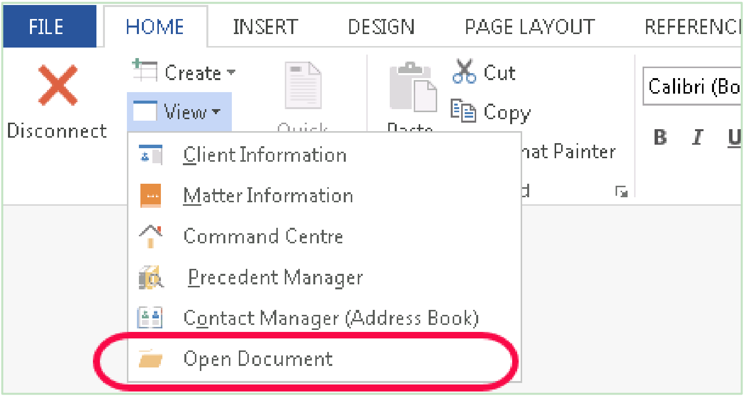
MatterSphere – Document Searching

Why use Document Search?

Sometimes searching for the correct document can be difficult. You can't remember what it is named, or perhaps the matter it is saved to. You just want quick access to recent documents in MatterSphere.

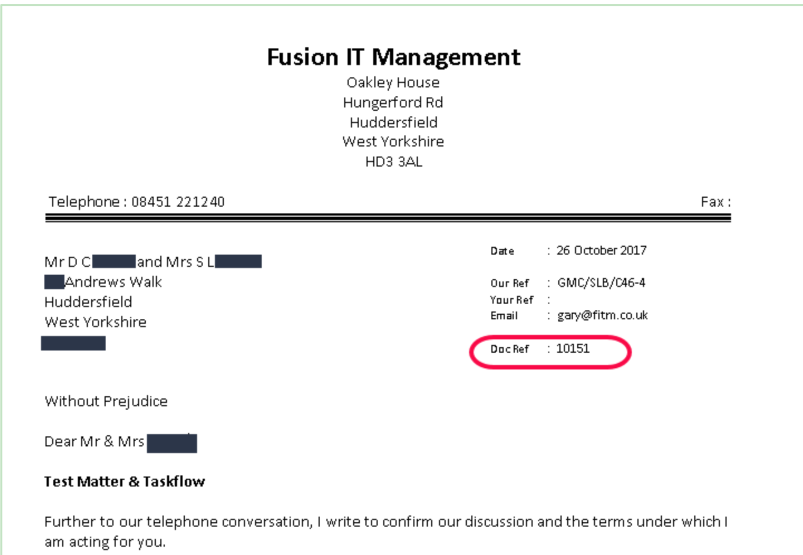
Finding Documents

*Click on **View** on the Ribbon > **Open Document***



Document ID

Enter the document ID number which can usually be found on a printed copy of the document you require.



Fusion IT Management
Oakley House
Hungerford Rd
Huddersfield
West Yorkshire
HD3 3AL

Telephone : 08451 221240 Fax :

Mr D C[redacted]and Mrs S L[redacted]
[redacted]Andrews Walk
Huddersfield
West Yorkshire
[redacted]

Date : 26 October 2017
Our Ref : GMC/SLB/C46-4
Your Ref :
Email : gary@fitm.co.uk
Doc Ref : 10151

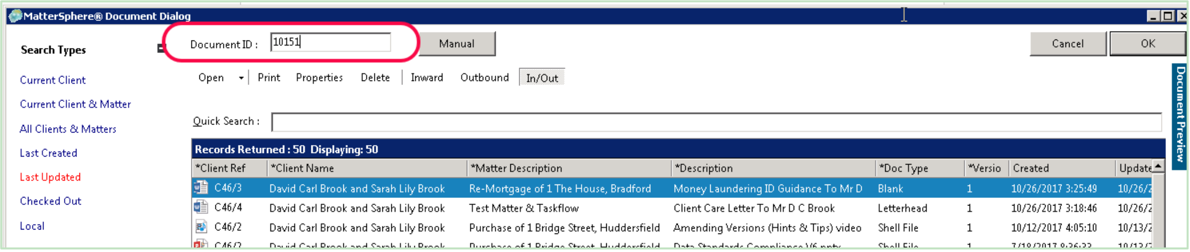
Without Prejudice

Dear Mr & Mrs [redacted]

Test Matter & Taskflow

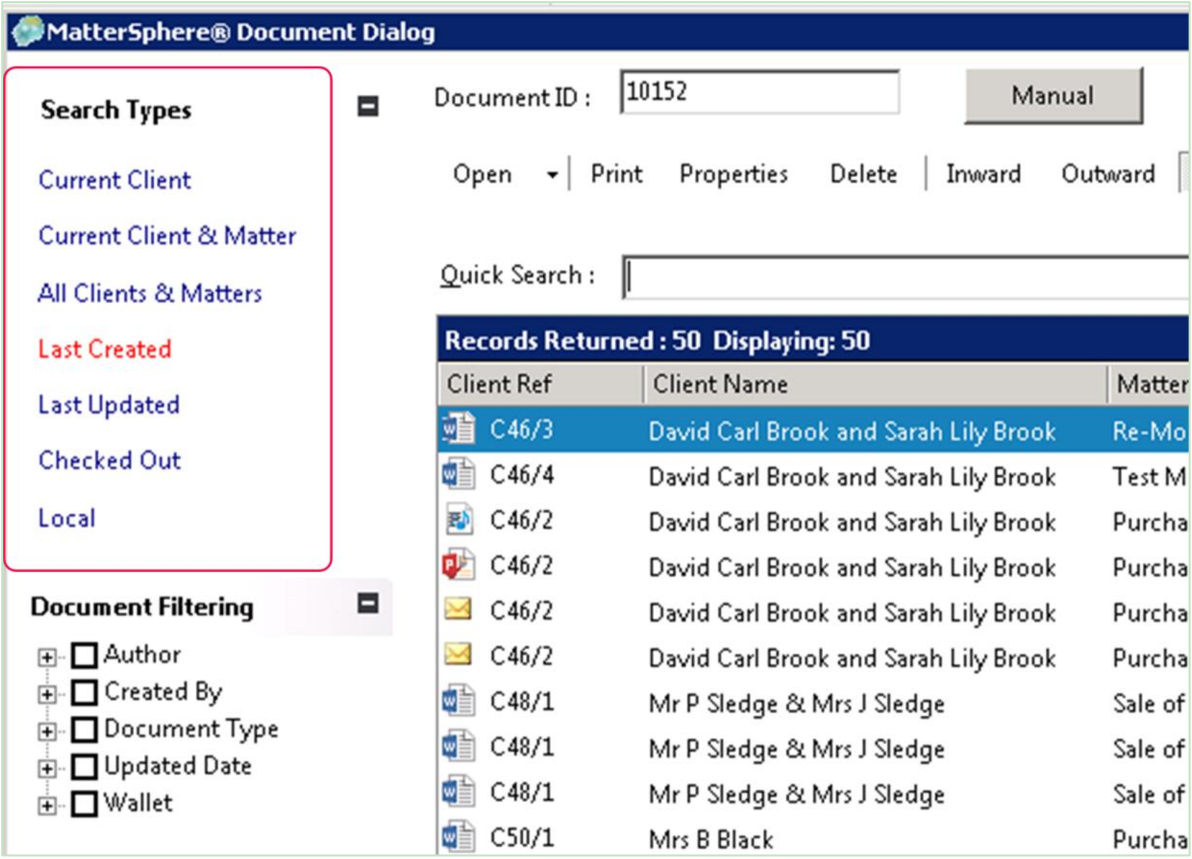
Further to our telephone conversation, I write to confirm our discussion and the terms under which I am acting for you.

*Type the number into the box at the top and **Enter***



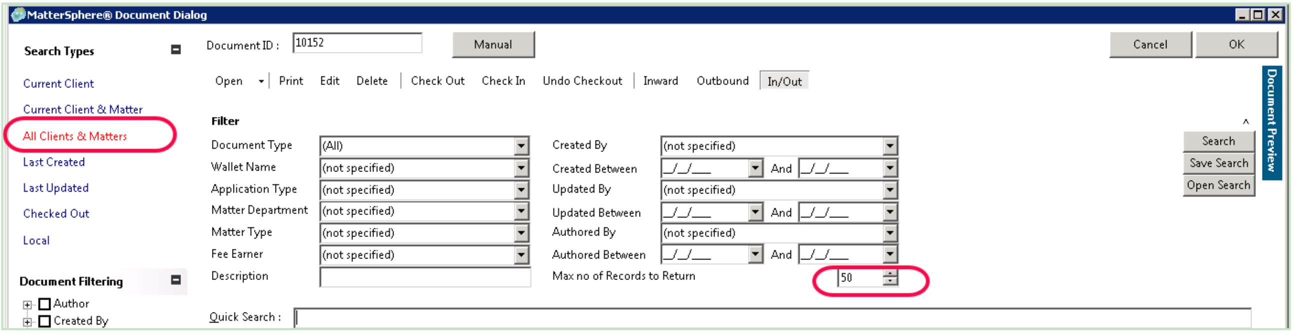
The document will open immediately.

Search Types



Current Client – Will take you into the Client selection screen
Current Client & Matter – Will take you into the Matter selection screen
All Clients & Matters – See section below
Last created – Displays the last 50 only of the documents you created
Last updated – Displays the last 50 only of the documents you updated
Checked out – Displays any documents you currently have checked out of MatterSphere
Local – Will take you into your computer search facility

All Clients & Matters Search Type



NB: Any searching you do on here be aware that only the top 50 results will be displayed unless otherwise specified. (as above)

Warning: Performing a search against all documents i.e. entering 0 in records returned may result in a very slow result and slowness in the whole database while the search is performed. If you must do this please narrow down using as many filters as possible to reduce the impact on the system.

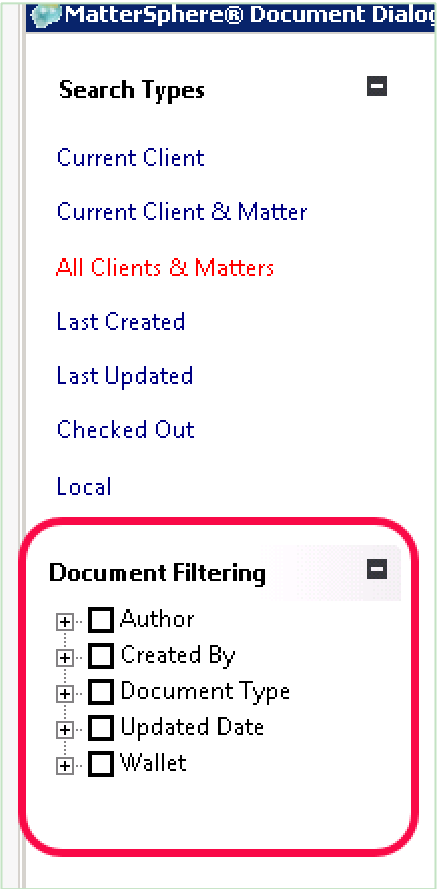
*Select **All Clients & Matters***

*Select from the **Filters** shown by clicking on drop down lists and choosing required fields.*

Document Type – What type of document is it. i.e. File Note, Letter, Telephone Note in etc.
Wallet Name – Is it in a particular wallet i.e. Correspondence, Key Documents etc.
Application Type – Which application was used to produce the document i.e. Word, Excel, PDF, Oyez, Laserform etc.
Matter Department – Which Department produced the document i.e Property, Employment, Litigation etc.
Matter Type – You will not be able to select this unless a Matter Department is selected. i.e. Residential Sale, Residential Purchase etc.
Fee Earner – Who is the FE on the Matter
Description – Enter free text of the document title.
Created by – Who generated this document
Created Between – Enter start and end dates when you think it was created
Updated By – Who was the last person to update this document.
Updated Between – Enter start and end dates when you think it was last updated.
Authored by – Who is responsible for the matter the document was created under
Authored between – Enter start and end dates when you think it was authored.
Max No of Records to Return – See the Warnings above.

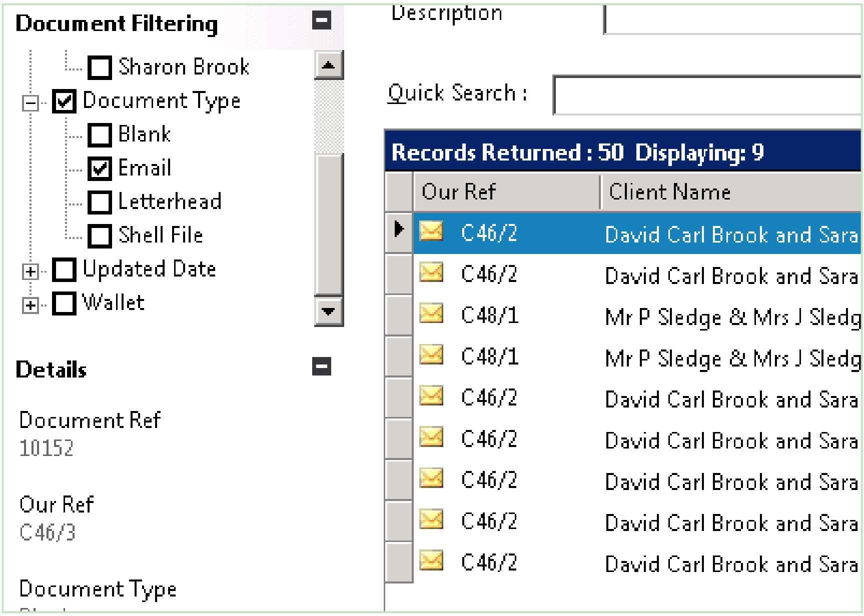
Document Filtering

Once you have your search results you can then start to narrow down further using filtering.



Click on the + to expand the various filters available.

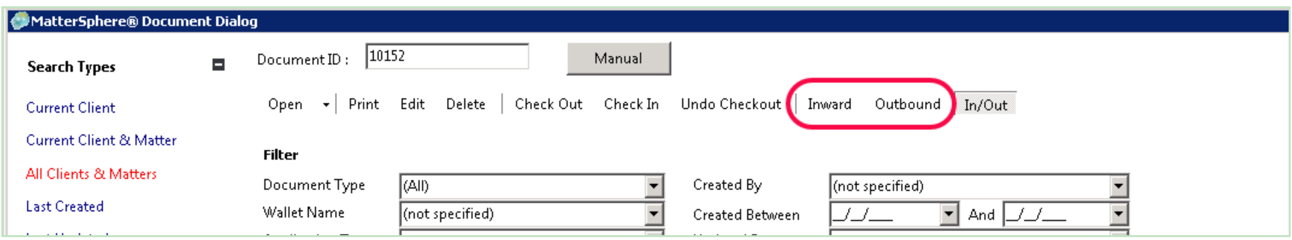
Click all or any required tick boxes to filter the results.



Inward/Outbound

The Inward and Outbound buttons can be found at the top of the document dialog box and you can use this tool to narrow down to incoming or outgoing correspondence or email.

NB: This must be applied before your filters are applied otherwise they will need re-applying.



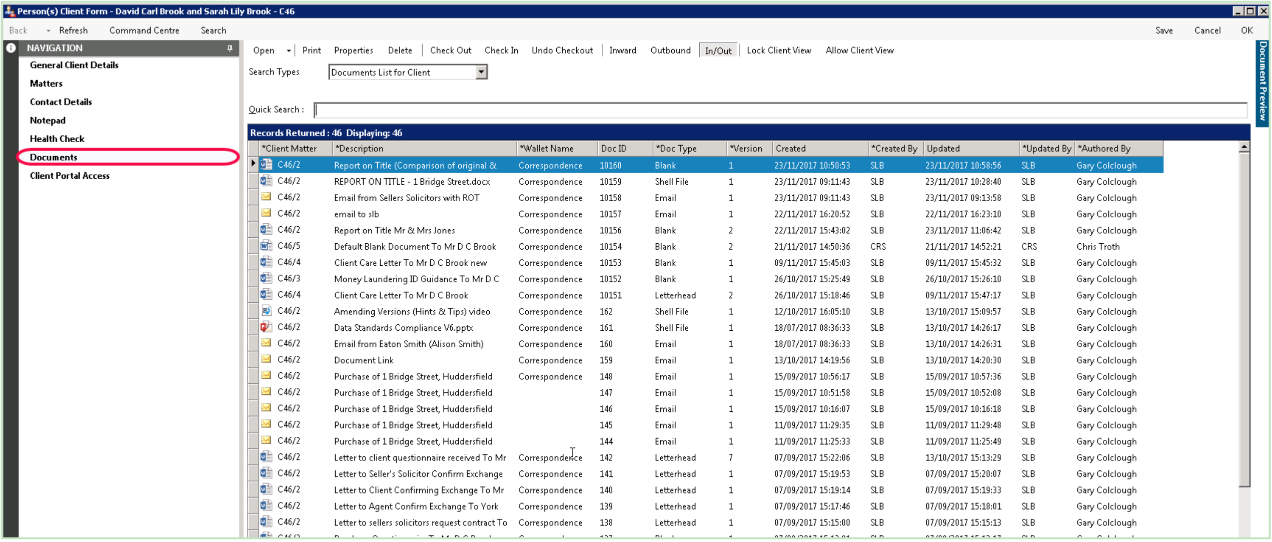
Client Documents

Looking for a document against a Client but not sure what matter?

You can search for documents against a Client.

Navigate to your specific Client

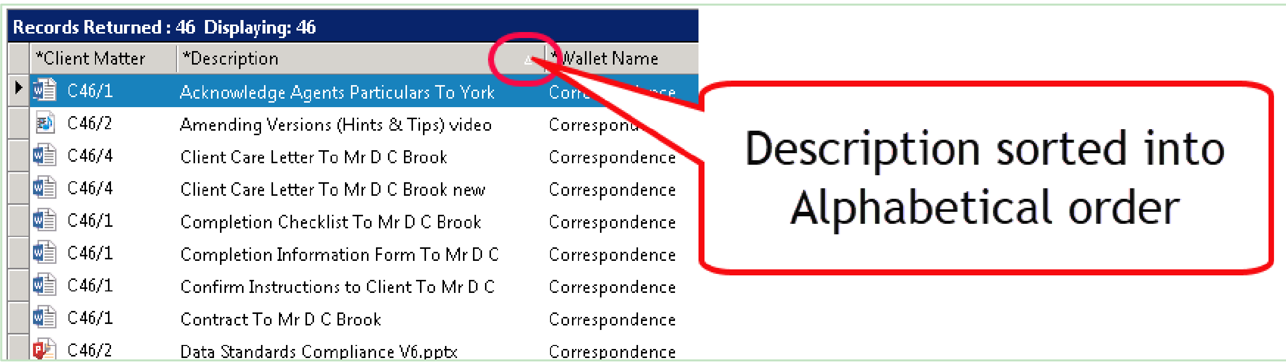
On the Client record select ***Documents***



This list shows all document which relate to the client across all matters. You can narrow down the search by using **Quick Search.** You can type in here any text or numbers referred to in the list so this can be from:

Client Matter No
Description
Wallet Name
Doc Type
Created by
Updated By
Authored By

Alternatively, you can sort the fields into order by clicking on the headings



Double Click to open the required document.

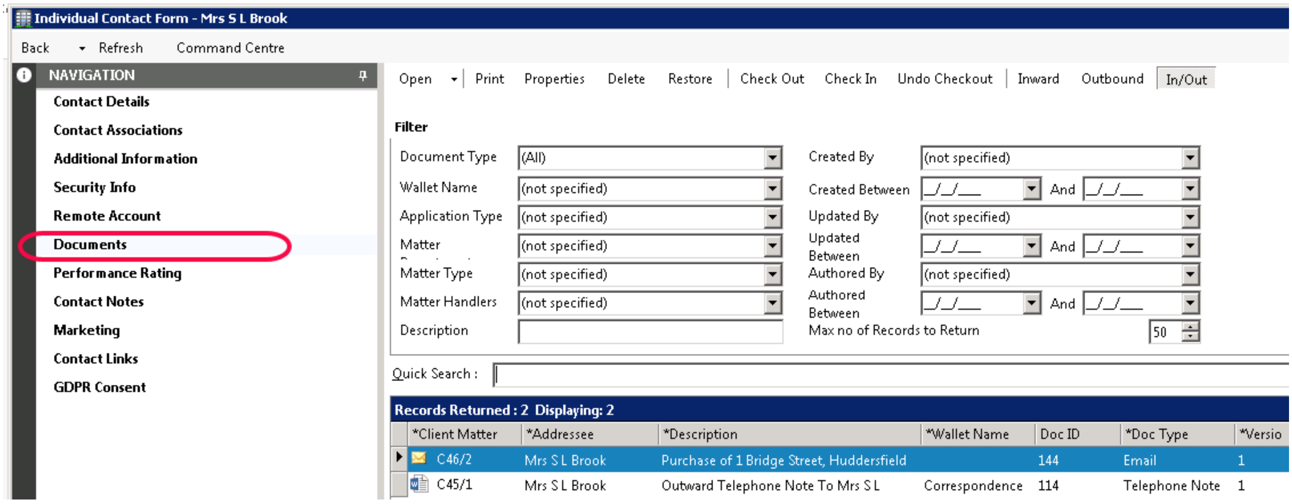
Contact Documents

You can also find documents that are associated to specific Contacts.

In this scenario, you would be able to find all documents across all cases that a particular firm or individual were involved with.

Navigate to the Contact you wish to view

On the Contact record select ***Documents***



The above screen will display all documents and the Client/Matter on which they are on.

Use the Filters as per document filtering to narrow down the document numbers.

- ⓘ As with all searching you can reduce the time you spend searching for documents by using effective and correct naming. E.g.
- ⓘ Naming Emails with details of who they are from, to and what they are about can minimise search time spent
- ⓘ Correct and Clear document naming and extra detail in descriptions of letters will help you to identify the correct documents quicker
- ⓘ Remember all documents can be re-named as they are attached to emails to be sent out so the recipient does not need to see the same description as in the document list.