


Advanced Searching and Filtering


USING ADVANCED SEARCH IN ndWEB

From your NetDocuments browser (**ndWeb**), click the **Advanced Search** icon on the right of the **Search** box at the top:



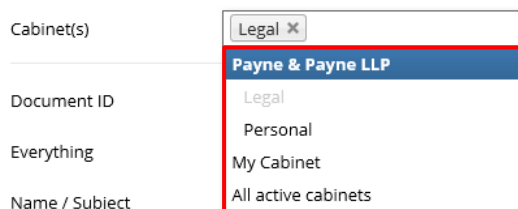
THE ndWEB ADVANCED SEARCH FORM

1. To ensure you are running a new search, click **Clear Fields** at the top-right: [Clear fields](#)
2. Click **Documents** to exclude e-mails from your search, click **Email** to exclude documents or click **All** to search for both:



NOTE - if you select **Email**, extra fields are added to the form that are specific to emails, e.g. **Email From/To/Cc** etc.

3. Click in the **Cabinet** field to select one or more cabinets to search in. Use **Ctrl + click** to select multiple cabinets, or select **All active cabinets** to search them all:



NOTE – the search form changes depending on the cabinet selected. E.g. if you select a **Legal** cabinet, **Client** and **Matter** fields are added to the form which may not be visible if you select e.g. a **Personal** cabinet.

4. Search for a document number in the **Document ID** field:

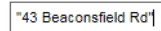


Separate every 4 digits with a hyphen, or type the number with no spaces/hyphens.

TIP – to search for several document numbers, leave a **space**, **comma** or **semicolon** between each 12 digit number.

5. To search the **contents** of documents/e-mails, type a word or phrase in the **Everything** field:

> Type phrases inside speech marks:

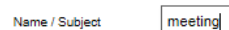


> Use curly brackets to perform an **exact search**, e.g. {United Kingdom}

TIP – to refine your search you can use **Boolean operators**, e.g. **AND**, **OR**, **NOT** etc. and **wildcards** e.g. *** ?** etc. For example:

- Search for **Payne AND lease** to find documents containing both words.
- Search for **Payne OR lease** to find documents either of those words.
- Search for **Payne NOT lease** to find documents containing the word Payne but **not** the word Lease.
- Search for **Payne w/10 lease** to find documents containing the word Payne within 10 words of the word lease. The number can be changed.
- Search for **Dav*** to find all documents containing words beginning with 'Dav' e.g. it will find both 'Dave' and 'David'.
- Search for **organi?e** to find all documents containing both the word 'organize' and 'organise'.

6. To search within the **name** or **subject** of documents and e-mails, type a word, phrase or Boolean operator into the **Name** or **Subject** field:



7. To narrow your search to a specific **client**, start typing the relevant client number or name in the **Client** field:

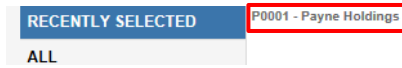


As you type, a list of clients matching your criteria is displayed in a drop-down list (in **ndWeb** only). Click once on the relevant name to select it. The client number then appears in the Client field.

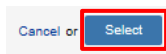
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What if I don't know the exact Client number or spelling of the name?

- > Click the **Lookup** button **...** at the end of the **Client** field (or press **F2**) to display a pop-up window with a list of **Recently Selected** clients:



- > Click once on the relevant client name, then click **Select** at the bottom-right of the pop-up window :



What if my client is not in the Recently Selected list described above?

Select **All** from the left-hand menu to view a list of all clients. Alternatively, you can **search** for the client by name:

- > Click the drop-down arrow on the **Find entries that** field and select **contain**:



- > Just underneath where it says **Look in**, select the **Description** radio button:



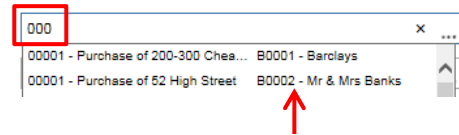
- > Type the client name in the **search** field and press the **Enter** key or click the **magnifying glass** on the right:



- 8. To narrow your search to a particular **matter**, start typing the relevant matter number or name in the **Matter** field.

- 8.1. If a client number has already been entered in the **Client** field above, a list of matters for **that client only** (that match your criteria) will be displayed in the drop-down list.

- 8.2. If a client number has **not** already been entered in the **Client** field above, a list of matching matters for **all clients** will be displayed in the drop-down list:



The client **number** and **name** is shown alongside the matter details.

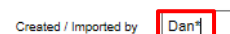
- 8.3. Click once on the relevant matter to add both the client and matter numbers to the **Client** and **Matter** fields on the Search form.

TIP – if you don't know the exact matter number or name, find it using the **Lookup button** **...** (or **F2**).

- 9. To search for a specific **type** of document, e.g. Correspondence, enter the required type in the **Document Type** field, then select from the matches in the drop-down list. (Or use the **Lookup (F2)** to find it):



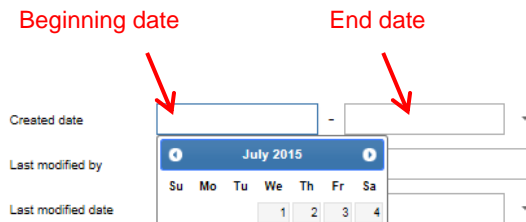
- 10. To search for documents created by a specific **person**, type their **first name**, **surname** or **both** in the **Created by** field. If you do not know the exact spelling, you can use **wildcards** as shown below:



TIP – click the blue **'Me'** link on the right to quickly insert your own name: **Me**

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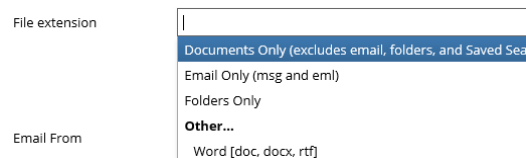
- To search for documents created within a certain **date range**, click into the **Created date** field and select the **beginning date** of the range from the drop-down calendar, then click into the next field to the right and select the **end date**:



TIP – to find all documents created in the last 30 days, type **-30** (number can be changed) into the **Beginning date** field (**+0** will automatically be entered into the **End date** field). This finds all documents created from 30 days ago to today:

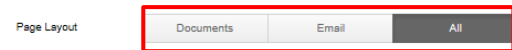
Created / Imported date -

- To search for documents **modified** by a certain person or within a certain date range, use the **Modified/Sent by** and **Modified/Sent date** in the same way as the **Created by/Created date** as above.
- To search for **folders**, or documents from within a specific **application** e.g. Word, Excel etc. click into the **File extension** field and select from the drop-down list:



- To display **additional search options** on the form, click **Show more options** at the bottom of the form: [Show more options](#)

NOTE – options vary depending on whether you are searching for **Documents**, **Email** or **All** (top of the form):



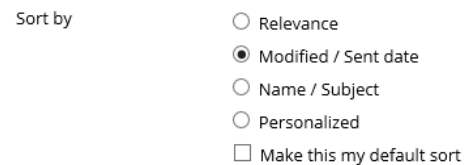
- To search just for e-mails with attachments, tick the **With attachments only** checkbox:



- ShareSpace name** – click to search for a ShareSpace (a secure container for sharing/collaborating on documents):

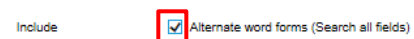


- Sort by** - sort your search results by relevance to the **criteria**, **date** or **name** using the options in the **Sort by** section. To make your selection the default, click the checkbox at the bottom:

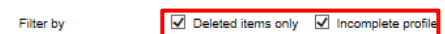


NB – select **Personalized** to sort items in the results **higher**, if your name is in the Author, Created By or Modified By fields (for documents), or the Sent To, Sent From, Imported By fields (for email).

- If searching for a specific word, e.g. 'person', you can include all variations of the word in the search, e.g. 'people'. Tick the **Alternate word forms** checkbox:



- To search for files which have been deleted, or for files where the profile form is not complete, click the relevant checkboxes next to **Filter by**:



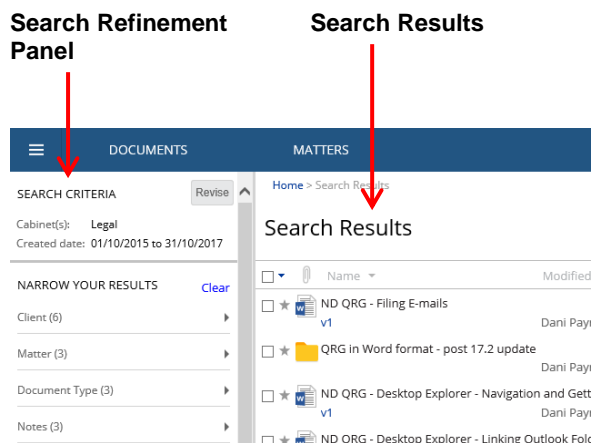
- To run the search, click the **Search** button at the bottom of the form:



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THE SEARCH REFINEMENT PANEL

After running a search in ndWeb, the **Search Refinement Panel** is displayed on the left of the screen and the **Search Results** are displayed on the right of the screen, in a list:



You can use the **Search Refinement Panel** to **change search criteria**, and to **filter the search results**, making it easier to find the file/s you need.

Changing Search Criteria

You can change any of the search criteria that was used to create the original search.

1. At the top of the Search Refinement Panel you will see the **Search Criteria** section:



All criteria entered or selected while creating the last search are shown in this list. E.g. you may see the **Cabinet** you searched in, the **Words** you searched for (and which fields are being searched, i.e. either Name/Subject or Everything), the **Client number** you specified etc.

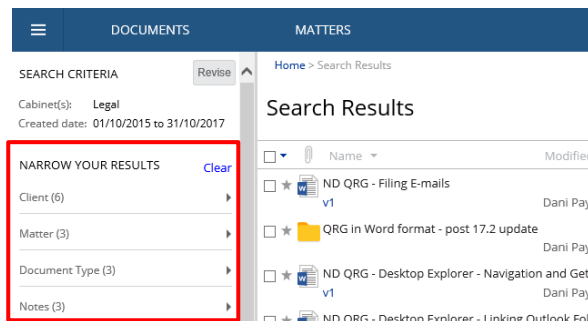
2. To change, add or remove any of the search criteria, click the **Revise** button at the top-right of the Search Criteria section:



The **Advanced Search** form is displayed. Make any changes required, then run the search again.

Filtering your search results

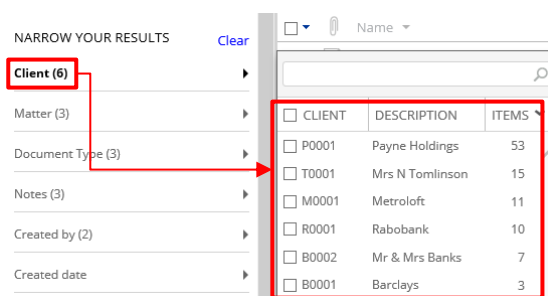
Further down the Search Refinement Panel is the **Narrow Your Results** section:



1. In this section the search results have been **filtered**. Each **filter** (Client, Matter, Document Type etc.) offers a different way to narrow down your search results.

You can click on a filter and select exactly which results you wish to see. This can be repeated for as many filters as required.

2. When a filter has a **number** alongside its name, the number indicates how many **sub-filters** there are. E.g. **Client (4)** means that the search results contain documents and/or e-mails that were created for **4 different clients**.
3. To view a filter, click on the **filter name**, e.g. **Client**. A pop-up window is displayed:



- 3.1. In the pop-up window, the search results are broken down into groups, or **sub-filters**. E.g. the **Client** filter displays a list of clients for whom results were found. The **Document Type** filter displays a list of all the different document types that were found in the search etc.

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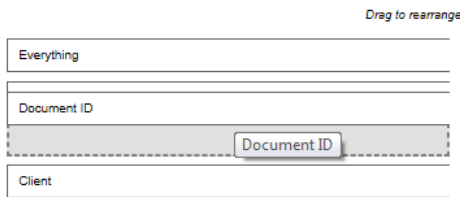
Customising the Advanced Search form

You can reorder any of the fields on the Advanced Search form:

1. Click the **User-defined page layouts** icon at the top-right of the Search form (below the **Search Options** button):

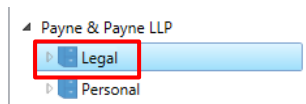


2. Click and drag any field to a new location as required, then click **Save** at the bottom:



Running an Advanced Search from ndOffice

1. From within an application, e.g. Word, click **File > Open** in the normal way.
2. On the left-hand navigation pane, click on the **Cabinet** you wish to search in:



3. Click the **Advanced Search** icon at the top-right of the dialog box:



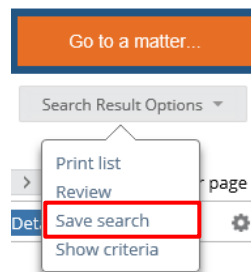
The Advanced Search form is displayed. For further help, see **The ndWeb Advanced Search Form** section above.

CREATING SAVED SEARCHES IN NDWEB

If you regularly perform a search, you can save it so that it can be run again easily:

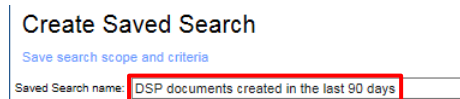
1. Create and run the search as normal.

2. At the top-right of the screen, click the drop-down arrow on the **Search Result Options** button, and select **Save search** from the drop-down list:



3. The **Create Saved Search** screen is displayed:

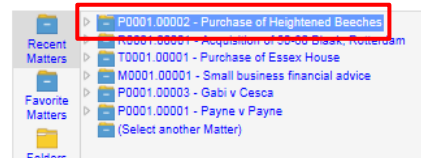
- 3.1. Enter a **name** to describe your search, e.g. 'DSP documents created in the last 90 days':




- 3.2. Select the **cabinet** to save the search to e.g. Legal, Personal etc.:

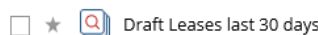


- 3.3. Select the **workspace** (and folder if required) to save the search to, e.g. the Client or Matter workspace:



- 3.4. Click **OK**.

4. Saved searches are displayed with the  icon. To run a saved search, click once on the name of it:



TIP – you can add a saved search to your **Home Page** (and to your **Favorites**) by clicking the **star** icon to the left of it:

