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TeamConnect Search Help

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Administrator Guide

TeamConnect Search Help

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NOTE: Throughout Mitratech product publications, in addition to using full product names where necessary, we also use familiar and shorter terms to increase your ease of reading. You may find the following aliases for our product names:

TeamConnect for TeamConnect Enterprise
Matter Management for TeamConnect Legal Matter Management
TeamConnect Legal for TeamConnect Legal Matter Management
CSM for TeamConnect Collaborati Spend Management
Collaborati Spend Management for TeamConnect Collaborati Spend Management
SOP or SOP Manager for TeamConnect SOP Manager
Legal Hold for TeamConnect Legal Hold
Legal Reports for TeamConnect Legal Reports
Deadlines for TeamConnect Deadlines
AP Link for TeamConnect AP Link
Office Suite for TeamConnect Office Suite
Financial Management for TeamConnect Financial Management
Screen Designer for TeamConnect Screen Designer
Upgrade Toolkit for TeamConnect Upgrade Toolkit

Acknowledgements

This product includes software developed by the following organizations:

Apache Software Foundation (http://www.apache.org/)

OpenSymphony Group (http://www.opensymphony.com/).

The license agreements for these and other supplemental software packages can be found in your installation media in subfolder Supplemental_Software_Licenses. That subfolder also contains Open Source Components.pdf, which lists the locations, license types, and specific versions of components that are available on the web.

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1   TeamConnect Search Help

Welcome to the *TeamConnect® Global Search Help.* This guide details TeamConnect's integration with Elasticsearch for robust, global searching of their instances. Global search will provide full-text searching of documents (including PDFs) and their contents, contacts, records, budget requests and more. ***Note:*** *Global search does not, however, search users or groups, budgets, accounts, or any documents in System folders.*

TeamConnect 5.0 supports Elasticsearch 1.7.4. TeamConnect 5.1 supports Elasticsearch 5.3.0. Please see the Elasticsearch installation guide for more information on configuring and installing Elasticsearch for TeamConnect.

For detail on document versioning and how versions interact with search results, please see [Searching and Version Control](#) .

Search Installation Help	[Search Index Tool Help](#)
[Search Views Help](#)	[Search Filters Help](#)
[Search Modifiers](#)	[Search Admin Settings](#)

For more detailed information on how Elasticsearch works, clusters and nodes, and how the global search indexing functions outside of TeamConnect, please see the Elasticsearch help found [here](#).

1.1   Global Search Filters Help

Details for configuring and utilizing search filters can be found in the table below.

[How do I set up custom global search filters?](#)
[How do I configure filters on the results page?](#)
[How can I view Recently Searched items?](#)

1.1.1   How do I set up global search filters?

System administrators can improve global search by adding list, multi-list, and check-box fields as filters on global search views. ***Note:*** *Only these three types of custom field are able to be selected here. Each field must also be enabled for global search.*

⊟ **Setting up global search filters**

1. Click **Setup**. From the **Go to...** dropdown menu, select **Object Definitions**.

2. Click the object to be filtered.

3. Click the **Search Views** tab on the selected object.

4. Select a search view *that has the Global Search check-box checked.* Or, select the Global Search check-box upon opening the search view. For more help, see How do I set up Global Search Views?

5. Click **Filter Display**.

6. From this page, you are able to select global search-enabled list, multi-list, and check-box fields. After adding your fields with labels and order values, select **Save and Close.**

7. See How do I configure filters on the results page? for further information on using the new filtering.

1.1.2   How can I view recent searches?

Recent searches can be returned to via the **Recent Searches** dropdown in the upper-right corner of the screen.

The Recent Searches dropdown will store up to 5 of your most recent searches. The list will reset each time you log out and log in.
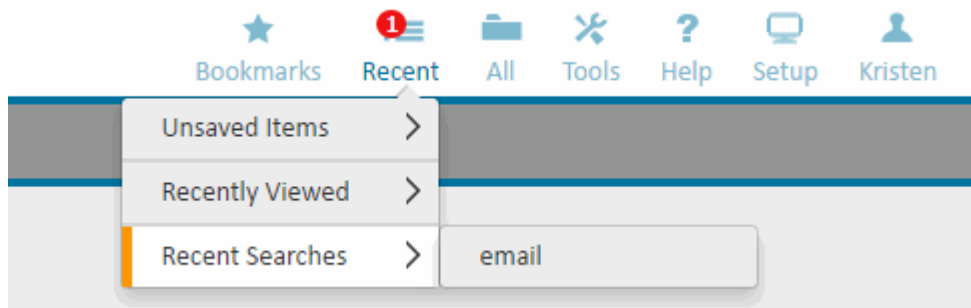
Recent Searches Dropdown

1.1.3   Filtering on the Results Page

Filters on the results page can be utilized to improve efficiency in retrieving results. The following notes provide more detail on using this functionality.

- As some objects may be under multiple categories, child objects will reflect a higher number than what may be accumulated in the parent category.

    Example Filter Tree:

    Contracts (5)

US Contracts (4)*

Southern US (3)*

Texas Contract

Louisiana Contract

Alabama Contract

Midwest US (2)*

Texas Contract

Iowa Contract

Int'l Contracts (1)

Europe (1)

France Contract

After selecting the desired filter buttons, click **Apply Filters.** The results do not auto-refresh after each checkbox is selected. Click **Clear Filters** to return to the initial results screen.

- Parent categories will be automatically selected if a child category checkbox is clicked.

- Click the left and right arrows next to the scroll bar to expand or collapse the filter window for more detail.
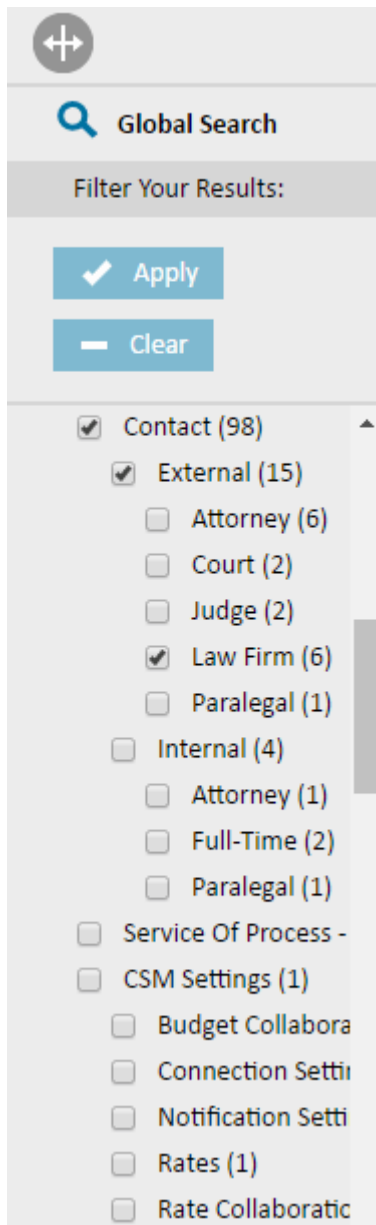
Filtering on Search Results

1.2   Global Search Views Help

The following sections detail Global Search Views and tasks associated with configuring these views.

[How do I set up Global Search Views?](#)	[How do I omit custom fields from Global Search?](#)

| How do I set up Global Search Filters? | How do I disable objects from Global Search? |

1.2.1   How do I set up Global Search Views?

TeamConnect Search allows for robust customization of search views. Users are able to set up custom views for global search as well as add custom fields to the search results of an object. Users can also omit custom fields from being searchable, as detailed here, or entire objects, as detailed here.

Adding Custom Fields to Objects for Global Search

The procedure below outlines the preliminary steps to adding custom fields to search views. For more detail, see Creating Custom Fields. If you have already added custom fields to your object, proceed to **Selecting and Updating Global Search View** for documentation on including these custom fields in global search.

1. Click **Setup** in the upper-right corner of TeamConnect.

2. Select **Object Definitions** from the Go to... dropdown menu and select the desired object.

3. Click **Custom Fields.** *Important: Any changes to the custom fields on a record type will require a re-index of this record type for the changes to reflect in the global search results. See Global Search Index Tool Help for more information.*

4. Enter in the details of the custom field (Name, Label, Type, Is Required?, Default Value (if applicable), Exclude from Custom Search, Exclude from Global Search). Make sure to leave **Exclude from Global Search** at the default "No" setting. More information on this screen can be found at Custom Fields Tab of Object Definitions.

5. Save or Save and Close. The field will now be added.

6. Update the new field within your object. Save.

These fields can be viewed on the **Details** page of the object.

Adding Detail to New Custom Field

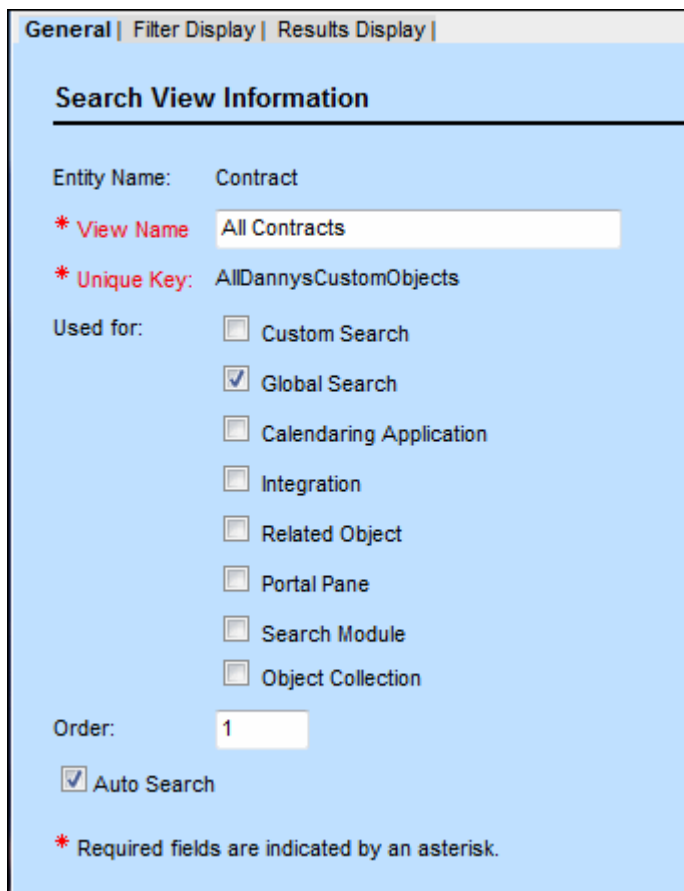## Selecting and Updating Global Search View

The following procedure outlines how to add *existing* custom fields on objects to global search.

1. Click **Setup** in the upper-right corner of TeamConnect.

2. Select **Object Definitions** from the Go to... dropdown menu and select the desired object.

3. Click **Search Views.**

4. Select the desired existing search view or create a new search view.

5. From the **General** tab, select Global Search from the "Used for:" section. ***Note:*** *Global Search and Custom Search are exclusive options; selecting either of these will automatically remove any selected check-boxes below.*

General | Filter Display | Results Display |

Search View Information

Entity Name: Contract

* View Name   All Contracts

* Unique Key: AllDannysCustomObjects

Used for:
- ☐ Custom Search
- ☑ Global Search
- ☐ Calendaring Application
- ☐ Integration
- ☐ Related Object
- ☐ Portal Pane
- ☐ Search Module
- ☐ Object Collection

Order: 1

☑ Auto Search

* Required fields are indicated by an asterisk.

Selecting Search View Usage

6. Select the **Results Display** tab.

7. Type in the desired column name. Select the custom field from the **Custom** drop-downs and the desired Order and Column Number. The Order selection will determine where the selected field will exist within the set column. Save the record.

Adding a Page to Search Results Display

8. Navigate back to the **Search Views** tab on the object. On the "Use this search view's results display for global search:" dropdown menu, ensure that the recently edited search view is selected. Save and close. *Note: If your search view is not present, go back to Step 5 of this procedure.*

9. Re-index the selected object using the Global Search Index Tool. Refresh page. Custom field will now be visible in search results.

1.2.2   How do I disable objects from Global Search?

Users may want to disable objects from Global Search for security reasons or to enhance the performance of the search.

In order to remove objects from global search as well as remove all associated files from the search server, follow the steps below.

Disabling Objects from Global Search

1. Click **Setup.**

2. Select **Object Definitions** from the **Go to...** dropdown menu.

3. Select the object to be disabled.

4. From the General tab on the object, click the check-box for **Remove From Global Search. Save and Close.**

5. Navigate to the Global Search Index Tool.

6. Select the **Clean Search Database** button from the Search Server subsection at the bottom of the page.

You may need to log out and log back into the application for changes to be reflected in TeamConnect.

Individual items can be removed from Global Search by adjusting the Privacy setting in **Security**. To do so, select the **Security** tab on the record, click edit, and change the radio button to **Private.**

Private items that have been indexed will still be searched, but will be shown as "Secured" to users without access to those items.

1.2.3   How do I omit custom fields from Global Search?

Omitting Custom Fields from Global and Custom Search

Custom fields can be excluded from TeamConnect global search and custom search if desired. Omission of custom fields may be helpful for administrators seeking to clarify search results or utilize some custom fields as hidden fields.

1. Click **Setup** from the upper-right corner of TeamConnect.

2. From the **Go to...** dropdown menu, select Object Definition.

3. Select the desired object.

4. Click the **Custom Fields** link to view the custom fields associated with the object.

5. Click the check-box next to the field you would like to omit from search and select **Edit.**

6. Change the dropdown menus for Exclude from Custom Search and Exclude from Global Search to **No.**

7. Save and close. *__Note:__ Users must re-index the record type after these steps for the changes to be reflected in global search.*

Omitting Custom Fields from Search

1.3   Search Modifiers

TeamConnect's search feature allows the following search modifiers to improve results. Refer to the table below for examples and details.

Note: *Boolean operators (AND, OR, NOT) must be written in all caps.*

Important: *Utilize the quotation marks around separate words or phrases for best results. Multiple words without the quotation marks present will default to the **OR** operator described below.*

Search Modifier	Details	Examples
AND	The **AND** operator matches search items where both terms exist anywhere within the object, such as the contact name, memo text, or company name. The **&&** expression can also be used in place of **AND**.	"Johnson" AND "LegalCorp" "Accrual" AND "January" "Bowie" && "Harvey Smith"
OR	The **OR** operator links two terms and finds a matching	"LegalCorp Holdings" OR "LegalCore"

Search Modifier	Details	Examples
	document if either of the terms exist in a document. The **||** expression can also be used in place of **OR**.	"Johnson Roger" || "Roger Johnson"
Proximity	The proximity operator (~#) allows users to find words within a given range of each other. After entering a phrase, enter a number to find words within that specific distance.	"invoice Canada"~10 (finds results where the words 'invoice' and 'Canada' are within 10 words of each other)
Fuzzy	Fuzzy searches provide users with the ability to find words similar in spelling to a given term. This modifier is accessed by appending the ~ symbol to the end of a single search term.	Rodgers~
Wildcard	Wildcard searches look for words that match the search input with variance in a selected character. Replace a character with * or ? in a single word to return results matching all input besides the Wildcard. The ? looks for a single letter replacement. The * looks for multiple characters. Wildcard does not function for multiple terms.	To search for: beat or best — be?t John, Johns, Johnson — John* rouge or range — r*ge

Note: Modifiers are able to be grouped for more precise search results. Use parentheses to separate phrases with different modifiers.

For example:

(Johnson OR Roger) AND YonderCorp

Note: Lucene has the following words filtered out of searches:

"a", "an", "and", "are", "as", "at", "be", "but", "by",

"for", "if", "in", "into", "is", "it",

"no", "not", "of", "on", "or", "such",

"that", "the", "their", "then", "there", "these",

"they", "this", "to", "was", "will", "with"

1.4 Global Search Index Tool Help

The Global Search Index Tool is utilized to update Global Search after objects have been enabled or disabled and clear search server information. The indexing must be completed in full after installation for global search to function. If you have installed TeamConnect 4.1+ and do not see the index tool under the Tools subsection of the **All** tab, see Adding Index Tool to Tab below.

Note: Users do not need to use the index tool after making updates to an object that is already enabled. Global search will automatically incorporate these changes as per the Index Frequency time displayed on the home screen.

The Global Search Index Tool home screen can be accessed by clicking or hovering over the **Tools** tab from the navigation bar and selecting **Global Search Index Tool** from the Tools subsection.

Adding Index Tool to Tab

After installation, the Global Search Index Tool may not be immediately accessible via the Tools subsection. Enabling the tool and creating the initial index can be accomplished as follows:

1. Navigate to the **Groups** page.

2. Click the group you would like to use the index tool.

3. Click the **Tool Rights** link.

4. Click the **Edit** button. Check the boxes for the Global Search Index Tool.

5. You may need to enable Export Design Changes and Import Design Changes to utilize the Configuration Transfer Utility (CTU). More information on the CTU can be found on the Working with Configuration Transfer Utility page.

6. **Save and close.**

You can now use the Global Search Index Tool. Select it from the All tab and run the initial index as described below in **Indexing Objects**.

In preliminary testing, indexing took roughly one hour per 4GB.

Indexing Objects

To index objects, select the check-box next to the object and click **Index Selected.** While the object is indexing, the **Stop All Indexing** and **Refresh Statuses** button will appear. Refresh the statuses to observe how the indexing is progressing. The index tool page will automatically refresh after all indexing is complete but not between objects. Users may also index all objects by clicking the check-box next to **Object Name**.

Once an item has begun to be re-indexed, the existing index will be dropped. Therefore, if you stop the re-indexing while it is still in progress, there will be no indexed search for that object. However, if you are re-indexing three objects, for example, and you stop the index midway through object two, the first object will be updated, the second will have no index, and the third object will remain indexed but not updated. Likewise, records added during indexing will be indexed after the completion of the initial indexing.

More detail can be found on the **Identifying Parts of the Index Tool Screen** help page.

Users upgrading Elasticsearch for TeamConnect 5.1 will need to re-index their instance after completing their upgrade.

Note: Secured or 'private' matters and objects will not be searchable. However, if these items are indexed, related unsecured records will appear in search results upon search of the matter name.

1.4.1 Identifying Parts of the Index Tool

Details on the Global Search Index Tool home screen can be found below.

Screen Identifier	Usage
Object Name	The Object Name field lists all Objects available for Global Search. The **Name in Plural** field of newly created objects will show here after creating the object and refreshing the page.
Started	The Started time displays the start time of the most recent re-indexing.
Finished	The Finished time displays the finish time of the most recent re-indexing.
Status	The Status tab displays one of three statuses: **Indexed**: The data for this object is present and indexed on the search server. **Not Indexed**: This object is enabled for search but has no data on the search server. Click the check-box next to the object and click **Index Selected** to move data to the server. **Disabled**: This object does not return results or store data on the search server. See Disabling Objects from Global Search.
UUID	The UUID is your unique identifier for global search. Reference this number in any support issues you may have.
Index Frequency (seconds)	The Index Frequency shows how often TeamConnect automatically checks for updates and modifications to existing, enabled objects and incorporates these changes into the global search. This value is set during the initial configuration.
Test connection to search server	The test connection button allows users to ensure that a link between the TeamConnect instance and search server exists.
Clean unused data from	**Clean unused data from search server** removes leftover data from the search server from objects that you have recently disabled. Any item that has been previously indexed must be cleared after being disabled. See Disabling Objects from Global Search.

Screen Identifier	Usage
search server	
Delete all search server information	The **Delete all search server information** button ("Drop Index") will remove search data for all objects on the search server. Objects must be re-indexed if this button is pressed for search to return any results.

1.4.2   Supported Elasticsearch Documents

Documents and Global Search

Users with Global Search enabled are able to search on both indexed documents, their metadata, and the contents of their attachments. Documents present on the TeamConnect instance but not indexed will not deliver full-text search capabilities. *Note: For more information on indexing, see Global Search Index Tool Help.*

Extensions

When using Global Search, supported attachments that have matching metadata keywords or matching content will be returned. The following attachment extensions are supported:

- HTML/XHTML
- XML
- Email files (.eml, .msg)
- Microsoft Office File Formats (.xls, .xlsx, .doc, .docx, .pptx, .one, .pub, .mdb)
- PDF
- RTF, TXT
- ODF
- EPUB
- JAR

Documents and File Size

Admins are able to configure the maximum size for documents to be indexed as well as searched. If a document that exceeds the preset value (e.g., a 100MB document with a 50MB maximum size

limit), full-text searching will not be available. However, the document keywords and metadata will still return results (e.g., document title, author, etc.).

If documents are indexed in a batch and only one exceeds the maximum value, all documents within the size parameters will be uploaded and the larger file will not. There will not be an error message on the screen; however, users with logging turned on will be able to see the failed document in their logs.

1.5   Search Admin Settings

Search results and functionality can be fine-tuned by system administrators. The Search Results admin settings can be found by clicking the **Admin** tab (or **Admin Settings** from the **All** tab) and selecting **Search Results** from the left navigation panel on the Admin Settings page.

Admin Settings for Search

Admin settings provides the following editable fields:

Enable Custom Search

Disable Global Search

Default option in Global Search: Select the default search function from either All categories or a desired subcategory.

Minimum characters in Global Search: Enter the minimum number of characters required for a search. It is recommended to enter '3' or more in this field.

Records per result page: Enter the number of records per results page.

Card columns in contact card view: Set the number of columns for contact card formatting.

Maximum Search results: Set the maximum search results.

Maximum Search time (seconds): Set the maximum time search will continue going through records.

Maximum document size(MB) for search: Set the maximum document size for documents to be included in search and index.

The options below can be toggled via checkbox:

Show number of secure results in Global Search results: Shows the number of secured (or hidden) matching results for a search.

Automatically populate Contact field if search returns one result

Automatically populate Project field if search returns one result

Enable search across All Projects for Project field

Custom search will respect Custom Field rights

*Bold fields are required.

1.6   Searching and Version Control

The following details pertain to how new versions of documents and invoices are searched on and returned in TeamConnect.

Document Version:
A new version of the document will be added each time the document is checked out, and then checked back in.

With Custom searches you can find only the most recent document that has been checked in. If you go into this document you will be able to see the versions on the documents in the the versions tab in Documents.

With ElasticSearch (global search) the process works the same; you will only see the most recent version of the documents in the search results.

Invoice Version:
A new invoice version is only created when the previous invoice is rejected, and a new invoice with the same name is submitted to the client. This can also be done through the UI by creating a copy of the invoice that was rejected, and making sure to remove the 'Copy of' in the invoice name. In custom search you will only see the newest version of the invoice, and will not see the other invoice versions.

With ElasticSearch (global search) you will see all versions of the invoices.

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