LAREDO ANYWHERE USER GUIDE

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LAREDO ANYWHERE

SEARCH GUIDE

(**NOTE:** This manual is a work in progress and will be modified as Laredo Anywhere is updated.)

CREATING A LAREDO ANYWHERE ACCOUNT

NOTE: Creating a Laredo Anywhere account does not add any additional cost to your Laredo subscription, nor does it automatically allow you to begin searching; users must have a Laredo subscription first before linking the counties in which they have a subscription to their Laredo Anywhere account.

1. Open your internet browser and go to www.LaredoAnywhere.com.

2. Click **Create account** (see the image on the right). The **Create Account** page shown below will display.
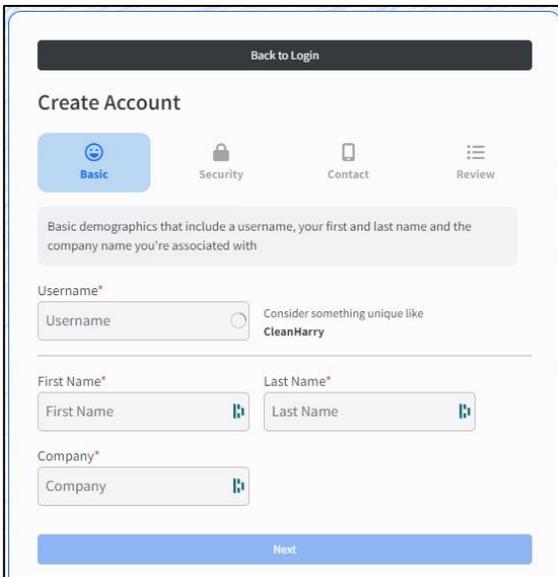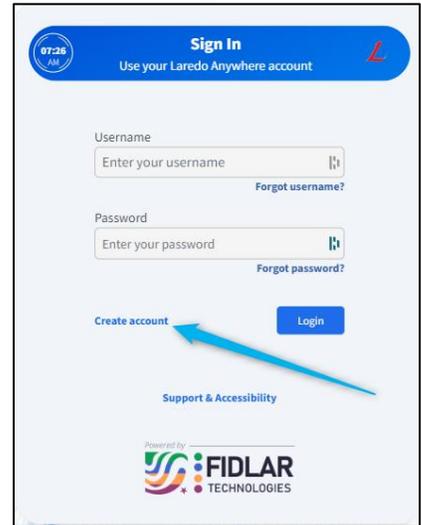
3. In the **Basic** screen, enter a **Username** then fill in the rest of the fields. When selecting your username, please remember that you will not be able to change it after completing the signup process. Also, when navigating through the account creation process, please be sure to enter accurate information.

NOTE: Fidlar Technologies and our county partners take your privacy and data security very seriously. The information provided will never be sold or abused.

4. Click **Next**.

5. In the **Security** screen, enter your desired **Password** then reenter the same password in the **Confirm Password** field. When creating a password, please note that it must be at least eight (8) characters long. Also, this is a unique password of your own creation; you do **not** need to utilize your Laredo program password.

   NOTE: This password can be changed by the Laredo user at any time. See page 54 for details on this process.
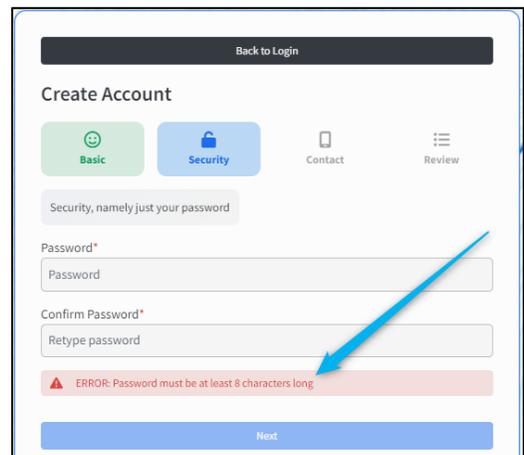
6. Click **Next**.

7. In the **Contact** screen, enter your **Email Address** and **Phone** number. When entering your email address, please be sure to use one that is monitored regularly.

8. We recommend leaving the **Allow alerts to be sent to this email address?** option set as **Yes** so as not to miss any important communications.

NOTE: This contact information will be used to communicate important updates as well as for username/password retrieval.

9. Click **Next**. The **Review** screen shown below will display.

10. Please be sure to review your information carefully before clicking the **Create Account** bar at the bottom of the page.

11. To log into Laredo Anywhere, enter your **Username** and **Password** in the **Sign in** screen then click **Login**.

LINKING A COUNTY LAREDO SEARCH ACCOUNT

Once you have set up your general Laredo Anywhere account, you will need to link your county-specific Laredo account(s) to the Laredo Anywhere account. Please be sure that you have created a Laredo Anywhere account (see the steps noted above). Additionally, you will need to have signed a Laredo agreement with each county in which you will be searching and received a username/password for utilizing Laredo.

1. Log in to your Laredo Anywhere account then click the **Add County** option in the dashboard screen to begin the process of linking your county Laredo search account. The account setup wizard screen shown below will display.


☺ Your counties

Search your counties ✕

Select a county to begin your search

Add County
+

2. Select the relevant **State** and C**ounty** in which you would like to search for land records.

NOTE: If you see a **Multi** tag next to a county, this means that the county will allow you to link multiple Laredo search usernames from your county subscriptions to the same Laredo Anywhere account. This allows users sharing usernames/passwords to have their own Laredo Anywhere accounts to accommodate their unique searching needs.

Ozaukee County	**Multi**

3. Enter your Laredo **Username** and **Password** in the appropriate fields then click **Add County** to complete the process. You will see a confirmation similar to the one shown below at the bottom of the window.

Successfully added Ozaukee County, Wisconsin

4. You may repeat the above three steps to add additional counties to your Laredo Anywhere account or click the **X** in the top right corner of the wizard to exit.

5. Once a county Laredo login username has been added to your Laredo Anywhere account, a "tile" listing that Laredo username will display on your Laredo Anywhere dashboard screen.
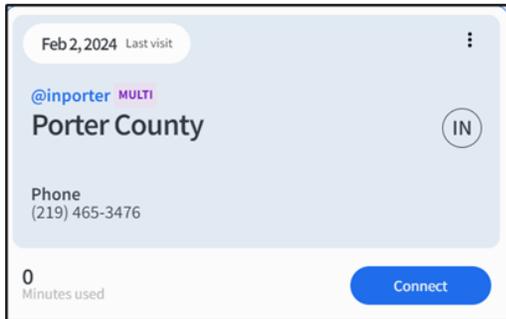
6. Each county's Laredo login tile will display the following information:

a. The date you last logged into Laredo for the particular county

b. The Laredo username, preceded by the **@** symbol (e.g., "@inporter")

c. The **MULTI** user identification if the county allows for this functionality (see Page 5 for details)

d. The state and county name for this Laredo user

e. The phone number for this Laredo County

f. The number of minutes this particular Laredo username has been logged into Laredo for the current month

7. To remove a Laredo username tile from your Laredo Anywhere dashboard, click the 3 dots in the upper right corner of the tile.

a. Click **Remove**.

b. **NOTE:** Removing a county Laredo account from your Laredo Anywhere dashboard does NOT delete that county's Laredo account. You will still need to contact the county office to cancel your Laredo subscription if desired.
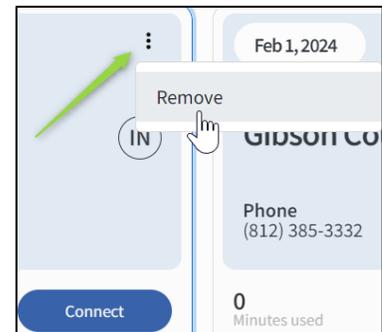
LOGGING INTO LAREDO

NOTE: The steps below assume that you have set up your general Laredo Anywhere account and have linked a specific county's Laredo account to Laredo Anywhere.

1. Once you have logged into Laredo Anywhere, click the desired county's **Connect** button in the dashboard screen. You will be auto-logged into Laredo.

   NOTE: Once you enter your username and password in the **Add a county** screen shown on the previous page, you will not need to enter your username and password again to open Laredo.

2. If you log into a remote (billable) Laredo account, a screen similar to the following will display when you log in each time.
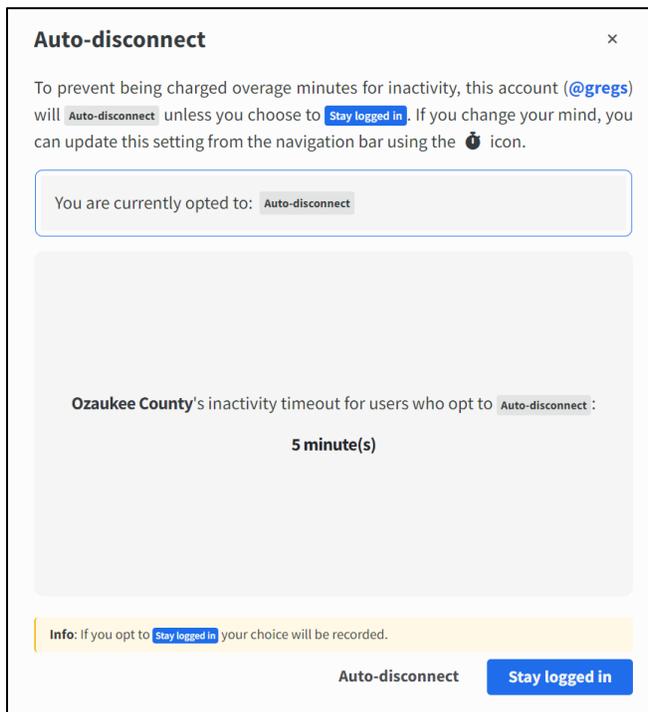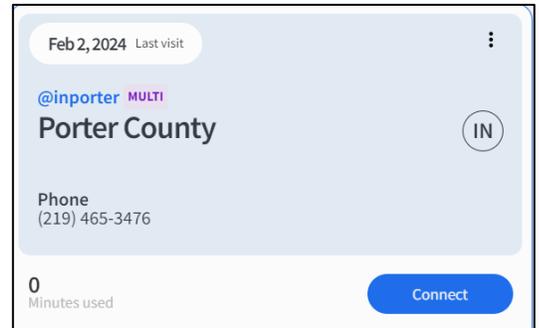
a. To auto-disconnect from Laredo after a county-defined amount of inactivity in Laredo, click the **Auto-disconnect** option at the bottom of the screen. This is recommended if your Laredo billing plan is not an unlimited minute plan.

b. To stay logged into Laredo, even if there is no activity in the program for a period of time, click the **Stay logged in** option at the bottom of the screen.

NOTE: Selecting the **Stay logged in** option could result in being billed for overage minutes by the county for Laredo usage that exceeds your per-minute plan (if applicable).

c. If you are utilizing Laredo as an "Internal" user (for example, as a county employee), the **Auto-disconnect** window will not display.

LAREDO MENU – PART 1

When you first log into a county Laredo account from the Laredo Anywhere dashboard, the menu bar shown on the left side of the image below will display with the **User News** section open. See below for a description of each menu item in the menu bar.
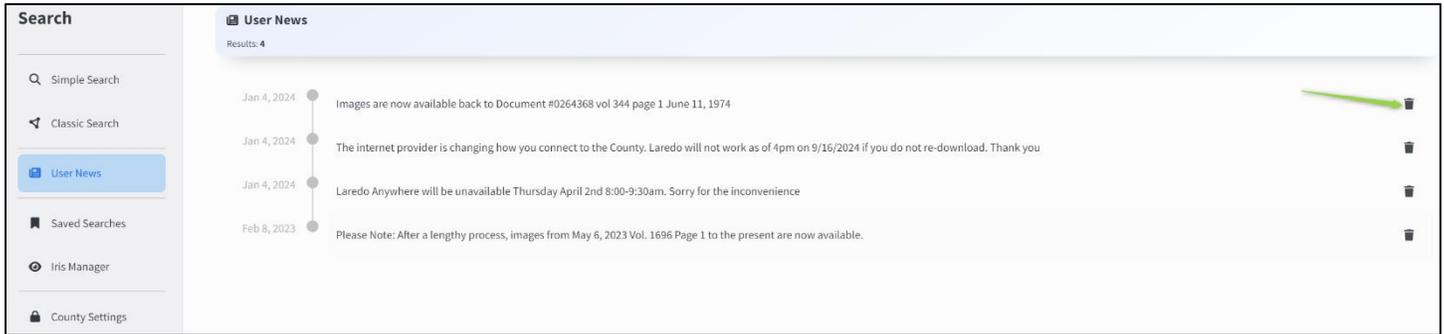
NOTE: Depending on the county's Laredo configuration, the left menu bar may display in a collapsed view (see the image on the right). In the collapsed view you can hover the mouse over any icon in the menu bar to display a popup description of the item.

1. To expand the menu bar view, click the double **Arrow** at the top of the menu bar.

USER NEWS

The User News section is utilized by the county to send relevant messages to the county's Laredo users. It is recommended that you read these messages each time you log into Laredo.

1. To delete any **User News** messages, click the delete **Trash can** icon on the right side of the message.

CLASSIC SEARCH

1. To begin searching for documents, click **Classic Search**. The search criteria screen will display.

NOTE: See sections later in this manual for a description of the rest of the items in the Laredo menu bar.

The Classic Search criteria screen:

The following information is displayed at the top of the Classic Search screen:

a. The county you are logged into

b. The Laredo username that is logged in

c. The number of minutes you have been logged into Laredo for the current session

d. The recording dates that the county is indexed and verified (audited) up to

e. The **Disconnect** button for disconnecting from the current session of Laredo

PARTY NAME & DOCUMENT INFORMATION SEARCH

PARTY NAME SEARCH

1. To search by party name, enter the last name in the **Name** field followed by a comma or space (depending on the particular county's indexing format) then a portion or all of the first name. For a business name, enter the entire business name or the first portion of the business name.

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2. Click **Add** then click the **Run** bar at the top of the screen to display the search results. (See the "**SEARCH RESULTS**…" section on page 18 for details on viewing data and images in the search results.)

ADDITIONAL PARTY NAME SEARCH TIPS:

2. To search for multiple names in one search, enter each party name then click **Add** after entering each one. The search results will return records for all party names added.
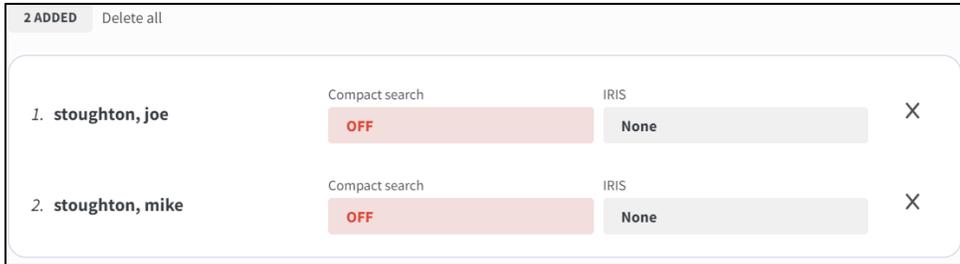
a. Click the **X** to remove any of the names you have added. To remove all of the names you have added, click the **Delete All** option above the top name.

3. If you are uncertain of the spelling of a party name, enter the **%** symbol (the wildcard in Laredo) anywhere in the beginning or middle of the name. For example, to search for the last name "Fisher" and "Fischer", enter "Fis%er". The single wildcard will fill in multiple letters. (**NOTE:** There is automatically an unseen wildcard at the end of any value you enter in the **Name** field so there is no need to enter one at the end.)

a. **TIP:** For party names entered as trusts, or government entities such as township names, sheriff names, city officials, etc., it is often helpful to enter the wildcard (**%**) in the beginning of the **Name** field.

4. To ignore possible spaces and punctuation in names, select **On** in the **Compact search** option before you click the **Add** button. For example, with **Compact search** set to **On**, a search for "Walmart" will return results for "Wal-mart", "Wal Mart", etc. Additionally, a search for "Oneil" will return results for "O'neil".

a. If you forgot to click **Compact search** before you added the name, click **OFF** in the **Compact search** box next to an added name (see image above) to activate Compact search.

5. To apply any alias names you have created in IRIS, click either **County** or **User** in the **IRIS** option of the **Party** name search criteria.

NOTE: See the **IRIS MANAGER** section on page 44 for a description of how to create and modify alias party names, addresses, and subdivision names.


a. If you forgot to click an **IRIS** option before you added the name, click **None** in the **IRIS** box next to an added name (see image above) to activate the "County" or "User" IRIS list for the search.

DOCUMENT INFORMATION SEARCH

NOTE: Any number of search criteria listed above or below can be combined in one search.

1. To search by a specific document number or document number range, enter the beginning document number in the **Start number** field then press **Tab** to enter the **End number** field. You can overwrite the same document number with a later document number in the ending field to search for a range of document numbers.

2. To search by a recording date range, click in the **Start date** field then type the desired starting date. Press **Tab** – the current date will auto-display in the **End date** field but you can overwrite this with any date you wish. You can also click on the blue calendar on the right side of the **Start date** and **End date** fields to select the desired dates on the calendar that displays.

3. To narrow your search criteria to a particular document type or grouping of document types, click in the **Select a group** field in the **Search group** section. To select the desired document type or search group:

   a. Scroll down to the desired document type or search group and click it. You can also press the **Down** or **Up Arrow** on the keyboard until the correct document type or search group is highlighted then press the **Enter** key.

   b. Or, begin typing the document type or search group you wish to search by; all document types and search groups that match the letters typed will display; click the correct one.
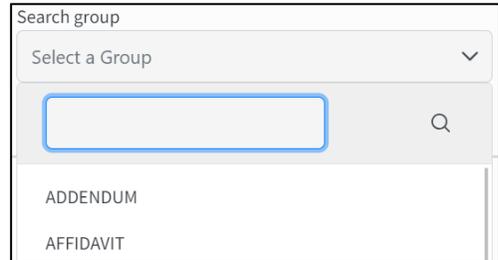
4. To search by a particular memo (note) value, enter the value in the **Memo** field.

NOTE: The **Memo** field is not utilized in all counties. If a county does enter data in this field, it is typically a general notes field. (In earlier versions of Laredo, this field was called the "Reference Number" field.)

5. When the correct document criteria has been entered, click **Run** at the top of the screen to display the search results.

   a. **TIP:** If you are uncertain of the spelling of a note in the **Memo** field, or are not sure of how the value was indexed, enter the **%** symbol (the wildcard in Laredo) anywhere in the beginning, middle, and/or end of the value you enter in the field.

6. See the **SEARCH RESULTS…** sections on pages 18 and 22 for details on viewing images and data in the search results screen.

ADDITIONAL CRITERIA SEARCH

NOTE: The search fields displayed in the image above may not be the same for every county since some counties do not index data in certain fields; in these counties, the fields may be hidden from view in Laredo.

SUBDIVISION

1. To search by subdivision, click **Subdivision** in the **Additional Criteria** section. The screen shown above will display.

2. To select a subdivision by the subdivision name, click in the **Name** (**Select a Subdivision**) field; a list of subdivisions will display. You can either scroll down the list of subdivision names with the mouse wheel or **Down Arrow** on the keyboard then select the desired subdivision or you can filter the list by typing a few letters of the desired subdivision name in the search field; a list will display all subdivisions that match the characters entered.

    a. To select the subdivision by the subdivision short code, click the **Use Long Codes** toggle to change the option to **Use Short Codes**.

    The subdivisions will then be listed in the **Name** field by short code.

3. Select the correct subdivision name.

4. If you wish to narrow your search to a particular **Lot/Unit**, **Block**, and/or **Outlot** value, enter the values in these fields.

5. Click **Add**.

6. Click **Run** at the top of the search screen to run the search.

ADDITIONAL SUBDIVISION SEARCH TIPS

7. To search for multiple subdivisions (or multiple Lots, Blocks, and/or Outlots) in one search, enter each subdivision value then click **Add** after entering each one. The search results will return records for all subdivision values added.
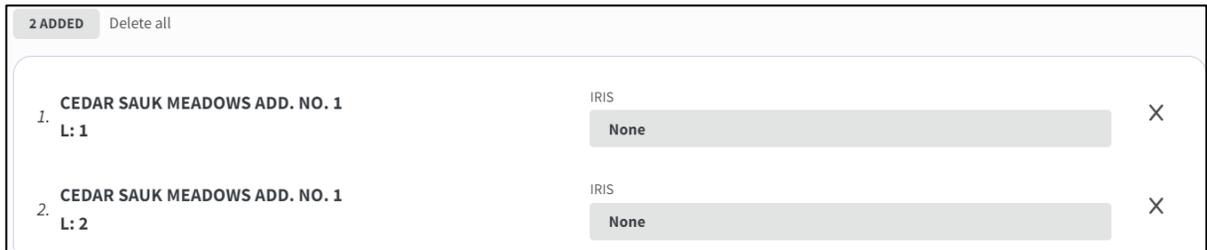
2 ADDED	Delete all		
1.	CEDAR SAUK MEADOWS ADD. NO. 1 L: 1	IRIS **None**	X
2.	CEDAR SAUK MEADOWS ADD. NO. 1 L: 2	IRIS **None**	X

    a. Click the **X** to remove any of the parcel numbers you have added. To remove all of the parcel numbers you have added, click the **Delete All** option.

8. To apply any alias names for subdivisions you have created in IRIS (if the county has enabled IRIS), click either the **County** or **User** option in the **IRIS** section of the subdivision search criteria before you click **Add**.
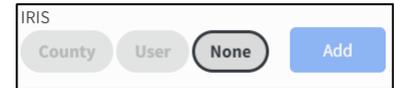

    a. To apply the IRIS feature after you have clicked **Add**, click in the **IRIS** field to change the **None** value to either **County** or **User**.

    b. **NOTE:** All alias subdivision names previously created in the Desktop version of Laredo will be available to utilize in Laredo Anywhere. See page 44 for a full description of **IRIS**.

PARCEL NUMBER

1. To search by parcel ID number, enter the parcel number in the **Parcel** field.
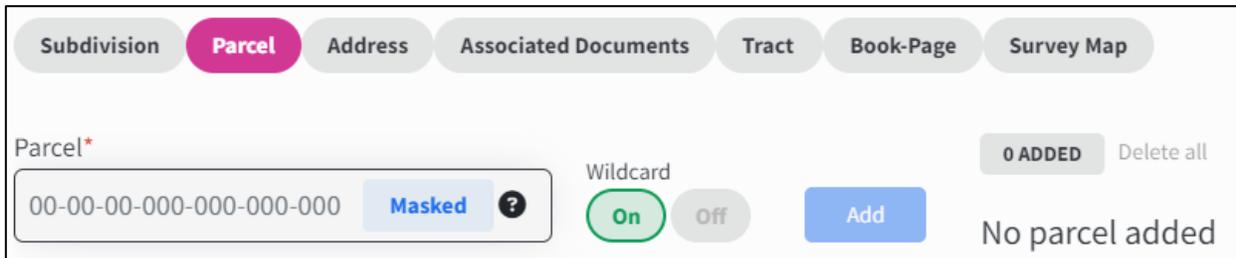
    a. If the county has a standard format for indexing parcel numbers, and has selected the option to auto-display the punctuation for parcel numbers, **Masked** will display on the right side of the **Parcel** field. If **Masked** displays, you will not need to manually enter the appropriate punctuation.

    b. To enter the punctuation of the parcel number manually, click the **Masked** notation to change the notation to **Freeform** then enter the appropriate punctuation along with the parcel number.
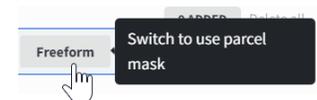
    c. Hover the mouse over the **?** symbol next to **Masked** or **Freeform** to display details about the county's parcel number format.

2. Once the parcel number has been entered in the **Parcel** field, click **Add**.

3. Click **Run** at the top of the search screen to run the search.

ADDITIONAL PARCEL NUMBER SEARCH TIPS

4. With the **Wildcard** option set to **On**, you can enter the first portion of a parcel number and the search will return all documents that match the values entered followed by any additional numbers.

5. To search for multiple parcel numbers in one search, enter each parcel number then click **Add** after entering each one. The search results will return records for all parcel numbers added.

    a. Click the **X** to remove any of the parcel numbers you have added. To remove all of the parcel numbers you have added, click the **Delete All** option.

    b. To turn the **Wildcard** function on after you have added one or more parcel numbers, click the **OFF** option in the **Wildcard** field to change the option to **ON**.

ADDRESS

1. To search by street address, click **Address** in the **Additional Criteria** section then enter the **House Number**, **Street Name/Number**, and **City** in the appropriate fields (the house number and city name are required). You can also enter the **Zip** code if desired.

2. Click **Add**.

3. Click **Run** at the top of the search screen to run the search.

ADDITIONAL ADDRESS SEARCH TIPS

4. If you are uncertain of the exact format the address was indexed, you can enter the wildcard (**%**) before, after, or in the middle of any value you enter in any of the address fields. For example:

    a. If you are uncertain if the street name (or number) was spelled out or abbreviated, you can enter a portion of the street name followed by **%.** (e.g., "123 Main%"; "456 Pat%erson%")

    b. Similarly, you can enter the **%** symbol anywhere in the **City** field if you are uncertain of the spelling of a city name. You can also enter the **%** symbol only in the **City** field if you are uncertain which city may have been indexed.

5. To search for multiple addresses in one search, enter each address then click **Add** after entering each one. The search results will return records for all addresses added.

     a. Click the **X** to remove any of the addresses you have added. To remove all of the addresses you have added, click the **Delete All** option.

6. To apply any alias names for street names you have created in IRIS (if the county has enabled IRIS), click either the **County** or **User** option in the **IRIS** section of the Address search criteria before you click **Add**.

     a. To apply the IRIS feature after you have clicked **Add**, click in the **IRIS** field to change the **None** value to either **County** or **User**.

     b. **NOTE:** All alias **Street Names** previously created in the Desktop version of Laredo will be available to utilize in Laredo Anywhere. See page 44 for a full description of **IRIS**.

ASSOCIATED DOCUMENTS

1. To search by associated document number, click **Associated Documents** in the **Additional Criteria** section, enter the document number that was indexed as an associated (related) document number.

2. Click **Add**.

3. Click **Run** at the top of the search screen to run the search.

ADDITIONAL ASSOCIATED DOCUMENT SEARCH TIPS

4. If you only know the book and page values of the associated document number, and these values have been indexed, enter the book number in the **Book/Libre** field and the page number in the **Page** field then click **Add**.

5. To search for multiple associated document numbers in one search, enter each number then click **Add** after entering each one. The search results will return records for all associated document numbers added.

     a. Click the **X** to remove any of the associated document numbers you have added. To remove all of the associated document numbers you have added, click the **Delete All** option.

TRACT

1. To search by tract (unplatted land), click **Tract** in the **Additional Criteria** section.

2. Enter the appropriate values in the **Section**, **Township**, and **Range** fields (and **Gov't Lot** field, if applicable).

     a. **NOTE**: If a county indexes the directionals ("N", "S", "E", "W") along with the numeric values in the **Township** and **Range** fields, you can enter those directional values after the numbers in these fields.

3. To narrow your search to a particular quarter section, click the desired **Quarter** section.

4. If you wish to narrow the search to two quarter sections, click the desired **Quarter** section then click the **Quarter Quarter** section.

    NOTE: The **Quarter Quarter** field does not display unless you select a value in the **Quarter** field.

5. To select a half section, click the two quarter sections that constitute the half section.

6. If you select two quarter sections, you can add a third quarter section by clicking the **Reveal Quarter Quarter Quarter** bar and clicking on the third quarter section.
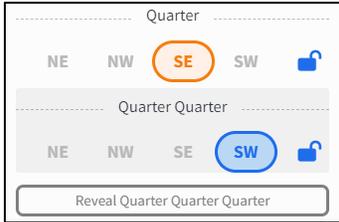
NOTE: Many counties do not index the Quarter-Quarter-Quarter values so it is typically recommended to NOT select a third quarter value.

7. When all values have been entered and selected, click **Add**.

8. Click **Run** at the top of the search screen to run the search.

ADDITIONAL TRACT SEARCH TIPS

9. To search for multiple tract values in one search, enter and select each value then click **Add** after entering each one. The search results will return records for all tract values added.

a.   Click the **X** to remove any of the tract values you have added. To remove all of the tract values you have added, click the **Delete All** option.

BOOK-PAGE (LOCATION)

1. To search by book and page (or liber and page or volume and page) values, click **Book-Page** (or **Location**) in the **Additional Criteria** section then enter the appropriate values in the **Book** and **Page** fields.

2. Click **Add**.

3. Click **Run** at the top of the search screen to run the search.
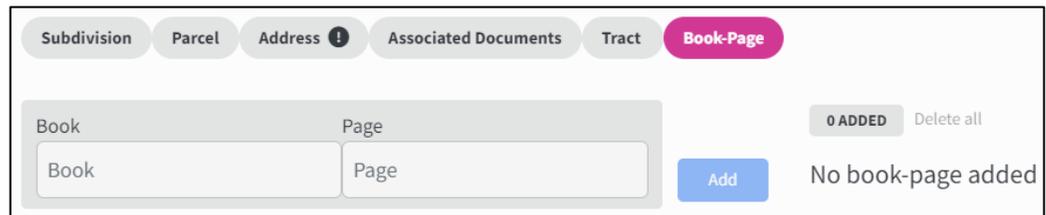
ADDITIONAL BOOK-PAGE SEARCH TIPS

4. If you are uncertain if the county utilizes prefixes, leading zeros, or suffixes in the book or page fields, you can enter the wildcard (**%**) in any place in the book and page fields. For example:

    a. Enter "%871" in the Book field to search for possible book numbers "0871", "MG871", etc.

    b. Enter "%10" in the Page field to search for possible page numbers "10", "010", etc.

    c. Enter % at the end of any value in the Book or Page field, such as "100%" in the Page field.

5. You can also search for an entire book by entering the book number in the **Book** field then just the wildcard (**%**) in the **Page** field.

6. To search for multiple Book-Page values in one search, enter each value then click **Add** after entering each one.

| 2 ADDED	Delete all	
1. **B: 101 | P: 1**		✕
2. **B: 101 | P: 10**		✕

The search results will return records for all book-page values added.

   a. Click the **X** to remove any of the book-page values you have added. To remove all of the book-page values you have added, click the **Delete All** option.

CERTIFIED SURVEY MAP (CSM)

1. To search by certified survey map (CSM) or municipality, click **Survey Map** in the **Additional Criteria** section.

   NOTE: Not every state utilizes this field for indexing (most Wisconsin Registers of Deeds index the CSMs in this field). Also, some states utilize this field for indexing municipalities or townships.

2. To select a CSM, click in the **CSM List** (**Select a CSM**) field; a list of CSMs will display. You can either scroll down the list of CSM names with the mouse wheel or **Down Arrow** on the keyboard then select the desired CSM or you can filter the list by typing a few letters of the desired CSM name in the search field; a list will display all CSMs that match the characters entered.

   a. To select the CSM by the CSM short code, click the **Use Long Codes** toggle to change the option to **Use Short Codes**.

      The CSMs will then be listed in the **Name** field by short code.

   b. **NOTE:** In counties that index municipality or township (or similar) names in the CSM field, the **CSM List** will display municipality, township, etc. names that have been indexed.

3. Select the correct CSM name.

4. If you wish to narrow your search to a particular **Lot** and/or **Outlot** value, enter the values in these fields.

5. Click **Add**.

6. Click **Run** at the top of the search screen to run the search.

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ADDITIONAL CSM SEARCH TIPS

7. To search for multiple CSM names (or multiple Lots and/or Outlots) in one search, enter each CSM value then click **Add** after entering each one. The search results will return records for all CSM values added.
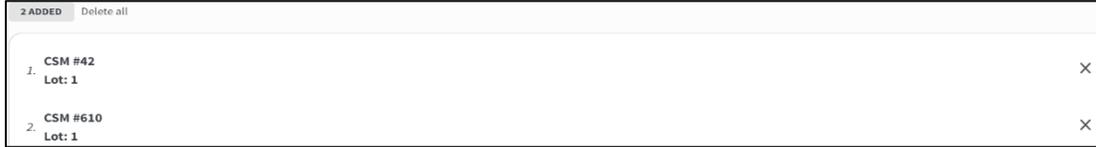
   a. Click the **X** to remove any of the CSM values you have added. To remove all of the CSM values you have added, click the **Delete All** option

SEARCH RESULTS – THE BASICS

The search results grid that displays when a search is run will initially display a summary of the index data for the documents that match the search criteria entered. (**NOTE:** The search results rows and columns may display in a different arrangement than is shown in the image above in the county in which you are searching. See the **TEMPLATES** section later in this manual for details on customizing your search results display.)

When a search has been run, the number of results returned will display in the upper left corner of the search results grid.


1. To view more columns to the right on the screen, click and drag the **scroll bar** at the bottom of the results grid (identified by the green arrow in the image above). You can also scroll down the page by dragging the **scroll bar** along the right side of the grid or utilizing the **scroll wheel** on your mouse.

2. To scroll through each page of results one page at a time, click the **Page Arrow** at the bottom of the grid (identified by the blue arrow in the image above). Click the **Double Page Arrow** to navigate to the last or first page of results.

3. To **view the index data** details for any document, click anywhere on the document's row in the results grid. All index data for the document will display in the **Doc Info** panel on the left side of the results grid.

NOTE: The row for any document result that has been clicked will be highlighted to notify you that you have viewed the details of the particular document.

4. Click and drag the **scroll bar** on the right side of this panel (or roll the mouse wheel) to view additional data.

5. To navigate to the document index data for the previous or next document in the search results, click the **Left** or **Right Arrow** in the **Navigation** box at the bottom of the **Doc Info** panel.

a. You can also scroll through the search results rows by clicking on a row then pressing the **Down** or **Up Arrow** on the keyboard to highlight rows below or above the selected row and display the **Doc Info** panel for each highlighted row.

6. Click the **X** in the upper right corner of the **Doc Info** panel to close the panel and display the **Criteria** panel.

7. To **view a document image**, double click anywhere on the document's row in the results grid.
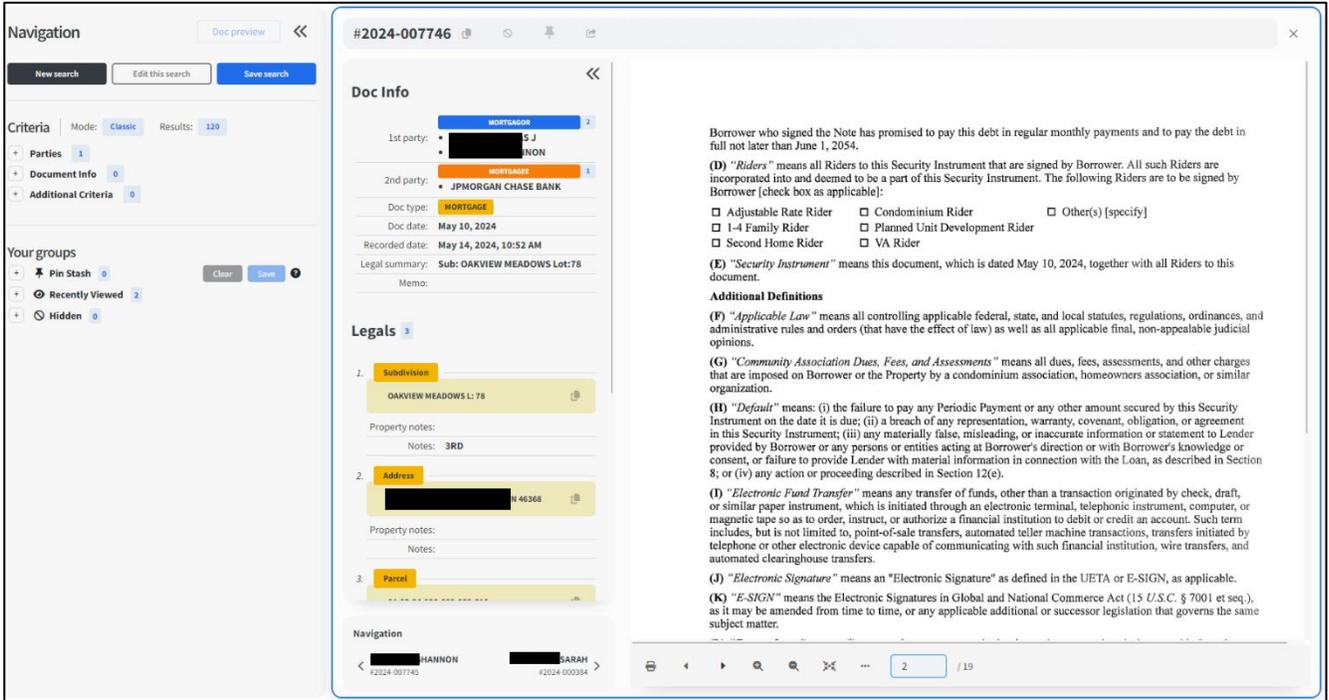

The **Navigation** and **Doc Info** (document index details) panels will display on the left side of the screen and the image will display on the right.

8. Click the **Right** or **Left Arrow** at the bottom of the image to scroll through the pages.


9. To print the image, click the **print** icon at the bottom of the image. The **Print Option** dialogue box will display:
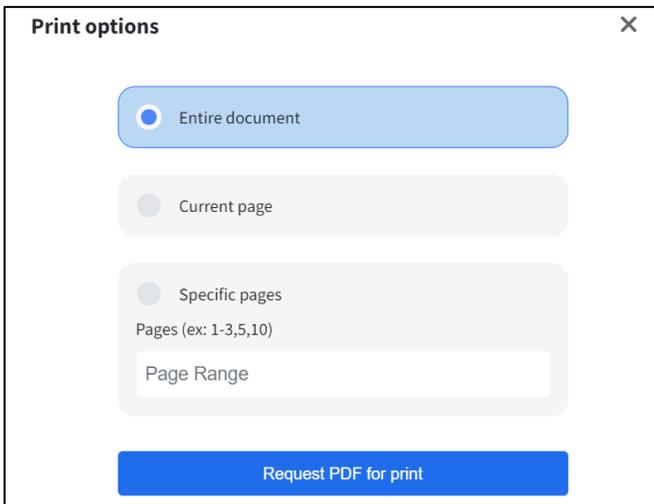
a. Click **Entire document** or **Current page** or click the **Specific pages** option then enter the page, pages, or page range you wish to print.

b. Click **Request PDF for print**. A print dialogue box will display. The specific print dialogue box that opens will be determined by the web browser in which you are running Laredo Anywhere.

c. Print the image(s) utilizing the functionality of the print dialogue box in which the image displays.

10. To close the image, click the **X** in the upper right corner of the image or press the **ESC** key.

11. To view the criteria entered for the search in the **Criteria** panel (if the image is not displaying, you may need to close the **Doc Info** panel to view the **Criteria** panel), click the (**+**) symbol next to **Parties**, **Document Info**, and/or **Additional Criteria**.
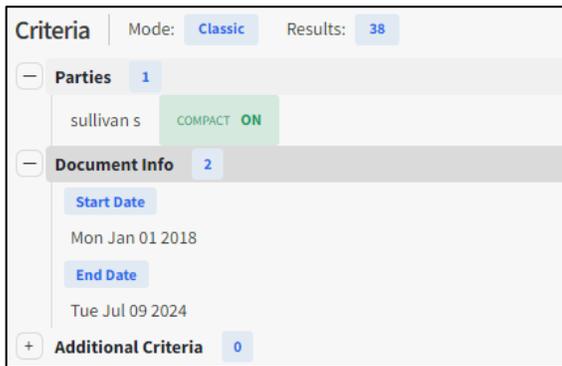
12. To increase the number of rows that display per page (the default number of rows per page is 50), click the **Blue Square** in the **Rows per page** field at the top of the results grid and drag the square to the right until the desired number of rows displays in the green box.


13. To reset the number of rows per page back to 50, click the **Reverse Arrow**.

    NOTE: Increasing the number of rows to a large number may result in slower loading times.

    The Laredo Anywhere search results will "remember" the number of rows you set in this field for all subsequent searches unless you set up a unique template with a different number. See the **TEMPLATES** section on page 40 of this manual for details on setting up search templates.

14. To run a new search, click the **New search** bar in the **Navigation** panel. (**NOTE:** If the **Doc Info** panel is open, you will need to first click the **X** in the upper right corner of the **Doc Info** panel to display the **Criteria** panel.)
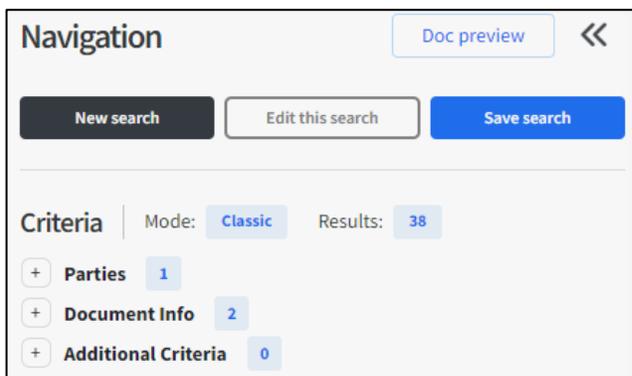

When **New Search** is clicked you will return to the search criteria screen. All existing criteria will be cleared and you can run a new search.

15. To return to the search criteria screen to modify the existing search criteria, click the **Edit this search** bar in the **Navigation** panel. You will return to the search criteria screen with all existing criteria still in the fields.

    NOTE: See page 33 for a description of the **Save search** function and page 31 for a description of the **Doc preview** function.

See **SEARCH RESULTS – DETAILS** on the next page for more details on viewing images and data in the search results.

SEARCH RESULTS – DETAILS


IMAGE & PRINT CONTROLS

An image icon will display on the left side of any search results row if the document has an image.

1. To **view a document image**, double click anywhere on a document row.

    a. You can also view the image by right clicking on the document row in the results grid then clicking **View**.

    b. The image icon will display a blue eye symbol when an image has been viewed.


    The **Navigation** and **Doc Info** (document index details) panels will display on the left side of the screen and the image will display on the right.


2. To view the image in a larger view, click the double **Arrow** in the **Doc Info** panel to collapse this panel. A small shortcut icon panel will display in the upper left corner of the image window.

a. To reopen the **Doc Info** panel, click the small double **Arrow** in the icon panel in the upper left corner of the image window.

Previous Image

Next Image

b. To view the image of the previous or next document in the search results, click the **Previous image** or **Next image** icon in this panel.
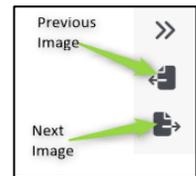
3. To print the image, click the **print** icon at the bottom of the image. See page 20 above for more details regarding printing images.

4. The following **image controls** are available at the bottom of the image:

Print Image   Previous Page   Next Page   Zoom Image   Shrink Image   Resize Image   More Controls   Go To Page
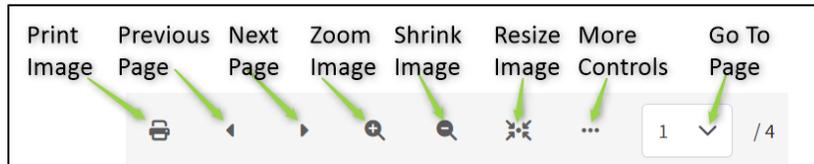
a. To navigate to a particular page of the document, either click the **Up** or **Down Arrow** in the "Go To Page" field or click after the page number in the field, backspace over the displayed number then type the page you wish to navigate to.

b. Click the **More Controls** option to display the following additional image controls:

Go To 1st Page   Go To Last Page   Rotate Page   Hide More Controls
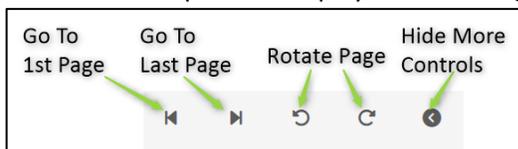
5. The following **Controls** are available in the toolbar in the upper left corner above the image:

#1096670

Copy Doc #   Hide Document   Toggle Pinned   Open Doc in new window

a. **Copy Doc #**: Click the **Copy document number** icon to copy the document number in order to paste it into any notes you may be taking on your computer or to paste it into the document number field for a new search.

b. **Hide Document**: Click the **Hide document** icon to hide this document number from the search results grid once you close the image.

   i. You can also hide a document from the search results grid by right clicking on the document row then clicking **Hide**.

c. **Toggle Pinned**: See the **PIN DOCUMENTS** section on page 34 of this manual for a description of this feature.

d. **Open Doc in new window**: Click the **Open document in new window** icon to open the current image in a new window on your computer. This feature will allow you to view the image in a separate browser window so you can carry out other functions in Laredo with the image still open in another window. Also, if you utilize multiple monitors, you can drag the image to another monitor or tile the image with other images if your monitor allows for this functionality.

   NOTE: This can be repeated multiple times if you wish to have multiple document images open at the same time.

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6. To view the **image** and **Doc info** panel (if it has not been closed already) **full-screen**, click the double **Arrow** in the upper right corner of the **Navigation** panel. The shortcut bar showing below will display.
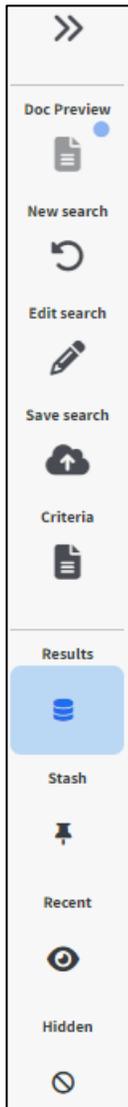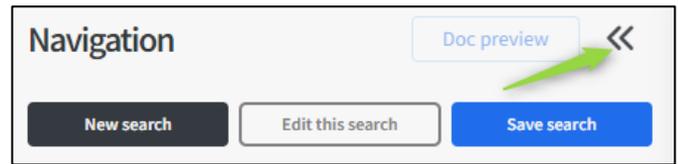
The following function icons in this shortcut bar are available when viewing the image full-screen:

a. Click the **Expand Panel Arrow** icon at the top of the bar to display the **Navigation** panel.

b. Click **New search** to close the image and return to the search criteria screen to run a new search.

c. Click **Edit search** to close the image and return to the search criteria screen with the original criteria still listed.

d. **Save search**: See page 33 for a description of the **Save search** function.

e. Click **Criteria** to display a dropdown box in which the criteria entered for the search will display.

The rest of the function icons showing in this shortcut bar are disabled when viewing an image full-screen. See the **MODIFYING & PRINTING SEARCH RESULTS** on page 27 for a description of these additional function icons.

VIEWING ASSOCIATED (RELATED) DOCUMENT IMAGE

If a document in the search results has an associated document number listed in the **Associated Doc** column of the search results, you can view the image of the associated document without running a separate search for this document.

| #	Doc Number ↑↓	Additional Party ↑↓		Doc Type ↑↓	Recorded Date ↑↓	Assoc Doc ↑↓
🖼	29	2020007206	FIRST FEDERAL SAVINGS BANK ▸FROM	PARTIAL RELEASE OF MORTGAGE	Feb 4, 2020, 5:02 PM	2019008291 MG

1. To view the image of an associated document, click anywhere on the row in which the associated document is listed in the **Associated Doc** column. The **Doc Info** panel will display on the left side of the search results grid.

2. Double click the document number in the **Associated docs:** section of the **Doc Info** panel (identified by the green arrow in the image on the left). The image of the associated document will display in an **Associated Document Image** window (see the image on the next page).

3. If there are multiple associated documents listed in the **Assoc Doc** column, **Multi Assoc Doc** will be listed in the **Assoc Doc** column of the search results grid. To view the list of associated document numbers, click anywhere on the row.

a. All of the associated document numbers will be listed in the **Associated docs:** section of the **Doc Info** panel that displays.


b. Any associated document number for which there is an image available will display an image icon next to the number.

4. Double click on any associated document number to view the image of that document; the image will display in the **Associated Document Image** window shown on the next page.
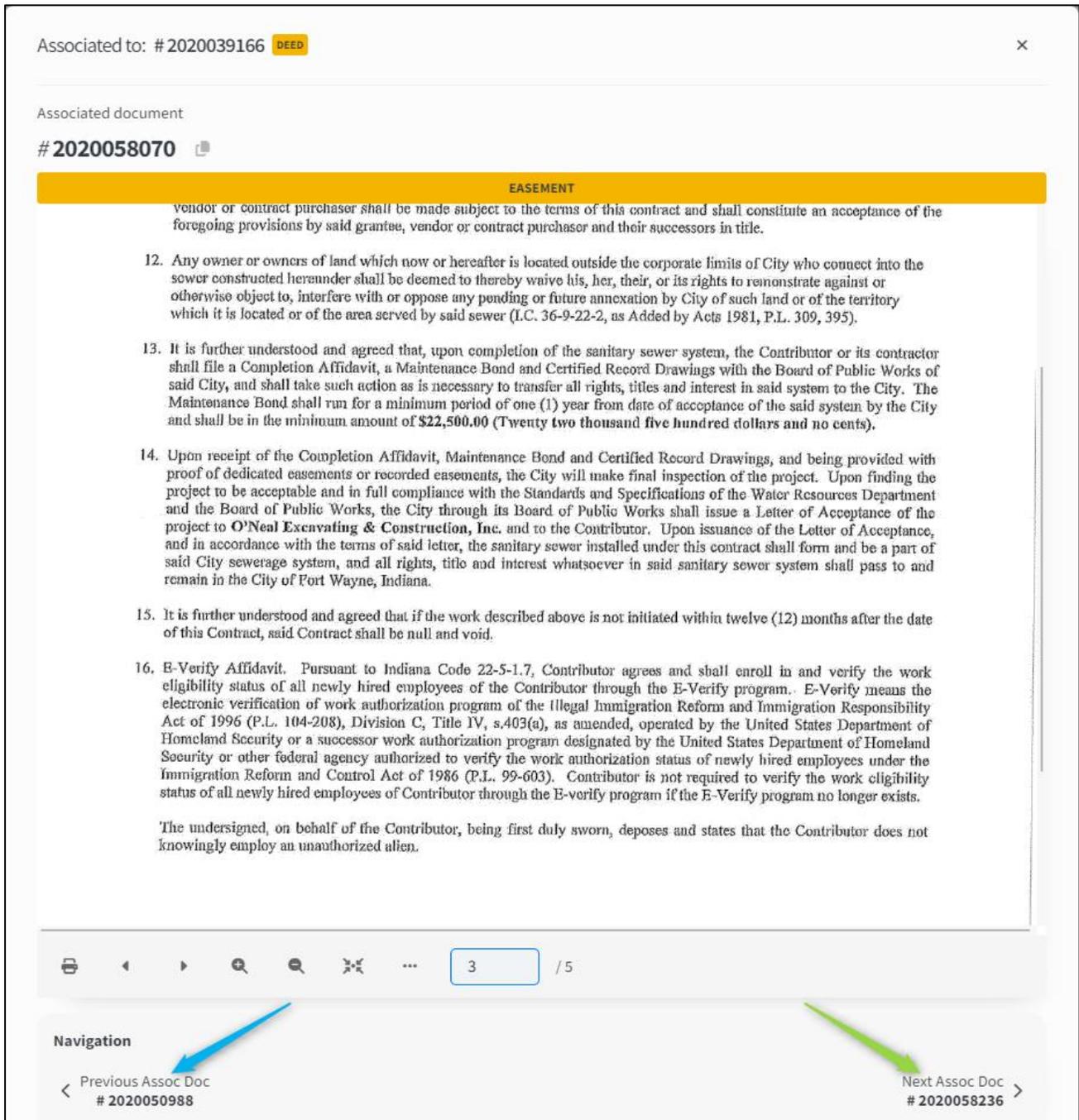
5. See page 23 above for a description of the image navigation bar at the bottom of the image.

6. If there are multiple associated documents listed in the **Associated docs:** section of the **Doc Info** panel, click the **Next Assoc Doc** option (identified by the green arrow in the image above) in the lower right corner of the image window to display the image of the next associated document in the list. Click the **Previous Assoc Doc** option (identified by the blue arrow in the image above) in the lower left corner of the image window to display the image of the previous associated document (if there is one) in the list.

7. Click the **X** in the upper right corner of the image window (or press the **Esc** key) to close the image of the associated document.

MODIFYING & PRINTING SEARCH RESULTS

VIEWING SEARCH RESULTS FULL-SCREEN
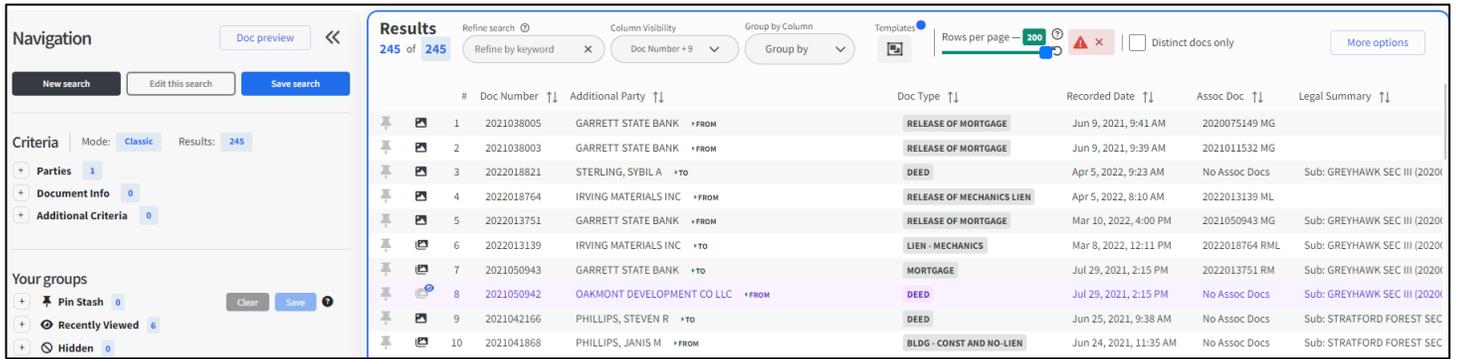
1. To view the **search results** grid **full-screen**, click the double **Arrow** in the upper right corner of the **Navigation** panel.

   a. The **Navigation** panel will close and the shortcut bar shown on page ??? will display along the left side of the screen. See page 24 for a description of the shortcut icons in the upper portion of the shortcut bar.

   b. See the **NAVIGATION PANEL – MORE DETAILS** section on page 32 and the **PIN DOCUMENTS** section on page 34 for a description of the **Results, Stash**, **Recent**, and **Hidden** functions.

2. To **Print** the **search results**, click the **More options** button in the upper right corner of the print results then click **Results to PDF** (identified by the green arrow in the image on the right). A PDF document displaying the search results will download in your web browser.

   NOTE: The printed results will display essentially what is seen on the screen so make sure to order and group the rows and columns on the screen as you wish (and hide any rows you do not wish to display in the print) to view them in the results that are printed. See the sections below for details of these functions.

3. To print a detailed report of the documents in the search results, click the **More options** button then click **Details to PDF** (identified by the blue arrow in the image on the right). A PDF document displaying the search results details will download in your web browser.
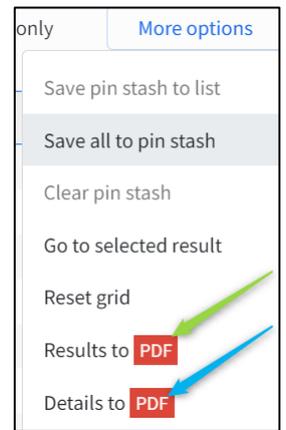
COLUMN SORT

1. To sort by any column in the search results, click the **column header** for that column. The blue arrow will point up to identify that the column is sorted in ascending order. To reverse the sort order, click the column header again – the arrow will point down.

2. To sort by multiple columns, click the header of the first column you wish to sort by, press and hold the **CTRL** key on the keyboard then click the header of the second column you wish to sort by. You can repeat this process to sort by more than two columns. If you sort by more than one column, the order the columns in which the columns are sorted will be identified by a number in a blue circle in the column header.
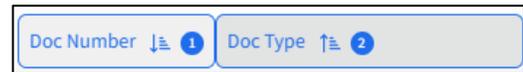
COLUMN ORDER

1. Laredo Anywhere allows a user to order the results columns in any order. To reorder the display of the columns, click and hold any **column header** (e.g., "Party One," "Assoc Doc," "Doc Type", etc.) then drag the column to the desired location. When you see the **double arrows** positioned in the correct placement, release the mouse.

2. You can move as many columns as you wish. When a new search is executed, the columns will return to the default display order.
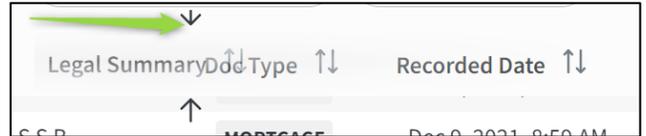
See the section titled **TEMPLATES** section on page ??? of this manual for a detailed description of how to set up customized templates for your search results.

COLUMN VISIBILITY & RESIZE

1. To remove (**hide**) columns from the Search Results grid, click the **Column Visibility** dropdown arrow.

2. Uncheck any column in the list that you do not wish to display in the search results grid then click the **X** at the top of the list to close the visibility box.

3. You can also hide a column from view in the search results by right clicking on the column header then clicking the **Hide** option.

   NOTE: The unchecked columns will only be hidden from view for the current search. If you run another search (a new search or an edited search), the unchecked columns will display again. See the section titled **TEMPLATES** on page 40 of this manual for a detailed description of how to set up customized templates for your search results in which you can permanently hide unwanted columns.
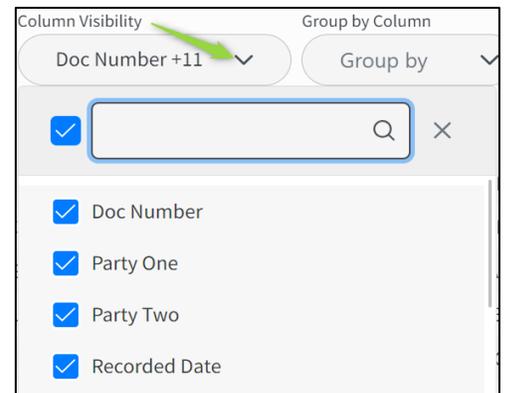
4. To **resize** the width of a column, hover the mouse between two columns, click and drag the two-sided arrow left or right until the column is at the desired width.

   NOTE: If you adjust any of the search results utilizing the **Column Visibility** function or any other function noted below, you can reset the results to the original view by clicking **More options** in the upper right corner of the results grid then clicking **Reset grid**.
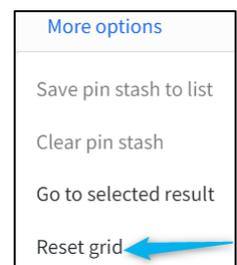
GROUP BY COLUMN

1. To group search results by any index field column, click the **Group by Column** dropdown arrow.

Group by Column

Group by ▼

Doc Number

Party One

Party Two

Recorded Date
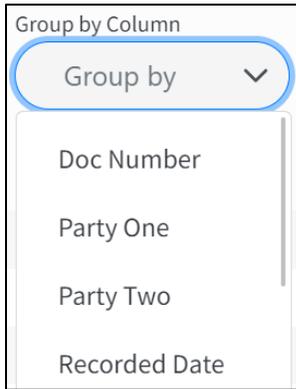
2. Click the column name by which you would like to group the search results. The results will then display one row for each unique value of the column name you clicked. (See the image below.)

a. You can also group the results by a particular column by right clicking the column header then clicking the **Group by** option.

The image on the right displays the first few rows of search results grouped by **document type**. The blue box next to each document type displays the number of documents in each grouping.

#	Doc Number ↑↓	Party One ↑↓	Party Two ↑↓
>	AGREEMENT	**1** distinct doc(s)	
>	AMENDMENT	**2** distinct doc(s)	
>	ASSIGNMENT	**4** distinct doc(s)	
>	DEED	**5** distinct doc(s)	

3. To view the list of documents in any group, click the **Arrow** to the left of that group name. The image below displays the four documents in the "ASSIGNMENT" document type group.

▼		ASSIGNMENT	**4** distinct doc(s)	
📌	🖼	4	1097043	⬛COLLEEN
📌	🖼	5	1097050	MORTGAGE ELECTRONIC REGISTRATION SYSTEMS I
📌	🖼	6	1097051	MORTGAGE ELECTRONIC REGISTRATION SYSTEMS I
📌	🖼	7	1097062	QUICKEN LOANS INC

4. In the rows of documents under any grouping, click any row to view the index data details of any document in the **Doc Info** panel and double click any row to view the **image** of any document.

5. To collapse the list of documents under any grouping, click the **Arrow** to the left of the group name.

6. To reset the search results to the ungrouped view, click the **X** in the **Group by Column** field.

Group by Column

Doc Type ✕ ▼
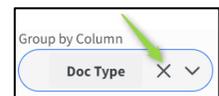
DISTINCT DOCUMENTS

When a search by any criteria other than a Party Name is done in Laredo Anywhere, the search results will display one row per party name, resulting in most documents displaying in multiple rows.

☐ Distinct docs only

1. To remove the duplicate rows and display only one row per document in the results, click the **Distinct docs only** checkbox located on the right side of the top toolbar.

   The search results will then display only one row per document. You can still click any document's row to view the index data details in the left panel and double click any document row to view the image.

   Results 191 results / **79 showing**

   When **Distinct docs only** is checked, the number of resulting rows that now display ("showing") will be listed in the **green box** in the **Results** field in the upper right portion of the results grid along with the original number of results listed above this number.

REFINE SEARCH BY KEYWORD

Refine search ⓘ
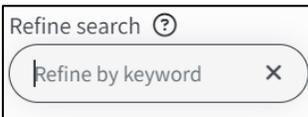
Refine by keyword ✕

1. To identify documents in the search results that contain a particular description (party name, document type, legal description, etc.) that is listed in the search results, click in the **Refine by keyword** field in the **Refine search** field in the toolbar at the top of the results grid.

2. Enter any letters, words or numbers, or word phrases for which you would like to search in the results. The results will then display only the records that contain those words. For example, the image below displays the documents that contain any subdivision in the legal summary column that contains the word "Pheasant".
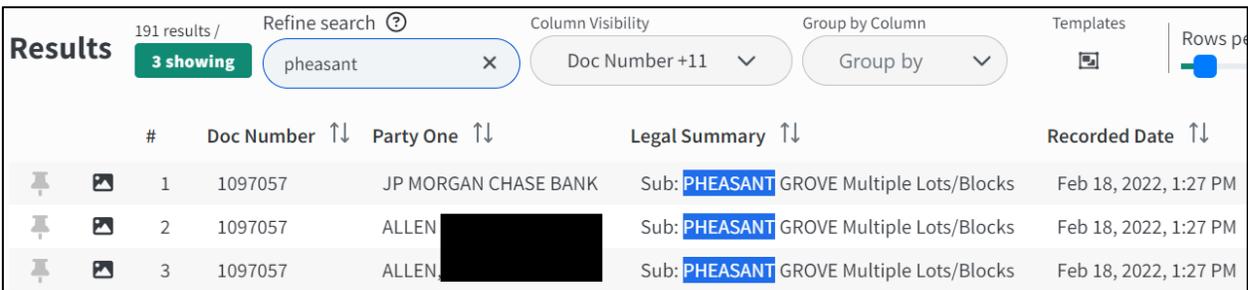
		#	Doc Number ⇅	Party One ⇅	Legal Summary ⇅	Recorded Date ⇅
		1	1097057	JP MORGAN CHASE BANK	Sub: PHEASANT GROVE Multiple Lots/Blocks	Feb 18, 2022, 1:27 PM
		2	1097057	ALLEN ████	Sub: PHEASANT GROVE Multiple Lots/Blocks	Feb 18, 2022, 1:27 PM
		3	1097057	ALLEN, ███	Sub: PHEASANT GROVE Multiple Lots/Blocks	Feb 18, 2022, 1:27 PM

Results — 191 results / 3 showing; Refine search: pheasant; Column Visibility: Doc Number +11; Group by Column: Group by; Templates; Rows pe...

3. The **Results** section will display the number of rows showing in the **green box**.

4. To return to the original search results, click the **X** in the **Refine search** field.

   NOTE: The **Refine search** function will only identify records in the search results in which the entered word(s) are listed in the actual results grid. For example, if a record includes index data for a particular legal description, but only "Multiple Legals" is listed in the Legal Summary column (in which case you would need to click the row to view the details of the index data in the left panel), the document would not display in the results grid if you entered that specific legal description in the **Refine search** field.

DOC INFO PANEL – MORE DETAILS

The **Doc Info** panel will display on the left side of the search results grid when any row in the results is clicked.

1. To copy any Legal description to the computer clipboard to paste into notes you may be taking on your computer, click the **Copy legal** option on the right side of any legal description in the **Doc Info** panel.
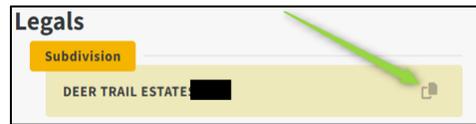
2. If you do not wish to view the **Doc Info** panel each time you click a row in the results grid, click the **Show: On** toggle slide to turn this feature off then click the **X** next to the toggle slide to close the **Doc Info** panel.

With the toggle set to **Show: Off**, the **Doc Info** panel will not display when a row is selected in the search results grid until a new search is run.

3. To reactivate the **Doc Info** panel, click the **Doc preview** option at the top of the **Criteria** panel then click the **Show: Off** toggle slide to reactivate the **Doc Info** panel.


NOTE: With the **Show: On** toggle set to the **Show: Off** position, results rows that are clicked will not highlight.

4. Click the **X** in the upper right corner of the **Doc Info** panel to close the panel and return to the **Navigation** panel.

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NAVIGATION PANEL – MORE DETAILS

The **Navigation** panel on the left side of the search results will display such information as the number of results returned, the criteria that was entered for a search, and other information. In the **Your groups** section in the lower portion of the **Navigation** panel includes the following information:

1. **Pin Stash**: See the **PIN STASH** section on page ??? for details regarding the pin stash.

2. **Recently Viewed**: The document number, document type, and recording date of all documents that have been viewed (the **image** and/or **Doc Info**) will be listed in the **Recently Viewed** section.
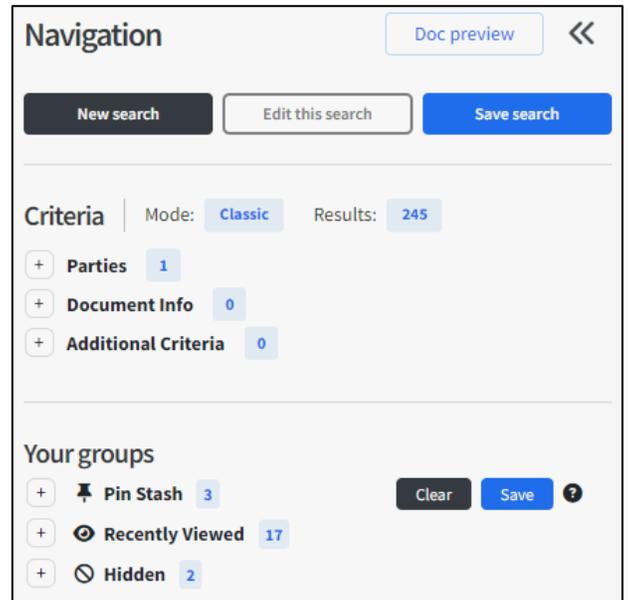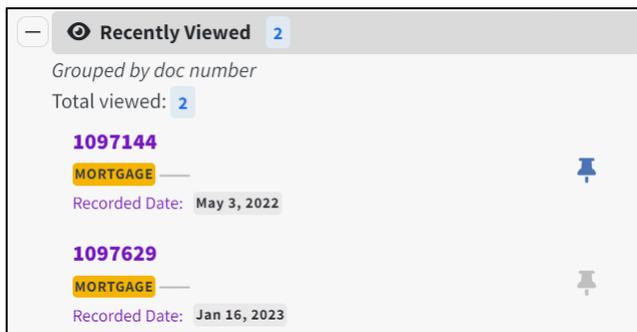
a. To view these recently viewed documents, click the (**+**) symbol next to **Recently Viewed**.

b. Click any document number in this list to view the image and index data for the document.

c. Click the **pushpin** to pin the listed document. (See the **PIN DOCUMENTS** section on page 34 for details regarding the pin stash.)

3. The document number, document type, and recording date of all documents that have been hidden from the results grid will be listed in the **Hidden** section of the **Criteria** panel. (See page 23 for details on hiding documents listed in the search results.)

a. To view these hidden documents, click the (**+**) symbol next to **Hidden**.

1. Click any document number in this list to view the image and index data for the document.

2. Click the **Circular Arrow** in the lower right corner of the **Hidden** window to unhide the document from the search results grid.

SAVE SEARCH

Once a search has been run, you can save this search to easily re-run the search at a later time from the **Saved Searches** section of Laredo Anywhere (see page 42). You also have the option to be notified by email and/or text (if the county allows for this) if a document is recorded in the future with index data that matches the criteria you searched on.

1. To save a search, with the search results displaying, click the **Save search** button in the **Navigation** panel on the left side of the search results. The window shown below will display.
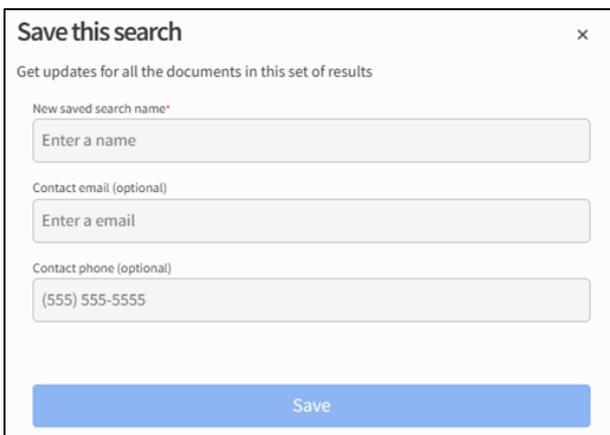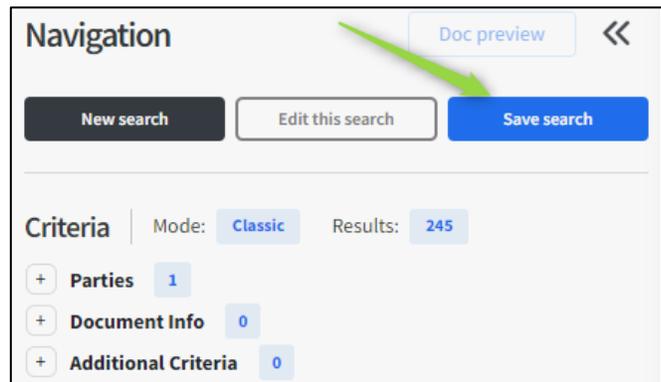
2. Enter a description of the saved search in the **New saved search name** field.

3. If you would like to be notified by email if a document is recorded in the future (typically within 90 days of when the search is saved) with index data that matches the criteria you searched on, enter your email address in the **Contact email (optional)** field.

4. If you would like to be notified by text if a document is recorded in the future (typically within 90 days of when the search is saved) with index data that matches the criteria you searched on, enter your phone number in the **Contact phone (optional)** field.

NOTE: The **Contact email (optional)** and **Contact phone (optional)** fields may be deactivated in your county.

5. Click **Save**.

NOTE: If you entered your email and/or phone in the **Save this search** box, and you get a notification that a document has been recorded with index data that matches the criteria you searched on, you can quickly re-run the search to view updated records in the **Saved Searches** section of Laredo Anywhere. See page 42 later in this manual for a description of this section of Laredo Anywhere.

SEARCH RESULTS – MORE OPTIONS

Additional functions are available in the search results screen utilizing the **More options** button in the upper right corner of the search results screen.
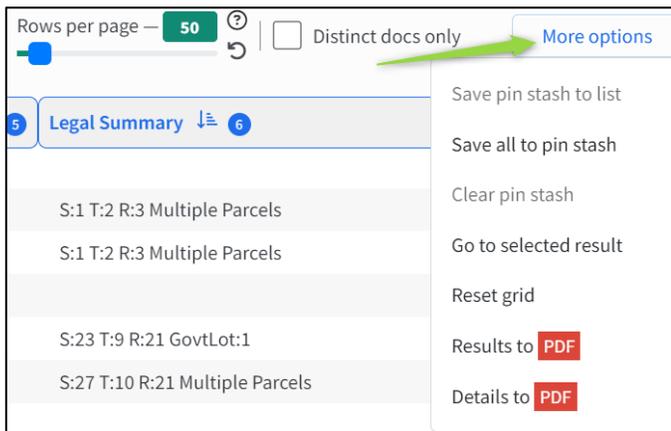
1. **Save pin stash to list**: Click this option to save your current pin stash to an existing pin list.

NOTE: This function can also be done from the **Navigation** panel. See the **PIN DOCUMENTS** section on page 34 for details of this process.

2. **Save all to pin stash:** Click this option to save all documents in the search results to an existing pin list.

3. **Clear pin stash**: To remove all documents from your pin stash, click this option.

4. **Go to selected result**: If you have highlighted a document row in the search results then scrolled the results or navigated to a different page of the results and left that row highlighted, click this option to return the results grid to the highlighted row.

5. **Reset grid**: If you have modified the search results in one of the following ways:

    a. Reordered columns

    b. Hidden columns utilizing the **Column Visibility** function

    c. Modified the **Rows per page**

    d. Checked the **Distinct docs only** option

    e. Utilized the **Refine by keyword** function

    f. Hidden the **Doc Info** panel utilizing the **Show: On** toggle

    Click **Reset grid** to return the results to the view that displayed when the search was first run. The results will also return to the first page.

    NOTE: The **Reset grid** function will NOT reset the **Group by Column** function.

6. **Results to PDF:** Click this option to print the search results. See page 20 for details on this function.

7. **Details to PDF**: Click this option to print a detailed report of the search results. See page 20 for details on this function.

PIN DOCUMENTS

PINNING DOCUMENTS

Laredo Anywhere includes the functionality to "Pin" documents in the search results. This function is useful in the following ways:

- The index data (**Doc Info**) and images of pinned documents can be easily viewed from the **Pin Stash** section of the **Navigation** panel during the current search session.

- Pinned documents can be saved to a library for viewing later.

1. To pin documents and save them in the **Pin Stash**, click the **Blue Pin** on the left side of the document row in the search results grid. You can pin multiple documents in the results.

   a. You can also pin a document by right clicking on the document row in the search results grid then clicking **Stash** in the list that displays.
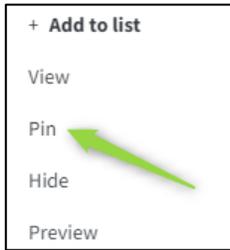
   b. To unpin a document that has been pinned in the search results, click the **blue pin** in the results grid to unpin the document. You can also unpin a pinned document by right clicking anywhere on the pinned document in the results grid then clicking **Unpin** (the "Pin" option changes to "Unpin" for any pinned document.

   The pinned documents will display in the **Pin Stash** section of the **Navigation** panel.

2. To view the pinned documents, click the **(+)** symbol on the left side of the pin stash section. The pinned documents will display in a list that includes the document number, document type, and recording date.

3. To view the image and document details of any pinned document, click the document number in the list. The **image** and **Doc Info** window will open.

4. To remove a document from the pinned list in the **Criteria** panel, click the **blue pin** to the right of the document.

   a. To remove all documents from the pin list at one time, click the **Clear** button at the top of the Pin Stash list.

   b. You can also remove all documents from the Pin Stash list by clicking the **More options** button in the right corner of the top toolbar of the search results grid then clicking **Clear pin stash**.

5. To save the pinned documents to a library list, click the **Save** button in the Pin Stash section of the **Navigation** panel. A screen similar to one shown below will display.
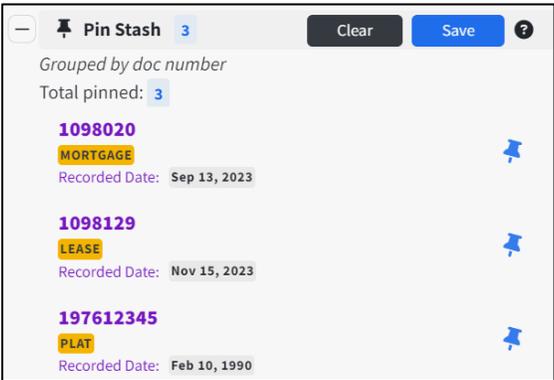
Add documents to pinned list   ✕

Adding documents from Pin Stash
1098046   1098006   1097978

○ Select a pinned list for these documents
   [Choose a pinned list   ⌄]

○ Add to new list name
   [Enter a new list name   ]

Notes
[Add optional notes

]

[Add]

6.   If you have previously-saved pin lists and you would like to add these documents to an existing list, click in the **Choose a pinned list** field then select the correct list name from the list that displays. You can also start typing a previously-created list name in the field to display matching existing list names then select the name.

7.   Once you have selected a list name, click in the **Notes** field and enter any notes to help in identifying or describing this pin list. These notes will display in the Laredo Anywhere Library along with the pin list. See the next page for details about the library.

8.   Click the **Add** bar.

9.   To create a new pin list in which to add the pinned documents, click in the **Enter a new list name** field, type the name of the new list then add any relevant **Notes** for the new list.

10. You can also add a document to a pin list by right clicking the document row in the search results then clicking **Add to list** in the list that displays.

   a.   The **Add documents to pinned list** screen shown above will display. Follow the instructions in steps 6-9 above to add the document to an existing or new pin list.

+ **Add to list**
View
Unpin
Hide
Preview

LIBRARY (FOR PINNED DOCUMENTS)

The Laredo Anywhere **Library** provides a location in which to access and manage your pinned documents and to create new pin lists.

**𝐿** — gregs777 —   🏠 Dashboard ||| Library   🔍 Search   ⚙ Settings

1.   To access the pin documents library, click **Library** at the top of the Laredo Anywhere window. A window similar to the one shown below will display:

Library

Your counties «	Your Library Last modified > Pinned Lists [Edit]						Create new list [Find an item ✕]
[Search counties ✕]	Name ↑↓	State ↑↓	County ↑↓	Username ↑↓	Documents ↑↓	Description ↑↓	Show Archived
Your Library	G Sullivan List	IN	Porter County	@inporter	3		🗄
Howard County @inhoward IN 0 lists	Wilson 02-9-24	OH	Wood County	@ohwood	2	For closing	🗄
Marion County @inmarion IN 0 lists	wilson closing	OH	Wood County	@ohwood	4		🗄

2.   To search for a particular pin list, begin typing the pin list name in the **Find an item** field. The matching pin list(s) will display.

3. To view a pin list, double click the list name in the **Name** column. The documents in that list will display.
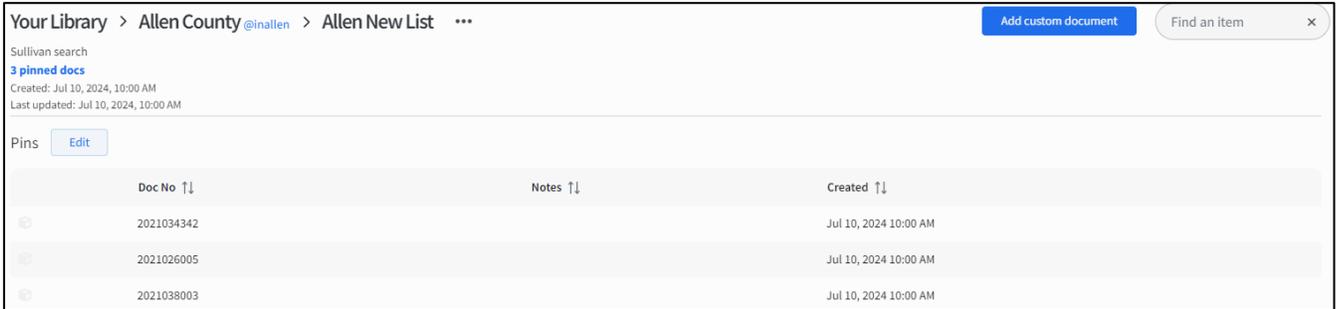
a. **NOTE:** Any time spent accessing documents in **Your Library** counts against your Laredo subscription minutes.

4. To view the document details and image of any document in the pin list, double click the document number. The **image** and **Doc Info** window will display within the library screen. Click the **X** in the upper right corner of the image to close the image and Doc Info window and return to the pin list.

5. To remove any document from the pin list, click the **Edit** button at the top of the list.
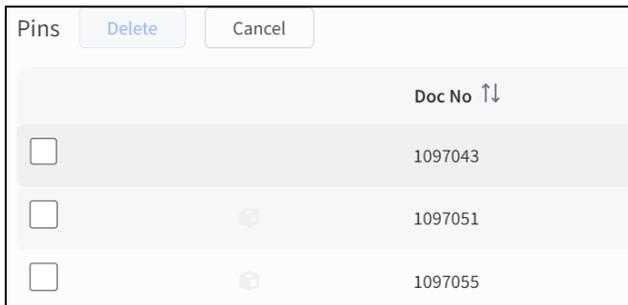
6. Check the box to the left of any document(s) you wish to delete from the list, click **Delete**, then click the **Delete** button in the confirmation box that displays.

7. Click **Cancel** to exit Edit mode.

8. To search for a particular document or description (notes) that is currently displaying on the screen in a pin list, click in the **Find an item** field and type the item you are looking for.

The matching item(s) will be highlighted in the list.

9. **Add custom document**: To add a message or note to any pin list, click the **Add custom document** option in the upper right corner of a pin list. A message box will display.

10. Enter a note or message in the **Document name** field and any additional information in the **Notes** field then click **Add**.

The message/note will display in the pin list with a "Custom document" symbol next to it.

11. To edit the "Document name" or "Notes", click anywhere on the row of the custom document then edit either value.

12. Press **Tab** or click away from the edited row to save the edited value.

13. To edit the name of, or notes in, a pin list, click the **three dots** next to the list name at the top of the library screen then click **Edit details**.

   a. Edit the name and/or the description of the pin list in the screen that displays then click **Save**.
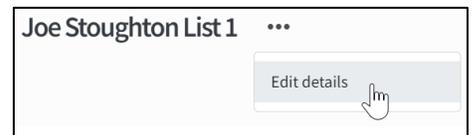
When you open the pin library, a navigation panel will display on the left side of the **Library** screen.
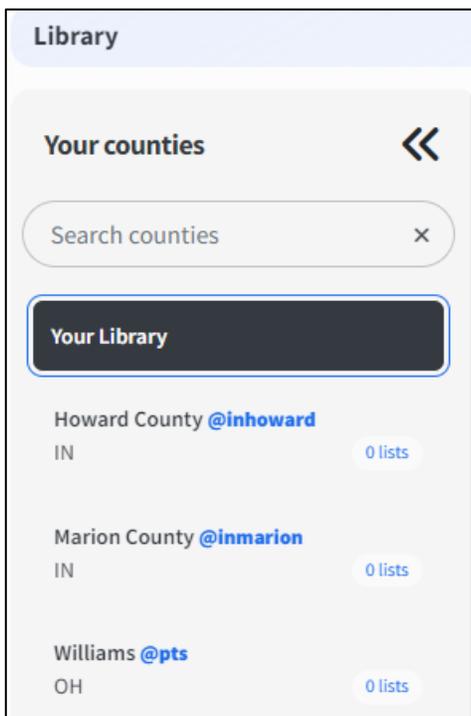
14. Click the double **Left Arrow** to collapse the navigation panel. A shortcut bar will display in the collapsed panel (see image on the right).

15. To return to a full listing of all of your pin lists from any other screen in the library, click **Your Library**.

16. If you have multiple county Laredo logins associated with your Laredo Anywhere global login, each Laredo login will be listed on the left panel. Click the county name icon to view the pin lists for any particular Laredo login.

17. If you have multiple county Laredo logins, you can search for a particular county by clicking in the **Search Counties** field then entering the county name. A list of matching counties will display. Click the desired county to display that county's pin list.

18. To create a new pin list, click the **Create new list** button in the top right section of the library window.
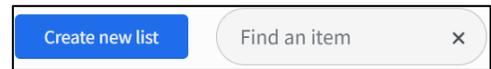

19. Enter a name for the list in the **List name** field and a description for the list in the **Notes** field then click **Create**.

20. To archive a pin list so that it doesn't, by default, display in the pin list, click the **Archive list** icon on the far right of a pinned list.

   a. The archived list will be hidden from the pinned list.

21. To view the archived pin lists, click the **Show Archived** button.

22. To add an archived pin list back to the full pinned list, click **Show Archived** then click the **Undo archive list Arrow**. The list will now display in the full pinned list.
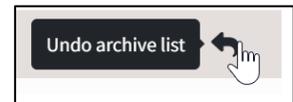
23. To return to the search screen, click **Search** at the top of the library window.

Either the Criteria screen or the Search results grid will display, depending on where you accessed the Library from.

TEMPLATES

The **Templates** function in Laredo Anywhere allows for users to create and modify their own search results grid layout.

1. The process of setting unique search results layout templates begins with running a search in Laredo Anywhere.

2. In the search results grid, adjust the search results in one or more of the following ways. **(NOTE:** All of the functions listed below are explained in detail earlier in this manual.) The template will be applied after the search results have been set to the desired view.

   a. Set the **Rows per page** to the desired number.

   b. Ensure that the **Distinct docs only** setting is set as desired (checked or unchecked).

   c. **Sort** the columns as you would like them to display.

   d. Set columns to the desired **width**.

   e. **Reorder** (drag) the columns to the desired position in the results.

   f. **Hide** any columns you do not wish to see in the results for this template.

   g. If you wish, **group** by any desired column.

3. When the search results are set for this new template, click **Templates** on the toolbar at the top of the results grid. A screen similar to the one below will display.
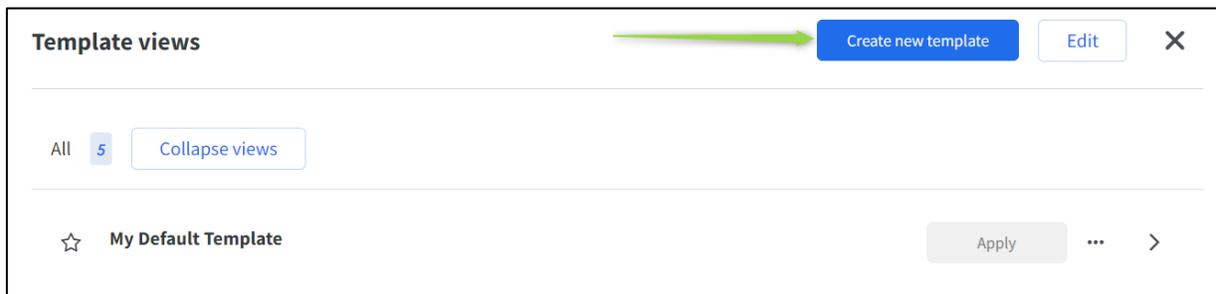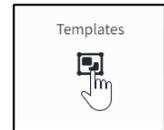
4. Click **Create new template**. A screen similar to the one showing on the left will open.

5. Enter a **Name** and a **Description** for this new template.

   a. If you would like this template to be your default template for all searches, click the **Use as Global Default:** toggle to turn it on.

   NOTE: If you have multiple Laredo user accounts associated with your current Laredo Anywhere global account and you select the **Use as Global Default:**, this template will be applied as the default template for all of the Laredo logins you utilize under the current Laredo Anywhere login.

   b. A **blue star** will display on the left side of the template name in the Templates screen for the template that is set as the global default.

6. Click **Save**. The new template name will display in the list of templates.

7. Once the template is saved, click **Apply** in the template bar that displays to set this template as the selected template for this search session.

8. To view the template details, click the **Down Arrow** on the right side of the **Template** bar.
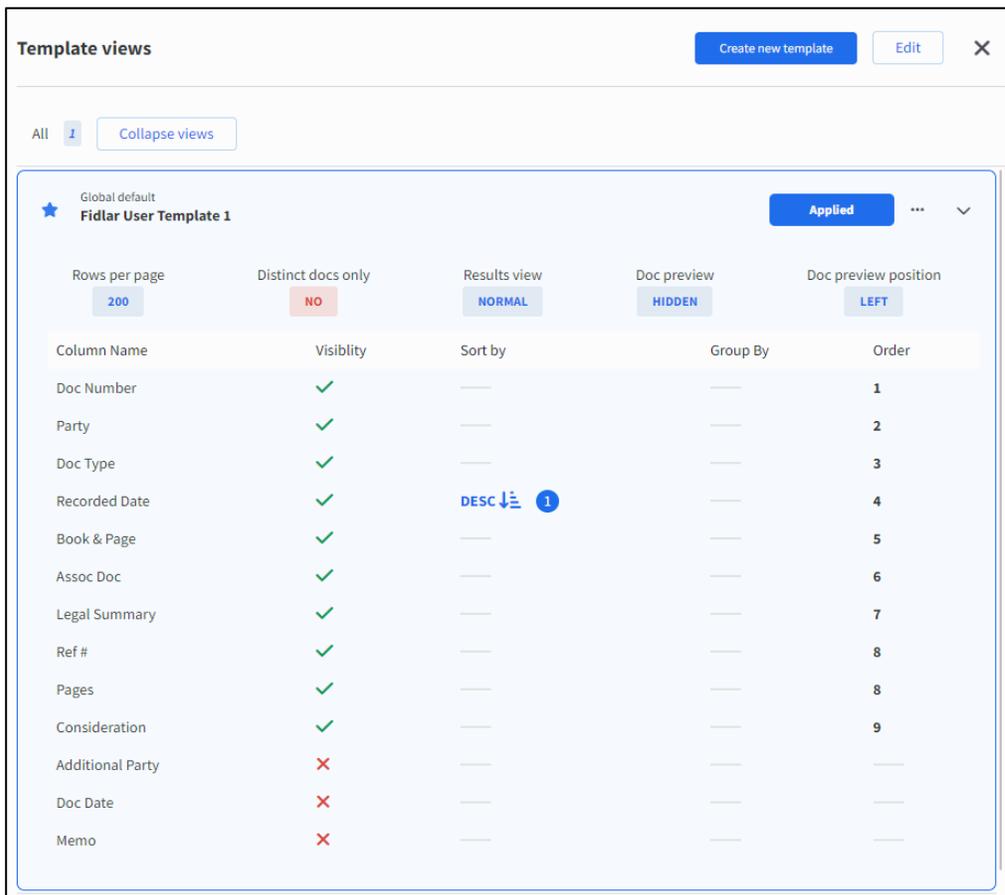
NOTE: This is a view-only screen; you cannot edit any template details here.

9. To close the **Template views** screen, click the **X** in the upper right corner.

10. To **edit** an existing template:

   a. Close the template screen then modify the search results as you wish them to display.

   b. Click **Templates** at the top of the results grid.

   c. Click the **3 dots** on the right side of the template bar to display a function menu.

   d. Click **Overwrite with current view** to apply the new results view to this template.

11. Additional Template menu items:

   a. Click **Unapply** to deactivate the currently-applied template. The search results will then display in the original Laredo template view.
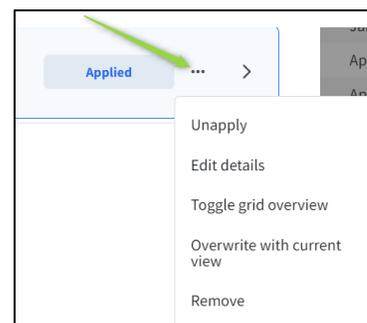
i. If you select the menu option for a template that is not the applied template, click **Apply** to apply that template as the search template for the current search.

b. Click **Edit details** to edit the name or description of the template and to check or uncheck the **Global Default** setting for the template.

i. **NOTE:** You can also set a template as your default template by clicking the **Star** on the left side of the template name. The star will turn blue to indicate that this is now the default template.

☆ My Template #3

c. Click **Toggle grid overview** (or the **Right Arrow**) to collapse or expand the template detail grid.

d. See #10 above for a description of the **Overwrite with current view** option.

e. Click **Remove** to delete this template.

12. To set the search results grid to display in a different existing template view, click **Templates** at the top of the search results, click **Apply** next to the template you would like to switch to then click the **X** to close the templates screen.

☆ My Template #3   Apply   ···   >

SAVED SEARCHES

Any searches that have been saved, following the steps described on page 33, can be viewed in the **Saved Searches** section of Laredo Anywhere, accessed from the **Navigation** panel.
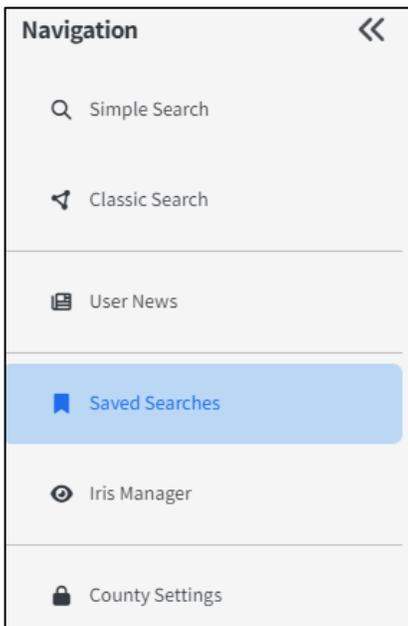
1. Click **Saved Searches** in the Laredo menu bar on the **Navigation** panel to view any searches you have saved. The saved searches will display in the **Saved Searches** screen.
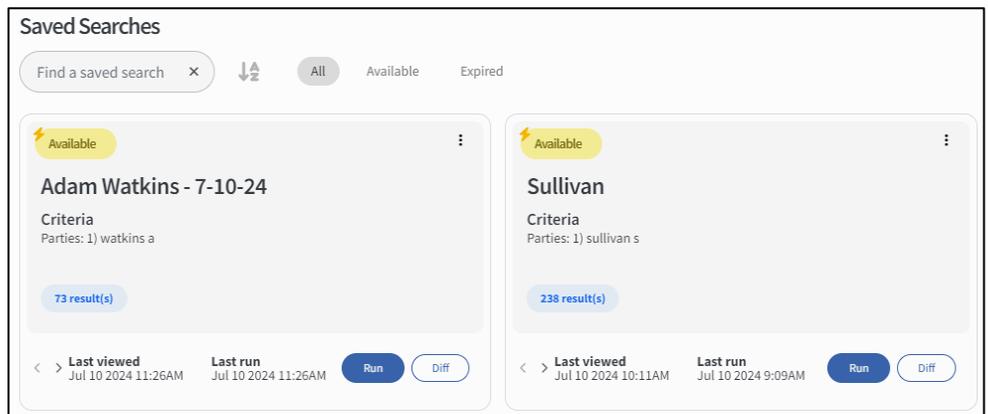
Each Laredo search that has been saved will display in a separate panel.

2. Each panel will display the following information:

a. **Available**: If the search has not expired (in most counties, a saved search will expire 90 days after it has been saved), the yellow oval at the top of the panel will display "**Available**". Hover the mouse over the oval to display the expiration date of the saved search. If the search has expired, this oval will state "**Expired**". Hover the mouse over the oval to display the date the saved search expired.

b. The name of the saved search.

c. The search **Criteria** that was originally entered when the search was executed and saved.

d. The number of results the saved search generated.

e. **Last viewed**: This field will display the date and time the search was last viewed (by clicking on **Run**).

f. **Last run**: This field will display the date and time the search was last run.

g. Click the **Right Arrow** next to **Last viewed** (identified by the green arrow in the image below) to view the email address and/or phone number (if applicable) entered when the search was saved.
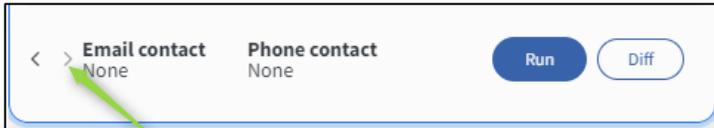
3. To run the search from this window, click **Run**. Laredo Anywhere will run the search utilizing the original search criteria that was entered when the search was first run and saved. You can then order the search results in Recording Date order to view any documents that have been recorded since the search was originally saved.

a. With the search results displaying in Laredo Anywhere, click **Back to saved searches** in the **Navigation** panel on the left side of the search results to return to the **Saved searches** screen.
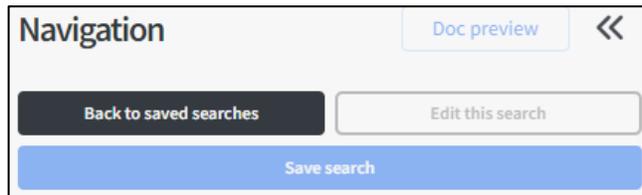
b. **NOTE:** The **Edit this search** and **Save search** buttons are not available when viewing the results of a saved search that has been run from the **Saved Searches** section of Laredo Anywhere.

4. To view a list of any documents matching the index data originally searched that have been recorded in the county since the date the original search was executed and saved, click the **Diff** button at the bottom of the **Saved searches** box. Also, in the unlikely event that any documents have been removed from the system that were listed in the original search, these removed documents will also be listed.
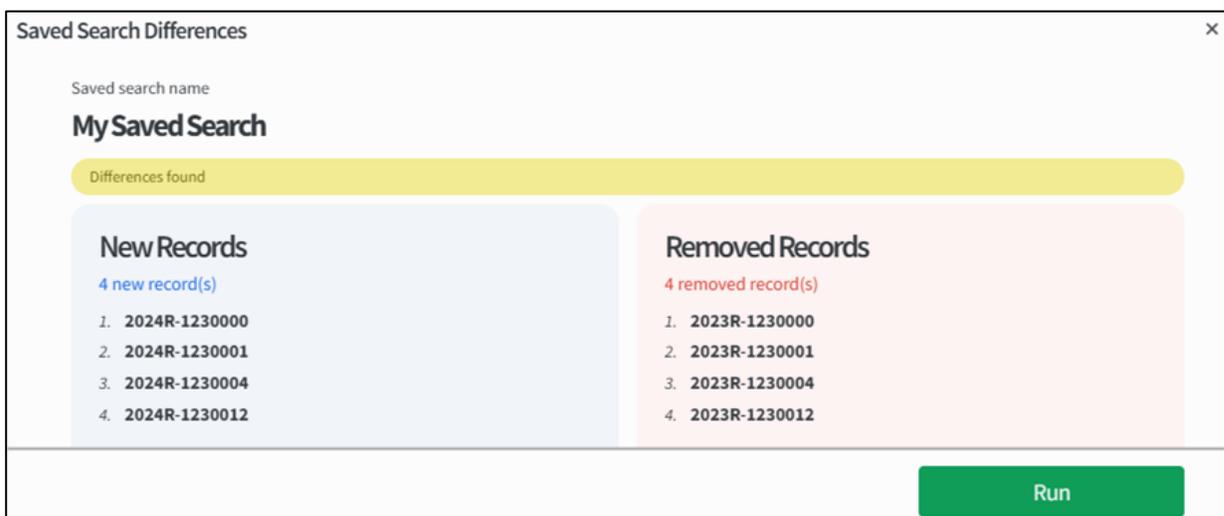
5. Click the **Run** button at the bottom of the **Saved Search Differences** box to re-run the saved search.

6. Sorting options for saved searches:
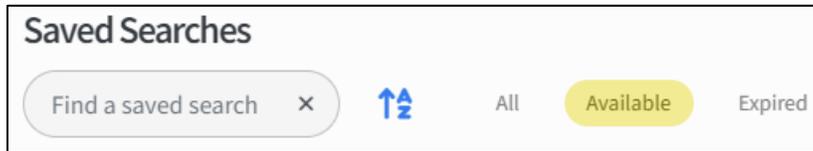
a. To find a particular saved search in the list, enter the name of the saved search, or a portion of the name, in the **Find a saved search** field.

b. To order your saved searches alphabetically, click the blue **Arrow**.

c. To view only the saved searches that have not expired, click the **Available** oval.

d. To view only the saved searches that have expired, click the **Expired** oval.

IRIS MANAGER

IRIS has the potential to enhance the data integrity and efficiency of your searching in Laredo Anywhere. It can simplify searches involving multiple names or alternate spellings by allowing the creation of alias groups, ensuring comprehensive search results without the need to search multiple different ways for party names and addresses. IRIS empowers users to create and manage their own group names and aliases, customizing searches to their needs.

IRIS ALIAS EXAMPLES
Listed below are a few examples of the types of alias names you may wish to enter in IRIS:

1. FIRST NAMES / NICKNAMES:

    a. Robert: Bob, Robbie, Robt, Bobby

    b. Elizabeth: Liz, Beth, Lizzy, Betsy

2. LAST NAMES:

    a. Anderson: Andersen

    b. Smith: Smyth

    c. MacGuire: McGuire, Mac Guire, McGwire, Maguire

3. BUSINESS NAMES:

    a. Wells Fargo: Wells Fargo Bank, Wells Fargo & Company, Wells Fargo and Company, Wells Fargo and Co

    b. Department of Natural Resources: Dept of Nat Res, Dept of Natural Resources, Department of Nat Res

    c. (For companies that have changed names): Wachovia Bank: Wells Fargo, Wells Fargo & Company, Wachovia Bnk, Wachovia Bk

4. ADDRESS STREET NAMES:

    a. 1st Avenue: First Avenue, First Ave, 1st Ave

    b. (For streets that have changed names): Main Street: Martin Luther King Blvd, Martin Luther King Boulevard, Main St.

UTILIZING IRIS

NOTE: If "Iris Manager" is not listed on the Navigation panel, the county may not utilize IRIS. You may wish to contact the county Recorder / Register to ask them if they are interested in activating this feature.

CREATING A NEW IRIS ENTRY
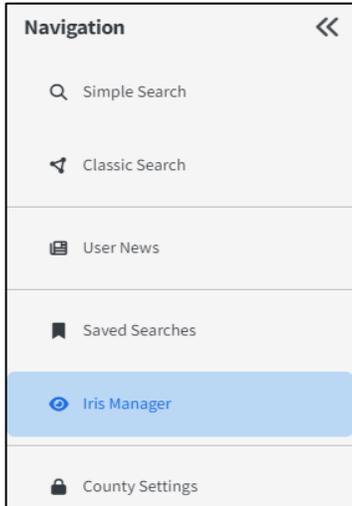
1. To create search aliases and to view and manage your IRIS lists, click **Iris Manager** in the Laredo menu bar on the **Navigation** panel. A screen similar to the one shown below will display.
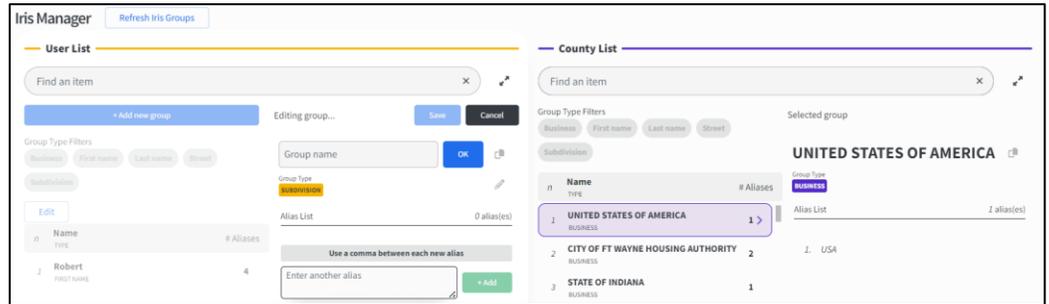
NOTE: The **County List** section of IRIS on the right side of the screen is not utilized by Laredo searchers – it is only accessed by county officials.

2. To create a new IRIS alias group, click **+Add new group**.
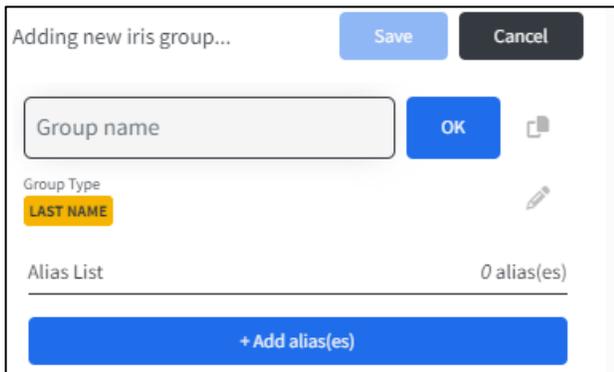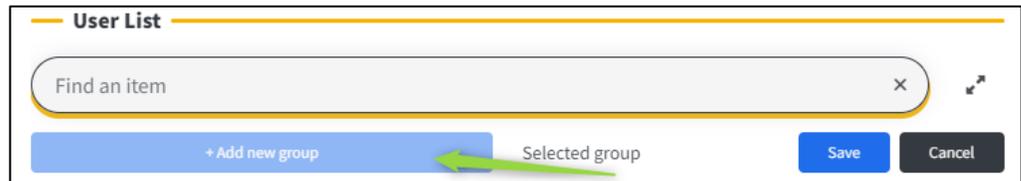
3. Enter a first name, last name, business name, or street name in the **Group name** field then click **OK**.

NOTE: The group name is also considered to be one of the alias names so a search in Laredo for either the group name or any of the alias names entered will return results that include documents that match all of the alias names and the group name.

4. Click the **Pencil** in the **Group Type** field to select the correct IRIS group type in the drop down list that displays.

5. Select the correct group type in the list.

45
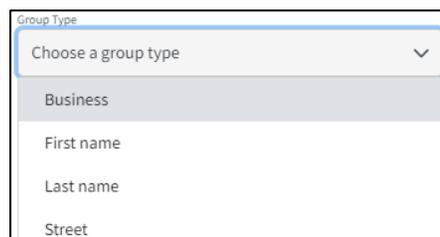
6. Click in the **Enter another alias** field and enter one or more alias names in this field, with multiple names separated by a comma.
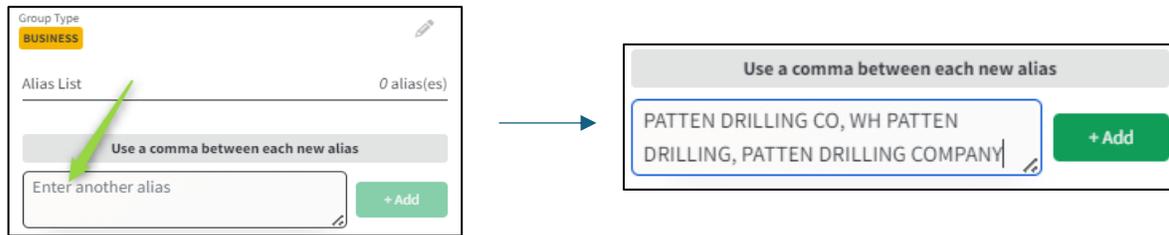
7. Click **+Add**.

8. When all alias names have been entered, click the **Save** button above the group name. The new IRIS group name will then display in the **Name** list on the left side of the Iris Manager window.
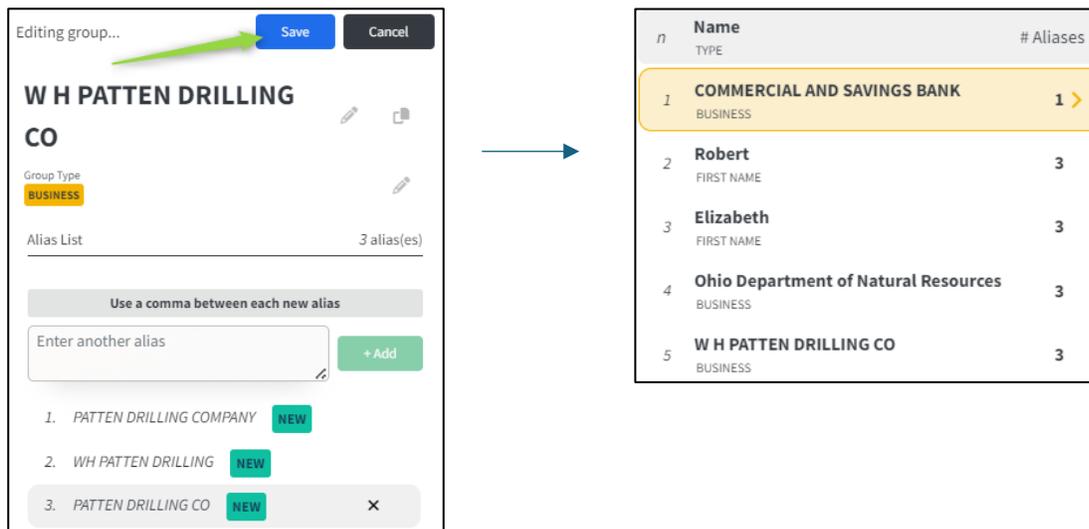
EDITING AN IRIS ENTRY

9. To edit an alias group, click the group in the **Name** field to highlight the name. The group name will display in the middle of the Iris Manager screen.
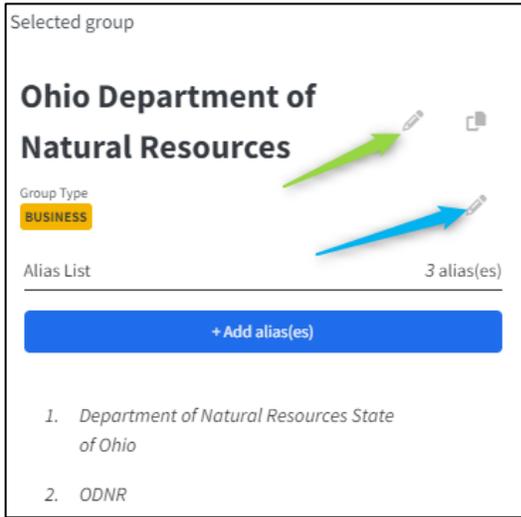
10. Click the **pencil** icon next to the group name (identified by the green arrow in the image on the left) to edit the group name.

11. Edit the name as desired then click **OK**.

12. Click the pencil in the **Group Type** section (identified by the blue arrow in the image on the left) to edit the group type.

13. Select the correct group type from the list.

14. To add additional alias names for any group, with the group name highlighted in the **Name** list, click **+Add alias(es)**.

15. Add additional alias names then click **+Add**.
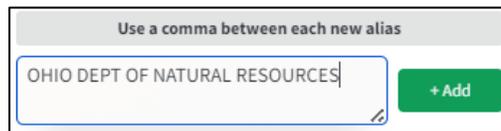
16. When all edits to an IRIS group have been made, click the **Save** button above the group name.


17. To remove an alias name from an IRIS group, click the group in the **Name** field to highlight the name then click the **X** next to any alias name you wish to delete from the group.
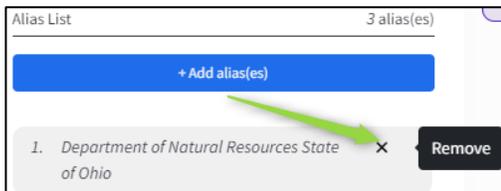

18. To remove one or more group names from the IRIS list, click **Edit** at the top of the **Name** list.

19. Check one or more group names in the list that you wish to delete then click **Remove**.
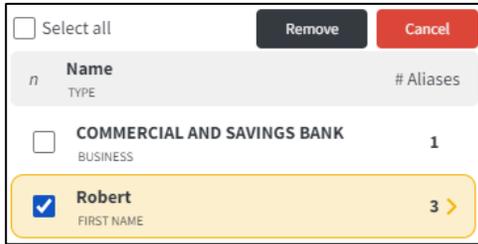
20. Follow the steps listed above to create or edit any IRIS business names, first names, last names, or street names.

21. To search for an IRIS alias name in your **User List**, click in the **Find an item** field and type any portion of the alias name to narrow the list that displays in the **Name** list to names that match what is entered.

   a. You can also filter your list of names by group type by clicking on one or more of the group types in the **Group Type Filters** section.
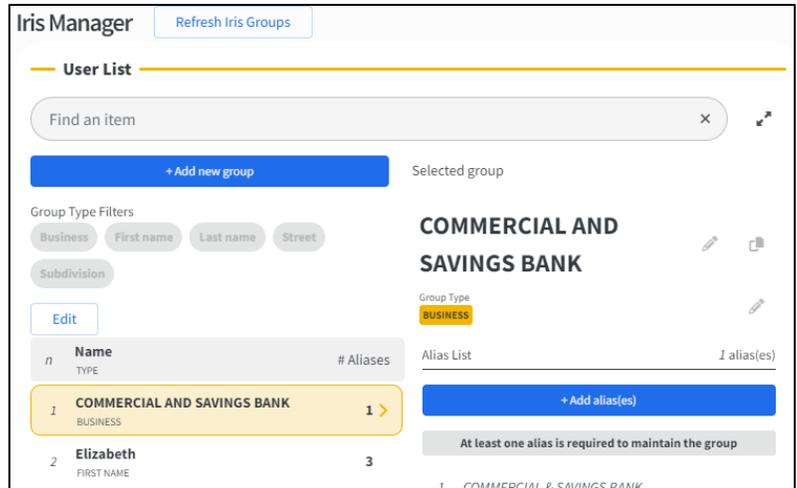
IRIS SEARCH TIPS

NOTE: Some of this information is mentioned earlier in this manual in the search criteria section.

PARTY NAME SEARCHING

1. To utilize IRIS when searching for a **last name** or **business name** (in Classic Search mode), enter the name in the **Name** field of Laredo Anywhere.
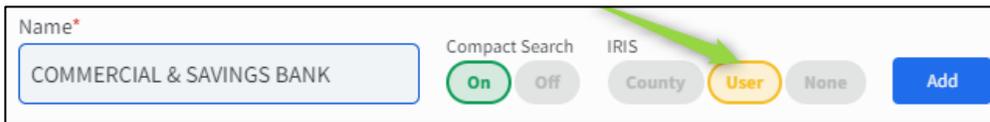
2. To activate IRIS for the search, click **User** in the **IRIS** section of the **Name** field, click **Add** then click **Run**.
   a. **NOTE:** If the county Recorder/Register office in which you are searching has created an IRIS alias list, click **County** in the **IRIS** section to search for a name utilizing the county-created IRIS list.

   The search will return documents in the search results in which any of the IRIS alias names have been indexed.

3. If you wish to search for an individual's name utilizing an IRIS alias **first name**, you must enter a comma between the last name and first name in the **Name** field (for example: Smith, Robert), even if the county does not index commas in the name field.
   a. If the county does not index commas in the name field, and you enter a comma to utilize a first name IRIS alias, make sure that the **Compact Search** field is set to **On**.

DASHBOARD

The Laredo Anywhere Dashboard lists all of your linked Laredo accounts and is the screen in which you can add additional counties to your Laredo Anywhere account.

1. Click **Dashboard** at the top of the Laredo Anywhere screen to access your dashboard.
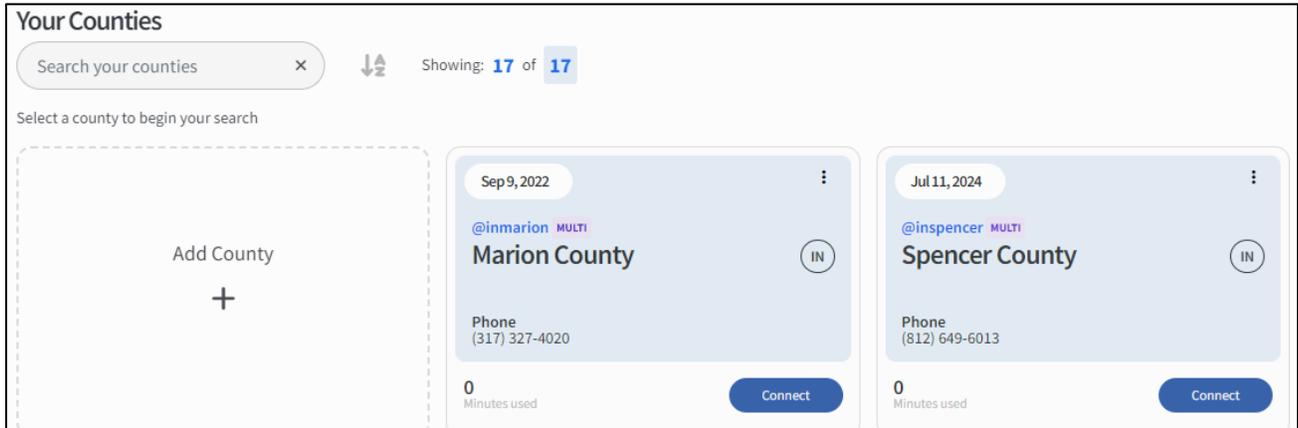
> **NOTE:** See the **LINKING A COUNTY LAREDO SEARCH ACCOUNT** section on page 5 of this manual for a description of the process of adding a new county Laredo login to your Laredo Anywhere account.

> Each County card will display the Laredo account's **username**, the primary **Phone number** associated with the account, and number of minutes (**minutes used**) that each particular Laredo user has been logged into Laredo for the current month.

2. If you have many Laredo accounts linked to your Laredo Anywhere account, you can enter a county name in the **Search your counties** field at the top of the dashboard to display all matching county names.

3. To remove a Laredo county from your Laredo Anywhere account, click the **three dots** in the upper right corner of the county card then click **Remove**. The county will be removed from your Laredo Anywhere account.

> **NOTE:** Removing a county from your dashboard does not cancel your Laredo user account; you will still need to contact the county Recorder/Register to cancel any Laredo user accounts.
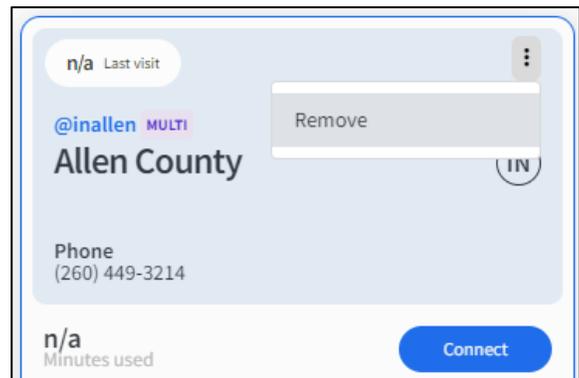
LAREDO MENU – PART 2

## SIMPLE SEARCH

Laredo Anywhere includes the functionality, known as **Simple Search**, to search for documents by entering search criteria in a single text field.

1. To access the single text field search option, click **Simple Search** on the left side of the Laredo Search menu.
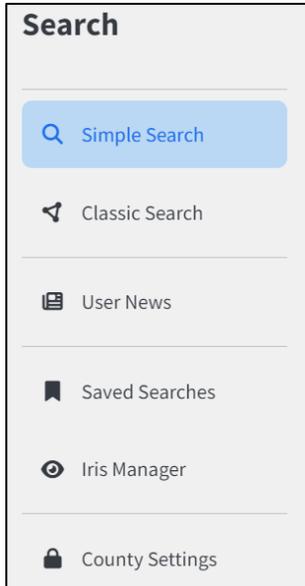

The screen shown below will open:
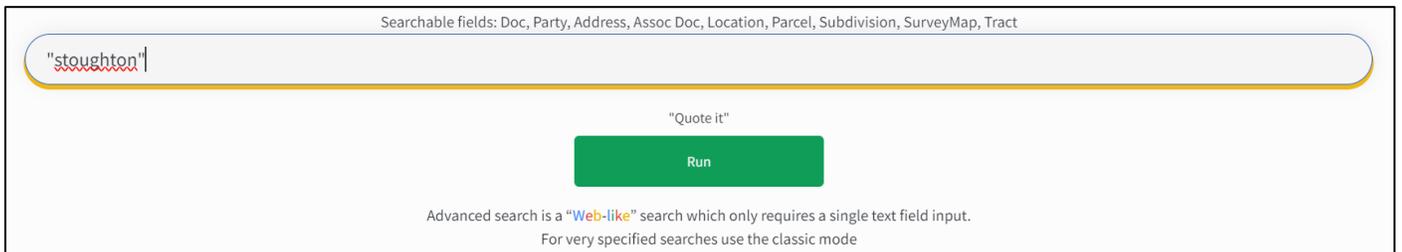
2. Enter the criteria you wish to search for in the text bar then click **Run**.

3. For a description of the format in which to enter criteria in the text field, click **Settings** in the toolbar at the top of the Laredo Anywhere screen.

Settings

😊 Profile

🔒 Password

💳 Billing

💬 Support
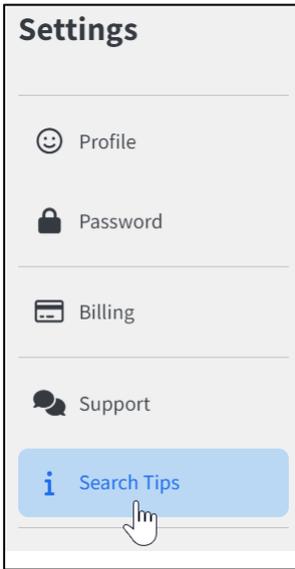
ℹ️ Search Tips

4.   Click **Search Tips** to open a window in which you will find tips on how to enter criteria in the **Simple search** text field.

NOTE: A more detailed description of executing a simple search will be included in a future version of the Laredo Anywhere manual.

COUNTY SETTINGS

1. If you would like to change your Laredo login password (for the Laredo search program) from the password originally entered when you first linked your Laredo account to your Laredo Anywhere global account, click **County Settings** on the left panel of the Laredo Anywhere home **Search** screen. A screen similar to the one shown below will display.

🔒 **County Settings**

Contact
Ozaukee County phone number

📞 (262) 284-8260

County password

Existing password*

Existing password

New password*

New password

Confirm password*

Confirm password
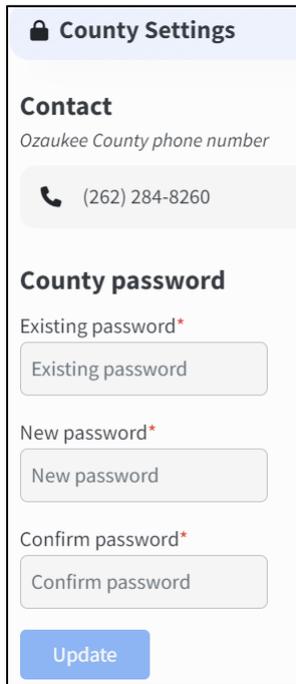
Update

2.   Enter your **Existing password** then enter the new password you would like to set in both the **New password** and **Confirm password** fields then click **Update** to save the new password.

LAREDO ANYWHERE SETTINGS

In the general Laredo Anywhere **Settings** menu, you can update your Laredo Anywhere profile, change your Laredo Anywhere password, access your Laredo Connect billing information (if applicable), contact the Fidlar Support team, and view the simple search tips.

LAREDO ANYWHERE PROFILE

1. To view and edit your Laredo Anywhere profile, click **Settings** in the toolbar at the top of the Laredo Anywhere screen.

   A screen similar to the one shown on the right will display.
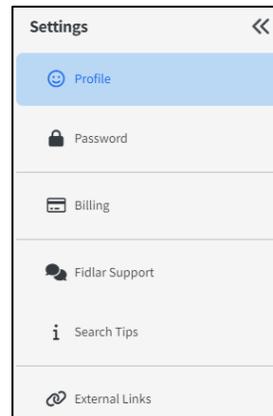
2. Click **Profile** to open the screen shown below.
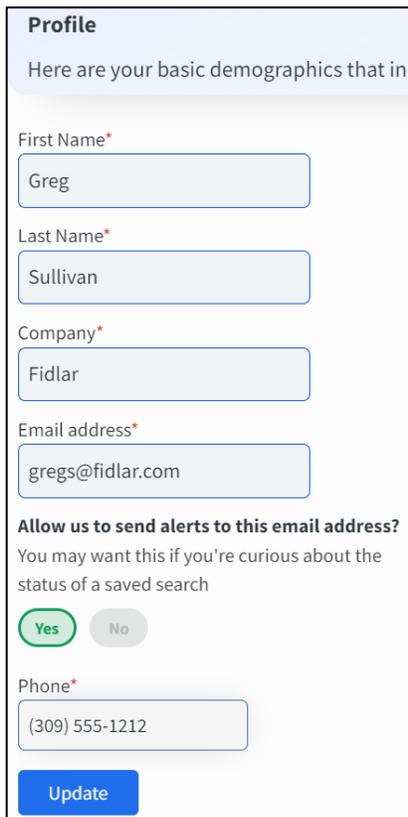
3. Edit any of fields you wish then click **Update**.

4. To update your email preference regarding receiving email alerts about the status of a saved search, click **Yes** or **No** in the **Allow us to send alerts to this email address?** section.

LAREDO ANYWHERE PASSWORD

1. To change your Laredo Anywhere password that was set when you first set up your Laredo Anywhere global account (this is NOT your Laredo subscription program password), in the **Settings** menu bar, click **Password**.

2. Enter your **Existing password** then enter your new password in both the **New password** and **Confirm password** fields.

3. Click **Update**.

LAREDO BILLING

If the county in which you have a Laredo account utilizes Laredo Connect to bill you for your Laredo access, you can access your Laredo Connect account from the Laredo Anywhere **Settings** menu.

1. To access your Laredo Connect billing account, click **Billing** in the Laredo Anywhere **Settings** menu bar. The screen shown below will display.
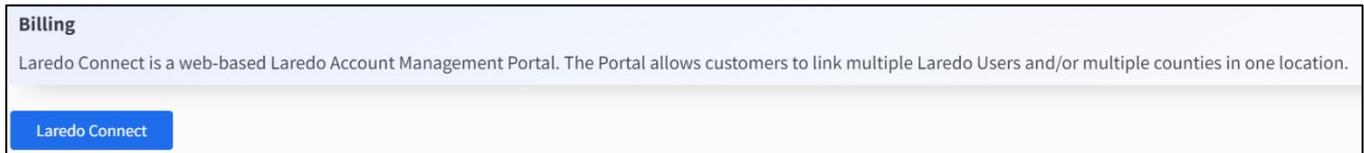
2. Click **Laredo Connect** to open the Laredo Connect portal associated with your Laredo account.

SUPPORT

1. To contact the Fidlar Support team and view contact information, click **Support** in the Laredo Anywhere **Settings** menu bar. The screen shown below will display.
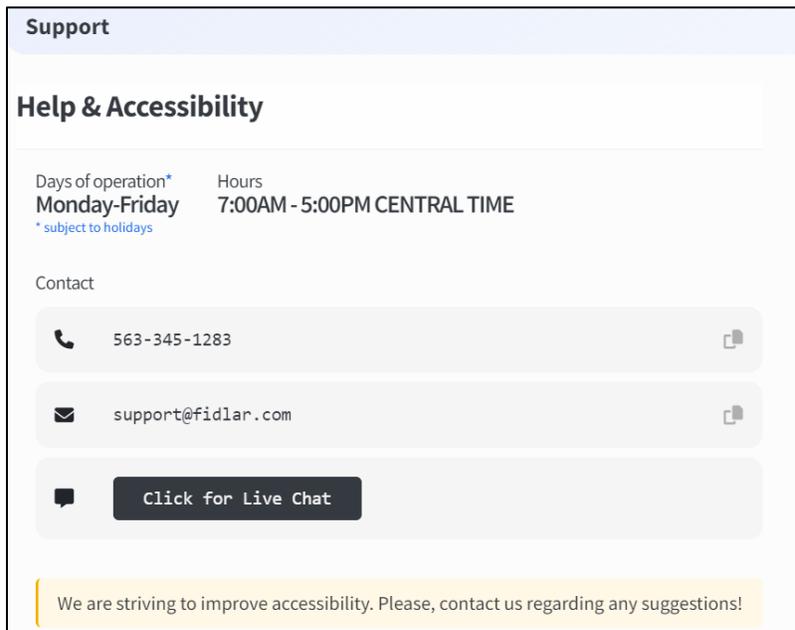
2. You may call or email the support team or click the **Click for Live Chat** option to chat with a Fidlar support team member.

SEARCH TIPS

NOTE: See the **Simple Search** section on page 51 of this manual for a description of the **Search Tips** section of the Laredo Anywhere menu bar.

EXTERNAL LINKS

1. To learn more about additional programs that Fidlar Technologies offers, click **External Links** in the **Settings** menu bar to open the screen shown to the right.