


EXHIBIT 1

Part 5

vary, because this dialog can be customized by your system administrator. [Table 4.1](#) provides a list of the many possible fields that may be used to search for documents in your database.

To search for documents according to profile information:

1. If iManage DeskSite is not running, launch iManage DeskSite and log into the WorkSite Middle Tier Server. If you are working from within an application that is integrated with iManage DeskSite, select **Open** from the **File** pulldown menu in your application to display the *iManage Integrated Desktop*.
2. Display the *Search Dialog* window by clicking on the **Search** icon  or by selecting **Search** from the **Search** pulldown menu in iManage DeskSite.
3. Enter search criteria in the fields of profile information displayed in the *Search Dialog* window. When you click on the **Find** button, iManage DeskSite will locate documents whose profile records match the information entered in the *Search Dialog* window.

Note: If Lookup buttons are available in your *Search Dialog* window, these are an easy and quick way to enter search criteria into search fields. Click on the Lookup buttons to select valid entries from a lookup table.

Click on **Find** to display the search results in the Document Grid. iManage DeskSite will display up to the maximum number of documents. You can change the maximum number of documents that will be displayed in the Document Grid as the result of a search by selecting **Setup Display Options** from the **Options** menu.

Table 4.1: Fields of Profile Information that may be searchable in your database

Profile Field	Description
Number	The document number is a unique number automatically assigned by iManage DeskSite
Version	Version number of the document (1-999)
Description	Long name of document, up to 254 characters
Name	Short name of document, up to 16 characters

Table 4.1: Fields of Profile Information that may be searchable in your database

Profile Field	Description
Format Type	This field indicates which application should be used to open the document. In most cases, this field is automatically set when the document is added to the database
Author	Author of the document
Operator	The Operator is another user, who like the author, has read/write access to the document, its profile information, and can set document access rights
Class	A classification used to help identify the document
Client	Another custom classification field. This field determines the valid entries for the Matter field
Matter	Another custom classification field used to identify and classify the document. The list of valid entries for this field depends on the entry in the Client field. (In effect, this field can be conceived of as a subclassification)
Custom Fields	Other custom fields may appear in the profile information for documents in your database. These fields may be additional fields used to classify the document, or numeric entry fields, checkboxes, or date entry fields.
Creation Date	Date document was created or installed
Last Edit Date	Most recent date when document was edited
Last EditTime	Most recent time when document was edited
Last User	Name of the user who most recently edited the document.
Size	Size of the document in number of bytes
Retain Days	This is the number of days that the document can remain inactive in the database before iManage DeskSite tags it for archiving.
Index Flag	Indicates whether the document should be indexed by the full text indexer
Comment	Comment associated with the document, up to 8,000 characters, fully searchable

A Sample Profile Search

Profile searches are performed by entering information into the profile fields in the *Document Search* window. Documents are found that have profile fields that match the search information specified. This type of search is sometimes called a query-by-form search. In the example below, an Author name and Document Type are specified. For documents to match the search criteria, BOTH fields of

profile information must match the entries in the *Document Search* window.

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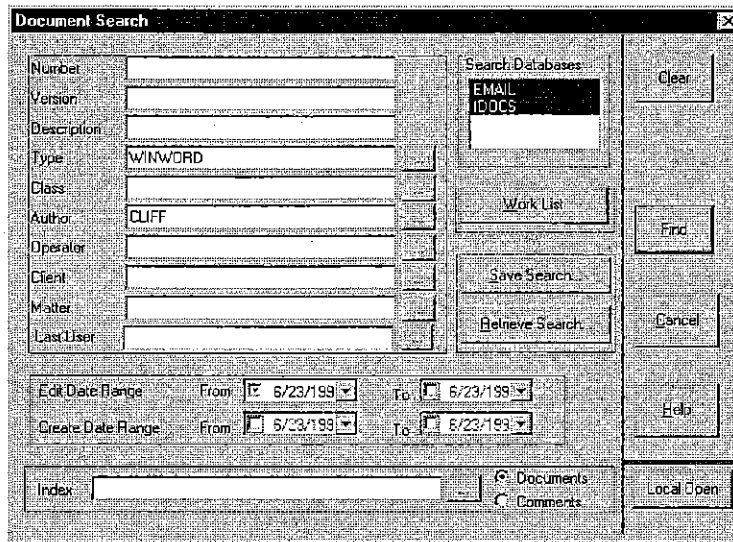


Figure 4.6: Sample *Document Search* window

The documents returned from this search must have CLIFF in their Author field and WINWORD in the Document Type field.

A More Detailed Search

If you find that your search results include too many documents, you need to restrict the scope of your searches further. You can restrict the scope of your search and usually decrease the number of hits by adding more criteria to the search profile. Below is an example of a more detailed profile search. Fields that contain no information always match.

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Figure 4.7: A more detailed search

Notice the differences between the search performed in Figure 4.6 and the search performed in Figure 4.7. In Figure 4.7, three Authors are specified, a Client is Multiple Entries in the Same Field

When you specify multiple valid entries in the same field of profile information, such as in Figure 4.7, where AMARTINEZ, APHILIPS and BOWEN are all specified in the Author field, iManage DeskSite will return documents in the search results that match ANY of these entries. This is different from when you specify entries in multiple fields of profile information. In Figure 4.6, for instance, in which information was specified in the Type and Author fields, iManage DeskSite would only return documents whose profile information matched BOTH of these fields. When you include multiple entries in a single field of profile information, iManage DeskSite will return documents that include at least one of these entries in that field of profile information. Hence, after the search shown in Figure 4.7 is performed, all of the documents found will contain WINWORD6 in the Type field AND MONTAGE in the Client field AND either AMARTINEZ, APHILIPS or BOWEN in the Author field. The documents

returned will also have a Create date after 12/01/98.

Note: When multiple entries are provided in a single search field, use **commas** to separate each entry.

Wildcard Characters

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In addition to being able to select validated entries from selection lookup tables, you can also use wildcard characters to expand and simplify searches. Wildcard characters allow you to match only parts of entries in document profile fields. There are two principal wildcard characters: the **asterisk** and the **question mark**.

- The **asterisk** or **percent sign** stands for any sequence of multiple characters
- The **question mark** stands for any single character

An Example

Let's say that you want to search for all of the documents pertaining to a particular client, called The Montage Company. However, because there are so many documents in the database pertaining to this client, multiple Client classifications were created. Some of these are:

- MONTAGE
- MONTAGE CO
- MONTAGE EST
- MONTAGE MFG

You could enter all of these in the Client field in the *Search Dialog* window to perform a search that would find all of the documents that include any one of these entries in the Client field of profile information. You could also do the same thing by entering



The screenshot shows a search dialog window with a field labeled 'Client' containing the text 'MONTAGE*'. The field is a standard text input box with a small icon on the right side.

in the *Search Dialog* window. **MONTAGE*** or **MONTAGE%** will instruct iManage DeskSite to match any entries that begin with MONTAGE and that are following by any string of characters.

If the library also including documents pertaining to The Montage Company that were classified with the Client classification THE MONTAGE COMPANY, you could include these documents in your search results by adding an asterisk or percent sign to the front of the entry in the Client field, namely:



A screenshot of a search interface showing a text input field. The field is labeled 'Client' on the left and contains the text '*MONTAGE*' in the center. The field has a standard rectangular border and a small icon on the right side.

The Question Mark

The question mark is used to match any single unspecified character. If you wanted to match Client field entries of the type:

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- MONTAGE1
- MONTAGE2
- MONTAGE3
- MONTAGE4

You could use **MONTAGE?** in the Client field in the *Search* window.

Caveat

The danger in using wildcard characters is that you will increase your search results by including undesired matches. For instance, you could match all of the example Client classifications mentioned earlier that pertain to our fictional example, The Montage Company, using this entry in the Client field:



A screenshot of a search interface showing a text input field. The field is labeled 'Client' on the left and contains the text 'MONT*' in the center. The field has a standard rectangular border and a small icon on the right side.

However, this entry would also match such possible Client entries as:

- MONTHLY REPORTS
- MONTGOMERY CO
- MONTSOON FLOWERS CORP

Wildcard Characters in the Description Field

Wildcard characters can be particularly useful in searching the Description field. By default, iManage DeskSite automatically inserts wildcard asterisks as shown. This finds all documents that have the terms WINSOR TRUST in the Description field:

Description	*WINSOR TRUST*
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You can change the default in the *Advanced Options* dialog box explained in Chapter 6. If you did not include the leading asterisk, iManage DeskSite would only find documents whose Description field began with WINSOR TRUST. On the other hand, if you omitted the ending asterisk, iManage DeskSite would only find documents whose Description field ended with the terms WINSOR TRUST.

4 Searching by Document Numbers

One of the most direct ways to locate documents in the database is to search for specific document numbers. If you know the document number for a document, this can be an effective way of locating the document quickly, because every document in the database has a distinct document number and version number.

Numbers can be entered in the Number and Version fields in the *Search Dialog* window either as single numbers or as ranges. The following search would find documents with the numbers 1, 10 to 20, and 100 to 110 (if they exist), and would return only versions 1 to 3 of these documents (if those versions exist).

Search Dialog	
Number	1, 10-20, 100-110
Version	1-3
Description	
Type	
Doc Type	

Figure 4.8: Partial screen shot of the *Search Dialog* window.

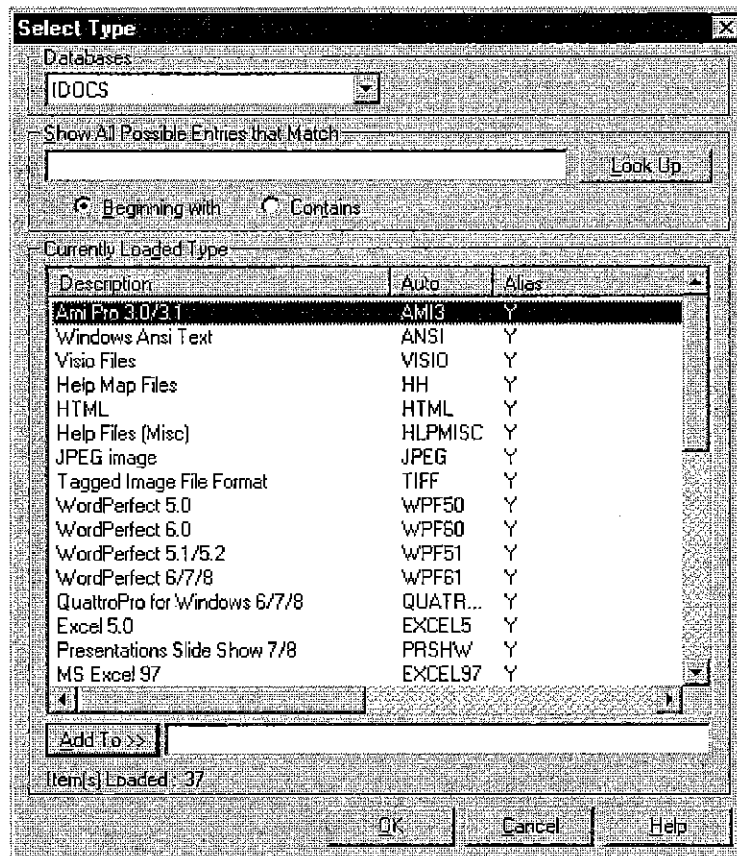
You can also use the less than (<) and greater than (>) symbols to find a range of document numbers.

Using Lookup Dialog Boxes

The fastest and most accurate way to enter search criteria in the *Search Dialog* window is to select entries from Lookup dialog boxes. Lookup dialog boxes list

valid search entries for each field of profile information. If the field of profile information that you would like to use to search the database has a browse button next to it, clicking on the browse button will display a *Selection* dialog box and a list of valid entries from which you can choose.

Below is an example Selection dialog box where you can select or look up values for the Type profile field.



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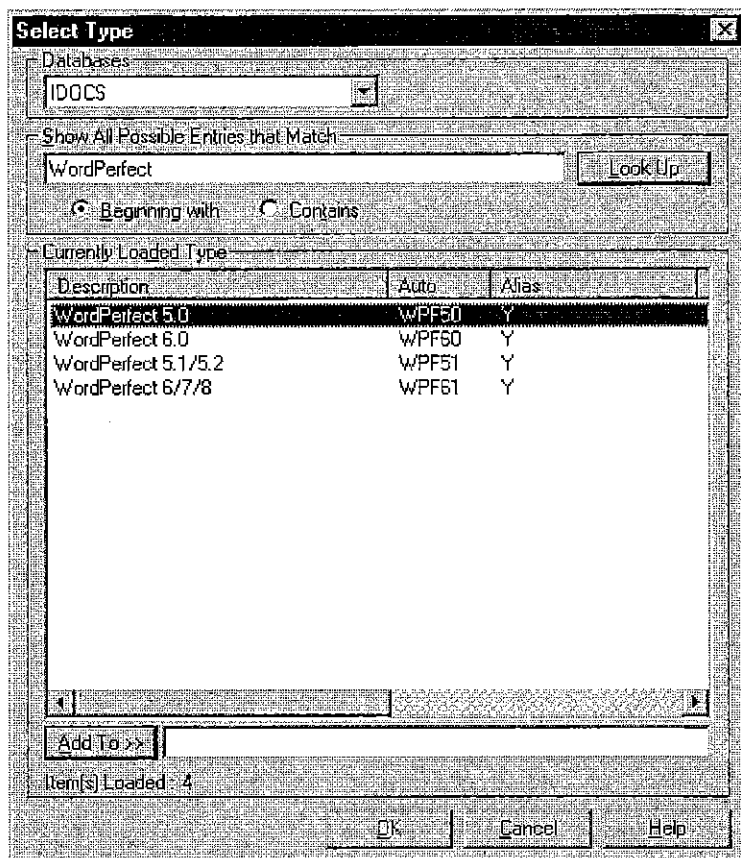
Figure 4.9: Selection dialog box for Type entries in a sample database.

Note: The Lookup dialog boxes only displays up to the first 500 valid entries listed for that field of profile information in the database. If there are more than 500 possible valid entries, use the Find option at the top of the Selection dialog box to locate your entry. When you enter a value in the Find field at the top of the Selection dialog box, iManage DeskSite searches the entire list of valid entries for matches – not just those listed in the Selection dialog box.

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The Lookup Feature in all Selection Dialogs

Use the Lookup feature at the top of all Lookup dialog boxes to locate valid entries in especially long lists. When you enter search criteria in the Lookup field, the table of available options immediately highlights the first match. Click the **Look Up** button and the table displays only those options that match.



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Figure 4.10: Selection dialog box after search was performed for the string "WordPerfect"

Selecting Multiple Entries

Figure 4.10 also shows that you can select multiple entries in the Selection dialog box before clicking the **OK** button. When you click **OK**, all selected entries appear in the appropriate field in the *Search Dialog* window.

Double-clicking an entry in a Selection dialog box selects the entry and returns you to the *Search Dialog* window.

Full Text Searches

Overview

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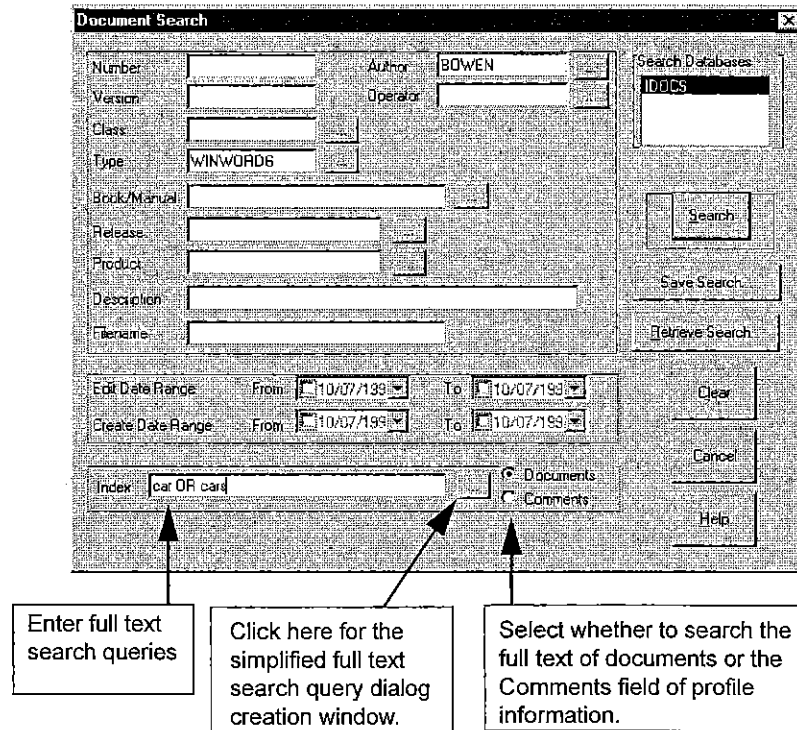
iManage DeskSite's full text searches find documents based on the occurrence of individual words, partial words, and phrases, referred to collectively as *terms*. You can search for occurrences of terms either in the contents of documents or in the text of profile comment fields. You can also perform a search of documents that are within multiple libraries at once.

Full text searches can be performed in conjunction with profile searches. The documents that are found must meet the profile search criteria *and* contain the words or phrases specified by the full text search.

By default, full text searches are not case sensitive.

Entering Full Text Search Criteria

You can enter full text search criteria at the bottom of the *Search Dialog* window. You can also select whether to search through the entire body of the document or the comments field of profile information by clicking the **Documents** or **Comments** radio buttons. In the example below, the user is searching for occurrences of the word "car" or "cars" in the full text of documents that were written by CLIFF and are of the type WINWORD2:



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Figure 4.11: Document Search dialog

Simplified Full Text Searching

A simplified full text search window is available for users who are not familiar with Boolean logic or who do not want to learn how to construct full text search commands. This dialog box enables you to enter key terms or phrases and to construct a simple full text search query automatically.

To access the simplified full text search window:

Click on the browse button next to the Index field, which is used to enter full text search queries. When you click this browse button, the *Find Documents Containing* dialog box appears:

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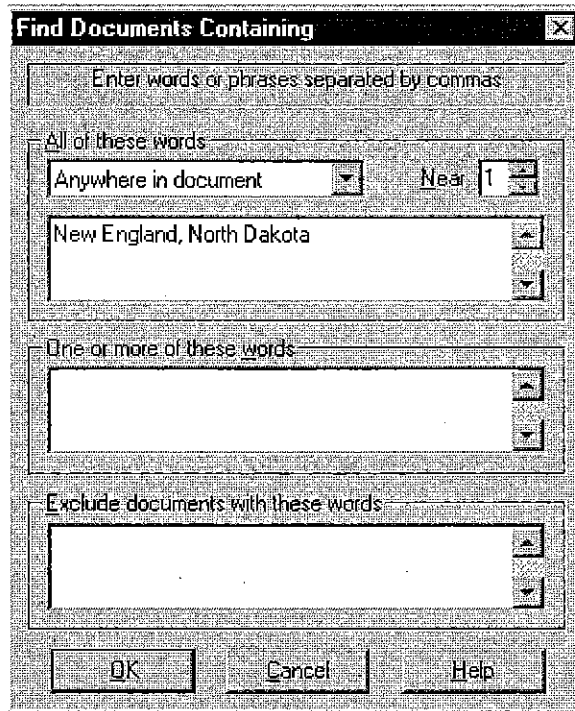


Figure 4.12: Simplified full text search dialog box

Using the Find Document Containing Dialog Box:

You can use the intuitive *Find Documents Containing* dialog box to create simple full text search queries automatically. When the *Find Documents Containing* dialog box appears, enter words or phrases separated by commas into the appropriate fields. In the topmost field, enter a list of terms which must ALL appear in the document in order for it to appear in your search results.

The drop-down list box available above this field lets you set the proximity with which these terms must appear near each other. If you select **Anywhere in document**, then iManage DeskSite will return documents in which these terms appear anywhere in the document, not necessary within any proximity of each other.

If you select **Near each other** from the drop down list box, then the words listed in the topmost field must appear within a defined proximity of each other in a document for that document to be listed in the search results. The **Near** field indicates the proximity within which the words in the topmost field must appear in

the document in numbers of words. If the **Near** field is set to 10 and two words are listed in the **All of these words** field, then these words must both appear in a document and cannot be separated by more than 9 words for iManage DeskSite to list the document in the search results.

In the middle field, enter a list of terms only one of which must appear in the document for it to appear in your list of search results.

In the bottom field, enter terms that should exclude a document from the search results if they appear in that document.

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Examples

The example in [Figure 4.11](#) finds documents that include both the phrase *New England* and the phrase *North Dakota*. It does not return documents that contain the word *New* and the word *England* in separate places – these words must be next to each other and in that order. The same applies to the two terms in the phrase, *North Dakota*.

Error Checking

When you click **OK** in the *Find Documents Containing* dialog box, iManage DeskSite checks the syntax of the terms you have entered and reports any error that you may have entered. If no errors are found, iManage DeskSite constructs a valid search query, which appears in the Index field in the *Search Dialog* window.

Example with Wildcard Characters

You can also enter wildcard characters in the *Find Documents Containing* dialog box. [Figure 4.12](#) shows the use of a wildcard character in the *Find Document Containing* dialog box with terms entered in the middle field.

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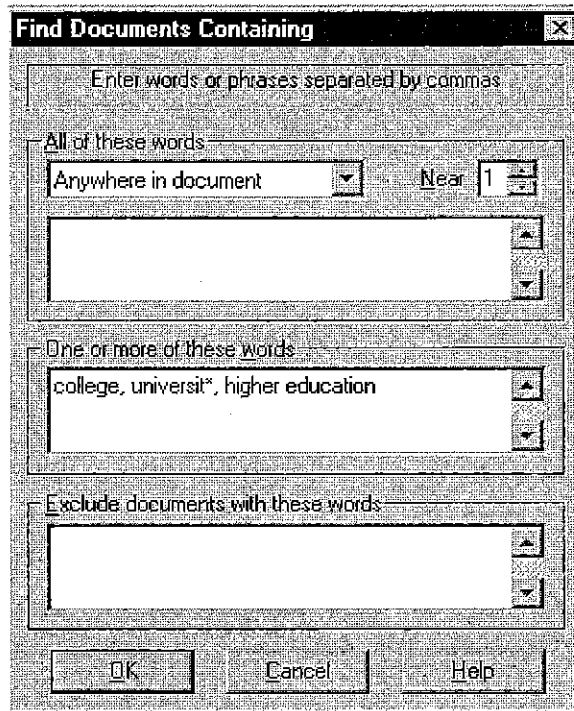
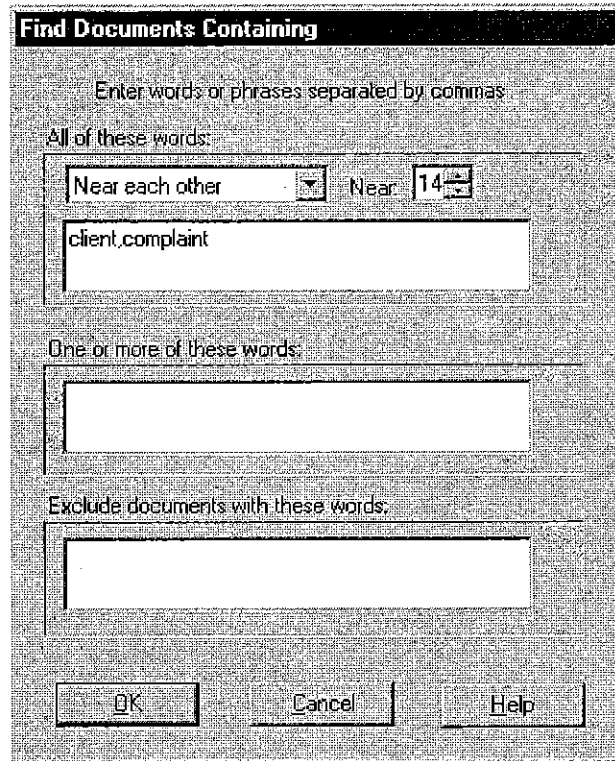


Figure 4.13: Another example of *Find Documents Containing* dialog box

The example search query shown in Figure 4.13 would return documents that included the term *college*, or the phrase *higher education*, or the terms *university* and *universities*.

Proximity Searches

Figure 4.14 below shows how to enter a proximity search in the *Find Documents Containing* dialog box. By “proximity search,” we mean a search based on the proximity of words in relation to each other in the document, not just on their occurrence in the document.



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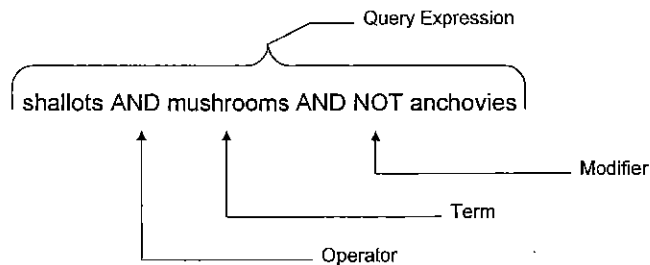
Figure 4.14: *Find Documents Containing* dialog box with search criteria entered for a proximity search.

In [Figure 4.14](#), the **Near each other** option has been selected from the drop-down list and the **Near** numeric value has been set to 14. When this search is performed, iManage DeskSite finds only those documents in the database that contain the words **client** and **complaint** within 14 words of each other. The two words can appear in any order, but they cannot be separated by more than 13 words.

Search Elements

A query expression is the criteria used to perform a full text search. It is comprised of several elements, either explicit or implicit: operators, modifiers, and terms.

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Operators

Operators are codes that represent logic to be applied to a search. These are listed and defined in the following section, *Operators*. To specify an operator in a search, type the operator in less than/greater than brackets and then the word or phrase that you want to find, as in *<STEM> facilitate*.

Although operators need not be entered in all caps, they appear in this chapter as such for the sake of clarity.

Modifiers

Modifiers adjust the default meaning of a given operator. For example, the CASE modifier would make the WORD operator case sensitive. The modifiers are listed and defined under "Modifiers" on page 124.

Simple and Explicit Syntax

You can perform a full text search according to *simple* or *explicit* syntax.

Simple Syntax

Simple syntax refers to when you enter just terms with no accompanying codes or punctuation. iManage DeskSite produces matches as if the terms are preceded by the STEM operator. Although they are less exact, simple searches net more matches than explicit ones.

Explicit Syntax

You can use explicit syntax by enclosing a word in double quotation marks. When you double-quote a word, iManage DeskSite performs a literal search; *facilitator* and *facilitation* would **not** be offered as matches to *"facilitate"*.

Other Syntax Options

Parentheses

Parentheses indicate the order in which the search is to be executed. iManage DeskSite reads information within parentheses before looking at whatever may be outside them. For example, suppose you were to enter the following search:

(Homer AND Marge) OR Bart

iManage DeskSite would look for documents that refer to *Homer* and *Marge*—not just one or the other. Any documents that referred to *Bart* also would be included.

Parentheses can also be placed within each other. The following example means, “Find documents that contain either *Homer* or *Marge*—it doesn’t matter which—as long as the document also contains *Bart*. Also, give me any documents that mention *Lisa*.”

(Bart AND (Homer OR Marge)) OR Lisa

Double Quotation Marks to Search for Operator Words

To search for a word that happens to be an operator, such as AND or NOT, put the word in double quotation marks to indicate that the word should be considered as such, not as an operator. For example, to search for the phrase *Lewis and Clark*, you would enter:

Lewis “and” Clark

Operators

This section lists each of the operators used in full text and profile searches.

Profile Field Operators

Some operators work only in profile fields.

> (Greater Than)

The greater than sign can be used to search for documents that contain a value in a particular profile field that is greater than a specified minimum value. For example, to select documents with a document number greater than 2500, enter the following criteria in the Document Number profile field:

> 2500

>= (Greater Than or Equal To)

The greater than or equal to sign searches for documents that contain a value in a particular profile field that is greater than or equal to a specified value. To search for documents with a document number greater than or equal to 2800, enter the following criteria in the Document Number profile field:

>= 2800

< (Less Than)

The less than sign can be used to search for documents that contain a value in a particular profile field that is less than a specified maximum limit. For example, to search for documents with a version number less than 3, enter the following criteria in the Version Number profile field:

< 3

<= (Less Than or Equal To)

Like the greater than or equal to sign, the less than or equal to sign combines the searching power of the less than and equal to signs. To search for documents with a version number less than or equal to 3, enter the following criteria in the Version Number profile field:

<= 3

Full Text and Comment Operators

The following operators work in full text searches of profile comments and full documents.

<AND>

This Boolean operator finds documents that contain both terms on either side of it. While the OR operator broadens a search, the AND operator narrows it. Use AND to connect terms with different meanings. The search query *New England AND North Dakota* would find only documents that contain **both** phrases; if a document contained only one of the terms, it would not be included in the search results. Enclosing brackets are optional on the AND operator.

<NEAR>

The NEAR operator is similar to AND in that only documents that contain both terms are included in the search results; however, NEAR presents matches that contain both terms close together. For example, suppose you enter the following search:

lincoln <NEAR> beard

The search criterion finds documents with the words lincoln and beard near each other.

4**<NEAR/n>**

The <NEAR/n> operator is a more specific variety of the NEAR operator in that you specify the maximum distance allowed between each term. The N variable can be any whole number between 1 and 1,024 (exclude the comma in numbers greater than 999), where 1 indicates that the terms are adjacent. For example, suppose you enter the following criteria:

jefferson <NEAR/7> crop

The search criterion finds documents with the words jefferson and crop within seven words of each other.

<OR>

OR is a Boolean operator that finds documents that contain at least one of the terms to which it is applied. The OR operator enlarges the search topic and is normally used to look for terms that have similar meaning or refer to similar subjects. The search criterion *louis armstrong OR satchmo* would find documents with one or both of the terms. The enclosing brackets are optional on the OR operator.

<PARAGRAPH>

The <PARAGRAPH> operator searches for documents that include all of the given search elements within a paragraph. You can specify search elements in a sequential or random order.

To get documents that contain variations of the word *wombat* and the phrase *ice cream* in the same paragraph, enter:

wombat <PARAGRAPH> ice cream

If you search for more than two words or phrases, you must include the PARAGRAPH operator between each word or phrase. For example, suppose you enter the following criterion:

oak <PARAGRAPH>maple<PARAGRAPH>ash tree

The search finds all documents that have oak, maple and ash tree in the same paragraph.

<SENTENCE>

The <SENTENCE> operator searches for documents that include all of the given search elements within the same sentence. For example, suppose you enter the following criterion:

automobile industry <SENTENCE> aftermarket

The search finds all documents that have automobile industry and aftermarket in the same sentence.

You can specify words in sequential order by using the SENTENCE operator in conjunction with the ORDER modifier.

<STEM>

The <STEM> operator searches for documents that include variations of the word you specify, as well as explicit matches. For example, to search for documents that contain a variation of the word *distill*, you would enter the following criterion:

<STEM> distill

Matching documents would include the terms *distill*, *distillation*, *distillery*, *distilling*, *distilled*, and *distills*.

Note: The <STEM> operator is used by default and does not need to be specified. To override <STEM>, put the term in double quotation marks.

<THESAURUS>

This operator selects documents that contain one or more synonyms of the word you specify. To locate documents containing synonyms of big, enter the following:

```
<THESAURUS> big
```

Matching documents include words such as large, vast and extensive.

<TYPO/N>

The TYPO/N operator performs approximate pattern matching to identify words that are similar to the query term. You can use this operator to search for documents that have been scanned using an Optical Character Reader (OCR). Since the TYPO/N operator must scan the entire index to find potential matching words, this operator is not practical for use in databases containing over 100,000 documents or in performance-sensitive environments.

If you wish, you can specify a variable (N) to define the maximum number of errors between the query term and a matched term. This value is called the error distance. If you do not specify an error distance iManage DeskSite uses 2 as a default. This means that there can be a maximum of 2 differences between the query term and the matched term. An error is defined as a character insertion, deletion or replacement. For example, the following table shows word matches with an error distance of 1:

Query and Term	Matching Term	Explanation of Error
<TYPO/1> Mouse	House	H replaces M
<TYPO/1> Agreed	Greed	A is deleted
<TYPO/1> Cat	Coat	O is added

The following table shows a word match with an error distance of 3:

Query Term	Matching Term	Explanation of Error
<TYPO/3> Sweeping	Swimming	I, m, m replace e, e, p respectively

The following table shows a word match with an error distance of 2:

Query Term	Matching Term	Explanation of Error
<TYPO/2> Swept	Kept; wept	S is deleted and K replaces W; S is deleted (1 error does not exceed the maximum error distance of 2)
<TYPO> Swept	Kept; wept	Same as above since the error distance 2 is the default

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<WORD>

The <WORD> operator searches for documents that include a given word. For example, to search for documents that contain the word *carrot*, you could enter <WORD> *carrot*. The WORD operator is only needed when you want to use a modifier, such as CASE, as a search term.

<WILDCARD>

Using wildcard symbols lends a great deal of flexibility to full text searches. Wildcards can be used when searching for word prefixes, roots, suffixes, plurals, and to find words that have variations in spelling. The wildcard characters recognized by iManage DeskSite are listed in Table 4.2. Use the <WILDCARD> operator to indicate when you are using wildcard symbols.

Note: Wildcards usually increase the scope of a full text search and can also increase the time it takes to complete them. In particular, using a wildcard symbol at the start of a word can greatly increase search time, because every entry in the index must then be searched.

Table 4.2: Wildcard Symbols used for Full Text Searching

Symbol	Explanation
?	The question mark replaces any single alphanumeric character. For example, <WILDCARD> b?m would match <i>born</i> , <i>barn</i> , or <i>burn</i> . Similarly, <WILDCARD> ?andy would match <i>candy</i> , <i>dandy</i> , or <i>sandy</i> . You can use more than one question mark within a term; for example, WILDCARD sh??e could produce <i>shore</i> and <i>shade</i> as matches.

Table 4.2: Wildcard Symbols used for Full Text Searching

Symbol	Explanation
*	The asterisk is used to represent any number of alphanumeric characters (including none). For example, WILDCARD *vert* would match convertible, inverted, vertigo, and covert. When using the asterisk wildcard, try to narrow the potential scope of the wildcard entry as much as possible. For instance, to find documents about automobiles, the criterion WILDCARD auto* finds the words auto , automobile , and automotive , but it would also find autobiography , autocracy , and autograph . A more specific query is <WILDCARD> auto OR automo*.
[]	<p>Brackets tell iManage DeskSite to find one of any character within the brackets. For example, <WILDCARD> r[ou]t would match documents that contain <i>rat</i>, <i>rot</i>, or <i>rut</i>.</p> <p>When you enclose a caret (^) within brackets, the search excludes the string of characters to the right of the caret. For example, if you enter WILDCARD '[^block]head', the term <i>blockhead</i> is not included in the search results. Note that you must place the caret before the string of characters you want to exclude, for example WILDCARD '[^block]head', but not WILDCARD '[block^]head'.</p> <p>When you enclose a hyphen (-) within brackets between two letters, iManage DeskSite looks for every term within that alphabetical range inclusively. For example, suppose you were to enter WILDCARD 'a[a-w]a', iManage DeskSite looks for every matching three-letter term from aaa to awa.</p> <hr/> <p>Note: When you use brackets, you must enclose the word that contains character string with backquotes ('). The character string cannot contain spaces.</p>
{ }	<p>Braces are similar to brackets but let you search for groups of characters, separated by commas. For example, <WILDCARD> spill{s,age,ing} would match documents that contain <i>spills</i>, <i>spillage</i>, and <i>spilling</i>.</p> <hr/> <p>Note: When you use braces, you must enclose the word that contains character string with backquotes ('). The character group listing cannot contain spaces.</p>

Literal Searches for Wildcard Characters

If you want a wildcard character to be interpreted as text and not as a wildcard,

precede the character with a backslash (\). For example, if you wanted to search for the term M*A*S*H, you would enter <WILDCARD> m*a*s*h.

Modifiers

Modifiers fine-tune the performance of your chosen operators. For example, you can use the <CASE> modifier with the <WORD> operator to make the search case-sensitive.

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<CASE>

The <CASE> modifier makes <WORD> and <WILDCARD> searches case-sensitive. For example, the criterion <CASE> <WORD> *President* would retrieve documents that contained the word *President*; occurrences of *president* or *PRESIDENT* would be ignored.

<NOT>

Used with the AND and OR operators, NOT tells iManage DeskSite to exclude documents that contain a given term. For example, to retrieve documents that contain the words *mushrooms* and *olives* but not the word *anchovies*, you would enter:

```
mushrooms <AND> olives <AND> <NOT> anchovies
```

<ORDER>

The <ORDER> operator matches terms based on the order in which they appear in the query expression. This modifier can be used with the NEAR/N operator.

The ORDER modifier must appear in front of the operator name. For example, if you wanted to search for the word *iced* followed by the word *mocha* in the same phrase, you would enter the following criterion:

```
iced <ORDER> <PHRASE> mocha
```

CHAPTER 5

Integrated Application Operation

5

Overview

The iManage Integrated Application Operation allows a user to perform iManage functions directly from the application they are using. This integration eliminates the need to switch to the iManage DeskSite application to perform certain iManage tasks.

iManage DeskSite is actively integrated with most major Windows applications, including:

- Microsoft Office 97 and 2000
- Corel WordPerfect Suite (8) and WordPerfect Office 2000
- Watermark Professional
- Any ODMA-Compliant Application
- Lotus Notes
- Novell GroupWise 5.2 or 5.5
- Microsoft Outlook
- Any MAPI compliant E-mail
- Lexus/Nexus Office Suite 7.x (CompareRite, CiteRite, CheckRite, FullAuthority)

In addition, if you are using Microsoft Office 2000, another integration option is available, called Passive Integration. This is an option that your system administrator may set, according to the needs of your system.

What does it mean to be “integrated” with other applications?

Active Integration

When iManage DeskSite is integrated with another application, certain functions in the other application are slightly changed. The functions usually affected are: **Open, Close, Save, Save As, Insert, Print, and Exit**.

There are also new commands that exist only in integration mode. They are: **Local Open, Local Save, Versions** and **Edit Profile**.

Passive Integration

When the Passive Integration option is set on systems using Microsoft Office 2000, the **iManage Open** and **iManage Save As** menu options become available.

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Non-Integrated Applications

In some cases, an application cannot be integrated with iManage DeskSite. In those cases, iManage DeskSite's functions will not be available from within the application. You can still organize, track, and store your documents using iManage DeskSite. You will need to, however, follow this general procedure to open a document:

1. Launch iManage DeskSite and log into a WorkSite Middle Tier Server.
2. Search for and find the document that you want to open.
3. **Checkout** the document from the database.
4. Launch the application, if it is not already running.
5. **Open** the document from within the application.

When you are finished editing or revising the document:

1. Launch or switch focus to iManage DeskSite.
2. Use the **Checkin** option to copy the revised document back to the database.

Startup

In most cases, when you first launch an integrated application, the application automatically detects whether iManage DeskSite is running and launches it if

necessary. In other cases, the integrated application launches iManage DeskSite when you select an integrated function from the **File** pull-down menu.

If iManage DeskSite is running but you are not logged into an iManage server, iManage tries to log into a WorkSite Middle Tier Server. If Autologin settings are available, iManage DeskSite tries to do this automatically. If Autologin settings are not available, or if iManage DeskSite is running, but you are not logged into a WorkSite Middle Tier Server, the *Register Servers* dialog box appears, as shown in Figure 5.1.

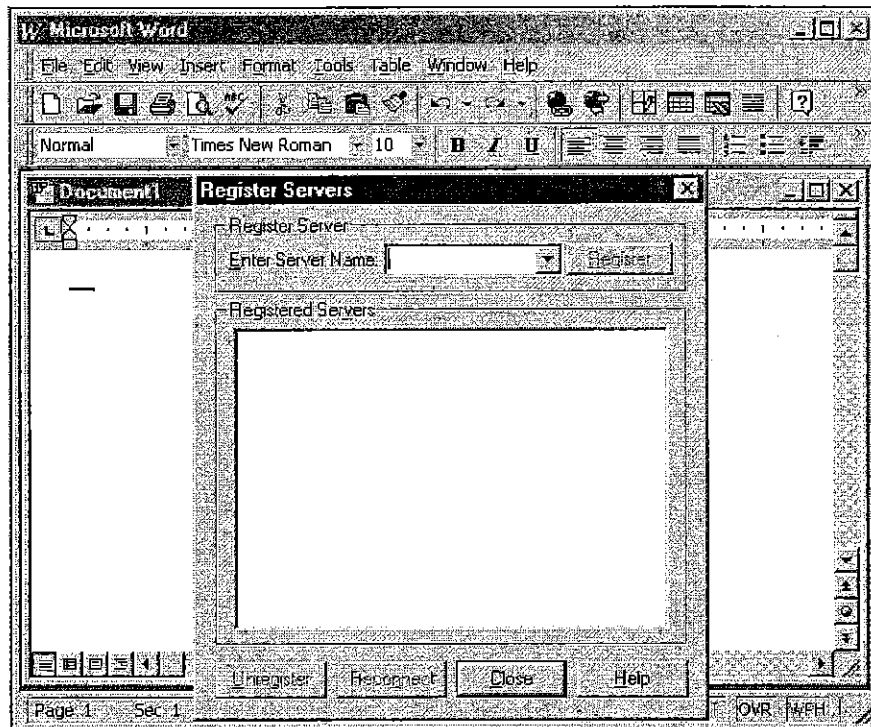


Figure 5.1: Login to iManage Server dialog from an integrated application

1. Type the name of the server in the Enter Server Name field, then click **Register**. The *Login* dialog box opens.

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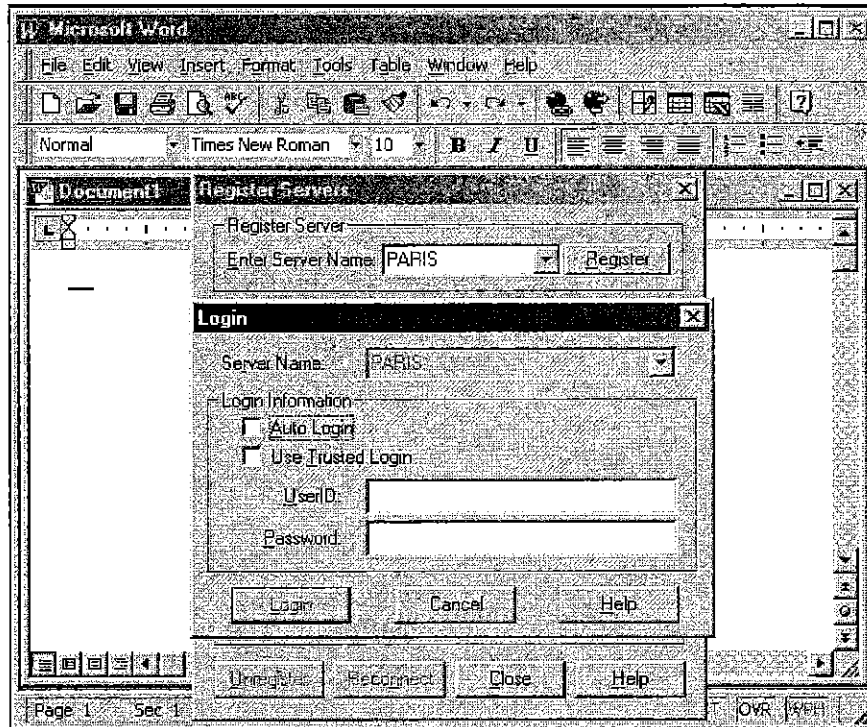


Figure 5.2: Login dialog box in an integrated application

2. Select the type of **Login** that you want to use. See Chapter 3 for more information about connecting to the DMS.
3. (Optional) Complete the UserID and Password fields. You will complete this step only if Login that you have selected requires this information.
4. Repeat Steps 1 through 3 for each server you want to use and then click **Close**.

File Menu From within Integrated Applications

Active Integration

An application's file menu changes in a number of ways when the application is integrated with iManage. The figure below displays what the MS-Word 97 File menu looks like when integrated. Many of the command's behaviors change and some new options appear. This section details each of these commands.

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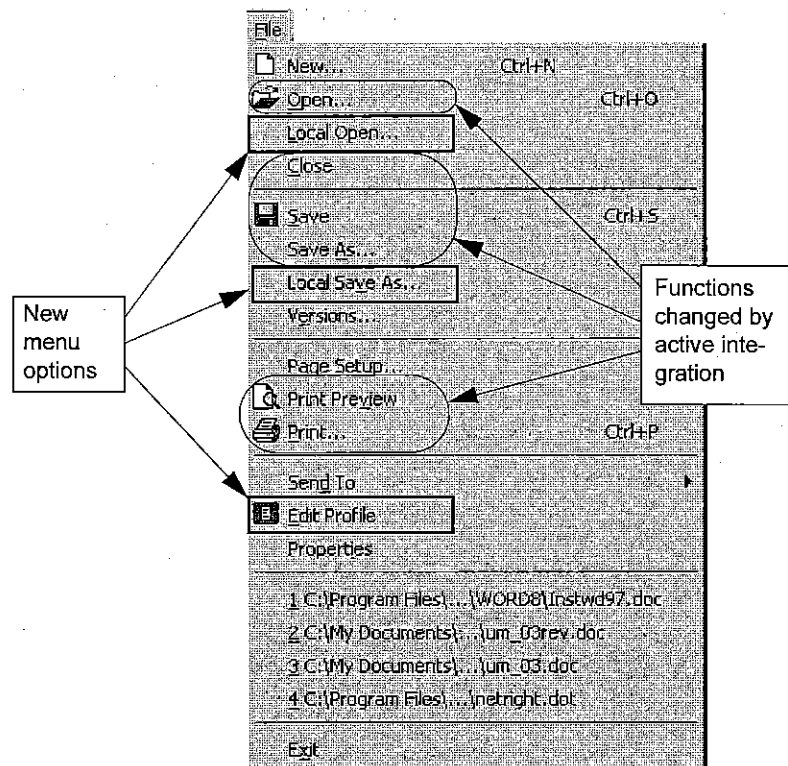


Figure 5.3: File menu from Microsoft Word 97 while in Active Integration mode with iManage DeskSite.

Open:

When an application is integrated with iManage DeskSite, and a user selects the **Open** command in the application, iManage launches the *iManage Integrated Desktop*. The next section of this chapter outlines all the functionality of the *iManage Integrated Desktop*.

Local Open:

The **Local Open** command exists only if the application is integrated. Selecting it launches a standard Windows *Open* dialog box, which you can use to locate files on your local hard drive or on the network. You can use this option to open a document that is not in an iManage library.

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Save:

If the document already exists in iManage DeskSite the **Save** command simply replaces the original document. For documents that do not exist in an iManage DeskSite the **Save** command launches a *New Document Profile* dialog to allow you to enter profile information for the new document.

Save As:

When you select the **Save As** menu item from the **File** menu in an integrated application the *Save As Options* dialog box is launched. You now have three options:

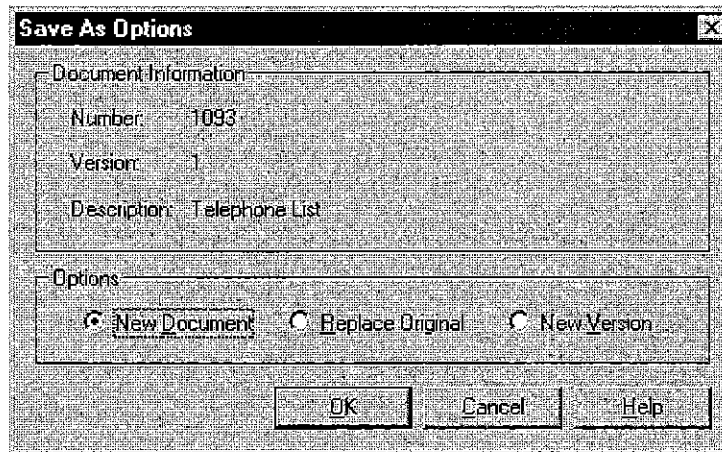


Figure 5.4: The *Save As Options* dialog box appears when you select **Save As** from the **File** menu in an integrated application.

- **Save as a new document:** This launches a *New Profile* dialog box. Enter the new document's profile information.
- **Save as a replacement for the original document:** This saves the document as the same document number and version. It replaces the iManage DeskSite version. This option is, in effect, the same as selecting **Save** from the **File** menu. If you have read-only access to the document you cannot use this option. Instead, save the document as a **New Document** or **New Version** of the original document.
- **Save as a new version of an existing document:** iManage DeskSite automatically assigns a new version number to the document and a dialog box displays to enter the new version's profile information.

If your application is ODMA-compliant, iManage DeskSite remembers the option you used the last time you performed the **Save As** command and uses that option as a default. However, your system administrator can set a specific option to use as the default all the time.

If the active document does not exist in iManage DeskSite when you select the **Save As** command, then a *New Profile* dialog opens for you to enter the new document's profile information.

5

Local Save As:

When you select **Local Save As** from the **File** menu in an integrated application, a standard Windows *Save As* dialog displays. Use this dialog box to save your file on a local hard drive or other directory available on the network. When you use the **Local Save As** option, you are saving the file independently of iManage DeskSite and any libraries to which you may be connected. If your document originated from an iManage database, the **Local Save As** option does not automatically update the original copy of the document with any changes you may have made.

Note: The **Local Save As** command is a convenient method of making a copy of a document outside the iManage DeskSite document management system. Simply open a document that is in an iManage database, then use the **Local Save As** command to save a local copy of it. The **Local Save As** option is equivalent to using the **Export** function in iManage DeskSite.

Note: **Local Save As** and **Local Open** may be disabled in selected applications by your system administrator.

Print:

Printing documents in integrated applications is the same as printing documents in non-integrated applications. The only difference is that the document's activity history in iManage DeskSite is updated to show that the document was printed, how many pages were printed, and who printed the document. If a document is printed that does not currently exist in iManage DeskSite, a warning message may appear.

5

Edit Profiles:

When you select **Edit Profile** from the **File** menu in an integrated application, iManage DeskSite's standard dialog box for viewing or editing document profile information appears. Users who have read-only access to a document cannot change the information displayed in this dialog. Users with read-write access can change certain fields, such as the comments. Only the Author and Operator of a document have the full authority to change such criteria as the access privileges to the document.

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Figure 5.5: The default appearance of the *Profile Edit and View* dialog box. Your system administrator can customize this dialog box.

Close:

You close a document in an integrated application the same way you close a document in the non-integrated application. Whenever you close a document in an integrated application, you will be given the option of saving the document if the contents have changed since the document was opened. [Figure 5.6](#) shows an example of the message box that you will receive when you close a document in an integrated application.

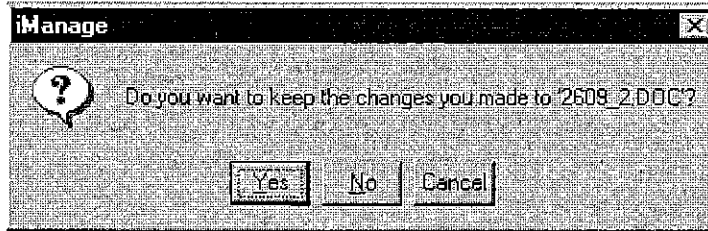


Figure 5.6: Example of the message box that appears when you close a document in an integrated application.

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If you select **Yes** from this message box, iManage DeskSite responds as if you selected **Save** from the **File** menu. If the document is not already in an iManage database, you are prompted to enter profile information for the new document.

Passive Integration

If you are running Microsoft Office 2000 applications, your system administrator may set up passive integration. Most menu options remain the same as with Active Integration. There are a few differences.

For more information about using infoLook with Microsoft Office 2000 applications, see the *iManage Office 2000 Integration Module Installation and User's Reference Manual*.

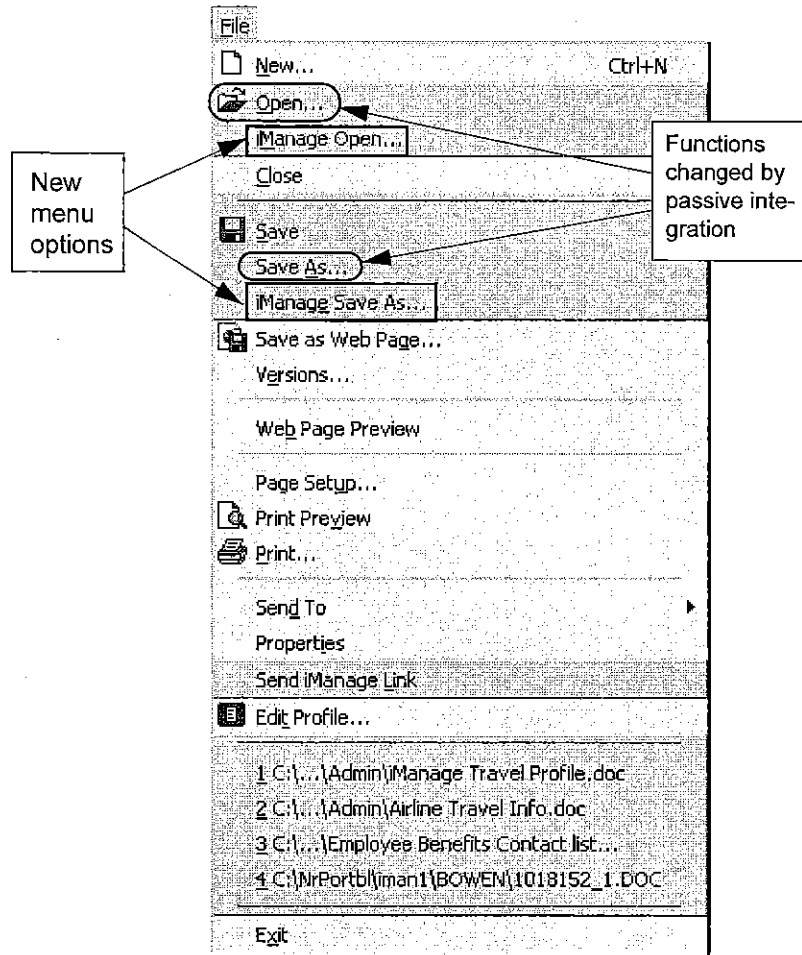


Figure 5.7: File menu from Microsoft Word 2000 while passively integrated with iManage DeskSite

Open

The **Open** command launches a standard Windows *Open* dialog box, which you can use to locate files on your local hard drive or on the network. You can use this option to open a document that is not in an iManage library.

iManage Open

When an application is passively integrated with iManage DeskSite, and a user selects the **iManage Open** command in the application, iManage launches the *iManage Integrated Desktop*, explained in detail in the next section.

Save As

When you select **Save As** from the **File** menu in a passively integrated application, a standard Windows *Save As* dialog opens. Use this dialog box to save your file on a local hard drive or other directory available on the network. When you use the **Local Save As** option, you are saving the file independently of iManage DeskSite and any libraries to which you may be connected. If your document originated from an iManage database, the **Save As** option does not automatically update the original copy of the document with any changes you may have made.

iManage Save As

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When you select the **iManage Save As** menu item from the **File** menu in a passively integrated application the *Save As Options* dialog box launches. You have three options:

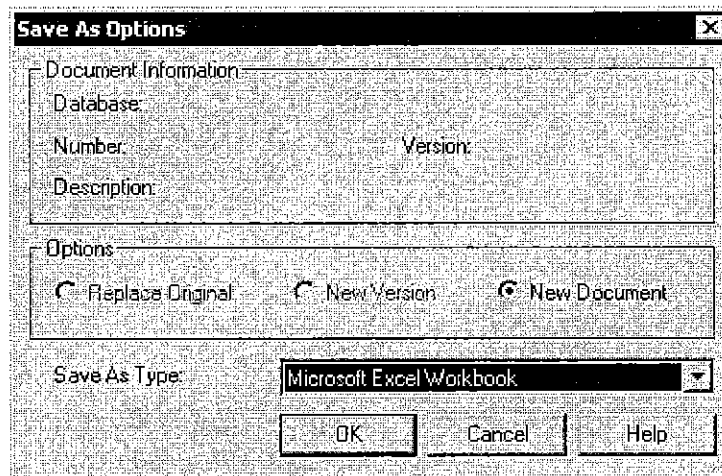


Figure 5.8: *Save As Options* dialog box for Microsoft Office 2000 applications

- **Save as a new document:** You may select the **Save As Type** by selecting from the drop down list. The list is the same as the list you would see in the Microsoft Office 2000 application you are using. When you click OK, a *New Profile* dialog box launches. Enter the new document's profile information.
- **Save as a replacement for the original document:** This saves the document as the same document number and version. It replaces the iManage DeskSite version. This option is, in effect, the same as selecting **Save** from the **File** menu. If you have read-only access to the document you cannot use this option. Instead, save the document as a **New Document** or **New Version**

of the original document. This option does not allow you to select the **Save As Type** from the drop down list.

- **Save as a new version of an existing document:** iManage DeskSite automatically assigns a new version number to the document and a dialog box displays to enter the new version's profile information. This option does not allow you to select the **Save As Type** from the drop down list.

iManage Integrated Desktop

As has been detailed earlier in this chapter, iManage documents can be accessed directly through an Integrated Application. The Integrated Desktop is the dialog that appears instead of the standard Windows dialogs that normally appear in non-integrated applications.

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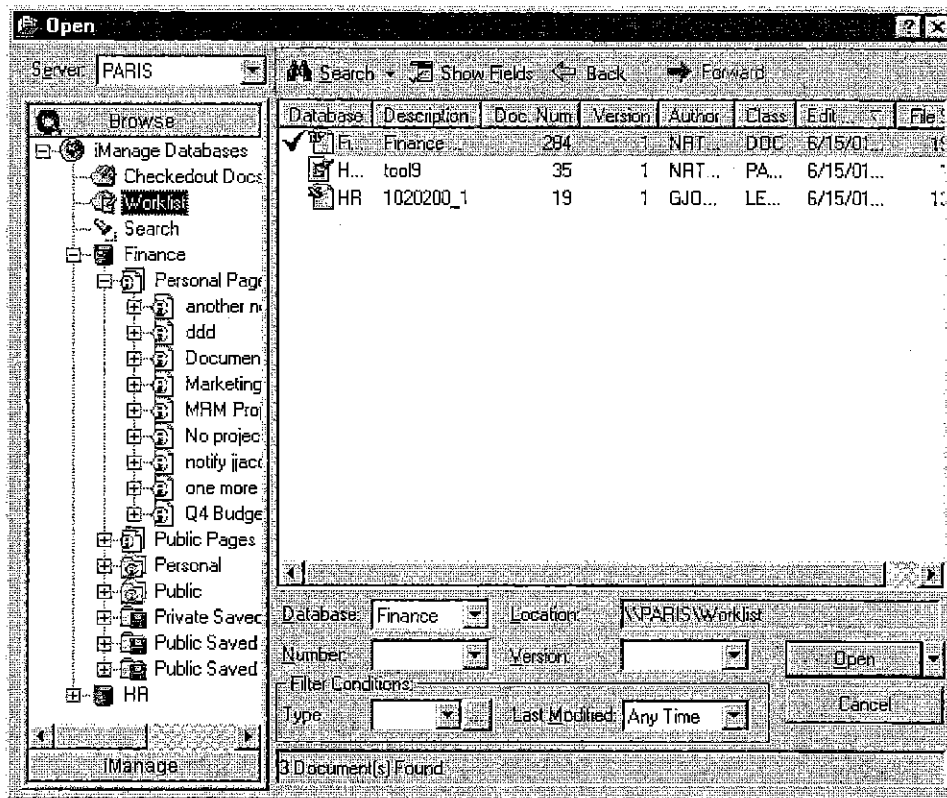


Figure 5.9: Integrated Desktop Main Window

Integrated Desktop: Main Window

Tree Frame:

On the left side of the Integrated Desktop is the Tree Frame. It contains the organizational structure of all servers, libraries, iManage WorkSite pages if any, folders, worklists and saved searches. Clicking a page icon displays the folders listed

on an iManage WorkSite page. Clicking a folder icon displays the contents of that folder in the **Document List**.

Pages

If Pages were created in the iManage WorkSite application, you can see the page structure in iManage DeskSite. You can access documents from folders on these pages and perform all activities on them that you can perform to documents in other folders. The activities you can perform depend on your Role and the access rights you have to the Pages and Folders. You cannot create Pages in the iManage DeskSite application.

Folders

Libraries contain folders, which are static groups of documents you can create or share with other users. Folders provide a method for organizing and sharing documents easily. To display the contents of a folder, click the icon for that folder and the documents within it appear in the Document Grid.

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Document List:

All the documents of a highlighted folder in the **Tree Frame** are displayed in this Document List view. You can organize the list in Ascending or Descending order by clicking the column heading.

You can also narrow the focus of documents in the Document List by using the Document Number and Document Version pull-down menus in the Filter Conditions section at the bottom of the window.

To configure which columns appear in this Document List, click



The *Document List Column Selection* dialog launches.

Shortcut Bars:

The **Browse Bar** contains the **Folder Tree** to locate any document on the server you are logged on to. A user can create Shortcut bars beneath the Browse Bar to keep folders. The iManage Shortcut Bar exists as a default and can not be deleted.

To Create a Shortcut Bar:

1. Right-mouse click on the iManage Shortcut Bar.
2. Select **Add Group** from the pop-up menu.

3. Name the new group in the space provided.
4. Click on any other Shortcut Bar.

To Delete a Shortcut Bar:

1. Right click once on the Shortcut Bar you wish to delete.
2. Select **Remove Group** from the pop-up menu.

To Insert Folders into your Shortcut Bar:

1. In the Folder Tree, right-mouse click on the folder you would like to add to a shortcut bar.
2. In the menu displayed, select **Add to Shortcutbar**.
3. Select the specific Shortcut Bar where you wish to insert the folder.

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Integrated Desktop: Searching for Documents

New Search

Click **Search** at the top of the Integrated Desktop Window to perform a standard iManage search. The *Search* dialog form is customizable so the options available on the form vary. The *Document Search* dialog is designed in the iManage Dialog Editor application that is usually not accessible by anyone but the System Administrator. For detailed information on searches, see [Chapter 4: Searching for Documents](#).

Navigation Buttons

Forward

Click **Forward** to navigate to a folder lower in the tree structure that you looked at previously and then moved back from.

Back

Click **Back** to navigate to a folder higher in the tree structure.

Integrated Desktop: Document Commands

Open, Insert, Insert Link, etc

The user launches the Integrated Desktop most often because he or she simply

wants to access a document in iManage. If you reach the Integrated Desktop by clicking Open from an application's File menu then you most likely just want to open the document in the application. To do this, double-click the document. If you reach the Integrated Desktop by clicking Insert File or Insert Link from an application, navigate to the document and click open. iManage inserts the document or link at the point of your cursor. You can perform all the usual functions from the Integrated Desktop.

Versions

To view a list of document versions, highlight the desired document and right-mouse click. Select **Versions** from the pop-up menu.

History

To view the document history of a particular document, highlight the desired document and right-mouse click. Select **History** from the pop-up menu.

The *History* dialog displays the activity record for a particular document in chronological order. The fields displayed in the activity table are User, Application, Activity, Date-Time, Duration, Pages Printed, Location, and Comments. The Document History table is not customizable.

The kinds and number of activities recorded for this history is up to your system administrators but typically include:

- Opening and closing the document in an integrated application.
- How long the document was open.
- Editing the document's profile.
- Changing the access rights of the document.
- Printing a document and how many pages were printed.
- Checking out, copying and/or checking in the document.
- Viewing the document.
- Mailing the document through e-mail.
- Creating a new version of the document
- The computer (location) where the activity took place.
- Comments about the activity.

Related Documents

To view related documents, highlight the desired document and right-mouse

click. Select **Related Documents** from the pop-up menu.

Document relations are one of the ways you can organize and group documents, in addition to folders and document classifications. See Chapter 3 for more information about related documents.

Edit Profile

To Edit or View a document's profile information, highlight the desired document and right-mouse click. Then choose **Edit Profile** from the pop-up menu.

The *Edit Profile* dialog box displays the document's current profile information. You can edit the information displayed in these fields and then record your changes. For detailed information on document profiles see [Chapter 3: iManage DeskSite: Basic Functions](#).

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Checkout

To checkout a document from the Integrated Desktop, select the document(s) from the **Document List** and right mouse click. Then choose **Checkout** from the pop-up menu.

Use this Checkout feature when you want to work on a document outside the Document Management System (i.e. on your local workstation, away from the network) AND you intend to return the document to the system as the same document. The Checkout feature will prevent anyone else from editing the document while you have it.

Checkin

To check in a document that is marked checked out, select the document(s) from the document table and right-mouse click. Then choose **Checkin** from the pop-up menu:

The *Check In Options* dialog box essentially 'puts back' a document that you previously checked out.

This dialog box presents a number of check-in options:

- **Replace Original:** The checked in copy of the document replaces the original in the database.
- **New Version:** The checked in document is added to the database as a new version of the original document. The original document remains intact.

- **New Document:** The checked in document is added to the database as a new document.
- **Keep Checked Out:** The checked in document remains on the local drive. However you will no longer be able to check the local copy back into the database.
- **Delete Local File:** The local file is deleted after adding it to the database. (This option does not apply if you are checking in portable documents.)

Checkedout Info

If a document is checked out, you can display information about the checked out document by highlighting the document in the Document Grid and selecting **Checkedout Info** from the pop-up menu.

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Export

To **Export** a document, highlight the desired document and right-mouse click. Select **Export** from the pop-up menu.

The document export function is essentially the reverse of document importation: it copies a document from the library to your local hard drive. If you are planning to edit a document and then return it to the database later, it is advisable to use iManage DeskSite's checkout function. See Chapter 3 for more information about exporting documents.

View

To **View** a document, highlight the desired document and right-mouse click. Select **View** from the pop-up menu.

The View command launches a read-only version of the selected document in the iManage View application. See [Chapter 7](#) for detailed information on the View application.

Viewing documents is useful to verify that you have selected the document you want before you check it out.

Unlock

To **Unlock** a document from the Integrated Desktop, select the document(s) from the document table and right mouse click. Then choose **Unlock** from the pop-up menu.

About Unlock

If you have suffered a network failure or system malfunction while you were using documents you may find that those documents are still marked as IN USE. In such instances, you can use the Unlock feature to tell the system to consider the document 'not-in-use'. This allows you or others to checkout the document.

Implications of Unlocking

Any copy of a document that exists locally will be 'orphaned' from the network version after an Unlock is complete. You can only put the local document into iManage as a new document. Therefore, you should only use the Unlock option to free up documents that appear to be in use or checked out, but are erroneously marked as such due to a network or system failure.

Note: You can only unlock documents that are currently marked as IN USE by you. You cannot unlock documents in use by other users.

Remove from folder

The **Remove from folder** menu option removes selected document(s) from a particular folder. To delete a document from a folder, highlight the document(s) to be deleted and right-mouse click. Then choose **Remove from folder** from the pop-up menu.

Note: The **Remove from folder** menu option does NOT remove a document from the network or a particular database. Removing a document from the network or database requires a Purge command. Not everyone who has **Remove from folder** menu option permissions will have Purge permissions. Contact your System Administrator for more information.

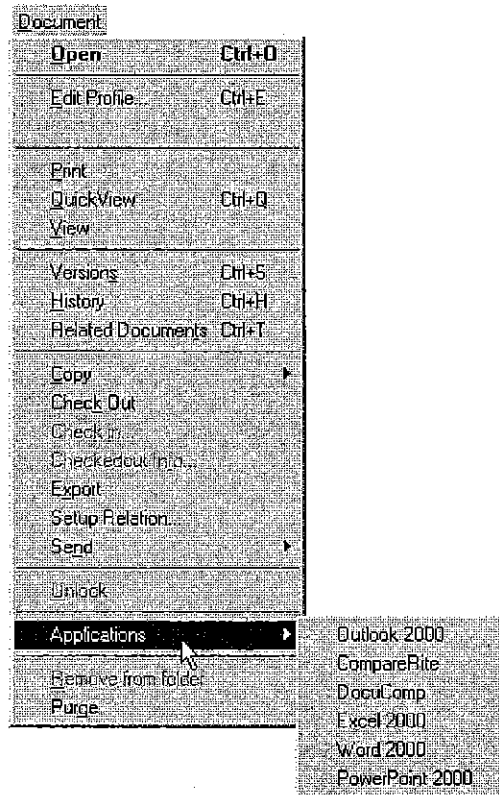
Purge

To *purge* a document is to remove it entirely from the database.

You purge a document from the database by highlighting the desired document in the Document Grid and selecting **Purge** from the pop-up menu. Only the author or operator of a document are allowed to purge a document. This option may also be disabled for some users.

Other Applications

Integration with CompareRite, DocuComp, FullAuthority, and CiteRite



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The iManage DeskSite program includes a direct interface to the following document utilities: CompareRite, DocuComp, FullAuthority, and CiteRite. CompareRite and DocuComp allow you to compare versions of documents with each other and to produce a report of variations. FullAuthority and CiteRite are citation utilities that allow you to analyze the citations that appear in a document. Access to these utilities is provided in iManage DeskSite by selecting **Applications** from the **Document** menu, then selecting the appropriate application.

Users must have a path established to the directories for these utilities. Each iManage database automatically provides entries in the application table for each

of these document utilities.

E-mail Integration

iManage DeskSite is integrated with electronic-mail products through the MAPI interface standard. E-mail systems supported include:

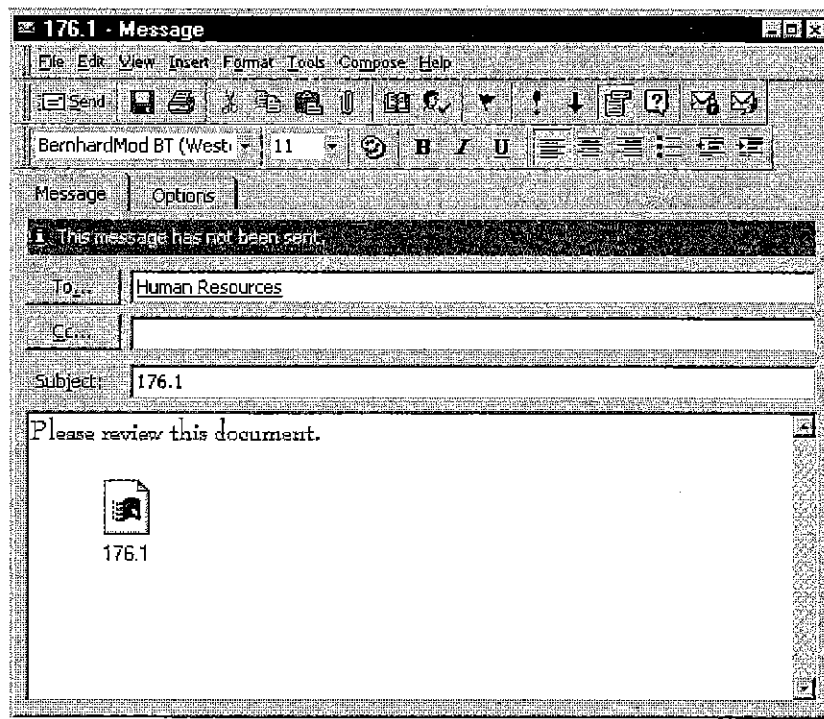
- Network GroupWise
- Microsoft Mail
- Microsoft Outlook
- Lotus cc:Mail
- Lotus Notes
- DaVinci

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About E-mail Integration

The iManage DeskSite program includes a user interface where you can select documents and mail them through electronic mail.

Using standard drag-and-drop techniques, you can select documents that need to be mailed from the iManage Desktop window's Document Grid. Once you have selected the documents, iManage DeskSite can automatically invoke the e-mail-send mechanism. iManage DeskSite uses the MAPI standard to display *Mail To* windows appropriate to the e-mail system present. When sent via e-mail, document profiles have the extension TXT while document filenames have the application's extension—DOC for Word files, WRI for Write files, etc.



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Figure 5.10: Documents selected for emailing appear as attachments in your email application. This screen shot shows how a document appears in Microsoft Outlook.

Additional Integrated Functions

Microsoft Word 97 and 2000

Additional integrated functions are available in selected applications. The following additional integrated functions are available in Microsoft Word 97 and 2000. Your system administrator can disable or enable some of these options selectively.

iManage Mail Merge

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When you select **iManage Mail Merge** from the **Tools** menu, you can perform a mail merge using documents from an iManage database as your master document and data source document. To perform an iManage Mail Merge, select **iManage Mail Merge** from the **Tools** menu, identify a master document and data source document, then perform the mail merge. Links to the data source document are removed when you close the master document.

Compare iManage Documents

When the Compare iManage Documents menu option is enabled by your system administrator, you can compare the currently open document against a document in an iManage database by selecting **Tools**, then **Track Changes**, then **Compare iManage Documents**. If this menu option does not appear, then this option has not been enabled by you iManage Administrator.

iManage Footer

When you select the **iManage Footer** option from the **View** menu, the following information will be inserted in the footer of the currently open document:

Document Name : Document Number – Version Number

If the document name field is empty, only the Document Number and Version Number will be displayed. Other footer information, such as author name, page number, file path information, etc., can be inserted automatically using built-in options in Microsoft Word.

CHAPTER 6

iManage DeskSite Advance Functions

6

Overview

This chapter describes some advanced functions available in the iManage DeskSite program.

- Using CompareRite and DocuComp
- Using FullAuthority and CiteRite
- Setting display options

CompareRite, DocuComp, FullAuthority and CiteRite are not provided with iManage DeskSite.

Other advanced features, such as portable mode and document echoing, are described in [Chapter 7](#) and [Chapter 8](#) of this manual.

Using CompareRite and DocuComp

CompareRite and DocuComp are applications that enable you to compare versions of documents and to produce comparison reports automatically. For the CompareRite and DocuComp menu options available in iManage DeskSite to work properly, these applications must be integrated correctly with iManage DeskSite.

To compare documents using CompareRite or DocuComp:

1. Highlight the two versions of the document that you want to compare in the document grid.