

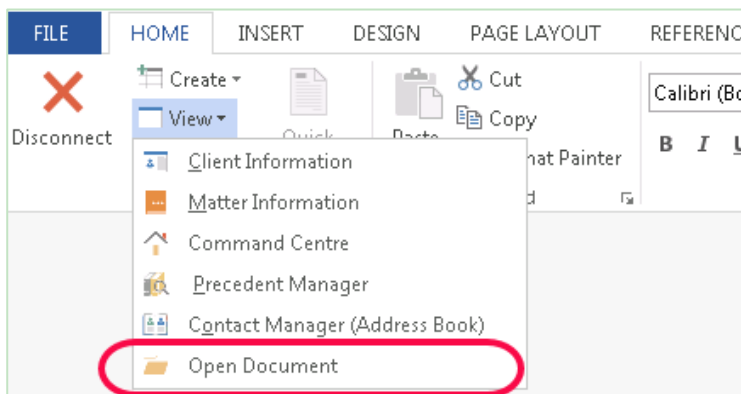
MatterSphere – Document Searching

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.

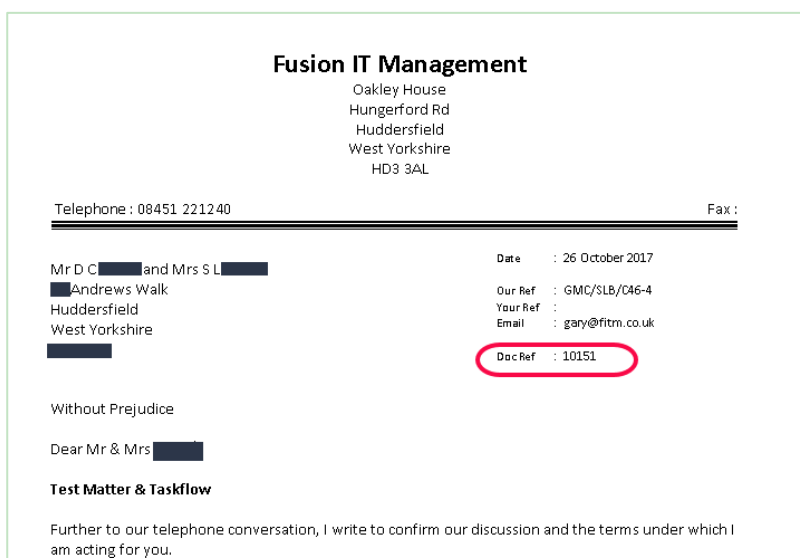
Finding Documents

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

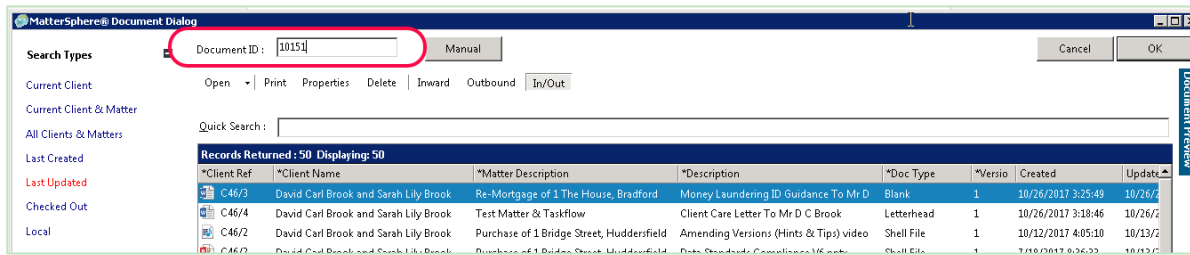


Document ID

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

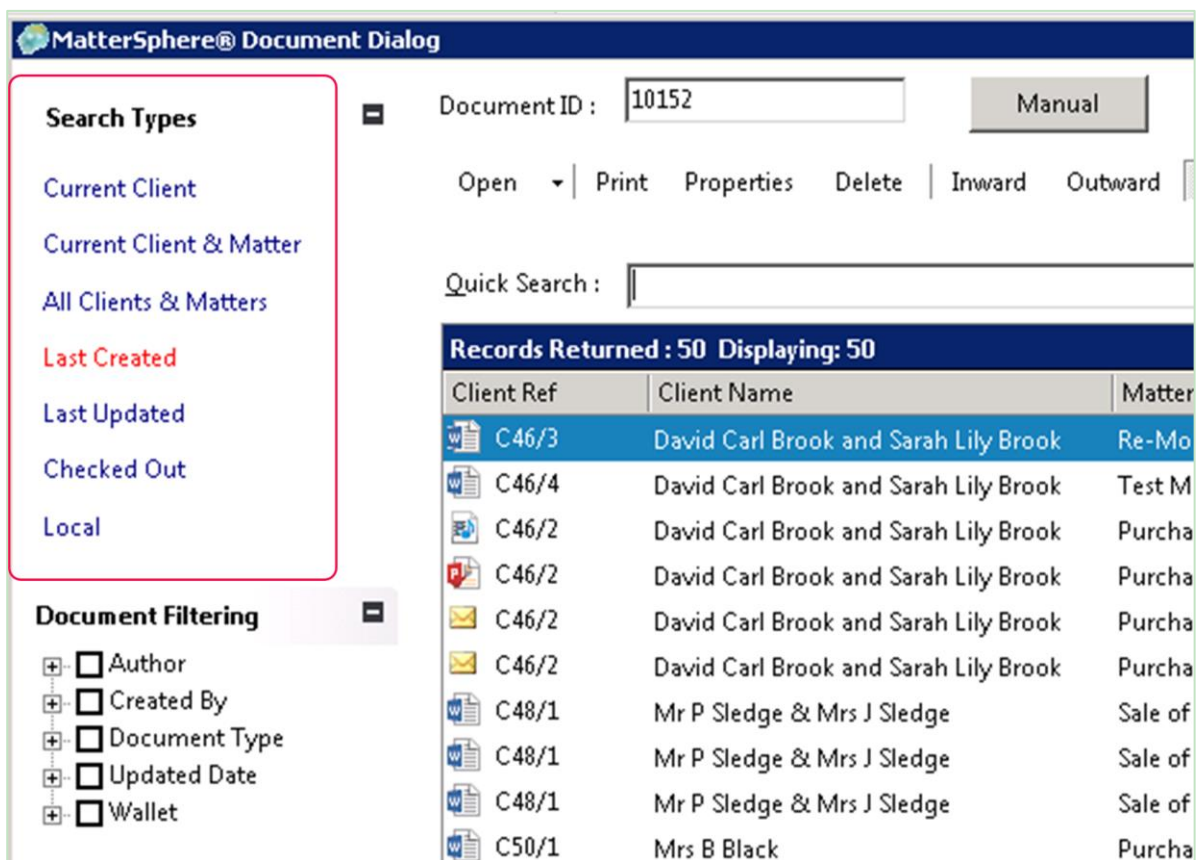


☞ Type the number into the box at the top and **Enter**



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

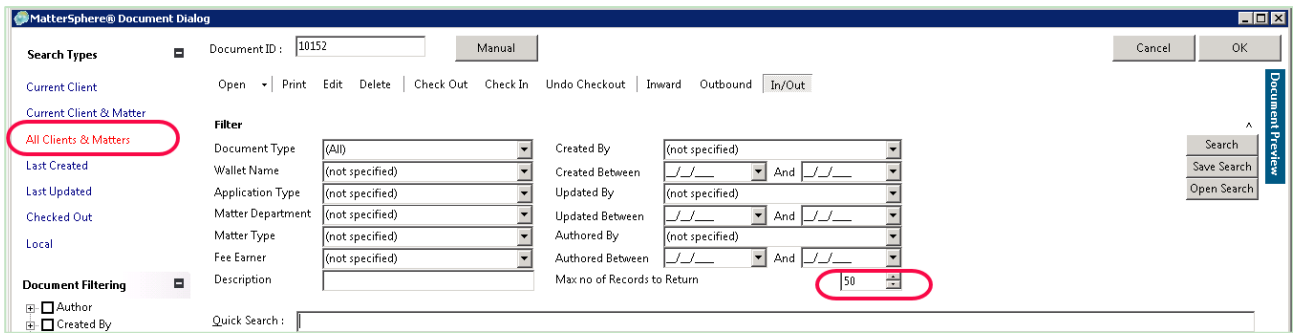
Last created – Displays the last 50 only of the documents you created

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.

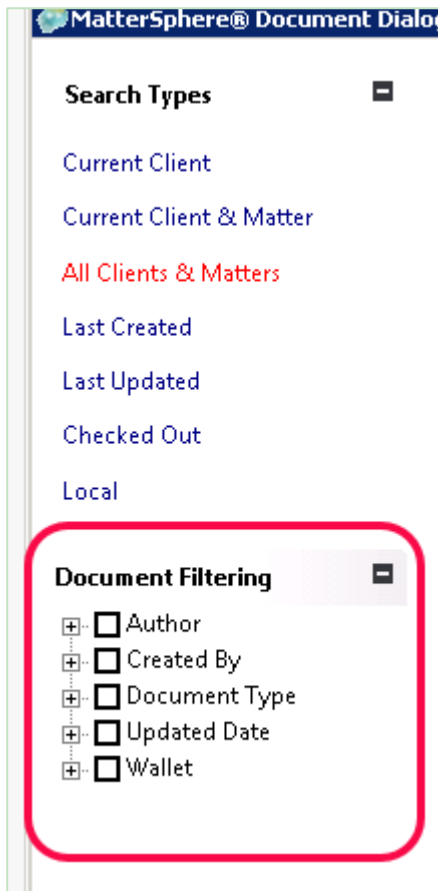
Authored by – Who is responsible for the matter the document was created under

Authored between – Enter start and end dates when you think it was authored.

Max No of Records to Return – See the Warnings above.

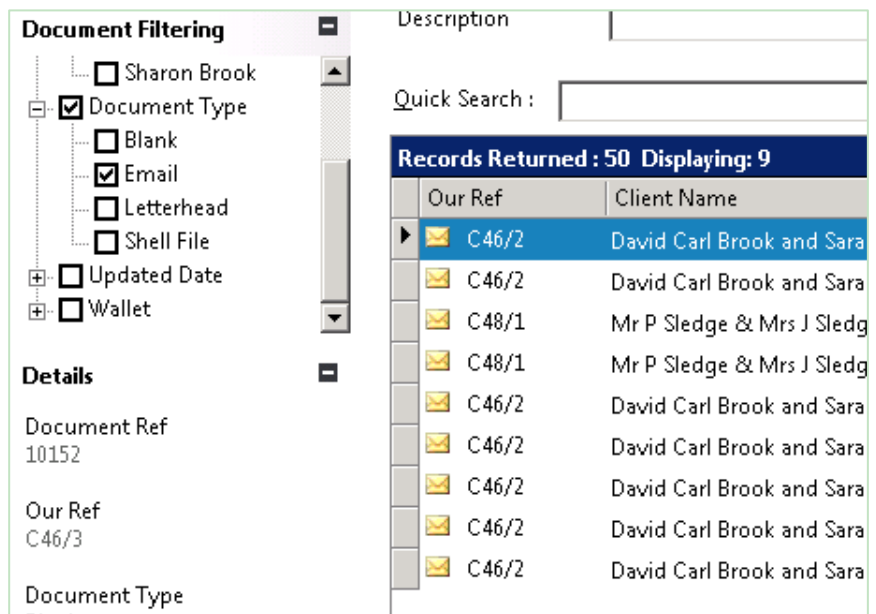
Document Filtering

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.

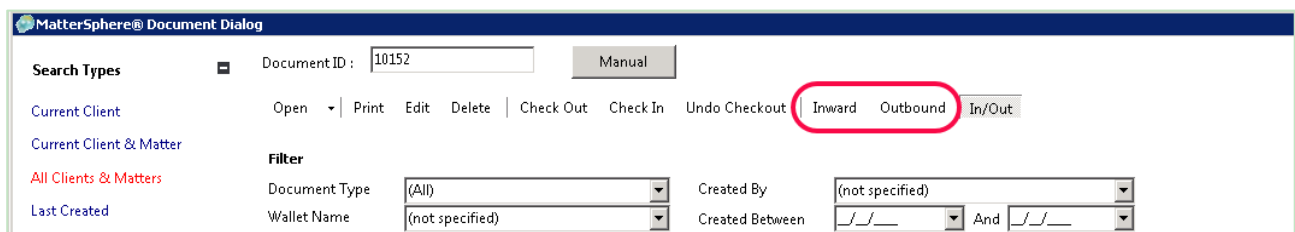
Click all or any required tick boxes to filter the results.



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.



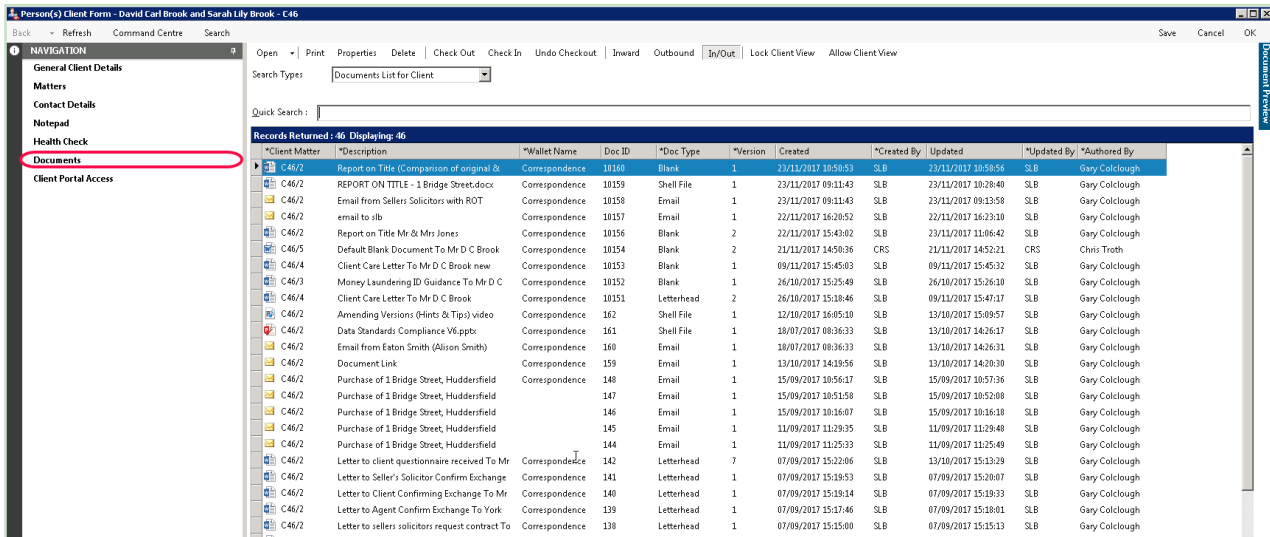
Client Documents

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***

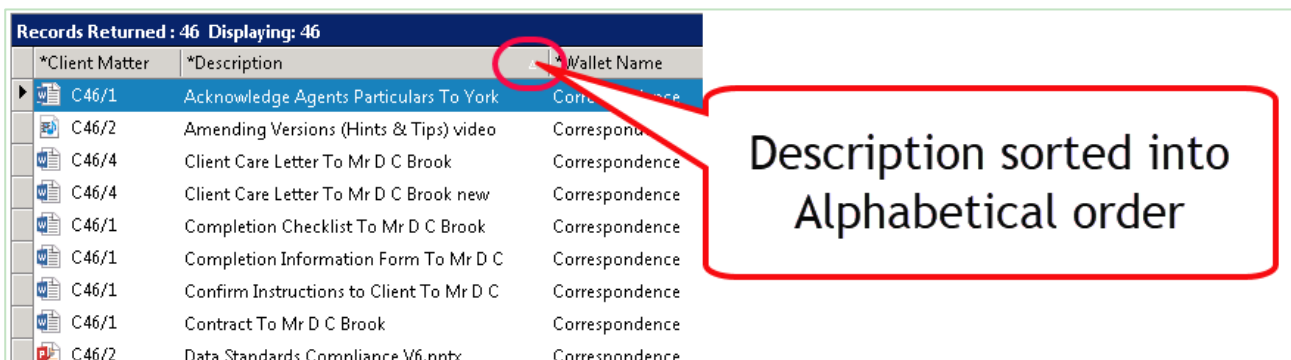


*Client Matter	*Description	*Wallet Name	Doc ID	*Doc Type	*Version	Created	*Created By	Updated	*Updated By	*Authored By
C46/2	Report on Title (Comparison of original & REPORT ON TITLE - 1 Bridge Street.docx	Correspondence	10158	Blank	1	23/11/2017 10:50:53	SLB	23/11/2017 10:58:56	SLB	Gary Colclough
C46/2	REPORT ON TITLE - 1 Bridge Street.docx	Correspondence	10159	Shell File	1	23/11/2017 09:11:43	SLB	23/11/2017 10:28:40	SLB	Gary Colclough
C46/2	Email from Sellers Solicitors with ROT	Correspondence	10158	Email	1	23/11/2017 09:11:43	SLB	23/11/2017 09:13:58	SLB	Gary Colclough
C46/2	email to jlb	Correspondence	10157	Email	1	22/11/2017 16:20:52	SLB	22/11/2017 16:23:10	SLB	Gary Colclough
C46/2	Report on Title Mr & Mrs Jones	Correspondence	10156	Blank	2	22/11/2017 15:43:02	SLB	23/11/2017 11:06:42	SLB	Gary Colclough
C46/5	Default Blank Document To Mr D C Brook	Correspondence	10154	Blank	2	21/11/2017 14:50:36	CRS	21/11/2017 14:52:21	CRS	Chris Troth
C46/4	Client Care Letter To Mr D C Brook new	Correspondence	10153	Blank	1	09/11/2017 15:45:03	SLB	09/11/2017 15:45:32	SLB	Gary Colclough
C46/3	Money Laundering ID Guidance To Mr D C	Correspondence	10152	Blank	1	26/10/2017 15:25:49	SLB	26/10/2017 15:26:10	SLB	Gary Colclough
C46/4	Client Care Letter To Mr D C Brook	Correspondence	10151	Letterhead	2	26/10/2017 15:18:46	SLB	09/11/2017 15:47:17	SLB	Gary Colclough
C46/2	Amending Versions (Hints & Tips) video	Correspondence	162	Shell File	1	12/10/2017 16:05:10	SLB	13/10/2017 15:09:57	SLB	Gary Colclough
C46/2	Data Standards Compliance V6.pptx	Correspondence	161	Shell File	1	18/07/2017 08:36:33	SLB	13/10/2017 14:26:17	SLB	Gary Colclough
C46/2	Email from Eaton Smith (Alison Smith)	Correspondence	160	Email	1	18/07/2017 08:36:33	SLB	13/10/2017 14:26:31	SLB	Gary Colclough
C46/2	Document Link	Correspondence	159	Email	1	13/10/2017 14:19:56	SLB	13/10/2017 14:20:30	SLB	Gary Colclough
C46/2	Purchase of 1 Bridge Street, Huddersfield	Correspondence	148	Email	1	15/09/2017 10:56:17	SLB	15/09/2017 10:57:36	SLB	Gary Colclough
C46/2	Purchase of 1 Bridge Street, Huddersfield	Correspondence	147	Email	1	15/09/2017 10:51:59	SLB	15/09/2017 10:52:08	SLB	Gary Colclough
C46/2	Purchase of 1 Bridge Street, Huddersfield	Correspondence	146	Email	1	15/09/2017 10:16:07	SLB	15/09/2017 10:16:18	SLB	Gary Colclough
C46/2	Purchase of 1 Bridge Street, Huddersfield	Correspondence	145	Email	1	11/09/2017 11:29:35	SLB	11/09/2017 11:29:48	SLB	Gary Colclough
C46/2	Purchase of 1 Bridge Street, Huddersfield	Correspondence	144	Email	1	11/09/2017 11:25:33	SLB	11/09/2017 11:25:49	SLB	Gary Colclough
C46/2	Letter to client questionnaire received To Mr	Correspondence	142	Letterhead	7	07/09/2017 15:22:06	SLB	13/10/2017 15:13:29	SLB	Gary Colclough
C46/2	Letter to Seller's Solicitor Confirm Exchange	Correspondence	141	Letterhead	1	07/09/2017 15:19:53	SLB	07/09/2017 15:20:07	SLB	Gary Colclough
C46/2	Letter to Client Confirming Exchange To Mr	Correspondence	140	Letterhead	1	07/09/2017 15:19:14	SLB	07/09/2017 15:19:33	SLB	Gary Colclough
C46/2	Letter to Agent Confirm Exchange To York	Correspondence	139	Letterhead	1	07/09/2017 15:17:46	SLB	07/09/2017 15:18:01	SLB	Gary Colclough
C46/2	Letter to sellers solicitors request contract To	Correspondence	138	Letterhead	1	07/09/2017 15:15:00	SLB	07/09/2017 15:15:13	SLB	Gary Colclough

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



*Client Matter	*Description	*Wallet Name
C46/1	Acknowledge Agents Particulars To York	Correspondence
C46/2	Amending Versions (Hints & Tips) video	Correspondence
C46/4	Client Care Letter To Mr D C Brook	Correspondence
C46/4	Client Care Letter To Mr D C Brook new	Correspondence
C46/1	Completion Checklist To Mr D C Brook	Correspondence
C46/1	Completion Information Form To Mr D C	Correspondence
C46/1	Confirm Instructions to Client To Mr D C	Correspondence
C46/1	Contract To Mr D C Brook	Correspondence
C46/2	Data Standards Compliance V6.pptx	Correspondence

🔑 *Double Click to open the required document.*

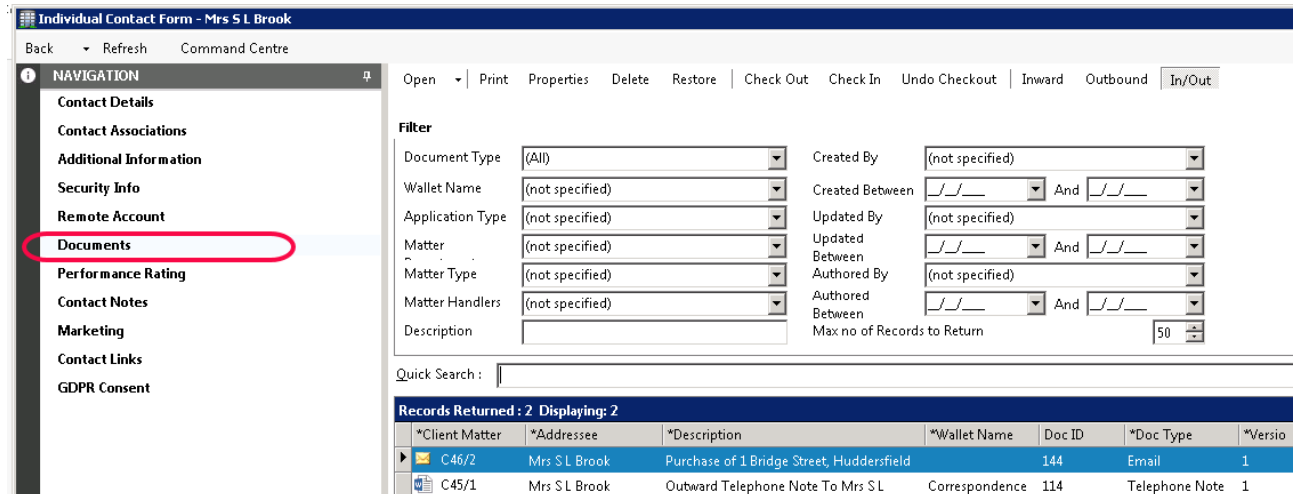
Contact Documents

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**



Individual Contact Form - Mrs S L Brook

Back Refresh Command Centre

NAVIGATION

- Contact Details
- Contact Associations
- Additional Information
- Security Info
- Remote Account
- Documents**
- Performance Rating
- Contact Notes
- Marketing
- Contact Links
- GDPR Consent

Open Print Properties Delete Restore Check Out Check In Undo Checkout Inward Outbound In/Out

Filter

Document Type (All) Created By (not specified)

Wallet Name (not specified) Created Between / / And / /

Application Type (not specified) Updated By (not specified)

Matter (not specified) Updated Between / / And / /

Matter Type (not specified) Authored By (not specified)

Matter Handlers (not specified) Authored Between / / And / /

Description Max no of Records to Return 50

Quick Search :

Records Returned : 2 Displaying: 2

*Client Matter	*Addressee	*Description	*Wallet Name	Doc ID	*Doc Type	*Versio
C46/2	Mrs S L Brook	Purchase of 1 Bridge Street, Huddersfield		144	Email	1
C45/1	Mrs S L Brook	Outward Telephone Note To Mrs S L	Correspondence	114	Telephone Note	1

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.