

PracticeMaster Search Guide



PracticeMaster Search Guide

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PracticeMaster Search Guide

Purpose of Guide

The purpose of this Guide is to familiarize you with the different search features available within PracticeMaster. PracticeMaster offers many ways to search for information, including the Search Box, Conflict of Interest searching, Contact searching, Document searching, and Find and Replace.

Additional guides for separate software features are also available.

All guides are available on our Web site at:

Tabs3.com/support/docs.html

Knowledge Base

Additional detailed information on search methods is located in our Knowledge Base on the Internet at:

support.tabs3.com

Types of Searches

There are several different ways to search for information within PracticeMaster. The options available are:

Search Box

Quickly filter information by doing a text search of the information available on the list (*page 2*).

Conflict of Interest Search

This powerful tool protects your firm from potential conflicts of interest by searching all files designated for the requested information (*page 4*).

Contact Search

Simplify the way you locate contacts by searching for a specific contact instead of scrolling through a list (*page 6*).

Document Search

Search the contents of e-mail attachments and linked documents in the Document Management file (*page 10*).

Find and Replace

Efficiently search for all instances of a word or phrase and replace it with alternate text (page 12).

These methods will be discussed in more detail in the following pages.

Search Box

The Search Box is available on the **List** tab of all files as well as the Matter Manager and Graphical Calendar.

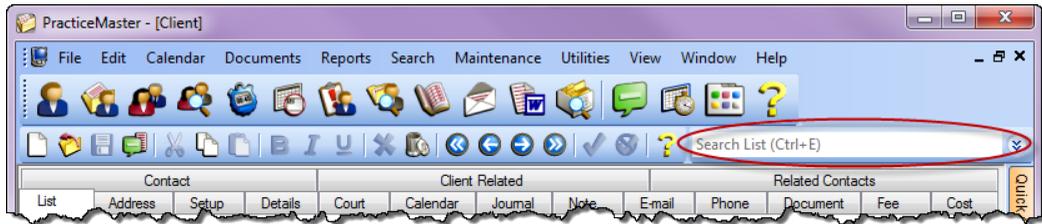


Figure 1, Search Box on **List** tab of Client file

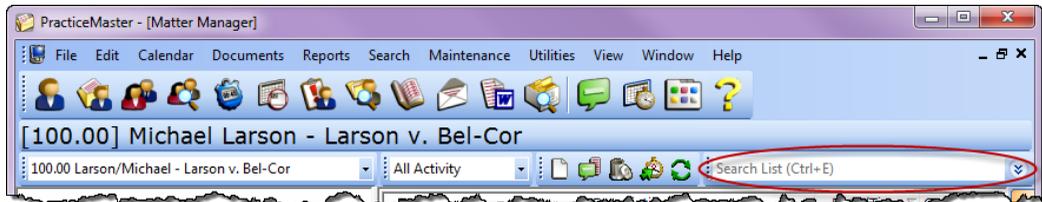


Figure 2, Search Box in Matter Manager

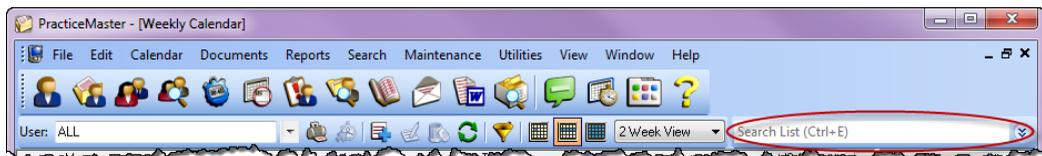


Figure 3, Search Box in Weekly Calendar

Using the Search Box is easy. Simply type the text you are searching for in the Search Box and PracticeMaster will update the list to include only records that contain the specified text. While the list is being filtered, a status indicator to the left of the search box will display the current status of the search, as shown in Figure 4. The red **Searching** indicator indicates that PracticeMaster is filtering results. The yellow **Waiting** indicator indicates that PracticeMaster is waiting for the

user to finish entering characters into the Search box. Finally, the green **Filtered** indicator indicates that the software has filtered the appropriate results and is ready to filter again. Keep in mind that it is not necessary to wait for the Filtered indicator to appear before selecting a record from the list.

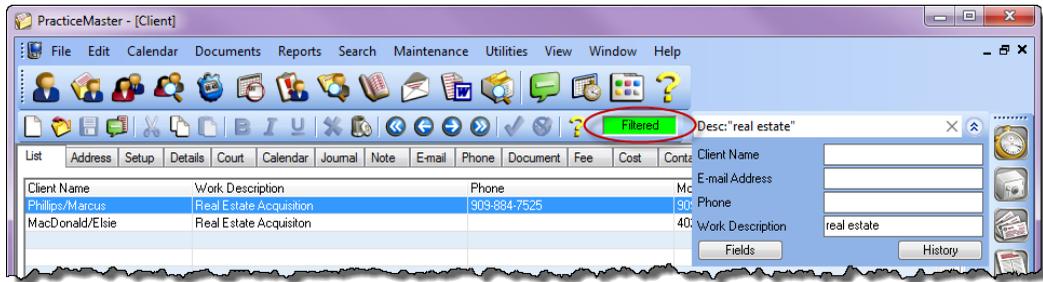


Figure 4, Search Box with Filtered indicator and Search pane

Entering text into the Search Box begins a search of every field in the current column layout for the specified text. You can also search specific fields using the Search Box. Simply click the expand  button to open the Search panel. The Search panel displays fields separately, allowing you to enter a search value for a specific field rather than the entire file. By default, the first three fields of the column layout are shown. If the field you want to search does not appear, click the **Fields** button to bring up a list of all fields available in the column layout, as shown below:

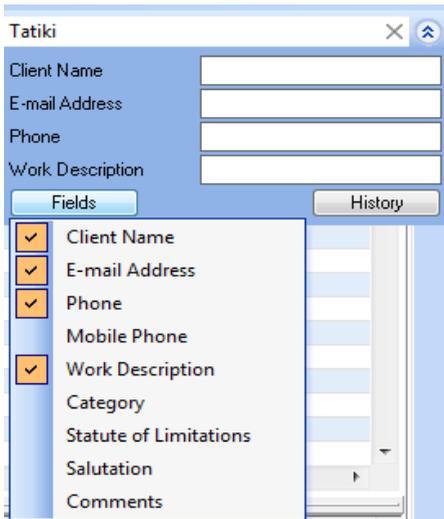


Figure 5, Search Panel with column layout fields

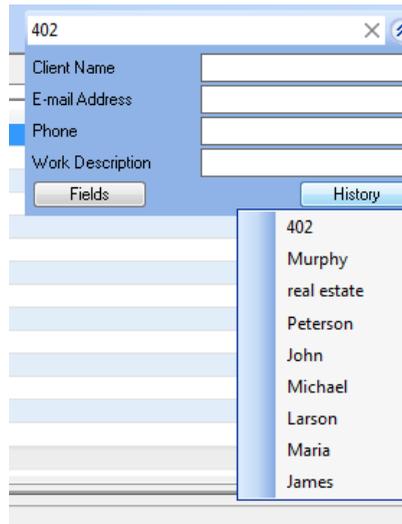


Figure 6, Search Panel with History

To add fields to the search panel, click the field name. Fields that have been added to the Search panel will be displayed with a check mark.

The **History** button shows a list of the ten most recent searches performed by the user for each column layout for each file. Clicking a value in the History list will perform the search again. To clear the text in the search box, click the **X** button in the Search Box.

Tip: Use Ctrl + E to jump to the Search box.

Conflict of Interest Search

Menu: Search | Conflict of Interest Search

Task Folders: Search | Conflict Search

One of the most important tasks in any law firm is conflict of interest searching. PracticeMaster's Conflict of Interest Search is a powerful tool designed to help your firm create and maintain ethical walls.

From the PracticeMaster Task Folders, click the **Search** tab and then click **Conflict Search** to open the Conflict of Interest Search program.

Search for: JAMES TATIKI

Search

Cancel

Phrase Match

Must match at least one word

Must match all words

Word Order

Anywhere within a record

Any order within the same field (NEAR)

Exact order within the same field

Search Options

Match partial words

Phonetic Search

Starts with

Include Worldox Conflict Search

Display results in report

Display results in Worldox

Files to Search

Client File

Document Management File

E-mail Attachments

Contact File

Fee File

Document Management Documents

Journal File

Cost File

Search all document versions

Calendar File

Area of Practice Files

Linked Documents

Print Criteria Page

Figure 7, Conflict of Interest Search

Enter one or more words to be searched in the **Search for** field. You can also search for a phrase by enclosing each phrase in double quotes.

The options below the **Search For** field are used to filter the list of potential results. The **Phrase Match** section allows you to specify whether multiple-word searches should be considered as individual words or full phrases. The **Word Order** section determines search results for multi-word searches based on the position of the words within a field and the selected option. You can also choose to **Match Partial Words** and run a **Phonetic Search** by selecting the desired check box in the **Search Options** section. The **Files to Search** section allows you to select one or more files to conflict search.

Conflict of Interest Report

Once you have selected the criteria to be used for the search, click the **Search** button. When the search has completed, you will be prompted to print the **Conflict of Interest Report**. Figure 8 shows the Conflict of Interest Report for the Conflict Search shown in Figure 7.

Date: 10/03/2016	Conflict of Interest Report Jensen, Martin & Anderson, P.C.	Page: 1
Partial word search for: JAMES or TATIKI		
415.00 MegaConstruction Corporation Corporate Merger - Megabuilders and BuilderCorp Client Photo: CMSYSTEMPHOTOS\tatiki_james.jpg Contact Name: Tatiki, Sr./James R.	Client	Modified: 04/02/2016 Primary: 3 RPA
Knight/Elizabeth M. Attorney Secondary Contact Name: James/Thomas	Contact	Modified: 04/02/2016
MegaConstruction Corporation Client Contact Name: Tatiki, Sr./James R.	Contact	Modified: 04/02/2016
Tatiki, Sr./James R. Client Contact Full Name: James R. Tatiki, Sr. First Name: James R. Last Name: Tatiki, Sr.	Contact	Modified: 04/02/2016
James/Thomas Attorney Full Name: Thomas James E-mail Address 1: james@gjslaw.com Last Name: James	Contact	Modified: 04/02/2016
JAMES or TATIKI found in 5 records		

Figure 8, Conflict of Interest Report

Conflict of interest searching must be enabled before you can run a conflict of interest search. For information on enabling conflict of interest searching, see the PracticeMaster Help.

Training Videos

You can view the following training video for more information. Clicking the image will open the training video in your browser. All training videos are also accessible in the software via the **Help | Training Videos** menu and at [Tabs3.com/pmvideo](https://www.tabs3.com/pmvideo).



Figure 9, Conflict of Interest Search Video

Contact Search

Menu: [Search | Contact Search](#)

Task Folders: [Search | Contact Search](#)

The Contact Search provides a quick way to drill down to client-specific information such as e-mail addresses and phone numbers. From the PracticeMaster Task Folders, click the **Search** tab and then click the **Contact Search** icon to open the Contact Search program.

To perform a Contact Search, simply enter the word you want to search for in the **Search for** field and click **Search**. If you want to further refine your search, the **Search Options** section allows you to **Match partial words** and/or run a **Phonetic Search**.

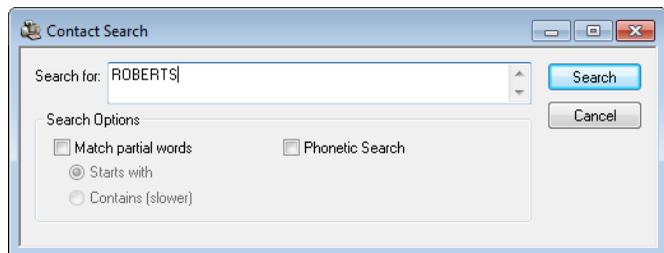


Figure 10, Contact Search

Contact Search Report

When the search has completed, you will be prompted to print the **Contact Search Report**. Figure 11 shows an example of the Contact Search Report generated for the Contact Search shown in Figure 10.

Date: 10/11/2016	Contact Search Report Jensen, Martin & Anderson, P.C.	Page: 1
Whole word search for: ROBERTS		
Roberts/Linda M. Attorney Full Name: Linda M. Roberts Organization: Roberts Law Office Last Name: Roberts	Contact	Modified: 04/02/2016
Roberts Law Office Attorney Full Name: Roberts Law Office Organization: Roberts Law Office Contact Name: Roberts /Linda M.	Contact	Modified: 04/02/2016
Olsen/Jane Attorney Organization: Roberts Law Office	Contact	Modified: 04/02/2016
120.01 Klein/Daniel P. Klein vs. Simmons Construction Patient Seen By (Doctor): Richard L. Roberts , MD	Medical Services	Modified: 11/17/2015 Primary: 3 RPA
ROBERTS found in 4 records		

Figure 11, Contact Search Report

Configuring Fields for Searching

PracticeMaster allows you to customize which fields to search when running Conflict of Interest and Contact searches. By including a field on a conflict of interest or contact search, you reduce the chances of overlooking a potential conflict, as the search will not return results for fields it is not configured to check.

Search configuration is done via the File Maintenance program. This will require exclusive access to PracticeMaster. From the PracticeMaster Task Folders, click the **Maintenance** tab and then click the **File Maintenance** icon to open File Maintenance. It is recommended that you make a backup when prompted.

Select the first file with fields you want to include in a search and click **OK**. With the file open, click the **Fields** tab. A list of all fields defined in the file will be displayed.

Select the field you want to include on your report. The **Custom Properties** section will update to display the options available for that field. There are three options in the Custom Properties window that affect the Conflict of Interest and Contact searches.

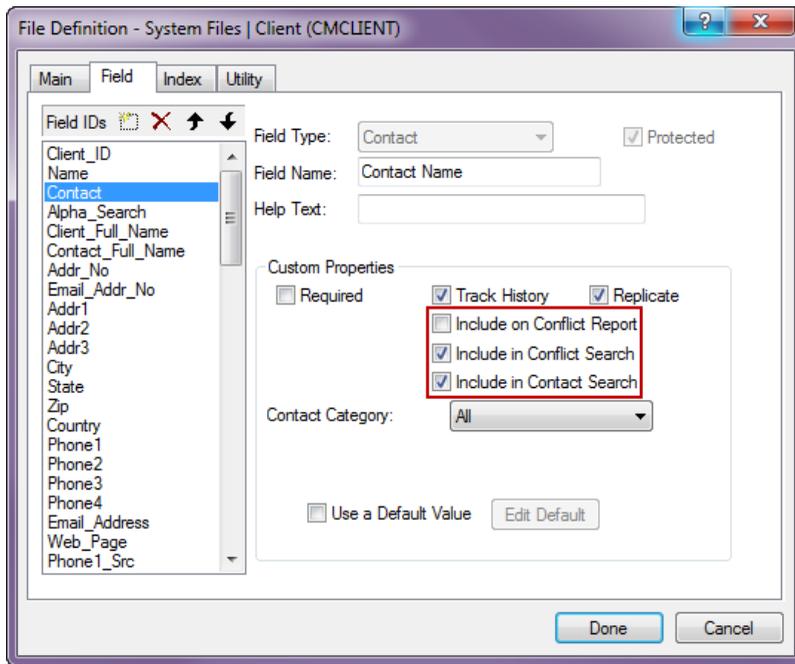


Figure 12, File Maintenance Menu

Include in Conflict Search

The **Include in Conflict Search** option determines whether a field should be included in conflict of interest searching.

Include on Conflict Report

The **Include on Conflict Report** option determines whether a field will appear on the Conflict of Interest Report generated after running a Conflict of Interest Search. This field appears for informational purposes only. In the example below, the Primary Timekeeper appears on the report despite not matching the search value.

Include in Contact Search

The **Include in Contact Search** option determines whether a field should be included in contact searching.

Date: 10/03/2016	Conflict of Interest Report Jensen, Martin & Anderson, P.C.	Page: 1
Partial word search for: JAMES or TATIki		
415.00 MegaConstruction Corporation Corporate Merger - Megabuilders and BuilderCorp Client Photo: CMSYSTEMPHOTOS\tatiki_james.jpg Contact Name: Tatiki, Sr./James R.	Client	Modified: 04/02/2016 Primary: 3 RPA
Knight/Elizabeth M. Attorney Secondary Contact Name: James/Thomas	Contact	Modified: 04/02/2016
MegaConstruction Corporation Client Contact Name: Tatiki, Sr./James R.	Contact	Modified: 04/02/2016
Tatiki, Sr./James R. Client Contact Full Name: James R. Tatiki, Sr. First Name: James R. Last Name: Tatiki, Sr.	Contact	Modified: 04/02/2016
James/Thomas Attorney Full Name: Thomas James E-mail Address 1: james@gjlslaw.com Last Name: James	Contact	Modified: 04/02/2016
JAMES or TATIki found in 5 records		

Figure 13, Conflict of Interest Report with Primary Timekeeper included

Training Videos

You can view the following training video for more information. Clicking the image will open the training video in your browser. All training videos are also accessible in the software via the **Help | Training Videos** menu and at Tabs3.com/pmvideo.



Figure 14, Contact Search Video

Document Search

Menu: Search | Document Search

Task Folders: Search | Document Search

Document Search is used to search linked documents and e-mail attachments attached to PracticeMaster records. From the PracticeMaster Task Folders, click the **Search** tab and then click the **Document Search** icon to open the Document Search program.

Document searching is easy. Simply enter the word or words you want to search for and click the **Search** button. When the search has completed, select a printer from the list and click **Print** or **Preview**.

The screenshot shows the 'Document Search' window with the following settings:

- Search for:** FEE AGREEMENT
- In Files/Documents Named:** *.DOC*
- Date Range:** All Dates (Selected), Created (Dropdown), From: mm/dd/yyyy, To: mm/dd/yyyy
- Clients to Search:** All Clients (Selected), Select Clients (Button)
- Phrase Match:** Must match all words (Selected), Must match at least one word
- Document Management Types to Search:** All Document Types (Selected), Select Types (Button)
- Search Options:**
 - Phonetic Search (Sounds like)
 - Stemming (Grammatically similar phrase)
 - Fuzzy Search (Common misspellings)
 - Fuzziness Level (1-5): 5
- Document Management Users to Search:** All Users (Selected), Created By (Dropdown), Select Users (Button)
- Files to Search:**
 - Document Management Documents
 - Search all document versions
 - E-mail Attachments
 - Linked Documents

Figure 15, Document Search window

If your search returns more results than expected, you can use the options of the Document Search program to further refine your search. The **In Files/Documents Named** field allows you to enter specific file names or extensions to be searched. The "?" character can be used as a single-character wildcard, whereas the "*" character acts as a multi-character wildcard. In the example above, the wildcard character is used to search all file names and file extensions of .doc or .docx.

You can also narrow down your search by selecting a **Date Range**, **Clients to Search**, **Document Management Types to Search**, or **Document Management Users to Search**.

Both the E-mail Attachments and Linked Documents indexes must be enabled in order to perform Document Searches. For more information on enabling indexes, see page 15.

Document Search Report

When the Document Search has completed, you will be prompted to print a Document Search Report. Figure 16 shows a Document Search Report for the Document Search shown in Figure 15.

Date: 10/11/2016	Document Search Report Jensen, Martin & Anderson, P.C.	Page: 1
Whole word search for: FEE near AGREEMENT		
100.00 Larson/Michael Larson v. Bel-Cor	Journal: E-mail	Modified: 11/15/2015 Primary: 1 MLJ
<i>E-mail Attachments:</i>		
<u>Fee Agreement.doc</u>		
-00 - Larson v. Bel-Cor	FEE AGREEMENT	This document is a retainer agreement between the law firm of
-In the event that this agreement is terminated for any reason by the Client, the fee paid shall be deemed as		
_____ Date _____ Date		
<hr/>		
100.00 Larson/Michael Larson v. Bel-Cor	Document Management	Modified: 11/15/2015 Primary: 1 MLJ
<i>Document Name:</i>		
<u>Fee Agreement.doc</u>		
-00 - Larson v. Bel-Cor	FEE AGREEMENT	This document is a retainer agreement between the law firm of
-In the event that this agreement is terminated for any reason by the Client, the fee paid shall be deemed as		
_____ Date _____ Date		
<hr/>		
FEE near AGREEMENT found in 2 records		

Figure 16, Document Search Report

Training Videos

You can view the following training video for more information. Clicking the image will open the training video in your browser. All training videos are also accessible in the software via the **Help | Training Videos** menu and at [Tabs3.com/pmvideo](https://www.tabs3.com/pmvideo).



Figure 17, Document Search Video

Find and Replace

The Find and Replace Program can be used to find one or more records containing specific text, and optionally replace the text with a new value. Find and Replace is a quick and easy alternative to updating multiple records with the same information one by one.

Find and Replace is available in all PracticeMaster files. Once the file is open, you can access the Find and Replace program by pressing *Ctrl + F* or by selecting **Find and Replace** from the **Take Action** menu of the **Quick Clicks** pane.

Using the Find and Replace program is simple. Enter the text you want to find in the **Search For** field. If you want to replace it with new text, enter the new text in the **Replace With** field. In the example below, the text "McDonald" is being replaced with "MacDonald":

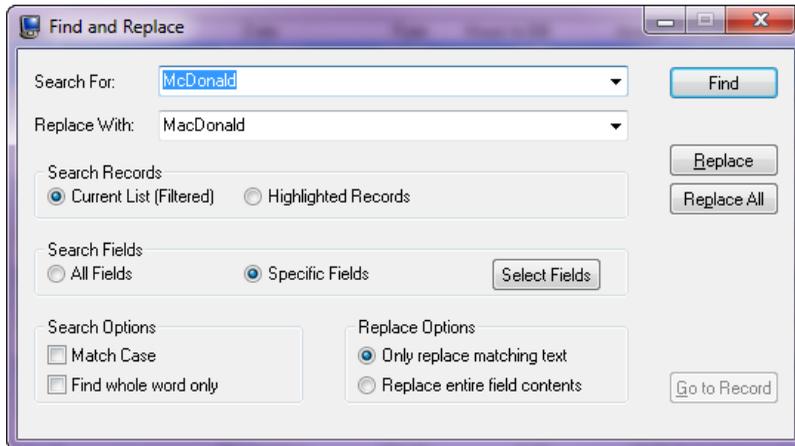


Figure 18, Find and Replace window

Once you have entered your search value, click the **Find** button. A list of all values that match your search will be displayed in the Search Results portion of the window.

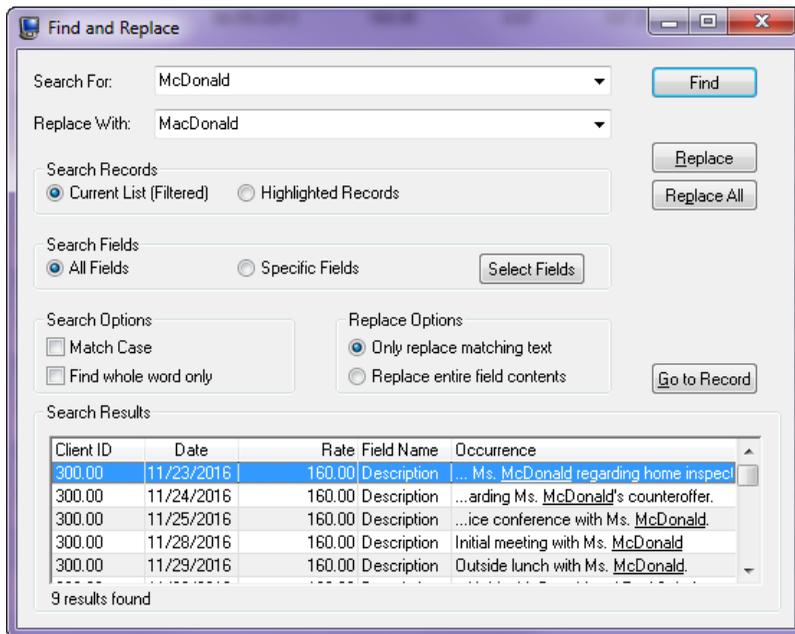


Figure 19, Find and Replace results

When the search is completed, you can load any record from the list by highlighting the record you want to load and clicking **Go to Record**. If you have entered text in the **Replace With** field, you can

use the **Replace** or **Replace All** buttons to update the selected record or all records respectively. A progress bar will be displayed.

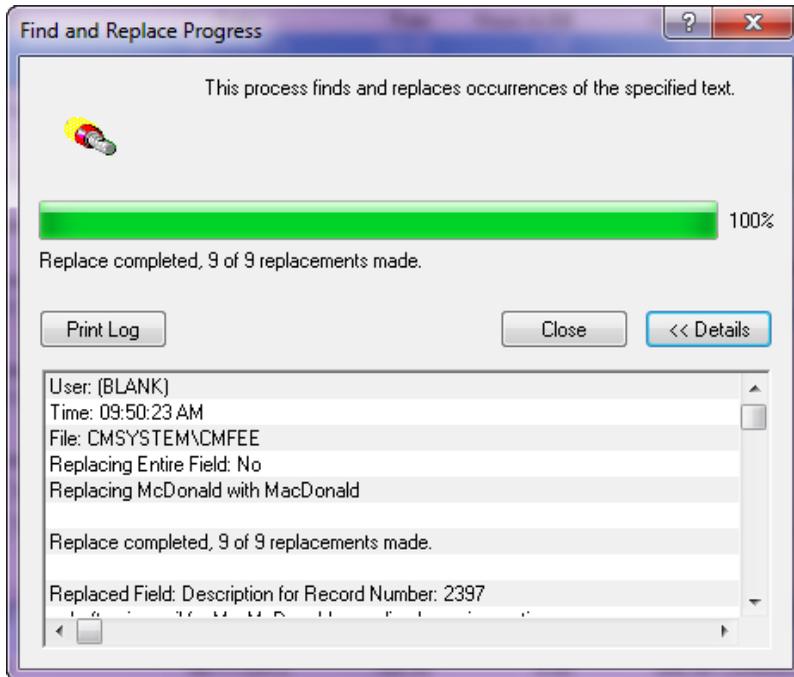


Figure 20, Find and Replace Program

The **Details** button will expand the progress menu to see these items without printing. The progress window will inform you of any changes that were or were not successfully implemented. Clicking the **Print Log** button will print a list of modifications.

You can also use the various options to further refine your search. The Search Records section lets you toggle between searching the currently selected filtered list and one or more **Highlighted Records**. The Search Fields section is used to designate which field or fields should be searched for the value in the **Search For** field. If you want to limit the find to match specific cases or full words, the Search Options section includes options to **Match Case** and **Find whole word only**. If using the Replace function, the Replace Options section allows you to choose whether you want to **Only replace matching text** or **Replace entire field contents**.

Note: You can also use Find and Replace to find and populate blank fields by leaving the **Find** field blank.

Training Videos

You can view the following training video for more information. Clicking the image will open the training video in your browser. All training videos are also accessible in the software via the **Help | Training Videos** menu and at [Tabs3.com/pmvideo](https://www.tabs3.com/pmvideo).



Figure 21, Using Quick Clicks Video

Search Settings

Menu: [Search | Search Settings](#)

Task Folders: [Search | Search Settings](#)

PracticeMaster's Conflict of Interest Search, Contact Search, and Document Search programs are configured via the Search Settings window. From the PracticeMaster Task Folders, click the **Search** tab, and then click the **Search Settings** icon to open the Search Settings program. The window is divided into three tabs: **Index Properties**, **Rebuild Index**, and **Exclude List**.

Index Properties

PracticeMaster stores the information being searched during a Contact, Conflict of Interest, or Document Search in “index” files. The **Index Properties** tab of the Search Settings window is used to configure how often the information contained in these indexes is updated.

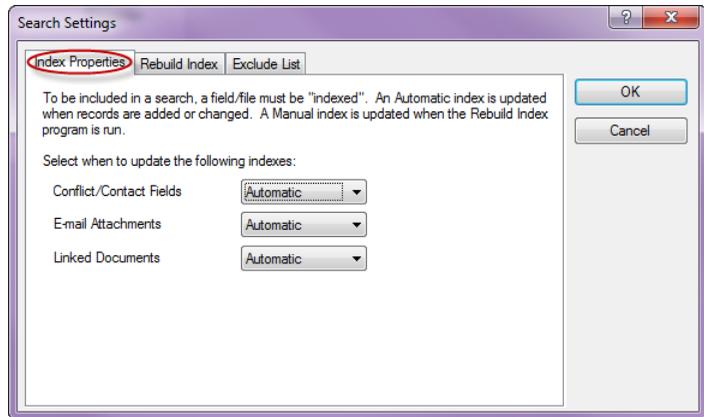


Figure 22, **Index Properties** tab

To the right of each index is a drop-down menu allowing you to select when the indexes should be updated. The available settings are **Automatic**, **Manual**, and **Disabled**. We recommend setting indexes to **Automatic** to ensure that the index files are kept up to date.

Rebuild Index

The **Rebuild Index** program is used to update index information for the Conflict/Contact, E-mail Attachments, and Linked Documents indexes. The process of rebuilding is the same regardless of the settings on the **Index Properties** tab.

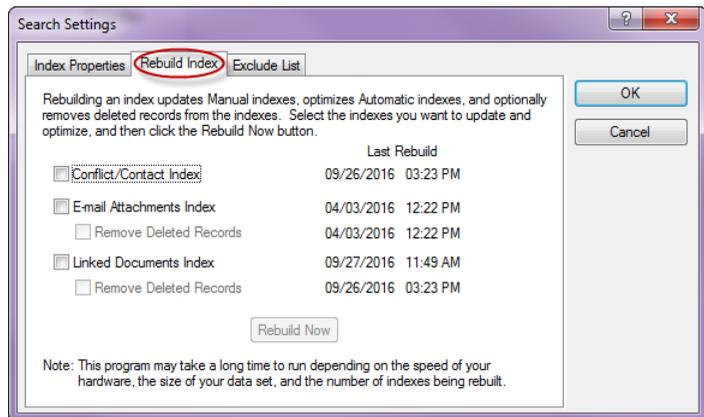


Figure 23, **Rebuild Index** tab

Rebuilding an index is simple. Select the corresponding check boxes for the indexes you want to rebuild. When rebuilding the Linked Documents or E-mail Attachments indexes, you will also have an option to **Remove Deleted Records**. Choosing to remove deleted records may take longer, but it

results in more efficient searches. Once you have selected these options, begin the rebuild by clicking the **Rebuild Now** button.

Exclude List

The Exclude List is used to specify words that should not be included when running the Conflict of Interest Search, Contact Search, or Document Search. This reduces the size of the index files, resulting in faster search times when searching a significant amount of data. PracticeMaster includes a list of commonly excluded words.

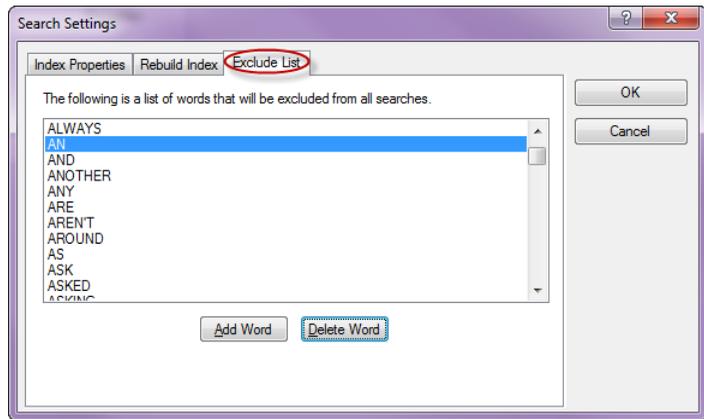


Figure 24, **Exclude List** tab

To add a word to the Exclude List, click the **Add Word** button. An empty text box will be added to the list of words. Type in the word you want excluded and press Enter. The word will be added to the list in alphabetical order.

To remove a word from the list, highlight the word and click the **Delete Word** button.

Resources

Additional information on the features included in this guide is available via PracticeMaster's built-in help files, PracticeMaster Training Videos, and the Tabs3 and PracticeMaster Knowledge Base.

Help

Help is installed with the software and is easily accessed by pressing F1, by clicking the  button, or by selecting the **Help | Help Topics** menu option. Help includes detailed information regarding specific programs. Clicking the  button opens the relevant Help topic for the window you are currently using. Many times, reading the appropriate Help topic may be the fastest way to find your answer.

Knowledge Base

Tabs3 and PracticeMaster publishes an extensive Knowledge Base on the Internet with advanced information. It contains information on Error Troubleshooting, Networking & Windows Issues, "How To" articles, and product-related articles. You can access the Knowledge Base via the software from the **Help | Internet Resources | Knowledge Base** menu option or from your Internet browser at

support.Tabs3.com.

Training Videos

You can view the following training videos for more information. Clicking an image will open the associated training video in your browser. All training videos are also accessible in the software via the **Help | Training Videos** menu and at **Tabs3.com/pmvideo**.



Figure 25, Conflict of Interest Search Video



Figure 26, Contact Search Video



Figure 27, Document Search Video



Figure 28, Using Quick Clicks Video

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