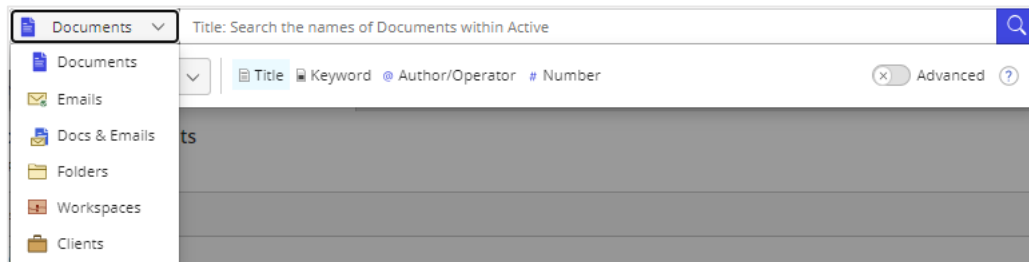


# Simple Search

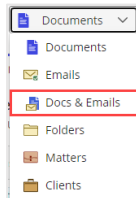
## Simple Search

Simple Search allows you to find your content easily through a simple yet efficient search experience. You can perform either a simple or advanced search from a single window, setting the search scope upfront, resulting in more narrow and targeted search results. Search results can be further narrowed down by applying filters or adjusting the scope of the search results.



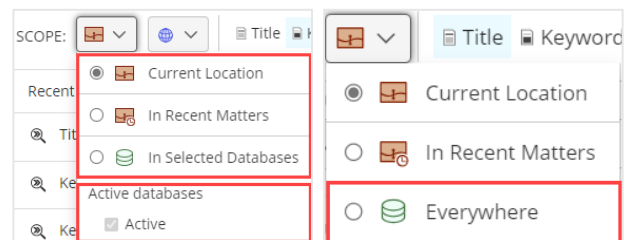
## Perform a Search

1. From the search drop down select the **item** you are looking for eg **Docs & Emails**.

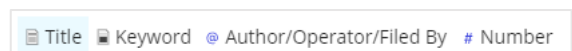


**Tip:** Whilst working in any node eg **Documents**, if you switch the search type eg to **Docs & Emails** as shown above, iManage Work will remember your choice for the selected node.

2. From **SCOPE:** determine where to search. (Options displayed will vary. Searches are container based eg if you are in a Matter workspace when you access search, then **Current Location** will be selected). You can also specify the **Active databases** (libraries) to search across, if only one library is in use **Everywhere** will display.



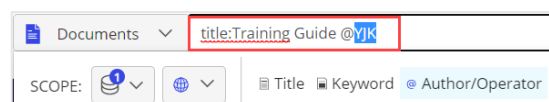
3. Select required **search type**. Types are relevant to the item chosen eg for **Docs & Emails** you can search by **Title, Keyword, Author/Operator/Filed By, # Number**.



- Tip:** You can set **Title** or **Keyword** as the default search value by selecting it in the search box, the default is highlighted in blue. Your selection persists unless changed by you again.
4. Type **search criteria** and press **Ctrl & Enter, Enter** or



**Tip:** Build your search options eg select **Title**, type **search criteria**, select **Author/Operator** select name from list (or press **Spacebar** and type **@**).



5. Your search results will be displayed in **lists**, select a **tab** to switch between these lists and narrow in on matching results. These lists apply to Documents, Emails and Docs & Emails searches.






**In Recent Matters** lists matching items belonging to matters you have accessed in the last 30 days.

**Everywhere / In Selected Databases** lists all matching items belonging to any databases selected in your Search Scope. If you only have access to one database, the list is labelled **Everywhere** instead of **In Selected Databases**.

## FYI

- **Client Search:** Search for clients based on terms within the name. When you click on the **Client**, all **Matters** belonging to the Client are listed.
- **Matter Search:** Choose **Title** to search for matters based on terms within the **Title**. Choose **Keyword** to search for matters based on terms within any metadata field. Choose **Description** to search for matters based on terms within the **Description**, the **Description** can be viewed in the matter's **Properties**. Choose **Owner** to search for matters based on the **Owner**, matching iManage users will populate for quick selection.
- **Title:** Searches within an items **Title**.
- **Subject:** Search for emails based on terms within the **Subject**.
- **Keyword:** Searches anywhere in the document including title, description, content or any metadata used. For an email it will search anywhere in the email, including the email, subject of the email, attachments (if any), and metadata used.
- **From / To:** Search for emails based on the **Sender** or **Recipient**.
- **Author/Operator/Filed By:** Searches based on the **Author**, **Operator** or **Filed By** user, matching iManage users will populate for quick selection.
- **Full-Text vs Exact Match:** To return all possible search results, iManage Work automatically uses Full-Text search to find content that contains each search term, as well as variations, in any order. Perform an Exact Match search to narrow results and retrieve items with set terms. See Search Behaviour Examples for further information.
- **Number:** Find a specific item based on its **Document Number**.
- Type **@** to display a list of **usernames**.
- Type **#** followed by your **Document Number**.

## Optional

- To remove previous search criteria click **X**
- 
- **Recent Searches** displays the last 5 searches, select one to re-run that search
  - To delete a recent search click **X** on the right
  - To delete all recent searches click **Clear Recent Searches**
  - To view search tips click 
  - Click  to set the **Language** of the search
  - To define additional search criteria click the **Advanced** toggle to switch on **Advanced** search
  - Use **Save as Search Folder** to save a search as a search folder

## Search Results Tips

- Narrow the search scope to a **specific folder**, **In Recent Matters** or **database** using the **list tabs**.
- **Apply a Filter:** Search results can be further narrowed down by applying a **Filter**. If performing a **Docs & Emails** search the Filter now shows **Email** under **File Type**.
- Review any applied **Filters**, select **Reset** to remove all Filters.
- Use **Sort** to further organise results.
- Use **Preview** to quickly view an item.
- If you run a **Keyword** search then select the document/email so it is displayed in the **Preview** panel, the **search terms** will be highlighted. If you proceed to view the document/email using the **full-screen preview**, you can use the left pane to navigate between the search results.
- **Search-Irrelevant Conditions:** A document not listed in search results may be due to other circumstances instead of the actual search itself eg: you do not have access to the matching document or the matching document was deleted.
- **Sharing Search Results:** You can export a list of search results as a **.csv file** to share.

## Search Behaviour Examples

SEARCH TERM	TYPE OF SEARCH	SEARCH RESULTS	APPLIES TO
agrees	<b>Full-Text:</b> Search for terms and their variations	<b>Input:</b> agrees <b>Output:</b> agree, agrees, agreed	Documents, Emails, Docs & Emails, Matters, Clients
credit agreement	<b>Full-Text:</b> Search for phrases and their variations	Returns items containing both the terms, irrespective of their location and their stemmed variations <b>Input:</b> credit agreement <b>Output:</b> credit agreement, credit, creditor, agreement, agree, agreements, and agreed	Documents, Emails, Docs & Emails, Matters
"lease agreement"	<b>Exact Match:</b> Enclosing search terms in quotation marks (" ") will search for instances of those exact search terms in the exact order (In <b>Advanced Search</b> use the <b>Contains Exactly</b> search criterion instead of " ")	Returns the terms you typed in, in exactly the order you typed them <b>Input:</b> "lease agreement" <b>Output:</b> Stadum lease agreement	
553*	Number search with wildcards <b>Operator:</b> * (asterisk) Use the wildcard * in place of any unknown characters. Wildcards cannot be the first or second character of your term	Documents containing the search number or alphanumeric term fragment <b>Input:</b> 553* <b>Output:</b> 5539, 553A	Documents, Emails, Docs & Emails, Folders, Matters, Clients
rou*	Search with wildcards <b>Operator:</b> * (asterisk) Use * as a wildcard in place of any number of unknown characters. Wildcards cannot be used as the first or second character	Documents containing words that include the search term and multiple missing characters <b>Input:</b> rou* <b>Output:</b> route and rounded	Documents, Emails, Docs & Emails, Folders, Matters

	<i>(imanager.work use * at the beginning, middle or end of a search term eg *rou*)</i>		
doc?	Search with wildcards <b>Operator:</b> ? (question mark) Use ? as a wildcard in place of a single unknown character. Wildcards cannot be used as the first or second character	Documents containing words that include the search term and the missing character ? in the exact location <b>Input:</b> doc? <b>Output:</b> document, doctor, docket	Documents, Emails, Docs & Emails, Matters

## Alphanumeric String

Search terms such as codes or numbers often represent clients, dates, invoices, and other identifiers. When searching for alphanumeric terms, keep the following search behaviours and practices in mind:

- Character limit is 255 (250 characters for imanager.work).
- Not case sensitive (JT3456 = jt3456).
- If exact number or alphanumeric terms are known, an Exact Match (" ") search is not required (description:553739 returns Invoice #553739).
- If the search term contains only a part of the number or alphanumeric term, wildcards must be used (title:Invoice #553\* returns Invoice #553739).
- Apply Exact Match when searching for dates as keywords to prevent Full-Text search from automatically being applied (Keyword Contains Exactly 10/29/07 returns documents containing 10/29/07, 10 29 07, 10.29.07, or 10-29-07, but not documents with 10, 29, 07 in any order).

## Special Characters

Special characters are ignored and treated as spaces. Surrounding terms are treated as Boolean AND or Full-Text searches. For example a **Document, Title** search for **lease\_agreement** returns documents with both lease and agreement in the Title.

For imanager.work a Boolean OR would be used instead, therefore returning either **lease OR agreement** (for more information click [here](#)).

## Stop Words

To support precise content phrase searches, no stop words are used by design. Stop words are common words that modify the meaning of other words but carry no inherent meaning themselves, such as adverbs, conjunctions, and preposition.

For imanager.work, the search service language-specific stop words files are pre-populated with a default list of stop words. The stop words present in the list are omitted when searching. Entering a search term that contains only stop words does not return results.