



FileBound Basic Search User Guide

How do I perform a search?	3
1. Open the Search Page	3
2. Select a Project	4
3. Specify the Search Criteria	5
How do I search for a file that starts with a specific letter or number?	6
1. Specify the Search Criteria for a Specific letter or Number	6
How do I search for blank index fields?	7
1. Perform the Search for Blanks/Empty Index Fields	7
What wildcards can be used in a search?	8
1. Wildcards	8
How do I repeat the search that was last performed?	9
1. Repeat the Last Search	9
How do I search for content in the file notes?	10
1. Specify the Search Criteria for File Notes	10
How do I search for content in the document notes?	11
1. Specify the Search Criteria for Document Notes	11
How do I search for a document by name?	12
1. Specify the Search Criteria for Document Name	12
How do I view documents listed in the Search Results?	13
1. View a Document in the Search Results Page	13
2. View Multiple Documents in the Search Results Page	14
How do I edit the search criteria for a search that was performed?	15
1. Open the Edit Search Dialog Box	15
2. Edit the Search Criteria	16
How do I print the list of search results?	17
1. Print the Search Results	17
How do I export the search results to Microsoft Excel?	18
1. Open the Export List Dialog Box	18
2. Select the Records to Export	19



[How do I sort search results again using a different column heading?](#)..... 20

[1. Sort the Search Results](#)..... 20

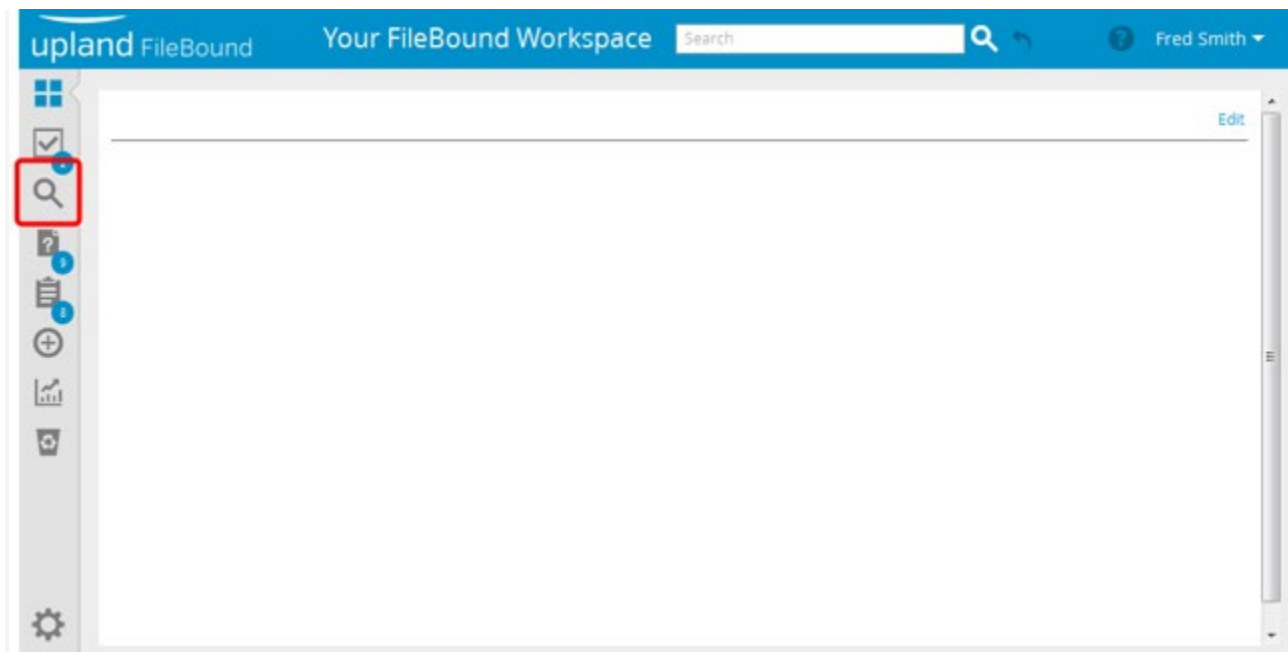
How do I perform a search?

You can search for files located within a project. In each project, you can perform a search using the project's specified index field values.

System Administrator configures user access to the projects. In the **Project** list within the **Search** page, you can see only those projects that you have access rights for.

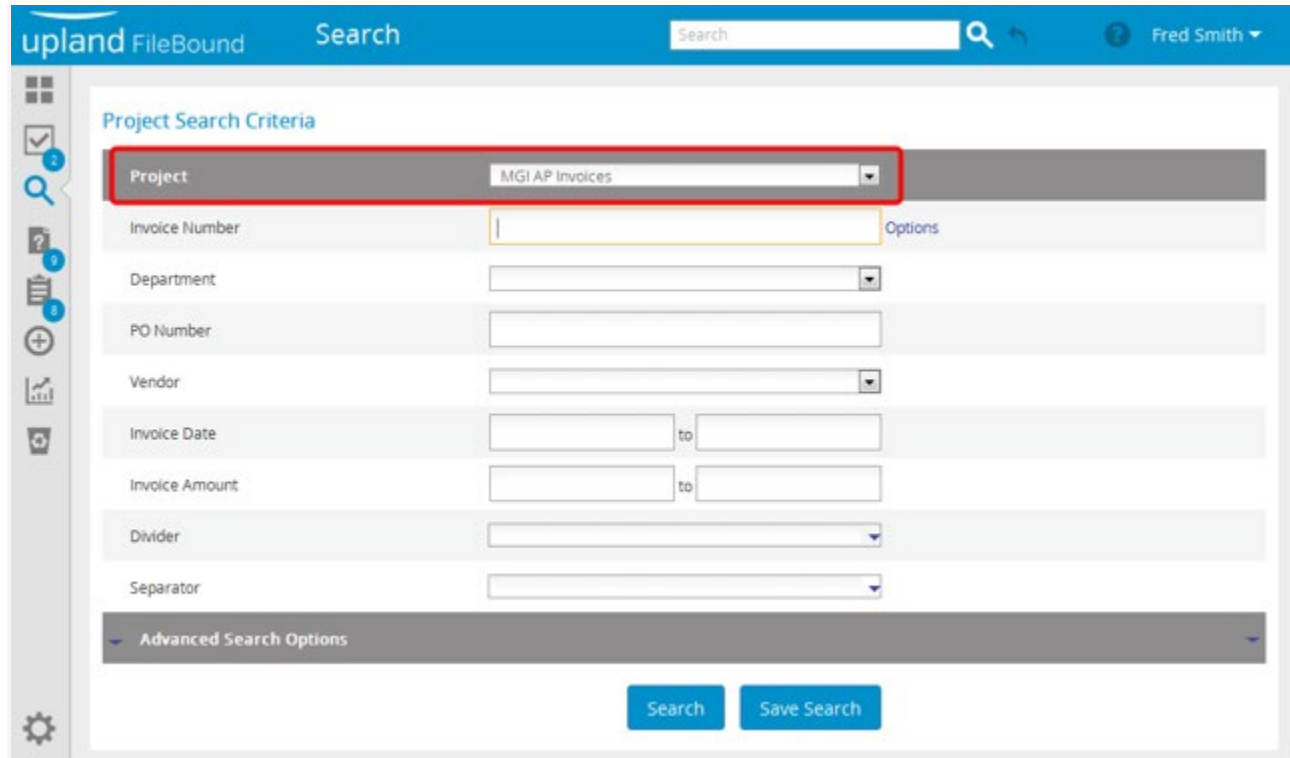
This lesson shows you how to perform a search.

1. Open the Search Page



- Click the search icon on the navigation pane. The **Search** page opens.

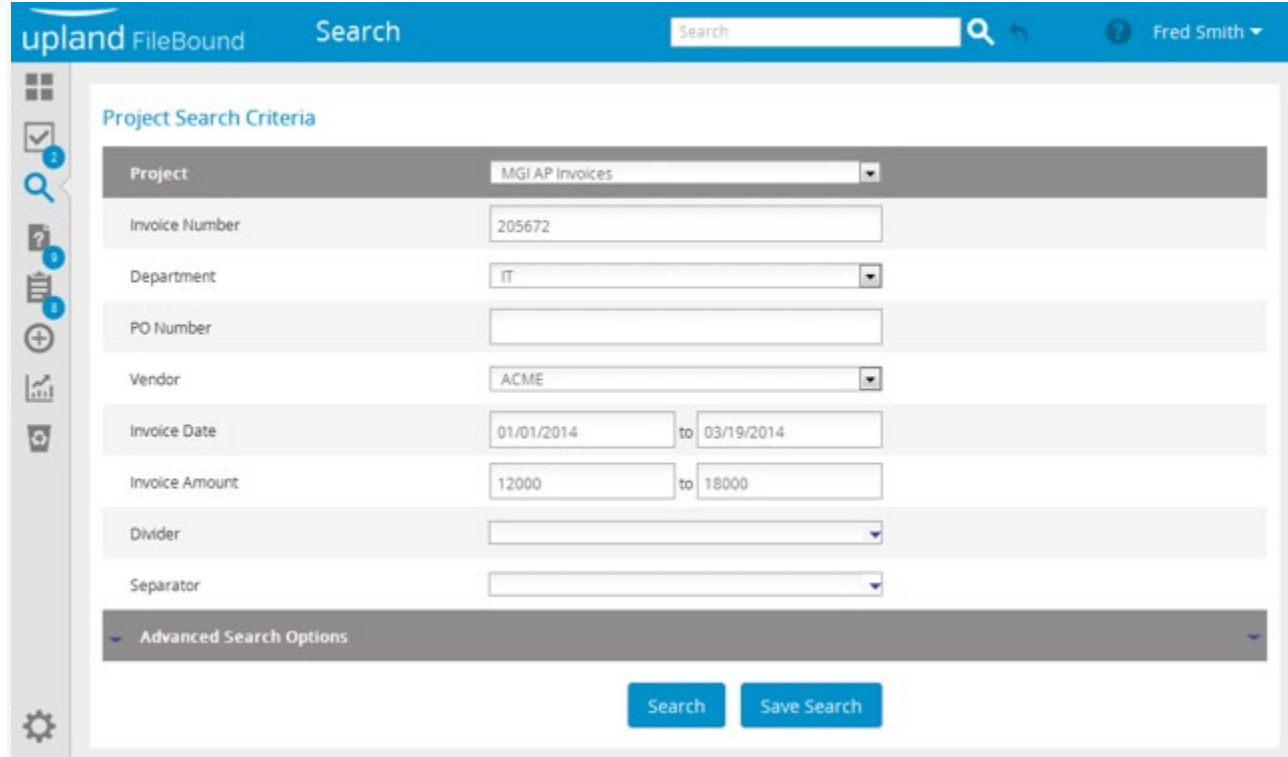
2. Select a Project



The screenshot displays the 'upland FileBound' search interface. At the top, there is a search bar and the user's name 'Fred Smith'. The main section is titled 'Project Search Criteria' and contains several input fields: 'Project' (highlighted with a red box and set to 'MGI AP Invoices'), 'Invoice Number' (with an 'Options' link), 'Department', 'PO Number', 'Vendor', 'Invoice Date' (with 'to' separators), 'Invoice Amount' (with 'to' separators), 'Divider', and 'Separator'. Below these fields is an 'Advanced Search Options' section. At the bottom, there are 'Search' and 'Save Search' buttons.

- Select a project from the **Project** list, to perform the search within that project. Projects are organized in the list within two separate sections, **Recent Projects** and **All Projects**. The projects that are used recently are listed within the **Recent Projects** section of the list and all the projects are listed within the **All Projects** section of the list.

3. Specify the Search Criteria



The screenshot shows the 'upland FileBound Search' interface. The search criteria are as follows:

Field	Value
Project	MGI AP Invoices
Invoice Number	205672
Department	IT
PO Number	
Vendor	ACME
Invoice Date	01/01/2014 to 03/19/2014
Invoice Amount	12000 to 18000
Divider	
Separator	

Buttons: Search, Save Search

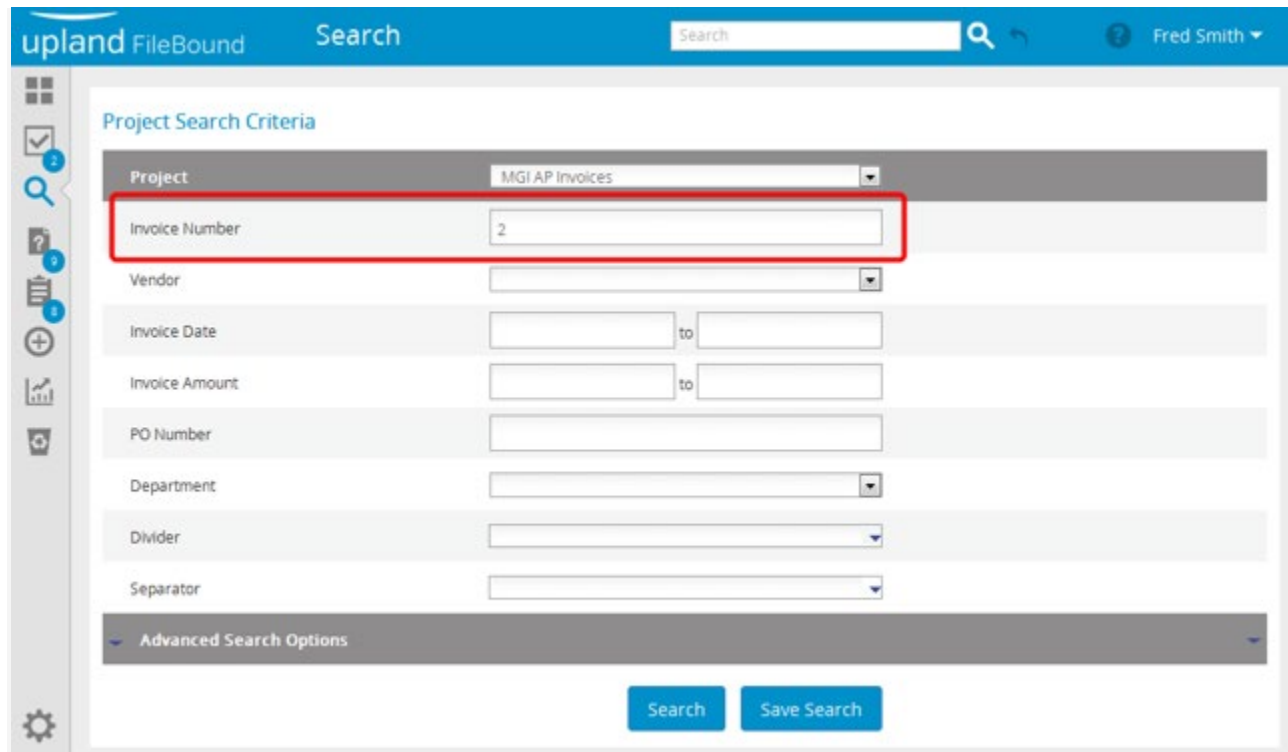
1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields.
Note: You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.

Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

How do I search for a file that starts with a specific letter or number?

This lesson shows you how to search for a file that starts with a specific letter or number.

1. Specify the Search Criteria for a Specific letter or Number



The screenshot shows the 'upland FileBound' search interface. The 'Project' is set to 'MGI AP Invoices'. The 'Invoice Number' field is highlighted with a red box and contains the number '2'. Other fields include 'Vendor', 'Invoice Date', 'Invoice Amount', 'PO Number', 'Department', 'Divider', and 'Separator'. There are 'Search' and 'Save Search' buttons at the bottom.

1. Specify the first letter or number of the file to be searched.
2. Click **Search**.

The **Search Results** page displays the files that satisfy the search criteria.

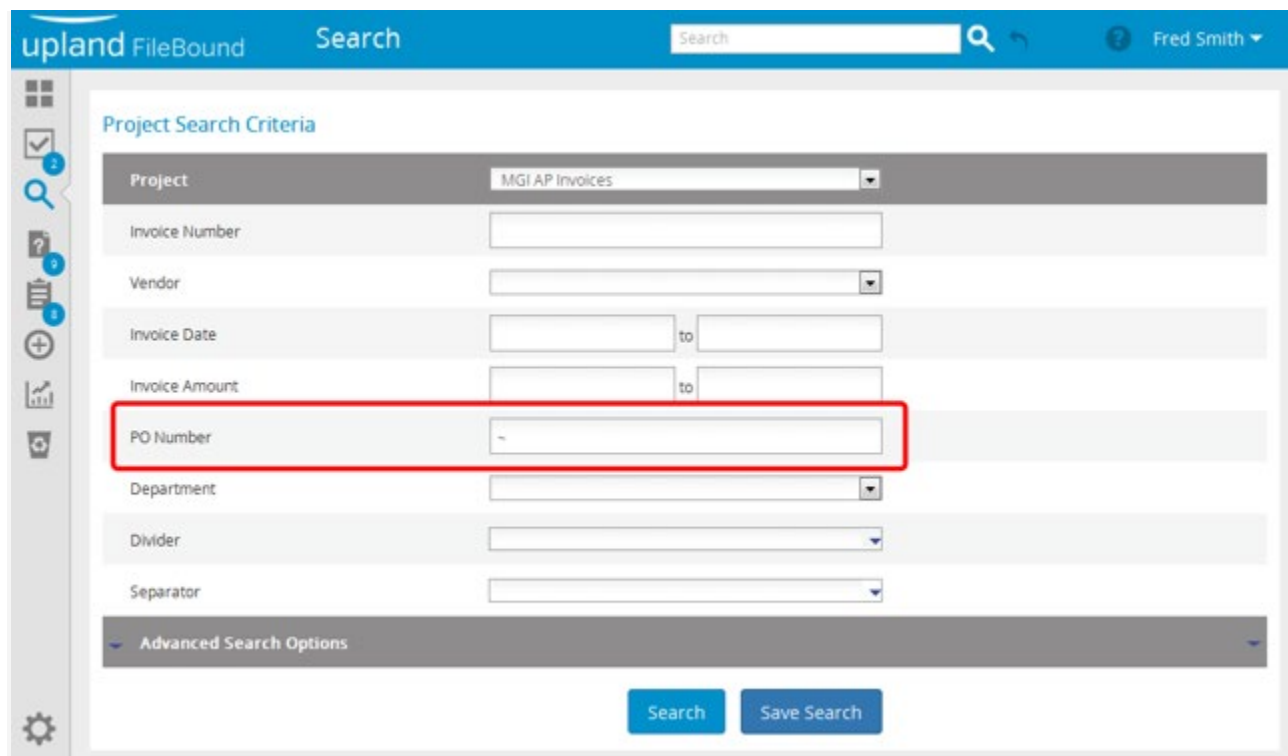
Note: You can use this feature only for index fields that have been configured as "Text", "Number", or "Terminal Digit" field type.

How do I search for blank index fields?

You may need to perform a search for files that have an index field that is blank within a FileBound project. To perform this search, you need to enter a tilde (~) into the index field to be searched. The search results displays all of the files that did not have a value stored for that index field.

This lesson shows you how to search for a blank/empty index field.

1. Perform the Search for Blanks/Empty Index Fields



The screenshot shows the 'upland FileBound Search' interface. The 'Project' dropdown is set to 'MGI AP Invoices'. The 'PO Number' field is highlighted with a red box and contains a tilde (~). The 'Search' button is visible at the bottom.

1. Type tilde (~) into the index field to be searched.
2. Click **Search**.

The **Search Results** page displays the files that did not have a value stored for that index field.

Note: You can use this feature only for the index fields that have been configured as "Text", "Number", or "Terminal Digit" field type.

What wildcards can be used in a search?

FileBound has a set of search variables that can be used for altering search criteria when performing a search. This lesson provides information about the wildcards that can be used in a search.

1. Wildcards

Wildcard (%): This variable performs a wildcard search and retrieves all the files. It is useful for both alphanumeric and numerical field values. When used at the beginning of the search criteria the index field will be searched for the entered criteria anywhere within the index field, not just at the beginning.

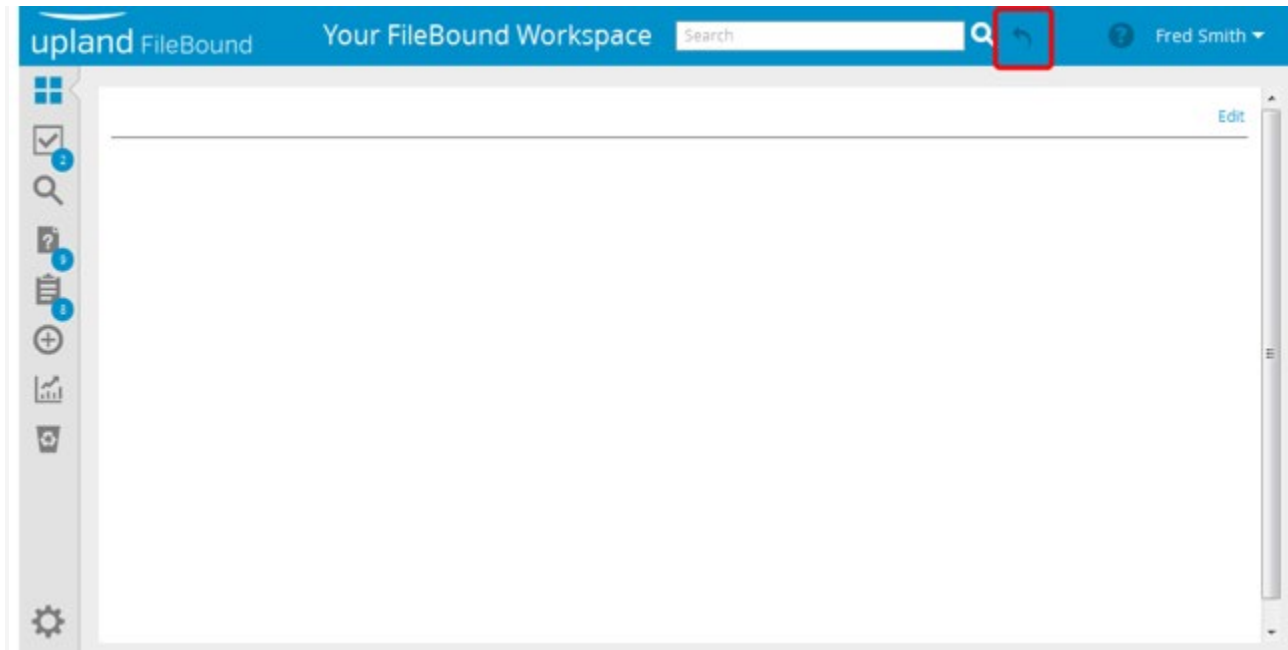
Exact (~): This variable performs an exact search, when you place it at the end of the search string. For example, "Brian~" retrieves all the records having the exact value "Brian". It is also useful for both alphanumeric and numerical values.

Exclude (!): This variable excludes the search string from the search result, when you place it in the beginning. For example, "!Brian" retrieves all the files that do not begin with "Brian".

How do I repeat the search that was last performed?

This lesson shows you how to repeat the search that was last performed.

1. Repeat the Last Search



- Click the last search icon on the toolbar, to repeat the last search performed.

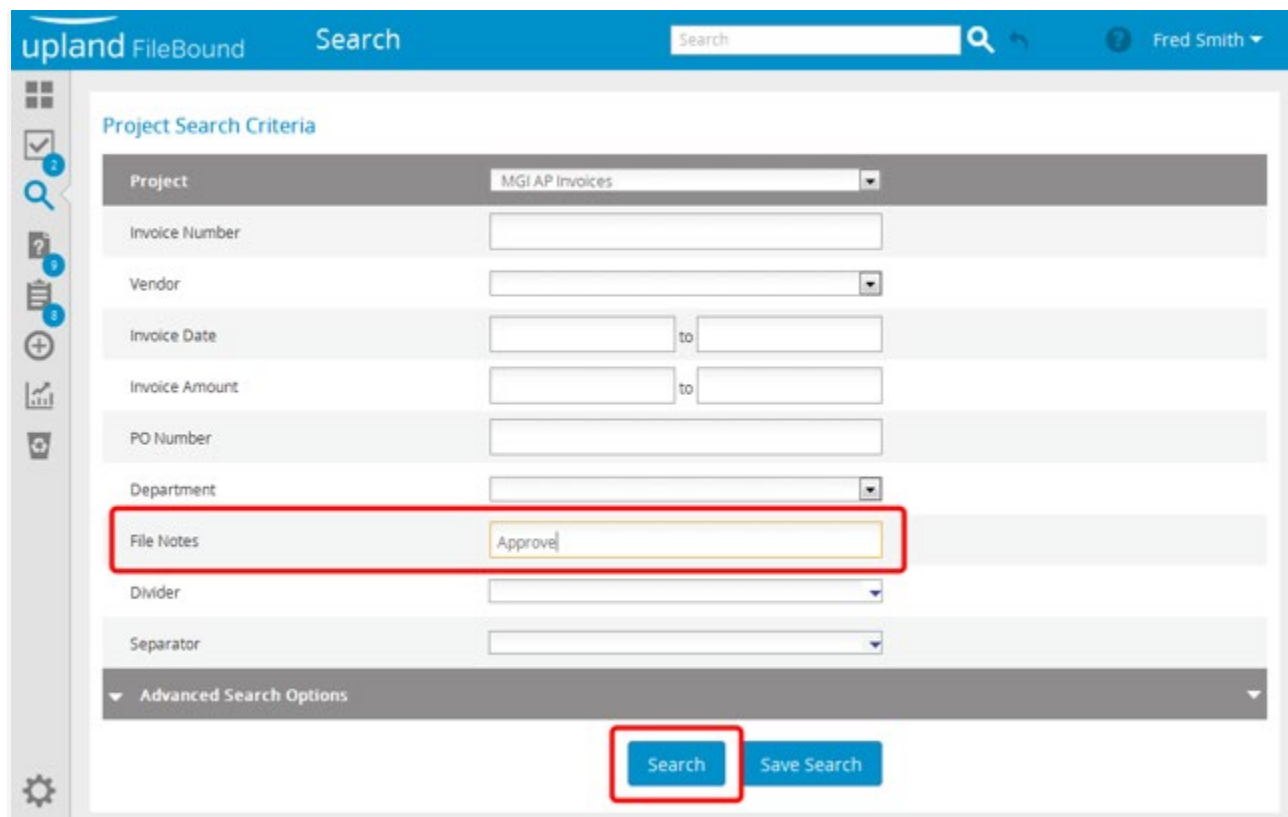
Note: If you have not performed any search and clicked the last search icon, the search that you had performed last when you closed FileBound, is performed.

How do I search for content in the file notes?

You can search for files, based on the words written in the file notes. File notes are created for storing file related information using the **Notes** tab within the **Viewer** in FileBound. If the searched word exists in any file notes, all found files are displayed on the **Search Results** page.

This lesson shows you how to search for content in the file notes.

1. Specify the Search Criteria for File Notes



The screenshot shows the 'upland FileBound Search' interface. The 'Project' dropdown is set to 'MGI AP Invoices'. The 'File Notes' field is highlighted with a red box and contains the text 'Approve'. The 'Search' button is also highlighted with a red box. Other search criteria include Invoice Number, Vendor, Invoice Date, Invoice Amount, PO Number, Department, Divider, and Separator. The 'Advanced Search Options' section is expanded.

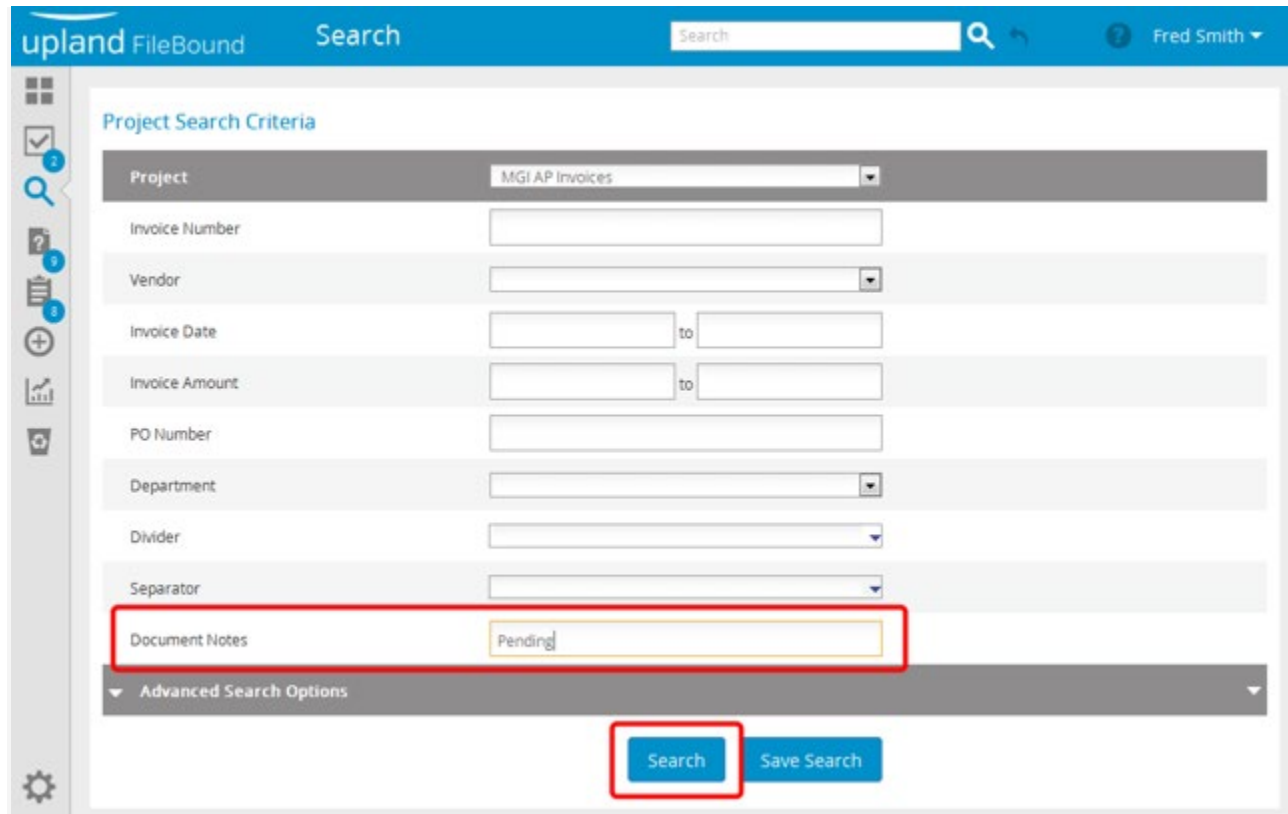
1. Specify the word that you want to search for within the file notes in the **File Notes** box.
Note: The **File Notes** box may be displayed within the **Advanced Search Options** based on the configuration set by the System Administrator.
2. Click **Search**.
The **Search Results** page opens for the file(s), which contains the specified word.

How do I search for content in the document notes?

You can search for files, based on the words in the document notes. Document notes are created for storing document related information using the **Viewer** within FileBound.

This lesson shows you how to search for content in the document notes.

1. Specify the Search Criteria for Document Notes



The screenshot shows the 'upland FileBound' search interface. The 'Project' dropdown is set to 'MGI AP Invoices'. The 'Document Notes' field is highlighted with a red box and contains the text 'Pending'. The 'Search' button is also highlighted with a red box. The interface includes a search bar at the top, a user profile 'Fred Smith', and a sidebar with navigation icons. The search criteria are listed as follows:

Field	Value
Project	MGI AP Invoices
Invoice Number	
Vendor	
Invoice Date	
Invoice Amount	
PO Number	
Department	
Divider	
Separator	
Document Notes	Pending

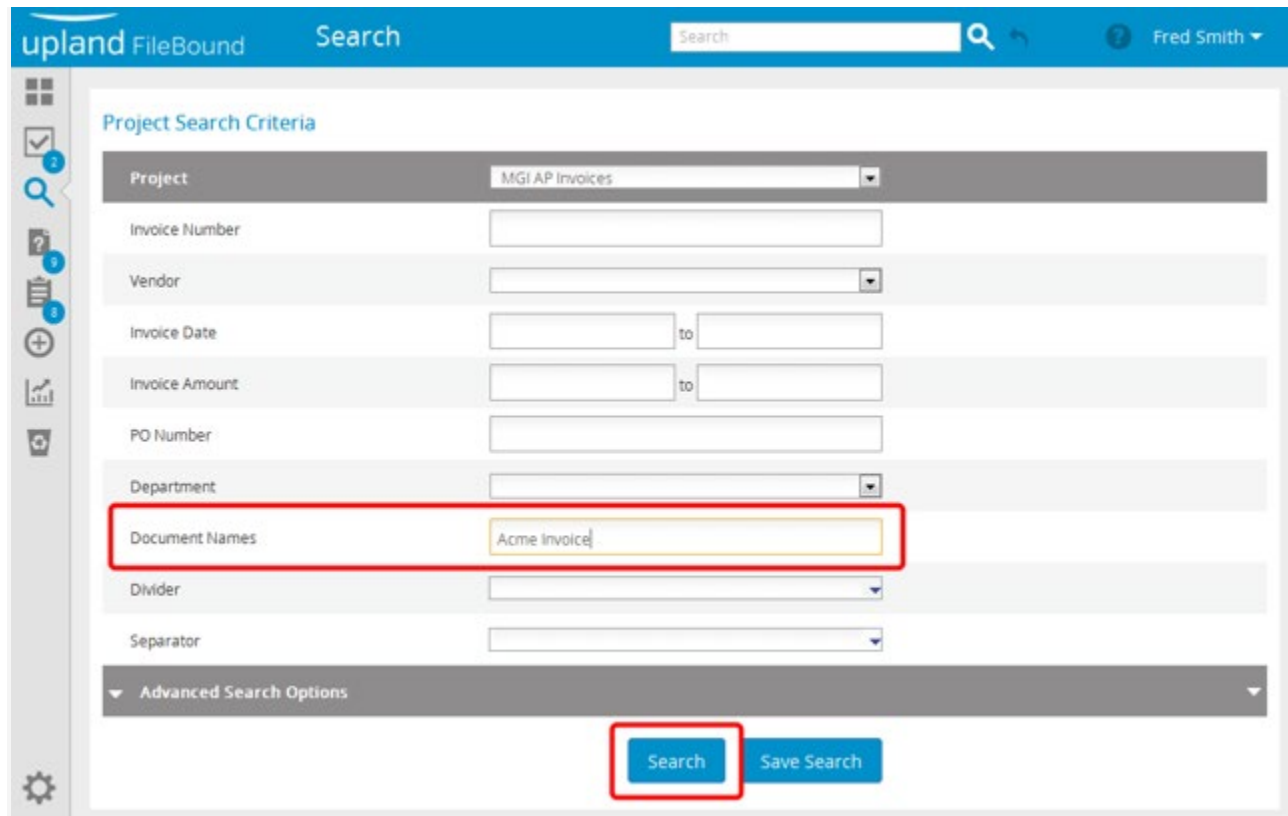
1. Specify the word that you want to search for within the document notes in the **Document Notes** box.
Note: The **Document Notes** box may be displayed within the **Advanced Search Options** based on the configuration set by the System Administrator.
2. Click **Search**.
The **Search Results Page** opens showing files, which contains the specified word in one of its document's notes.

How do I search for a document by name?

You can search for files, based on the names assigned to documents. Document names are the names that replace the default "Page 0001, Page 0002" names within the **Viewer**.

This lesson shows you how to search for documents by name.

1. Specify the Search Criteria for Document Name



The screenshot shows the 'upland FileBound' search interface. The 'Project' dropdown is set to 'MGI AP Invoices'. The 'Document Names' field is highlighted with a red box and contains the text 'Acme Invoice'. The 'Search' button is also highlighted with a red box.

1. Specify the word that you want to search in the **Document Names** box.
Note: The **Document Names** box may be displayed within the **Advanced Search Options** based on the configuration set by the System Administrator.
2. Click **Search**.
The **Viewer** opens showing documents of the file, which contains the specified page name.

How do I view documents listed in the Search Results?

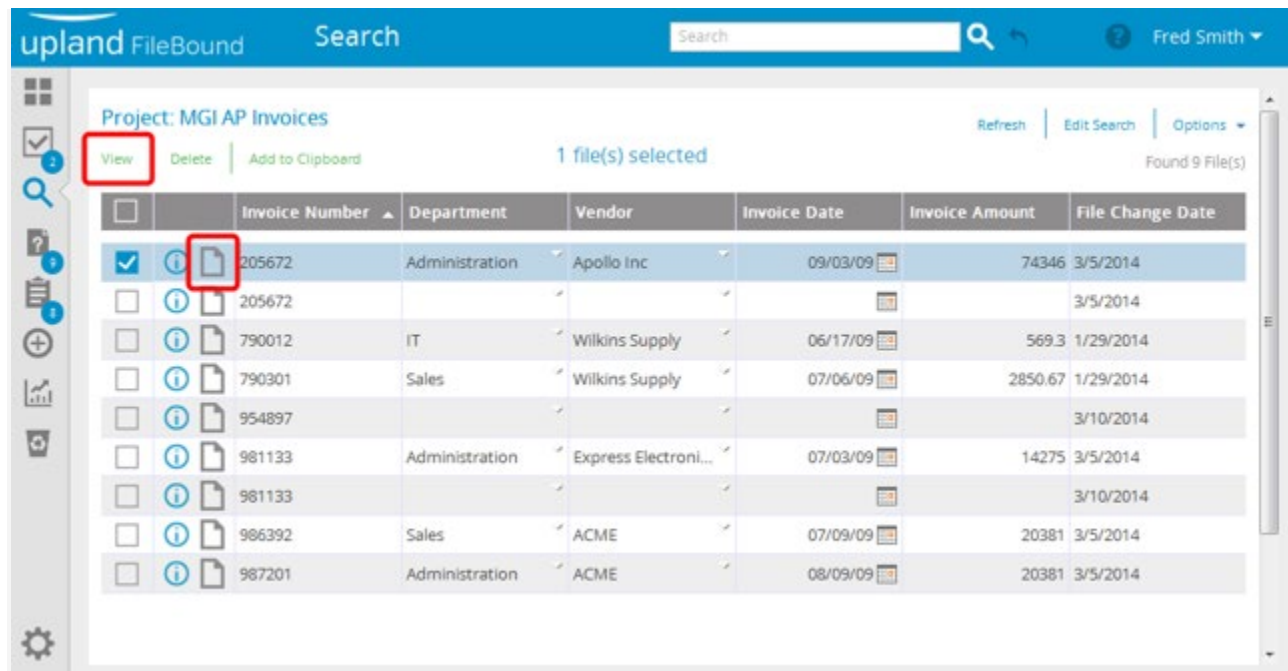
The **Search Results** page displays a list of files as search result.

For each file, index field values are displayed. For any FileBound project, an administrator can configure which index field values to be displayed on the **Search Result** page.










This lesson shows you how to view a document listed in the **Search Results** page.

Preferences, to display the documents for the single file using the default document viewer.

1. View a Document in the Search Results Page



The screenshot shows the upland FileBound Search interface. The top navigation bar includes the upland FileBound logo, a search bar, and the user name Fred Smith. The main content area displays a table of search results for the project "MGI AP Invoices". The table has columns for Invoice Number, Department, Vendor, Invoice Date, Invoice Amount, and File Change Date. The first row is selected, and the "View" button and a document icon are highlighted with red boxes. The table data is as follows:

		Invoice Number	Department	Vendor	Invoice Date	Invoice Amount	File Change Date
<input checked="" type="checkbox"/>		205672	Administration	Apollo Inc	09/03/09	74346	3/5/2014
<input type="checkbox"/>		205672					3/5/2014
<input type="checkbox"/>		790012	IT	Wilkins Supply	06/17/09	569.3	1/29/2014
<input type="checkbox"/>		790301	Sales	Wilkins Supply	07/06/09	2850.67	1/29/2014
<input type="checkbox"/>		954897					3/10/2014
<input type="checkbox"/>		981133	Administration	Express Electroni...	07/03/09	14275	3/5/2014
<input type="checkbox"/>		981133					3/10/2014
<input type="checkbox"/>		986392	Sales	ACME	07/09/09	20381	3/5/2014
<input type="checkbox"/>		987201	Administration	ACME	08/09/09	20381	3/5/2014

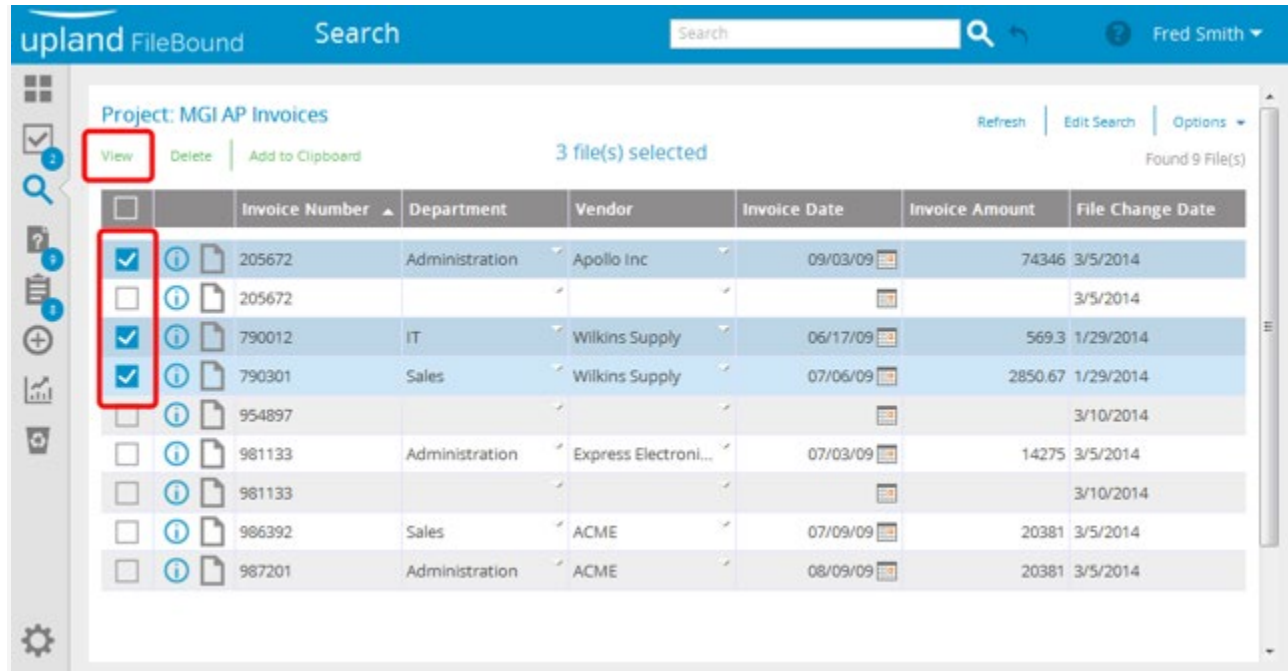
1. Click the view icon on any one of the files that you want to view.

Or,

Select the check box next to the file that you want to view.

2. Click **View**.
The selected file opens in the default viewer.

2. View Multiple Documents in the Search Results Page



The screenshot shows the 'upland FileBound Search' interface. At the top, there is a search bar and a user profile for 'Fred Smith'. Below the search bar, the project name 'Project: MGI AP Invoices' is displayed, along with '3 file(s) selected' and 'Found 9 File(s)'. A table of search results is shown with columns: Invoice Number, Department, Vendor, Invoice Date, Invoice Amount, and File Change Date. Three rows are selected, indicated by blue checkmarks in the first column. A red box highlights the 'View' button in the top left corner of the table area.

	Invoice Number	Department	Vendor	Invoice Date	Invoice Amount	File Change Date
<input checked="" type="checkbox"/>	205672	Administration	Apollo Inc	09/03/09	74346	3/5/2014
<input type="checkbox"/>	205672					3/5/2014
<input checked="" type="checkbox"/>	790012	IT	Wilkins Supply	06/17/09	569.3	1/29/2014
<input checked="" type="checkbox"/>	790301	Sales	Wilkins Supply	07/06/09	2850.67	1/29/2014
<input type="checkbox"/>	954897					3/10/2014
<input type="checkbox"/>	981133	Administration	Express Electroni...	07/03/09	14275	3/5/2014
<input type="checkbox"/>	981133					3/10/2014
<input type="checkbox"/>	986392	Sales	ACME	07/09/09	20381	3/5/2014
<input type="checkbox"/>	987201	Administration	ACME	08/09/09	20381	3/5/2014

1. Select the check boxes next to the files that you want to view.

Or,

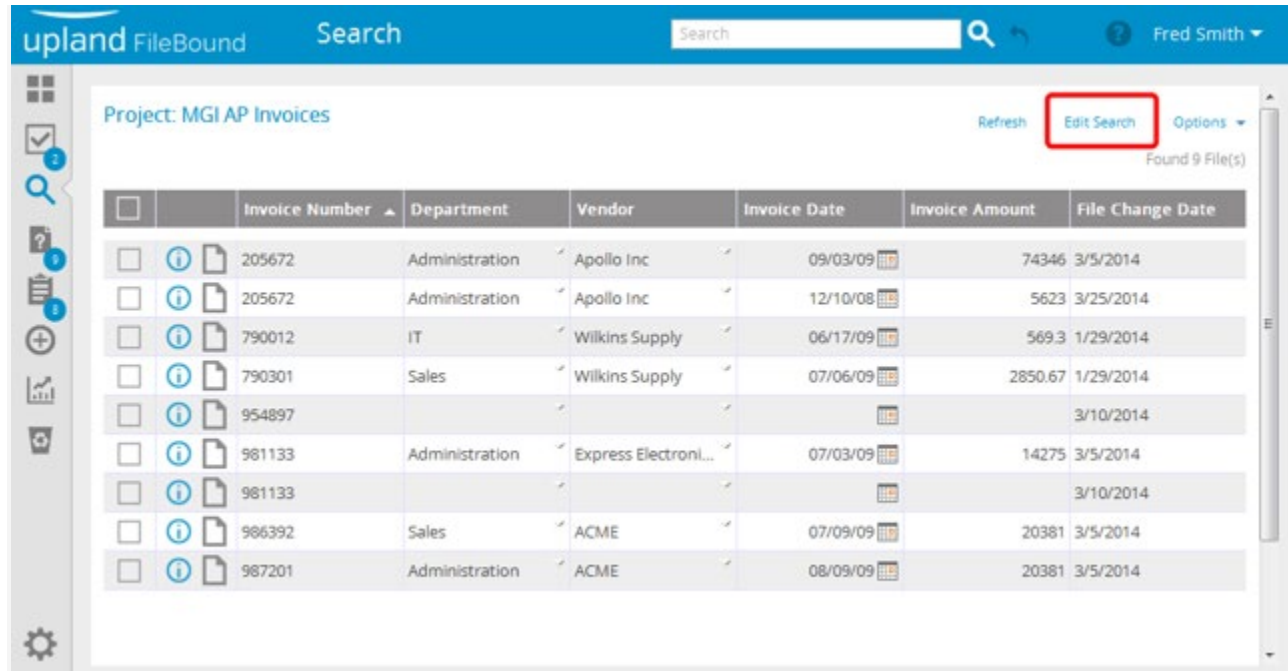
Select the check box on the column header, to select all the files listed in the **Search Results** page.

2. Click **View**.
The selected file opens in the default viewer.

How do I edit the search criteria for a search that was performed?

This lesson shows you how to edit the search criteria for a search that was performed.

1. Open the Edit Search Dialog Box

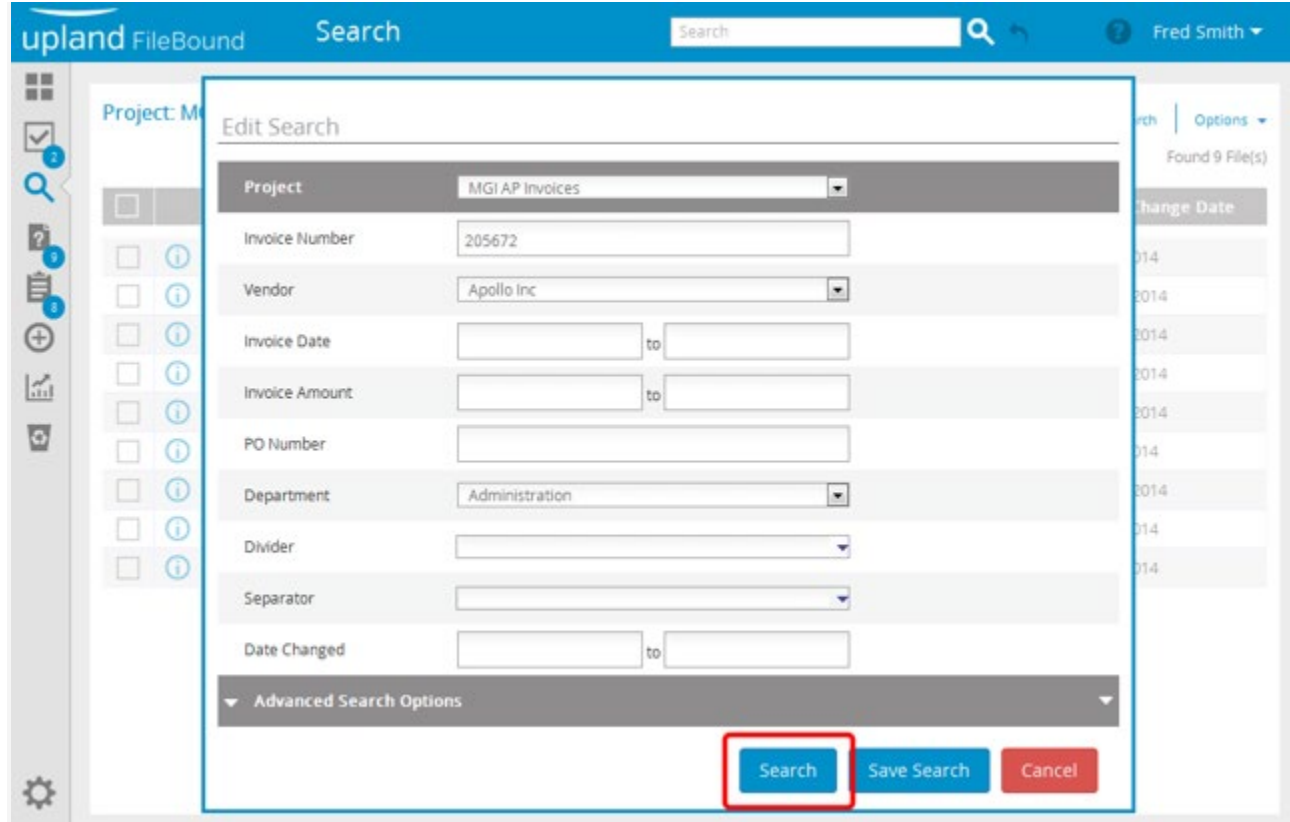


The screenshot shows the upland FileBound Search interface. The search results are displayed in a table with the following columns: Invoice Number, Department, Vendor, Invoice Date, Invoice Amount, and File Change Date. The 'Edit Search' button is highlighted with a red box.

	Invoice Number	Department	Vendor	Invoice Date	Invoice Amount	File Change Date
<input type="checkbox"/>	205672	Administration	Apollo Inc	09/03/09	74346	3/5/2014
<input type="checkbox"/>	205672	Administration	Apollo Inc	12/10/08	5623	3/25/2014
<input type="checkbox"/>	790012	IT	Wilkins Supply	06/17/09	569.3	1/29/2014
<input type="checkbox"/>	790301	Sales	Wilkins Supply	07/06/09	2850.67	1/29/2014
<input type="checkbox"/>	954897					3/10/2014
<input type="checkbox"/>	981133	Administration	Express Electroni...	07/03/09	14275	3/5/2014
<input type="checkbox"/>	981133					3/10/2014
<input type="checkbox"/>	986392	Sales	ACME	07/09/09	20381	3/5/2014
<input type="checkbox"/>	987201	Administration	ACME	08/09/09	20381	3/5/2014

1. Click **Edit Search** within the **Search Results** page.
The **Edit Search** dialog box opens displaying the current search criteria.

2. Edit the Search Criteria

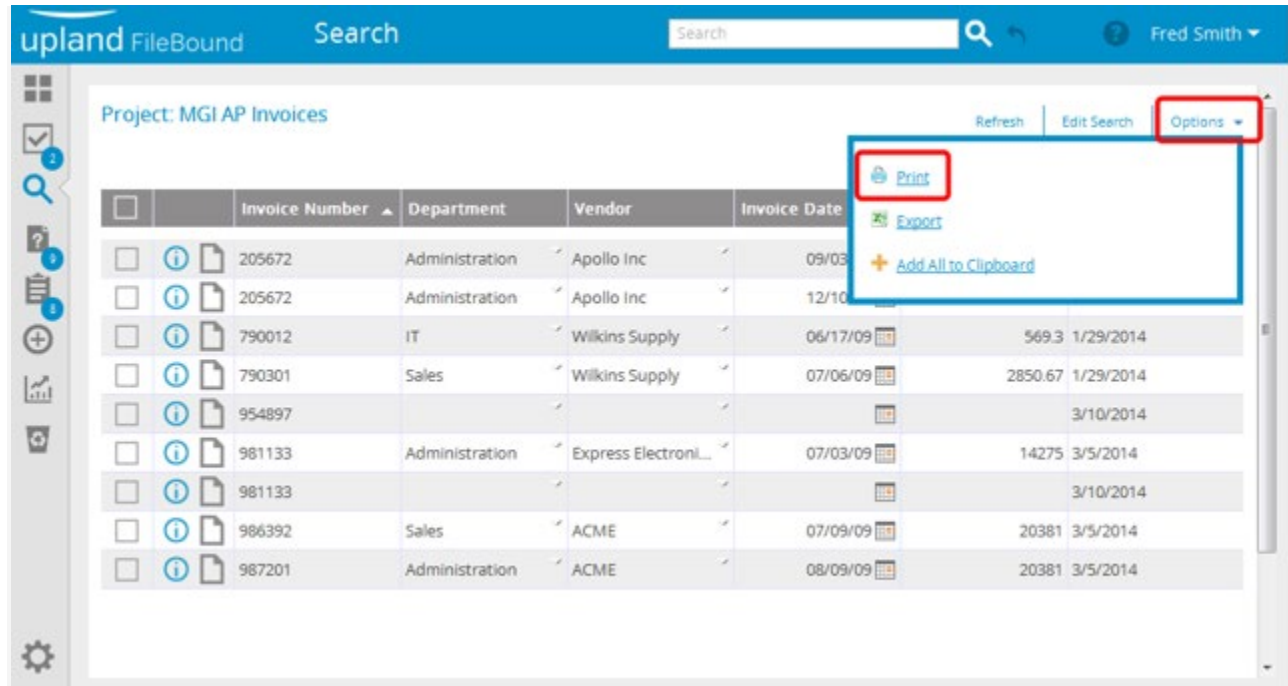
A screenshot of the upland FileBound search interface. The main window has a blue header with the 'upland FileBound' logo, a search bar, and the user name 'Fred Smith'. A central dialog box titled 'Edit Search' is open, containing various search criteria fields. The 'Project' field is set to 'MGI AP Invoices', 'Invoice Number' to '205672', and 'Vendor' to 'Apollo Inc'. Other fields include 'Invoice Date', 'Invoice Amount', 'PO Number', 'Department' (set to 'Administration'), 'Divider', 'Separator', and 'Date Changed'. At the bottom of the dialog, there are three buttons: 'Search' (highlighted with a red box), 'Save Search', and 'Cancel'. To the right of the dialog, a sidebar shows search results for '2014' with a 'Change Date' option.

1. Specify the new search criteria.
2. Click **Search**.

How do I print the list of search results?

This lesson shows you how to print the list of search results.

1. Print the Search Results



The screenshot shows the 'upland FileBound Search' interface. The page title is 'Project: MGI AP Invoices'. The search bar contains 'Fred Smith'. The table below lists search results with columns for Invoice Number, Department, Vendor, and Invoice Date. An 'Options' menu is open, showing 'Print', 'Export', and 'Add All to Clipboard' options. The 'Print' option is highlighted with a red box.

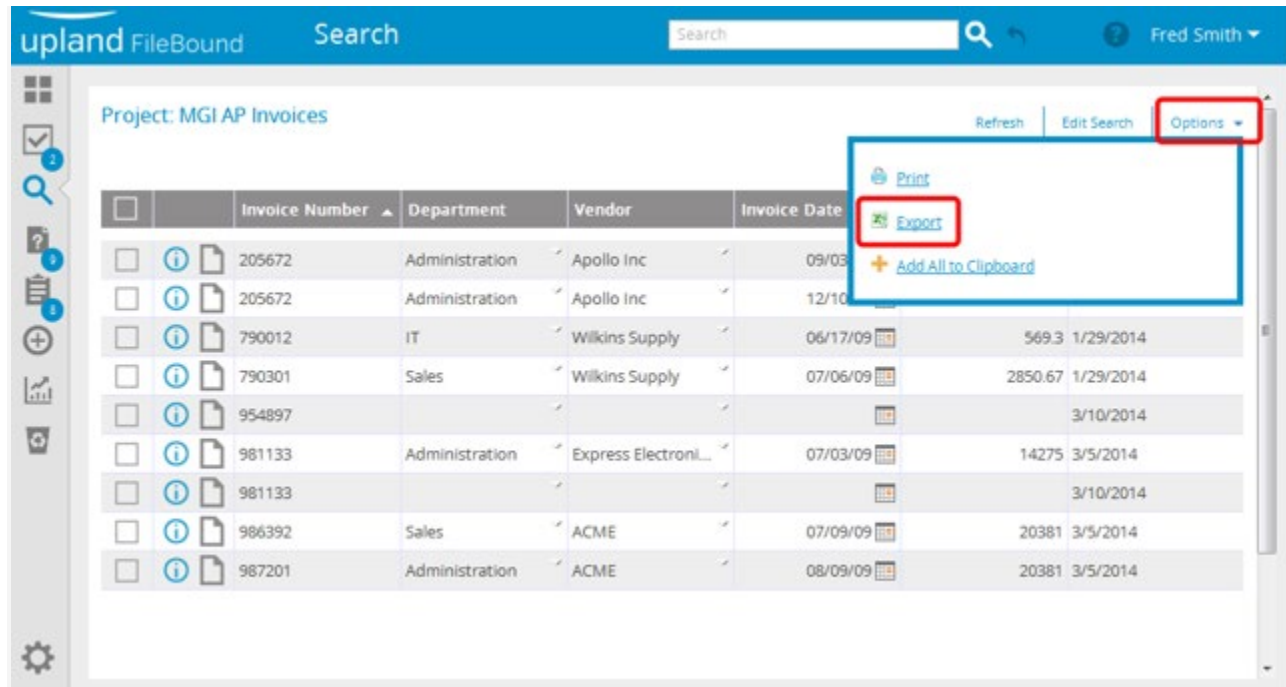
	Invoice Number	Department	Vendor	Invoice Date
<input type="checkbox"/>	205672	Administration	Apollo Inc	09/03/09
<input type="checkbox"/>	205672	Administration	Apollo Inc	12/10/09
<input type="checkbox"/>	790012	IT	Wilkins Supply	06/17/09
<input type="checkbox"/>	790301	Sales	Wilkins Supply	07/06/09
<input type="checkbox"/>	954897			
<input type="checkbox"/>	981133	Administration	Express ElectronL...	07/03/09
<input type="checkbox"/>	981133			
<input type="checkbox"/>	986392	Sales	ACME	07/09/09
<input type="checkbox"/>	987201	Administration	ACME	08/09/09

- Click **Print** from the **Options** menu within the **Search Results** page.

How do I export the search results to Microsoft Excel?

FileBound allows you to export data to a file. You can export index information of files, to a sheet in Microsoft Excel or a CSV File. This lesson shows you how to export the search results to Microsoft Excel.

1. Open the Export List Dialog Box

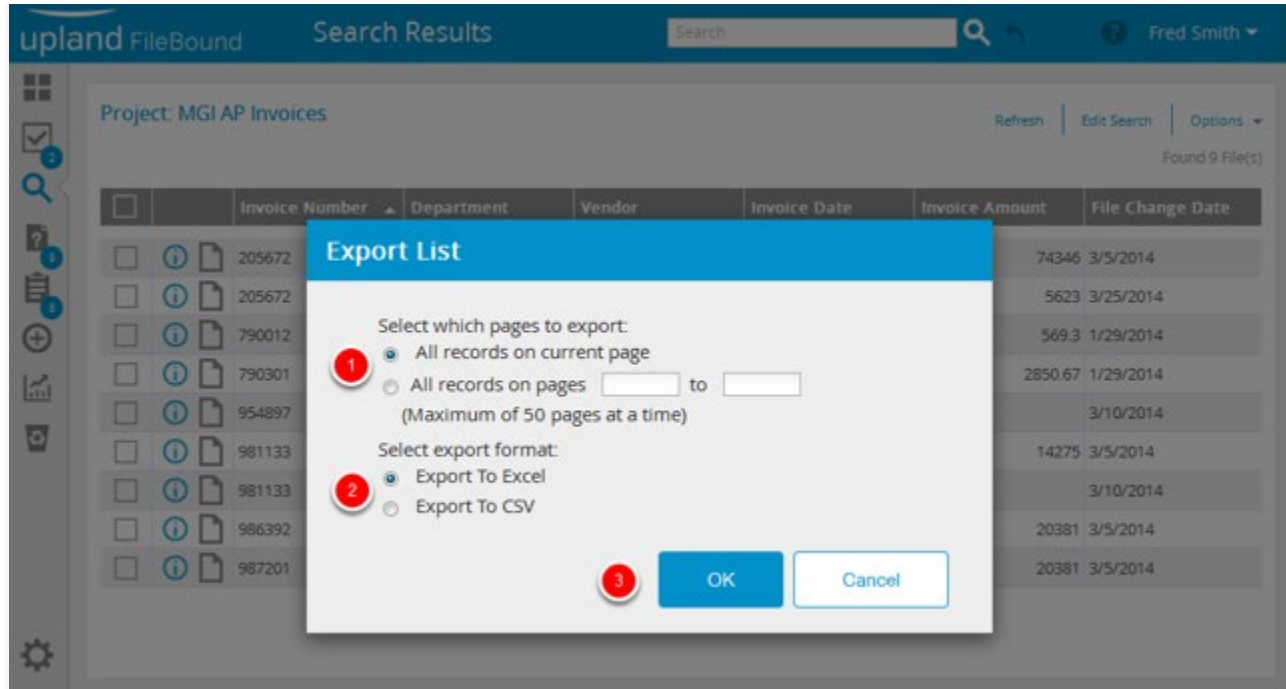


The screenshot shows the 'upland FileBound' interface. At the top, there is a search bar and a user profile for 'Fred Smith'. Below the search bar, the page title is 'Project: MGI AP Invoices'. A table of search results is displayed with columns for Invoice Number, Department, Vendor, and Invoice Date. An 'Options' dropdown menu is open, showing 'Print', 'Export', and 'Add All to Clipboard' options. The 'Export' option is highlighted with a red box.

Invoice Number	Department	Vendor	Invoice Date
205672	Administration	Apollo Inc	09/03
205672	Administration	Apollo Inc	12/10
790012	IT	Wilkins Supply	06/17/09
790301	Sales	Wilkins Supply	07/06/09
954897			
981133	Administration	Express ElectronL...	07/03/09
981133			
986392	Sales	ACME	07/09/09
987201	Administration	ACME	08/09/09

- Click **Export** from the **Options** menu within the **Search Results** page. The **Export List** dialog box opens.

2. Select the Records to Export



1. You can select the **All records on current page** option to export information of all the files that are displayed on the current page.

Or,

You can select the **All records on pages** option to export information of files that are displayed on the page range that you specify.

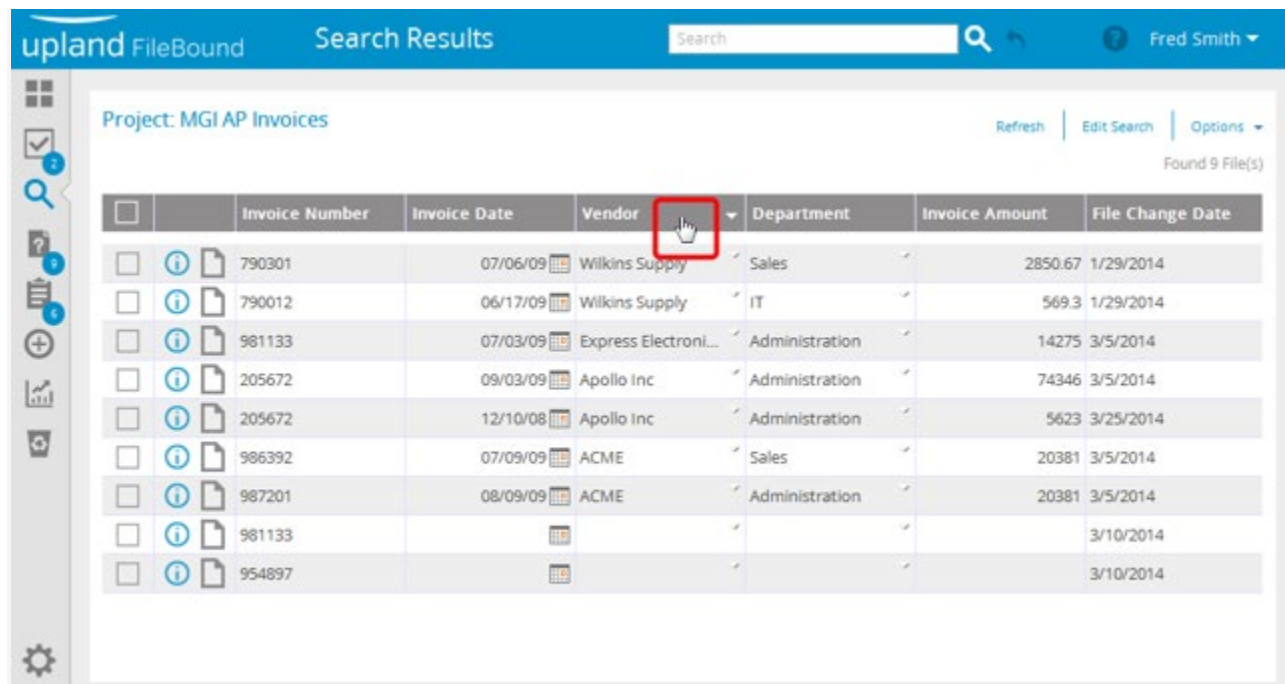
Note: You can export a maximum of 50 pages at one time.

2. Select **Export to Excel**.
3. Click **OK**.

How do I sort search results again using a different column heading?

FileBound allows you to sort the search results using the columns displayed in the **Search Results** page. By default, the items in the search results list are sorted based on the first column displayed in the **Search Results** page. This lesson shows you how to re-sort search results using a different column heading.

1. Sort the Search Results



The screenshot shows the 'upland FileBound Search Results' interface. The page title is 'Project: MGI AP Invoices'. The search bar contains 'Search' and the user is logged in as 'Fred Smith'. The table displays 9 files with the following columns: Invoice Number, Invoice Date, Vendor, Department, Invoice Amount, and File Change Date. The 'Vendor' column heading is highlighted with a red box and a mouse cursor, indicating it is being clicked to sort the results.

		Invoice Number	Invoice Date	Vendor	Department	Invoice Amount	File Change Date
<input type="checkbox"/>		790301	07/06/09	Wilkins Supply	Sales	2850.67	1/29/2014
<input type="checkbox"/>		790012	06/17/09	Wilkins Supply	IT	569.3	1/29/2014
<input type="checkbox"/>		981133	07/03/09	Express Electron...	Administration	14275	3/5/2014
<input type="checkbox"/>		205672	09/03/09	Apollo Inc	Administration	74346	3/5/2014
<input type="checkbox"/>		205672	12/10/08	Apollo Inc	Administration	5623	3/25/2014
<input type="checkbox"/>		986392	07/09/09	ACME	Sales	20381	3/5/2014
<input type="checkbox"/>		987201	08/09/09	ACME	Administration	20381	3/5/2014
<input type="checkbox"/>		981133					3/10/2014
<input type="checkbox"/>		954897					3/10/2014

- Click a column heading, to sort the search results using that column.