


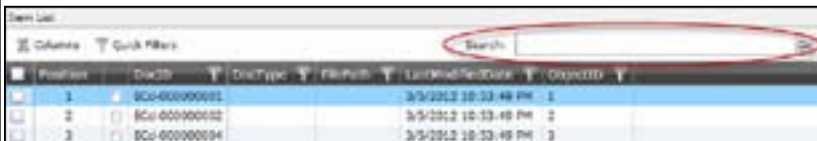
Searching in Review

1 ABOUT SEARCHES

Searches are run in the *Project Review* of the application. To access the Project review, click the **Project Review**  button next to the project in the *Project List* panel. To run searches, you must have the *Run Searches* permission.

3 RUNNING QUICK SEARCHES

1. Set your search scope and filters.
2. In the search bar of the *Item List* panel, enter a word, or multiple words separated by commas. You may also enter a boolean search phrase in the search bar.
3. Click **Go** to execute the search.



Position	DocID	DocType	File Path	Locked/In Queue	ObjectID
1	BCU-000000001			3/5/2012 10:33:46 PM	1
2	BCU-000000002			3/5/2012 10:33:46 PM	2
3	BCU-000000004			3/5/2012 10:33:46 PM	3

The search is performed within the specified scope and only searches the body content of the documents within the scope. Search results appear in the *Item List* panel.

If you are searching by keyword, you can select a document from your search results, and see highlighted instances of the word in the *Natural* view.

Quick searches will also appear in the *Recent Searches* on the *Searches* tab of the *Case Explorer*.

2 SETTING THE SEARCH SCOPE

Before searching, you need to set a search scope and search filters.

1. In the *Case Explorer*, uncheck items to exclude items from the scope of the search. These scope items include:
 - Document Groups, Production Sets, Transcripts, Notes, Exhibits, Labels, Issues, and Categories.
2. In the *Facets* tab of the *Case Explorer*, you may select any combination of facets to apply to the current search scope.
3. Click the **Apply** check mark button in the top of the *Case Explorer*. This will apply the currently selected scope and any selected facets to the *Item List*, allowing you to search and review on the resulting subset.

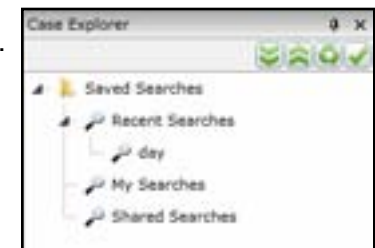
Note: The facets will persist through searches until you clear them. Scopes may be changed and searches re-run by use of the *Apply* button as well. After updating a facet or scope item, you may click the *Apply* button, which will update the scope and re-run any search that has not been cleared out by use of the *Clear Search* button.

4 RUNNING RECENT SEARCHES

When you execute a search, the search conditions are saved. You can view and reuse recent searches. The last ten searches are saved in the *Recent Searches*.

1. In the *Case Explorer*, click the **Searches** tab.
2. Expand the **Recent Searches**.
3. Right-click the search and select **Run Search**.

The search is run using the original search scope and the original search criteria. The search results appear in the *Item List* panel.



5 RUNNING ADVANCED SEARCHES

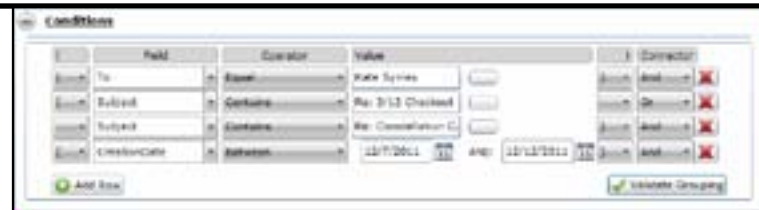
If using a quick search does not return the results you expected, you can use advanced searching techniques.

1. Click the **Search Options** button in the *Item List* panel and select **Advanced Search**.

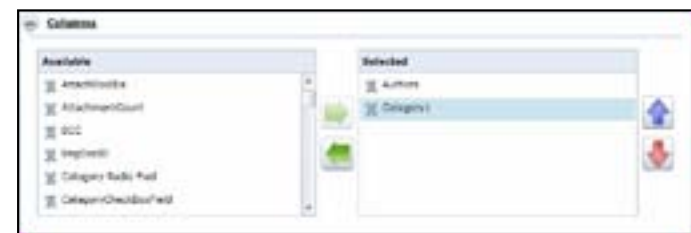
2. In the *Information* section, do the following:



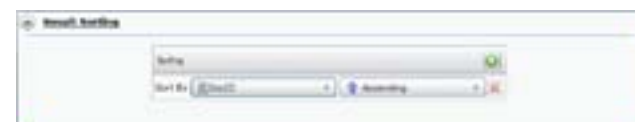
- a. Enter a *Name* for the search if you want to save the search. Otherwise, the search will appear in the *Recent Searches* list and will not be able to be saved.
 - b. (Optional) Select the type of *Variation* you want to include in your search.
 - c. In the text field, enter the freeform text you want to include in the search. Freeform searching lets you combine keyword, boolean, and regular expression criteria to perform a search on evidence files.
 - d. To add related terms for the words you entered, click **Expand All**.
 - e. To import a list of terms from a TXT file, click **Import Terms**.
3. Expand the **Conditions** section to search within the fields/columns of the documents and do the following:
 - a. Select a field that you want to search within.
 - b. Select an *Operator* from the drop-down.
 - c. Select or enter a value using the following:
 - **Field:** Enter text or symbols.
 - **Date:** Enter a date or click the calendar to select a date.
 - **Look up button:** Click the blank button to look up available search criteria for the selected field.



- d. Select either **"And"** or **"Or"** as the connector.
 - e. Click **Add Row** to add additional conditions.
 - f. Set parenthetical criteria. Then, click **Validate Grouping** to validate your parenthesis.
4. Expand the **Columns** section to add visible columns to your search results and do the following:
 - a. Click the right arrow to add columns and the left arrow to remove columns.
 - b. Click the up and down arrows to adjust the order of the columns.
 5. Expand **Result Sorting** to select the column by which you want the search results to be sorted. The column does not need to be visible to sort by it.



- a. In the *Sort By* drop-down, select the field you want to sort by.
- b. In the second drop-down, select whether you want to sort by *Ascending* or *Descending*.



6. Click **Search**.

6 SAVING A SEARCH

You can save any advanced search that you design in the Advanced Search Builder. All saved searches are stored in the Searches tab of the Case Explorer. You can use saved searches to run past searches again or to share your search with a group of users.

1. Click the **Search Options** button in the *Item List* panel and select **Advanced Search**.
2. Enter a *Name* for the search.
3. Enter criteria for the search.
4. Click **Save**.

8 CLEARING SEARCH RESULTS

After you have performed a search, the items in the *Item List* are the result of the list. You can clear the search result to view the documents in the grid before you performed the search. Clearing the list will also clear the *Recent Searches*.

1. In the *Item List* panel, click **Search Options > Clear Recent Searches**.

7 SHARING A SEARCH

You can share your saved searches with other groups of users. To share a search, you need to have the Manage Searches permission.

1. In the *Case Explorer*, click the **Searches** tab.
2. Expand **My Searches**.
3. Right-click the search and select **Manage Permissions**.
4. Check the groups with which you want to share the search.
5. Click **Save**.



9 SEARCHING IN NATURAL VIEW

In the *Natural* panel, you can search by keyword in the *Search* tab for the selected document.

1. Select a document in the *Item List* that has a native application.
2. In the *Natural* panel, click the **Search** tab.
3. In the *Search* field, enter a search keyword.
4. The first instance of the word is highlighted in the natural view.
5. Click the next and previous buttons to see the other instances of the keyword.