

Perform a Search

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<https://www.cottsystems.com/recordhub-training>

What is the Simple Search?

The Simple Search is the default search and is more of a broad search meaning you are using less filters in your initial search.

The search will retrieve all documents containing the search

values you entered no matter what field contains that value. This type of search provides you the most assurance of finding what you are looking for. This type of search typically renders more results. However, once the results are displayed, you can apply additional filters to further narrow and define your search results.

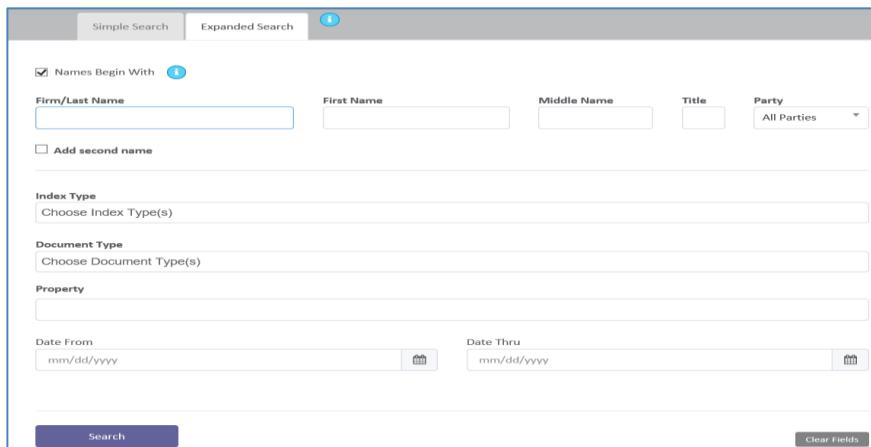


Features of this Search

Search Details
The Simple Search requires an EXACT match, it is not a 'Begins With' search. This means if you type <i>John</i> , documents containing 'Johnathan' will not be retrieved.
This search uses the AND logic meaning it looks at every field in the document for your search value. When you type <i>John Smith</i> , any document containing John or Smith anywhere in the document will be retrieved. For example, a document with a party name of John Thomas with property Smith Addition would qualify.
If you are unsure how to spell something, you can apply the wildcard by typing an asterisk (*) at the end of the word. This would provide a 'begins with' type of search. Valid examples of a wildcard search could be <i>Jo*</i> or <i>Jo* Smith</i> (a space follows the asterisk when another value will follow like in the case with <i>Jo* Smith</i>). Another example would be <i>J* H</i> and <i>J* H*</i> . To use the wildcard, you must adhere to the following: <ul style="list-style-type: none"> ○ Use the asterisk at the <u>end</u> of a word. You cannot use it in the first position or in the middle of a word. ○ When using multiple words, you must use a space after the asterisk and before the next word. ○ At least 2 characters must be used in the wildcard search. For example, you cannot search <i>J*</i> by itself but you can search <i>J* H*</i>.
With this one field search technology, you can search by name, property information, book and page, file number or any piece of information that would appear anywhere on a document.
When searching an amount, you are not required to enter the \$ sign. However, if the amount appears in the description/remarks field on a document you must enter it with or without the \$ sign exactly as it was recorded.
You can request to search for your values in one specific field by putting a double quote at the beginning and end of your criteria. For example, typing " <i>John Smith</i> " would only return documents where <i>John Smith</i> was together in the same field such as in the name field. Documents where John Anderson is in the name field and Smith Addition is in the property field would not qualify. When using brackets {}, [], or () in quotes, the system will ignore the brackets altogether.

What is the Expanded Search?

The Expanded Search is a more specific search because it allows you to search for specific values in specific fields and will allow searching multiple fields at the same time. It also provides both a 'Begins With' name search and a 'Contains' name search.



The screenshot shows the 'Expanded Search' interface. At the top, there are tabs for 'Simple Search' and 'Expanded Search'. Below the tabs are several search fields and filters:

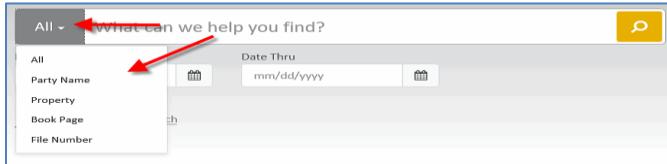
- Firm/Last Name:** A text input field with a dropdown arrow.
- First Name:** A text input field.
- Middle Name:** A text input field.
- Title:** A text input field.
- Party:** A dropdown menu set to 'All Parties'.
- Index Type:** A dropdown menu labeled 'Choose Index Type(s)'.
- Document Type:** A dropdown menu labeled 'Choose Document Type(s)'.
- Property:** A text input field.
- Date From:** A date input field with a calendar icon, showing 'mm/dd/yyyy'.
- Date Thru:** A date input field with a calendar icon, showing 'mm/dd/yyyy'.

At the bottom of the interface are a 'Search' button and a 'Clear Fields' button.

Features of this Search

Field	Information
Name Begins With check box	<p>This feature is on by default. It will retrieve documents having names that start with the value you entered. When this box is unchecked, the search will retrieve documents having names that <u>contain</u> the value you entered.</p> <ul style="list-style-type: none"> Example when this feature is activated - The name <i>Nation</i> is searched. The search will retrieve anything that has a name that starts with 'Nation'. It will also retrieve names like National City Bank and Nations Bank. Example of this feature deactivated - The name <i>Nation</i> is searched. The search will retrieve anything that contains 'Nation' at the beginning of the name or appears anywhere in the name exactly as entered. It will also retrieve names such as First Nation Bank, National Bank, or National Logistics.
Name Fields	When searching by name you will be required to enter the last name. To apply the wildcard, you are required to type at least 2 characters in the last or first name followed by an asterisk (*). If you are unsure how to spell both last and first name, you can enter 2 characters in the last name followed by the wildcard and then enter a minimum of 1 character in the first name field followed by the wildcard.
Name Fields	Spaces and special characters are handled behind the scenes. Names such as A T & T could be located by typing ATT, AT&T, or A T & T. Names such as Smith-Jones could be found by typing Smith, SmithJones, or Smith Jones.
Party	To search for a specific party side, click the desired side.
Add Second Name	Click this box to search an additional party name. Next, choose from the following: <ul style="list-style-type: none"> AND - Use this when you want to retrieve documents that have BOTH names you entered. OR - Use this when you want to retrieve documents that contain either or both of the names you entered.
Index Type	Select the desired index type or to search multiple types, press and hold down the CTRL key on the keyboard while clicking the desired index types. If you accidentally selected a type, click the X in the index type name to remove it.
Document Type	Select the desired document type or to search multiple types, press and hold down the CTRL key on the keyboard while clicking the desired types. If you accidentally selected a type, click the X in the document type to remove it. The contents of this list is dependent upon the Index Type selected.
Property	Type the value you wish to search for in the property field. If the property is parsed out into separate fields such as subdivision, lot and block, you can choose to search by subdivision name with or without the lot and block. For example if you wanted to search Subdivision: Hawthorne Addn Lot: 1 Block: 25 , you could enter <i>Hawthorne Addn 1 25</i> (no need to enter the words 'Lot' and 'Block').
Date From & Date Thru	Select a start date, an end date or both.

How Does the Category Search Work?



- To search specifically in the party names, property, book/page, or file number fields, click the **All** button and then select the desired category.
- The category searching allows you to search something specific in a specific field. However, if you need to search for specific information in multiple fields, please use the **Expanded Search** tab.

Perform a Date Search

- To search solely by date or to limit your search to a specific date or date range, click the calendar icon at the end of the date field and select a date or, simply type the dates you wish to search. You should use slashes between month, day, and year for example, 12/31/2015. In some browsers, failure to enter the slashes will result in the date defaulting to the current day.

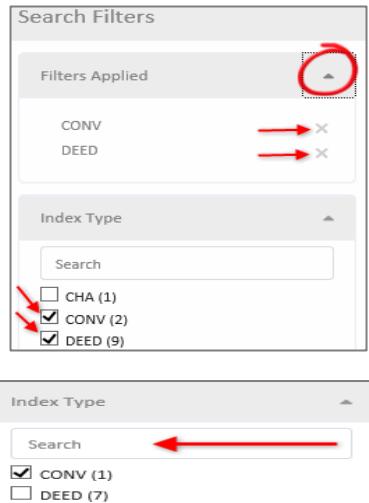


Search Results Page

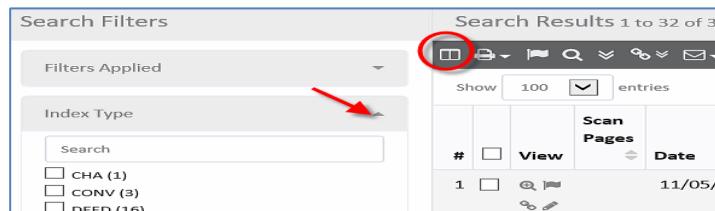
What are Search Filters and How Do They Work?

Search Filters help to narrow your search results even further. After your initial search results display you can define results even more by selecting filters in the index type, document type, party names, or year. As you click the filter(s), your search results will automatically be reflected.

- **Select a Filter** - Click the associated filter check box.
- **Undo a Filter** - Click the associated filter check box to remove the check mark.
- **View Applied Filters or Undo Filters** - Click the Expand button (down arrow button) in the Filters Applied box to show active filters. You can also undo a filter here by clicking the X beside the filter as shown in this example.
- **Search in a Filter** - To quickly locate an entry in a filter list, type the entry in the Search box of that filter list.
- **Hide a Filter List or Hide the Entire Filter Panel** - To close a filter list, click the Collapse button (up arrow button). To close the entire filter panel, click the Hide Filters icon circled in this example. You can always show the filter panel again by clicking this icon again.



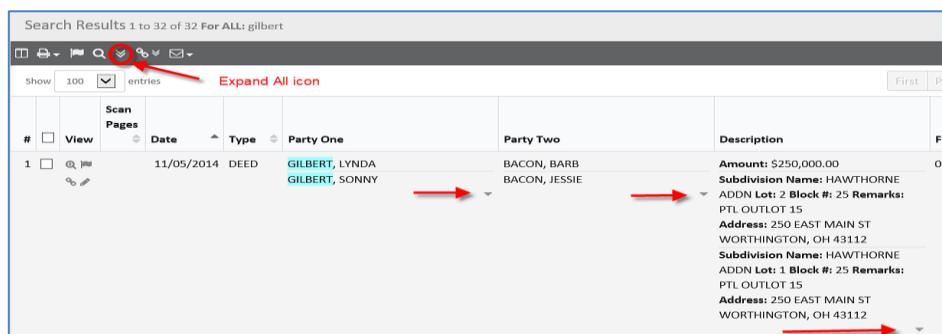
The screenshot shows the 'Search Filters' panel. The 'Filters Applied' section lists 'CONV' and 'DEED' with a red 'X' button next to each. The 'Index Type' section has a search bar and a list of filters: 'CHA (1)', 'CONV (2)', and 'DEED (9)'. The 'CONV' and 'DEED' checkboxes are checked. A red arrow points to the 'CONV' checkbox, and another red arrow points to the 'DEED' checkbox. A red circle highlights the 'Hide Filters' icon (up arrow) in the top right corner of the panel.



The screenshot shows the 'Search Results' page with 32 entries. The 'Filters Applied' section shows 'CONV (3)' and 'DEED (16)' with a red arrow pointing to the 'DEED' filter. The 'Index Type' section shows a search bar and a list of filters: 'CHA (1)', 'CONV (3)', and 'DEED (16)'. A red arrow points to the 'DEED' filter. The search results table includes columns for #, View, Scan Pages, Date, Type, Party One, Party Two, and Description. The 'Scan Pages' and 'Date' columns are highlighted with red arrows.

How Do I View All the Names or Property on a Document?

If additional names or properties exist on a document an **Expand** icon (down arrow) will display. Click the icon to display all the entries. You can also click the **Expand All** icon at the top of the page to expand all documents listed.



The screenshot shows the 'Search Results' page for 'ALL: gilbert' with 32 entries. The 'Expand All' icon is highlighted with a red arrow. The search results table includes columns for #, View, Scan Pages, Date, Type, Party One, Party Two, and Description. The 'Party One' and 'Party Two' columns for the first entry show 'GILBERT, LYNDY' and 'GILBERT, SONNY' respectively, with a red arrow pointing to the 'GILBERT, LYNDY' entry. The 'Description' column for the first entry shows a detailed property record with a red arrow pointing to the 'Address' field.

How Do I View the Document and Images?

- Click the **View Document Details** icon in the View column to view the recorded information and images. Images are available on the document only if a plus sign appears inside the icon.

Search Results 1 to 1 of 1 For: ALL: hayes chase						
#	View	Scan Pages	Date	Type	Party One	Party Two
1	<input type="checkbox"/> 	21	05/04/2016	DEED	HAYES, C	

In Progress DEED

How Do I View Related Documents?

- To view related documents for a specific document, click the **View Related** icon in the View column. If the related document is linked, a **View Details** icon (magnifying glass) will display next to the related document. When selected, it will navigate directly to that document. If you wish to view all related documents for each document listed, click the **Expand All Related Docs** icon at the top of the page.

Search Results 1 to 1 of 1 For: ALL: hayes chase						
#	View	Scan Pages	Date	Type	Party One	Party Two
1	<input type="checkbox"/>  		11/05/2014	DEED	GILBERT, GILBERT,	

How Do I Sort by Column?

- Click the column title to sort in ascending or descending order. Only fields with arrows can be sorted.

#	<input type="checkbox"/> View	Scan Pages	 Date	 Type	 Party One	Party Two	Description	File#	 Book/Page
1	<input type="checkbox"/>								

How Do I Print the Results?

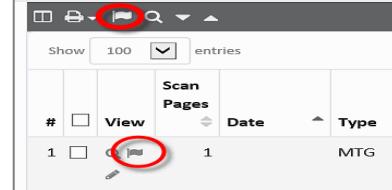
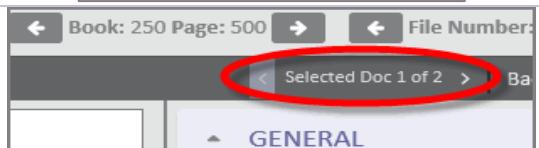
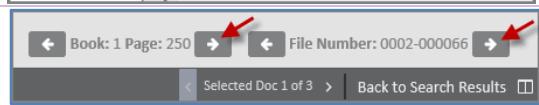
- To print specific rows of results, click the blank check box at the beginning of the row. Next, click the **Printer** icon on the task bar and then click **Print Selected Rows**.
- To print all documents on the results page, click the **Printer** icon on the task bar and then click **Print Current Page**. If multiple pages of results exist, navigate to those pages and print each page.

Search Results 1 to 2 of 2 For ALL: gilbert lynd						
#	View	Scan Pages	Date	Type	Party One	Party Two
1	<input type="checkbox"/> 	3	11/05/2014	LEAS	GILBERT, GILBERT,	ATTEST
2	<input checked="" type="checkbox"/> 	1	01/25/2016	MTG	GILBERT, GILBERT,	RELEASE 2

In Progress

Managing your Search Results

- There are two pages for search results; (1) the first page titled **Search Results** will show rows of documents that match what you searched, (2) the second page titled **Document Details** will display the document you chose to view from the Search Results page.

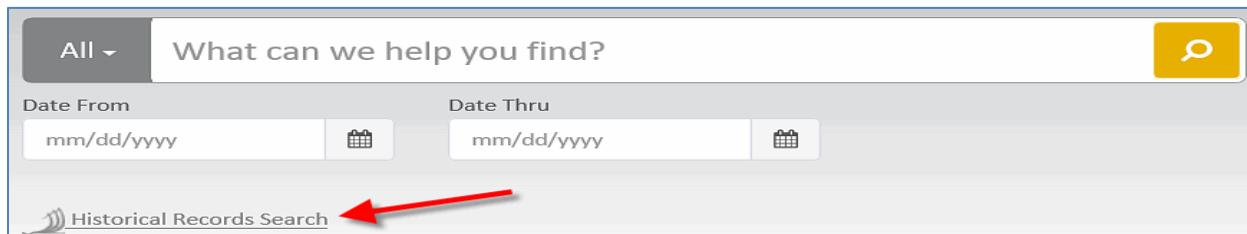
Action	Page Title	How to Perform the Action	Example																																										
Track what you have searched by highlighting the rows	Search Results	Click the Flag icon on the row to highlight it. To remove it, click the icon again or click the Clear Flag icon on the icon task bar at the top.																																											
Navigate to the Next Selected Document	Document Details	If you selected more than one document from the Search Results page, you can click the right arrow button to move to the next document.																																											
Navigate to the Next Sequential Document in the book	Document Details	Click the right arrow to go to the next book and page or file number. To see the previous sequential document in the book, click the left arrow button.																																											
Navigate the Special Entries List box in the Historical Records search	Special Entries	This list page is accessed when clicking the Special Entries link on the <i>Choose the Index Book</i> panel. When the Special Entries list displays, use the mouse scroll button within the list to see the entire list, or press the up/down arrows on the keyboard. You can also use the scroll bar on the page. At the bottom of the list page are Next/Previous and First/Last page buttons when more than one list page exists.	<p>Special Entries</p> <table border="1"> <thead> <tr> <th>View</th> <th>Specials ID</th> <th>Volume ID</th> <th>Division ID</th> <th>Specials</th> <th>Page</th> </tr> </thead> <tbody> <tr> <td>Q</td> <td>1</td> <td>66</td> <td>211</td> <td>ADMINISTRATORS</td> <td>19</td> </tr> <tr> <td>Q</td> <td>2</td> <td>66</td> <td>211</td> <td>AUDITORS</td> <td>29</td> </tr> <tr> <td>Q</td> <td>3</td> <td>67</td> <td>216</td> <td>BOARDS OF EDUCATION (SCHOOLS)</td> <td>63</td> </tr> <tr> <td>Q</td> <td>4</td> <td>68</td> <td>225</td> <td>CEMETERIES</td> <td>49</td> </tr> <tr> <td>Q</td> <td>5</td> <td>68</td> <td>225</td> <td>CHURCHES OR RELIGIOUS ORGANIZATIONS</td> <td>51</td> </tr> <tr> <td>Q</td> <td>14</td> <td>77</td> <td>302</td> <td>TRUSTEES IN GENERAL</td> <td>39</td> </tr> </tbody> </table> <p>Showing 1 to 14 of 14 entries</p> <p>First Previous 1 Next Last</p> <p>Cancel</p>	View	Specials ID	Volume ID	Division ID	Specials	Page	Q	1	66	211	ADMINISTRATORS	19	Q	2	66	211	AUDITORS	29	Q	3	67	216	BOARDS OF EDUCATION (SCHOOLS)	63	Q	4	68	225	CEMETERIES	49	Q	5	68	225	CHURCHES OR RELIGIOUS ORGANIZATIONS	51	Q	14	77	302	TRUSTEES IN GENERAL	39
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Search Tips

What are you trying to Search for?	How to search for this value	Example
Amounts	Type the amount with or without the dollar symbol if you are searching for it in an amount field. In order to retrieve amounts from other fields such as a description, you must type the dollar amount exactly as it was recorded which means you must include or exclude the dollar symbol.	100.50 or \$100.50
Lot Number	Can search with spaces or a dash.	12-A or 12 A
Index Type	The index type can be added to the value you are searching and can be spelled out or abbreviated.	John Smith Mtg or John Smith Mortgage
File Number	You must enter the entire year portion of the file number. However, you are not required to enter leading zeroes in the sequence number.	2015-000123 can be entered as 2015-123
Clear the search information	Depending on the browser in use, you may have an X at the end of the search box to clear what you have typed.	
Wild Card Search	<p>The wild card search is valuable when you're unsure how to spell a word or name. This performs a 'Begins With' type of search. When searching 1 word, you must enter at least the first 2 characters followed by the wild card (asterisk). If you are searching multiple words, only 1 character is required for a word and a space must follow the asterisk between the words. The wild card must always appear at the end of the word you are searching and not in the beginning or middle of the word.</p> <p>In this example, Johnathan Smyth could be spelled multiple ways. You could use the wild card in various ways to locate this name.</p>	<i>Jo*</i> <i>Jo* Smyth</i> <i>J* Smyth</i> <i>J* S*</i> <i>John* SM*</i>

How Do I Access Historical Records (OIB) if Available?

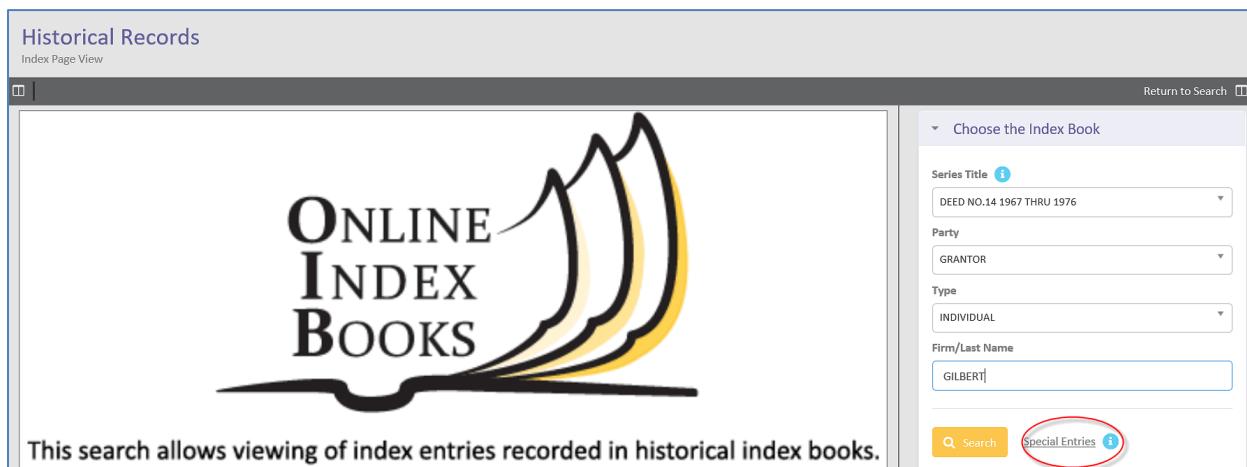
- If a site has historical records a **Historical Records Search** link will appear on the search home page. Click this link to navigate to the scanned manual index books.



How Do I search for a Historical Records Index Page?

Finding the image page is the first step to locating the record book page where the document image is located.

- Enter and select search criteria from the panel on the right side of the page called **Choose the Index Book**. The fields may vary based upon a sites specific data.
 - If available, select the index book.
 - Select the series from the drop down list (typically reflects a date range).
 - In the party side box select the party side 1 (grantor, mortgagor) or party side 2 (grantee, mortgagee).
 - In the party type box, select from Individual or Corporation/Firm Name.
 - Type the firm name or last name and click the **Search** button or press **Enter**. In lieu of a name (if available), you can also click the **Special Entries** link and then click the **View** icon to navigate to an index page.



Special Entries					
View	Specials ID	Volume ID	Division ID	Specials	Page
Q	1	66	211	ADMINISTRATORS	19
Q	2	66	211	AUDITORS	29
Q	3	67	216	BOARDS OF EDUCATION (SCHOOLS)	63
Q	4	68	225	CEMETERIES	49
Q	5	68	225	CHURCHES OR RELIGIOUS ORGANIZATIONS	51
Q	14	77	302	TRUSTEES IN GENERAL	39

Showing 1 to 14 of 14 entries

First | Previous | **1** | Next | Last

Cancel

How Do I Search for a Historical Record Book?

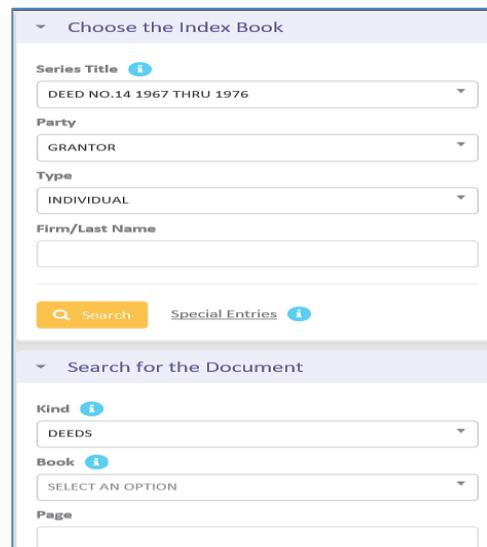
- In the *Search for the Document* panel on the right, select the type of instrument in the Kind box, select the book from the Book list box, and then enter the Page number. Press **Enter** or click the **Search** button.

Note: If you cannot see all 3 search selection fields, you may need to collapse the *Choose the Index Book* box by clicking the down arrow in the box.



Will I have access to Historical Records Index Pages and Record Book Images?

- It is very common for some sites to have only the Index Pages available. If the record book is also available, a second container called *Search for the Document* will display for searching.



What Icon Functions are Available on the Historical Record Search Task Bar?

- Below are explanations for the icons located on the task bar that displays when an image is viewed.

Icon	Description
	Show/Hide Thumbnails – This displays smaller thumbnail image pages on the left of the large image viewing area. To hide the thumbnails, click this icon.
	First Page/Previous Page – Navigates to the first page or previous page of the document.
Page 1 of 10	Page Navigation – Displays the page number of the active image and the last page number of the document. This is not a page count but the actual page range as duplicate page numbers may exist.
	Next Page/Last Page- Navigates to the next page or the first occurrence of the last page number if the last page number exists twice for example.
	Previous/Next Index Group – Left arrow navigates to the previous index group while the right arrow navigates to the next index group. For example, one group could be AA thru AG and the next group would be AH thru AZ. This is not available when viewing a record book image.
Index Page <input data-bbox="204 544 236 576" type="text"/>	Index Page - This will navigate to a specific page number. Press enter after typing the page number. This is not available when viewing a record book image.
	Print Options – Choose from Print Selected (prints only the image pages you've selected from the thumbnail pane on the left) or the Print Visible Area (prints only the area of the image you can see).
	Rotate Functions – Rotates the image 360 degrees or to the right or left 90 degrees.
	Invert – Changes text from black text on white background to white text on black background.
	Fit to Width, Fit to Height, Actual Size – Fits the image to the width, height, or to actual size of the viewing area.
	Zoom In and Zoom Out – Enlarges or minimizes the image.
	Zoom Area – Enlarges the area on the image that has been selected by the mouse.
	View Index Directory – Displays the index directory page. This is not available when viewing the index page.
	Return to Index – This will return to the last index page viewed. This is not available when viewing the index page.
	Return to Search – This will return to the search home page. This is not available when viewing the index page.
	Expand/Restore View – This icon toggles between Expand View and Restore View. It allows hiding the header and task bar to allow more viewing area.