Universal Search and Holds Module
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CHAPTER 1
Introduction

What you will learn in this chapter:
- How to navigate the Search module
- How to specify a search Scope
General

The Universal Search Module was designed to perform “one-stop-searching”. Once your search criteria has been defined, the Universal Search Module simultaneously searches the text data fields on the Client, Matter, Boxes, Files, Documents, and Related Party Forms for entries that match your search criteria. After completing a search, you can view details about the items that matched your search criteria, filter results, generate reports and view the associated electronic Documents. The Full Search desktop, depicted in Figure 1-1, is used to perform these functions.

![Full Search Desktop](image)

**Figure 1-1  Full Search Desktop**

### Search Form Overview

The Universal Search Module uses two areas to construct a search. They are:

<table>
<thead>
<tr>
<th>AREA</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scope</td>
<td>Used to specify where the Universal Search Module is to search (which Form and specific text data field)</td>
</tr>
<tr>
<td>Pattern</td>
<td>Used to specify search criteria (words or phrases used in search)</td>
</tr>
</tbody>
</table>

### Scope

The *Scope* area, depicted in Figure 1-2, is used to specify the Forms and text fields used in your search. You can choose any one, combination or all of the areas listed when conducting a search:
Search Scope Data Fields:

The following data fields may be used to specify the areas of the FileSurf database to be searched:

<table>
<thead>
<tr>
<th>SEARCH AREA</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Name</td>
<td>Names of all Clients entered in the system</td>
</tr>
<tr>
<td>Client Notes</td>
<td>Notes (abstract) about a client</td>
</tr>
<tr>
<td>Matter Name</td>
<td>Names of all Matters entered in the system</td>
</tr>
<tr>
<td>Matter Description</td>
<td>Descriptive information about a Matter</td>
</tr>
<tr>
<td>Matter Notes</td>
<td>Notes (abstract) about a Matter</td>
</tr>
<tr>
<td>Folder Title</td>
<td>Descriptive title of Folder</td>
</tr>
<tr>
<td>Folder Notes</td>
<td>Notes (abstract) about a Folder</td>
</tr>
<tr>
<td>Document Subject</td>
<td>Short narrative of Document</td>
</tr>
<tr>
<td>Document Content</td>
<td>Descriptive information about Document contents</td>
</tr>
<tr>
<td>Box Name</td>
<td>Descriptive title of Box</td>
</tr>
<tr>
<td>Box Description</td>
<td>Short narrative of Box</td>
</tr>
<tr>
<td>Saved Search Name</td>
<td>User-assigned name to previously saved search</td>
</tr>
<tr>
<td>Saved Search Notes</td>
<td>Notes (abstract) about a previously saved search</td>
</tr>
<tr>
<td>Saved Search Pattern</td>
<td>Criteria from a Saved Search</td>
</tr>
<tr>
<td>InterAction Name</td>
<td>Name in contact management database</td>
</tr>
</tbody>
</table>
Specify a search Scope:

- Click the **Scope** link, depicted in Figure 1-3, to display the pre-defined (default) search scope. You may modify your scope by marking or unmarking any of the ballot boxes. Your search scope will be retained for use on future searches until you
  - Clear your search
  - Create a New search
    OR
  - Exit the search module

![Figure 1-3 Specify Search Scope](image)

**Pattern**

The *Patterns* section, depicted in Figure 1-4, is used to enter search criteria. A *Pattern* can consist of letters, numbers and spaces in any combination. You can specify one or more Patterns per search. As you type your Pattern, the Universal Search Module will convert all letters to uppercase. During the search, no distinction will be made between upper and lower case letters.

![Figure 1-4 Pattern](image)
CHAPTER 2
Search Tools

What you will learn in this chapter
- How to enter search Patterns
- Search tools
General

This chapter describes the Patterns section and the various search tools you can use when entering a search Pattern. As you type your Pattern, the Universal Search Module will convert all letters to uppercase. During the search, no distinction will be made between upper and lower case letters.

Operators

Use the OR connector in a search to connect two expressions, at least one of which must be found in your search results. For example, real estate or real property would retrieve any objects that contained real estate, real property or both.

- There are several ways to create an OR Pattern. The two most common uses are outlined below:
  - Enter the first word or phrase
  - Type “or” (no quotation marks)
  - Enter the second word or phrase
- Alternatively, enter the first word or phrase, then
- Press Enter on your keyboard. A second line in the search Pattern implies an Or search.

Noise words (a, the, is, etc.) and search operators such as AND, NOT and OR are ignored.

And

Use the AND connector in a search to connect two expressions, both of which must be found in your search results. For example: apple and pear would retrieve any object that contained both words. You may also use the AND operator to connect two phrases. For example: hot apple pie and poached pear would retrieve any object that contained both expressions.

Not

Use NOT in front of any search expression to reverse its meaning. This allows you to exclude objects from a search. For example steamed apples and not pear will find any objects containing the phrase steamed apples, except those that also contain pear.

WARNING! NOT standing alone can be the start of a search request. For example, “not pear” would retrieve all objects that did not contain pear. This is NEVER the preferred search Pattern as it can produce search results containing the majority of records in your database! The preferred method is ALWAYS to use NOT as a connector of two words or phrases (see example in previous paragraph).

When formulating a NOT Pattern, we recommend first entering the inclusive word or phrase first. You will need to use either AND or OR connector with NOT.

- For example:
  - apple or not pear
  - pear and not apple
**Stem**

Stemming extends a search to cover grammatical variations on a word. For example, a search for *fish* would also find *fishing*. A search for *applied* would also find *applying*, *applies* and *apply*.

- To add stemming to your searches:
  - Enter root (stem) word followed by `~`
  - For example, “hold~” (no quotation marks) finds *holding* and *holder*

**Wildcards**

To make Pattern searches more valuable, you may use Wildcards to add flexibility to your search criteria. Wildcard characters allow you to enter general, rather than exact specifications for matching. A Pattern can contain the wildcard characters “*” and “?” (no quotation marks). A “?” takes the place of a single unknown character; an “*” matches one or more unknown characters. The wildcard characters can be in any position in a word.

- For example:
  - Al?x finds Alax, Alex
  - M*Gregor finds McGregor, MacGregor, Maggregor

**Tip:** Wildcards should always be preceded by at least one character! Starting an expression with a wildcard can add an immeasurable amount of time to the search.

**Fuzzy**

Fuzzy searching will find a word even if it is misspelled. Fuzzy searching can be useful when you are searching text that may contain typographical errors or for text that has been scanned using optical character recognition (OCR).

- There are two ways to add fuzziness to searches:
  - Use the “%” (no quotation marks) in place of each unknown/misspelled character positioned anywhere between % and the end of the word
  - For example, a fuzzy search for *ap%pe* will find *apple*
- The second method for adding Fuzziness to a search is to mark the Fuzzy ballot box in the toolbar depicted in Figure 2-1 prior to entering a search Pattern.
Phonics

Phonics searching looks for a word that sounds like the word you are searching for and begins with the same letter.

- To add Phonics searching to a Pattern, enter # before the search word
  - For example, #Smith will also find Smithe and Smythe.

Synonymy

Synonymy is used like a Thesaurus to include words or phrases in your search results that have the same meaning as those defined in your search Pattern. Your Systems Administrator will create a list of synonyms in the system for search purposes. A common use for this feature is to spell out an acronym (e.g., ABC and Alpha Beta Company) or abbreviate a long word or phrase (e.g., International Business Machines and IBM).

- To add Synonymy to a Pattern, simply mark the Synonymy ballot box on the toolbar

Within

Use the W/N connector in a search to specify that one word or phrase must occur within N words of the other. For example, apple w/5 pear would find matches that contained apple within 5 words of pear. In the following examples of Within search Patterns, parentheses are used to group words together.

- (apple or pear) w/5 banana
- (apple w/5 banana) w/10 pear
- (apple and banana) w/10 pear

**Not Within**

The *NOT W/N* operator allows you to search for a word or phrase not in association with another word or phrase.

- apple not w/20 pear

Unlike the *W/N* operator, *NOT W/N* is not symmetrical. That is, *apple not w/20 pear* is not the same as *pear not w/20 apple*. In the *apple not w/20 pear* example, the Universal Search Module searches for *apple* and excludes cases where *apple* is too close to *pear*. In the *pear not w/20 apple* example, the Universal Search Module searches for *pear* and excludes cases where *pear* is too close to *apple*. 
CHAPTER 3
Search Results

What you will learn in this chapter:
- Working with search results
- How to filter search results
- Place search results on Hold
General

The Universal Search Module provides a number of options for working with search results. You may generate printable reports or filter your search results to exclude results from a report.

Filter Search Results

- Perform a search
- Select an item in the hit list and press the Spacebar on your keyboard to prevent it from appearing in reports
  Or
- Select an item on the hit list, right-mouse click and select Exclude

Tips: When you delete an item from the hit list, the item is not being deleted from the FileSurf database, just from the hit list.

Place Item on Hold

- Click the Hold icon to display Holds pick list depicted in Figure 3-1

![Choose Legal Hold](image)

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>002</td>
<td>Cornelius Discovery</td>
</tr>
<tr>
<td>003</td>
<td>Halston Discovery</td>
</tr>
<tr>
<td>001</td>
<td>legal investigation</td>
</tr>
<tr>
<td>005</td>
<td>Webster 1998 Audit</td>
</tr>
<tr>
<td>004</td>
<td>Webster 1999 Tax Audit</td>
</tr>
</tbody>
</table>

Figure 3-1 Holds Pick List

- Double-click desired Hold ID
  Or
- Use Lookup to choose an existing Hold type
- Specify item(s) to be placed on Hold. See Figure 3-2. Choose from:
  - Whole results set (selects entire search results hit list)
  - Contents of selected ... (marks selected item on hit list and all its contents. e.g., selected Redweld marks Redweld and all its Folders and Documents)
Create a New Hold

- Click New icon to enter a new Hold type (see Figure 3-3)

**Figure 3-3  New Hold dialog box**

- Enter short description of Hold in ID field
- Click Type link and choose Hold type from pick list
- Click Office link and location from pick list
- Enter narrative description (up to 255 characters) in Name field

**Universal Search/Holds Module**
- Enter any relevant notes in Notes field (optional)
- Click Save Hold and Apply to update database and close dialog box
CHAPTER 4

Reports

What you will learn in this chapter:

- How to generate Reports
- How to view detailed information
General

The Search Form offers several formats for generating and printing reports based on your search results. Following is a sample of available the report formats. The list of report formats available in your organization may be longer than the list contained in this user guide as your Systems Administrator may have included reports tailor-made for your organization. Figure 4-1 depicts a typical Report list.

To Generate a Report:

- Perform a Full Search
- Click the Report down arrow to display a list a report formats
- Select the desired format
Full Report

The Full Report summarizes the matches found for each Scope element used in a search and displays those results in List format, ordered by client. This color-enhanced report displays the search pattern keywords in color at the top of the report and at each instance in the body of the report.

Figure 4-2   Full Report
Full Report with Hyperlinks

The **Full Report with Hyperlinks** summarizes the matches found for each Scope element used in a search and displays those results in List format, ordered by client. This color-enhanced report displays the search pattern keywords in color at the top of the report and at each instance in the body of the report. In addition, this report provides hyperlinks from the Client level to All Matters or All Folders and hyperlinks from the Matter level to All Folders.

Detailed Report

The **Detailed Report** provides comprehensive information for each area of the search results, ordered by object. The report is formatted to:

- Identify the Requestor ([For User] and user who performed the search
- Identify the search Scope and Pattern
- Provides detailed information for matches found under each Scope entry
  - Client: Client Name, Client Number, Resp. Atty, Open and Close dates
  - Matter: Matter Name, Client Name, Matter Number, Bill. Atty, Open and Close dates
  - Related Parties: Matter Name, Client Name, Matter Number, Bill. Atty, Matter Open and Close dates
- Folders: Client Name, Matter Name, Folder ID, Folder Title, Bill. Atty, Matter Open and Close dates.
Figure 4-4  Detailed Report

You may view details for Clients, Matters, Redwelds, Folders, Boxes, Related Parties and paper Documents.

To View Detail Information

- Right-mouse click the desired object in the search results list
- Choose Details (Figure 4-5)
- View object Details via the Web Application (Figure 4-6)
- Click Close to return to the search results list

![Figure 4-6 View Details via Web Application]

- View options for electronic files include Open. To view the electronic file via the Web Application, simply right-mouse click on the desired electronic file and choose Open

![Figure 4-7 Open Electronic File]

**Preview Report**
- Click the print icon on the report toolbar and choose print preview to display print options
Figure 4-8  Print Preview

- Click (Page Setup) additional print options. Choose from:
  - Paper Size
  - Paper Source
  - Headers and Footers

**WARNING**: Changes made to the Header or Footer text will be displayed on **ALL** reports!

- Page Orientation (Portrait or Landscape)
- Page Margins
- Printer (select a different printer or printer properties)

**Print Report**

To print a copy of your Report (without preview):

- Click button on your Report toolbar to display the print dialog box
- Choose desired print options
  - Printer
  - Page range
  - Number of copies
  - Paper Source
  - Page Orientation

**E-mail Report**

To e-mail a copy of your report:

- Click button on your Report toolbar
- Conflicts will create a new e-mail message and attach a copy of your report (in .HTML format).
- Address the e-mail message and send

**Save Report**

To save a copy of your report:
• Click `Save` button on your Report toolbar
• Specify folder where report should be saved