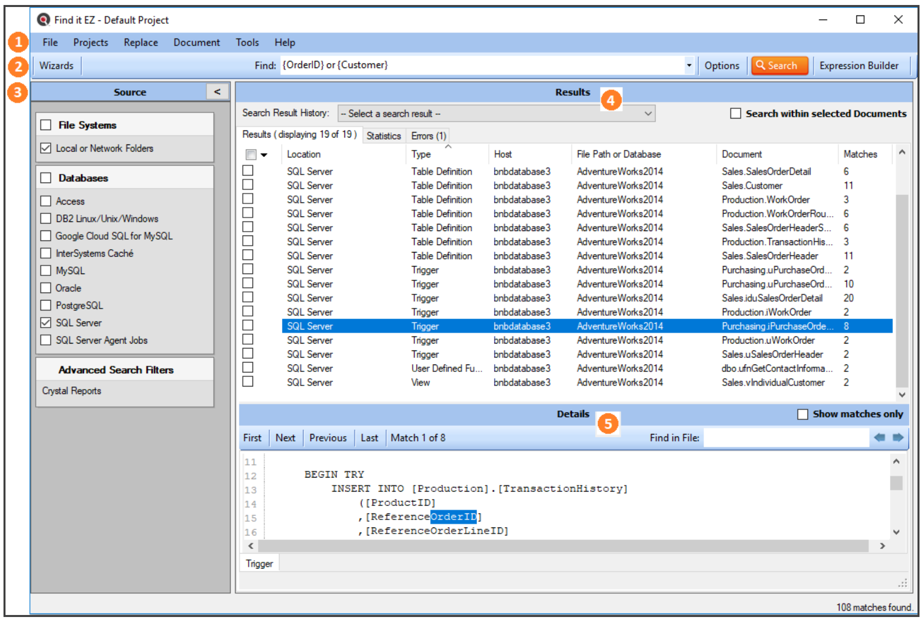
- "Download Release Version" on page 240
- "Download .NET Framework" on page 246
- "Download Connectors" on page 247
- "View or Edit Proxy Settings" on page 8

Product Overview

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

User Interface Layout

Refer to the image and table below for a description of the key components of the Find it EZ user 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	Results	Once a search is complete, results can be viewed or edited via this window. Select a tab to view **Results**, **Statistics**, and **Errors**.
5	Details	When a result is selected in the **Results** window, details will appear in this window.

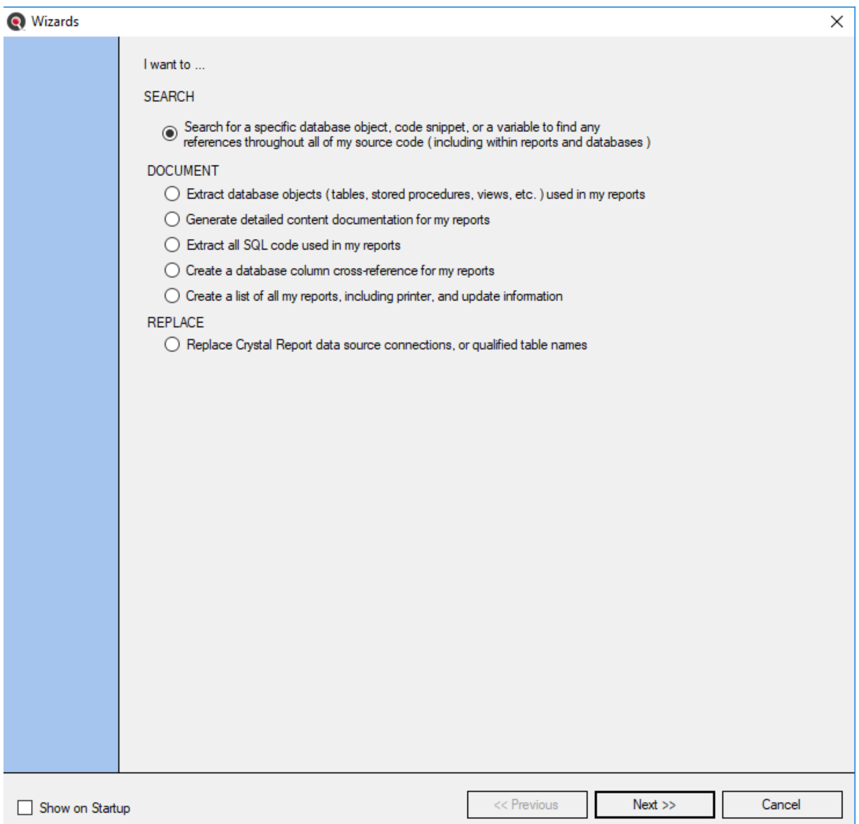
See Also:

- "Wizards Overview" on page 110
- "Perform a Regular Search" on page 135
- "Use the Expression Builder" on page 140
- "Work With Search Results" on page 150
- "View Search Result Details" on page 165

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).

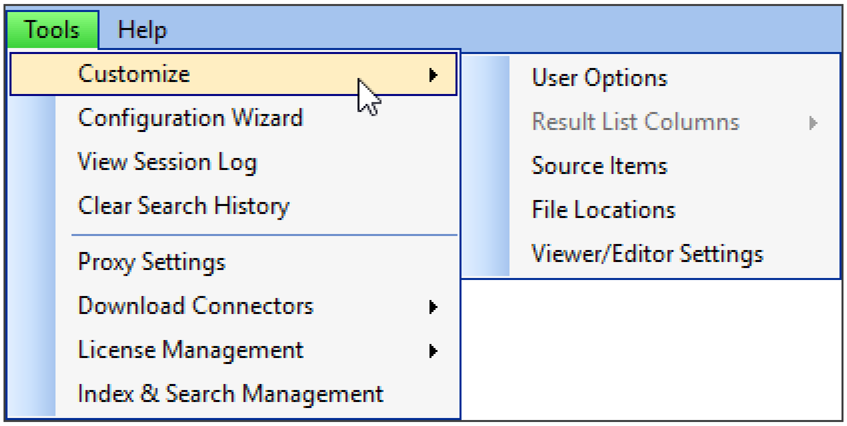
Navigation

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
Extract database objects (tables, stored procedures, views, etc.) used in my reports	***Document -> Business Intelligence -> Database Cross-Reference***	XLSX
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
Create a list of all my reports, including printer and update information	***Document -> Business Intelligence -> Report Listing***	XLSX
Replace Crystal Report data source connections or qualified table names	***Replace -> Crystal Reports -> Data source connections or qualified table names***	
Set my Crystal Reports to "No Printer"	***Replace -> Crystal Reports -> Set Reports to "No Printer"***	

See Also:

- "Perform a Regular Search" on page 135
- "Launch the Wizards" on page 110
- "Use the Expression Builder" on page 140

Customize Find it EZ Program Settings



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

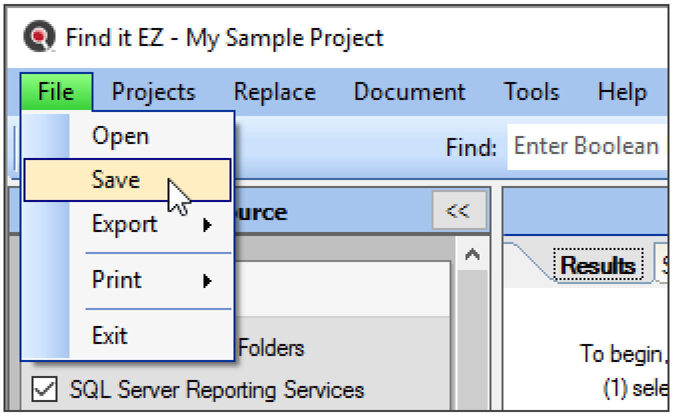
- To show or hide the **Source** panel on the left, see "Product Overview" on page 30
- To expand or collapse **Source** items, see "Product Overview" on page 30
- To add or remove **Source** items, see "Configuration Wizard" on page 59 or "Show or Hide Source Items" on page 53
- To show or hide **Project Settings** each time you select a source item, see "File Locations and Source Settings" on page 73
- To customize file type processing by extension or select a custom source item "opens with" viewer / editor, see "Viewer / Editor Settings" on page 56
- To customize **Results** list columns, see "Show or Hide Result List Columns" on page 53
- To show or hide the **Wizards** on start-up, see "Show Wizards on Start-up" on page 114

File Menu Options

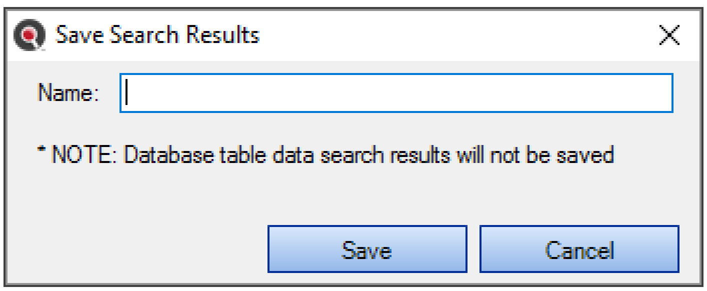
This section describes the various options available via the ***File*** menu. Follow the steps to save or open saved search results, save project settings, export or print search results, and to exit Find it EZ.

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:

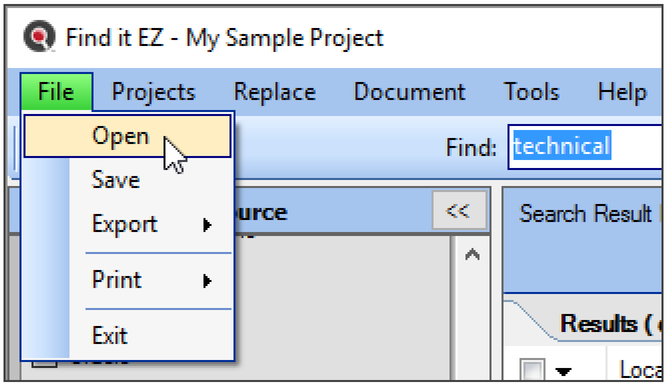


4. In the **Name** text box, enter a descriptive name for the results.
5. Click on the **Save** button.

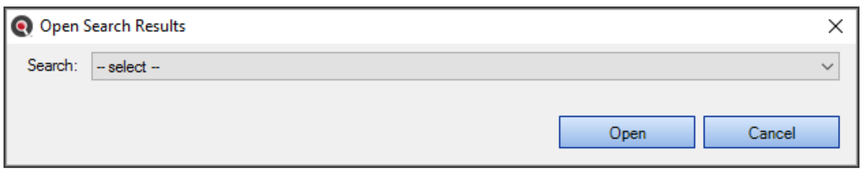
Note: Once you save search results, every subsequent change to the search results elements are automatically re-saved. Also, If any search results have annotations or have been marked complete and you attempt the exit/close the program without first saving your results, you will be prompted to save your 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 110
- "Perform a Regular Search" on page 135
- "Add or Edit Annotations" on page 173
- "Mark Item(s) Complete or Incomplete" on page 169

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 24

Export Search Results

Follow these instructions to export data following a search using the ***File -> Export*** menu:

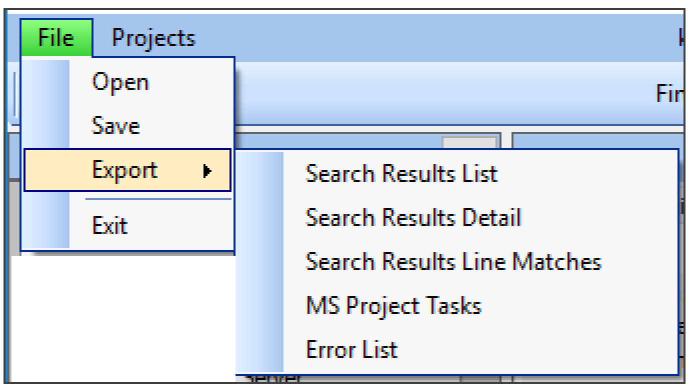
- ***Search Results List***
- ***Search Results Detail***
- ***Search Results Line Matches***
- ***MS Project Tasks***
- ***Error List***

When you generate any of these reports with the exception of the Error List, a **Select the items to include** dialog appears so that you can filter which search items are to be included in the file contents generated. For the Error List, all search errors are included. Select your content filter preference for any of the other reports and click the **Next** button, a **Save As** dialog appears. Browse to the folder location where you would like to save the file, select the output file type, enter a **File name** and click on the **Save** button. The report is created and a **Save Complete** alert dialog window appears. To view the saved report, click on the **View Now** button.

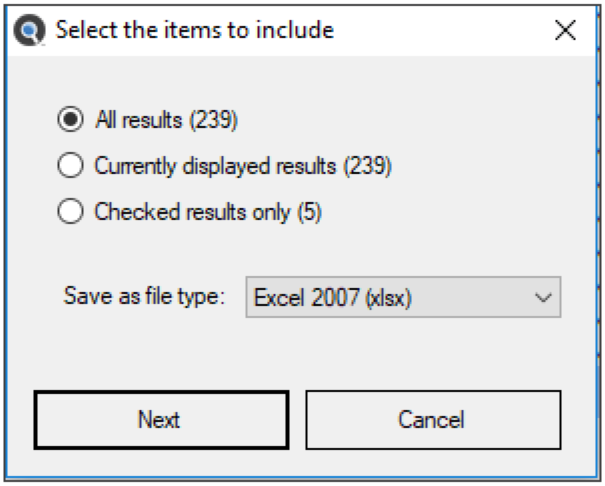
Export Search Results List

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).

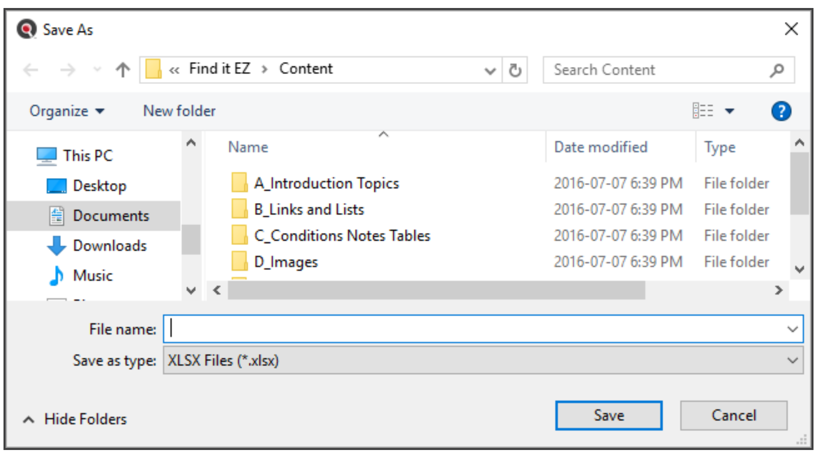
1. Open a previously saved search result using the ***File -> Open*** menu or perform a search.
2. From the Find it EZ menu, select ***File -> Export -> Search Results List*** .



3. A **Select the items to include** dialog will appear.



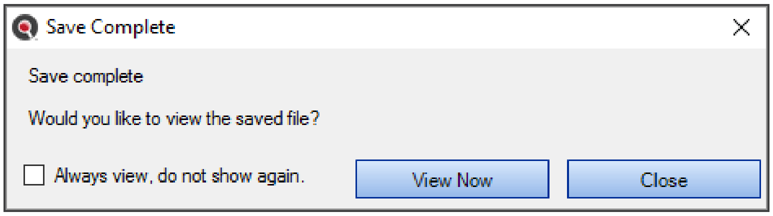
   a. Click to choose one of the options; **All results**, **Currently displayed results**, or **Checked results only**.
   b. Chose a file type from the options available.
   c. Click on the **Next** button. A **Save As** dialog box will appear.



      i. Navigate to the destination folder.
      ii. Enter the desired **File name**.
      iii. Click on the **Save** button.

d. A **Save Complete** dialog 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** dialog, click on the **Close** button.

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

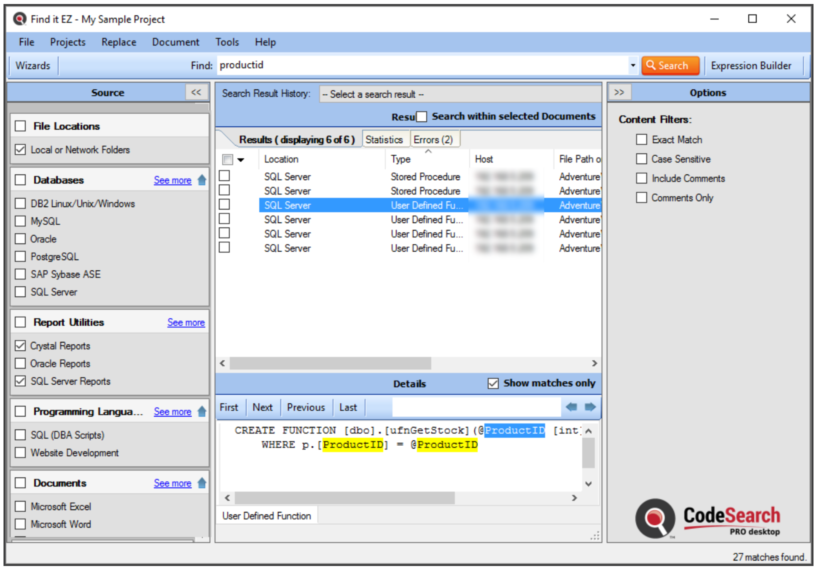
- Source **Location**
- File **Type**
- **Host** Name
- **File Path or Database**
- **Document** Name
- Number of **Matches**
- **Annotations**

Export Search Results Detail

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).

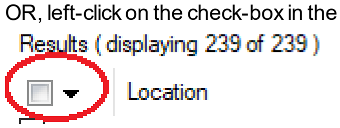
1. Open a previously saved search result using the ***File -> Open*** menu or perform a search.
2. To export selected details only:

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

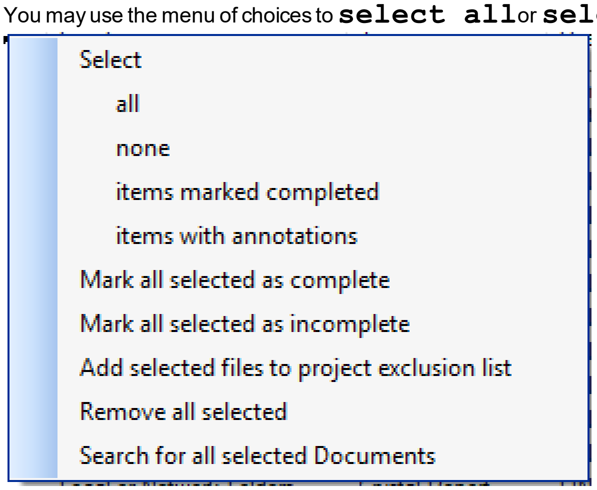


   a. Left click the check-box next to each item you wish to include from the results list.

   b. OR, left-click on the check-box in the results title bar for a drop down list of actions available.

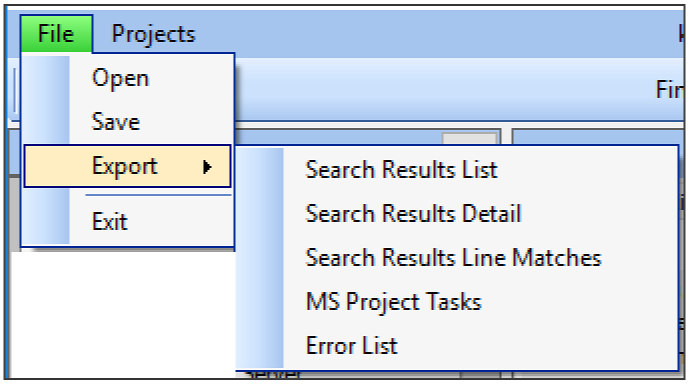


   You may use the menu of choices to **`select all`** or **`select none`**, etc.

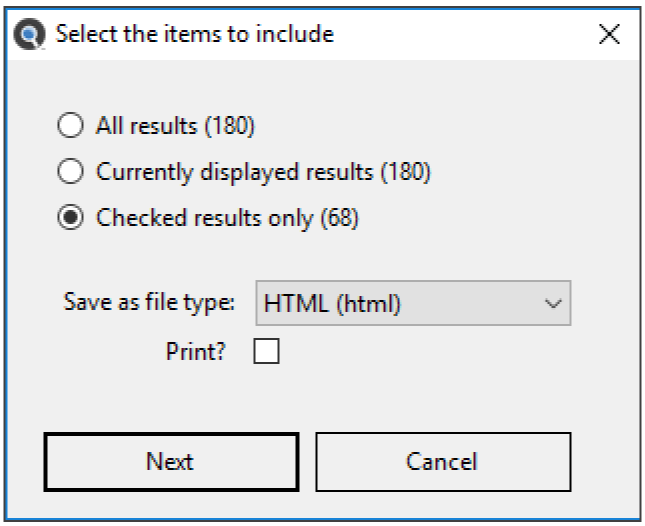


   c. OR, right - click for a context menu to appear. You may use this context menu to **`select all`** or **`select none`**, etc.

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

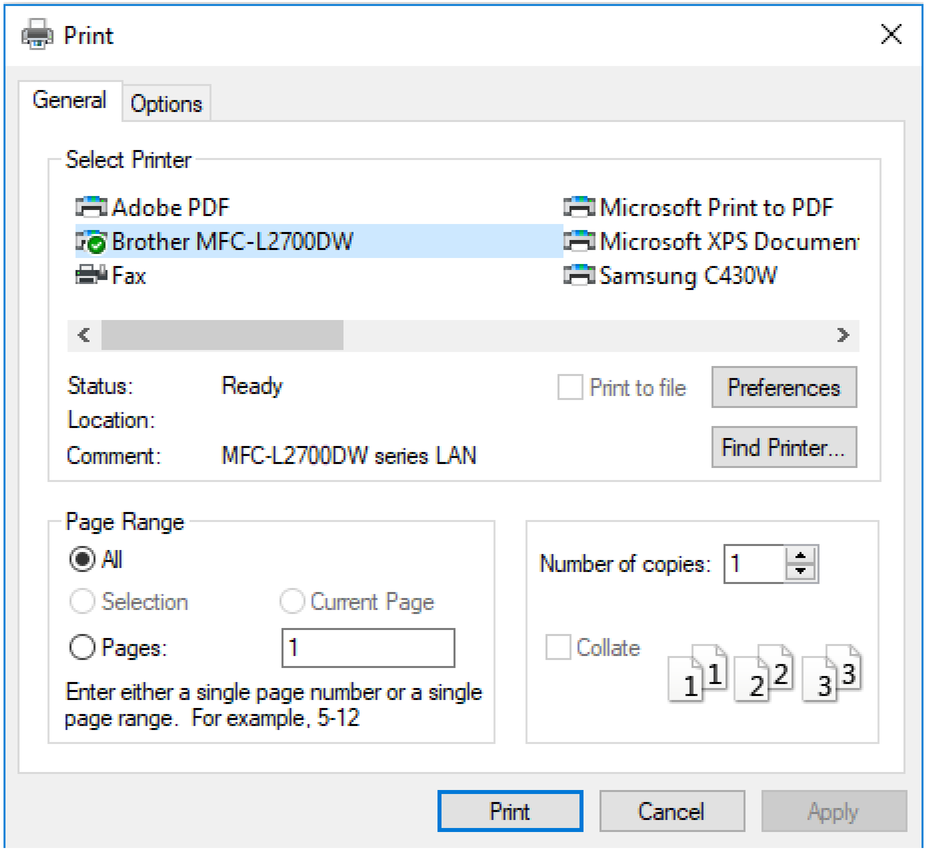


4. A **Select the items to include** dialog will appear.

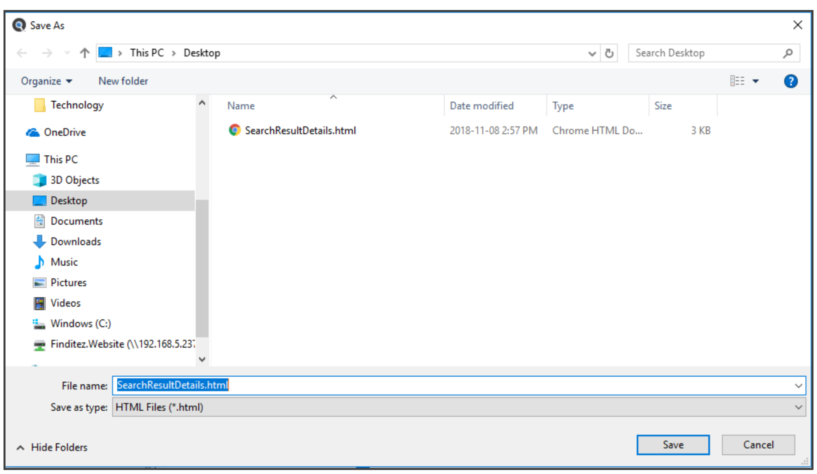


   a. Click to choose one of the options, select **Checked results only** to export the subset of checked search result items if applicable per step 2 above.

b. Optionally check the **`Print`** check-box to bring up the print dialog.



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



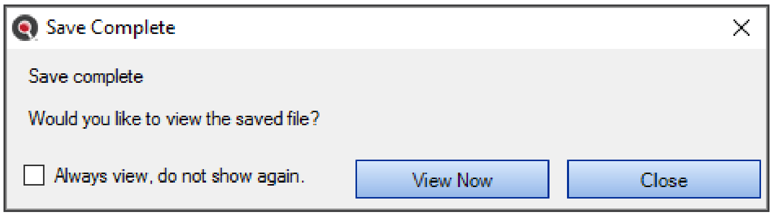
i. Navigate to the destination folder.

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

iii. Click on the **Save** button.

d. A **Save Complete** dialog 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.

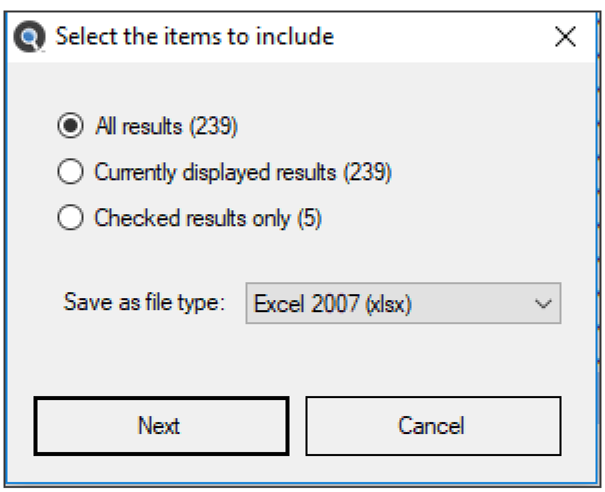
ii. To close the **Save Complete** dialog, click on the **Close** button.

5. Exported search results detail will contain a copy of all highlighted search matches in full context. A single HTML file will be created, with each search result source item having a title and page break to separate documents included. It is essentially a copy of the search "**Detail**" panel contents for all selected search results items.

Export Search Results Line Matches

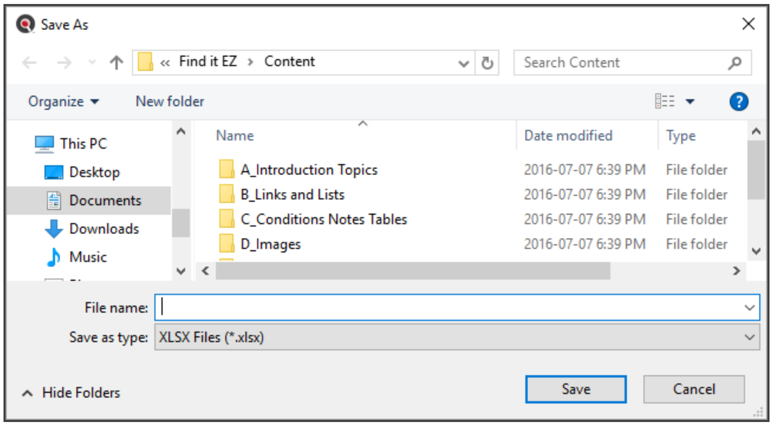
An exported search results details will create a spreadsheet containing all or a subset of your search results. This saved .xslx file can then be redistributed, changed, or printed using your default spreadsheet editor (e.g. Excel).

1. Open a previously saved search result using the ***File -> Open*** menu or perform a search.
2. From the Find it EZ menu, select ***File -> Export -> Search Results Line Matches***.
3. a. A **Select the items to include** dialog will appear.



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

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



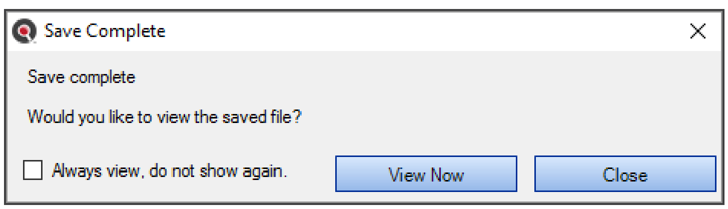
i. Navigate to the destination folder.

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

iii. Click on the **Save** button.

iii. A **Save Complete** dialog 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.

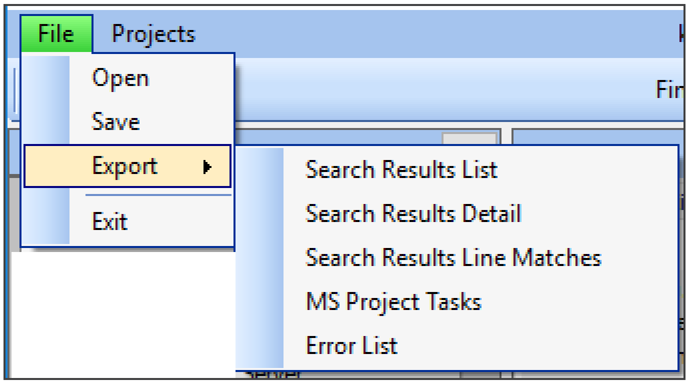
ii. To close the **Save Complete** dialog, click on the **Close** button.

4. 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**

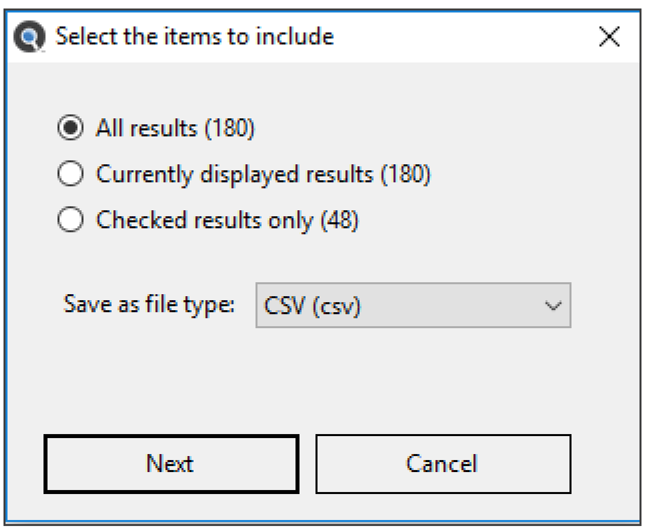
Export MS Project Tasks

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***.

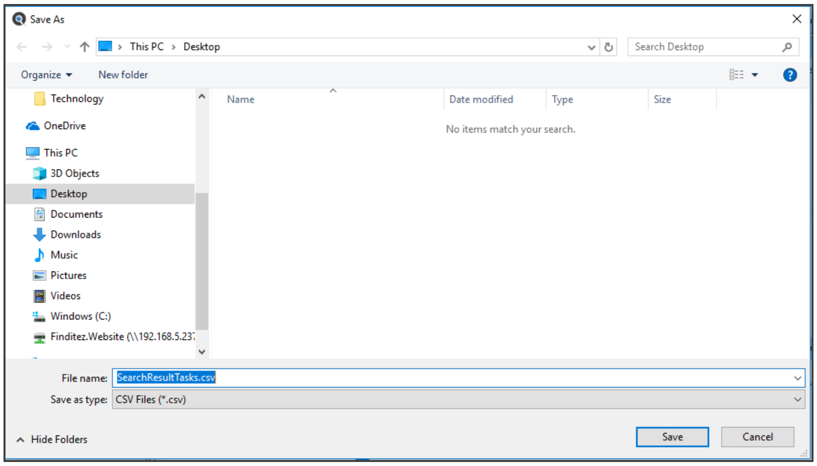


3. A **Select the items to include** dialog will appear.



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.



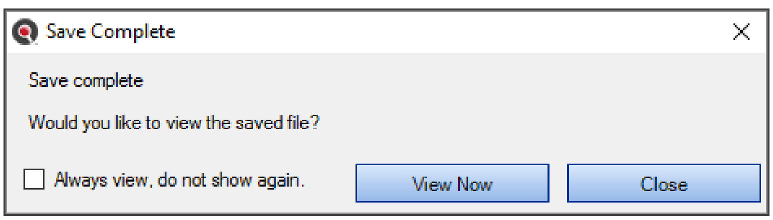
i. Navigate to the destination folder.

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

iii. Click on the **Save** button.

c. A **Save Complete** dialog 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** dialog, 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

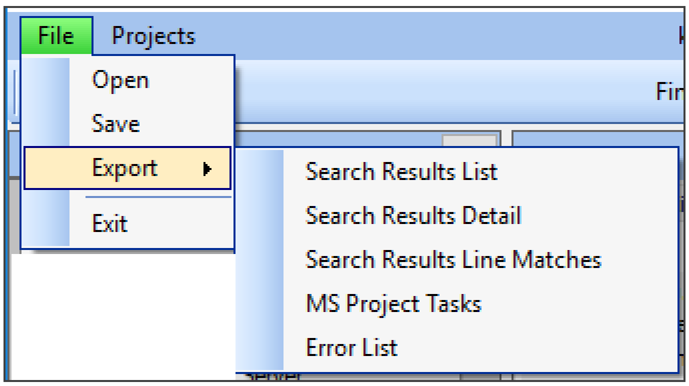
1. Open Microsoft Project.
2. From the ***File*** menu, select **New**.
3. On the **New** page, click **New from Excel workbook**.
4. In the **Open** box, click the arrow next to **XML Format**, and pick **Excel Workbook**.

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.

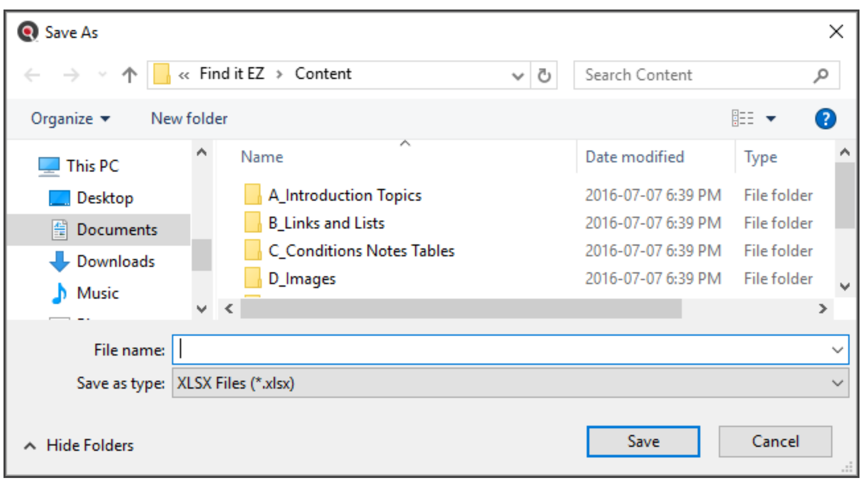
Export Error List

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***.

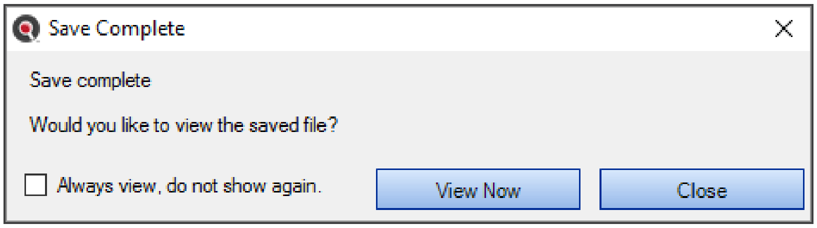


4. A **Save As** dialog box will appear.



   a. Navigate to the destination folder.
   b. Enter the desired **File name**.
   c. Click on the **Save** button.

5. A **Save Complete** dialog 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** dialog, click on the **Close** button.

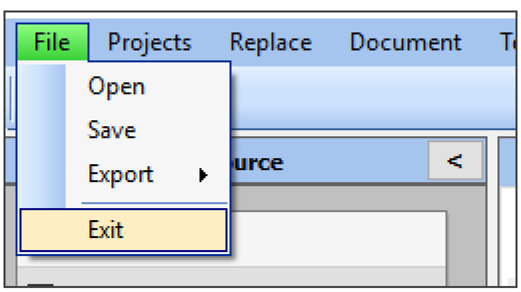
6. The exported error list will contain the following data columns:
    - **Location**
    - **Type**
    - **Host**
    - **File Path or Database**
    - **Document**
    - **Error**
    - **Details**

See Also:

- "File Menu Options" on page 33
- "Wizards Overview" on page 110
- "Perform a Regular Search" on page 135
- "Work With Search Results" on page 150
- "Viewer / Editor Settings" on page 56

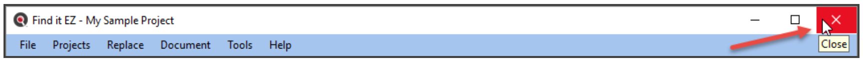
Exit Find it EZ

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.

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 reports in preparation for a possible upgrade to discover which ones are not currently compliant with your corporate standards for recommended best practises involving table join syntax in the queries, you could chose any on of the following:

Many Find it EZ built-in documentation extracts will give you precisely what you are looking for. One is the "***Show SQL Queries***" document. 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 "***Column Cross-Reference***" 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.

For more details on each document type available, please see below.

> 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 reached. See below for more information.

Business Intelligence Reports

BI Reports can be generated and accessed as follows:

From the menu, select ***Document -> Business Intelligence -> [desired report]*** . See report options below:

- ***Database Cross-Reference*** - generates a single spreadsheet cross reference containing all database connections, tables, procedures, views, embedded SQL queries, database call statements, table joins, and optionally the underlying SQL code from the source database used in each selected report. This information is a high level summary of database tables used within a report and does not provide individual table column where-used detail (see Column Cross-Reference). Output spreadsheet columns are customizable (include / exclude as needed). See a sample on our website: **XSLX**
- ***Column Cross-Reference*** - generates a detailed where-used spreadsheet listing every location, formula, etc. that each and every source database table column is used. Provides report field name and full context statement referenced. Does not contain high level database connection information (see Database Cross-Reference). Output spreadsheet columns are customizable (include / exclude as needed). See a sample on our website: **XSLX**
- ***Show SQL Queries*** - extracts all embedded SQL queries, database call statements, and drag-n-drop tables and fields used in a report (in the form of a simulated SELECT statement). Output can be to a single file for all selected reports, or individual files for each source file. Output file type options include text and HMTL. See a sample on our website: **HTML** or **TXT**
- ***Reports Definition*** - generates a common formatting and labelled layout of report content, including data source connection information, SQL queries used within the report, database calls, report parameters, formulas, images, etc.. A formatted document with relevant report design meta-data in a standard format re.g.ardless of source report type (eg Crystal Reports, SSRS, Oracle Reports or any other report type supported). Output can be to a single file for all selected reports, or individual files for each source file. Output file type options include text, HMTL and XML. See a sample on our website: **HTML** , **XML** or **TXT**
- ***Report Listing*** - generates a spreadsheet listing your complete report library, including file location, author, last updated, default printer and report title / description. Output spreadsheet columns are customizable (include / exclude as needed). See a sample on our website: **XSLX**

See Also:

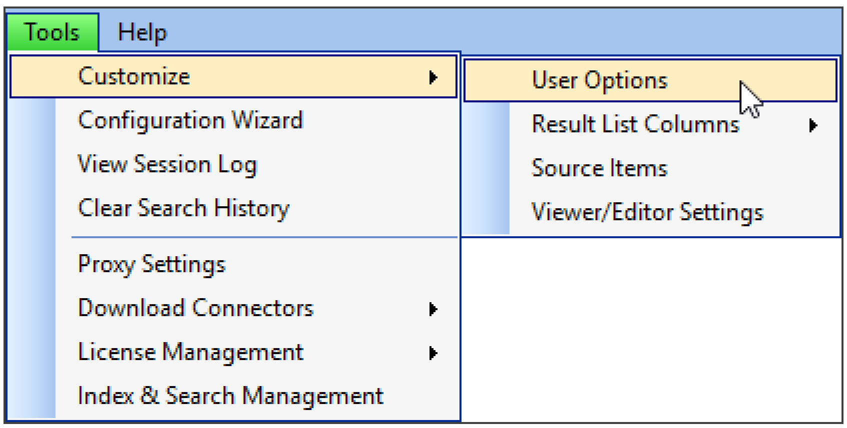
- "Document Wizards" on page 122
- "Export Search Results" on page 36
- "Reporting Tools" on page 204
- "Product Trials and Limits" on page 24

User Settings and Customization

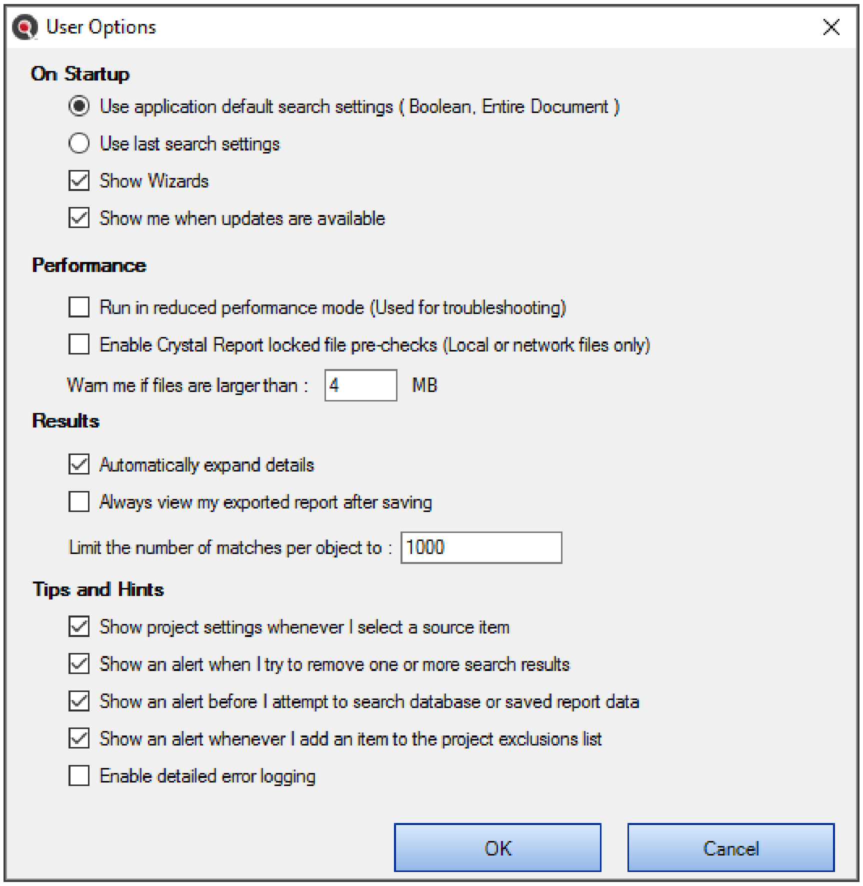
This section describes the steps required to set user options, preferences, and settings for Find it EZ. These configuration settings are permanently saved for each session, allowing each end-user to customize the software to their specific environment (source items) and preferences.

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 unchecked, 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**.

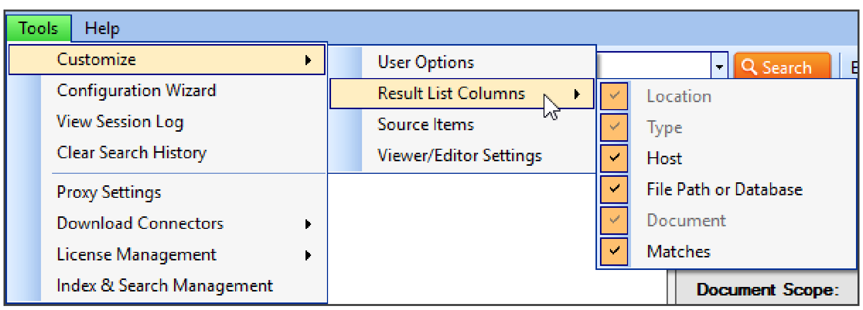
User Option	Description
Show an alert before I attempt to search database data	Every time you are about to run a search that includes database table data, when this option is checked, an alert is displayed. This warns you that the search time may be long, depending on the size of the table. Find it EZ 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 every time 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***.



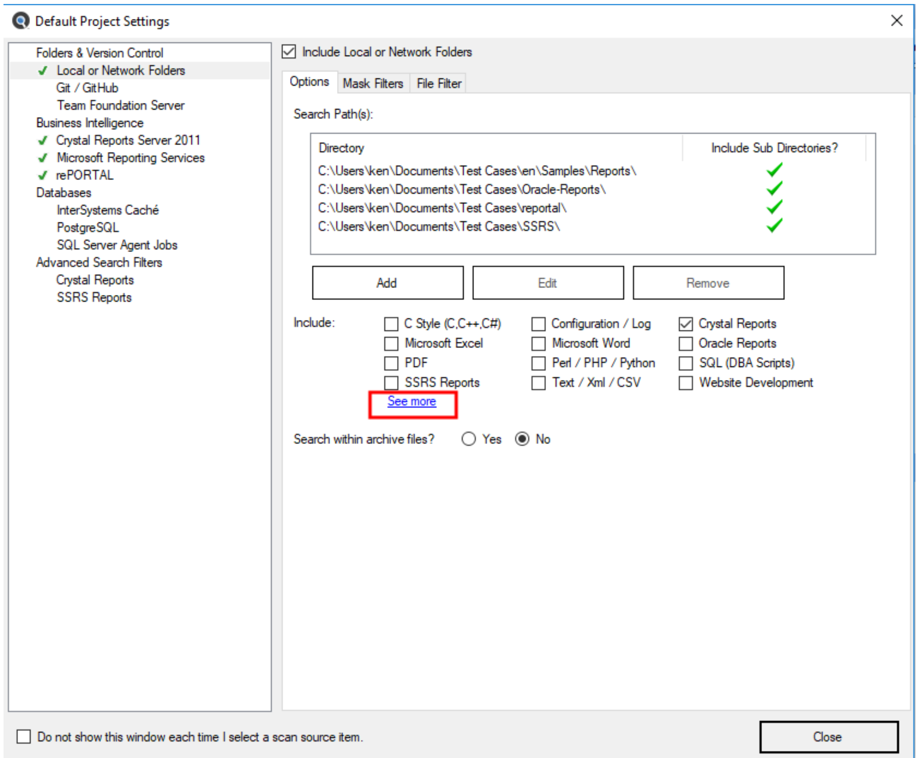
2. A list of column names will appear on the right (as above).
3. Click to show or hide columns, as desired. See note above.

Show or Hide Source Items

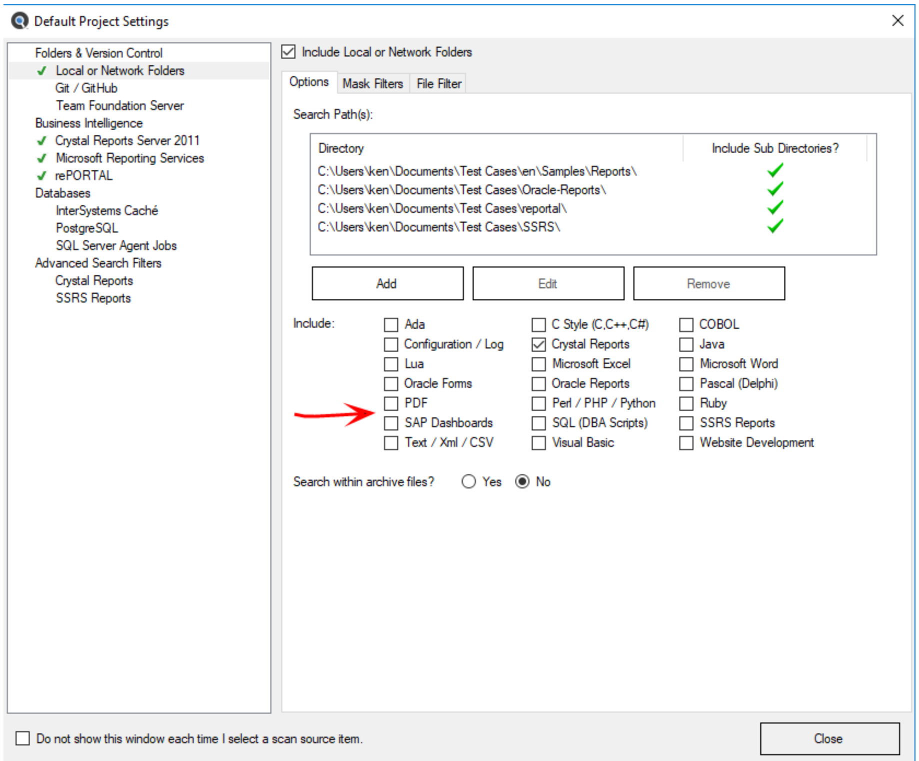
This section describes how you can add (show) source items to correspond to technologies, programming languages, databases and reporting tools used in your work environment. Source items can be added in one of two ways.

1. While configuring project or wizard settings for source locations.
2. Using the **Configuration Wizard**.

You can add (show) source file types while updating the advanced configuration settings on any of the file source location panels. For example, right-click on the `Local or Network Folders` item in the main Find it EZ window `Source` panel to launch the advanced configuration settings:



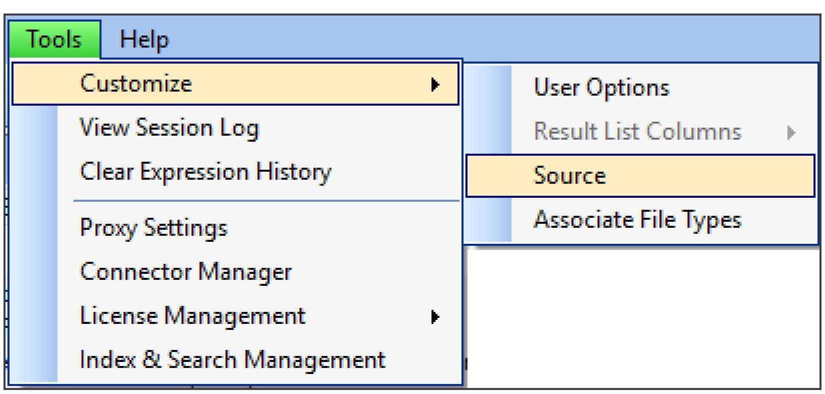
Click on the `See more` hyperlink to view all supported document types for this location. The list will be expanded to allow you to select additional source items currently hidden.



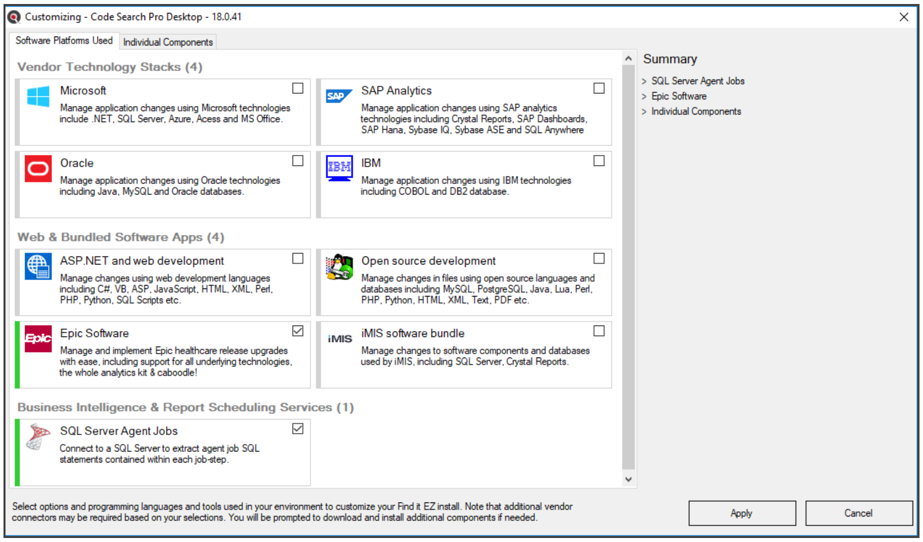
If you check any source item that was previously hidden, this new setting will automatically be saved so that the selected document type will now be visible in all configuration panels or wizards. The checked source setting(s) will be enabled under the **Configuration Wizard** `individual components` tab and will automatically update and be saved to your custom program settings.

Source items visibility can also be set via the **Configuration Wizard**. Source items selected will be reflected in both the main application (`Source` panel) and all Find it EZ wizards. In addtion to "showing" new source items, the **Configuration Wizard** allows you to hide items that are not required. This allows you to customize and clean your Find it EZ workspace and minimize unnecessary items from being displayed on the main `Source` panel or within any of the wizards.

To access the **Configuration Wizard**, from the Find it EZ menu, select ***Tools -> Customize -> Source***.



The **Source Items** dialog box will appear, as below:



Refer to the **Configuration Wizard** section of this user guide for more information.

See Also:

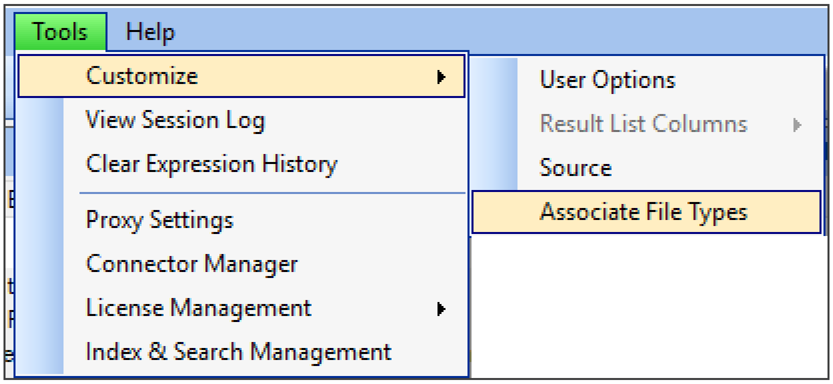
- "Configuration Wizard" on page 59
- "Viewer / Editor Settings" below

Viewer / Editor Settings

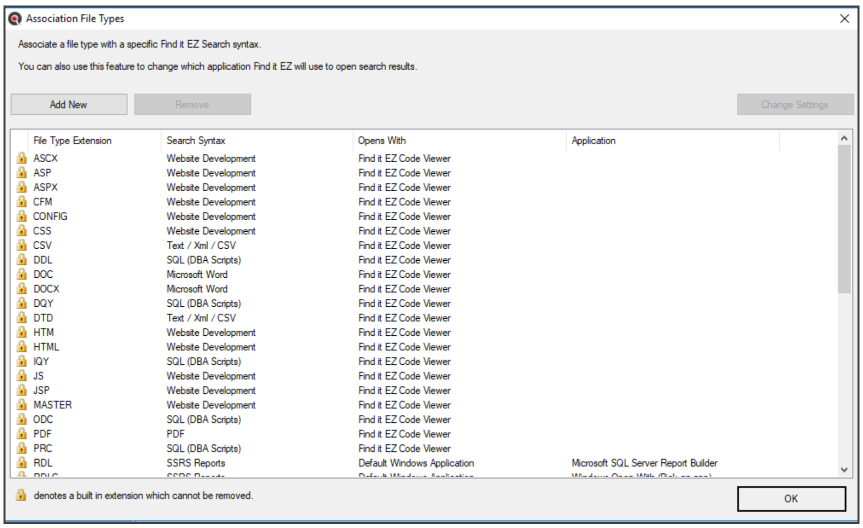
The **File Association** dialog settings allow you to select the viewer / editor used to open a search result list item, as well as to add or remove custom file extensions to be processed by available "search syntax" within the Find it EZ indexing engine. This ability to customize how various file types are handled by the Find it EZ application is useful in situations where corporate naming standards require use of a unique file extension such as ".common" for shared JAVA program modules. The ".common" extension is not recognized as a universal standard JAVA type file, but using this custom file type association within Find it EZ, you can configure the product to treat all files with the ".common" extension as containing JAVA code and to include and process them the same as any other standard JAVA programming language file for example.

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**.

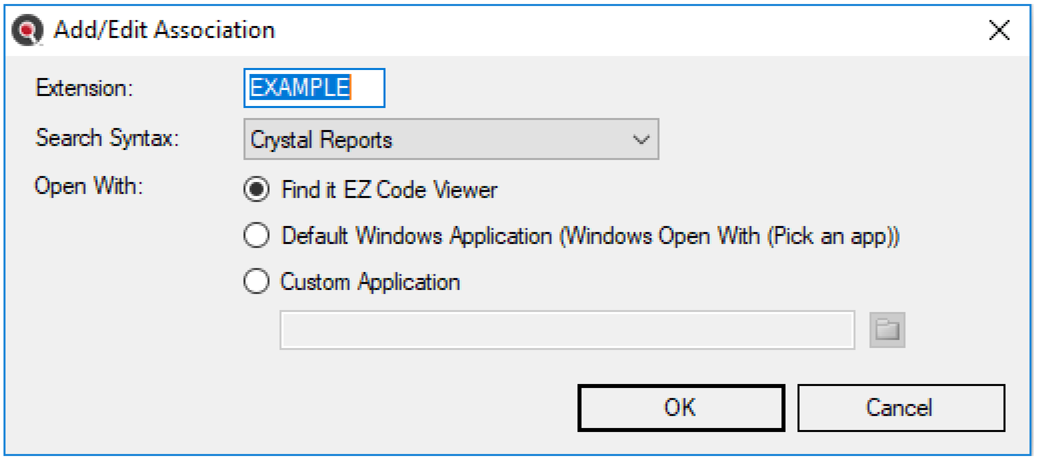
1. From the Find it EZ menu, select ***Tools -> Customize -> Associate File Types***.



2. The **Associate File Types** dialog box will appear, as below:



3. To add a new file type, click the **Add** button, the **Associate File Type - Add / Edit** dialog will appear as below:



Note: The `Default Windows Application` radial button option will automatically reflect "known" extensions on your system. For example, typing in the `Extension` "TXT" will show (NotePad) by default unless you have selected some other editor to open .TXT files.

a. Enter the custom file type you would like to add for processing by Find it EZ in the `Extension` field.

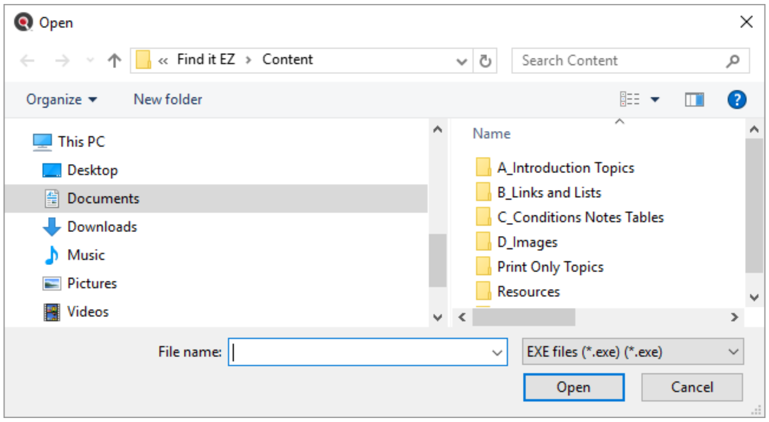
b. Select one of the available Find it EZ `Search Syntax` modules from the drop down list. This will direct the way in which the contents of the files with this extension are to be parsed by our search engine.

> **Note:** The list of search syntax options are limited based on the current set of document source types enabled within the **Customization Wizard**. To add more search syntax options, you must first add one or more file types associated with that syntax.

c. Choose one of the following viewer / editor `Open With` options:
   - `Find it EZ Viewer`
   - `Default Windows Application`
   - `Custom Application`

d. IF `Custom Application` is chosen:

   i. Click on the corresponding folder icon to the right of the `Custom Application` text box. 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.

4. To save any changes and close the **Associate File Types - Add / Edit** dialog box, click on the **OK** button.
5. To discard changes, click on the **Cancel** button.

To change the **Open With** program for an existing file type listed:

1. Click to select (highlight) a file type in the list.
2. Click the **Change Settings** button.
3. The **Associate File Types Add / Edit** dialog will appear.
4. Change the **Open With** settings as desired. See above for **Custom Application** settings instructions.
5. Click on the **OK** button to save and close.

Note: You can not change the **Search Syntax** setting for any file types. To change this setting, simply add an additional entry for the same extension using a different **Search Syntax**. For custom file types, delete any unwanted **Search Syntax** listings.

To remove a custom file type:

1. Click to select (highlight) any custom file type. You can not delete any built-in file types identified by a locked image 
2. Click on the **Remove** button.
3. Click on the **OK** button to save and close.

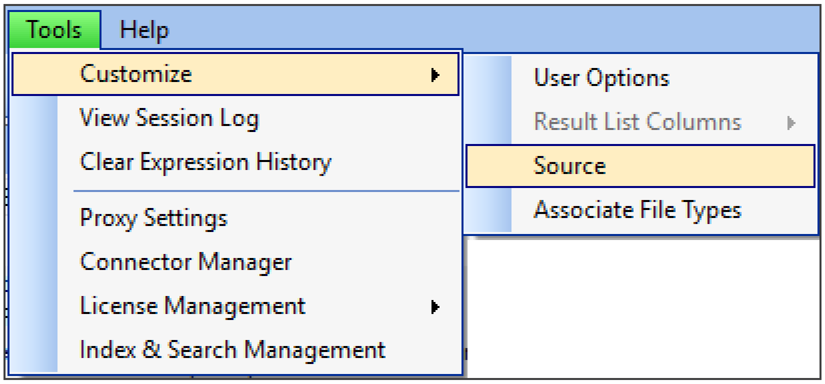
Alert: You can add duplicate file type extension entries, but each must be unique by **Search Syntax**. Duplicate entries will process files with that extension using each unique **Search Syntax** selected. This may produce duplicate search results for the same file and is not recommended.

Configuration Wizard

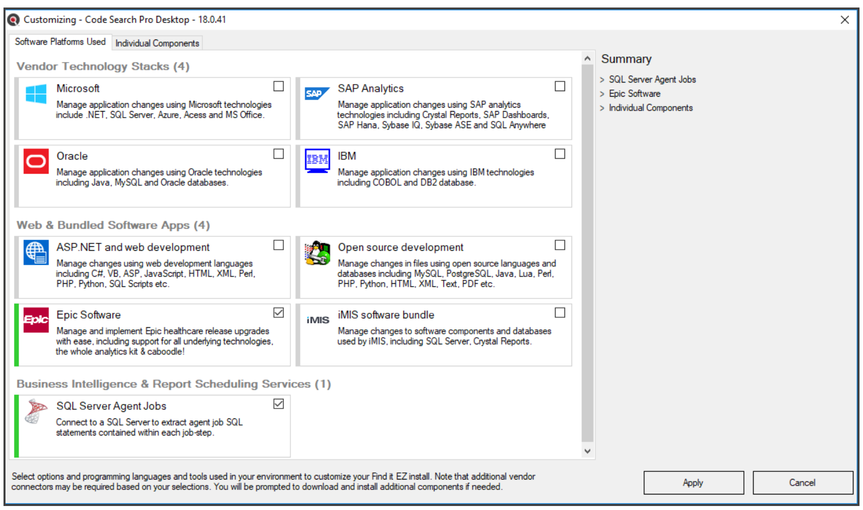
The Configuration Wizard walks you through the steps required to set up your Find it EZ program so that it is customized to your environment. It is recommended that you only select and display reports, databases, repositories, programs, version control systems and other files in use within your organization. The configuration wizard is automatically launched after each install, including product 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 ->Customize->Source***.

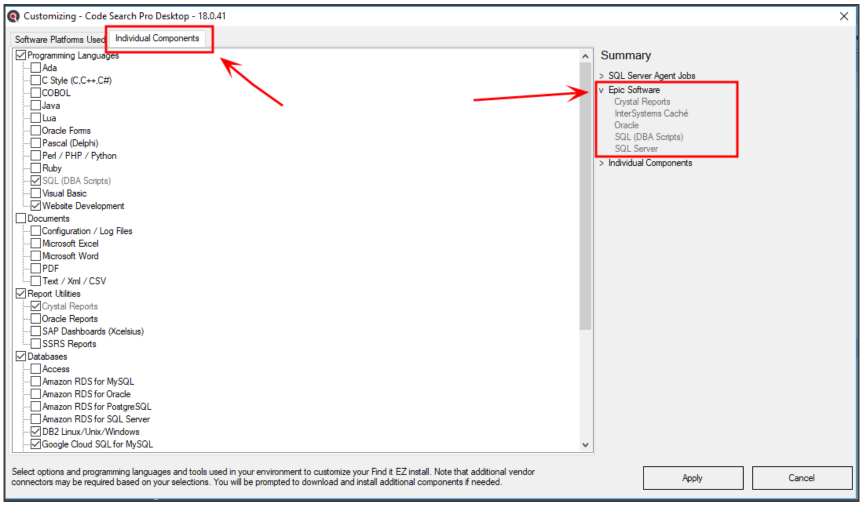


2. The **Configuration Wizard** will appear, as below:



3. Click all boxes that apply to the technologies and vendor software that your shop uses or supports. This will in turn enable (select) all individual source databases, programming languages and reporting tools bundled / provided in that vendors product / portfolio that Find it EZ supports.

4. Click on the `Individual Components` tab and scroll through to see all checked items or expand all of the `Summary` categories on the right to display the complete list of items selected.



5. From the **`Individual Components`** tab, click to select any additional database types, programming languages, documents and report utilities used by your organization. Selecting a subset of these available technologies supported by Find it EZ allows you to fully customize the source panel on the main application window and wizards project configuration panels to only display the items applicable to your work space.
   a. To save your custom settings, click on the **Apply** button.
   b. To discard any changes, click on the **Cancel** button.

Note: If one or more items selected is greyed out, this means it is included in a vendor bundle from the **`Software Platforms Used`** tab. You must deselect the corresponding bundle(s) to deselect the item(s) in the **`Individual Components`** tab. An individual item may be included in more then one software platform set .. expand the **`Summary`** items to view all items included within each software platform bundle.

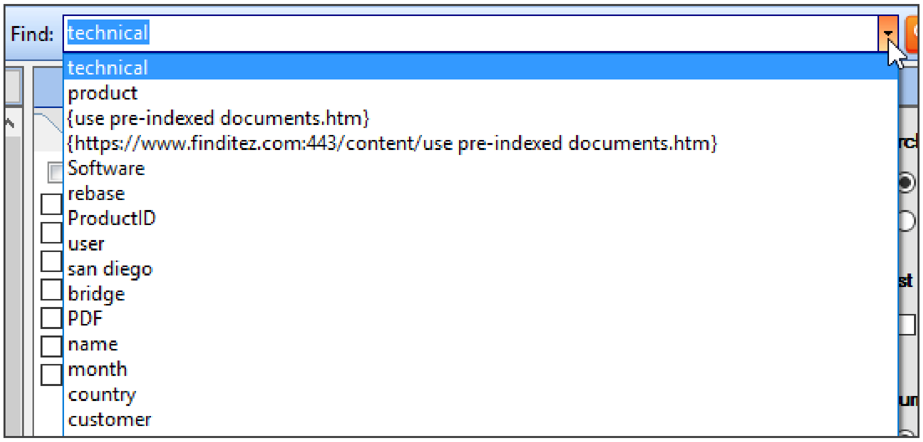
Alert: Changing these selections may require Find it EZ to prompt for required vendor connectors upon first use and/or may restart the program to apply new settings.

See Also:

- "Download Connectors" on page 247
- "Show or Hide Source Items" on page 53
- "Viewer / Editor Settings" on page 56

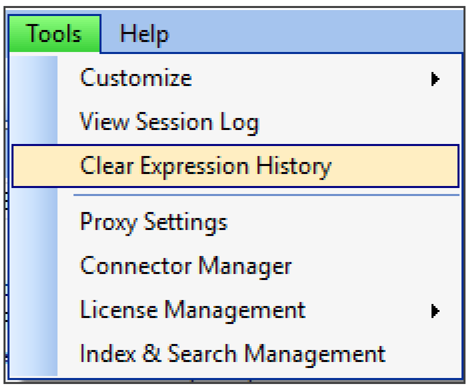
Clear Expressions History

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 Expression 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:

- 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:

- 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:

- C:\ProgramData\Bits n Bytes Software Inc\Find it EZ\Data*username*\Index2\DOCUMENTS.*
- C:\ProgramData\Bits n Bytes Software Inc\Find it EZ\Data*username*\Index2\PRJDOCUMENTS.*
- 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:

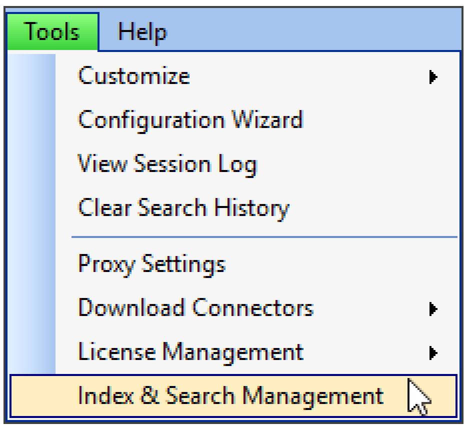
- C:\ProgramData\Bits n Bytes Software Inc\Find it EZ\Data*username*\Index\config.db

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.

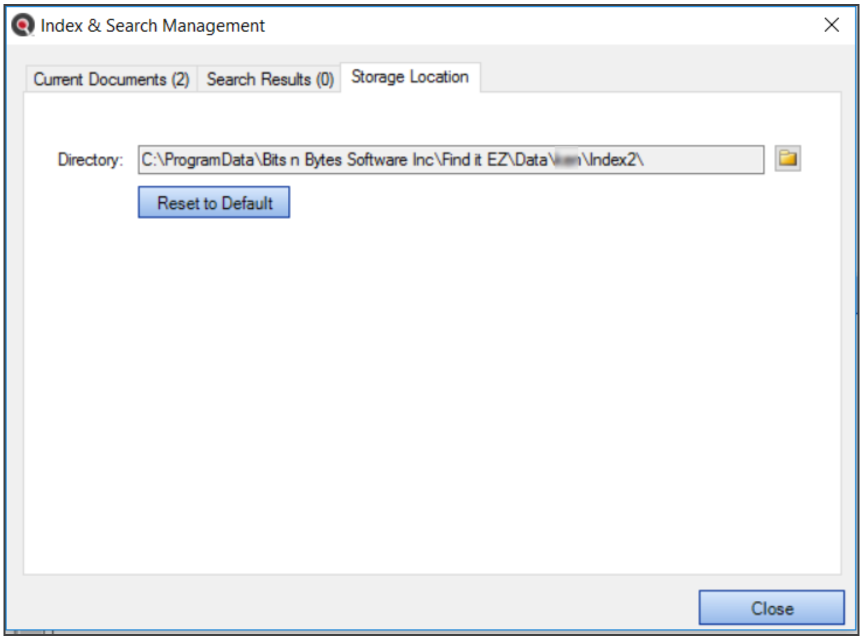
Alert: Manipulating data in this database directly will corrupt your Find it EZ project settings. You will lose your project settings and be forced to Reset to factory defaults with our repair utility (see below).

Change Index Storage Location

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

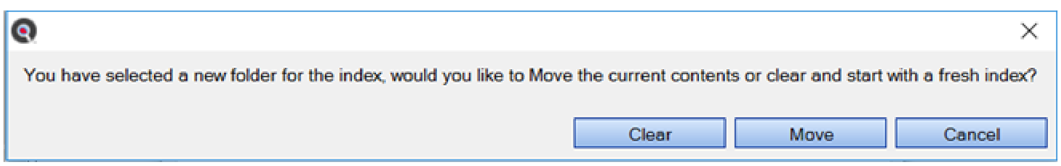


2. The **Index & Search Management** dialog box will appear, as in the example below:



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

3. Select the **Storage Location** tab. Click on the folder browser button . 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.



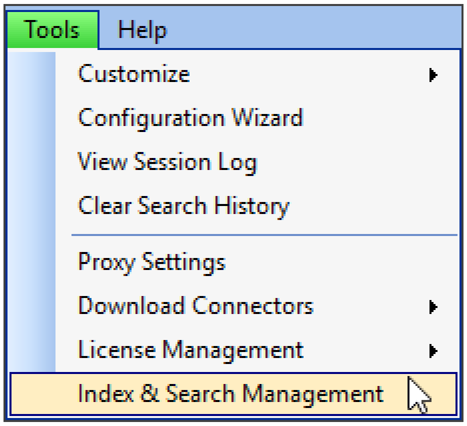
5. Click the **Clear** button to create a new, empty index or click the **Move** button to copy your current indexed documents to the new location. Click the **Cancel** button to abort.

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

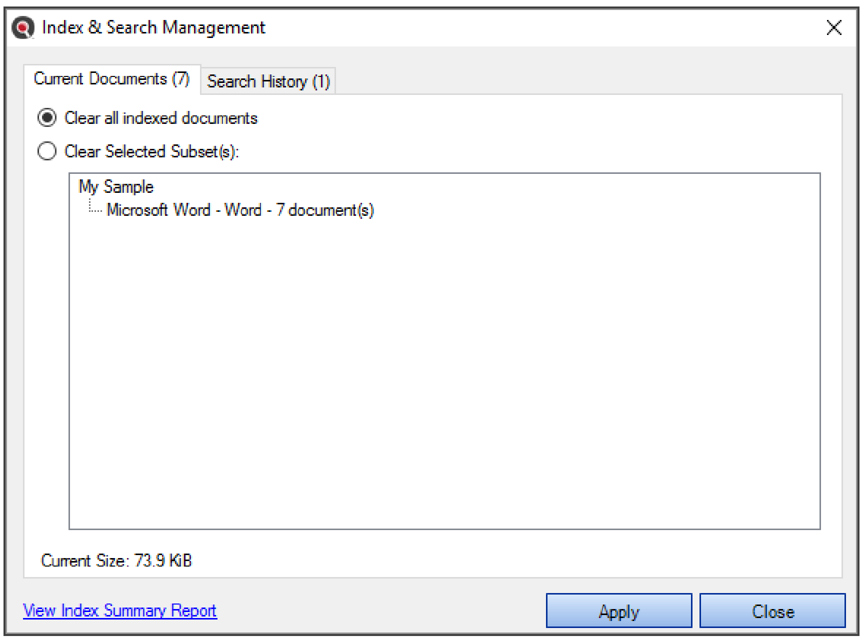
Clear Index or Subset

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:

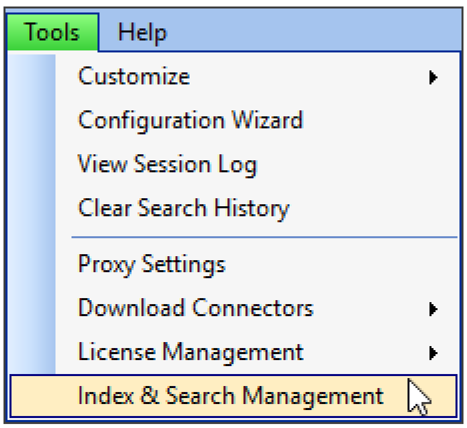
   a. Click to choose the **Clear the following subset** option. A check-box will appear before each project and subset.

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

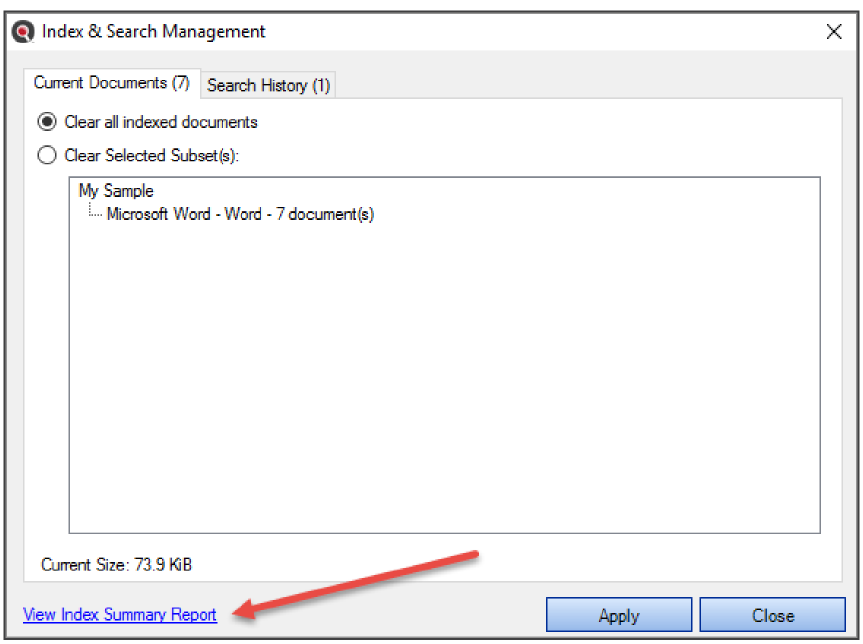
   c. Click on the **Apply** button. The selected project(s) and or subset(s) will be cleared from the index.

View Index Summary Report

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



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



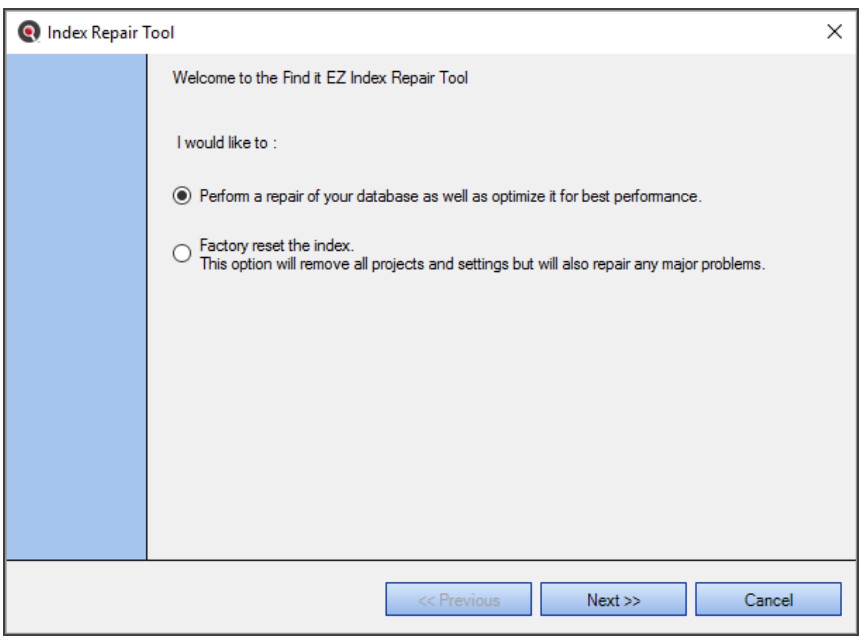
3. At the bottom of the dialog box, click on the **View Index Summary Report** link. The **Index Summary** report will open in the selected viewer.
4. The report will include the following data; one row per unique document:

- **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.

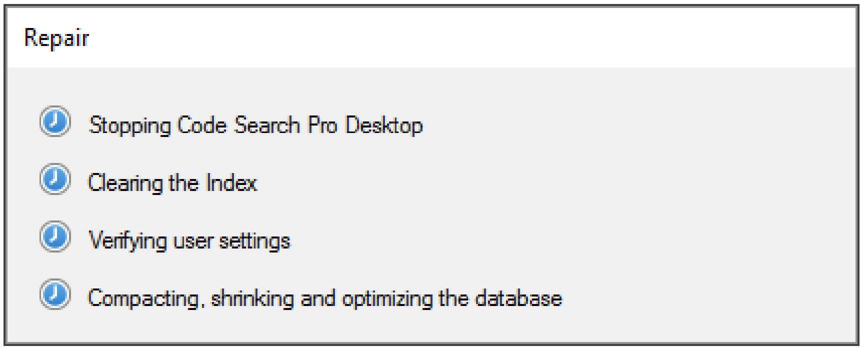
1. To start the repair tool, use the Windows Start menu to navigate to executables installed within the Find it EZ programs folder.
2. Run the **Index Repair Tool**.



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.



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.

Projects

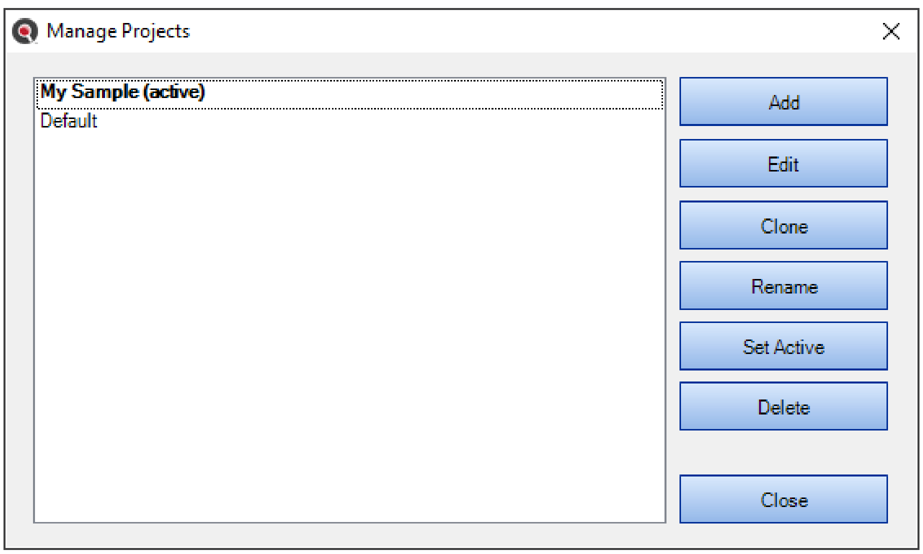
This section provides step-by-step procedures to add, edit, switch, clone, rename, set active, delete, or save a project and its settings.

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.

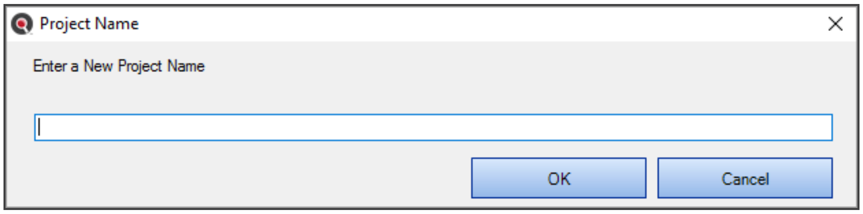
Projects are a key feature for organizing your work within Find it EZ, and the ability to configure each once, and then re-use settings between indexing and search passes, is a huge time saving benefit.

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 dialog will appear.

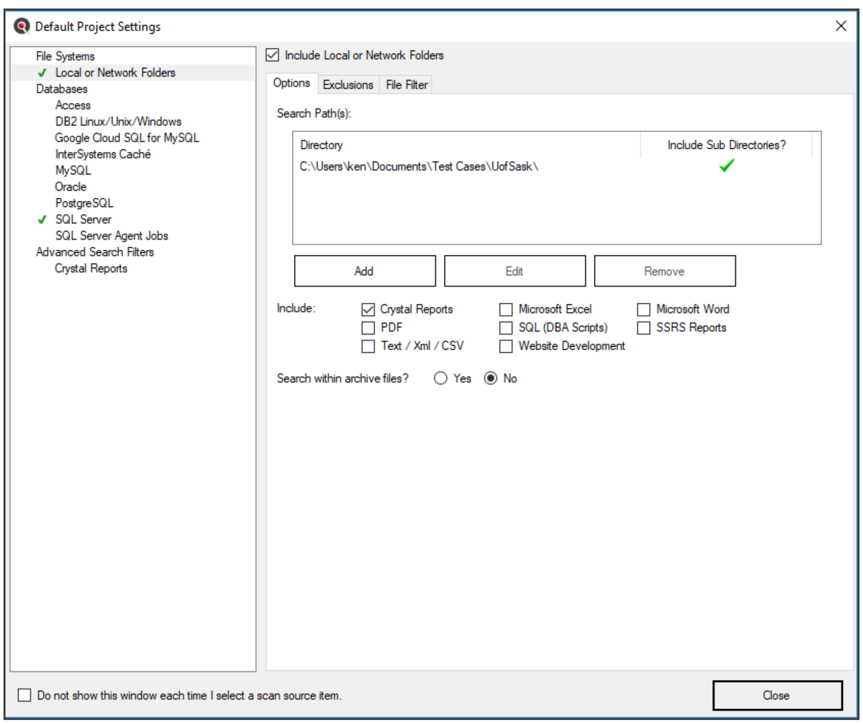


2. Enter the name of the new project.
3. Click on the **OK** button. The new project will be added to the list.
4. To close the **Manage Projects** dialog box, click on the **Close** button.

Edit a Project

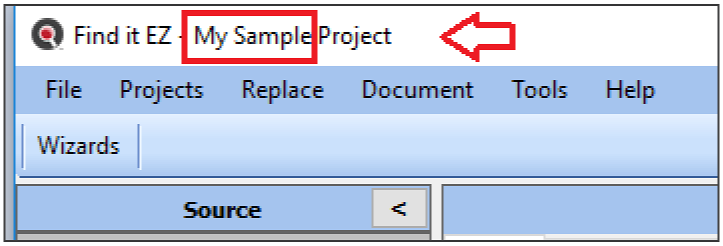
You may change the configuration settings to add a new file path, add a new database schema or owner to include that set of objects, add file or database object filters and so on.

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:

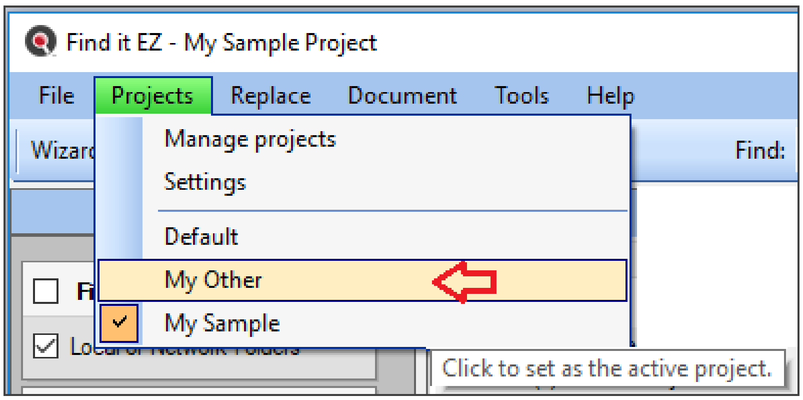


Switch Between Projects

1. The name of the currently viewed project is shown in the top, left corner of the main screen **Title Bar**. See below:



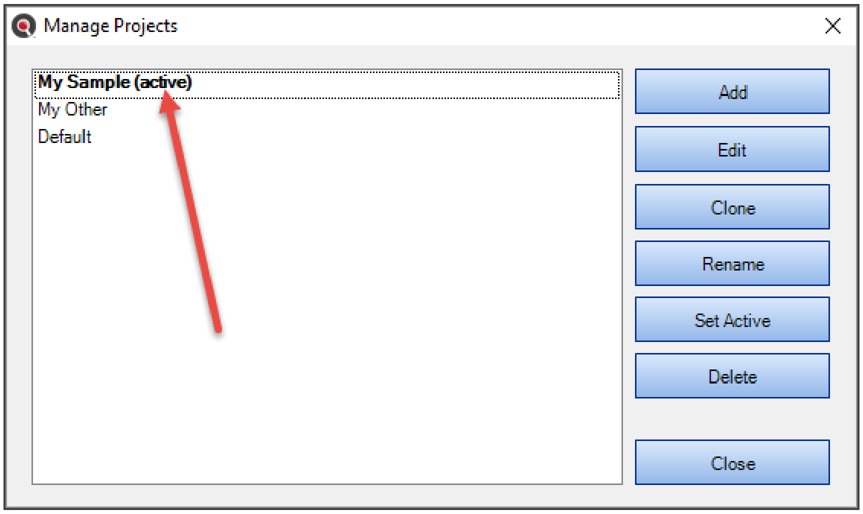
2. To switch to another project:
   - From the Find it EZ menu, select ***Projects -> [Project Name]*** .



   - 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)."

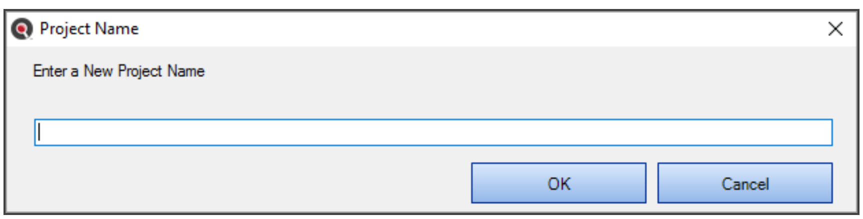


3. To close the **Manage Projects** dialog box, click on the **Close** button.

Clone a Project

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

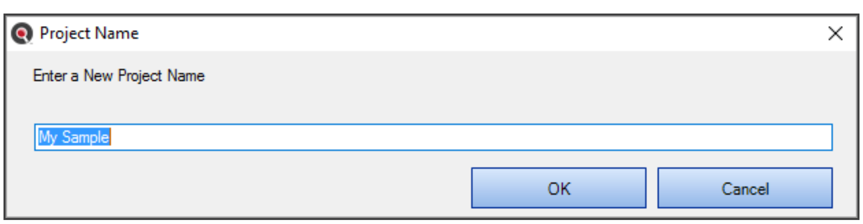
1. From the **Manage Projects** dialog box, click to select the project you want to clone (i.e. copy all settings).
2. Click on the **Clone** button. A dialog will appear.



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 dialog 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.

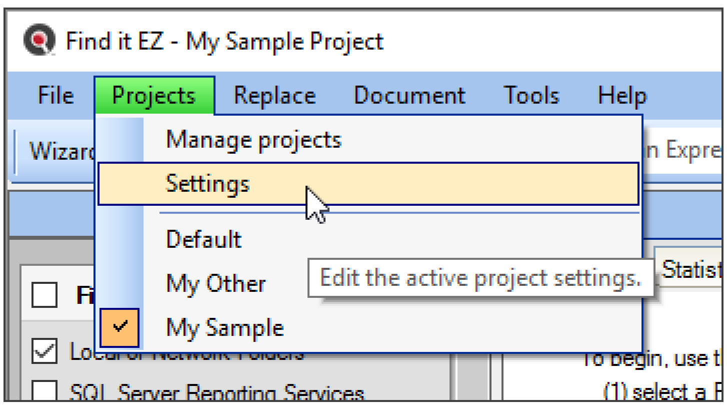
File Locations and Source Settings

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

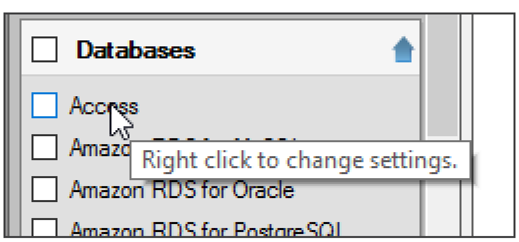
Note: Some project configuration settings are used in combination with each-other. For example, in order to include any Programming Language files, Reports or Other Documents, you must select and configure the physical “Location” of those files. This could include a local or network folder.

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:

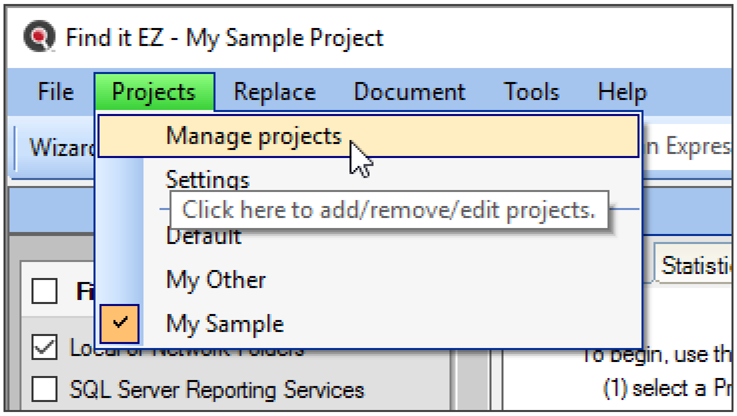


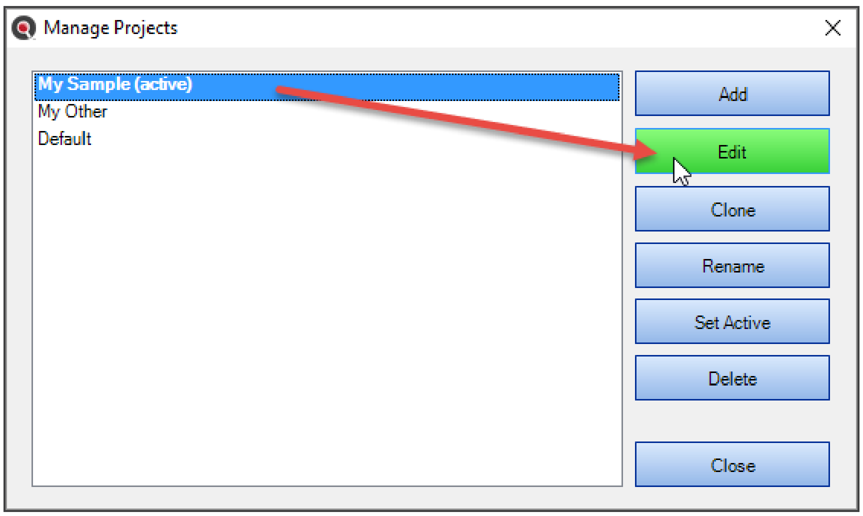
2. Within the main program window, right-click on any location or source item within the expanded **Source** panel. The advanced settings for the active project source item will appear (see sample below).

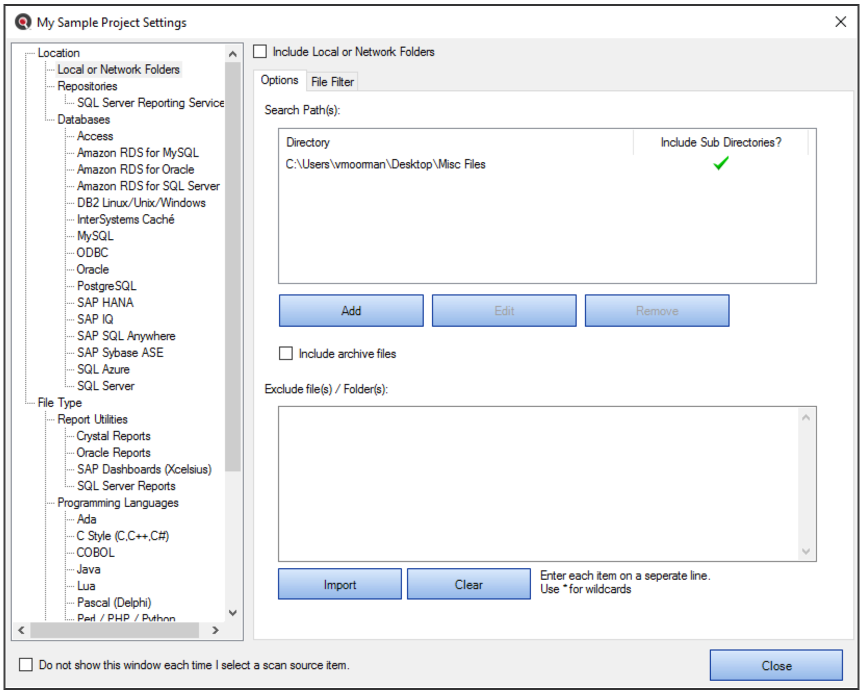


3. From the **Manage Projects** dialog box, click to highlight a project from the list, then click on the **Edit** button to access the

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 50 (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

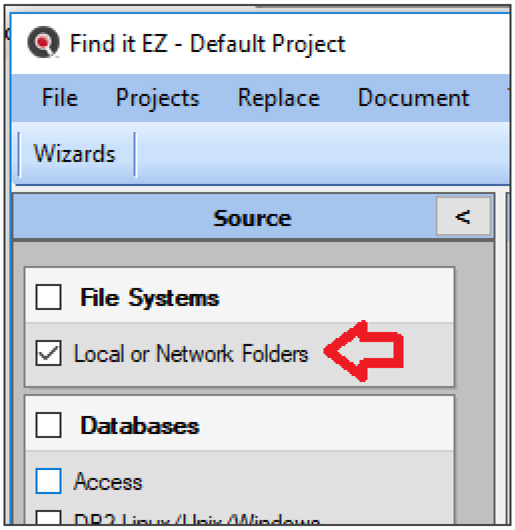
This section provides detailed steps required to configure project settings for local or network folders, repositories, and databases. These are the physical locations of the source files, documents, and data included within a project.

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.

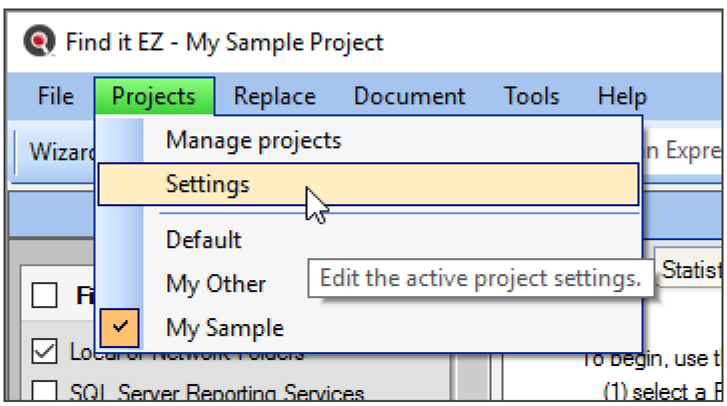
To access the active project settings for local or network (source) folders:

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

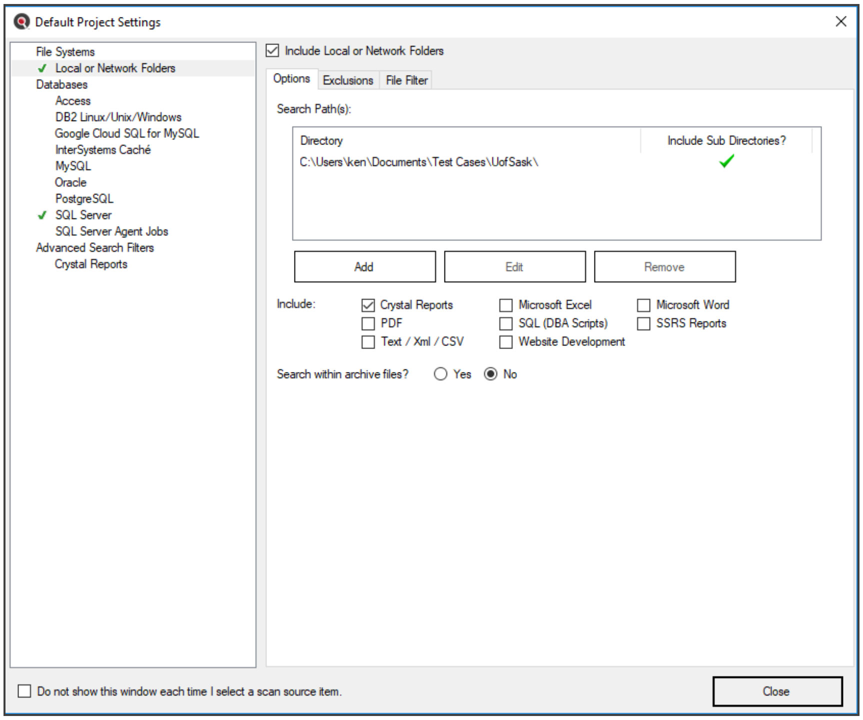


OR

2. From the menu, select ***Projects -> Settings*** . See below:



3. The following dialog box will appear:



Include Source

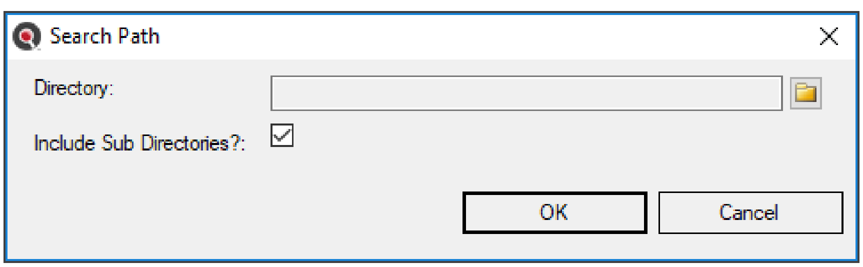
When a source item is selected from the frame on the left, the **Include [Source Name]** check-box at the top of the dialog box is checked by default. To exclude the source from your search, click to un-check the check-box.

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

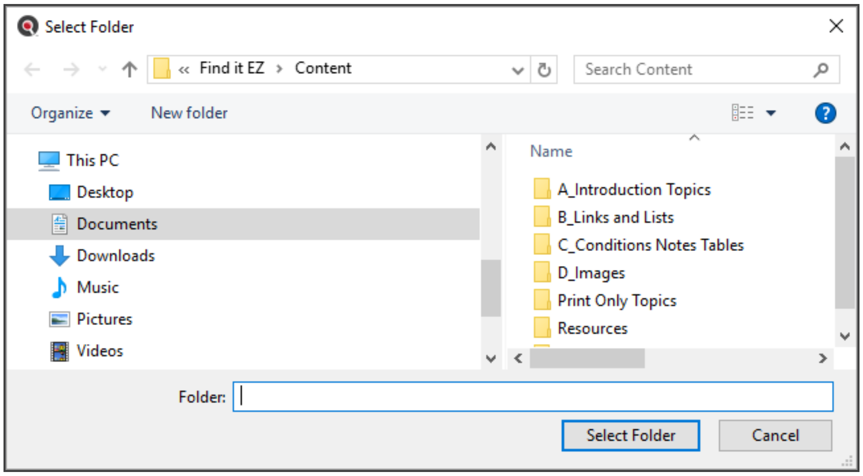
Add or Edit Search Path(s)

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** dialog will appear, as below:



3. Click on the folder icon button to the right of the **Directory** field. A **Select Folder** dialog will appear. See example below:



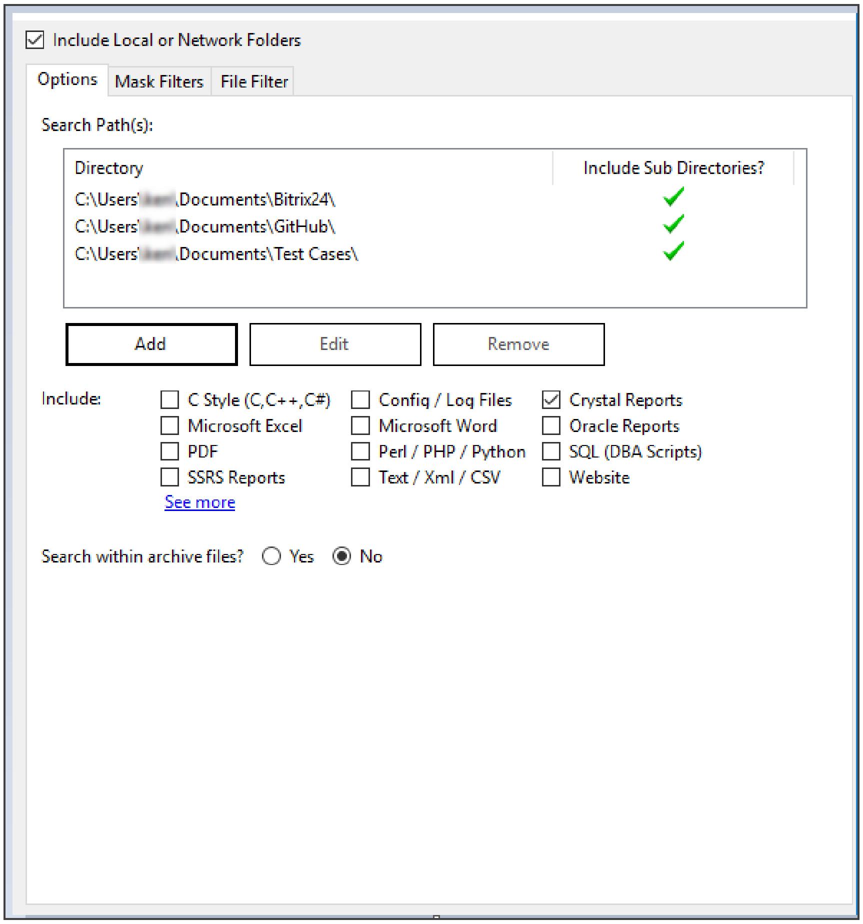
   a. Navigate to and select the folder you want to add as a search path.

   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:



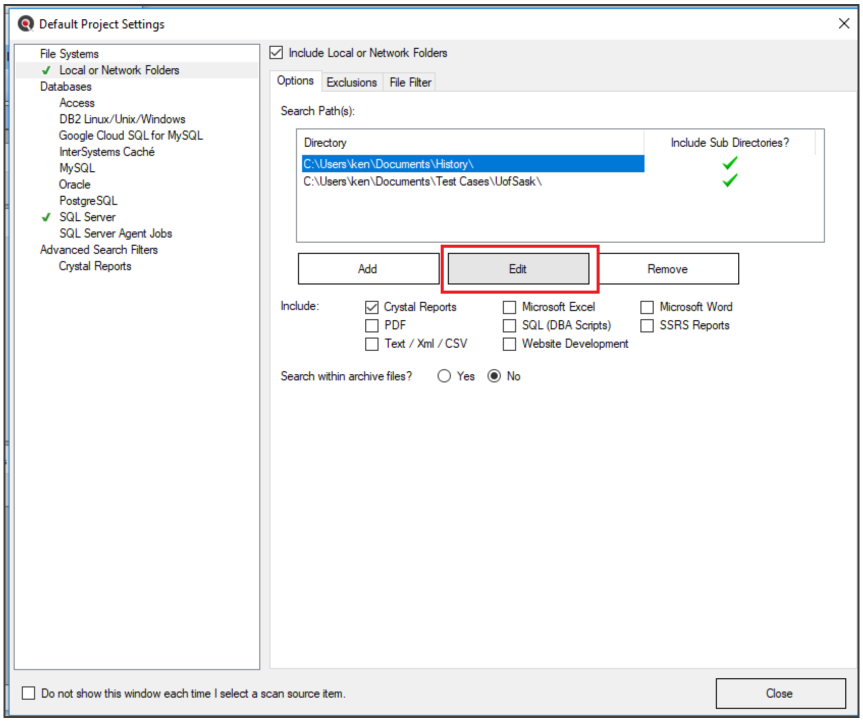
Note: If sub directories have been included for a given search path, a green check mark appears in the corresponding **Include Sub Directories?** column.

Alert: You will be prevented from entering duplicate paths or overlapping 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:

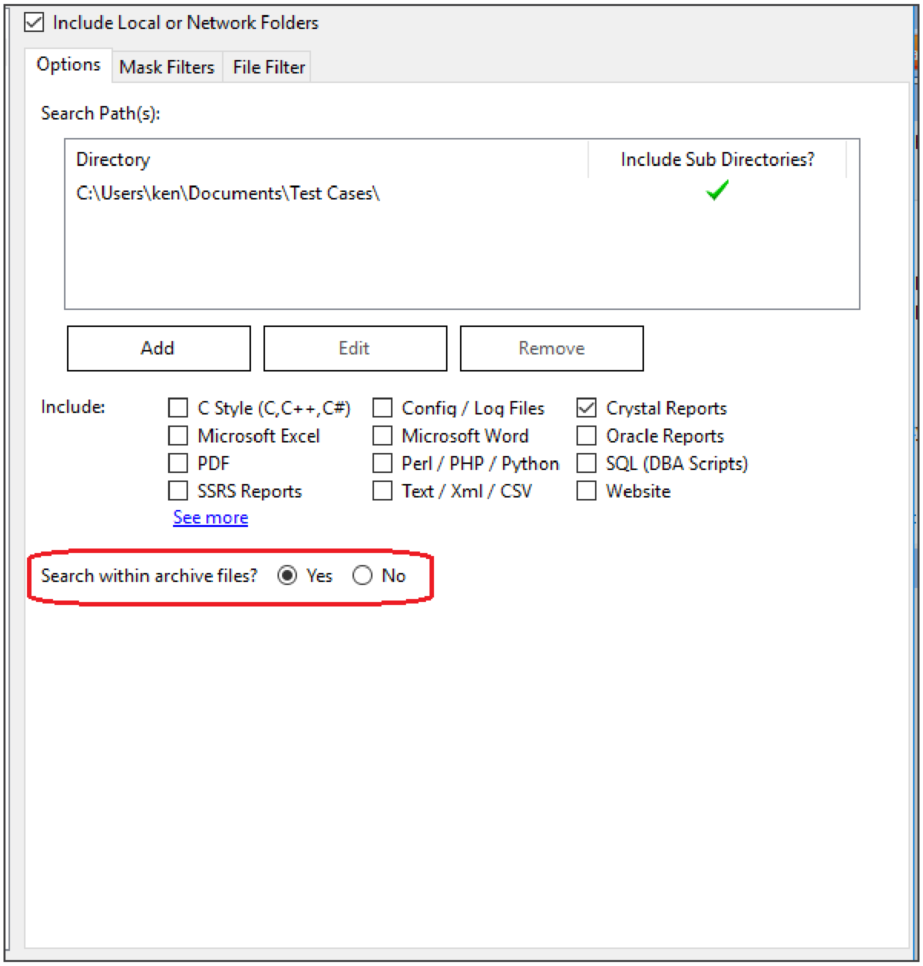
1. In the **Search Path(s)** list, click to highlight the search path you want to remove.
2. Click on the **Remove** button. The selected search path will be removed from the list.

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"

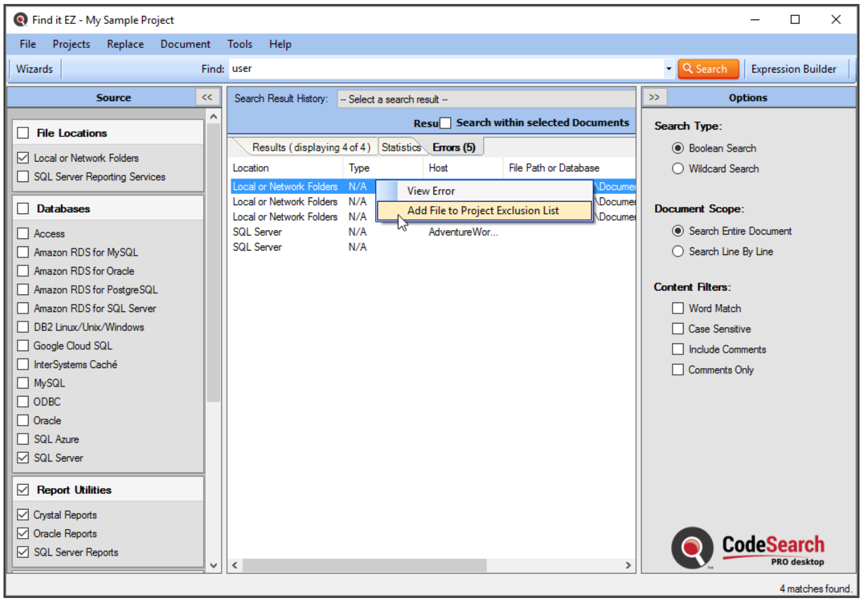


To include archive files in your Local or Network Folders search, locate and click the **Yes** option to **Search within archive files**.

Exclude Files or Folders

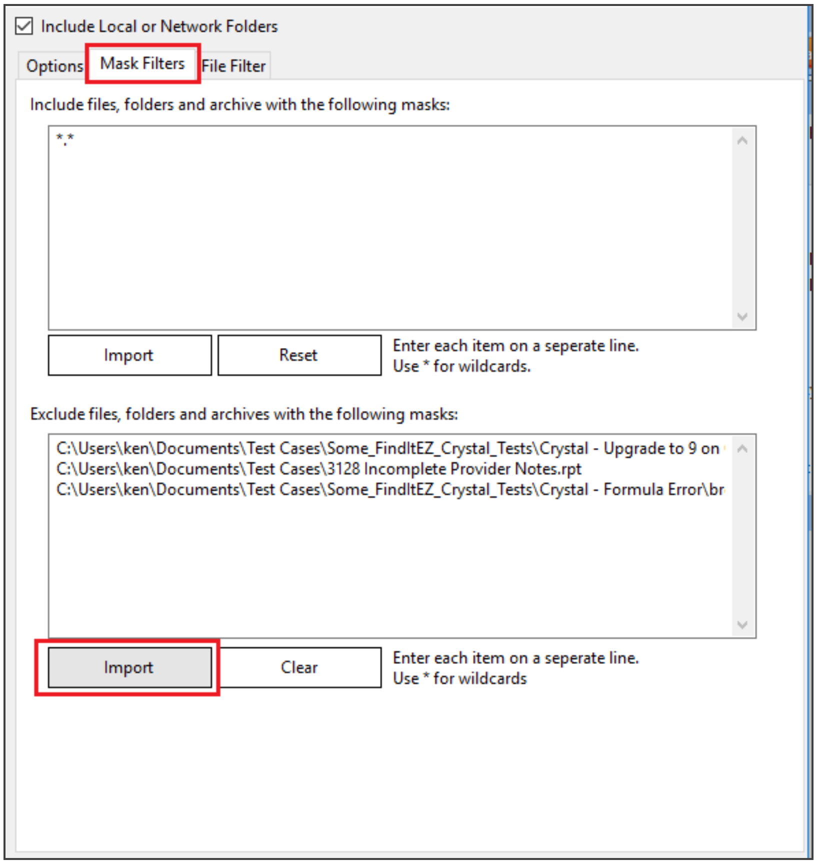
There are three ways to add one or more specific files or folders to be excluded from the selected directories (in the **Search Path(s)** list) in your Local or Network Folders search:

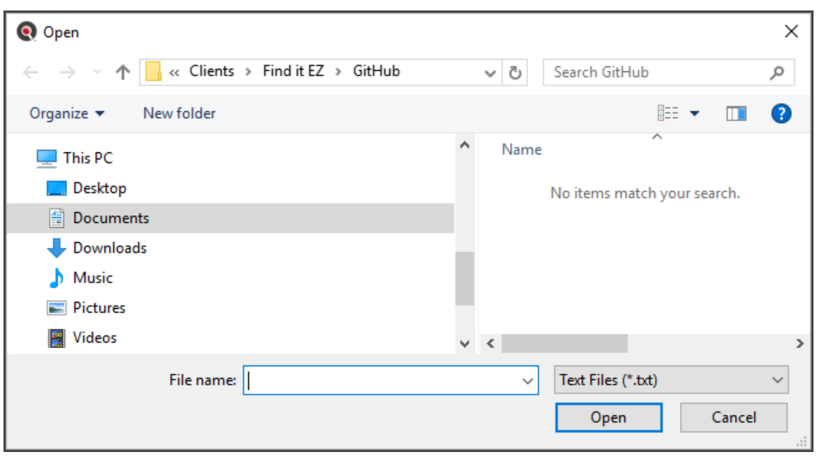
1. Right-click a search results item in the **Errors** tab, chose ***Add File to Project Exclusion List*** from the context menu. See below:



2. To import a list of files to exclude:

   a. In the **`Exclude files, folders and archives ...`** section of the **`Mask Filters`** tab, click on the **Import** button. An **Open** dialog will appear.





b. Navigate to and select the desired *.txt file.

c. Click on the **Open** button. The contents of the selected file will be added to the in the **`Exclude files, folders and archives ...`** 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 files, folders and archives ...** 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:

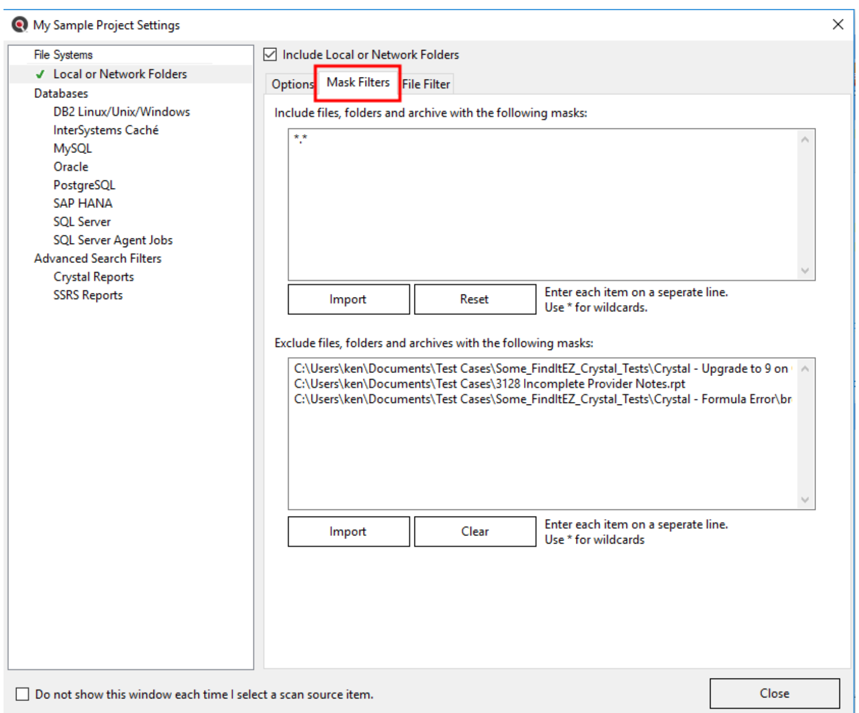
- Click on the **Clear** button. All items in the list will be removed.

Include File Filters

You may use both the **Mask Filters** and/or the **File Filter** tabs 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 positives 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.

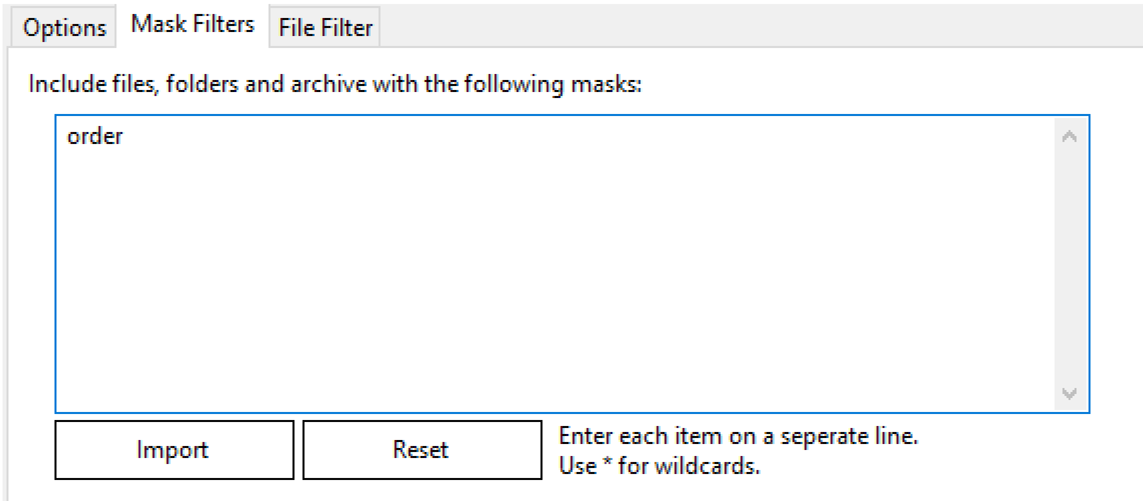
To include one or more files and/or folders based on a wildcard or pattern that matches part of a file or path name:

1. Open the **Local or Network Folders** project settings dialog box, click to open the **Mask Filters** tab, see below:

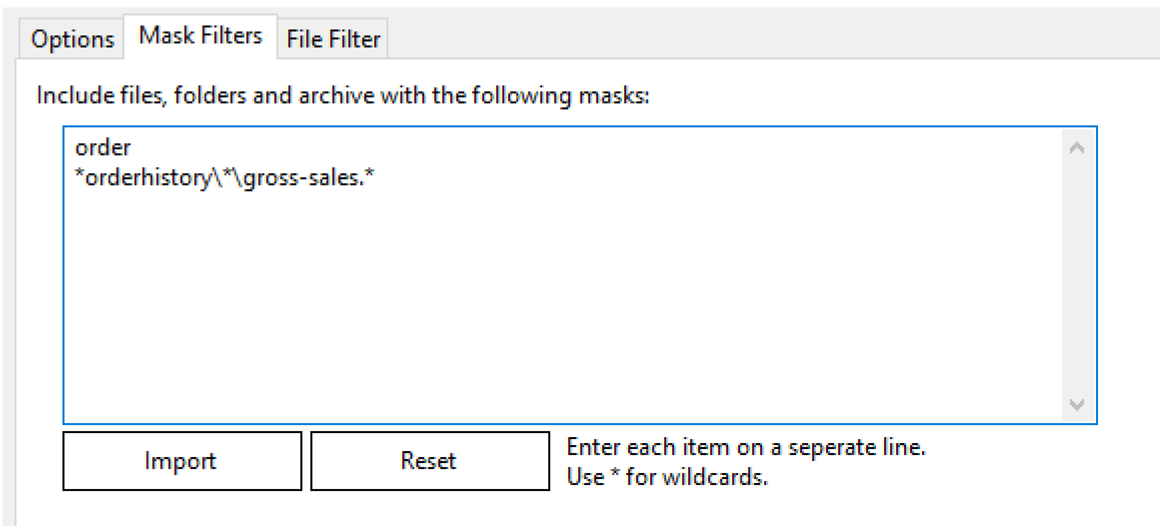


2. By default, all paths and filenames within the **Options** tab **Search Path(s)** are included using the wildcard pattern ***.*** .

3. To only include the subset of files containing the text "order" in either the folder path or filename itself, replace the default `*.*` pattern with the text `order`, or `*order*` , as below:



4. To also include any files in a subset of paths such as order history sales report stored by date as follows "..\orderhistory\yyyy-mm\gross-sales.rpt", enter the pattern `*\orderhistory\*\gross-sales.*` , as below:



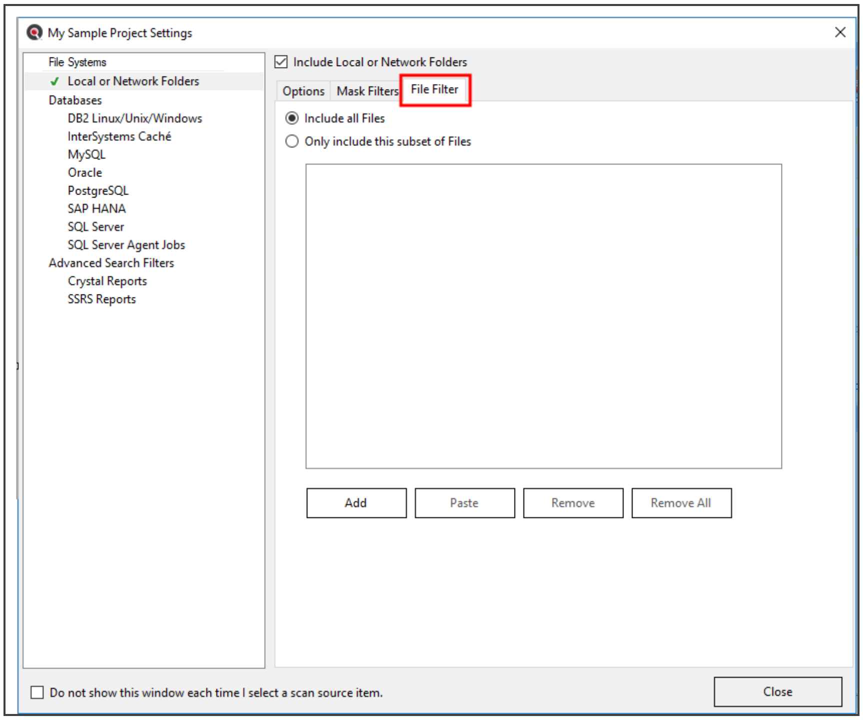
5. Repeat adding additional patterns on separate lines as needed, or use the **Import** button below to import a list of patterns.

> **Note:** The list of "included" patterns is cumulative. In other words, each pattern on a line is "OR"-ed together with all other patterns. As such, leaving the default "*.*" pattern in this box would supersede all individual pattern lines that may be added.

6. To clear the list, use the **Reset** button to restore the default `*.*` pattern (ie, include all).

To include one or more specific fully qualified files by name:

1. Open the **`Local or Network Folders`** project settings dialog box, click to open the **`File Filter`** tab, see below:

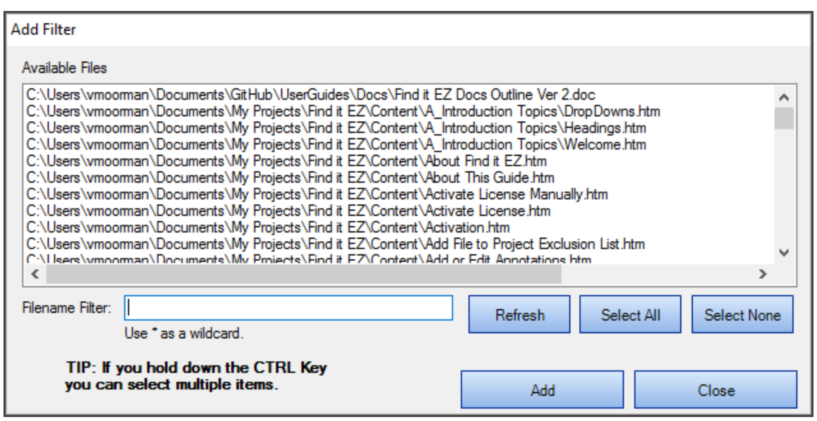


2. To include all files, click to choose the **Include all Files** option. This is the default selection.

   OR

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

   a. Click on the **Add** button. An **Add Filter** dialog will appear.



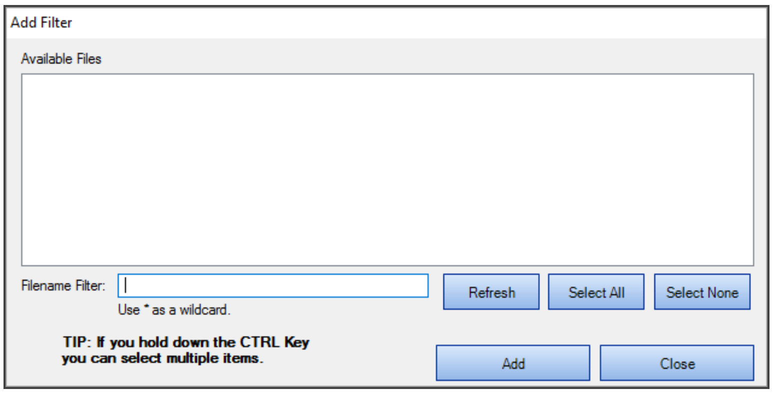
The **`Available Files`** list will be populated with a list of files included in the folders selected previously on the **`Options`** tab, and filtered to include / exclude specific subsets of files based on any entries on the **`Mask Filters`** tab.

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

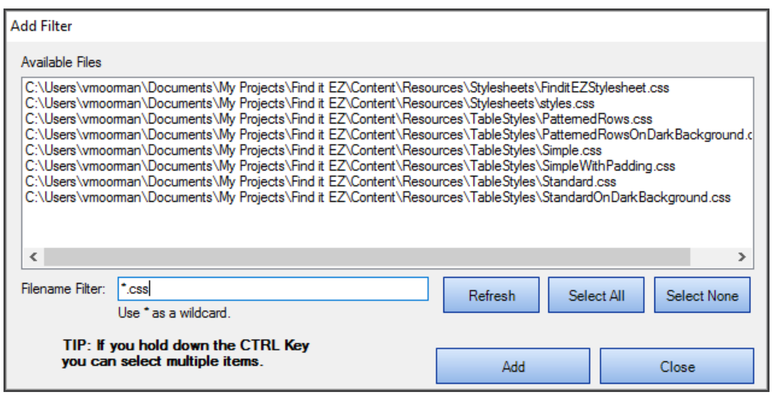
> **Note:** Select multiple items by holding down the **Ctrl** key. Or, click on the **Select All** button or the **Select None** button, or the **Refresh** button as desired.

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 path names.

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

5. 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.

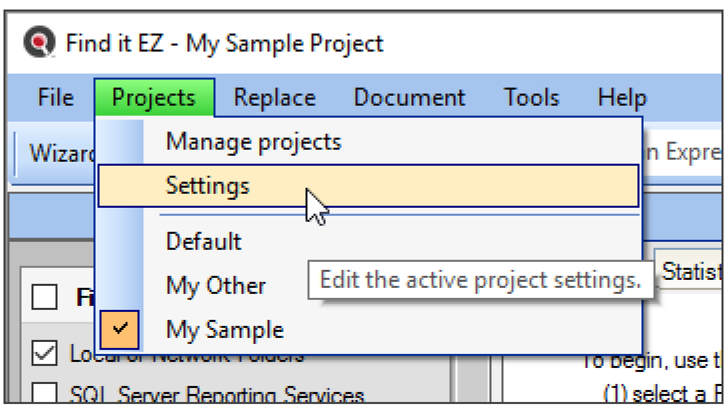
   Alert: The clipboard may contain a single file or list of filenames, but each line must be formatted with a fully qualified path.
6. To remove file(s):
   a. To remove all files from the list, click on the **Remove All** button.
   b. To remove only selected file(s) from the list, click to select the files you want to remove, then click on the **Remove** button.
7. Click on the **Close** button to apply your changes.

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.

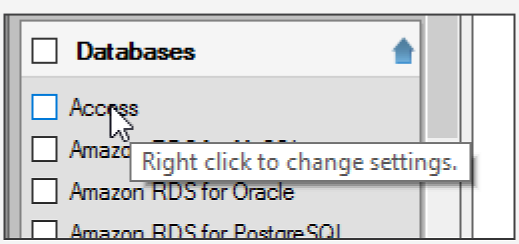
To access project settings for databases:

1. Edit the active project using the ***Projects -> Settings*** menu.

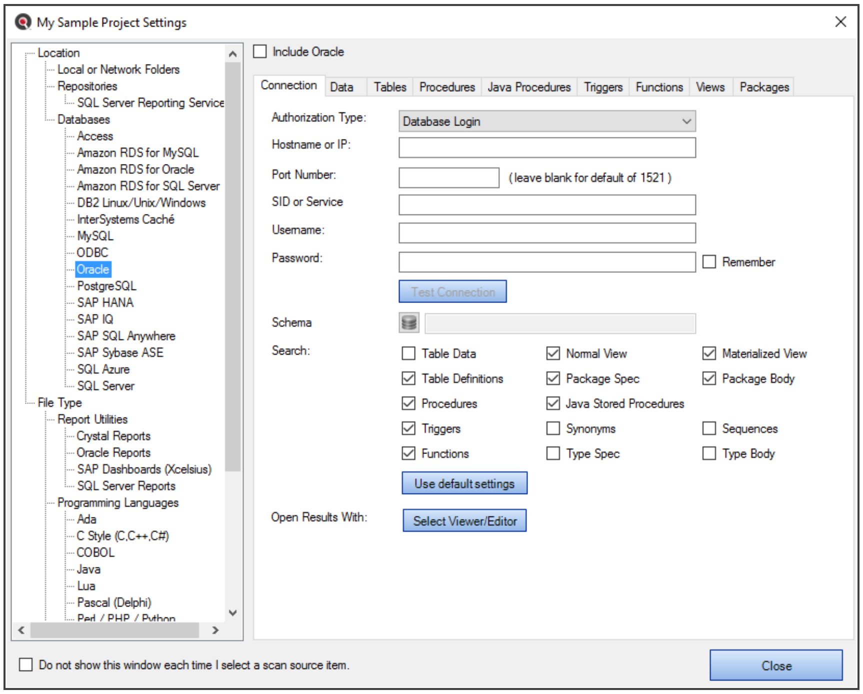


2. In the frame on the left, in the **Location** category, locate the **Databases** sub category.

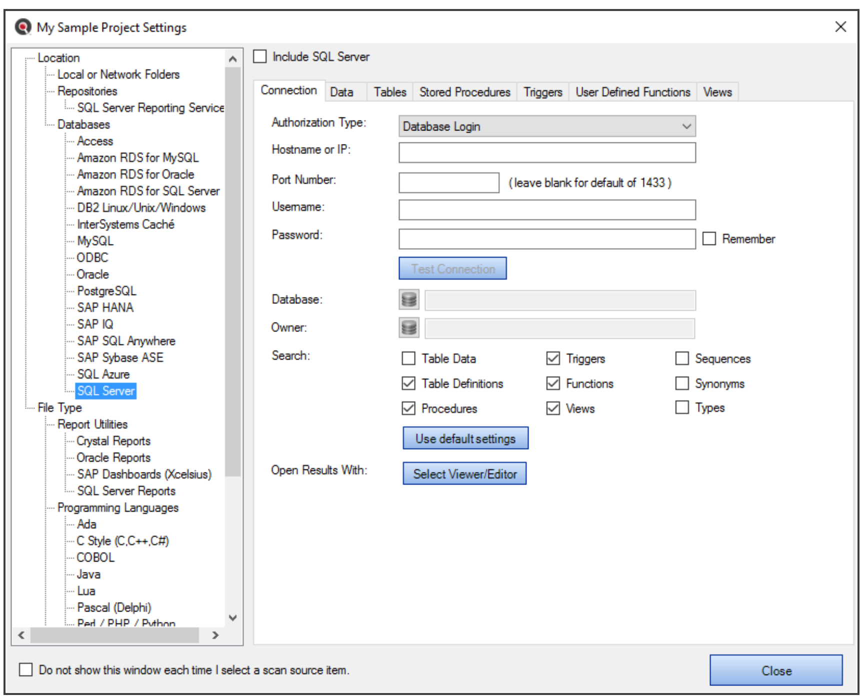
   Note: You may access the same dialog box with a simple right-click on the desired database in the expanded **Source** panel on the left of the main application screen.



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.

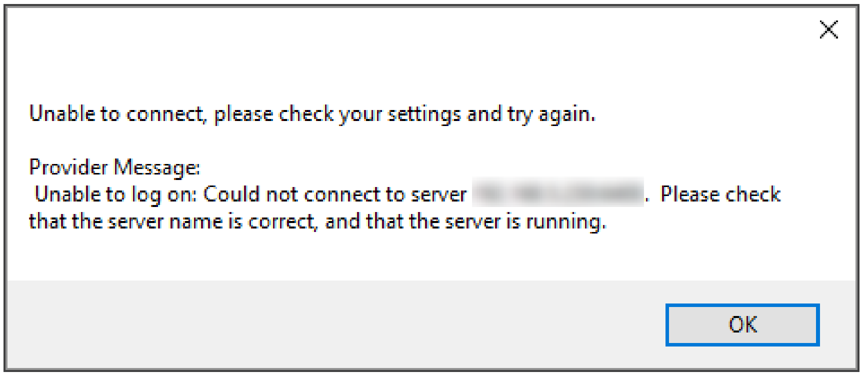
Test Database Connection

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

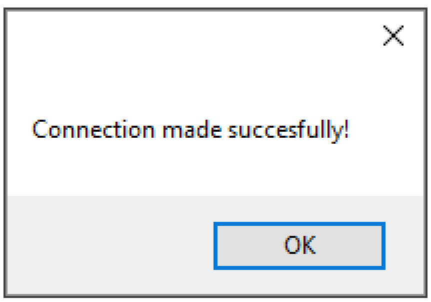
1. If the test is unsuccessful, you will receive an "Connection failed!" message, along with a Reason. Check your settings and try again.

   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

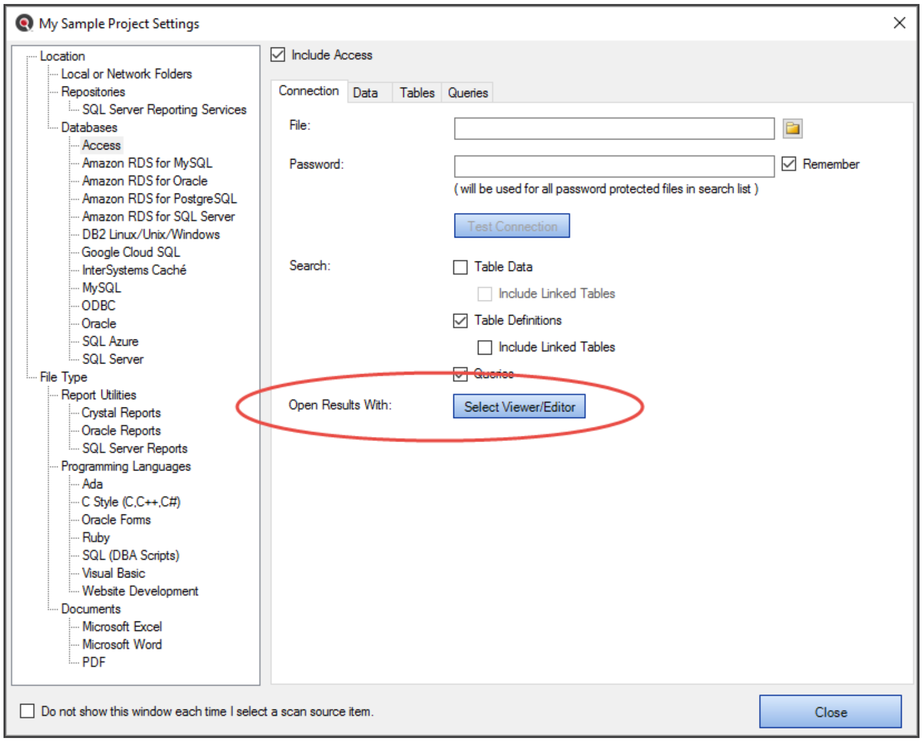
On the database **Connection** tab or BI Reports **Options** tab (see links below), the **Search** section contains a number of items for which you can search. To include a set of database objects, select an item and click to check the preceding check-box.

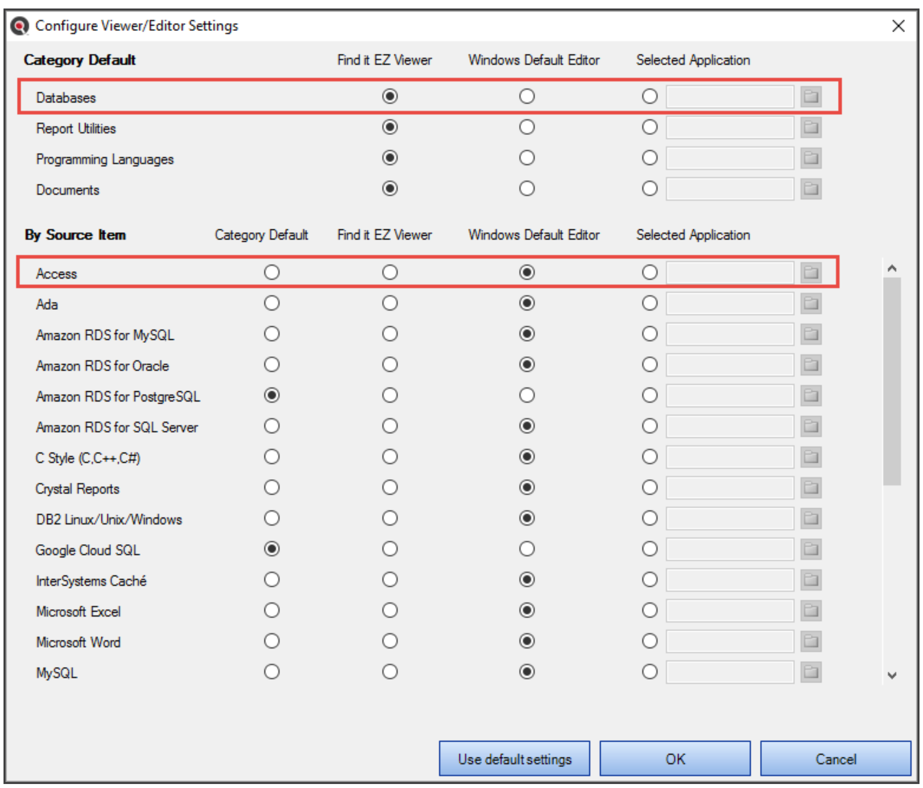
For each database type, there is a set of default database objects normally used for code change impact analysis. To restore the selections to the default settings that came with your Find it EZ install, click on the **Reset search defaults** button. This will also reset all individual database object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


My Sample Project Settings
Location
Local or Network Folders
Repositories
SQL Server Reporting Services
Databases
Access
Amazon RDS for MySQL
Amazon RDS for Oracle
Amazon RDS for PostgreSQL
Amazon RDS for SQL Server
DB2 Linux/Unix/Windows
Google Cloud SQL
InterSystems Caché
MySQL
ODBC
Oracle
SQL Azure
SQL Server
File Type
Report Utilities
Crystal Reports
Oracle Reports
SQL Server Reports
Programming Languages
Ada
C Style (C,C++,C#)
Oracle Forms
Ruby
SQL (DBA Scripts)
Visual Basic
Website Development
Documents
Microsoft Excel
Microsoft Word
PDF
Include Access
Connection
Data
Tables
Queries
File:
Password:
Remember
(will be used for all password protected files in search list)
Test Connection
Search:
Table Data
Include Linked Tables
Table Definitions
Include Linked Tables
Queries
Open Results With:
Select Viewer/Editor
Do not show this window each time I select a scan source item.
Close


Configure Viewer/Editor Settings
Category Default
Find it EZ Viewer
Windows Default Editor
Selected Application
Databases
Report Utilities
Programming Languages
Documents
By Source Item
Category Default
Find it EZ Viewer
Windows Default Editor
Selected Application
Access
Ada
Amazon RDS for MySQL
Amazon RDS for Oracle
Amazon RDS for PostgreSQL
Amazon RDS for SQL Server
C Style (C,C++,C#)
Crystal Reports
DB2 Linux/Unix/Windows
Google Cloud SQL
InterSystems Caché
Microsoft Excel
Microsoft Word
MySQL
Use default settings
OK
Cancel

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

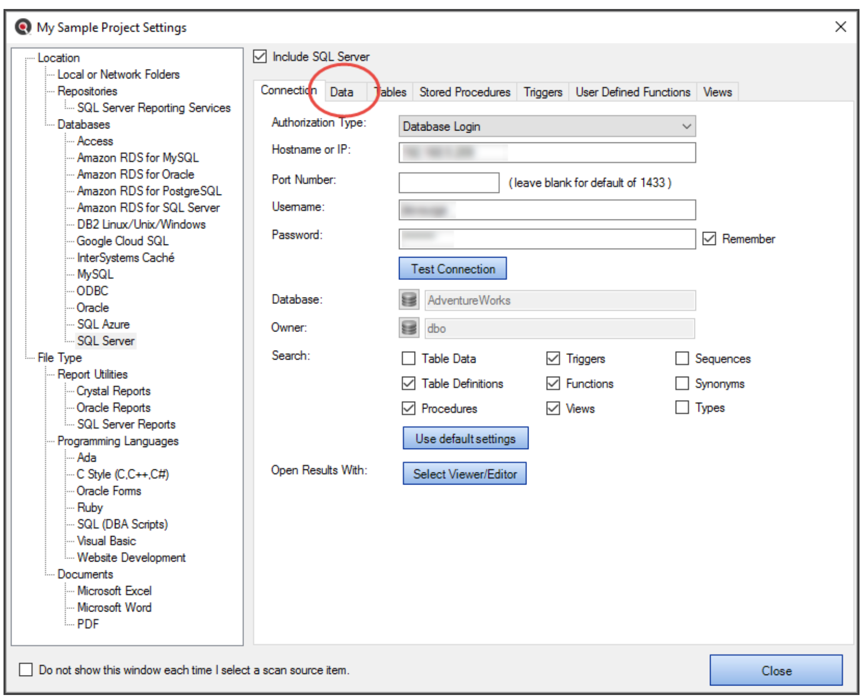
Each of these tabs allow you to select between including all corresponding database object items, or only specific subset of items. This allows you to expedite the subsequent (re)indexing process as well as reduce false-positive matches in your search results.

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

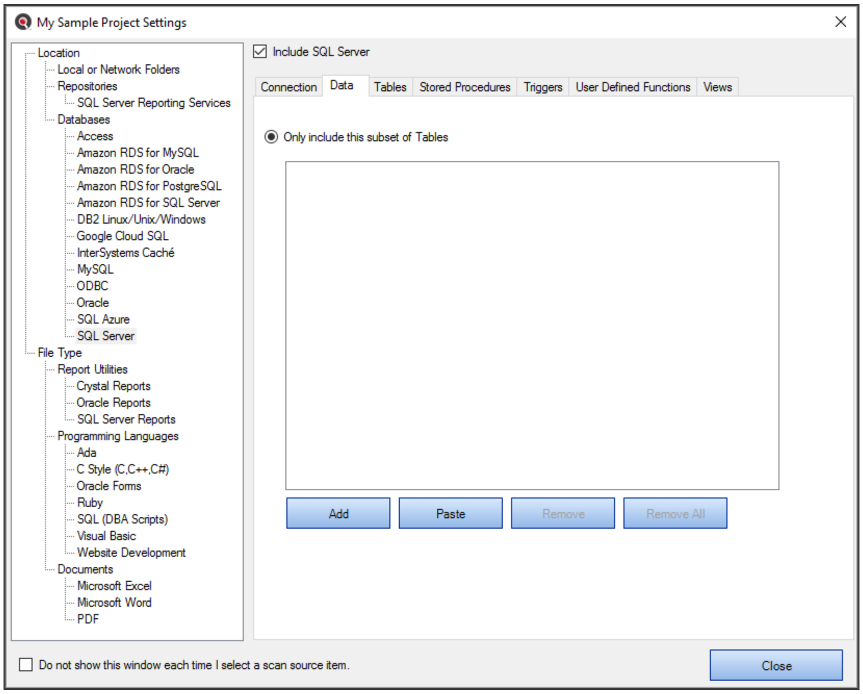
You may use the **File Filter** tab to include only a subset of specific files within the configured path(s). You must first add the desired source path folders. This filter is often used to minimize false positives or expedite indexing and searching by limiting the number of file contents included in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

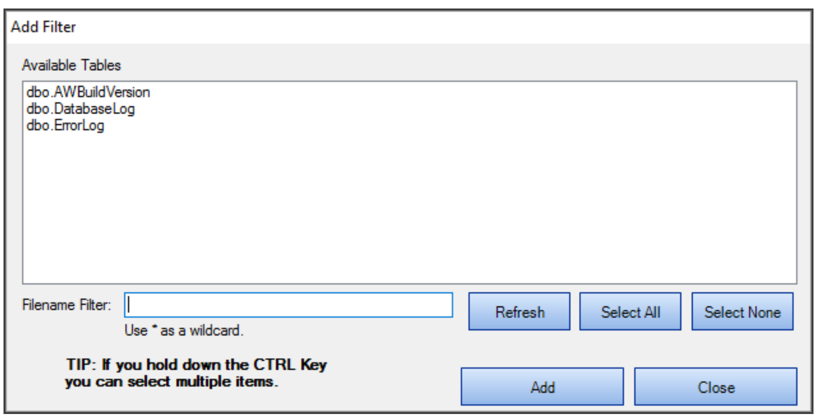


2. Click to select the desired **Data** tab.



3. To add a subset:

   a. Click on the **Add** button. An **Add Filter** dialog 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 path names.

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.

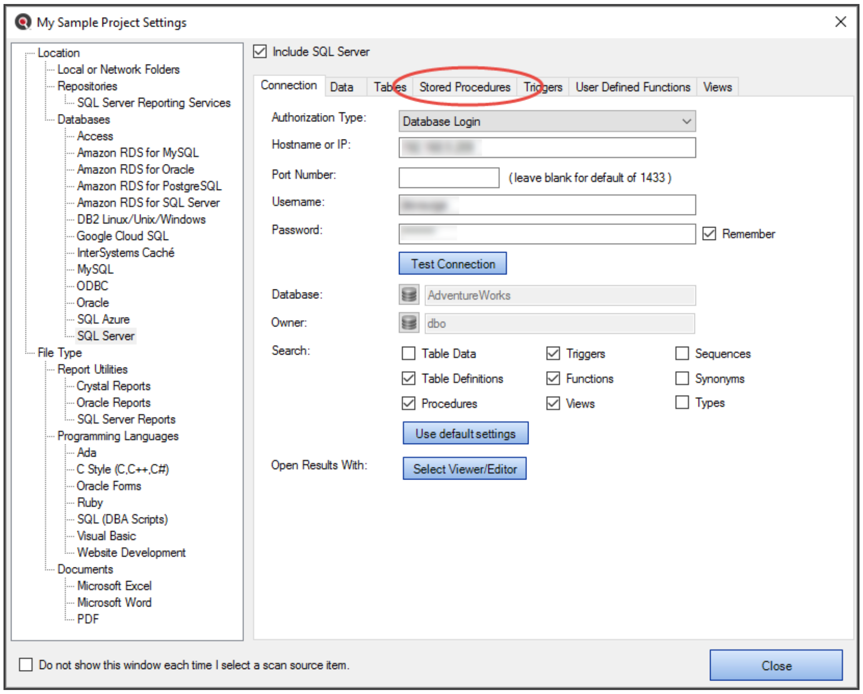
   b. To remove only selected table(s) from the list, click to select the table(s) you want to remove, then click on the **Remove** button.

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

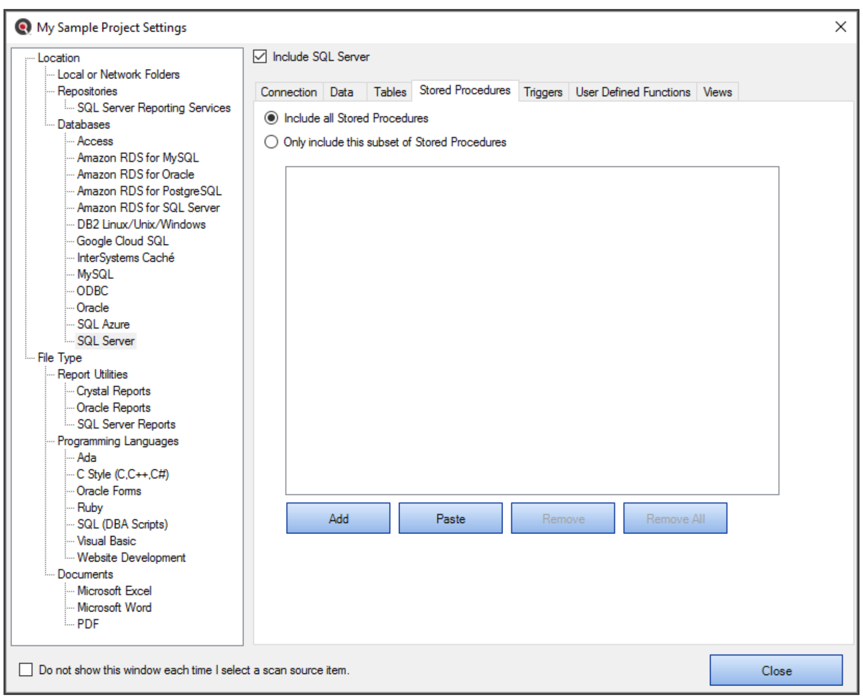
> **Note:** Normally, including database table data is disabled by default. However, in some systems it may be necessary to include searching the contents of some system tables that either contain dynamic programming logic / code, or that may contain type codes or other application related content you 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.

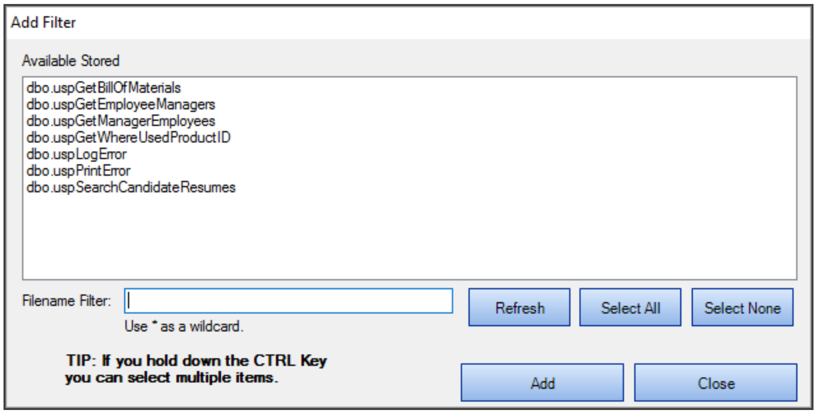


3. To include all stored procedures, click to choose the **Include all Stored Procedures** option. This is the default selection.

   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** dialog will appear.

   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 path names.

   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 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 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:

- "Local or Network Folders" on page 75
- "Viewer / Editor Settings" on page 56
- "BI Reports" below
- "Search an Oracle Database" on page 197
- "Search a SQL Server Database" on page 201

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.

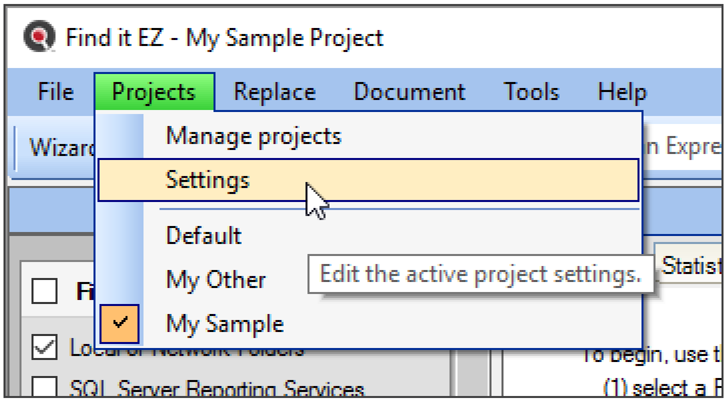
Report files can be physically stored in one of three Locations:

- Local or network folders.
- Report Scheduling database repositories, such as SAP BusinessObjects Enterprise Server or a SQL Server Reporting Services 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 corresponding files can be stored within.

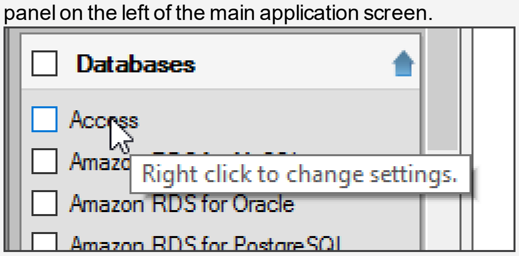
To access project settings for BI Reports:

1. Edit the active project using the ***Projects -> Settings*** menu.

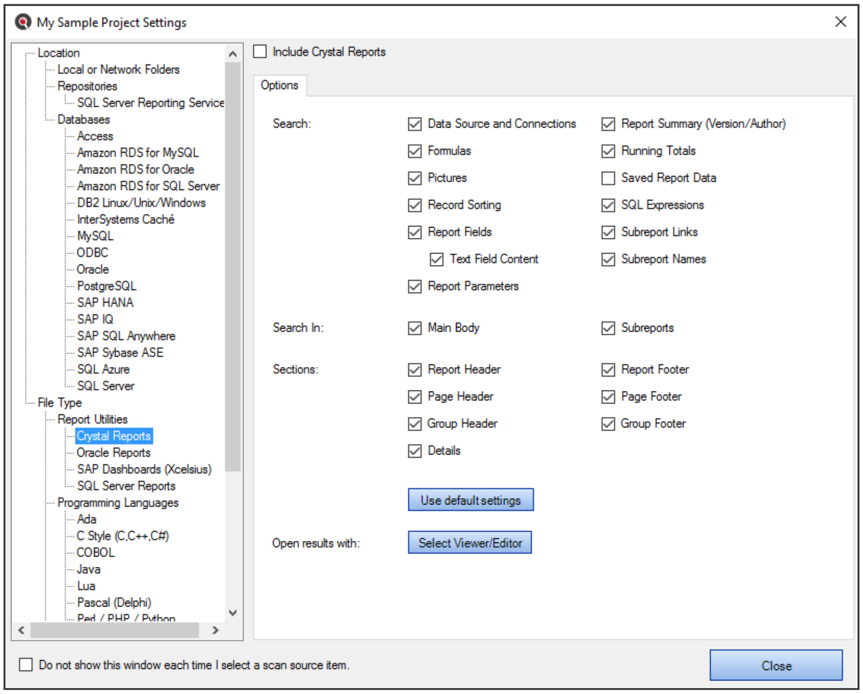


2. In the frame on the left, in the **File Type** category, locate the **BI Reports** sub category.

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:

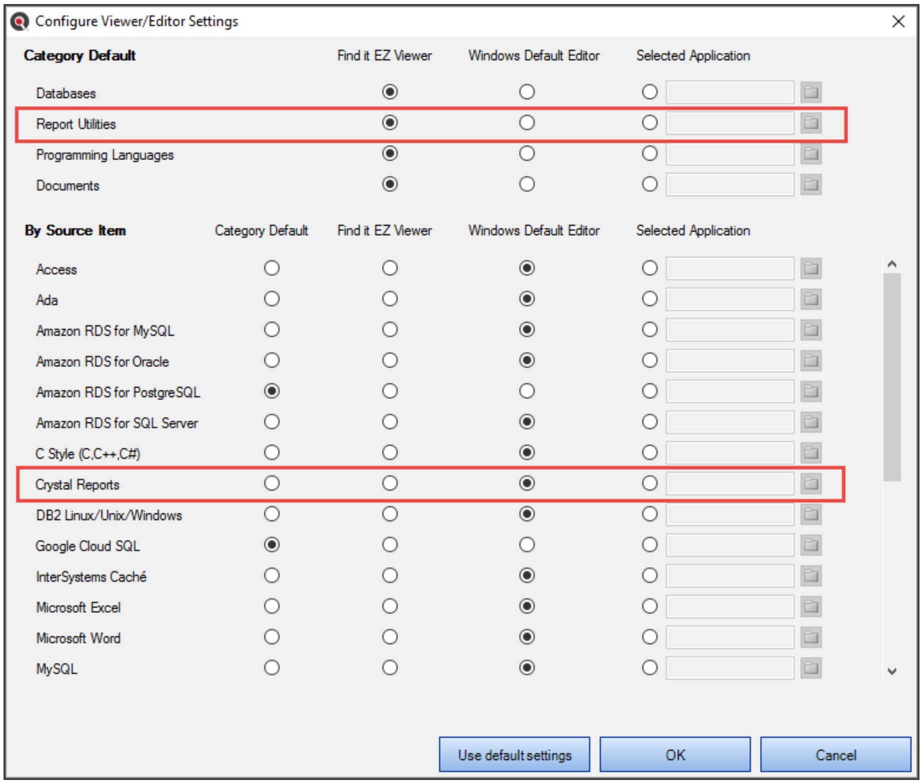


Note: The **Use default settings** button resets the sections and search items to the most common used program settings.

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 56
- "File Locations and Source Settings" on page 73
- "Download Connectors" on page 247
- "Reporting Tools" on page 204
- "Create a Database Cross-Reference List" on page 204
- "Identify reports using a specified connection" on page 222
- "Find text in a text box in a Crystal Report" on page 226

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.

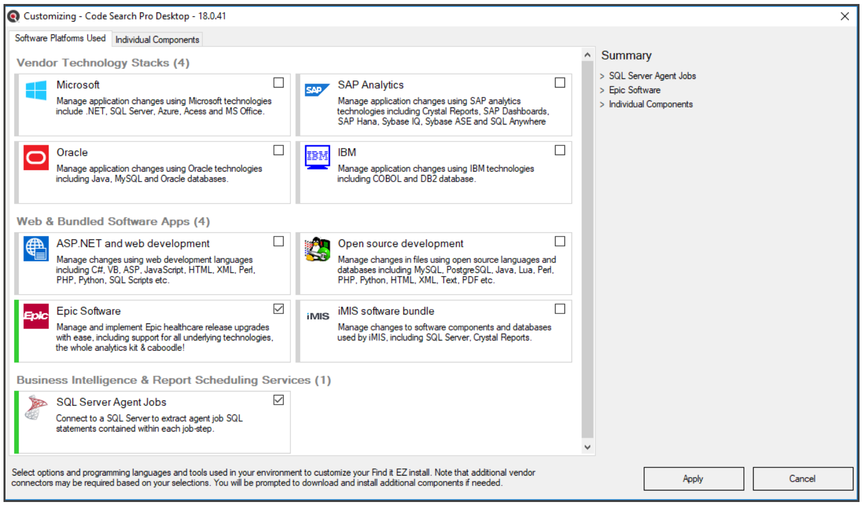
Programming language source code files can be physically stored in one of two Locations:

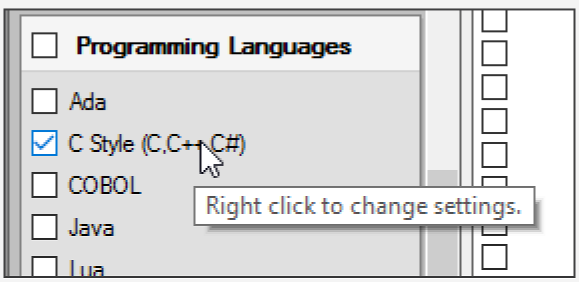
- Local or network folders.
- Version control system repositories, such as git, TFS, etc.

To include selected programming language source code files in a Project, you must select and configure one or more of the possible locations these corresponding files can be stored within. You must also include the programming languages in the **Customization Wizard**.

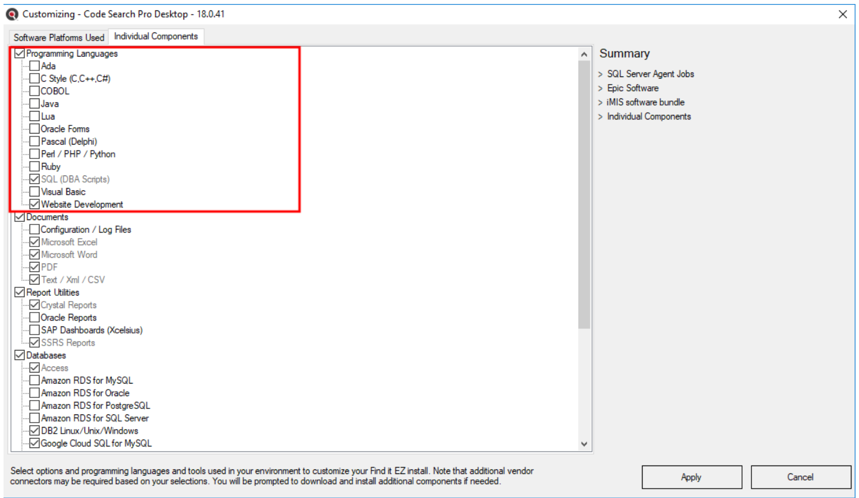
To include the programming languages used in your development environment:

1. Select (enable) the applicable vendor technology stacks, web & bundled software apps on the `Software Platforms Used` tab via the main menu ***Tools -> Customize -> Source***:

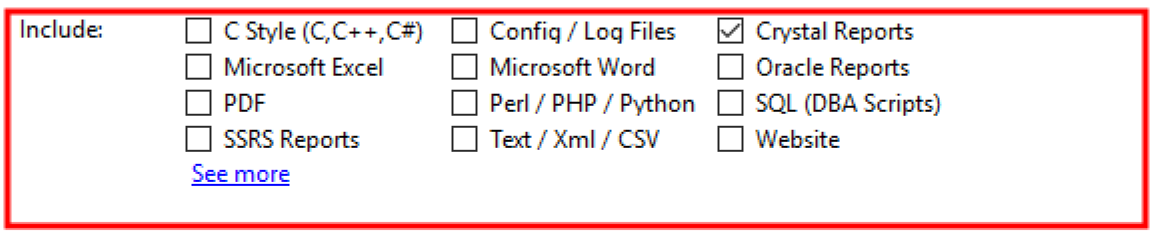


> **Note:** You may access the same dialog box with a simple right-click on the desired programming language in the expanded **Source** panel on the left of the main application screen.
>
> 
>

2. Or click on the `Individual Components` tab, locate the **Programming Languages** sub category.



3. Click on the desired programming language(s), then click on the **Apply** button to show / hide these available source document types within the `Include` sections of the corresponding source location **Options** tabs in the **Project Settings** configuration dialog. See below for example:



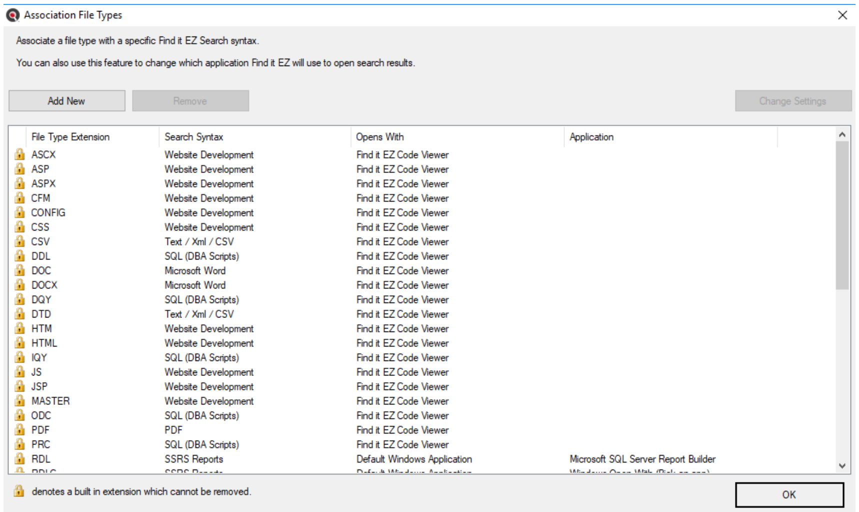
> **Note:** The `See more` link located at the end of the **Include** lists, when clicked, auto refreshes the list of available items to include the "hidden" but available source items. When a "hidden" item is checked, it will become visible going forward on the **Source** panel on the main screen and automatically be included in your custom program settings.

4. Refer to **See Also** links below for more info on managing project settings.

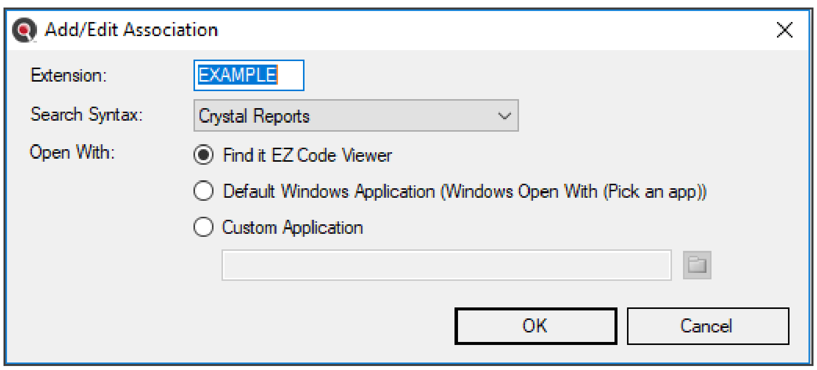
Add or Remove File Extensions Searched

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 new custom file type, from the main menu ***Tools -> Customize -> Association File Types***



   a. Click on the **Add New** button. A dialog will appear (as below).



   b. Enter the name of the new file extension (without the leading ".").

   c. Select the desired programming language **`Search Syntax`** to be applied to contents of documents using this file type extension.

> **Alert:** You may only associate (add) unique custom filename extensions to one or more programming language. So, for example, if you wanted to associate the file extensions "sam" to be parsed as a Java file, and / or a C# file, you can add the same file type "sam" selecting each search syntax you would like it parsed with. However, this may produce duplicate search results for each search syntax with the same file and is not recommended.

   d. Chose an **`Opens With`** viewer / editor.

   e. Click on the **OK** button. The new file extension will be added to the **File Type Extension** list.

2. To remove a file extension:

   a. In the **File Type Extension** 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 **OK** button.

See Also:

- "Search Wizard" on page 115
- "Projects" on page 69
- "Viewer / Editor Settings" on page 56
- "File Locations and Source Settings" on page 73

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).

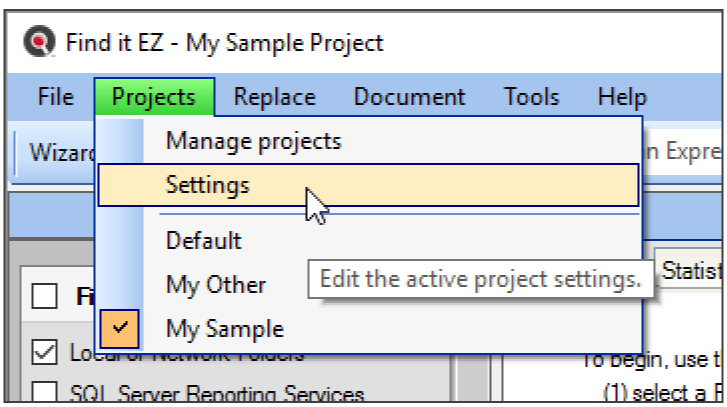
Application logs, data files and office documents can be physically stored in one of two Locations:

- Local or network folders.
- Version control system repositories, such as git, TFS, etc.

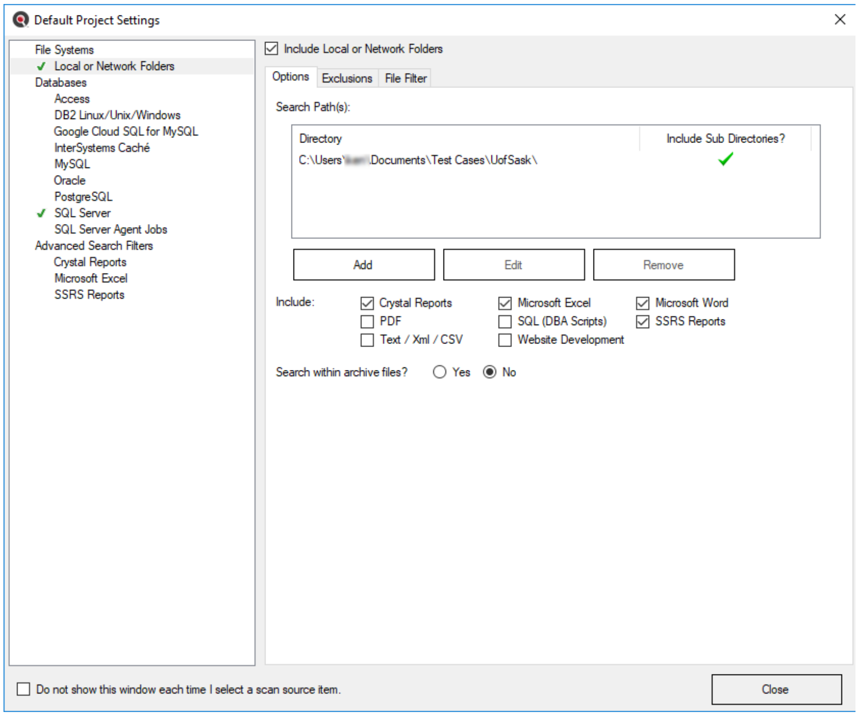
To include selected documents in a Project, you must also select and configure one or more of the possible locations within which these corresponding files can be stored.

To access project settings for documents:

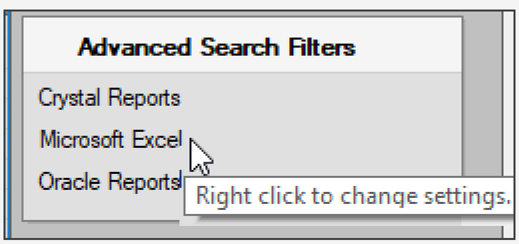
1. Edit the active project using the ***Projects -> Settings*** menu.



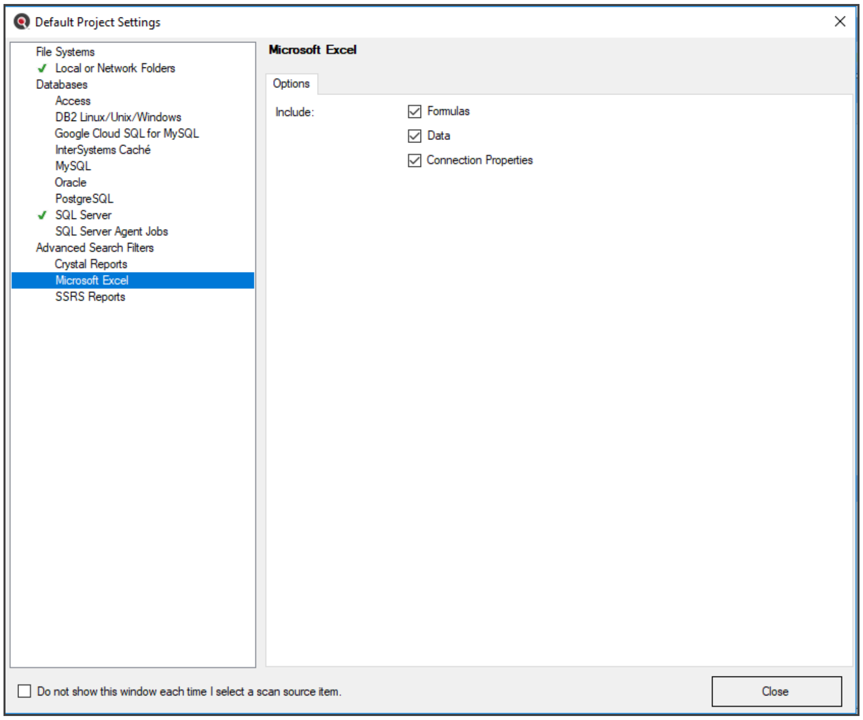
2. A Project Settings dialog window will appear as below.



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.



4. In the tree list on the left, locate the **Advanced Search Filters** sub category.
3. Click on the desired document type. In the example below, we have selected the **Microsoft Excel** document type:



Microsoft Excel Search Options

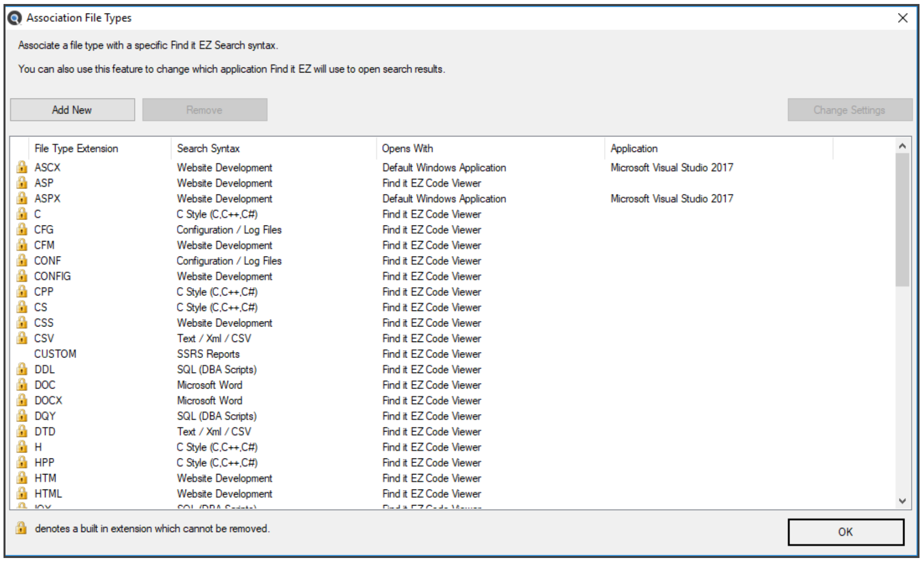
Note that when the **Microsoft Excel** source is selected, you are able to select from the following **Search** options to optimize search performance and reduce false-positive matches:

- **`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).

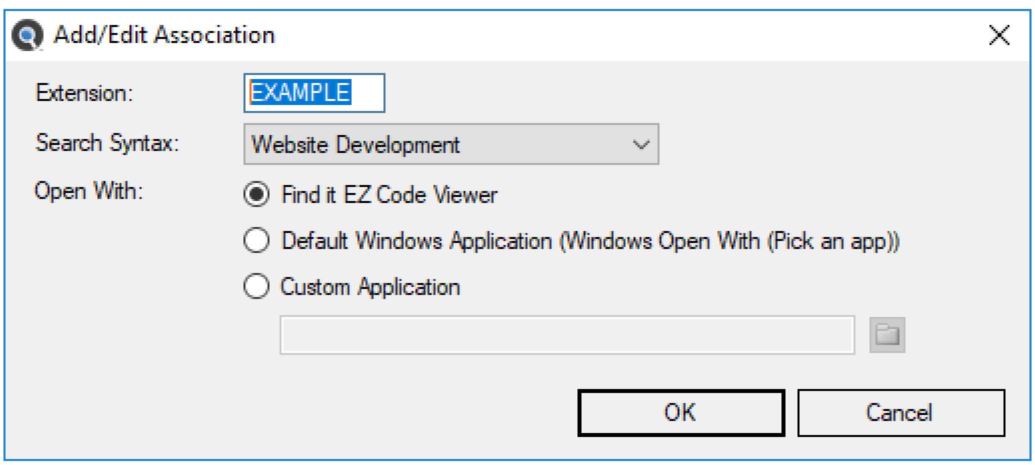
Add or Remove File Extensions Searched

You may add custom file type extensions to be searched using the ***Tools -> Customize -> Associate File Types*** menu, which will launch the **Associate File Types** dialog as below:



1. To add a file extension (where applicable):

   a. Click on the **Add New** button. A dialog will appear (see below).



   b. Enter the name of the new file extension (without the leading ".").

   c. Select the `Search Syntax` applicable to the contents of files saved with this extension.

   d. Chose an `Open With` option to associate your preferred file viewer / editor with this new extension. The default is the built-in Find it EZ Code Viewer.

   e. Click on the **OK** button. The new file extension will be added to the **Associate File Types** list.

2. To remove a file extension:

   a. In the **Associate File Types** list, click to select the custom 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. These built-in file types are indicated with a lock icon.

3. To apply your changes, click on the **OK** button.

See Also:

- "Viewer / Editor Settings" on page 56
- "File Locations and Source Settings" on page 73

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
- 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.

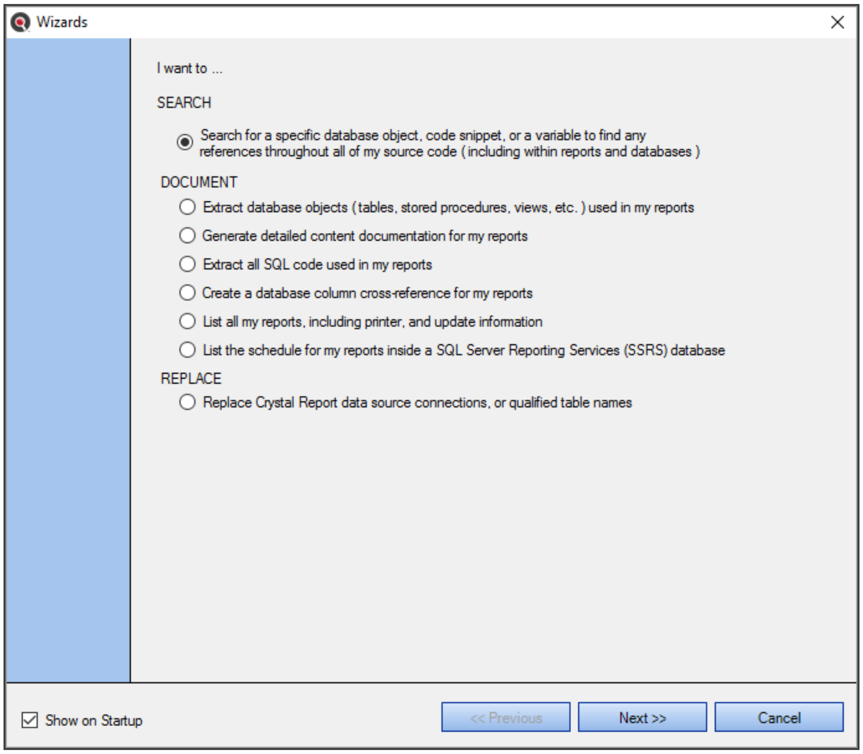
Launch the Wizards

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 **Databases** you want to search.

   b. Click on the **Next** button to continue.

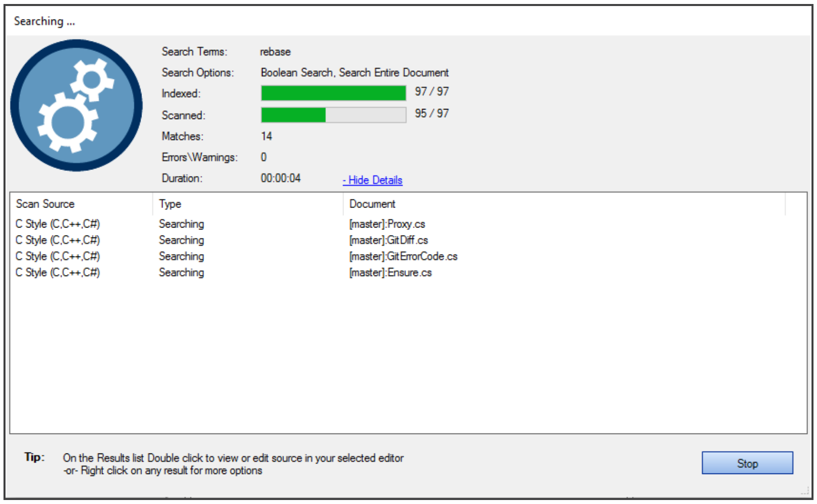
5. Enter connection information for each database.

   > **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.

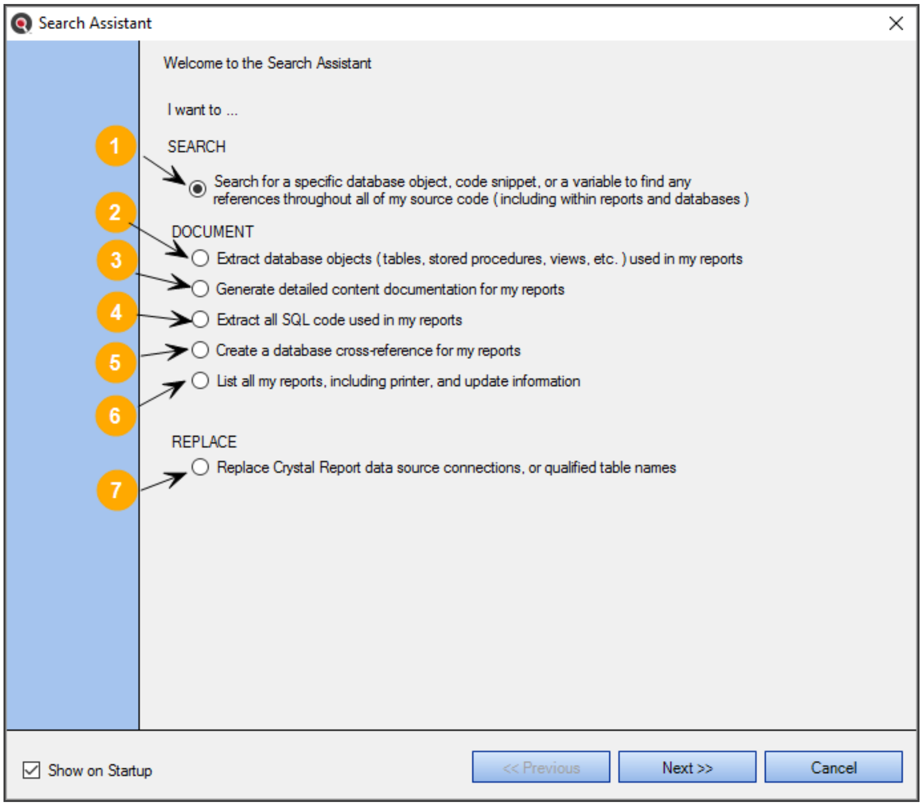
6. Enter your search criteria:
   a. Enter a search term into the **Find** text box.
   b. Click on the **Start Search** button. A search dialog box will appear showing the status of the search.



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	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

#	Wizard	Menu Shortcut	Use Case / Document Produced	Sample Documents
3	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**
4	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**
5	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**
6	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**
7	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).	

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.

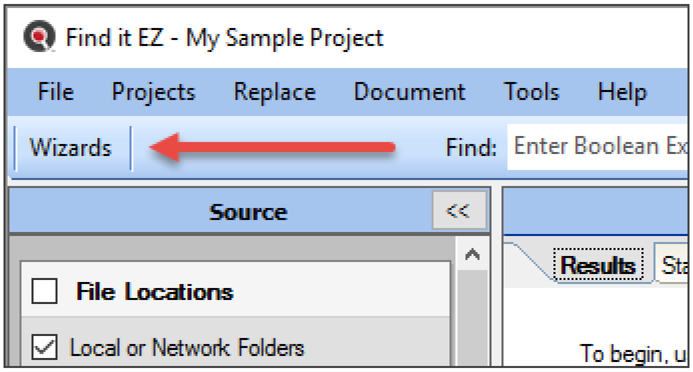
See Also:

- "Perform a Regular Search" on page 135
- "Local or Network Folders" on page 75
- "Use the Expression Builder" on page 140
- "Work With Search Results" on page 150
- "Search Within Result Documents" on page 160
- "Projects" on page 69

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.

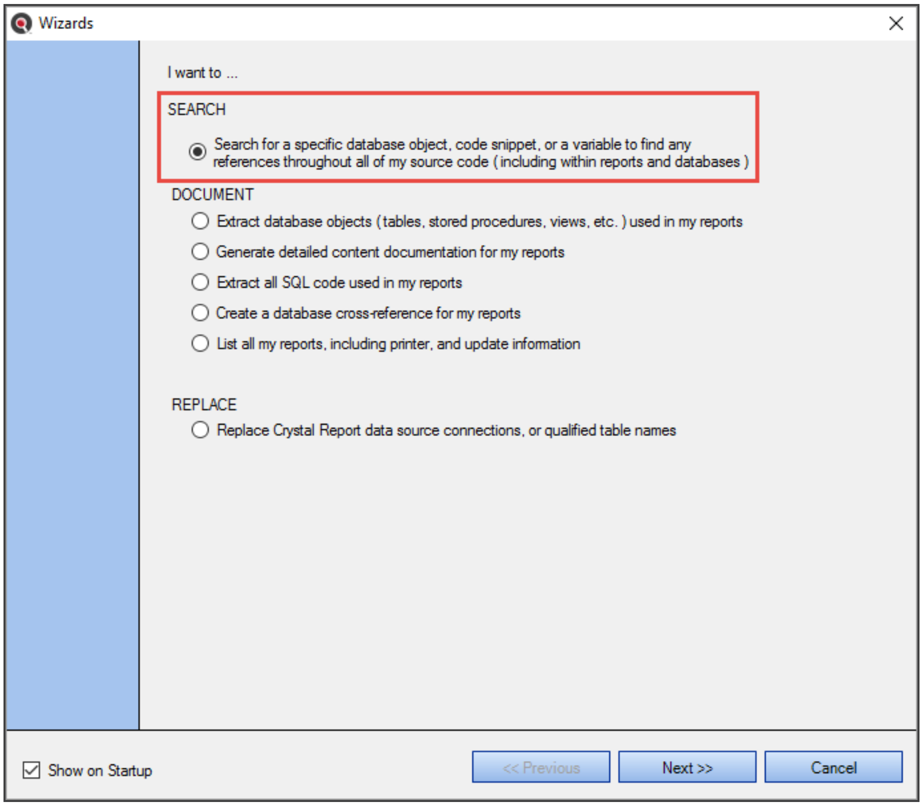
Launch the Search Wizard



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)**



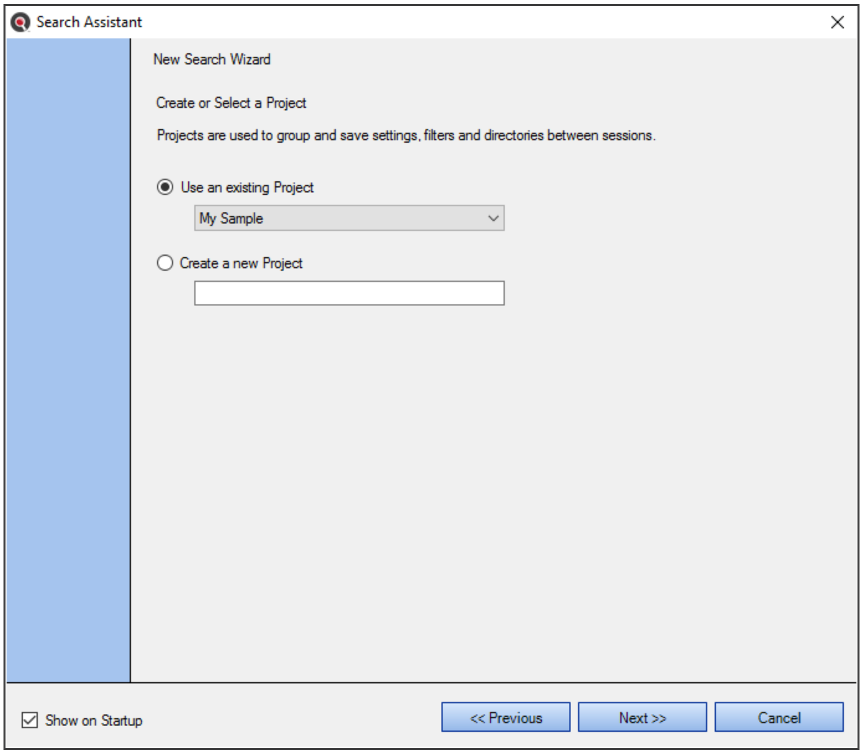
Click on the **Next >>** button to continue.

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 page 115., the following dialog will appear:

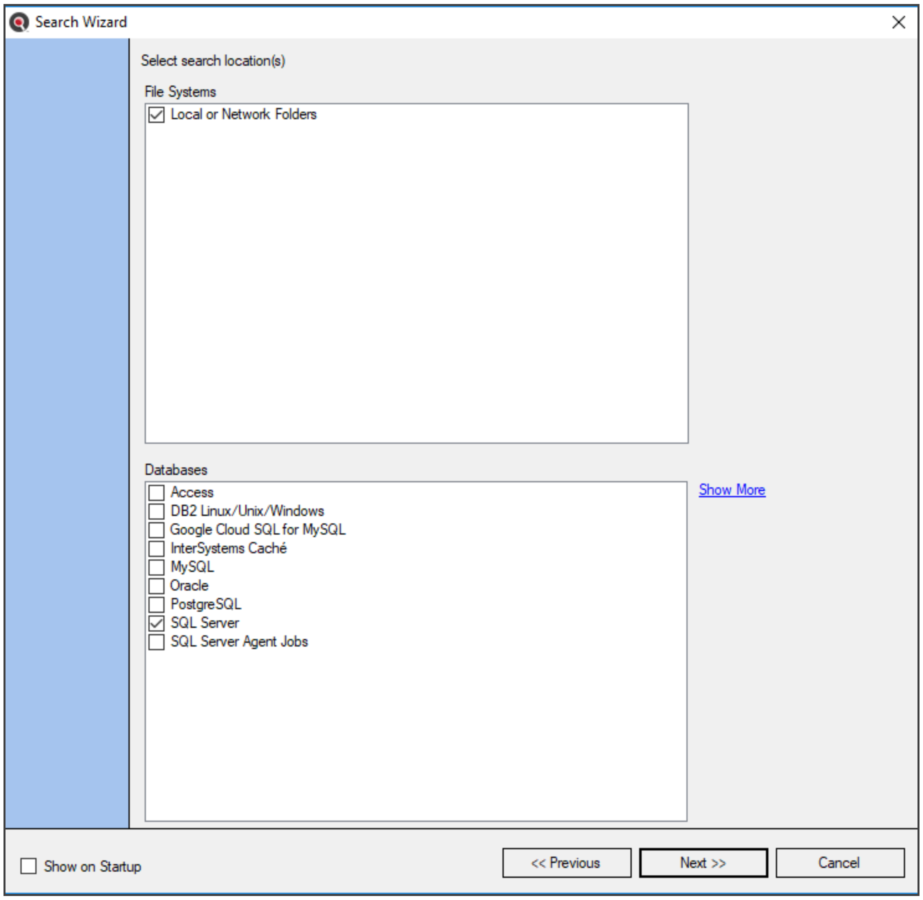


2. To use an existing project for your search:
   a. Click to choose the **Use an existing Project** option (selected by default).
   b. From the project drop-down list, click to select the name of the existing project (i.e. settings) you would like to use for your search.
3. To create a new project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

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 and custom program settings.

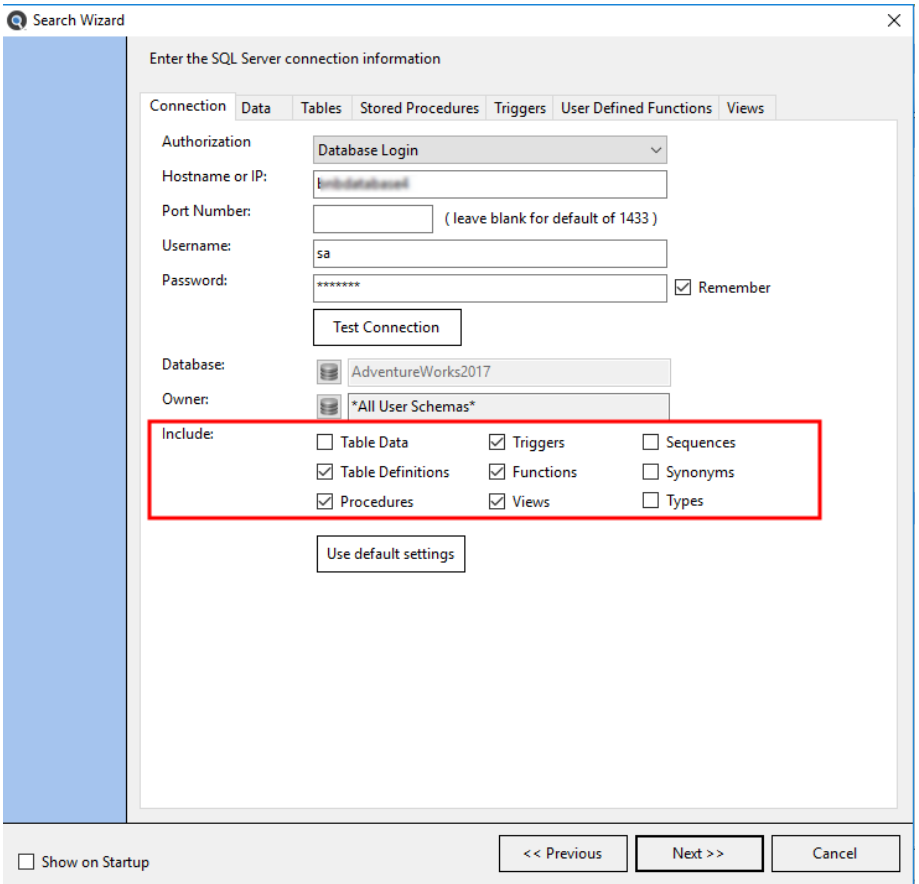


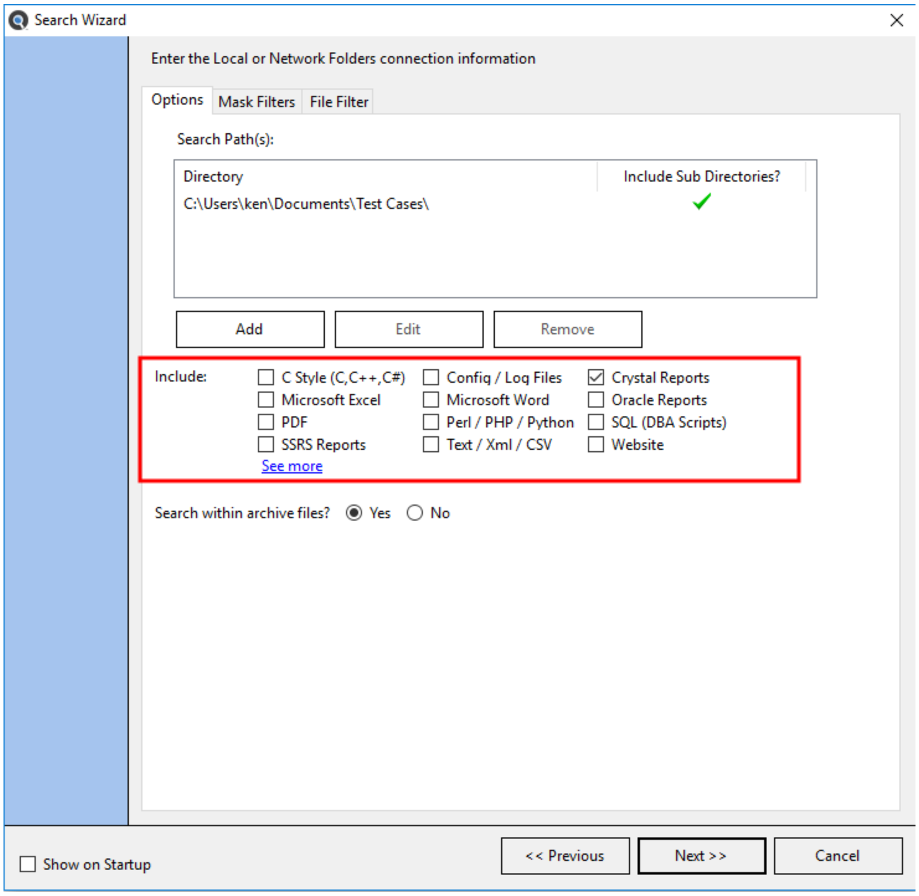
1. In the `File Systems` list, click to select the storage areas within which you want to search.
2. In the **Databases** list, click to select the source database(s) within which you want to search.
3. Click on the **Next >>** button to continue.

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

Enter Connection Information

The following examples are for SQL Server database connections and local or network folders:


Search Wizard
Enter the SQL Server connection information
Connection
Data
Tables
Stored Procedures
Triggers
User Defined Functions
Views
Authorization
Database Login
Hostname or IP:
Port Number:
(leave blank for default of 1433)
Username:
sa
Password:
****
Remember
Test Connection
Database:
AdventureWorks2017
Owner:
All User Schemas
Include:
Table Data
Triggers
Sequences
Table Definitions
Functions
Synonyms
Procedures
Views
Types
Use default settings
Show on Startup
<< Previous
Next >>
Cancel



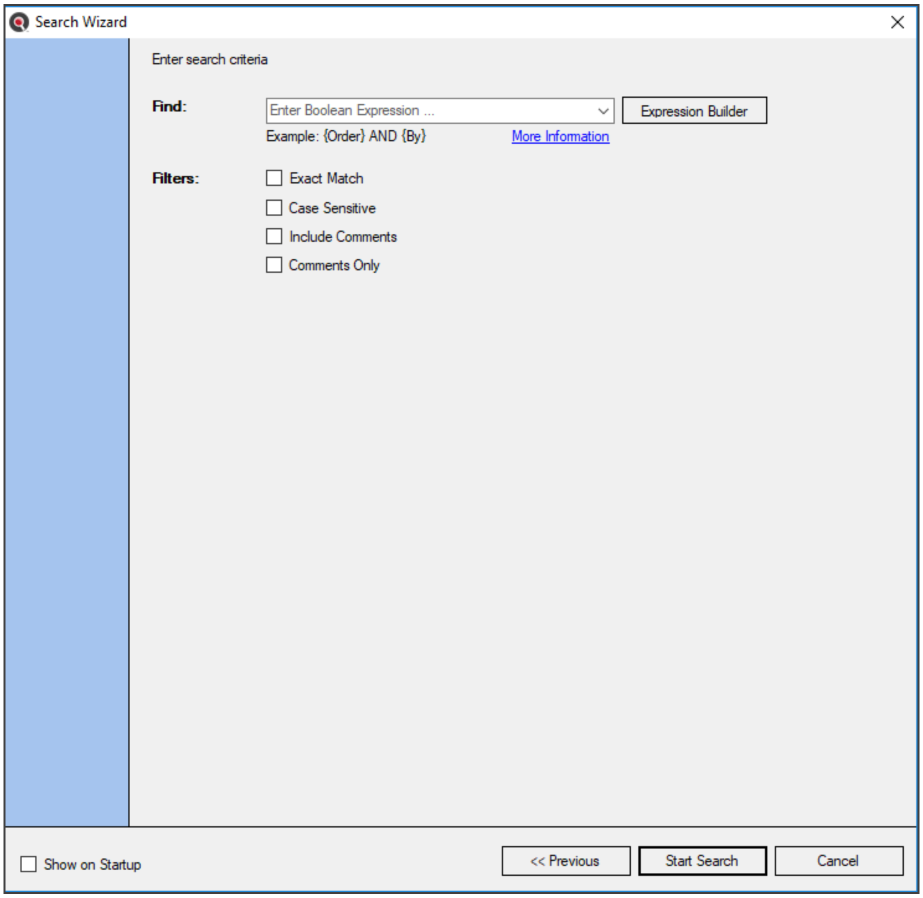
1. On the **Options** tab (selected by default), enter the connection information for the selected source.
2. To test the connection, click on the **Test Connection** button where applicable.
3. In the **Include** section, select all document types you wish to search. Click the **See more** hyperlink for additional hidden but available document types.

   Alert: You must select at least one document type to be included from each source location.

   Note: The **See more** link located at the end of the **Include** lists, 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 custom program settings.
4. To apply a filters in order to limit the subset of documents to be included, click on any of the object **Filter** tabs to right of the **Options** tab and see links below for more detail.
5. 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:



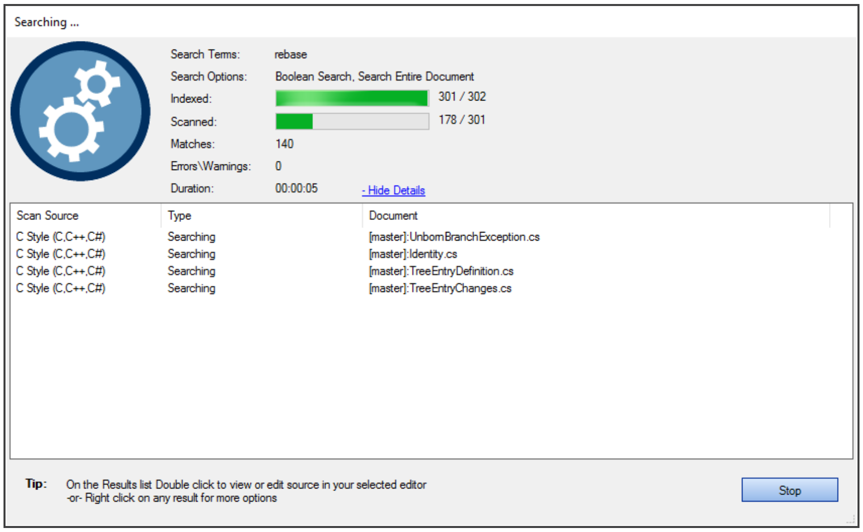
1. From the **Search Type** drop-down list, click to select one of the following options:
   - **Boolean** (can include wildcards)
2. In the **Find** text box, enter the desired search expression.

> **Tip:** Click on the **More Information** link for search expression hints, or click on the **Expression Builder** button for assistance building complex boolean queries.

   - 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 53
- "Perform a Regular Search" on page 135
- "Use the Expression Builder" on page 140
- "Local or Network Folders" on page 75
- "Databases" on page 88
- "Local or Network Folders" on page 75
- "Projects" on page 69
- "Perform a Regular Search" on page 135

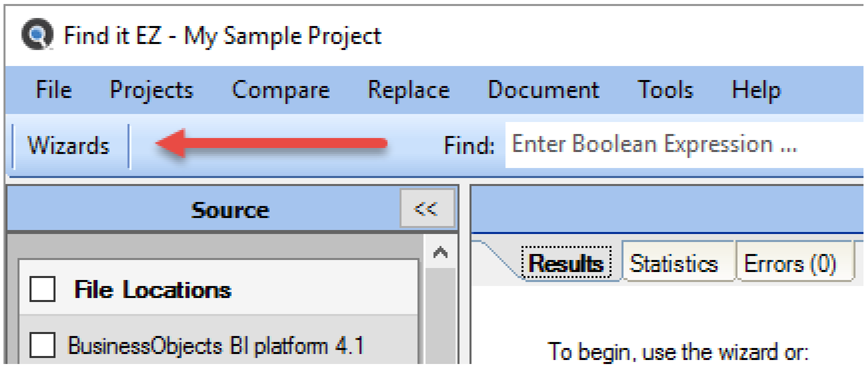
Document Wizards

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 main menu. See below:

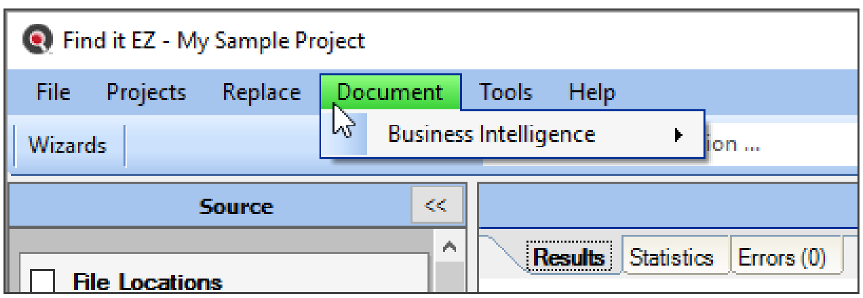
1. Launch a **DOCUMENT** wizard via the **Wizards** button:
   a. Click on the **Wizards** button in the search bar. See below:



   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
      - Create a list of all my reports, including printer and update information

   OR

2. Launch a **DOCUMENT** Wizard via the Find it EZ menu:



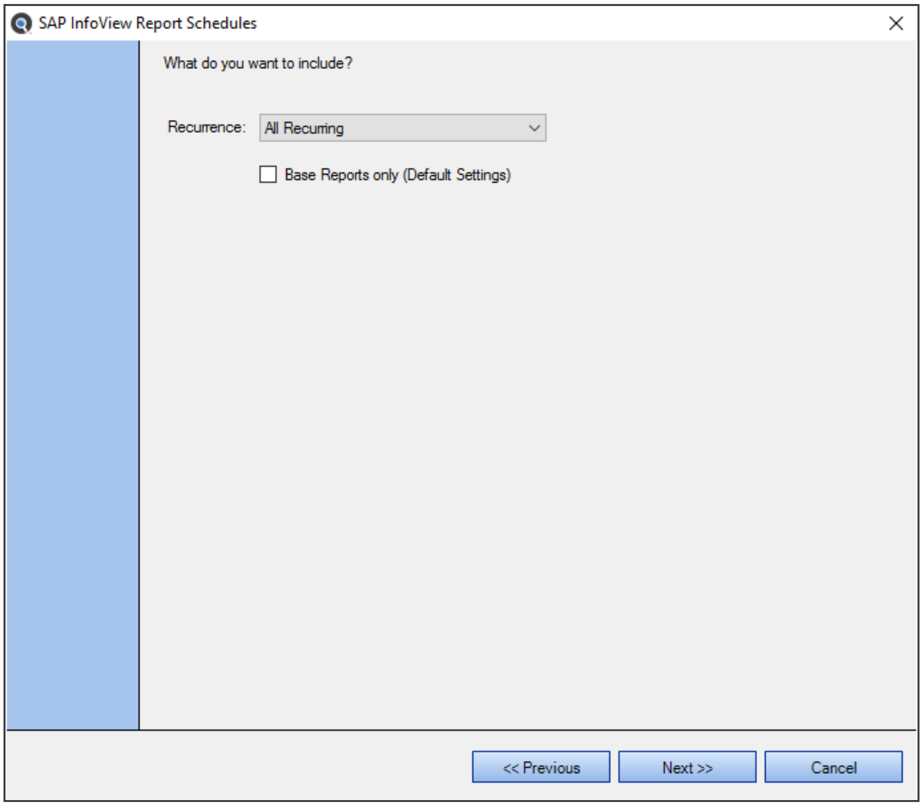
   - Select **Reports -> Business Intelligence -> [Any Option]**

3. Click on the **Next >>** button to continue.
4. The selected **DOCUMENT** Wizard will open.

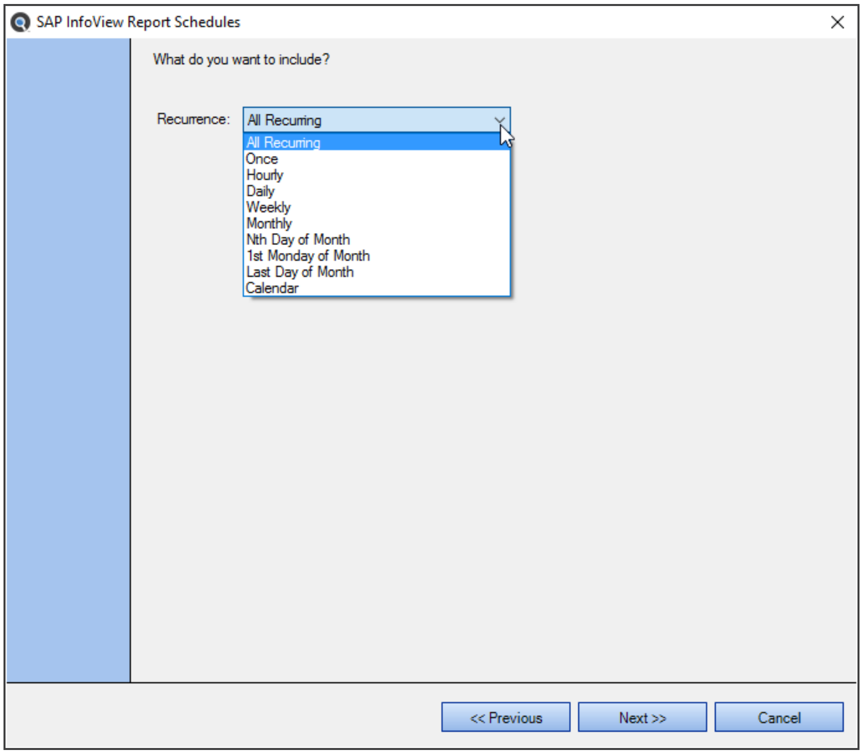
> **Note:** The following example is the **DOCUMENT** Wizard for an SAP BI Platform schedule listing, which is only available in our Dev Surge 365 product edition. However, most of the steps and dialog boxes presented in this example are virtually identical for the other Document Wizard options.

Select Recurrence and What to Include

> **Note:** The recurrence dialog is only selected for the SAP BI Platforms schedule listing option of the **DOCUMENT** Wizards; (which can also be accessed from the menu via ***Document -> SAP BOE / Crystal Server -> Report Schedules***).


SAP InfoView Report Schedules
What do you want to include?
Recurrence:
All Recurring
Base Reports only (Default Settings)
<< Previous
Next >>
Cancel

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 SAP BI Platform repository schedule frequency options.

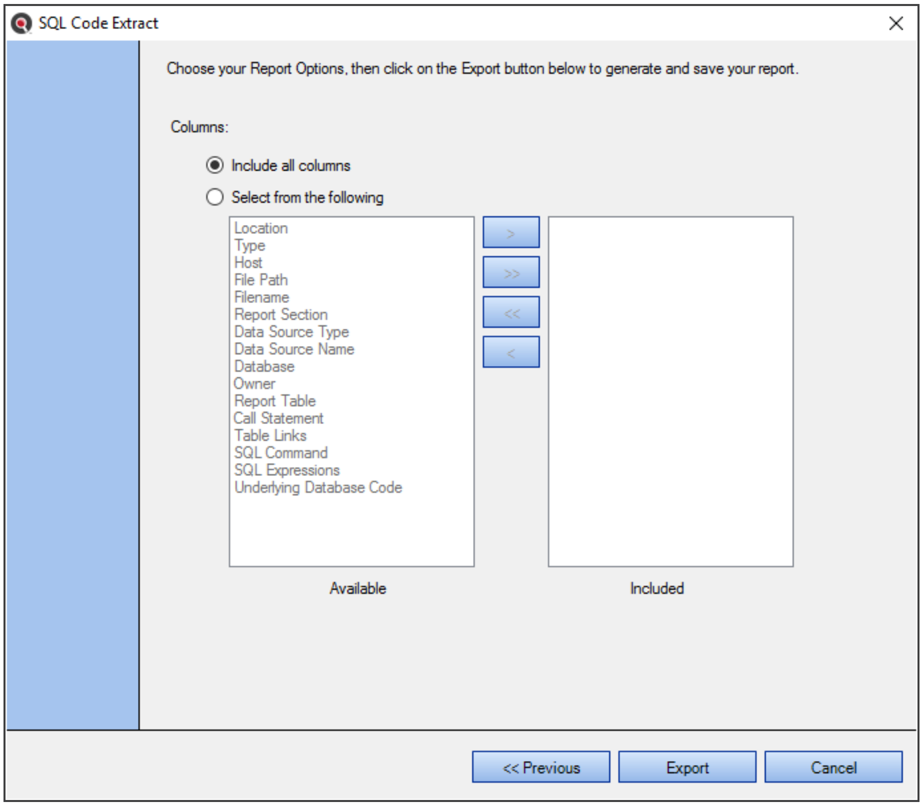
2. Click to select the desired recurrence.
3. If you want to show the default settings, click to check the **Base Reports only** check-box.

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:

- "Reporting Tools" on page 204
- "Create a Database Cross-Reference List" on page 204

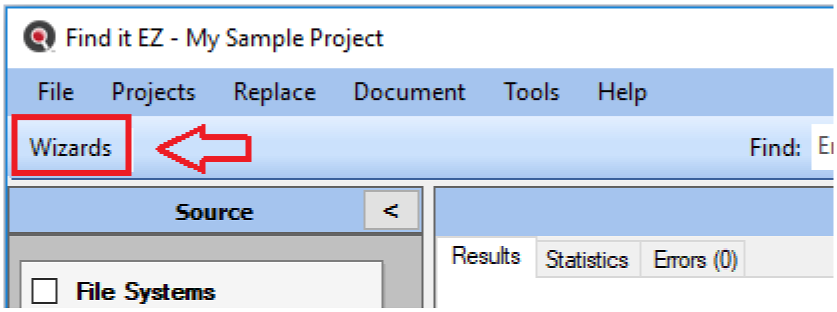
Replace Wizards

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.

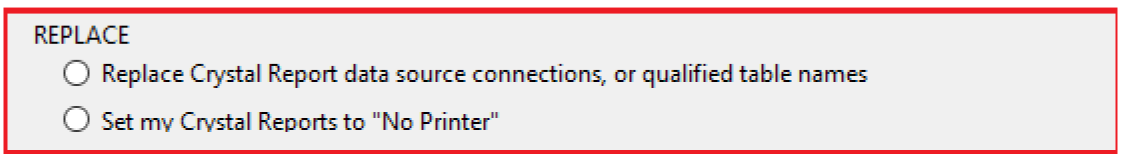
Launch the Replace Wizards

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

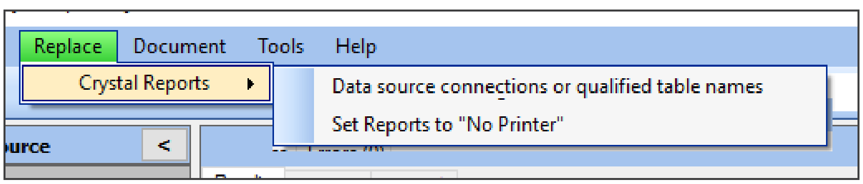
1. Launch a REPLACE Wizard via the **Wizards** button:
   a. Click on the **Wizards** button in the main application window.



   b. Click to choose the following **REPLACE** wizard option:



OR

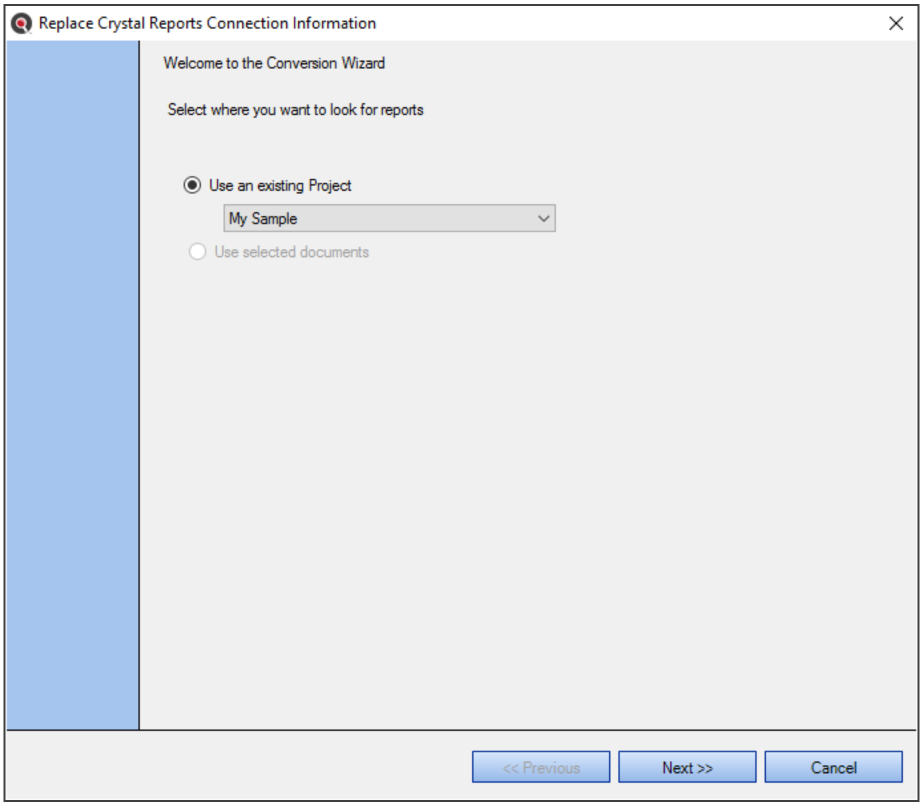


2.

3. The selected REPLACE Wizard will open.

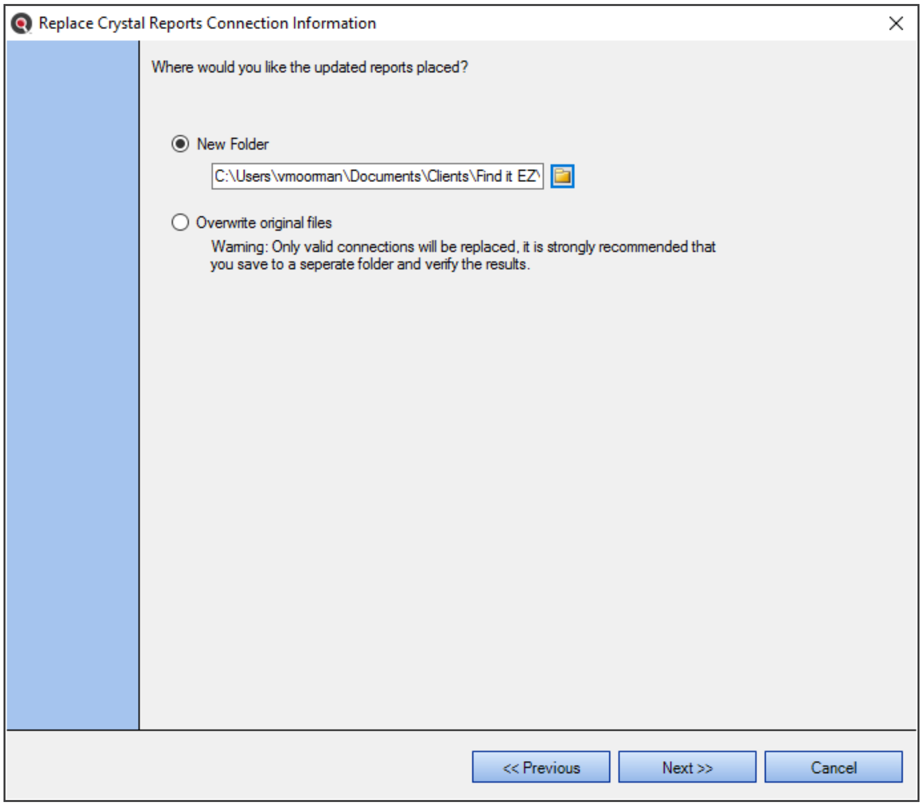
Select Where to Look for Reports

Below is an example of the "change Crystal Reports Datasource connections" replace wizard.

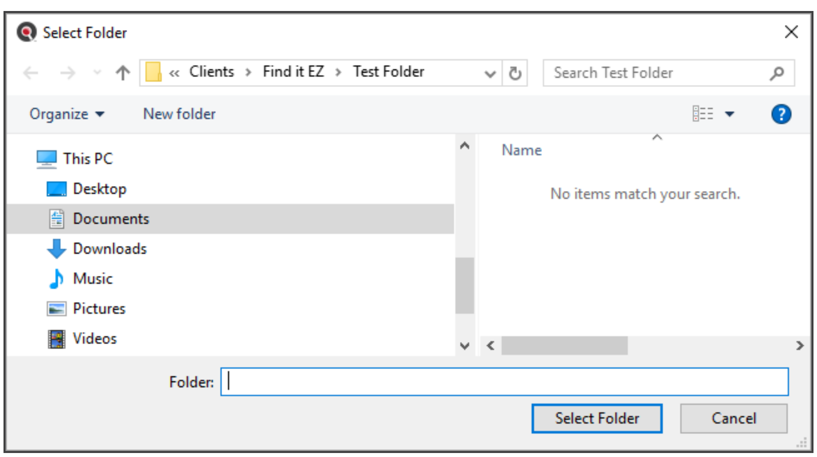


1. Click on the corresponding project drop-down list and select the desired project.
2. If you have one or more search results selected, click to choose the **Use selected documents** option. This is a way of running the report with only a subset of items based on your last search.
3. To continue, click 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

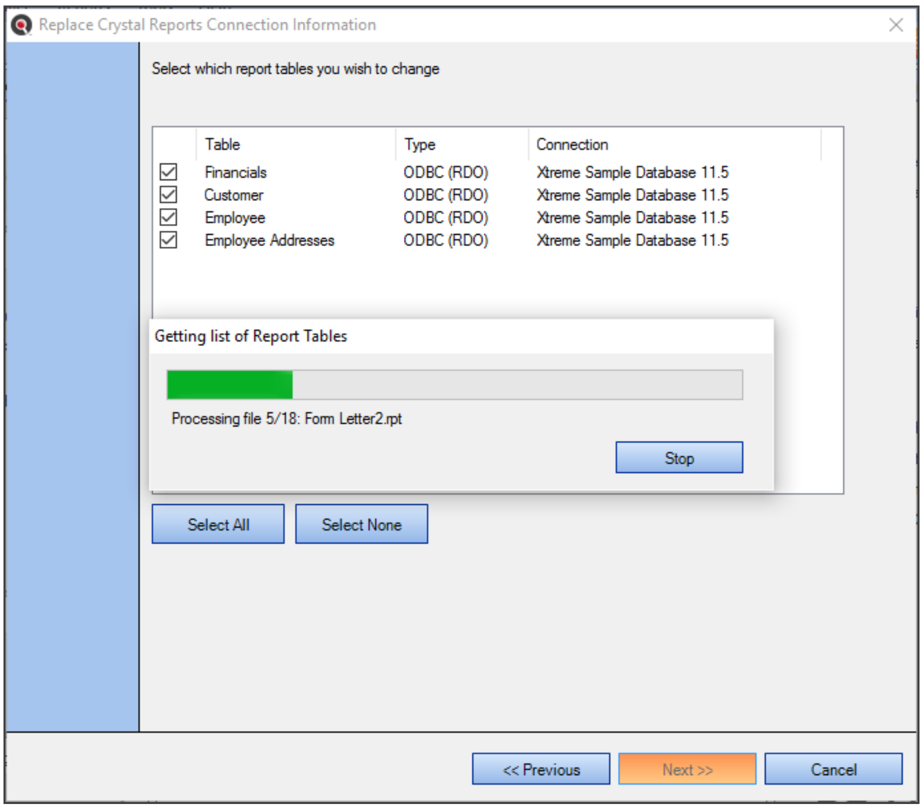
2. To overwrite the original files, click to choose the **Overwrite original files** option.

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.

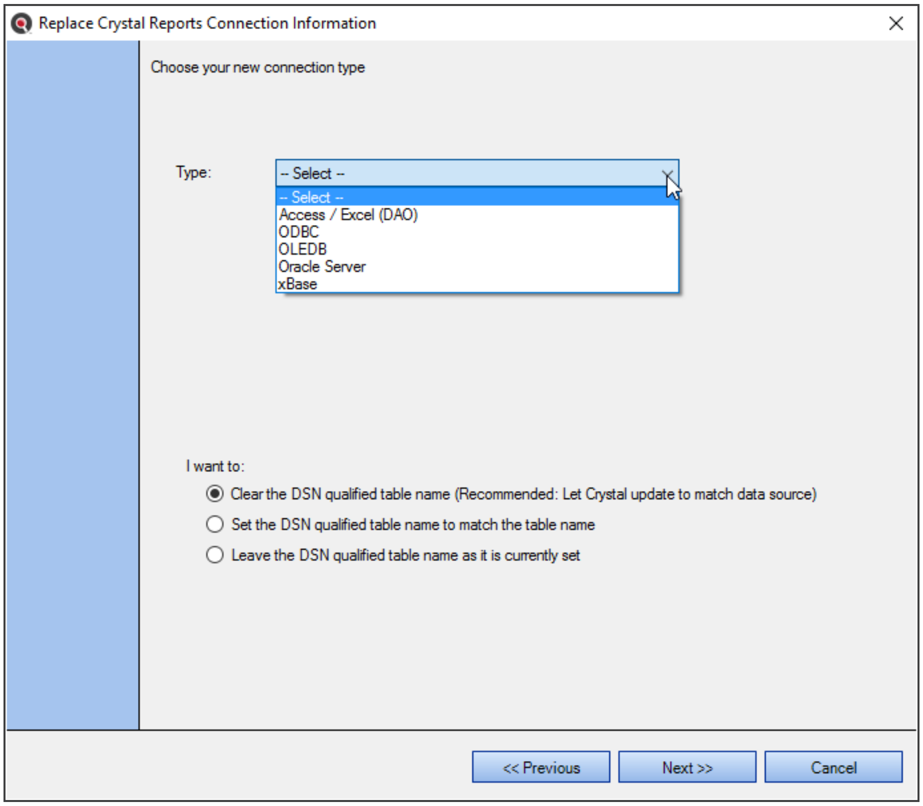
Select Report Tables to Change

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.

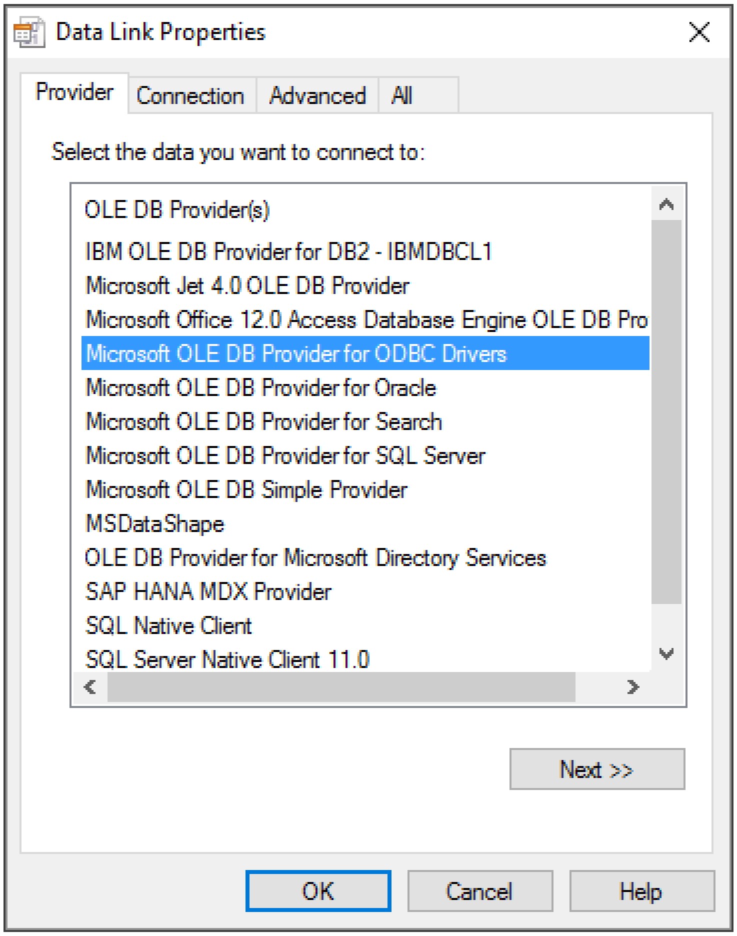


1. A list of report tables from the selected location will load. See example above:
2. To stop Find it EZ from loading report tables, click on the **Stop** button.
3. For each report table to want to change, click to check the preceding check-box. Note that all report tables in the selected location are selected by default.
   a. To deselect 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.

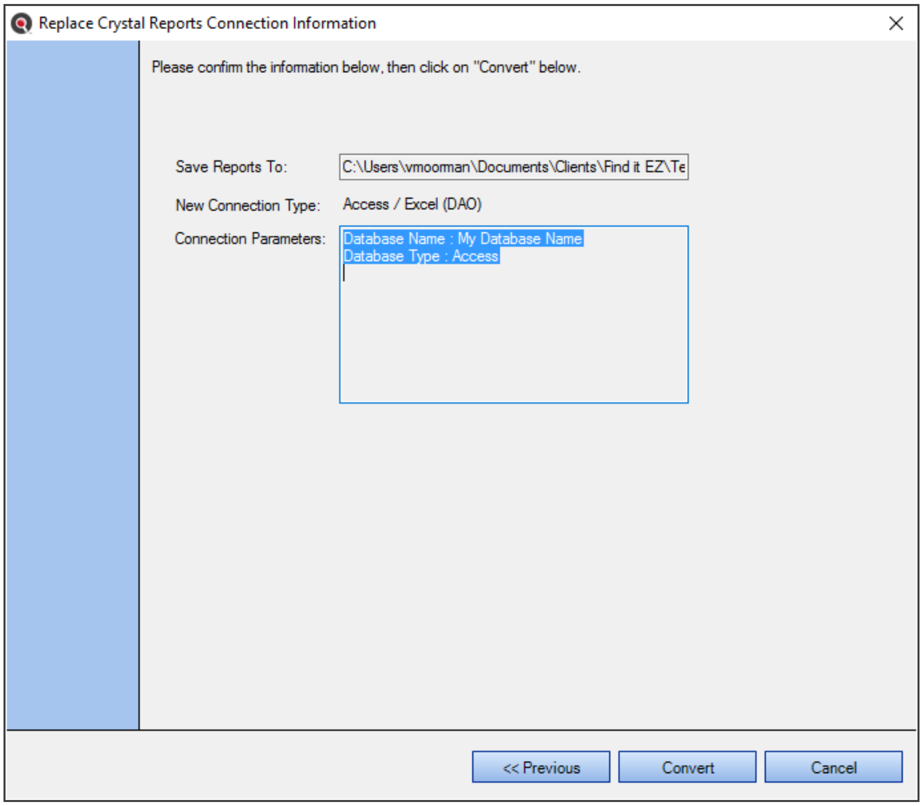
d. For **Oracle Server**, enter the **Service**, **Username**, and **Password**.

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

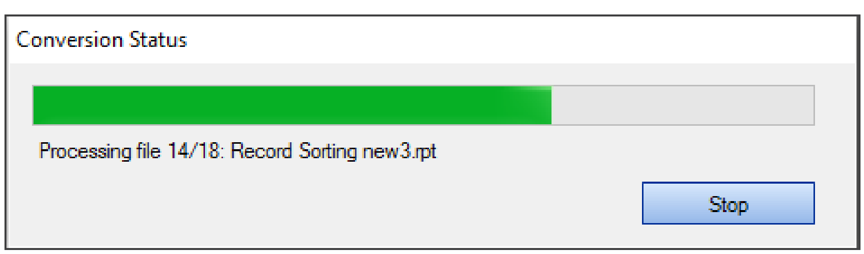
   a. In the **I want to** section, click to choose the desired option.

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

Confirm Information and Replace



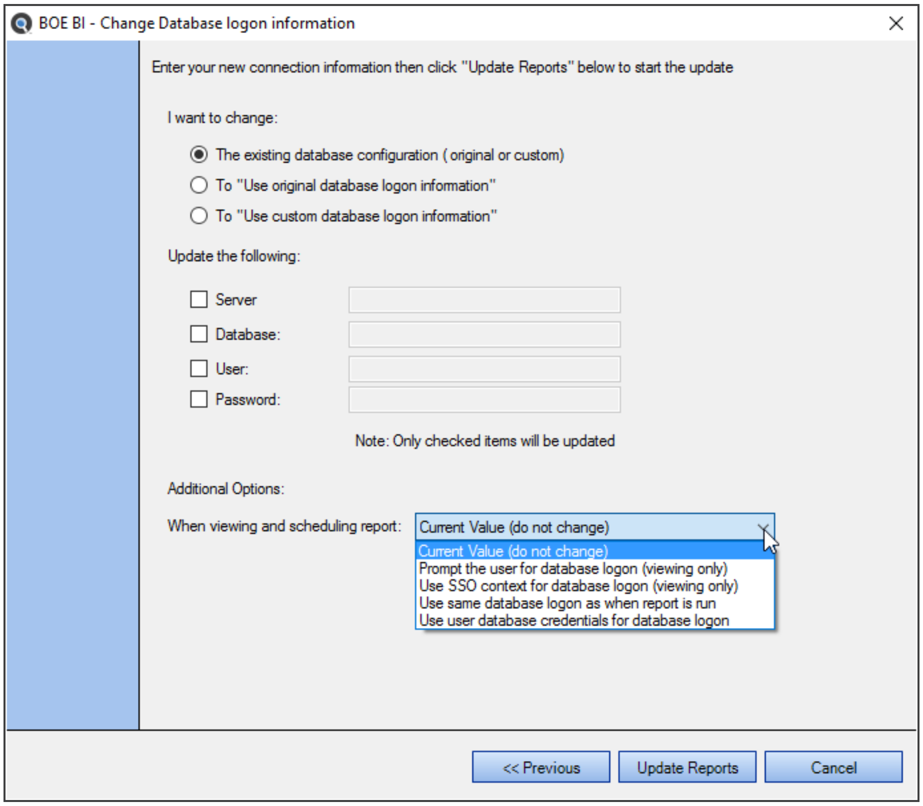
1. Review the following information:
   - **Save Reports To**
   - **New Connection Type**
   - **Connection Parameters**
2. If changes are required, click on the **<< Previous** button. Click the button again to return to previous steps.
3. If the information is correct, click on the **Convert** button. 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 launch 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 **Wizards**. 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.

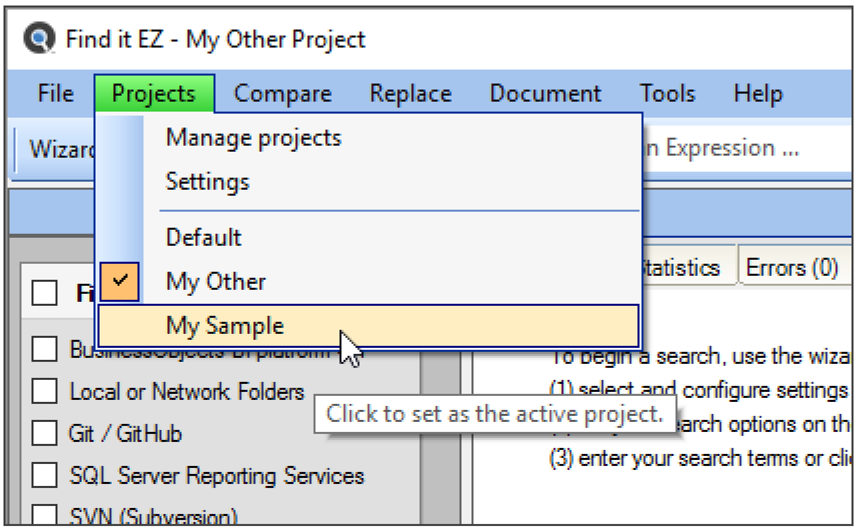
Perform a Regular Search

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

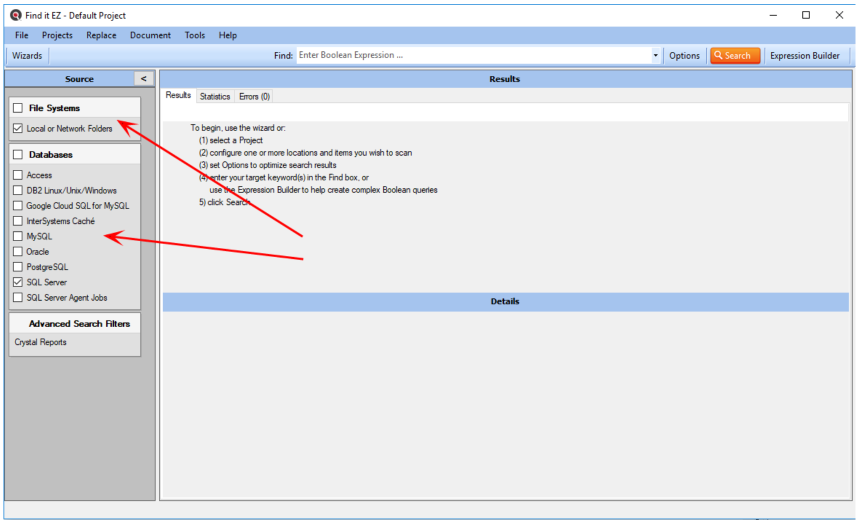
1. From the Find it EZ menu, select ***Projects***. The currently active project appears preceded by a check mark, as in the example below:



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)

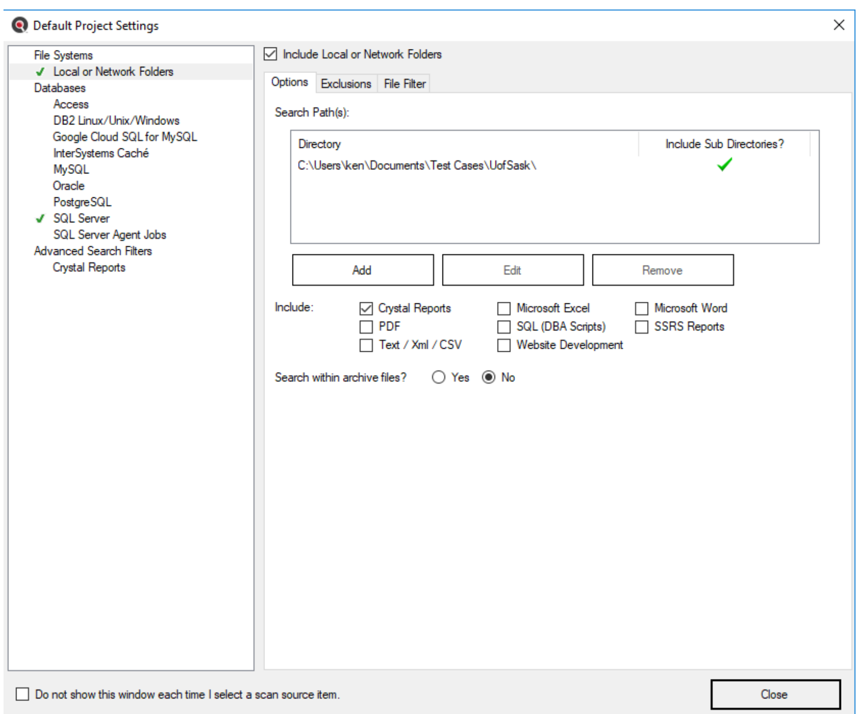
1. From the **Source** panel on the left, select the source locations containing documents you want to search:



   a. Click on a source item. A **[Project Name] Project Settings** dialog will appear, showing advanced configuration settings for the selected source location. See example to follow.

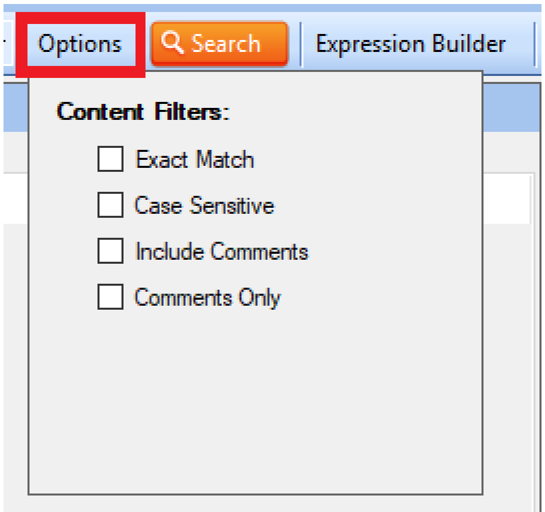
   b. Configure settings, as required.

2. Example - search Local or Network Folders:



Set Search Options

Click the **Options** button on the search bar, select the desired **Content Filters** to minimize false-positive search results.



Note: Default search **Options** are: **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.

Boolean with Wildcards Search Expressions

Search expressions syntax is boolean with wildcards. This allows you to search for field {A} OR {B} , {{A} AND {B}} OR {C}, etc. Note that curly brackets are delimiters for words and strings between boolean operators. The wildcard character is an asterisk (*). For example, if you search for "User*," the system will only find matches on items that start with the text "User."

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

- Wildcard is "stopped" on a white space 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.

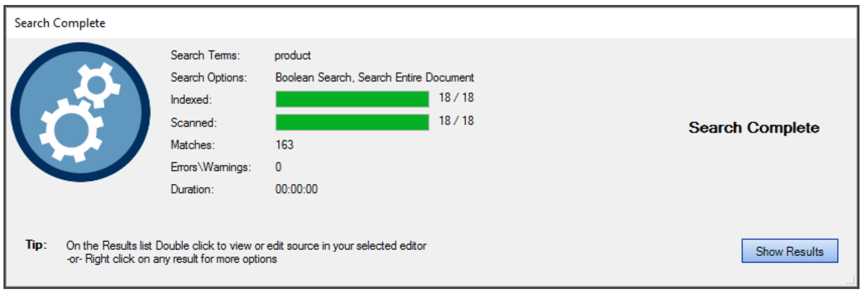
Enter Target Keyword(s)

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

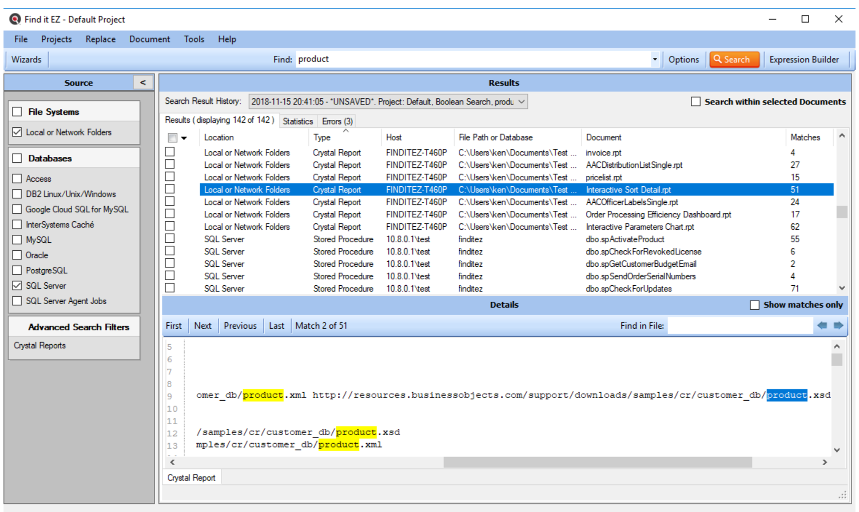
Example:

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.

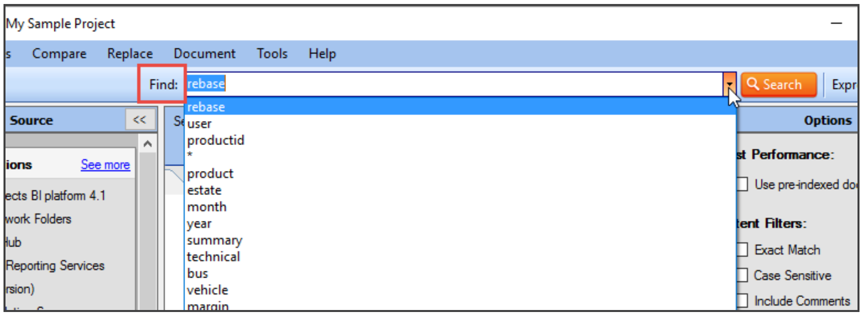


Note: After performing a search, settings can be saved to a Project for later use again.

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:

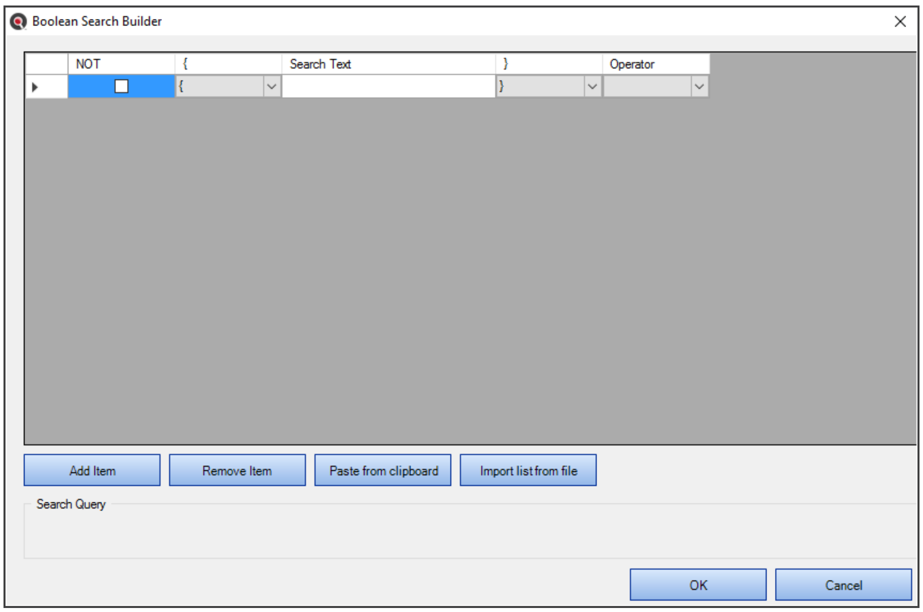
- "Local or Network Folders" on page 75
- "Databases" on page 88
- "Programs" on page 101
- "Documents" on page 105
- "BI Reports" on page 98
- "Wizards Overview" on page 110
- "Projects" on page 69
- "Set User Options" on page 50
- "Use the Expression Builder" on the next page
- "Work With Search Results" on page 150
- "Clear Expressions History" on page 61
- "View Search Result History" on page 150

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.

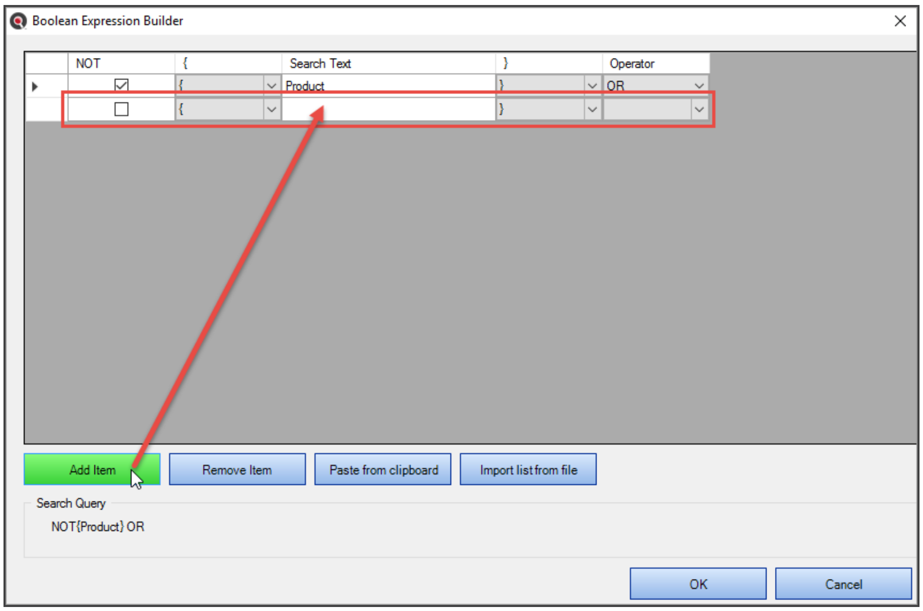
For example, to have the Boolean operator "AND" be recognized, you must enclose the search terms in curly brackets, e.g. {this} AND {that}. The use of curly brackets is special syntax to our software. The **Boolean Search Builder** wizard helps with this for building / managing complex expressions, especially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

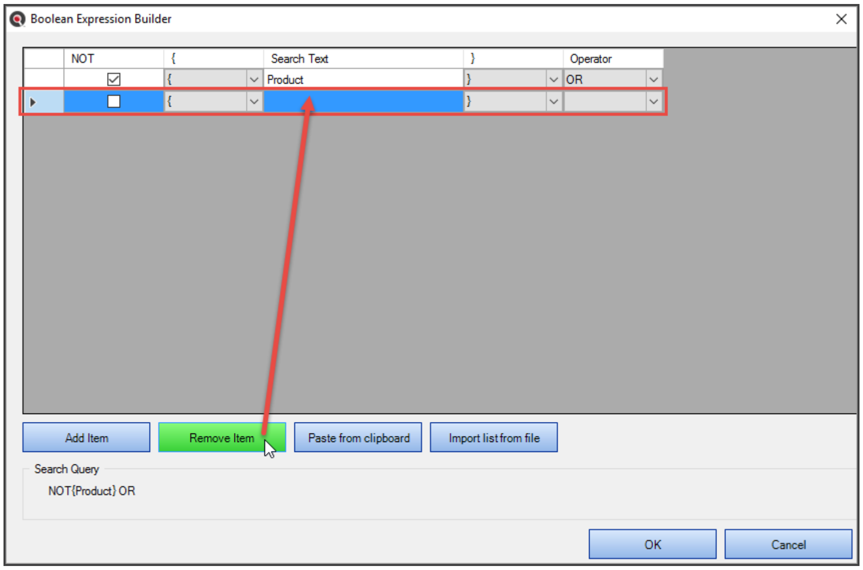
To add a new search query item, click on the **Add Item** button. A new, blank search query item line will be added.



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

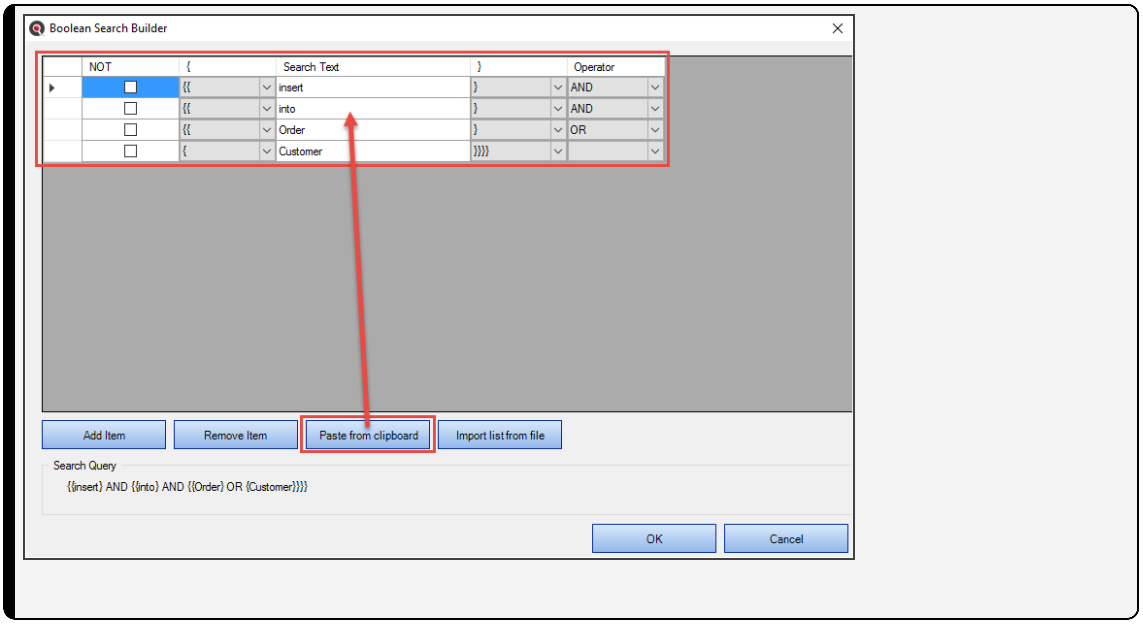
To copy a search query item to the clipboard:

1. Locate the desired search 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:

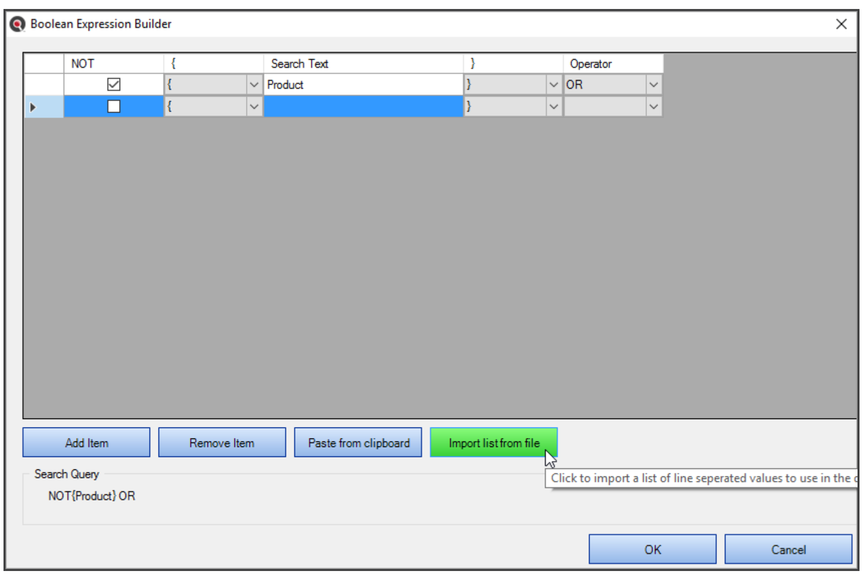
1. Click on the **Paste from clipboard** button. A search query item line will be created for each instance of search text and the correct curly brackets and operators will be applied. See example below:

> **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

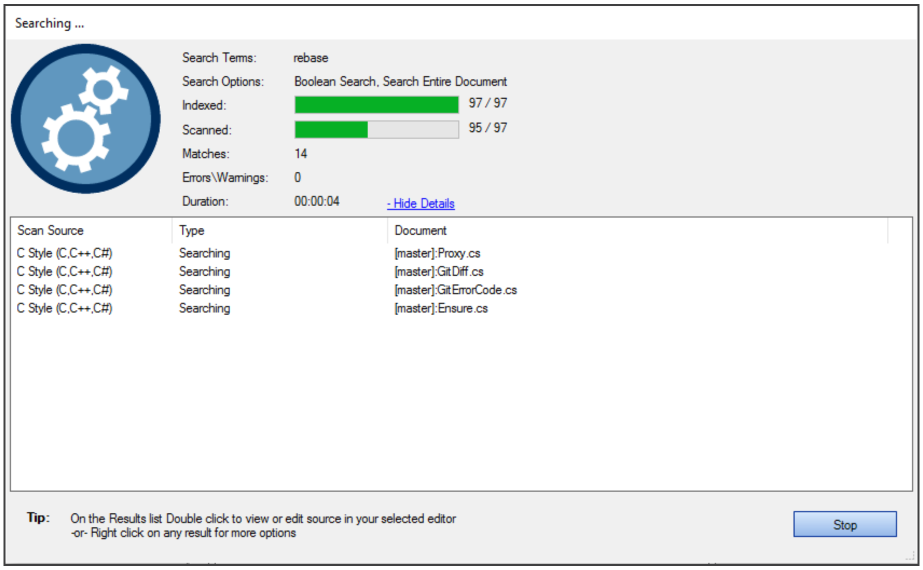
As you are building your search query using the **Boolean Search Builder**, note that the entire search expression is shown in the **Search Query** box at the bottom of the dialog box.

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:

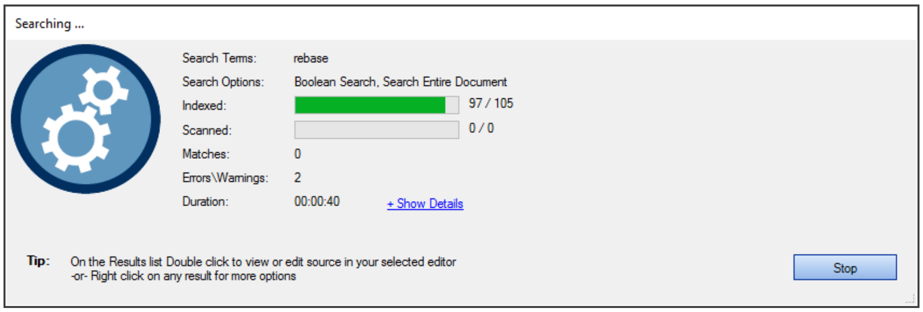
Searching Data Element	Description
Search Terms	This is the search expression entered into the **Find** text box located on the Search Bar.
Search Options	This is a summary of the current **Search Type** and **Content Filters** settings on the **Options** panel.
Indexed	This shows a visual progress display 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

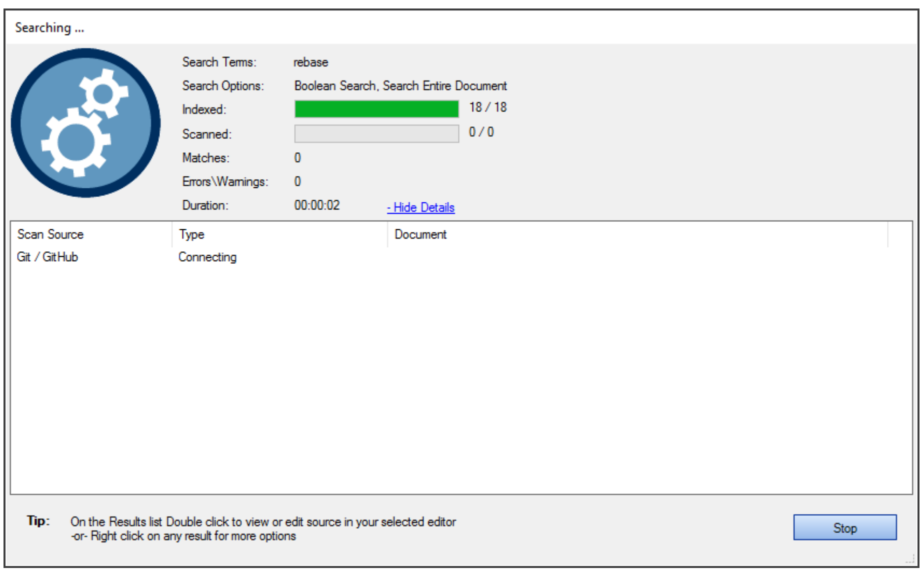
Once a search is launched, you can continue working on other programs while Find it EZ runs unattended in the back-ground. While a search is running, you can not minimize the Find it EZ program or use any other window in Find it EZ as the search dialog box keeps focus until completed or cancelled. However, 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:

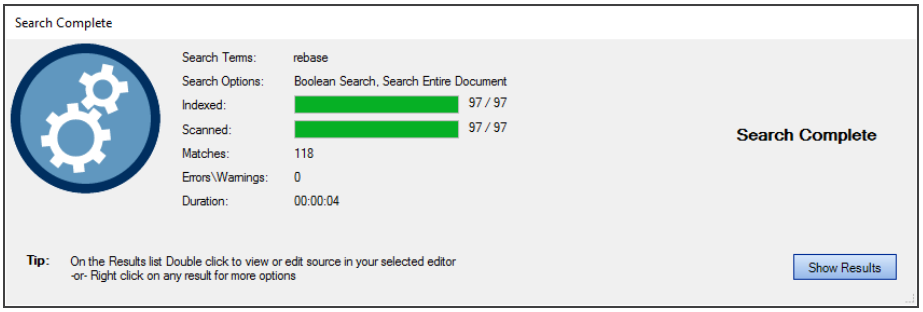


To hide details, click on the **- Hide Details** link.

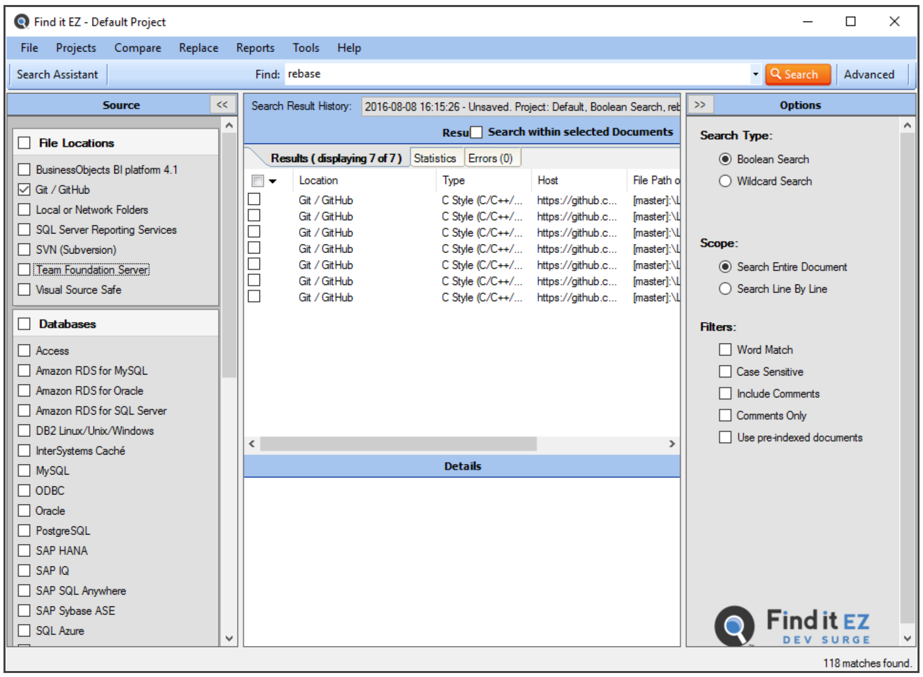
Show Search Results

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.

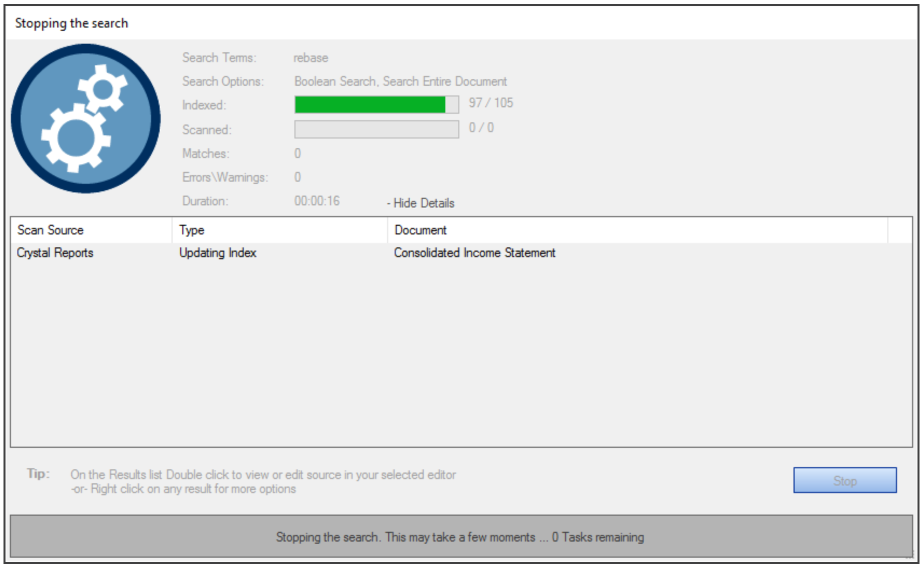


The results will appear listed in the **Results** window. See example below:



Stop Searching

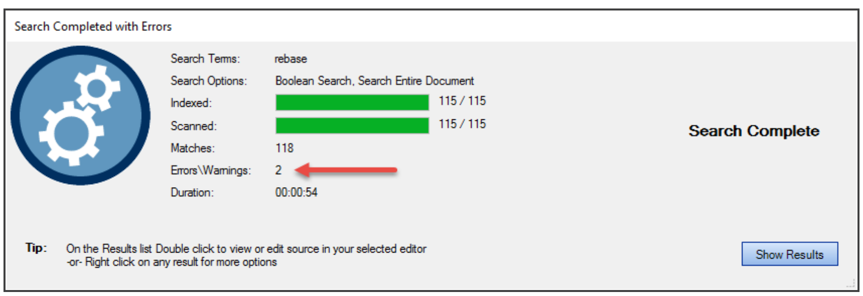
To cancel a search in progress, click on the **Stop** button. A notification will appear at the bottom of the dialog. See example below:



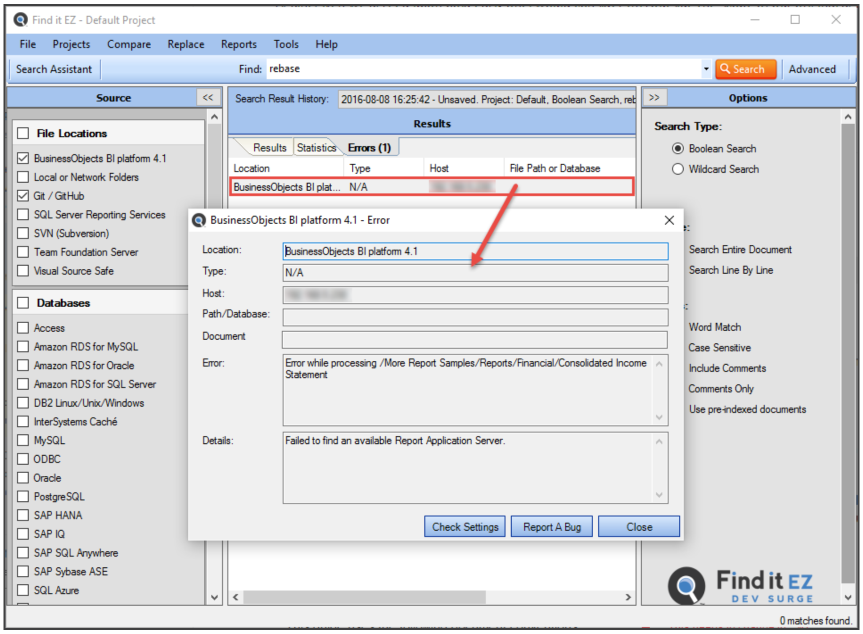
View Search Errors

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:

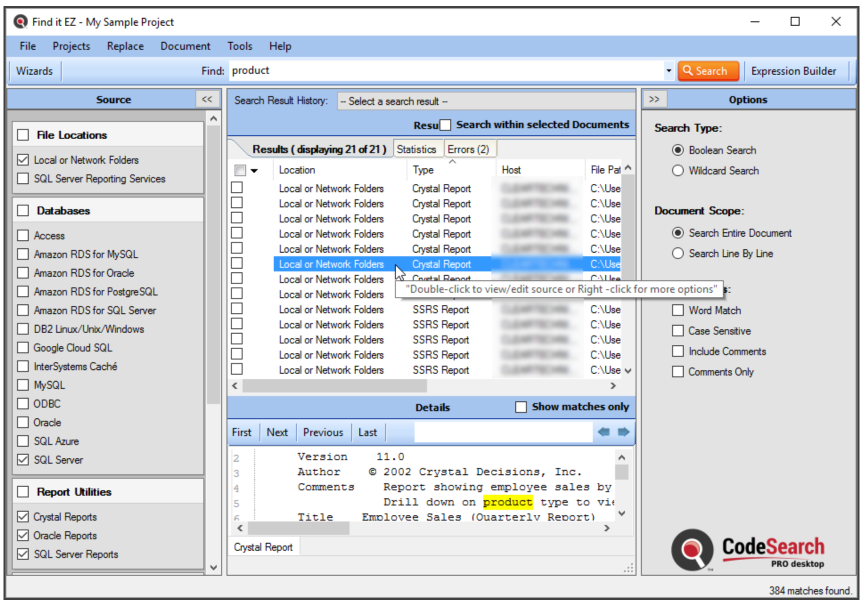
- "Work With Search Results" on the next page
- "File Locations and Source Settings" on page 73
- "Find it EZ Support" on page 228

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.



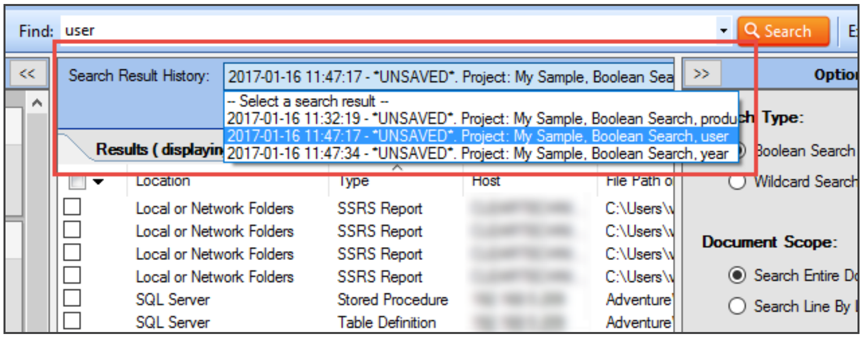
> **See Also:**
>
> - "Wizards Overview" on page 110
> - "Perform a Regular Search" on page 135

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.



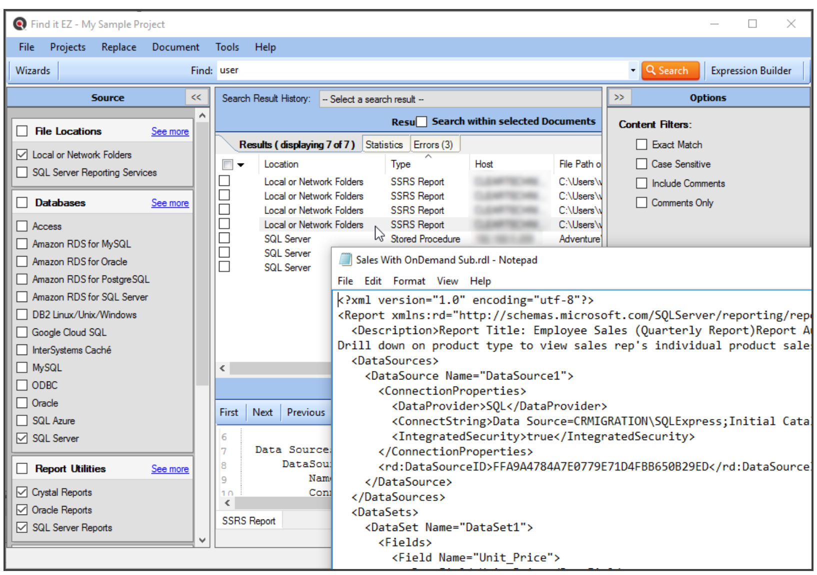
2. Locate and click on the desired search result record. The corresponding search results will appear in the **Results** window and will include any annotations or items marked complete.

View Result Source

Open Result

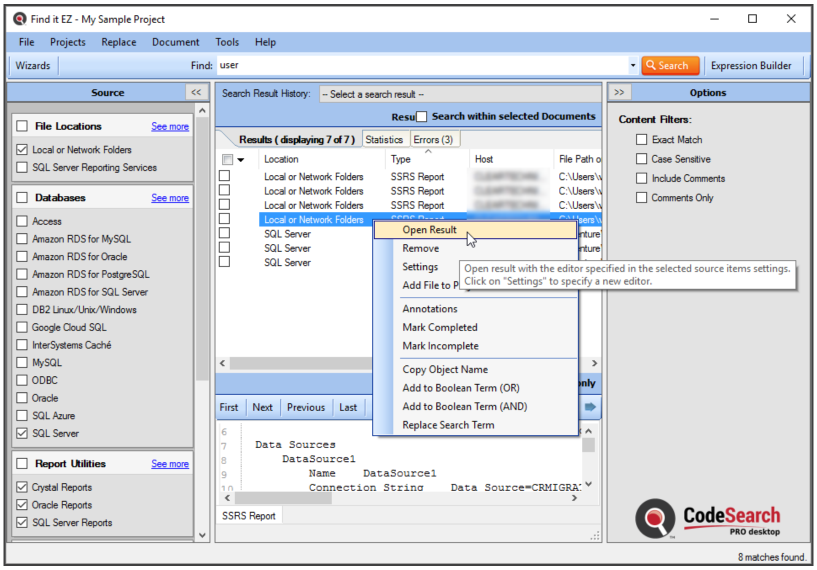
1. To open the details of a matching search result with either the built-in code viewer or selected default file type editor:

   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 preselected viewer / editor depending upon the file type.

> ## See Also:
>
> - "Viewer / Editor Settings" on page 56

Find it EZ Result Viewer

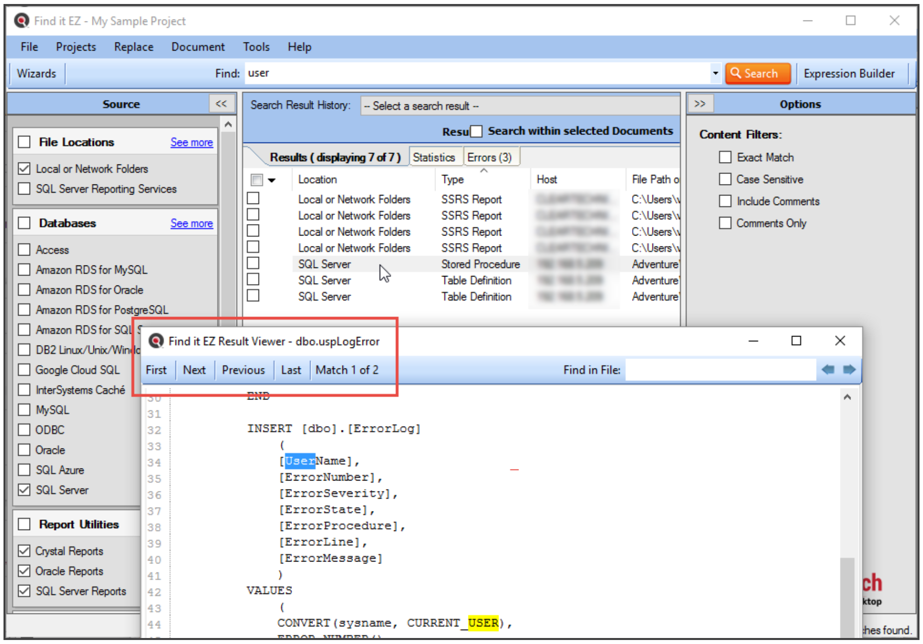
The Find it EZ **Result Viewer** allows you to view the source code for a search result document. This section describes the steps required to open the viewer, change a location or group, navigate search results, find a file, and view or edit the source code in another program.

Open Find it EZ Result Viewer

If " Find it EZ Viewer" is selected for the `Opens with` program in "Viewer / Editor Settings" on page 56, then when you "View Result Source" on the previous page, it will appear in the built-in Find it EZ Viewer (see examples to follow). Text matching your search criteria (i.e. matches) is highlighted in yellow within the Find it EZ viewers.

> **Note:** The built-in Find it EZviewer is the default "Opens with" app for all file types. Contents in the viewer are searchable and match the **Details** panel contents in the main Find it EZ dialog. There are three different built-in viewers:
>
> 1. Text viewer - for all source code files, displays highlighted matches content.
> 2. Data viewer - for database table data, displays a grid with data in cells (columns and rows). Column headings are the database table fieldnames.
> 3. Spreadsheet viewer - for Excel documents, displays a grid with cell data, and includes display of cell formula contents. Column headings and row numbers are like Excel (A, B, C ...) and (1, 2, 3 ...) respectively.

Navigate Search Results

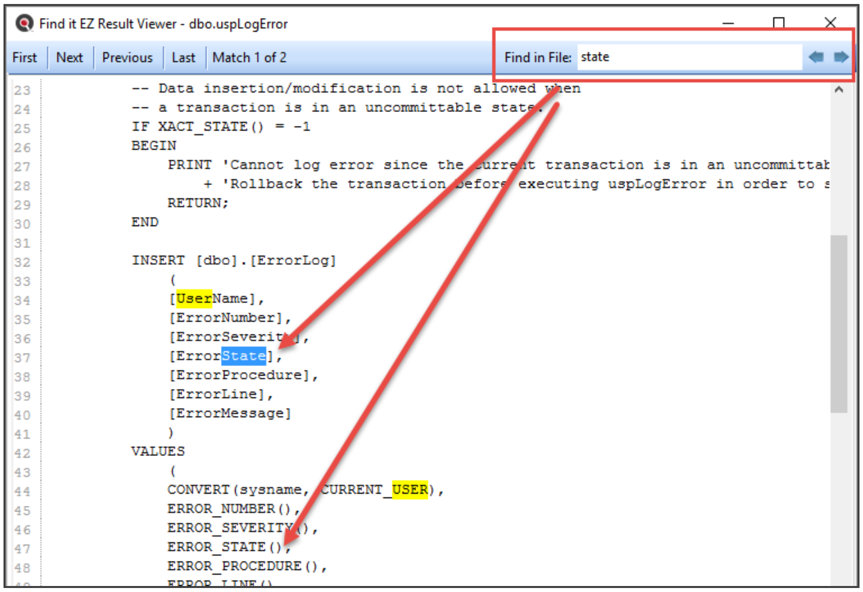


To navigate through the matches found in your document, click on the **First**, **Next**, **Previous**, or **Last** buttons located at the top left of the viewer. Note that a counter to the right of the buttons keeps track of which match you are viewing; e.g. "Match 7 of 9."

Find in File

To search within the result document:

1. Enter the desired search text into the **Find in File** text box.

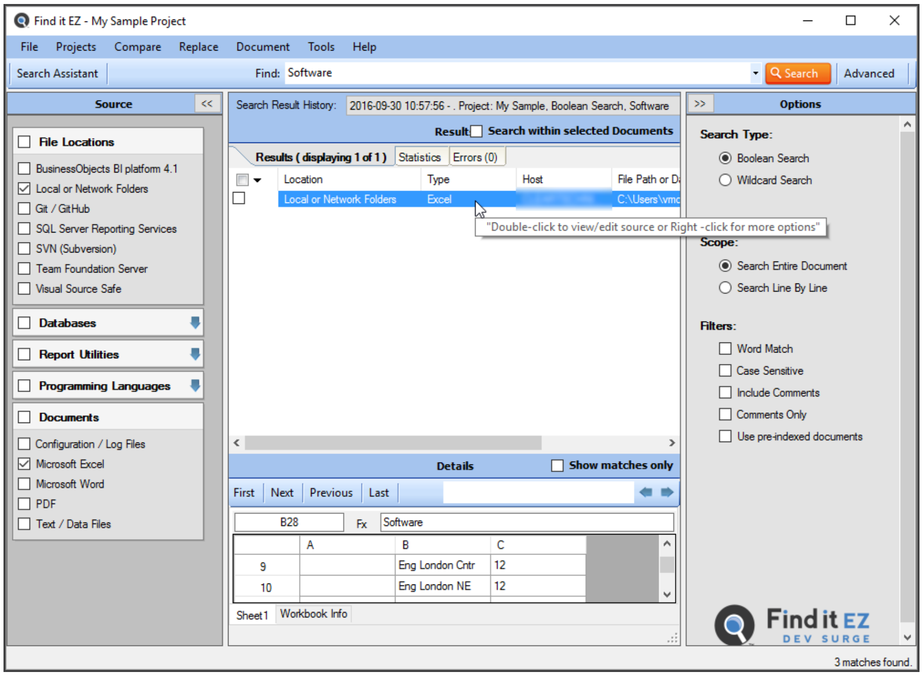


2. Click on the left arrow (find previous) or right arrow (find next) button. OR, press the **Enter** key on your keyboard to 'find next.'
3. Items matching your search criteria will be highlighted in blue. Click on the right arrow button or press **Enter** to navigate through the matches found.

Documents with Multiple Tabs

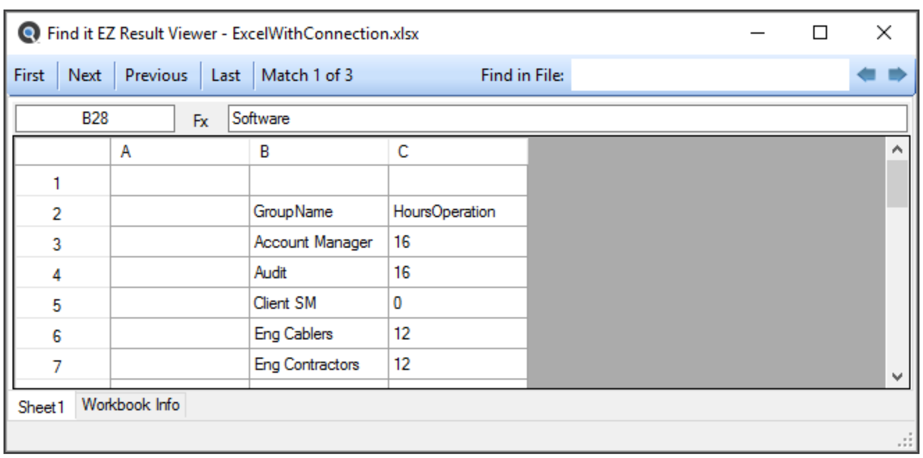
The Find it EZ **Result Viewer** for some documents will contain multiple tabs. For an Excel workbook, there is one tab per worksheet (e.g. **Sheet 1**) plus a tab for workbook details (**Workbook Info**; including database connections, etc.). For other documents, you normally only have a single tab 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:

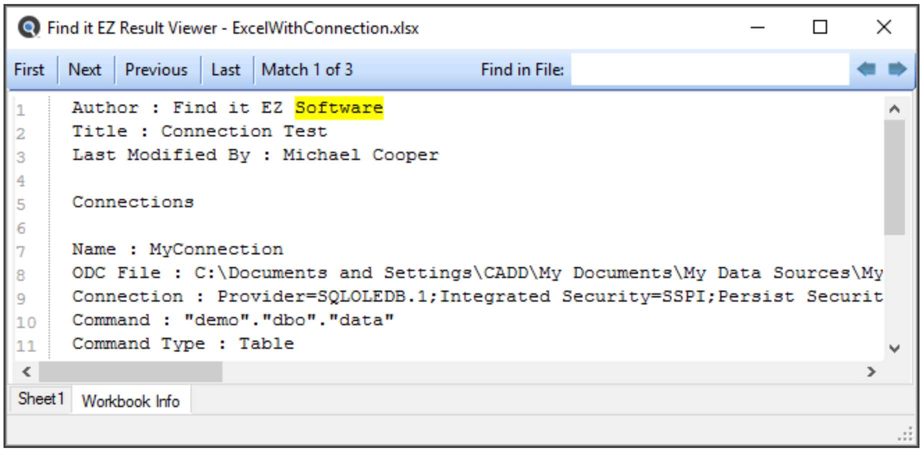


To open the Find it EZ**Result Viewer**, right-click on the workbook in the **Details** panel and select ***Open*** from the context menu. Or, double-click on the workbook.

Result Viewer Tabs:



Workbook Info tab:

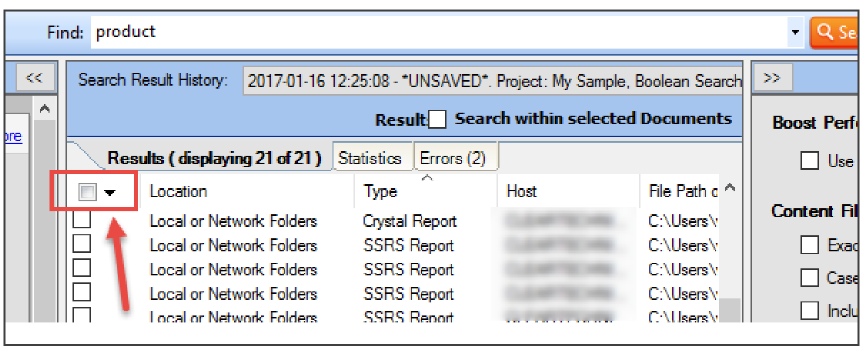


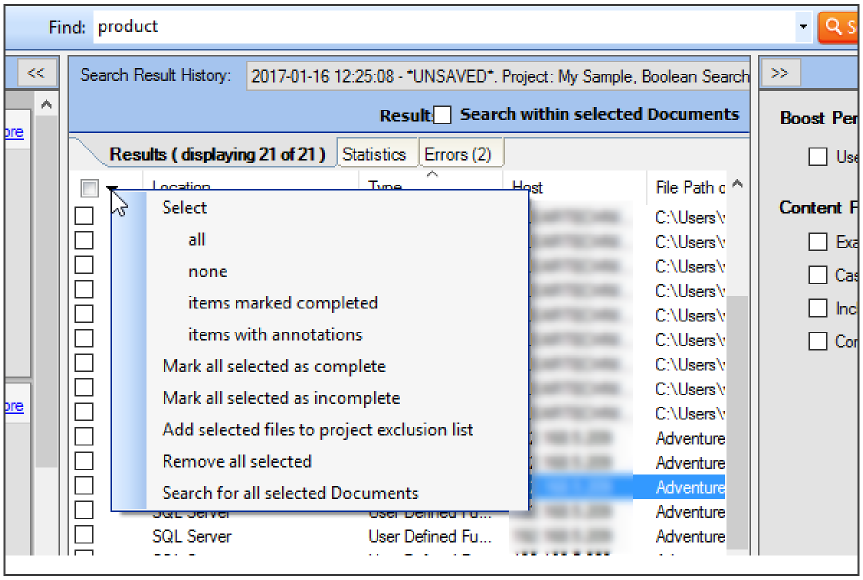
See Also:

- "Viewer / Editor Settings" on page 56
- "View Search Result Details" on page 165

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:

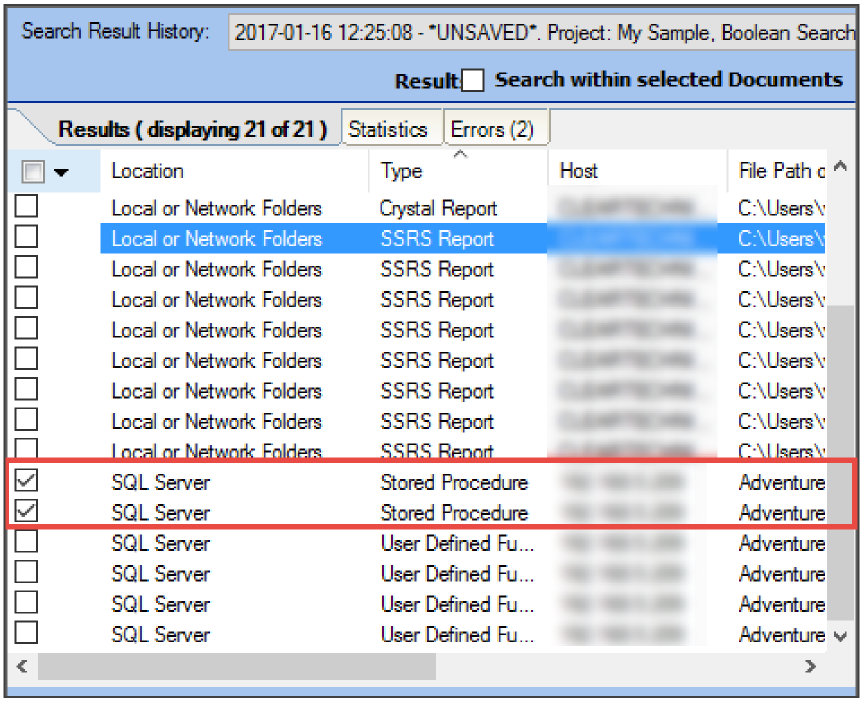




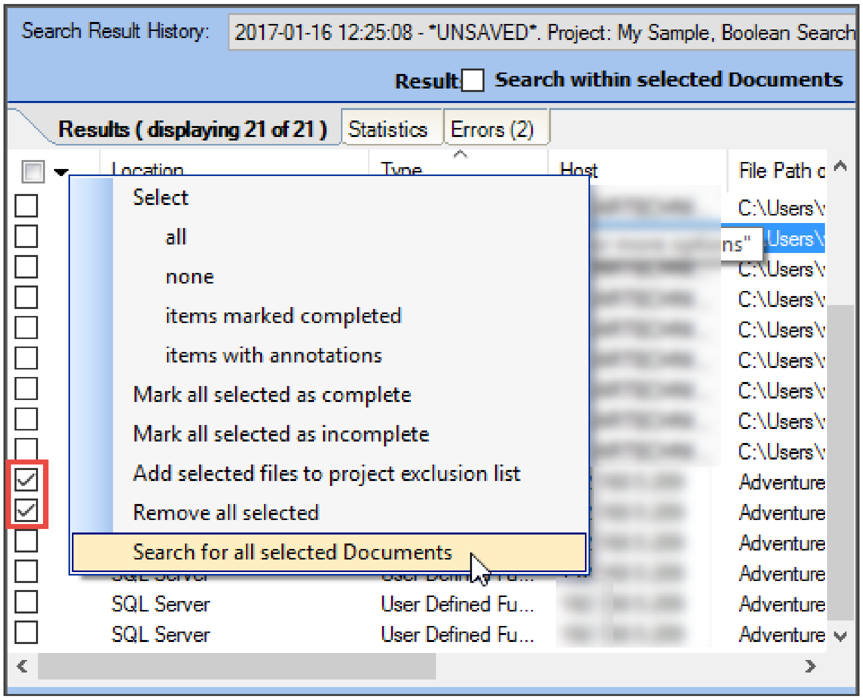
2. To select all results:
   - From the menu, choose ***Select -> All***. All results will be selected (checked).
3. To deselect all results:
   - From the menu, choose ***Select -> None***. All check-boxes will be cleared.

Search for All Selected Objects

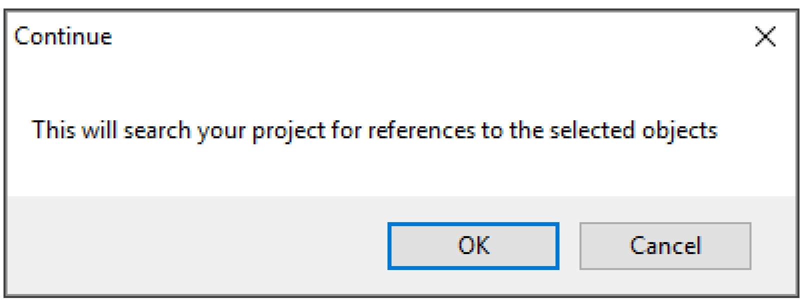
1. In the check-box column, click to select (check) the result objects for which you want to search your project for references.



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.

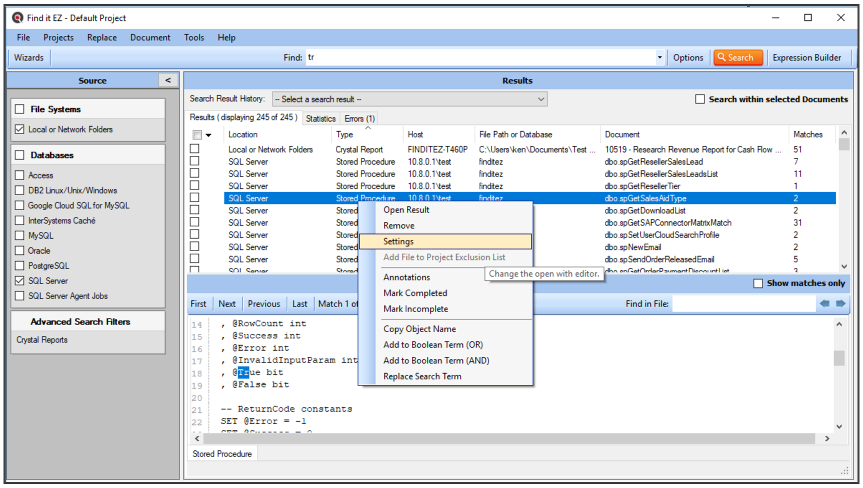
   OR

5. To cancel, click on the **Cancel** button.

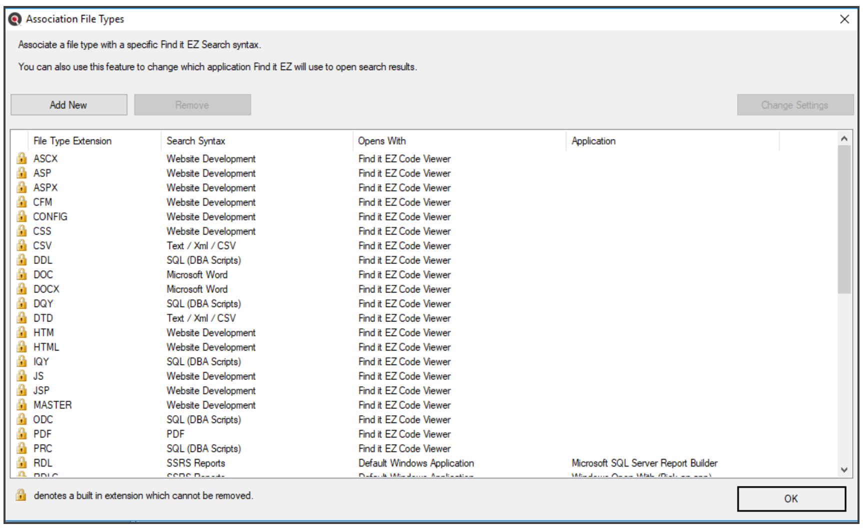
Open Viewer and Editor Settings

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 **Associate File Types** dialog will appear.



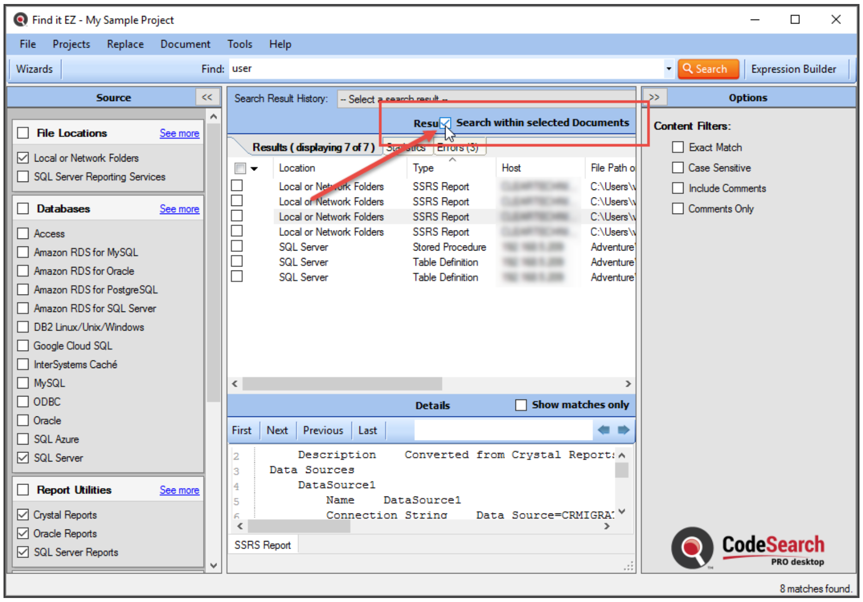
See Also:

- "Viewer / Editor Settings" on page 56

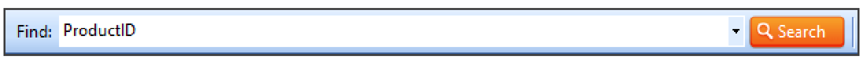
Search Within Result Documents

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:

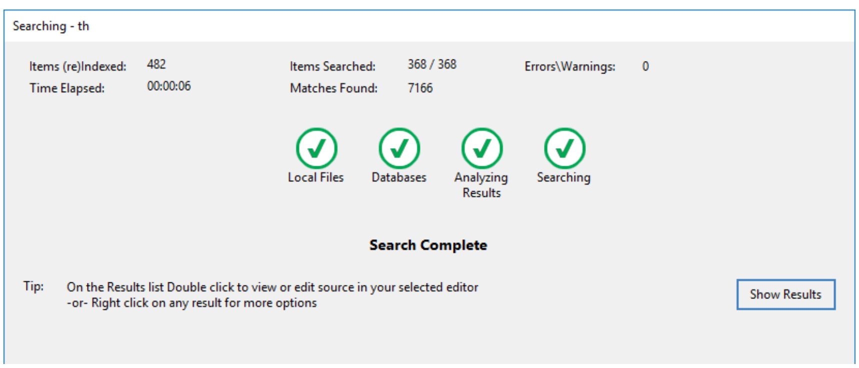
1. At the top of the **Results** window, click to check the **Search within Documents** check-box.



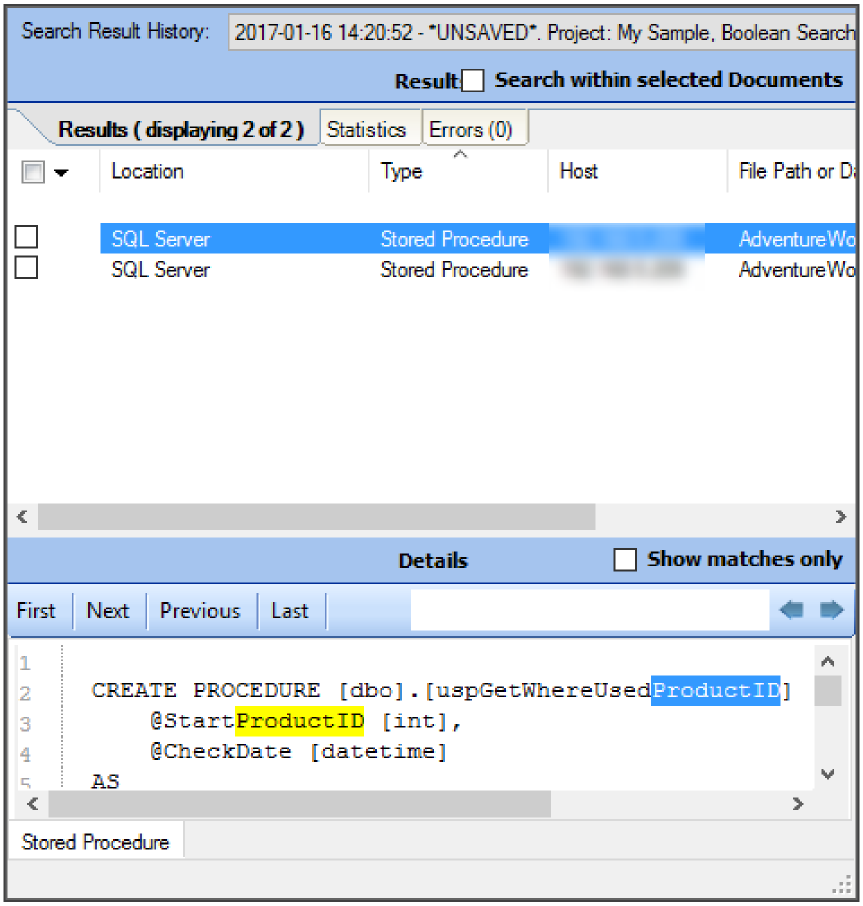
2. On the search bar, enter the desired search text into the **Find** text box.



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.

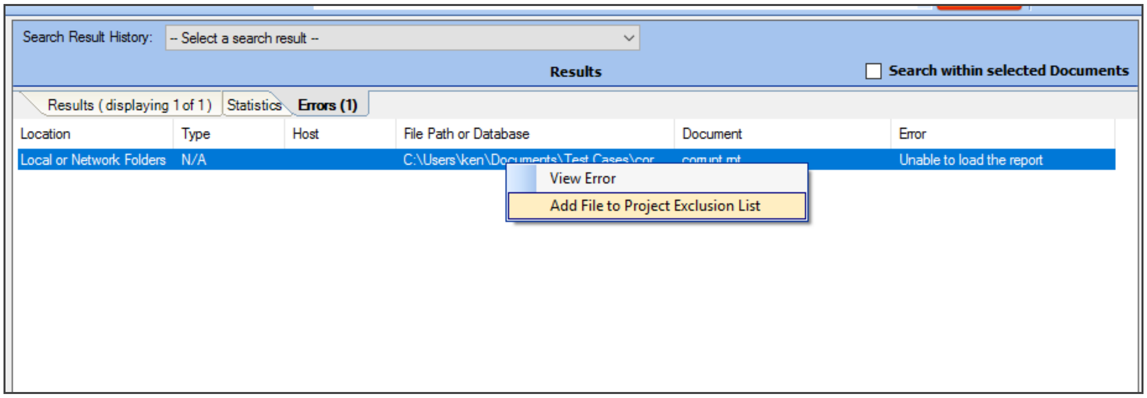
Click on an individual error item for more details. These errors and warnings often provide instructions to resolve the issues logged.

Add an Errant File to the Project Exclusion List

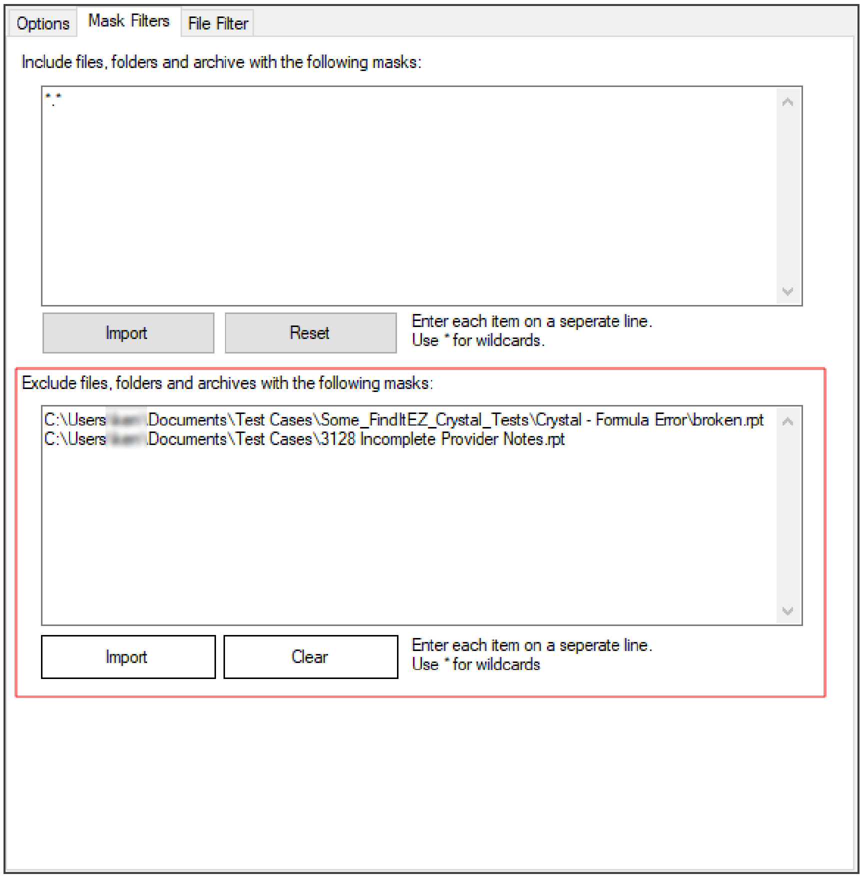
Note: This option is available only for results sourced from Local or Network Folders.

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 Project Exclusion List***. The selected file will be added to the **Exclude File(s) / Folder (s)** list in **Project Settings** `Mask Filters` tab for Local or Network Folders.



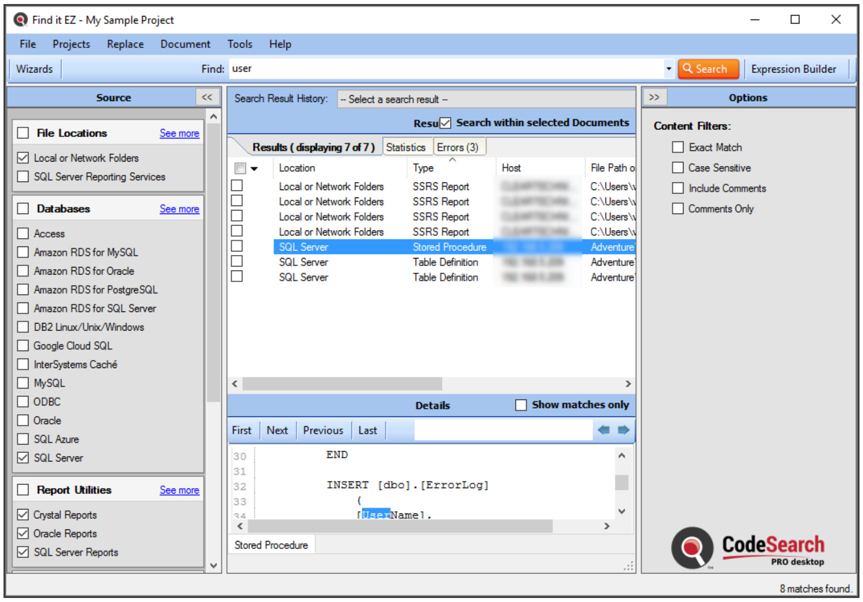
4. Any subsequent search or documentation process will exclude this errand / corrupt file.

See Also:

- "Add File(s) to Project Search Exclusion List" on page 187

View Search Result Details

1. In the **Results** window, click on the result for which you want to view details. See example below:

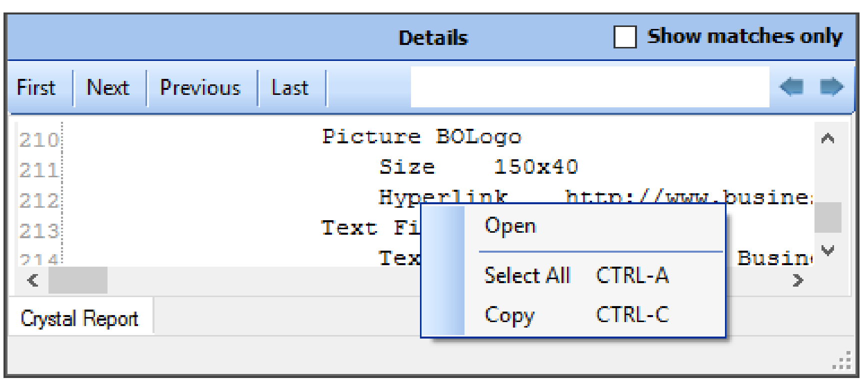


- Details will appear in the **Details** window located below the **Results** window (as above).
- Matches are highlighted in each line where they appear, and lines are numbered.
- To view only those lines with a match, click to check the **Show matches only** check-box. See below.

> Note that the line numbers are hidden when this option is checked.

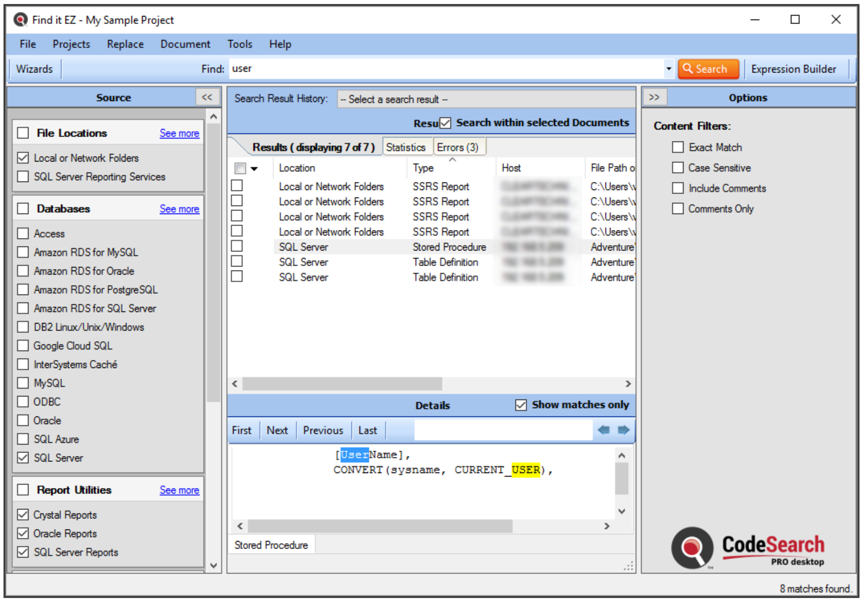
- To search **Details**, enter your search text into the text box and click on the **First**, **Next**, **Previous**, **Last**, or arrow buttons.

- 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).

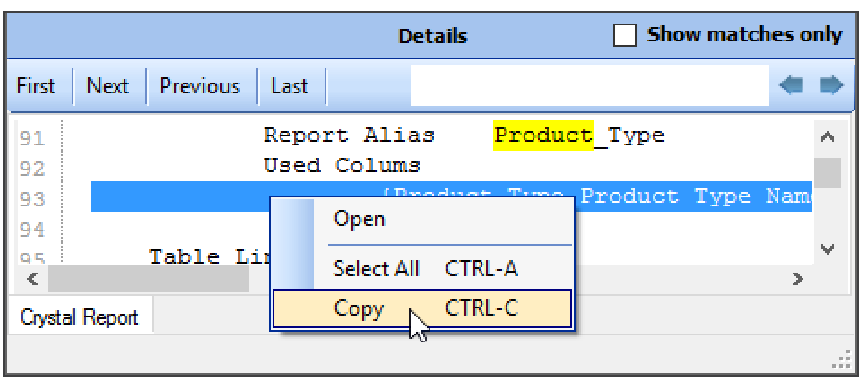
When turned on, you will see the full context of the searched document with line numbers. When turned off, only lines with matches will appear (without line numbers).



> **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.



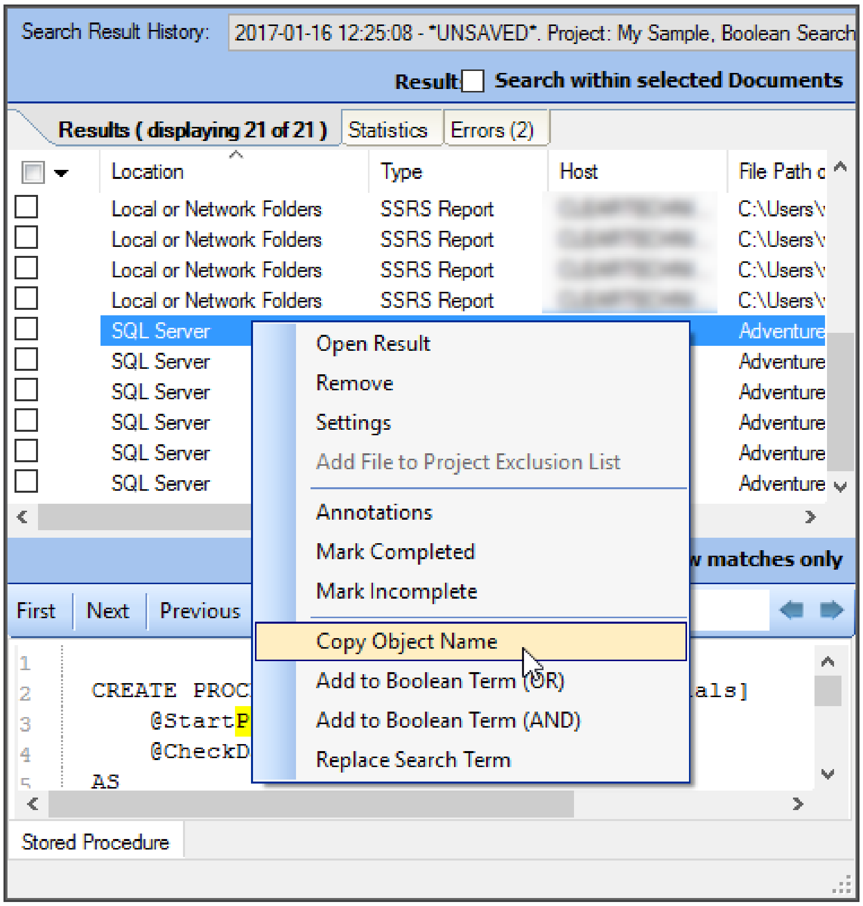
3. From the menu, select ***Copy***. The selected line will be copied to the clipboard.
4. Paste the copied text to the desired target location which can be another program or external editor.

Copy Search Results Document Names

This section describes the steps required to copy a search results match document name to the clipboard, add an document name to the Boolean search term, or replace the Boolean search term with a selected result document name.

Copy Document Name to Clipboard

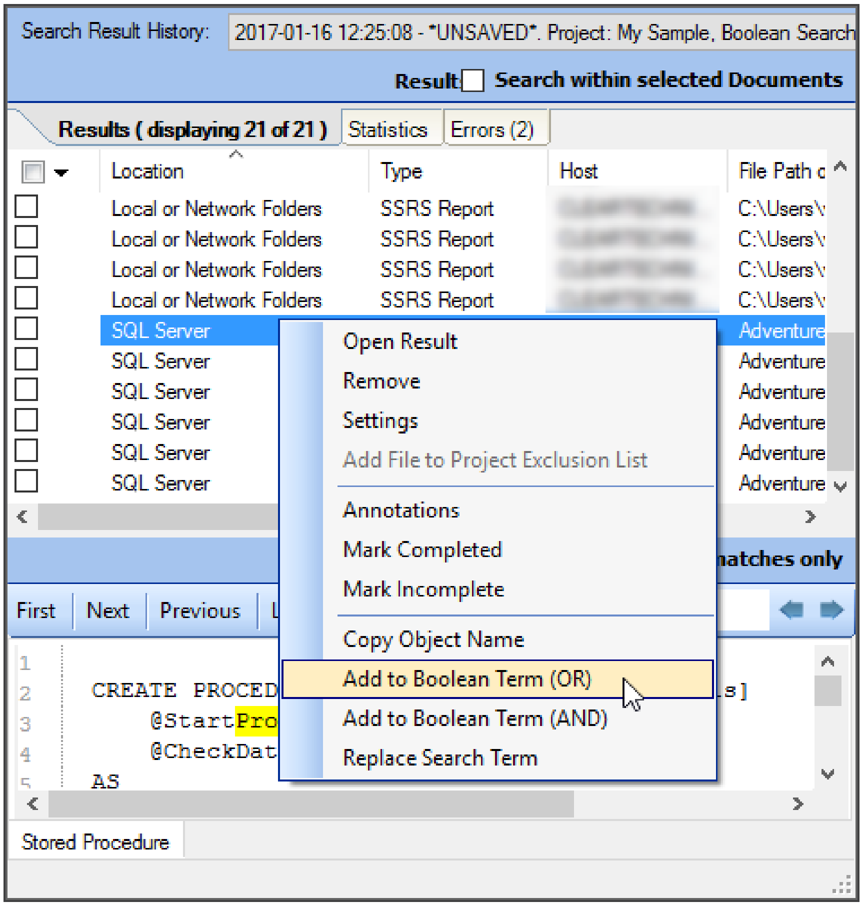
1. In the **Results** list, locate the file (line match) you want to copy the corresponding document name from.
2. Right-click on the file (line match). A context menu will appear.



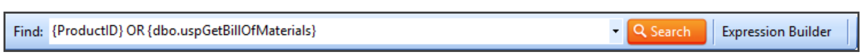
3. From the menu, select ***Copy Object Name***. The name of the selected file (line match) will be added to the clipboard.

Add Object Name to Boolean Search Term

1. In the **Results** list, locate the file (line match) you want to add the corresponding document name as an additional search term in your existing `Find` expression.
2. Right-click on the file. A context menu will appear.

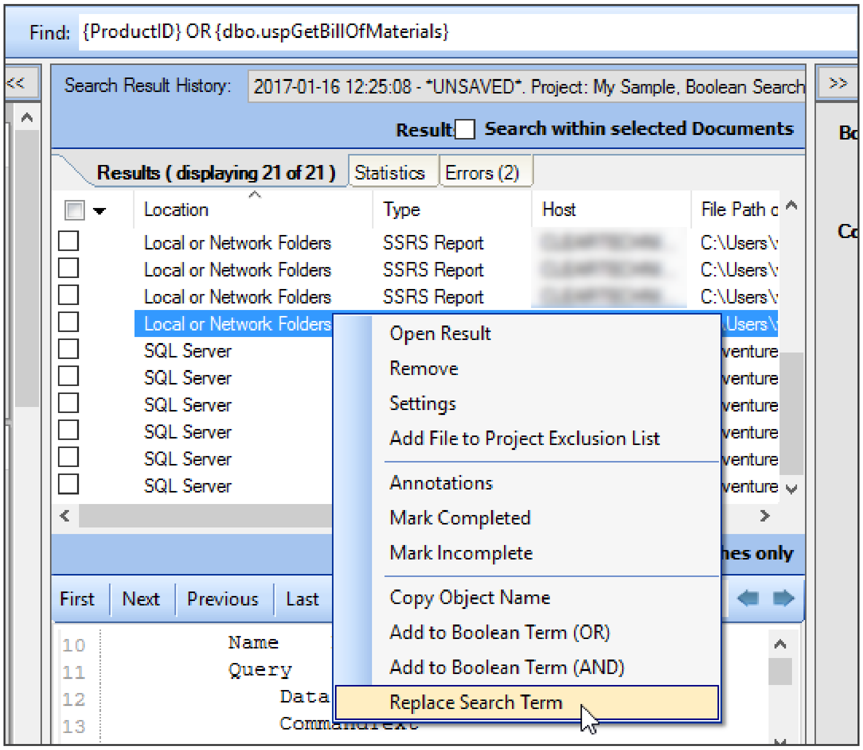


3. From the menu, select ***Add to Boolean Term (OR)*** OR ***Add to Boolean Term (AND)***, as desired. The name of the selected file object will be appended to any existing search term in the **Find** text box (on the search bar) with the selected boolean expression AND / OR operand. See example below:

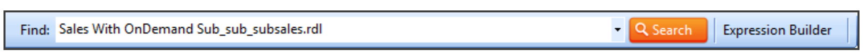


Replace Boolean Search Term

1. In the **Results** list, locate the file (line match) with the corresponding document name you want to use as the next Boolean search term. For example, if you now want to search for all references to the selected document name in your next search.
2. Right-click on the file. A context menu will appear.



3. From the menu, select ***Replace Search Term*** .The name of the selected line match document name will replace any existing search term in the **Find** text box (on the search bar). See example below:



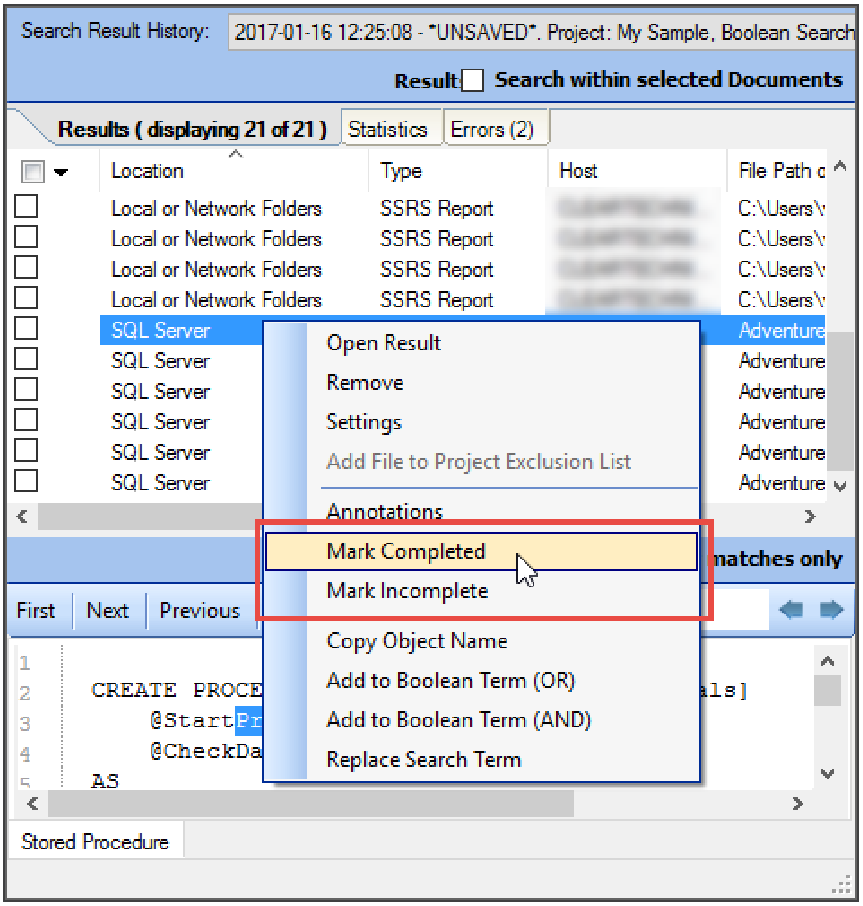
4. Click the **Search** button on the search bar to find all references to that document name within your active project.

Modify Search Results

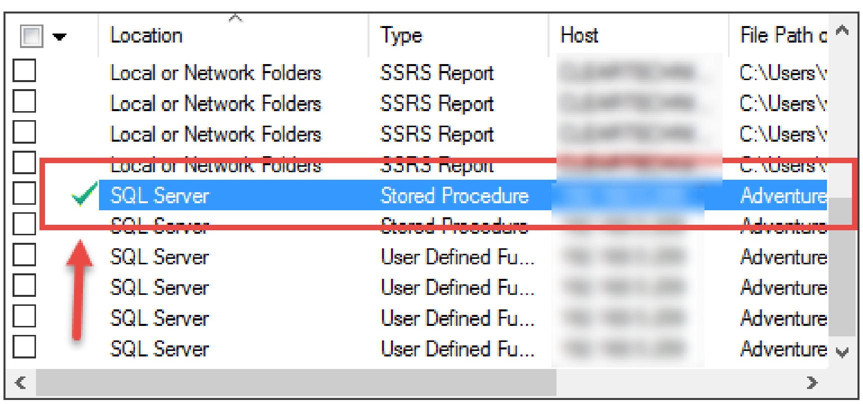
This section provides step-by-step instructions to mark search result items complete or incomplete, add or edit result annotations, remove an item(s) from search results, and to add a file to a project's search exclusion list. You may want to break up a list into smaller sub-lists for redistribution, 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.

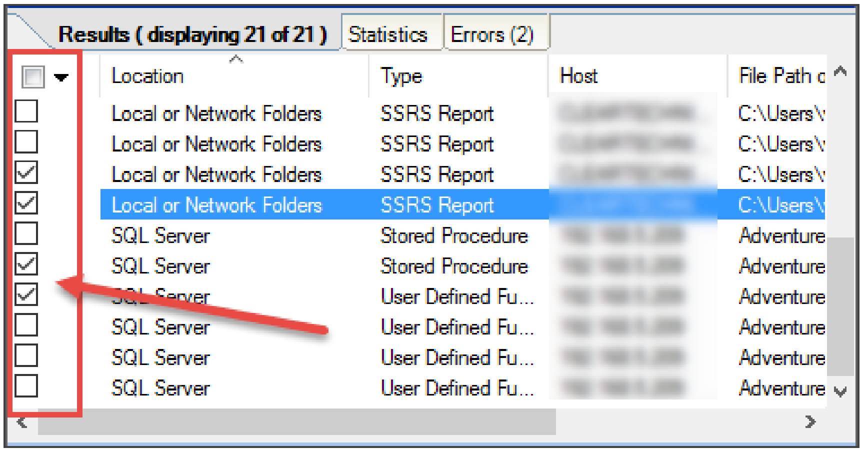


3. Click to select **Mark Completed** or **Mark Incomplete**, as desired.
   - If marked complete, a green check-mark will appear preceding the result.
   - If a completed result is then marked incomplete, the green check-mark will be removed.

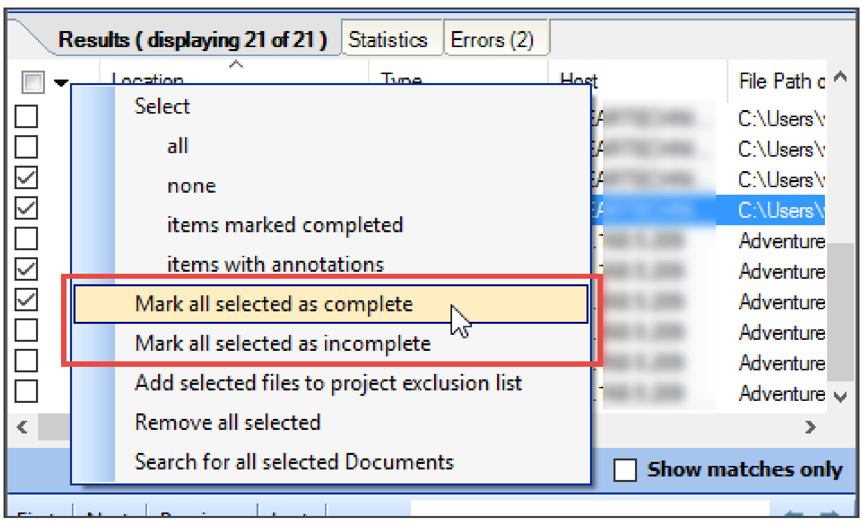


Mark All Complete or Incomplete

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.

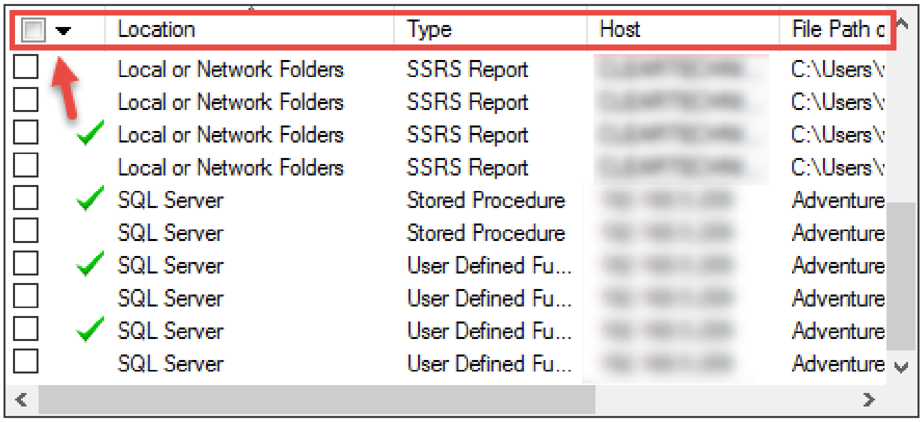
   OR

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.

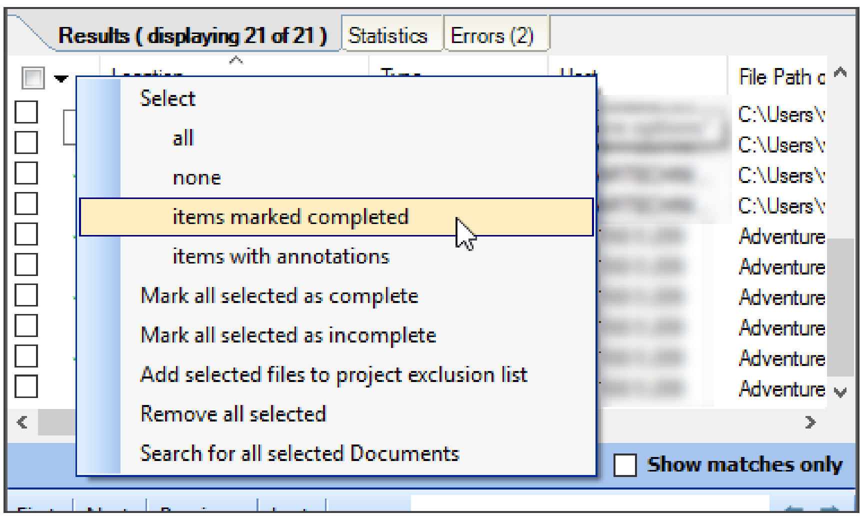
Note: If any search results have been marked complete and you attempt the exit/close the program without first saving your results, you will be prompted to save your search results, continue without saving, or keep the program open.

Select All Items Marked Completed

To locate and select all results that have been marked completed:

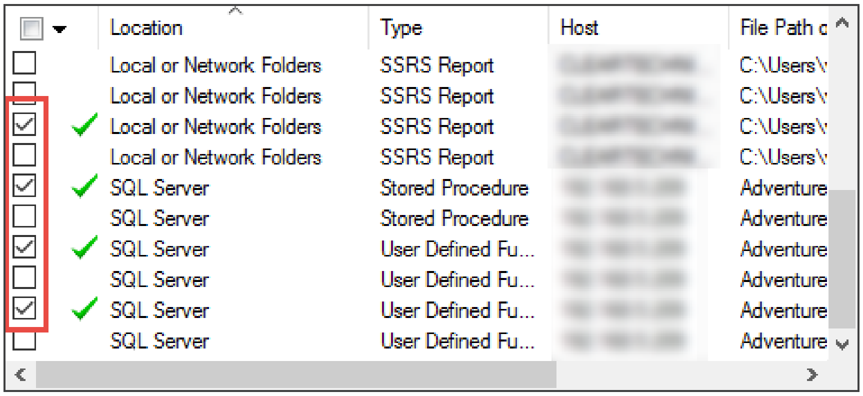


1. In the header of the check-box column, click on the down arrow button. A context menu will appear.



2. From the menu, choose ***Select -> items marked completed***. All results previously marked completed will be selected

(checked).



See Also:

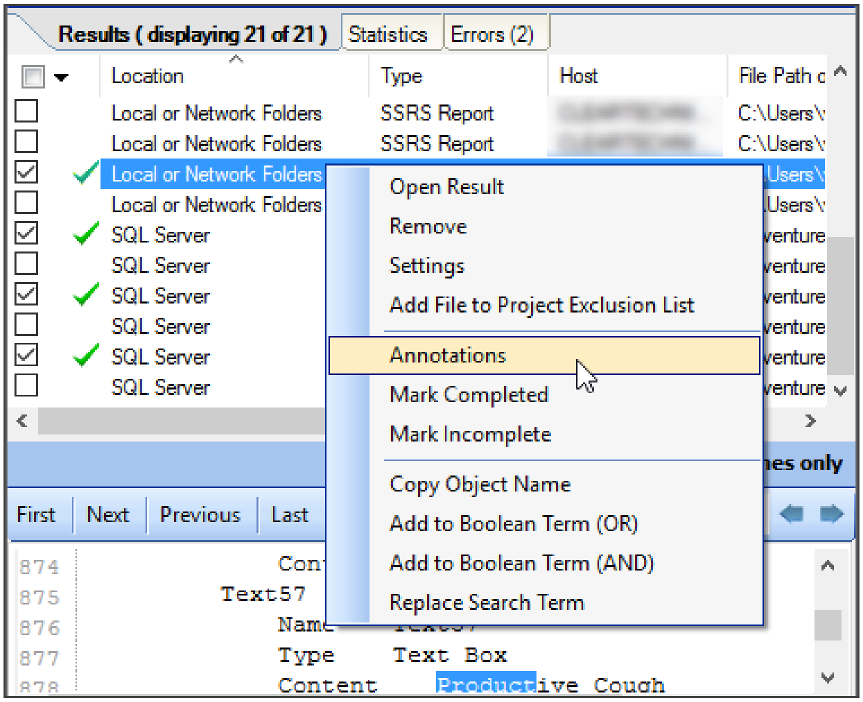
- "Select All Results or None" on page 156

Add or Edit Annotations

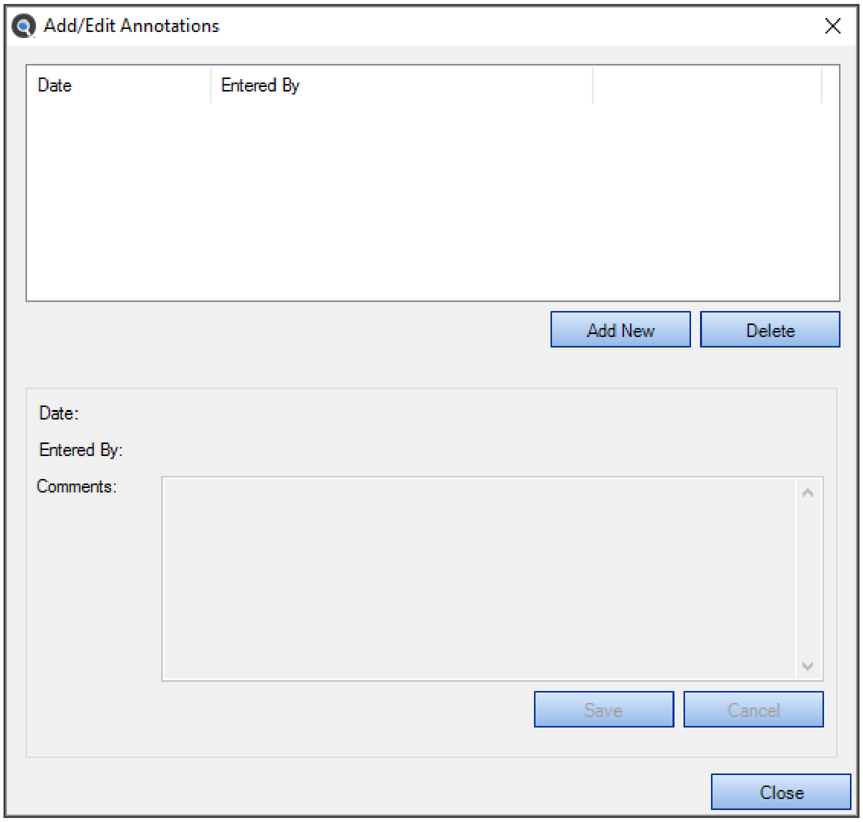
This section outlines the procedures required to add, view, edit, or delete an annotation or to locate and select all items with annotations. Annotations are task assignment or instructions to others or reminders to self for action required on a given search result item. These annotations can then be exported directly to MS Project or distributed via search result lists as a column of information that is included.

Add Annotation

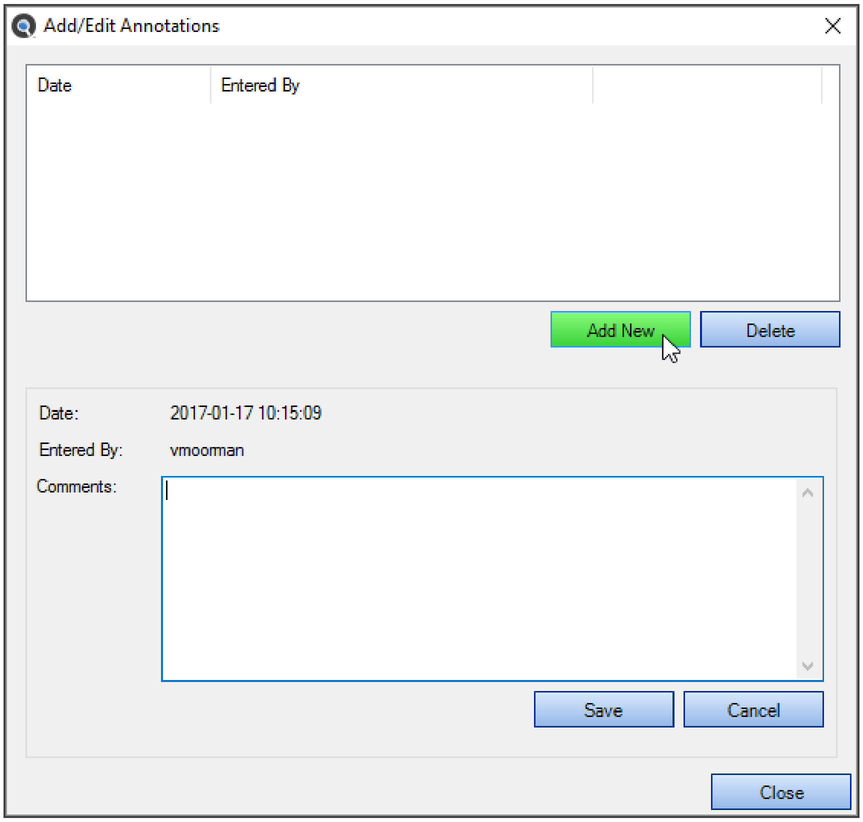
1. In the **Results** window, locate the result to which you want to add an annotation.
2. Right-click on the result row. A context menu will appear.



3. From the menu, select ***Annotations*** . An **Add/Edit Annotations** dialog will appear.

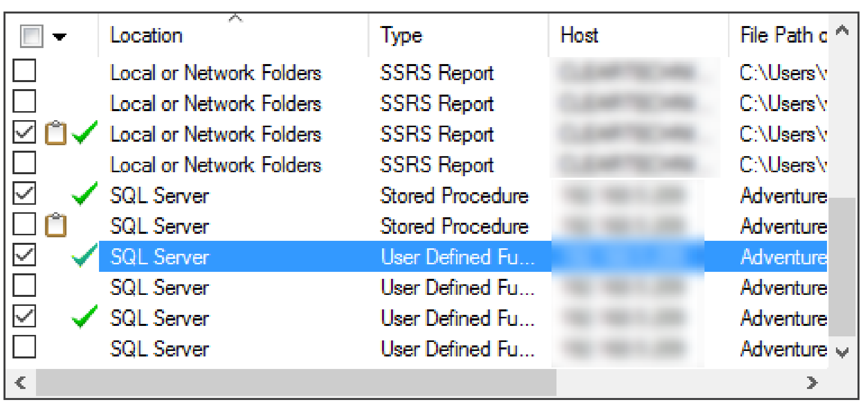


4. Click on the **Add New** button. A new entry will be added, including the current date, time (in the **Date** field), and username (in the **Entered by** field).



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** dialog. 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.

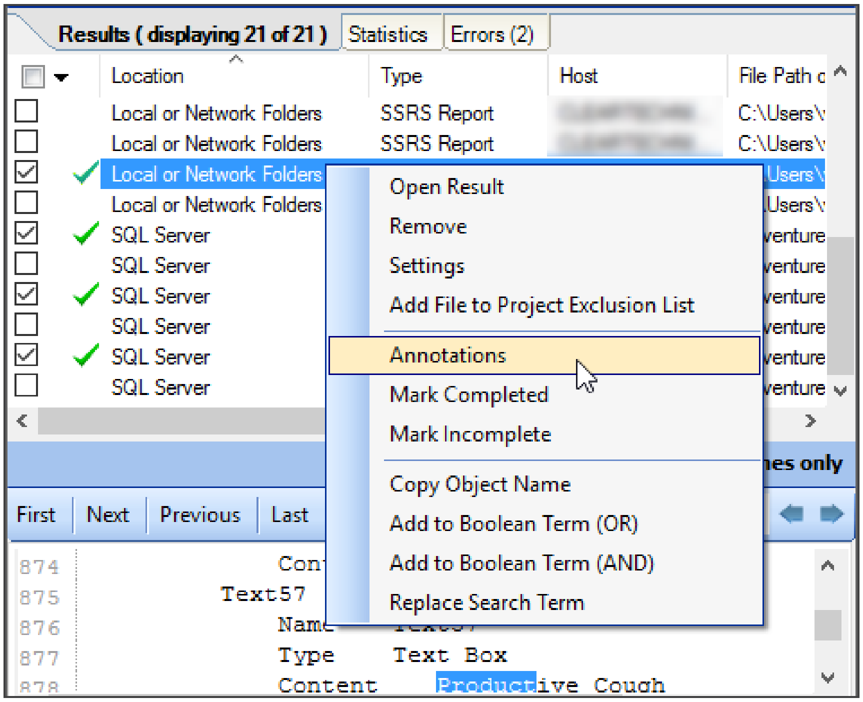
7. To discard any changes, click on the **Cancel** button.

View Annotations

1. In the **Results** window, locate the result for which you want to view annotations.

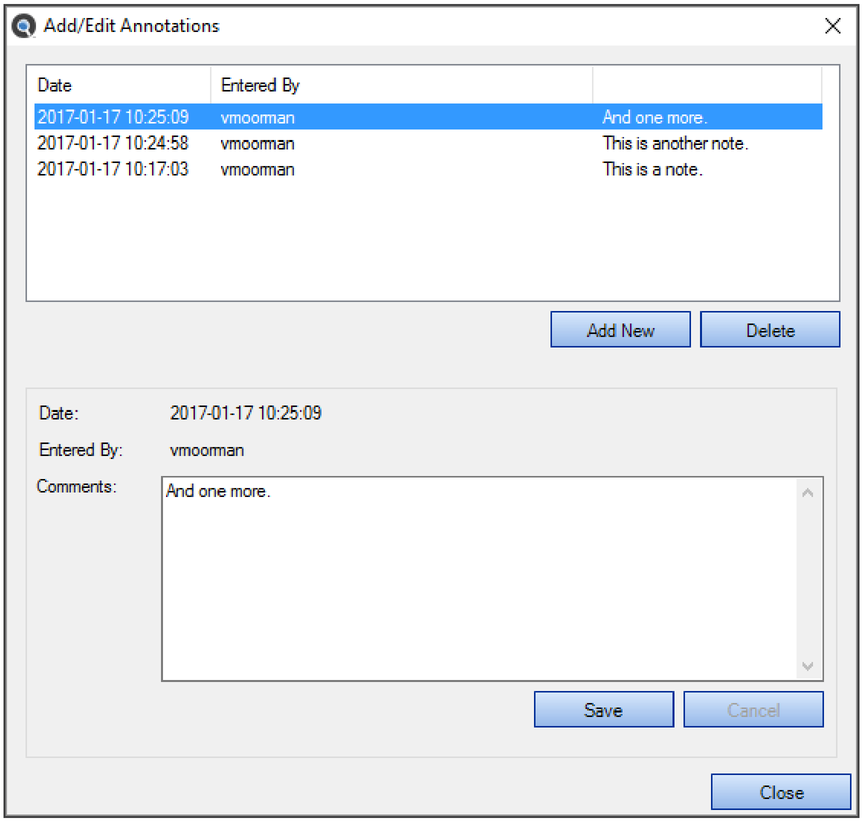
   Note: Results with annotations are preceded by a clipboard icon.

2. Right-click on the result row. A context menu will appear.



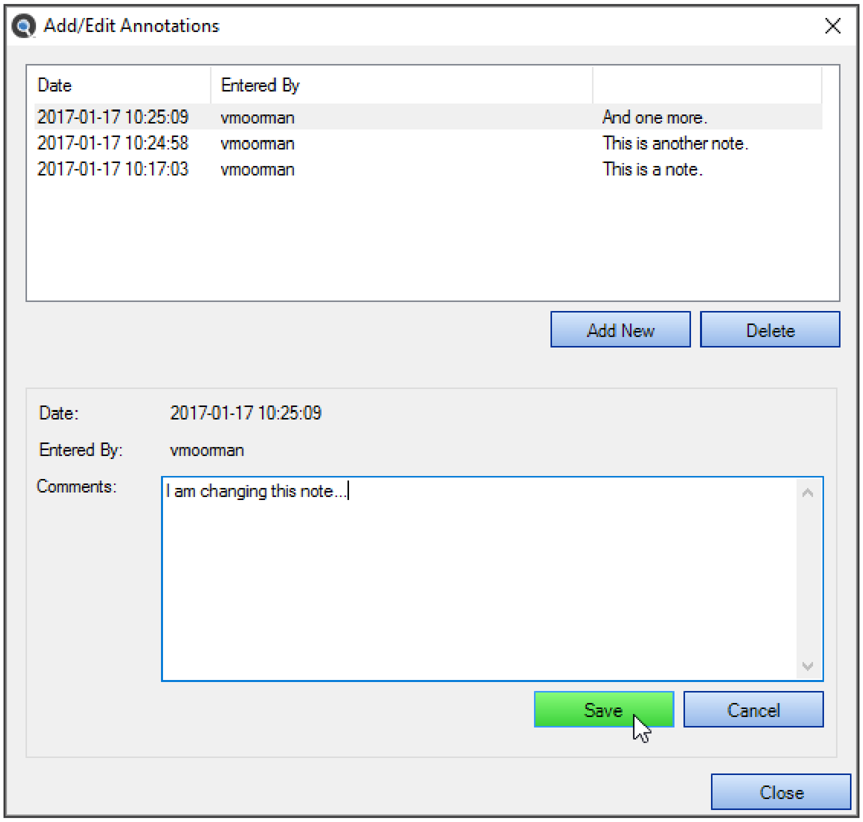
3. From the menu, select ***Annotations***. An **Add/Edit Annotations** dialog will appear. Details for the most recent annotation will be shown by default in the lower section of the dialog. To view another annotation, click to select the desired row (e.g. by

Date or **Entered by**) from the list in the upper section. See example below:

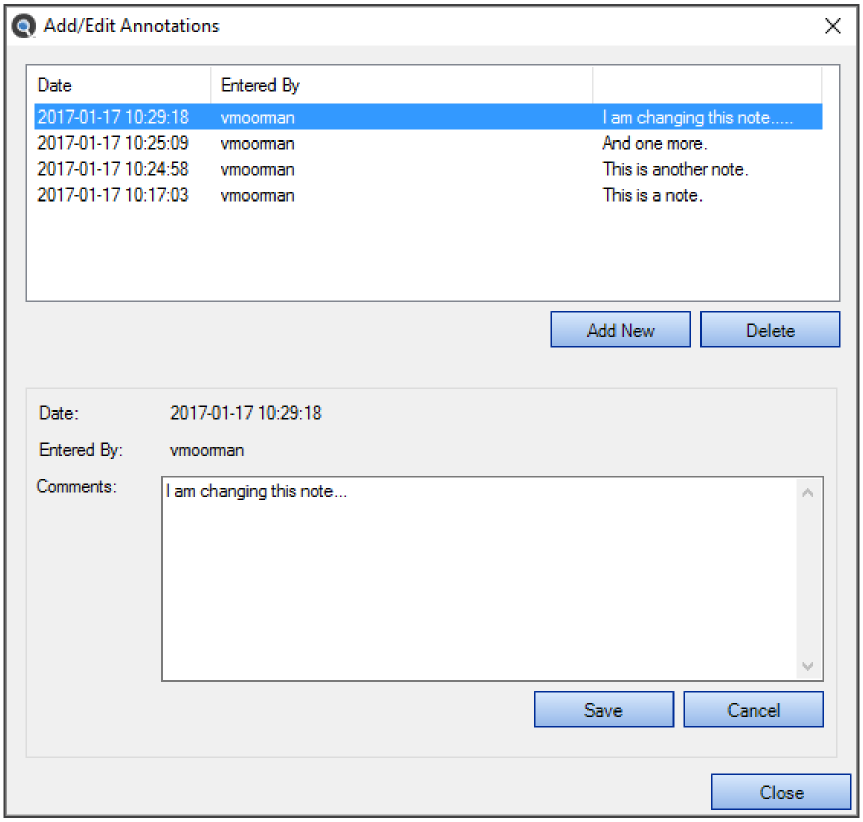


Edit Annotation

1. For the selected annotation, make the desired changes in the **Comments** text box.



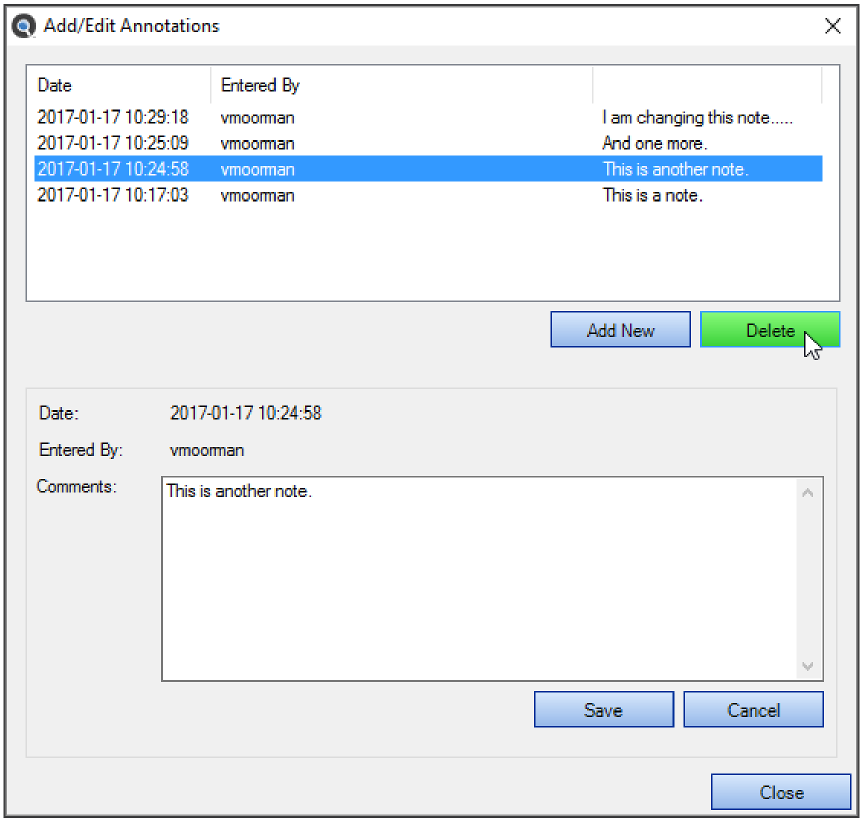
2. Click on the **Save** button to save. A new, dated entry will be generated to include the changes. See example below:



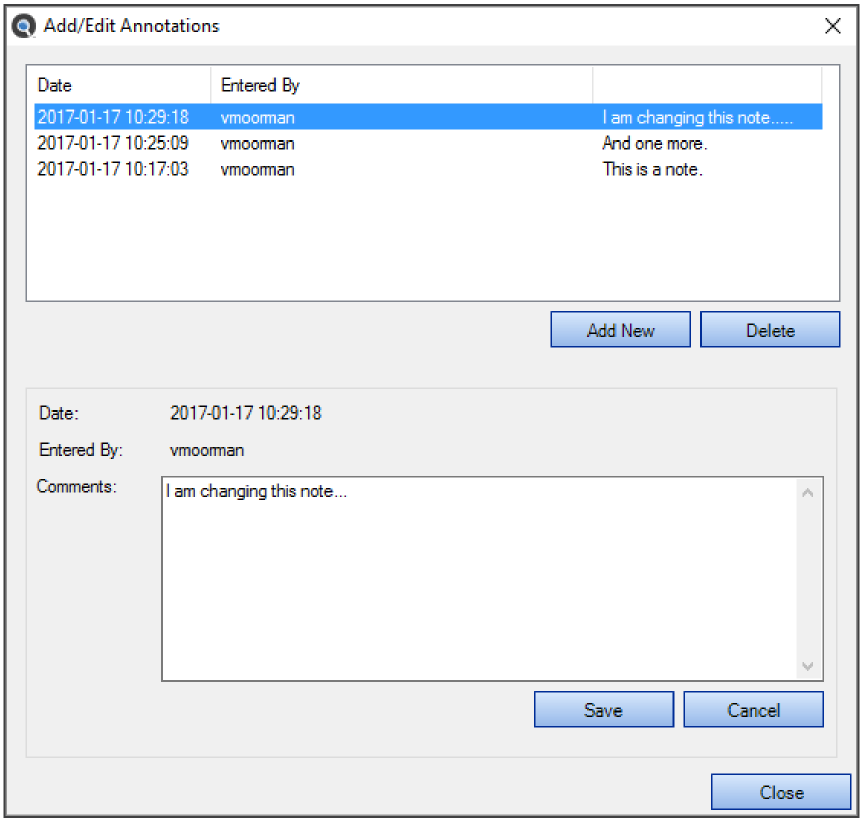
3. To discard your changes, click on the **Cancel** button.

Delete Annotation

1. In the list of annotations, click to select the entry you want to delete.



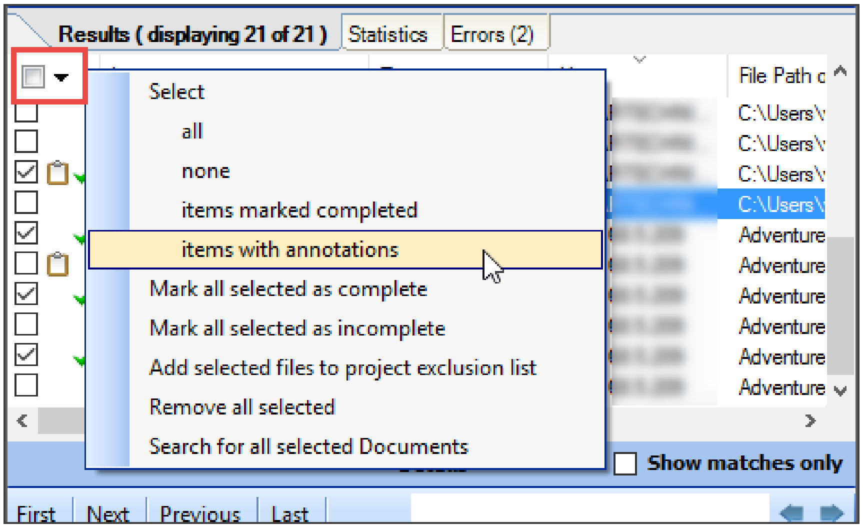
2. Click on the **Delete** button. The selected annotation will be removed from the list. See below:



3. To close the **Add/Edit Annotations** dialog, click on the **X** button.

Select All Items with Annotations

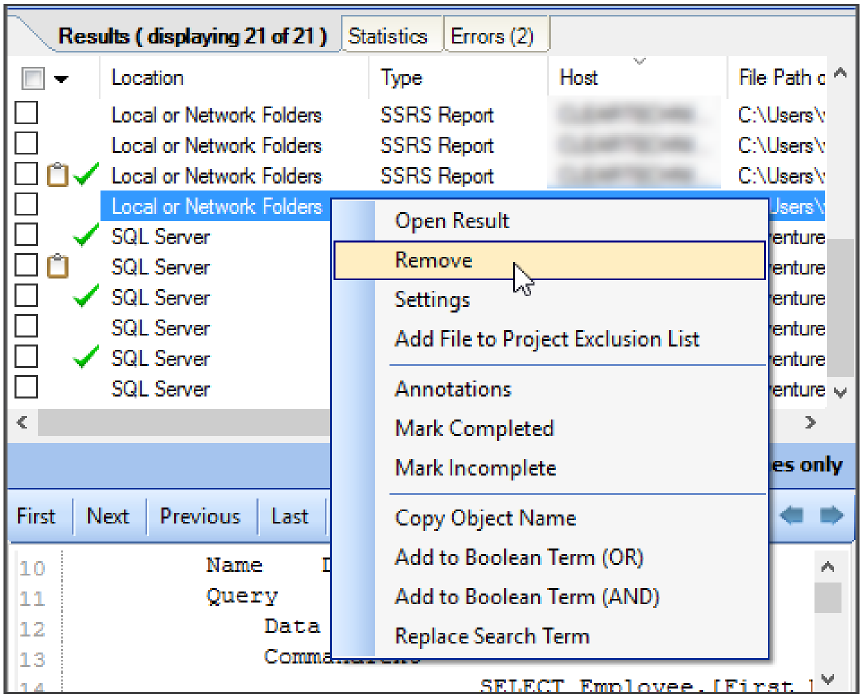
1. In the header of the check-box column, click on the down arrow button. A context menu will appear.



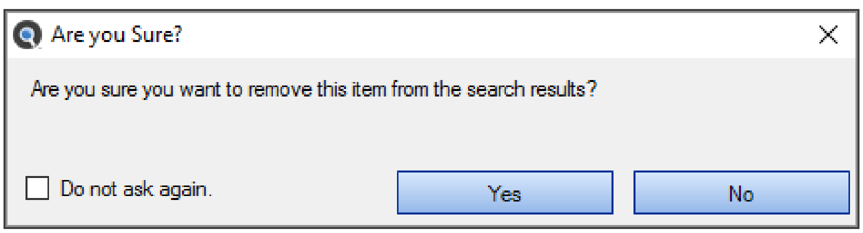
2. From the menu, choose ***Select -> items with annotations***. All results with annotations will be selected (checked).

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.

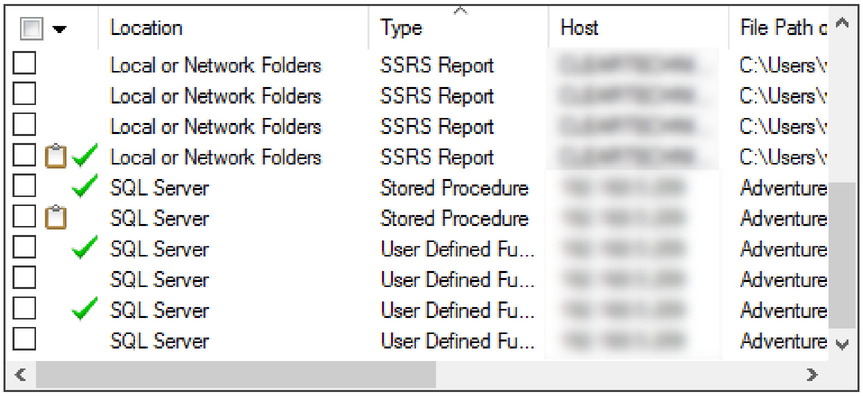


3. From the menu, select ***Remove***. An **Are you sure?** confirmation message will appear.



Tip: To prevent this dialog 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:



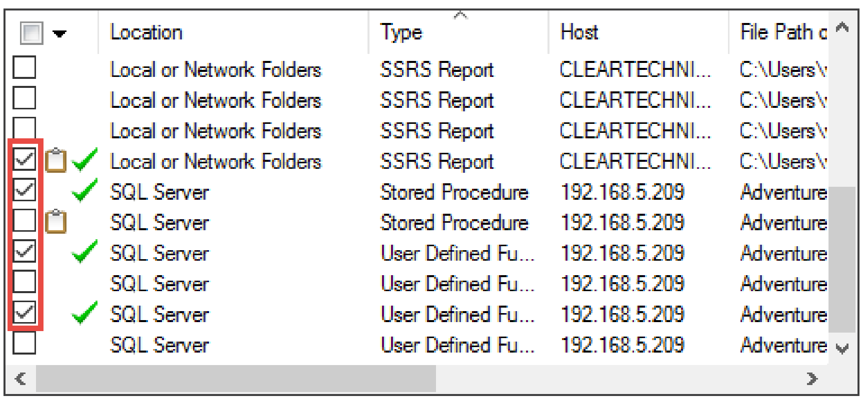
OR

5. To cancel, click on the **No** button.

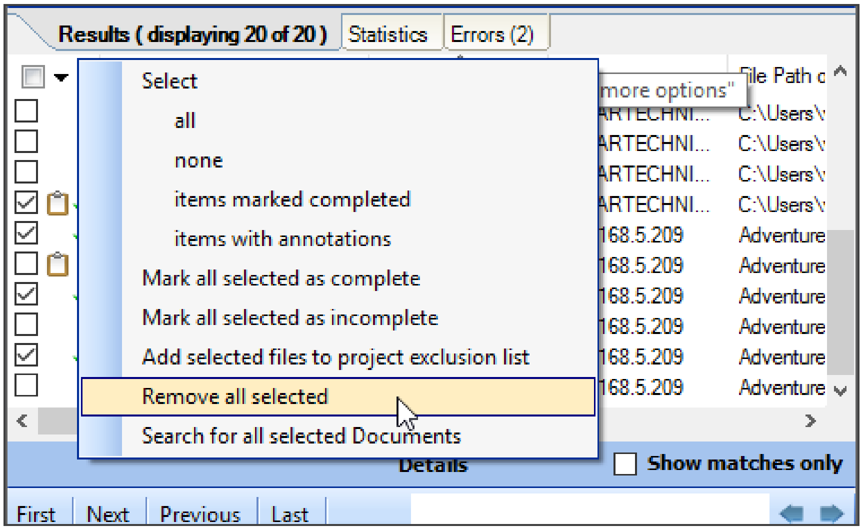
Alert: If you inadvertently delete an item, you can recover by using the “search results history” drop down box to return to the full search list. However, this will reset and roll back all changes since the search was run/loaded.

Remove All Checked Results

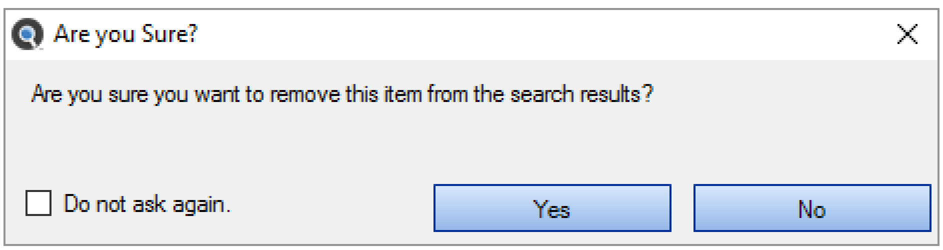
1. In the check-box column, click to select (check) the results you want to remove.



2. In the header of the check-box column, click on the down arrow button. A context menu will appear.

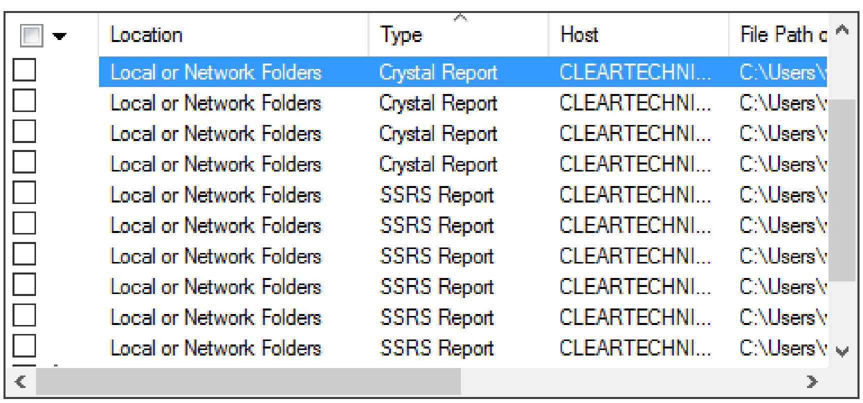


3. From the menu, select ***Remove all checked***. An **Are you sure?** confirmation message will appear.



Tip: To prevent this dialog 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.

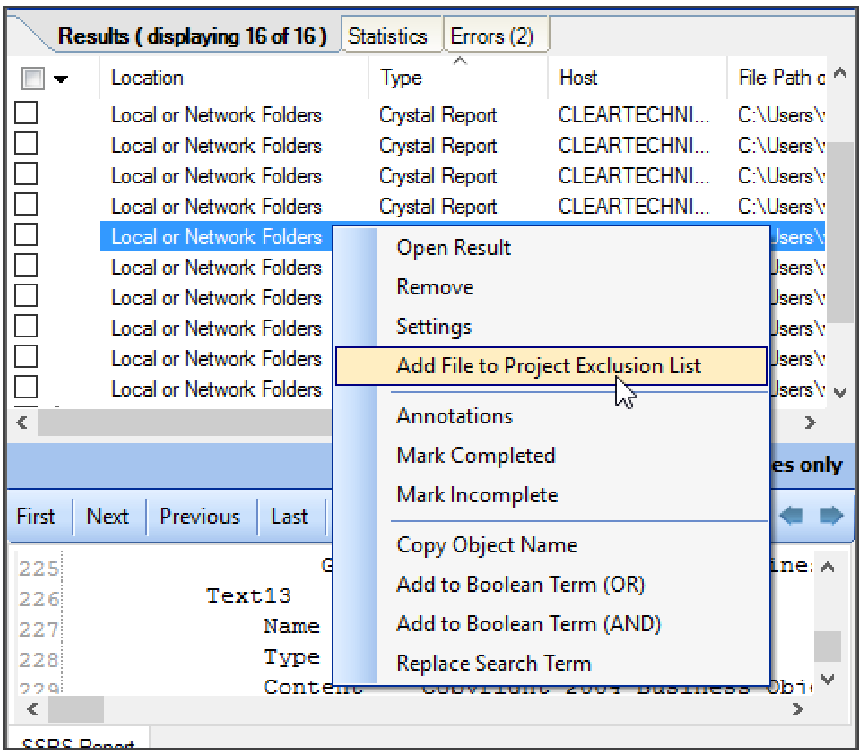
Add File(s) to Project Search Exclusion List

Add a Single File to the Project Exclusion List

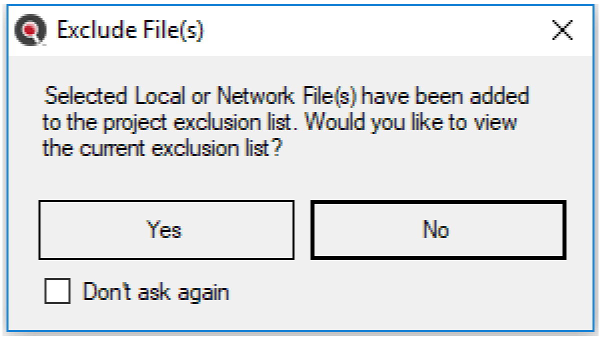
Note: This option is available only for results sourced from Local or Network Folders.

Purpose: If one or more files come up in the Search**Results** tab list, and (for example) the file 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:

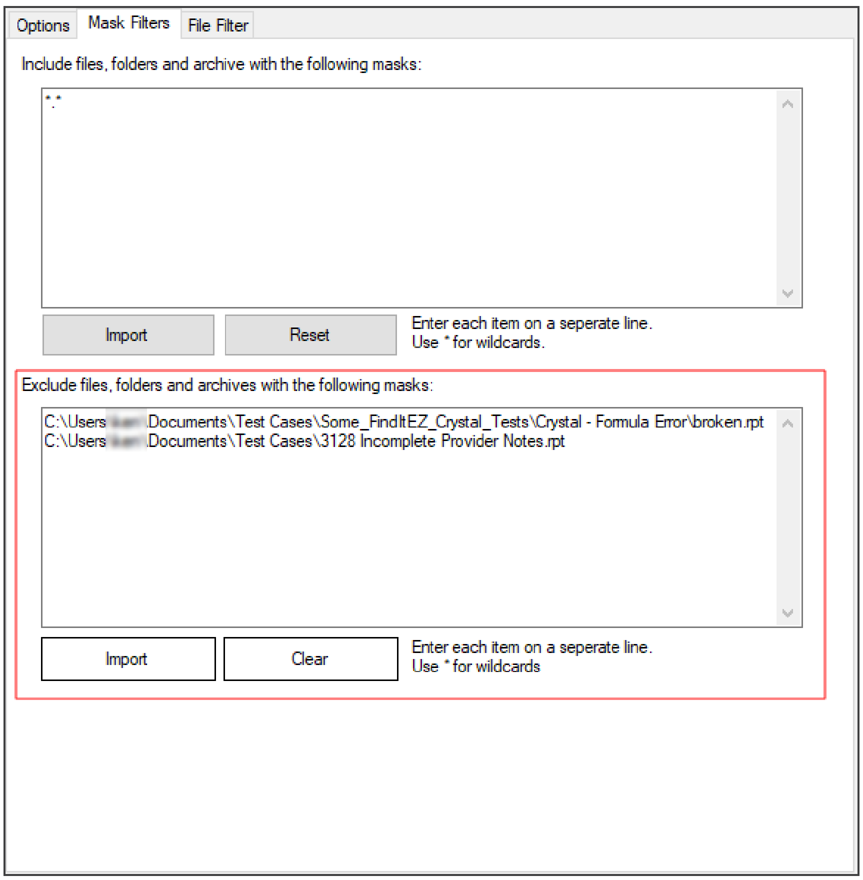
1. In the **Results** list, locate the file that you want to add to the current project's search exclusion list.
2. Right-click on the file. A context menu will appear.



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** **`Mask Filters`** tab for Local or Network Folders.
4. A view request notification will appear, as below:

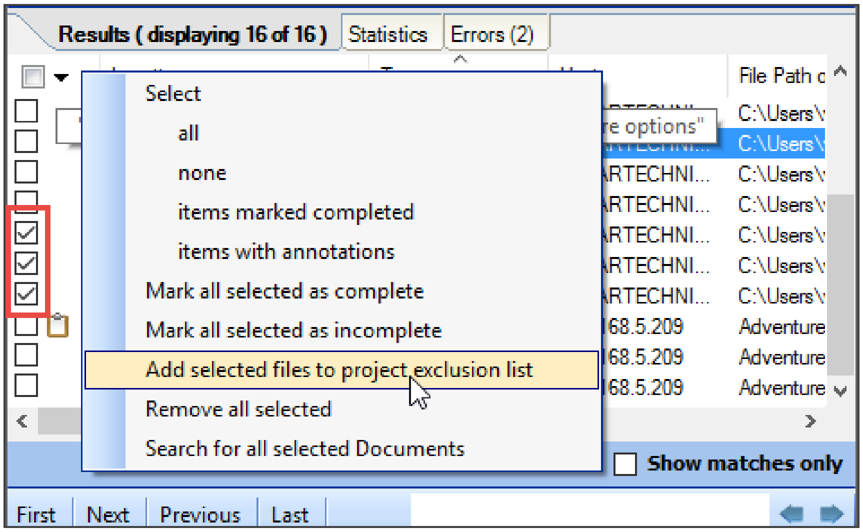


5. To view the current exclusion list, click on the **Yes** button. To cancel, click on the **No** button. See example below:



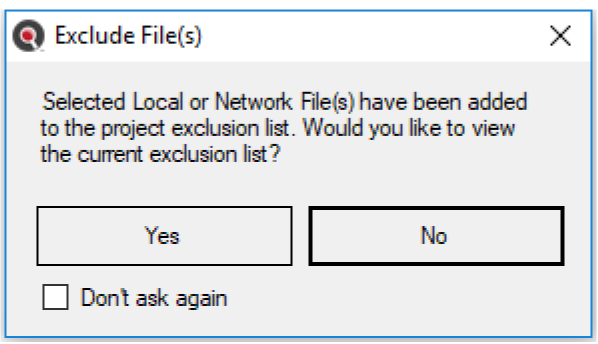
Add Multiple Files to Project Exclusion List

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.

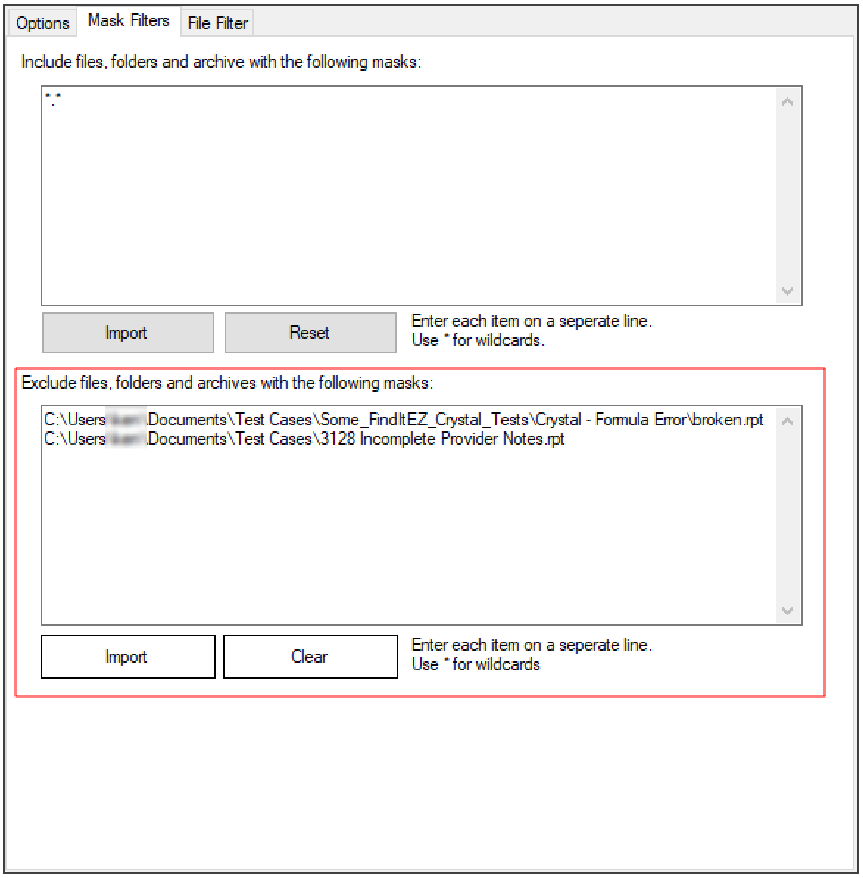


4. From the menu, select **`Add selected files to project exclusion list`**. The selected files will be added to the **Exclude File(s) / Folder(s)** list in **Project Settings** **`Mask Filters`** tab for Local or Network Folders.

5. A view request notification will appear, as below:



6. To view the current exclusion list, click on the **Yes** button (see example below). To cancel, click on the **No** button.



See Also:

- "Add an Errant File to the Project Exclusion List" on page 162
- "Save Search Results" on page 33
- "Export Search Results" on page 36
-

Example Workflow Scenarios

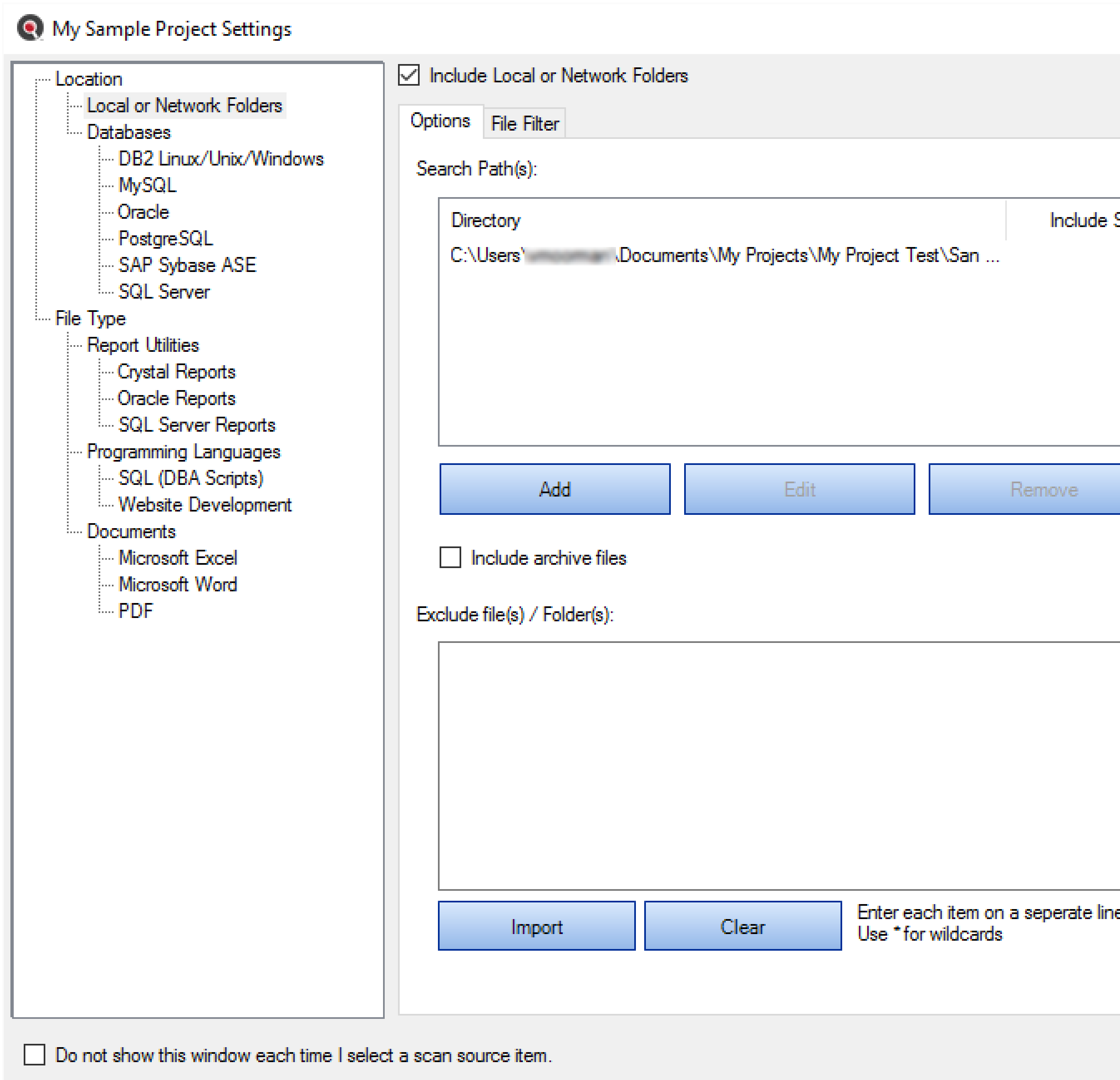
This section provides a number of example scenarios, procedures, and resulting screen shots for searching and reporting in source file locations, databases, and accessing reporting tools.

Source File Locations

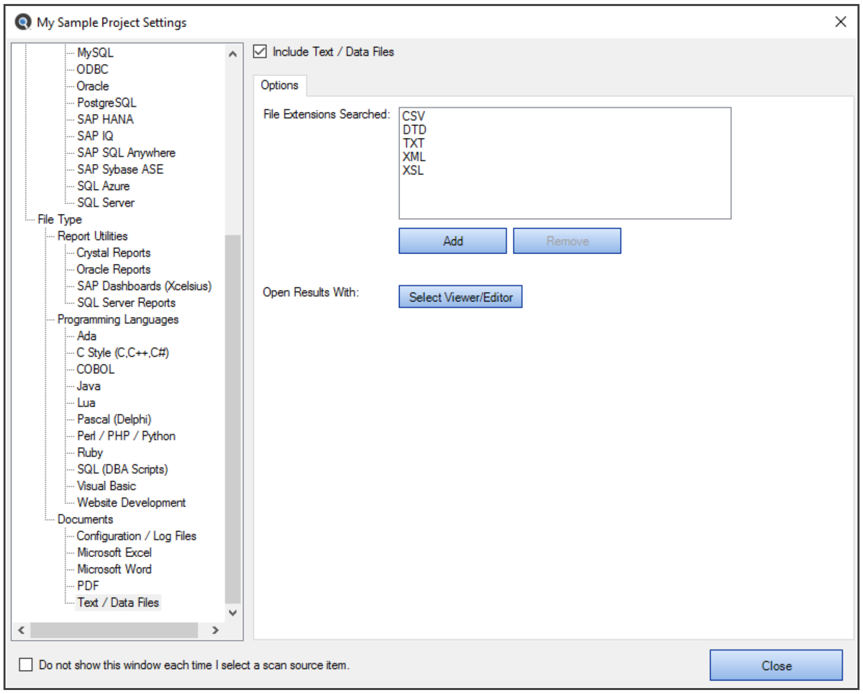
Examples provided in this section include searching local or network folders.

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.



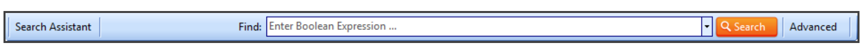
4. From the **Source** frame on the left, click to check one or more supported file type(s). For example, select a file type from the **Documents** category.
5. Configure settings. See example below:

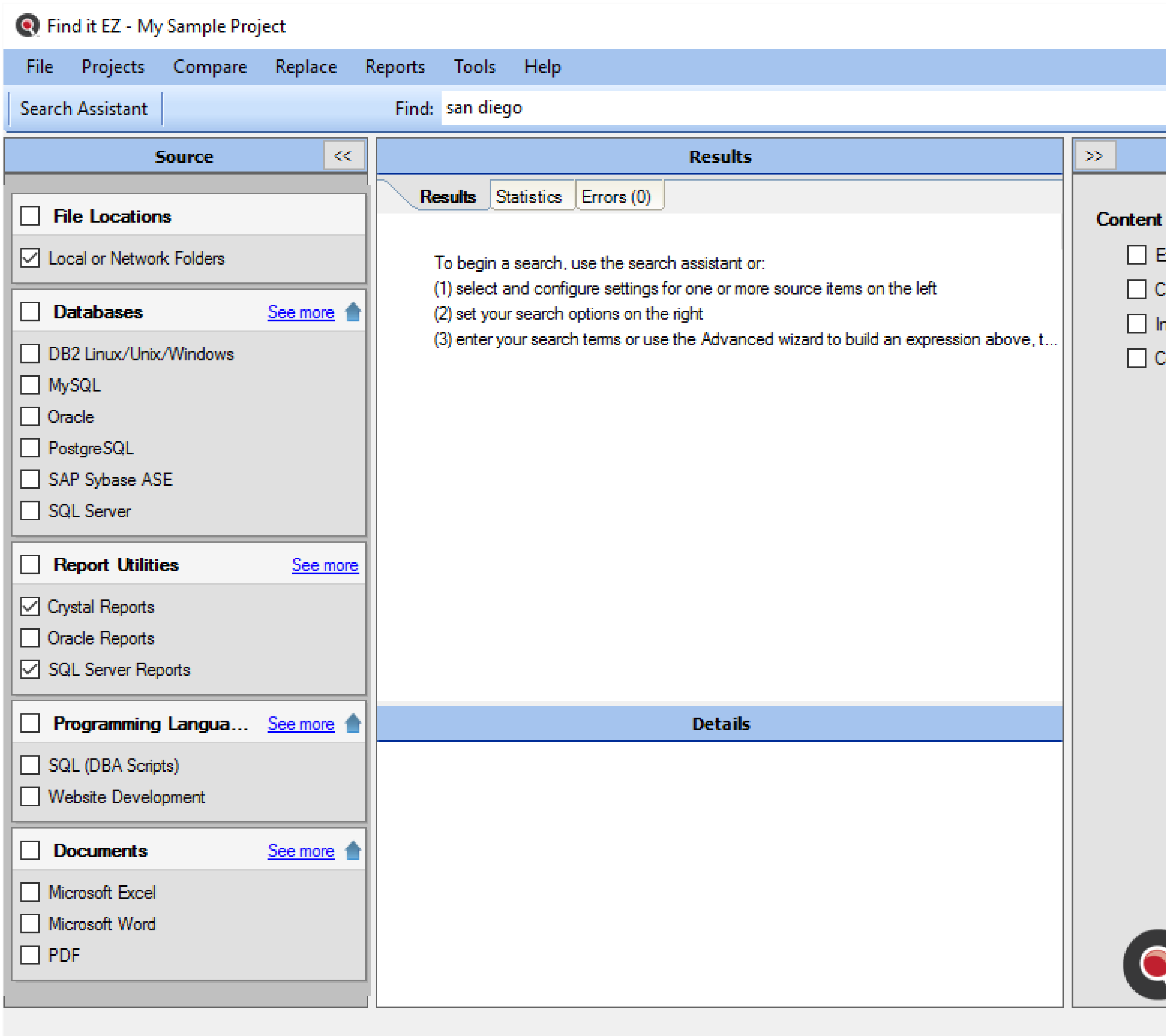


6. From the **Options** frame on the right, select the desired **Content Filters**.

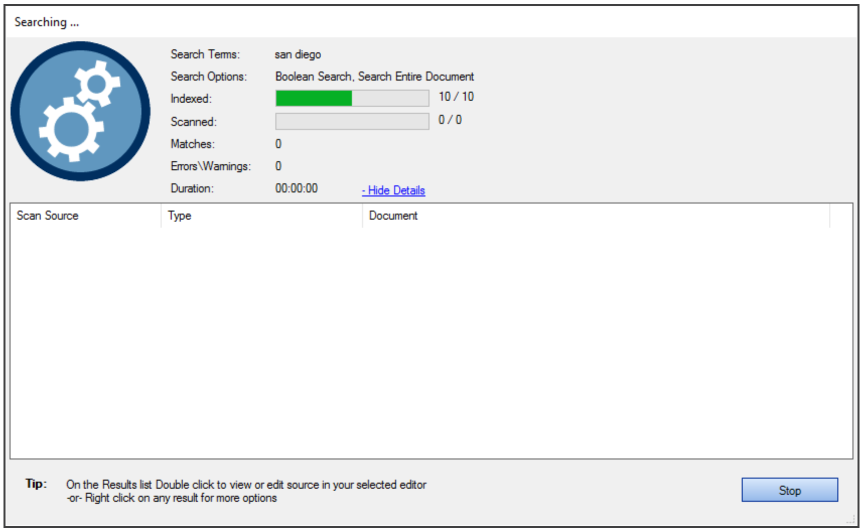
> **Note:** Default search **Options** are: **Search Type** = Boolean with Wildcards Expressions, **Content Filters** = None. Search options can be set 'on program start-up' or changed during 'new project or wizard task' creation to either use the program defaults or to remember your last used settings.

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

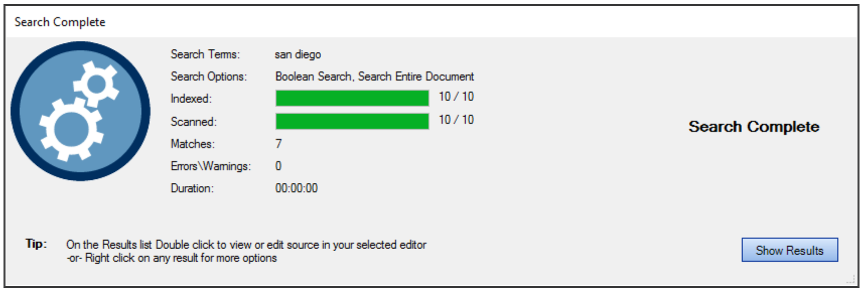




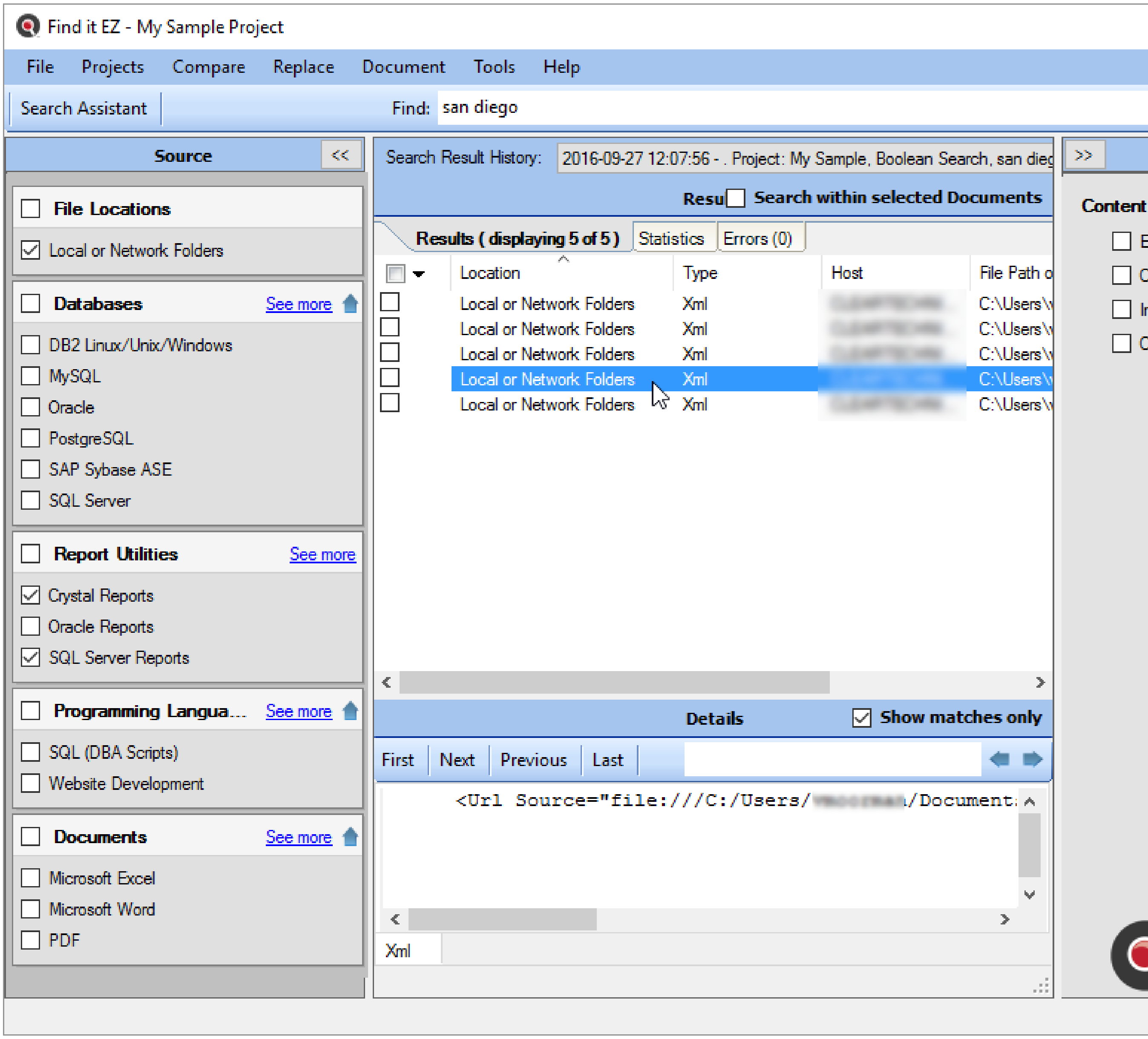
8. Click on the Search button to initiate the search. A **Searching** dialog box will appear, showing the status of the search.



9. Once complete, the **Search Complete** dialog box will appear.

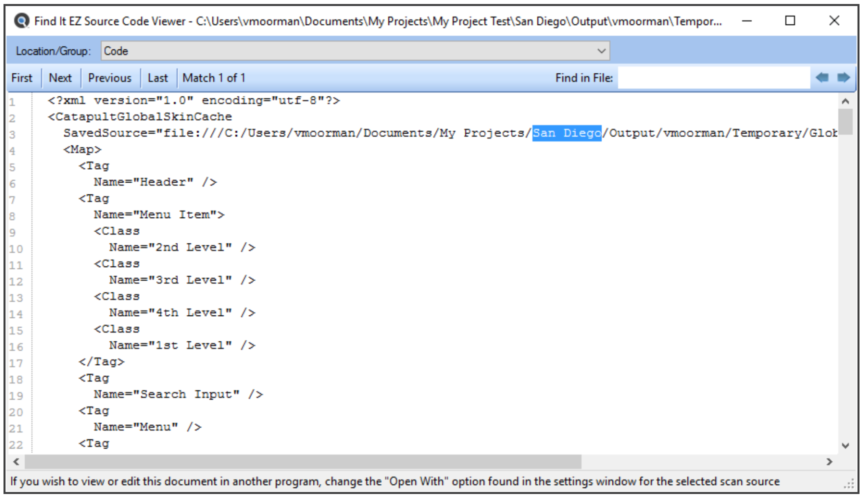


10. Click on the **Show Results** button. A list of results matching your search criteria will appear in the **Results** frame.



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:



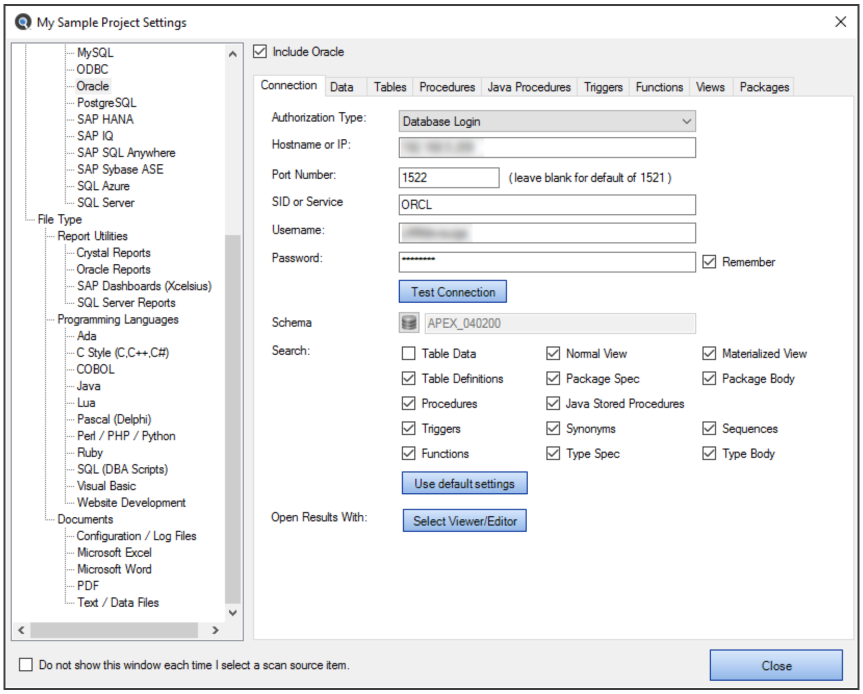
See Also:

- "Search Wizard" on page 115
- "Local or Network Folders" on page 75
- "Configure Source Location(s)" on page 136
- "Local or Network Folders" on page 75
- "File Type" on page 98

Database Examples

Search an Oracle Database

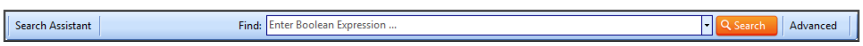
1. From the **Source** frame on the left, click to check **Oracle** in the **Databases** category.
2. Configure settings. See example below:

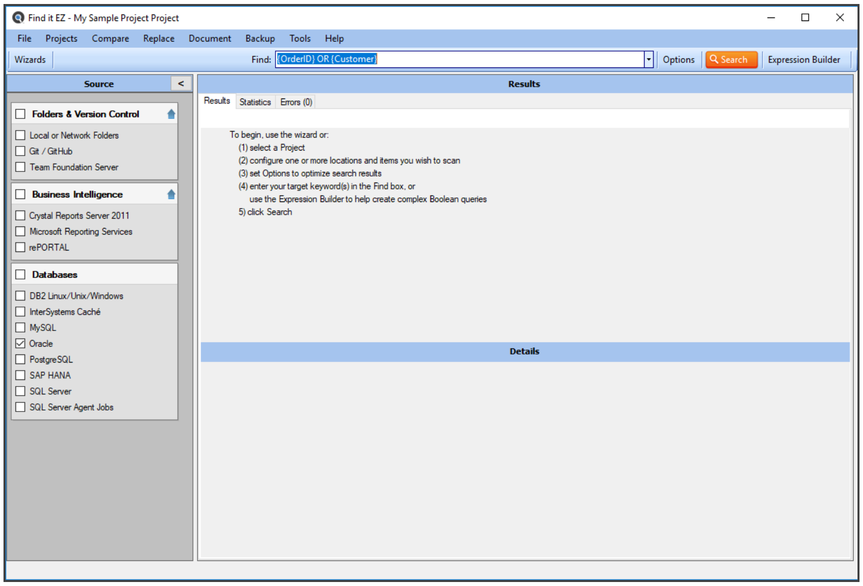


3. Click the **Options** button on the search bar, choose the desired **Content Filters**.

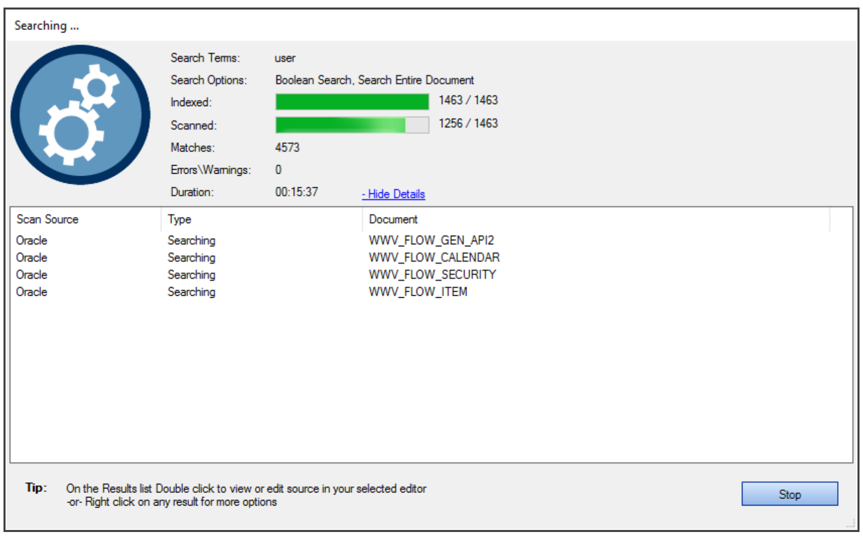
> **Note:** Default search **Options** are:**Content Filters** = None. Search options can be set 'on program start-up' or changed during 'new project' or 'new wizard task' configuration to use this default or to remember your last used settings.

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

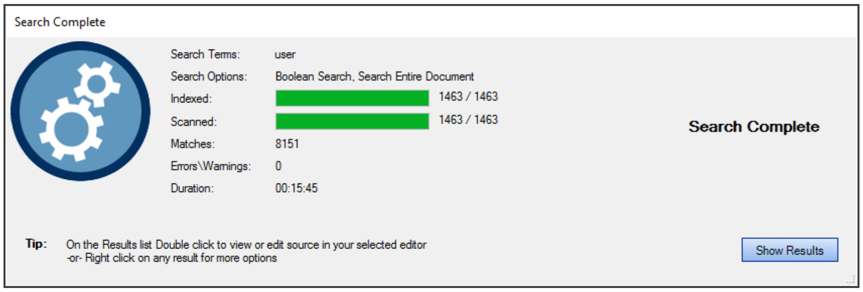




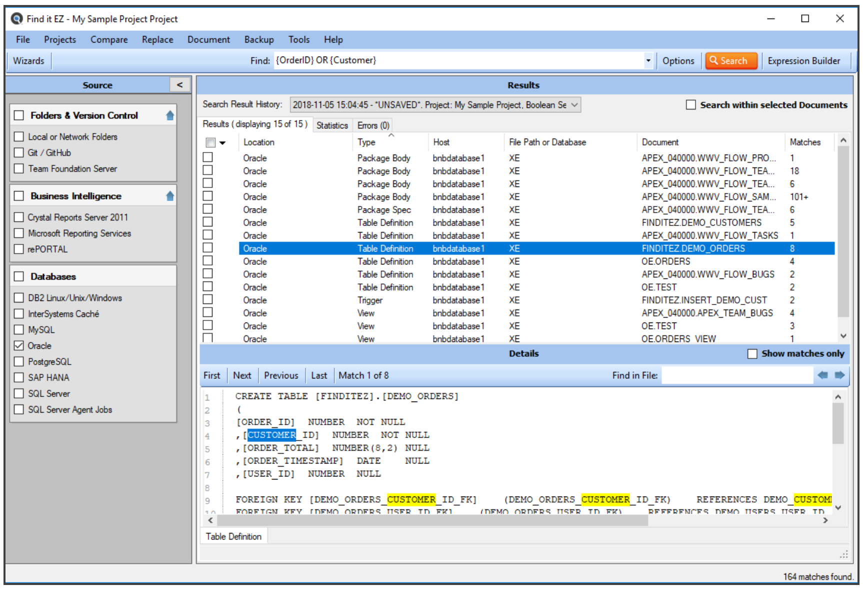
5. Click on the **Search** button to initiate the search. A **Searching** dialog box will appear, showing the status of the search. See example below:



6. Once complete, the **Search Complete** dialog box will appear.



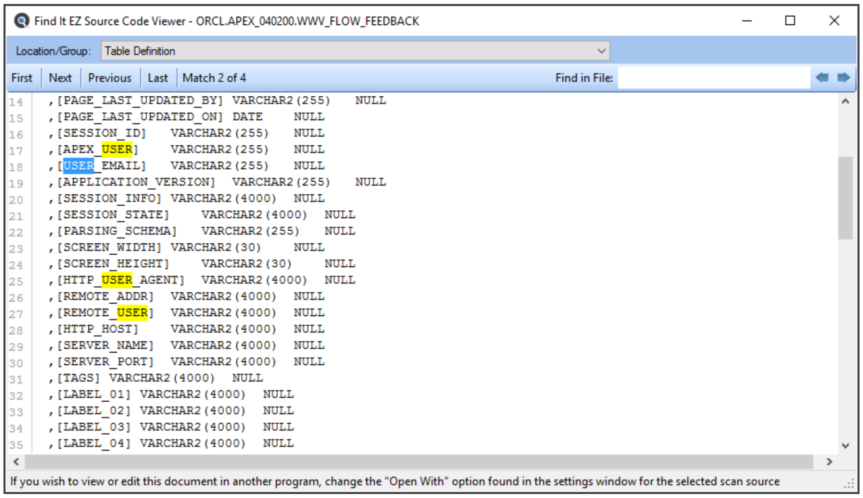
7. Click on the **Show Results** button. A list of results matching your search criteria will appear in the **Results** frame. See example below:



Note: After performing a search, settings can be saved to a Project for later use again.

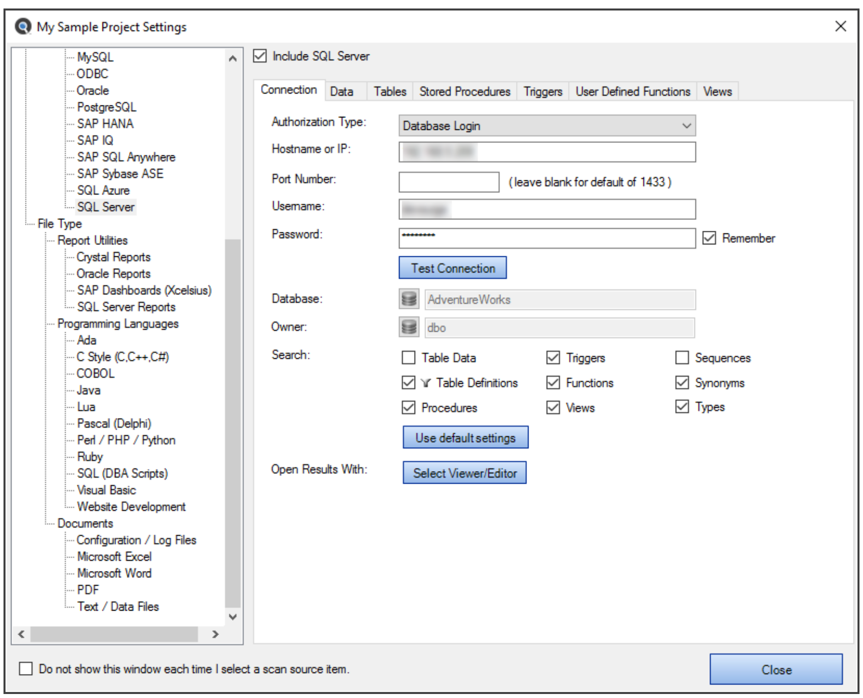
8. To view details for a result, click on a row in the **Results** window. Details will appear in the **Details** window. See example above.

9. 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

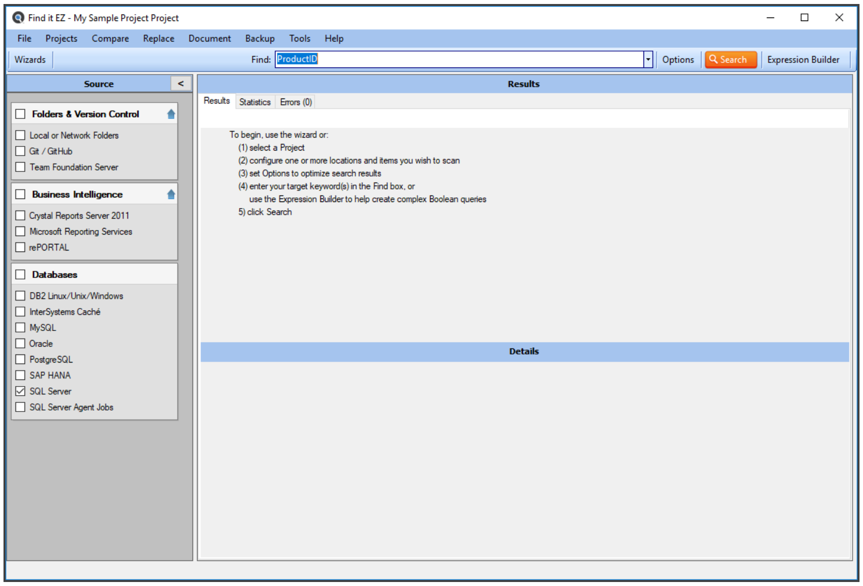
1. From the **Source** frame on the left, click to check **SQL Server** in the **Databases** category.
2. Configure settings. See example below:



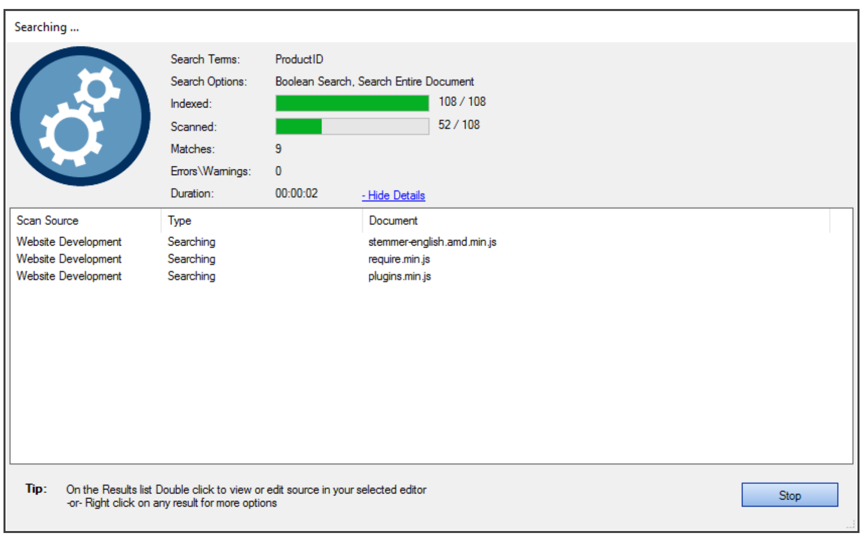
3. Click the **Options** button on the search bar, choose the desired **Content Filters**.

> **Note:** Default search **Options** are:**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.

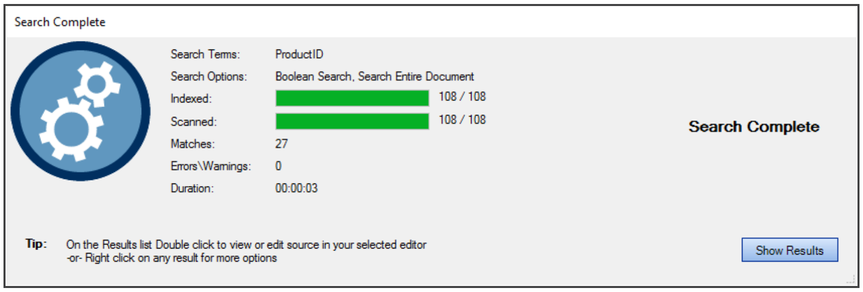
4. On the search bar (see image below), enter the desired search text into the **Find** text box.



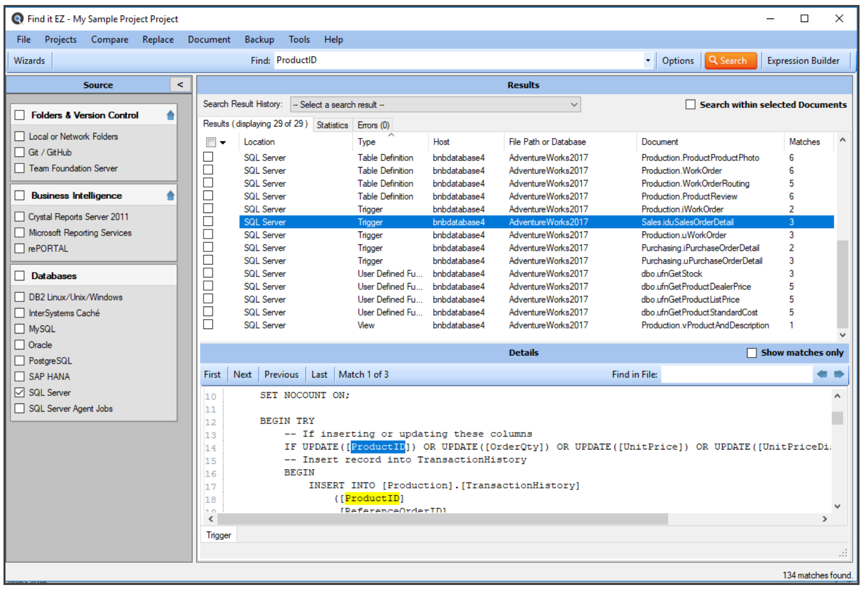
5. Click on the **Search** button to initiate the search. A **Searching** dialog box will appear, showing the status of the search. See example below:



6. Once complete, the **Search Complete** dialog box will appear.



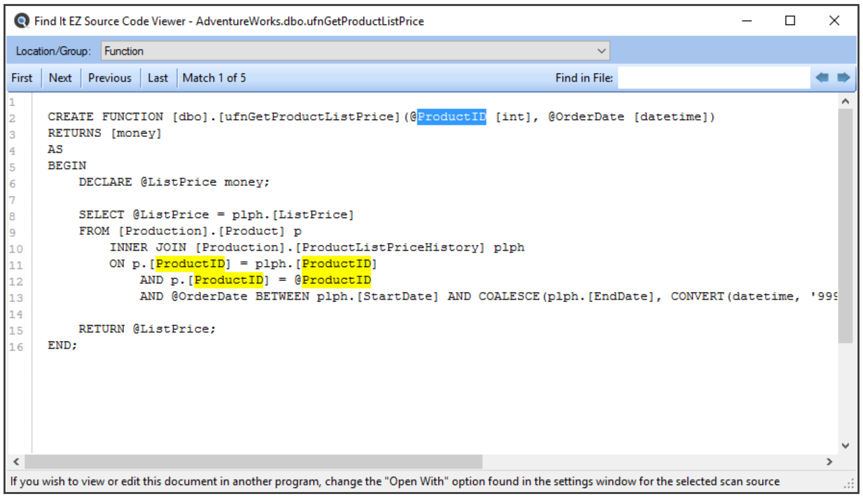
7. Click on the **Show Results** button. A list of results matching your search criteria will appear in the **Results** frame. See example below:



Note: After performing a search, settings can be saved to a Project for later use again.

8. To view details for a result, click on a row in the **Results** window. Details will appear in the **Details** window. See example above.

9. To view the source file, right-click on a detail line and select ***Open*** from the context menu. See example below:



See Also:

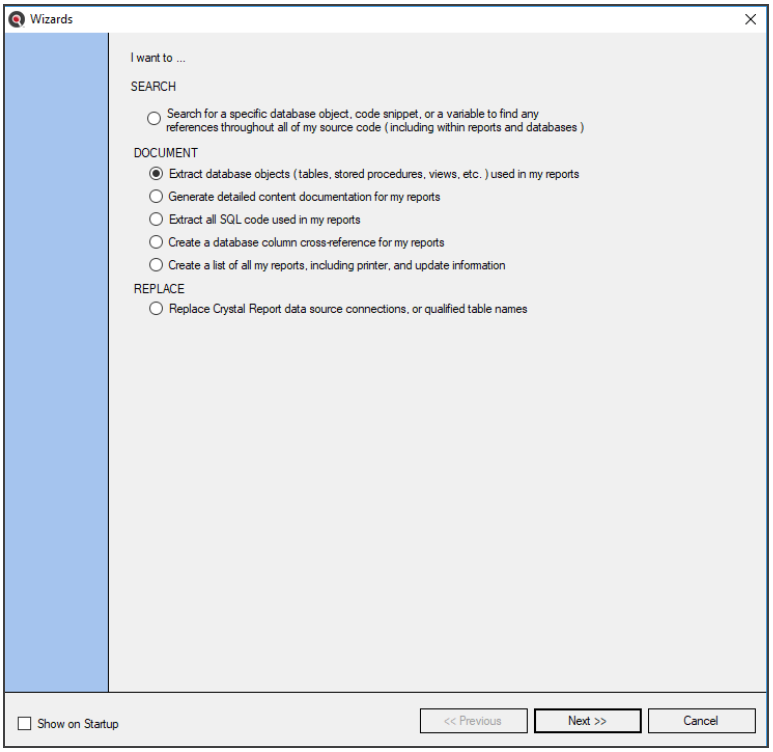
- "Databases" on page 88
- "Apply Database Item Filters" on page 93
- "Test Database Connection" on page 90

Reporting Tools

Examples in this section include creating a SQL statements detail extract and creating a database cross-reference list.

Create a Database Cross-Reference List

1. Launch the Export Wizard for a Database Cross-Reference Extract:
   a. Using the main Wizard:
      i. At the top, left of the main window, in the search bar, click on the **Wizards** button. The **Wizards** dialog will appear.

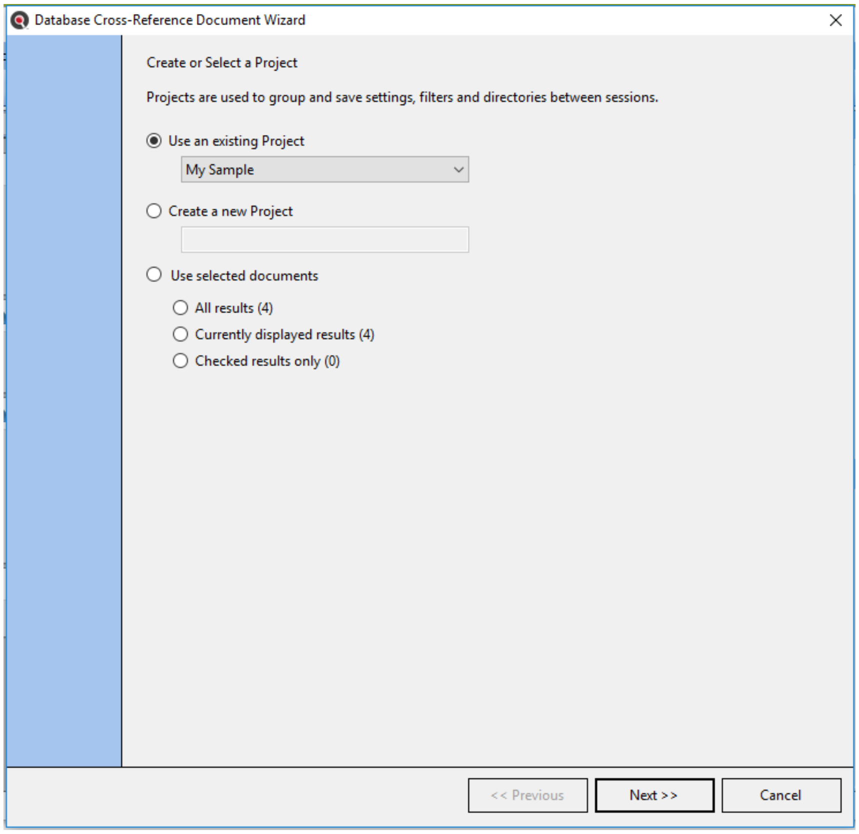


ii. Click to choose the **`Extract database objects (tables, stored procedures, views, etc.) used in my reports`** option.

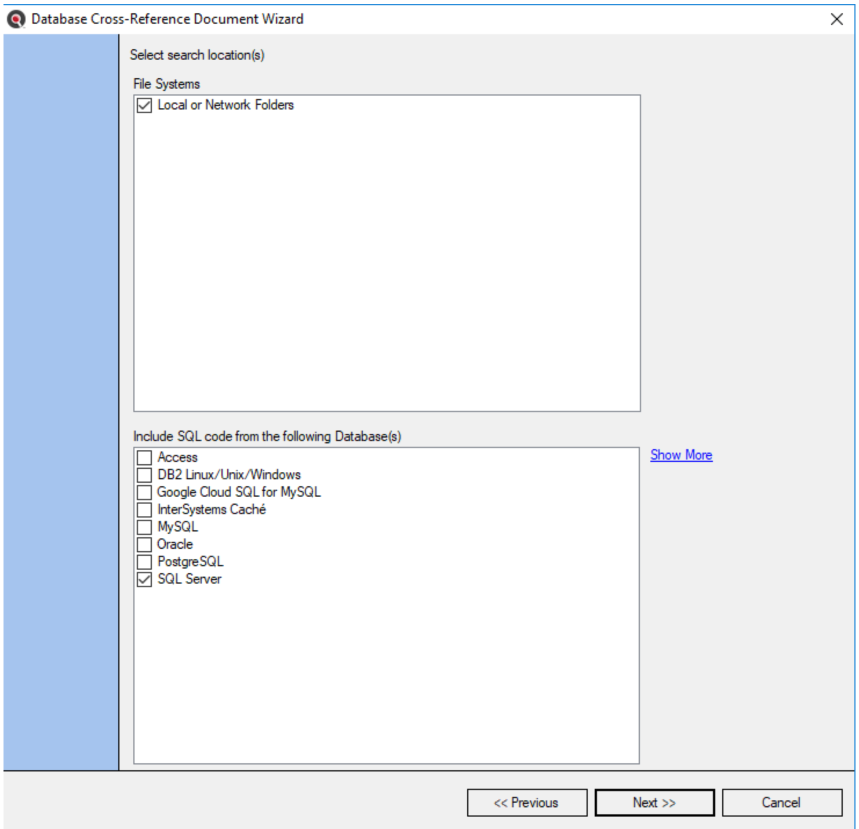
b. Using the menu:

i. From the Find it EZ menu, select ***Document -> Business Intelligence -> Database Cross-Reference***.

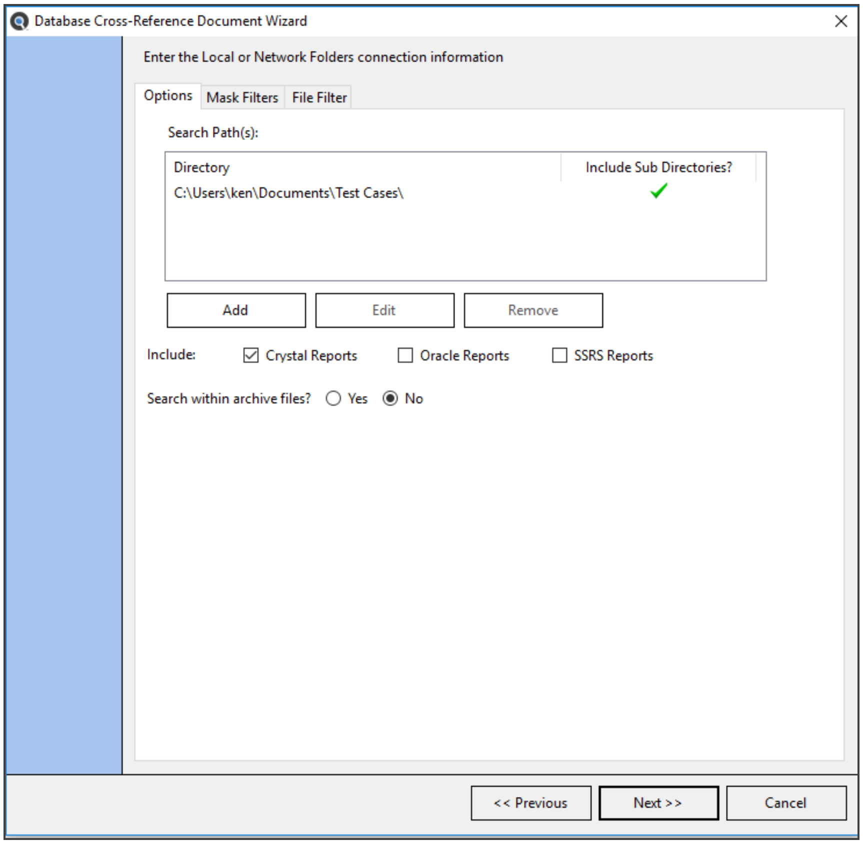
The **Database Cross-Reference Document Wizard** will appear. See below:

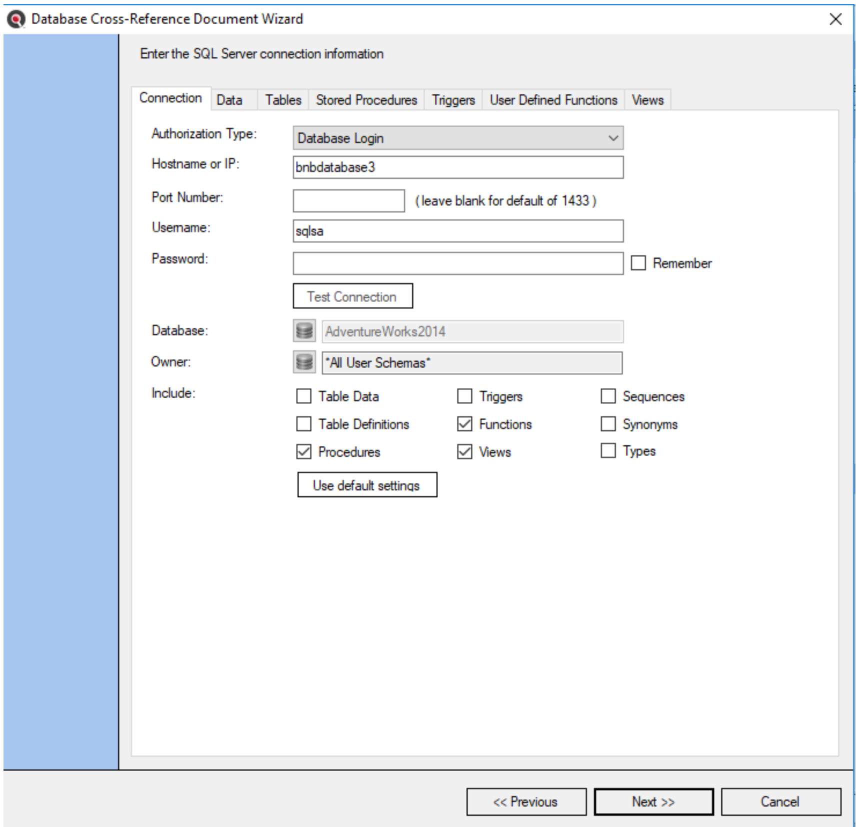


2. Click on the **Next >>** button to continue.



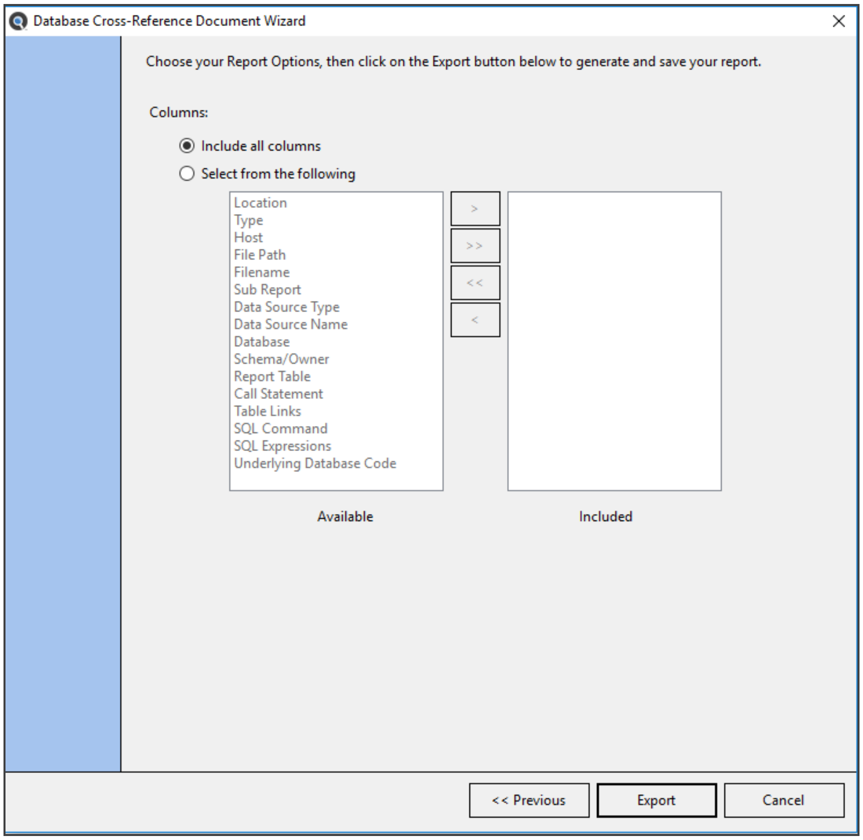
3. Click to select the report file locations and optionally select the underlying source databases if you would like to include the SQL Select code from procedures, views or functions used by your reports.
4. Click on the **Next >>** button to continue. Each of the selected source report location and underlying database configuration panels will appear as in the examples below.


Database Cross-Reference Document Wizard
Enter the Local or Network Folders connection information
Options
Mask Filters
File Filter
Search Path(s):
Directory
Include Sub Directories?
C:\Users\ken\Documents\Test Cases\
Add
Edit
Remove
Include:
Crystal Reports
Oracle Reports
SSRS Reports
Search within archive files?
Yes
No
<< Previous
Next >>
Cancel

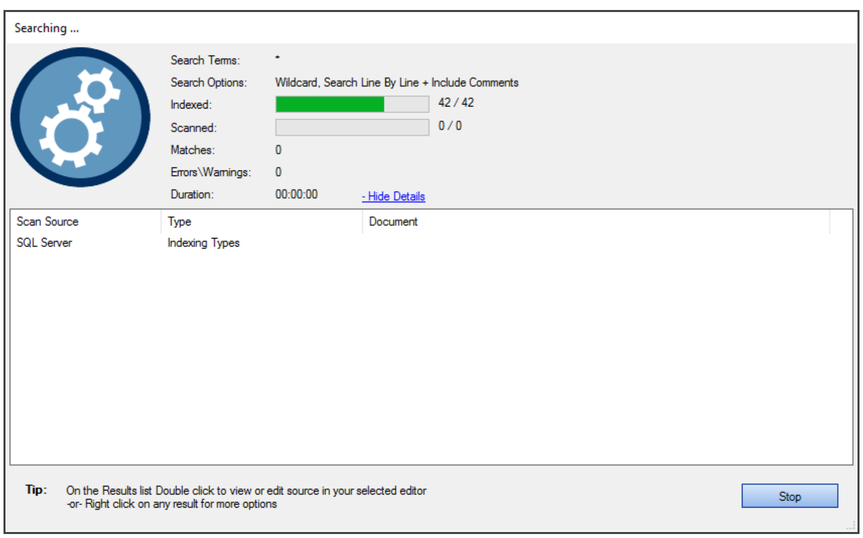


5. Enter or confirm the pre-configured the file location and underlying database(s) connection information, click the check-boxes to `include` desired report types and known database objects used by your reports.

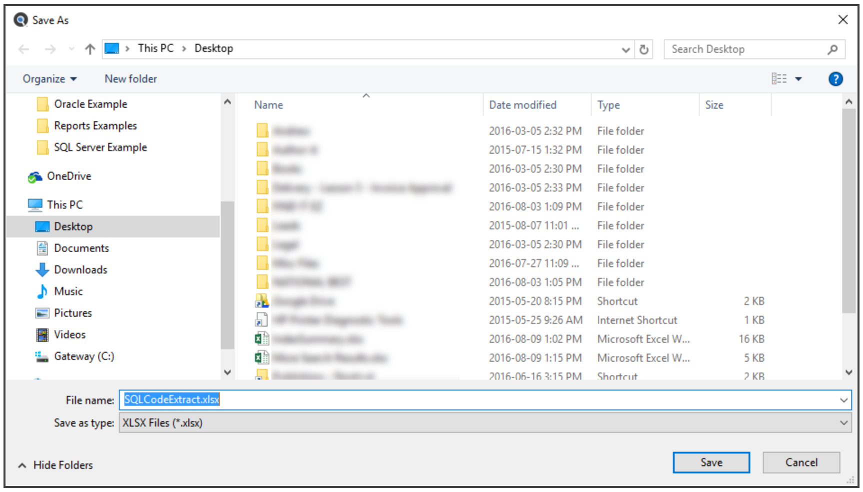
6. Click on the **Next >>** button to continue after each configuration panel is completed. Use the **Test Connection** button to confirm valid settings where applicable. After the last location is configured, the **Export Confirmation** dialog will appear.



7. Choose what columns you would like to export. The default is to `include all columns` available.
8. Click on the **Export** button. Find it EZ will begin gathering the required data.

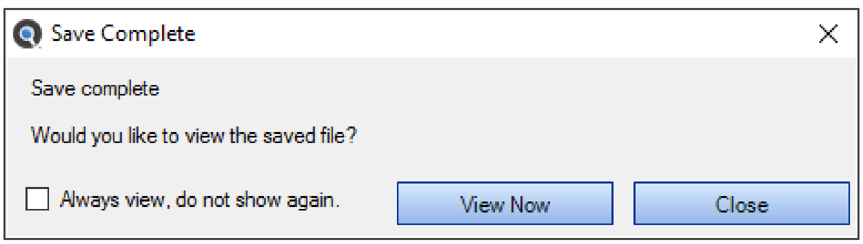


9. Once complete, a **Save As** dialog will appear. See example below:

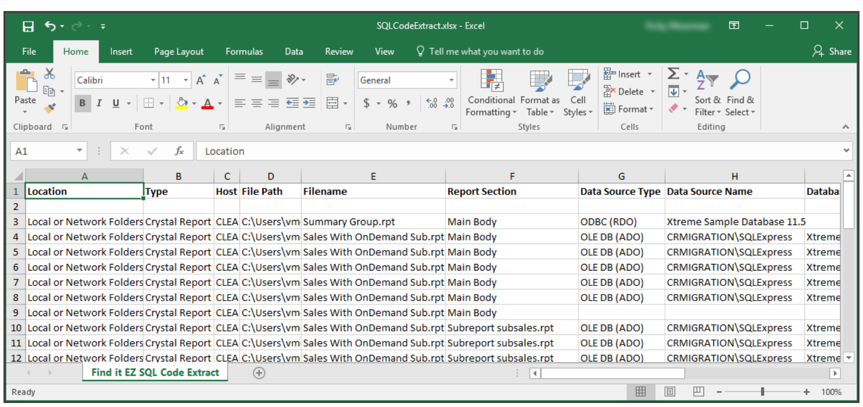


10. Save the report:
    a. Modify the **File name** as desired.
    b. Navigate to the desired folder location.
    c. Click on the **Save** button.

A **Save Complete** notification will appear, as below:



11. To view the saved report, click on the **View Now** button. The file will open in the specified viewer / editor. See example below:

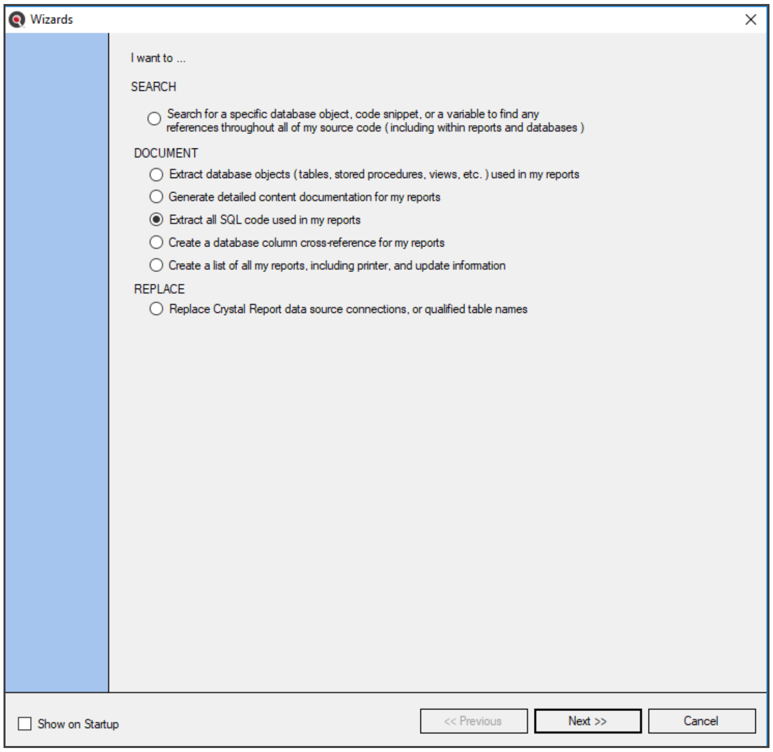


Report data will include the following:

- 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 - SQL SELECT statement content based on procedures, views or functions referenced when source database configuration included

Extract all embedded SQL queries from within my reports

1. Launch the Export Wizard for an embedded report SQL Queries extract:
   a. Using the main Wizard:
      i. At the top, left of the main window, in the search bar, click on the **Wizards** button. The **Wizards** dialog will appear.

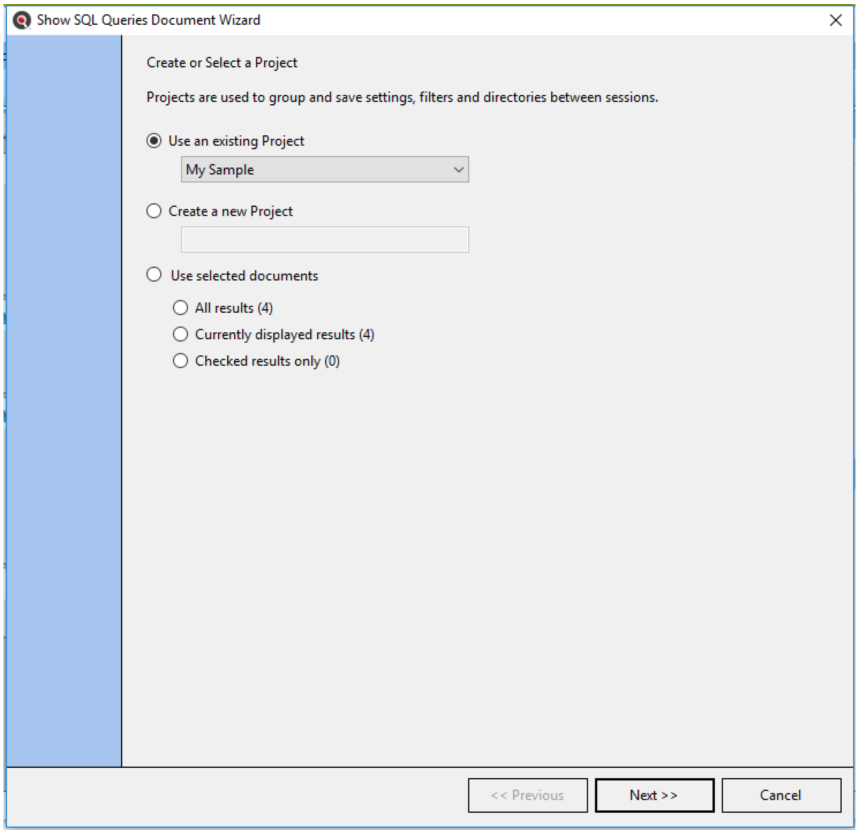


ii. Click to choose the **Extract all SQL code used in my reports** option.

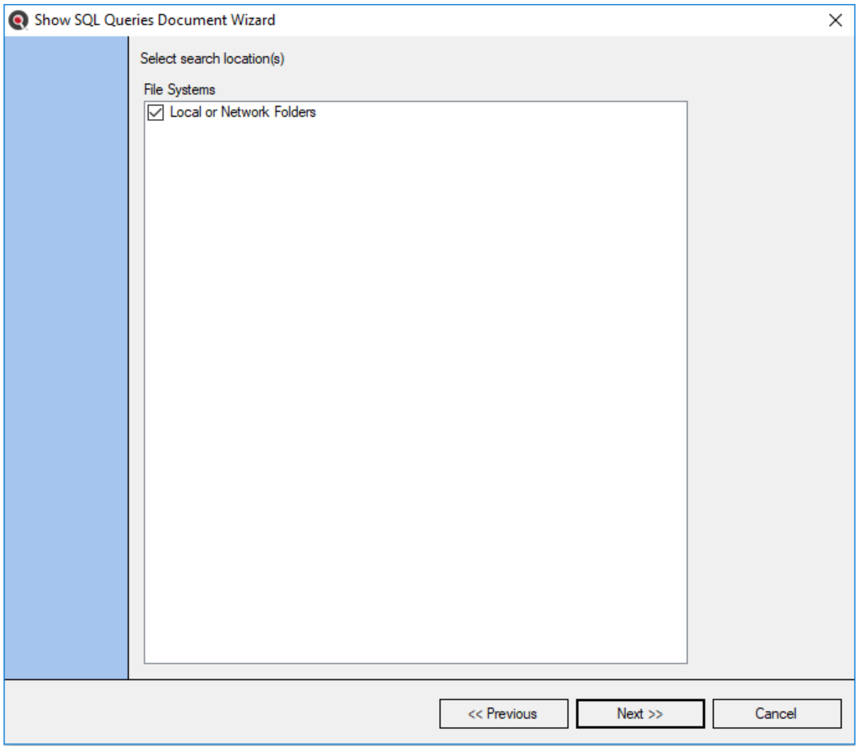
b. Using the menu:

i. From the Find it EZ menu, select ***Document -> Business Intelligence -> Show SQL Queries***.

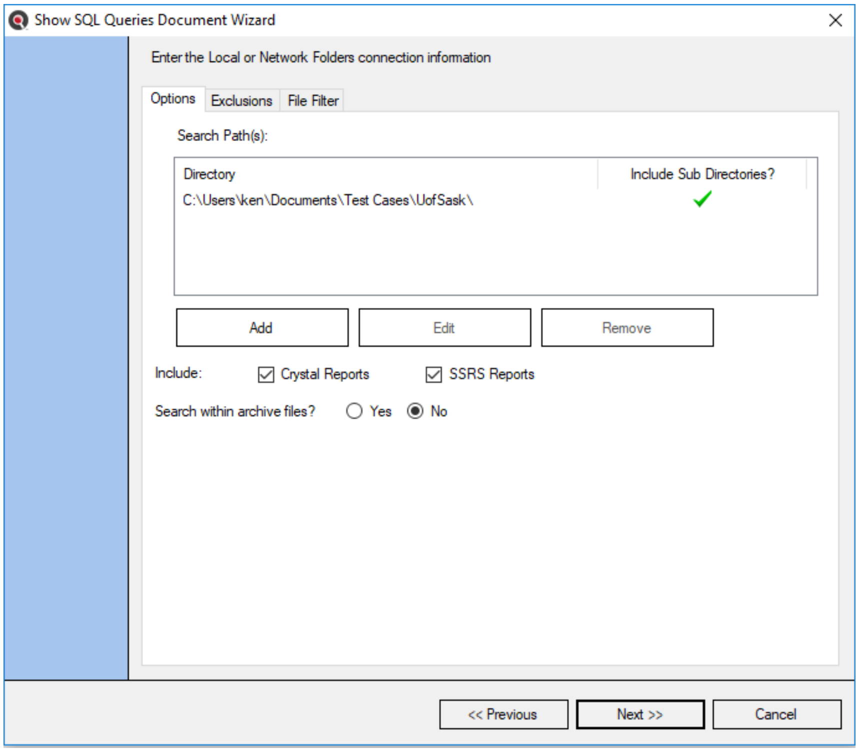
The **Show SQL Queries Document Wizard** dialog will appear.



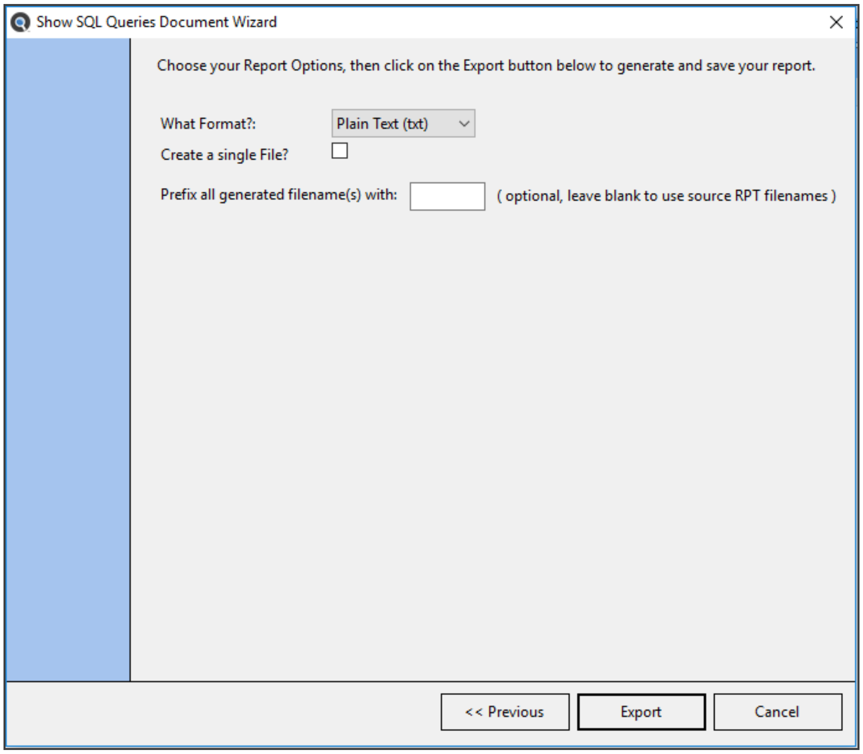
2. Click on the **Next >>** button to continue.



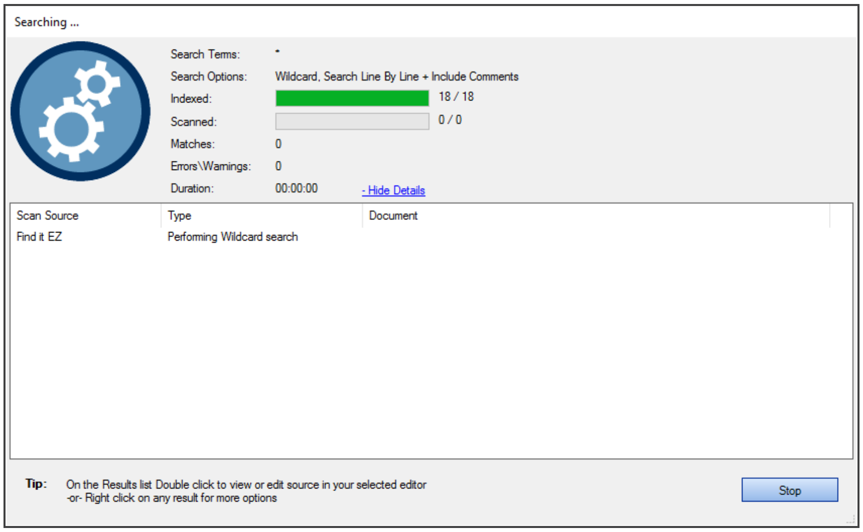
3. Click to select all of the report file locations to include.
4. Click on the **Next >>** button to continue. Each of the selected source report location configuration panels will appear as in the examples below.



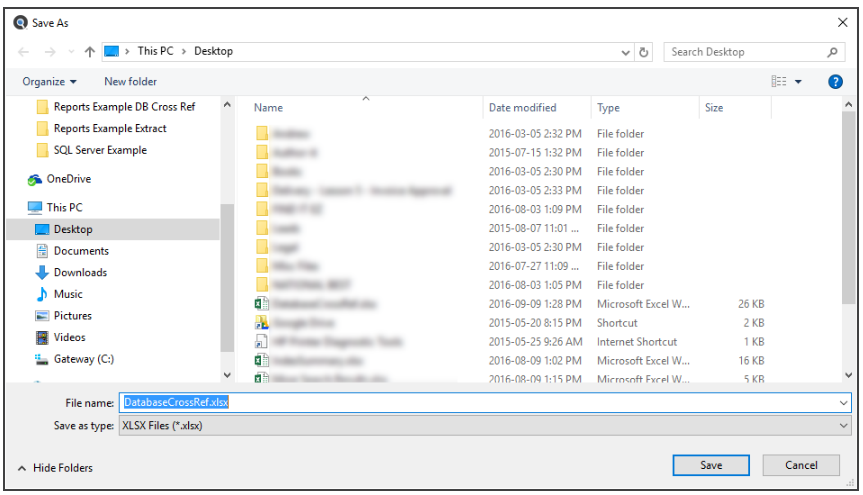
5. Enter or confirm the pre-configured the file location and other connection information, click the check-boxes to `include` the desired report types to extract embedded SQL queries from.
6. Click on the **Next >>** button to continue after each configuration panel is completed. Use the **Test Connection** button to confirm valid settings where applicable. After the last location is configured, the **Export Confirmation** dialog will appear.



7. Enter the export options:
    a. Select exported content file type.
    b. All data exported to a single file, or individual files created for each report?
    c. Optionally add a prefix to the file(s) created. Can be useful for separating data from each wizard run stored in the same destination output folder.
8. Click on the **Export** button. Find it EZ will begin gathering the required data.



9. Once complete, a **Save As** dialog will appear when the "single file" option was checked in step 7(b). See example below:



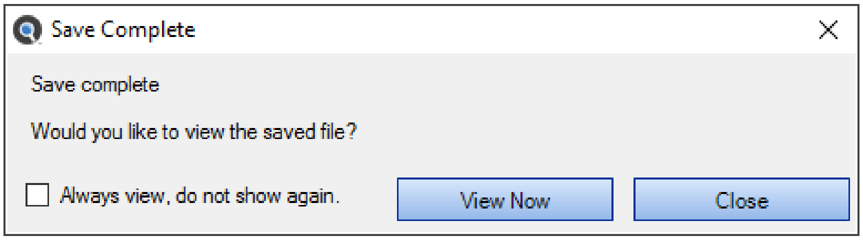
10. Save the report:

    a. Modify the **File name** as desired.

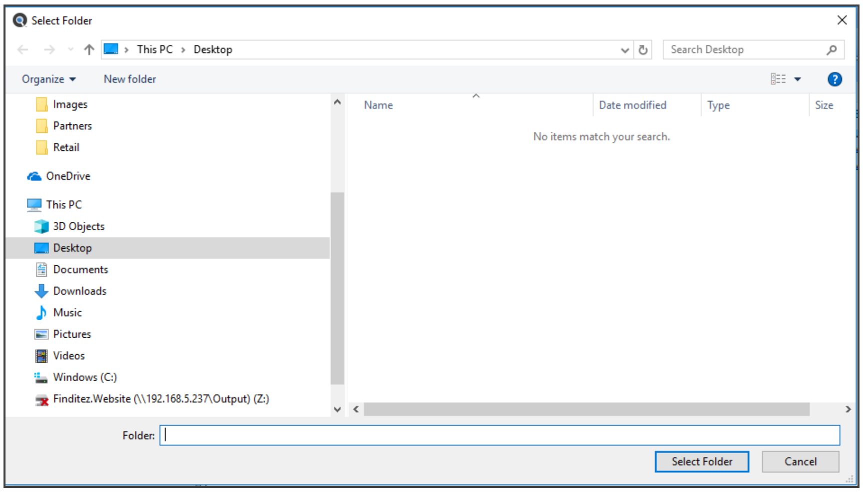
    b. Navigate to the desired folder location.

    c. Click on the **Save** button.

A **Save Complete** notification will appear, as below:



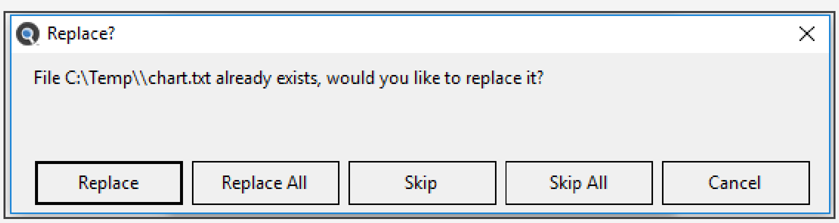
11. Or once complete, if individual files are to be created, a **Select Folder** dialog will appear as below:



12. Save the report:
    a. Navigate to the desired folder location.
    b. Click on the **Select Folder** button.

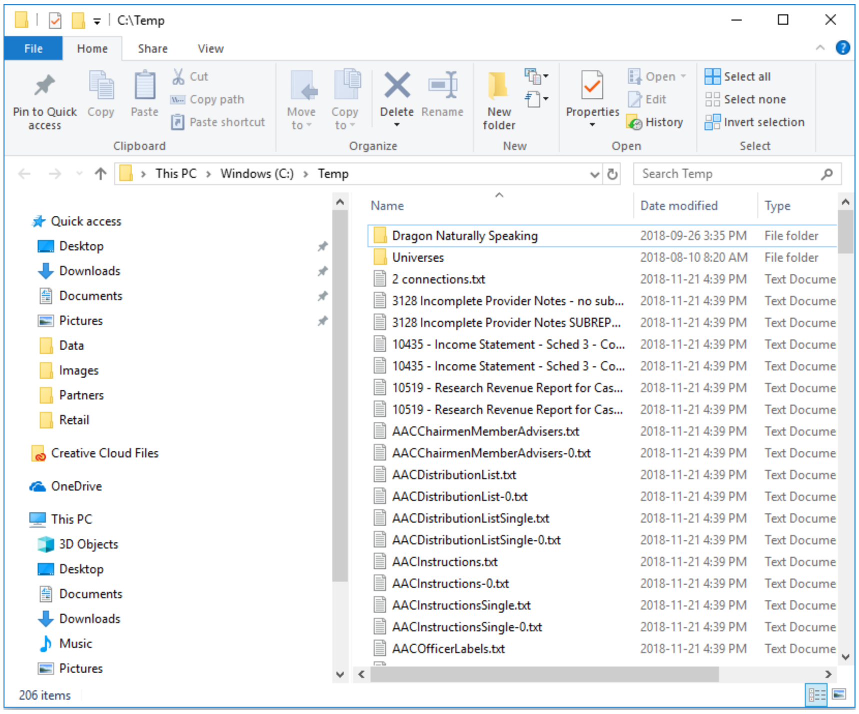
The file creation process will begin.

Note: Each generated file will use the same filename as the source document, along with the target selected file type extension. Sub-folders will be created based on the source file location. A **Replace File** confirmation alert dialog may appear if a duplicate filename in the target output path already exists, as below:



Chose the desired action to continue processing.

13. Upon completion, the target output folder will appear, displaying all generated files as below:



See Also:

- "Create or Select a Project" on page 116
- "Search Wizard" on page 115
- "Select File Location(s)" on page 117
- "Add or Edit Search Path(s)" on page 77
- "Local or Network Folders" on page 75
- "Include Archive Files" on page 80
- "Connection Information - Databases" on page 90
- "Choose Report Options and Export Report" on page 125

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 77

> **Note:** You can exclude sub-folders and / search specific individual or multiple paths.

- "Include Archive Files" on page 80

> **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 81
- "Local or Network Folders" on page 75

Databases:

- "Connection Information - Databases" on page 90

> **Note:** You can search a subset of database objects.

- "Apply Database Item Filters" on page 93

> **Note:** You can include a filtered set of database items, selected by name (tables, views, stored procedures, triggers, etc.).

- "Reset Search Defaults" on page 91

Reporting Utilities:

- "BI Reports" on page 98

> **Note:** You can include specific report “(page) sections,” “(search in) areas,” and “search (elements)” unique to each report type.

- You can **Use default 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 107

Programs:

- "Add or Remove File Extensions Searched" on page 103

> **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 160
- "Set User Options" on page 50; 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 135; note the settings available in the **Options** section - **Content Filters** category.
- "Use the Expression Builder" on page 140; for assistance building complex Boolean queries.

Identify reports using a specified connection

Problem:

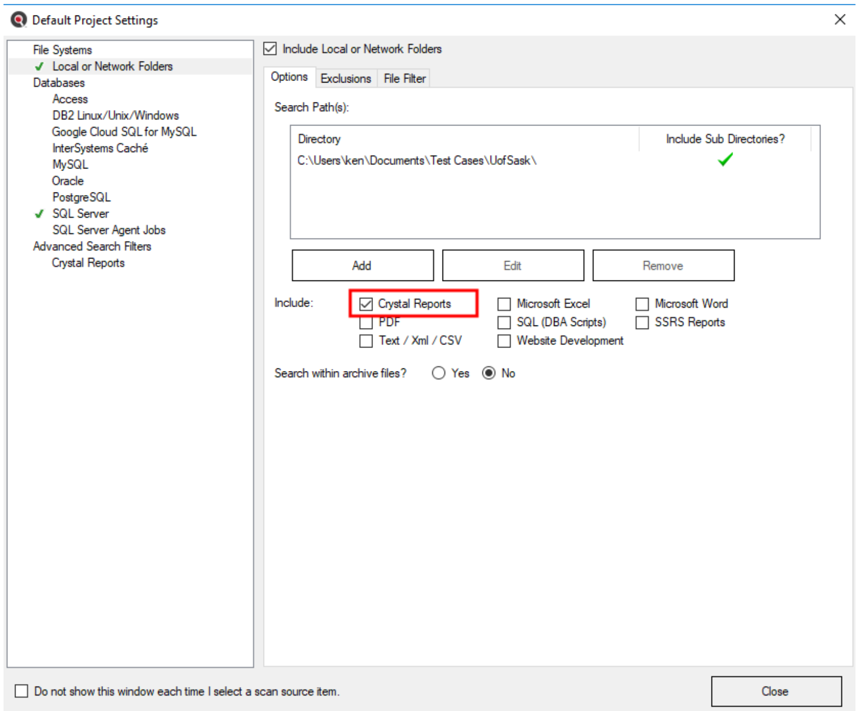
You need to determine if there are Crystal Reports using a specific ODBC connection to an underlying data source.

Solution:

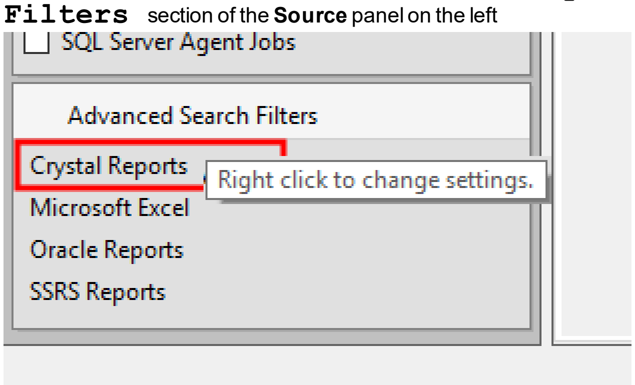
There are a couple of ways you can do this using Find it EZ.

Ensure that searching connection information is enabled in the Crystal Report settings:

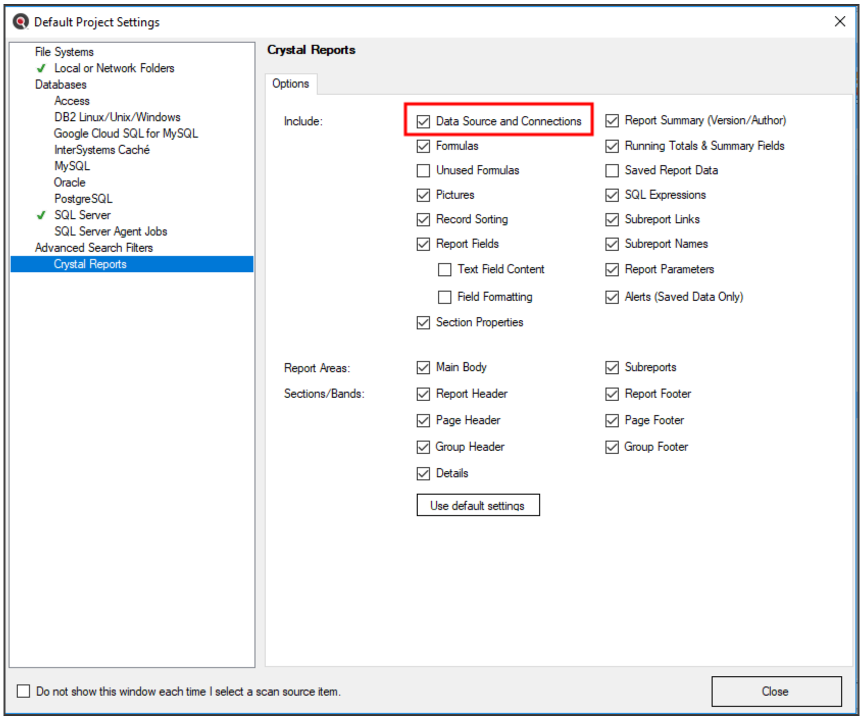
- In the **Source** Panel in the `File Systems`, click to `Include:` **Crystal Reports** source, as below:



- Open the Crystal Reports project settings: right-click on `Crystal Reports` in the `Advanced Search Filters` section of the **Source** panel on the left



- OR - 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 135
- "Reporting Tools" on page 204

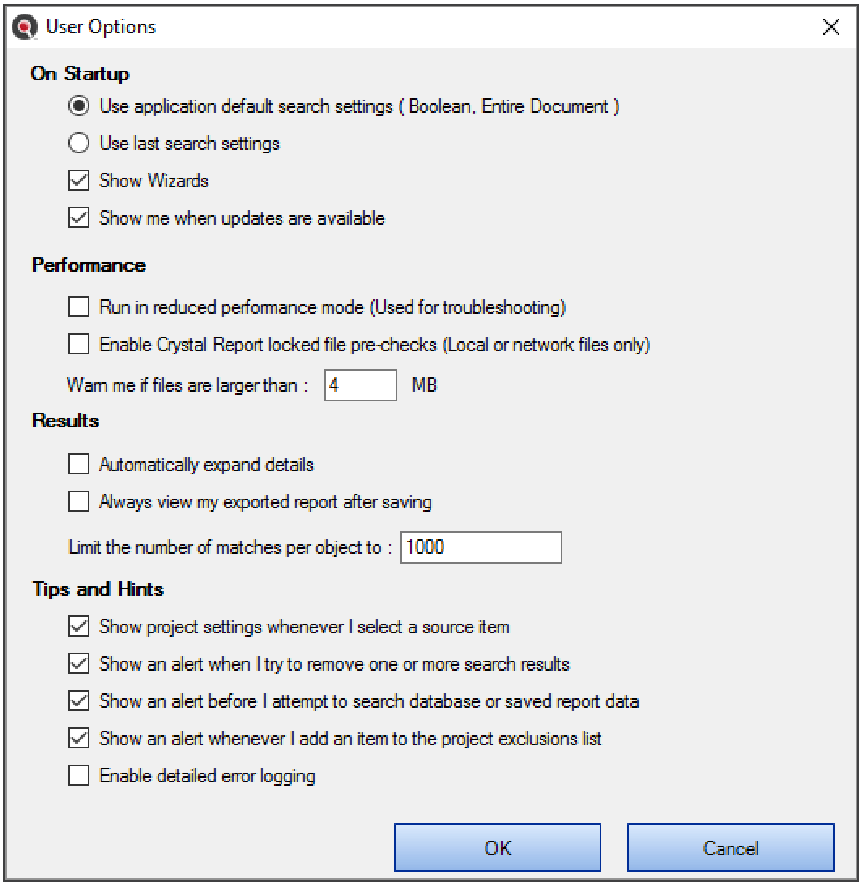
Program freezes when attempting to index Crystal Reports on a local or network file system

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:

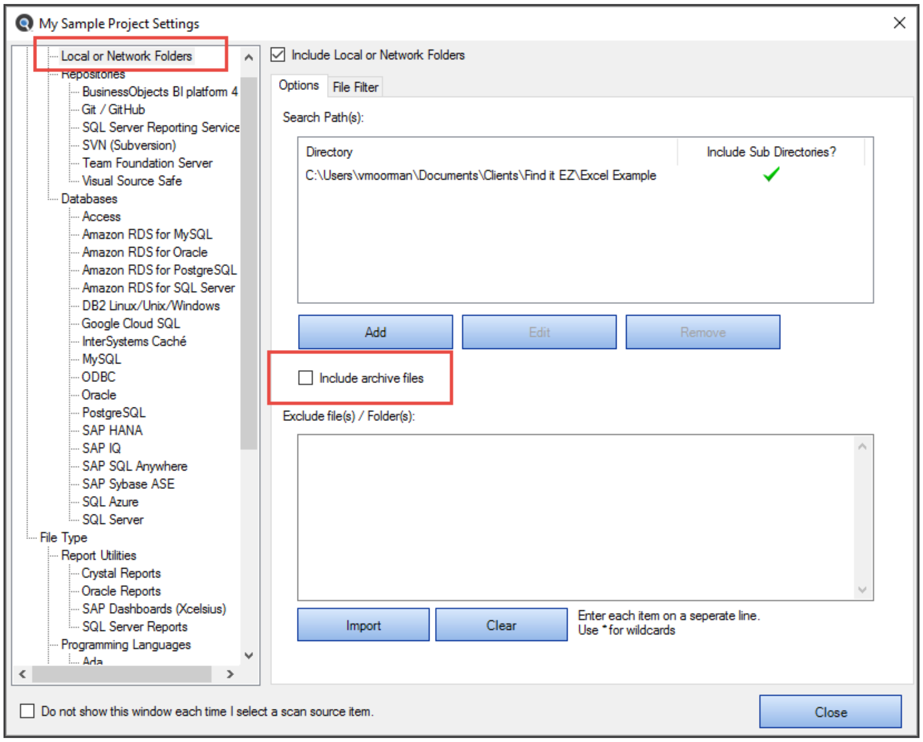
While indexing a project, you receive a Windows 10 message, which reads: Use of "7-Zip" has been denied by your Administrator...

> 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:

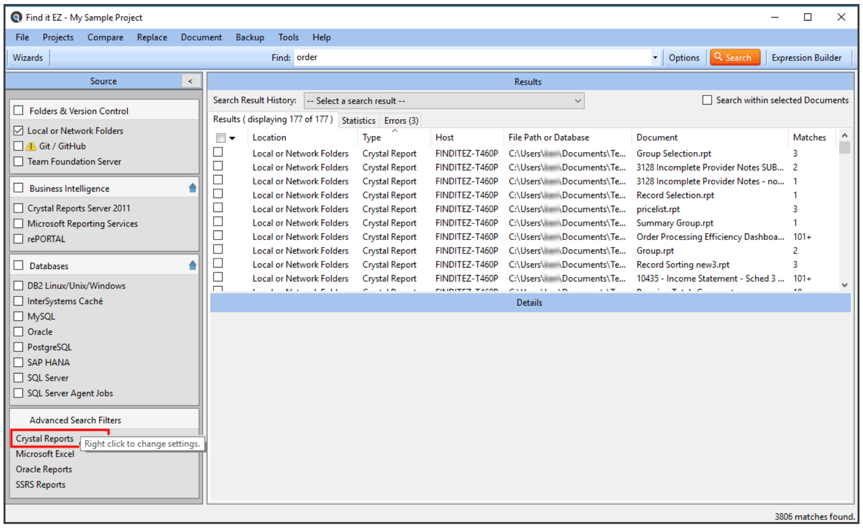
If a system administrator enforces a rule disallowing use of the 7-zip program, then either this restriction has to be removed by the sys admin OR the end-user unfortunately cannot search the above particular document types with Find it EZ.

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.

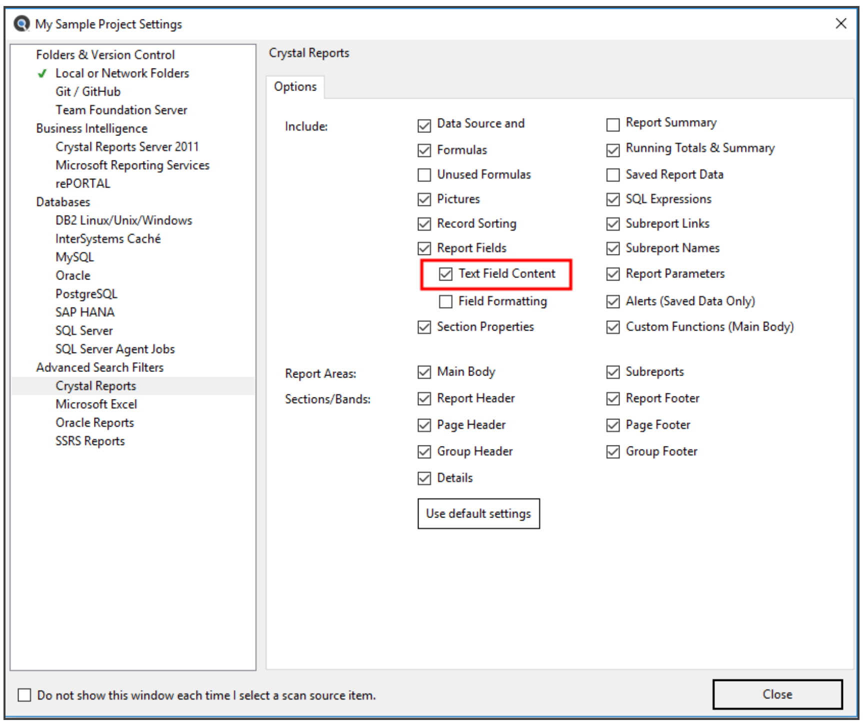
Find text in a text box in a Crystal Report

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`" under the `Advanced Search Filters` section. This will bring up the **Project Settings** configuration dialog 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 Crystal Reports document search is done it will include content within text boxes.

Find it EZ Support

This section describes the many support options available with Find it EZ, how to report a bug, or a request a feature to Find it EZ Software Corp.., and how 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, managing serial numbers, quotes, orders, and creating or reviewing support tickets status.

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.

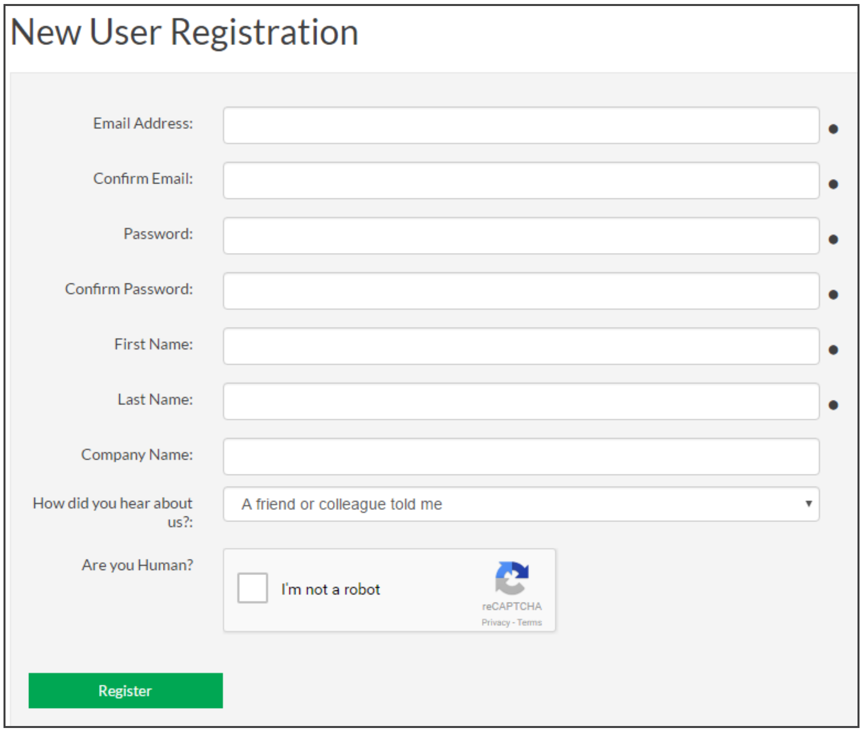
Register for a free Find it EZ member account:

> **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.



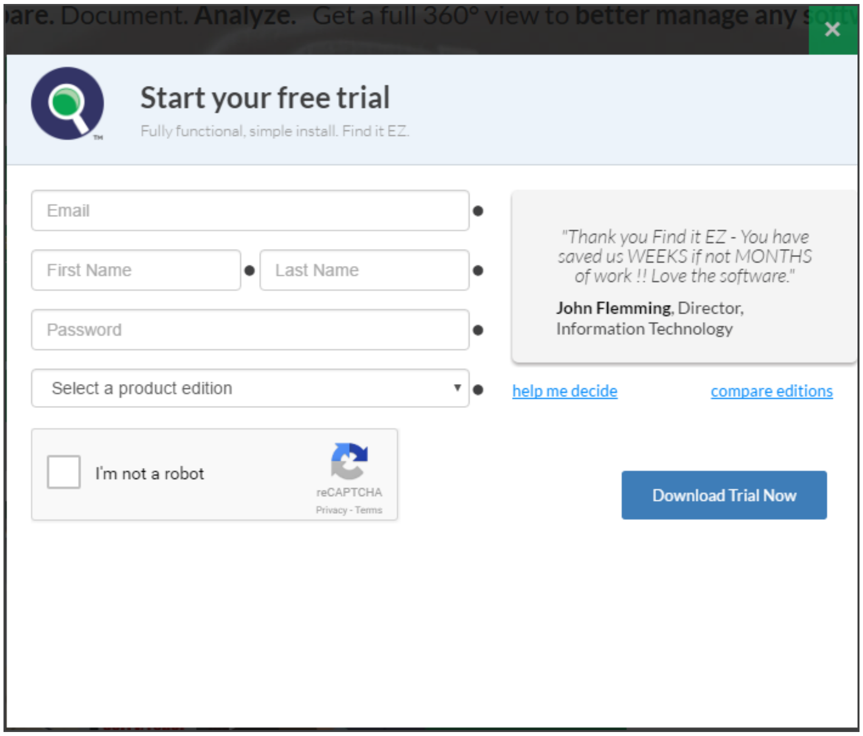
Note: Items with dots are required. The **Are you Human?** option must also be checked.

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.

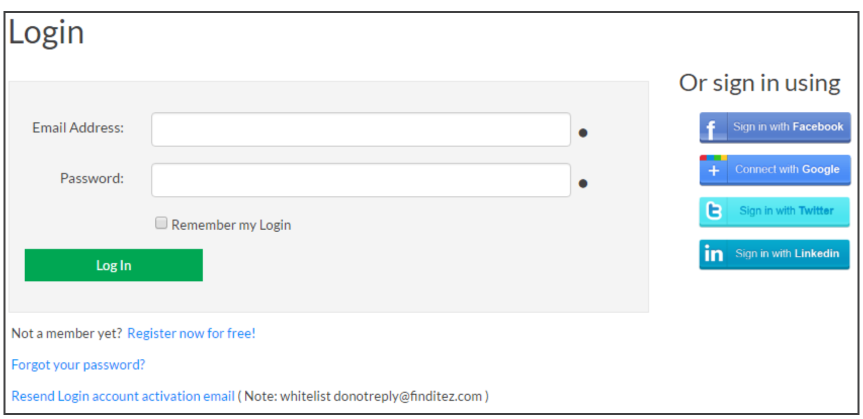


4. Click on the **Download Trial Now** button. A separate welcome and trial key emails will be sent to the provided email address.

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 corporate 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:

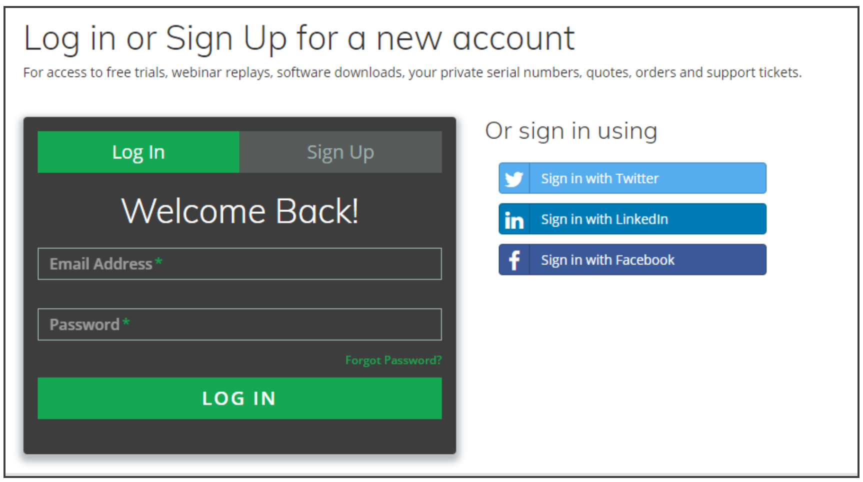
To log in to your Find it EZ member e-mail account, follow these steps:

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:

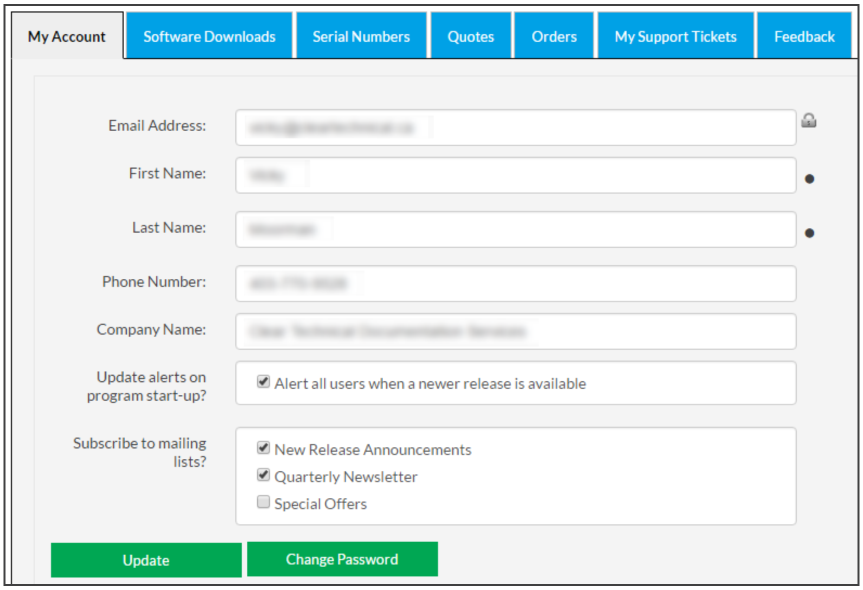
1. Visit **https://www.finditez.com/login**.
2. Click on any one of the available social account sign-in buttons. See below:



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

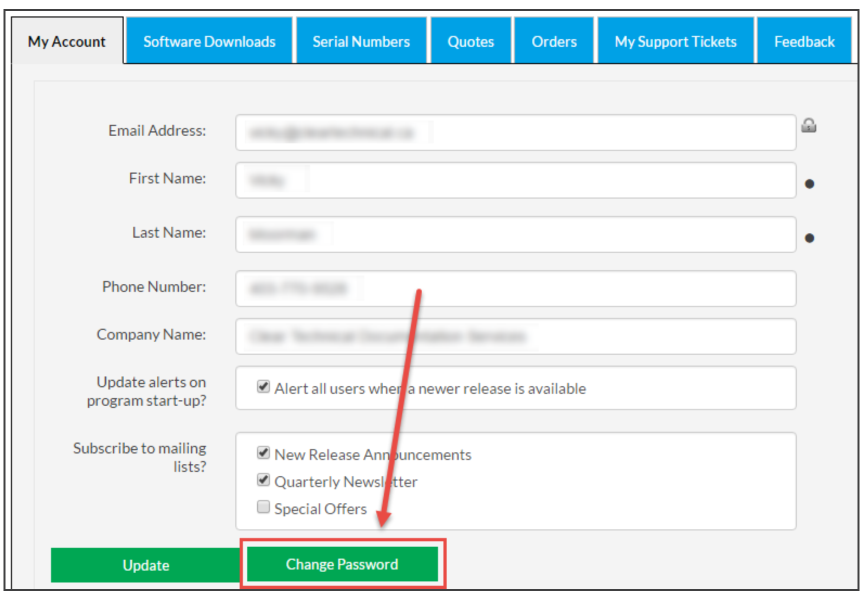
1. Log in to your Find it EZ Member Account.
2. On the **My Account** tab, make changes as desired.



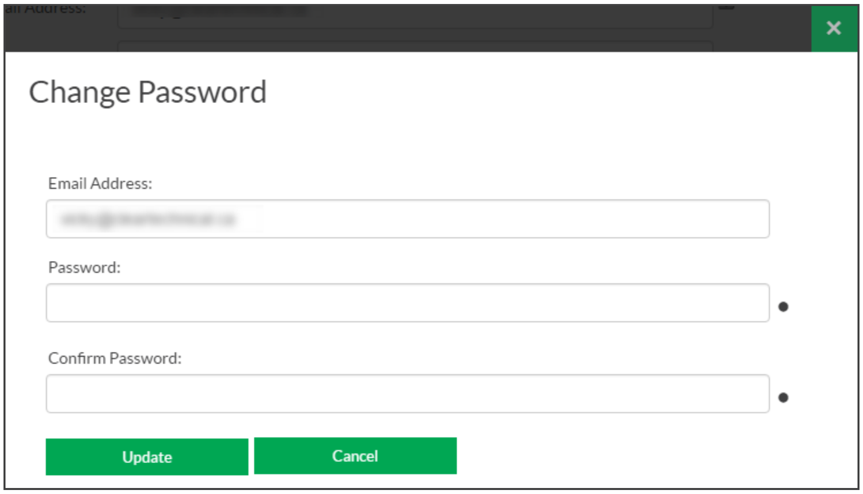
3. Click on the **Update** button to save.

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.

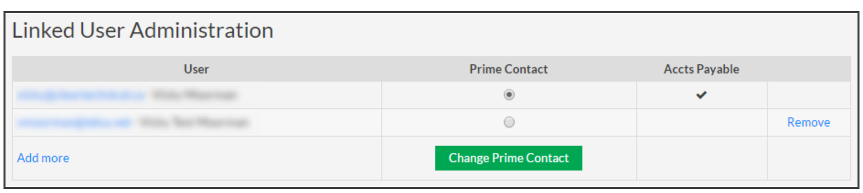
Manage Linked User Accounts

Add New Account Contacts

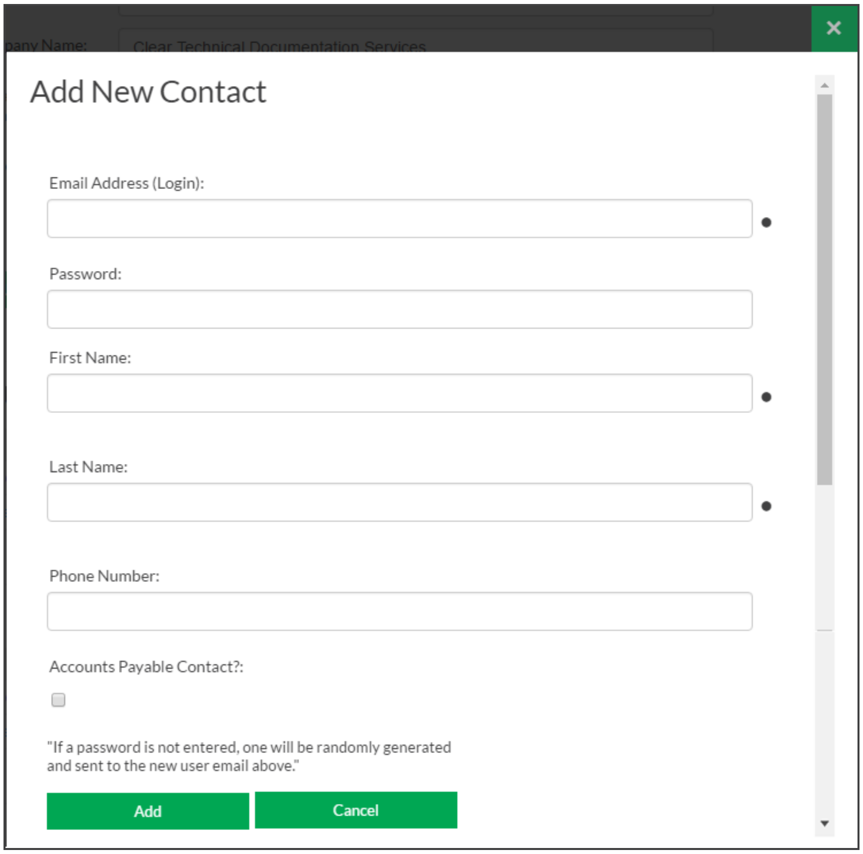
To add additional end-users associated with your company, so that they may have direct access to download software updates, self-serve license key management and support, simply follow the steps below:

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.

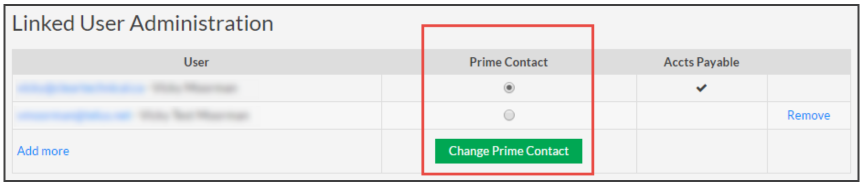
Alert: We highly recommend that the new contact logs in and changes his / her temporary password as soon as possible.

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.

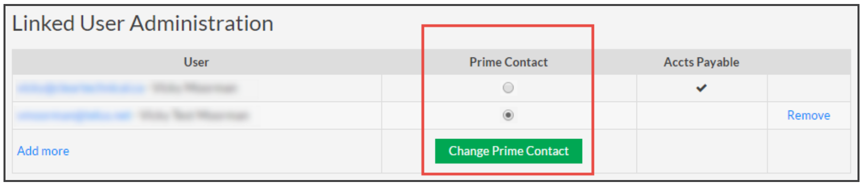
Change Prime Account Contact

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:

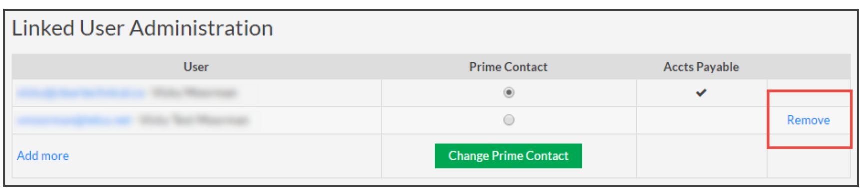


Remove an Account Contact

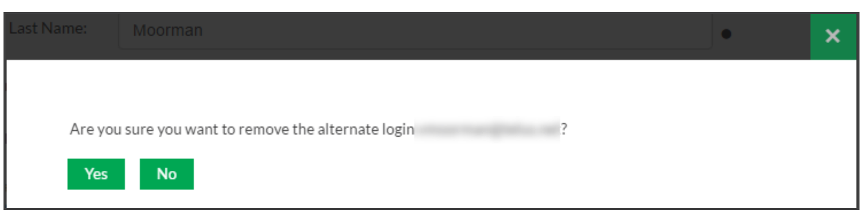
If a staff member is no longer with your organization or department, you can remove access to your Find it EZ company licenses and product order information (applicable to accounts payable contacts only) as follows:

Note: Only the primary company account contact can make these changes.

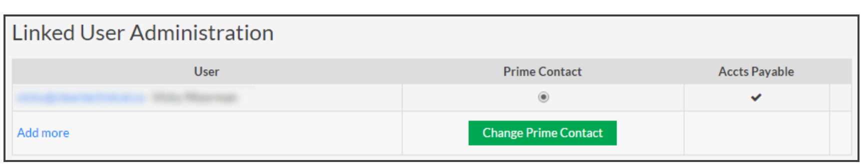
1. Log in to your Find it EZ Member Account.
2. On the **My Account** tab, scroll down to locate the **Linked User Administration** section.



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.



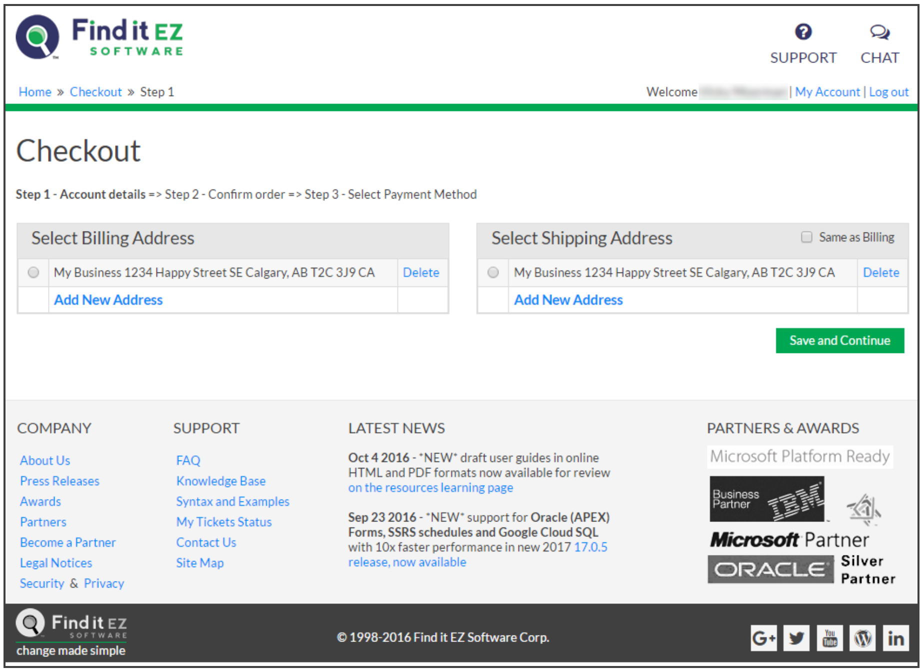
5. To remove the selected contact, click on the **Yes** button. The contact will be removed from the list.



6. To cancel, click on the **No** button.

Manage Company Address Records

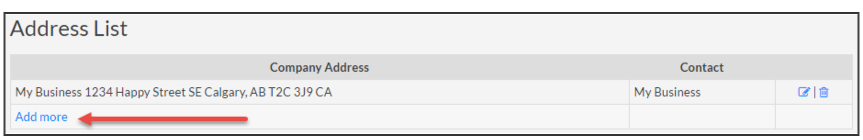
Your company address records are automatically added and/or updated during the order check-out process.



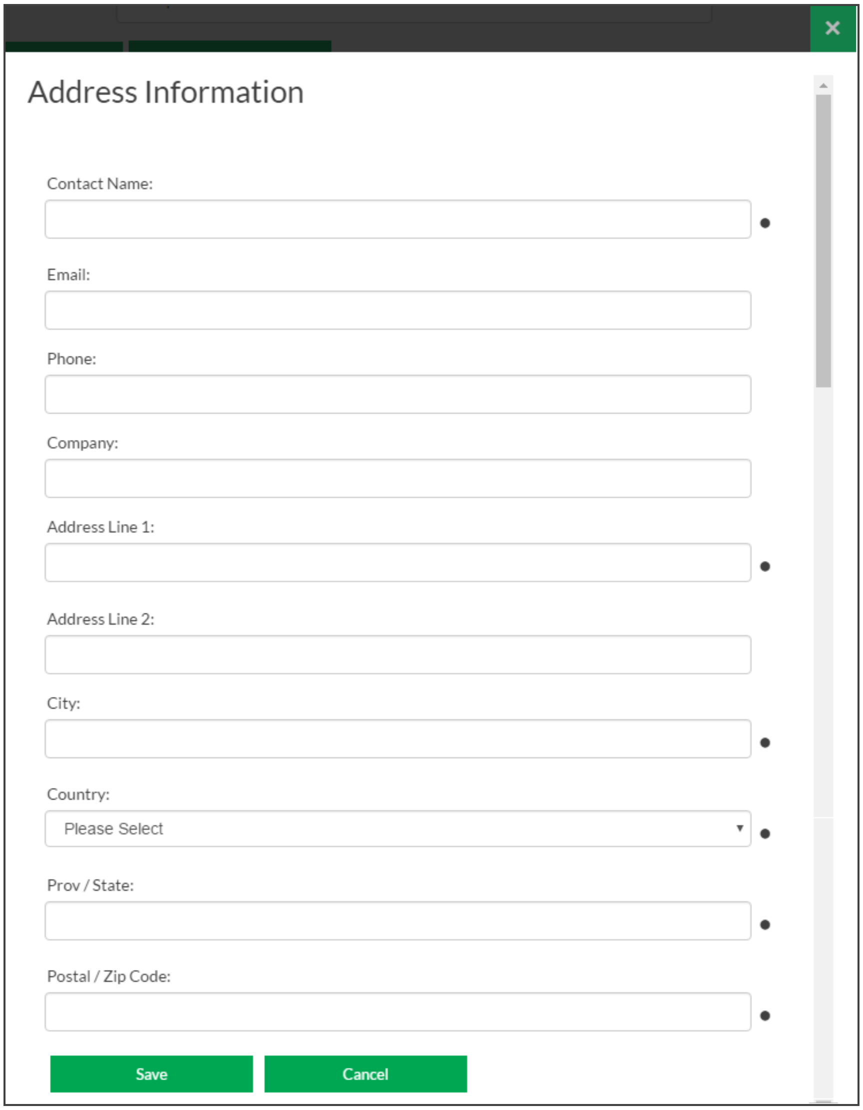
In addition to being able to select, add, or update address records using our secure cart check-out process, any active contact may also add, update, or remove address records that are linked to the company profile. These changes are immediately reflected and available for subsequent online orders placed.

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.



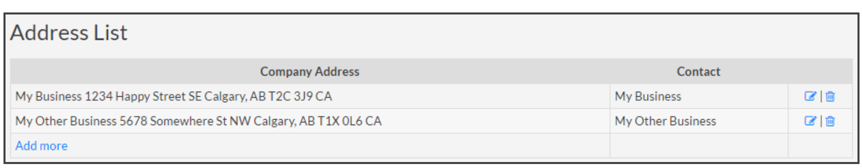
3. In the **Company Address** column, click on the **Add more** link. The **Address Information** dialog box will appear, as below:



4. Enter or select company location information.

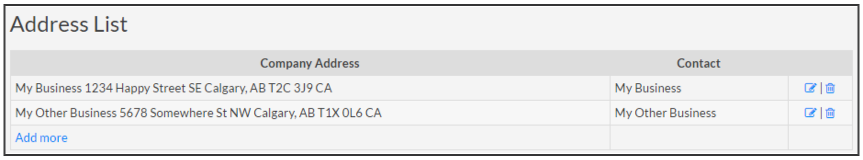
Note: Items with a dot are required.

5. Click on the **Save** button. The new address will be added to the list.

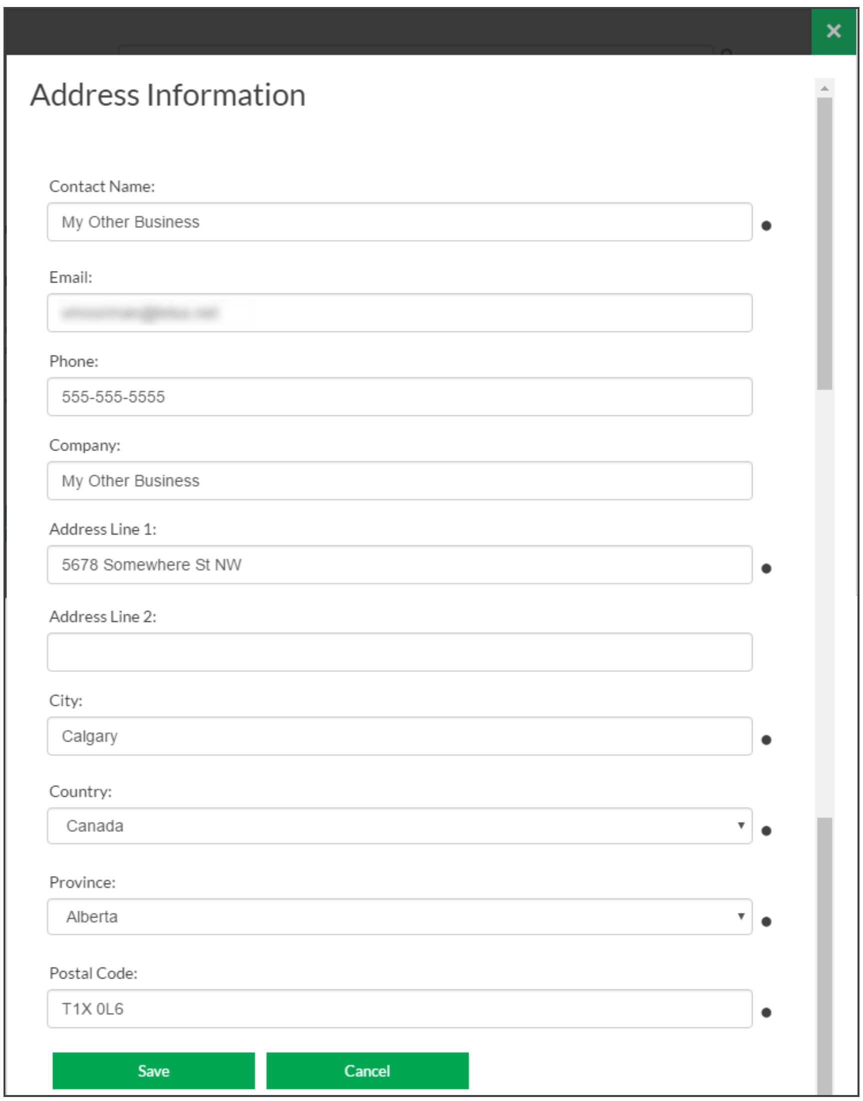


Update Company Address

1. Log in to your Find it EZ Member Account.
2. On the **My Account** tab, scroll down to locate the **Address List** section.



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.



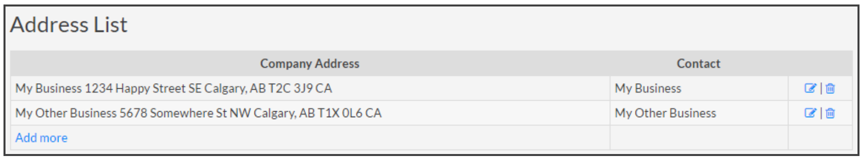
5. Change company location information as desired.

   Note: Items with a dot are required.

6. Click on the **Save** button.

Remove Company Address

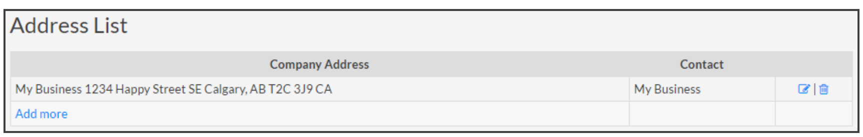
1. Log in to your Find it EZ Member Account.
2. On the **My Account** tab, scroll down to locate the **Address List** section.


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.

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.

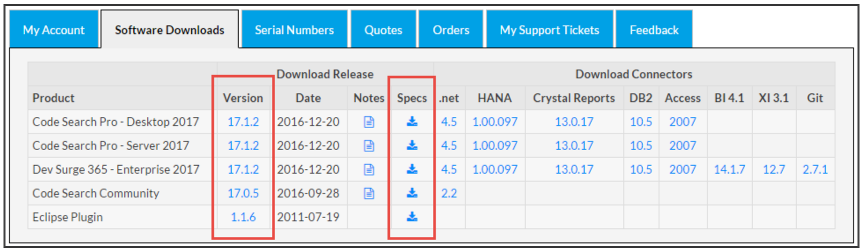
Download Release Version

From the Program:

1. See "From the Find it EZ menu, select Help -> Check for Updates ." on page 26

From 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.

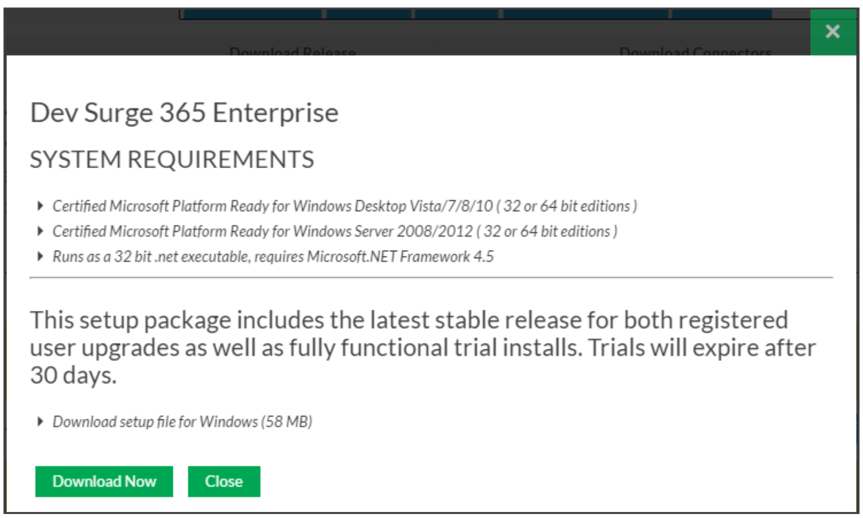


	Download Release				Download Connectors							
Product	Version	Date	Notes	Specs	.net	HANA	Crystal Reports	DB2	Access	BI 4.1	XI 3.1	Git
Code Search Pro - Desktop 2017	17.1.2	2016-12-20			4.5	1.00.097	13.0.17	10.5	2007			
Code Search Pro - Server 2017	17.1.2	2016-12-20			4.5	1.00.097	13.0.17	10.5	2007			
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										

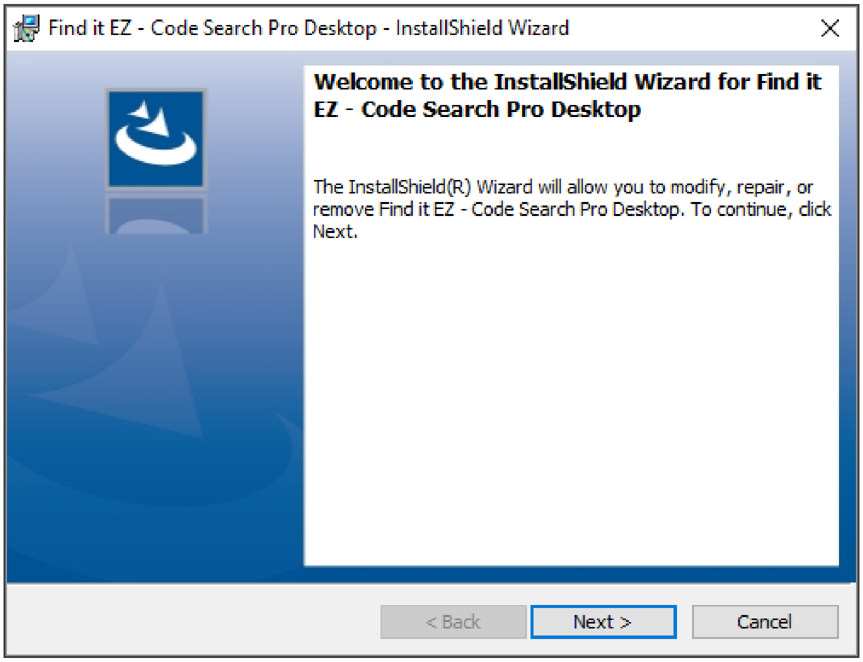
3. Locate the product and release version that you want to download.
4. Download the product as follows:
   a. In the **Version** column, click on the product release number for the corresponding product row. The release setup file will begin to download.

      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.

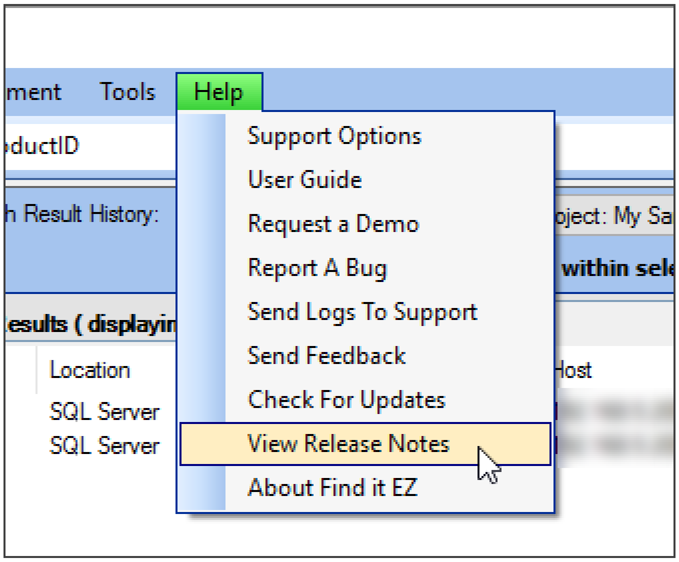
Note: The same product setup files are used for both trials as well as full release or upgrade installs.

See Also:

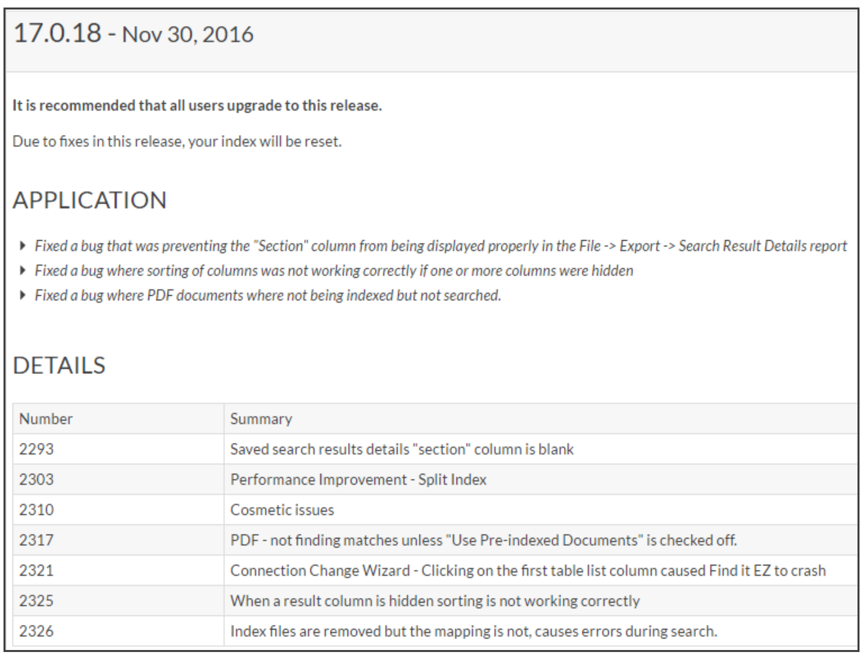
- "Download Connectors" on page 247
- "View Release Notes" below
- "View System Requirements" on page 245
- "Installation, Activation, and Updates" on page 3

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.



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.*

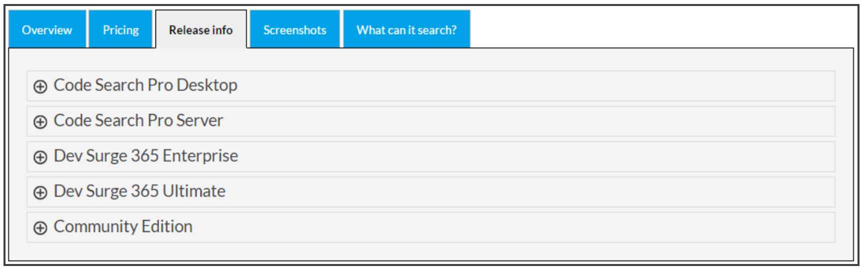
DETAILS

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.

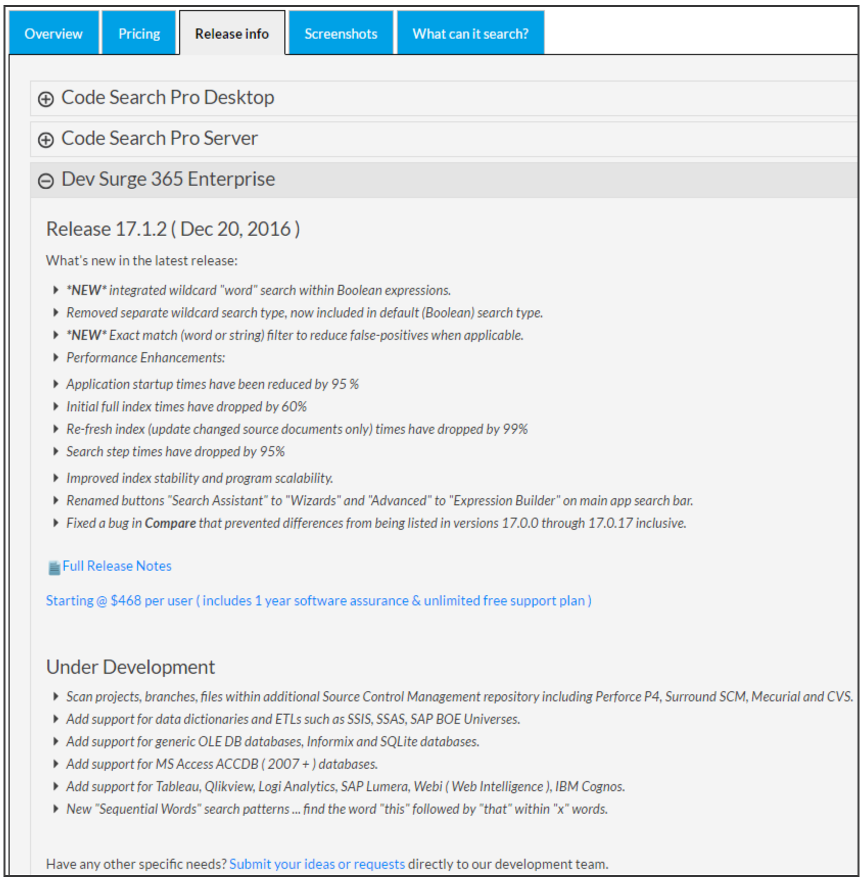
2. Scroll down to view historical notes.
3. To close **Release Notes**, close the browser tab or window.

On the Public Website:

1. Visit https://www.finditez.com/products/#release.



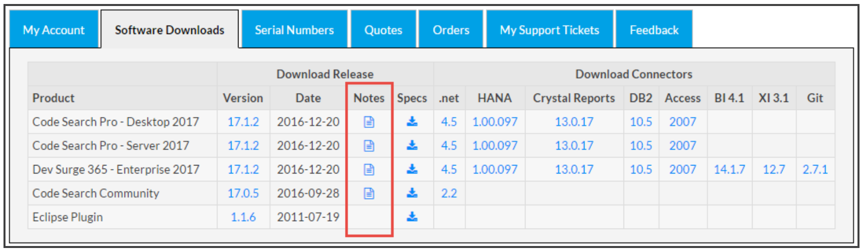
2. Click the + (expand) button to view details for the desired product edition.



3. View a summary of the latest release highlights, and click on the **Full Release Notes** link for more detail.

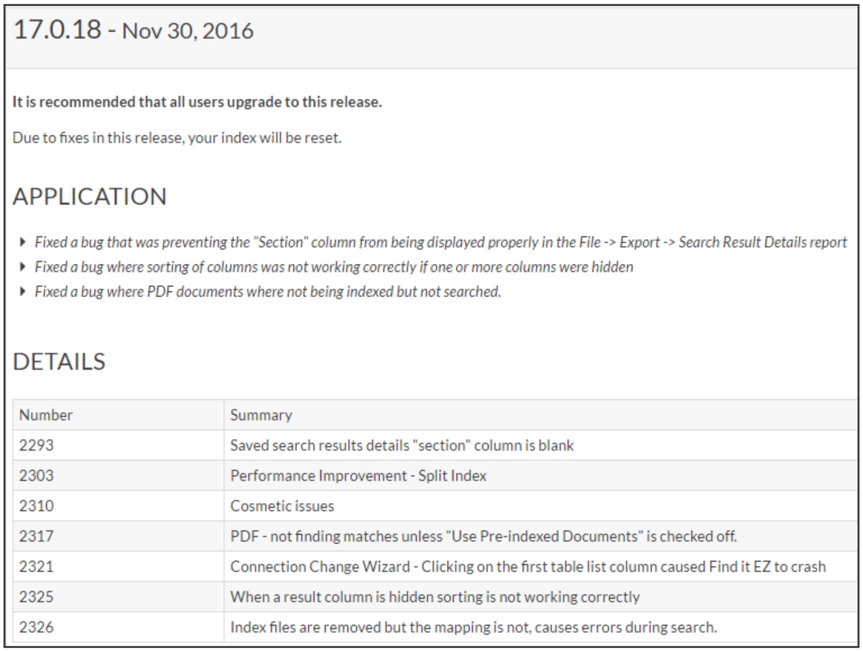
On the Member Website:

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.

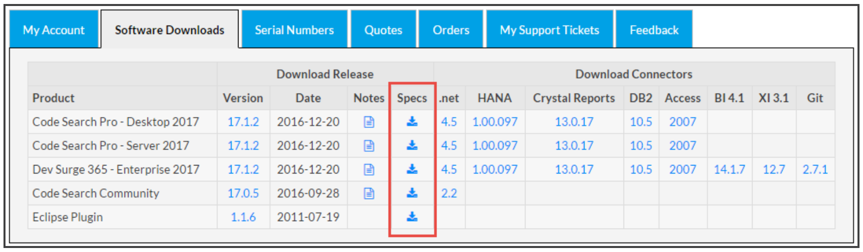
5. Scroll down to view historical notes.
6. To close the **Release Notes** dialog box, click on the **X** button.

View System Requirements

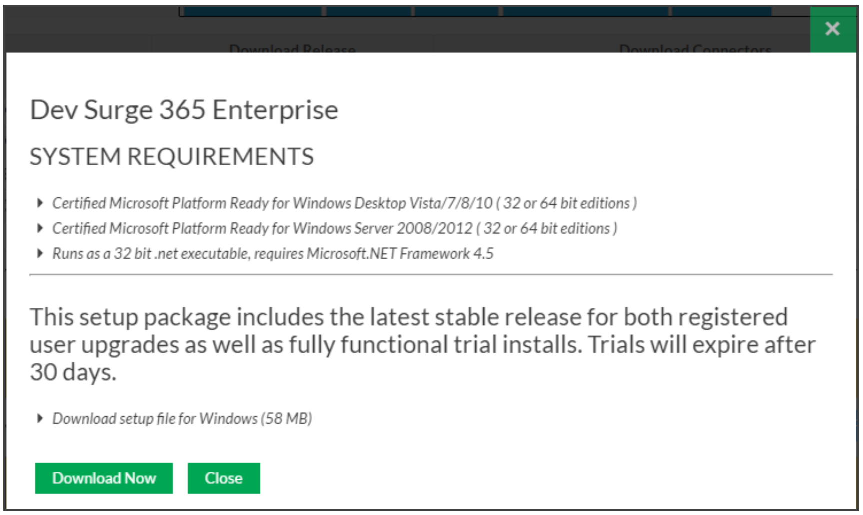
All editions of Find it EZ programs require a Microsoft Windows operating system that can run .net 4.5 or newer. For detailed technical specifications, see **https://msdn.microsoft.com/en-CA/library/8z6watww** . For individual edition requirements, see below.

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.



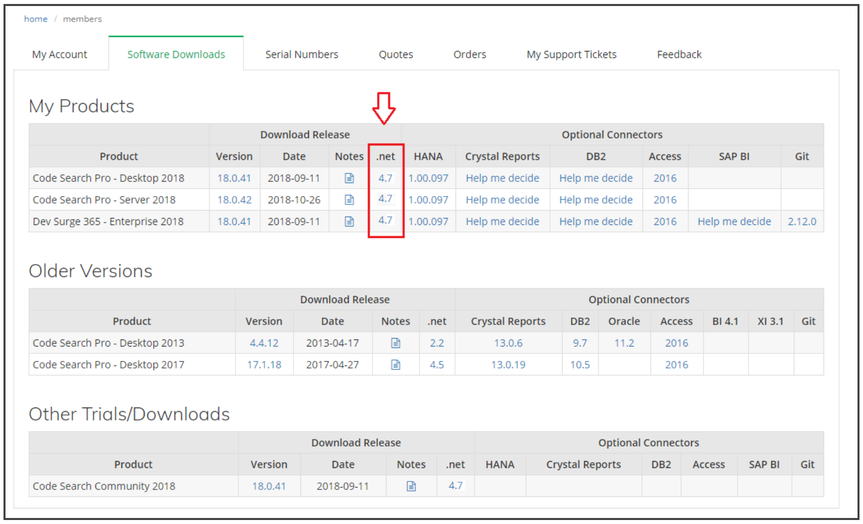
5. To download the selected product release, click on the **Download Now** button.
6. To close the **System Requirements** dialog box, click on the **X** button.

Download .NET Framework

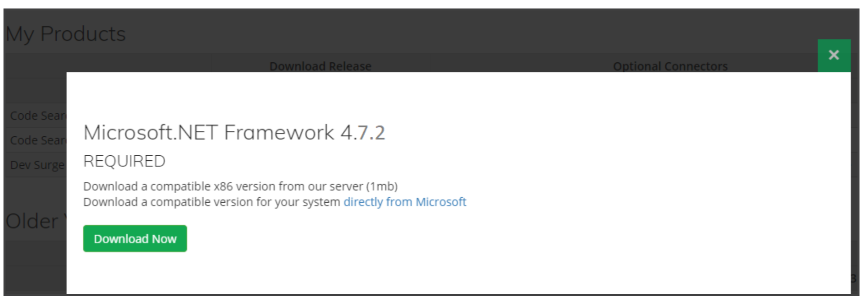
Alert: The .NET framework connector is required. If you do not have the required .NET 4.7.2 pre-installed, you will be prompted to download this prerequisite from Microsoft. We provide an alert and link to the appropriate download page depending on the Windows operating system you are running. The program will not launch until .NET 4.7.2 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.

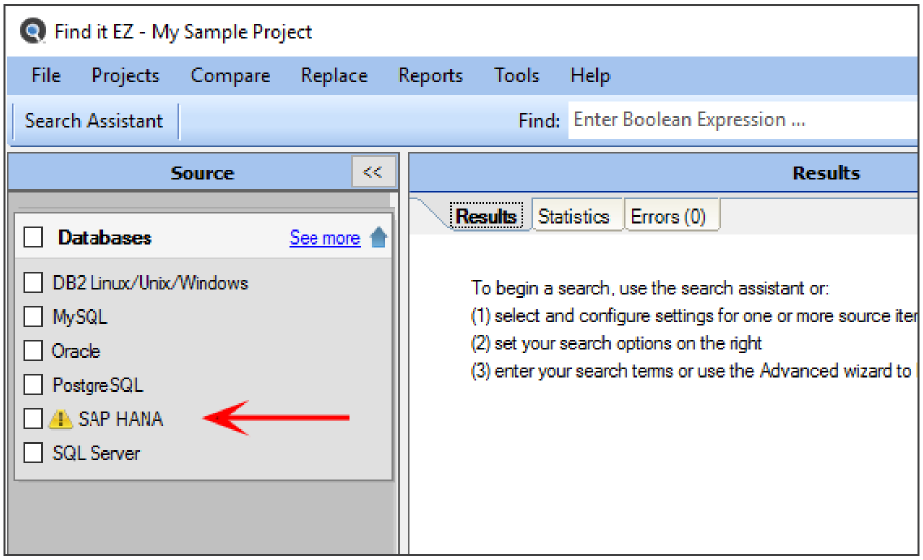


5. To download the selected version from the Find it EZ server, click on the **Download Now** button. OR
6. To download the selected version directly from Microsoft, click on the **directly from Microsoft** link.
7. To close the **Microsoft.NET Framework** dialog box, click on the **Close** or **X** button.

Download Connectors

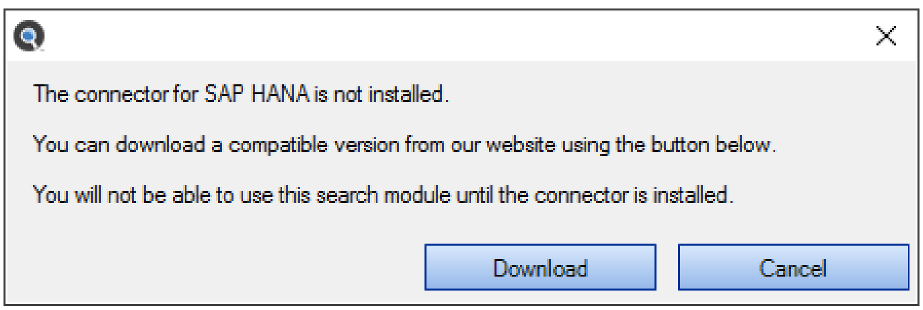
Source items that require a connector will appear with a small warning icon preceding the name. See example below:

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.

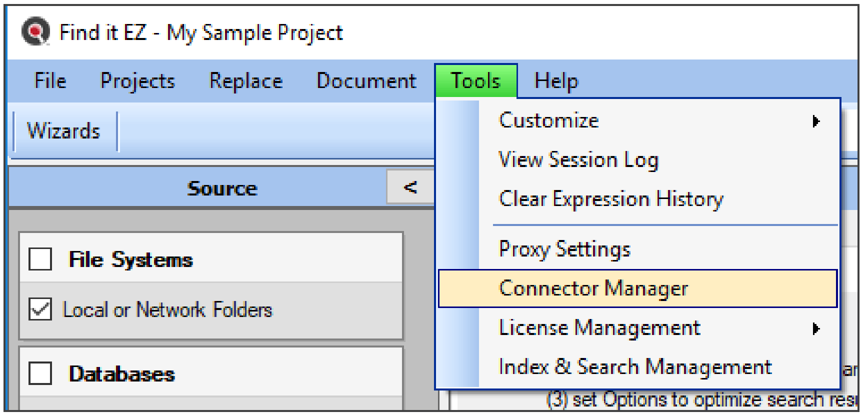
If you try to initiate a search that includes a selected source lacking a required connector, an error message will be generated. See example below:



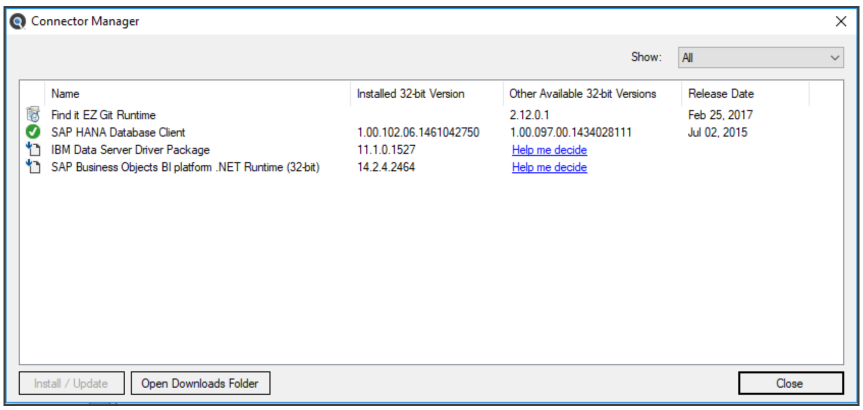
From the Program:

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

1. From the Find it EZ menu, select ***Tools -> Connector Manager*** .



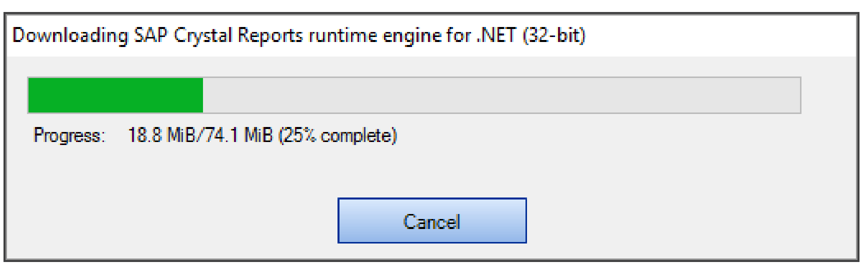
A **Connector Manager** dialog will appear.



2. Optionally select one of the **Show** drop down options to filter the list. For example, selecting the option **Missing** will display a list of required connectors that have not yet been installed based on the source items you have configured using the **Configuration Wizard**.

> **Note:** Items with a check-mark icon next to them indicate you have the minimum or newer connector version detected as already installed on your system.

3. Click on any one of the items with an install icon then click the **Install / Update** button. The connector will begin downloading.



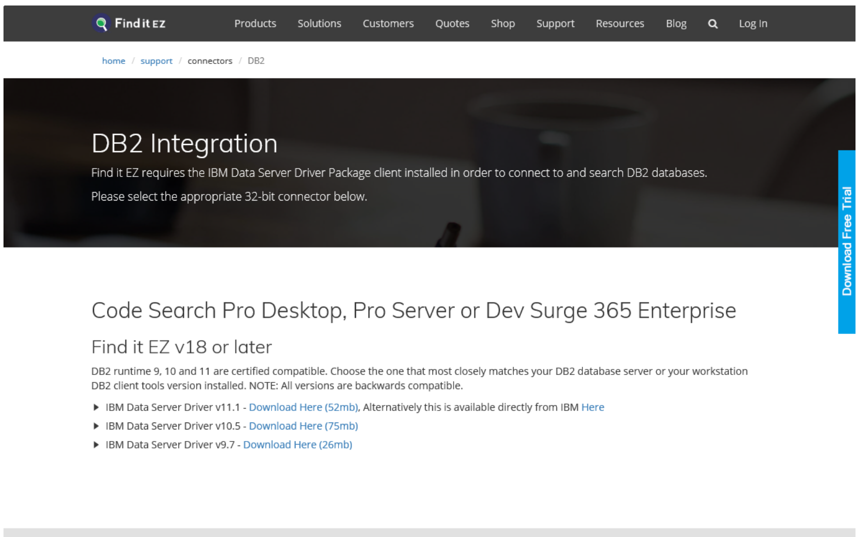
a. Once downloaded, a Find it EZ **InstallShield Wizard** will appear.

b. Click on the **Next** button.

c. Read and follow the instructions provided.

d. When complete, click on the **Finish** button.

4. OR, click on any one of the items with a download compatible version icon , then click the **Help me decide** button or hyperlink for that item. This will launch your browser and open a page on the Find it EZ Software Corp. website to help you select the correct version of the connector based on other related software installed on your workstation. For example, clicking on the "IBM Data Server Driver Package" for the required DB2 connector will take you to this page, see below:



5. Follow the instructions on the website page to select, then download and chose to either save or run the corresponding setup package depending on your browser and network security permissions.

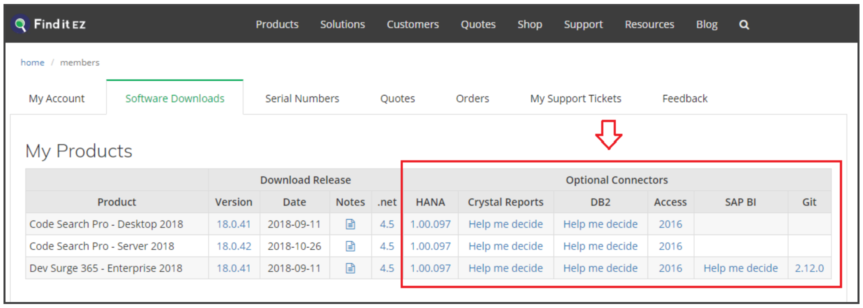
> **Note:** If you chose to save the setup package to your local system, you will then need to locate and run it with administrative rights once the download completes successfully.

> **Tip:** The **Open Downloads Folder** button will contain all downloaded Find it EZ setup packages within this default path: C:\ProgramData\Bits n Bytes Software Inc\Installers . To keep all related downloads organized for re-use, it is recommended that you save these "version compatible" connector setup packages to this specific folder location as well.

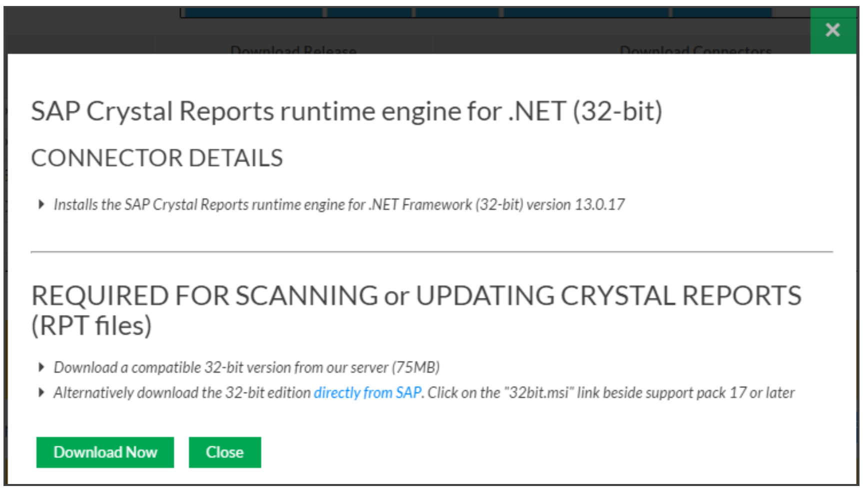
On the Website:

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

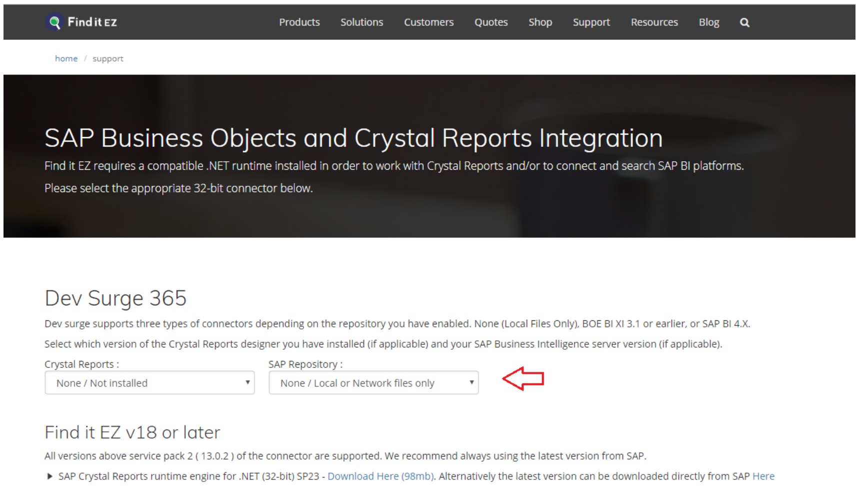
2. Click to select the **Software Downloads** tab. A list of product releases and optional connectors will appear.



3. Locate the product release for which you want to download a connector.
4. In the **Optional Connectors** section of the table, click on the corresponding hyperlink in the desired connector column. For all hyperlinks that do not contain the text **`Help me decide`**, 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.
9. OR, in the **Optional Connectors** section of the table, if you chose any connector with the hyperlink text **`Help me decide`**, a website page will display with instructions to guide you through selecting a compatible version depending on related software that may be installed on your workstation or network environment. See example below:



10. Follow the instructions on the web page to filter the recommended compatible version of the connector to be installed.
11. Once the recommended connector download link is displayed, click to download and chose to either save or run the corresponding setup package depending on your browser and network security permissions.

    Note: If you chose to save the setup package to your local system, you will then need to locate and run it with administrative rights once the download completes successfully.

See Also:

- "Check for Updates" on page 25
- "Download Release Version" on page 240
- "Download .NET Framework" on page 246

Serial Numbers

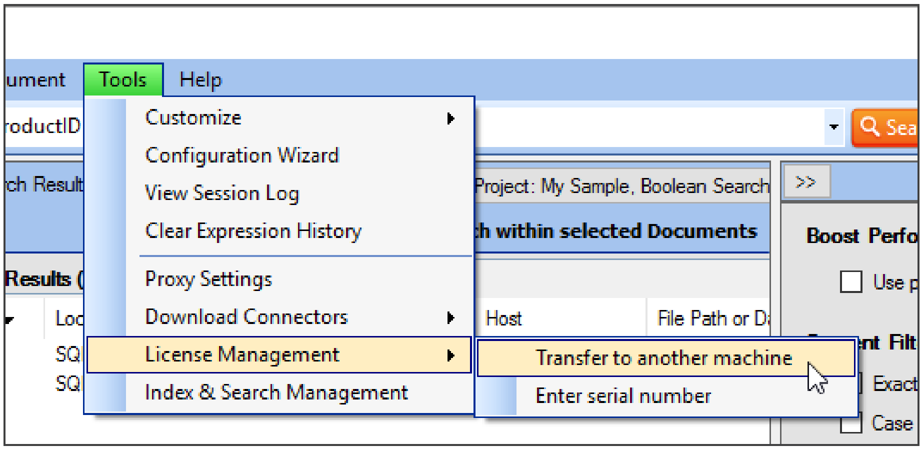
The **Serial Numbers** tab on the member website allows you to manage or transfer your current Find it EZ product license, obtain a new trial license, activate or manually activate a product, review software assurance plans and license type options.

Follow the steps below to view your current Find it EZ product serial numbers.

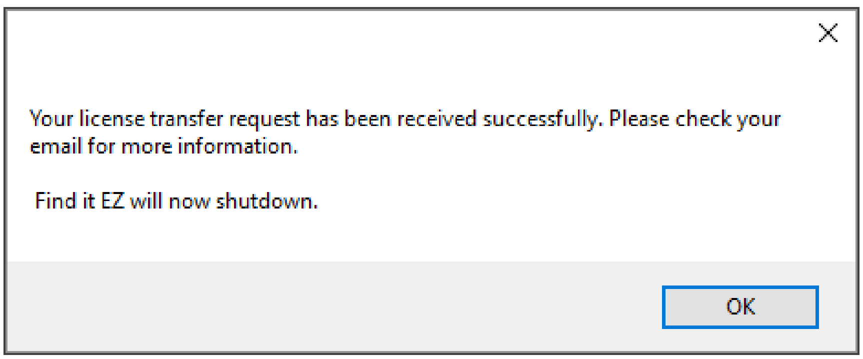
View or Transfer Current License

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:



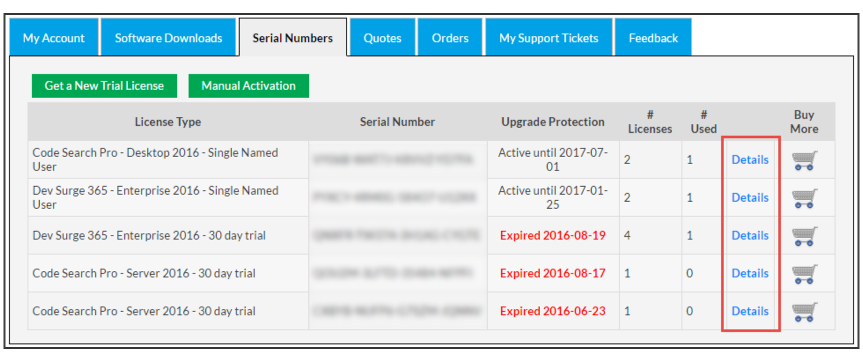
2. Click on the **OK** button to shut down Find it EZ on the current machine. A request will be automatically sent to Find it EZ product support, and you will receive a confirmation email once the transfer request has been reviewed and processed within one business day.

3. Open your e-mail and follow the instructions to transfer the license to a new machine.

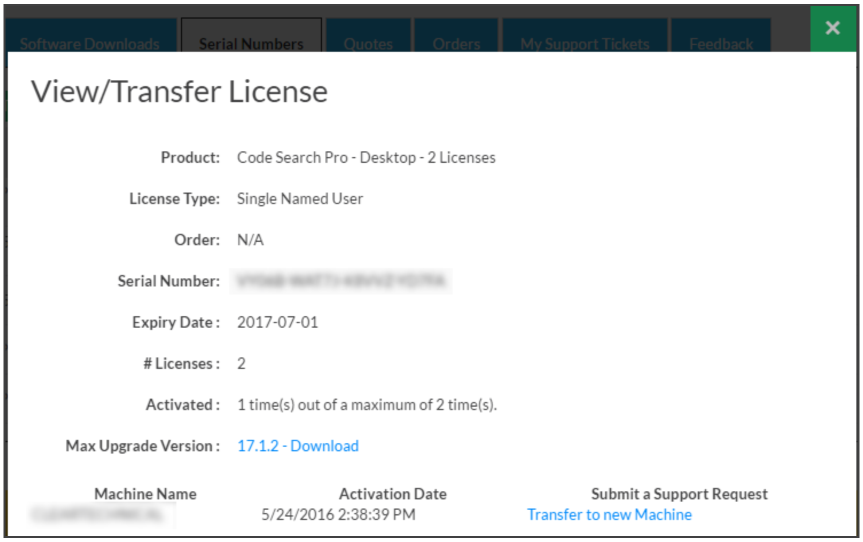
On the Website:

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

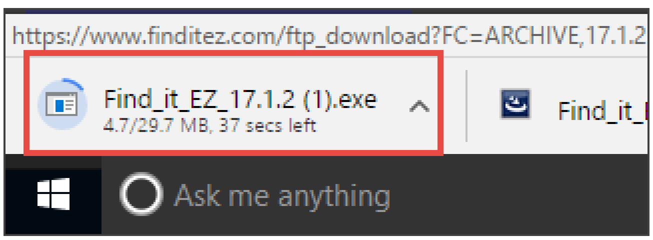
2. Click to select the **Serial Numbers** tab. Locate the product for which you want to view or transfer a license.



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:



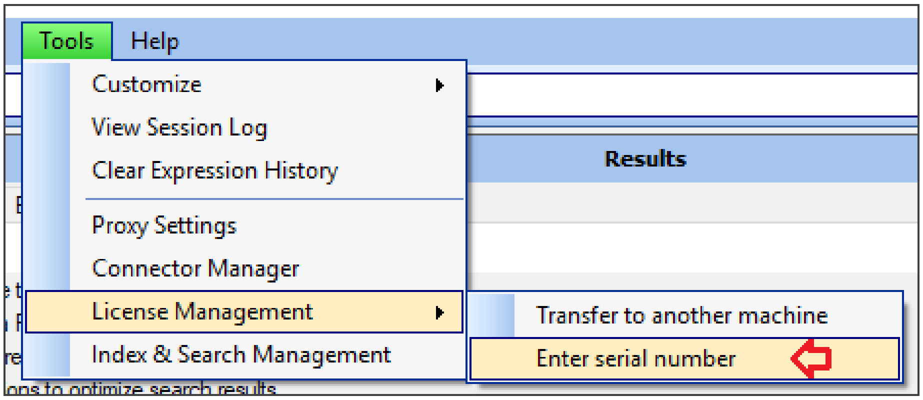
5. To transfer the license to a new machine, click on the **Transfer to new Machine** link. A confirmation message will appear, as below:

   To close this message, click on the **OK** button.

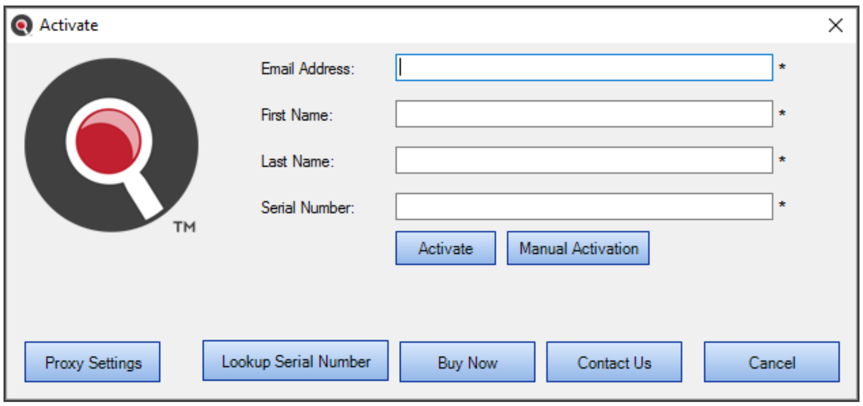
6. To close the **View / Transfer License** dialog box, click on the **X** button. You will receive a confirmation email once the transfer request has been reviewed and processed within one business day.

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: If access to the Internet is protected by a proxy firewall within your network, click on the **Proxy Settings** button and enter the required credentials before clicking the **Activate** button. For more information, see "View or Edit Proxy Settings" on page 8

Note: Input fields with an "*" are required.

3. Click on the **Activate** button.

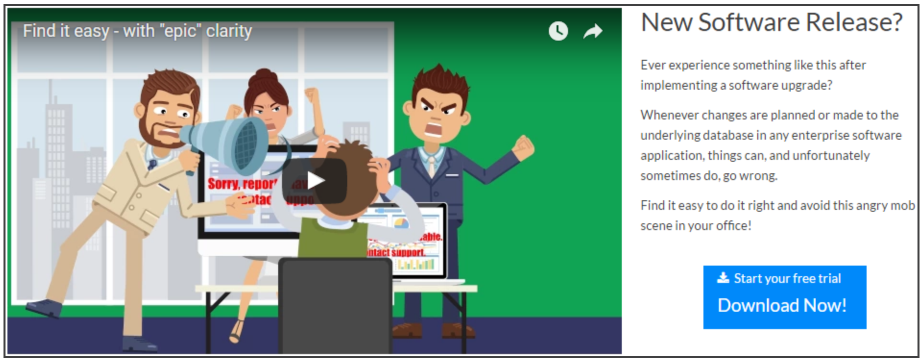
See Also:

- "Activate License" on page 19

Get a New Trial License

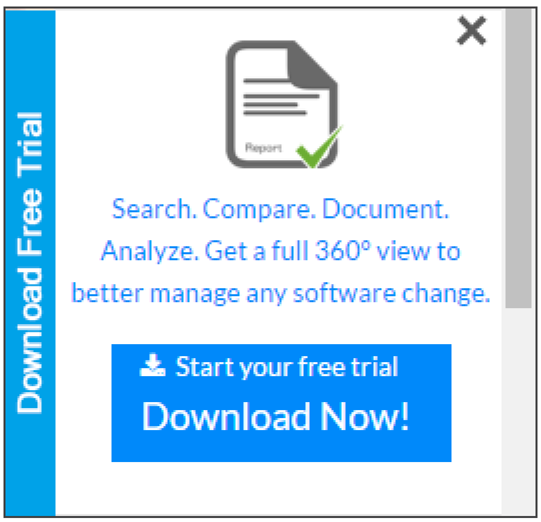
On the Public Website:

Visit https://www.finditez.com/ and click on any of the "download trial" links:



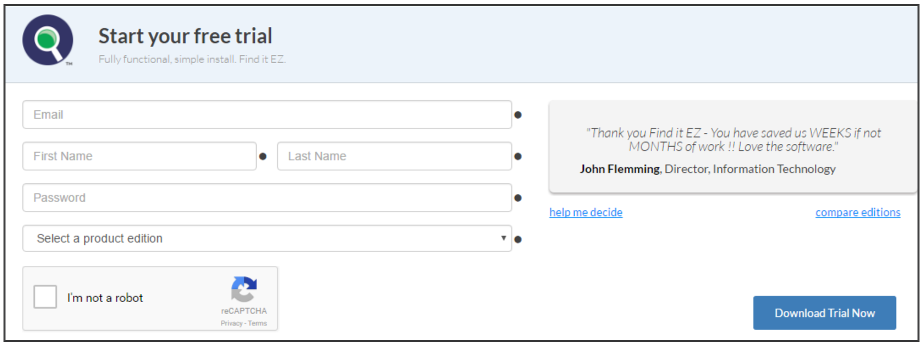
The following trial download form is available in the footer area of all web pages:

The following slide-out menu is available on the right-hand side of all but the home page:



OR

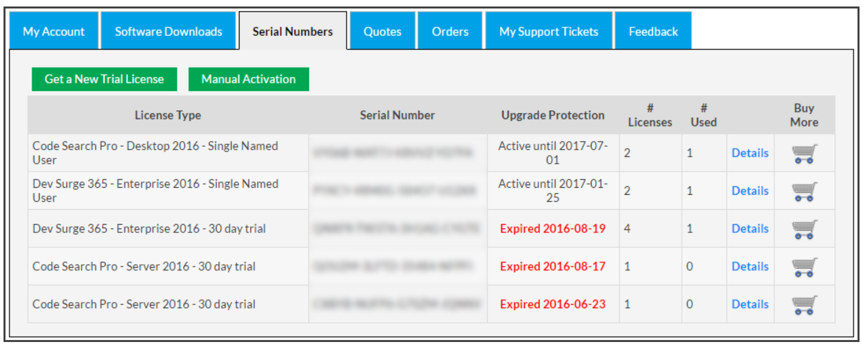
Visit https://www.finditez.com/freetrial for direct access to the **Start your free trial** download form.



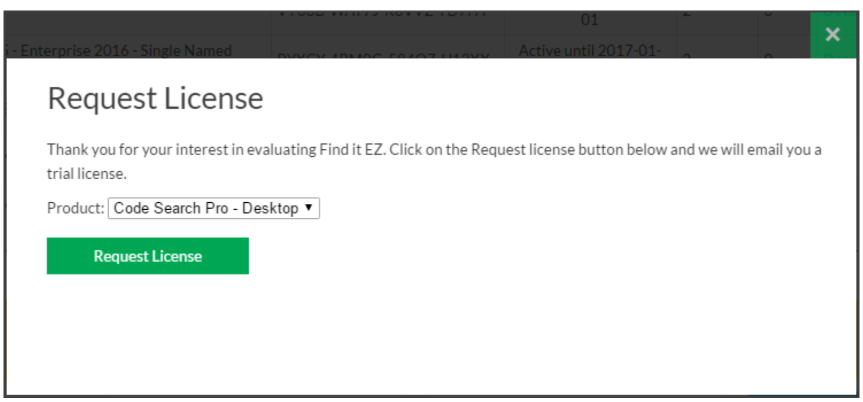
1. Complete the form and click to select the desired product edition.
2. Click on the **Download Trial Now!** button. If eligible, your trial setup file will begin to download and a confirmation email with your trial key will be sent to the email address provided.

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.

See Also:

- "Activate License" on page 19
- "Activate License Manually" on page 20

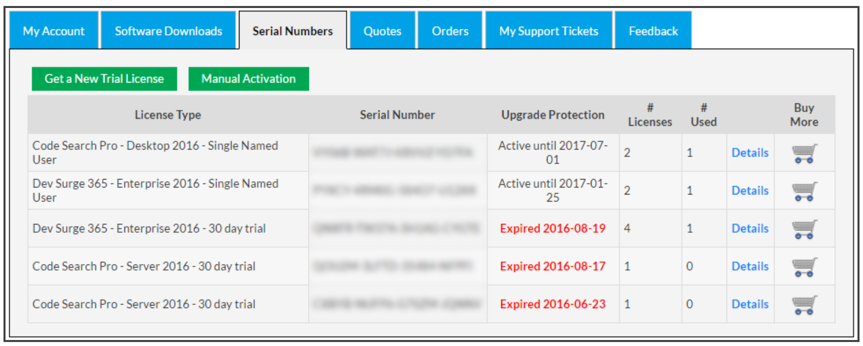
Purchase Licenses

On the Public Website:

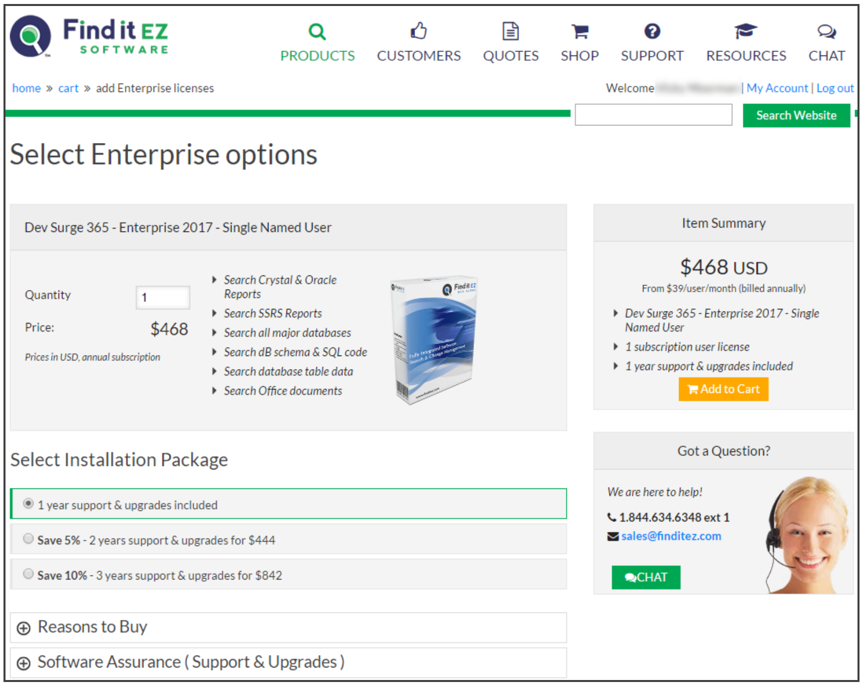
See "Create a New Order" on page 275

On the Member Website:

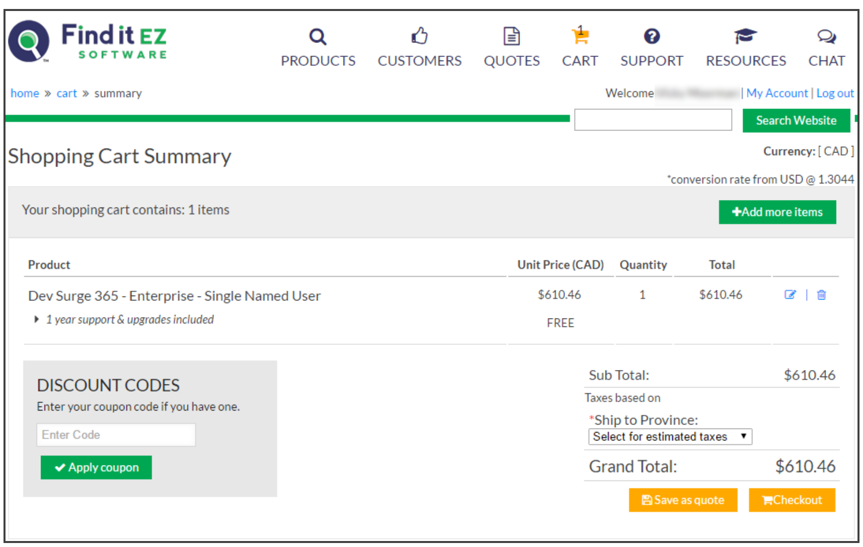
1. Log in to your Find it EZ Member Account.
2. Click to select the **Serial Numbers** tab.
3. In the **License Type** column on the left, locate the product edition for which you want to purchase additional licenses.



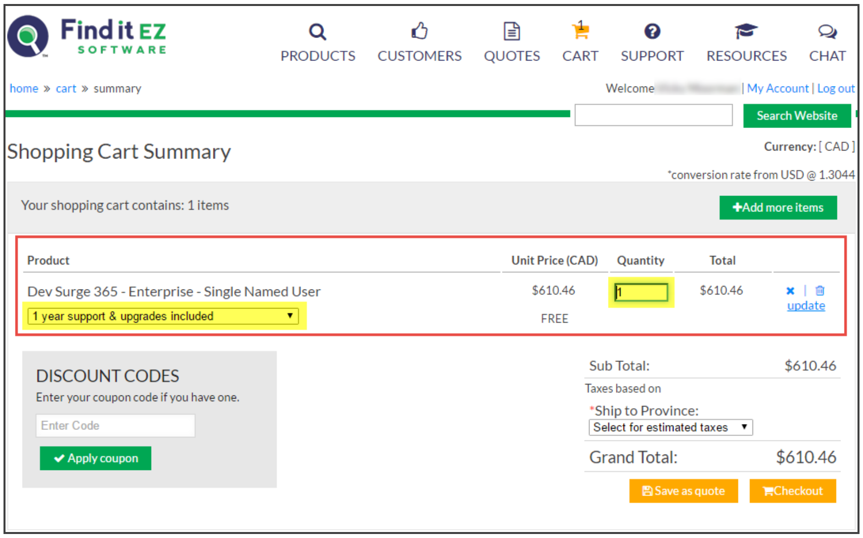
4. In the **Buy More** column, click on the corresponding shopping cart icon. The **Select Enterprise options** form will appear. See example below:



5. Enter the desired **Quantity**.
6. In the **Select Installation Package** section, click to choose the desired package / software 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:

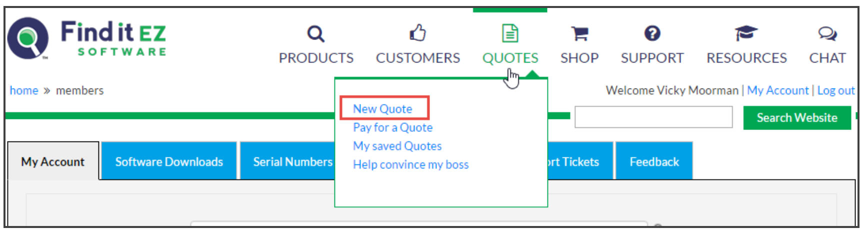
- "License Agreements and Statements" on page 287

Quotes

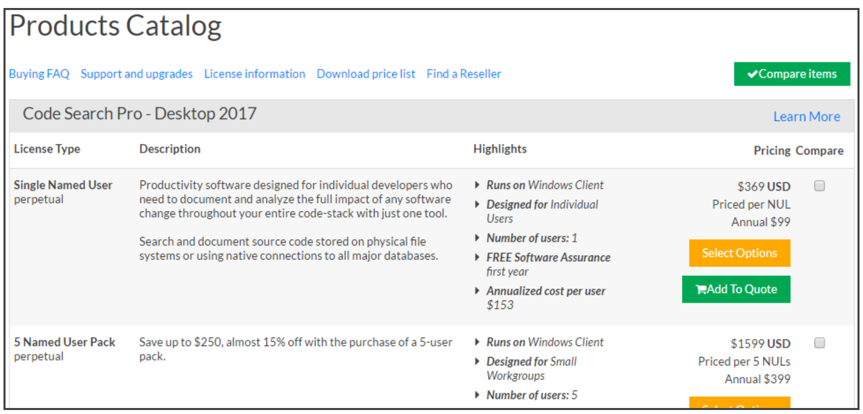
A quote is a 15 day price guarantee with no obligation to pay by the customer. The **Quotes** tab on the member website allows you to compare products, create and view quotes, and pay for a quote.

Create a New Quote

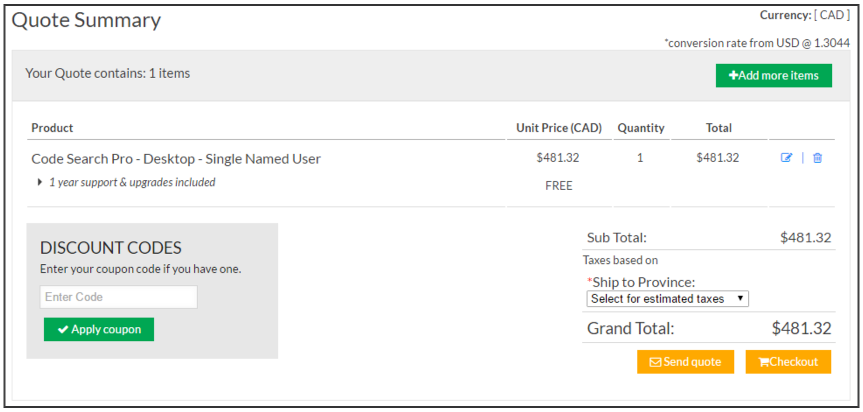
1. Visit https://www.finditez.com/.



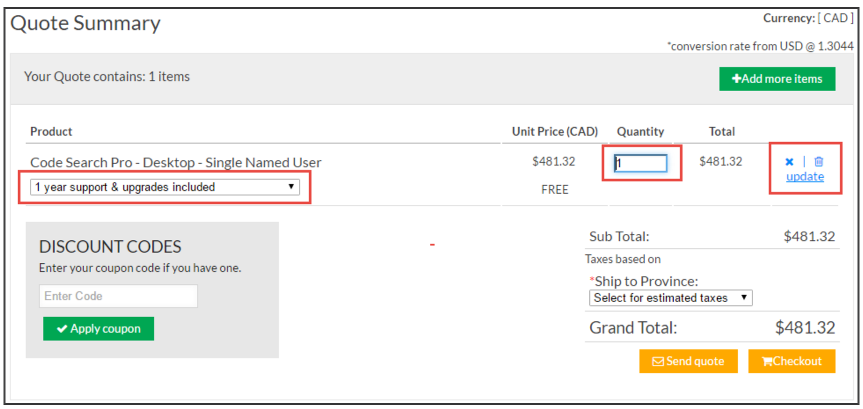
2. From the menu at the top of the page, select ***Quotes -> New Quote***. The **Products Catalog** will appear.



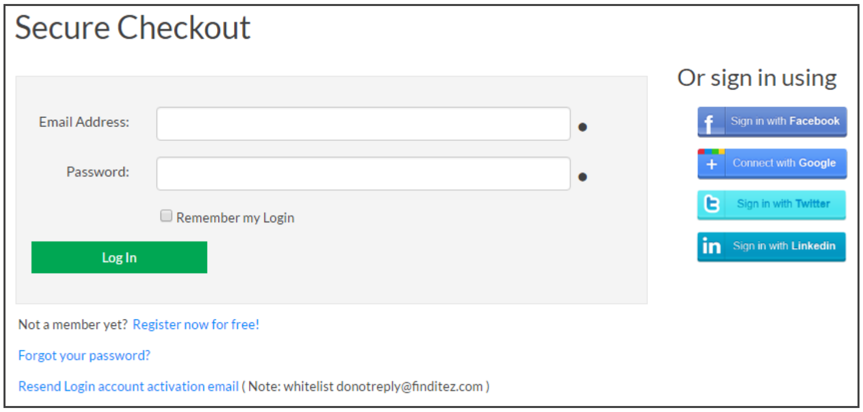
3. Using the vertical scroll bar, locate the product that you want to add to a quote.
4. Click on the corresponding green **Add to Quote** button. A **Quote Summary** page will appear.



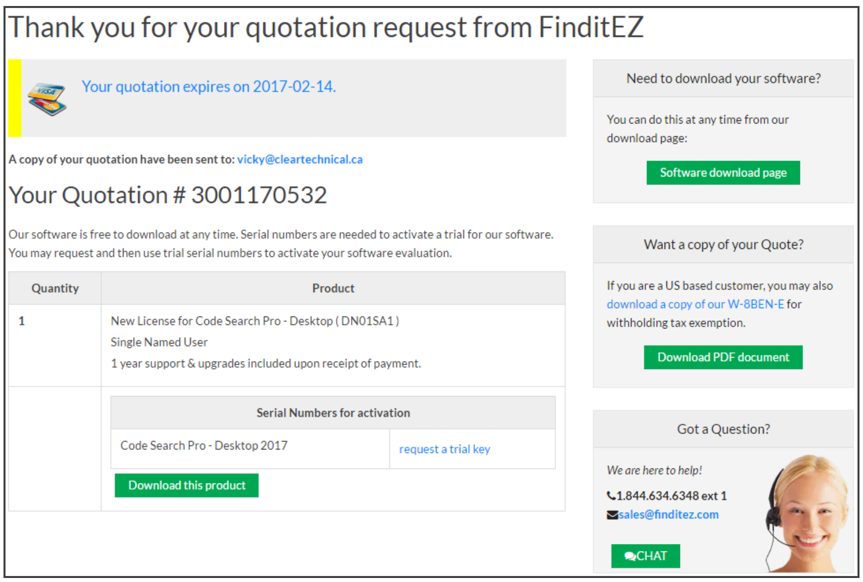
5. To add more items, click on the green **+ Add More Items** button. The **Products Catalog** will appear (see above).
6. To edit or delete an item, click on the corresponding blue edit or delete icon located to the right of each item. See example below:



   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:



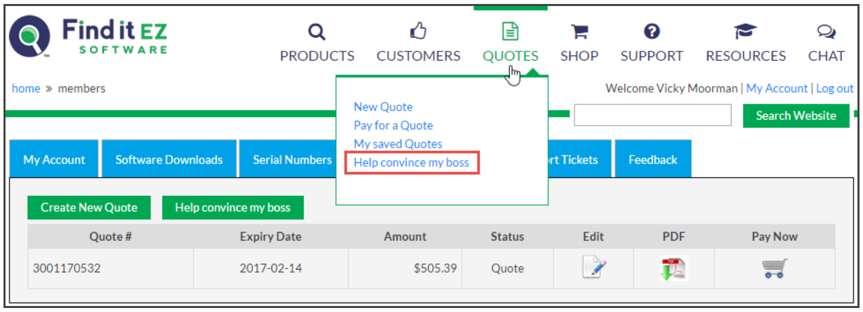
10. A confirmation screen will appear with your quote information along with product trial download links. See example below:



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/.

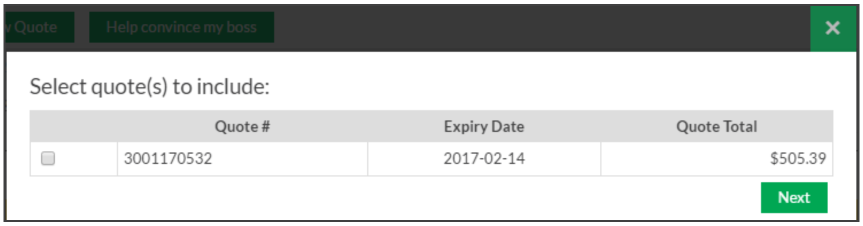


2. From the menu at the top of the page, select ***Quotes -> Help convince my boss***. The following wizard step 1 will appear:

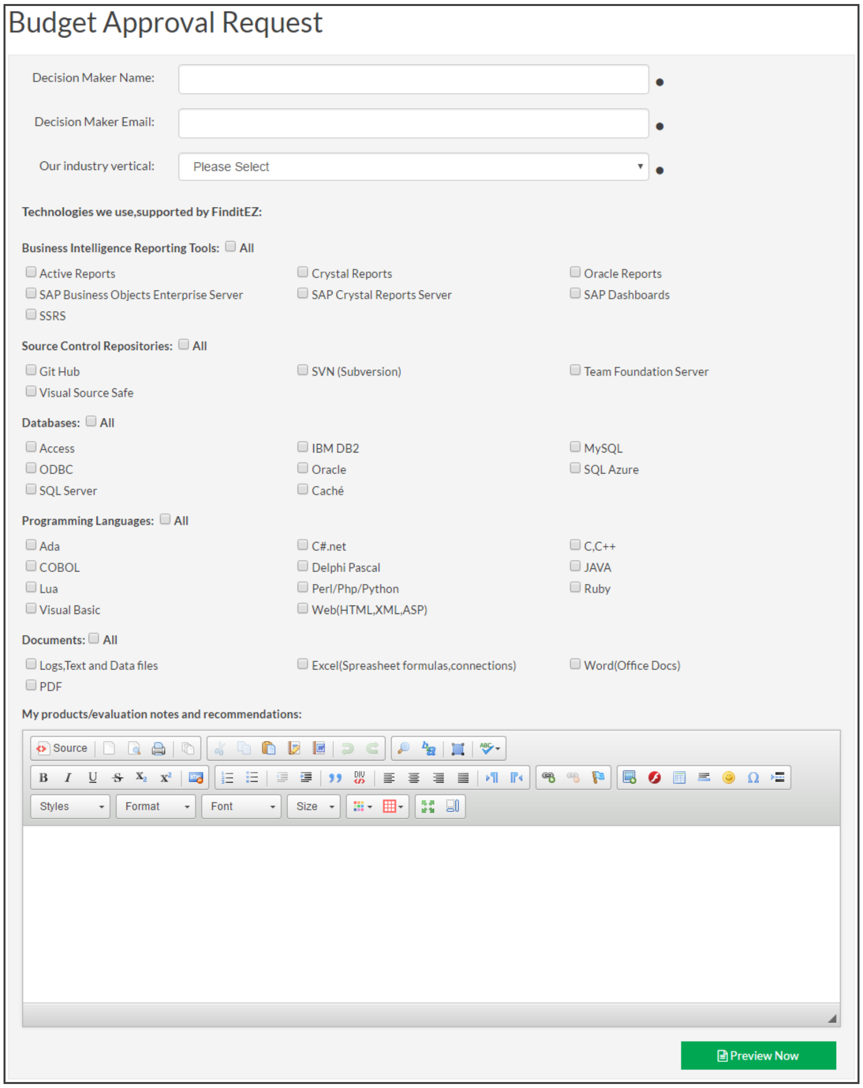
3. Click to chose "Create a new Quote" or "Select one or more existing quotes".

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:

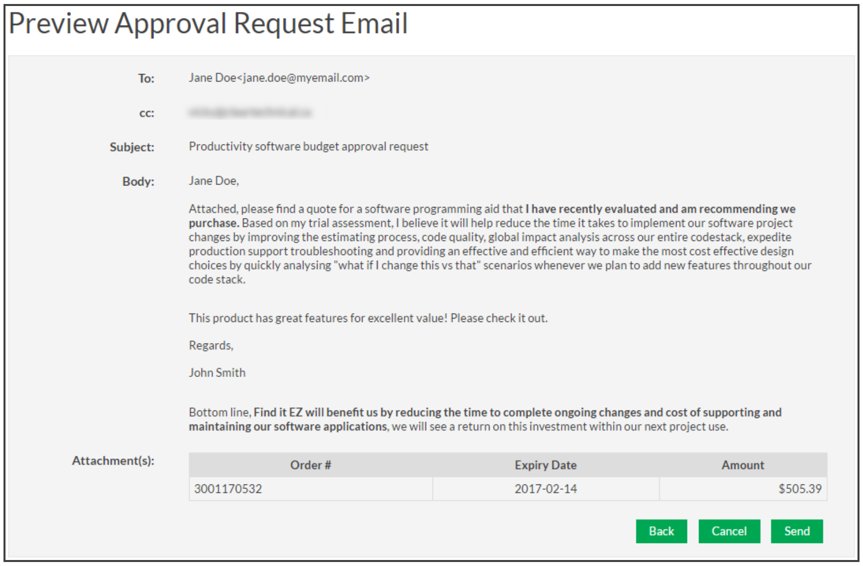
4. Once you have created a new quote or logged in to your Find it EZ account, you will be prompted to select one or more quotes to attach to the e-mail. See example below:



Select the desired quote(s) and then click on the **Next** button. A **Budget Approval Request** form will appear, as below:

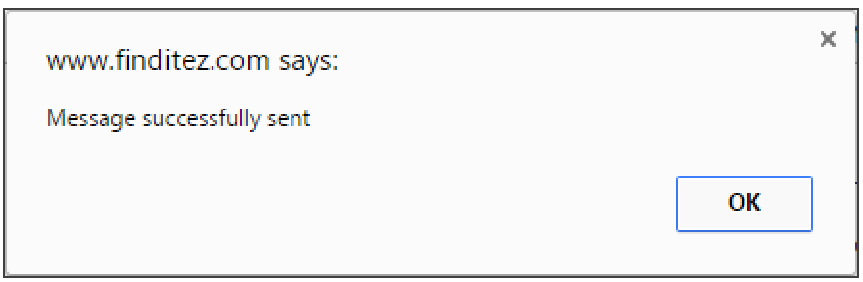


5. Fill in the **Budget Approval Request** form. Items with a dot are mandatory. You will have an opportunity to review and change the contents of the generated email prior to sending. The more data provided in the form, the more complete the generated email template will be. Once complete, click on the **Preview Now** button.



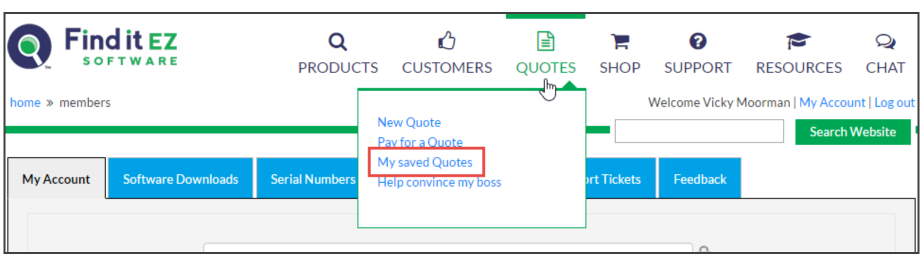
6. To make changes to the email body produced, click on the **Back** button and repeat step 5. If the contents are approved, click the **Send** button. To abort, click the **Cancel** button.

> **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.

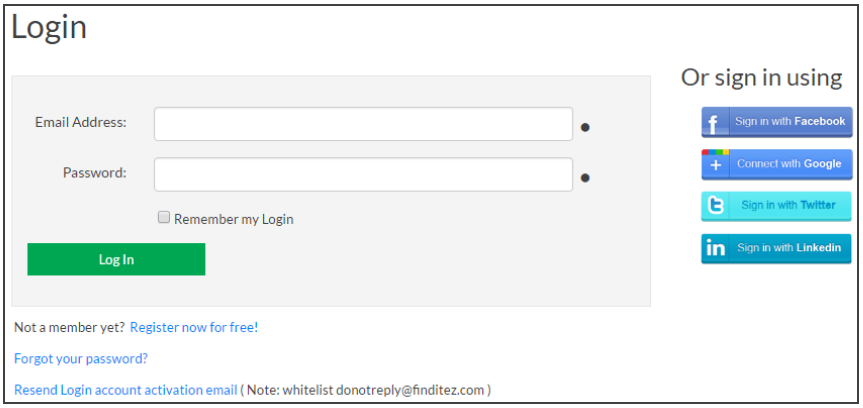


View or Change Saved Quotes

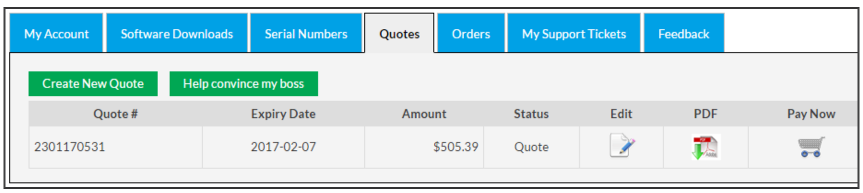
You may change the contents of a pending, open quote, including adding or removing items, increasing or decreasing item quantity, or changing the support length for individual items in the quote.



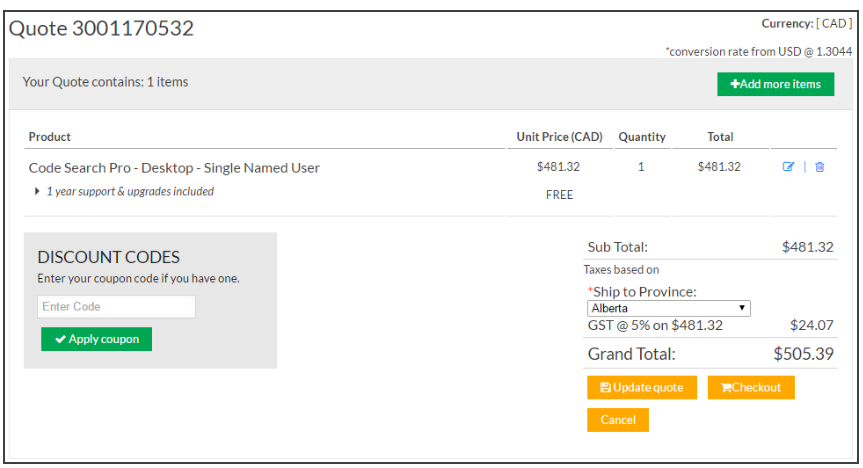
1. Visit https://finditez.com/. From the menu at the top of the page, select ***Quotes -> My Saved Quotes***. If you are not logged in, you will be prompted to do so for access to your saved quotes.



2. Log in to your Find it EZ member account. A table will appear showing the quote **Quote #**, **Expiry Date**, **Amount**, and **Status**.



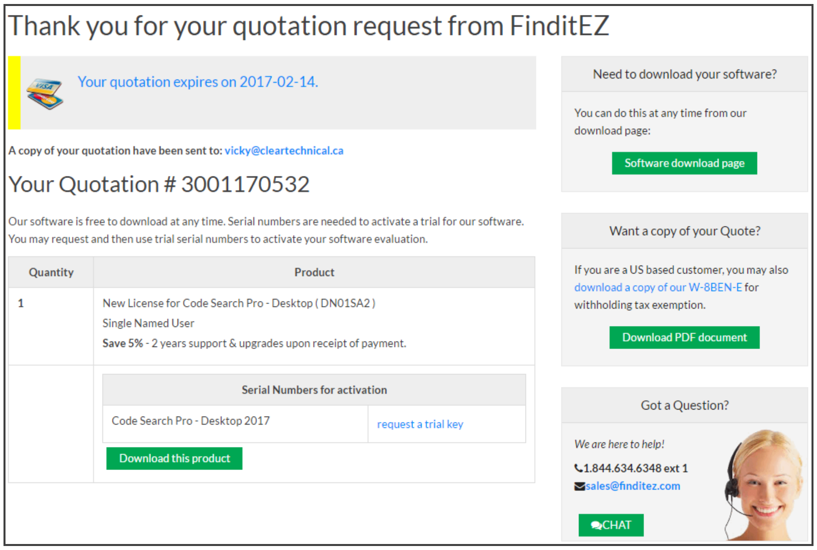
3. To edit the quote, click on the corresponding **Edit** icon.



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.

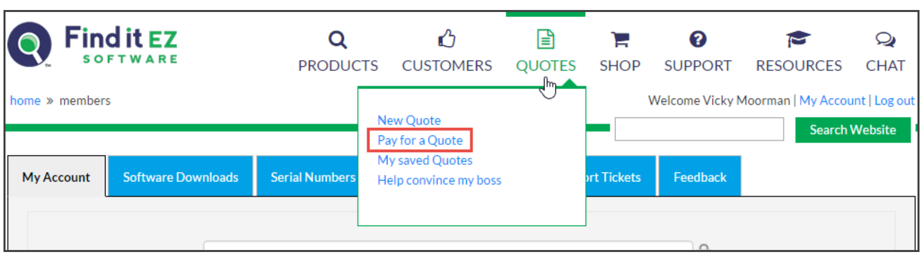


4. To download the quote in PDF file format, click on the corresponding **PDF** icon.

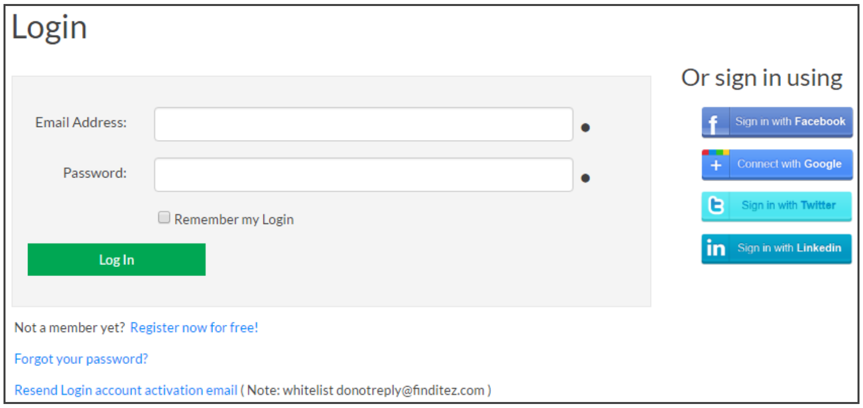
   a. The quote will open as a PDF in a new browser window.

   b. Download or Print the document as desired.

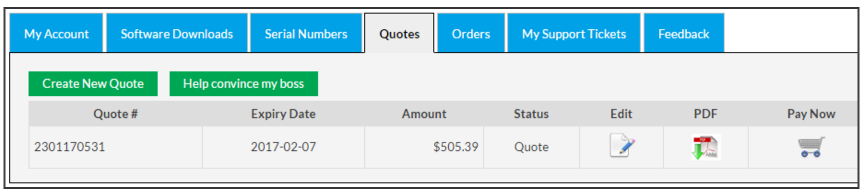
Pay for a Quote



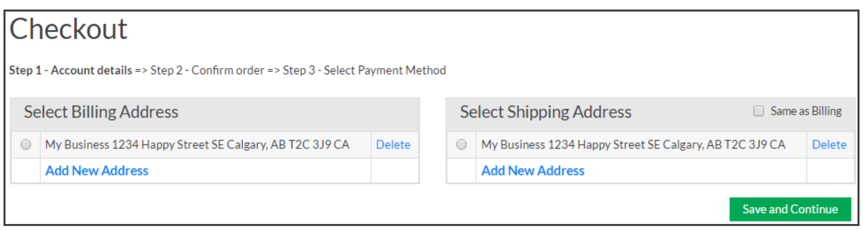
1. Visit **https://www.finditez.com/**. From the menu at the top of the page, select ***Quotes -> Pay for a Quote***. If you are not logged in, you will be prompted to do so for access to your saved quotes.



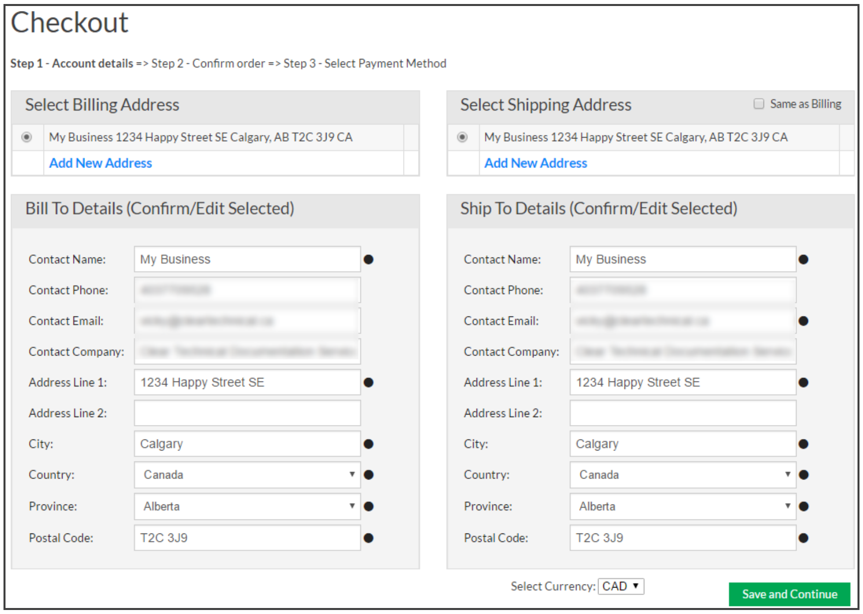
2. Log in to your Find it EZ member account. A table will appear showing the quote **Quote #**, **Expiry Date**, **Amount**, and **Status**.

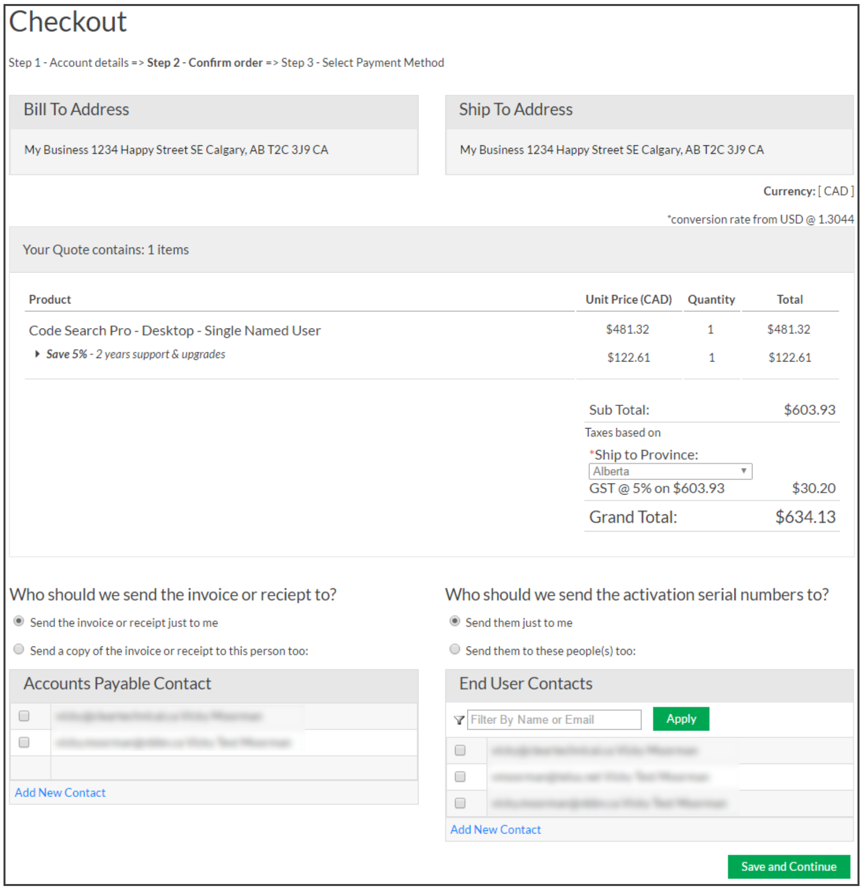


3. In the **Pay Now** column, click on the corresponding shopping cart icon. The **Checkout** dialog box will appear.

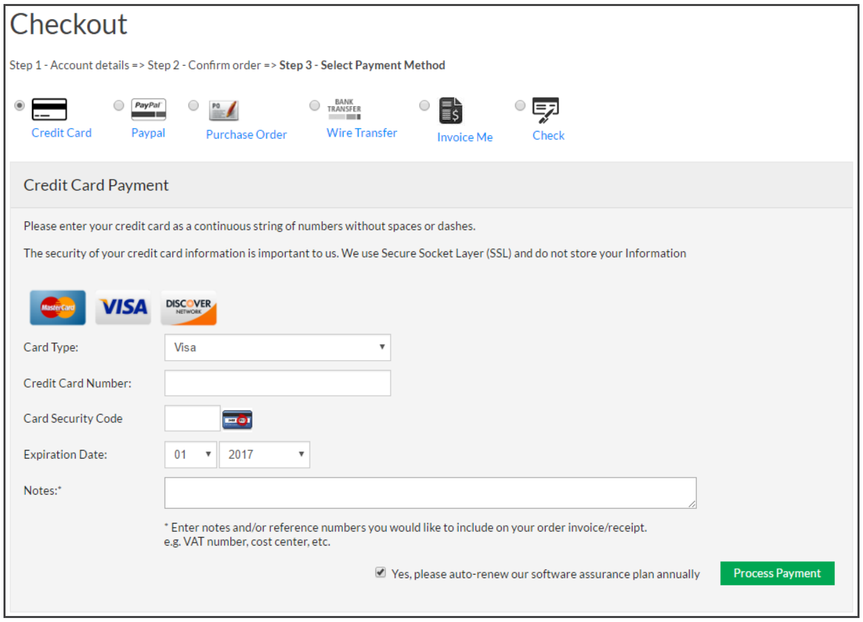


4. Select the **Billing** and **Shipping Address**, then click on the **Save and Continue** button.


Checkout
Step 1 - Account details => Step 2 - Confirm order => Step 3 - Select Payment Method
Select Billing Address
My Business 1234 Happy Street SE Calgary, AB T2C 3J9 CA
Add New Address
Select Shipping Address
Same as Billing
My Business 1234 Happy Street SE Calgary, AB T2C 3J9 CA
Add New Address
Bill To Details (Confirm/Edit Selected)
Contact Name:
My Business
Contact Phone:
Contact Email:
Contact Company:
Address Line 1:
1234 Happy Street SE
Address Line 2:
City:
Calgary
Country:
Canada
Province:
Alberta
Postal Code:
T2C 3J9
Ship To Details (Confirm/Edit Selected)
Contact Name:
My Business
Contact Phone:
Contact Email:
Contact Company:
Address Line 1:
1234 Happy Street SE
Address Line 2:
City:
Calgary
Country:
Canada
Province:
Alberta
Postal Code:
T2C 3J9
Select Currency:
CAD
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.

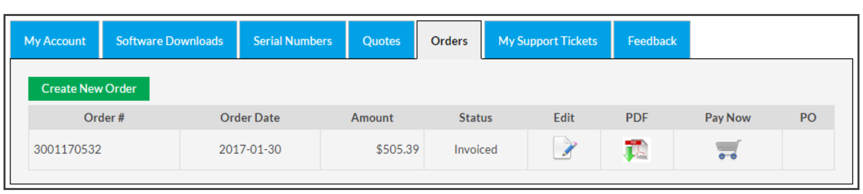
Orders

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.

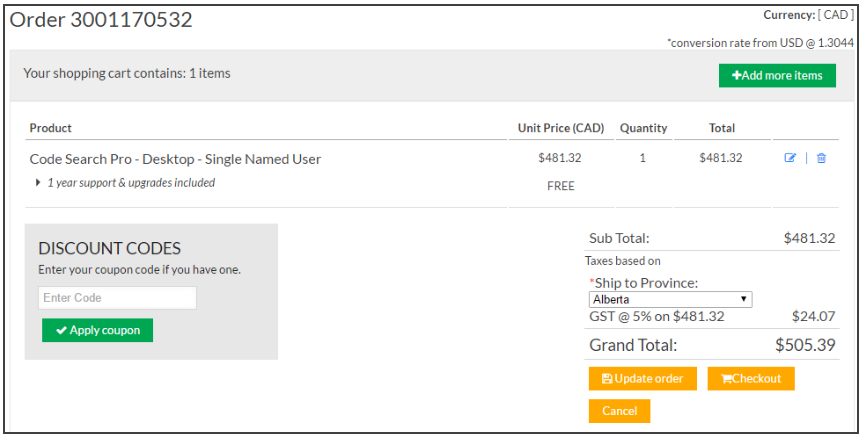
View or Change My Orders

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.



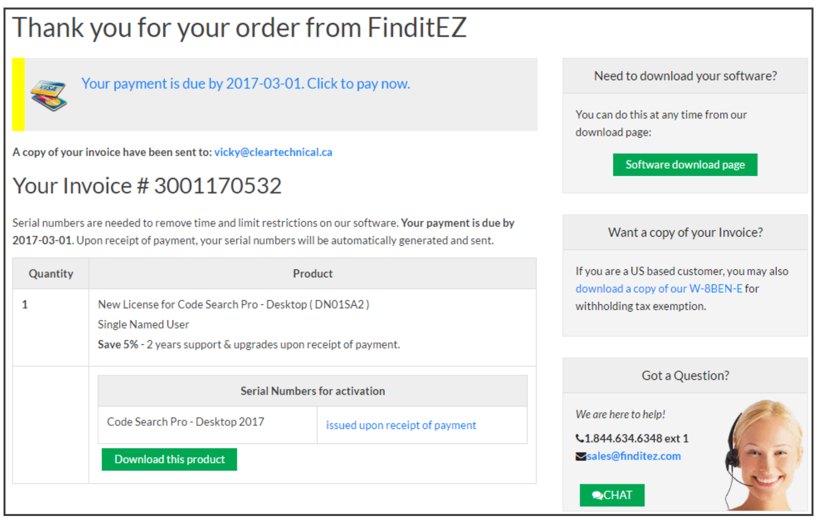
3. To edit the order, click on the corresponding **Edit** icon.



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.

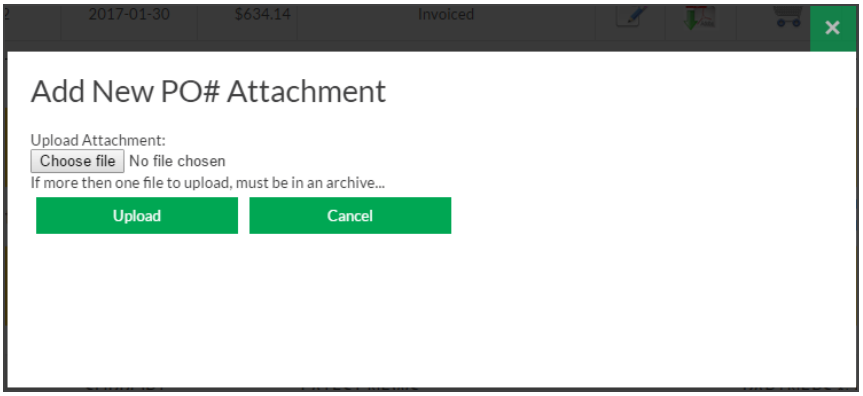


4. To download the order in PDF format, click on the **PDF** icon.

a. The order will open as a PDF in a new browser window.

b. Download or print the document as desired.

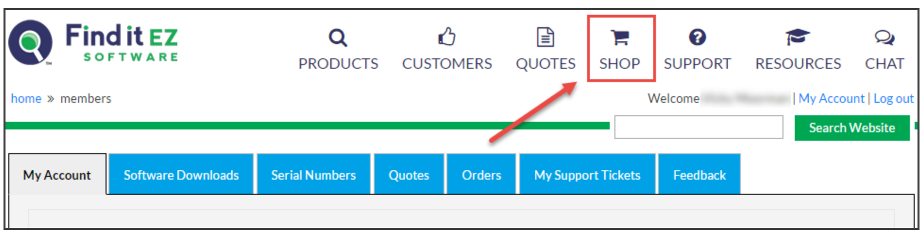
5. To upload an electronic copy for an order where the payment method selected was by **Purchase Order**, click on the **Add** button under the **PO** column.



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

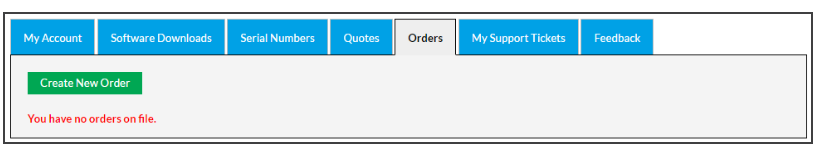


1. Visit https://www.finditez.com/. From the menu at the top, select **Shop**.

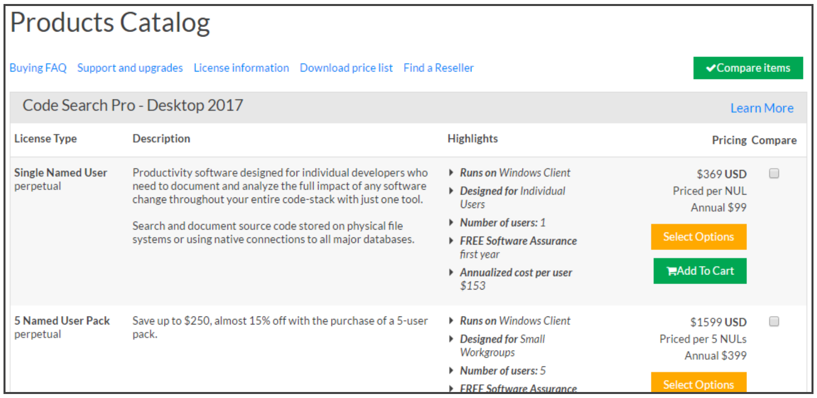
   OR

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

   a. Select the **Orders** tab.

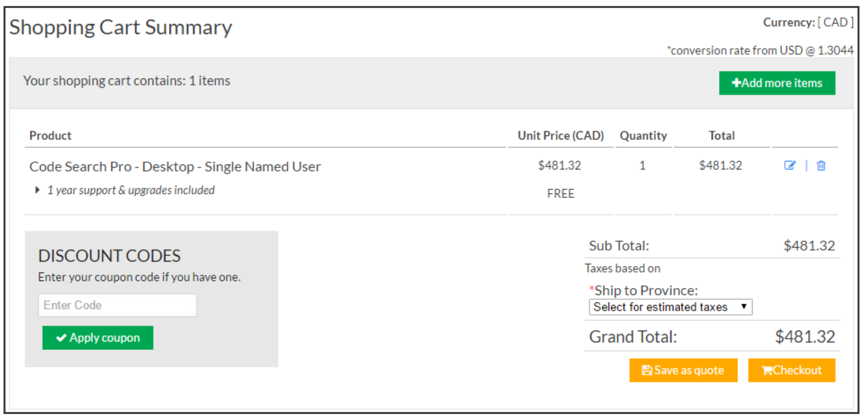


b. Click on the **Create New Order** button. The **Products Catalog** will appear.



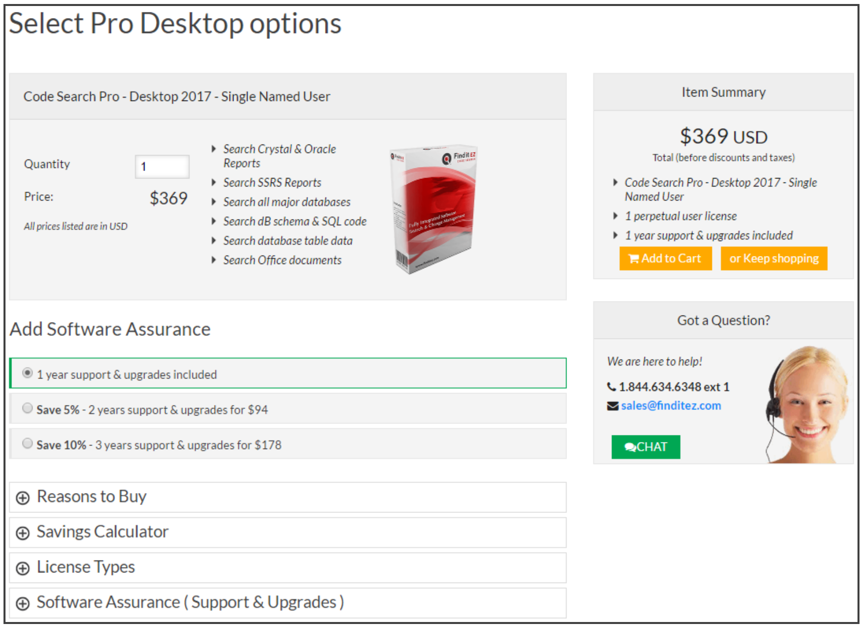
3. Locate the product(s) you want to add to your order.

4. To select a product, click on the corresponding **Add to Cart** button. Go to step 6.

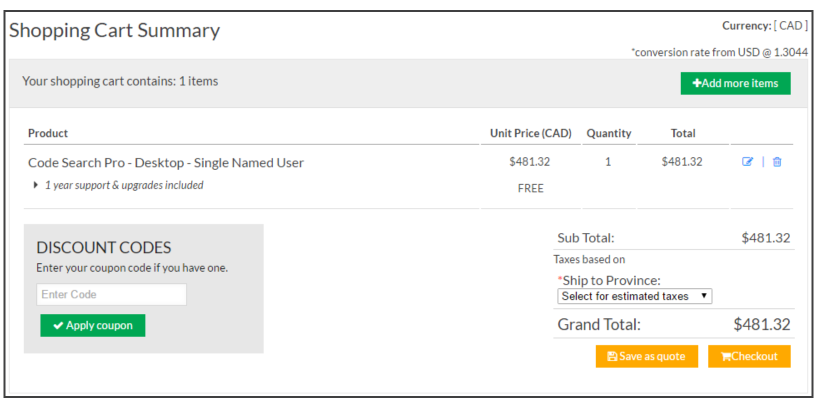


OR

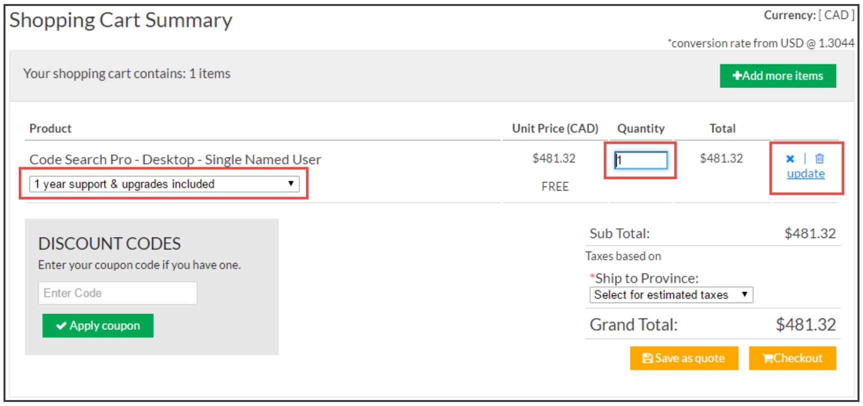
5. To select product options, click on the corresponding **Select Options** button.



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.

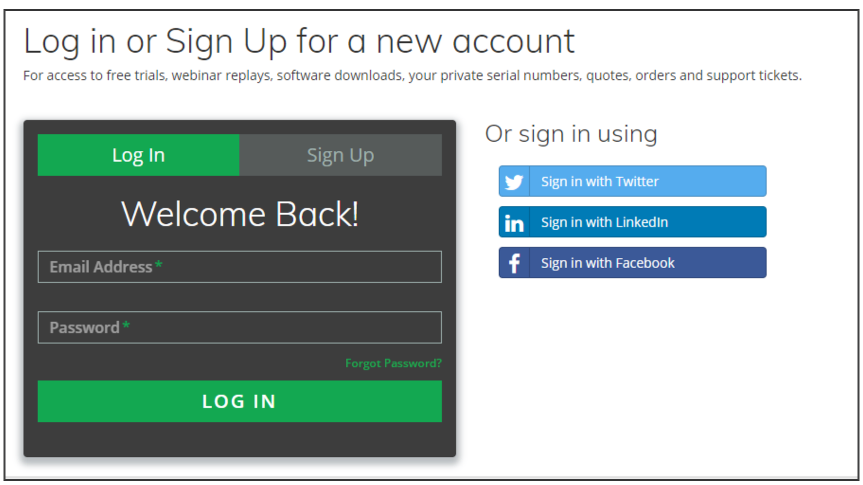


   a. Make changes to the **Quantity** or **Software Assurance** selection, as desired.
   b. To save your changes, click on the blue **Update** link.

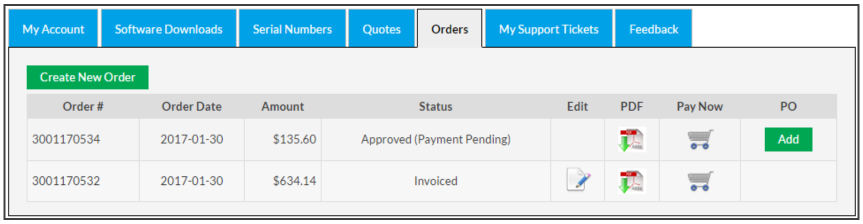
8. Where applicable, enter a **Discount Code** and click on the **Apply Coupon** button.
9. To save the order as a quote, click on the **Save as quote** button.
10. To pay for the order, click on the **Checkout** button.

Pay for an Order

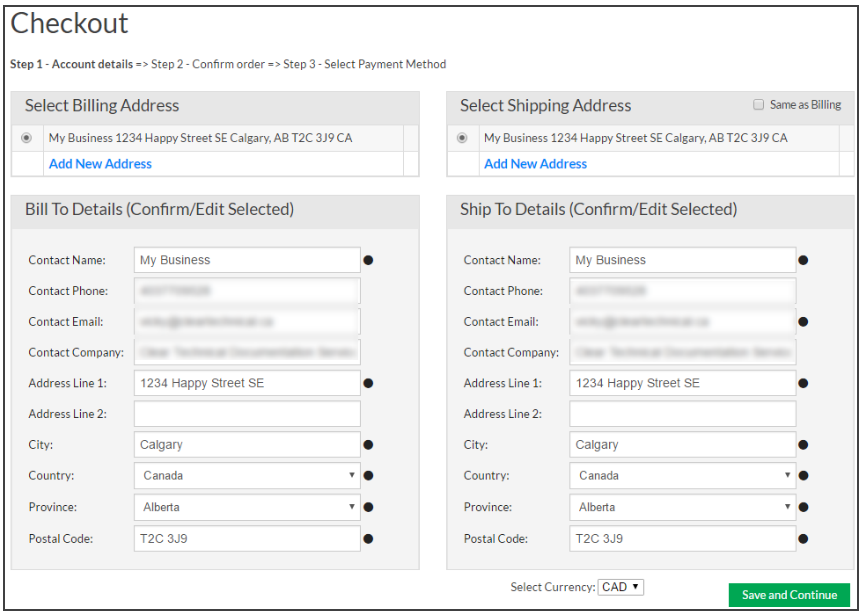
1. Log in to your Find it EZ Member Account.



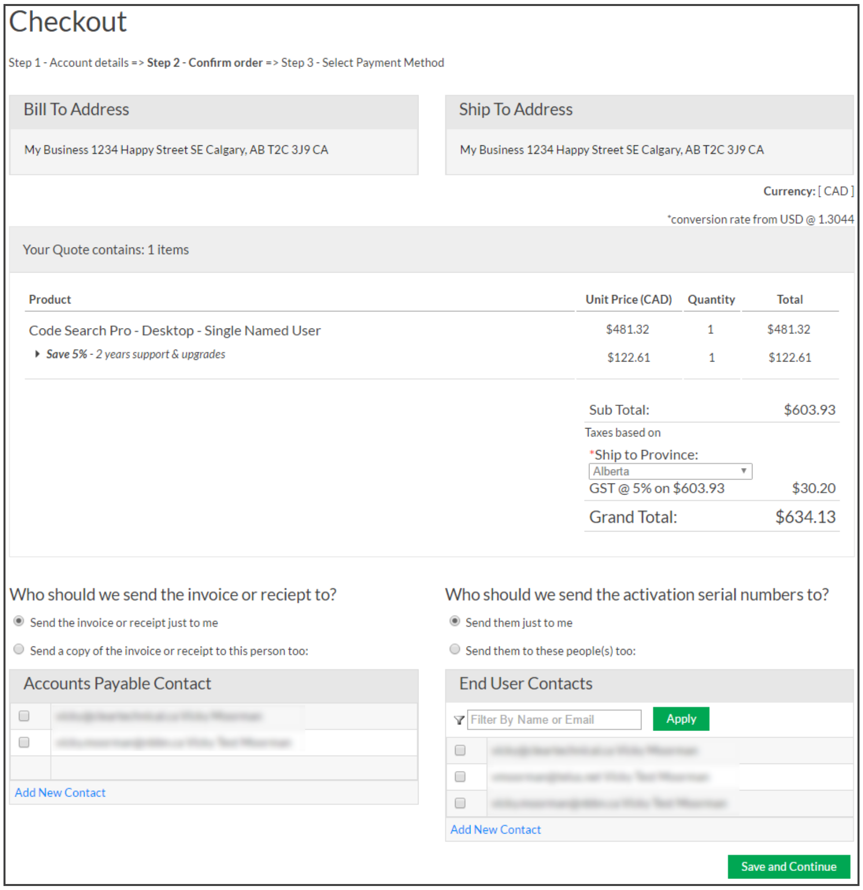
2. Click on the **Orders** tab. A table will appear showing the **Order #**, **Expiry Date**, **Amount**, and **Status**. Locate the order for which you want to pay.



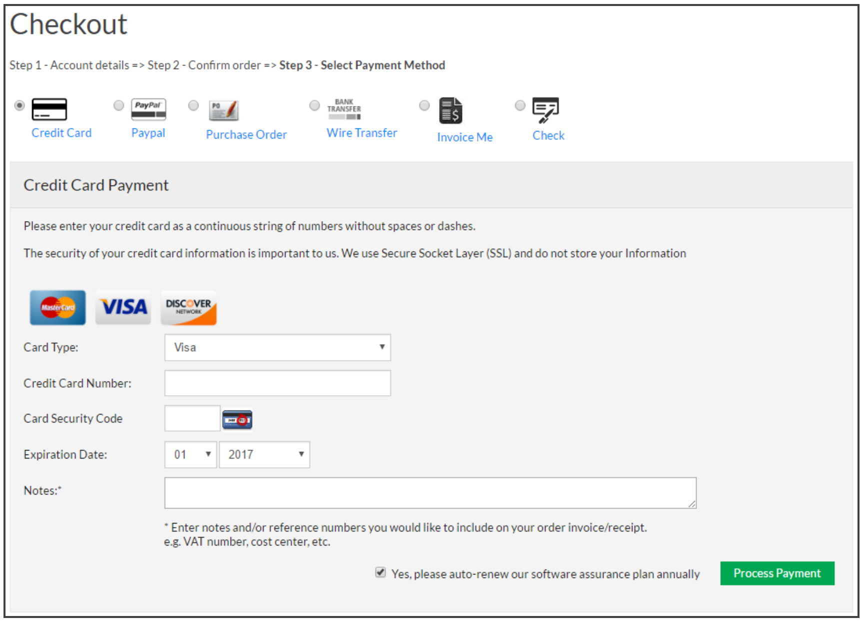
3. In the **Pay Now** column, click on the corresponding shopping cart icon. The **Checkout** dialog box will appear.



4. Select the **Billing Address** and **Shipping Address**, then click on the **Save and Continue** button.



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

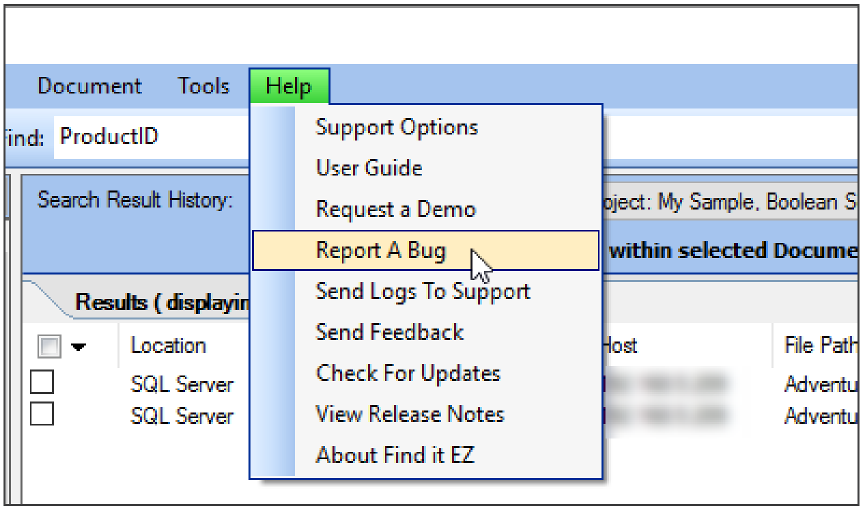
The **My Support Tickets** tab on the member website allows you to create, attach a file to, send, and view your support tickets.

Create a Support Ticket

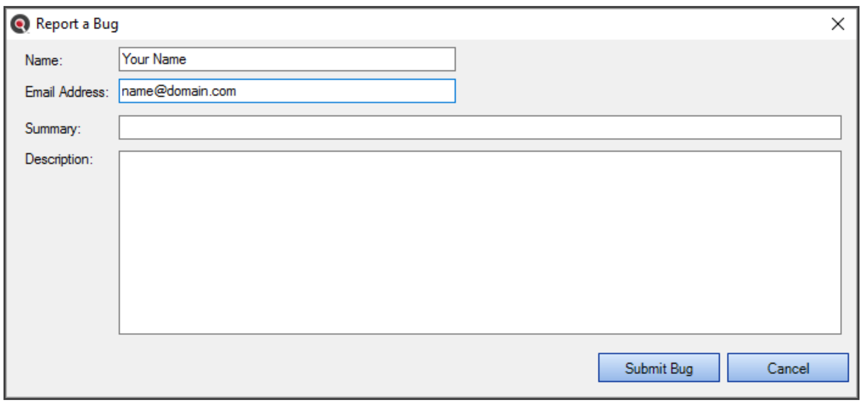
A support ticket is used to report a program bug or to request a new product feature. Submitted crash reports or on-start-up of the program after a crash also create support tickets automatically. Support tickets status along with fix notes are visible to all linked accounts that are registered with 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:

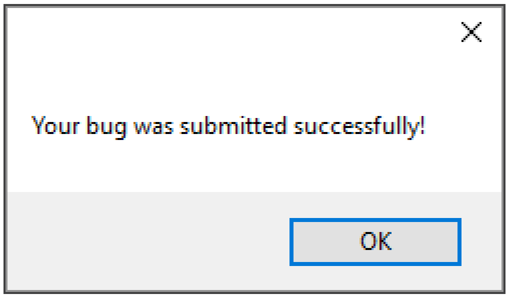


Note: The **Name** and **Email Address** fields will be filled out for you according to the current user. These can be changed, as desired.

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.

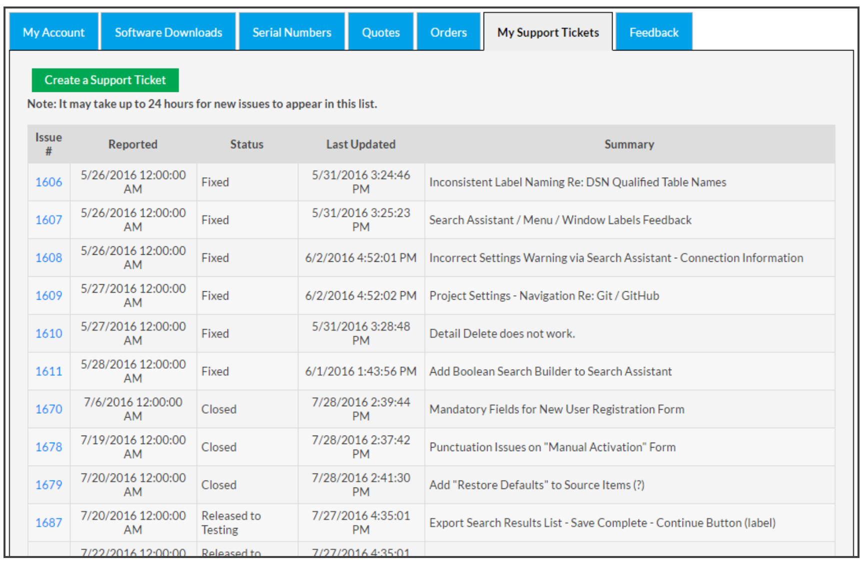
   Tip: To send logs to Find it EZ Support, **See**"Find it EZ Support" on page 228.

3. Click on the **Submit Bug** button. Once submitted, the following notification will appear:



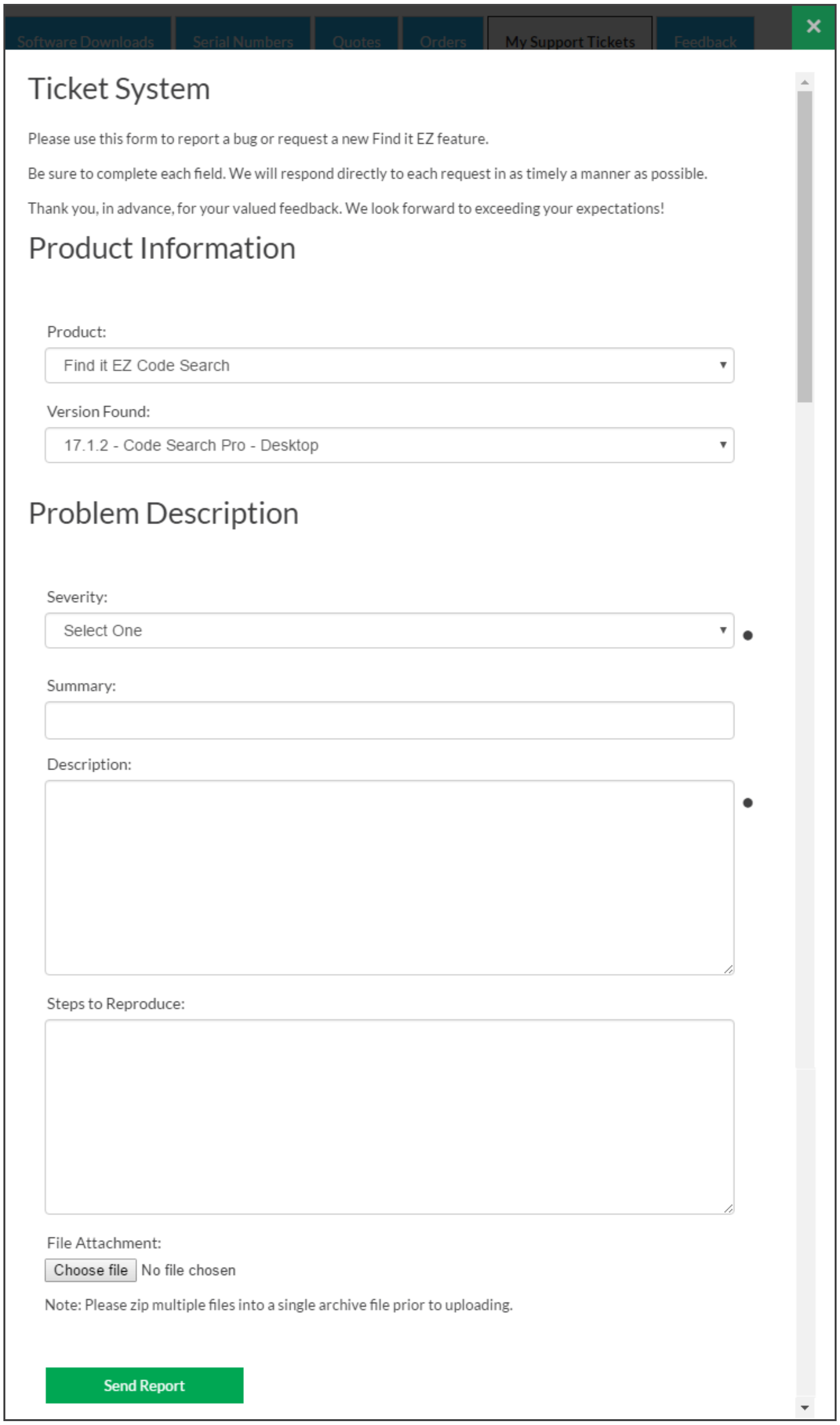
On the website:

1. Log in to your Find it EZ Member Account.
2. Click on the **My Support Tickets** tab.

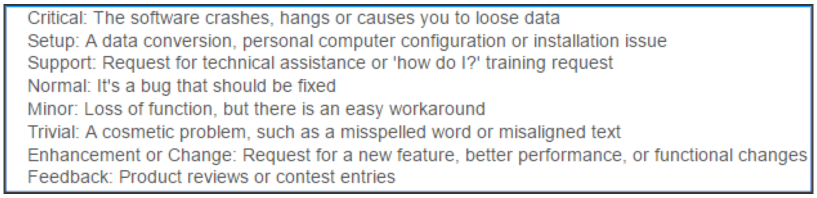


Issue #	Reported	Status	Last Updated	Summary
1606	5/26/2016 12:00:00 AM	Fixed	5/31/2016 3:24:46 PM	Inconsistent Label Naming Re: DSN Qualified Table Names
1607	5/26/2016 12:00:00 AM	Fixed	5/31/2016 3:25:23 PM	Search Assistant / Menu / Window Labels Feedback
1608	5/26/2016 12:00:00 AM	Fixed	6/2/2016 4:52:01 PM	Incorrect Settings Warning via Search Assistant - Connection Information
1609	5/27/2016 12:00:00 AM	Fixed	6/2/2016 4:52:02 PM	Project Settings - Navigation Re: Git / GitHub
1610	5/27/2016 12:00:00 AM	Fixed	5/31/2016 3:28:48 PM	Detail Delete does not work.
1611	5/28/2016 12:00:00 AM	Fixed	6/1/2016 1:43:56 PM	Add Boolean Search Builder to Search Assistant
1670	7/6/2016 12:00:00 AM	Closed	7/28/2016 2:39:44 PM	Mandatory Fields for New User Registration Form
1678	7/19/2016 12:00:00 AM	Closed	7/28/2016 2:37:42 PM	Punctuation Issues on "Manual Activation" Form
1679	7/20/2016 12:00:00 AM	Closed	7/28/2016 2:41:30 PM	Add "Restore Defaults" to Source Items (?)
1687	7/20/2016 12:00:00 AM	Released to Testing	7/27/2016 4:35:01 PM	Export Search Results List - Save Complete - Continue Button (label)

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:



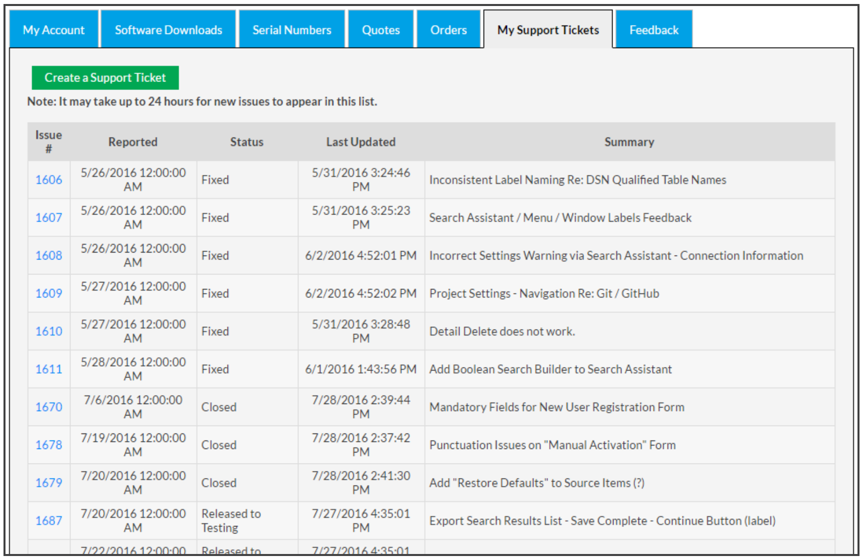
   b. In the **Summary** text box, enter a brief and descriptive summary of the issue or problem.
   c. In the **Description** text box, enter a detailed description of the issue or problem.
   d. In the **Steps to Reproduce** text box, thoroughly describe the steps required to reproduce the issue or problem. 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** datetime, **Status**, **Last Updated** datetime, and **Summary**.



Issue #	Reported	Status	Last Updated	Summary
1606	5/26/2016 12:00:00 AM	Fixed	5/31/2016 3:24:46 PM	Inconsistent Label Naming Re: DSN Qualified Table Names
1607	5/26/2016 12:00:00 AM	Fixed	5/31/2016 3:25:23 PM	Search Assistant / Menu / Window Labels Feedback
1608	5/26/2016 12:00:00 AM	Fixed	6/2/2016 4:52:01 PM	Incorrect Settings Warning via Search Assistant - Connection Information
1609	5/27/2016 12:00:00 AM	Fixed	6/2/2016 4:52:02 PM	Project Settings - Navigation Re: Git / GitHub
1610	5/27/2016 12:00:00 AM	Fixed	5/31/2016 3:28:48 PM	Detail Delete does not work.
1611	5/28/2016 12:00:00 AM	Fixed	6/1/2016 1:43:56 PM	Add Boolean Search Builder to Search Assistant
1670	7/6/2016 12:00:00 AM	Closed	7/28/2016 2:39:44 PM	Mandatory Fields for New User Registration Form
1678	7/19/2016 12:00:00 AM	Closed	7/28/2016 2:37:42 PM	Punctuation Issues on "Manual Activation" Form
1679	7/20/2016 12:00:00 AM	Closed	7/28/2016 2:41:30 PM	Add "Restore Defaults" to Source Items (?)
1687	7/20/2016 12:00:00 AM	Released to Testing	7/27/2016 4:35:01 PM	Export Search Results List - Save Complete - Continue Button (label)
	7/22/2016 12:00:00	Released to	7/27/2016 4:35:01	

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:

Date Found:	2016-12-06
Status:	Open
Last Updated:	2016-12-06 12:33:22
Summary	Local or Network Folders: Clear File Filter when Directory is Removed or Changed
Issue Details	While setting up to perform a compare, I had created a File Filter to limit items. When I later removed the Directory altogether, the File Filter remained, causing no items to index for my subsequent compare. You may want to consider clearing any File Filters that relate to a Directory if they no longer apply. Or, alternatively, throw a message that says, "You have File Filters applied. Do you still want to use them?" or similar.
Notes	

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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