



College of Medicine

## Operations Manual

### Desk Procedure – Cross cabinet searching

**Date:** 11/05/13

**Process Owner:** COM ITS – Records Management

**Purpose:** To provide an overview of operating cross cabinet searching in DocuWare.

**Contact:** [Mike Jean](#) or [Jennifer Yelich](#)

### Definitions and Responsibilities

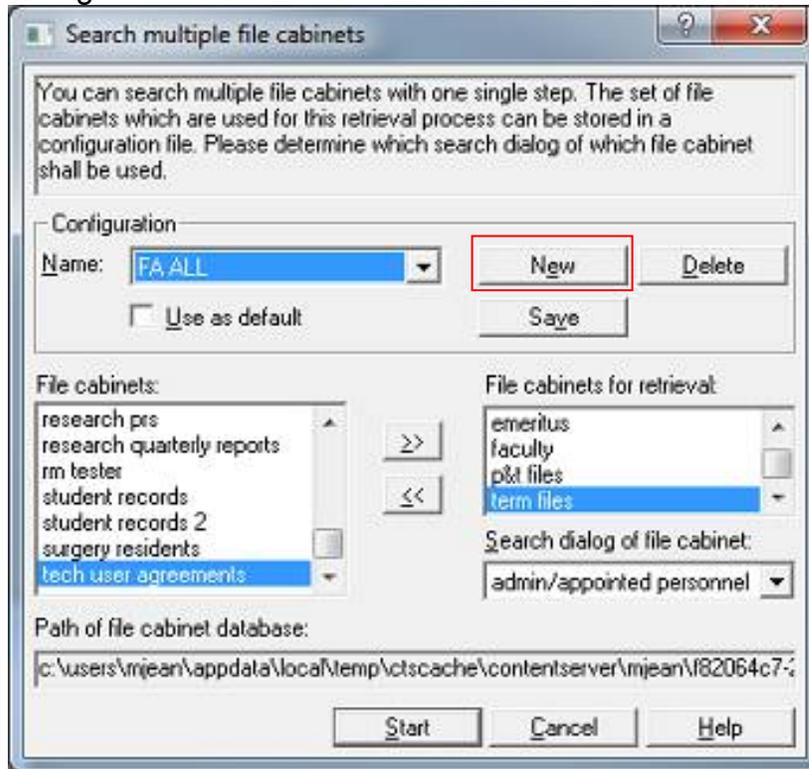
#### Tools and Resources:

DocuWare

#### Overview:

This procedure will provide instructions on performing a search across multiple file cabinets at once. This is helpful for users who have access to multiple departmental file cabinets. In order for a cross cabinet search to work, it's important to note that file cabinets require special set up upon creation to allow cross searching capability.

1. Right-click on any of your file cabinets that allow for cross cabinet searching and choose **'Search multiple file cabinets'** to open the search configuration box.



2. You will need to create a search template by click the 'New' button.  
**NOTE:** You are limited 8 characters when naming a template.



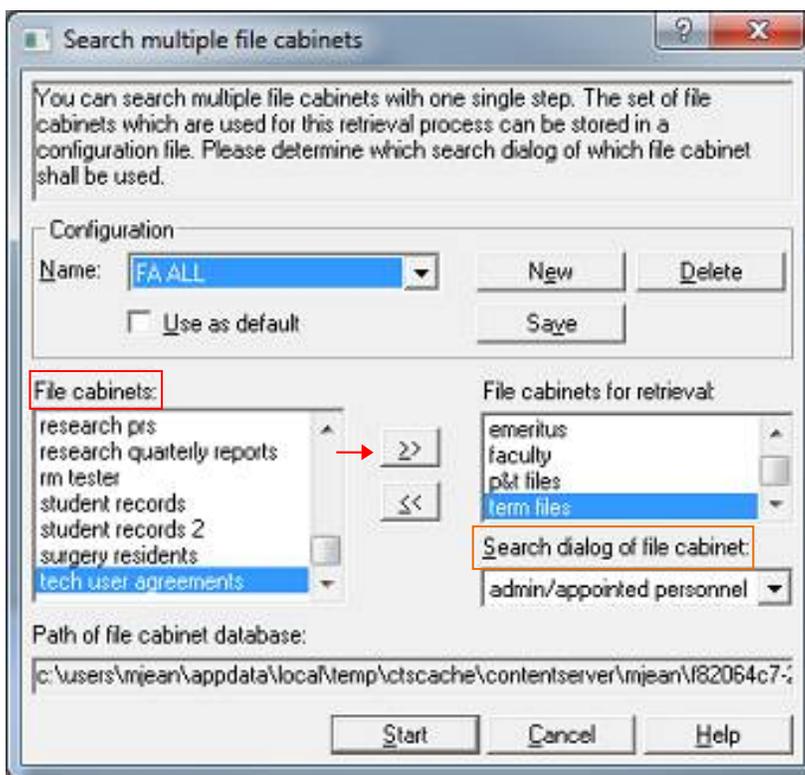
3. After naming your template you will be returned to the configuration box show in Step 1 above. You will need to choose which file cabinet you want to search with this template, as well as which of your multiple file cabinets' search dialogs you want to be your primary search dialog.

a. **File cabinets selection**

- Highlight the cabinets on the left to select them and use the arrow buttons in the middle to move them to the right to compile your file cabinet search list for retrieval.
- You can also remove file cabinets from your listed options by pushing them back over to the left.

b. **Search dialog of file cabinet**

- Here you're basically defining which Search Dialog you want to be your primary search engine.



4. When you have your file cabinets and desired search dialog selected click the Save button to save your settings.
5. Next time you need to perform a cross cabinet search you can right-click on any of your file cabinets and choose '**Search multiple file cabinets**'. Be sure to select your template name before clicking the Start button to begin your search.