Find it EZ Software Corp.

Dev Surge 365 Enterprise

Version 17.0.5

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Contents

About This Guide

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

If we can improve this reference in any way, please feel free to send us your feedback. See "Send Feedback" on page 176.

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

This guide uses the following document conventions:

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

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

Program buttons are shown like this: **<Cancel->**

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

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
- "Get Started" on page 31

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

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 Crystal Reports, SSRS, Oracle Reports, SQL Server, Oracle, MySQL, MS Access, DB2, Cloud databases SQL Azure and Amazon RDS, Excel 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 productivity software products, software developers benefit from:

- Saving time and money by quickly searching all Crystal 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

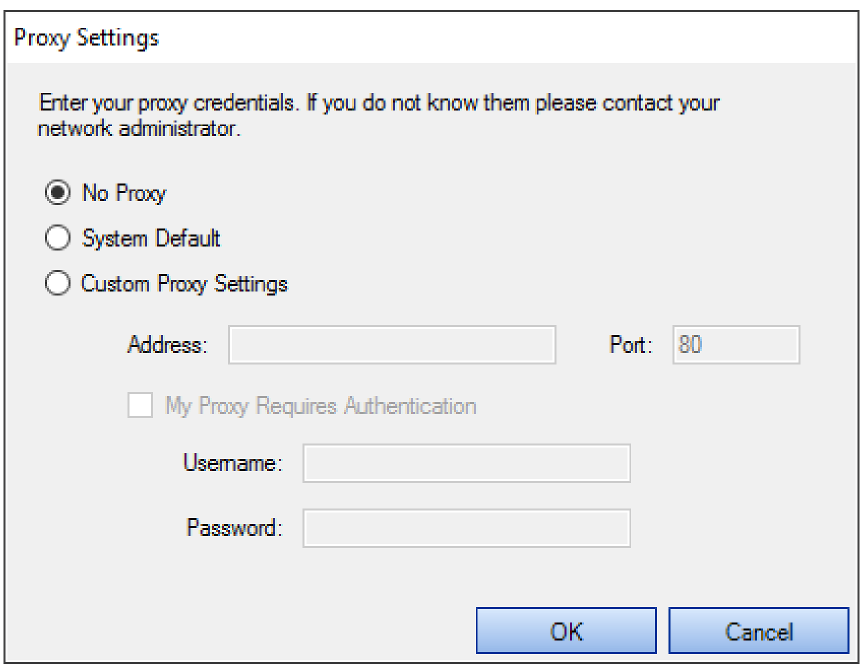
1. Visit **https://www.finditez.com/**.
2. Select the product that you want to download. Refer to the following documents to select the product that best meets your needs:
    a. **https://www.finditez.com/resellers/salesaids/FinditEZ_compare_editions.pdf**
    b. **https://www.finditez.com/resellers/salesaids/Product%20Selection.pdf**
3. Click on the desired product edition tab.
4. Click on the corresponding **Download Now!** button. You will be directed to the member log in area.
5. If you have not done so already, register for a free Find it EZ account. See: "My Account" on page 163.
6. Once logged in, you will be directed to the **Software Downloads** tab.

See Also:

• "Download Release Version" on page 166

View or Edit Proxy Settings

1. From the Find it EZ menu, select **Tools -> Proxy Settings**. The **Proxy Settings** dialog box will appear, as below:



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

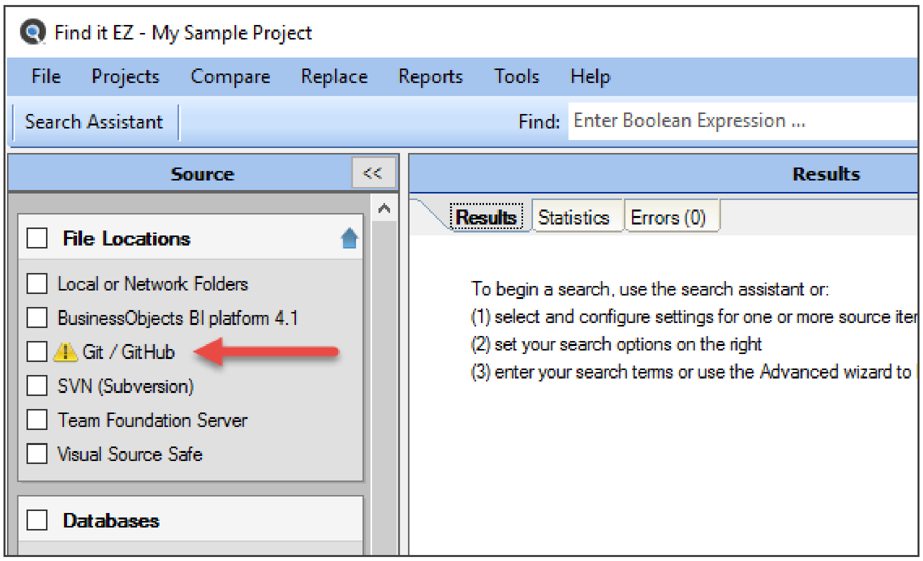
 Note: If you don't know your proxy settings, please contact your Network Administrator.

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

Download Connectors

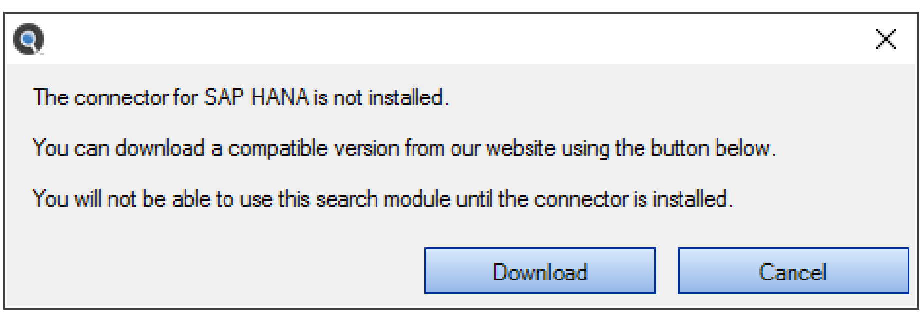
Source items that require a connector will appear with a small warning icon preceding the name. See example below:

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



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

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



From the Program:

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

1. From the Find it EZ menu, select **Tools -> Download Connectors -> [Connector Name]**. A **Download Connector** dialog will appear.
2. Where applicable, click on the **Proxy Settings** button. A **Proxy Settings** dialog will appear.
    a. Enter your proxy credentials for the selected connector.

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

    b. When settings are complete, click on the **OK** button to save.
3. Click on the **Download & Install** button. The connector will begin downloading.
    a. Once downloaded, a Find it EZ **InstallShield Wizard** will appear.
    b. Click on the **Next** button.
    c. Read and follow the instructions provided.
    d. When complete, click on the **Finish** button.

On the Website:

1. Log in to your Find it EZ Member Account. See: "My Account" on page 163
2. Click to select the **Software Downloads** tab. A list of product releases and optional connectors will appear.
3. Locate the product release for which you want to download a connector.
4. In the **Download Optional Connectors** section of the table, click on the corresponding version number in the desired connector name column. A **Connector Details** dialog box will appear.
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), click on the **directly from Microsoft** link or directly from SAP (i.e. Crystal Reports), click on the **directly from SAP** link.
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.

See Also:

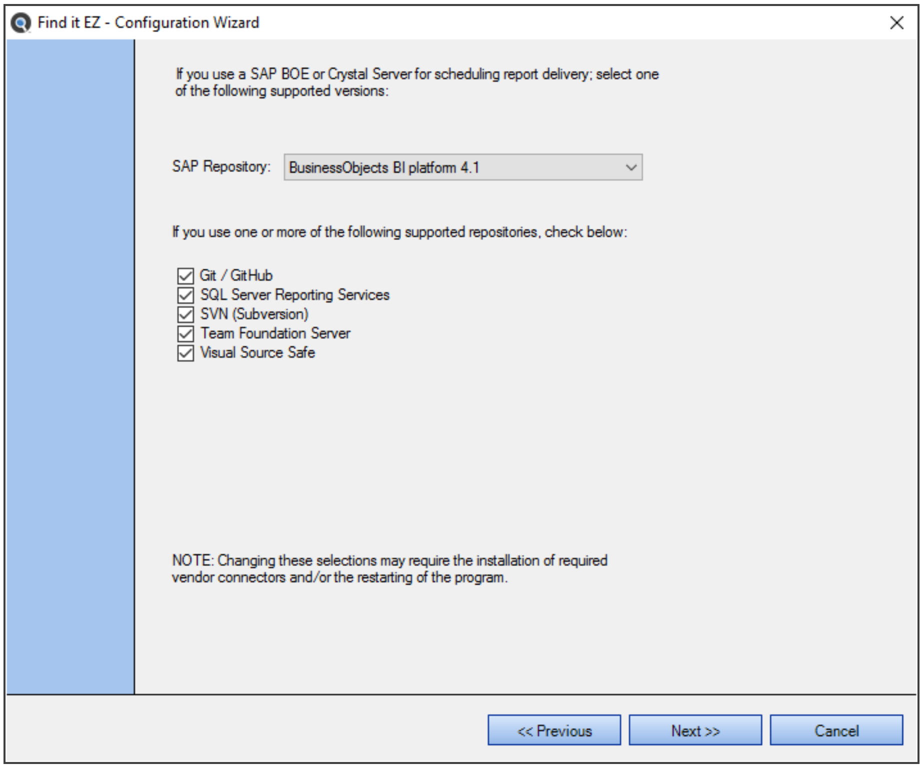
- "SAP Repositories - Compatibility Table" on page 169

Installation and Configuration Wizard

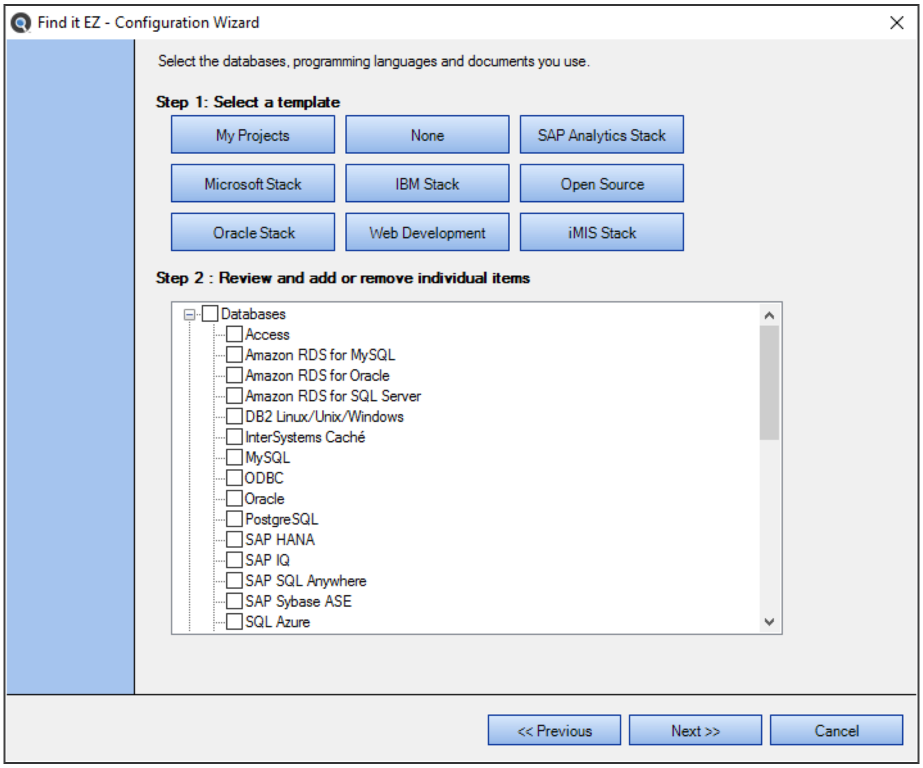
After you download and install Find it EZ and run it for the first time, a **Configuration Wizard** opens to walk you through the initial setup and configuration process.

Click on the **Next >>** button to continue, and follow the instructions.

First Run Configuration Wizard



1. If you use a SAP BOE or Crystal Server for scheduling report delivery, select a version from the **SAP Repository** drop-down list.
2. If you use one or more of the supported repositories, click to check all those that apply.
3. Click on the **Next >** button to continue.



To create and apply a custom template:

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

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

2. Scroll down to view items and click to check or un-check source items, as desired.
3. Click on the **OK** button to save.

To clear all individual items:

1. Click on the **None** template button. All individual source items will be un-checked.
2. Click to check at least one source item.
3. Click on the **OK** button to save.

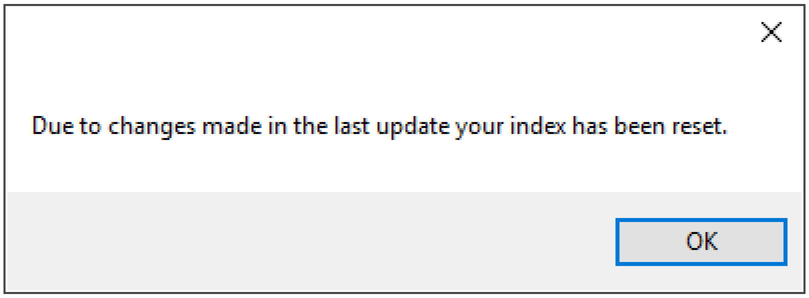
To select, modify, and apply an existing template:

1. Click on the desired template button. Note that applicable items are selected in the list.
2. Scroll down to review the items included in the selected template.
3. Click to check or un-check individual items in the template, as desired.
4. Click on the **OK** button to save.

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

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 Find it EZ" on page 3
- "Configuration Wizard" on page 29

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 does not start (by default), you will receive an "Unable to connect to the license manager..." message preventing the program from running.

Solutions for Pro Desktop and Dev Surge 365 are:

1. Click on the **Yes** button on the message to try restarting the service.
2. Reboot your machine.
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.

See Also:

- "Find it EZ Support" on page 162

Activate License

To activate your license:

1. Once the product is downloaded and installed, launch the program. The **Activate** dialog box will appear.
2. Enter your account **Email Address**, **First/Last Name**, and product **Serial Number**.

3. Click on the **Activate** button. If successful, the program will be activated for use.

 > **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 171
- "Download Find it EZ" on page 3
- "Download Release Version" on page 166
- "Get a New Trial License" on page 171

Activate License Manually

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

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

In cases where no Internet access is allowed even from a web browser, the end user would have to find a workstation (home computer other office computer that is permitted web browsing) from where they can perform the manual activation by sending the long codes back and forth between computers as within an email for example.

> **Note:** Manually activated licenses expire in the lesser of 30 days from now or the original expiry date. Once expired, manual activation will be required again.

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**.
3. Click on the **Manual Activation** button. The **Manual Activation** dialog box will appear.
4. Follow the instructions in Step 2); copy and paste the information in the box provided by clicking on the **Copy to Clipboard** button. Alternatively, download the manual activation request as a file by clicking on the **Save to File** button.
5. In Step 1), click on the **Open Website** button.
    a. Log in to the member website.
    b. Click on the **Serial Numbers** tab.
    c. Click on the **Manual Activation** button. The **Manual Activation** dialog box will appear.
    d. Paste your manual activation code in the box provided. Or, click on the **Choose File** button to load it from a file (if you saved it in step 4 above).
    e. Click on the **Next** button. A response file will be generated.
    f. Copy the provided code or click on the **Download** button to download the response file.
    g. Return to the Find it EZ program.

6. Paste the response from our website into the Step 3) box provided by clicking on the **Paste from Clipboard** button. Or, click on the **Load from File** button to load the savedresponse file.
7. Once complete, click on the **Activate** button. The program will be activated for use.

Product Trials and Limits

Product trails are subject to the following limitations:

- Time limited
- Feature (# of documents) 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 cannot create any additional projects; just the single "Default" project is allowed. This is required to manage the # of documents (per project) trial limitation, see below.
- 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.

Per project limits in trial mode:

	Database	Reports	Source Code	Documents
Code Search Pro Desktop	250	50	150	25
Code Search Pro Server	500	100	300	50
Dev Surge 365 Enterprise*	500	100	300	50

*multiply by 2 for total document limits as up to 2 projects are permitted.

Also note that in fully unlocked mode, Dev Surge 365 allows unlimited documents, while the Code Search Pro editions have limits (per project) but an unlimited number of projects in all product editions are possible. This simply makes it less convenient to use the Code Search Pro edition if you have more documents to manage than is permitted per project as you have to filter the project documents and repeat each search (by project) rather than using Dev Surge 365 that can do it all in a single pass (unlimited documents per project):

Per project limits in fully unlocked mode (all products allow unlimited # of projects):

	Database	Reports	Source Code	Documents
Code Search Pro Desktop	5000	1000	3000	500
Code Search Pro Server	5000	1000	3000	500
Dev Surge 365 Enterprise*	unlimited	unlimited	unlimited	unlimited

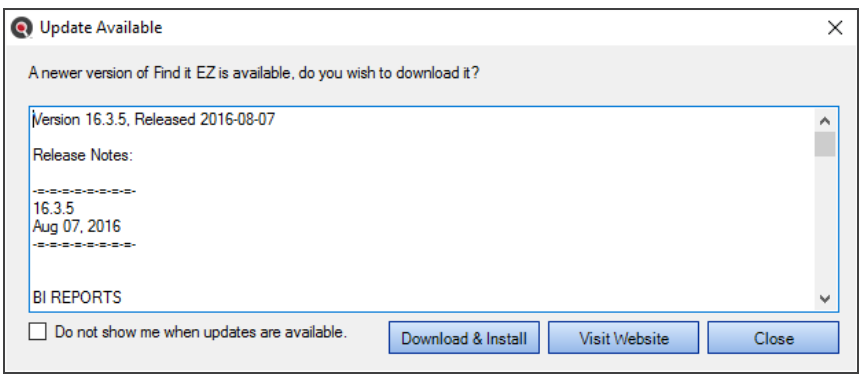
The product trial time limits are:

- Code Search Pro Desktop: 15 days
- Code Search Pro Server: 30 days
- Dev Surge 365 Enterprise: 30 days

Check for Updates

From the Program:

1. From the Find it EZ menu, select **Help -> Check for Updates**.
2. If not updates are available, you will receive a message that reads "No updates available at this time." To close this message, click on the **OK** button.
3. If updates are available, an **Update Available** pop-up will appear as in the example below:



4. Use the vertical scroll bar to view all release notes.
5. To access your Find it EZ account, click on the **Visit Website** button. Your account will open to the **Software Downloads** tab.
6. To download and install the update, click on the **Download & Install** button. A **Download Update** pop-up will appear.
   a. To enter proxy settings, click on the **Proxy Settings** button.
   b. To download and install the update, click on the **Download & Install** button. The download will begin.
      i. Once completed, the **InstallShield Wizard** will appear to walk you through the installation process.
      ii. Follow the screen instructions and click on the **Next** button to proceed through the steps.

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.

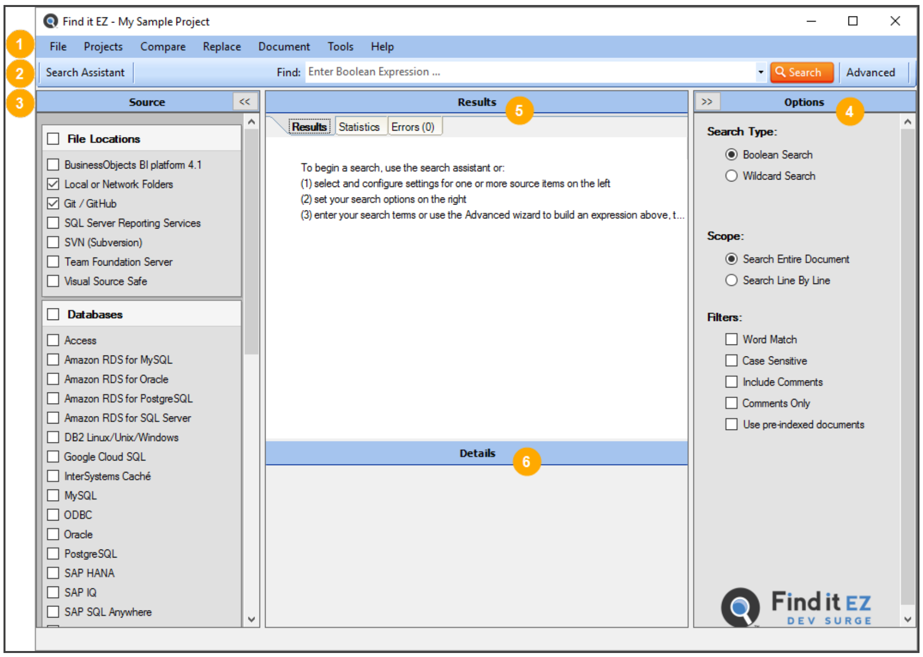
Note: If your support plan has lapsed or you have not yet decided, you may request a free trial key to see what's new.

Product Overview

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

User Interface Layout

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



#	Name	Description
1	Menu	Click on a menu item to view and navigate projects and settings, initiate a task, export or print results, access user options, reports, help, and more.
2	Search	Quickly initiate a search using the "Search Wizard" on page 31. Or, "Perform a Regular Search" on page 60, or "Use the Expression Builder" on page 65.
3	Source	This panel allows you to select and configure settings for the source files (File Locations, Databases, Report Utilities, Programming Languages, 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.

#	Name	Description
4	Options	Show or hide the panel by using the << and >> buttons. Click to choose a **Search Type** or **Scope** option and click to check the desired **Filters** to apply to the search.
5	Results	Once a search is complete, results can be viewed or edited via this window. Select a tab to view **Results**, **Statistics**, and **Errors**. See "Work With Search Results" on page 97 for details.
6	Details	When a result is selected in the **Results** window, details will appear in this window. See "View Search Result Details" on page 101 for more information.

Navigation

Search navigation in Find it EZ is accomplished in two main ways:

1. By using the **Search Wizard** (for new users).

   > **Note:** Many of the items included in the **Search Wizard** can also be accessed via the menu. Refer to the table below.

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

Search Navigation

#	Search Wizard Option	Menu Navigation
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:** "Perform a Regular Search" on page 60.
2	Compare database schema, reports or files for differences between versions	**Compare -> Documents, Reports & Databases**
3	Extract database objects (tables, stored procedures, views, etc.) used in my reports	**Document -> Business Intelligence -> SQL Code Extract**
4	Generate detailed content documentation for my reports	**Document -> Business Intelligence -> Report Definition**
5	Extract all SQL code used in my reports	**Document -> Business Intelligence -> Show SQL Queries**
6	Create a database cross-reference for my reports	**Document -> Business Intelligence -> Database Cross-Reference**
7	List all my reports, including printer and update information	**Document -> Business Intelligence -> Report Listing**
8	List the schedule for my reports inside an SAP BOE or Crystal Server repository	**Document -> SAP BOE / Crystal Server -> Report Schedules**
9	List the security for my reports inside an SAP BOE or Crystal Server repository	**Document -> SAP BOE / Crystal Server -> Security Listing**

#	Search Wizard Option	Menu Navigation
10	List the schedule for my reports inside a SQL Server Reporting Services (SSRS) database	**Document -> SQL Reporting Services -> Report Schedules**
11	Replace Crystal Report data source connections or qualified table names	**Replace -> Crystal Reports -> Data source connections or qualified table names**
12	Replace the username, password, server or database of my Reports in an SAP BOE or Crystal Server repository	**Replace -> Crystal Reports -> BOE BI Database logon information**

See Also:

- "Launch the Wizards" on page 31
-
- "Use the Expression Builder" on page 65

Customize View

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

- To show or hide the **Source** or **Options** panels, see "Product Overview" on page 12
- To expand or collapse **Source** items, see "Product Overview" on page 12
- To add or remove **Source** items, see "Set Source Items" on page 24
- To add or remove repositories, see "Set File Locations (Repositories)" on page 27
- To show or hide **Project Settings** each time you select a scan source item, see "Search Locations and Source Settings" on page 75
- To configure source category and source item viewer/editor, see "Viewer / Editor Settings" on page 28
- To customize **Results** list columns, see "Show or Hide Result List Columns" on page 24
- To show the **Search Wizard** on start-up, see "Show Wizards on Start-up" on page 34

See Also:

- "Set User Options" on page 21

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:
   - "Search Wizard" on page 31
   - "Perform a Regular Search" on page 60
   - "Use the Expression Builder" on page 65
2. From the Find it EZ menu, select **File -> Save**. A **Save Search Results** dialog box will appear.

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

   Alert: Database table data search results will not be saved.

4. 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**. An **Open Search Results** dialog box will appear.
2. 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.

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

See Also:

- "Add or Edit Annotations" on page 105
- "Mark Item(s) Complete or Incomplete" on page 104

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 10

Export Results

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

Export Search Results

1. Perform a search:

   - "Search Wizard" on page 31
   - "Perform a Regular Search" on page 60
   - "Use the Expression Builder" on page 65

2. From the Find it EZ menu, select **File -> Export -> Search Results List**. A **Select the items to include** pop-up will appear.

   a. Click to choose one of the options; **All results**, **Currently displayed results**, or **Checked results only**.
   b. Click on the **Next** button. A **Save As** dialog box will appear.
      i. Navigate to the destination folder.
      ii. Enter the desired **File name**.
      iii. Click on the **Save** button.
   c. A **Save Complete** pop-up will appear.
      i. To view the saved file, click on the **View Now** button. The file will open in the selected viewer (see below).

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

      ii. To close the **Save Complete** pop-up, click on the **Close** button.
3. Exported search results will contain the following data columns:
   - Source **Location**
   - File **Type**
   - **Host** Name
   - **File Path or Database**
   - **Document** Name
   - Number of **Matches**
   - **Annotations**

Export Search Result Details

1. Perform a search:
   - See: "Search Wizard" on page 31
   - "Perform a Regular Search" on page 60
   - "Use the Expression Builder" on page 65
2. To export selected details only:
   a. In the **Results** window, click on a result row. Details will appear in the **Details** window.
3. From the Find it EZ menu, select **File -> Export -> Search Results Detail**. A **Select the items to include** pop-up will appear.
   a. Click to choose one of the options; **All results**, **Currently displayed results**, or **Checked results only**.
   b. Click on the **Next** button. A **Save As** dialog box will appear.
      i. Navigate to the destination folder.
      ii. Enter the desired **File name**.
      iii. Click on the **Save** button.
   c. A **Save Complete** pop-up will appear.
      i. To view the saved file, click on the **View Now** button. The file will open in the selected viewer (see below).

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

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

1. Perform a search:
    - See: "Search Wizard" on page 31
    - "Perform a Regular Search" on page 60
    - "Use the Expression Builder" on page 65
2. From the Find it EZ menu, select **File -> Export -> MS Project Tasks**. A **Select the items to include** pop-up will appear.
    a. Click to choose one of the options; **All results**, **Currently displayed results**, or **Checked results only**.
    b. Click on the **Next** button. A **Save As** dialog box will appear.
        i. Navigate to the destination folder.
        ii. Enter the desired **File name**.
        iii. Click on the **Save** button.
    c. A **Save Complete** pop-up will appear.
        i. To view the saved file, click on the **View Now** button. The file will open in the selected viewer (see below).

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

        ii. To close the **Save Complete** pop-up, click on the **Close** button.
3. 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. See "Export MS Project Tasks" above.
2. Open Microsoft Project.
3. From the **File** menu, select **New**.
4. On the **New** page, click **New from Excel workbook**.
5. In the **Open** box, click the arrow next to **XML Format**, and pick **Excel Workbook**.
6. Locate and select the workbook you want to import, and click **Open**.
7. In the **Import Wizard**, click **Next** to get started, and follow the steps to complete the import.

Export Error List

1. Perform a search:
    - See: "Search Wizard" on page 31
    - "Perform a Regular Search" on page 60
    - "Use the Expression Builder" on page 65
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**. 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.
4. A **Save Complete** pop-up will appear.
    a. To view the saved file, click on the **View Now** button. The file will open in the selected viewer (see below).

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

    b. To close the **Save Complete** pop-up, click on the **Close** button.
5. The exported error list will contain the following data columns:
    - **Location**
    - **Type**
    - **Host**
    - **File Path or Database**
    - **Document**
    - **Error**
    - **Details**

See Also:

- "Work With Search Results" on page 97
- "Viewer / Editor Settings" on page 28
- "Set User Options" on page 1

Print Results

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

Print Search Results

1. Perform a search:
    - "Search Wizard" on page 31
    - "Perform a Regular Search" on page 60
    - "Use the Expression Builder" on page 65
2. From the Find it EZ menu, select **File -> Print -> Search Results List**. A **Select the items to include** pop-up will appear.

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

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

3. Select the **Destination** and configure print settings, as desired.
4. Click on the **Print** button. The report will be sent to the selected destination printer or file.
5. The generated report will contain the following data:

   Header:

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

   Columns:

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

Print Search Result Details

1. Perform a search:
   - "Search Wizard" on page 31
   - "Perform a Regular Search" on page 60
   - "Use the Expression Builder" on page 65
2. From the Find it EZ menu, select **File -> Print -> Search Results Detail**. A **Select the items to include** pop-up will appear.

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

   b. Click on the **Next** button. A report containing the selected results will open in a new browser window and a browser **Print** dialog will be launched.
3. Select the **Destination** and configure print settings, as desired.
4. Click on the **Print** button. The report will be sent to the selected destination printer or file.
5. The generated report will contain the following data:

   Report header:

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

   Header for each match found:

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

See Also:

- "Work With Search Results" on page 97

Exit Find it EZ

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

   OR

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

See Also:

- "Save Project Settings" on page 15

Basic Settings and Customization

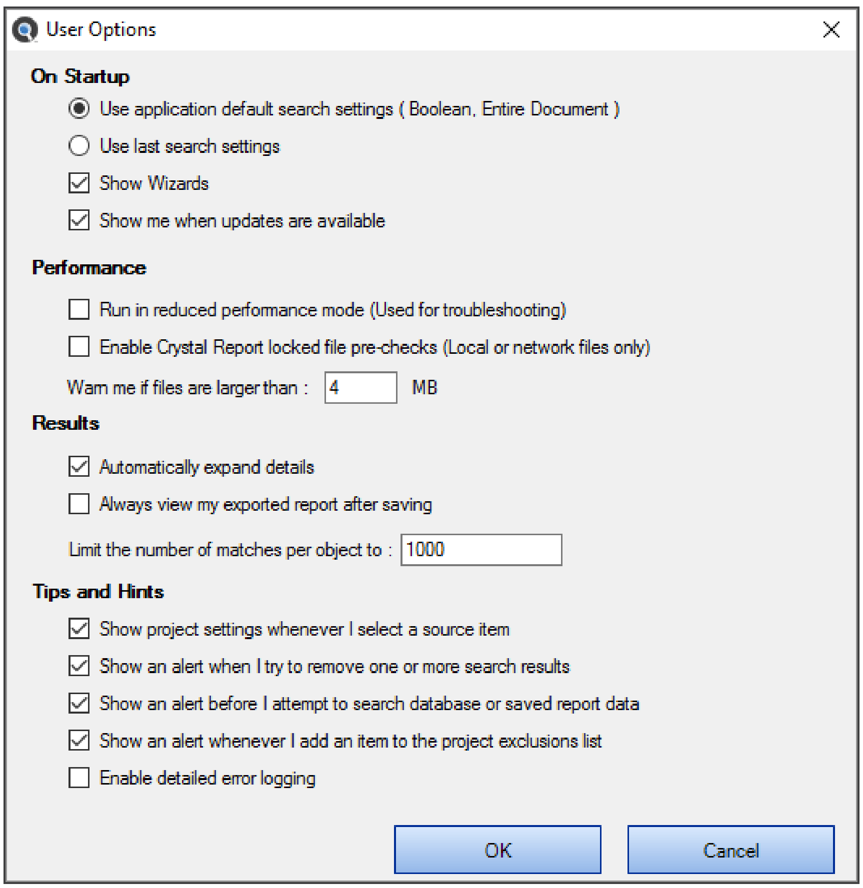
This section describes the steps required to set user options, preferences, and settings for Find it EZ.

See Also:

- "Customize View" on page 14

Set User Options

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



2. 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, **Scope** = Search Entire Document) for the next 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.
Run in reduced performance mode (Used for troubleshooting)	This option can be used if/when you have limited memory (RAM) on your computer and Find it EZ is freezing, crashing, logging .net memory issues, or taking a VERY long time to complete a search. The Find it EZ program will process the maximum number of documents simultaneously using threads. By dropping this to reduced performance mode, only a single document is processed at a time, reducing stress on a system with a limited amount of RAM. Default = Off (for optimal performance).
Enable Crystal Report locked file pre-checks (Local or network files only)	Allows the Crystal Reports scanner to detect locked files during indexing and, if a file is currently open or locked, to make a temporary copy of the file before allowing Crystal Reports to open it. Note that this feature is disabled by default as it can affect performance.
Warn me if files are larger than: ___ MB	When processing many documents in a folder & sub-folders (especially "text" type documents), this option will allow you to skip individual large documents during the search process that are found in a source folder; like error logs, etc. that may be in a file directory but do not need to be searched (as they will either return too many false positives OR will slow down processing unnecessarily). This gives you an opportunity at search run time to skip certain very large files you may not have wanted to be scanned but were in the folder and had a file type you do want to search other (smaller) documents for matches. You can change this setting to customize for your environment. Default = 4 MB.
Automatically expand details	Click to check this item to expand selected result details in the **Details** window when a result is selected in the **Results** window. If un-checked, details will appear collapsed. Click on the "+" to expand.

User Option	Description
Always view my exported report after saving	Click to check this item if you want exported reports to open immediately after saving. **See Also:** "Viewer / Editor Settings" on page 28.
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**.
Show an alert before I attempt to search database data	Everytime you are about to run a search that includes database table data, when this option is checked, an alert is displayed. This warns you that the search time may be long, depending on the size of the table. Find it EZ searches for matches in every column (field) of every row in the table. For a table with a significant number of text columns and rows, this can really affect the search performance and run time. Find it EZ allows for searching database table data, but this is intended for small "system" tables that are used in a dynamic table-driven software system. Such tables contain references to screen names, report labels, or even code to perform actions. This is also why we have the user explicitly choose a small subset of tables and do not offer a "search all tables" option. Basically, this reminds the user they are about to search data and gives them the option to cancel the search / disable data searching before proceeding. At a minimum, it lets them know why the search is taking awhile. Default = On (to warn the user everytime they are about to search table data). Note also that database table data searching is "disabled" by default.

User Option	Description
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.

3. Click on the **OK** button to save your settings. The **User Options** dialog box will close.
4. To discard any changes, click on the **Cancel** button.

Show or Hide Result List Columns

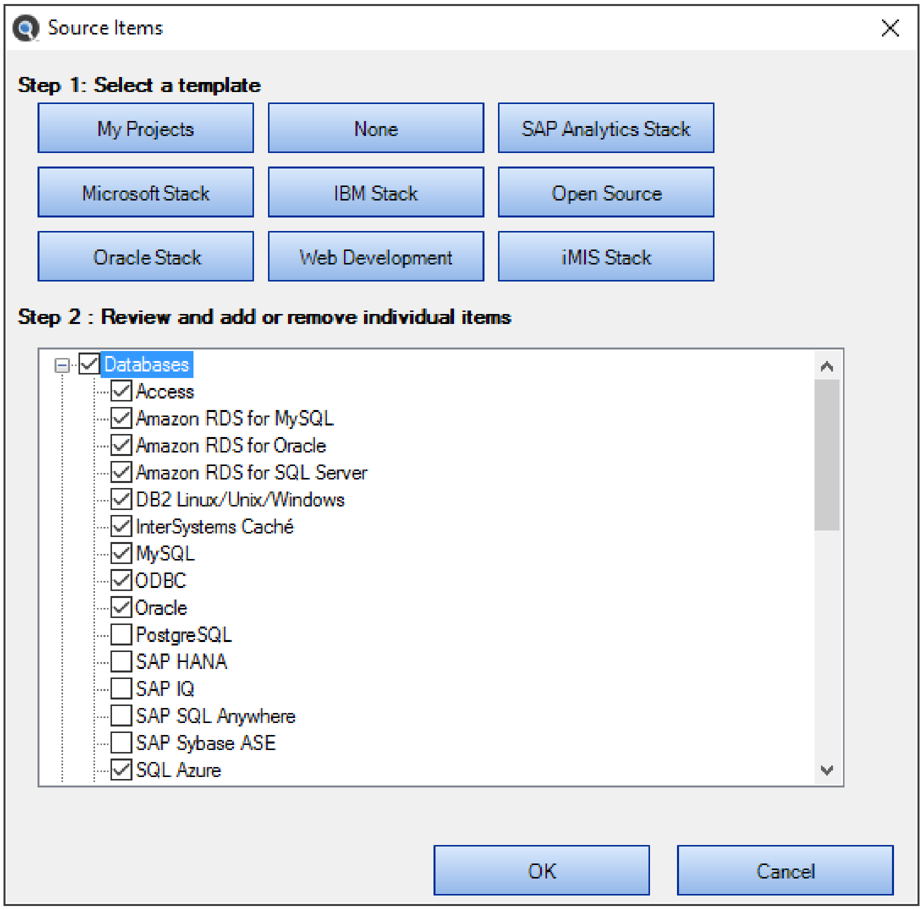
Note: There must be results listed in the **Results** window in order for the following menu option to be enabled for use. Column names shown in grey cannot be hidden.

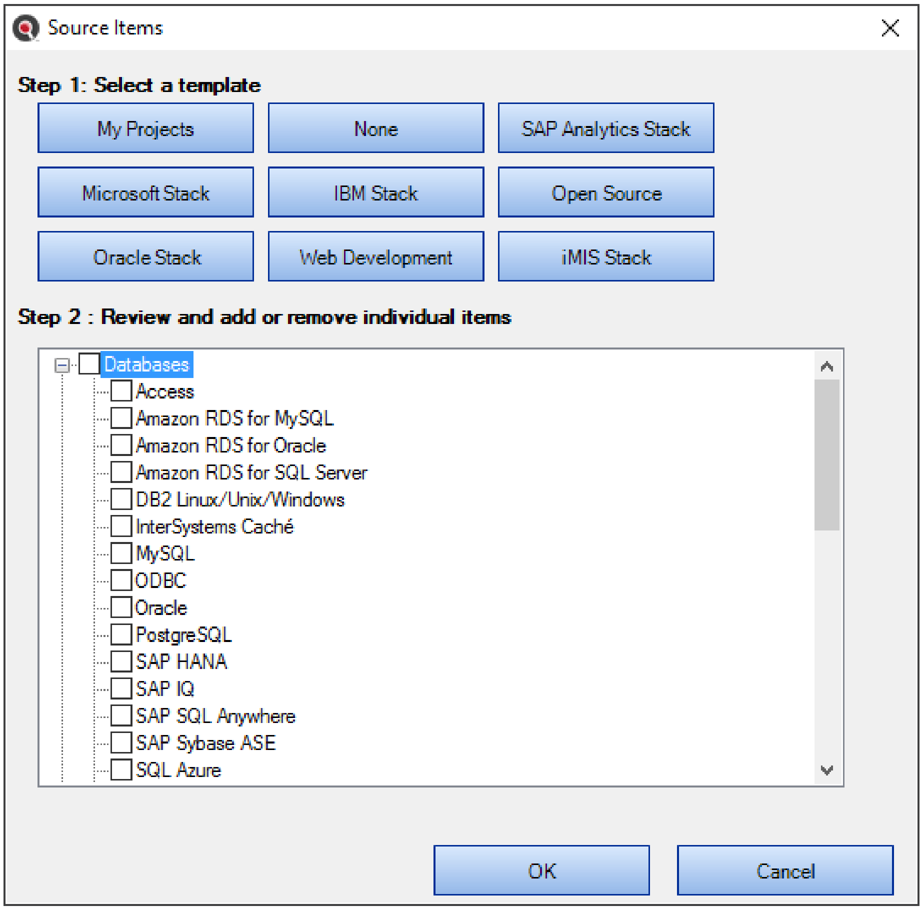
1. From the Find it EZ menu, select **Tools -> Customize -> Result List Columns**. A list of column names will appear.
2. Click to show or hide columns, as desired. See note above.

Set Source Items

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

From the Find it EZ menu, select **Tools -> Customize -> Source Items**. The **Source Items** dialog box will appear, as below:


Source Items
Step 1: Select a template
My Projects
None
SAP Analytics Stack
Microsoft Stack
IBM Stack
Open Source
Oracle Stack
Web Development
iMIS Stack
Step 2 : Review and add or remove individual items
Databases
Access
Amazon RDS for MySQL
Amazon RDS for Oracle
Amazon RDS for SQL Server
DB2 Linux/Unix/Windows
InterSystems Caché
MySQL
ODBC
Oracle
PostgreSQL
SAP HANA
SAP IQ
SAP SQL Anywhere
SAP Sybase ASE
SQL Azure
OK
Cancel



Note: Collapse (i.e. "-" buttons for each source category) are intentionally disabled so that any individual checked source items are always visible.

To create and apply a custom template:

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

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

2. Scroll down to view items and click to check or un-check source items, as desired.
3. Click on the **OK** button to save.

To clear all individual items:

1. Click on the **None** template button. All individual source items will be un-checked.
2. Click to check at least one source item.
3. Click on the **OK** button to save.

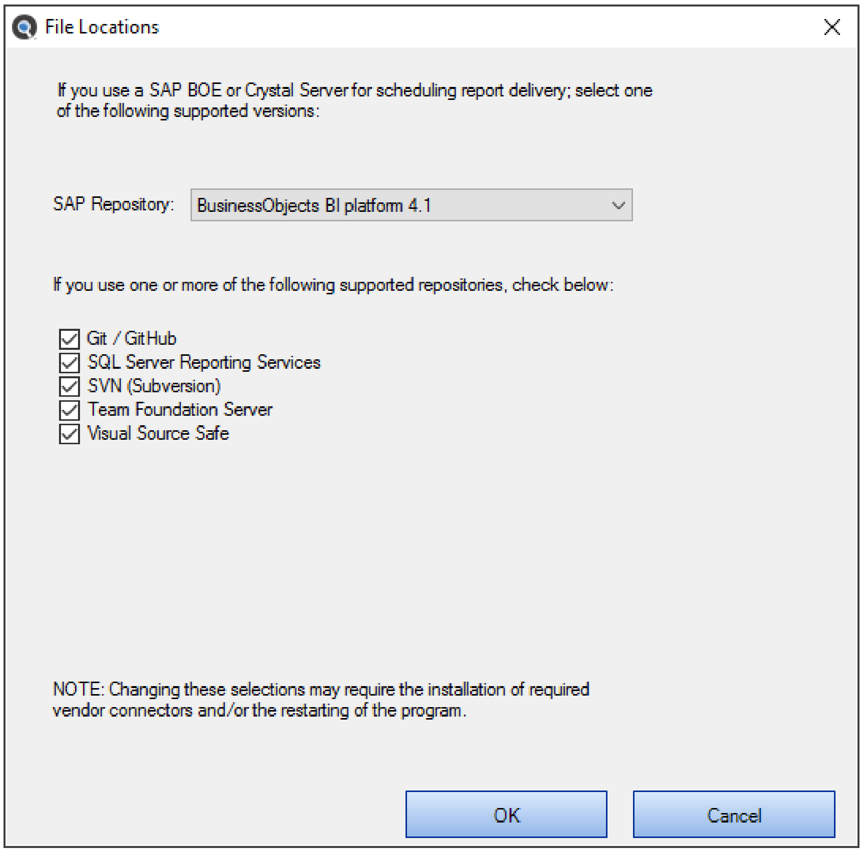
To select, modify, and apply an existing template:

1. Click on the desired template button. Note that applicable items are selected in the list.
2. Scroll down to review the items included in the selected template.
3. Click to check or un-check individual items in the template, as desired.
4. Click on the **OK** button to save.

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

Set File Locations (Repositories)

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



2. If you use a SAP BOE or Crystal Server for scheduling report delivery, select a version from the **SAP Repository** drop-down list.
3. If you use one or more of the supported repositories, click to check all those that apply.

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

4. Click on the **OK** button to save and close.
5. To discard any changes, click on the **Cancel** button.

See Also:

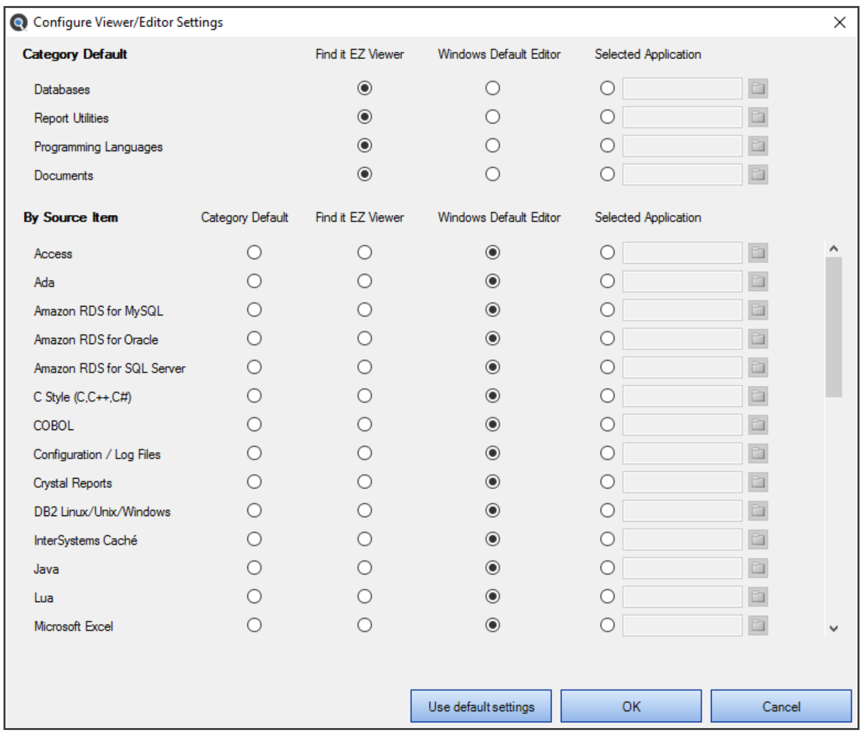
- "Download Connectors" on page 167

Viewer / Editor Settings

These settings allow you to select the viewer / editor with which a source category or item opens.

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

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



2. In the **Category Default** section:
   a. For each category, choose one of the following viewer/editor options:
      - **Find it EZ Viewer**
      - **Windows Default Editor**
      - **Selected Application**
   b. IF **Selected Application** is chosen:
      i. Click on the corresponding folder icon. An **Open** dialog box will appear.
      ii. Navigate to the program application you want to use to open this type of file.
      iii. Click on the **Open** button.

OR,

3. In the **By Source Item** section:
   a. For each source item, choose one of the following viewer/editor options:
      - **Category Default**
      - **Find it EZ Viewer**
      - **Windows Default Editor**
      - **Selected Application**
   b. If **Selected Application** is chosen:
      i. Click on the corresponding folder icon. An **Open** dialog box will appear.
      ii. Navigate to the program application you want to use to open this type of file.
      iii. Click on the **Open** button.
4. To set all source items to use the **Category Default** viewer/editor settings, click on the **Use default settings** button.
5. To save any changes and close the **Configure Viewer/Editor Settings** dialog box, click on the **OK** button.
6. To discard changes and keep it open, click on the **Cancel** button.

Configuration Wizard

The **Configuration Wizard** walks you through the steps required to set up your Find it EZ program so that it best meets your business needs.

1. From the Find it EZ menu, select **Tools -> Configuration Wizard**. The **Configuration Wizard** will appear.
2. Click on the **Next >>** button to continue through the steps (click on the **<<Previous** button to go back).
3. Once complete, click on the **OK** button to save all changes and close the **Configuration Wizard**.
4. To discard all changes, click on the **Cancel** button.

See Also:

- "Viewer / Editor Settings" on the previous page

Clear Search History

To clear the search history:

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

See Also:

- "View Recent Search History" on page 1

Index Management

This section provides instructions to clear your index, to compact or shrink your database, and to view your index summary report.

Clear Index or Subset

Alert: When clearing the index or a subset, saved search results are also deleted. If any of the selected items about to be removed from the index are included in either the session (search) history or any previously saved search results, a warning / alert will appear indicating that search results will be affected/lost if you proceed. The session search history selections will remain, but will no longer contain the subset of documents that were removed from the underlying index. **See:**"View Search Result History" on page 97.

1. From the Find it EZ menu, select **Tools -> Index Management**. The **Index Maintenance** dialog box will appear.
2. To clear the entire index:
   a. Click to choose the **Clear the entire index** option.
   b. Click on the **Apply** button.

   OR
3. 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.

Compact and Shrink Database

In most cases the index will be 1GB or under, though it depends on what is being indexed. The current size of your database is shown at the bottom of the **Index Maintenance** dialog box (see instructions below). 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 15000 documents at one point and only have 200 now, you could reclaim a lot of space.

1. From the Find it EZ menu, select **Tools -> Index Management**. The **Index Maintenance** dialog box will appear.
2. Click to choose the **Compact and Shrink the Database** option.
3. Click on the **Apply** button.

View Index Summary Report

1. From the Find it EZ menu, select **Tools -> Index Management**. The **Index Maintenance** dialog box will appear.
2. 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.
3. The report will include the following data:
   - **Location**
   - **Type**
   - **Host**
   - **File Path or Database**
   - **Document**
   - **Sections**
   - **Words**

See Also:

- "Viewer / Editor Settings" on page 28

Get Started

This section provides step-by-step procedures required to use the various Find it EZ 'wizards' to walk you through targeted application 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).

Use Find it EZ Wizards

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 **Search Wizard** and the following Find it EZ wizards:

- Search Wizard
- Compare Wizard
- Document Wizard
- Replace Wizard
- Configuration Wizard

Search Wizard

This section describes how to launch the **Search Wizard**, understand the purpose of each unique option, and to set it to show (or not) on application start-up.

Launch the Wizards

The **Search Wizard** walks you through the steps required to set up and run a search. If the **Show on Start-up** option is selected, the **Search Wizard** 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 **Search Wizard** does not open automatically, follow these steps:

1. Click on the **Wizards** button. The **Wizards**dialog box will appear.

   See: "Wizards Options" on the next page for a description of each option.

   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.

      See:"Projects" on page 73.

   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.

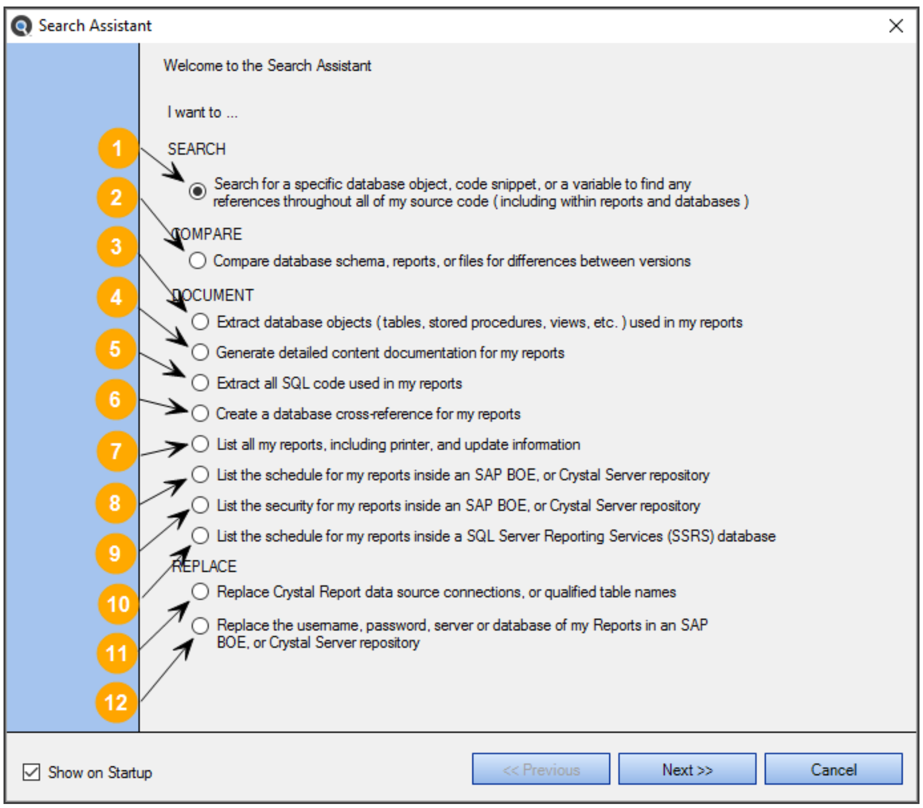
4. Select the desired search locations:
   a. Click to check any **File Repositories** you want to search.
   b. Click to check any **Databases** you want to search.
   c. Click on the **Next** button to continue.
5. Enter connection information for each repository or database.

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

   a. Click on the **Test Connection** button to verify your connection.
   b. Click on the **Next** button to continue.
6. Enter your search criteria:
   a. Enter a search term into the **Find** text box.
   b. Click on the **Start Search** button. A search dialog box will appear showing the status of the search.
7. Once the search is complete, results will appear in the **Results** window.

Wizards Options

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



#	Wizard	Menu Shortcut	Use Case / Document Produced
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:**"Perform a Regular Search" on page 60.	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.
2	Compare database schema, reports, or files for differences between versions	**Compare -> Documents, Reports & Databases**	Mass compare release branches for differences in versions of your code files, reports or database schema and SQL code objects (procedures, triggers, views, functions). Drill down with detailed "diff" tool to view highlighted side-by-side target and source file differences pinpointing exactly what has changed. Export results to Excel lists or scrollable, highlighted HTML.
3	Extract database objects (tables, stored procedures, views, etc.) used in my reports	**Document -> Business Intelligence -> SQL Code Extract**	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.
4	Generate detailed content documentation for my reports	**Document -> Business Intelligence -> Report Definition**	Automatically generate detailed report documentation for your entire report library in a consistent layout and format. Complete report specifications in a standard format are exported in your choice of HTML or TXT format. Create a single file for each report processed, or export all results into file with page-breaks for each report.
5	Extract all SQL code used in my reports	**Document -> Business Intelligence -> Show SQL Queries**	Extract all SQL statements embedded within your reports, including run-time derived SQL commands and table joins from a visual drag-and-drop designer. Export documentation to your choice of HTML or TXT format. Create a single file for each report processed, or export all results into file with page-breaks for each report.
6	Create a database cross-reference for my reports	**Document -> Business Intelligence -> Database 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.
7	List all my reports, including printer and update information	**Document -> Business Intelligence -> Report Listing**	Create a real-time list of all of your reports, including author information, last updated, where located, etc. Results are exported to Excel with customizable column selections.

#	Wizard	Menu Shortcut	Use Case / Document Produced
8	List the schedule for my reports inside an SAP BOE or Crystal Server Repository	**Document -> SAP BOE / Crystal Server -> Report Schedules**	Create a real-time list of all Crystal Report schedules within your SQL Server Reporting Services database, including deliver to, output format, schedule frequency, data or event triggers, report parameters and more. Results are exported to Excel with customizable column selections.
9	List the security for my reports inside an SAP BOE or Crystal Server Repository	**Document -> SAP BOE / Crystal Server -> Security Listing**	Create a real-time list of Crystal Report security access for all schedules and reports located within your SAP BOE or Crystal Server. Results are exported to Excel with customizable column selections.
10	List the schedule for my reports inside a SQL Server Reporting Services (SSRS) database	**Document -> SQL Reporting Services -> Report Schedules**	
11	Replace Crystal Report data source connections or qualified table names	**Replace -> Crystal Reports -> Data source connections or qualified table names**	Mass change the data source connections for a set of Crystal Reports. This is useful whenever you are migrating reports between development->test->production host environments, a database is moved to a new server, a database name has changed, the database type has changed or you want to change the data source connection type (for example you want to switch from ODBC to OLE DB connection or vice-versa). Output can over-write the original source files or be written to a new target folder (recommended).
12	Replace the username, password, server or database of my Reports in an SAP BOE or Crystal Server repository	**Replace -> Crystal Reports -> BOE BI Database logon information**	Mass change Crystal Report database login (authorization) information on a set of schedules within an SAP BOE or Crystal Server. Useful to change a large set of schedules rather then having to change each report schedule individually through the Crystal Management Console. Output can over-write the original source files or be written to a new target folder within the repository (recommended).

Show Wizards on Start-up

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

See Also:

- **Use Pre-Indexed Documents**[1]
- "Apply File Filter" on page 77
- "Use the Expression Builder" on page 65
- "Work With Search Results" on page 97

[1]This feature saves time if your repository does not change often. When checked, the search won't look for changes.

- "Search Within Result Documents" on page 101
- "Set User Options" on page 1

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 search location(s), enter connection information, enter search criteria and start the search, and enter connection information and update reports.

Launch the Search Wizard

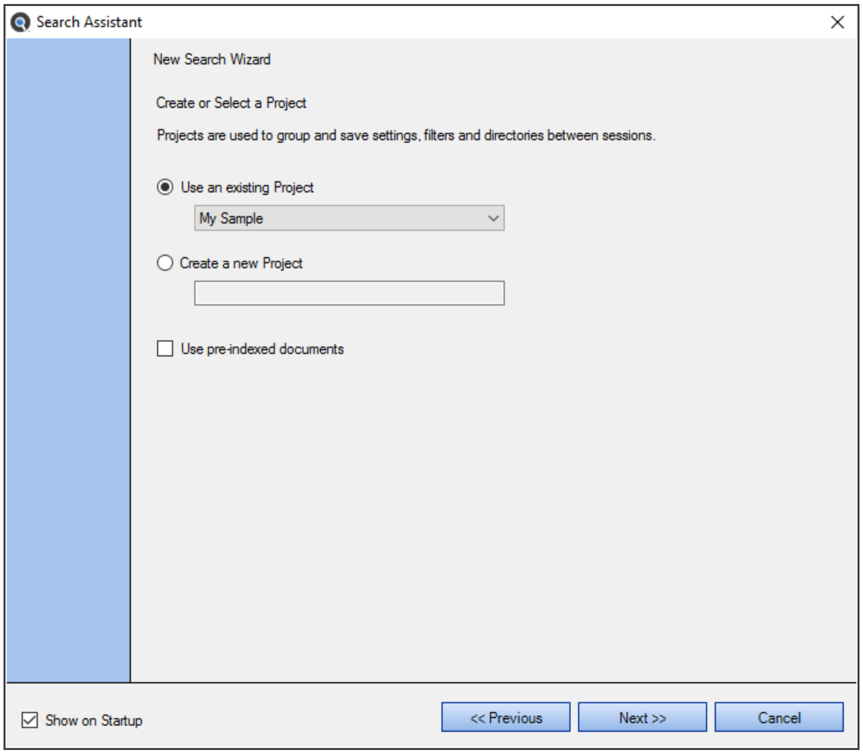
The **Search Wizard** is launched only via the **Wizards** button (i.e. this wizard cannot be accessed via the menu), as follows:

1. See: "Search Wizard" on page 31.
2. Click to choose one of the following **Search Wizard** options:
   - 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)**
   - Option 10: **Replace the username, password, server or database of my Reports in an SAP BOE or Crystal Server repository**
3. Click on the **Next >>** button to continue.
4. 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. "Launch the Search Wizard" on the previous page. The following dialog will appear:



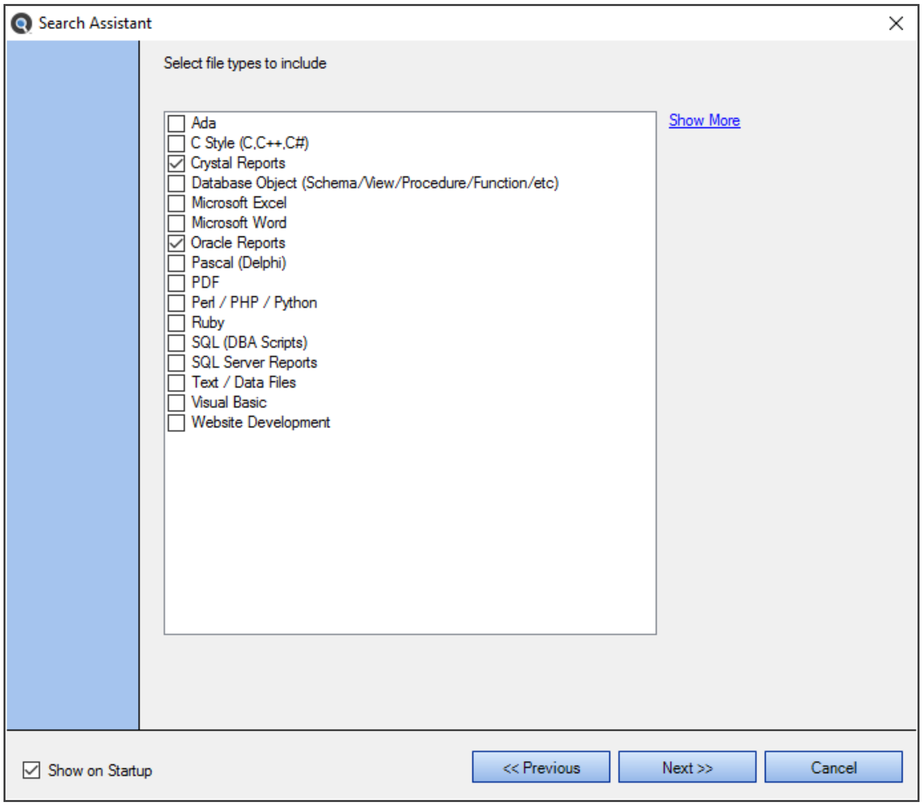
2. To use an existing project for your search:
   a. Click to choose the **Use an existing Project** option (selected by default).
   b. From the project drop-down list, click to select the name of the existing project (i.e. settings) you would like to use for your search.
3. To create a new project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

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

Select File Types to Include

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

Note: The **Show More** link located to the right of the list below, when clicked, auto refreshes the list of available items to include the "hidden" but available source items (**See:**"Set Source Items" on page 24. When a "hidden" item is checked, it will become visible going forward on the **Source** panel on the main screen and automatically be included in your project settings.



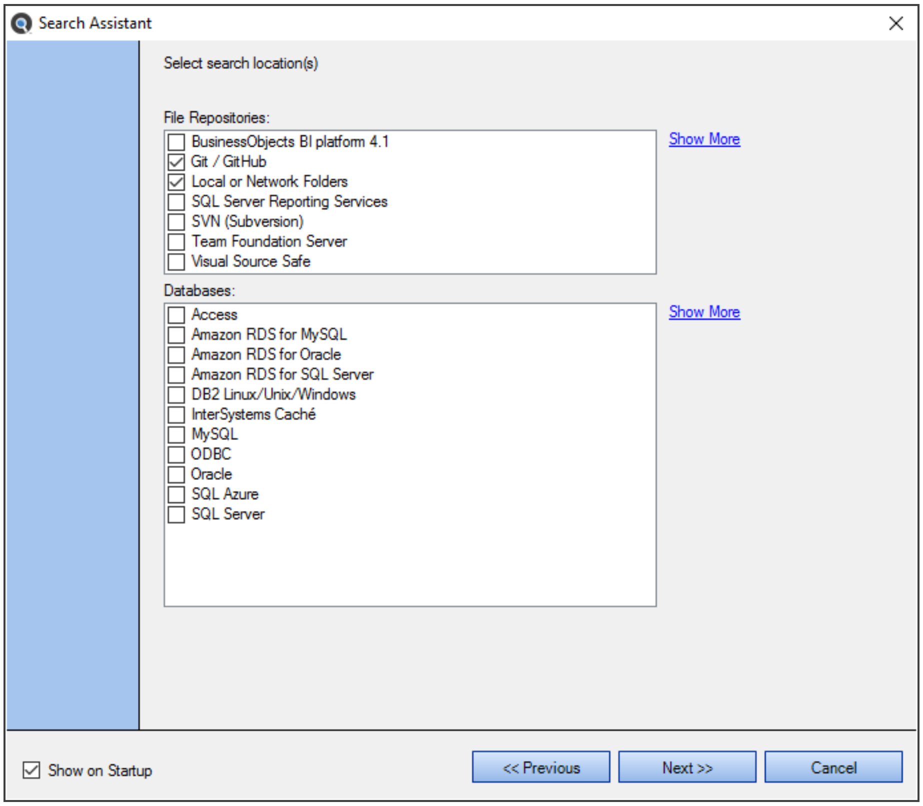
1. In the **Select file types to include** list, click to select (i.e. check) the check-box preceding each file type you want to include in your search. See note above re: **Show More**.
2. Click on the **Next >>** button to continue.

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

Select Search 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 (**See:**"Set Source Items" on page 24. When a "hidden" item is checked, it will become visible going forward on the **Source** panel on the main screen and automatically be included in your project settings.

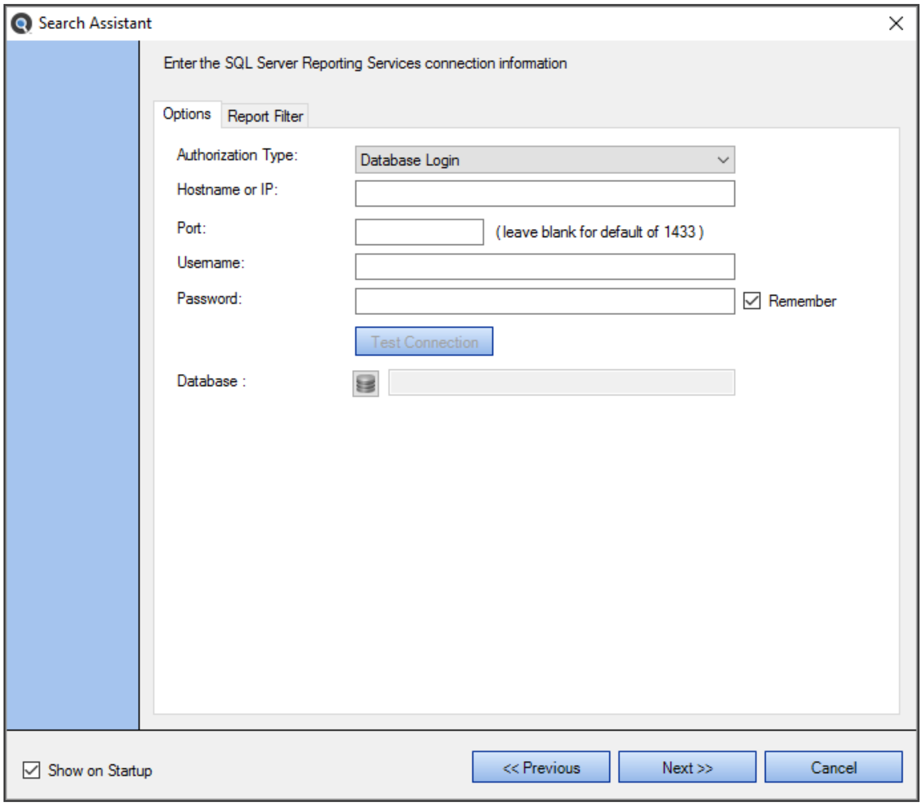


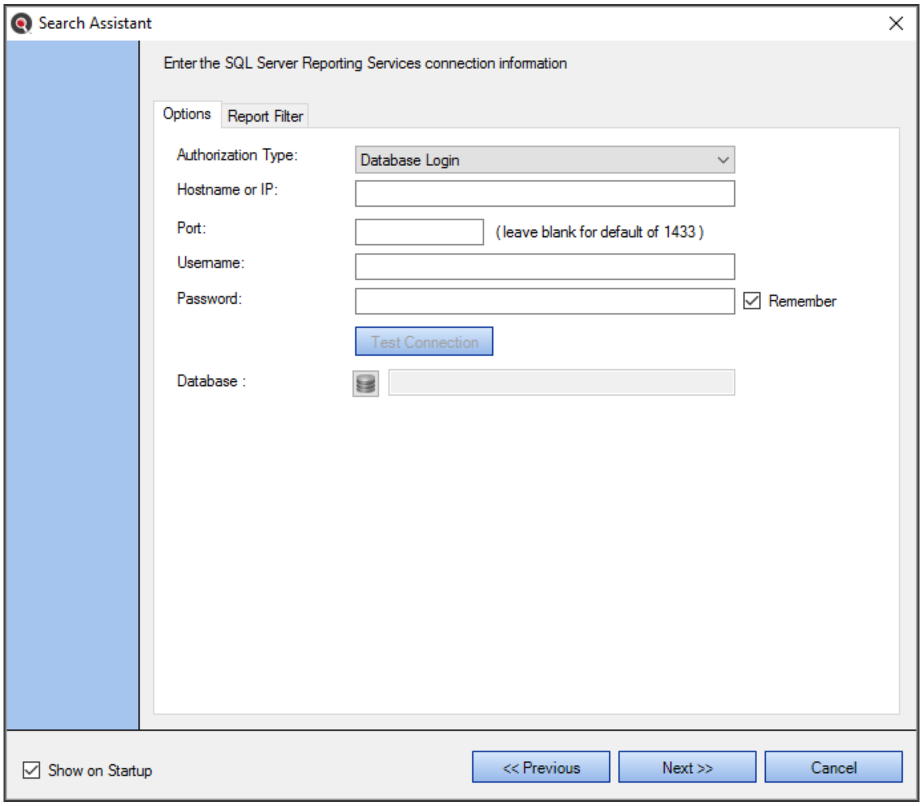
1. In the **File Repositories** list, click to select the source repository repositories within which you want to search.
2. In the **Databases** list, click to select the source database(s) within which you want to search.
3. Click on the **Next >>** button to continue.

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

Enter Connection Information

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

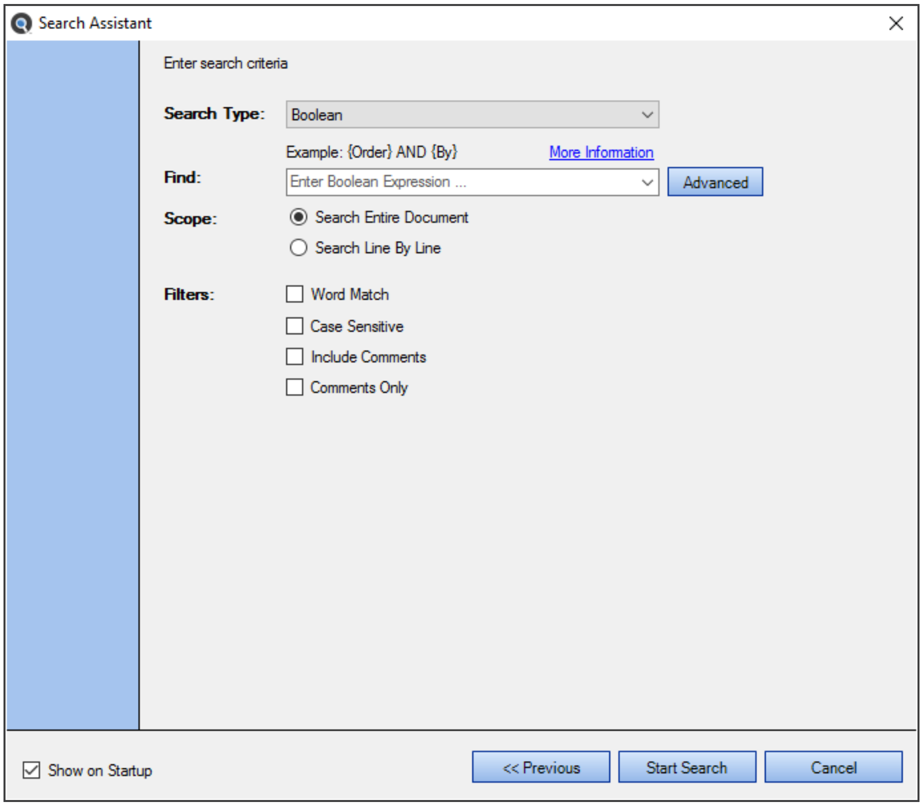

Search Assistant
Enter the SQL Server Reporting Services connection information
Options
Report Filter
Authorization Type:
Database Login
Hostname or IP:
Port:
(leave blank for default of 1433)
Username:
Password:
Remember
Test Connection
Database :
Show on Startup
<< Previous
Next >>
Cancel



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.
3. To apply a report filter, click on the **Report Filter** tab and see links below.
4. To continue, click on the **Next >>** button.

Enter Search Criteria and Start Search

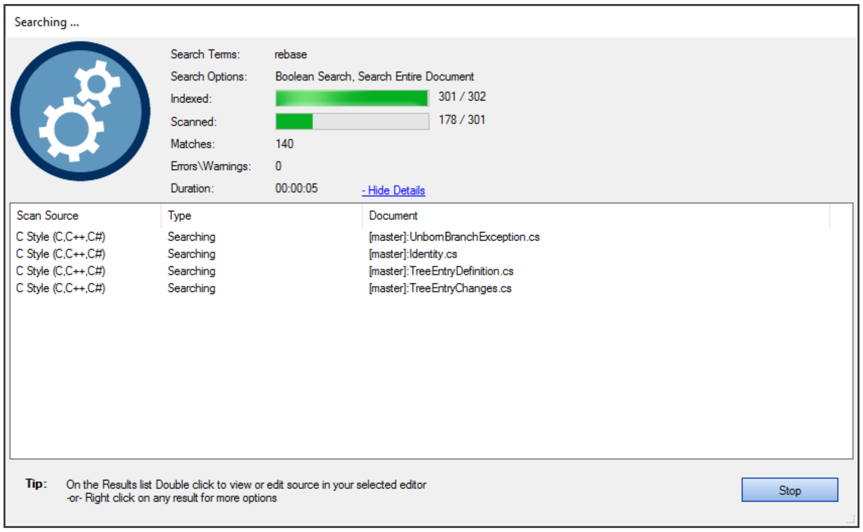
This dialog is only included in the first **Search Wizard** option. See below:



1. From the **Search Type** drop-down list, click to select one of the following options:
   - **Boolean** (can search entire document or line by line)
   - **Wildcard** (will search line by line)
2. In the **Find** text box, enter the desired search expression.

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

   - To view or select from a list of recent search expressions, click on the field to view a drop-down list and click to select the desired search expression.
   - To perform a search using the **Boolean Search Builder**, click on the **Expression Builder** button. Refer to the See Also links below.
3. If you have selected 'Boolean' in step 1 above, click to choose a **Scope** option:
   - **Search Entire Document**
   - **Search Line by Line**
4. In the **Filters** section, click to select the desired filters:
   - **Word Match**
   - **Case Sensitive**
   - **Include Comments**
   - **Comments Only**
5. To launch the search, click on the **Start Search** button. A **Searching ...** dialog will appear. See example below:



6. To stop the search, click on the **Stop** button.
7. Once the search is complete, any results matching your search criteria will appear in the **Results** window.

See Also:

- "Perform a Regular Search" on page 60
- "Use the Expression Builder" on page 65
- "Create or Select a Project" on page 35
- "Local or Network Folders" on page 75
- "Repositories" on page 78
- "Databases" on page 132
- "Apply File Filter" on page 77
- "Apply Report Filter" on page 80
- "Projects" on page 73
- "Use Pre-Indexed Documents" on page 64
- "Example Boolean Expressions" on page 66
- "Find it EZ Custom Boolean Syntax" on page 66
- "Work With Search Results" on page 97

Compare Wizard

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

Launch the Compare Wizard

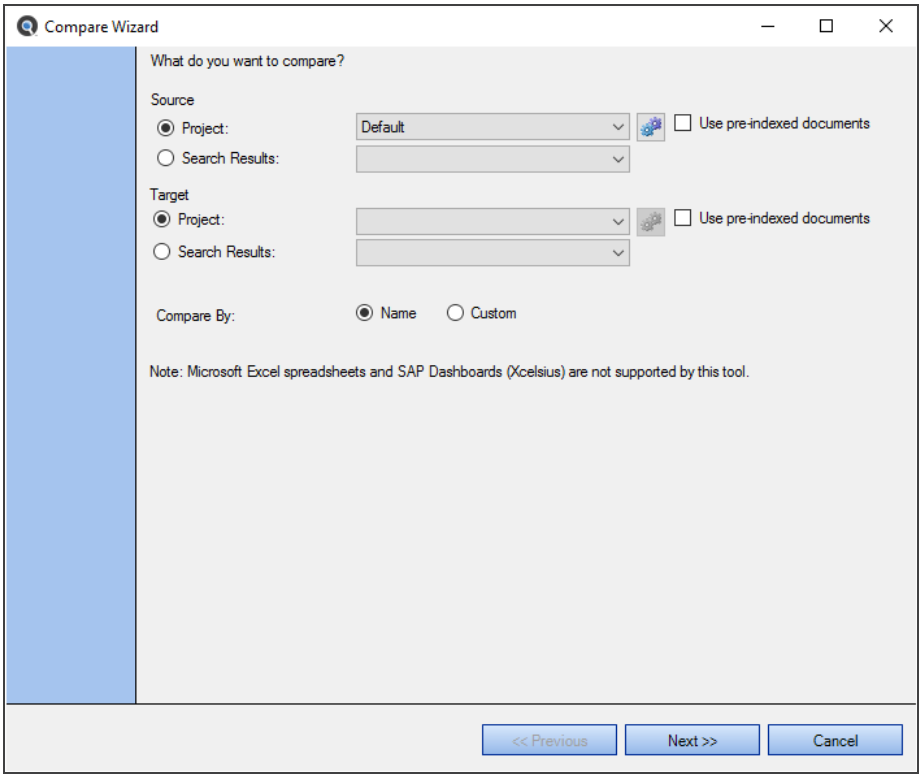
The **Compare Wizard** can be launched via the **Search Wizard** or via the menu. See below:

1. Launch the **Compare Wizard** via the **Search Wizard**:
   a. See: "Search Wizard" on page 31.
   b. Click to choose the following **Search Wizard** option:
      - Option 11: **Compare database schema, reports or files for differences between versions**

   OR

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

Choose Compare Source and Target



Note: Microsoft Excel spreadsheets and SAP Dashboards (Xcelcius) are not supported by this tool.

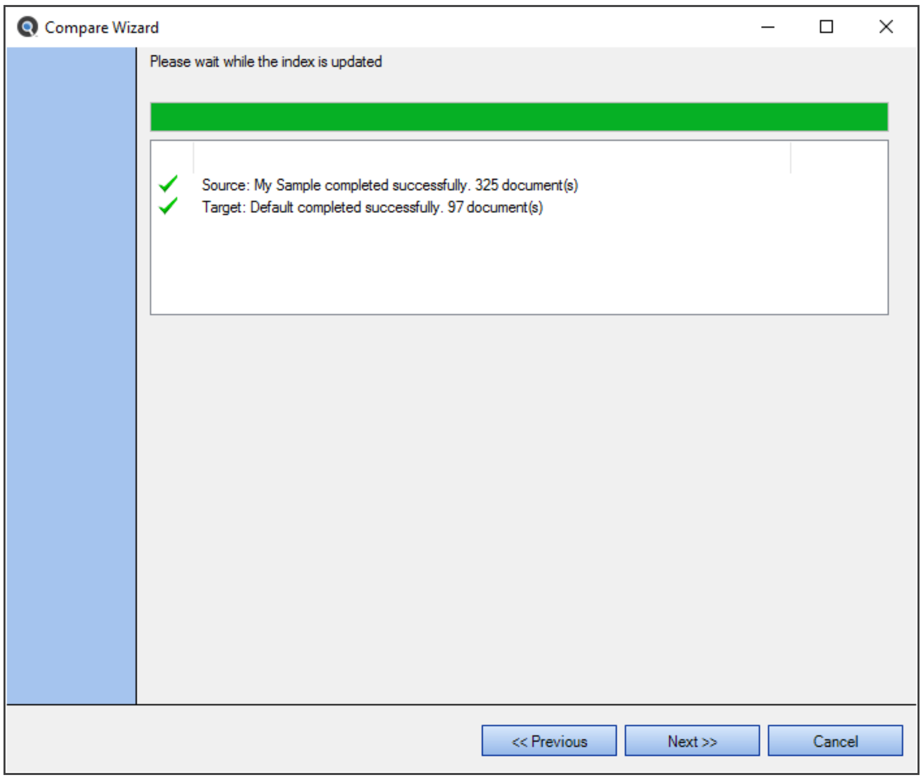
1. To compare a project:
   a. In the **Source** or **Target** section, choose the **Project** option.
   b. From the project drop-down list, click to select the name of the project you want to compare.
   c. To change settings for the selected project, click on the corresponding gears icon.
   d. If desired, click to check the **Use pre-indexed documents** check-box.

   See: "Use Pre-Indexed Documents" on page 64

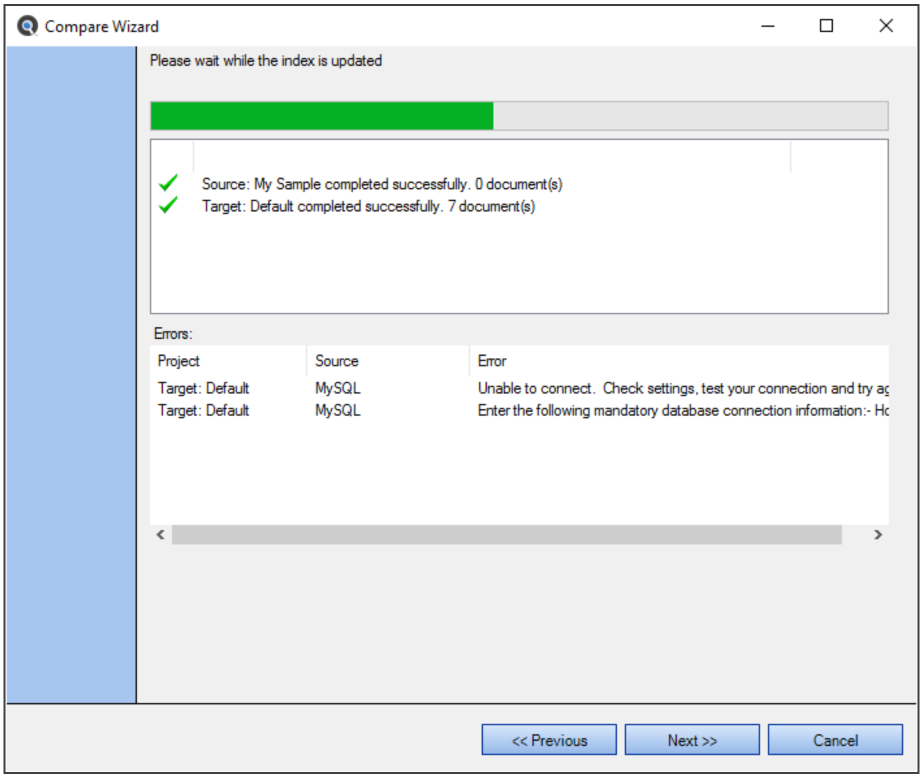
2. To compare search results:
   a. In the **Source** or **Target** section, choose the **Search Results** option.
   b. From the search results drop-down list, click to select the desired search results. Note the date and time.
3. In the **Compare By** section, click to choose one of the following methods of comparison:
   - **Name**
   - **Custom**
4. To continue, click on the **Next >>** button.

Update Index for Compare

Once you choose the compare source and target and click on the **Next >>** button, the index begins updating. See example below:



The next example contains some errors:

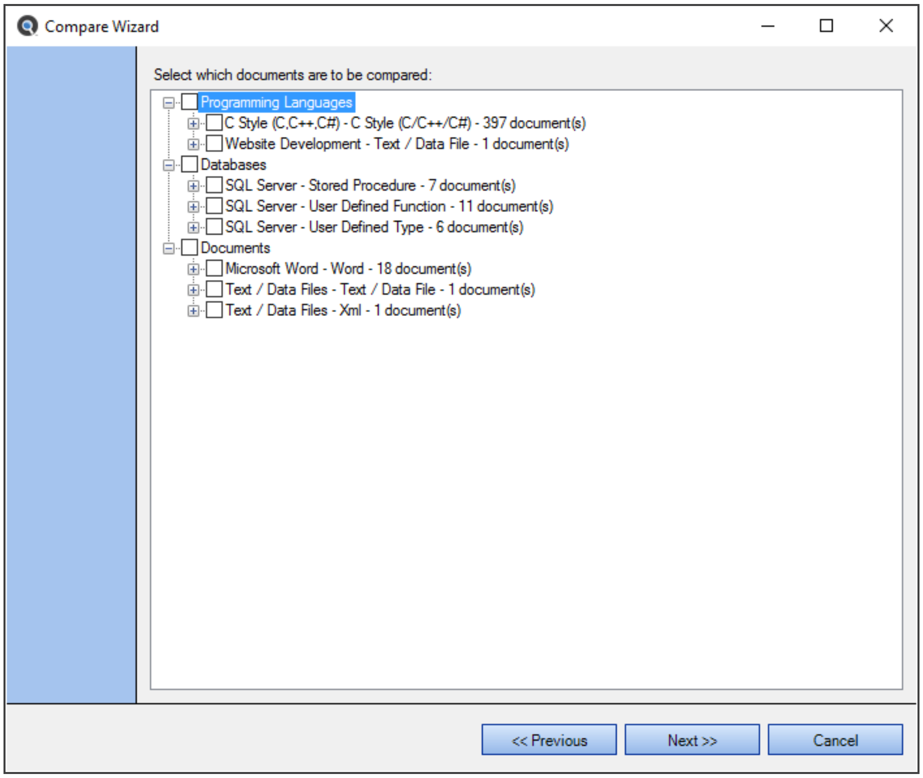


Use the horizontal scroll bar to view details of any errors, then correct any issues.

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

Select Documents to Compare

After selecting the source and target and then allowing the index to update, you can select the documents for comparison. See example below:

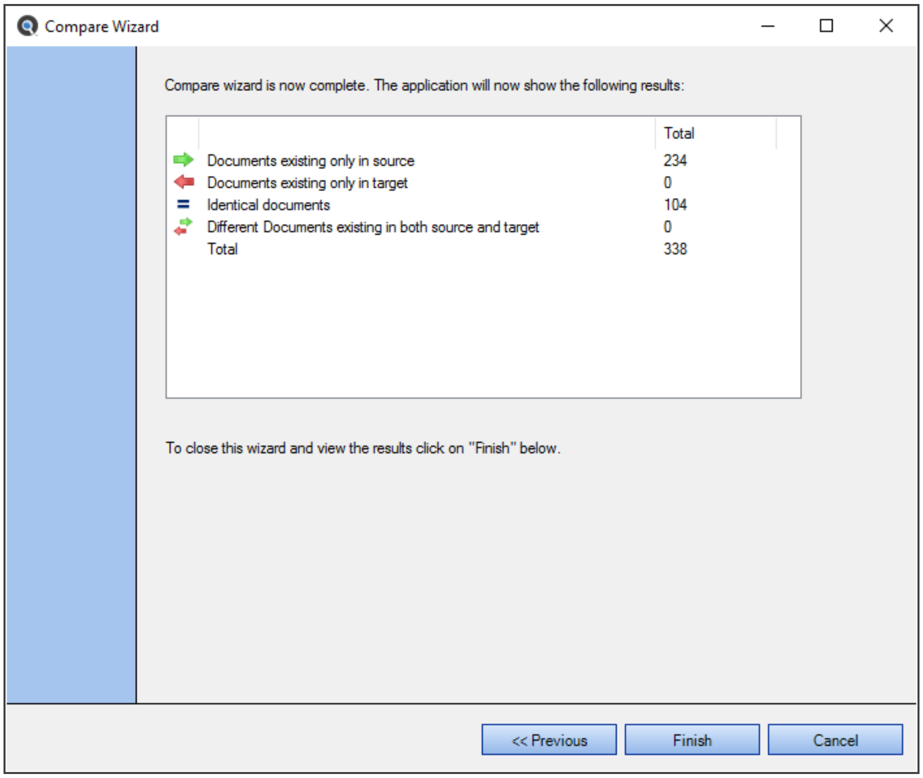


Click to check a category to 'select all' for a category. Or, click on the '+' to expand a document type and click to check the desired documents for comparison.

Once complete, click on the **Next >>** button to continue.

View Compare Results Summary

Once the compare is complete, the following summary will appear. See example below:



To close the **Compare Wizard** and view the results in the **Results** window, click on the **Finish** button.

See Also:

- "Search Locations and Source Settings" on page 75
- "Use Pre-Indexed Documents" on page 64
- "View Compare Results Detail" on page 113
- "Compare Files, Reports, and Databases" on page 113

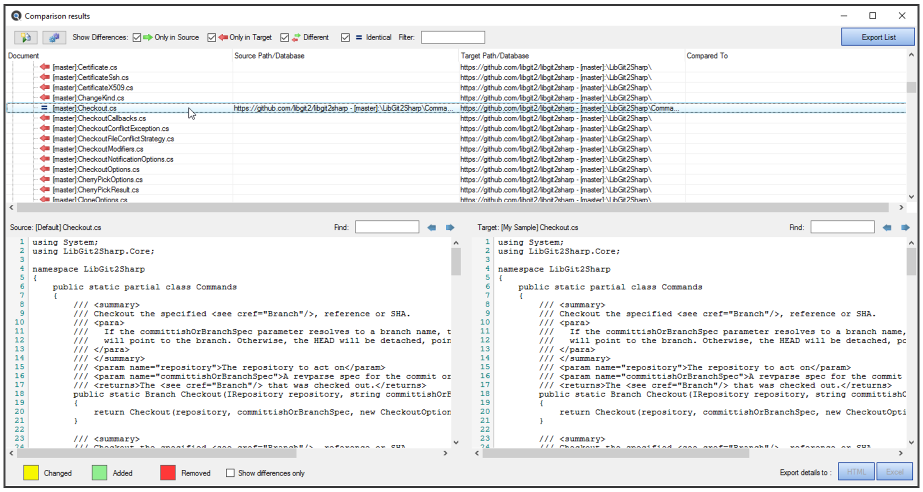
Compare Files, Reports, and Databases

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

View Compare Results Detail

See: "Compare Wizard" on page 42.

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



Start New Compare

1. "View Compare Results Detail" on the previous page.
2. In the upper, left corner of the **Comparison Results** window, click on the  button. You will be returned to the **Compare Wizard** to start a new comparison.

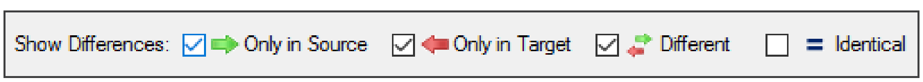
Modify Current Compare

1. "View Compare Results Detail" on the previous page.
2. In the upper, left corner of the **Comparison Results** window, click on the  button. You will be returned to the **Compare Wizard** to select which documents you want to compare.

Show Differences

See:"Compare Wizard" on page 42.

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



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

- **Only in Source**
- **Only in Target**
- **Different**

To view comparison results that are matching, click to check the **Identical** check-box.

Filter or Search Compare Results

1. At the top of the **Comparison Results** window, locate the **Filter** text box.
2. Enter the desired filter/search text into the text box. The results list will update automatically to show only those results matching your specified criteria.

Export Compare Results

See: "Compare Wizard" on page 42.

1. "Filter or Search Compare Results" on the previous page.
2. At the top of the **Comparison Results** window, locate and click on the **Export List** button. A **Save As** dialog will appear.
3. Enter a **File name**.
4. Click on the **Save** button.

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

5. The saved list will open automatically with the selected viewer/editor.
6. The following data will be included in the exported file:
   - Source, Target, and Date Created
   - View filter(s)
   - Type
   - # Differences
   - Document
   - Source Host
   - Source File Path or Database
   - Target Host
   - Target File Path or Database
   - Compared To
7. Save the file as desired.

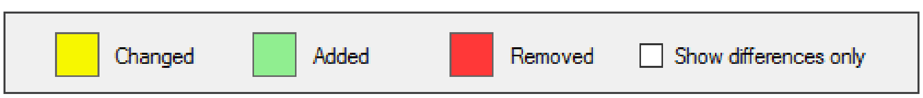
Expand or Collapse Compare Results

In the results list on the **Comparison Results** window, results are grouped by document and document type. To expand or collapse a result group, click on the '+' or '-' button, respectively.

Compare Status Colours

See: "Compare Wizard" on page 42.

At the bottom of the **Comparison Results** window, there is a result status colour key. See below:



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

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

Find in Source or Target

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

Show Differences Only

To view only the differences in content between the source and target, click to check the **Show differences only** check-box.

Export Compare Details

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

See Also:

- "Compare Wizard" on page 42
- "Select Documents to Compare" on page 1
- "Viewer / Editor Settings" on page 28

Document Wizard

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

Launch the Document Wizard

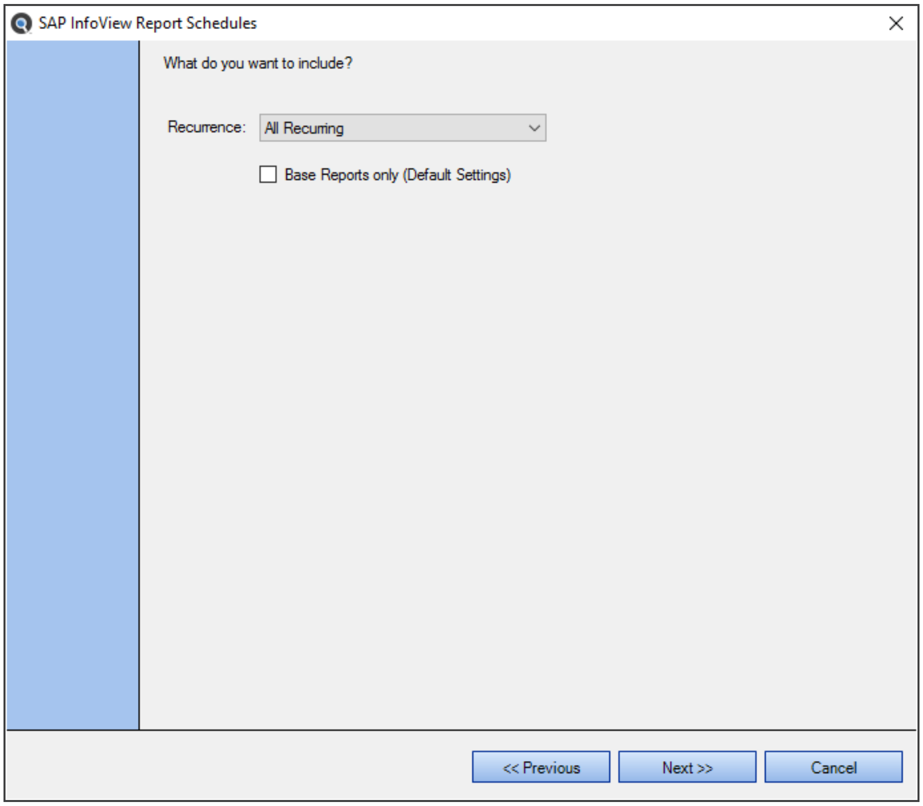
The **Export Wizard** can be launched via the **Search Wizard** or via the menu. See below:

1. Launch the **Export wizard** via the **Search Wizard**:
   a. See: "Search Wizard" on page 31.
   b. Click to choose one of the following **Search Wizard** options:
      - Option 2: **Extract database objects (tables, stored procedures, views, etc.) used in my reports**
      - Option 3: **Generate detailed content documentation for my reports**
      - Option 4: **Extract all SQL code used in my reports**
      - Option 5: **Create a database cross-reference for my reports**
      - Option 6: **List all my reports, including printer and update information**
      - Option 8: **List the schedule for my reports inside an SAP BOE or Crystal Server repository**
      - Option 9: **List the security for my reports inside an SAP BOE or Crystal Server repository**

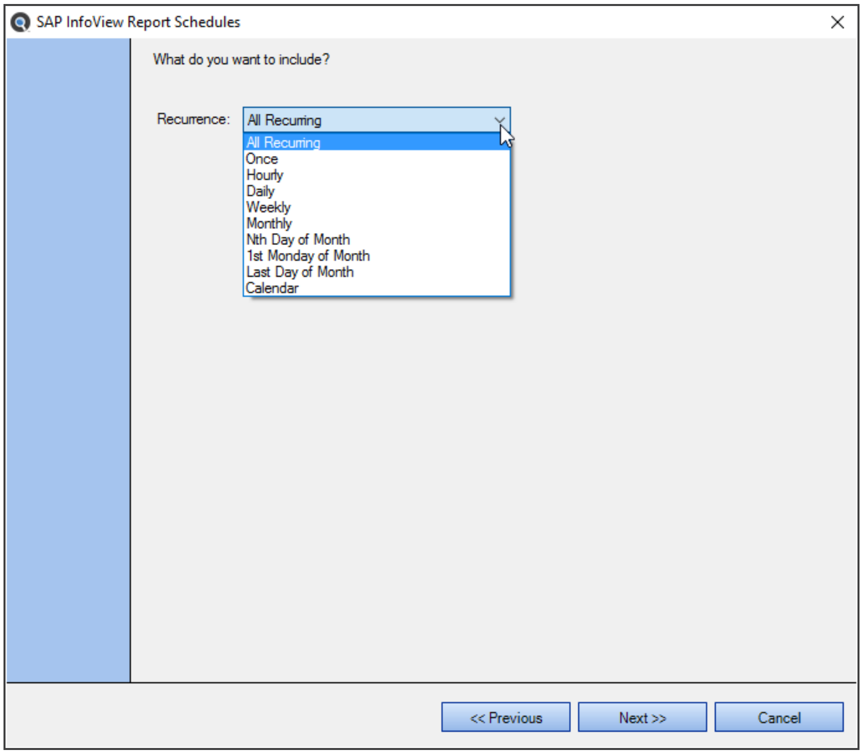
   OR
2. Launch the **Export Wizard** via the menu:
   - From the Find it EZ menu, select **Reports -> Business Intelligence -> [Any Option]**
   - From the Find it EZ menu, select **Document -> SAP BOE / Crystal Server -> [Any Option]**
3. Click on the **Next >>** button to continue.
4. The **Export Wizard** will open.

Select Recurrence and What to Include

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


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 BOE repository schedules.

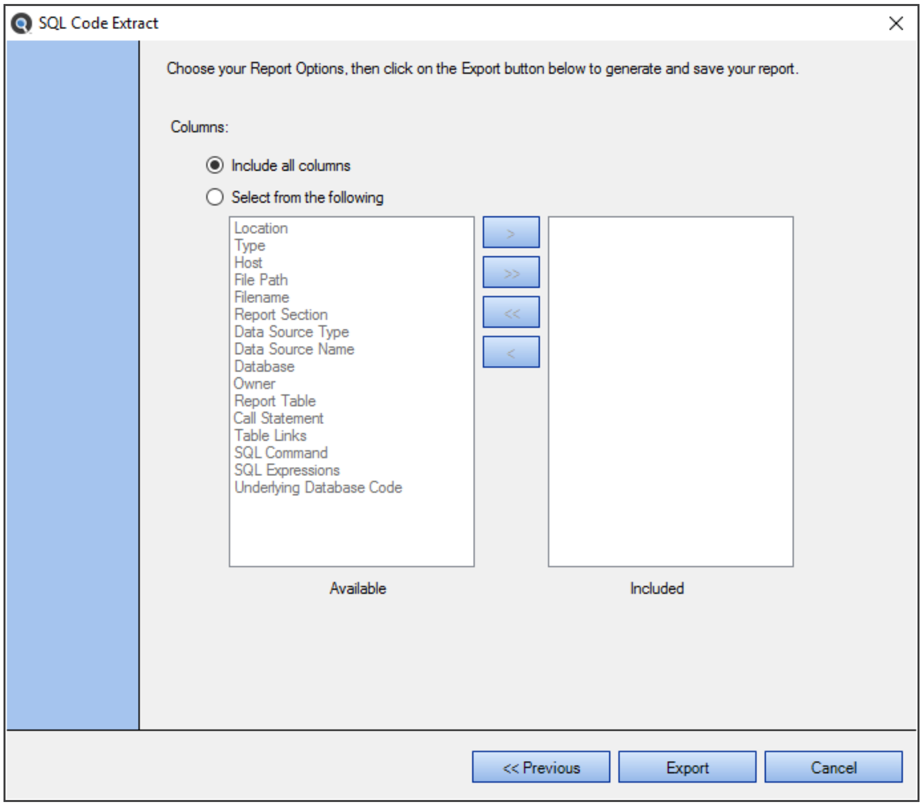
2. Click to select the desired recurrence.
3. If you want to show the default settings, click to check the **Base Reports only** check-box.

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

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

Choose Report Options and Export Report

The following dialog is used with the **Export Wizard**. See example below:



1. In the **Columns** section, choose to **Include all columns** or to **Select from the following**.
2. IF the second option is chosen:
   a. In the **Available** list, click to select the report column you want to include, then click on the **->** button to move the selected column to the **Included** list.
   b. To move all columns from the **Available** list to the **Included** list, click on the **->->** button.
   c. To remove all columns from the **Included** list, click on the **<<** button.
   d. To remove a single column from the **Included** list, click to select the report column you want to remove, then click on the **<** button.
3. Once complete, click on the **Export** button to generate and save your report. The Searching dialog will appear.

See Also:

- "Create or Select a Project" on page 35
- "Select File Types to Include" on page 36
- "Select Search Location(s)" on page 37
- "Enter Connection Information" on page 38
- "Navigation" on page 1
- "Launch the Document Wizard" on page 1

Replace Wizard

This section takes you through each step required to use the **Conversion Wizard**: 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 Wizard

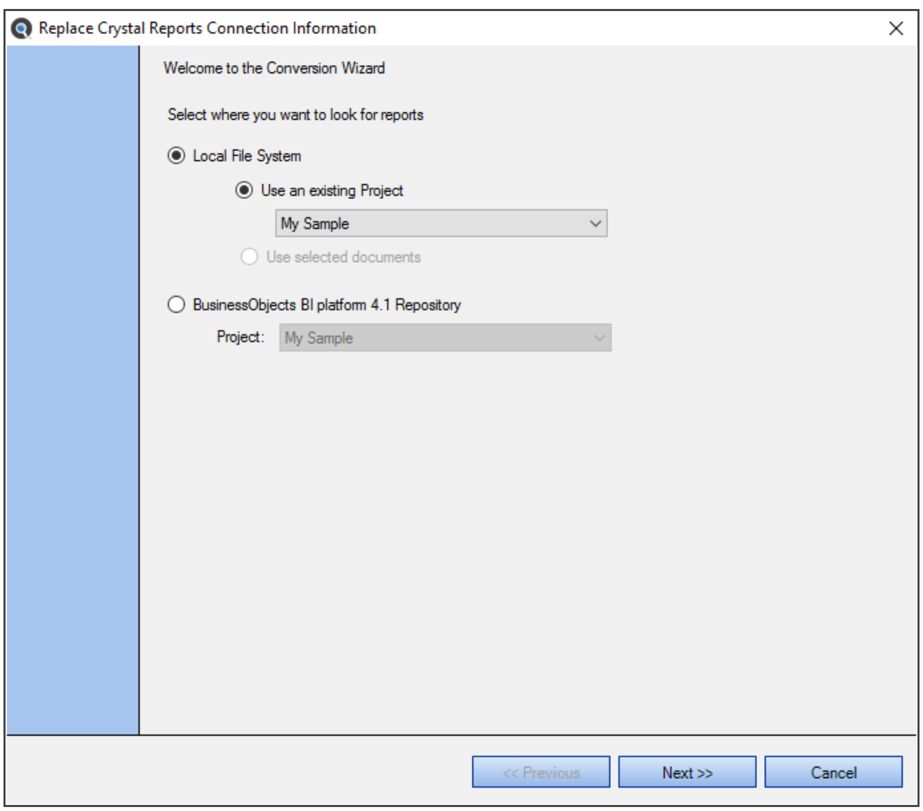
The **Conversion Wizard** can be launched via the **Search Wizard** or via the menu. See below:

1. Launch the **Conversion wizard** via the **Search Wizard**:
   a. See: "Search Wizard" on page 31.
   b. Click to choose the following **Search Wizard** option:
      - Option 7: **Replace Crystal Report data source connections or qualified table names**

   OR
2. Launch the **Conversion Wizard** via the menu:
   - From the Find it EZ menu, select **Replace -> Crystal Reports -> Data source connections or qualified table names**

     OR
   - From the Find it EZ menu, select **Replace -> Crystal Reports -> BOE BI Database logon information**
3. The **Conversion Wizard** will open.

Select Where to Look for Reports

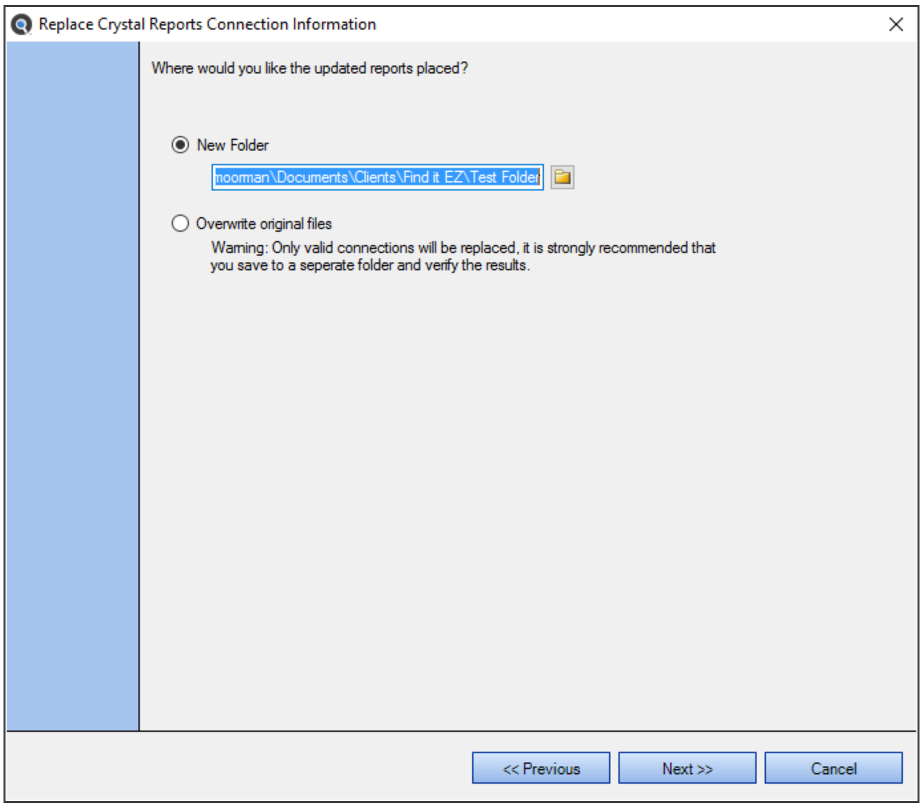


1. Select where you want to look for reports:
    a. Choose **Local File System**.

        OR

    b. Choose **BusinessObjects BI Platform 41 Repository**.
2. Click on the corresponding project drop-down list and select the desired project.
3. If you have one or more search results selected, click to choose the **Use selected documents** option. This is a way of running the report with only a subset of items based on your last search.
4. To continue, click on the **Next >>** button.

Select Report Destination Folder



1. To place the updated reports in a new folder, click to choose the **New Folder** option.
    a. Click on the folder icon to the right of the text field. A **Select Folder** dialog will appear.
    b. Create or navigate to and select the desired folder.
    c. Click on the **Select Folder** button. The selected folder path will now appear in the text field.

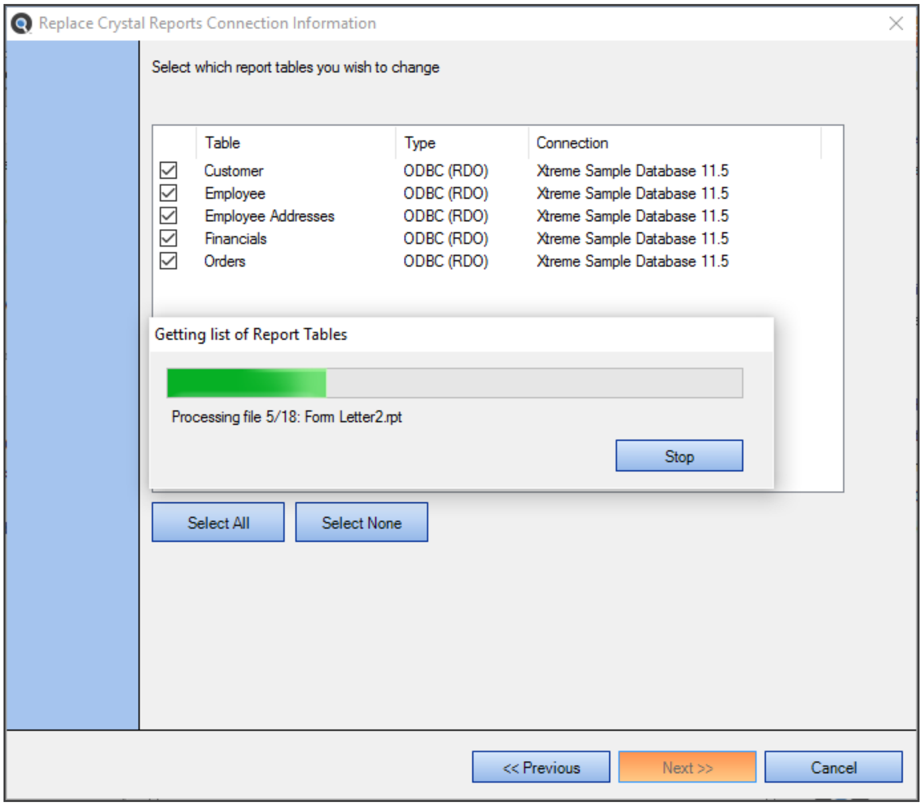
    OR

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

    > **Alert:** Only valid connections will be replaced. It is strongly recommended that you save to a separate folder and verify the results.

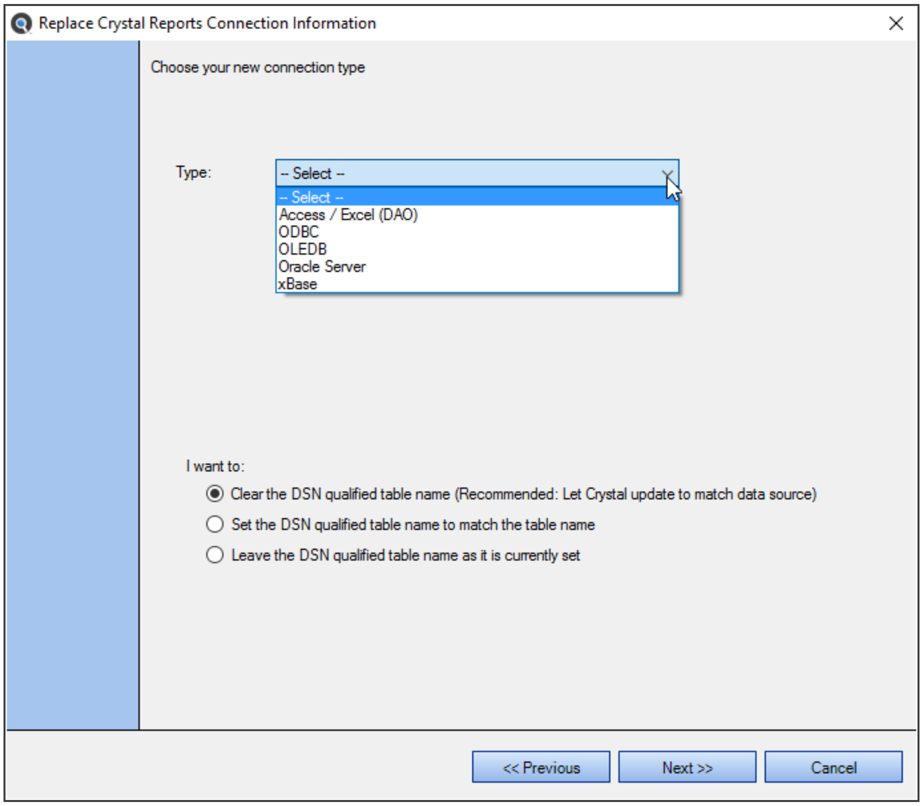
3. To continue, click on the **Next >>** button.

Select Report Tables to Change



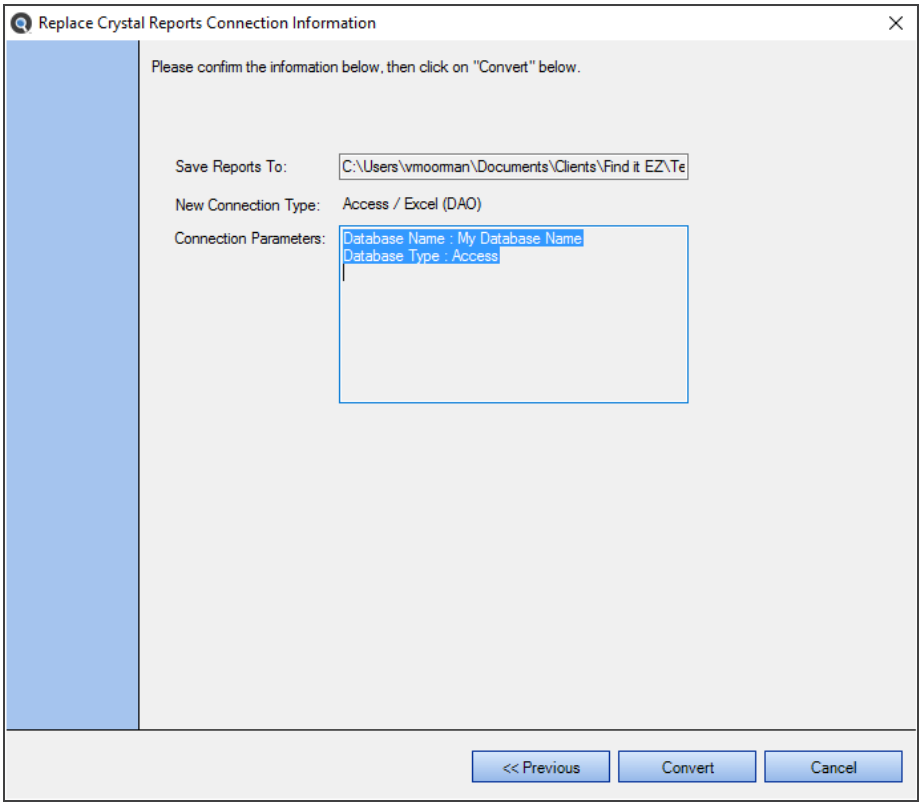
1. A list of report tables from the selected location will load. See example above:
2. To stop Find it EZ from loading report tables, click on the **Stop** button.
3. For each report table to want to change, click to check the preceding check-box. Note that all report tables in the selected location are selected by default.
    a. To de-select all available report tables, click on the **Select None** button, then click to check only those you wish to include.
    b. To select all available report tables, click on the **Select All** button, then click to uncheck only those you wish to exclude.
4. To continue, click on the **Next >>** button.

Choose New Connection Type



1. Select the new connection type:
    a. Click on the **Type** field to view a list of connection types.
    b. Click to select the desired connection type.
2. Enter and/or select connection parameters:
    a. For **Access / Excel (DAO)** and **xBase**, click on the folder icon and navigate to and open the desired folder.
    b. For **ODBC**, select the **ODBC DSN** and enter the **Username** and **Password**.
    c. For **OLEDB**, **Configure OLE** (via Data Link Properties) and enter the **Username** and **Password**.
        i. Click on the **Configure OLE** button. The **Data Link Properties** dialog will appear. This dialog is opened by default.
        ii. Select the **Provider** and click on the **Next** button.
        iii. Enter **Connection** parameters and click on the **Test Connection** button.
        iv. Enter any further required details (depending upon the selected **Provider**).
        v. Click on the **OK** button.
    d. For **Oracle Server**, enter the **Service**, **Username**, and **Password**.
3. Tell Find it EZ what you want to do:
    a. In the **I want to** section, click to choose the desired option.
4. To continue, click on the **Next >>** button.

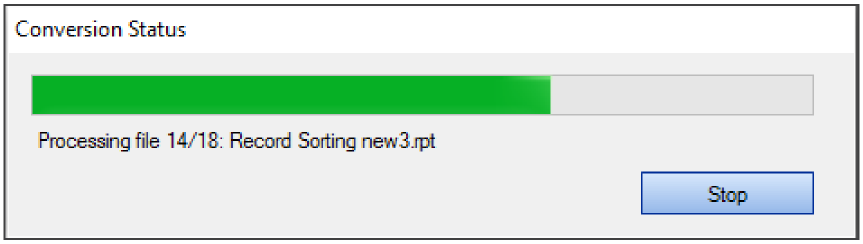
Confirm Information and Replace



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

> **See:**
>
> "Select Where to Look for Reports" on page 54
>
> "Select Report Destination Folder" on page 55
>
> "Select Report Tables to Change" on page 56
>
> "Choose New Connection Type" on the previous page

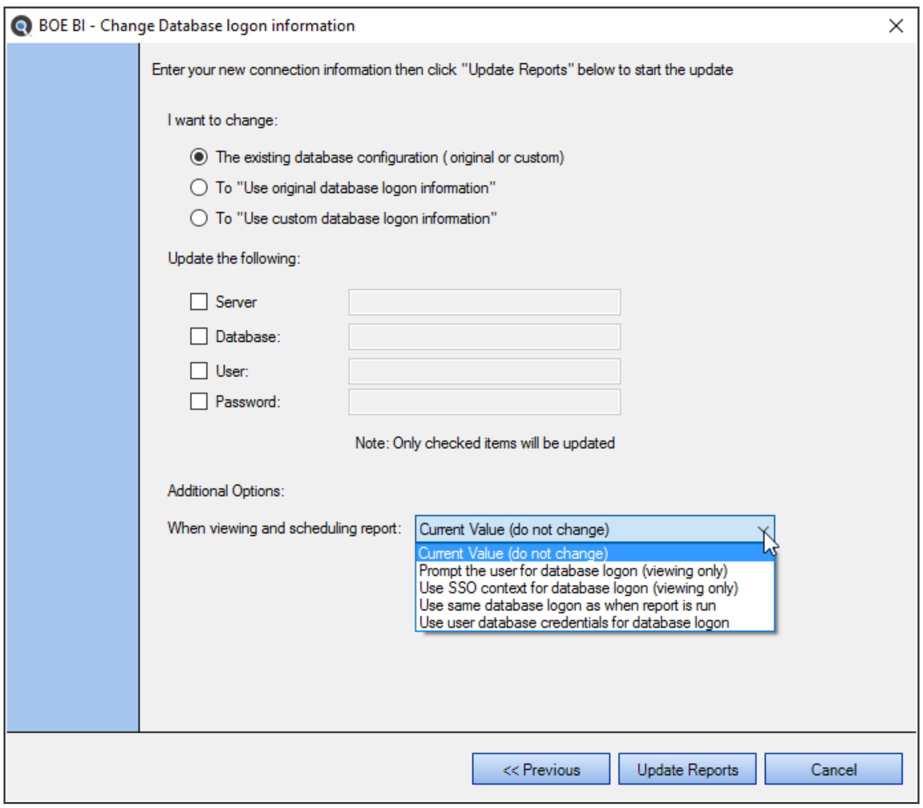
3. If the information is correct, click on the **Convert** button. A **Conversion Status** notification will appear. See example below:



4. To stop the conversion, click on the **Stop** button.
5. Once the conversion is complete, Microsoft Excel will lauch and open a **Conversion Results** spreadsheet containing a detailed **Conversion Log**.

Enter New Connection Information and Update Reports

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



1. In the **I want to change** section, click to choose the desired option.
2. In the **Update the following** section:
   a. Click to select (i.e. check) each item that you want to update.
   b. For each selected item, enter the new connection information in the corresponding text box.

Note: Only checked items will be updated.

3. In the **Additional Options** section:
   a. Click on the down arrow to view the drop-down list.
   b. Select the desired option from the list.
4. To start the update, click on the **Update Reports** button.

See Also:

- "Enter Connection Information" on page 38
- "Replace Wizard" on page 54

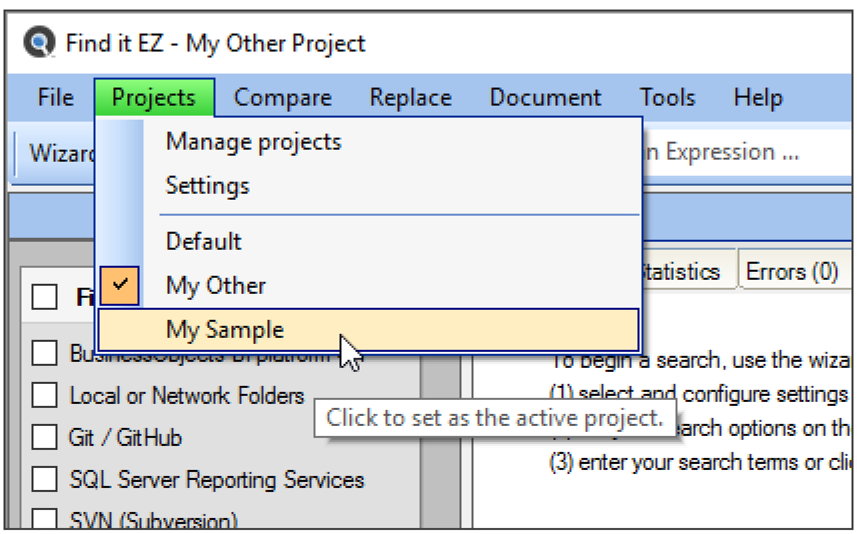
Perform a Regular Search

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

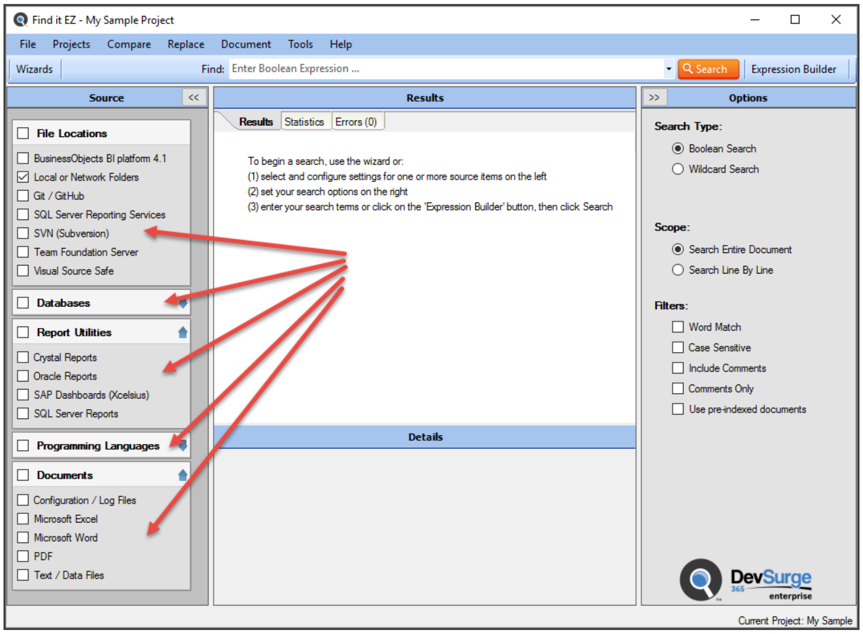
1. From the Find it EZ menu, select **Projects**. The currently active project appears preceded by a check mark, as in the example below:



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.

Configure Source Location(s)

1. From the **Source** frame on the left, select the source(s) within which you want to search; (i.e. **Repositories**, **Databases**, **Report Utilities**, **Programming Languages**, **Documents**).



a. Click on a source. A **[Project Name] Project Settings** dialog will appear, showing settings for the selected source.

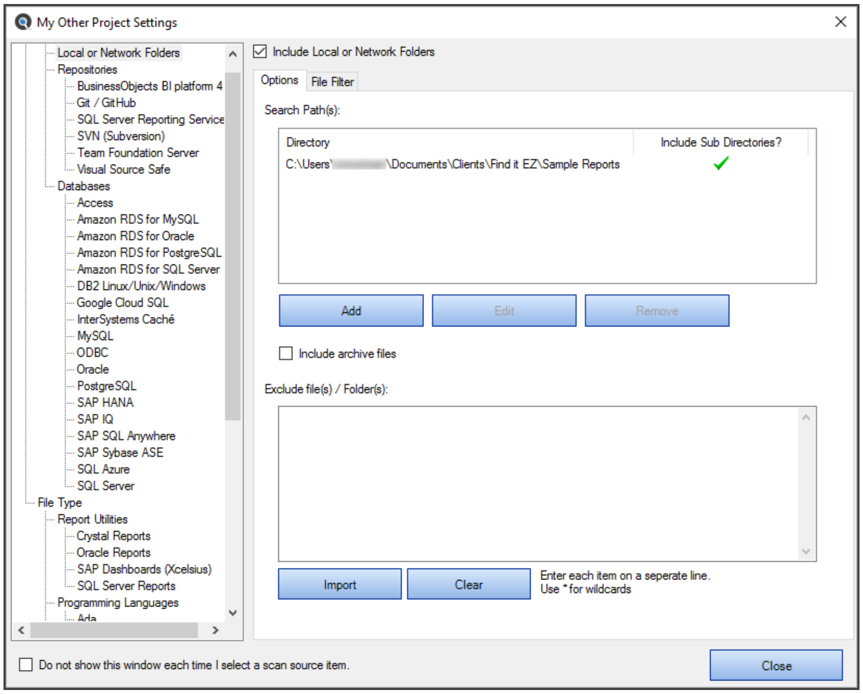
b. To expand or collapse a **Source** category, click on the corresponding blue up/down arrow.

c. Configure settings, as required. Refer to the links below for details:

See:

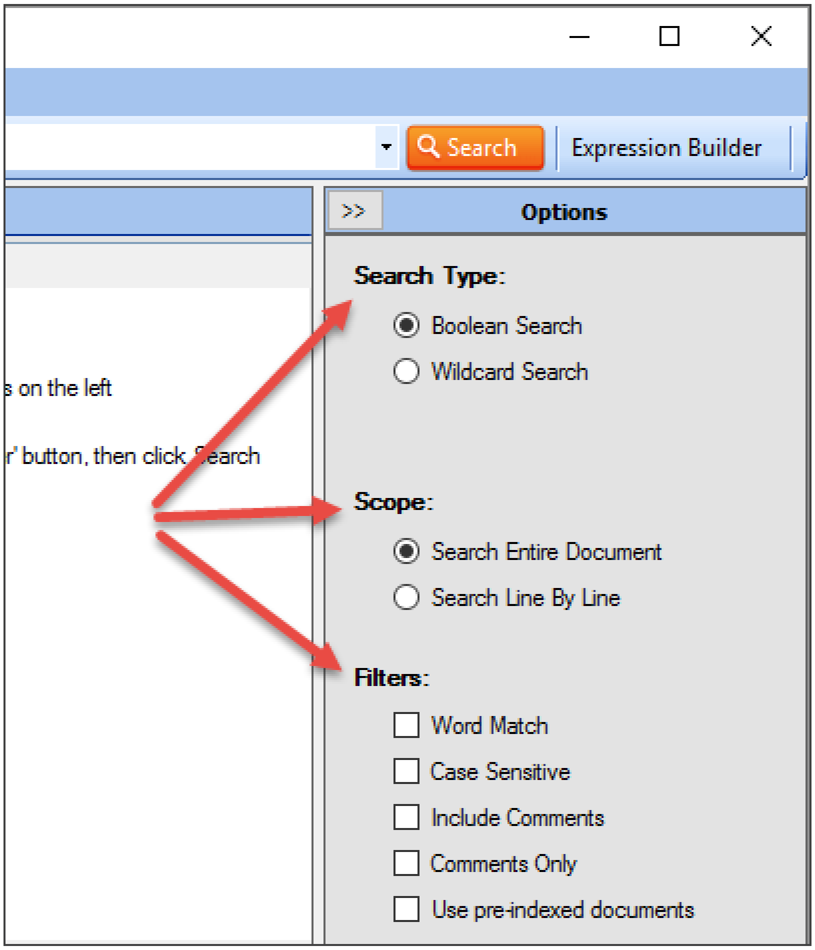
- "Local or Network Folders" on page 75
- "Repositories" on page 78
- "Databases" on page 132
- "Programming Languages" on page 92
- "Documents" on page 94
- "Report Utilities" on page 95

2. Example - search Local or Network Folders:



Set Search Options

From the **Options** frame on the right, choose the desired **Search Type** and **Scope**, and select the desired **Filters**.



Note: Default search **Options** are: **Search Type** = Boolean Search, **Scope** = Search Entire Document, **Filters** = None. Search options can be changed for 'on start-up' or 'new project' search to use this default or to remember your last used settings.

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

See topics to follow...

Boolean Search

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

Boolean search unlocks all of the **Scope** options and **Filter** selections, allowing you to evaluate the search expression on a line by line basis or across an entire document, as desired.

Wildcard Search

The most basic form of a wildcard search is the "*" search; this means show me everything in the selected documents.

Wildcard searching does not allow Boolean expressions (A OR B, A AND B, etc.) in exchange for allowing more control over partial matching.

For example if you search for "User*," the system will only find matches on items that start with "User." In a Boolean search, you only have the option of Word Match (Must be UserName) or Partial Matching (UserName, NewUser, BreadUserBread, etc.).

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

- You can only do a match on a single line.
- Wildcard is "stopped" on a whitespace boundary (i.e. If the text in the document is "UserName Food Type" and you use "User*Type" it will not find a match. However "User*" will match on the first word; " Foo*" on the second. If it was "User-Name.Food.Type" then "User*Type" will match on the whole thing.

Word Match Filter

When the Word Match setting is turned on in **Filters**, the result must be found between a white space boundary (these include spaces, tabs, and line feeds).

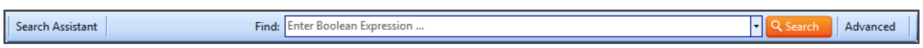
Use Pre-Indexed Documents

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

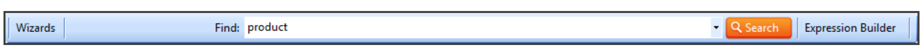
For better search performance, this filter will use the last indexed document content and therefore will not refresh content with latest updates. This is not an issue if it is known that the source documents are changed infrequently or have not changed since the last Find it EZ project indexing.

Enter Target Keyword(s)

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

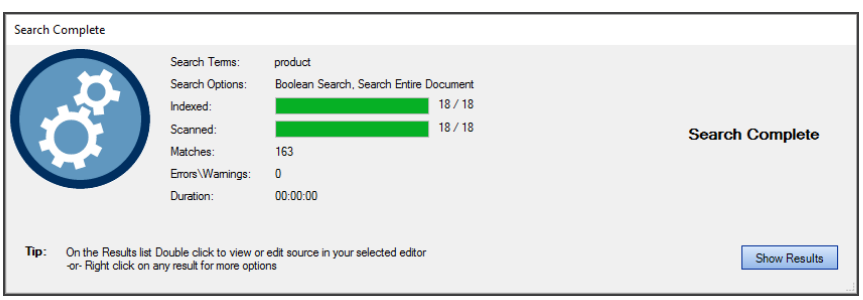


Example:

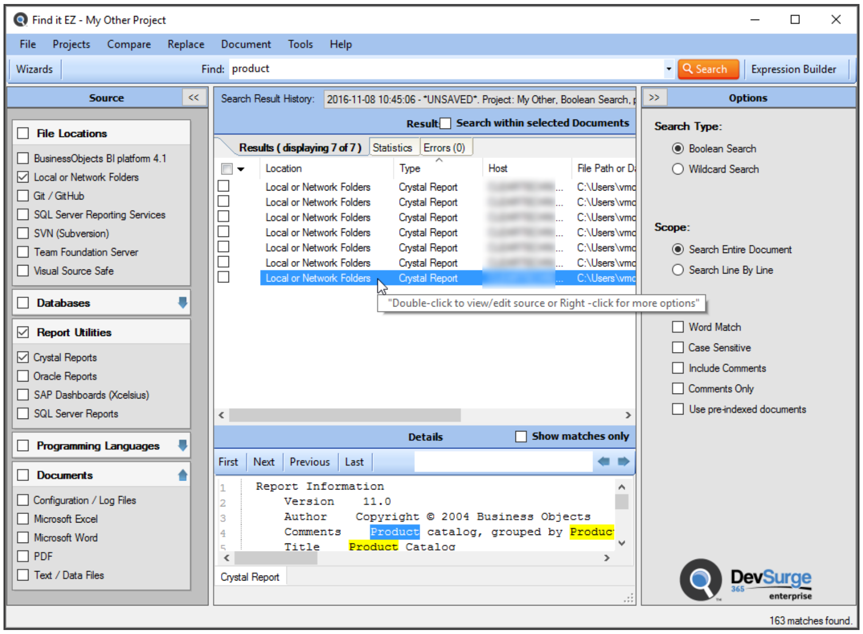


Start Your Search

1. To initiate the search, click on the **Search** button. A **Searching** window will appear, showing the status of the search. See "Searching Window" on page 68 for details.
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. See "Work With Search Results" on page 97 for details.



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:

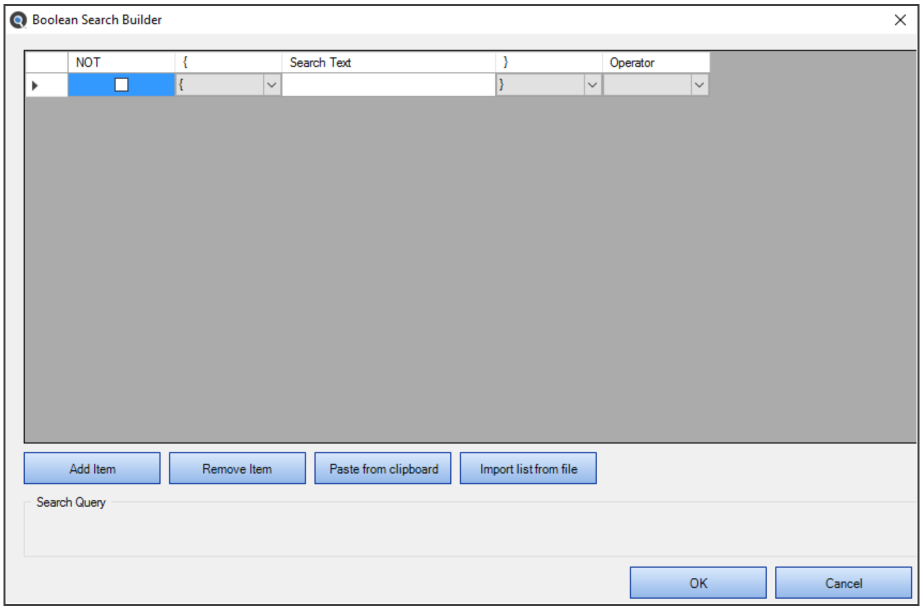
- "Search Wizard" on page 31
- "Projects" on page 73
- "Set User Options" on page 21
- "Use the Expression Builder" below
- "Work With Search Results" on page 97
- "Clear Search History" on page 29
- "View Search Result History" on page 97

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

1. **See:**"Build Search Query" above.
2. 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. **See:**"Build Search Query" on the previous page.
2. To remove a search query item, click on the right arrow button preceding the row to select the item.
3. Click on the **Remove Item** button. The selected item will be removed from the search query.

Paste Search Query Item From Clipboard

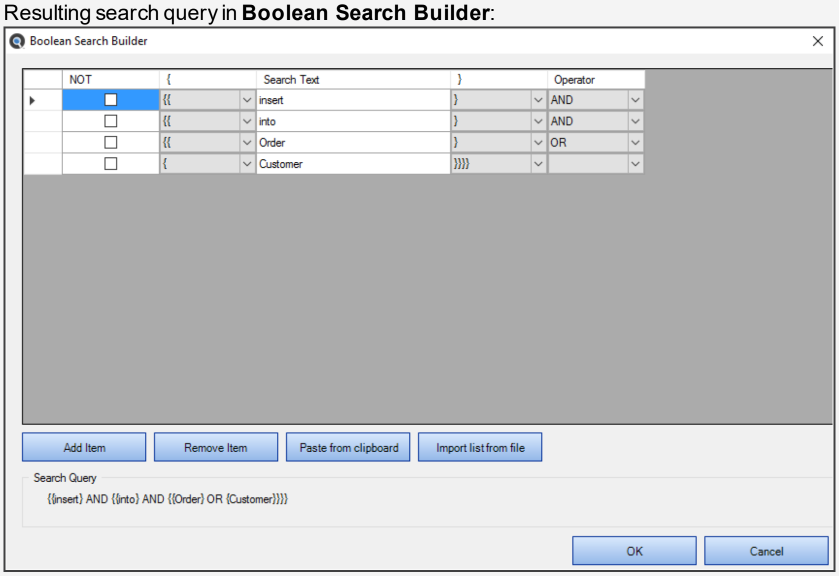
To copy a search query item to the clipboard:

1. Locate the desired searc h query item text.
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. **See:**"Build Search Query" on the previous page.
2. 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. **See:**"Build Search Query" on the previous page.
2. Click on the **Import list from file** button. An **Open** dialog box will appear.
3. 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.

4. Click on the **Open** button. A search query item line will be created for each instance of search text.
5. Apply NOT, curly brackets, and operators (AND/OR) as required.

View Search Query Details

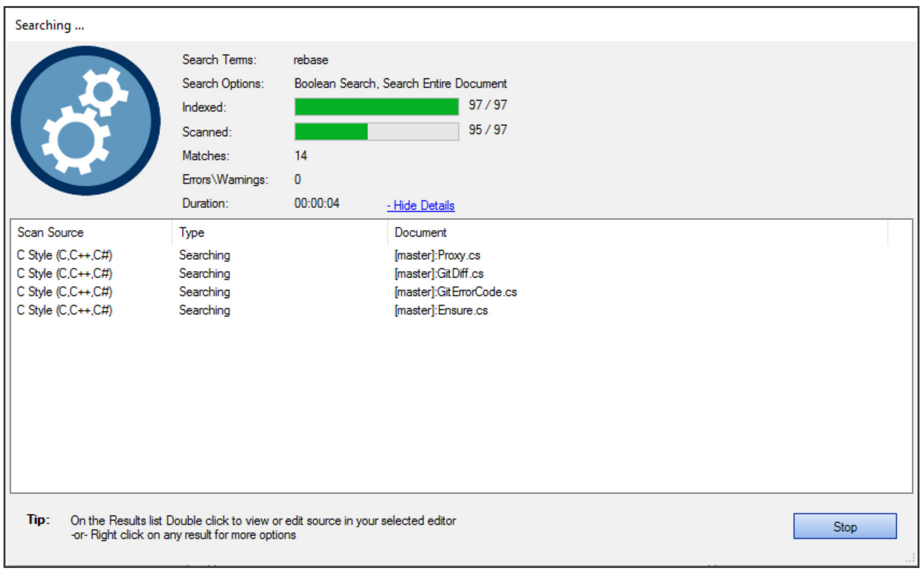
As you are building your search query using the **Boolean Search Builder**, note that the entire search expression is shown in the **Search Query** box at the bottom of the dialog box.

Apply Boolean Expression to Search

1. **See:**"Build Search Query" on page 66.
2. 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.
3. 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**, **Scope**, and **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).

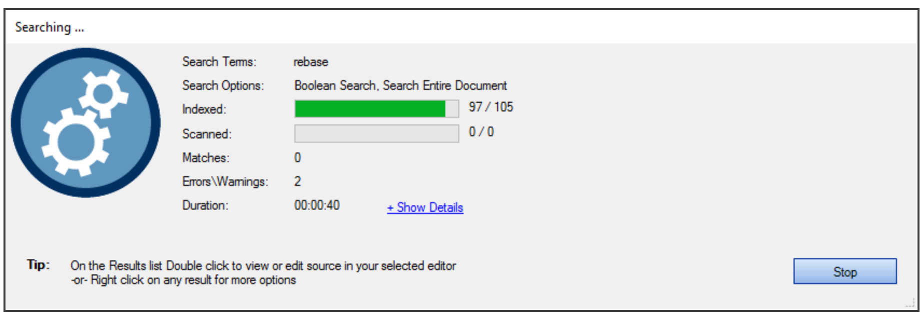
Searching Data Element	Description
Matches	This is the total number of instances where the current search expression has been found in the source documents.
Errors/Warnings	This is the total number of errors or warnings that have been generated while connecting and/or scanning the source documents for 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 **Scan Source**, **Type**, and **Document** being scanned for matches.

Multitask While Searching

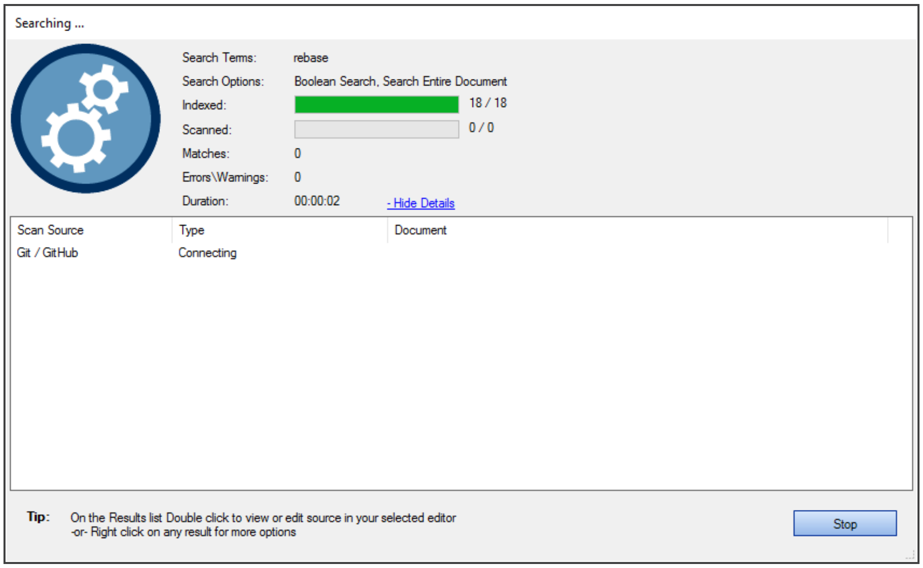
Once a search is launched, you can continue working on other programs while Find it EZ runs unattended in the back-ground. While a search is running, you can not minimize the Find it EZ program or use any other window in Find it EZ as the search dialog box keeps focus until completed or cancelled. However,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

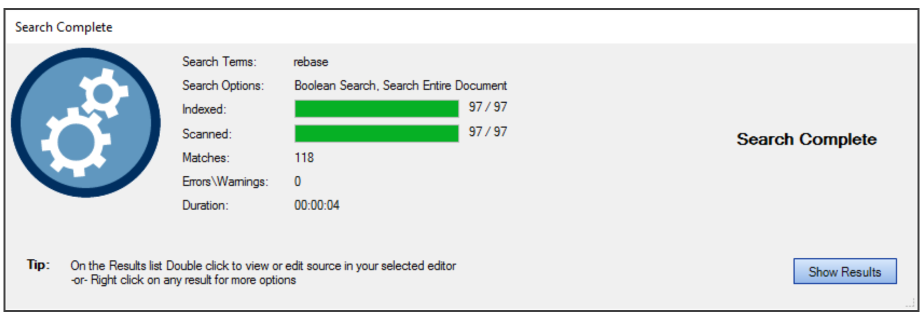


To hide details, click on the **- Hide Details** link.

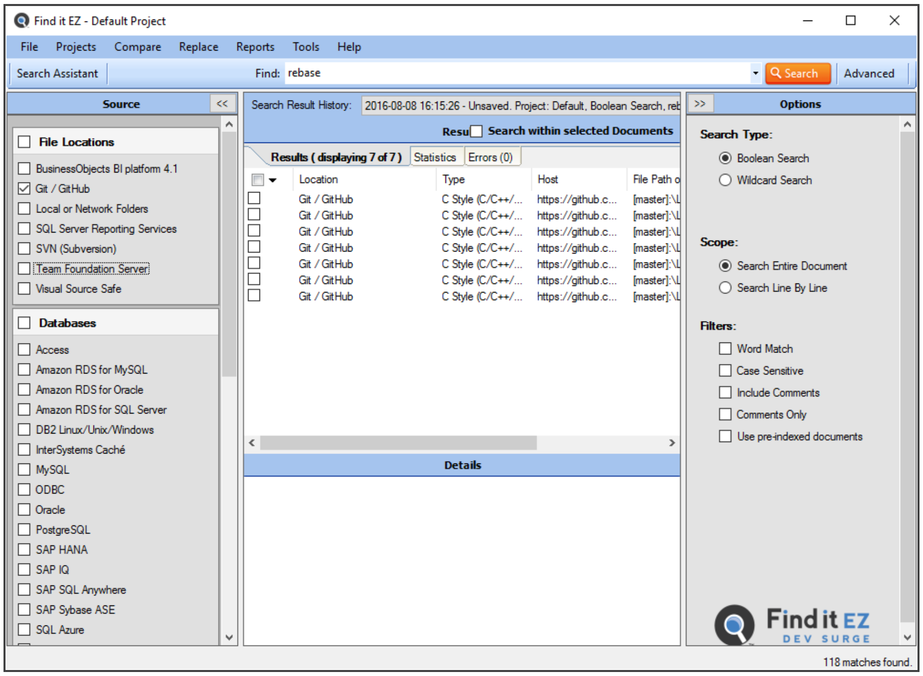
Show Search Results

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

To view results, click on the **Show Results** button.

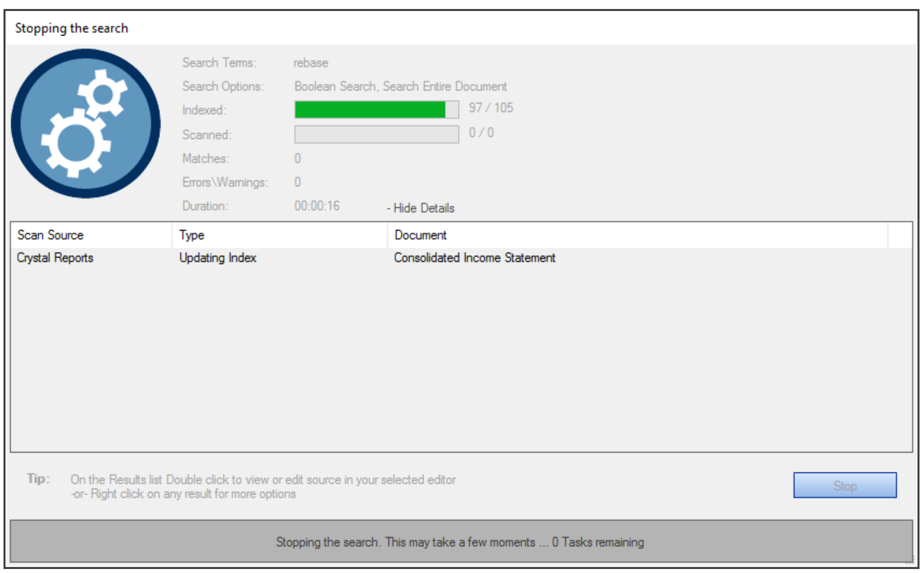


The results will appear listed in the **Results** window. See example below:



Stop Searching

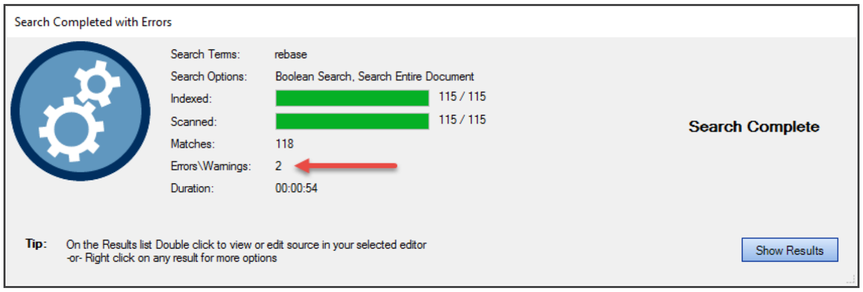
To cancel a search in progress, click on the **Stop** button. A notification will appear at the bottom of the dialog. See example below:



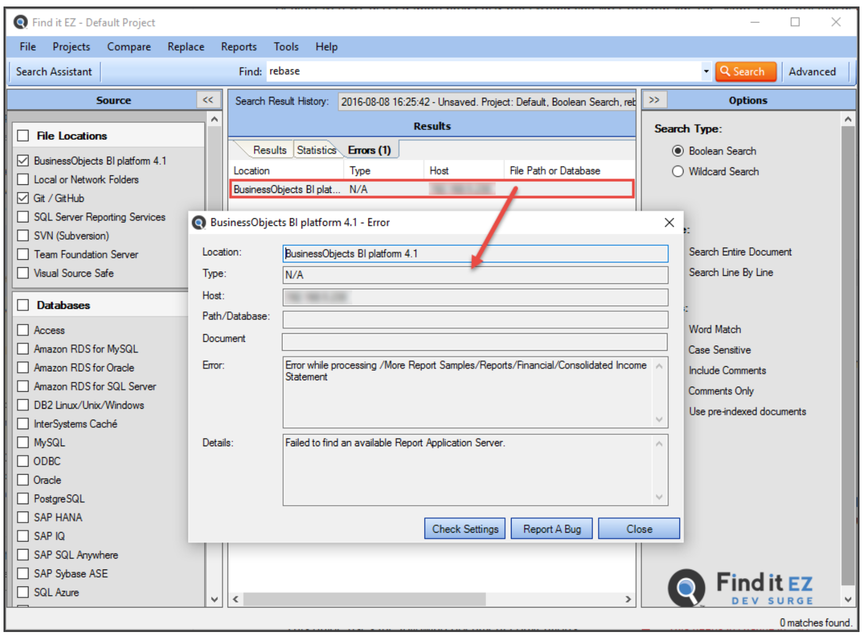
View Search Errors

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

1. Note the error count on the **Search Completed with Errors** dialog. See example below:



2. Click on the **Show Results** button.
3. In the **Results** window, click on the **Errors** tab.
4. Locate the error for which you want to view details and double-click on the row. Or, right-click and select **View Error** from the context menu. An error details dialog will appear. See example below:



5. Review details of the error.
6. To check your project settings, click on the **Check Settings** button.
7. To report a bug, click on the **Report A Bug** button.
8. To close the error details dialog, click on the **Close** button.

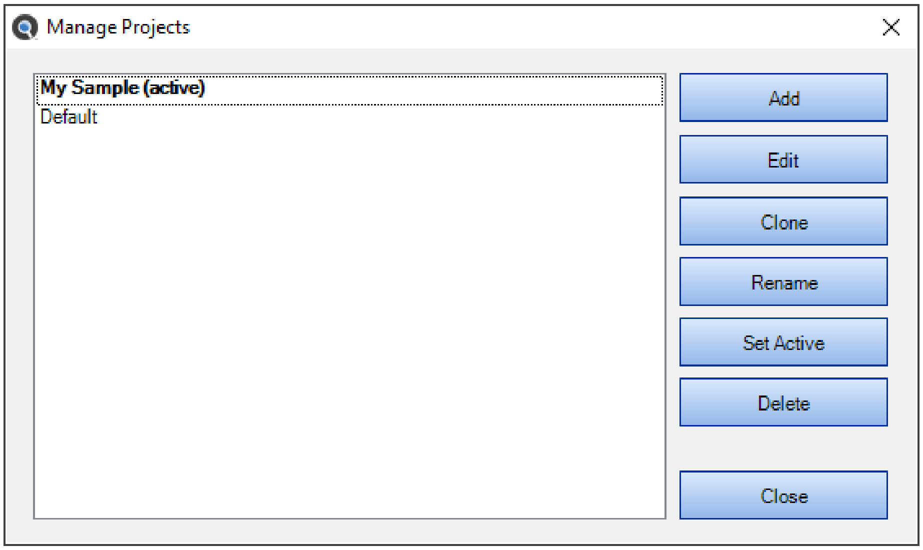
See Also:

- "Work With Search Results" on page 97
- "Search Locations and Source Settings" on page 75
- "Find it EZ Support" on page 162

Projects

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

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



Add a New Project

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

Edit a Project

1. 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.

Switch Between Projects

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

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

Clone a Project

1. Click to select the project you want to clone (i.e. copy all settings).
2. Click on the **Clone** button. A pop-up will appear.
3. Enter a different name for the new, cloned project.
4. Click on the **OK** button. The cloned project will be added to the list.
5. To close the **Manage Projects** dialog box, click on the **Close** button.

Rename a Project

1. Click to select the project of which you want to change the name.
2. Click on the **Rename** button. A pop-up will appear.
3. Change the name, as desired.
4. Click on the **OK** button. The renamed project will appear in the list.
5. To close the **Manage Projects** dialog box, click on the **Close** button.

Set Active Project

1. 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.

Delete a Project

1. 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.

See Also:

- "Local or Network Folders" below
- "Repositories" on page 78
- "Databases" on page 132
- "Programming Languages" on page 92
- "Documents" on page 94
- "Report Utilities" on page 95

Search Locations and Source Settings

This section provides detailed instructions to configure project settings for **Location** (local or network folders, repositories, data-bases) and **File Type** (programming languages, documents, report utilities) sources and to view/hide or apply project 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 scan source item** check-box.

See Also: "Set User Options" on page 21 (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.

Apply Project Settings
When you are done making changes to a source, click on the **Apply** button to apply the changes.

Location

This section provides detailed steps required to configure project settings for local or network folders, repositories, and databases.

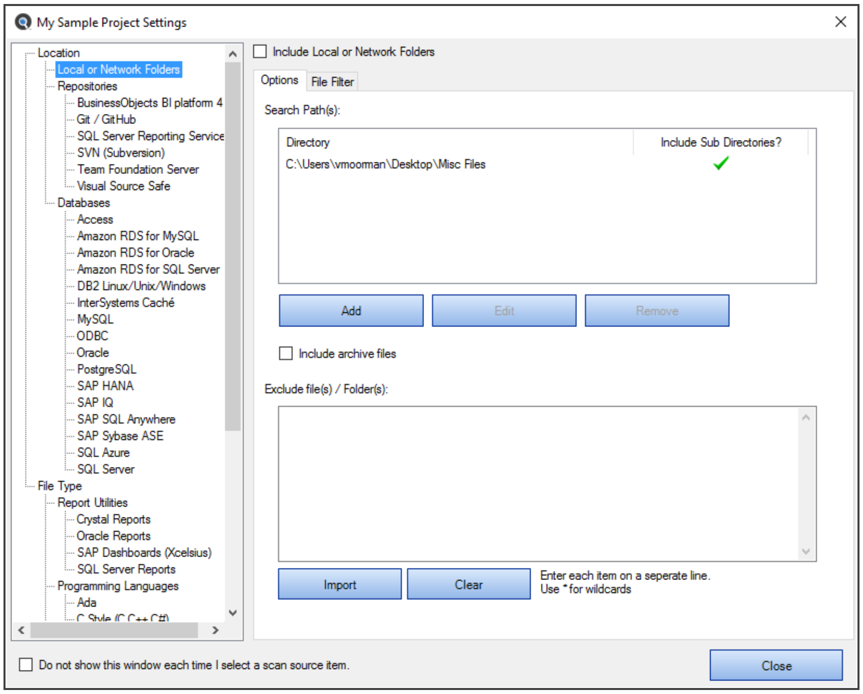
Local or Network Folders

This section describes the procedures required to include the local or network folders source in a search, add or edit search path(s), include/exclude archive files, exclude files or folders from the search, and to apply file filters.

To access project settings for local or network folders:

1. Edit the desired project. **See:** "Search Locations and Source Settings" above.
2. In the frame on the left, in the **Location** category, click to select **Local or Network Folders**. The following dialog box will

appear:



Include Source

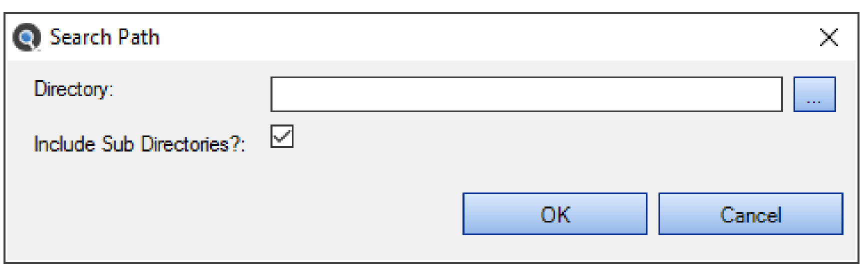
When a source is selected from the frame on the left, the **Include [Source Name]** check-box at the top of the dialog box is checked by default. To exclude the source from your search, click to un-check the check-box.

Note: If a source 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. **See:**"Local or Network Folders" on the previous page. The **Options** tab is selected by default.
2. In the **Search Path(s)** section, click on the **Add** button. A **Search Path** pop-up will appear, as below:



3. Click on the "**...**" button to the right of the **Directory** field. A **Select Folder** pop-up will appear.
   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.

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.

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

To edit a search path:

1. In the **Search Path(s)** list, click to highlight the search path you want to edit.
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 **Apply** button to apply your changes.

Include Archive Files

> **See:**"Local or Network Folders" on page 75.

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

"ARJ", "LZH", "LZMA", "RAR", "RPM", "7Z", "XZ", "BZ2", "BZ", "GZIP", "GZ", "TAR", "ZIP"

To include archive files in your Local or Network Folders search, locate and click to check the **Include Archive Files** check-box.

Exclude Files or Folders

To exclude specific files or folders from the selected directories (in the **Search Path(s)** list) in your Local or Network Folders search:

1. **See:** "Local or Network Folders" on page 75.
2. To import a list of files to exclude:
   a. In the **Exclude File(s) / Folders(s)** section, click on the **Import** button. An **Open** pop-up will appear.
   b. Navigate to and select the desired *.txt file.
   c. Click on the **Open** button. The contents of the selected file will appear in the **Exclude File(s) / Folder(s)** list.
   d. Click on the **Apply** button to apply your exclusions.

   AND / OR
3. To enter the path, file name, or wildcard to exclude:
   a. Click inside the **Exclude File(s) / Folder(s)** text box and enter the desired text to exclude.

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

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

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

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

Apply File Filter

To apply a file filter to a source search:

1. **See:**"Local or Network Folders" on page 75**. The Options tab is selected by default.**
2. **See:** "Repositories" below**. The Options tab is selected by default.**
3. Click to select the **File Filter** tab.
4. To include all files, click to choose the **Include all Files** option. This is the default selection.

   OR
5. To include only a subset of files, click to choose the **Only include this subset of Files** option.
6. To add a subset:
   a. Click on the **Add** button. An **Add Filter** pop-up will appear. The **Available Files** list will be populated with a list of files included in the folders selected previously on the **Options** tab.
   b. Click to select the desired file(s).

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

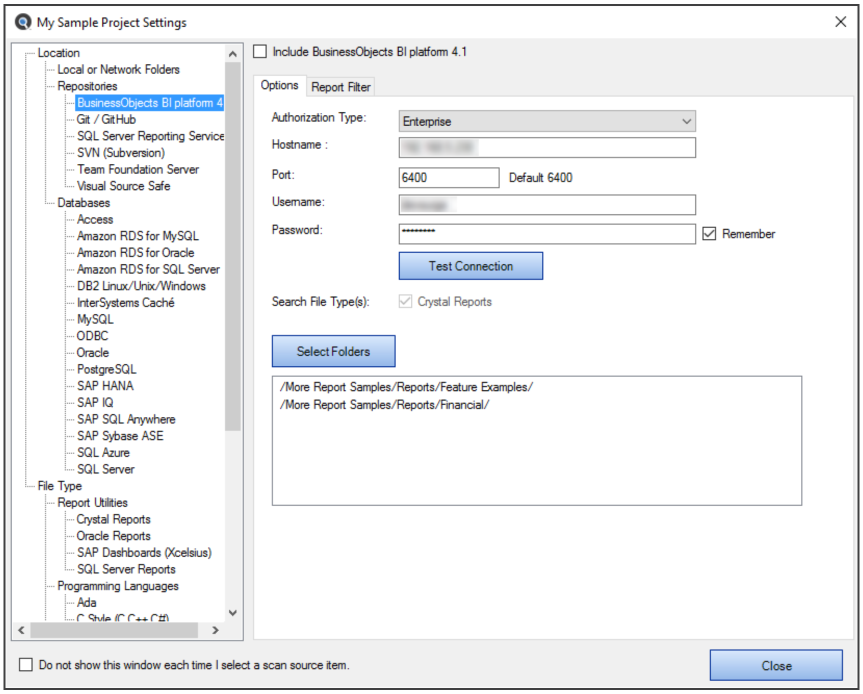
   c. To filter by file name, use the **Filename Filter**:
      i. Click inside the **Filename Filter** text box.
      ii. Enter the desired file name filter, using wildcards as desired (e.g. *.cs, *.js, *user*, etc.).
   d. Once complete, click on the **Add** button. The selected files will be added to the **Only include this subset of Files** list.
7. To paste a subset from the clipboard:
   a. Click on the **Paste** button. The item will be added to the **Only include this subset of Files** list.
8. 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.
9. Click on the **Apply** button to apply your changes.

Repositories

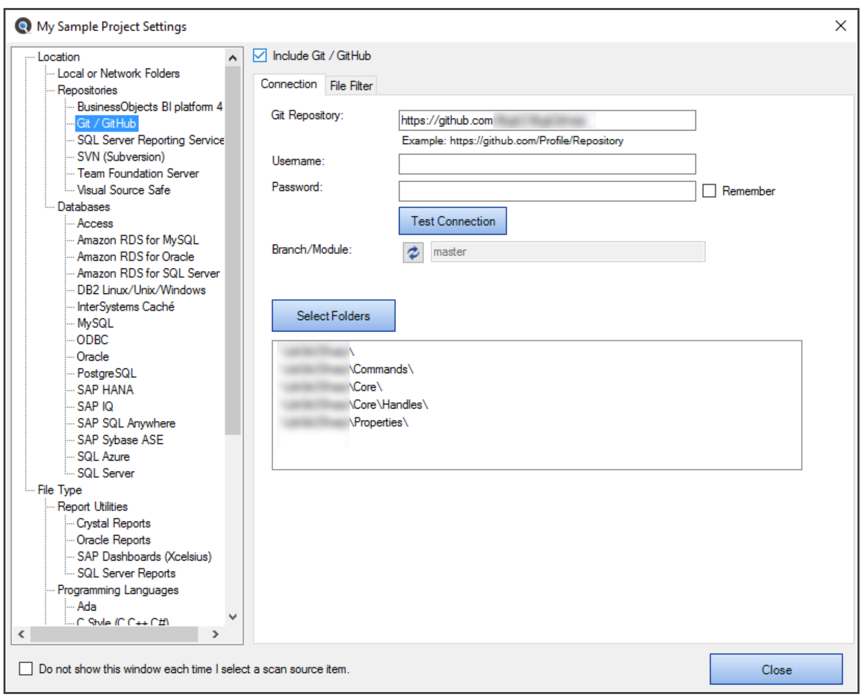
This section describes the procedures required to include the repositories source in a search, enter repository connection information, test a repository connection, select repository folders, and apply a report filter.

To access project settings for repositories:

1. Edit the desired project. **See:** "Search Locations and Source Settings" on page 75.
2. In the frame on the left, in the **Location** category, locate the **Repositories** sub category.
3. Click on the desired repository name. In the first example below, we have selected the **BusinessObjects BI platform 4.1** repository:



In the second example below, we have selected the **Git / GitHub** repository:



Connection Information - Repositories

1. **See:**"Repositories" on page 78.
2. For the selected repository, select and/or enter the required connection information. Depending upon the repository selected, these settings could include:
    - Authorization Name
    - Hostname
    - Port
    - Username
    - Password
    - Search File Type(s)
    - Git Repository
    - Branch / Module or Branch
    - Server URL or Server
    - Collection / Project or Project
3. To have Find it EZ remember your password, click to check the **Remember** check-box.
4. Click on the **Apply** button to apply your changes.

Test Repository Connection

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

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

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.

Select Repository Folders

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

1. Once connected, a **Select Folder** pop-up will appear, showing a list of all folders included in the selected repository.
2. To show empty folders, click to check the **Show empty folders** check-box.
3. Select the desired folder(s) or sub-folder(s) by clicking to check the check-box preceding the desired folder(s).
4. Once selections have been made, click on the **OK** button. The selected folder(s) will appear in the folders list.

Apply Report Filter

To apply a report filter to a Repository search:

1. **See:**"Repositories" on page 78. The **Options** tab is selected by default.
2. Click to select the **Report Filter** tab.
3. To include all reports, click to choose the **Include all Reports** option. This is the default selection.

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

5. To add a subset:
    a. Click on the **Add** button. An **Add Filter** pop-up will appear. The **Available Reports** list will be populated with a list of reports included in the previously selected folder(s) (on the **Options** tab).
    b. Click to select the desired report(s).

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

    OR
    c. Use the **Filename Filter** to... ?
    d. Once complete, click on the **Add** button. The selected reports will be added to the **Only include this subset of Reports** list.
6. To paste a subset from the clipboard:
    a. Click on the **Paste** button. The item will be added to the **Only include this subset of Reports** list.
7. To remove report(s):
    a. To remove all reports from the list, click on the **Remove All** button.
    b. To remove selected report(s) from the list, click to highlight the reports you want to remove, then click on the **Remove** button.
8. Click on the **Apply** button to apply your changes.

See Also:

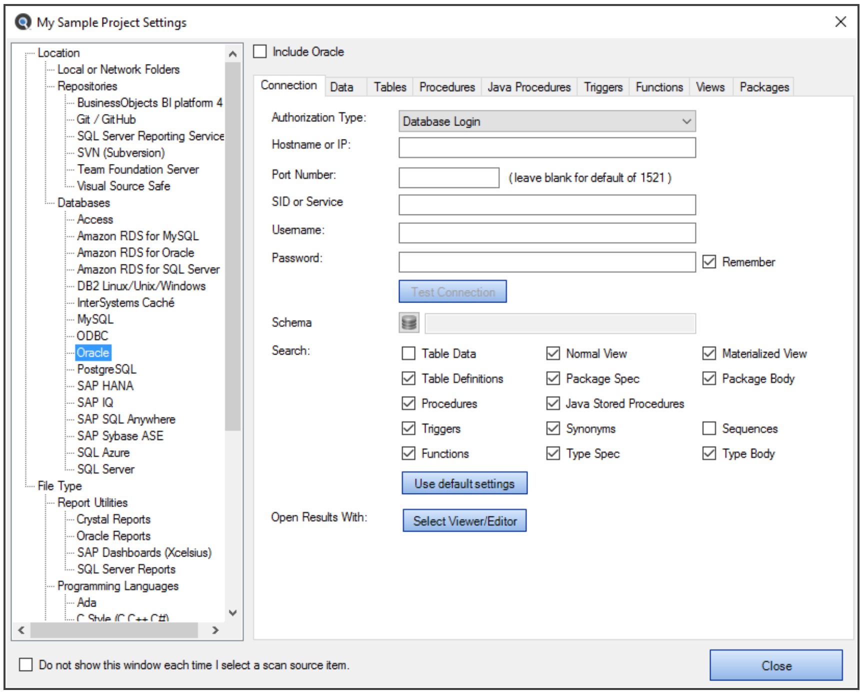
- "Include Source" on page 76
- "Apply File Filter" on page 77

Databases

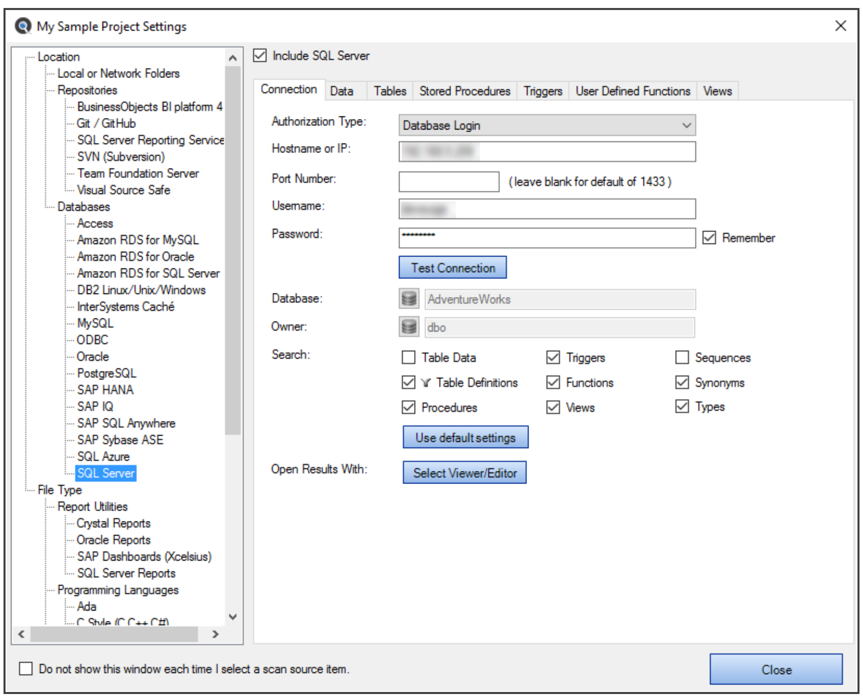
This section describes the procedures required to include the databases source in a search, enter database connection information, test a database connection, reset search defaults, open results with the desired viewer/editor, and apply various database search filters.

To access project settings for databases:

1. Edit the desired project. **See:** "Search Locations and Source Settings" on page 75.
2. In the frame on the left, in the **Location** category, locate the **Databases** sub category.
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. **See:** "Databases" on page 81.
2. 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
3. To have Find it EZ remember your password, click to check the **Remember** check-box.
4. Click on the **Apply** 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.
2. If the test is successful, you will receive a "A connection was made successfully!" message.

> **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.

Reset Search Defaults

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

To restore the selections to the default settings that came with your Find it EZ install, click on the **Reset search defaults** button.

Open Results With

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

Apply Database Search 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

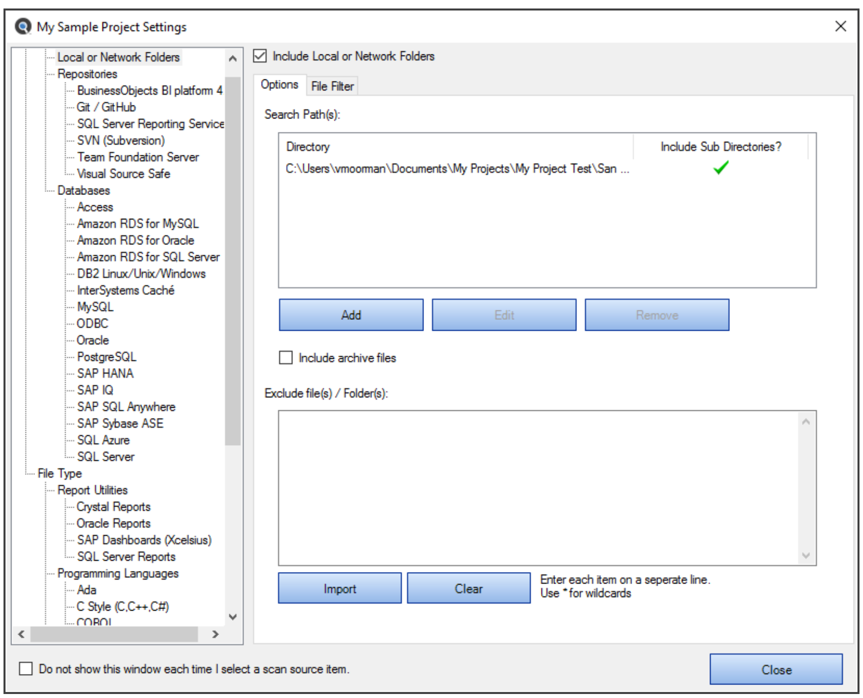
Click on the desired filter tab (see links below).

See Also:

- "Apply File Filter" on page 77
- "Viewer / Editor Settings" on page 28
- "Report Utilities" on page 95

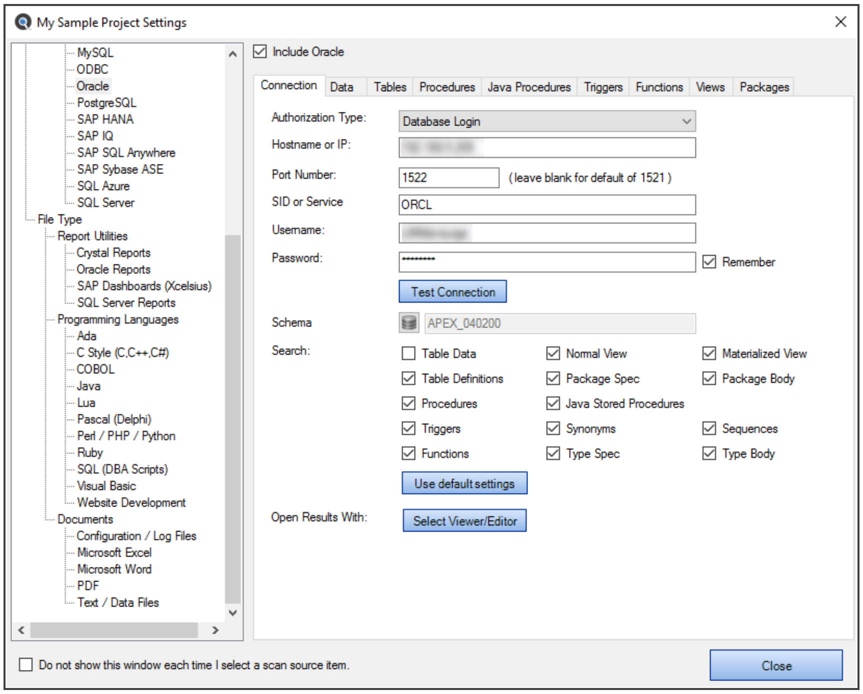
Search an Oracle Database

1. From the **Source** frame on the left, locate the **File Locations** category.
2. Click to check the desired file location. The **Project Settings** dialog will appear.
3. Configure settings. See Local or Network Folders example below:



4. From the **Source** frame on the left, click to check **Oracle** in the **Databases** category.

5. Configure settings. See example below:

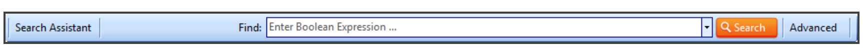


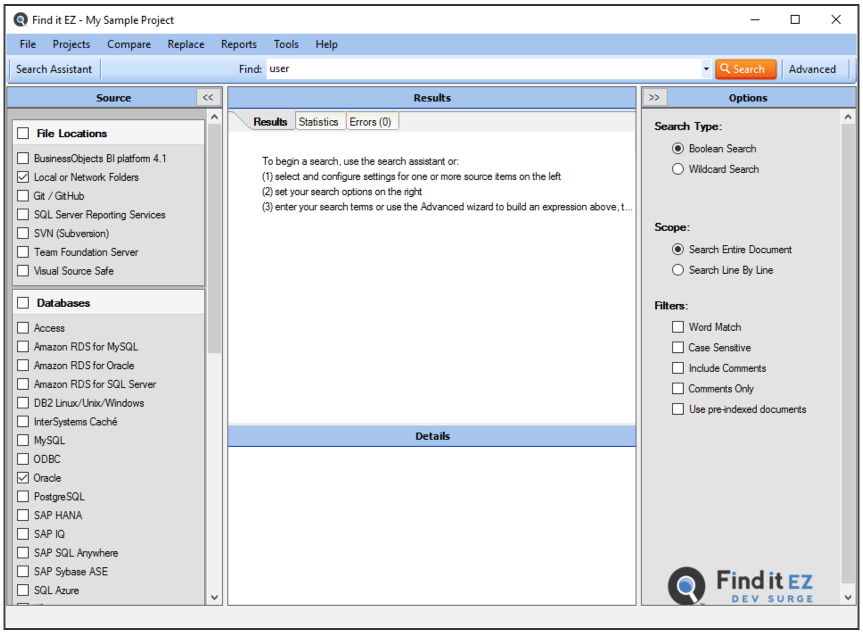
6. From the **Options** frame on the right, choose the desired **Search Type** and **Scope**, and select the desired **Filters**.

Note: Default search **Options** are: **Search Type** = Boolean Search, **Scope** = Search Entire Document, **Filters** = None. Search options can be changed for 'on start-up' or 'new project' search to use this default or to remember your last used settings.

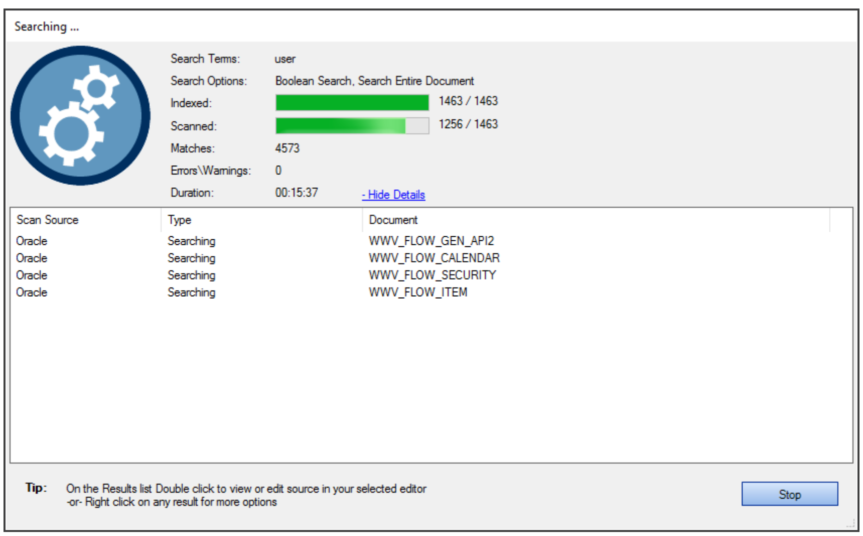
Tip: For better search performance, click to check the Use pre-indexed documents in **Filters**. This will use the last indexed document content and therefore will not refresh content with latest updates. Use this filter if it is known that the source documents are changed infrequently or have not changed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

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

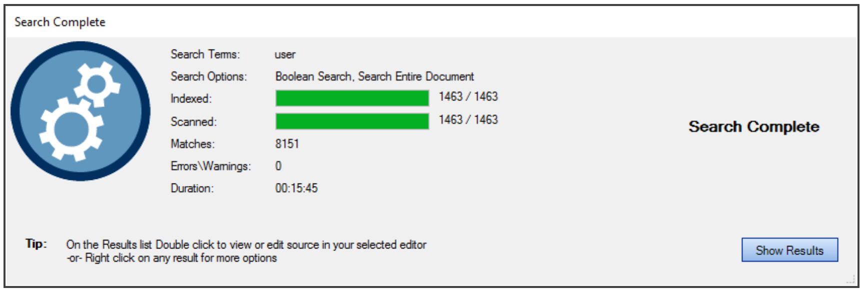




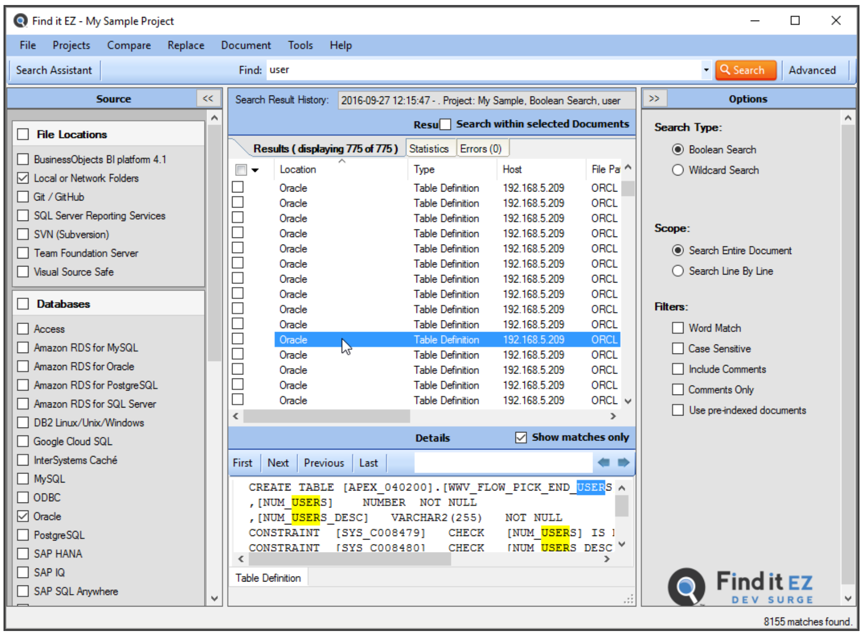
8. Click on the **Search** button to initiate the search. A **Searching** dialog box will appear, showing the status of the search. See example below:



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



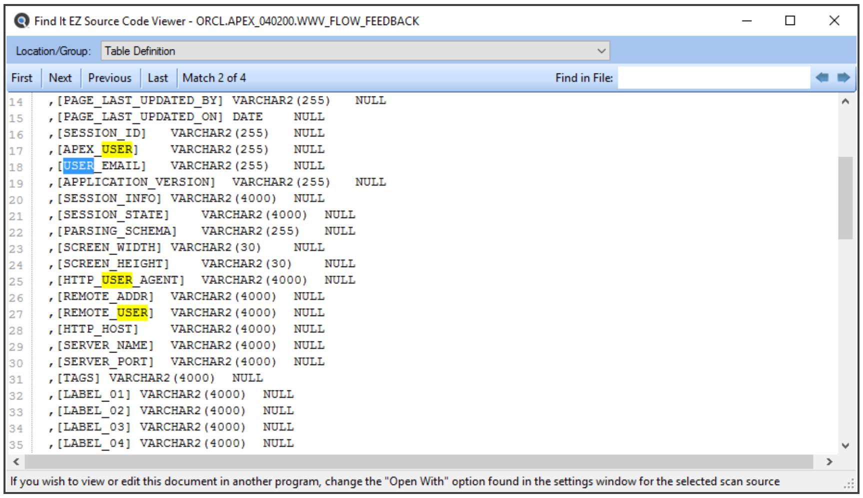
10. Click on the **Show Results** button. A list of results matching your search criteria will appear in the **Results** frame. See example below:



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

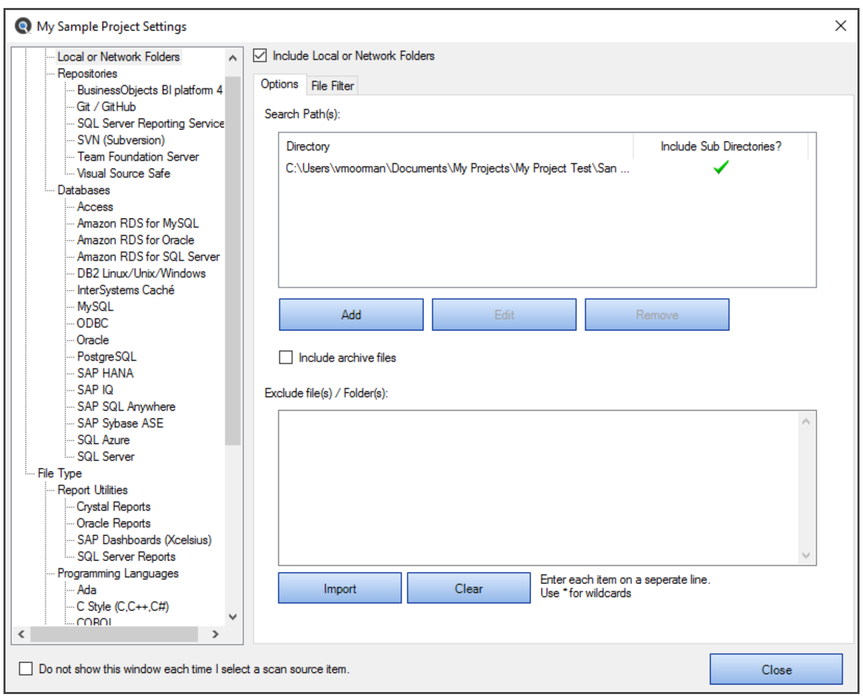
11. To view details for a result, click on a row in the **Results** window. Details will appear in the **Details** window.

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



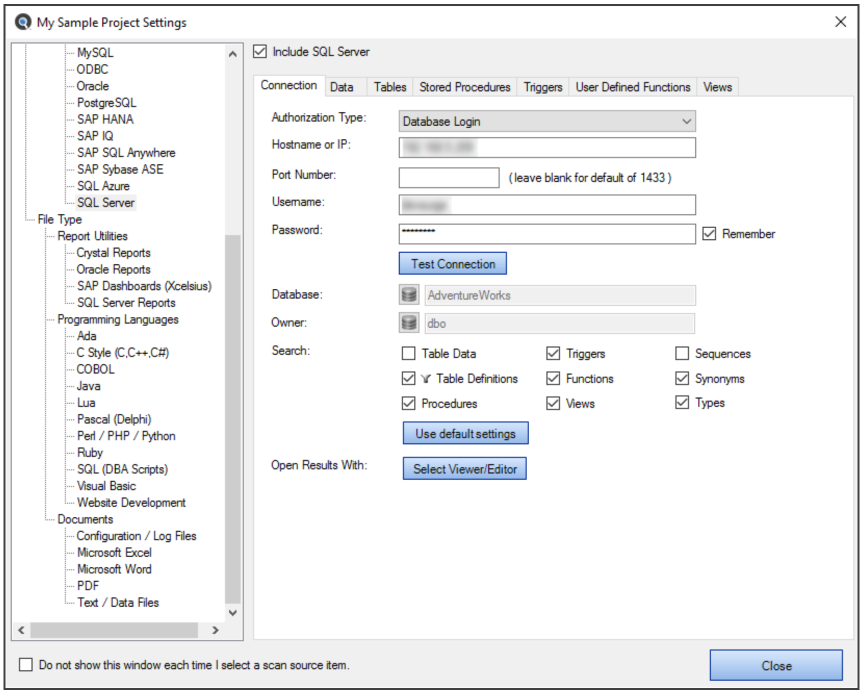
Search a SQL Server Database

1. From the **Source** frame on the left, locate the **File Locations** category.
2. Click to check the desired file location. The **Project Settings** dialog will appear.
3. Configure settings. See Local or Network Folders example below:



4. From the **Source** frame on the left, click to check **SQL Server** in the **Databases** category.

5. Configure settings. See example below:

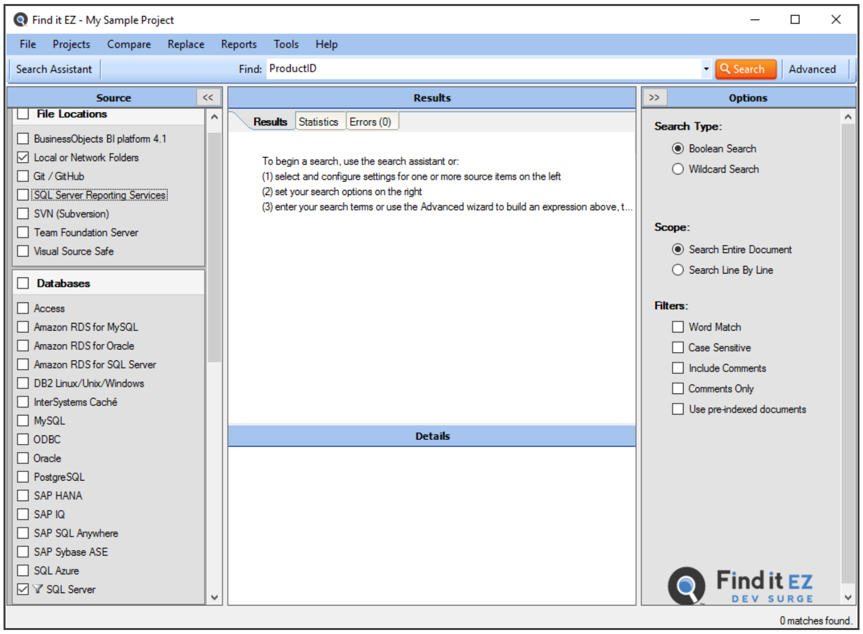


6. From the **Options** frame on the right, choose the desired **Search Type** and **Scope**, and select the desired **Filters**.

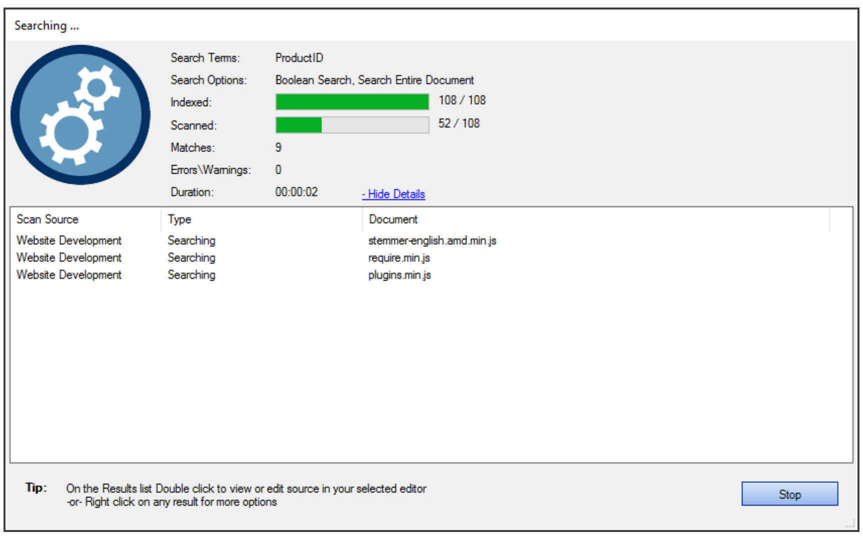
> **Note:** Default search **Options** are: **Search Type** = Boolean Search, **Scope** = Search Entire Document, **Filters** = None. Search options can be changed for 'on start-up' or 'new project' search to use this default or to remember your last used settings.

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

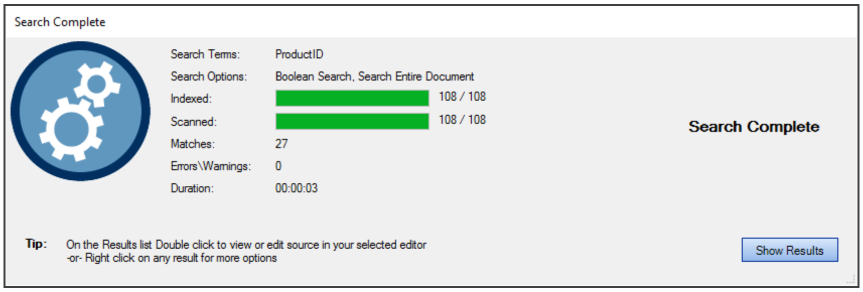
7. On the search bar (see image below), enter the desired search text into the **Find** text box.



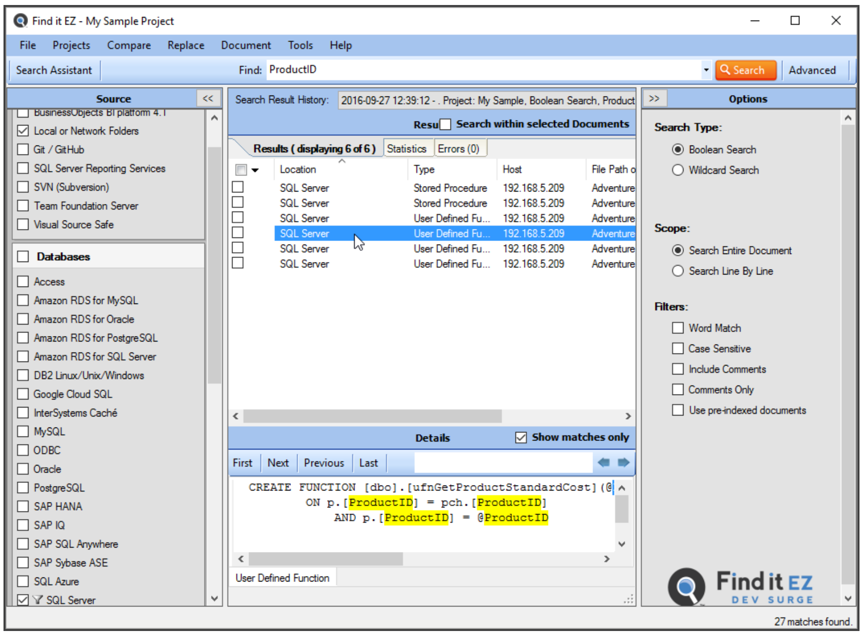
8. Click on the **Search** button to initiate the search. A **Searching** dialog box will appear, showing the status of the search. See example below:



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



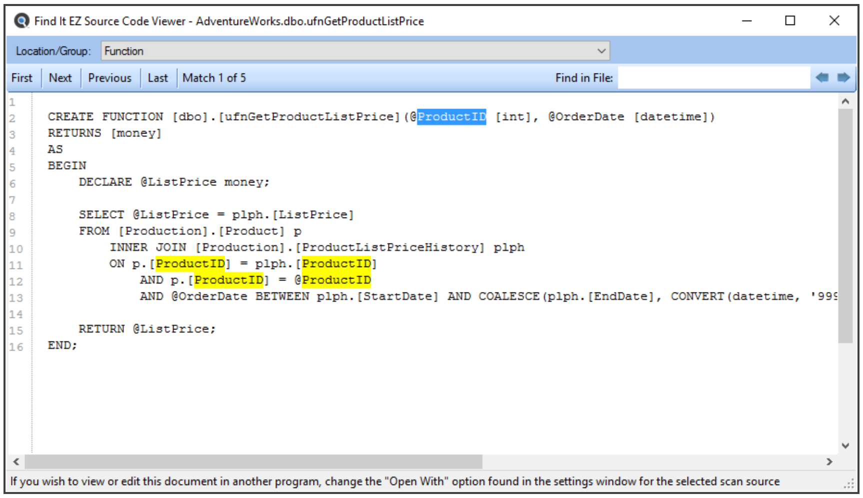
10. Click on the **Show Results** button. A list of results matching your search criteria will appear in the **Results** frame. See example below:



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

11. To view details for a result, click on a row in the **Results** window. Details will appear in the **Details** window.

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



See Also:

- "Product Overview" on page 12
- "Set User Options" on page 21
- "Use the Expression Builder" on page 65
- "Searching Window" on page 68
- "Work With Search Results" on page 97
- "Save Search Results" on page 107
- "Include Source" on page 1

File Type

This section provides detailed steps required to configure project settings for programming languages, documents, and report utilities.

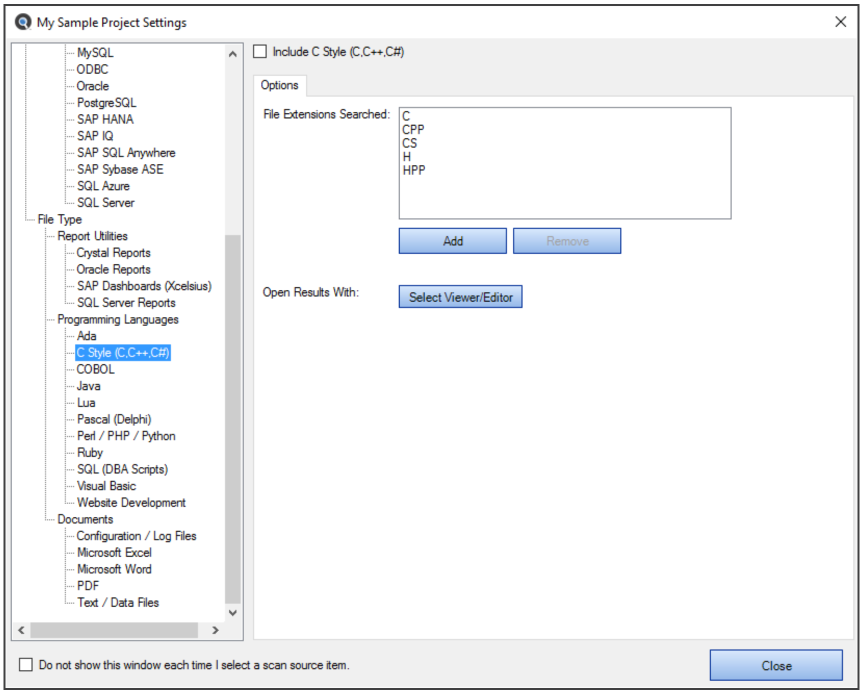
Programming Languages

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

To access project settings for programming languages:

1. Edit the desired project. **See:** "Search Locations and Source Settings" on page 75.
2. In the frame on the left, in the **File Type** category, locate the **Programming Languages** sub category.
3. Click on the desired programming language. In the example below, we have selected the **C Style (C,C++,C#)** pro-

gramming language:



Add or Remove File Extensions Searched

1. In the desired project, locate and select the source item for which you want to edit file extensions searched.
2. See one of the following:
   - "Programming Languages" on the previous page
   - "Documents" on the next page
   - "Report Utilities" on page 95
3. To add a file extension:
   a. Click on the **Add** button. A pop-up will appear.
   b. Enter the name of the new file extension (without the leading ".").
   c. Click on the **OK** button. The new file extension will be added to the **File Extensions Searched** list.
4. To remove a file extension:
   a. In the **File Extensions Searched** list, click to select the file extension you want to remove.
   b. Click on the **Remove** button. The selected file extension will be removed from the list.
5. To apply your changes to the selected source, click on the **Apply** button.

See Also:

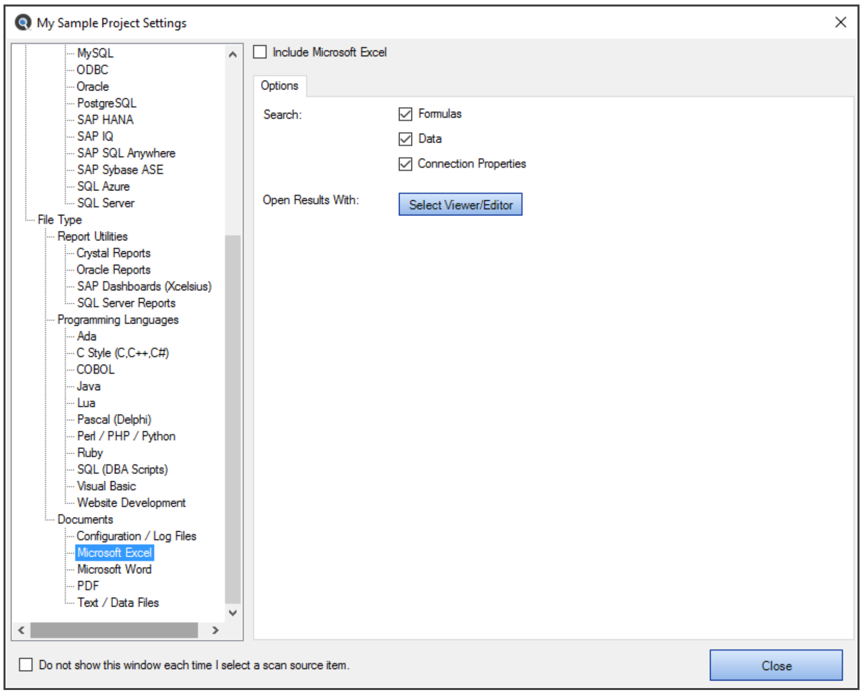
- "Include Source" on page 76
- "Open Results With" on page 134

Documents

This section describes the procedures required to include the documents source in a search, add or remove file extensions searched, open results with the desired viewer/editor, and select Microsoft Excel search options (where applicable).

To access project settings for documents:

1. Edit the desired project. **See:** "Search Locations and Source Settings" on page 75.
2. In the frame on the left, in the **File Type** category, locate the **Documents** 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:

- Formulas
- Data
- Connection Properties

To include these items in the search, click to check the preceding check-box (un-check to exclude).

See Also:

- "Include Source" on page 76
- "Add or Remove File Extensions Searched" on the previous page
- "Open Results With" on page 134

Report Utilities

This section describes the procedures required to include the report utilities source in a search, add or remove file extensions searched, reset search defaults, download optional connectors, and open results with the desired viewer/editor.

To access project settings for report utilities:

1. Edit the desired project. **See:** "Search Locations and Source Settings" on page 75.
2. In the frame on the left, in the **File Type** category, locate the **Report Utilities** sub category.
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 project settings for a report utility are similar to other file type sources. Refer to the links below for detailed instructions.

See Also:

- "Include Source" on page 76.
- "Download Connectors" on page 167
- "Add or Remove File Extensions Searched" on page 93
- "Reset Search Defaults" on page 134
- "Open Results With" on page 134

Reduce False Positive Matches

** PLEASE PROVIDE YOUR DEFINITION OF FALSE POSITIVE MATCHES HERE, AND LIST THE BENEFITS OF REDUCING THEM.

False positive matches can be significantly reduced using the following methods:

See:

- "Exclude Files or Folders" on page 77
- "Select Repository Folders" on page 80
- "Apply Report Filter" on page 80 and "Apply File Filter" on page 77; note that the latter instructions also apply to database filters (data, tables, stored procedures, triggers, etc.).
- "Perform a Regular Search" on page 60; note the settings available in the **Options** section - **Filters** category.
- The following sources allow you to limit a search by selecting specific **Search** data via **Project Settings**: Databases, Documents (Microsoft Excel), and Report Utilities. Click to select only those source locations or data types that you need to search. See links below.

See Also:

- "Databases" on page 132
- "Documents" on page 94
- "Report Utilities" on the previous page
- "Reset Search Defaults" on page 134

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:
    - See: "Search Wizard" on page 31
    - "Perform a Regular Search" on page 60
    - "Use the Expression Builder" on page 65
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:

- "View Result Statistics" on page 101
- "View Result Errors" on page 101
- "View Search Result Details" on page 101

View Search Result History

To view previous (unsaved) search results:

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.

See Also:

- "Save Search Results" on page 107

View Result Source

Open Result

1. "View Search Results" above.
2. To open the result:
    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.
3. The result will open in the pre-selected viewer/editor depending upon the type.

See Also:

- "Viewer / Editor Settings" on page 28

Find it EZ Result Viewer

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

Open Find it EZ Result Viewer

If "Find it EZ Viewer" is selected for the source **Category Default** or **By Source Item** in "Viewer / Editor Settings" on page 28, then when you "View Result Source" on the previous page, it will appear in the Find it EZ Result Viewer. Text matching your search criteria (i.e. matches) is highlighted in yellow.

Change Location or Group

Groups in Find it EZ are locations within a document. For example, in PDF and Crystal Reports there is a group for each page. Use the **Location/Group** drop-down list to select the place in the document for which you want to view matches.

Navigate Search Results

1. **See:** "Open Find it EZ Result Viewer" above
2. 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."

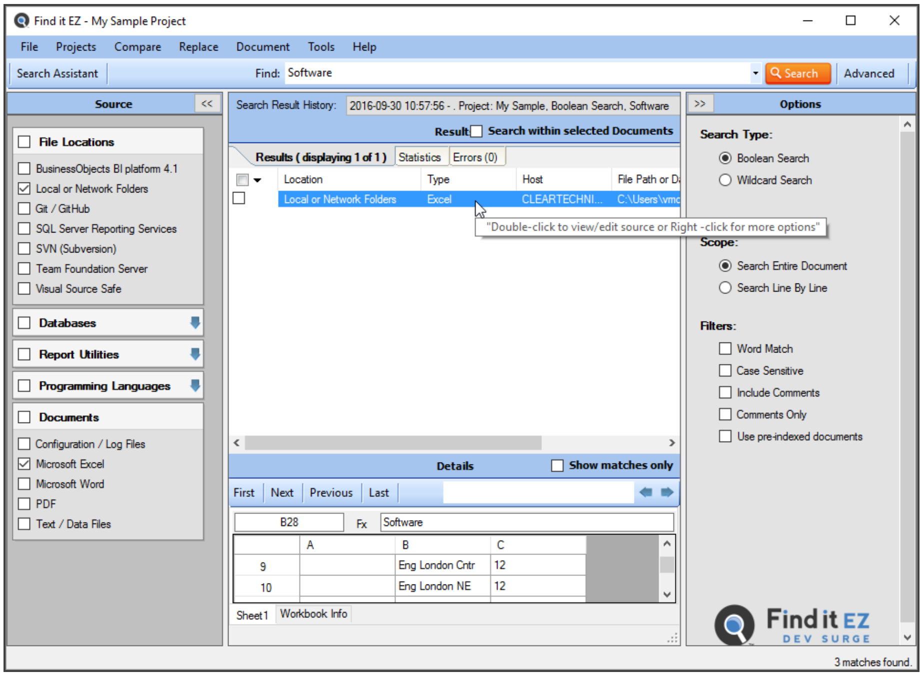
Find in File

1. "Open Find it EZ Result Viewer" above
2. To search within the result document:
   a. Enter the desired search text into the **Find in File** text box.
   b. Click on the left arrow (find previous) or right arrow (find next) button. OR, press the **[Enter]** key on your keyboard to 'find next.'
   c. 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

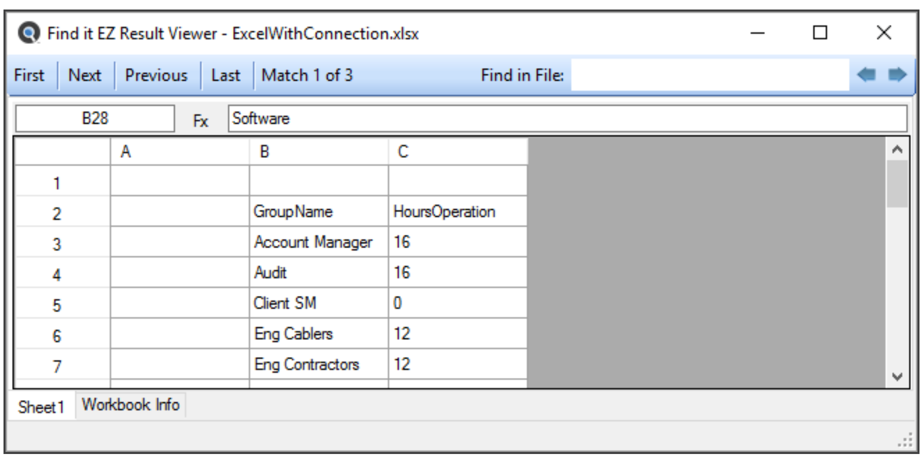
The Find it EZ**Result Viewer** for some documents will contain multiple tabs. For an Excel workbook, there is one tab per worksheet (e.g. **Sheet 1**) plus a tab for workbook details (**Workbook Info**; including database connections, etc.). For other documents, you normally only have a single tab with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

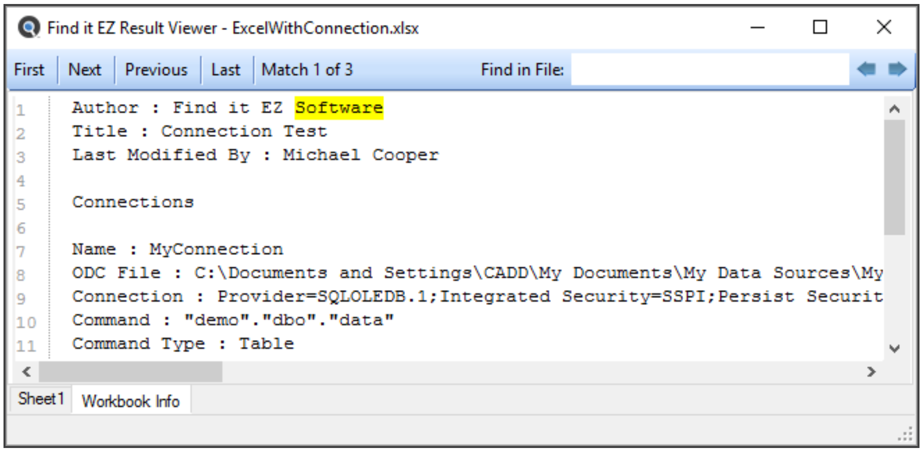


To open the Find it EZ **Result Viewer**, right-click on the workbook in the **Details** panel and select **Open** from the context menu. Or, double-click on the workbook.

Result Viewer Tabs:



Workbook Info tab:



See Also:

- "Open Results With" on page 134
- "Viewer / Editor Settings" on page 28

Select All Results or None

1. "View Search Results" on page 97.
2. In the header of the check-box column, click on the down arrow button. A context menu will appear.
3. To select all results:
   - From the menu, choose **Select - All**. All results will be selected (checked).
4. To de-select all results:
   - From the menu, choose **Select - None**. All check-boxes will be cleared.

Search for All Checked Objects

1. "View Search Results" on page 97.
2. In the check-box column, click to select (check) the result objects for which you want to search your project for references.
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 **Search for all checked objects**. A **Continue** notification message will appear.
5. To launch the search, click on the **OK** button. The search will proceed, and any results will appear in the **Results** window.

   OR
6. To cancel, click on the **Cancel** button.

See Also:

- "Select All Results or None" above
- "Save Search Results" on page 107

Open Viewer and Editor Settings

To access project settings from the **Results** window:

1. "View Search Results" on page 97.
2. In the **Results** window, right-click on any result. A context menu will appear.
3. From the menu, click to select **Settings**. The **Configure Viewer/Editor Settings** pop-up will appear.

See Also:

- "Viewer / Editor Settings" on page 28r"Viewer / Editor Settings" on page 28
- "Open Results With" on page 134

Search Within Result Documents

1. "View Search Results" on page 97.
2. At the top of the **Results** window, click to check the **Search within Documents** check-box.
3. On the search bar, enter the desired search text into the **Find** text box.
4. Click on the **Search** button to initiate the search. A **Searching** dialog box will appear, showing the status of the search.
5. Once complete, the **Search Complete** dialog box will appear.
6. Click on the **Show Results** button. A list of results matching your search criteria will appear in the **Results** frame.

View Result Statistics

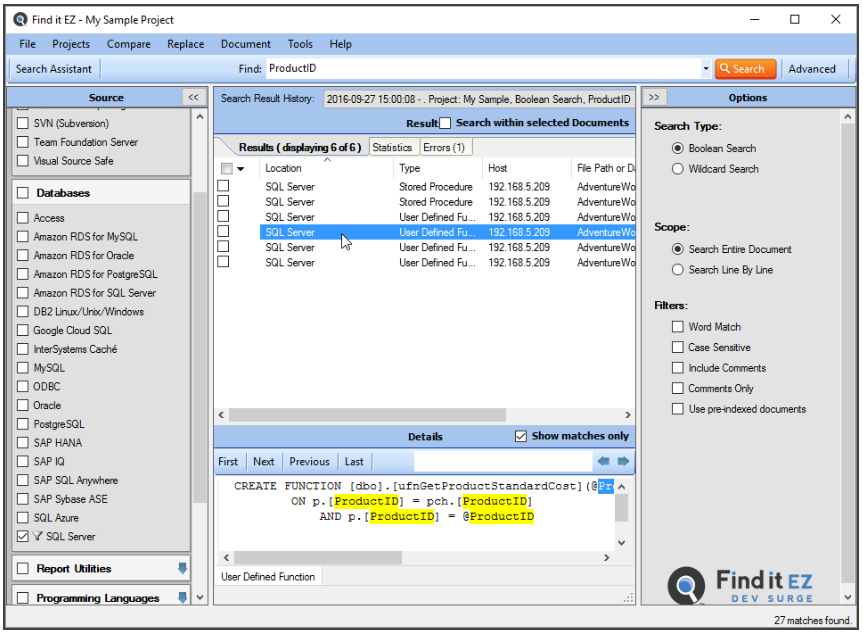
1. "View Search Results" on page 97.
2. In the **Results** window, click on the **Statistics** tab. Use the horizontal scroll bar located at the bottom of the window to view all data columns; Location, Type, Documents, Matches.

View Result Errors

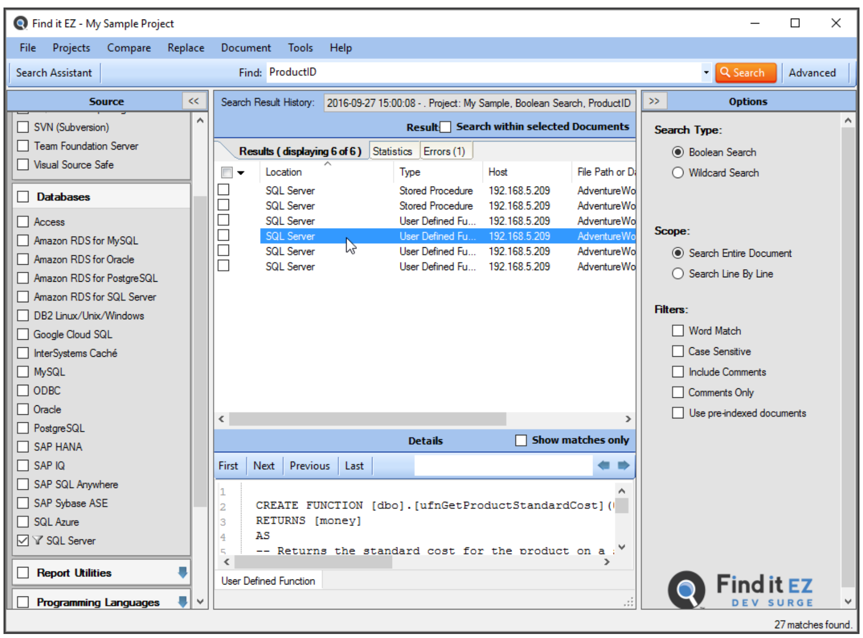
1. "View Search Results" on page 97.
2. In the **Results** window, click on the **Errors** tab. Use the horizontal scroll bar located at the bottom of the window to view all data columns; Location, Type, Host, File Path or Database, Document.

View Search Result Details

1. "View Search Results" on page 97.
2. In the **Results** window, click on the result for which you want to view details.



The image below has the **Show matches only** option checked:



- Details will appear in the **Details** window located below the **Results** window.
- Details will be grouped by source (e.g. Code, Document, etc.) and a context line will be shown for each match instance. See first image 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 second image above. 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).

View Source via Result Details

1. "View Search Result Details" on page 101.
2. Right-click on the selected result detail and select **Open** from the context menu.
3. The matching result will open in the selected viewer/editor. If using the Find it EZ**Result Viewer**:
    - The text matching the search criteria for the selected instance will be highlighted in blue
    - All other instances matching the search criteria will be highlighted in yellow

Copy Detail Item to Clipboard

1. "View Search Result Details" on page 101.
2. Locate the matching instance line that you want to copy to the clipboard.
3. Right-click on the selected line. A context menu will appear.
4. From the menu, select **Copy**. The selected line will be copied to the clipboard.
5. Paste the copied text to the desired location.

See Also:

- "Set User Options" on page 1
- "Viewer / Editor Settings" on page 28
- "Find it EZ Result Viewer" on page 98

Copy Search Results

This section describes the steps required to copy an object name to the clipboard, add an object name to the Boolean search term, or replace the Boolean search term.

Copy Object Name to Clipboard

1. "View Search Results" on page 97.
2. In the **Results** list, locate the file of which you want to copy the object name to the clipboard.
3. Right-click on the file. A context menu will appear.
4. From the menu, select **Copy Object Name**. The name of the selected file object will be added to the clipboard.
5. Paste the object name to the desired location.

Add Object Name to Boolean Search Term

1. "View Search Results" on page 97.
2. In the **Results** list, locate the file of which you want to add the object name to the Boolean search term.
3. Right-click on the file. A context menu will appear.

4. 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).

Replace Boolean Search Term

1. "View Search Results" on page 97.
2. In the **Results** list, locate the file having the object name with which you want to replace the Boolean search term.
3. Right-click on the file. A context menu will appear.
4. From the menu, select **Replace Search Term** .The name of the selected file object will replace any existing search term in the **Find** text box (on the search bar).

See Also:

- "Find it EZ Custom Boolean Syntax" on page 66

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.

Mark Item(s) Complete or Incomplete

1. "View Search Results" on page 97.
2. In the **Results** window, locate the result you want to mark complete or incomplete.
3. Right-click on the result row. A context menu will appear.
4. 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. "View Search Results" on page 97.
2. In the check-box column, click to select the results you want to mark complete or incomplete.
3. In the header of the check-box column, click on the down arrow button. A context menu will appear.
4. To mark the selected results complete, select **Mark all checked as completed** from the menu.

   OR
5. To mark the selected results incomplete, select **Mark all checked as incomplete** from the menu.

   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 all results that have been marked completed:

1. "View Search Results" on page 97.
2. In the header of the check-box column, click on the down arrow button. A context menu will appear.
3. 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 100
- "Save Search Results" on page 107

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.

Add Annotation

1. "View Search Results" on page 97
2. In the **Results** window, locate the result to which you want to add an annotation.
3. Right-click on the result row. A context menu will appear.
4. From the menu, select **Annotations**. An **Add/Edit Annotations** pop-up will appear.
5. 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).
6. In the **Comments** text box, enter the desired annotation.
7. Click on the **Save** button to save your note and close the **Add/Edit Annotations** pop-up. A clipboard icon will appear in the **Results** window preceding each result with an annotation.

   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.

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

View Annotations

1. "View Search Results" on page 97
2. In the **Results** window, locate the result for which you want to view annotations.

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

3. Right-click on the result row. A context menu will appear.
4. From the menu, select **Annotations**. An **Add/Edit Annotations** pop-up will appear. Details for the most recent annotation will be shown by default in the lower section of the pop-up. To view another annotation, click to select the desired row (e.g. by **Date** or **Entered by**) from the list in the upper section.

Edit Annotation

1. **See:**"View Annotations" above.
2. For the selected annotation, make the desired changes in the **Comments** text box.
3. Click on the **Save** button to save. A new, dated entry will be generated to include the changes.
4. To discard your changes, click on the **Cancel** button.

Delete Annotation

1. "View Annotations" above
2. In the list of annotations, click to select the entry you want to delete.

3. Click on the **Delete** button. The selected annotation will be removed from the list.
4. To close the **Add/Edit Annotations** pop-up, click on the **X** button.

Select All Items with Annotations

1. "View Search Results" on page 97.
2. In the header of the check-box column, click on the down arrow button. A context menu will appear.
3. From the menu, choose **Select - items with annotations**. All results with annotations will be selected (checked).

See Also:

- "Save Search Results" on the facing page

Remove Item from Search Results

1. "View Search Results" on page 97
2. In the **Results** window, locate the result you want to remove from the list.
3. Right-click on the result row. A context menu will appear.
4. From the menu, select **Remove**. An **Are you sure?** confirmation message will appear.

   Tip: To prevent this pop-up from appearing the next time you remove a result, click to check the **Do not ask again** check-box.

5. To remove the selected item from the search results, click on the **Yes** button.

   OR

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

Remove All Checked Results

1. "View Search Results" on page 97.
2. In the check-box column, click to select (check) the results you want to remove.
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 **Remove all checked**. An **Are you sure?** confirmation message will appear.

   Tip: To prevent this pop-up from appearing the next time you remove a result, click to check the **Do not ask again** check-box.

5. To remove the selected items from the search results, click on the **Yes** button.

   OR

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

See Also:

- "Remove Item from Search Results" above

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 **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. "View Search Results" on page 97.
2. In the **Results** list, locate the file that you want to add to the current project's search exclusion list.
3. Right-click on the file. A context menu will appear.
4. From the menu, select **Add file to project exclusion list**. The selected file will be added to the **Exclude File(s) / Folder (s)** list in **Project Settings** for Local or Network Folders.

Add Multiple Files to Project Exclusion List

1. In the **Results** list, locate the files that you want to add to the current project's search exclusion list.
2. In the check-box column, click to select (check) the desired results.
3. In the header of the check-box column, click on the down arrow button. A context menu will appear.
4. From the menu, select **Add selected files to project exclusion list**. The selected files will be added to the **Exclude File (s) / Folder(s)** list in **Project Settings** for Local or Network Folders.

Remove an Item From the Project Exclusion List

See: "Exclude Files or Folders" on page 77

Save Search Results

1. Perform a search:
   - "Search Wizard" on page 31
   - "Perform a Regular Search" on page 60
   - "Use the Expression Builder" on page 65
2. From the Find it EZ menu, select **File -> Save**. A **Save Search Results** dialog box will appear.
3. In the **Name** text box, enter a descriptive name for the results.

   Alert: Database table data search results will not be saved.
4. 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**. An **Open Search Results** dialog box will appear.
2. 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.

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

See Also:

- "Add or Edit Annotations" on page 105
- "Mark Item(s) Complete or Incomplete" on page 104

Export Results

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

Export Search Results

1. Perform a search:

   - "Search Wizard" on page 31
   - "Perform a Regular Search" on page 60
   - "Use the Expression Builder" on page 65

2. From the Find it EZ menu, select **File -> Export -> Search Results List**. A **Select the items to include** pop-up will appear.
   a. Click to choose one of the options; **All results**, **Currently displayed results**, or **Checked results only**.
   b. Click on the **Next** button. A **Save As** dialog box will appear.
      i. Navigate to the destination folder.
      ii. Enter the desired **File name**.
      iii. Click on the **Save** button.
   c. A **Save Complete** pop-up will appear.
      i. To view the saved file, click on the **View Now** button. The file will open in the selected viewer (see below).

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

      ii. To close the **Save Complete** pop-up, click on the **Close** button.
3. Exported search results will contain the following data columns:
   - Source **Location**
   - File **Type**
   - **Host** Name
   - **File Path or Database**
   - **Document** Name

- Number of **Matches**
- **Annotations**

Export Search Result Details

1. Perform a search:
    - See: "Search Wizard" on page 31
    - "Perform a Regular Search" on page 60
    - "Use the Expression Builder" on page 65
2. To export selected details only:
    a. In the **Results** window, click on a result row. Details will appear in the **Details** window.
3. From the Find it EZ menu, select **File -> Export -> Search Results Detail**. A **Select the items to include** pop-up will appear.
    a. Click to choose one of the options; **All results**, **Currently displayed results**, or **Checked results only**.
    b. Click on the **Next** button. A **Save As** dialog box will appear.
        i. Navigate to the destination folder.
        ii. Enter the desired **File name**.
        iii. Click on the **Save** button.
    c. A **Save Complete** pop-up will appear.
        i. To view the saved file, click on the **View Now** button. The file will open in the selected viewer (see below).

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

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

1. Perform a search:
    - See: "Search Wizard" on page 31
    - "Perform a Regular Search" on page 60
    - "Use the Expression Builder" on page 65
2. From the Find it EZ menu, select **File -> Export -> MS Project Tasks**. A **Select the items to include** pop-up will appear.

a. Click to choose one of the options; **All results**, **Currently displayed results**, or **Checked results only**.
b. Click on the **Next** button. A **Save As** dialog box will appear.
   i. Navigate to the destination folder.
   ii. Enter the desired **File name**.
   iii. Click on the **Save** button.
c. A **Save Complete** pop-up will appear.
   i. To view the saved file, click on the **View Now** button. The file will open in the selected viewer (see below).

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

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

3. 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. See "Export MS Project Tasks" above.
2. Open Microsoft Project.
3. From the **File** menu, select **New**.
4. On the **New** page, click **New from Excel workbook**.
5. In the **Open** box, click the arrow next to **XML Format**, and pick **Excel Workbook**.
6. Locate and select the workbook you want to import, and click **Open**.
7. In the **Import Wizard**, click **Next** to get started, and follow the steps to complete the import.

Export Error List

1. Perform a search:
   - See: "Search Wizard" on page 31
   - "Perform a Regular Search" on page 60
   - "Use the Expression Builder" on page 65
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**. 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.
4. A **Save Complete** pop-up will appear.
   a. To view the saved file, click on the **View Now** button. The file will open in the selected viewer (see below).

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

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

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

See Also:

- "Work With Search Results" on page 97
- "Viewer / Editor Settings" on page 28
- "Set User Options" on page 1

Print Results

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

Print Search Results

1. Perform a search:
    - "Search Wizard" on page 31
    - "Perform a Regular Search" on page 60
    - "Use the Expression Builder" on page 65
2. From the Find it EZ menu, select **File -> Print -> Search Results List**. A **Select the items to include** pop-up will appear.
    a. Click to choose one of the options; **All results**, **Currently displayed results**, or **Checked results only**.
    b. Click on the **Next** button. A report containing the selected results will open in a new browser window and a browser **Print** dialog will be launched.
3. Select the **Destination** and configure print settings, as desired.
4. Click on the **Print** button. The report will be sent to the selected destination printer or file.
5. The generated report will contain the following data:

    Header:
    - **Date Created**
    - **Search Type**
    - **Search Options**
    - **Search Expression**
    - **Search Locations**

    Columns:
    - Source **Location**
    - File **Type**
    - **Host** Name

- File **Path or DB** (Database)
- **Object** Name
- **# Found** (Matches)

Print Search Result Details

1. Perform a search:
   - "Search Wizard" on page 31
   - "Perform a Regular Search" on page 60
   - "Use the Expression Builder" on page 65
2. From the Find it EZ menu, select **File -> Print -> Search Results Detail**. A **Select the items to include** pop-up will appear.
   a. Click to choose one of the options; **All results**, **Currently displayed results**, or **Checked results only**.
   b. Click on the **Next** button. A report containing the selected results will open in a new browser window and a browser **Print** dialog will be launched.
3. Select the **Destination** and configure print settings, as desired.
4. Click on the **Print** button. The report will be sent to the selected destination printer or file.
5. The generated report will contain the following data:

   Report header:
   - **Date Created**
   - **Search Type**
   - **Search Options**
   - **Search Expression**
   - **Search Locations**
   - **Search Category**

   Header for each match found:
   - Source **Location**
   - File **Type**
   - **Host** Name
   - **Filepath or DB** (Database)
   - **Object** Name
   - **# Matches**

See Also:

- "Work With Search Results" on page 97

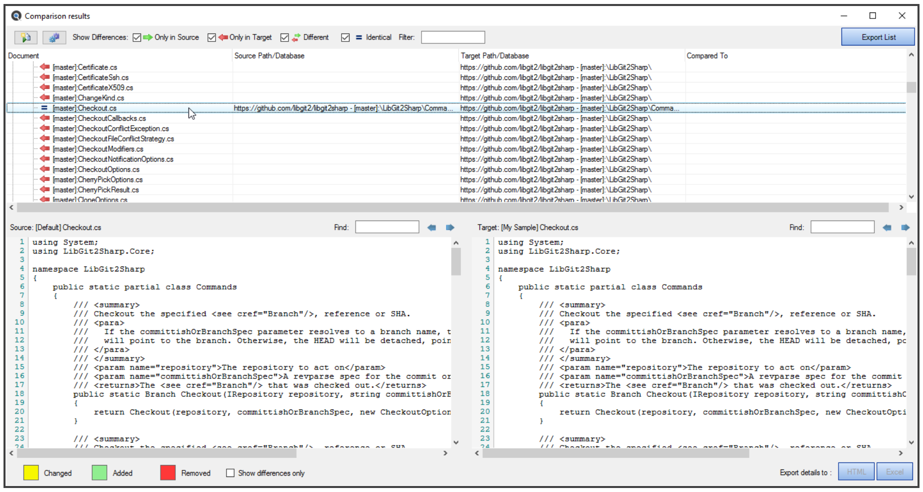
Compare Files, Reports, and Databases

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

View Compare Results Detail

See: "Compare Wizard" on page 42.

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



Start New Compare

1. "View Compare Results Detail" above.
2. In the upper, left corner of the **Comparison Results** window, click on the  button. You will be returned to the **Compare Wizard** to start a new comparison.

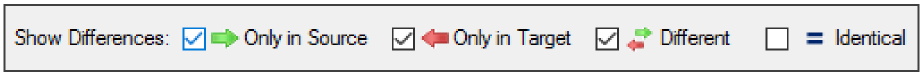
Modify Current Compare

1. "View Compare Results Detail" above.
2. In the upper, left corner of the **Comparison Results** window, click on the  button. You will be returned to the **Compare Wizard** to select which documents you want to compare.

Show Differences

See: "Compare Wizard" on page 42.

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



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

- **Only in Source**
- **Only in Target**
- **Different**

To view comparison results that are matching, click to check the **Identical** check-box.

Filter or Search Compare Results

1. At the top of the **Comparison Results** window, locate the **Filter** text box.
2. Enter the desired filter/search text into the text box. The results list will update automatically to show only those results matching your specified criteria.

Export Compare Results

See: "Compare Wizard" on page 42.

1. "Filter or Search Compare Results" above.
2. At the top of the **Comparison Results** window, locate and click on the **Export List** button. A **Save As** dialog will appear.
3. Enter a **File name**.
4. Click on the **Save** button.

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

5. The saved list will open automatically with the selected viewer/editor.
6. The following data will be included in the exported file:
   - Source, Target, and Date Created
   - View filter(s)
   - Type
   - # Differences
   - Document
   - Source Host
   - Source File Path or Database
   - Target Host
   - Target File Path or Database
   - Compared To
7. Save the file as desired.

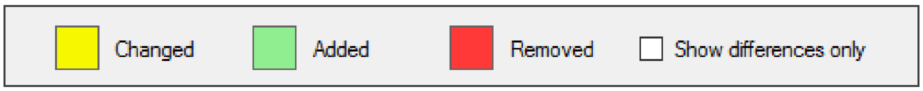
Expand or Collapse Compare Results

In the results list on the **Comparison Results** window, results are grouped by document and document type. To expand or collapse a result group, click on the '+' or '-' button, respectively.

Compare Status Colours

See: "Compare Wizard" on page 42.

At the bottom of the **Comparison Results** window, there is a result status colour key. See below:



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

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

Find in Source or Target

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

Show Differences Only

To view only the differences in content between the source and target, click to check the **Show differences only** check-box.

Export Compare Details

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

See Also:

- "Compare Wizard" on page 42
- "Select Documents to Compare" on page 1
- "Viewer / Editor Settings" on page 28

Copy or Print Compare Results

Select All Source or Target Compare Results

1. In the compare results list at the top, click to highlight the document for which you want to view details. Details will appear in the **Source** and **Target** boxes at the bottom.
2. In the **Source** or **Target** box, right-click on the compare result details. A context menu will appear.
3. From the context menu, choose **Select All**. All details in the current box will be highlighted.

Copy Source or Target Compare Results

1. In the compare results list at the top, click to highlight the document for which you want to view details. Details will appear in the **Source** and **Target** boxes at the bottom.
2. In the **Source** or **Target** box, select the text you want to copy.
3. Right-click on the compare result details. A context menu will appear.
4. From the context menu, select **Copy**. All highlighted details in the current box will be copied to the clipboard.

Save or Print Source or Target Compare Results

1. In the compare results list at the top, click to highlight the document for which you want to view details. Details will appear in the **Source** and **Target** boxes at the bottom.
2. In the **Source** or **Target** box, right-click on the compare result details. A context menu will appear.
3. From the context menu, select **Print**. A **Save As** dialog will appear.
4. Enter a **File name** and click on the **Save** button. The document will open in a new browser tab.
5. Print as desired; press the **[Ctrl] + [P]** keys on your keyboard.

See Also:

- "Compare Wizard" on page 42

Search and Replace

This section provides the instructions required to replace Crystal Reports data source connections or qualified table names or BOE BI database logon information.

Crystal Reports

Data Source Connections or Qualified Table Names

Follow these steps:

1. "Launch the Replace Wizard" on page 54.
2. "Select Where to Look for Reports" on page 54.
3. "Select Report Destination Folder" on page 55.
4. "Select Report Tables to Change" on page 56.
5. "Choose New Connection Type" on page 57.
6. "Confirm Information and Replace" on page 58.

BOE BI Database Logon Information

See: "Replace Wizard" on page 54.

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 analyse a large number of historic version reports in preparation for a possible upgrade to find which ones use non-ansi outer join syntax in the queries, you could do the following:

Many Find it EZ reports will give you precisely what you are looking for. One is the "Show SQL Queries" report. This report extracts any joins used by the visual linking expert within the CR designer and recreates the SQL code based on the join property options used by the visual linking tool. There is also the "Report Definition" and "SQL Code Extract" which actually has a column or section showing the type of join used when applicable via the visual linking expert. These reports are available under the **Reports -> Business Intelligence** menu.

Note: Our trial mode has the number of documents searched and output limited. However, a fully unlocked version is not limited. This may affect your evaluation results if the limits are hit prior to processing a file that contains visual linking.

Business Intelligence Reports

BI Reports can be generated and accessed as follows:

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

The following business intelligence reports are available:

- SQL Code Extract
- Reports Definition
- Show SQL Queries
- Database Cross-Reference
- Report Listing

SAP BOE Crystal Server

SAP BOE / Crystal Server reports can be generated and accessed as follows:

From the menu, select **Document -> SAP BOE / Crystal Server-> [desired report]**. See below.

The following SAP BOE / Crystal Server reports are available:

- Report Schedules
- Security Listing

Migrating Reports Example

The oldest Crystal Server supported by the vendor supplied XI 3.1 connector is CRS 2008. Adding support for versions earlier then that requires older SDKs no longer supported or available from SAP (we are a Partner and can't get those old SDKs unfortunately).

There is a simplified procedure. Provided you do not need to convert and continue to use the reports within your existing Crystal XI (11) server, here is what you can do:

1. Download the RPT files from your CR XI server, saving the files locally. Unfortunately, it does not look like there is a mass download function built into the Crystal Server CMS.

2. Start Find it EZ Dev Surge 365. Change the "repository" within Find it EZ:.
    a. From the menu, select **Tools -> Customize -> File Locations**.
    b. From the SAP Repository drop-down list, select Crystal Server 2013.
    c. Click on the OK button. This may force a program restart, this is normal.
3. Install the latest BI 4.1 SP7 connector. Use this menu and follow-directions to download and install automatically:
    a. From the menu, select **Tools -> Download Connectors -> BusinessObjects BI Platform**.
    b. Click on the **Download & Install** button.
4. Use the change datasource wizard to automatically change the datasource and upgrade the RPT files to CR 2013 format (by default, saved files are now also in CR 2013 format). No need to open and save each RPT file individually using CR Designer 2013.
    a. From the menu, select **Replace -> Crystal Reports -> Data source connections or qualified table names**.
5. Use the normal CR 2013 upload exe to place all the converted RPT files into the new target CRS 2013 repository.
6. If necessary after upload, you can also use Find it EZ to set / reset login authentication on all uploaded RPT files within the new CRS 2013 repository.
    a. From the menu, select **Replace -> Crystal Reports -> BOE BI Database logon information**.

Save and View Report

When you generate a report using the **Export Wizard**, a **Save As** dialog appears. Enter a **File name** and click on the **Save** button. The report is created and a **Save Complete** notification appears. To view the saved report, click on the **View Now** button. The report will open in the selected editor.

See Also:

- "Document Wizard" on page 50
- "Navigation" on page 13
- "Viewer / Editor Settings" on page 1

Example Workflow Scenarios

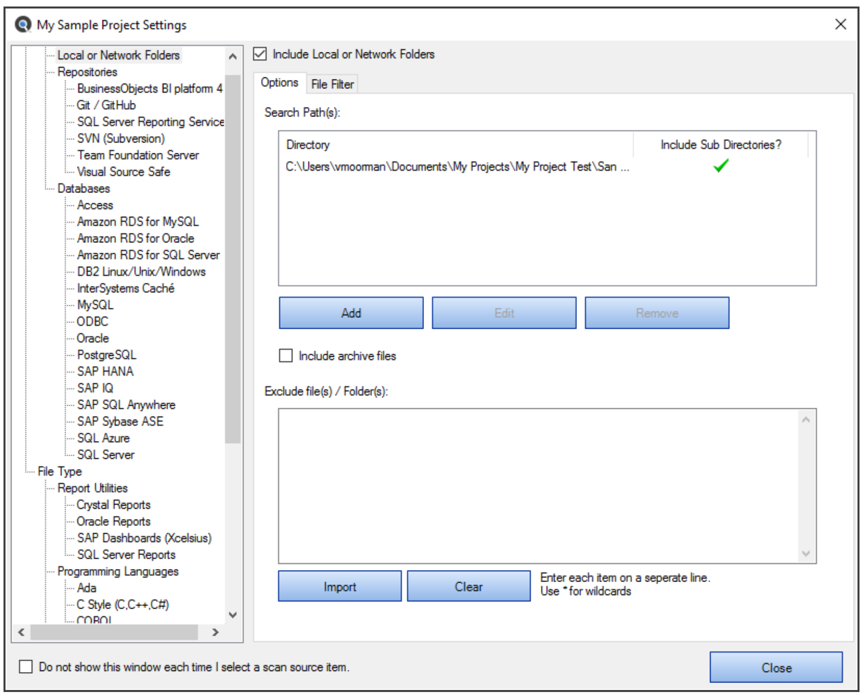
This section provides a number of example scenarios, procedures, and resulting screen shots for searching and reporting in source file locations, databases, and accessing reporting tools.

Source File Locations

Examples provided in this section include searching local or network folders, searching a GitHub repository, and searching a Team Foundation Server (TFS) repository.

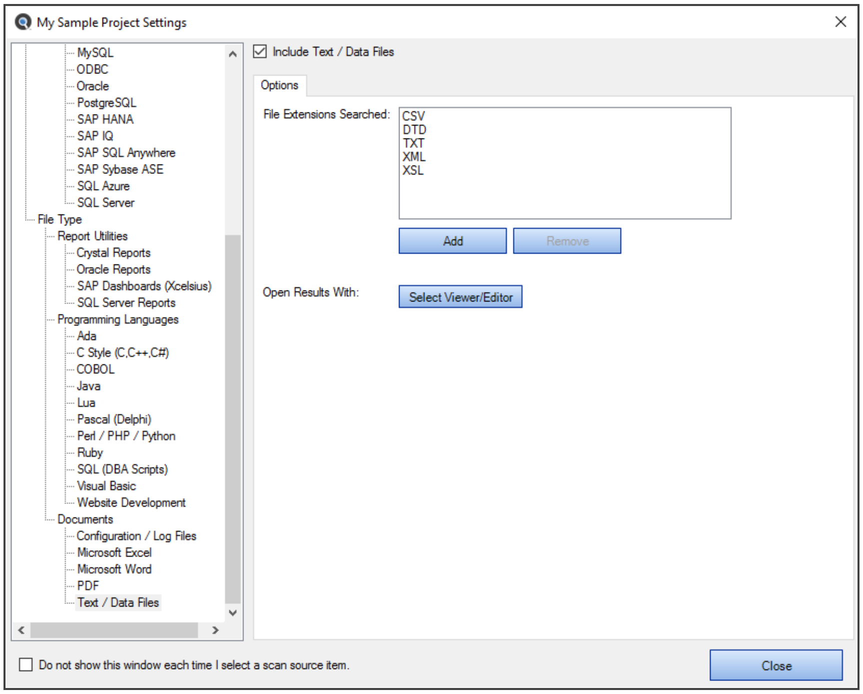
Search Local or Network Folders

1. From the **Source** frame on the left, locate the **File Locations** category.
2. Click to check the **Local or Network Folders** source. The **Project Settings** dialog will appear.
3. Configure settings. **See:**"Local or Network Folders" on page 75



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:

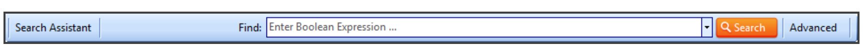


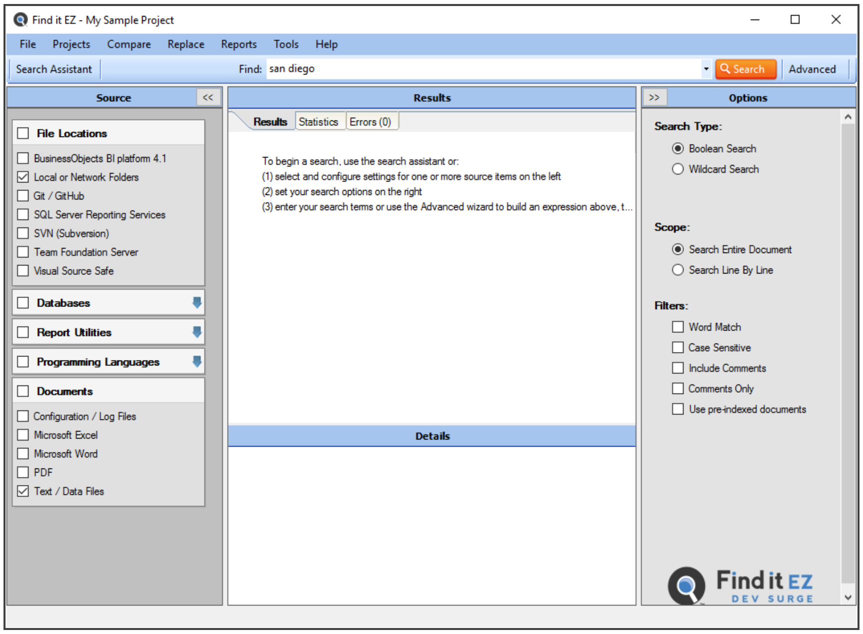
6. From the **Options** frame on the right, choose the desired **Search Type** and **Scope**, and select the desired **Filters**.

Note: Default search **Options** are: **Search Type** = Boolean Search, **Scope** = Search Entire Document, **Filters** = None. Search options can be changed for 'on start-up' or 'new project' search to use this default or to remember your last used settings.

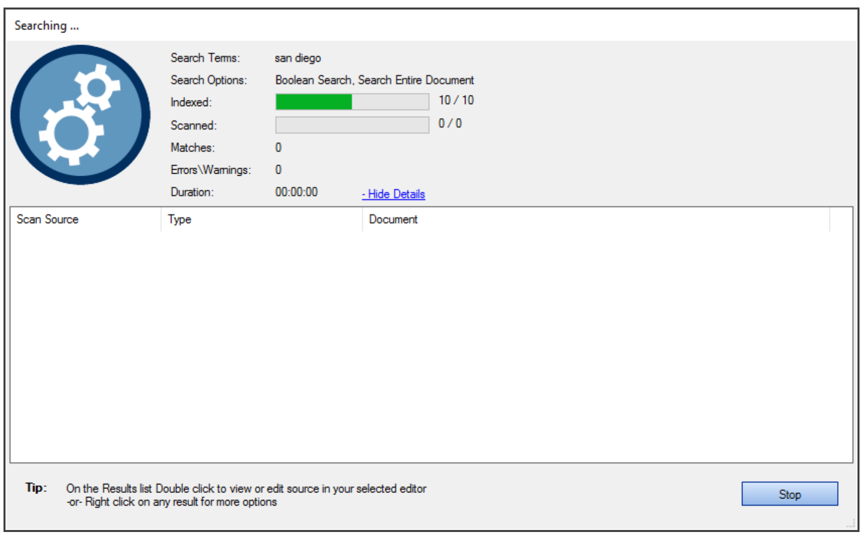
Tip: For better search performance, click to check the Use pre-indexed documents in **Filters**. This will use the last indexed document content and therefore will not refresh content with latest updates. Use this filter if it is known that the source documents are changed infrequently or have not changed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

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

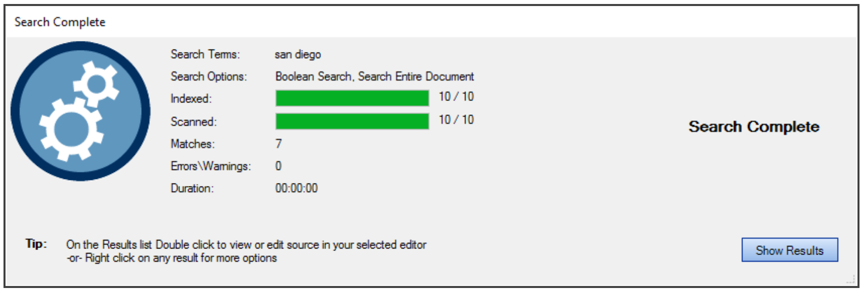




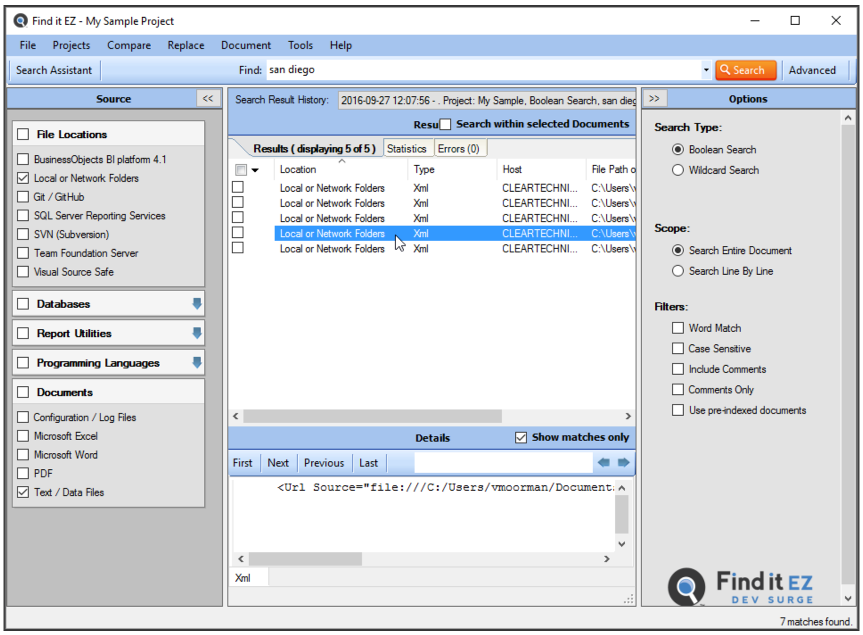
8. Click on the **Search** button to initiate the search. A **Searching** dialog box will appear, showing the status of the search.



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

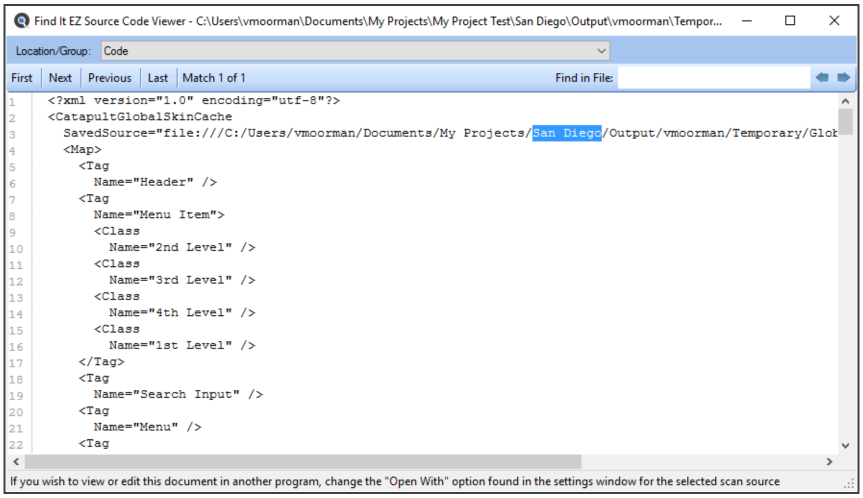


10. Click on the **Show Results** button. A list of results matching your search criteria will appear in the **Results** frame.



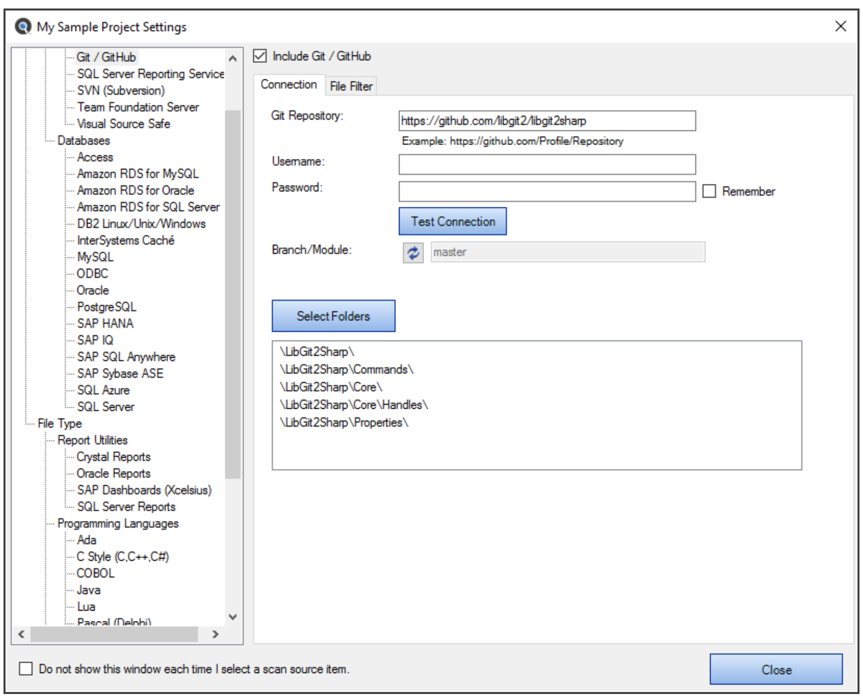
Note: After performing a search, settings can be saved to a Project for later use again.

11. To view details for a result, click on a row in the **Results** window. Details will appear in the **Details** window.
12. To view the source file, right-click on a detail line and select **Open** from the context menu. See example below:

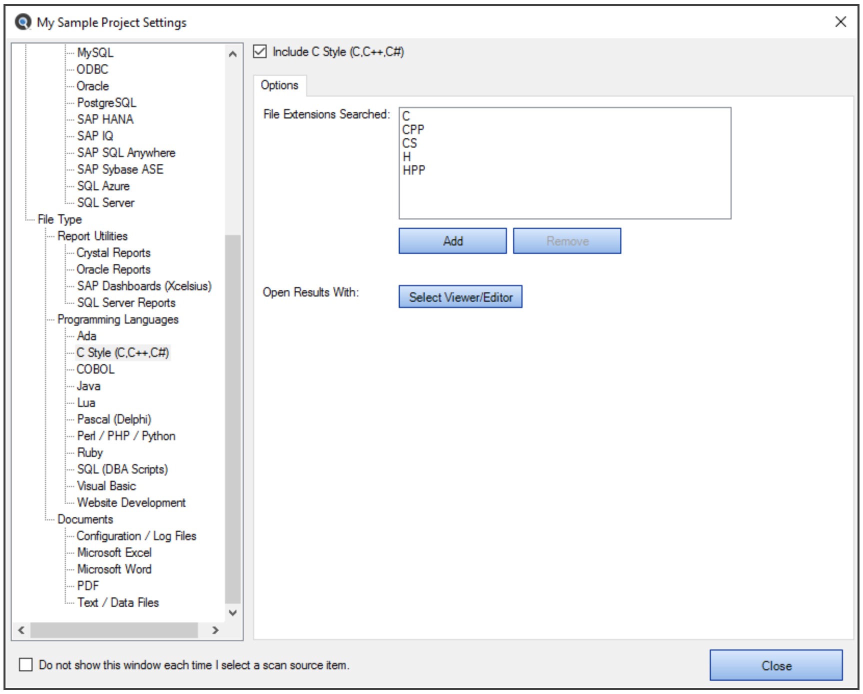


Search a Git / GitHub Repository

1. From the **Source** frame on the left, locate the **File Locations** category.
2. Click to check the **Git / GitHub** source. The **Project Settings** dialog will appear.
3. Configure settings. **See:** "Connection Information - Repositories" on page 79. See example below:



4. From the **Source** frame on the left, click to check one or more supported file type(s). In the example below, **C Style (C,C++,C#)** has been selected from the **Programming Languages** category.
5. Configure settings. See example below:

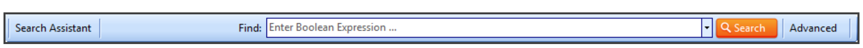


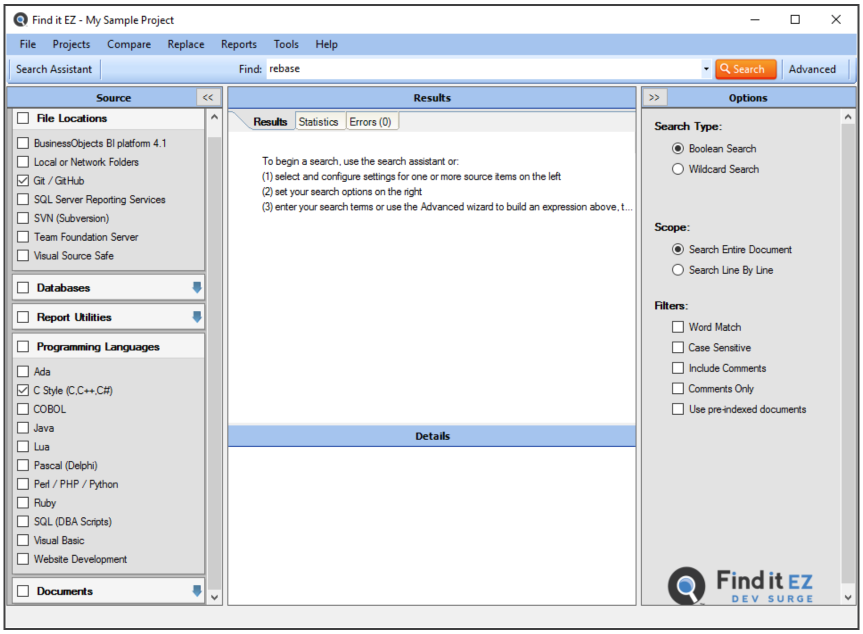
6. From the **Options** frame on the right, choose the desired **Search Type** and **Scope**, and select the desired **Filters**.

> **Note:** Default search **Options** are: **Search Type** = Boolean Search, **Scope** = Search Entire Document, **Filters** = None. Search options can be changed for 'on start-up' or 'new project' search to use this default or to remember your last used settings.

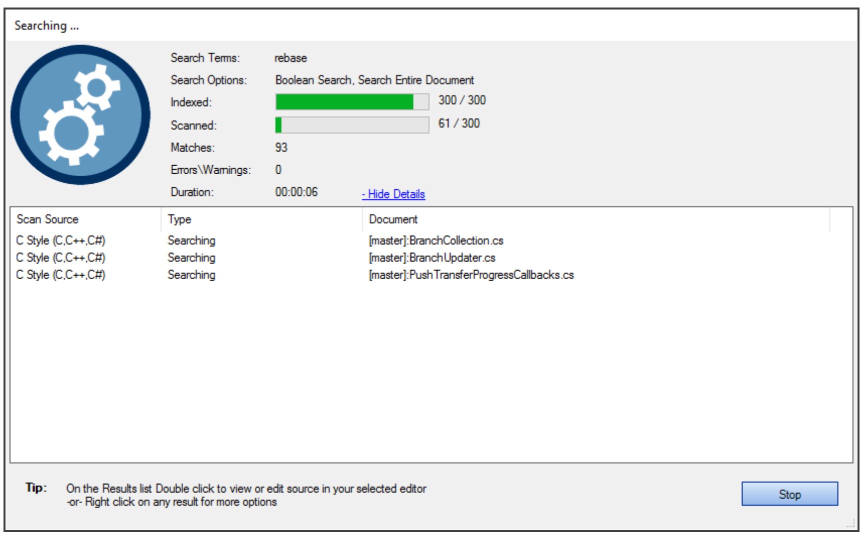
> **Tip:** For better search performance, click to check the Use pre-indexed documents in **Filters**. This will use the last indexed document content and therefore will not refresh content with latest updates. Use this filter if it is known that the source documents are changed infrequently or have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

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

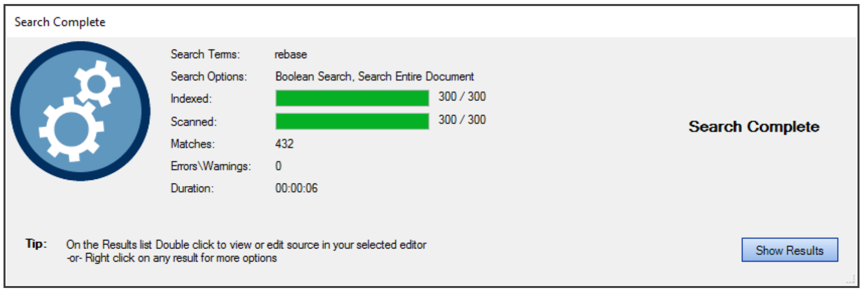




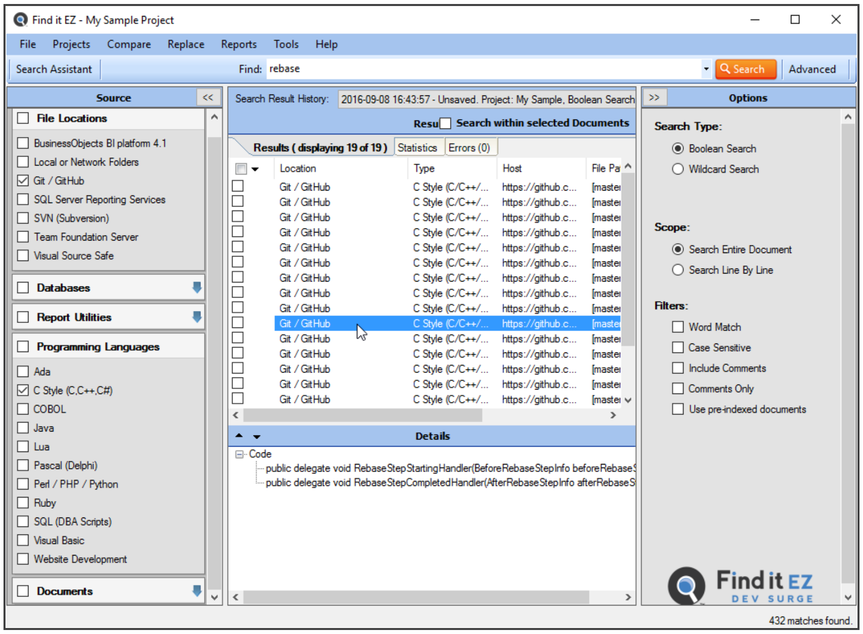
8. Click on the **Search** button to initiate the search. A **Searching** dialog box will appear, showing the status of the search. See example below:



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



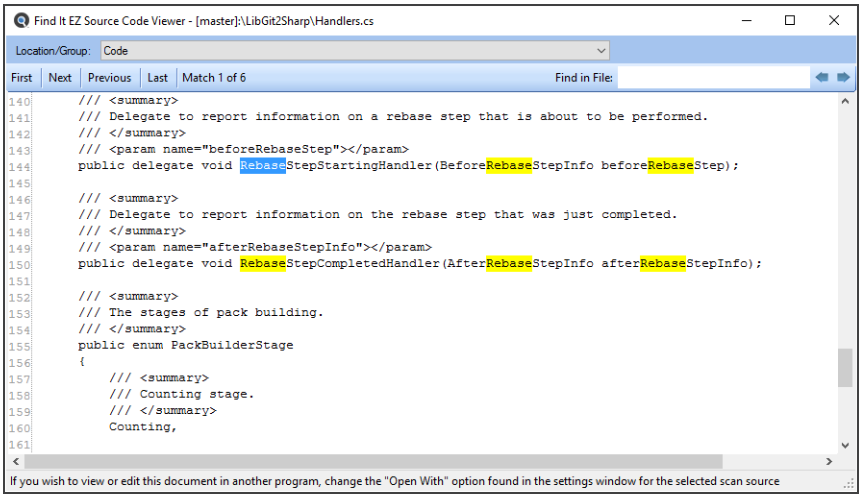
10. Click on the **Show Results** button. A list of results matching your search criteria will appear in the **Results** frame. See example below:



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

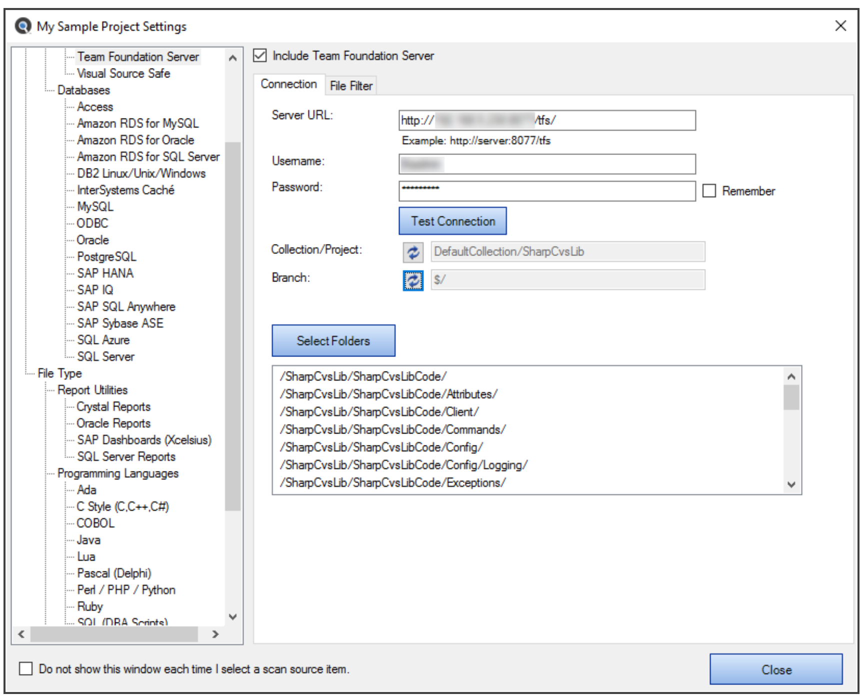
11. To view details for a result, click on a row in the **Results** window. Details will appear in the **Details** window.

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



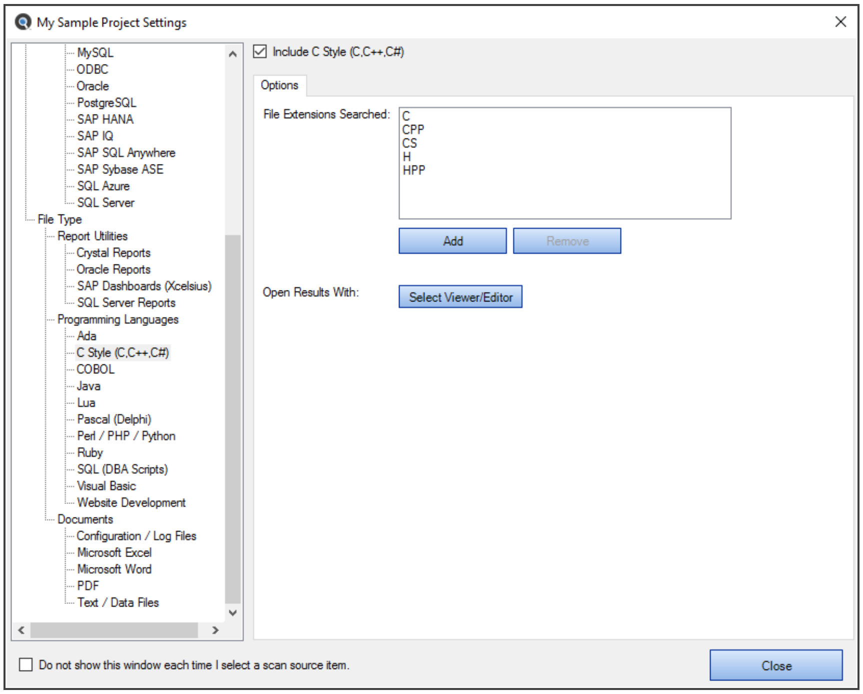
Search a Team Foundation Server (TFS) Repository

1. From the **Source** frame on the left, locate the **File Locations** category.
2. Click to check the **Team Foundation Server** source. The **Project Settings** dialog will appear.
3. Configure settings. **See:** "Connection Information - Repositories" on page 79. See example below:



4. From the **Source** frame on the left, click to check one or more supported file type(s). In the example below, **C Style (C,C++,C#)** has been selected from the **Programming Languages** category.

5. Configure settings. See example below:

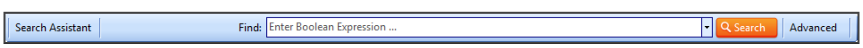


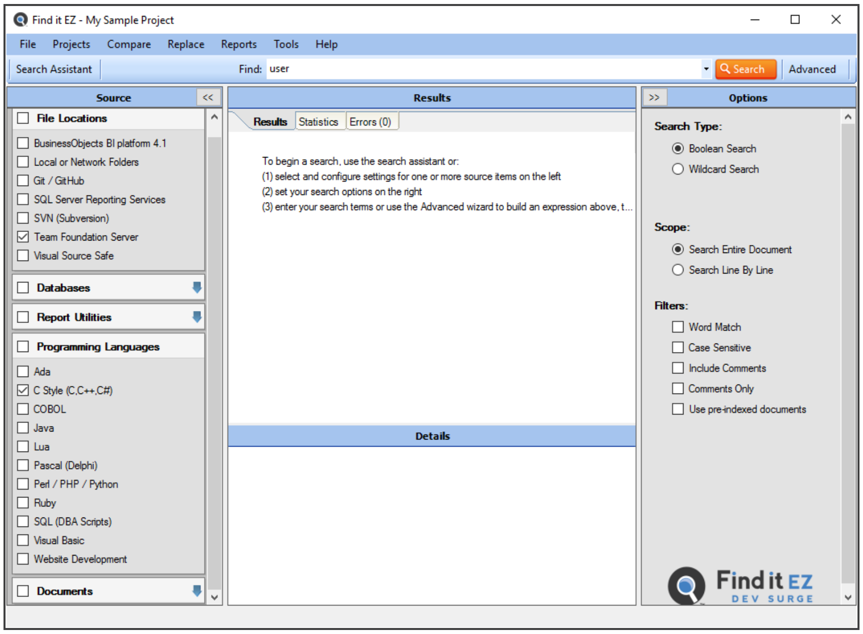
6. From the **Options** frame on the right, choose the desired **Search Type** and **Scope**, and select the desired **Filters**.

Note: Default search **Options** are: **Search Type** = Boolean Search, **Scope** = Search Entire Document, **Filters** = None. Search options can be changed for 'on start-up' or 'new project' search to use this default or to remember your last used settings.

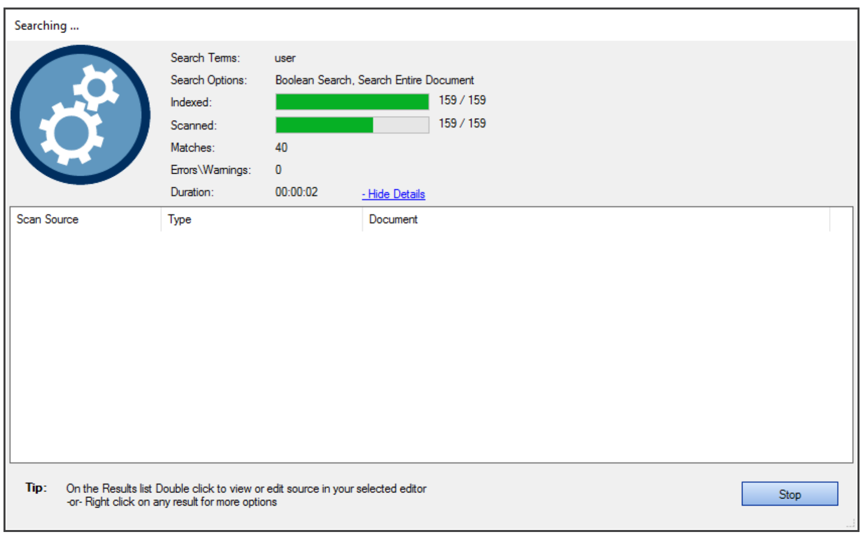
Tip: For better search performance, click to check the Use pre-indexed documents in **Filters**. This will use the last indexed document content and therefore will not refresh content with latest updates. Use this filter if it is known that the source documents are changed infrequently or have not changed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

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

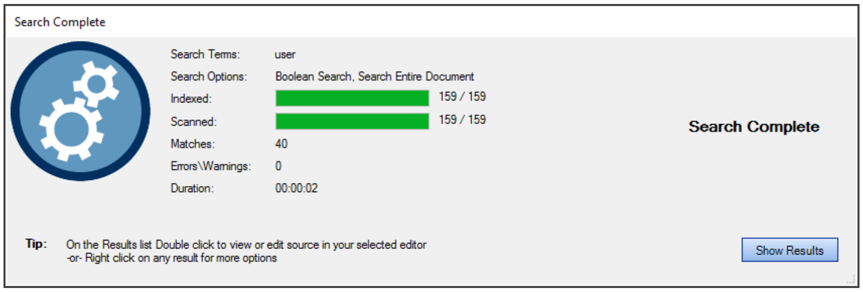




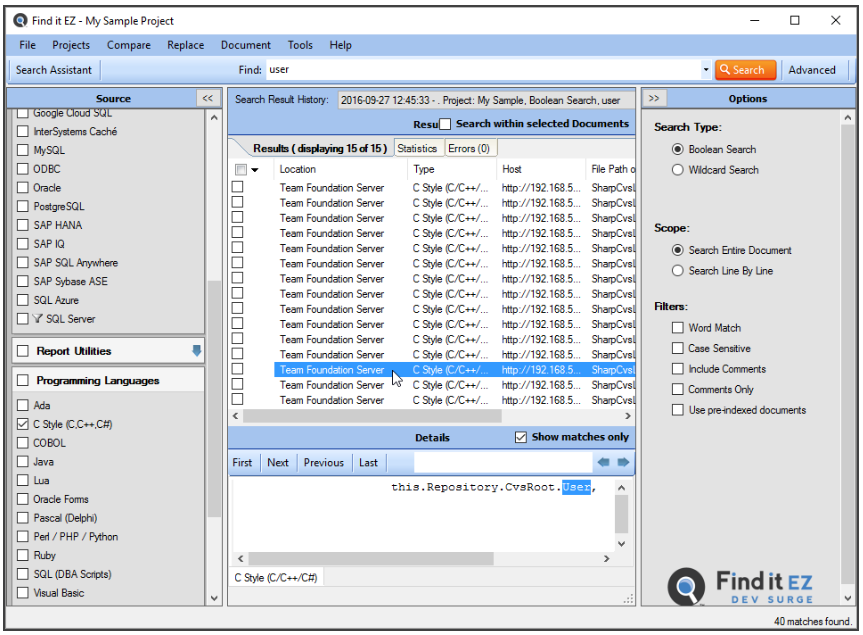
8. Click on the **Search** button to initiate the search. A **Searching** dialog box will appear, showing the status of the search. See example below:



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



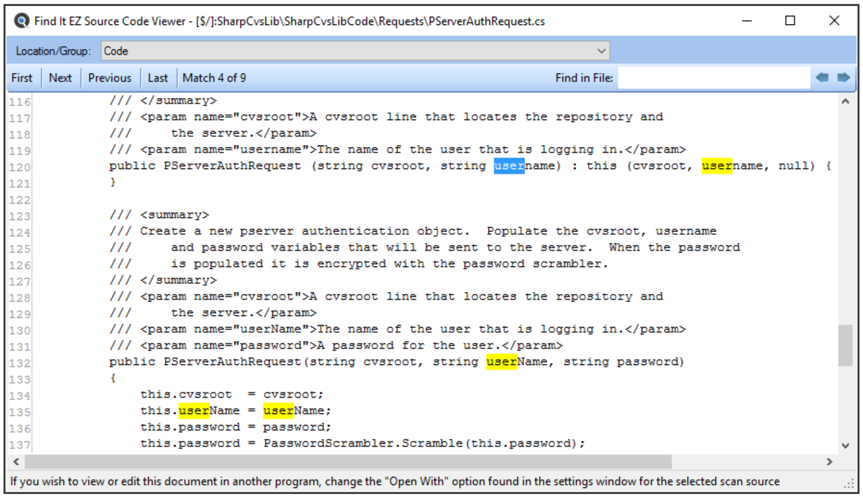
10. Click on the **Show Results** button. A list of results matching your search criteria will appear in the **Results** frame. See example below:



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

11. To view details for a result, click on a row in the **Results** window. Details will appear in the **Details** window.

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



See Also:

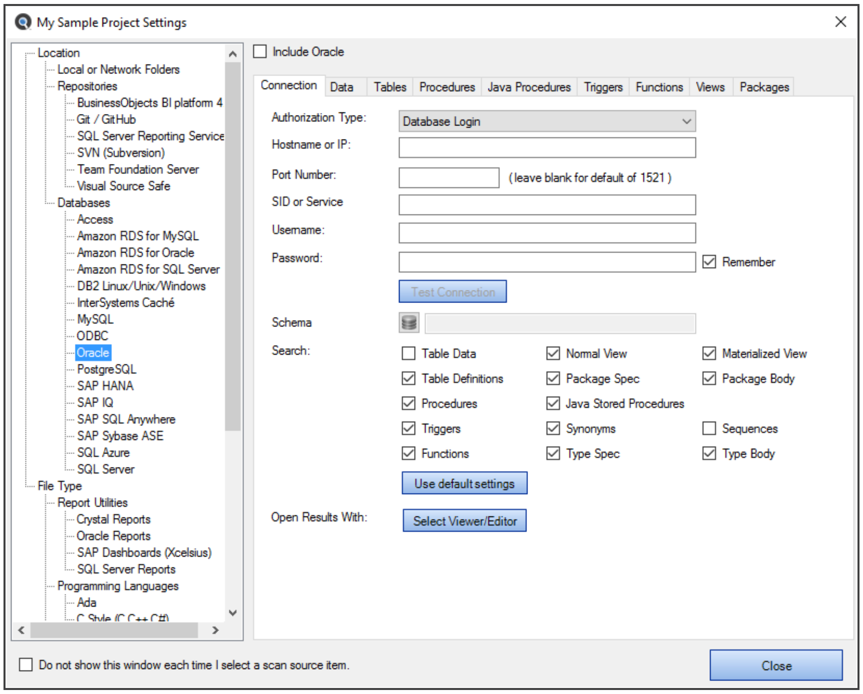
- "Product Overview" on page 12
- "Set User Options" on page 21
- "Use the Expression Builder" on page 65
- "Searching Window" on page 68
- "Work With Search Results" on page 97
- "Save Search Results" on page 107

Databases

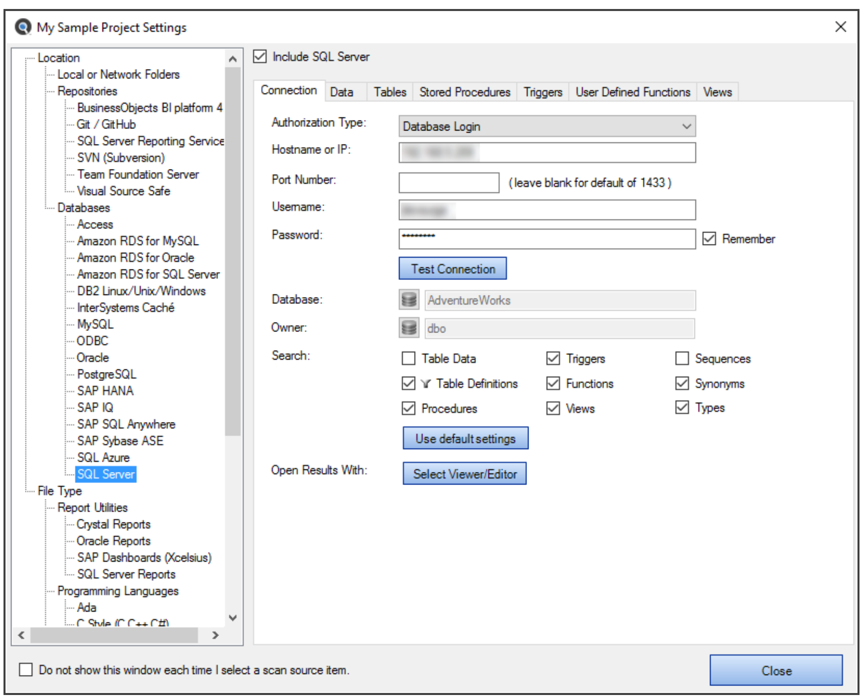
This section describes the procedures required to include the databases source in a search, enter database connection information, test a database connection, reset search defaults, open results with the desired viewer/editor, and apply various database search filters.

To access project settings for databases:

1. Edit the desired project. **See:** "Search Locations and Source Settings" on page 75.
2. In the frame on the left, in the **Location** category, locate the **Databases** sub category.
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. **See:** "Databases" on page 132.
2. 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
3. To have Find it EZ remember your password, click to check the **Remember** check-box.
4. Click on the **Apply** 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.
2. If the test is successful, you will receive a "A connection was made successfully!" message.

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.

Reset Search Defaults

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

To restore the selections to the default settings that came with your Find it EZ install, click on the **Reset search defaults** button.

Open Results With

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

Apply Database Search 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

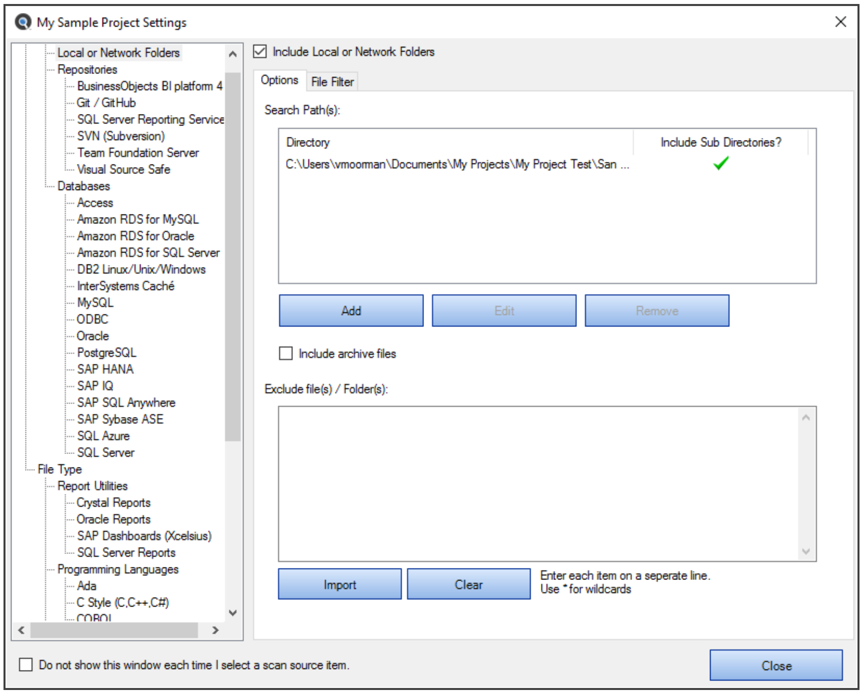
Click on the desired filter tab (see links below).

See Also:

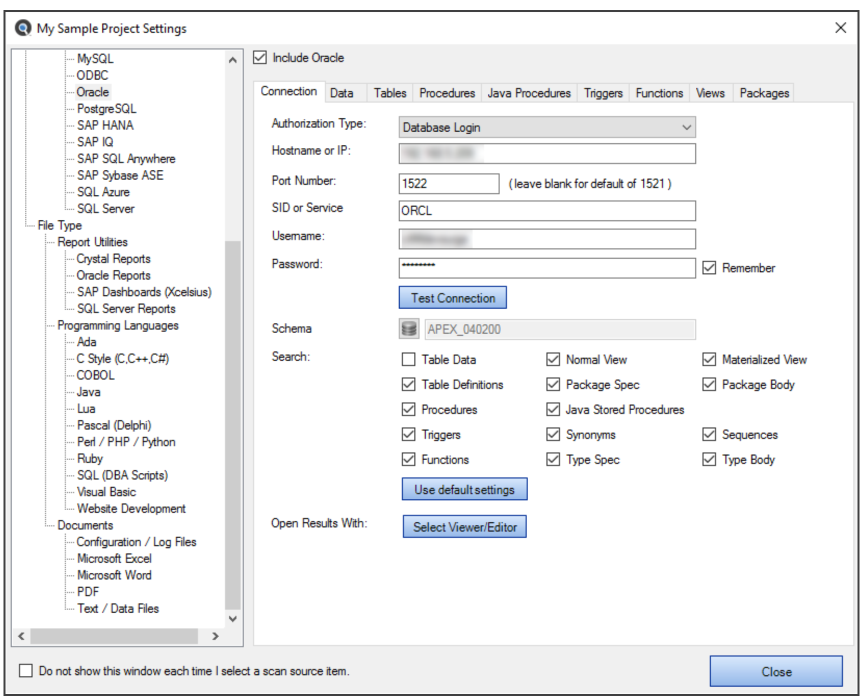
- "Apply File Filter" on page 77
- "Viewer / Editor Settings" on page 28
- "Report Utilities" on page 95

Search an Oracle Database

1. From the **Source** frame on the left, locate the **File Locations** category.
2. Click to check the desired file location. The **Project Settings** dialog will appear.
3. Configure settings. See Local or Network Folders example below:



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

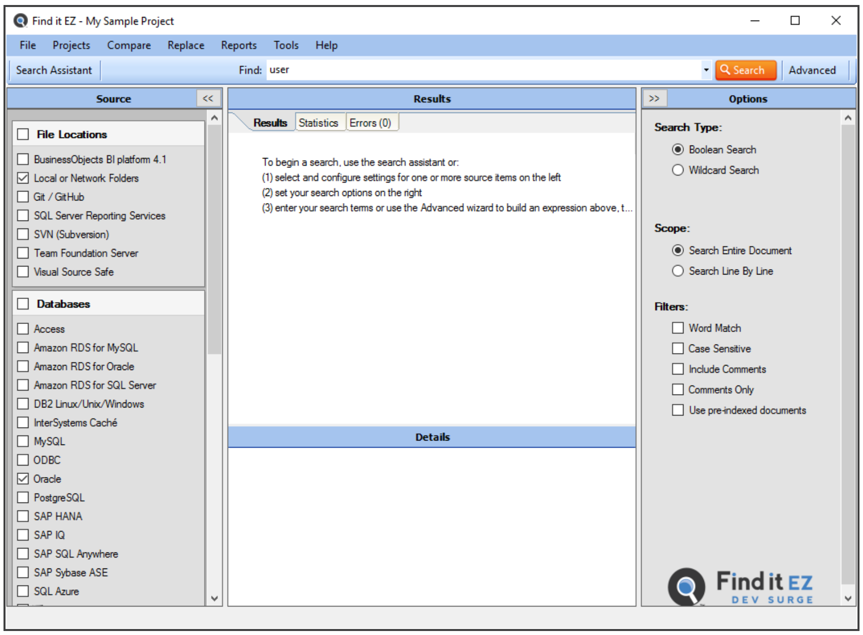


6. From the **Options** frame on the right, choose the desired **Search Type** and **Scope**, and select the desired **Filters**.

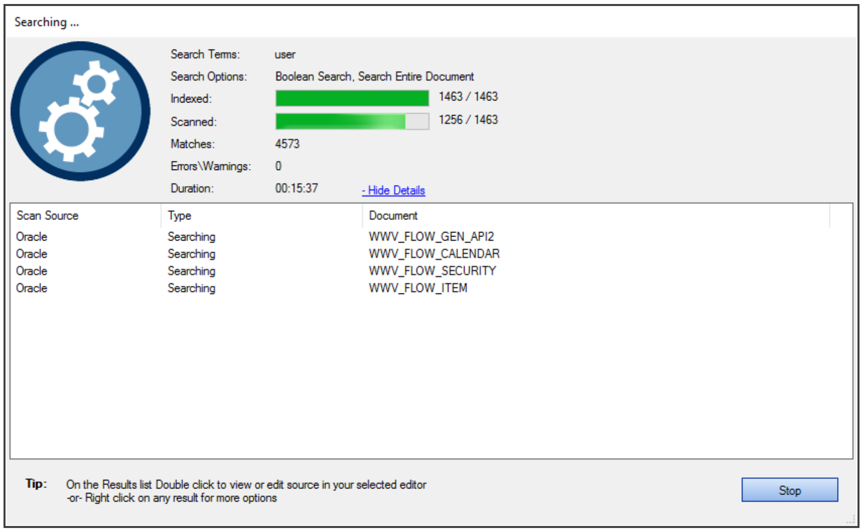
   Note: Default search **Options** are: **Search Type** = Boolean Search, **Scope** = Search Entire Document, **Filters** = None. Search options can be changed for 'on start-up' or 'new project' search to use this default or to remember your last used settings.

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

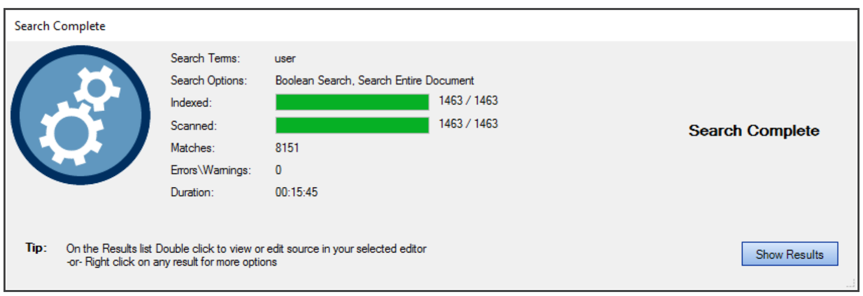
7. On the search bar (see image below), enter the desired search text into the **Find** text box.



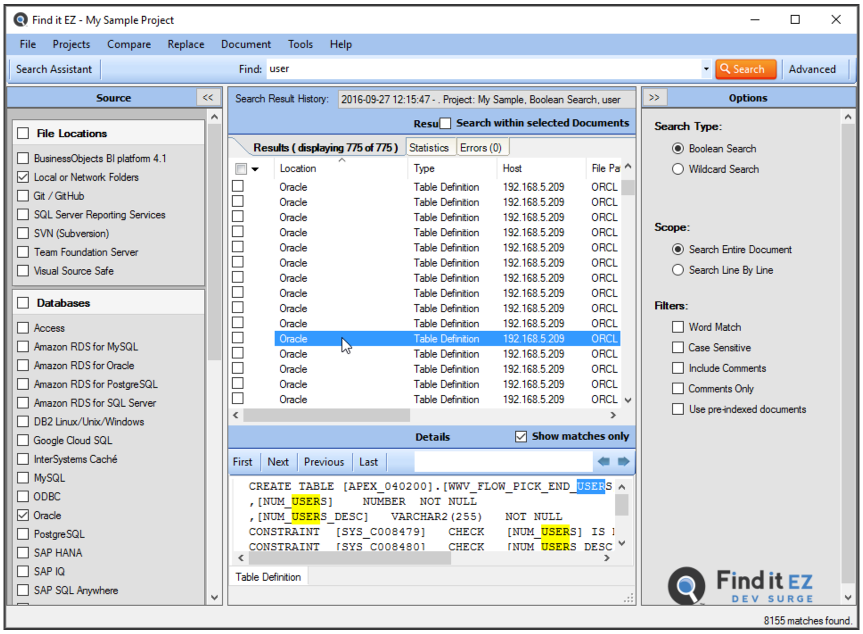
8. Click on the **Search** button to initiate the search. A **Searching** dialog box will appear, showing the status of the search. See example below:



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



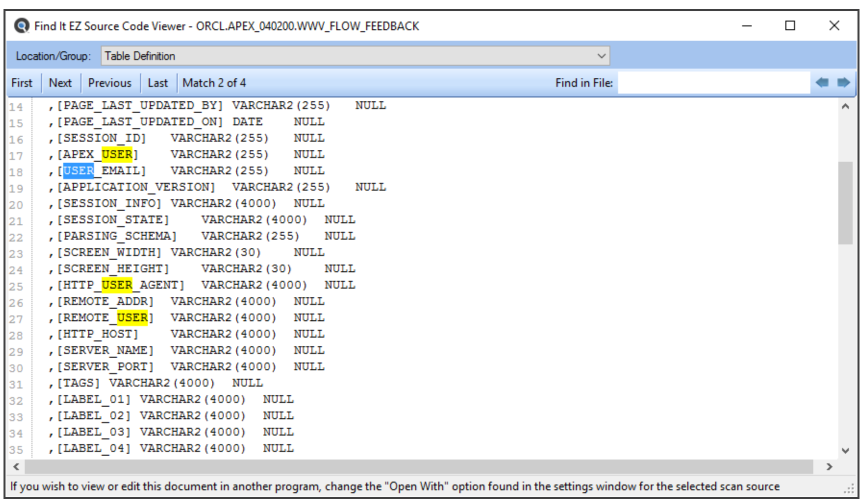
10. Click on the **Show Results** button. A list of results matching your search criteria will appear in the **Results** frame. See example below:



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

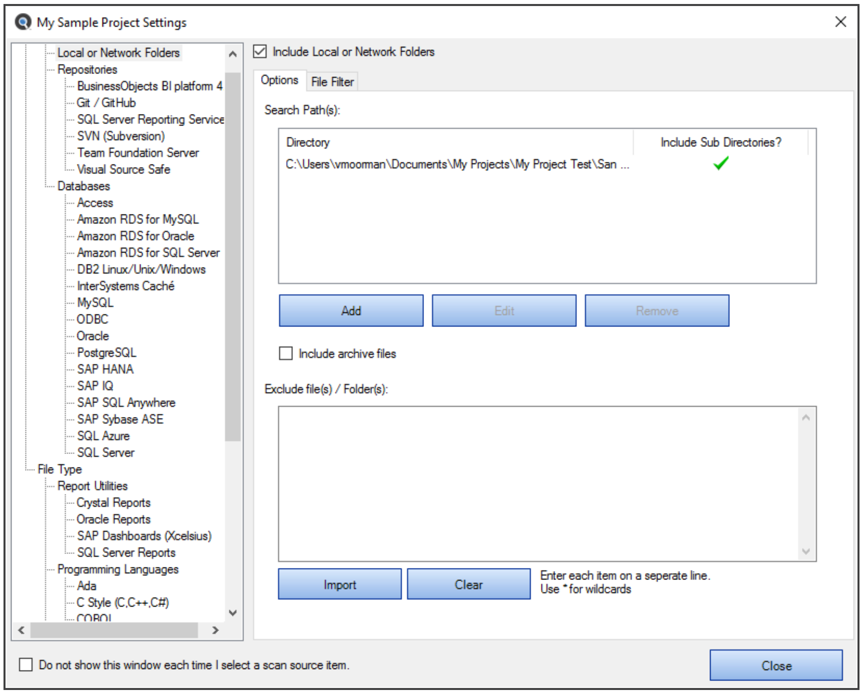
11. To view details for a result, click on a row in the **Results** window. Details will appear in the **Details** window.

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

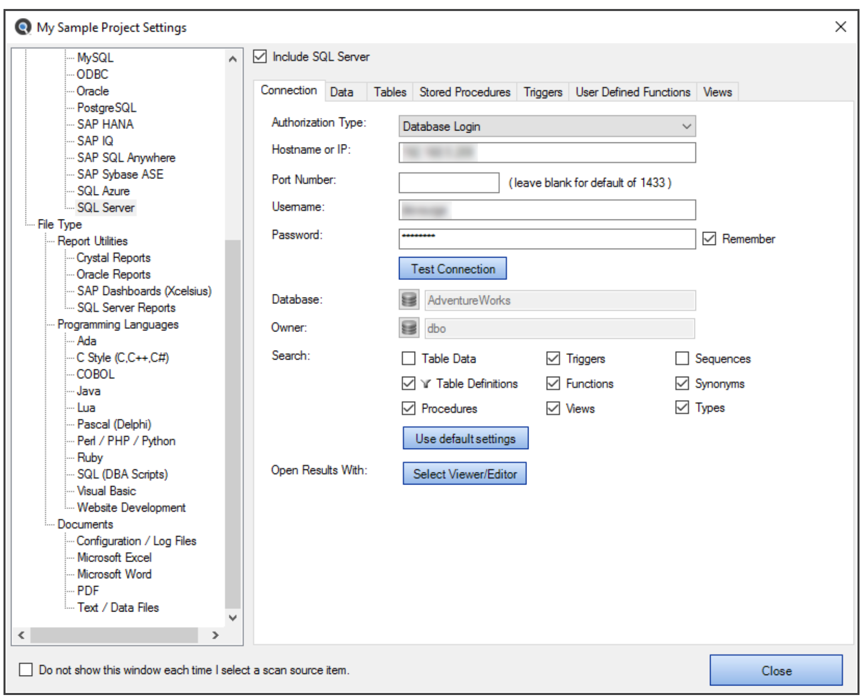


Search a SQL Server Database

1. From the **Source** frame on the left, locate the **File Locations** category.
2. Click to check the desired file location. The **Project Settings** dialog will appear.
3. Configure settings. See Local or Network Folders example below:



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

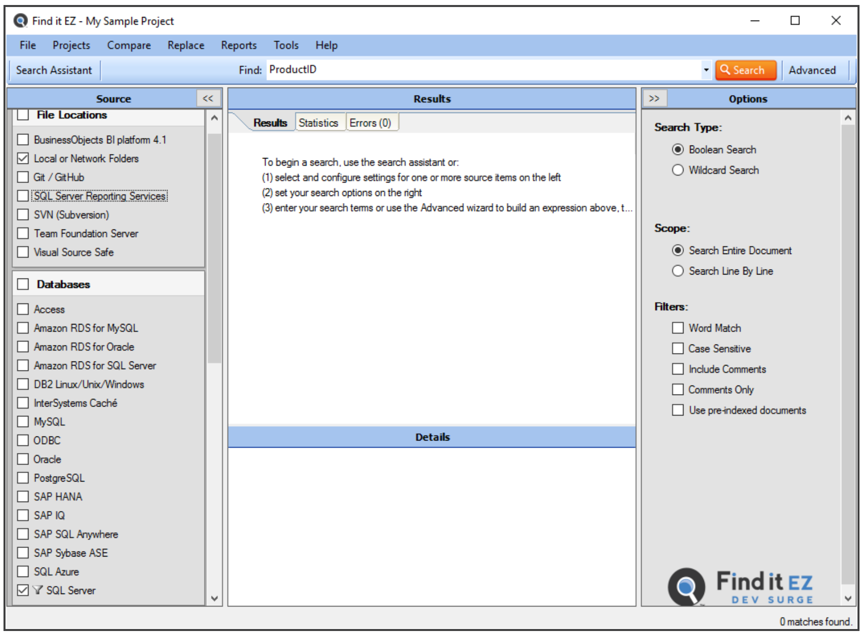


6. From the **Options** frame on the right, choose the desired **Search Type** and **Scope**, and select the desired **Filters**.

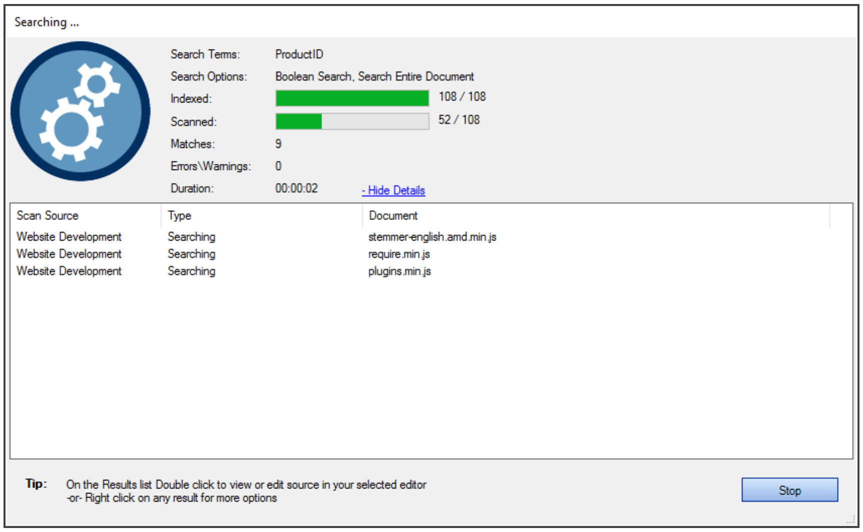
   Note: Default search **Options** are: **Search Type** = Boolean Search, **Scope** = Search Entire Document, **Filters** = None. Search options can be changed for 'on start-up' or 'new project' search to use this default or to remember your last used settings.

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

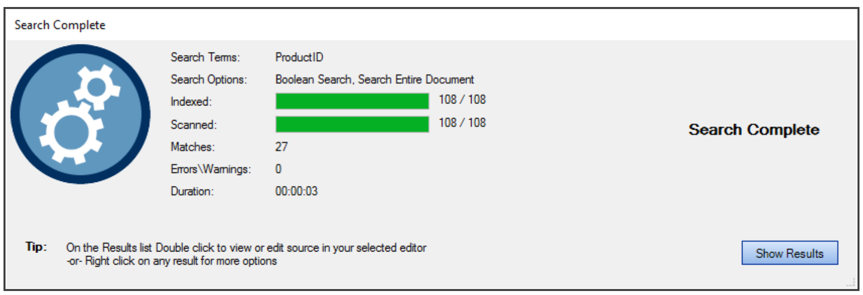
7. On the search bar (see image below), enter the desired search text into the **Find** text box.



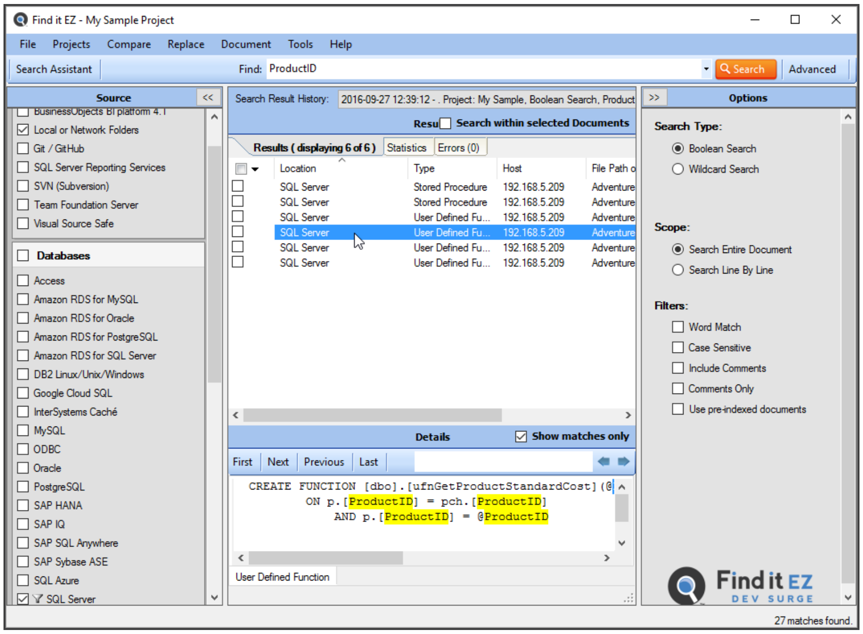
8. Click on the **Search** button to initiate the search. A **Searching** dialog box will appear, showing the status of the search. See example below:



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

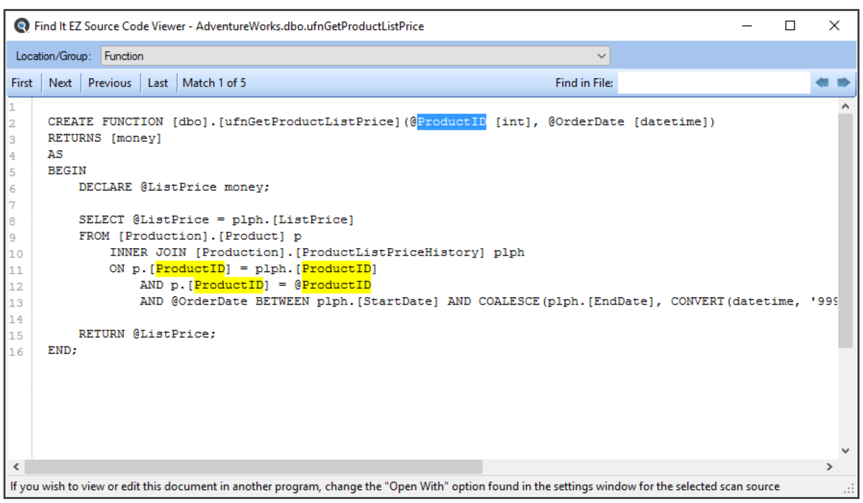


10. Click on the **Show Results** button. A list of results matching your search criteria will appear in the **Results** frame. See example below:



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

11. To view details for a result, click on a row in the **Results** window. Details will appear in the **Details** window.
12. To view the source file, right-click on a detail line and select **Open** from the context menu. See example below:



See Also:

- "Product Overview" on page 12
- "Set User Options" on page 21
- "Use the Expression Builder" on page 65
- "Searching Window" on page 68

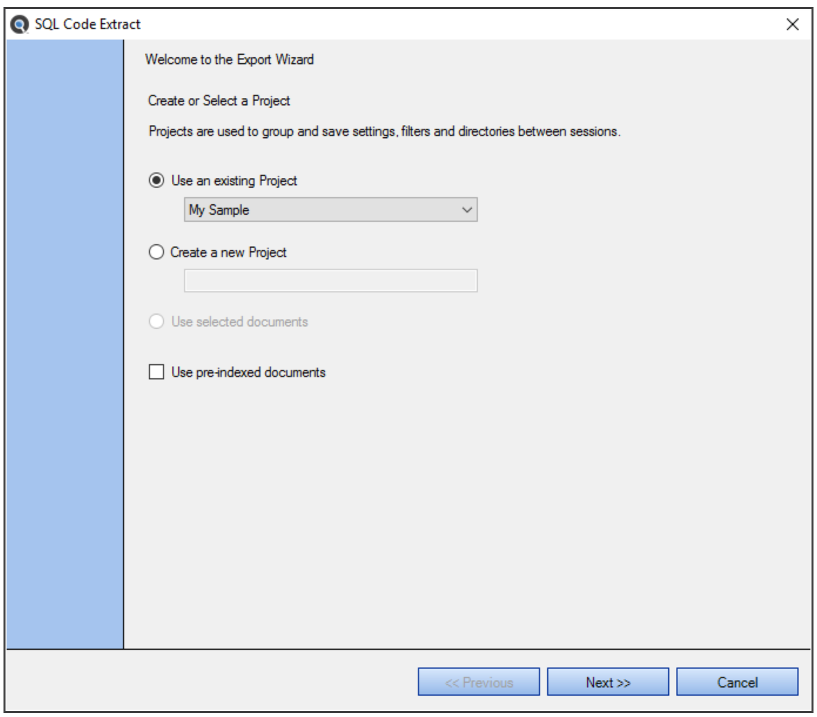
- "Work With Search Results" on page 97
- "Save Search Results" on page 107
- "Include Source" on page 1

Reporting Tools

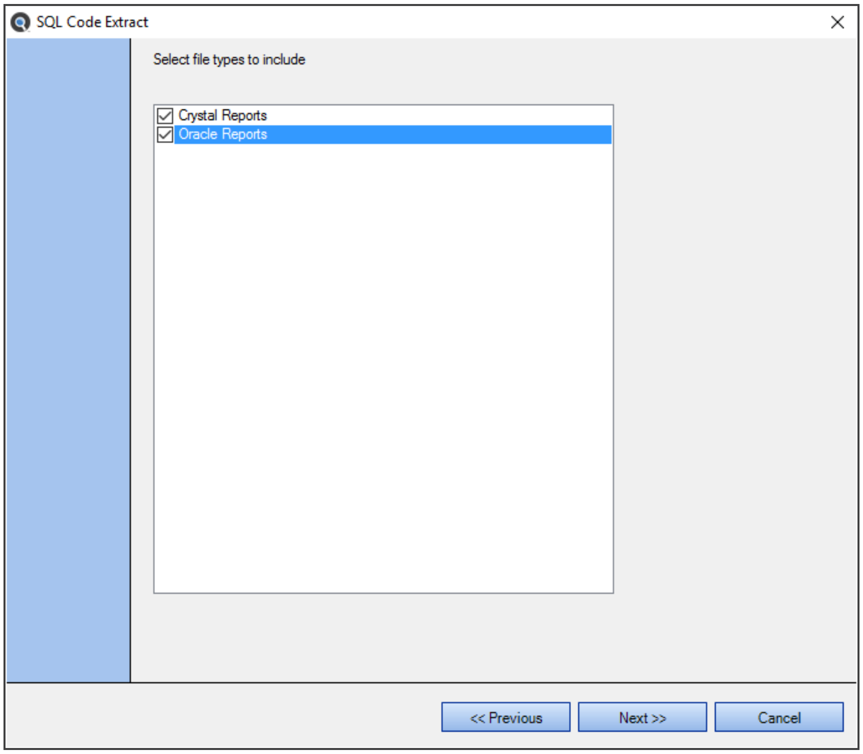
Examples in this section include creating a SQL statements detail extract and creating a database cross-reference list.

Create a SQL Statements Detail Extract

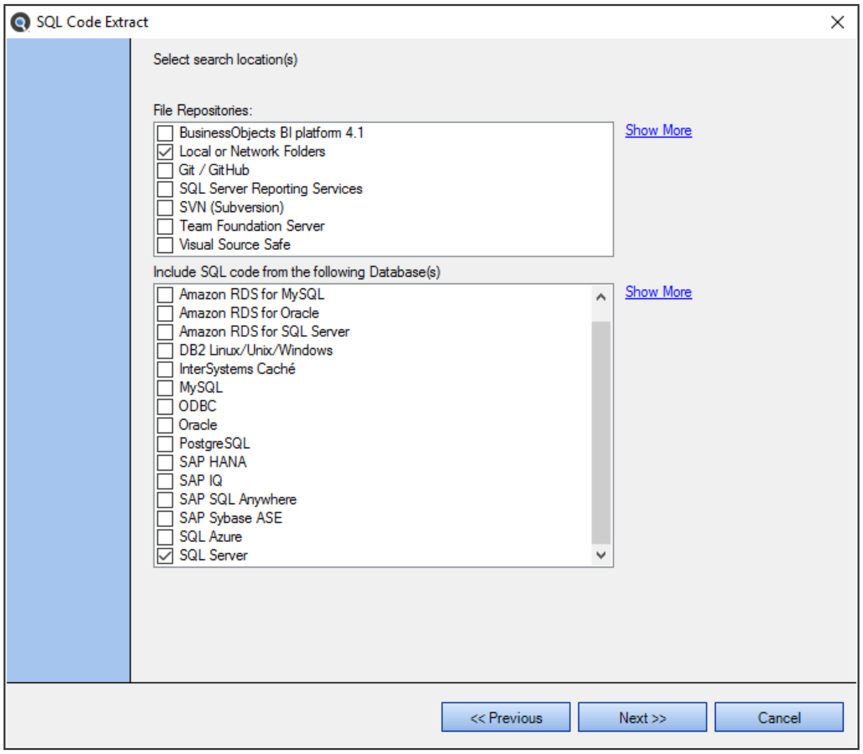
1. Launch the Export Wizard for SQL Code Extract:
   a. Using the Search Wizard:
      i. At the top, left of the main window, click on the **Search Wizard** button. The **Search Wizard** dialog will appear.
      ii. Click to choose the **Extract database objects (tables, stored procedures, views, etc.) used in my reports** option. The **Export Wizard** will appear.
   b. Using the menu:
      i. From the Find it EZ menu, select **Document -> Business Intelligence -> SQL Code Extract**. The **Export Wizard** will appear. See below:



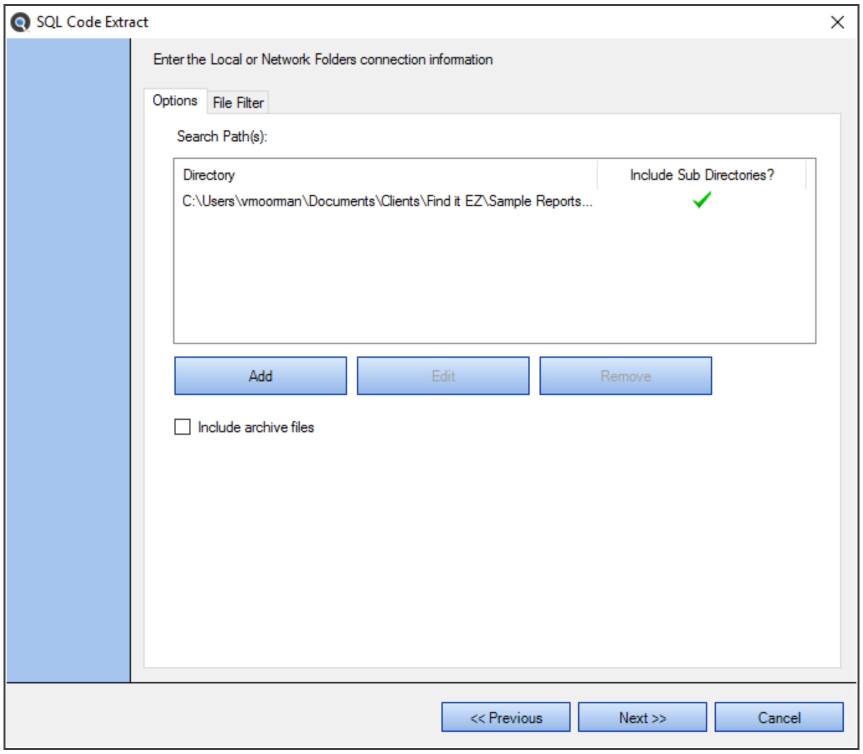
2. **See:** "Create or Select a Project" on page 35.
3. Click on the **Next >>** button to continue.



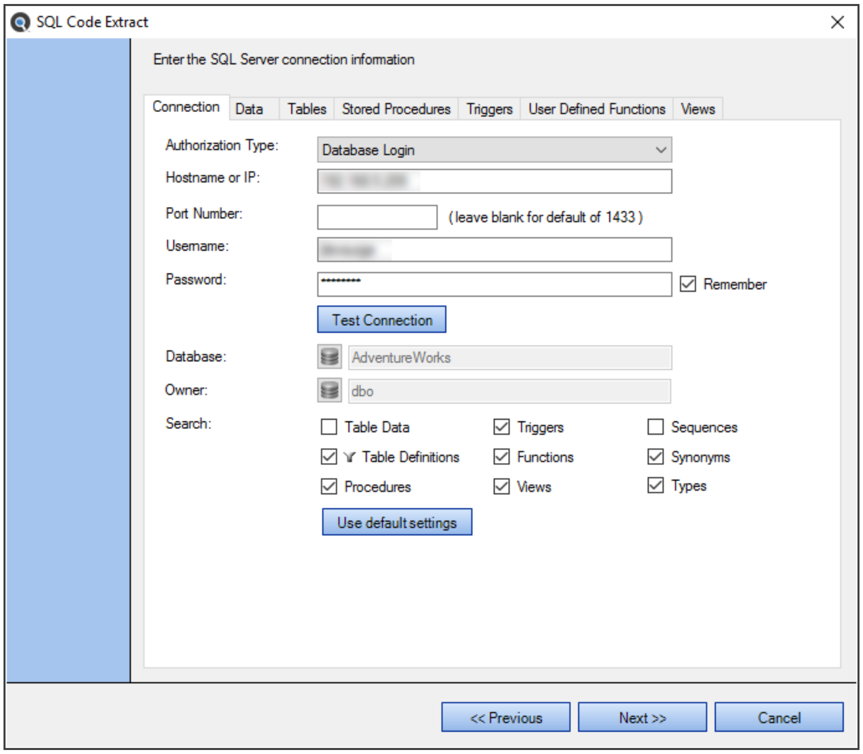
4. Click to select the file types to include. See: "Select File Types to Include" on page 36.
5. Click on the **Next >>** button to continue.



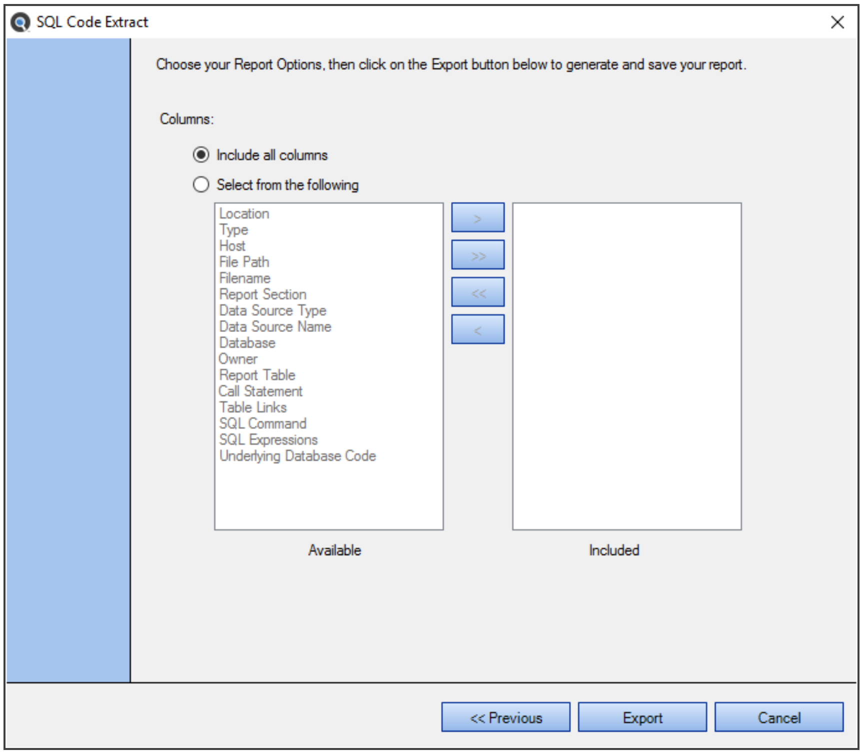
6. Click to select the desired search locations. See: "Select Search Location(s)" on page 37.
7. Click on the **Next >>** button to continue.



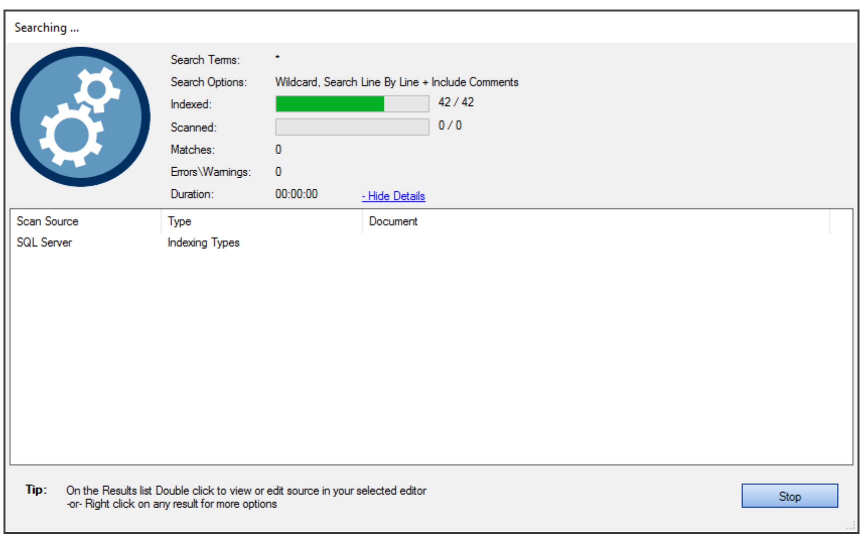
8. Enter the file location connection information. See:
    - "Add or Edit Search Path(s)" on page 76
    - "Apply File Filter" on page 77
    - "Include Archive Files" on page 77
9. Click on the **Next >>** button to continue. The **Project Settings** dialog will appear.



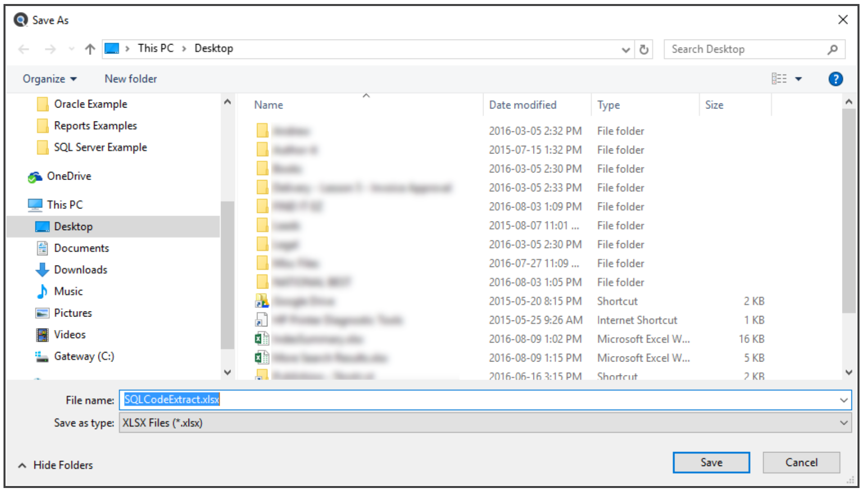
10. Enter connection settings for the selected source. See:
    - "Connection Information - Databases" on page 134
    - "Connection Information - Repositories" on page 79
11. Click on the **Next >>** button to continue.



12. Choose report options. See: "Choose Report Options and Export Report" on page 52.
13. Click on the **Export** button. Find it EZ will begin gathering the required data.

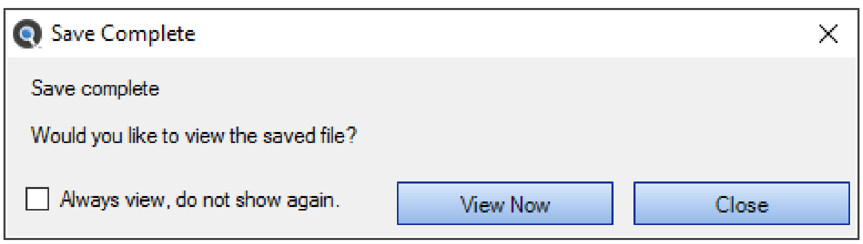


14. Once complete, a **Save As** dialog will appear. See example below:

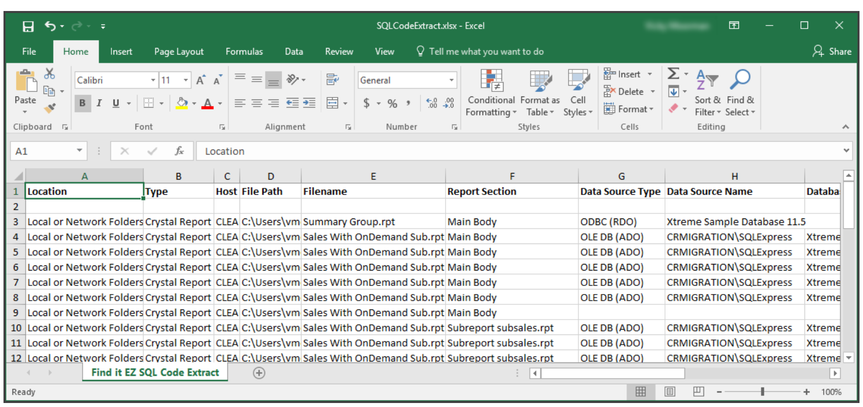


15. Save the report:
    a. Modify the **File name** as desired.
    b. Navigate to the desired folder location.
    c. Click on the **Save** button.

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



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

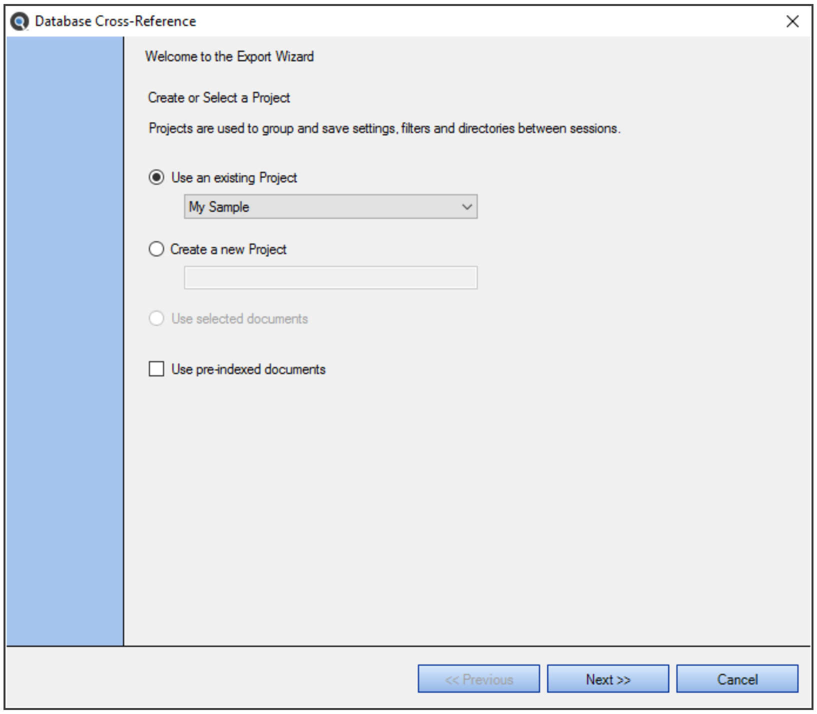


Report data will include the following:

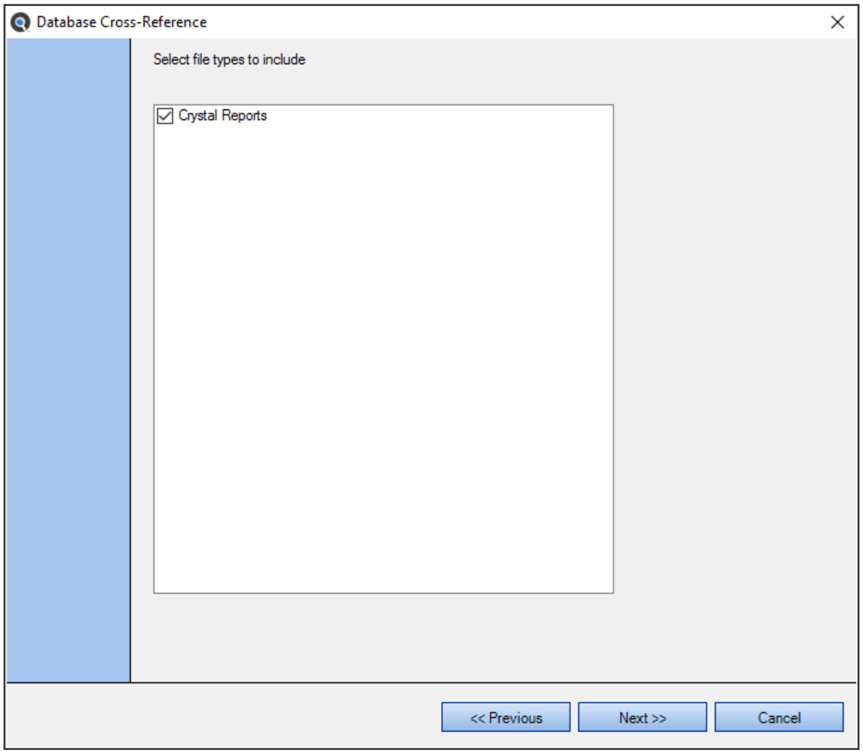
- Location
- Type
- Host
- File Path
- Filename
- Report Section
- Data Source Type
- Data Source Name
- Database
- Owner
- Report Table
- Call Statement
- Table Links
- SQL Command
- SQL Expressions
- Underlying Database Code

Create a Database Cross-Reference List

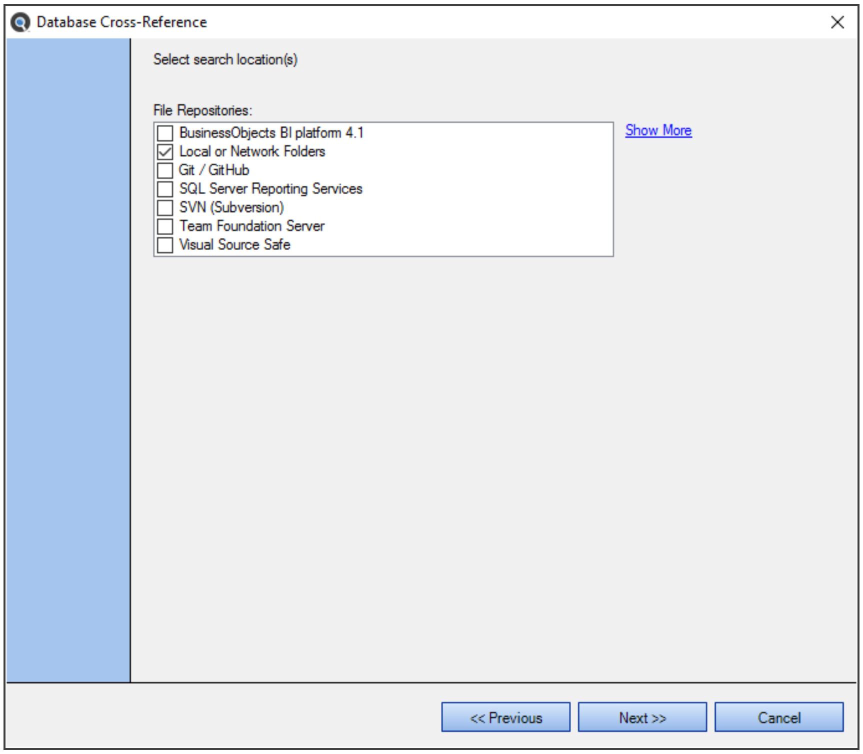
1. Launch the Export Wizard for Database Cross-Reference:
   a. Using the Search Wizard:
      i. At the top, left of the main window, click on the **Search Wizard** button. The **Search Wizard** dialog will appear.
      ii. Click to choose the **Create a database cross-reference for my reports** option. The **Export Wizard** will appear.
   b. Using the menu:
      i. From the Find it EZ menu, select **Document -> Business Intelligence -> Database Cross-Reference**. The **Export Wizard** will appear. See below:



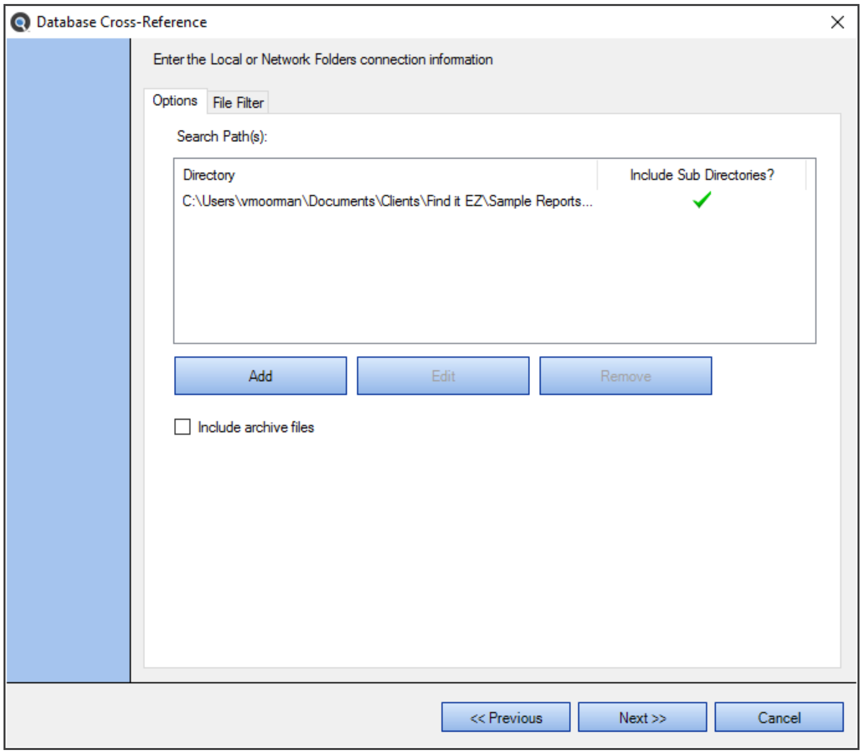
2. **See:** "Create or Select a Project" on page 35.
3. Click on the **Next >>** button to continue.



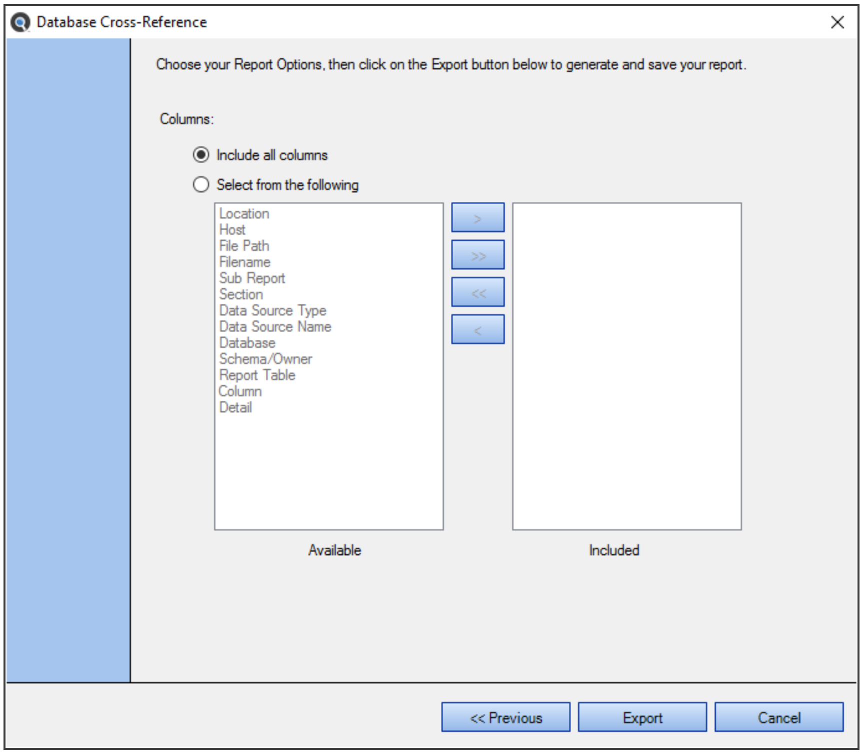
4. Click to select the file types to include. See: "Select File Types to Include" on page 36.
5. Click on the **Next >>** button to continue.



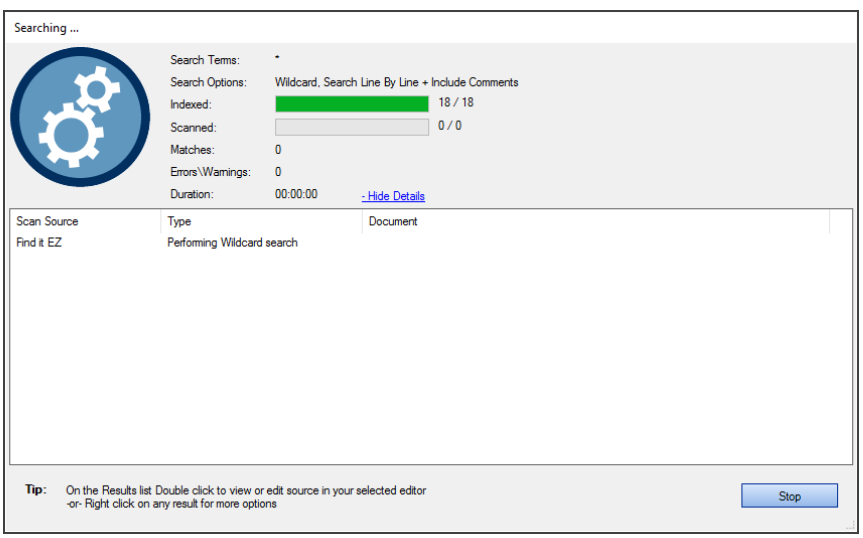
6. Click to select the desired search locations. See: "Select Search Location(s)" on page 37.
7. Click on the **Next >>** button to continue.



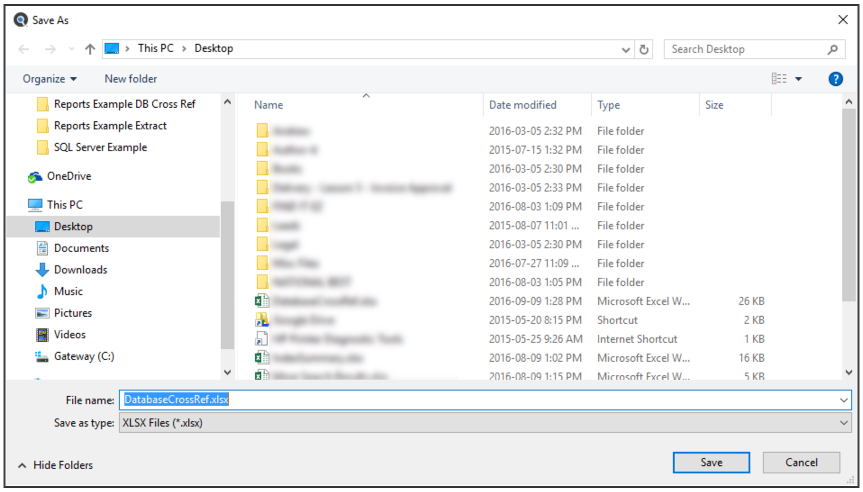
8. Enter the file location connection information. See:
    - "Add or Edit Search Path(s)" on page 76
    - "Apply File Filter" on page 77
    - "Include Archive Files" on page 77
9. Click on the **Next >>** button to continue.



10. Choose report options. See: "Choose Report Options and Export Report" on page 52.
11. Click on the **Export** button. Find it EZ will begin gathering the required data.

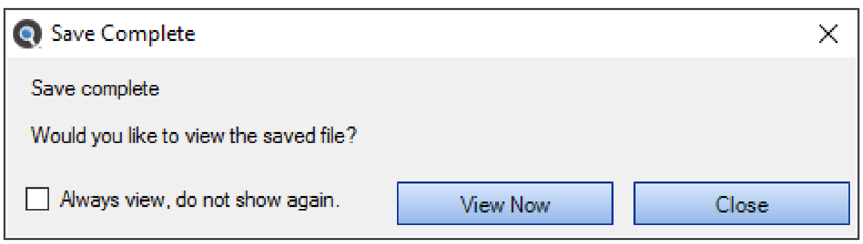


12. Once complete, a **Save As** dialog will appear. See example below:

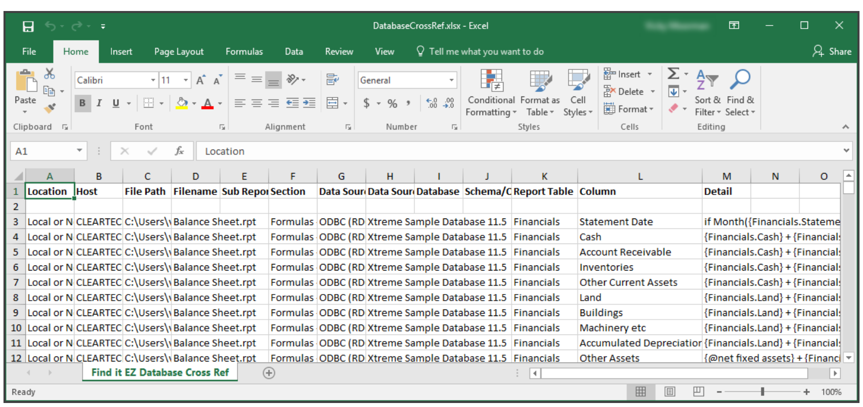


13. Save the report:
    a. Modify the **File name** as desired.
    b. Navigate to the desired folder location.
    c. Click on the **Save** button.

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



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



Report data will include the following:

- Location
- Host
- File Path
- Filename
- Sub Report
- Section
- Data Source Type
- Data Source Name
- Database
- Schema/Owner
- Report Table
- Column
- Detail

See Also:

- "Navigation" on page 13
- "Search Locations and Source Settings" on page 75
- "Searching Window" on page 68
- "Set User Options" on page 21
- "Viewer / Editor Settings" on page 28

Troubleshooting

This section will provide solutions to some workstation and environmental issues.

Identify reports using a specified connection

You may, for example, want to try to determine if there are Crystal Reports making an ODBC connection to certain environments. Here's how you can do it using Find it EZ:

There are a couple of ways you can do this.

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

- In the **Source** Panel in the **Report Utilities** section, click to check the Crystal Reports source
- Click to check the **Include Crystal Reports** check-box
- Open the Crystal Reports project settings: from the menu, select **Projects -> Settings -> Crystal Reports**
- In the **Search** section, click to check the **Data Source and Connections** option

Then,

- (A) Good - Do a Boolean search for {ODBC} AND {DSN}; where DSN is your DSN. That should find all of the reports with that connection.
- (B) 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 60
- "Create a SQL Statements Detail Extract" on page 144

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

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-checked (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.

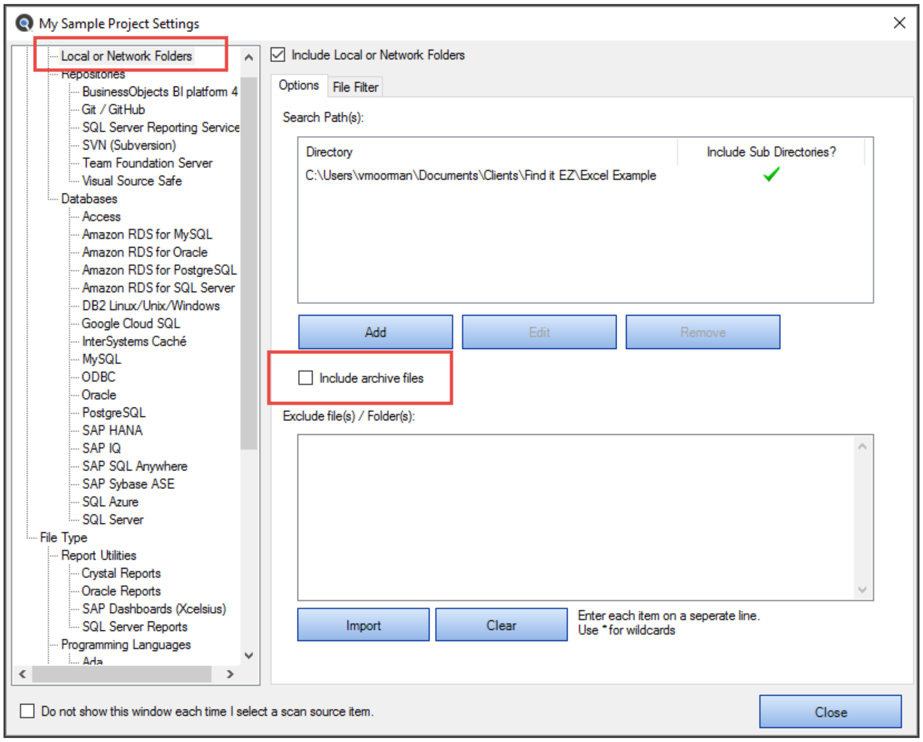
Use of 7-Zip has been denied by your Administrator

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

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.

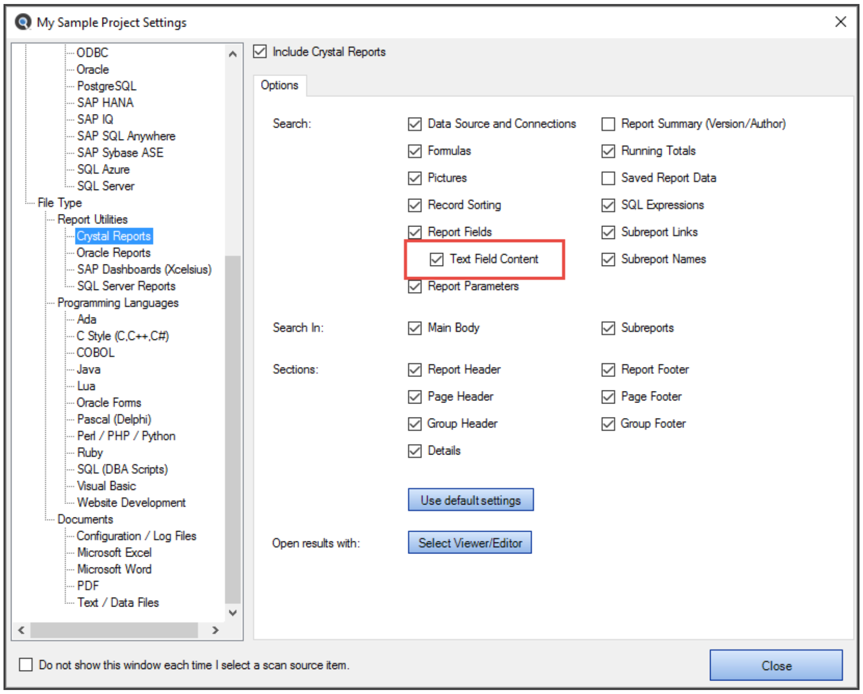


If a system administrator enforces a rule disallowing use of the 7-zip program, then either this restriction has to be removed by the sys admin OR the end-user cannot search those particular document types with Find it EZ unfortunately. Note that the end-user may even get this message when attempting to install Find it EZ. They 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. Close the **Search Wizard** if you are using it (click on the **Cancel** or **X** button).
2. On the **Source** panel (on the left), click on "Crystal Reports." This will bring up the **Project Settings** for Crystal Reports. Alternatively, you can get to this window from the menu as follows: **Projects -> Settings**, then click on "Crystal Reports."



3. Click to check the **Text Field Content** option.
4. Click on the **Close** button.
5. The next time a search is done it should look through the text box content for you.

List of VSS folders slow to load

When configuring a Visual Source Safe in particular, retrieving a list of folders to search within a selected branch can take a long time to load. This can also be the case with other source code version control systems.

Solution:

Rather then using a native connection to the version control system within Find it EZ project source settings, alternatively, you can recursively pull a copy of a branch using the native version control system client to save a temporary copy of all folders and files to your local workstation where Find it EZ is installed. Then, configure searching the local copy of the documents rather then a connection to the version control system source within your Find it EZ project. This will eliminate the overhead and latency with use of the vendor connector API as well as any possible network bottlenecks when retrieving remote folders and documents. The downside to this alternative is that you would have to ensure you refresh your local copy of files as needed. However, Find it EZ indexing / index refresh will be dramatically improved using this two step approach.

Find it EZ Support

This section describes the many support options available with Find it EZ, how to send feedback, report a bug, or a request a feature to Find it EZ Software Corp., and to view or send your session log.

Support Options

Support Option	Navigation
Contact Find it EZ Software Corp	https://www.finditeztest.com/support/#contact
Frequently Asked Questions	https://www.finditeztest.com/support/#faq
Search Knowledge Base	https://www.finditeztest.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**.

Report a Bug or Request a New Feature

From the program:

1. From the Find it EZ menu, select **Help -> Report a Bug**.
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" above.
3. Click on the **Submit Bug** button.

On the website:

> **See:**"Create a Support Ticket" on page 175

My Find it EZ Account

This section describes how to register for and manage your Find it EZ account, access software downloads, and manage serial numbers, quotes, orders, support tickets, and sending feedback.

My Account

The **My Account** tab on the member website allows you to manage your contact information, update alerts, subscriptions, and change your password. This section will describe how to register for and log in to manage your Find it EZ account.

Once registered, you can log in to the secure member area of Find it EZ, where you can change your password, download product updates, update your email subscriptions, retrieve product activation keys, view order history, process payments, check on the status of or submit new support tickets.

Register for a free Find it EZ member account:

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.

Log In to Your Find it EZ Member Account

To log in to your Find it EZ member 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.

Update Account Details and Preferences

1. On the **My Account** tab, make changes as desired.
2. Click on the **Update** button to save.

Change Account Password

1. On the **My Account** tab, click on the **Change Password** button. A **Change Password** dialog box will appear.
2. Enter and confirm the new password.
3. Click on the **Update** button to save your changes.
4. Click on the **X** button to close the **Change Password** dialog box.

See Also:

- "Manage Linked User Accounts" on the next page
- "Manage Company Address Records" on the next page

Manage Linked User Accounts

Add New Account Admin Contact

1. Log in to your Find it EZ Member Account. See: "My Account" on the previous page
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.

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 **Close** or **X** button to exit.

Change Prime Account Contact

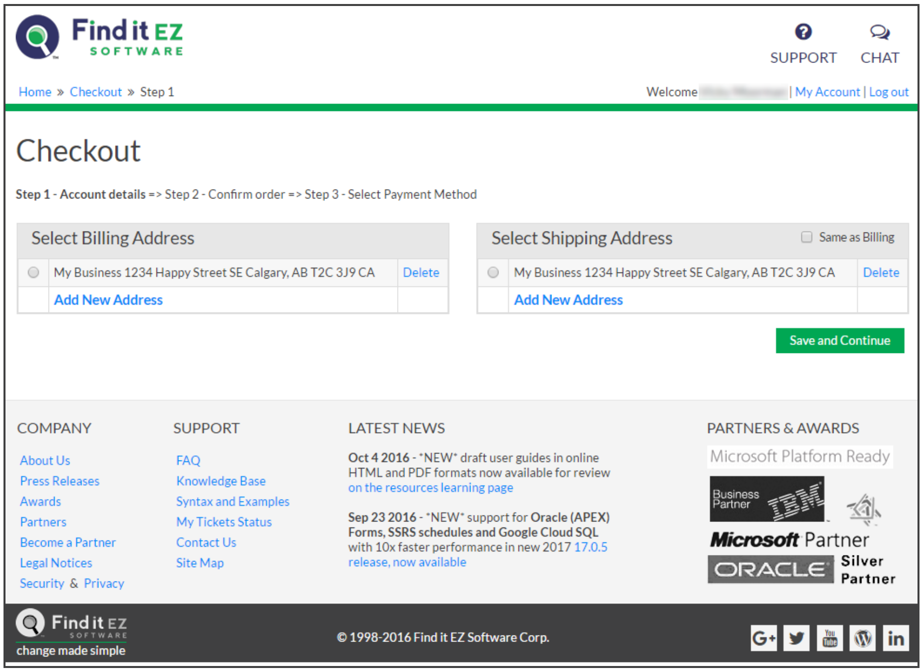
1. Log in to your Find it EZ Member Account. See: "My Account" on the previous page
2. On the **My Account** tab, scroll down to locate the **Linked User Administration** section.
3. In the **Prime Contact** column, click to choose the new prime/admin contact.
4. Click on the **Change Prime Contact** button to save your change.

Remove an Account Contact

1. Log in to your Find it EZ Member Account. See: "My Account" on the previous page
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. See: "My Account" on page 163
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.
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. See: "My Account" on page 163
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. See: "My Account" on page 163
2. On the **My Account** tab, scroll down to locate the **Address List** section.
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.
6. To cancel, click on the **No** button.

See Also:

- "Manage Linked User Accounts" on page 164

Software Downloads

The **Software Downloads** tab on the member website allows you to download new releases and connectors and to view release notes and system requirements.

Download Release Version

1. Log in to your Find it EZ Member Account. See: "My Account" on page 163
2. Click to select the **Software Downloads** tab. A list of product releases and optional connectors will appear.
3. Locate the product and release version that you want to download.
4. In the **Version** column, click on the product release number for the corresponding product row. The release will begin to download.
5. Locate and launch the *.exe file. 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.

See Also:

- "Download Connectors" on the facing page
- "View Release Notes" below
- "View System Requirements" on the facing page

View Release Notes

From the Program:

1. From the Find it EZmenu, select **Help -> View Release Notes**. **Release Notes** will open in a new browser window showing the most recent information first.
2. Scroll down to view historical notes.
3. To close **Release Notes**, close the browser tab or window.

On the Website:

1. Log in to your Find it EZ Member Account. See: "My Account" on page 163
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 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.
5. Scroll down to view historical notes.
6. To close the **Release Notes** dialog box, click on the **X** button.

View System Requirements

On the Website:

1. Log in to your Find it EZ Member Account. See: "My Account" on page 163
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.

See Also:

- "Download Release Version" on the previous page

Download .NET Framework

Alert: The .NET framework connector is required. If you do not have the required .NET 4.5 pre-installed, you will be prompted to download this prerequisite from Microsoft. We provide an alert and link to the appropriate download page depending on the Windows operating system you are running. The program will not launch until .NET 4.5 is installed.

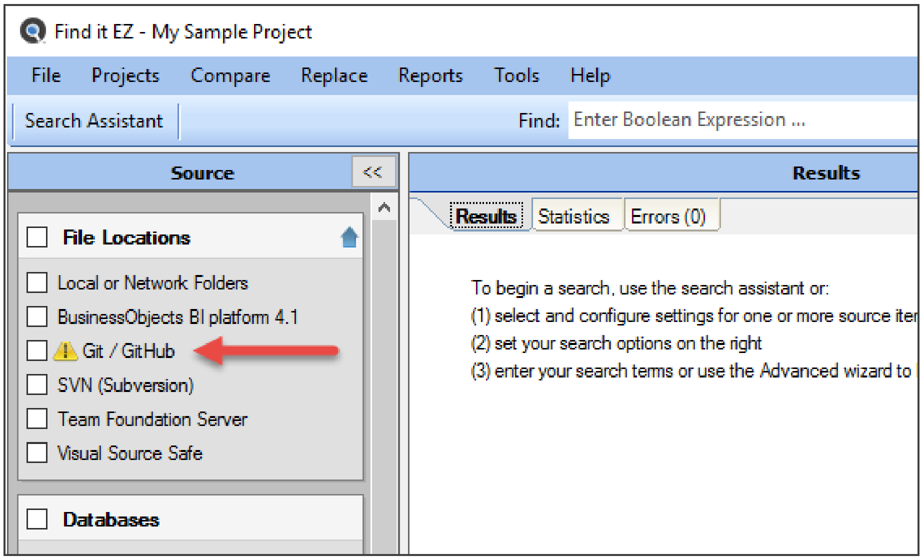
On the Website:

1. Log in to your Find it EZ Member Account. See: "My Account" on page 163
2. Click to select the **Software Downloads** tab. A list of product releases and optional connectors will appear.
3. Locate the product release for which you want to download the .NET framework.
4. In the **.net** column, click on the corresponding .NET version number. A **Microsoft.NET Framework** dialog box will appear.
5. To download the selected version from the Find it EZ server, click on the **Download Now** button. OR
6. To download the selected version directly from Microsoft, click on the **directly from Microsoft** link.
7. To close the **Microsoft.NET Framework** dialog box, click on the **Close** or **X** button.

Download Connectors

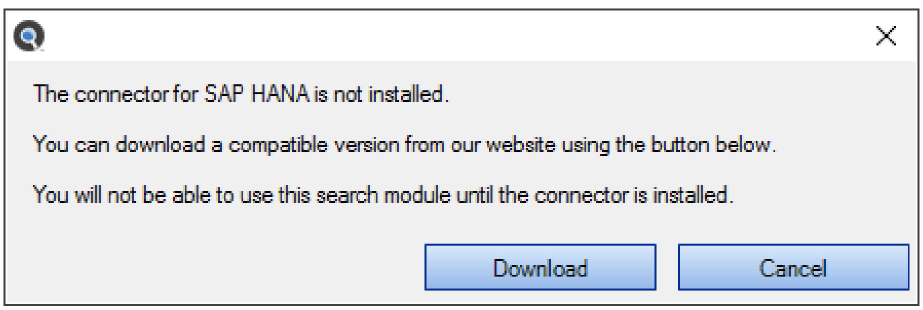
Source items that require a connector will appear with a small warning icon preceding the name. See example below:

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



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

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



From the Program:

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

1. From the Find it EZ menu, select **Tools -> Download Connectors -> [Connector Name]**. A **Download Connector** dialog will appear.
2. Where applicable, click on the **Proxy Settings** button. A **Proxy Settings** dialog will appear.
    a. Enter your proxy credentials for the selected connector.

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

    b. When settings are complete, click on the **OK** button to save.
3. Click on the **Download & Install** button. The connector will begin downloading.
    a. Once downloaded, a Find it EZ **InstallShield Wizard** will appear.
    b. Click on the **Next** button.
    c. Read and follow the instructions provided.
    d. When complete, click on the **Finish** button.

On the Website:

1. Log in to your Find it EZ Member Account. See: "My Account" on page 163
2. Click to select the **Software Downloads** tab. A list of product releases and optional connectors will appear.
3. Locate the product release for which you want to download a connector.
4. In the **Download Optional Connectors** section of the table, click on the corresponding version number in the desired connector name column. A **Connector Details** dialog box will appear.
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), click on the **directly from Microsoft** link or directly from SAP (i.e. Crystal Reports), click on the **directly from SAP** link.
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.

See Also:

- "SAP Repositories - Compatibility Table" below

SAP Repositories - Compatibility Table

Below is a compatibility table for SAP repositories:

BI 4.1

- BusinessObjects BI platform 4.1
- BusinessObjects BI platform 4.0
- Crystal Reports Server 2013
- Crystal Reports Server 2011

XI 3.1

- BusinessObjects Enterprise XI 3.1
- BusinessObjects Enterprise XI 3.0
- Crystal Reports Server 2008

Serial Numbers

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

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

On the Website:

1. Log in to your Find it EZ Member Account. See: "My Account" on page 163
2. Click to select the **Serial Numbers** tab. A list of your product licenses will appear.

View or Transfer Current License

On the Website:

1. See "Serial Numbers" on the previous page
2. Locate the product for which you want to view or transfer the current license.
3. Click on the corresponding **Details** link. A **View/Transfer License** dialog box will appear.
4. To download the most recent upgrade, click on the **[version upgrade]** link.
5. To transfer the license to a new machine, click on the **Transfer to new machine** link.
6. To close the **View/Transfer License** dialog box, click on the **X** button.

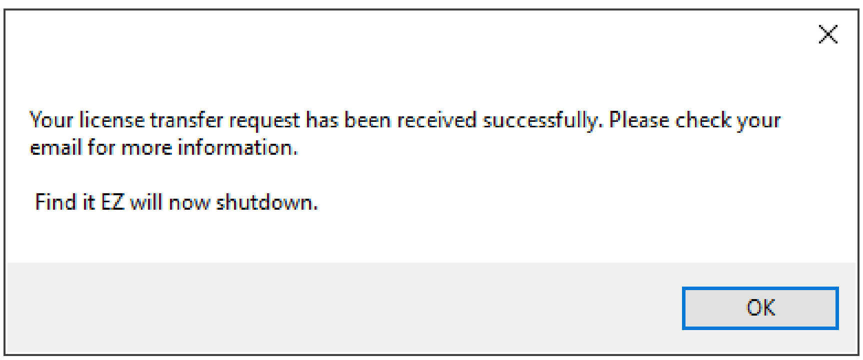
See Also:

- "Download Release Version" on page 166
- "Transfer to a New Machine" below
- "Enter New Serial Number" on the facing page

Transfer to a New Machine

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.
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. See: "My Account" on page 163
2. Click to select the **Serial Numbers** tab.
3. Locate your active license in the list and click on the corresponding **Details** link. A **View/Transfer License** dialog box will appear.
4. Click on the **Transfer to new Machine** link. Our support staff will then automatically receive a transfer request to approve. Once that has been completed, you will receive an approval email and you can then re-use the license on the new workstation.

See Also:

- "Download Release Version" on page 166.

Enter New Serial Number

From the Program:

1. From the Find it EZ menu, select **Tools -> License Management -> Enter a new serial number**. The **Activate** dialog box will appear.
2. Fill in the required information.

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

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

See Also:

- "Activate License" on page 8
- "Serial Numbers" on page 169

Get a New Trial License

On the Public Website:

1. Visit **https://www.finditez.com/**.
2. Click to select the desired product edition tab.
3. Click on the **Download Now!** button.

On the Member Website:

1. Log in to your Find it EZ Member Account. See: "My Account" on page 163
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:

- "My Account" on page 163
- "Activate License" on page 8
- "Activate License Manually" on page 9

Purchase Licenses

1. See "Serial Numbers" on page 169
2. Locate the product edition for which you want to purchase more licenses.
3. In the **Buy More** column, click on the corresponding shopping cart icon.
4. Enter the desired **Quantity**.
5. In the **Add Software Assurance** section, choose an assurance option.
6. Click on the **Add to Quote** button. You will be directed to the **Quote Summary** page.
7. To add more items, click on the **+ Add More Items** button.
8. To edit or delete an item, click on the corresponding icon located to the right of each item.

9. Where applicable, enter a discount code and click on the **Apply Coupon** button.
10. To send the quote to Find it EZ Software Corp, click on the **Send Quote** button.
11. To buy the selected product(s) now, click on the **Checkout** button.

**Note to Ken: Wondering if we should change the heading here to "Purchase Additional Licenses." Also, would you like me to include an "On the Public Website" procedure and the above "On the Member Website" procedure... ?

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 177

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. Locate the product that you want to add to a quote.
4. Click on the corresponding **Add to Quote** button. A **Quote Summary** page will appear.
5. To add more items, click on the **+ Add More Items** button.
6. To edit or delete an item, click on the corresponding icon located to the right of each item.

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.

View Saved Quotes

1. "Log In to Your Find it EZ Member Account" on page 163.
2. From the menu at the top of the page, select **Quotes -> My Saved Quotes**. A table will appear showing the quote **Order #**, **Expiry Date**, **Amount**, and **Status**.
3. To edit the quote, click on the corresponding **Edit** icon.
   a. Make changes as desired.
   b. Click on the **Update Quote** button to save and send to Find it EZ Software Corp.
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. See "View Saved Quotes" above.
2. Locate the quote 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** 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.
7. Click on the **Process Payment** button.

See Also:

- "Find it EZ Product Editions" on page 1

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 My Orders

1. Log in to your Find it EZ Member Account. See: "My Account" on page 163
2. Click on the **Orders** tab. All current orders on file will be listed.

Create a New Order

1. Click on the **Create New Order** button. The **Products Catalog** will appear.
2. Locate the product(s) you want to add to your order.
3. To select a product, click on the **Add to Cart** button. Go to step 6.

4. To select product options, click on the corresponding **Select Options** button.
    a. Enter the desired **Quantity**.
    b. Choose the desired **Software Assurance** plan.
    c. Click on the **Add to Cart** button.
5. To add more items, click on the **+ Add More Items** button.
6. To edit or delete an item, click on the corresponding icon located to the right of each item.
7. Where applicable, enter a discount code and click on the **Apply Coupon** button.
8. To save the order as a quote, click on the **Save as quote** button.
9. To pay for the order, click on the **Checkout** 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

To create a support ticket:

1. Log in to your Find it EZ Member Account. See: "My Account" on page 163
2. Click on the **My Support Tickets** tab.
3. Click on the **Create a Support Ticket** button. A **Ticket System** dialog box will appear.
4. In the **Product Information** section:
    a. Select the affected product name from the **Product** drop-down list.
    b. Select the affected version from the **Version Found** drop-down list.
5. In the **Problem Description** section:
    a. Select the appropriate issue severity from the **Severity** drop-down list. Refer to the image below:

    Critical: The software crashes, hangs or causes you to loose data
    Setup: A data conversion, personal computer configuration or installation issue
    Support: Request for technical assistance or 'how do I?' training request
    Normal: It's a bug that should be fixed
    Minor: Loss of function, but there is an easy workaround
    Trivial: A cosmetic problem, such as a misspelled word or misaligned text
    Enhancement or Change: Request for a new feature, better performance, or functional changes
    Feedback: Product reviews or contest entries

    b. In the **Summary** text box, enter a brief and descriptive summary of the issue or problem.
    c. In the **Description** text box, enter a detailed description of the issue or problem.
    d. In the **Steps to Reproduce** text box, thoroughly describe the steps required to reproduce the issue or problem. Include as much detail as possible.
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. See: "My Account" on page 163
2. Click on the **My Support Tickets** tab. A list of your submitted support tickets will appear showing the **Issue #**, **Reported** date/time, **Status**, **Last Updated** date/time, and **Summary**.

   Note: It may take up to 24 hours for new issues to appear in this list.

See Also:

- "Find it EZ Support" on page 162
- "Send Feedback" below

Send Feedback

To provide feedback to Find it EZ Software Corp., follow these steps:

1. ***From the program:***
   a. From the Find it EZ menu, select **Help - Send Feedback**. You will be directed to the Find it EZ website.
   b. To log in to the Find it EZ member site, enter your account e-mail address and password and click on the **Login** button or press the **[Enter]** key on your keyboard. The member site will appear with the **Feedback** tab selected.
2. ***On the website:***
   a. Log in to your Find it EZ Member Account. See: "My Account" on page 163
   b. Click on the **Feedback** tab.
3. Enter or confirm your company and/or personal information on the form.

   Note: Items with dots are required. Abbreviations can be used for anonymity.
4. Enter your feedback into the **Comments** text box (max. 250 characters).
5. If more space is needed, enter more feedback into the **More Space Needed?** text box.
6. Click on the **Send Feedback** button. A confirmation message will appear to confirm your feedback has been sent.

See Also:

- "My Account" on page 163
- "Create a Support Ticket" on the previous page
- "Find it EZ Support" on page 162

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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