

# PracticeMaster Search Guide









PracticeMaster

**Trust Accounting** 

Accounts Payable

General Ledger

#### TABS3.COM

#### PracticeMaster Search Guide

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## **PracticeMaster Search Guide**

### **Purpose of Guide**

The purpose of this Guide is to familiarize you with the different search features available within PracticeMaster. PracticeMaster offers many ways to search for information, including the Search Box, Conflict of Interest searching, Contact searching, Document searching, and Find and Replace.

Additional guides for separate software features are also available.

All guides are available on our website at:

Tabs3.com/support/docs.html

## **Types of Searches**

There are several different ways to search for information within PracticeMaster. The options available are:

Search Actions	Easily find windows and reports in the current application via Quick Launch <i>(page 6)</i> .
Search Box	Quickly filter information by doing a text search of the information available on the list ( <i>page 7</i> ).
Conflict of Interest Search	This powerful tool protects your firm from potential conflicts of interest by searching all files designated for the requested information <i>(page 10)</i> .
Contact Search	Simplify the way you locate contacts by searching for a specific contact instead of scrolling through a list <i>(page 13)</i> .
Document Search	Search the contents of email attachments and linked documents in the Document Management file <i>(page 17)</i> .
Find and Replace	Efficiently search for all instances of a word or phrase and replace it with alternate text ( <i>page 20</i> ).

These methods will be discussed in more detail in the following pages.

## **Search Actions**

The Search Actions box is available at the top of the Quick Launch.

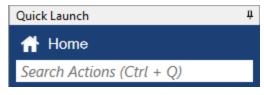


Figure 1, Search Actions

The Search Actions box is used to find actions in the current application. Actions consist of various windows and reports. As you enter characters in the box, a list of possible choices including the characters entered will be displayed, allowing you to easily select an action to launch. For example, searching for "check" will include Check for Updates and Data File Integrity Check in the list of options. In addition to the window names, common acronyms and alternate references are included. For example, searching for "attorney" in Tabs3 Billing will include all references to "timekeeper" in the list such as Timekeeper Information, Timekeeper Productivity Report, etc.

Once an action is selected, the action is launched and the action is added to the top of the Recent Actions list.

**More Info:** Details regarding additional Quick Launch functionality can be found in the *Administrator Guide*.

**Tip:** Use Ctrl + Q to jump to the Search Actions box.

## Search Box

The Search Box is available on the **List** tab of all files as well as the Matter Manager and Graphical Calendar.

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	Cor	ntact			(	lient Relate	d			Peop	le		
List	Address	Setup	Details	Court	Calendar	Journal	Note	Email	Phone	Document	Fee	Cost	
Client	Py Area of Dr	actico Pu	Catagony		Pulocation	\							
	By Area of Pr		Category (		By Location		Na	ame Search	Client	t Full Name			^
Client		lame	Category	Con		\		a <b>me Search</b> rson/Michae		<b>t Full Name</b> nel Larson			^
Client 10	ID 🔺 Client N	<b>lame</b> Michael	Category (	Con Lars	tact Name		La		l Micha				^

Figure 2, Search Box on List tab of Client file

당 Matter Manager - [100.00] Michael Larson				×
[100.00] Michael Larson - La	rson v. Bel-Cor			
100.00 Larson/Michael - Larson v. Bel-Cor	<ul> <li>All Activity</li> </ul>	• 🗈 🖨 🕼 🍐 😋	Search List (Ctrl+E)	8
Michael Larson	Туре	Description	Date/Time ⊽ Conve	< Quio
	5 2 6			<u>u</u>

Figure 3, Search Box in Matter Manager

당 Wee	kly Calendar					- • ×
User:	ALL	🗸 🍓 🦽 🗐	🖉 🕼 😋 💎	🏼 🔳 🔳 2 Week View 🗸	Search List (Ctrl+E)	۲
	Monday Tuesday	Wednesday	Thursday	Friday	Cat/Cup A	11.0000 1.11

Figure 4, Search Box in Weekly Calendar

Using the Search Box is easy. Simply type the text you are searching for in the Search Box and PracticeMaster will update the list to include only records that contain the specified text. While the list is being filtered, a status indicator to the left of the search box will

display the current status of the search, as shown in Figure 5. The red

indicator indicates that PracticeMaster is filtering results. The yellow Waiting indicator indicates that PracticeMaster is waiting for the user to finish entering

characters into the Search box. Finally, the green **Filtered** indicator indicates that the software has filtered the appropriate results and is ready to filter again. Keep in mind that it is not necessary to wait for the Filtered indicator to appear before selecting a record from the list.

당 Client							_				
🗋 ѷ 🛙	) 📮 🐰	661	BIU	* 🗈	o 🖸 🖸	🕗   🗸 🄇		iltered		Desc:"real estate"	× 🔊
	Cor	ntact				Client Relate	ed			Client ID	
List	Address	Setup	Details	Court	Calendar	Journal	Note	Email	Pho	Client Name	
Client	By Area of Pr	actice By	Category B	/ Attorney	By Location					Email Address	
Client I	D 🔺 Client N	Name		Cor	tact Name			Name Search	C	Work Description	real estate
12	1.01 Phillips/	Marcus		Phil	lips/Marcus			hillips/Marcus	. N	Fields	History

Figure 5, Search Box with Filtered indicator and Search pane

Entering text into the Search Box begins a search of every field in the current column layout for the specified text. You can also search specific fields using the Search Box.

Simply click the expand button to open the Search panel. The Search panel displays fields separately, allowing you to enter a search value for a specific field rather than the entire file. By default, the first three fields of the column layout are shown. If the field you want to search does not appear, click the **Fields** button to bring up a list of all fields available in the column layout, as shown below:

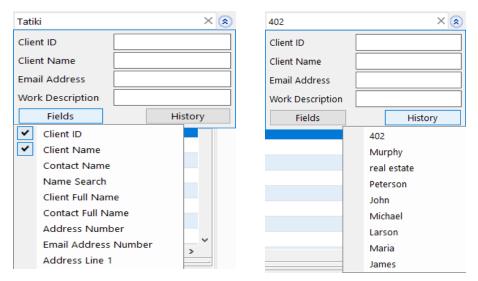


Figure 6, Search Panel with column layout fields

Figure 7, Search Panel with History

To add fields to the search panel, click the field name. Fields that have been added to the Search panel will be displayed with a check mark.

The **History** button shows a list of the ten most recent searches performed by the user for each column layout for each file. Clicking a value in the History list will perform the search again. To clear the text in the search box, click the X button in the Search Box.

**Tip:** Use Ctrl + E to jump to the Search box.

## **Conflict of Interest Search**

Menu:	Search   Conflict of Interest Search
Home:	All Actions   Search   Conflict of Interest Search
Quick Launch:	Conflict of Interest Search

One of the most important tasks in any law firm is conflict of interest searching. PracticeMaster's Conflict of Interest Search is a powerful tool designed to help your firm create and maintain ethical walls.

From the PracticeMaster Quick Launch, search for and select "Conflict of Interest Search."

🎉 Conflict of Interest Search			
Search for: JAMES TATIKI		~	Search Cancel
Phrase Match		Word Order	
○ Must match at least one	e word	<ul> <li>Anywhere within a record</li> <li>Any order within the same field (NEAR)</li> <li>Exact order within the same field</li> </ul>	
Search Options ☑ Match partial words ○ Starts with ◉ Contains (slower)		Phonetic Search	
Files to Search			
<ul> <li>✓ Client File</li> <li>✓ Contact File</li> <li>✓ Calendar File</li> <li>✓ Fee File</li> <li>✓ Cost File</li> <li>✓ Area of Practice Files</li> </ul>	<ul> <li>✓ Journal File</li> <li>✓ Client Notes</li> <li>✓ Email</li> <li>✓ Phone</li> <li>✓ Timer</li> <li>✓ Research</li> <li>✓ Billing Notes</li> </ul>	Document Management File Document Management Documents Search all document versions Hemail Attachments Linked Documents	
Print Criteria Page			

Figure 8, Conflict of Interest Search

Enter one or more words to be searched in the **Search for** field. You can also search for a phrase by enclosing each phrase in double quotes.

The options below the **Search For** field are used to filter the list of potential results. The **Phrase Match** section allows you to specify whether multiple-word searches should be considered as individual words or full phrases. The **Word Order** section determines search results for multi-word searches based on the position of the words within a field and the selected option. You can also choose to **Match Partial Words** and run a

**Phonetic Search** by selecting the desired check box in the **Search Options** section. The **Files to Search** section allows you to select one or more files to conflict search.

### **Conflict of Interest Report**

Once you have selected the criteria to be used for the search, click the **Search** button. When the search has completed, you will be prompted to print the **Conflict of Interest Report**. Figure 9 shows the Conflict of Interest Report for the Conflict Search shown in Figure 8.

	Conflict of Interest Report ensen, Martin & Anderson, P.C.	Page: 1
Partial word search for: JAMES or TATIK	(1	
Knight/Elizabeth M. Attorney Contact Category: Attorney <i>Secondary Contact Name</i> : James/Tho	Contact mas	Modified: 08/19/2024
415.00 MegaConstruction Corporation Corporate Merger - Megabuilders and B <i>Contact Name</i> : <b>Tatiki</b> , Sr./ <b>James</b> R.	Client uilderCorp	Modified: 07/21/2024 Primary: 3 RPA
MegaConstruction Corporation Client Contact Category: Client <i>Contact Name</i> : <b>Tatiki</b> , Sr./ <b>James</b> R.	Contact	Modified: 08/07/2024
Tatiki, Sr./James R. Client Contact Contact Category: Client Contact <i>Full Name</i> : <b>James</b> R. <b>Tatiki</b> , Sr. <i>First Name</i> : <b>James</b> R. <i>Last Name</i> : <b>Tatiki</b> , Sr.	Contact	Modified: 06/01/2024
James/Thomas Attorney Contact Category: Attorney <i>Full Name</i> : Thomas <b>James</b> <i>Email Address 1</i> : t <b>james</b> @gljslaw.com <i>Last Name</i> : <b>James</b>	Contact	Modified: 11/22/2023

Figure 9, Conflict of Interest Report

Conflict of interest searching must be enabled before you can run a conflict of interest search. For information on enabling conflict of interest searching, see the PracticeMaster Help.

### **Training Videos**

You can view the following training video for more information. Clicking the link will open the training video in your browser. All training videos are also accessible in the Quick Launch by searching for and selecting "Training Videos," and at <u>Tabs3.com/video</u>.

Conflict of Interest Search Video

### **Contact Search**

Menu:	Search   Contact Search
Home:	All Actions   Search   Contact Search
Quick Launch:	Contact Search

The Contact Search provides a quick way to drill down to client-specific information such as email addresses and phone numbers. From the PracticeMaster Quick Launch, search for and select "Contact Search."

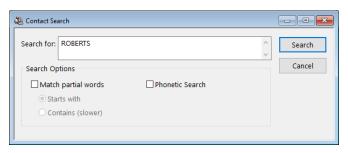


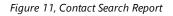
Figure 10, Contact Search

To perform a Contact Search, simply enter the word you want to search for in the **Search** for field and click **Search**. If you want to further refine your search, the **Search Options** section allows you to **Match partial words** and/or run a **Phonetic Search**.

### **Contact Search Report**

When the search has completed, you will be prompted to print the **Contact Search Report**. Figure 11 shows an example of the Contact Search Report generated for the Contact Search shown in Figure 10.

Date: 08/26/2024	Contact Search Report ensen, Martin & Anderson, P.C.	Page: 1
Whole word search for: ROBERTS		
Roberts/Linda M.	Contact	Modified: 08/19/2024
Attorney		
Contact Category: Attorney		
Full Name: Linda M. Roberts		
Organization: Roberts Law Office		
Last Name: Roberts		
Roberts Law Office	Contact	Modified: 07/21/2024
Attorney		
Contact Category: Attorney		
Full Name: Roberts Law Office		
Organization: Roberts Law Office		
Contact Name: Roberts/Linda M.		
Olsen/Jane	Contact	Modified: 07/21/2024
Attorney		
Contact Category: Attorney		
Organization: Roberts Law Office		
120.01 Klein/Daniel P.	Medical Services	Modified: 06/06/2024
Klein vs. Simmons Construction		Primary: 3 RPA
Patient Seen By (Doctor): Richard L. Re	oberts, MD	,
ROBERTS found in 4 records		



### **Configuring Fields for Searching**

PracticeMaster allows you to customize which fields to search when running Conflict of Interest and Contact searches. By including a field on a conflict of interest or contact search, you reduce the chances of overlooking a potential conflict, as the search will not return results for fields it is not configured to check. Search configuration is done via the File Maintenance window. This will require exclusive access to PracticeMaster. From the PracticeMaster Quick Launch, search for and select "File Maintenance." It is recommended that you make a backup when prompted.

Select the first file with fields you want to include in a search and click **OK**. With the file open, click the **Fields** tab. A list of all fields defined in the file will be displayed.

Select the field you want to include on your report. The **Custom Properties** section will update to display the options available for that field. There are three options in the Custom Properties window that affect the Conflict of Interest and Contact searches.

vlain Field Index	Utility		
Main     Field     Index       Field IDs     Image: Im	Field Type:     Contact     Protected       Field Name:     Contact Name       Help Text:	estrict Changes eplicate	

Figure 12, File Maintenance Menu

Include in Conflict Search

The **Include in Conflict Search** option determines whether a field should be included in conflict of interest searching.

Include on Conflict ReportThe Include on Conflict Report option determines<br/>whether a field will appear on the Conflict of<br/>Interest Report generated after running a Conflict<br/>of Interest Search. This field appears for<br/>informational purposes only. In the example below,<br/>the Primary Timekeeper appears on the report<br/>despite not matching the search value.Include in Contact SearchThe Include in Contact Search option determines

The **Include in Contact Search** option determines whether a field should be included in contact searching.

	onflict of Interest Report Insen, Martin & Anderson, P.C.	Page: 1
Partial word search for: JAMES or TATIKI		
Knight/Elizabeth M. Attorney Contact Category: Attorney	Contact	Modified: 08/19/2024
Secondary Contact Name: James/Thor	nas	
415.00 MegaConstruction Corporation Corporate Merger - Megabuilders and Bu <i>Contact Name</i> : <b>Tatiki</b> , Sr./ <b>James</b> R.	Client ilderCorp	Modified: 07/21/2024 Primary: 3 RPA
MegaConstruction Corporation Client Contact Category: Client <i>Contact Name</i> : <b>Tatiki</b> , Sr./ <b>James</b> R.	Contact	Modified: 08/07/2024
Tatiki, Sr./James R. Client Contact Contact Category: Client Contact <i>Full Name</i> : <b>James</b> R. <b>Tatiki</b> , Sr. <i>First Name</i> : <b>James</b> R. <i>Last Name</i> : <b>Tatiki</b> , Sr.	Contact	Modified: 06/01/2024
James/Thomas Attorney Contact Category: Attorney <i>Full Name</i> : Thomas <b>James</b> <i>Email Address 1</i> : t <b>james</b> @gljslaw.com <i>Last Name</i> : <b>James</b>	Contact	Modified: 11/22/2023
JAMES or TATIKI found in 5 records		

Figure 13, Conflict of Interest Report with Primary Timekeeper included

### **Document Search**

Menu:	Search   Document Search				
Home:	All Actions   Search   Document Search				
Quick Launch:	Document Search				

Document Search is used to search linked documents and email attachments attached to PracticeMaster records.

Document searching is easy. Simply enter the word or words you want to search for and click the **Search** button. When the search has completed, select a printer from the list and click **Print** or **Preview**.

🕲 Document Search	
Search for: FEE AGREEMENT	Search
In Files/Documents Named: *.DOCX, *.DOC	Cancel
Date Range	
	x mm/dd/yyyy v To: mm/dd/yyyy v
Clients to Search	Phrase Match
All Clients	O Must match at least one word
O Specific Clients Select Clients	Must match all words
	Search Options
Document Management Types to Search	Phonetic Search (Sounds like)
All Document Types	Stemming (Grammatically similar phrase)
O Specific Document Types Select Types	Fuzzy Search (Common misspellings)
	Fuzziness Level (1-5) 5
Document Management Users to Search	Files to Search
All Users	Document Management Documents
○ Specific Users	Search all document versions
Created By V Select Users	Email Attachments
	Linked Documents

Figure 14, Document Search window

If your search returns more results than expected, you can use the options of the Document Search window to further refine your search. The **In Files/Documents Named** field allows you to enter specific file names or extensions to be searched. The "?" character can be used as a single-character wildcard, whereas the "\*" character acts as a multi-character wildcard. In the example above, the wildcard character is used to search all file names and file extensions of .doc or .docx.

You can also narrow down your search by selecting a **Date Range**, **Clients to Search**, **Document Management Types to Search**, or **Document Management Users to Search**.

Both the Email Attachments and Linked Documents indexes must be enabled in order to perform Document Searches. For more information on enabling indexes, see page 24.

### **Document Search Report**

When the Document Search has completed, you will be prompted to print a Document Search Report. Figure 15 shows a Document Search Report for the Document Search shown in Figure 14.

Date: 08/26/2024	<b>Document Search Report</b> Jensen, Martin & Anderson, P.C.	Page: 1
Whole word search for: FEE ne	ar AGREEMENT	
100.00 Larson/Michael	Document Management	Modified: 08/19/2024
Larson v. Bel-Cor		Primary: 1 MLJ
Document Name:		
FEE-Fee Agreement.doc		
-100.00 - Larson v. Bel-Cor I	EE AGREEMENT This document is a retainer agreement	t between the law firm of
-In the event that this agree	ment is terminated for any reason by the Client, the fee	paid shall be deemed as
	Calendar	
Larson v. Bel-Cor	Calendar n_Michael\100\00\FEE-Fee Agreement.doc	
Larson v. Bel-Cor		
Larson v. Bel-Cor Document1: Assembled\Larso Document1: FEE-Fee Agreement.doc	n_Michael\100\00\FEE-Fee Agreement.doc	Primary: 1 ML
Larson v. Bel-Cor Document1: Assembled\Larso Document1: FEE-Fee Agreement.doc	n_Michael\100\00\FEE-Fee Agreement.doc	Primary: 1 ML
Document1: FEE-Fee Agreement.doc -100.00 - Larson v. Bel-Cor I	n_Michael\100\00\FEE-Fee Agreement.doc	Primary: 1 ML
Larson v. Bel-Cor Document1: Assembled\Larso Document1: FEE-Fee Agreement.doc -100.00 - Larson v. Bel-Cor I	n_Michael\100\00\FEE-Fee Agreement.doc	Primary: 1 ML
Larson v. Bel-Cor Document1: Assembled\Larso Document1: FEE-Fee Agreement.doc -100.00 - Larson v. Bel-Cor I	n_Michael\100\00\FEE-Fee Agreement.doc	Primary: 1 ML
Larson v. Bel-Cor Document1: Assembled\Larso Document1: FEE-Fee Agreement.doc -100.00 - Larson v. Bel-Cor I	n_Michael\100\00\FEE-Fee Agreement.doc FEE AGREEMENT This document is a retainer agreement rment is terminated for any reason by the Client, the fee	

Figure 15, Document Search Report

### **Configuring Fields for Document Searching**

File fields added in PracticeMaster can be configured to include or exclude their linked documents from Document Searches via File Maintenance.

#### ► To change the Document Search status of a File field

- 1. In the Quick Launch, search for and select "File Maintenance." Proceed with the backup when prompted.
- 2. In the File Maintenance window, double-click the file containing the field you want to manage.
- 3. In the File Definition window, click the **Field** tab.
- 4. Select the field you want to edit from the list of Field IDs.
  - Select the **Include in Document Search** check box to include linked documents in this field in Document Searches.
  - Clear the **Include in Document Search** check box to exclude linked documents in this field from Document Searches.

**Note:** You will be prompted to rebuild the Linked Documents search index after changing this setting.

- 5. Repeat step 4 for each field in this file that you want to change. When you are finished click **Done** and then click **Yes** to confirm your changes.
- 6. Repeat steps 2-5 for fields in any other files that you want to change.
- 7. When you are finished, close the File Maintenance window.
- 8. Rebuild the Linked Documents search index to add or remove the linked documents from the Document Search. See the Search Settings section on page 24 for information on rebuilding search indexes.

## Find and Replace

The Find and Replace window can be used to find one or more records containing specific text, and optionally replace the text with a new value. Find and Replace is a quick and easy alternative to updating multiple records with the same information one by one.

Find and Replace is available in all PracticeMaster files. Once the file is open, you can access the Find and Replace window by pressing Ctrl + F or by selecting **Find and Replace** from the **Take Action** menu of the **Quick Clicks** pane.

Using the Find and Replace window is simple. Enter the text you want to find in the **Search For** field. If you want to replace it with new text, enter the new text in the **Replace With** field. In the example below, the text "McDonald" is being replaced with "MacDonald":

厦 Find and Repla	ce					_		×
Search For:	Williams				 ~	·	Find	d
Replace With:	Willim				~	·		
Search Record	5						<u>R</u> epla	ace
Ourrent List	(Filtered)	OHigh	lighted	Records			Re <u>p</u> lac	e All
Search Fields O All Fields		● Spec	ific Fiel	lds	Select Fields			
Search Options				Replace Optio				
Find whole				Only repla Replace er	ield contents		Go to R	ecord
	,			- ,			201010	00010

Figure 16, Find and Replace window

Once you have entered your search value, click the **Find** button. A list of all values that match your search will be displayed in the Search Results portion of the window.

Find and Repla	ace				-		>	
Search For:	Williams			~	ſ	Find	1	
Replace With:	Willim			~				
Search Record	1-					<u>R</u> epla	ce	
Current List	(Filtered)	/ Highlighted P	lecorus			Replace	2 All	
Search Fields								
○ All Fields		Specific Field	-	Select Fields				
		specific Field	5	Select Fields				
Count Oution	_		Dealers Ontings					
		Search Options Replace Options						
Match Case     Only replace matching text								
Match Case	e	(	Only replace ma	atching text				
Find whole	-	(	Only replace mails of the other sectors in the other sectors and the other sectors of the other sectors in the other sectors and the other sectors are sectors and the other sectors are sectors and the other sectors are	-	2	<u>G</u> o to Re	cor	
_	word only	(		-		<u>G</u> o to Re	cor	
Find whole	word only	(	O Replace entire f	field contents	-	<u>G</u> o to Re		
Find whole Search Results	word only Time Start	( Calendar Cod	O Replace entire f	field contents Occurrence		_	cor	
Find whole Search Results Due Date 08/19/2024	word only Time Start	( Calendar Cod	Replace entire f	field contents Occurrenceyment to Mr. <u>Wi</u>	lliams.			
Find whole Search Results <b>Due Date</b> 08/19/2024 07/26/2024	word only Time Start hh:mm:ss AM 11:30:00 AM	( Calendar Cod	Replace entire f	field contents Occurrence yment to Mr. <u>Wi</u>	lliams.			
Find whole Search Results <b>Due Date</b> 08/19/2024 07/26/2024	word only Time Start	( Calendar Cod	Replace entire f	field contents Occurrenceyment to Mr. <u>Wi</u>	lliams.			
Find whole Search Results <b>Due Date</b> 08/19/2024 07/26/2024 07/26/2024	word only Time Start hh:mm:ss AM 11:30:00 AM	Calendar Cod Cl OutCW	Replace entire f     Field Name     Description     Description     Client Name	field contents Occurrence yment to Mr. <u>Wi</u>	lliams.			

Figure 17, Find and Replace results

When the search is completed, you can load any record from the list by highlighting the record you want to load and clicking **Go to Record**. If you have entered text in the **Replace With** field, you can use the **Replace** or **Replace All** buttons to update the selected record or all records respectively. A progress bar will be displayed.

Find and Replace Progress	?	×
This process finds and replaces occurrences of the spe	cified te	ext.
	1(	00%
Replace completed, 13 of 13 replacements made.		
Print Log <	< Detai	ls
User: MLJ		^
Time: 09:57:00 AM		
File: CMSYSTEM\CMCAL		
Replacing Entire Field: No		
Replacing Williams with Willim		
Replace completed, 13 of 13 replacements made.		
Replaced Field: Description for Record Number: 101		
Conditional normant to Mr. Williams	>	¥

Figure 18, Find and Replace Window

The **Details** button will expand the progress menu to see these items without printing. The progress window will inform you of any changes that were or were not successfully implemented. Clicking the **Print Log** button will print a list of modifications.

You can also use the various options to further refine your search. The Search Records section lets you toggle between searching the currently selected filtered list and one or more **Highlighted Records**. The Search Fields section is used to designate which field or fields should be searched for the value in the **Search For** field. If you want to limit the find to match specific cases or full words, the Search Options section includes options to **Match Case** and **Find whole word only**. If using the Replace function, the Replace Options section allows you to choose whether you want to **Only replace matching text** or **Replace entire field contents**.

**Note:** You can also use Find and Replace to find and populate blank fields by leaving the **Find** field blank.

### **Training Videos**

You can view the following training video for more information. Clicking the link will open the training video in your browser. All training videos are also accessible in the Quick Launch by searching for and selecting "Training Videos," and at <u>Tabs3.com/video</u>.



## Search Settings

Menu:	Search   Search Settings
Home:	All Actions   Search   Search Settings
Quick Launch:	Search Settings

PracticeMaster's Conflict of Interest Search, Contact Search, and Document Search windows are configured via the Search Settings window. The window is divided into four tabs: **Index Properties**, **Rebuild Index**, **Exclude List**, and **Rebuild Schedule**.

### **Index Properties**

PracticeMaster stores the information being searched during a Contact, Conflict of Interest, or Document Search in "index" files. The **Index Properties** tab of the Search Settings window is used to configure how often the information contained in these indexes is updated.

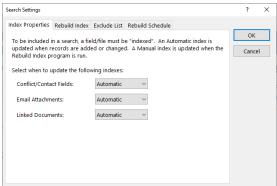


Figure 19, Index Properties tab

To the right of each index is a drop-down menu allowing you to select when the indexes should be updated. The available settings are **Automatic**, **Manual**, and **Disabled**. We recommend setting indexes to **Automatic** to ensure that the index files are kept up to date.

### **Rebuild Index**

The **Rebuild Index** tab is used to update index information for the

Conflict/Contact, Email Attachments, and Linked Documents indexes. The process of rebuilding is the same regardless of the settings on the **Index Properties** tab.

Index Properties	Rebuild Index	Exclude List	Rebuild Sche	dule		
	ves deleted rec	ords from the	indexes. Sele	comatic indexes, a ct the indexes yo tton.	OK Cancel	
			Last Rebuild			
Conflict/Cor	ntact Index		09/23/2023	09:22 AM		
Email Attach	nments Index		09/25/2023	09:24 PM		
Remove	Deleted Recor	ds	09/24/2023	06:22 AM		
Linked Docu	uments Index		09/25/2023	09:24 PM		
Remove	Deleted Recor	ds	09/24/2023	06:22 AM		
		Rebuild N		on the speed of		

Figure 20, **Rebuild Index** tab

Rebuilding an index is simple. Select the corresponding check boxes for the indexes you want to rebuild or refresh. When selecting the Linked Documents or Email Attachments indexes, you will also have an option to **Remove Deleted Records**. Choosing to remove deleted records will perform a full rebuild of the index, which may take longer but results in more efficient searches. Choosing not to remove deleted records performs a quicker refresh of the index. Once you have selected these options, begin the rebuild by clicking the **Rebuild Now** button.

### **Exclude List**

The Exclude List is used to specify words that should not be included when running the Conflict of Interest Search, Contact Search, or Document Search. This reduces the size of the index files, resulting in faster search times when searching a significant amount of data. PracticeMaster includes a list of commonly excluded words.

Search Settings	? ×
Index Properties Rebuild Index Exclude List Rebuild Schedule	
The following is a list of words that will be excluded from all searches.	ОК
AGREES ALL ALL ALL ALL ALL ALL ALL ALL ALL AL	Cancel
AND AND ANOTHER ANY ANY ANY	
Add Word Delete Word	

Figure 21, **Exclude List** tab

To add a word to the Exclude List, click the **Add Word** button. An empty text box will be added to the list of words. Type in the word you want excluded and press Enter. The word will be added to the list in alphabetical order.

To remove a word from the list, highlight the word and click the **Delete Word** button.

### **Rebuild Schedule**

Scheduling a rebuild or refresh of the search indexes is a Platinum-exclusive feature. This allows the search indexes to be rebuilt as a one-time or recurring event, regardless of whether users are currently in any Tabs3 Software.

rch Settings						?	
dex Properties	Rebuild Index	Exclude List	Rebuild Sch	edule			
ono-timo or r	curring coarch	index rebuild	can be scho	duled in advance by		ОК	
dding a rebuild		index rebuild	can be series	duled in advance by		Cancel	
Rebuild Type		Next Rur	n Time	Last Run Time	^		
Attachments, D	locs	09/26/20	24 09:00 pm	09/25/2024 09:00 p	m		
Attachments, D	locs	09/25/20	24 06:00 am	09/24/2024 06:00 a	m		
Conflict		09/30/20	24 09:00 am	09/23/2024 09:00 a	im		
					~		
Add Rebuild	Task F	dit Re	move				

Figure 22, Rebuild Schedule tab

#### To add a scheduled rebuild or refresh

- 1. Click the **Add Rebuild Task** button.
- 2. Select which indexes to rebuild or refresh.
- 3. Select the date and time to start the rebuild or refresh.
- 4. Select how often the rebuild or refresh will be performed.
- 5. Click Save.

Schedule Search Index Rebuild		?	×
Rebuild Type  Conflict/Contact Index  Email Attachments Index  Remove Deleted Records  Iniked Documents Index Remove Deleted Records			
Schedule When do you want the rebuild to start? Start Date: 09/01/2024 Start Time: 09:00 PM How often do you want to perform the rebuild? Just Once Every 1 day(s) @ Daily Oweekly O Monthly			
	Save	Cance	2l

Figure 23, Schedule Search Index Rebuild window

When selecting the Linked Documents or Email Attachments indexes, you will also have an option to **Remove Deleted Records**. Choosing to remove deleted records will perform a full rebuild of the index, which may take longer but results in more efficient searches. Choosing not to remove deleted records performs a quicker refresh of the index.

**More Info:** Information about scheduling a rebuild or refresh of the search indexes, and configuring notifications for search index rebuilds, can be found in the *Platinum Setup Guide*.

### Resources

Additional information on the features included in this guide is available via PracticeMaster's built-in help files, PracticeMaster Training Videos, and the Tabs3 Software Knowledge Base.

#### Help

Help is installed with the software and is easily accessed by pressing F1, by clicking the button, or in the Quick Launch by searching for and selecting "Help Topics." Help includes detailed information regarding specific applications and features. Clicking the opens the relevant Help topic for the window you are currently using. Many times, reading the appropriate Help topic may be the fastest way to find your answer.

### **Knowledge Base**

Tabs3 Software publishes an extensive Knowledge Base on the Internet with advanced information. It contains information on Error Troubleshooting, Networking & Windows Issues, "How To" articles, and product-related articles. You can access the Knowledge Base in the Quick Launch by searching for and selecting "Knowledge Base," or from your web browser at

support.Tabs3.com.

### **Training Videos**

You can view the following training videos for more information. Clicking a link will open the associated training video in your browser. All training videos are also accessible in the Quick Launch by searching for and selecting "Training Videos," and at Tabs3.com/video.

Conflict of Interest Search

Using Quick Clicks

### Tabs3 Support

Tabs3 Software provides some of the best support in the industry. Service to our customers is extremely important to us—so much so that our motto is:

#### Reliable software. Trusted service.

Support is provided at no charge with a maintenance plan and is available from 8:00 a.m. to 5:00 p.m. Central Time, Monday through Friday. If you have any questions, please feel free to call our Support staff at (402) 419-2210.

Email support is also available for all firms on maintenance. Our support team responds to emails during office hours. Our goal is to respond to your question within one business day. Please keep in mind that time-sensitive and complex issues are better handled over the phone. To request email support, visit **Tabs3.com/support**.

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