Chapter 5

Retrieving Documents

Each time a document is added to ApplicationXtender Web Access, index information is added to identify the document. This index information is used for document retrieval. ApplicationXtender Web Access provides a variety of robust search and retrieval methods to allow you to perform queries to retrieve a specific set of documents. These search methods include Search by Index, Search by Wildcard, Search by List of Values, Expression Search, Full-Text Search, and Combination Search. In addition to these options, you can search document properties (ODMA attributes). You can even combine search options to retrieve only the documents most relevant to your needs.

If the application is configured for Centera retention or AppXtender software retention, and you have the appropriate privileges, you can also search for documents that are under retention or retention hold.

AppXtender Web Access deployments support full-text indexing. The AppXtender Index Server, an add-on module for ApplicationXtender, allows you to submit AppXtender Web Access documents to be full-text indexed and to run searches based on full-text data. AppXtender Web Access offers a wide range of options for performing full-text (or keyword) searches on indexed document pages. Text-based documents can be submitted directly to the Index Server for indexing. Image documents can be submitted to the Index Server, which processes the document using optical character recognition (OCR) and then indexes the resulting text.

ApplicationXtender Web Access can also search by document property content (ODMA attributes). Search parameters include, but are not limited to, author, document name, company, date, subject, comments, and keywords. For more information about searching document property content, refer to Searching Document Properties, page 173.

Once you retrieve a document, AppXtender Web Access provides a variety of other functions that you can use to work with the document, including document display, printing, annotations, page/document addition/deletion, index modification, and document property modification.

If you have the Report View privilege in the AppXtender Application Generator, in addition to searching applications for documents, you can also use AppXtender Web Access to query applications for AppXtender Reports Mgmt reports. AppXtender Reports Mgmt report retrieval provides the same index querying functions as retrieving AppXtender Web Access documents, and you can view and print AppXtender Reports Mgmt reports. You can find more information on the Report View function in Displaying ApplicationXtender Reports Management Reports, page 239.

This section explains how to access and use all of the search methods available in AppXtender Web Access. Refer to the following topics for more information:

- Using Queries in ApplicationXtender Web Access, page 146
- Searching a Single Application, page 149

# Using Queries in ApplicationXtender Web Access

A query is a document search. It allows you to retrieve stored documents from AppXtender Web Access applications based on information that you specify as search criteria. With ApplicationXtender Web Access, you can search either one application or across multiple applications simultaneously (provided all the applications reside within the same data source).
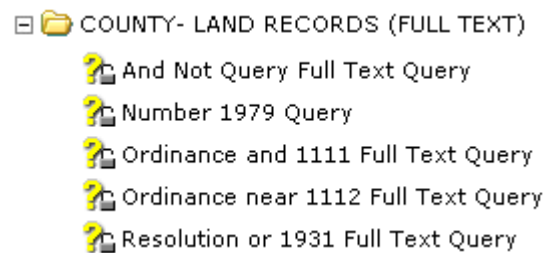
Using Query functionality, you can create a new query, edit an existing query, and run a query. You select to create a new query from the shortcut menu for the application you want to query.

Figure 92. View Menu New Query Selection
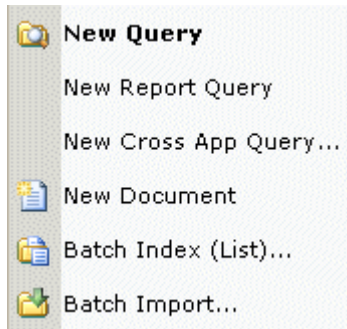
Saved queries are listed under the application to which they pertain.

Figure 93. Saved Queries on Applications Window

You create and edit the actual query in Query view. Search criteria entries can be made in the following sections:

- Use the Index Name section to perform queries based on document index field information. Each index field is listed on a separate line. For more information, refer to Creating a New Query, page 150.

Figure 94. Application Query View Index Name Section

If ODMA attribute (document properties) searching is enabled on the Search/Result Set page on the Settings dialog box, document properties also appear in this section. For more information, refer to Searching Document Properties, page 173.

- Use the Full-Text Query Criteria section to perform full-text queries. Full-text queries are queries based on the text within the documents. If you are using the K2 full-text engine, you can perform queries based on a thesaurus as well as the document text. For more information, refer to Searching Using Full-Text Query, page 157.

Figure 95. Search Criteria Page Full-Text Query Criteria

Note: You can perform queries using *both* the index and full-text search values. For more information, refer to Searching Using a Combination Search, page 162.

- If the application is configured for Centera retention or AppXtender software retention, and you have the Retention User privilege, the Query Options section of the search criteria page displays retention options.

For information on performing queries that search across multiple applications, refer to Searching Multiple Applications, page 162.

A Current Query drop-down appears at the top right in Application Query view. If you queried the selected application previously, to use the same search criteria for the current query, select Last Query. To run a report query on the application, select Report Query.

Figure 96. Current Query Drop-Down

Searching a Single Application

You can create a new query to search for documents and their previous revisions or for AppXtender Reports Mgmt reports within a single application. AppXtender Web Access provides flexible options for document searching by index value. In addition to entering exact index information as search criteria, you can enter lists of values, expressions (ranges), and wildcards. When queries are executed, if two or more records meet the search criteria you entered, Query Results view appears, listing those document index records.

Note: If only one document satisfies the search criteria, the document opens automatically in Document Display view.

Index field criteria is entered in the index field search criteria section on the search criteria page. The following table describes the purpose of each column.

Table 26. Index Field Search Criteria Columns

Option	Description
Show	Use to select which index fields you want displayed on the Application Query view. Select the check box corresponding to each of the desired fields.

Option	Description
Index Name	Lists all searchable index fields for the current application.
Search Value	Use to enter known index data for searching the current application for documents. When creating a Range or List of Values query, select the range or list of values buttons to create the search syntax in the proper format.

Creating Queries to Search a Single Application

AppXtender Web Access allows you to use several different methods to set search criteria for searching a single application. Refer to the following topics for more information about creating queries with specific search criteria:

For information about saving, editing, renaming, or setting viewing rights to queries, refer to .

Creating a New Query

You can create queries to search a single application for documents that match specific search criteria.

To create a new query using index field values:

1. To access Application Query view, right-click the name of the application you want to query and select New Query from the shortcut menu.

   The search criteria page appears.

Figure 97. Application Query View (New Query)

Note: To return to Application view, click the Application List button on the toolbar, or click Applications on the View menu.

2. If there are any index fields you *do not* want shown in the search results, in the Show column, click the check boxes for those fields to clear the check marks.

3. Enter the search criteria in the Search Value text boxes to the right of the selected index names.

    Note: For more information on entering search criteria, refer to Using Advanced Index Value Search Criteria, page 152.

4. To filter query results for documents that have been filed for retention, select one of the following options from the Show list box in the Query Options section of the tab:

    •   All documents excluding documents on retention

    •   Only documents on retention

    •   Only documents on retention hold

    •   Only documents on retention not on retention hold

    Note: Retention options do not appear in the list box if the application is not configured for retention.

5.   After entering search criteria and/or retention query options, perform one of the following actions:

   - Click Submit to execute the query without saving it for future use.

   - Enter a name for the query in the Query Name text box. To share the query with other users, select Available To All Users. Then, click Save to save and execute the query.

      Note: Saved queries are accessible directly from the AppXtender Web Access window.

   - Click Reset to clear the values from the Search Value text boxes. Then enter new search criteria.

What happens when a query is successfully completed varies depending on the number of documents found that match the search criteria.

- If the search returns only one result, Document Display view appears on your desktop and the document automatically opens in the viewer.

- If there are two or more results, Query Results view appears on your desktop. This view lists all of the documents in the query result set. For information about displaying documents from Query Results view, refer to Displaying Documents from Query Results View, page 180.

Figure 98. Query Results View

Note: If no documents meet the specified search criteria, a No Documents Found message appears. Click OK to clear the message and continue.

Using Advanced Index Value Search Criteria

In addition to entering specific index values for a basic index name search, there are several advanced index value searches. Using an advanced index value search method, you can search for a wider range of documents.

Four advanced index value search methods are discussed in the following topics:

- Searching Using Wildcards, page 153

- Searching Using the List of Values Feature, page 154

- Searching Using the Expression Search Feature, page 155

- Searching Using Expression Operators, page 160

Searching Using Wildcards

You can use an asterisk (*) as a wildcard in your search criteria. Using the wildcard character can narrow a search by controlling the number of documents returned in the search results.

Wildcards are valid for index fields with the data types Text, Time Stamp, SSN, Telephone, Zip Code, Boolean Choice, and User-defined List. For all other data types, use search expressions, such as a range or a list of values.

The asterisk wildcard matches any single character or string of characters. It is used for beginning with, ending with, and pattern searches. The following table shows how wildcards affect which documents are included in search results.

Table 27. Wildcard Search Specifications

Search Criteria	Result
SMITH	Returns all documents with a Name of "SMITH."
SM*	Returns all documents with a Name that begins with the characters "SM."
*ITH	Returns all documents with a Name that ends with the characters "ITH."
S*H	Returns all documents with a Name that begins with the character "S" and ends with the character "H."
ITH	Returns all documents with a Name that contains the character pattern "ITH."

Note: Always use the wildcard character with other search criteria. Entering only a wildcard in a search field results in a search of the entire database, which negatively impacts system performance on multi-user network systems.

To search for documents using the wildcard character:

1. On the search criteria page, enter index data in the Search Value text box for at least one field.

    Figure 99. Sample Wildcard Search Criteria

Show	Index Name	Search Value	
☑	TEXT	*	
☑	BOOLEAN	*	

2. Click Submit to begin the search process. ApplicationXtender Web Access searches the active application for all records that match the specified criteria. If a single document satisfies the search criteria, the document opens automatically in Document Display view. If two or more matching documents are found, a list of those documents appears in Query Results view. For more information, refer to Displaying Documents from Query Results View, page 180.

Searching Using the List of Values Feature

A list of values search allows you to define multiple criteria for every search field. For an index named SSN, for example, you could enter 123-45-6789, 111-11-1111, and other Social Security numbers in the Search Value text box to search for multiple values.

ApplicationXtender Web Access locates all documents that contain any entry in the Search Value text box. All documents with 123-45-6789 in the SSN field *and* all documents with 111-11-1111 (as well as any others you add) are located and, if more than one document is found, listed in Query Results view. By allowing you to specify more alternatives, the list of values operation allows inclusive searches that retrieve a larger set of documents.

Note: If only one document satisfies the search criteria, the document automatically opens in Document Display view.

To search for documents using a list of values search:

1. Click the Search List button at the right of the Search Value text box you are using to specify search criteria.

    Figure 100. List of Values Button for List of Values Search

    The Search List editor appears.

    Figure 101. Search List Editor

2. In the Field Value text box, enter a value for the list.

3. To add the value to the list, click Add.

Figure 102. Value Added to List

4. Repeat steps 2 and 3 for each value you want to include.

5. If necessary, edit the values selected for the list.

   - To replace a value with a new one, select the value to be replaced from the list box, enter a new value in the Field Value text box, and click Replace.

   - To delete a value, select the value to be deleted from the list box, and click Delete.

   - To delete all values in the list, click Delete All.

6. Click Ok. The list of values editor closes, and the specified criteria appears in the appropriate text box on the search criteria page.

Figure 103. List Values Added to Search Criteria Page

Show	Index Name	Search Value	
☑	MEMBER NUMBER	List: '45738' , '78635' , '25834'	
☑	MEMBER NAME		

7. Enter any other index values you want included in the query.

8. Click Submit to start the search. When the search successfully completes, if only one document satisfies the search criteria, that document opens automatically in Document Display view. If two or more documents satisfy the search criteria, Query Results view appears with a list of those document.

   Note: For information on accessing documents from Query Results view, refer to Displaying Documents from Query Results View, page 180.

Searching Using the Expression Search Feature

Another way to search for a range of documents is to enter the index field search criteria as an expression. This gives you more options for narrowing a search within an index field. To help compose your search expression syntax, ApplicationXtender Web Access features an expression

editor. To access the editor, click the Search Range button to the right of the index field search criteria text box.

Figure 104. Search Range Button for Index Field Expression Search

For index field expression searches, use symbols representing expressions as part of the search criteria. These symbols include Between [], Greater Than>, Greater Than Or Equal To>=, Less Than <, Less Than Or Equal To <=, and Not Equal To <>. The following table shows the correct syntax for each expression.

Table 28. Expression Syntax

Expression	Symbol	Correct Syntax Example
Between	[,]	['1','2']
Greater than	>	>2222.00
Greater than or equal to	>=	>=2222.00
Less than	<	<2222.00
Less than or equal to	<=	<=2222.00
Not Equal to	<>	<>2222.00

To search for documents using an index field expression search:

1. Click the Search Range button corresponding to the Search Value text box you are using to specify search criteria.

   The expression editor appears.

   Figure 105. Expression Editor

2. From the Type of Comparison list box, choose the type of comparison you want to use.

3. Enter a value in the Value text box.

   Note: If you selected Between [ ] as the type of comparison, enter a value in the And text box.

4. Click OK. The expression editor closes, and the search criteria page appears with the selected expression syntax in the Search Value text box.

Figure 106. Expression Syntax in Search Value Text Box

Show	Index Name	Search Value	
☑	MEMBER NUMBER	Expression: ['00000','49999']	
☑	MEMBER NAME		

Note: You must use the *exact* format when entering expression syntax. An error message displays when the expression syntax is incorrect. Click OK to clear the message and continue.

Figure 107. Format not valid Message

5. Click Submit to start the search. When the search successfully completes, if only one document satisfies the search criteria, that document opens automatically in Document Display view. If two or more documents satisfy the search criteria, Query Results view appears with a list of those documents.

    Note: For information on accessing documents from Query Results view, refer to Displaying Documents from Query Results View, page 180.

Searching Using Full-Text Query

ApplicationXtender Web Access supports full-text (keyword) searches of documents in the full-text database. The full-text search option searches the text of all of the documents in the full-text database. You can submit documents from AppXtender Web Access to the AppXtender Index Server for full-text conversion. The documents are then submitted to the full-text database.

The AppXtender Index Server uses either the ProIndex full-text engine or the K2 full-text engine to submit documents to the full-text database. For more information on the AppXtender Index Server, refer to the *ApplicationXtender Index Server Administrator's Guide.* For details on querying using the K2 or ProIndex full-text engine, refer to the manufacturer's documentation.

Only documents that have been submitted to the AppXtender Index Server can be retrieved in a full-text search. If documents have not been submitted to the server, full-text search features are not available. If you have a full-text license, a search criteria page with a Full-Text Query Criteria section appears regardless of whether you have full-text data.

Figure 108. Full-Text Query Criteria Section

Note: The full-text search feature is enabled by default in AppXtender Web.NET by selecting Request Full Text Search Support on the Login page when logging on to the data source.

There are four types of full-text searches: All Words, Any Words, Exact Phrase, and Expression.

Figure 109. Full-Text Search Type Options

The following table describes the four full-text search options.

Table 29. Full-Text Search Types

Option	Description
All Words	Searches for documents containing ALL words entered in the Criteria text box.
Any Words	Searches for documents containing ANY words entered in the Criteria text box.

Option	Description
Exact Phrase	Search for documents containing the exact phrase entered in the Criteria text box.
Expression	Searches for documents containing the Expression entered in the Criteria text box.

If the AppXtender Index Server is configured to use the K2 full-text engine, a Thesaurus check box appears in the Query Options section of the search criteria page. Selecting the Thesaurus feature allows you to search for words that are related to your search criteria. It contains a list of synonyms or keys for possible words to be used in a search.

Figure 110. Thesaurus Check Box

The thesaurus control file (*.ctl) is installed when K2 servers are installed. When the Thesaurus check box is selected and a full-text search is performed, AppXtender Web Access searches the thesaurus control file for synonyms or keys for words in the search criteria. For more information on the thesaurus control file and its configuration, refer to the *K2 Collection Reference Guide*.

Another query option is the Include previous document revisions check box. When this check box is selected, the search returns both current and previous versions of documents that meet the search criteria.

Note: When the Show Previous Document Version option on the Search/Result Set page of the Settings dialog box is checked, the Include previous document revisions check box in the Full-Text Query Criteria section of the search criteria page is automatically selected. Clearing the check box on the search criteria page does *not* affect the setting of the Show Previous Document Version check box on the Search/Result Set page. For more information, refer to "Search/Result Set Tab" in Chapter 2, Customizing Your Workstation.

To search for documents using the Full-Text Query Criteria option:

1. Select one of the Search Type options for the query.

2. Enter the search criteria in the Criteria text box. To search a specific language, type the search criteria in the following format:

   `<LANG/language ID>search value`
   where *language ID* is the two-letter language code and *search value* is the full-text-search value; for example, <LANG/ZH>software.

   Note: Only the K2 full-text engine supports full-text searches in languages other than English. The engine uses the default user language if the search string does not specify a language.

3. To use the thesaurus to search for synonyms for the search criteria, click to select the Thesaurus check box.

   Note: The Thesaurus check box is available only when the K2 full-text engine is used to submit documents to the full-text database. For more information, refer to the *ApplicationXtender Administrator's Guide*.

4. To search previous revisions of documents, select the Include previous document revisions.

5. To save the query so that you can use it again, type a name in the Query Name text box.

   Note: Check the Available To All Users check box to allow others to use the saved query.

6. Click Submit. When the search successfully completes and Query Results view appears, the FTS View dialog box opens. For more information Query Results view, refer to "Search/Result Set Tab" in Chapter 2, Customizing Your Workstation.

Searching Using Expression Operators

The expression operators search option uses expression operators to focus the document search. You build the query by combining the words or text strings that you want to search for with expression operators such as *and* and *or*. You can also combine operators for more complex searches.

Note: By default, AppXtender Web Access interprets search expressions from left to right, interpreting each search operator one at a time, and narrowing the results with each subsequent search.

The following table describes each of the expression operators that can be used in ApplicationXtender Web Access queries.

Table 30. Expression Operators

Operator	Description
and	When you use the *and* operator between two words, AppXtender Web Access searches for documents that contain both words.
or	When you use the *or* operator between two words, AppXtender Web Access searches for documents that contain at least one of the words.
and not	When you use the *and not* operator between two words, AppXtender Web Access searches for documents that contain the first word but not the second.
near( )	When you use the **near ( )** operator after two words, AppXtender Web Access searches for documents in which both words occur in any order within a range that you specify between the parentheses.
Character wildcard	When you use a **question mark (?)** in a text string, AppXtender Web Access searches for documents that contain the string of text but allows any single character to take the place of the question mark in the text string.
String wildcard	When you use an **asterisk (*)** in a text string, AppXtender Web Access searches for documents that contain the specified string of text but allows any number of characters or even the lack of a character to take the place of the asterisk in the text string.

Operator	Description
Parentheses	You can use parentheses to group search expressions to control the order in which AppXtender Web Access performs the searches. When you use parentheses in an expression, AppXtender Web Access searches first for documents that contain the expression in parentheses.
Backslash	By default, when you use symbols such as question marks (?), asterisks (*), and parentheses ( ), AppXtender Web Access interprets them as operators. If you want to search for these and many other symbols as characters in a text string, you must precede each symbol with a backslash (\).

The following table provides an example for each of the expression operators. As you review the examples, remember that AppXtender Web Access interprets search expressions from left to right.

Table 31. Examples of Expression Operators

Operator	Example	Finds Documents With
and	Mason and Simon	Both Mason and Simon
or	Mason or Simon	Either Mason or Simon
and not	Mason and not Simon	Mason but not Simon
near ( )	Mason near (20) Simon	Both Mason and Simon, within a range of 20 words of each other
?	L?O	A string of 3 consecutive characters, in which the first must be L, the second one can be any character, and the last must be O.
*	S*	Any string that begins with S
( )	Mason and (Simon or Schiff)	Either Simon or Schiff first. Of those documents, AppXtender Web Access retrieves documents that also contain Mason
\	\(Mason\?\)	(Mason?)

In some cases, the words or text strings you want to search for will already include characters used as expression operators, such as a question mark or an ampersand. When expression operator characters are used literally in a query, the character must be preceded by a backslash. The following table lists each of the characters to which this rule applies.

Table 32. Characters That Must Be Preceded by a Backslash

Character Name	Symbol	Character Name	Symbol
Parentheses	( )	Caret	^
Brackets	[ ]	Tilde	~
Angle brackets	<>	Number sign	#
Double quotes	"	Colon	:
Asterisk	*	Backslash	\

Character Name	Symbol	Character Name	Symbol
Question mark	?	Blank space	
Pipe	|	Null	
Ampersand	&		

Searching Using a Combination Search

You can combine Search by Index and Full-Text Search criteria when creating queries. This is referred to as a combination search. You build a combination search by entering criteria in the Search by Index and Full-Text Search text boxes. Then select the AND option or the OR option.

When you use the AND operator, AppXtender Web Access searches for documents that contain both sets of criteria. When you use the OR operator, AppXtender Web Access searches for documents that contain at least one set of criteria. For more information, refer to Searching Using Expression Operators, page 160.

AppXtender Web Access interprets the search expression from left to right.

To search for documents using a combination search:

1. Enter criteria in the Index Name criteria section.

2. Enter criteria in the Full-Text Query Criteria section.

3. If appropriate, select the Thesaurus check box, the Include previous document revisions check box, or both.

4. To save the query so that you can use it again, type a name in the Query Name text box.

   Note: Select the Available To All Users check box to allow others to use the saved query.

5. Click Submit. When the search successfully completes and Query Results view appears, the FTS View page opens. For more information about Query Results view, refer to Navigating Through Pages in Query Results View, page 183.

Searching Multiple Applications

In AppXtender Web Access, regular queries are limited to a single application. To create and run queries that search multiple AppXtender Web Access applications for selected index information, full-text information, or both, you use the cross-application query feature. For example, using a cross-application query, you could search three different applications for information on the Social Security number 111-22-3333. Or, you could search for all documents containing the text "most recent software releases."

To create and configure a cross-application query, you must have Java™ Runtime Environment installed on your computer. In addition, cross-application queries must be configured to search only applications within the same data source.

For more information about cross-application queries, refer to the following topics:

Note: AppXtender Web Access does not support querying for AppXtender Reports Mgmt-generated reports across multiple applications.
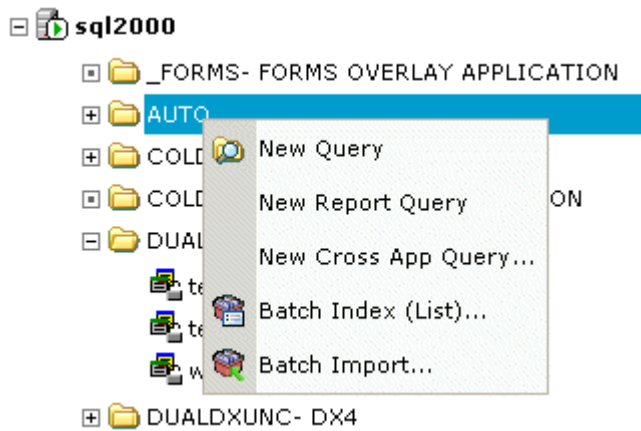
Installing Java Runtime Environment

The cross-application query wizard in AppXtender Web Access is implemented using a Java applet. To run the wizard, the Java™ Runtime Environment (JRE) must be installed on your computer. Refer to the *ApplicationXtender Web Access Release Notes* for the supported version of JRE.
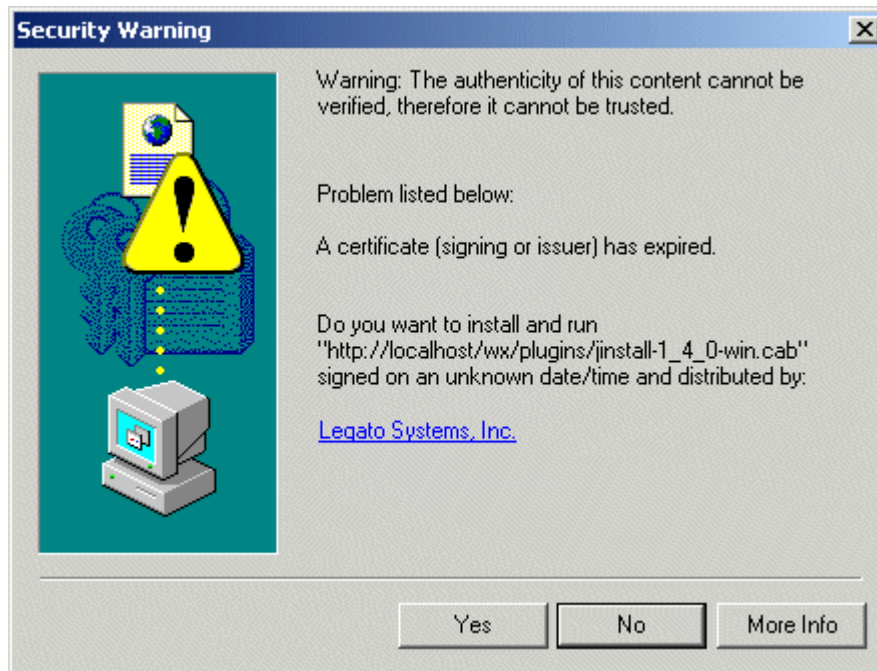
To install the Java Runtime Environment:

1. Right-click the application that you want to create a cross-application query for, then select New Cross App Query.

   Figure 111. Selecting New Cross Application Query


   A Security Warning appears.

Figure 112. Java Runtime Security Warning

2. To accept all security certificates from EMC in the future, click Yes.

   The Cross App Query pop-up window appears. Then the InstallShield Wizard for Java 2 Runtime Environment dialog box appears.

   Note: If the Cross App Query pop-up window loads and you are not prompted to install the Java Plug-in, the Java Runtime Environment is already installed on your computer. Proceed to Configuring a Cross-Application Query, page 166.

Figure 113. InstallShield Wizard for Java 2 Runtime Environment Dialog Box
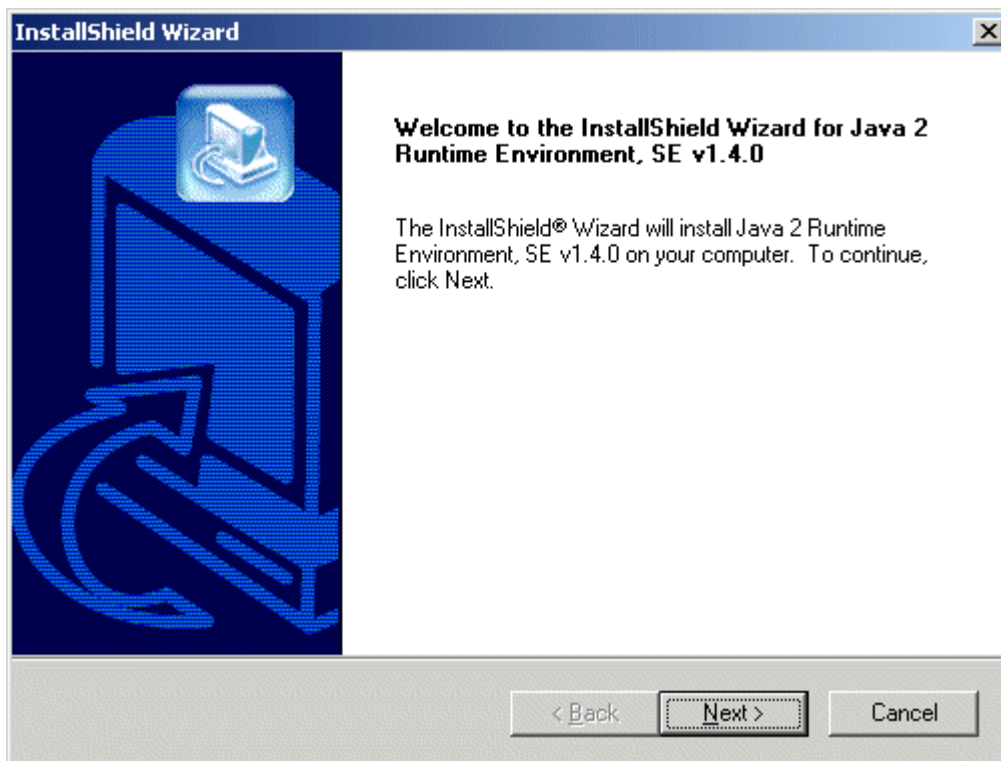
3. Click Next.

4. Select the appropriate Locale and Region from the corresponding dialog boxes, and then click Install. The installation components for the Java Runtime Environment download. When the download is complete, the License Agreement page appears.

5. Read the agreement. If you agree, click Yes to continue. The Choose Destination Location page appears.

Figure 114. Choose Destination Location Page
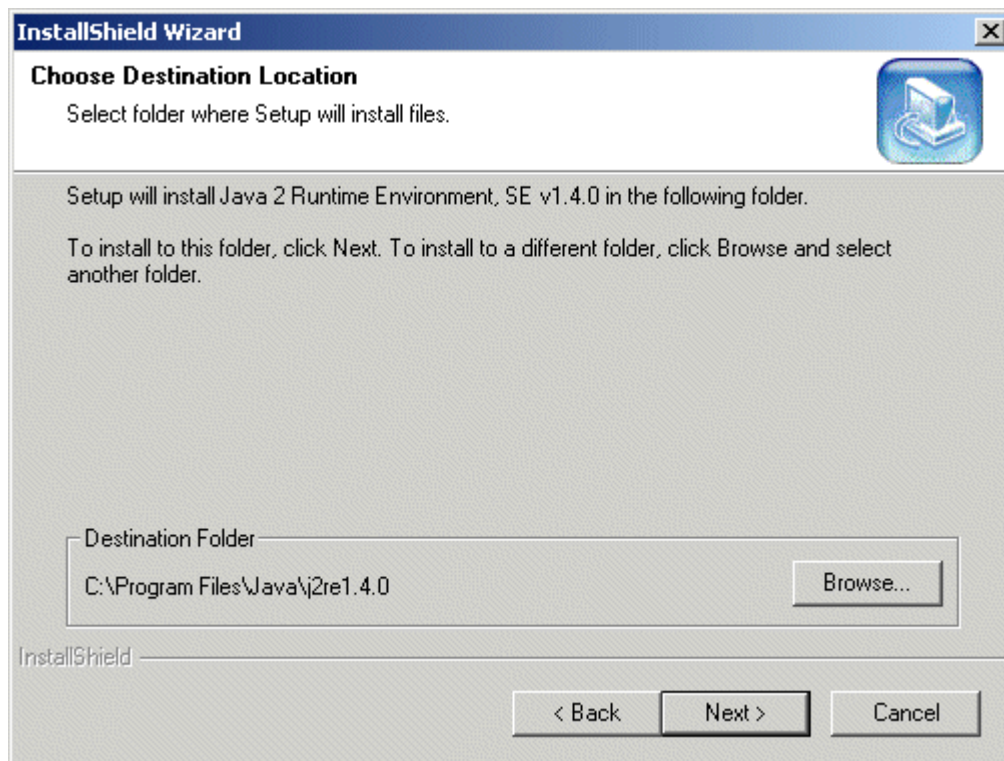
6. Verify that the specified destination folder is the location where the Java 2 Runtime Environment program files should be installed. If the listed folder is incorrect, click Browse and select the correct destination.

7. Click Next. Java 2 Runtime Environment Setup begins installing the program.

8. Select the browser for which you want to make Java Runtime Environment the default if the wizard displays the Select Browsers screen.

9. Click Next to continue. The Java 2 Runtime Environment installation continues. When it finishes, the cross-application query pop-up window begins loading the cross-application query Java applet.

Configuring a Cross-Application Query

When creating a new cross-application query, you can configure the query using the new cross-application query feature. Using the Cross-Application Query Configuration dialog box, you set query parameters, including which applications are to be included in the query and which fields within the applications are to be used. You also define the fields used as search fields for querying and the fields you want to appear in Query Results view.

Note: When configuring a query, for maximum effectiveness, select index fields that are common across all of the selected applications.

You perform two basic steps when configuring a new cross-application query:

- Select the applications to include in the query

- Select the application fields to include in the query

The following procedure describes these steps in more detail.

To configure a cross-application query:

1. Right-click the application for which you want to create a cross-application query, and click New Cross App Query on the shortcut menu. The Cross Application Query Configuration dialog box appears.

   **Figure 115. Cross Application Query Configuration Dialog Box**
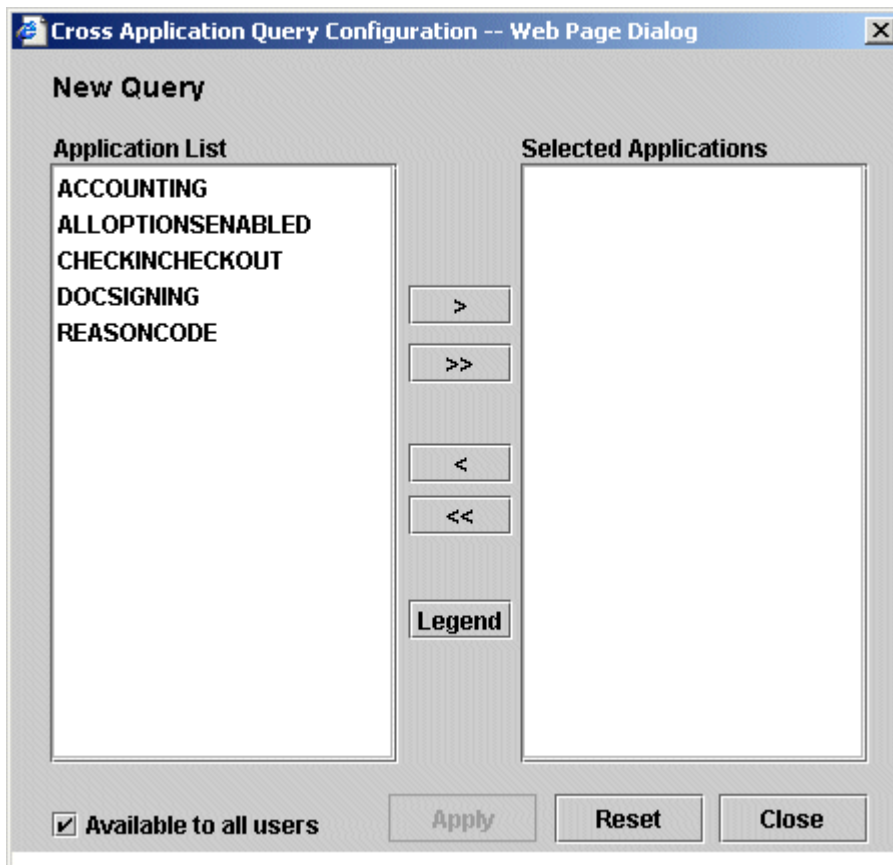
   Note: If the Java 2 Runtime Environment is not installed, a security warning appears instead of the Cross Application Query Configuration dialog box. Follow the instructions provided in Installing Java Runtime Environment, page 163 before proceeding with your query.

2. From the Application List text box, click one of the applications that you want to include in the query.

3. Click **>**. The selected application and its index fields are added to the Selected Applications text box.

   Note: To use all of the applications in the Application List list, click **>>**.

4. Repeat steps 2 and 3 for each additional application you want to include in the query.

Figure 116. New Cross Application Query Applications Selected
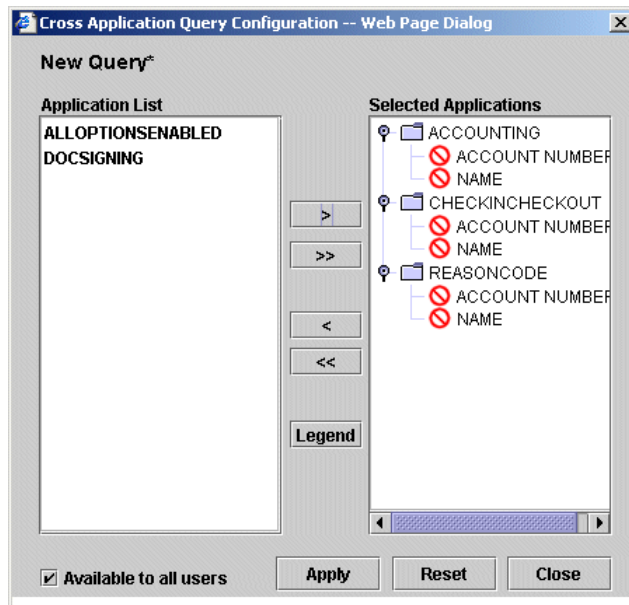
Note the icons to the left of the field names in the Selected Applications list. These icons indicate the cross-application query status for each field. There are three types of icons. To access information about the icon types from the dialog box, click the Legend button.

The following table describes what each type of icon represents.

Table 33. Cross-Application Query Icons

Icon	Meaning
⃠	Field will not be used in the query and will not appear in Query Results view. (This is the default setting for application fields in a cross-application query.)
?	Field will be used as search criteria.
✓	Field will not be used as search criteria but will display in Query Results view.

5. To remove one or more applications from the Selected Applications list, perform one of the following steps:

• To remove a single application, select the application and click <.

• To remove all applications from the list, click <<.

6. Configure the index fields for the cross-application query. You have the following choices for each field:

• To make a field searchable, click the icon until a question mark appears. At a minimum, at least one search criteria index field must be common to at least two of the included applications. To ensure relevancy of returned documents, however, *all* search criteria index fields should be common to *all* included applications.

   Note: When using a date field as a cross-application query search field, the date format must exactly match for you to find the date and view it.

Each application must share a searchable field with at least one other application included in the query. For example, if you are searching three applications, the first and second application could have one field in common, and the second and third application could have another field in common.

— If a selected application has no fields in common with the other applications, you will receive the following error message: "Application X does not share any searchable fields with other applications." You will not be able to use the query in its current state.

— To include a field in Query Results view, click the icon until a check mark appears.

Note: If an index field that is configured to display in Query Results view is not common to all applications, the field will appear in Query Results view but will not show any information for documents from those applications not containing that index field.

— To exclude a field from both the search criteria page and Query Results view, click the icon until the red "not allowed" icon appears.

**Figure 117. Query Fields Designated**
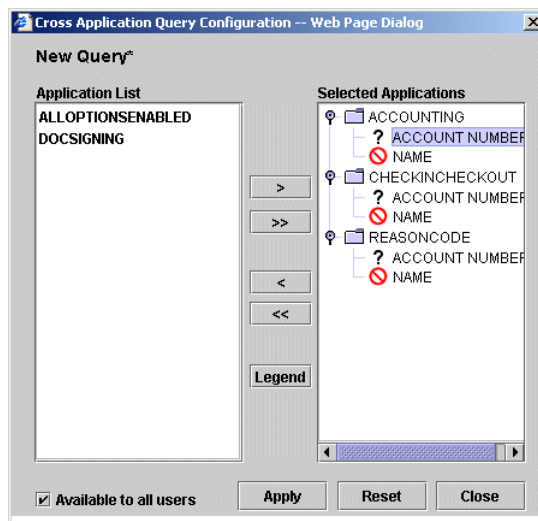
![Caution icon] **Caution:** Most cross-application query search field formats should match exactly across applications. Phone number fields are the exception. And while formatting can differ between phone number fields, the total number of digits must match. For example, a phone number field with the (nnn)nnn-nnnn format can be used with a phone number field using the nnn-nnn-nnnn format because both have a total of 10 digits. But a nnn-nnnn phone number format could not be used in the same query because it has only 7digits.

7. To restrict access to the cross-application query, clear the Available to all users check box. Leaving the check mark in the check box makes the query accessible to all users.

8. When you finish configuring the fields, click Apply to save the query. The Cross Application Query Save As dialog box appears.

9. Type a name for the cross-application query in the Enter the name of the query text box and then click Save. The Cross Application Query save as dialog box closes, and the Cross Application Query Configuration dialog box appears.

10. Click Apply to save the query. A confirmation message appears.

Figure 118. Cross Application Query Successful Save Message
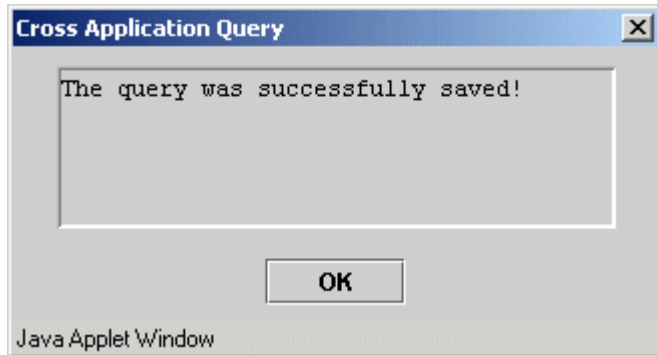
11. Click OK to clear the confirmation message.

12. Click Close to close the Cross Application Query Configuration dialog box. When the AppXtender Web Access window appears, the new cross-application query is listed beneath each application that it is configured to use.

Figure 119. Cross App Query–Applications Window View
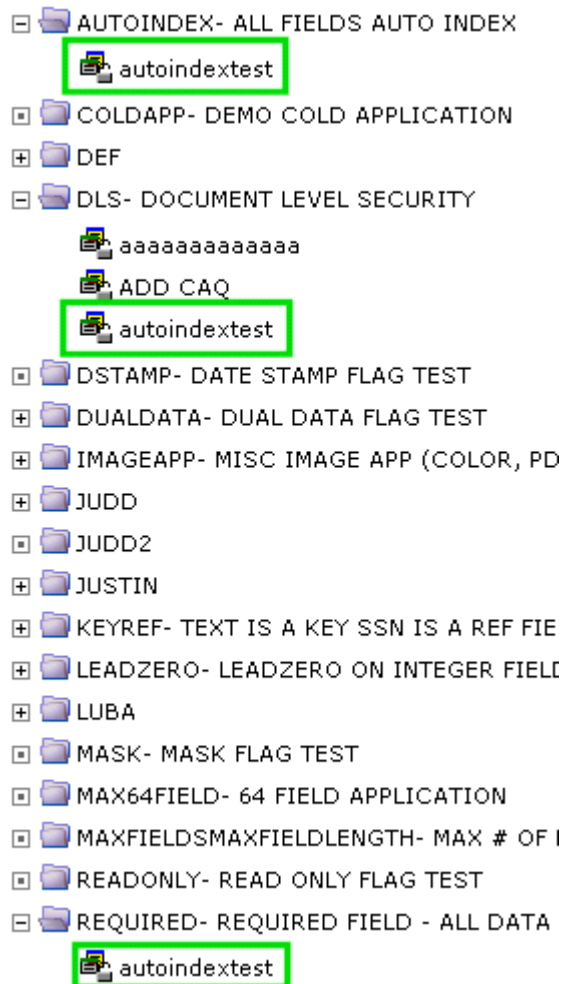
The icon for a cross-application query is different than the icon for other queries, as shown in the following example.

Figure 120. Query Type Icons
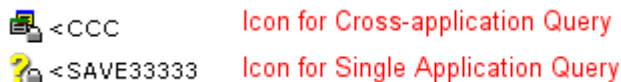
Using a Cross-Application Query

After creating a cross-application query, you can enter search criteria and run the query. You can use wildcards, expressions, full-text, and combination queries when entering the search criteria. For information on entering criteria for advanced searches, refer to Creating a New Query, page 150.

Pre-configured cross-application queries appear on the AppXtender Web Access window beneath each application that they are configured to search.

To add search criteria to cross-application query fields:

1. Right-click the cross-application query you want to run. When the shortcut menu appears, select Edit.

   Note: The icon to the left of a query signifies the type of query. The Cross App Query icon identifies cross-application queries. A question mark icon identifies regular queries.

   The search criteria page appears.

   Figure 121. Cross Application Query Search Criteria Page

Show	Index Name	Search Value
☑	DATE	
☑	SSN	
☑	TEXT	
☑	TIME STAMP	

   Index fields that were configured to be searchable when the query was first created are listed by index name.

2. Select the check boxes for the indexes you want to search.

3. Enter the values that you want to search for into the Search Value fields to the right of the index names. To include all documents for the selected applications in Query Results view, leave the Search Value fields blank.

   Note: To hide an index value from the query results, clear the Show check box for the corresponding index name.

4. Click Save to save your changes.

5. Click Submit to run the query.

Running a Cross-Application Query

After creating a cross-application query and specifying the search criteria, you can run the query directly from the AppXtender Web Access window. For more information about configuring cross-application queries, refer to Configuring a Cross-Application Query, page 166.

To run a cross-application query, right-click the query listing. When the shortcut menu appears, select run.

When the query successfully completes, Application Query Results view appears with a list of hits (documents that met the search criteria). The number of hits appears at the top of the result set listing. Each hit is listed by application, with the fields that were specified as searchable or displayable when you configured the query. (For information about configuring fields to appear in Application Query Results view for cross-application queries, refer to Configuring a Cross-Application Query, page 166.)

The maximum number of results displayed in Query Results view will not exceed the number configured in the Limit Search Size box on the Search/Result Set page of the Settings dialog box, multiplied by the number of applications included in the cross-application query. For example, a cross-application query that applies to three applications run in a AppXtender Web Access session that allows for 50 maximum query results will return the first 50 results from *each* application and yield a maximum of 150 query results in Query Results view.

Figure 122. Cross Application Query Results View

You can open one or more documents from Query Results view. For more information, refer to Displaying Documents from Query Results View, page 180. You can also print, perform a text search on, delete, and e-mail documents, as well as export selected COLD documents. For more information, refer to the following topics:

- Navigating Through Pages in Query Results View, page 183

- Printing Selected Documents, page 186

- Exporting Selected COLD Documents, page 188

- Performing a Text Search on Selected Documents, page 188

- Deleting Selected Documents, page 189

- E-Mailing Selected Documents, page 189

Note: AppXtender/AppXtender Web Access security affects cross-application queries on an application and document security level. For example, if your application security setting restricts you from viewing one of the applications included in a cross-application query, only documents from applications that you can view will appear in Query Results view. In addition, if you are restricted from viewing certain documents using AppXtender's Document Level Security, restricted documents are not retrieved during a cross-application query. If you have questions about your security privileges, consult your AppXtender/AppXtender Web Access system administrator or refer to the "Managing Security" section of the *ApplicationXtender Installation Guide*.

Searching Document Properties

AppXtender Web Access allows you to search for documents based on document properties (attributes). These properties include title, author, subject, owner, comment, and keywords.

Table 34. ODMA Attributes

Property	Description
[Title]	Searches document titles.
[Author]	Searches document authors.
[Subject]	Searches document subjects.
[Owner]	Searches document owners.
[Comment]	Searches document comments.
[Keywords]	Searches document keywords.

Refer to the following topics for more information:

- Selecting ODMA Attribute Search, page 174

- Searching Using ODMA Attributes, page 174

Selecting ODMA Attribute Search

In order to search document properties, you must select ODMA attribute searching from the Settings dialog box.

To select the ODMA attribute searching option:

1. Select Edit> User Settings from the AppXtender Web Access menu bar. The Settings dialog box appears.

2. On the Search/Result Set page, select Enable ODMA Search.

3. Click Save.

Searching Using ODMA Attributes

When ODMA attribute searching is selected on the Search/Result Set page, document attribute options appear on the search criteria page. ODMA attribute index fields are listed below the application index fields on the search criteria page. Each attribute index field name is enclosed within square brackets.

Figure 123. ODMA Attribute Index Field Search Criteria

To search by ODMA attributes:

1. Access the search criteria page.

2. Enter search criteria in the Search Value text boxes for the indexes and ODMA attribute indexes that you want to search. Refer to Creating a New Query, page 150 or Editing a Saved Query, page 178 for more information about creating or editing queries.

3. Click Submit to start the search process. When the search completes, if only one document satisfies the search criteria, that document opens in Document Display view. If two or more documents satisfy the search criteria, those documents are listed in Query Results view.

Working with Saved Queries

You can save AppXtender Web Access queries so that you can use them multiple times. This allows you to execute the query quickly from the AppXtender Web Access window. When you create a saved query, you can make the query available to all users. Otherwise, it will be a private query that only you can access.

For more information on working with saved queries, refer to the following topics:

- Saving a Query, page 176

- Running a Saved Query, page 178

- Editing a Saved Query, page 178

- Renaming a Saved Query, page 179
- Deleting a Saved Query, page 180

Saving a Query

You can save any query that you create, whether it is a standard AppXtender query or a cross-application query.

To save a query:

1. Enter query values on the search criteria page as described in Creating a New Query, page 150.

2. In the Save Options section, enter a name for the query in the Query Name text box.

**Figure 124. Save Options Section on Search Criteria Page**

3. To allow all users to access the query, click the Available To All Users check box. A check mark appears in the box, indicating the query is a shared query.

   In the default setting, shown in the previous figure, the check box is unchecked. This indicates that the query is a private query that only you can access.

4. Click OK. The query is saved.

Saved queries are listed under the associated application on the AppXtender Web Access window.

Figure 125. Saved Queries for Application
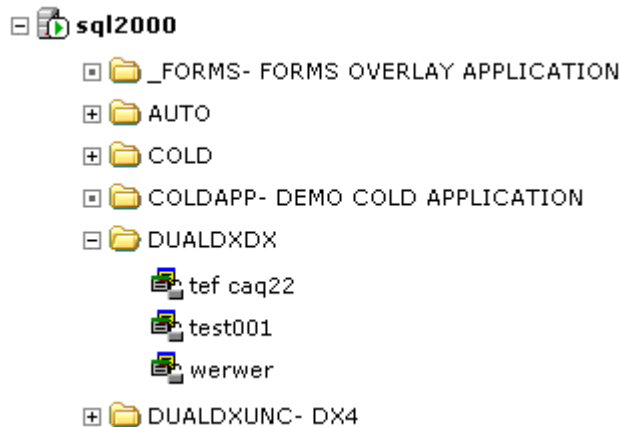
Identifying Public and Private Queries on the AppXtender Web Access Window

When a query is saved, the name of the query is listed with the application to which it belongs on the AppXtender Web Access window.

A locked padlock next to a query name indicates that the query is private—only the person who created the query can access the query. An unlocked padlock next to a query name indicates that all AppXtender Web Access users can access and run the query.

Figure 126. Private Query and Public Query Icons
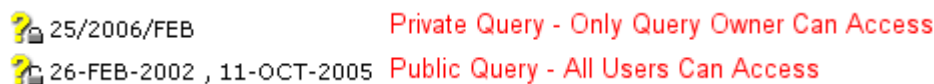
Note: Even if a cross-application query is listed as public, you can see the query only if you have access to at least one of the applications used in the query. Also, if you do not have access to all applications within a cross-application query, the query results do not show matches from the restricted applications. If you have questions about your security privileges, contact your AppXtender/AppXtender Web Access system administrator or refer to the "Managing Security" section of the *ApplicationXtender Installation Guide.*

To change the availability setting for a query using Internet Explorer:

1. Right-click the name of the query you want to work with, and select Properties from the shortcut menu. The Query Dialog box appears.

Figure 127. Query Properties Dialog Box
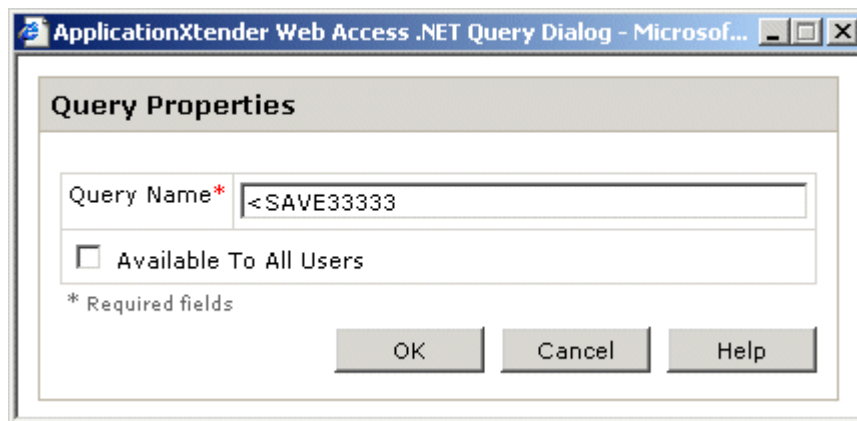
2. Based on the current check box setting, perform one of the following steps:

    • To make a public query private, click the Available To All Users check box to clear the check mark from the box.

    • To make a private query public, click the Available To All Users check box to display a check mark in the box.

3. Click OK.

Running a Saved Query

You can run saved queries directly from the AppXtender Web Access AppXtender Web Access window.

To run a saved query:

1. On the AppXtender Web Access window, click on the plus sign (+) next to the application you want to query. The list of saved and cross-application queries for that application appears.

2. Double-click the query you want to run. The query process begins. When it completes, Query Results view appears.

Editing a Saved Query

You can edit any saved query from the search criteria page.

Note: You can also edit cross-application queries. For more information, refer to Using a Cross-Application Query, page 171.

To edit a saved query:

1. On the AppXtender Web Access window, right-click the query name and select Edit from the shortcut menu. The search criteria page appears with the current search criteria for the query.

2. Edit the search criteria.

3. Click Save.

Renaming a Saved Query

You can rename any of your saved queries.
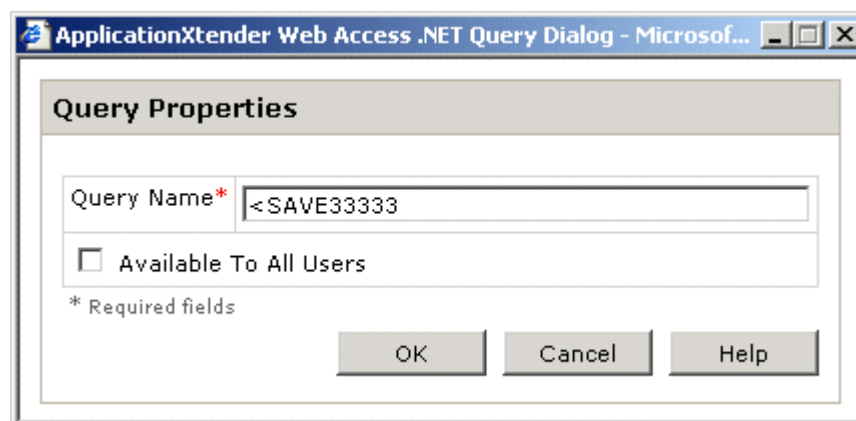
To rename a saved query:

1. On the AppXtender Web Access window, expand the application node that contains the query you want to rename.

   Figure 128. Expanded Application Node

2. Right-click the query you want to rename, and select Properties from the shortcut menu. The Query Properties dialog box appears.

   Figure 129. Query Properties Dialog Box

3. In the Query Name text box, replace the existing name with the new name.

4. Click OK. The query name on the AppXtender Web Access window is updated to show the new name.

Deleting a Saved Query

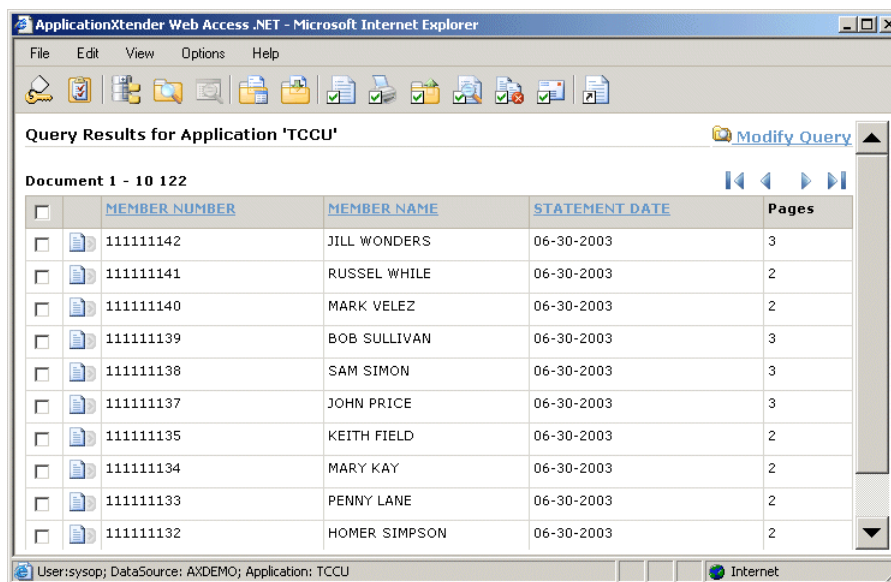If necessary, you can delete a saved query.

To delete a saved query:

1. Right-click the query name on the AppXtender Web Access window and select Delete from the shortcut menu. A dialog box appears, asking you if you are sure you want to delete the selected query.

2. Click OK to continue. The selected query is deleted, and the AppXtender Web Access window is refreshed.

Displaying Documents from Query Results View

Query Results view lists the document records that match the most recent search criteria. The records are arranged in table format, with a column for each index field and a row for each of the returned index values. Results can be sorted in ascending or descending order, based on any available index term.

Figure 130. Query Results View

Note: When no search results are retrieved, a "No documents found" message appears.

With the exception of the selection columns to the left, the number and type of data columns in Query Results view can vary depending on the type of search performed (Search by Index, Search by Wildcard, Search by List of Values, Expression Search, Full-Text Search, or Combination Search).

The first column on the left in Query Results view is the document selection column. To select a document to work with, select the corresponding check box. To cancel a selection, click the check box to remove the check mark.

To the right of the document selection column is a status column. The icons in this column indicate whether the document in the result set is the latest version of the document or a previous revision and whether the document is currently checked out. The following table explains the meaning of each icon.

Table 35. Result Set Page Status Column Icons

Icon	Description	Meaning
	Blue page	Indicates the latest version of the document.
	Grey page	Indicates a previous revision of the document. You can open previous revisions only in read-only mode.
	Check mark on page	Indicates a user has checked out the document. When you check out a document, you are the only user who can modify the document. Other users opening the document can access the document only in read-only mode.
		Once you check out a document, it remains checked out to you until you check it back into the repository, even if you need to work with the document over multiple AppXtender Web Access sessions.
	Clock face on page	Indicates the document has been filed for Centera retention, AppXtender software retention, or Records Manager retention. You cannot modify a document under retention; however, you can check out the document and create a new version of the document. For information on filing a document for retention, refer to Filing Documents for Retention, page 298.
		Before you can modify a document that is filed for Records Manager retention, you must check the document out. For information on filing a document for Records Manager retention, refer to Appendix B, Working with Records Manager for ApplicationXtender

The arrow on the right of each page icon accesses a function menu.

Figure 131. Arrow to Access Function Menu

When you click the arrow, a page function menu appears. From this menu, assuming you have the necessary privileges, you can open the document; export, e-mail, or print the document; perform an ad hoc text search on the document; or delete the document. In addition, you can add a link to the

document to your browser favorites list or copy the link, if desired. If the document is a PDF, you can select View as PDF to open the PDF file in Document Display view.

Figure 132. Document Options Menu - Query Results View

Note: For information on working with documents, refer to Thin Client Document Display View Functionality, page 211, Interactive Client Document Display View Menu Bar and Toolbar, page 223, or Using E-Mail Functionality, page 287.

Page icons are also used to represent documents that are available to be filed for retention or transferred using the Records Manager for AppXtender interface. An icon of a page with a right-facing arrow coming out from behind the page means the document is available to be added to Records Manager for ApplicationXtender. Depending on the requirements, you can file the document for retention, classify and transfer the document, or file the document for retention and then classify and transfer the document.

Note: When both procedures are required for a document, file the document for retention first and then do the classify and transfer procedure. Once documents are classified and transferred to Records Manager for AppXtender, they are removed from the search results list and can no longer be accessed from ApplicationXtender Web Access.

The icon for documents that have been filed for retention is similar to the icon for available documents but with the addition of a clock face on the page.

Note: For information about filing AppXtender documents for retention using RM, refer to Filing AppXtender Documents for Retention Administration, page 314. For information about transferring AppXtender document to Records Manager for AppXtender, refer to Transferring AppXtender Documents for Records Management, page 313. For information about filing documents for Centera retention or AppXtender software retention, refer to Filing Documents for Retention, page 298.

To display a document from Query Results view, click the icon for the document in the result set that you want to view. The document view page opens in a separate window, and the document appears.

To display multiple documents from Query Results view, click the selection check box for each document. Then click the Open Selected Documents icon.

Note: When Check In/Check Out is selected, if you open a document that another user already has open, you must view the document in read-only mode. For more information on Check In/Check Out, refer to Check In/Check Out Mode, page 47.

For more information about ApplicationXtender Web Access Query Results view, refer to the following topics:

- Using Query Results View Features, page 183

- Navigating Through Pages in Query Results View, page 183

- Sorting Results in Query Results View, page 184

Using Query Results View Features

The AppXtender Web Access result set page offers several features to enhance navigation and query result display. These include the following:

- You can sort result set lists in either ascending or descending order based on available index terms. If you cancel a sort, the result set order reverts to its original state.

- When the number of retrieved documents exceeds the number set to appear in Query Results view, navigation features become available.

- You can perform text searches and print and e-mail selected documents, export COLD documents, perform text searches, and delete selected documents directly from the result set.

For more information on using these features, refer to the following topics:

- Navigating Through Pages in Query Results View, page 183

- Sorting Results in Query Results View, page 184

- Using Queries in ApplicationXtender Web Access, page 146

- Working with Saved Queries, page 175

- Displaying Documents from Query Results View, page 180

Navigating Through Pages in Query Results View

You specify the maximum number of results you want to appear on each result set page from the Search/Result Set page on the Settings dialog box. When the specified maximum number of search results per page is reached in the results set, the list continues on to another page.

When there are two or more result set pages, use the buttons on the right at the top in Query Results view to navigate through the pages.

Figure 133. Result Set Navigation Buttons
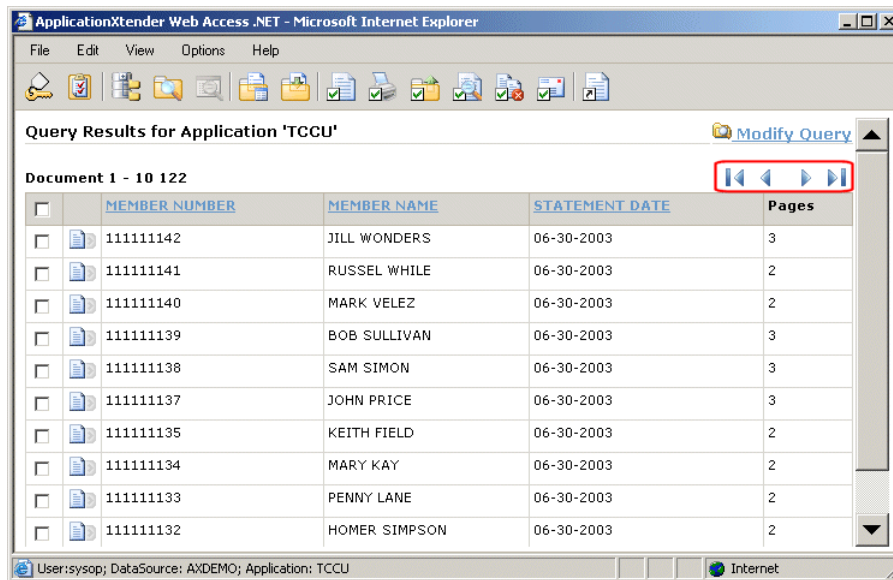
To navigate through result set pages:

- Click the next page button ( ) to go to the next page of the result set.

- Click the last page button ( ) to go to the last page of the result set.

- Click the previous page button ( ) to return to the previous page of the result set.

- Click the go to first page button ( ) to return to the first page of the result set.

Sorting Results in Query Results View

Column headings in the query result set that are underlined indicate that the items in the column can be sorted and arranged in ascending or descending order.

Figure 134. Column Heading Indicates Column Can Be Sorted

For columns that are available for sorting, to sort by a particular column, click that column heading. The items in the column are sorted and then the rows in the result set are arranged in the resulting order (ascending or descending).

Modifying a Query

If the documents you are trying to find do not appear in the result set list in Query Results view, you can return to Query view for the selected application and modify the search criteria.

To return to Query View and modify the current query:

- In Query Results view, click the Modify Query link to the upper right.

Figure 135. Modify Search Criteria Link in Query Results View
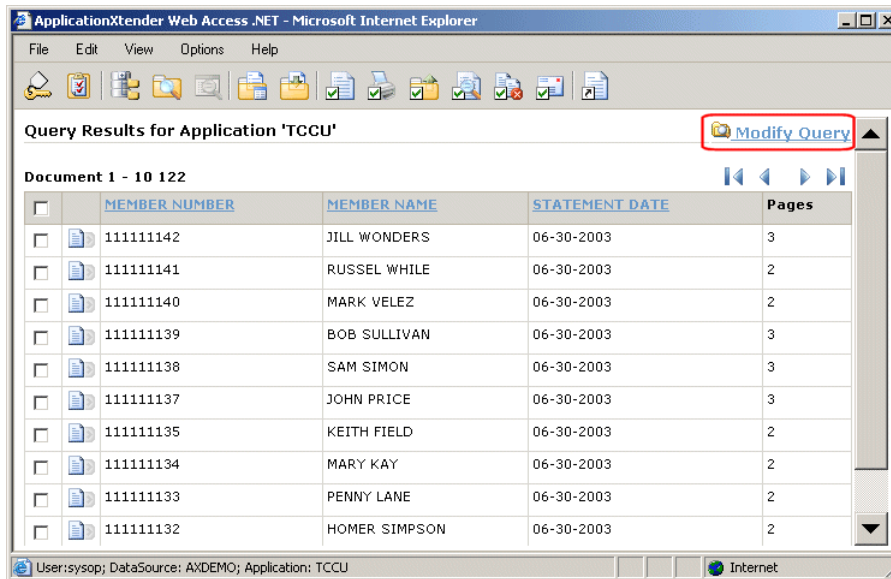
Query Results view is replaced by Query view. You can then modify the search criteria and run the search again.

Using the Query Results View Toolbar

In addition to the Logout and Settings buttons on the toolbar, the Query Results view toolbar features the following buttons:

Table 36. Buttons on Query Results View Toolbar

Button	Description
	Click to return to Application view. Note that after returning to Application view, you can redisplay the results from the previous query in Application Query Results view by selecting View>Query Results,
	Click to access Query view for the selected application and set up a new query. Note that you must run at least one query during a session for this button to be available.

Button	Description
	Click to access Batch List view.
	Click to access Batch Import view.
	Click to open documents selected from the result set.
	Click to print documents selected from the result set.
	Click to export COLD documents selected from the result set.
	Click to export the indexes of the documents selected from the result set.
	Click to perform a text search on documents selected from the result set.
	Click to delete documents selected from the result set.
	Click to e-mail documents selected from the result set.

After the first query you run, an additional button appears in the toolbar—(Application Name) Query View button.

To perform document functions from Query Results view, such as printing selected documents, first select the documents you want to work with by clicking the corresponding document selection check box. Then select the toolbar button of your choice.

Printing Selected Documents

To print selected documents from a result set:

1. In Query Results view, select the selection check boxes for the documents you want to print. To print all of the documents, click the Select All check box (the check box directly above the first document selection check box in the results list).

2. On the toolbar, click the Print Selected Documents button. The Print dialog box appears.

Figure 136. Print Dialog Box
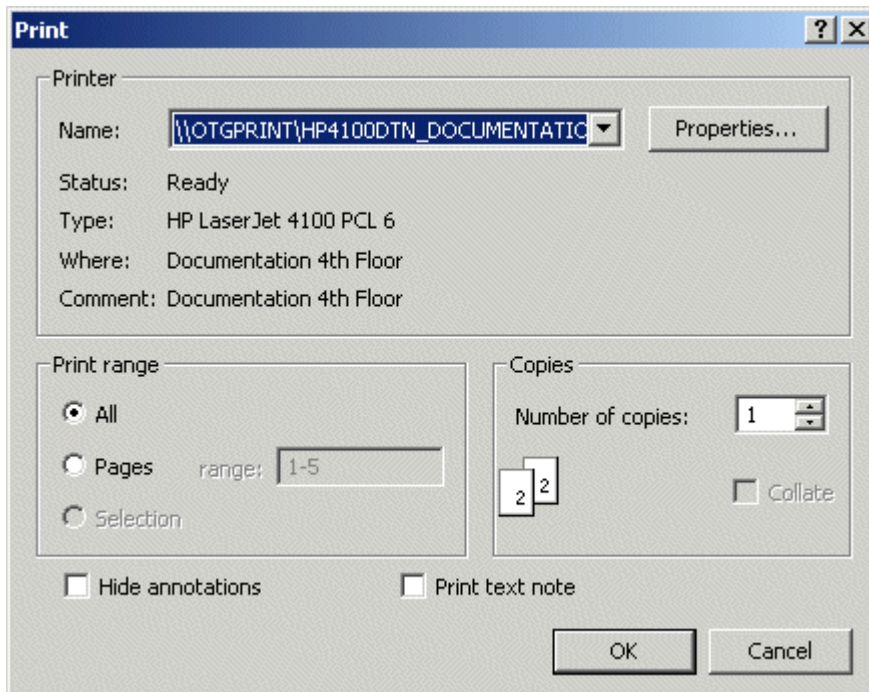
Note: For information about configuring general result set printing options, refer to "Search/Result Set Tab" in Chapter 2, Customizing Your Workstation.

3. If necessary, select another printer from the Name list box.

4. When printing a multipage document, select the appropriate setting in the Print Range section.

   • To print all pages, select All.

   • To print a range of pages, select Pages. Then, in the text box to the right, type the starting and ending page numbers as a range, using <#>-<#> format. To print pages 1 through 11 of a 20-page document, for example, you would type 1-11 in the text box.

   • To print only a single page, Select Pages. Then, in the text box to the right, type the page number in as a range, using<#>-<#> format. Use the same number for both the starting and ending page numbers in the range. For example, to print only page 4 of a document, you would type 4-4.

Note: For single-paged documents, the All selection button is the only option available in the Print Range section of the Print dialog box.

5. In the Copies section, enter the number of copies needed.

6. To hide annotations, click the Hide Annotations check box. A check mark appears in the box.

7. To print text notes, click the Print text note check box. A check mark appears in the box.

8. Click OK to start printing. When printing ends, the Print Log window appears.

9. To clear the print log and return to the result set, click Close.

Exporting Selected COLD Documents

To export COLD documents from a result set:

1. In Query Results view, select the selection check boxes for the COLD documents in the result set that you want to export. To export all of the COLD documents, click the Select All check box.

2. On the toolbar, click the Export Selected COLD Documents button. The Export COLD Document Page(s) dialog box appears.

3. To change the folder in which the exported documents will be saved, select the desired folder from the Save in list box.

4. In the File name field, enter a name for the exported file.

5. Click Save. The selected documents are exported to the specified folder.

   When the process ends, a message appears asking if you want to view the export log.

6. To view the export log, click Yes. To clear the message without viewing the log, click No.

Performing a Text Search on Selected Documents

After submitting a query and receiving a list of documents matching the search criteria, you can further refine the results by performing a text search on the records in the result set.

To perform a text search on records selected from a result set:

1. In Query Results view, select the selection check boxes for the documents you want to include in the text search. To include all of the documents, click the Select All check box.

2. On the toolbar, click the Text Search Selected Documents button. The Text Search window opens.

3. Type the text you are searching for into the text box.

Figure 137. Search Criteria Entered
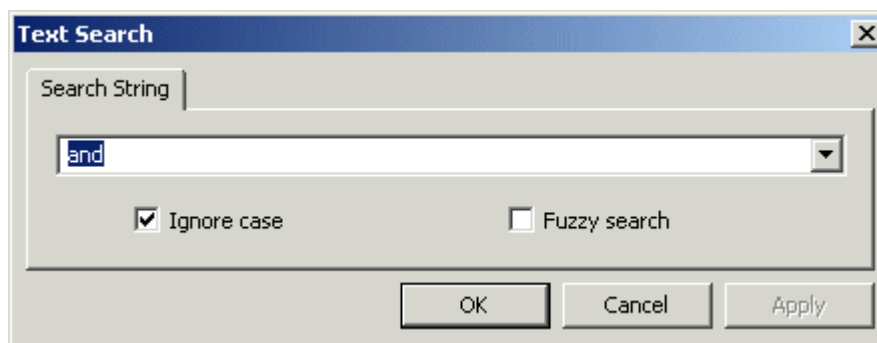
If your are searching for text used in a previous search, click the arrow button to access a list box of available text criteria. Then select the criteria you want to use.

4. To find any combination of uppercase and lowercase text that matches the criteria, click the Ignore case check box to clear the check mark.

5. To make the search a fuzzy search, click the Fuzzy search check box. A check mark appears in the box.

Note: When you select Fuzzy Search, ApplicationXtender Web Access also returns text that may not exactly match the search criteria. For example, when searching for the word "safe" with Fuzzy Search selected, AppXtender Web Access could also return the words "sale," "same," and "cafe" because the first or last two letters in each word match the corresponding letters in the search term. AppXtender Web Access would not return "case" or "fame" because the spelling of those words differs too much from the search term.

6. Click OK. The Text Search window refreshes. Search processing information appears in the upper part of the window, and the results appear in the lower part. Each instance of the specified text string appears as a link in the text.

7. To view any document in the list of text search hits, click the link in the entry for the document you want to view.

Deleting Selected Documents

To delete selected documents from a result set:

1. In Query Results view, select the selection check boxes for the documents you want to delete. To delete all of the documents, select the Select All check box (the check box directly above the first document check box in the results list).

2. On the toolbar, click the Delete Selected Documents button. A confirmation message appears.

3. To delete the documents, click Yes. After the documents have been deleted, a message appears asking if you want to view the delete log.

4. To see the delete log, click Yes. To clear the message without viewing the log, click No.

   When Query Results view is refreshed, the deleted documents are no longer in the result list.

E-Mailing Selected Documents

Using ApplicationXtender Web Access, you can e-mail documents, pages, and links to AppXtender Web Access documents and pages.

Note: To e-mail documents and pages in AppXtender Web Access, you must first register your e-mail address as described in Chapter 6, Viewing Documents.

To e-mail selected documents:

1. If you are e-mailing documents from the result set, select the check boxes for the documents you want to send. To e-mail all of the documents, click the Select All check box (the check box directly above the first document selection check box in the results list).

2. On the result set or Document Display view toolbar, click the Email Selected Documents button. The Email Selected Documents From Resultset dialog box appears. The From: field is automatically populated with your e-mail address.

   Note: If the ApplicationXtender Web Access E-Mail Address Registration ID Request appears instead of the Compose Electronic Mail Message form, your e-mail address is not registered and you cannot send e-mail. Before proceeding, register your e-mail address following the instructions in "Registering Your E-Mail Address" in Chapter 6, Viewing Documents.

3. Click the To: link to access the E-mail Address Book and select a recipient. Or, type the recipient's e-mail address in the To: text box.

    Note: To select recipients from the E-mail Address Book, click the To: check box for each address you want to include. Then click OK to close the address book. The To: text box is automatically populated with the selected recipients.

4. Repeat step 3 for any carbon copy (Cc) or blind carbon copy (Bcc) recipients to whom you want to send the e-mail.

5. Type the subject in the Subject text box.

6. From the Message Format list box, select the HTML or text as the format.

7. From the Attachments list box, select Entire Document or Page Range.

    If you select Page Range, type the starting and ending page numbers in <#>-<#> format in the Page Range text box.

    Note: If you select Entire Document, the Page Range option is unavailable.

8. To send attachments as a hyperlink appearing in the message body, select the Send attachments as hyperlinks check box.

    Note: ApplicationXtender Reports Management reports *must* be e-mailed as hyperlinks.

    ⚠️ **Caution:** When e-mailing documents as hyperlinks, be aware that authentication is still required to access the hyperlinked documents. Recipients of e-mailed hyperlinks must have the appropriate permissions within AppXtender and AppXtender Web Access to view the documents.

9. If you want to apply IRM protection to the documents you are e-mailing, click the **Restrict access to sensitive information** check box. This check box appears only if ApplicationXtender with IRM is configured for the current application. If IRM protection is *required* for the application, this check box is already selected and you cannot deselect it. In this case, you *must* apply an IRM policy to the content before e-mailing it.

    Note: The **Restrict access to sensitive information** check box is disabled if you selected the **Send attachments as hyperlinks** check box in Step 8 because the content is already protected by ApplicationXtender.

10. In the Message text box, type the message that you want to send with the document or page.

11. When you are ready to send the e-mail, click Send.

    Note: If your browser times out, the e-mail will be sent from the server.

12. If the **Restrict access to sensitive information** check box described in Step 9 is selected, the Select Policy dialog box appears. Complete the options on the Select Policy dialog box using the procedures in Specifying IRM Options, page 285, if necessary, then click **OK**.

13. After the email is successfully sent, click Close on the Send Email Status dialog.