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# PracticeMaster Search Guide

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PracticeMaster

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**PracticeMaster Search Guide**



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Version 2024 (Tuesday, July 16, 2024)

# Table of Contents

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

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.

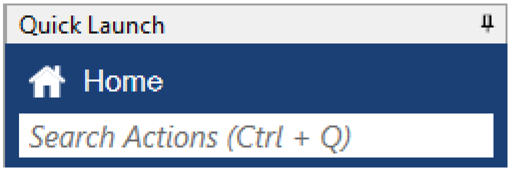


*Figure 1, Search Actions*

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.

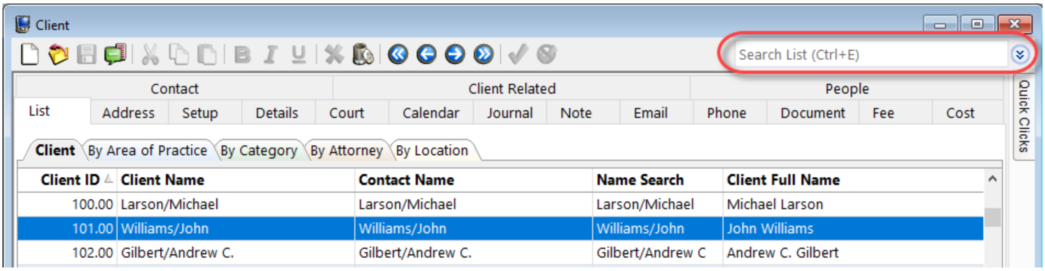


*Figure 2, Search Box on **List** tab of Client file*

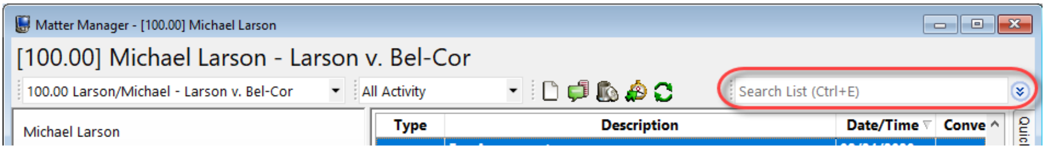


*Figure 3, Search Box in Matter Manager*

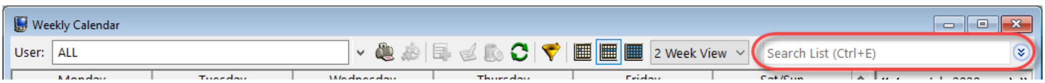


*Figure 4, Search Box in Weekly Calendar*

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 

indicator indicates that PracticeMaster is waiting for the user to finish entering characters into the Search box. Finally, the green 

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.

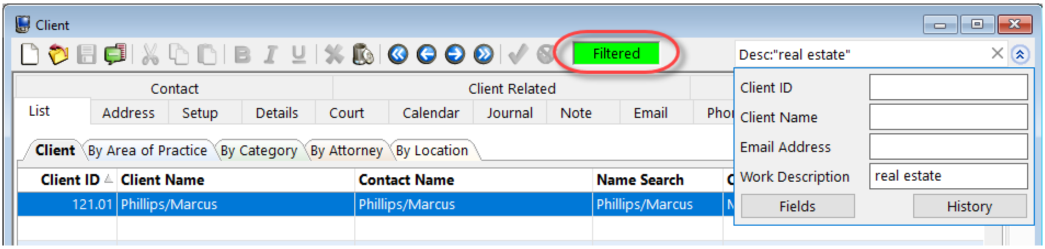


*Figure 5, Search Box with Filtered indicator and Search pane*

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:

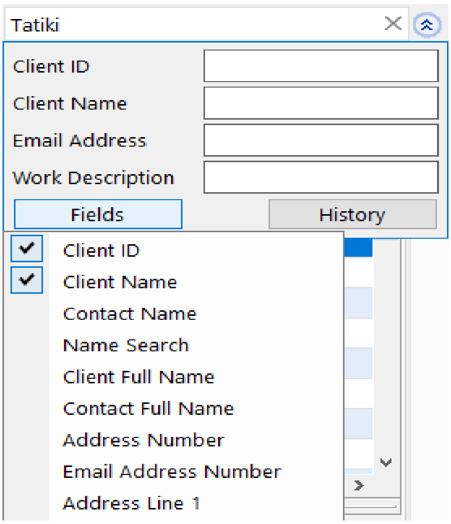


*Figure 6, Search Panel with column layout fields*

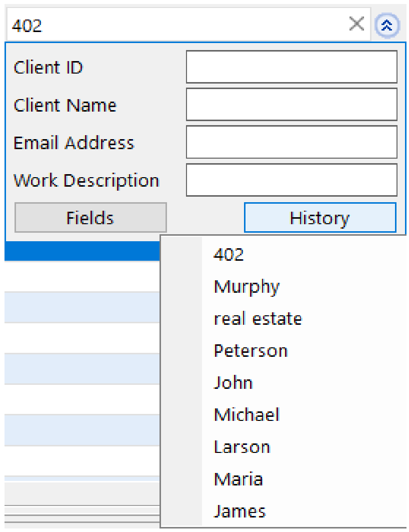


*Figure 7, Search Panel with History*

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 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."

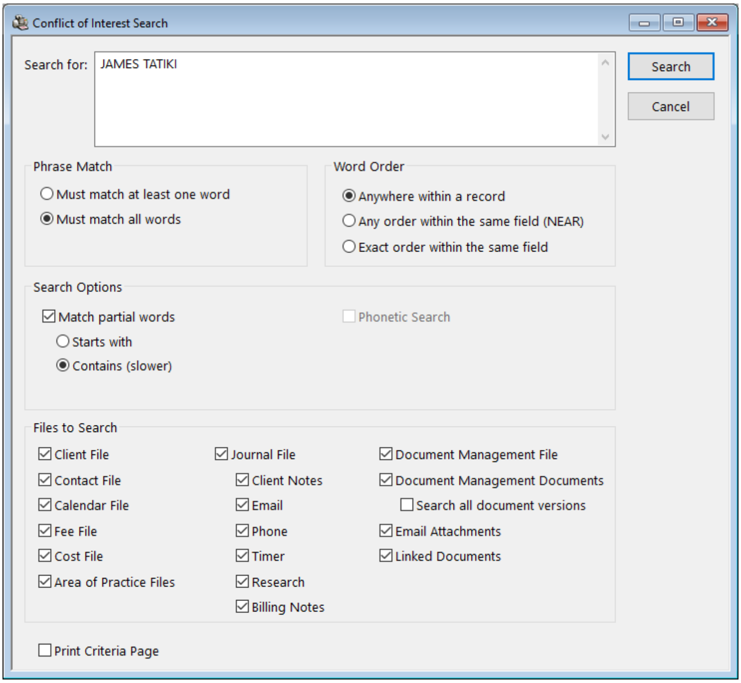


*Figure 8, Conflict of Interest Search*

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.

Date: 08/26/2024 | **Conflict of Interest Report** | Page: 1

Jensen, Martin & Anderson, P.C.

Partial word search for: **JAMES** or **TATIKI**

---

Knight/Elizabeth M. — Contact — Modified: 08/19/2024
Attorney
Contact Category: Attorney
*Secondary Contact Name*: **James**/Thomas

---

415.00 MegaConstruction Corporation — Client — Modified: 07/21/2024
Corporate Merger - Megabuilders and BuilderCorp — Primary: 3 RPA
*Contact Name*: **Tatiki**, Sr./**James** R.

---

MegaConstruction Corporation — Contact — Modified: 08/07/2024
Client
Contact Category: Client
*Contact Name*: **Tatiki**, Sr./**James** R.

---

Tatiki, Sr./James R. — Contact — Modified: 06/01/2024
Client Contact
Contact Category: Client Contact
*Full Name*: **James** R. **Tatiki**, Sr.
*First Name*: **James** R.
*Last Name*: **Tatiki**, Sr.

---

James/Thomas — Contact — Modified: 11/22/2023
Attorney
Contact Category: Attorney
*Full Name*: Thomas **James**
*Email Address 1*: t**james**@gljslaw.com
*Last Name*: **James**

---

**JAMES** or **TATIKI** found in 5 records

*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 **Tabs3.com/video**.

**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."

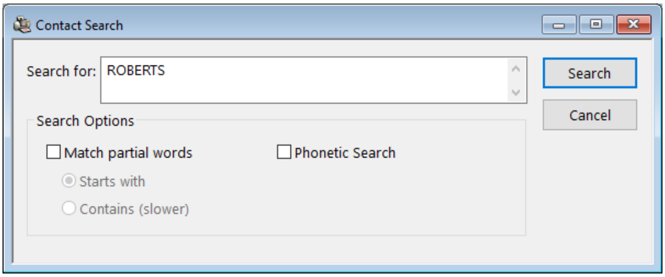


*Figure 10, Contact Search*

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** Page: 1
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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. **Roberts**, MD

**ROBERTS** found in 4 records

*Figure 11, Contact Search Report*

# 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.

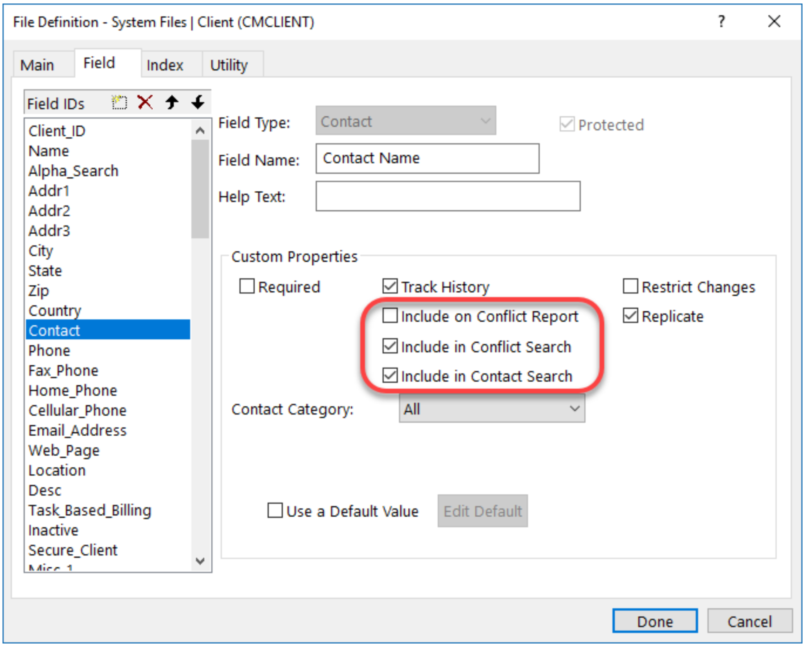


*Figure 12, File Maintenance Menu*

**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 Report**

The **Include on Conflict Report** option determines whether a field will appear on the Conflict of Interest Report generated after running a Conflict of Interest Search. This field appears for informational purposes only. In the example below, the Primary Timekeeper appears on the report despite not matching the search value.

**Include in Contact Search**

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

Date: 08/26/2024

**Conflict of Interest Report**
Jensen, Martin & Anderson, P.C.

Page: 1

Partial word search for: **JAMES** or **TATIKI**

| | | |
|---|---|---|
| Knight/Elizabeth M.<br>Attorney<br>Contact Category: Attorney<br>*Secondary Contact Name*: **James**/Thomas | Contact | Modified: 08/19/2024 |
| 415.00 MegaConstruction Corporation<br>Corporate Merger - Megabuilders and BuilderCorp<br>*Contact Name*: **Tatiki**, Sr./**James** R. | Client | Modified: 07/21/2024<br>Primary: 3 RPA |
| MegaConstruction Corporation<br>Client<br>Contact Category: Client<br>*Contact Name*: **Tatiki**, Sr./**James** R. | Contact | Modified: 08/07/2024 |
| Tatiki, Sr./James R.<br>Client Contact<br>Contact Category: Client Contact<br>*Full Name*: **James** R. **Tatiki**, Sr.<br>*First Name*: **James** R.<br>*Last Name*: **Tatiki**, Sr. | Contact | Modified: 06/01/2024 |
| James/Thomas<br>Attorney<br>Contact Category: Attorney<br>*Full Name*: Thomas **James**<br>*Email Address 1*: t**james**@gljslaw.com<br>*Last Name*: **James** | 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**.

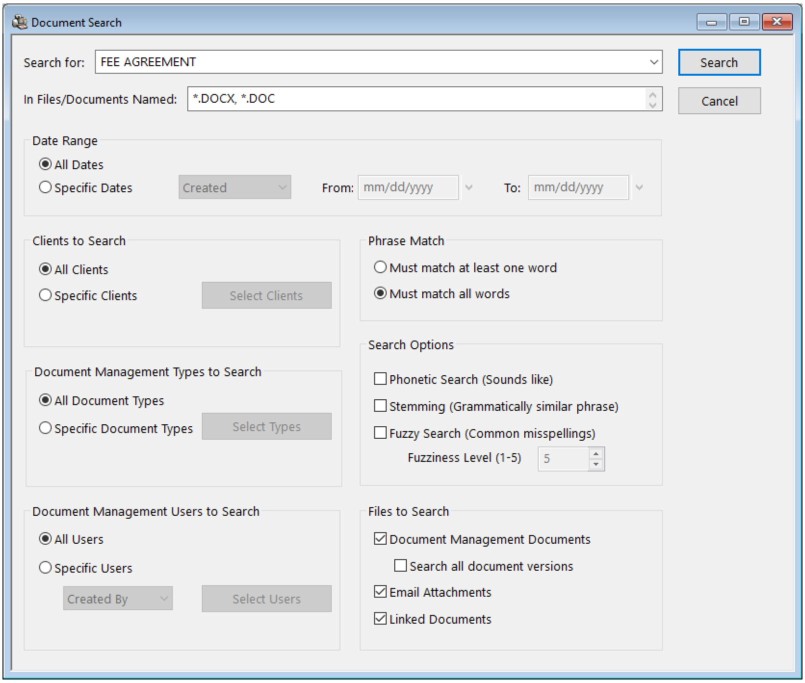


*Figure 14, Document Search window*

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 **Document Search Report** Page: 1
Jensen, Martin & Anderson, P.C.

Whole word search for: **FEE** near **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 **FEE AGREEMENT** This document is a retainer **agreement** between the law firm of
-In the event that this **agreement** is terminated for any reason by the Client, the **fee** paid shall be deemed as

100.00 Larson/Michael Calendar Modified: 11/22/2023
Larson v. Bel-Cor Primary: 1 MLJ
Document1: Assembled\Larson_Michael\100\00\FEE-Fee Agreement.doc
*Document1*:
FEE-Fee Agreement.doc
-100.00 - Larson v. Bel-Cor **FEE AGREEMENT** This document is a retainer **agreement** between the law firm of
-In the event that this **agreement** is terminated for any reason by the Client, the **fee** paid shall be deemed as

**FEE** near **AGREEMENT** found in 2 records

*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":

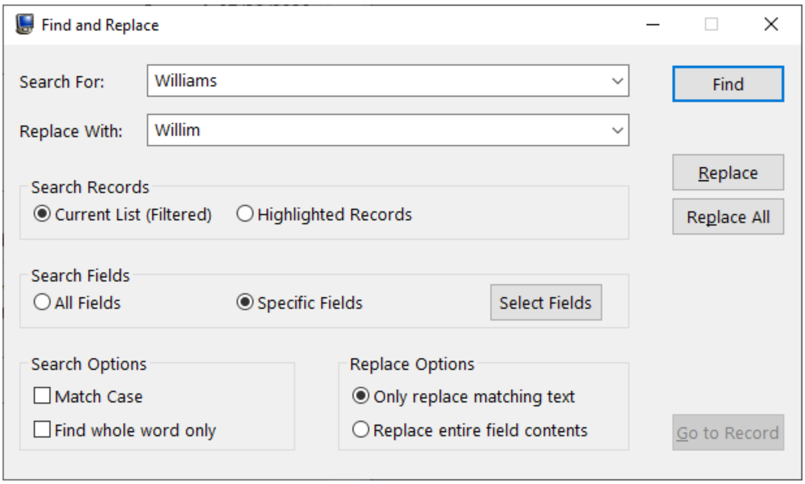


*Figure 16, Find and Replace window*

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.

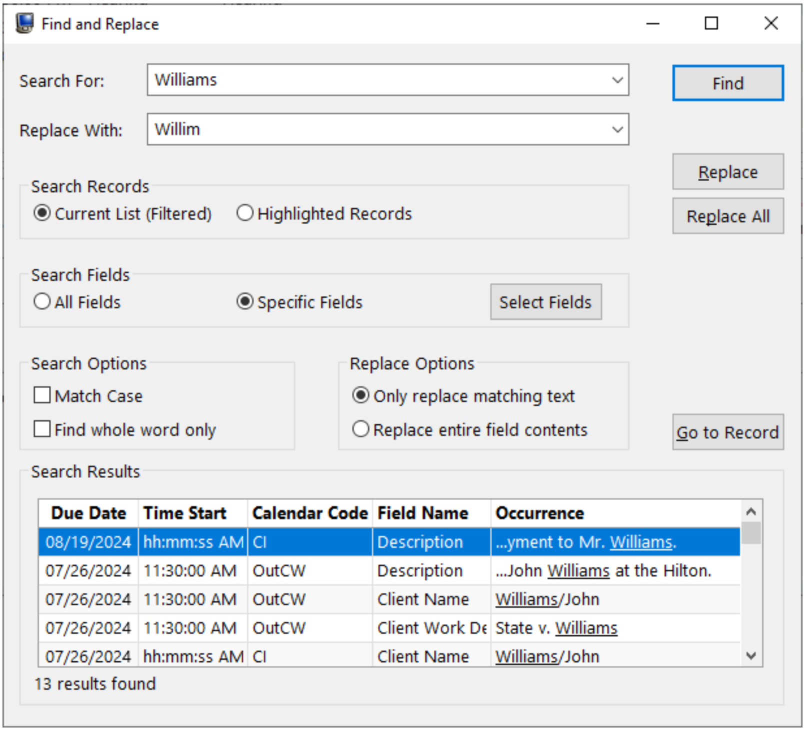


*Figure 17, Find and Replace results*

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.

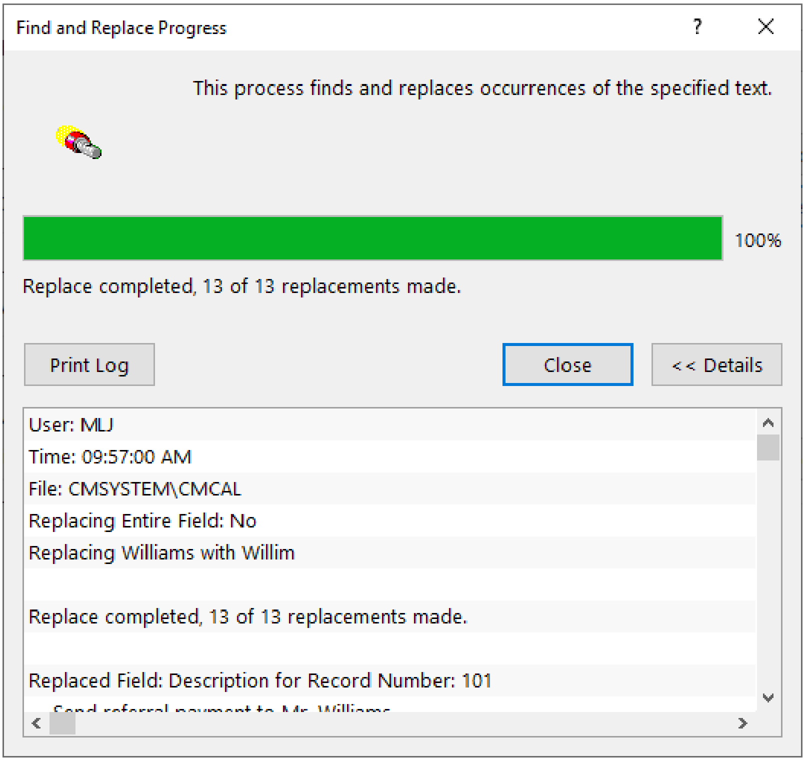


*Figure 18, Find and Replace Window*

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 **Tabs3.com/video**.

**Using Quick Clicks**

# 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.

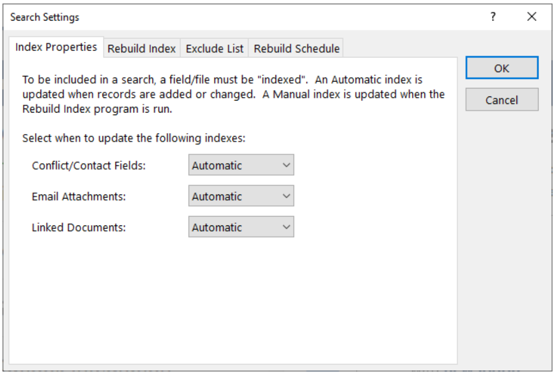


*Figure 19, **Index Properties** tab*

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.

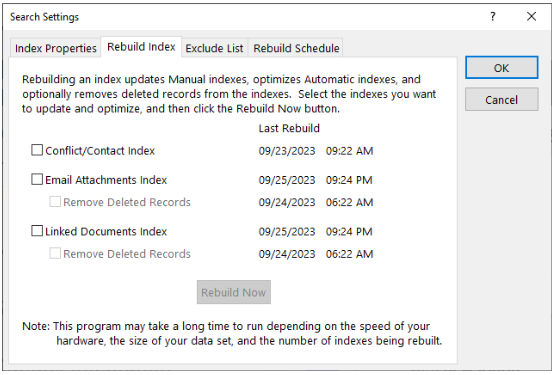


*Figure 20, **Rebuild Index** tab*

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.

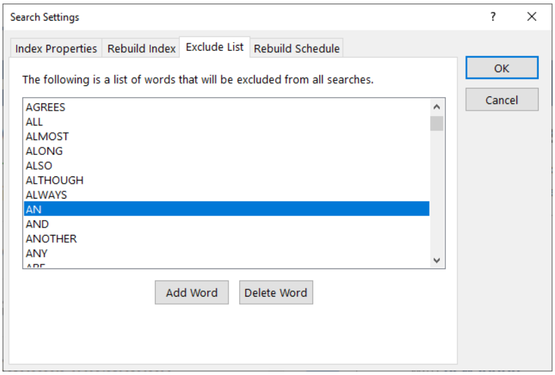


*Figure 21, **Exclude List** tab*

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.

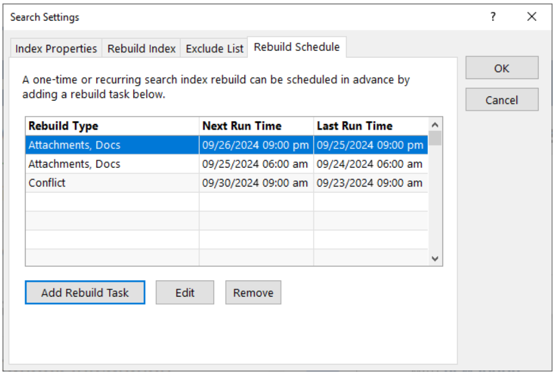


*Figure 22, **Rebuild Schedule** tab*

## ▸ 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**.

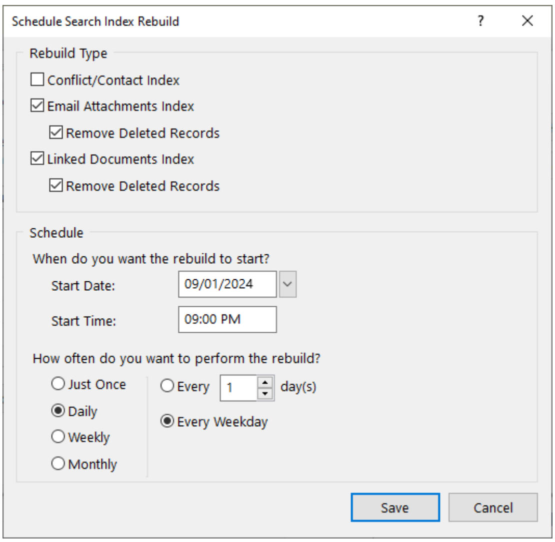


*Figure 23, Schedule Search Index Rebuild window*

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 button 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**.

# Index

## R



## S



## T



## V



## W