

How to Search

Searching for Archived Documents

Documents must first be archived in **fileSMART Archive** before performing a search to locate them. The search is made using the Search Labels which are the same as the Archive Labels used for archiving.

When your documents have been archived you will be able to search for them at any time.

Follow these steps to search for archived documents in fileSMART:

1. Click the *Mode* button to switch to search mode:



- 2. Choose the *Archive Folder* you wish to search from.
- 3. Enter information into at least one of the Search Labels:
- Select a *Prop Code* if you are looking for documents just for a particular property.
- Select a *Doc Type* if you are searching for a specific type of document Tenancy Agreement in this example.
- Select a *Date From* and a *Date To* if you are looking for documents from a specific date or date range.

Search View		
Prop Code	BEACH96	
Address		
Owner		
Tenant		
Manager		
OCode		
TCode		
Doc Type	Tenancy Agreement	
Date From	1/03/2014	
Date To	05/04/2014	
Notes		_
Show on Portals	Owner Tenant	
Document ID		_
User Name	-	
Archive Date From	Not Specified	
Archive Date To	Not Specified	

Note: The more labels that are used in the search the more specific the search is and the fewer documents will be returned. Use fewer labels to broaden your search

4. Select the Search Archived Documents button or press Enter.

This will produce a *Found Documents* list, which may contain the specific document sought, or a number of similar documents containing the same information supplied in the search criteria.

5. Click on any document in the Found Documents list to display it in the Document View panel

	Date	Dec Type	Prog Code	Address	Owner	Terat	Rotes	Show on Potals	Harager	OCade
•	1.54.0014									
	5/54/2014	Invoices	8EACH95	Milleach Street	Calm Fath	Give Over	Council Rates	Owner	OK.	FRITH
	5/54/2014	Invoices	8EAC-05	N Geach Street	Cale Reh	Chue Over		Owner, Terrant	CK	FRITH

- Multiple items can be selected in the Found Documents list by holding down the shift key and clicking on the desired items.
- Or use the control key to select multiple items that are not touching each other.
- 6. To clear all search labels press 'F5'.

Sorting the Found Documents List

You can sort the Found Documents list by any one of the columns – click on the column

heading and it will be sorted in ascending order – click again and it will be sorted in descending order.

List loc	ol										
ents		Date 👻	Doc Type	Prop Code	Address	Owner	Tenant	Notes	Show on Portals	Manager	OCode
8		5/04/2014	Invoices	BEACH96	96 Beach Street	Colin Firth	Clive Owen	Council Rates	Owner	СК	FIRTH
å		5/04/2014	Invoices	ARCH34	34 Archer Street	Patrick Dempsey	Heather Locklear	Water Rates	Owner, Tenant	СК	DEMPSEYP
		5/04/2014	Invoices	BAY23/04	4/23 Bay Street	Sharon Stone	Brad Pitt & Angelina Jolie	Water Rates	Owner, Tenant	СК	STONE
		5/04/2014	Invoices	WARA10/1	1 / 10 Waratah Street	Mr Harrison Ford	Ms Cathy Freeman		Owner, Tenant	СК	FORDH
		5/04/2014	Invoices	BEACH96	96 Beach Street	Colin Firth	Clive Owen		Owner, Tenant	СК	FIRTH
		5/04/2014	Notice - Breach	LOUISA16/7	7/16 Louisa Road	Mr Daniel Craig	Jessica Alba		Owner, Tenant	LX	CRAIGD
		4/04/2014	Correspondence - Tenant	ARCH34	34 Archer Street	Patrick Dempsey	Heather Locklear	email re: repair to shower screen		СК	DEMPSEYP

In this example, the list is sorted by ascending Date order.

Retrieving an Archived Email

You can search for archived emails in fileSMART Archive as you would any other document. The email is displayed in HTML format without any embedded graphics using the built-in viewer.

Follow these steps to retrieve an archived email:

1. Search for the email by entering your search criteria in the search labels:

a some	2	0	3	-	9		7 🤮	3	0			2	0
naries and Folds	-												
Autora Falder Main Garan File File Sate Sate	diamarts sa (Manapanant)		From To: Subject: Distance His There	State 3 - Re	bulado car ar' o car							Sec \$753	EQ1144
auth View					a repair person to fix in have perished and no		Cnex						
arch View sp Cade			Thanks,	ins seemed to	have persied and ne	eo repacing							
iteres			Love tro	m Heather Lo	cklear sox								
		-											
arar													
ener met													
erart erart brager													
erer erert brager Code													
eraer eraert brager Code		-											
erær erætt Gode Gode	4/54/2014												
ener mager Sole Sole	404/2014 Ref Sector												
mar magar Jode Lode Li Type Li Type Li Type Li Type			Lat Taur										
rver rvert Sole Sole E Tope Er To Ere	Not Specified		Cost Your	Dans	Dec Taxe	Prop Cardie	Address	Oner	Terret	has	Shew on Particle	Terape	Cole
ener ment Solos Solos et Type te Fran	No Specified		List Tool	Dee: 5-04/2014	Det Tiger Protices	Pag Case AlDrid	Address 34 Autor Scient	Denar Patrak Dengony	Tenen Heather Lobies	Yone Mar Pare	Store on Patale Owner, Farant	Renge OX	
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The email displays in the found documents list.

Clicking on the attachment link (as shown in the picture above) will open the attachment using the default program to open it.

2. You can also open the email in its native format (provided you have Microsoft Outlook



installed) by clicking the *Email Documents* button.

The email in an Outlook message window, complete with any attachments will open. The message can then be forwarded on to email recipients and a copy will be saved to

your Outlook sent items folder.

Note: To print the email, you will need to open it in Outlook format and use the File ->Print option. At this stage you cannot print the email from withinfileSMARTArchive using the Print Documents buttonfileSMART

Functions within Search Mode

When you have located the document(s) you require, you can then use the following functions:

Email Documents

Follow these steps to Email a found document:

- 1. Click on the required document in the Found Documents list.
- 2. To select multiple documents use the Shift key or the CTRL keys on your keyboard.
- 3. Click the *Email Document(s)* button in the Control Panel.

Print Documents

Follow these steps to print a found document:

- 1. Click on the required document in the Found Documents list.
- 2. To select multiple documents use the Shift key or the CTRL keys on your keyboard.
- 3. Click the *Print Documents* button in the Control Panel (This printer prints out ALL

pages of the document)



- 4. Or click the print button in the Document View Toolbar
- Only one document can be printed at a time with this button.
- You can select which pages are to be printed.
- Annotations will be printed. If you do not want the annotations to print, turn them off before clicking on the print button.
- 5. Select the required printer and click Print.

Edit Archive Labels

Follow these steps to Edit Archive Labels:

- 1. Click on the required document in the Found Documents List
- 2. Click the *Edit Button*.





3. Change the Archive Labels as required e.g., by selecting a different Address or Property Code:

Prop Code	BAY23/04	~	Doc Type	Inspection Report - Routine	~
Address	4/23 Bay Street	¥	Date	16/06/2015	~
Owner	Sharon Stone	¥	Notes		
Tenant	Brad Pitt & Angelina Jolie	¥			
Manager	LX	~	Show on Portals	Owner	
Code	STONE	v		Tenant	
TCode	PITTB	~			

4. Click the OK button to save the changes or click the Cancel button to ignore the changes.

Bulk Edit Multiple Documents

If you have Bulk Edit permission then you will be able to edit multiple documents at the same time. This is useful if you need to change labels for many documents from one criteria to another.

For example, you might like to publish all Owner Invoices currently archived in fileSMART to the Owners Portals

Follow these steps to Bulk Edit Multiple Documents:

- 1. Click on the required document in the Found Documents List.
- 2. Select multiple documents using the Shift key or the CTRL keys on your keyboard.
- 3. Click the *Edit* button. The bulk edit screen displays:

Prop Code	*	Doc Type		*
Address		📄 Date	Not Specified	-
Owner		Motes		
Tenant				
Manager		Show on	0wner	
OCode		Portals	Tenant	
TCode				

- 4. Select the boxes for the labels you need to edit.
- 5. Edit the required labels, e.g. Show on Portals.
- 6. Select OK.

A prompt will display confirming the update of data for multiple documents:

Warning			
	You are about to upd Are you sure you wan	ate the data for multip it to continue?	le documents.
		Yes	No

Delete Archived Documents

Only users set with a delete security level can delete archived documents.

Follow these steps to Delete an Archived Document:

- 1. Click on the required document in the Found Documents list.
- 2. Select multiple documents using the Shift key or the CTRL keys on your keyboard.
- 3. Select the *Delete* button.

Note: Deleted documents can only be recovered by Rockend fileSMART Support (1300

Attach Pages to Archived Documents

TIFF documents that have already been archived can have other TIFF documents attached to them if required.

This function will only work for files that are in a TIFF format.

Follow these steps to Attach Pages to an Archived Document:

- 1. Click on the required document in the Found Documents list.
- 2. Click the *Attach* button.



3. The documents in your Pending Queue will appear in a separate window:

		File Name	File Date
0		ASP0027201	7/11/2013 5
	10	ASP0027201	7/11/2013 5
		ASP0027201	7/11/2013 5
	100	ASP0027201	7/11/2013 5
	23	ASP0027201	7/11/2013 5
	123	ASP0027201	7/11/2013 5
	10	ASP0027201	7/11/2013 5
	10	ASP0027201	7/11/2013 5
	121	ASP0027201	7/11/2013 5
	123	ASP0027201	7/11/2013 5
	123	ASP0027201	7/11/2013 5
	123	ASP0027201	7/11/2013 5
	123	ASP0027201	7/11/2013 5
	123	ASP0027201	7/11/2013 5
	83	ASP0027201	7/11/2013 5
	23	ASP0027201	7/11/2013 5
	123	ASP0027201	7/11/2013 5
	1	ASP0027201	7/11/2013 5
	13	ASP0027201	7/11/2013 5

4. Select the documents you wish to attach by clicking in the box to their left.

5. Select the **Remove Originals** checkbox to delete the selected items from your Pending Queue after they are attached, or deselect it to leave copies of the attached documents in your Pending Queue.

6. Click OK and the selected documents will attach after the last page of the archived document.

Copy Documents

Archived documents can be copied to any desired location on your computer or network.

Follow these steps to Copy Archived Documents:

- 1. Click on the required document in the Found Documents list.
- 2. Select multiple documents using the Shift key or the CTRL keys on your keyboard.
- 3. Click the *Copy* button.
- 4. Choose the location for saving the copied document(s).
- 5. Click OK.

Share Documents

fileSMART Share allows you to export found documents to a portable media (CD/DVD/USB).

The documents are contained on the portable media within a 'lite' version of fileSMART which the recipient can then use to search for then view or print the documents.

Follow these steps to Share Documents:

- 1. Click on the required document in the Found Documents list.
- 2. Select multiple documents using the Shift key or the CTRL keys on your keyboard.

To select ALL the documents, click in the top-left cell of the Found Documents panel:

Date	 Doo Type 	Prop Code	Address	Owner	Terart	Notes	Show on Portals	Manager	OCode
5/04/2014	Invoices	BEACH06	56 Beach Street	Calm Refs	Ove Oven	Council Rates	Owner		
5/04/2014			34 Author Street		Heather Lacklear				
5/04/2014				Sharon Stone	Brad Pitt & Angeline Jole				
5/04/2014			1 / 10 Wantah Street	Mr Hamson Ford					
5/04/2014			95 Beach Street						
5/04/2014	Notice - Breach								
4/04/2014	Correspondence - Tenan		34 Archer Street	Patrick Dempsey	Heather Locklear	enal is repair to shower screen			DEMPSEY

- 3. Click the **Share** button on the toolbar.
- 4. The Export Wizard will display.
- 5. Select Next.
- 6. Select the location you would like to export to:

8		Export To fileSt	MART Share		-	• ×
Select Media Device Please select the correct	t device to save or burn the	export to.				
	How do you want to san					
	O Burn To Disc:	Select Device:	v			
			< Back	Next >	Cancel	Help

7. Select Next.

8. Confirm you wish to create the file by clicking Create fileSMART Share:

-					
	izard is now ready to create fileSMAR				
your r	e click "Create fileSMART Share" to b peofied destination. Once this proces etc. When the process is complete, o	a stats, it cannot be can	ents and associated prog celled so please wait for	pama to 8 to	
fyou	wish to cancel this wizard without pro-	ceeding, click "Cancel".			
Please	vat				
		_			
			Create fileSMART Shar		

- 9. Select *Finish* to exit the wizard.
- 10. You can now use the fileSMART Share CD/DVD/USB to distribute documents to other parties.

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