

Saved Searches

Summation Express/Pro

- Saved Search

You can save any advanced search that you design in the Advanced Search Builder. All saved searches are stored in the *Searches* tab of the *Case Explorer*. You can use saved searches to run past searches again or to share your search with a group of users.

1. Log in as a user with *Run Search* privileges.
2. Click the *Case Review* button  in the *Case List* panel next to the case.
3. In *Case Review*, ensure that the *Case Explorer*, and the *Item List* panel are showing.
4. In the *Case Explorer*, default scope selection includes all evidence items in the case. Using the check boxes, uncheck items from both the *Explore* and *Tags* tabs to exclude them from the scope of the search. These scope items include:
 - Document Groups
 - Production Sets
 - Transcripts
 - Notes
 - Exhibits
 - Labels
 - Issues
 - Categories
5. In the *Facets* tab of the *Case Explorer*, you can select any combination of *Facets* to apply to the current search scope.
6. Click the **Apply** check mark button in the top of the *Case Explorer*. This applies the currently selected scope and any selected *Facets* to the *Item List*, allowing search and review on the resulting subset. The scope of a search is saved along with the query. This *Facet* will persist through searches until you clear it. Scopes may be changed and searches re-run by use of the *Apply* button. After updating a *Facet* or scope item, you may click the **Apply** button to update the scope and re-run any search that has not been cleared out by use of the *Clear Search* button in the *Search Options* menu.

Summation iBlaze

- Saved Search

- Saving an Integrated Search

1. Click anywhere within the **Case Explorer** to bring it into focus.
2. Check the components you want to search.
3. Type your search term or phrase in the **Search** box.
4. Right-click the **Searches** folder in the **Case Tools** portion of the **Case Explorer**.
5. Select **Save Integrated Search**.
6. If you want to change the description of your search, type a new description in the **Description** box.
7. By default, the components you selected in step two will be remembered when you retrieve the search. If you do not want to save the selected components along with the search term or phrase, de-select **Save With Checked Folders**.
8. Click **OK**.

- Saving a Document Group Search

1. Click anywhere within the **Case Explorer** to bring it into focus.
2. Right-click the **Searches** folder in the **Case Tools** portion of the **Case Explorer**.
3. Select **Set up a Document Group**.
4. From the **Field** box, select the field you want to search. For example, **Doctypes**.
5. In the **Field Value** box, type the value you want to search for.
6. If you want to give your search another description, type a new description in the **Document Group Description** box.
7. The **Document Group Definition** is actually the search string AD Summation iBlaze will use to perform your search. You can modify it if necessary keeping in mind that you are modifying your search.
8. Click **OK**.

- Running a Saved Search

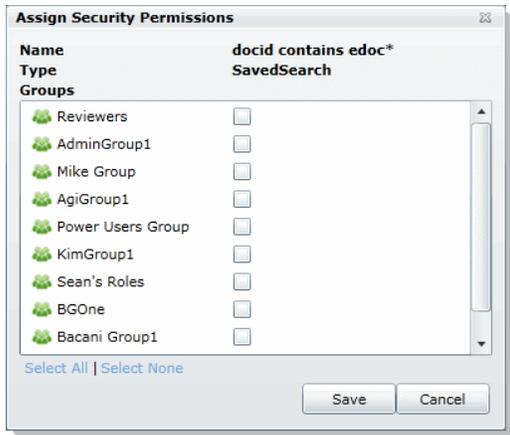
1. Click anywhere within the **Case Explorer** to bring it into focus.
2. Click the plus sign (+) next to the **Searches** folder in the **Case Tools** section of the **Case Explorer** to expand the folder and display

7. Click the **Search Options** button in the *Item List* panel and select **Advanced Search**.
8. Enter a *Name* for the search.
9. Enter criteria for the search.
10. Click **Save**.

- **Sharing a Saved Search**

You can share your saved searches with other groups of users. To share a search, you need to have the Manage Searches permission.

1. Log in as a user with Manage Searches permissions.
2. Click the *Case Review* button  in the *Case List* panel next to the case.
3. In *Case Review*, ensure the *Case Explorer* is showing.
4. Click on the **Searches** tab.
5. Expand My Searches.
6. Right-click the search and select **Manage Permissions**.



7. Check the groups with which you want to share the search.
8. Click **Save**.

- **Importing Index Search Terms**

You can import a list of search terms. This lets you reuse a list of search terms that you saved from previous searches, or that you saved for documentation purposes.

1. In *Case Review*, in the *Item List* panel, click **Search Options > Advanced Search**.
2. Click **Import** to import a set of search terms.
3. Select the text file that you previously saved.
4. Click **Open**.

your saved searches.

3. Double-click the search you want to run.

- **Sharing a Saved Search**

When you save a search it is saved in your private **Searches** folder in the **Case Tools** section of the **Case Explorer** and is only accessible by you. If you want to share that search with other users you will need to create a **Searches** folder in the top section of the **Case Explorer** and drag the saved search into that folder.

4. Right-click the case name at the top of the **Case Explorer**.
5. From the menu, select **Create New and Folder**.
6. From the **Folder Type** box, select **Saved Searches Folder**.
7. In the **Folder Name** box, type the name that you want to use for your new folder or leave the default **Searches**.
8. Click **OK**.
9. Click the plus sign next to the **Searches** folder in the **Case Tools** to expand it and display the searches
10. Click the search you want to share and drag it to the new searches folder. Repeat for each search you want to share.