
9 Conducting Searches: Quick and Advanced

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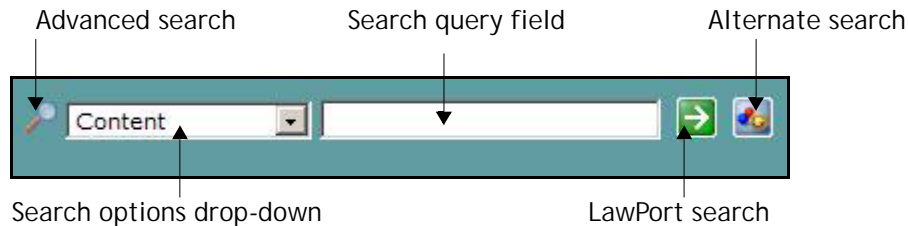
Overview of LawPort Search

LawPort’s Quick Search allows you to search LawPort for content, content associated with a specific site, people, IDs and Exts (net ids and extensions), clients and matters, and DMS (Document Management System) documents. This Quick Search also includes a Google option, which lets you query, as you don’t have to open up a new browser, Google fast.

Accessibly located in the header of all LawPort views, Quick Search’s user-friendly interface offers its search options in a drop-down format. The search fields to the right of the drop-down change according to the search option selected (e.g., if the People option is selected, two fields, one for first name and one for last name, appear on the right). After a user enters a query into the fields, they can click the arrow button to execute an internal LawPort search of their query. For an alternate search of their search query, users can click the button on the far right. Your LawPort administrator will configure the alternate search to execute searches in one of

the many search engines available on the internet, such as Google or Yahoo. And if a more refined search query is necessary to yield the appropriate results, users can click the magnifying glass icon to the left of the drop-down to view an Advanced Search form associated with the search option selected.

Figure 9-1 Quick Search application



ANATOMY OF THE QUICK SEARCH TOOL BAR ...

Quick Search offers six LawPort searches: Content, Site Content, People, IDs and Exts, Clients and Matters, and DMS Documents. Each search provides one or two search fields depending on the search option selected. Figure 9-1 above shows the Content search with its corresponding search field. If no results are returned from any of the Quick Searches, the Advanced search form that corresponds with the search option selected will appear. The Advanced search forms allow you to apply specific search criteria to your search and try your search again. The Advanced search forms are covered in [“How to use the search applications effectively” on page 277](#).

The list below defines the searches in Quick Search:

- **Content search** allows you to conduct a general content search of all views in LawPort. If you want to conduct a content search of the view you have open, select the Site Content search option to conduct your search. If you want to learn more about how the content search terms you enter are interpreted, refer to: [“How quick search interprets your search terms ...” on page 272](#). Also, if SharePoint is enabled in your firm’s LawPort, search results may include, in addition to PubItems, content associated with web parts, such as lists, announcements and shared documents.
- **Site Content** allows you to search for content associated with the view you have open before you or with the SharePoint site you have open before you. Not just PubItem types are returned with a content search. If SharePoint is enabled in your

firm's LawPort, your search results may include, in addition to PubItems, content associated with web parts, such as lists, announcements and shared documents.

- **People search** allows you to search your firm's LawPort directory of employees.
- **IDs & Exts** allows you to search your firm's LawPort directory of employees using Network IDs and Extensions.
- **Client Matter search** allows you to search LawPort for clients and matters.
- **DMS search** allows you to search your Document Management System for a specific documents or for a set of documents.

WINDOWS SHAREPOINT SERVICES AND QUICKSEARCH

LawPort 4.0, LawPort for SharePoint includes functionality that allows LawPort to be integrated with Windows SharePoint Services (WSS). The integration of WSS with LawPort provides LawPort users with a variety of WSS web parts. These WSS web parts can be configured to include content other than Published Item content. A user can add these WSS web parts to SharePoint-rendered views and WSS sites. QuickSearch takes into account this new non-Publication Item content. If you conduct a Content search or a Site search, QuickSearch, in addition to searching for Publication Item content, will search for any non-Publication Item content and include it in the search results. Different types of documents or items (e.g. shared documents, announcements) will be considered to be equivalent to different PubItem types and displayed in the search results accordingly. In addition, the Advanced Search form includes an Include Non-Publication Item content option that you can check to include non-Publication Item content in your results. To learn more, refer to ["Include Non-Publication Item Content" on page 286](#) in this guide.

To learn more about WSS web parts, refer to ["Components and Web Parts" on page 30](#) of this guide. Also, ask your LawPort Engagement Manager or LawPort administrator for help locating SharePoint documentation that provides detailed information on WSS web parts.

QUICK SEARCH'S INTELLISEARCH FUNCTION...

Intellisearch applies when the search type is Content, which you select from the Quick-Search's drop-down list. When you select Content as a search type, recognizing a number of different patterns in your search terms, will direct your input to the appropriate search page. For example, if the search box recognizes that you are searching for a person, it will direct your search to the People search page, without you explicitly indicating that you are searching for a person.

How can you tell when Intellisearch is in effect?




When Intellisearch recognizes a specific format for a search, the "external search icon" changes to reflect the type of search. The types of Intellisearch matches are: Person, Client, Matter, DMS.

PLAINTEXT HIGHLIGHTING AND NAVIGATION

Plaintext highlighting makes it easy for you to locate your search terms in the items returned in your search results. When you open an item in your search results, as with the News item in Figure 9-2 below, you will find the search terms you entered highlighted throughout the document. To learn about what types of searches invoke plaintext highlighting, refer to ["How plaintext highlighting works" on page 271](#).

SEARCH TERM NAVIGATOR AND PLAINTEXT HIGHLIGHTING...

The Search Term Navigation(STN) appears as a tab on the right of your open item. The STN displays your search terms and indicates the number of times a search term appears, as with "court (9)" in the example on the right. The STN appears transparent, allowing text to show through, until you interact with it. You can interact with it in the following ways:

- Click the search term listed in the STN to jump to every occurrence of your search term(s) in the open item.
- Click  (in the header of the STN) to return to the top of the item in view.
- Click  (in the header of the STN) to hide any paragraphs that do not include your search term(s).
- Click  to hide the STN.

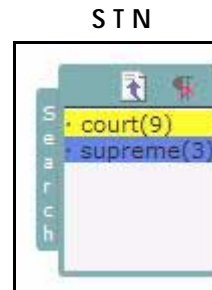


Figure 9-2 Plain text highlighting and navigation



Note: The FirmWide icon in the top left of the figure above only appears in SharePoint views.

HOW PLAINTEXT HIGHLIGHTING WORKS

The following list indicates exactly what types of searches do and do not invoke plaintext highlighting:

- Does highlight exact matches of keywords the user types into the quick search or simple search.
- DOES NOT highlight different forms of a search term entered in quick search or simple search -- i.e., if you search for "litigate", "litigation" will not be highlighted

- DOES NOT highlight thesaurus equivalents of search terms entered in quick search or simple search -- i.e., if you search for "litigate", "prosecute" will not be highlighted
- DOES NOT highlight wildcard matches of search terms entered in quick search or simple search -- i.e., if you search for "litig*", "litigate" will not be highlighted
- DOES NOT highlight terms when searching from the advanced search page using explicit Verity syntax. This is because the keywords are embedded in Verity Query Language, which Lawport does not parse prior to submitting it to the Verity search engine.

WHO CAN USE SEARCH ...

The LawPort search application is available to all users. The results that are returned from a Content Search, including those from the Advanced content search, will consist of published items that have not been secured (available for everyone to see) or, if secured, items that have been secured to the logged in user.

USING QUICK SEARCH

To run a search using Quick Search:

- Click on the tab to activate the search you want, enter your search terms into the field(s) provided, and then click the Search button.

HOW QUICK SEARCH INTERPRETS YOUR SEARCH TERMS ...

The search terms you enter into the Content search field are interpreted by Quick Search as follows:

1. **Implicit AND operator:** PubItems will match if they have ALL of the search terms entered in the field. In other words, each search result returned will contain all of the terms you entered into the field.
2. **Double Quotes:** Quotes indicate a phrase that must appear in any matching PubItems. Any terms outside of quotes are AND'd together with the quoted phrases.

Note: *If an odd number of quotes appear in a search term, the terms from the last quote to the end of the term are interpreted as a phrase.*

Examples of searches with double quotes:

- “demonstrated prior art” finds PubItems with the exact phrase “demonstrated prior art”. Note that each term within the phrase is stemmed, so a PubItem with “demonstrate prior arts” will match.
 - California Electric “utility deregulation” finds terms that have the phrase “utility deregulation” plus the terms ‘california’ and ‘electric’. Any of the terms can be located anywhere in the PubItem relative to one another. Of course, “utility deregulation” must appear as a phrase.
 - “san Francisco” “law offices” finds PubItems with the two phrases “San Francisco” and “law offices” located anywhere relative to each other.
3. **Title, Description, and Content searching:** terms that appear in the title (as specified in the Publishing Wizard), description (as specified in the Publishing Wizard), and content of the PubItem itself are searched from this form.
 4. **No Verity Syntax:** the application will not accept Verity operators in this field. Attempting to use Verity syntax will result in inconsistent results.
 5. **Wildcards:** terms can then include the asterisk character to match any number of characters (as in ‘fis*’ to match ‘fiscal’ and ‘fission’). Terms can also include the question mark to match any one character (as in ‘rad??’ to match ‘radio’ and ‘radar.’ Only the * and ? wildcards are accepted. Terms with wildcards should not to be preceded by Verity’s <WILDCARD> operator.
 6. **Thesaurus Expansions:** if the thesaurus is turned on in the configuration file, all terms in the Content search field are subject to thesaurus expansion.
 - Given a thesaurus that includes ‘fiscal, fiduciary, economic’ as synonyms, the search ‘economic indicators’ would match all PubItems that have ‘indicators’ AND at least one of the terms ‘fiscal,’ ‘fiduciary,’ or ‘economic.’
 - The thesaurus will expand contiguous terms in the search term which match a phrase in the dictionary. For example, given a thesaurus that includes ‘San Francisco, Bay Area, SF’, the search for ‘Civil law San Francisco’ will match a PubItem with the terms ‘Bay Area’ and ‘civil’ and ‘law.’

- If a term is expanded into a multi-word phrase through the thesaurus, the multi-word phrase must appear exactly as specified in the thesaurus. For example, if you enter 'SF' in Content search, 'Bay Area' will be matched but 'Area Bay' will not.

Note: *A custom thesaurus can be created and imported through the database. Contact your LawPort Engagement Manager for more details.*

7. **Double Quotes Together with Thesaurus Expansions:** terms inside quotes are subject to expansion through the thesaurus. However, they are considered independent of terms outside the quotes, and thesaurus expansions can not take place across the boundary of quote marks. For example, given the search 'bay area "joint venture" capital', the thesaurus would look for three sets of synonyms:
 - 'bay area' 'bay' 'area' from the first grouping outside the quotes
 - 'joint venture' 'joint' 'venture' from the quoted phrase
 - 'capital' from the final unquoted term

Note: *Note that in the preceding case, the thesaurus would never look for an expansion for 'venture capital', because that phrase crosses a quote boundary.*

8. **No Case Sensitivity:** case does not matter. 'San francisco,' 'SAN Francisco,' 'san Francisco' – they all match each other.
9. **Punctuation:** the following punctuation marks: '{}|][~!@#\$\$%^&()-+_:;.-\B are ignored during indexing regardless of where they appear in a term. The terms are also ignored during searching, which means that the characters act as term delimiters and are not searchable by themselves.
 - For example, if a PubItem contains the term 'bob@yahoo', it is indexed in the Verity collection as two terms: 'bob' and 'yahoo'. A search for either 'bob' or 'yahoo' will yield this PubItem.
 - In the previous example, the search for 'bob@yahoo' will also yield the PubItem. Furthermore, because the @ sign is ignored, the PubItem will also be returned by a search for bob#yahoo, or bob+yahoo.
 - Another example: the number '\$1500' will be indexed as simply '1500'. The PubItem will be returned if you search for '\$1500', or for '1500'

-
- A final example: the PubItem text 'coca-cola' is indexed as two separate terms, 'coca' and 'cola'. Searching for 'coca-cola' will find the PubItem. Searching for 'coca cola' will find also it. Because the original term is separated into two terms, searching for 'cola coca' will also find it.
 - The same behavior applies to all of the other punctuation marks listed above. In effect, they are replaced by spaces during the indexing process, so they are not searchable.

10. **Exception to the punctuation rules given above:** when the period (.) appears in the middle of a term, it is indexed as part of the term. Therefore 'yahoo.com' will only be searchable as 'yahoo.com' - neither 'yahoo' nor 'com' will find it. However, if the period appears at either the beginning or end of a term, it is ignored during indexing. For example, a PubItem containing the term 'quick brown fox.' will be returned by a search for simply 'fox' - you do not need to search for 'fox.' as it appears in the PubItem.
11. **Stemming:** all search terms are stemmed, regardless of whether they occur in isolation, in a phrase, or in a thesaurus expansion. Therefore, the search 'San Francisco "Joint Venture"' will match PubItems that have 'San Francisco' and 'Joint Ventures' or 'Joint venturing'.
12. **Category Name Searching:** Quick Search applies your search term to category names as well as PubItem titles, descriptions, and content. A PubItem will appear in Quick Search's results if EITHER: 1) The PubItem's title, description, or contents contains the given search terms. 2) The PubItem resides in a category whose name matches the search given terms.
 - **Category Location:** for searching purposes, a PubItem is considered "residing in" all its parent categories as well as its most immediate category. For example, a PubItem that resides in "Topics>Antitrust>Mergers & Acquisitions>Hart-Scott-Rodino>Premerger Notification" will be returned in a Quick Search for 'Antitrust'.
 - Quick searches against category name are subject to term expansion through the thesaurus.

Note: *Category name matching uses an implicit PHRASE operator rather than the implicit AND operator used by the content search. Therefore, a search term of 'tax law' will yield PubItems that contain the strings 'tax law,' 'law tax,' and 'a new law was*

introduced raising inheritance tax.’ It will also yield PubItems that reside in a category named ‘tax law,’ but it will not yield PubItems that reside in the category named ‘law tax.’

How to use the search applications effectively

The following sections show users how to use the search forms associated with the available searches:

[“Advanced content search form” on page 277](#)

[“People search form” on page 290](#)

[“DMS search form” on page 293](#)

[“Client Matter search form” on page 294](#)

Advanced content search form

The following sections describe how to use the Advanced content search form to limit your search:

[“What you need to know before searching” on page 278](#)

[“Fine tuning your search ...” on page 279](#)

[“Text search methods ...” on page 280](#)

[“To limit by category ...” on page 281](#)

[“How category limiting is processed ...” on page 282](#)

[“Steps for limiting by category ...” on page 283](#)

[“Grouping your search results ...” on page 285](#)

[“To limit by view ...” on page 287](#)

[“To limit by date ...” on page 288](#)

[“To Limit by Client/Matter ...” on page 286](#)

[“Grouping your search results ...” on page 285](#)

[“Include Non-Publication Item Content” on page 286](#)

[“Submitting your query for results ...” on page 288](#)

WHAT YOU NEED TO KNOW BEFORE SEARCHING

The search terms you enter into the Text Search box will be searched against a Verity collection of PubItems compiled from your LawPort database. All fields in the Advanced content search form work to limit the search results. For a PubItem to appear in the results, it must meet all of the conditions you specify in the form. The more fields selected, the fewer the matching PubItems returned. You can select multiple “Limit by” options for an individual search, as they are designed to work together. The same is true for criteria: you can select as many search criteria (categories, views, PubItems) as you like from each of the Limit by options.

After you have completed the form, you can perform one of the following:

- Click Submit at the bottom of the form to process your search term.
- Click Clear at the bottom of the form if you want to clear all of your selections and start over.

Figure 9-3 below displays the Advanced content search form before any Limit by options have been selected.

Figure 9-3 Advanced content search form

Advanced

Text Search:

☒ Search for these words in any order
☐ Use precise Verity syntax ?

Text Search:

☐ Collapse Search Results

☐ Limit by Category

Group By ☒ Item Type ☐ Category

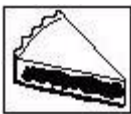
☐ Limit by Pub Item Type

☐ Limit by View

☐ Limit by Date

☐ Limit by Client/Matter

☐ Include non-Publication Item content



Traditional Intranet Slice

If you have purchased the Traditional Intranet Slice, you will not see the Limit by Category and Limit by Client/Matter options in the Advanced content search form, Figure 9-3.

FINE TUNING YOUR SEARCH ...

If a list of results appears after you submit your search, you can click the

button in the top left corner to return to your search form (in the state you left it in before you selected Submit) to make additional adjustments to your search.

TEXT SEARCH METHODS ...

To the right of the Text Search field, are two types of search methods for you to choose from: Search for these words in any order and Use precise Verity syntax.

These two options are described below:

- **Search for these words in any order** uses simple text search processing, which is very similar to Quick Search's processing. The one key difference is the way they handle categories: Quick Search applies your search terms to category names, PubItem titles, descriptions, and content; and the Advanced search, while it does not directly apply your search terms to category names, it does provide a Limit by Category option in the form, as well a field in which you can indicate the category name by which to limit your search. For more information on limiting your search by category, refer to ["To limit by category ..."](#) on page 281.
- **Use precise Verity Syntax** allows you to use a number of special operators to help you with your search. Choosing Help on Verity syntax will provide you with a list of Verity operators and examples on how to use them. This option uses explicit text search processing, which causes the text to be interpreted as Verity Query Language (VQL) syntax. Here are examples of valid VQL queries:
 - tax <PHRASE> law
 - <OR>(litigation, lawsuit)
 - California <near> (<OR>(litigation, lawsuit))

Note: Refer to ["More about Verity explicit text search"](#) on page 296 for more information on how your search terms are interpreted by Verity search.

COLLAPSE SEARCH RESULTS

You can Collapse Search Results if you want your search results to appear in a collapsed state (as opposed to an expanded state). The results will appear grouped by PubItem type or by Category, depending on which Group by option you check. Figure 9-4 below shows collapsed search results grouped by PubItem type.

Figure 9-4 Collapsed Search Results



TO LIMIT BY CATEGORY ...

When you limit your search term by category, the Publtems that reside in categories whose names match the search terms given are returned in the results. Refer to [“Steps for limiting by category ...” on page 283](#) to learn how to limit your search by category.

HOW CATEGORY LIMITING IS PROCESSED ...

When you limit your search by category, your search terms will be interpreted using the following processing:

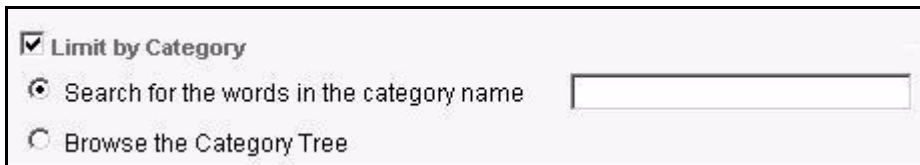
- **Implicit Phrase Operator:** the terms in the category name are implicitly formatted as a phrase. Any matching category must have the same words in the same order.
- **Category Location:** for searching purposes, a PubItem is considered “residing in” all its parent categories as well as its most immediate category. For example, a PubItem that resides in “Topics>Antitrust>Mergers & Acquisitions>Hart-Scott-Rodino>Premerger Notification” can be returned when the category name search is ‘antitrust’ (whether or not it is returned depends on the rest of the search arguments).
- **Thesaurus:** all terms entered in the category name field are subject to expansion with the thesaurus. As described above in Quick Search, any grouping of contiguous terms can constitute keys into the thesaurus. Note that since the implicit operator is phrase, any synonym expansions must occur in the same place as the original term relative to the other words in the term.
 - For example, given a search for ‘tax evasion penalty’ with a thesaurus which equates ‘penalty,’ ‘punishment,’ and ‘damages,’ any matching categories must contain ONE of the following three exact phrases: ‘tax evasion penalty,’ ‘tax evasion punishment,’ ‘tax evasion damages.’
 - In the previous example, if the thesaurus also equated ‘tax evasion’ with ‘IRS fraud,’ matching categories could have one of six exact phrases: ‘tax evasion penalty,’ ‘tax evasion punishment,’ ‘tax evasion damages,’ ‘IRS fraud penalty,’ ‘IRS fraud punishment,’ ‘IRS fraud damages.’
- **Quotes:** quotes are meaningless in this field because the implicit operator is already <PHRASE>.
- **Wildcards, case sensitivity, and Stemming:** all are identical to Quick Search, which is described in [“How quick search interprets your search terms ...” on page 272](#).

STEPS FOR LIMITING BY CATEGORY ...

Follow the steps below to learn how to limit your search by category:

1. Check, as in Figure 9-5, one the following two options described below:
 - **Search for the words in the category name** allows you to enter words to be searched against all category names in the database. For example, if you enter in Arkansas, your search will be searched against all categories whose names contain Arkansas.
 - **Browse the Category tree** allows you to browse the entire category taxonomy tree and select the category or categories by which to limit your search.

Figure 9-5 Searching category names



☒ Limit by Category

☒ Search for the words in the category name

☐ Browse the Category Tree

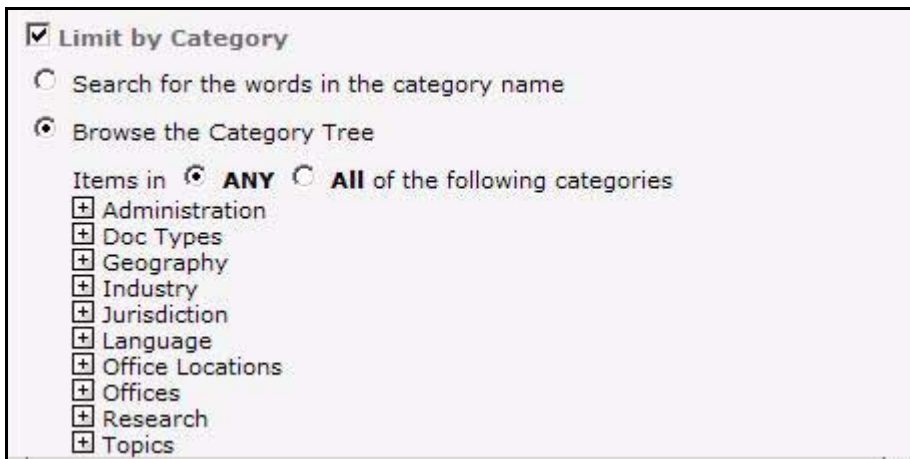
If you selected the first radio button, you can do one of the following:

- Continue limiting your search using the other Limit by options.
- Click submit to process your search.
- Choose Clear to clear the form and start over.

If you select Browse the Category Tree, follow the steps below:

2. Select, as in Figure 9-6 below, one of the two radio buttons: Any or All
 - **Any** indicates that you want results returned from any of the categories you select that match your search.
 - **All** indicates that you want results returned only if your search is matched in all of the categories you select.

Figure 9-6 Browsing the Category Tree



The screenshot shows a search interface with a section titled "Limit by Category" which is checked. Below this title are two radio buttons: "Search for the words in the category name" (unselected) and "Browse the Category Tree" (selected). Under the "Browse the Category Tree" option, there is a line that reads "Items in" followed by two radio buttons: "ANY" (selected) and "All of the following categories" (unselected). Below this line is a list of ten categories, each preceded by a plus sign in a square box: Administration, Doc Types, Geography, Industry, Jurisdiction, Language, Office Locations, Offices, Research, and Topics.

3. Next, perform one of the following:
 - Continue limiting your search using the remaining Limit by options.
 - Click Submit to process your search.
 - Click Clear to start over.

GROUPING YOUR SEARCH RESULTS ...

Choose either the Item type or Category radio button to indicate how you would like your results grouped. Item type groups your results by PubItem type (which you may want to choose if you selected more than one PubItem by which to limit your query). Category groups your results by Category (which you may want to choose if you selected more than one Category by which to limit your query). (See Figure 9-7 below.)

Figure 9-7 Group by



Group By ☒ Item Type ☐ Category

TO LIMIT BY PUBITEM ...

When you limit your search by PubItem, PubItems of the type you select that contain your search terms are returned. Your search terms are matched against PubItem titles, descriptions and content. To elicit results, your search term need only match one of the three: title, description, or content.

Figure 9-8 Limit by PubItem



☒ Limit by Pub Item Type

<input type="checkbox"/> Bio	<input type="checkbox"/> Collateral	<input type="checkbox"/> Document	<input type="checkbox"/> Event
<input type="checkbox"/> Guide	<input type="checkbox"/> Help	<input type="checkbox"/> Miscellaneous	<input type="checkbox"/> News
<input type="checkbox"/> Newsletter	<input type="checkbox"/> Policy	<input type="checkbox"/> Proposal	<input type="checkbox"/> Research

TO LIMIT BY CLIENT/MATTER ...

Type the Client or Matter into the fields provided (as in Figure 9-11 below) to limit your query to a specific client or matter. When you limit by client or matter, any matching PubItems must be associated with the given client or matter name. The terms are interpreted with an implicit AND operator: PubItems will match if they have ALL of the search terms entered in the field. Also, the thesaurus is not applied, and punctuation rules, stemming, and wildcards are treated as described in Quick Search; refer to: "How quick search interprets your search terms ..." on page 276.

Figure 9-9 Limit by Client/Matter

The image shows a search form with a checkbox labeled "Limit by Client/Matter" which is checked. Below the checkbox are two text input fields: "Client Name" and "Matter Name". The form has a light purple background and a thin black border.

INCLUDE NON-PUBLICATION ITEM CONTENT

The Include Non-Publication Item content option allows you to search your firm's SharePoint-rendered views and Windows SharePoint Services (WSS) sites for non-PubItem content (e.g., web part lists, announcements and shared documents) that exists in the system. Again, for non-Published Item content to appear in the search results, non-Published Item content must exist in the system.

Note: Only content that is located in LawPort managed SharePoint sites will be searched, and in the context of the logged in user.

Also, the following must be met in the Advanced Content Search form in order for non-Published Item content to appear in the search results:

- The Search for these words in any order option is checked. If the Use precise Verity Syntax option is checked, the Include non-Publication Item content checkbox will not be selectable.
- None of the Limit by filters with the exception of Limit by Date or Limit by View are checked. Any other filters that are used in conjunction with these Limit by options will not produce search results that include Non-Published Item content. The Include non-Publication Item content checkbox, if selected, will be deselected and an Alert dialog box will appear informing the user that the checked Limit by options (e.g. everyone but Limit by Date and Limit by View) prevent the execution of a Non-Published Item content search.

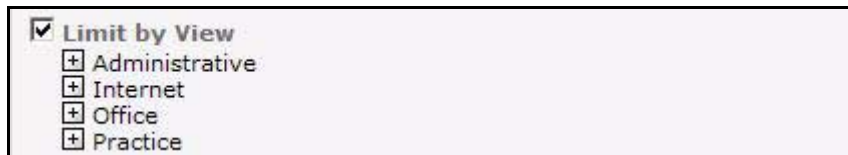
Note: If you check the "Group by Category" option, any non-Publication Item content, if available, will appear under the "Uncategorized" section in the search results.

To learn more about the WSS web parts that can contain non-Published Item content, refer to the ["Components and Web Parts" on page 30](#) of this guide. Also, ask your LawPort Engagement Manager or LawPort administrator for help locating SharePoint documentation that provides detailed information on WSS web parts.

TO LIMIT BY VIEW ...

When you limit your search by View, PublItems associated with the views you select are returned. If you select more than one view, matches would need to occur in all views to elicit results. In other words, if you select the Dallas and San Francisco office views and a match is found in only the San Francisco office view, no results are returned, as a match needs to occur in both. You therefore may want to try one search at a time for each view you want searched, unless of course you want your search terms to occur in all. You can efficiently perform this by using the Refine you search option, that way you can compile your search results from each Limit by view search.

Figure 9-10 Limit by View

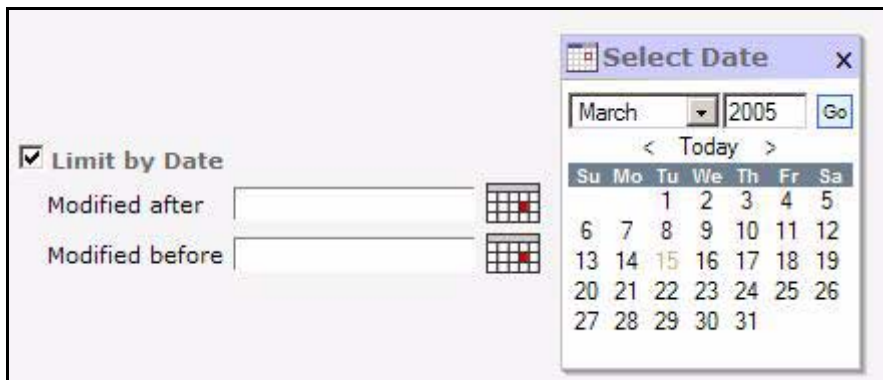


The image shows a search filter interface with a light purple background. At the top, there is a checked checkbox followed by the text "Limit by View". Below this, there is a list of four categories: "Administrative", "Internet", "Office", and "Practice". Each category is preceded by a small square icon containing a plus sign (+).

TO LIMIT BY DATE ...

Use Limit by Date to limit your query to items modified within a specific interval, after or before a specified date. Choose the calendar icons (as displayed in Figure 9-11 below) to specify dates.

Figure 9-11 Limit by Date



Note: Note: If you check the "Group by Category" option, any non-Publication Item content, if available, will appear under the "Uncategorized" section in the search results.

To learn more about the WSS web parts that can contain non-Published Item content, refer to the ["Components and Web Parts" on page 30](#) of this guide. Also, ask your LawPort Engagement Manager or LawPort administrator for help locating SharePoint documentation that provides detailed information on WSS web parts.

SUBMITTING YOUR QUERY FOR RESULTS ...


After you submit your query, any matches to it will be returned in a results list. This list displays your results grouped according to your Group by preference, and, for each result, provides you with information on the Title, Description, Author, Modification Date, Categories, Views and Relevancy (as displayed below). For easy browsing, all of the types are expandable groupings. You can click  to expand a group, as with Miscellaneous below. The Title column contains live links to the original PubItem indicated by the title.

Figure 9-12 Search results

number of hits: 20 records returned: 20

[Refine your search](#)

☐ Collateral (Result Count: 1)

☐ Document (Result Count: 6)

☐ Guide (Result Count: 2)

☐ Miscellaneous (Result Count: 1)

Title	Description	Author	Modification Date	Categories	Views	Relevancy
Chronology of Events	Significant events and dates	M'Bengue, Rosalie	Sep 25, 2003	No Categories Assigned	▪ Coca-Cola Bottlers Association	88%

☐ News (Result Count: 9)

☐ Research (Result Count: 1)

Note: Both active and expired items are returned in search results.

People search form

Figure 9-13 below displays the People search form, which allows you to search your firm's LawPort directory of employees. You can display this form by clicking Go to Advanced Search in Quick Search when its People search is activated. The fields in the People search form act as a filter, limiting your search results to what you specify. Once you have entered your search criteria into the form, you can click Search at the bottom of the form to process your search. Your search criteria is then matched against your firm's current LawPort employee directory. If your search produces results, they will appear in a list, as in Figure 9-14 below.

Note: You can multi-select fields using *ctrl + enter* for departments, practices, offices and job titles scroll boxes.

Note: The type of search fields you see in the form below will depend on what fields are populated in your database. For example, if you decide as a firm not to populate the Graduation Year fields in the database, the Graduation Year field would not appear in your firm's search form.

Figure 9-13 People search form

Last Name <input type="text"/>		First Name <input type="text"/>	
Phone <input type="text"/>		ext. <input type="text"/>	
		Email <input type="text"/>	
<input type="button" value="Search"/>		<input type="button" value="Reset"/>	
<input checked="" type="checkbox"/> Advanced Search			
Job Title		Practice	
<div>Select Title Administrator Analyst Assistant Administrator Assistant Manager Assistant to Chair</div>		<div>Select Practices Bankruptcy Corporate Employment Environmental Environmental Litigation</div>	
Office		Department	
<div>Select Offices Atlanta Bristol Chicago Dallas London</div>		<div>Select Departments Accounting Management Accounts Payables Accounts Receivables - Accounts Receivable Billing Advisors - Multi-Department Benefits</div>	
<input type="checkbox"/> Primary Group Only			
<input type="checkbox"/> Practice Group Lead		Region <input type="text" value="Select Regions"/>	
<input type="checkbox"/> Primary Department Lead			
<input type="checkbox"/> Primary Office			
Net ID <input type="text"/>			
Billing ID <input type="text"/>			
School Information			
Bar No./License		<input type="text" value="Select Licenses"/>	
School		<input type="text" value="Select Schools"/>	
Degree		<input type="text" value="Select Degrees"/>	
Graduation Year		<input type="text"/>	

If you click on the Email selected users in the top right corner (see Figure 9-14), all email addresses of the users you selected in the list will populate the To field of an Outlook email message, making it easy for you to notify select groups quickly and easily.

Figure 9-14 People search results list

15 records met your criteria. Email selected users

<input type="checkbox"/>	Email	Name	Title	Office	Department	Phone	Practice
<input checked="" type="checkbox"/>		Benson-Smith, Gigi	Manager	National Office	Marketing	(415) 393-8244	
<input checked="" type="checkbox"/>		Goldsmith, Aren	Associate Attorney	New York	Attorneys - Unassigned	(213) 229-7591	Litigation, General* Global Finance Intellectual Property, Transactional
<input checked="" type="checkbox"/>		Smith, Alia	Associate Attorney	New York	Attorneys - Unassigned	(212) 351-4091	Litigation, General* Emerging

DMS search form

The DMS search form, allows users to search your firm's Document Management System for documents and files. You can display this form by clicking on Go to Advanced Search in Quick Search when the DMS search is activated. The fields in the DMS search form act as a filter, limiting your search results to what you specify in the form. This search form includes a Databases scroll box from which you can select (as with the multi-selected: Corporate, IP, and Litigation below) multiple databases by which to limit your search. As indicated by Figure 9-15, the DMS search returns search results below its search form. In addition, you can select the More>> button to reveal even more search fields.

Figure 9-15 DMS search form

The screenshot shows the 'DMS Search' interface. It features several input fields: 'Document Title', 'Document #' (with '1' entered), 'Client', 'Author', 'Matter', 'Version', and 'Full Text' (with a help icon). A 'Databases' scroll box on the right lists 'ADMIN', 'CORPORATE', 'IP', 'LITIGATION', and 'SECURITIES'. Below the fields are 'Search', 'Reset', and 'More >>' buttons. The results section, titled 'Document List:', shows a table with 2 results. The table has columns: Library, Description, Doc., Ver., Edit, and Author. The results are from the 'LITIGATION' and 'IP' libraries.

Library	Description	Doc.	Ver.	Edit	Author
LITIGATION	FirstDoc	1	12	9/27/2002 4:56 PM	pkadiyala
IP	TestImport_0513_2	1	1	5/13/2002 10:07 AM	pkadiyala

Note: To access DMS, users must have a license (licences are generally issued per-user and not per-company) to run the WorkSite, PowerDocs or DocsOpen programs.

Client Matter search form

Figure 9-16 below displays the Client Matter search form. You can access this search form by clicking Go to Advanced Search in Quick Search when its Client Matter search is activated. All fields in the Client Matter search form act as a filter, limiting your search according to what you specify in the form. For a client or matter to appear in the results, it must meet all of the conditions you specify in the form.

The list below describes the fields in the Client Matter search form:

- Client Name and Client Number allow you to enter the client name and/or client number you want searched. If no Matter name is specified together with a Client name in a search, only Client names will be returned.
- Matter Name and Matter Number allow you to enter the matter name and/or matter number you want searched.
- Attorney/Timekeeper allows you to search for clients and matters associated with a specific Attorney and/or Timekeeper. Keep in mind that all Attorneys can be Timekeepers, but not all Timekeepers are Attorneys.
- Personnel Type allows you to limit your search by a specific personnel type in the list.
- Matter Status allows you to limit your search by one of three status options: Open, Closed or Open & Closed.
- Date allows you to specify a date range. This date range applies to matter open dates only. The beginning date indicates that you want matters that have been opened on or after the date specified and the ending date indicates that you want matters opened on or before the date specified.

The search results returned from a Client Matter search will appear listed below the search form. The information listed in all of the columns are hyperlinks to the specific client or matter views. Also, you can use the Return Rows pull-down to limit your search results to 10, 20, 50, 100 or 500 rows, as well as sort information that appears in the columns.

Note: When searching, you can specify an asterisk as a wildcard in client and matter name fields. This will allow you to, when performing a client matter search, to get the matching clients' matters back in your results as well.

Figure 9-16 Client/Matters search form

LawPort

Client Matter Search

Application

Clients & Matters

Client Name

Matter Name

Practice Firm Personal Tools

Search - Clients and Matters

Client Name:

sprint

Client Number:

Matter Name:

Matter Number:

Attorney/Timekeeper:

Personnel Type:

Select Personnel Type

Billing Attorney

Originating Attorney

Matter Status:

Open & Closed

Date Range:

to

?

Search

Clear

Search Results

Return:

500

Rows

Returned: 2 client(s) 0 matter(s)

Client Number:	Client Name:	Matter Number:	Matter Name:
00300	Sprint Corporation		
03739	Sprint Capital Corporation		

More about Verity explicit text search

The following provides more information on how your search queries are interpreted by Verity search:

1. **No Implicit Operator:** multiple terms without an operator will return unreliable results. A single term is considered valid, but two terms with a space between them are not valid. Thus 'jury trial' is not valid. However 'jury <AND> trial' is valid.
2. **Title, Description, and Content searching:** VQL (Verity Query Language) normally uses the <IN> clause to reference "zones" within which the search terms are applied. In LawPort explicit text search, there is always an implicit trailing <IN> clause which specifies that searches are applied to PubItem titles, descriptions, and content. Therefore, you should not include an <IN> clause in your search.
3. **ONLY Verity Syntax allowed:** anything that is not valid Verity syntax will return unreliable results.
 - For example, the term 'six flags' is not valid Verity syntax, because it lacks an operator. Valid strings include 'six <PHRASE> flags' or '<PHRASE>(six,flags)'.
 - The term 'coca-cola' is not valid verity syntax, because the hyphen is interpreted as a space. A valid query would be 'coca <AND> cola'.
4. **Wildcards (* and ?):** wildcards are allowed, and behave as described above for Quick Search. Terms with wildcards can be preceded by the <wildcard> operator, but don't have to be.
5. **Thesaurus Expansions:** Unlike Simple Text Search, Explicit Text Search does not automatically expand terms with the thesaurus. To expand a term through the thesaurus, you should precede it with the <THESAURUS> operator. In explicit text search, only single-term thesaurus entries can be expanded.
6. **Double Quotes:** quotes are meaningless; using them will return unreliable results.
7. **Case Sensitivity:** explicit search is not case sensitive.

-
8. **Punctuation Rules:** punctuation is handled differently from how it is handled in Quick Search and Simple Text Search. In explicit search, punctuation is stripped from the PubItem during indexing, but it is not stripped from the term during querying. Therefore, to find an instance of 'coca-cola' in a PubItem, you must search for 'coca <AND> cola' or 'coca <PHRASE> cola'
 9. **All of the punctuation marks:** '{}|][~!@#\$%^&()-+_:;,;\b are stripped during indexing and are not searchable.
 10. **Stemming:** all terms in Explicit Text Search are automatically stemmed, unless they are prefixed by the <WORD> operator. If the <WORD> operator is used, only the exact term given will match.