

# DataTree<sup>®</sup> ACADEMY

## FLEXSEARCH

Rev. 20201015



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## Overview

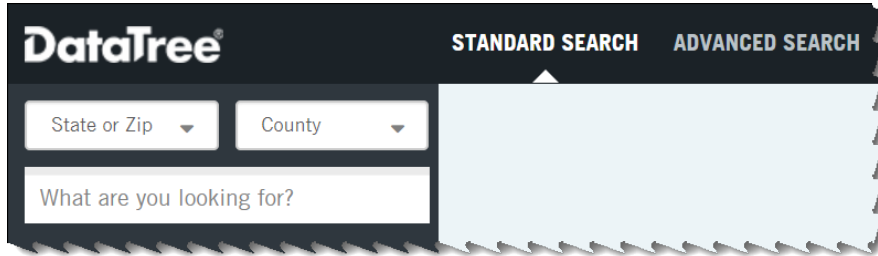
DataTree has a document image repository of billions of OCR'd documents with exceptional historical depth.

The OCR process results in documents that are searchable at the character. Using FlexSearch, documents can be searched for a word, phrase, number, title, etc., and the relevant document retrieved and ordered. Since FlexSearch is looking at the document contents it is not saddled with a mandatory geographic filter requirement. So, while you can use geographic filters, they are not mandatory as a starting option.

FlexSearch provides two ways for you to query documents: **Standard** and **Advanced Search**.

## Standard Search:

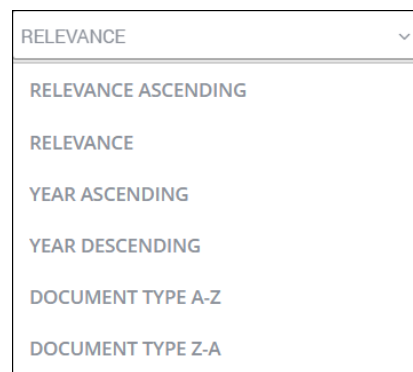
Enter any text you are searching for. This could be a street name, business name, notary, loan officer, phrase, phone numbers, document numbers, etc. The geography is not required. Press enter and FlexSearch will return a list of documents in descending relevance order.



Standard search will allow you to cast a wide net by using a general word or phrase and then you can narrow your search after you see the total universe of possibilities. You can also include quotes to help narrow the search to specific phrases.

Entry:	How this will be used in the search:	
Corte Madera	Corte or Madera or Corte Madera Madera Corte	This is treated as an “or” condition where FlexSearch will treat each word supplied as an independent search criteria and look for any combination or solo entry.
“Corte Madera”	Corte Madera	An exact match.
“A Kern” “Notary Public”	A Kern and Notary Public	An exact match for both phrases and both phrases must be in the document.

Once the results list is returned, the list can be sorted.



## FILTERS

### COUNTIES

- SHOW ALL COUNTIES
- MARIN (92,985)
- SAN MATEO (10,197)
- CLARK (6,672)

MORE

### DOCUMENT TYPES

Sort [alphabetically](#) or by [volume](#)

- SHOW ALL DOCUMENT TYPES
- DEED OF TRUST (36,057)
- UNDETERMINED (35,665)
- DEED (32,941)

MORE

### STATES

- SHOW ALL STATES
- CA (146,858)
- NV (6,992)
- AZ (2,296)

MORE

### YEARS

- SHOW ALL YEARS
- 2019 (1,225)
- 2018 (3,224)
- 2017 (3,491)

MORE

After the records are returned, an additional set of filters will display allowing you to add or remove filters at will to narrow your search. FlexSearch will automatically adjust the returns on the fly.

The count next to each filter entry indicates the number of records associated with that filter entry.

Simply select or deselect the checkboxes to apply the filters. FlexSearch will automatically filter the documents for you.

## Advanced Search:

Advanced Search allows pre-filtering by your word or phrase, geography, document type and recording year. Additionally, the filters provide the ability to exclude options as well as setup modifiers such as “contains”, “starts with” or “near”.

Enter your selections and click the plus sign to the right of each option to add it to the Query. When you’re ready, click Search at the bottom right.

The screenshot displays the 'ADVANCED FLEXSEARCH' interface. On the left is the 'QUERY EDITOR' with a text area containing '(doc\_full\_text:judgment) AND (doc\_type\_search:ORDER)' and 'Clear' and 'Search' buttons. The main area is titled 'ADVANCED FLEXSEARCH' and includes 'HOW TO BUILD A QUERY' instructions. Below this is the 'QUERY BUILDER' section with four filter categories: 'DOCUMENT TEXT' (Full Text), 'PROPERTY IDENTIFIER' (State/County), 'DOCUMENT IDENTIFIER' (Document Type), and 'Recording Year'. Each category has dropdown menus for operators and search terms, with plus signs to add filters. A 'Query Editor' window is overlaid on the left, showing the current query. A list of document types is shown on the right, with 'Abstract Of Judgment' highlighted. A green arrow points to the plus sign next to the 'Document Type' filter.

**QUERY EDITOR**

```
(doc_full_text:judgment)
AND
(doc_type_search:ORDER)
```

Clear Search

**ADVANCED FLEXSEARCH**

**HOW TO BUILD A QUERY**

Advanced FlexSearch gives you the power to search billions of public record document images exactly how you want to search, so you can discover the documents that contain the precise information you need. Start by creating your Advanced FlexSearch with these easy steps.

1. Create a filter using any of the three main dropdown options and search term text boxes
2. Add as many filters as you desire to the Query Editor by clicking +
3. Review and Modify your customer query in the Query Editor
4. Run your FlexSearch!

**QUERY BUILDER**

**DOCUMENT TEXT**

Full Text contains does not contain Search Term +

**PROPERTY IDENTIFIER**

State/County is is not State County +

**DOCUMENT IDENTIFIER**

Document Type contains all words Select +

**Recording Year**

is before after on between +

Abandonment  
Abstract Of Judgment  
Acknowledgement  
Addendum  
Affidavit  
Affidavit Of Death  
Agreement  
Amendment  
Annexation

By using Advanced Search you can setup all your filters first and then see what the returns are. Filters can always be changed and your query re-run.

## Running FlexSearch from the Subject Property Tab

The Subject Property tab has links allowing you to run FlexSearch directly from the tab using the property address as the search parameter.

Clicking on the **RUN FLEXSEARCH FOR...** link will launch a FlexSearch window and pass the address to FlexSearch for parsing. Any documents found matching that street address will be returned and can be ordered or additional filtering applied.

