MetaJure

User Guide

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MetaJure User Guide

Welcome to MetaJure, the Smart Document Management System created by lawyers for lawyers. MetaJure gives you the power to find, access, and preserve all your documents and information – without any of the extra steps required by traditional document management systems.

1. MetaJure Overview

What is MetaJure?

MetaJure is a Smart Document Management System (DMS) that automatically collects, stores and analyzes all of your and your firm's or legal department's documents and emails and then makes them retrievable through a simple, Google-like search, even from mobile devices. For a quick overview of MetaJure, watch our introductory video at http://metajure.com/introducing-metajure/.

How do I start using MetaJure?

MetaJure automates the two basic jobs of any document management system: ***storing*** and ***finding*** your work product and knowledge.

> **Storing is automated.** Once installed on your PC, the MetaSync agent (we also call it the "MJ Robot") automatically works in the background to collect, store and analyze all of your documents and email.

> **Retrieval is simple and powerful.** To find and retrieve a document or email on your PC or elsewhere around your firm or department, you start by launching the MetaJure Home Page, either by clicking on the MJ button either in your Outlook/Word/Excel toolbar, or on the MJ Robot on your computer's taskbar. (See examples of both below.)

<div align="center">

Word/Outlook/Excel Toolbar   Windows Taskbar

</div>
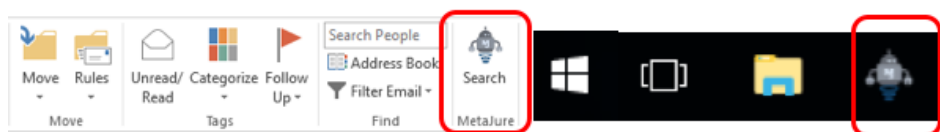
How do I find documents and information with MetaJure?

After launching the MetaJure Home Page, type the key words related to what you are looking for into the retrieval bar (e.g., **john jones promissory note**) and then click [FIND] or hit ENTER. The MJ Robot quickly retrieves all of the relevant documents, emails and folders you have permission to view.
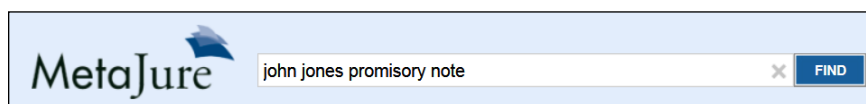
For more about searching strategies, tips and tricks, and advanced use cases, *see* **Power Tools and Tips**.

What is MetaJure searching when I type in a retrieval request?

The MJ Robot searches all of the documents, emails, and email attachments on your computer, as well as those of your colleagues who have chosen to share their documents and/or emails with you. If your firm or legal department has central databases, file shares, network drives or legacy document management systems and has connected them to MetaJure, the MJ Robot will also examine those locations for responsive documents that you have been given permission to see. The MJ Robot finds all file types, including Microsoft Office (Word, PowerPoint, Excel, etc.), PDFs, email and even image-only files.

How does MetaJure retrieval work?

A search for a single term (e.g., **license**) will find all documents, emails and folders containing that term. A search for multiple terms (e.g., **software license**) will find documents, emails and folders containing all of those terms (effectively placing an AND between the terms). A search for a phrase or collection of words in quotations (e.g., **"software license"**) will only find documents, emails and folders that contain that exact phrase, and will not find documents, emails or folders that contain even slight variants of that phrase (e.g., "software distribution license"). MetaJure also supports the full array of advanced Boolean queries including location searches, proximity searches, wild card searches, **OR** and **NOT** searches, etc. For advanced retrieval techniques and tips, *see* **Power Tools and Tips**.

Does capitalization of my query terms matter?

The MJ Robot will find all of documents, emails and folders with your query terms regardless of capitalization. Exceptions are for the Boolean operators **AND**, **OR** and **NOT**. If any of those words are in ALL CAPS, they become Boolean operators (*see* **Can I use the Boolean Operators "AND," "OR" and "NOT" in my queries?**).

Can I search within a given named folder, and by title or author?

To limit a search to the content of folders with a given name, use **documentLocation:[folder name]** where [folder name] is the name of the folder in which you want the search to be contained (e.g., **documentLocation:Forms**). For example, to run a search for "NDA" in just folders named "Forms" the query would be **documentLocation:forms NDA**. Note, the "L" needs to be capitalized. A search for a location involving multiple words such as a search for all documents containing "2008" in folders named "litigation status reports" would look as follows: **documentLocation:"litigation status reports" 2008**. To search for a particular file name or email subject line, use **documentTitle:[name of document or email subject]** in the same fashion as described for a document location focused search. For example, a search for a document named "Waters v Williams Status Report" would be **documentTitle:"waters v williams status report".** To search for a document or email by a author, use **Author:[name of author]**. Note, the "A" in "Author" needs to be capitalized. An example of a search for an NDA drafted by John Smith would be **Author:"john smith" nda**.

Does it matter whether the terms I'm using are singular or plural?

Yes, as the MJ Robot searches for the exact term or terms you type into the query box, it considers the singular and plural forms of a word to be two different searches. For example, searching for **indemnification form<u>s</u>** would not find a folder or document entitled "indemnification form." Depending on what you are looking for, you can either search for one of the choices, both possibilities (by typing **indemnification form** or **indemnification forms**), or use the ***** symbol (**indemnification form***) to find all variants of the word "form," including "forms."

What am I seeing in the MetaJure results page?

You are seeing all of the documents, emails and folders you have permission to see that are responsive to your retrieval query. Any folders with names that are responsive to your query will appear at the top of your results. To see the contents of a given responsive folder, just click on that folder and MetaJure will show you all of the documents and email in that folder, even those that do not contain in their titles or text the terms in your retrieval query. To return to the results screen from viewing the contents of a folder, click on the Return to Search button in the upper right hand corner of the screen. Below the responsive folders (if there are any), are the responsive documents and emails. The most responsive documents and emails will be at the top. If multiple documents are equally responsive (for example, MetaJure returns various drafts of a given document), the most recent document appears first and the others follow in chronological order.

Can I filter my results?

Yes, you can filter your results by: (a) the location in which the responsive documents were found, (b) file type (email, Word, PowerPoint, PDF, etc.), and (c) date. Each filter can be used alone or in combination with any or all of the other filters (e.g., you could filter for only Word documents that were created in the past year). For detailed guidance on using the MetaJure filters, *see* **Using MetaJure Filters**.

Can I preview a result?

Click on any result and a preview of that document or email will appear in the right pane of your results screen. The terms responsive to your request will be highlighted in <mark>yellow</mark>. If the document does not fit into the preview pane, a scrollbar will appear to the right of the preview pane that will enable you to scroll through all of the text of the selected document. If the document is an image-only file (for example, a JPEG file or an image-only PDF), you will not be able to preview the result without opening the document. For PowerPoint and Excel files, the preview will only show the text contained in those files and not the graphics. To preview another result, just click on that result.

Can I open a document or email shown in the results screen?

Yes, simply click on a document or email in the results screen and a preview will appear in the right pane, along with an OPEN button. To open the document, click on OPEN. Depending on your PC's security settings, you might get a prompt asking if you really want to open that document or email and your computer might run a security scan before opening it.

If I open a document from the results screen, what am I opening?

If the document or email comes from your PC or your firm's or department's files shares, SharePoint sites or the like, MetaJure will open the original document or email from its original location. If the document or email was shared with you by one of your colleagues from their PC, MetaJure opens a **COPY** of your colleague's document or email.

If I don't know how to spell the name of a client or adverse party, what can I do?

If you can't recall how to spell the name of a client or adversarial party, you can use either "wild cards" or "fuzzy" searching to help you find what you are looking for. For example, if you are looking for documents or folders related to your client Keith Brintzenhofe but can't remember the spelling of his last name, you can search for **Keith Brint*** (where the * serves as a wild card). This query will find all variants of words or last names that begin with "brint" – for example Brintsenhoff, Britsenhoffe, Brintzenhoffe and, of course, the correct spelling of Brintzenhofe. If you are not sure how to spell even the first three letters of the name, you could run a "fuzzy" search using the **~**. You can think of a "fuzzy" search as a "sounds like" search. For example, in the previous example, you could run a search for

Brentzinhoff~. This search will return results with words that have spellings close to Brentsenhoff – for example, Brintzenhofe, Brentsonhoff, Brandsonhofe, etc. Given that the MJ Robot is looking for a lot of variants when running a "fuzzy" search like **Brentsenhoff~**, response time will likely be longer than other types of searches.

If I get too many results, what can I do?

If you get more results than you anticipated, there are a number of things you can do. First, consider adding additional, relevant terms to your retrieval query. For example, if you are looking for the Jones Release of Lien and had searched for **Jones release**, you might search for **Jones release of lien**. You can also use filters to help improve your results. For example, you could filter for the file type you believe the document to be in (for example, PDF), the location in which the document was found (for example, in the files of the colleague who likely handled the transaction), or a given date range in which you believe the document was created.

If I get too few results, what can I do?

If you get fewer results than you anticipated, there are a number of things you can do. First, make sure that you aren't inadvertently applying extra filters to your search. If you have applied filters in a previous search (such as a given **Location, File Type** or **Date**), those filters will remain in place when you run your new query. To clear all filters, click on the `Clear Filters` button next to Narrow By in the left hand filter pane. To clear a single filter, just click on the highest-level category for that filter (i.e., "**Everything,**" "**All File Types**" or "**Anytime**"). (For more information, *see* **How do I clear the filters?**) Next, consider dropping some of the search terms from your retrieval query. For example, if you are looking for the Jones Release of Lien and had searched for **Jones release of lien King County**, consider removing the terms King County and just searching for **Jones release of lien** or **Jones release**. You might also consider using an alternative search term or terms, such as **Jones release of claim**. If a given type of legal document can go by different names (e.g., NDA or Confidentiality Agreement) consider searching for the alternative name, as well. If you think you may have misspelled a client or adversary's name, you might use wild card or fuzzy searches for that name (for more information, *see* **If I don't know how to spell a client or adverse party's name, what can I do?**).
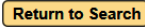
How can I use the file path shown under each result?

Under each document or email shown in your query results is a file path showing the location where that document or email was found. For example in the below result, you can see from the file path that the "**John Jones Promissory Note** – Signed" is a document that was shared with you by your colleague **Parker Smith** and that it was found in her folder entitled **House Project**. As you can see from the file path (sometimes called a "cookie crumb" trail), Parker's **House Project** folder is a subfolder of her **John Jones** folder, which is a folder in her PC's **My Documents** folder**.**

Each location in a file path (i.e., the name between a set of **> >**'s) is a clickable link. When you click on a given link, MetaJure will show you all of the documents and folders in the named location, regardless of whether those documents and folders are responsive to your query. For example, if you clicked on **House Project** in the above result, MetaJure would take you to a screen showing you all of the documents in Parker Smith's **House Project** folder. Seeing all of the documents in this folder might show you, for example, that there was a Residential Mortgage Agreement in connection with the Promissory Note, as well as a Home Construction Agreement. If you wanted to know what other projects Parker Smith has or had for John Jones, clicking on **John Jones** in the file path will bring up all of

the other subfolders Parker Smith has under her **John Jones** folder that she has elected to share with you. Once presented with a list of Parker's subfolders in her John Jones folder, you can navigate to the content of any subfolder simply by clicking on the one you are interested in. To return to your original search results click on the `Return to Search` button in the upper right hand corner of the screen.

What are the results that are displayed when I first launch MetaJure?

When you launch MetaJure, you will see a list of all of the documents and emails from your PC as well as around your firm or department that you have permission to see, arranged chronologically. Click on any of the results in the list to preview a particular document or email. To see what is new from a certain person, go to the `Shared PCs` filter and click on that person's name. You will then see a chronological listing of that person's most recent documents and email that they have elected to share with you. To see what is new at a particular firm or department storage location (for example, your central file shares), go to the **Location** filter and click on the central location you are interested in. You will then see a chronological listing of the most recent documents from that firm or legal department location that you have permission to see. To see just a certain type of new files (e.g., PowerPoint presentations), you can apply any of the **File Type** filters.

Does everyone see the same results to a MetaJure retrieval query?

No, MetaJure retrieval results vary based on each person's permissions. Your results will always include all responsive documents and emails on your computer (including those in your Inbox, Sent Mail, Junk mail and any Personal folders), as well as the responsive documents and emails shared with you by your colleagues or which reside on your firm's or department's central locations. Since it is unlikely that you will have shared all of your documents and emails with your colleagues (or they with you), it is unlikely that MetaJure will return exactly the same documents and emails in a similar search. Also, search results will differ because users typically have different access rights to documents stored on central locations.

Can others see what is on my PC and in my email through MetaJure?

No. Unless you have chosen to share the contents of your files/folders with your colleagues by turning on the **Sharing** feature, no one else will see your documents or emails. If you have turned on **Sharing**, then only those colleagues you have selected will see your documents or emails, and then only from the files/folders you have designated for sharing. For a deeper understanding of Sharing and how Sharing permissions are set, *see* **Sharing My Work Product**.

What happens when I delete a document or folder on my PC?

If you delete a document, email or folder from your PC, the standard configuration is that the MJ Robot will delete it from MetaJure during the next nightly update. Once deleted, that document, email or folder and its contents will no longer be available to you or the colleagues with whom you may have shared it (unless you had an additional copy stored elsewhere on your PC or in your email, or if one of your colleagues made a copy of that document, file or email prior to your deleting it). However, MetaJure can be also set to preserve PC documents and email on the MetaJure server for a period of time after PC deletion to meet information retention requirements.

How does MetaJure handle duplicates of the same document?

If the MJ Robot determines that there is more than one copy of a given document around your firm or department that is responsive to your retrieval query, MetaJure will show that document once in the results screen, along with the number of copies the MJ Robot found that you have permission to see (*see* the below example). If you were to click on the **1 duplicate** in the result below, it would open a

window that shows you all of the locations that you have permission to see in which a copy of that document was found. "Duplicates" in MetaJure parlance refers to exact copies of the same document, which means an exact character match. If even a word is changed, MetaJure does not see the document as a "Duplicate."

How do I launch a new retrieval query or return to the MetaJure Home Page?

To quickly launch a new retrieval request, simply click on the greyed-out **"X"** at the end of the Search bar. This will clear your current request and enable you to enter a new one. If you have applied filters such as a given **Location, File Type** or **Date**, those filters will remain in place. To return to the MetaJure Home Page and clear all filters as well as your search terms, simply click on the firm's logo in the upper left corner.

Can I use MetaJure on my mobile devices?

Yes, you can search for, view and retrieve your documents and email from any smartphone or tablet that has a web browser and Internet connectivity. You will need to work with your IT support staff or your MetaJure reseller to set up your mobile device so that it can remotely access your MetaJure server.

Can I use MetaJure on remote storage systems like Dropbox?

Yes, MetaJure can capture and make searchable documents you link and upload from your PC to cloud-based storage systems like Dropbox or SkyDrive. The MJ Robot sees these data storage systems as just another data source on your computer and smartly copies them to the MetaJure server.

2.   Using MetaJure Filters

What is a filter?

You can use filters to narrow your search. MetaJure has three filters you can apply, alone or in combination: (i) the **Location** in which the document was found; (ii) the **File Type**; and (iii) the **Date** or **Date Range.** You can also determine whether your results are sorted by **Relevance**, or chronologically by the **Newest to Oldest date** or **Oldest to Newest** date on which the document was created.

How do I filter for "Location?"

At the top left side of the results screen below **"Narrow By,"** you will see the various **Locations** from which the MJ Robot found responsive documents, emails and folders. To the right of each listed location is the number of responsive documents and emails found at that location. By clicking on a location, you apply a "filter" that enables you to see only the responsive documents, emails and folders from the selected location. For example, if you are looking for a document, email or folder that you know is on your personal computer, click on **My PC** under **Location** and your query results will show only documents, emails and folders from your PC. To see just the responsive information that your colleagues have shared with you, click on **Shared PCs** . To see a list of your colleagues who have shared documents that are responsive to your query, click on the "**+**" symbol and a list of your colleagues with responsive documents and emails will appear, along with the number of responsive documents and

emails each person has. To see just a given colleague's responsive information, click on the name of that colleague. Depending on how your firm or legal department is set up, MetaJure may also list other central storage locations such as file shares, SharePoint sites, etc. You can filter for documents found at any of these locations by clicking on their name. To return to seeing everything, click on **Everywhere** or on Clear Filters.

How do I filter for "File Type?"

Filtering for **File Type,** enables you to filter your results down to a particular file type (e.g., email, Word, PDF, PowerPoint, Excel) or just to the responsive folders. For example, if you are looking for a document that you know to be a Word file, click on **Word** under **File Type**, and the results will be filtered to show only Word documents that are responsive to your query. If your firm or legal department turns the final signed versions of client documents into PDFs, you may be able to find the signed version of a document quickly by filtering for **PDFs**. Similarly, if you are looking for the PowerPoint presentation your firm made to a potential client, simply filter by **PowerPoint**. If you want to see all documents other than emails, click on **Documents** and all emails and folders will be excluded from your results. If you want to see just the responsive folders, click on **Folders**, and your results will be filtered to show you just the responsive folders. If you click on a particular **File Type** filter and get "0 results," that means no responsive documents of that file type were found. To return to seeing all file types, click on **All File Types** or on Clear Filters.

How do I filter for "Date?"

The **Date** filter enables you to filter your results to within a particular time period. The MJ Robot automatically assigns a date to each document and email based on the date and time it was created or received. The **Date** filter can be useful in a number of ways. For example, if you want to see your firm's or legal department's most recent work product that is responsive to your query, click on **Past Week**, **Past Month**, or **Past Year** as you see fit. If you click on a particular time period and get "0 results," that means no responsive documents for that time period were found. If you know that the document or email you are looking for was created within a given time range, click on **Custom Range** and enter in the time. To return to seeing documents and email from all time periods, just click on **Anytime** or on Clear Filters.

How do I change the sorting priority from Relevancy to the date when the documents were created from Newest to Oldest or from Oldest to Newest?

MetaJure is set to automatically return results by **Relevancy.** However, the filter bar to the right of your results gives you the ability to change the sorting priority from **Relevancy** to either **Newest to Oldest** or **Oldest to Newest**. Using this filter changes the MetaJure algorithms to prioritize the date of the document. This feature can be particularly useful when you want to find the last (or first) draft of a specifically named document (e.g., **John Jones last will and testament**). It can be less useful in a general search since reducing the impact of the MetaJure relevancy algorithms can significantly reduce the relevancy of the documents returned by your query. If you set the **Order by** to either **Newest to Oldest** or **Oldest to Newest** it remains set that way for subsequent searches. To reset MetaJure to **Relevancy**, you need to do that in the **Order by:** box.

Can I use combinations of the filters?

Yes, you can apply one filter or any combination of the three filters. For example, in a given results screen, you could filter location for **My PC**, file types for **Word**, and date for **Past Year**.

How do I clear the filters?

If you run a retrieval query for a term or phrase and then filter your results by **Location**, **File Type** and/or **Date,** **those filters will remain applied for the next search you run.** To reset <u>all</u> of your filters, click on **Clear Filters** which will clear all of your filters but leave your search term applied. To quickly clear your search terms as well as your filters, click on the firm's logo in the upper left corner which will return you to the MetaJure Home Page. To clear just a single filter, click the top-level category of the filter you want cleared (i.e., **Everywhere**, **All File Types** or **Anytime**, as the case may be).

3.   Sharing My Work Product

What is "Sharing" and how do I use this feature?

MetaJure's **Sharing** feature allows you to make some or all of your own documents, emails and/or email attachments available to all of your colleagues or with just a select few, such as members of your practice group or client team. **Sharing** also enables you to share all of your documents and email with your secretary or admin or to build an ethical wall to ensure that a given person is walled off from a particular file or folder.

How do I start sharing files/folders?

By default, Sharing is turned <u>OFF</u>. To begin sharing your folders, follow these simple steps:

1. Launch MetaJure. In the top right corner of your screen, you will see a link that indicates current sharing status. (By default **Sharing is OFF**). Click on that link and it will open the MetaJure Sharing Center.
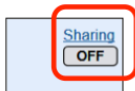

2. At the top of the MetaJure Sharing Center page, you will see three clickable links: **Shared with My Firm**, **Ethical Walls** and **Sharing Options:**

3. The **Sharing Center** automatically opens to the **Shared with My Firm** page. On the left side of the screen, you will see your email folders and PC based folders that are available for sharing. In the example below, the email account **"My PC\Email\Marty-marty@metajure.com"** has been selected and that email account's folders are then shown to the right (e.g., Inbox, Admin, Archive, etc.). To view the PC based folders available for sharing, just click on **"MyPC\Local Folders\"** underneath the "My PC\Email\Marty-marty@metajure.com" tab in the example below.
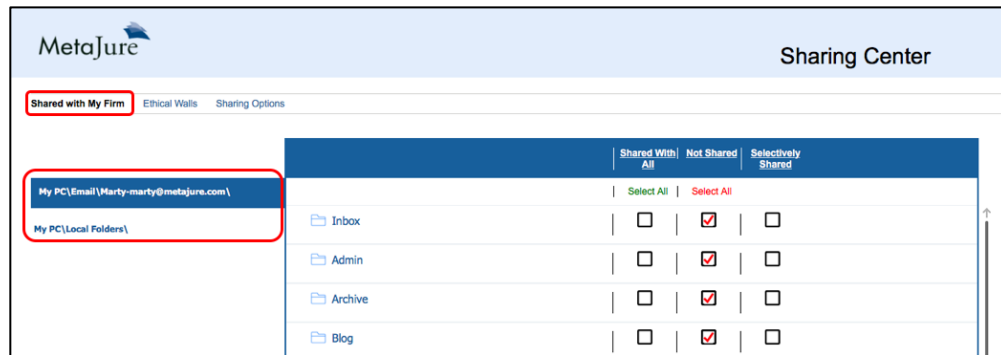
4. For each email folder and local PC folder, you have three options: **Shared with All**; **Not Shared**; and **Selectively Shared**. By default, all folders are **Not Shared** when you open the **Sharing Center**. To share a particular folder with everybody in your law firm or legal department, just click the **Shared with All** box next to that folder.. Once clicked, a green checkmark will appear in the **Shared with All** box next to that folder (the Blog folder in the below example). All items in that folder, as well as all items that you put into that folder in the future, are now available to everyone in your firm or legal department through MetaJure.
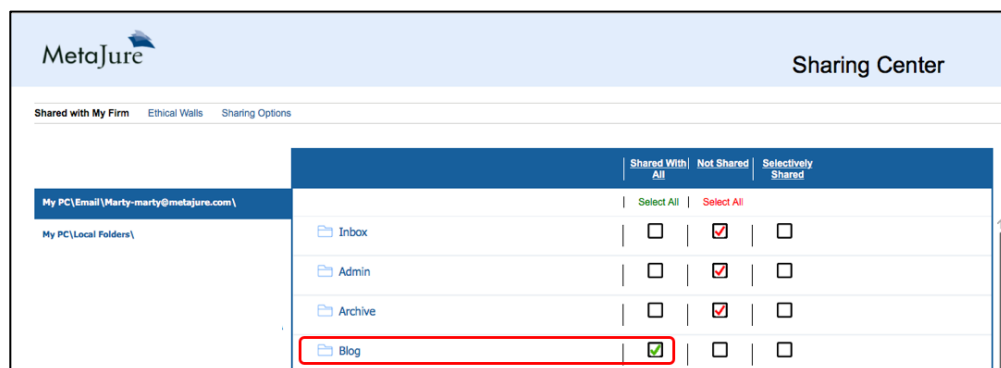
5. If you want to share a folder with a single individual or a select group, click on the **Selectively Shared** box next to the folder in question. This will cause a yellow check to appear in the Selectively Shared box next to the folder and a **Select Users** button to appear next to the checked box.
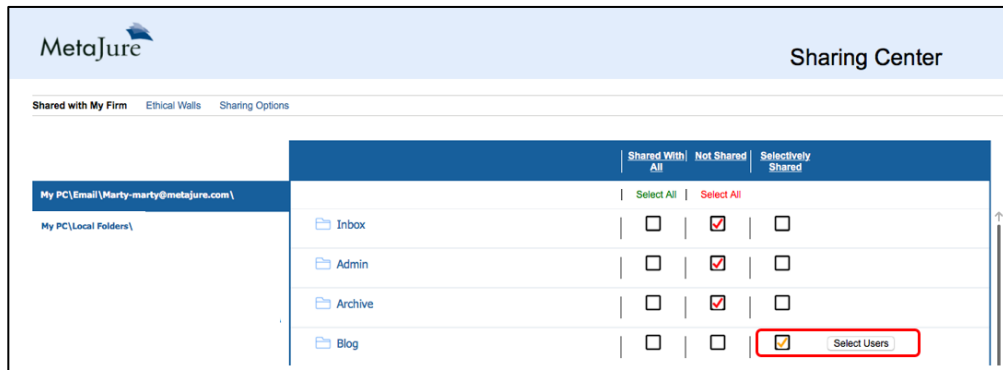
When you click on the **Select Users** button, the screen shown below will open, showing the folder for which you are setting Selective Sharing. Then, when you click on the **Add Users** button, a scrollable list of individuals from your law firm or legal department will appear so that identify the people with whom you want to share the contents of that folder.

Simply select the users with whom you want to share the contents of that folder and then click **Share** as shown in the below example.
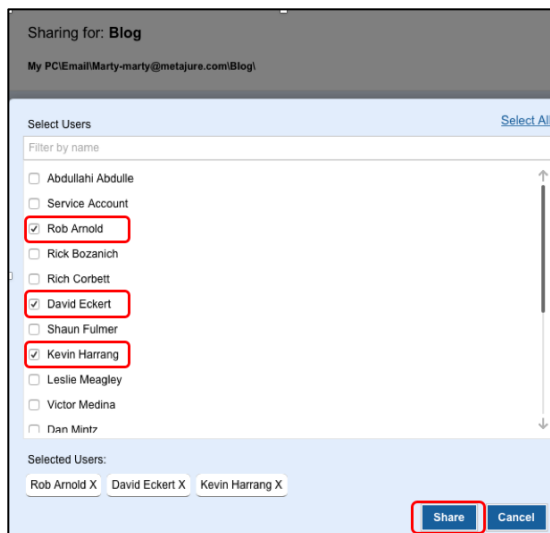
Once you have clicked **Share**, you will be taken to the screen below to confirm the users with whom that file will be shared.
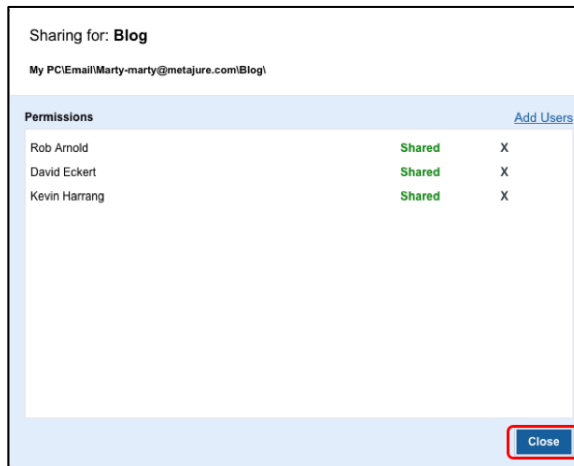
Clicking on **Close** confirms your sharing selections and then takes you back to the main **Shared with My Firm** page. You will now see next to that folder the names of the users with whom you have shared the folder. If you ever want to modify the individuals with whom that folder is shared, simply click on **Select Users** and you will be able to modify your selections using the above process.
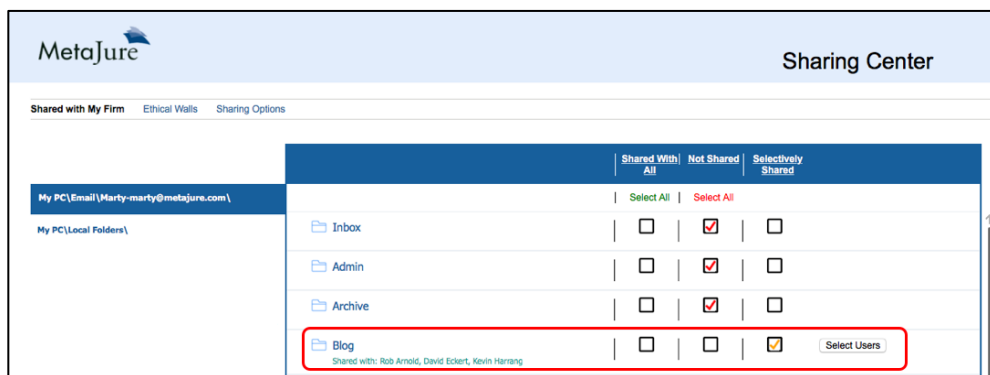
6. If you have a lot of folders and want to share the majority of them with everyone, you can click on the green **Select All** button under the **Shared with A**ll column. That will set all folders to be shared with all users. You can then simply pick the folders you don't want shared and reset them to **Not Shared** or to **Selectively Shared**. Similarly, if you ever want to change the sharing status of a given folder, just go to that folder and make the desired change. If you want to reset all of your folders to **Not Shared**, simply click the red **Select All** button under the **Not Shared** column.
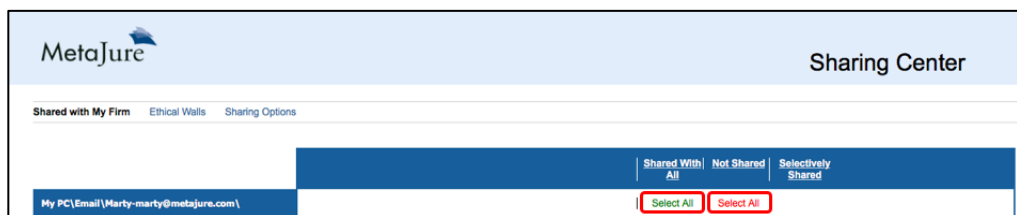
7. **Ethical walls** can be created around a given folder if a user or users need to be restricted from accessing that folder. An ethical wall is also an easy way to wall off a user from a given folder that you have otherwise shared with everyone. Ethical walls always trump any other sharing permissions that you have set. For example, if you have shared a folder with everyone, but now need to restrict a single user from that folder, you can simply create an ethical wall on that folder for that particular user. All other users will still have access to that folder. To create an ethical wall around a given folder, click on the **Ethical Walls** button on the **Sharing Center** homepage.

Clicking on the **Ethical Walls** button will cause the following screen to open. Once open, click on the **Create New Ethical Wall** button.
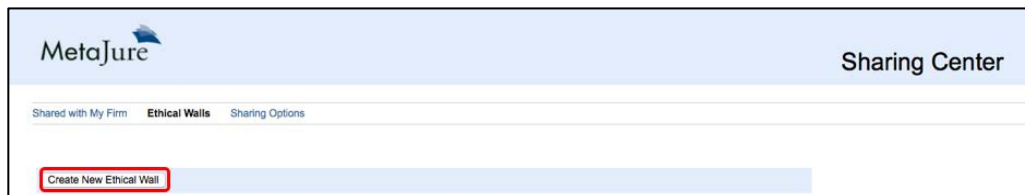
You will now be presented with the screen below. Simply select the user you want walled off from a particular folder.
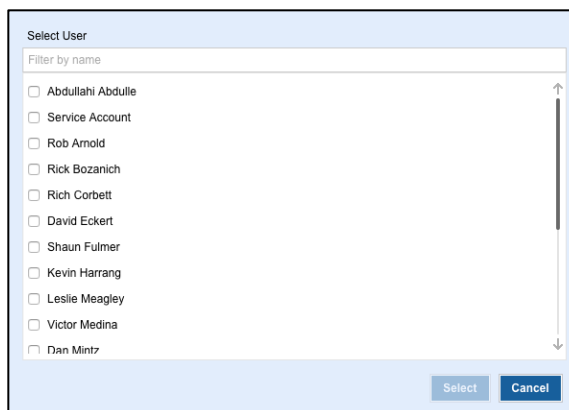
Once you have selected the user you want walled off from a particular folder, you will be returned to the **Ethical Wall** page and will see the screen below, showing a new ethical wall for the selected user. Simply click the **Add Folder** button to select the folder or folders from which that individual is to be walled off.

Select the folders you want the user walled off from (**Admin** in the below example), and then click **Select** to confirm.
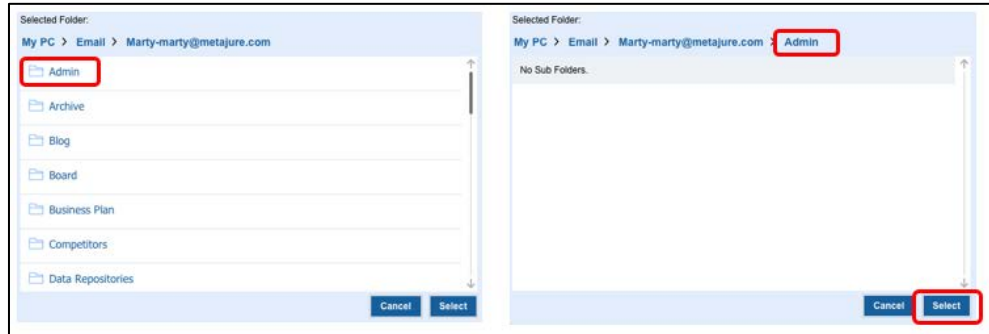
This will take you back to the **Ethical Wall** page, and show you the new ethical wall you have created. Click **Save** to confirm you want to put that ethical wall in place.

You will now be returned to the **Ethical Wall** page and will see the ethical wall that you have created. To remove that wall, simply click **Remove**. To restrict that user from another folder, simply click **Add Folder** and follow the above process. To create a new ethical wall for a different user, simply click **Create New Ethical Wall**.
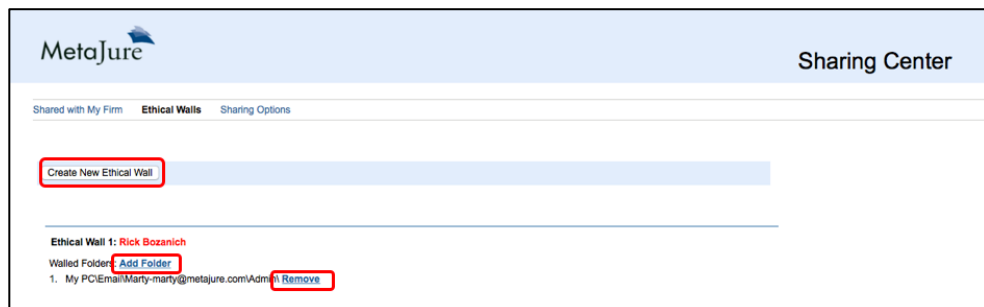
When you return to the **Shared with My Firm** page, you will now see your new ethical wall next to the folder you have selected.
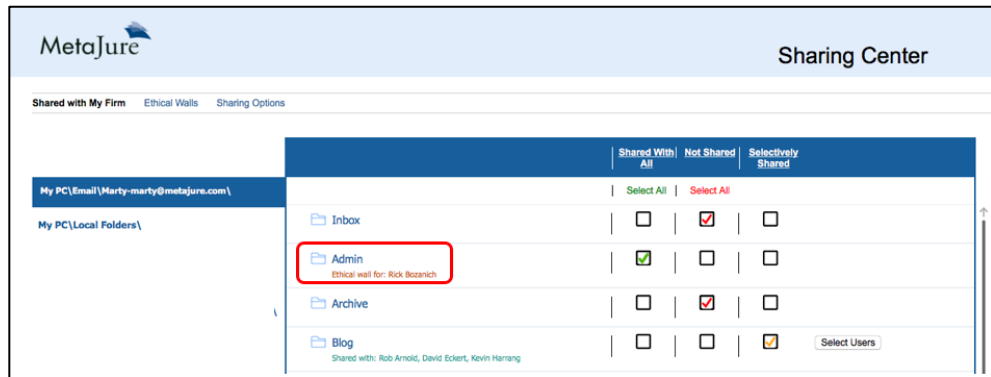
8. The **Sharing Options** button on the **Sharing Center** home page lets you set several basic sharing principles. Get to the Sharing Options by clicking on the Sharing options button.

The Sharing Options lets you set three different options: **Email Sharing Options**, **Admin Sharing Options** and **New Folder Options**.

With respect to your email, you can choose to share both the text of your email and the email's attachments, or just share the attachments to your email. Select the radio button that matches your preference. Similarly, you can choose to automatically share new subfolders of your already shared folders, or can elect to make that decision on a new folder by new folder basis. Click the radio button for the preference that is right for you. By way of example, if you have a "Forms" folder with subfolders for each type of form, clicking the **Automatically share subfolders of already shared folders** will automatically share any new subfolders you set up in your Forms folder. If you have an admin, secretary or paralegal(s) with whom you want to share all of your PC and/or email folders, click **Admin Sharing Options**. This will bring up the below screen, from which you can select your admin(s), and then click **Save**.

Once saved, your selected Admin(s) will show in the **Admin Sharing Options** section.

When you return to the **Shared with My Firm** page, your Admin sharing selection will also appear.

Once selected, all of your email folders and their contents (email text as well as attachments) and all of your PC folders will then be shared with your Admin(s). If you want to wall an Admin off from a particular folder (e.g., Personal), you can simply create an Ethical Wall on that folder for the specific Admin.

If I share, can my colleagues make changes to my documents and emails?

No. Only **copies** of your PC-based documents and emails are shared with your selected colleagues. No one else can edit or delete your documents or emails using MetaJure.

What happens if I rename a folder?

The MJ Robot runs a new analysis of your information every night.   MetaJure will reflect the new folder name the following day. Any folder you rename will inherit the same sharing characteristics as the previously named folder. If it was a shared folder, it will continue to be shared. If it was a private folder, it will remain private.

What happens when I create a new folder?

In its nightly update, the MJ Robot will discover that you have a new folder. You will then see in the upper right hand screen of the MetaJure home page below **Sharing is On**, a yellow box reminding you that you have a new folder(s) available for sharing. Clicking on this icon will take you to the Sharing Center and open the sharing screen allowing you to decide whether or not to share that new folder(s). Once you have made your decision and selected **Save Options** and have returned to the home screen, the icon will disappear. Until you take action, your new folders **will** **not** be shared, unless you have selected the **Automatically share subfolders of already shared folders** radio button in the Sharing Options section of the Sharing Center. If you have made this selection, subfolders of shared folders will automatically be shared without further action from you.

What happens when I delete a folder?

The standard configuration is that MJ Robot will delete the folder and its contents from MetaJure in its next nightly update. Once deleted, the folder will no longer be available to you or the colleagues with whom you may have shared it prior to its deletion, unless one or more of your colleagues created a copy of it or its contents prior to your deleting it. However, MetaJure can be also set to preserve PC documents and email on the MetaJure server for a period of time after PC deletion to meet information retention requirements.

What happens if a new individual joins my firm or department?

The MJ Robot will automatically pick up that a new individual has joined your firm or legal department. You will then see in the upper right screen of the MetaJure home page below Sharing is On, a yellow box reminding you that you have a new colleague(s) with whom you can share. If you have folders that you have **Shared with All** in the **Sharing Center**, these folders will automatically be shared with the new individual, with no further action on your part. If you want to share additional folders with that new individual, clicking on this new colleague's notification will take you to the **Sharing Center** allowing you to decide whether to share folders with that individual(s) using the procedures outline above. Once you have made your decision and selected **Save Options** and returned to the home screen, the icon will disappear. Until you take action, your folders **will** **not** be shared with this new individual(s) with the exception of your **Shared with All** folders.

How do I stop sharing a folder or stop sharing with a given individual?

In the top right corner of the MetaJure Home Page, you will see the link that indicates your current sharing status (**Sharing is ON**). Click on that link to open the MetaJure Sharing Center. Adjust your sharing preferences using the techniques described above.

How do I know who is sharing with me?

Launch MetaJure to go to the MetaJure Home Page. In the filters located on the left- side of the screen, click on the "**+**" sign next to ⊞ Shared PCs . This will show you a list of the people sharing their PC documents and/or emails with you, along with the total number of documents/emails being shared by each individual.

4.   Power Tools and Tips

What are some tips for finding a specific document or email?

To find a specific document or email, use the terms you expect to be found in the title or the text of the document, such as **John Jones Mortgage**, or in the subject line or text of the email, such as **lunch with John Jones**. If you get too many results without the desired document or email in the first or second results page, you can apply a filter to see just the documents or emails from the location in which you believe the document or email resides. For example, if you know Parker Smith handled the John Jones Mortgage you are looking for, use the **Location** filter to see just the results from Parker's PC. Similarly, if you are looking for the signed copy of the John Jones Mortgage and you know the final signed version is a PDF, use the **File Type** filter to see just the responsive **PDFs**. If you know the document or email was created in a particular time range, filter for that **Date**. If you found a document closely related to the one you are looking for (e.g., a John Jones Promissory Note that likely accompanied the mortgage), look at the file path of that related document to learn the name of the folder in which that related document resides. By clicking on the folder name (see "**House Project**" in the example below) you will see all documents in that folder. Maybe the document you are looking for was actually the John Jones Deed of Trust. You would find it quickly as it was filed in the "**House Project**" folder along with the John Jones Promissory Note. Of course, you can always add terms to your query to narrow your results (e.g., **John Jones Residential Mortgage**,

etc.) or broaden your search by adding an alternative title (e.g., **(John Jones Mortgage) OR (John Jones Deed of Trust) OR (John Jones Real Estate Contract)**).

John Jones Promissory Note - Signed   Dec 10, 2010
Shared PCs > Parker Smith > Local Folders > My Documents > John Jones > House Project

What are some tips for finding a class of documents?

To find a class of documents such as non-disclosure agreements, use the broad terms that most lawyers would use to name or describe that type of document (e.g., **non-disclosure agreement**) or some of the terms that would appear in almost all forms of that type of document (e.g., **confidential information disclosure recipient**). For documents that may go by different names, you can run separate searches for those names or you can use the "**OR**" operator and quotes to run a single search (e.g., **"non-disclosure agreement" OR nda OR "confidentiality agreement"**) or you could use parenthesis to run a single search (e.g., **(non-disclosure agreement) OR nda OR (confidentiality agreement)**). The difference between these two searches is that the one with quotes looks for those exact terms in the order included between the quotes (**" "**), whereas the search that includes the terms surrounded by parentheses looks for those words, but not necessarily in that order. (For example, running the search **(non-disclosure agreement)** would return a document titled "Non-Disclosure of Confidential Information Agreement," whereas running the search **"non-disclosure agreement"** would only return documents containing the exact phrase "non-disclosure agreement."

What are some tips for finding everything around a given topic?

To find all of the knowledge and experience in your firm or legal department on a particular topic, use the broad terms that most lawyers would use to describe that topic (e.g., **eminent domain**). If your topic could be described by different terms, run searches for both terms separately, or run a single search using the OR operator (e.g., **"eminent domain" OR condemnation**).

Can I use the Boolean Operators "AND," "OR" and "NOT" in my queries?

Yes, MetaJure supports the Boolean operators **AND**, **OR** and **NOT** (note: the Boolean operators must be in ALL CAPS). For example, a search for **source code license NOT exclusive** will find documents containing the words "source," "code" and "license," but will exclude documents that also contain the word "exclusive."

Can I use "wild cards" in my queries?

Yes, MetaJure supports wildcard searches. Single character wildcard searches (that is, looking for a term in which a single letter is the only variable) can be performed by using the **?** symbol. For example, to search for documents containing either the word "text" or "test," search for **te?t**. To perform a multiple character wildcard search, use the ***** symbol. For example, to search for test, tests or tester, search for **test***. The ***** symbol can also be used in the middle of a search term, but it cannot be used as the first character of a search. For example, if you are not sure how to spell the name of your client "John Johnson," you could search for **john jo*n**. This search would find all variants of names that begin with a "jo" and end with "n" (e.g., John Johnson, John Jonson, John Jonsen, etc.).

Can I run "fuzzy" searches?

Yes, MetaJure supports fuzzy searches (that is, looking for words that may be spelled closely to the term you are searching for). To find words similar in spelling to the word in your query, use the tilde **~** symbol at the end of the word. For example, to search for a term similar in spelling to "contract" use the fuzzy search **contract~**. This search will find terms like contract, content, contact, conduct, etc.

Can I run proximity searches?

Yes, MetaJure supports proximity searches (that is, searching for a set of words that must appear within a specified number of words). To find documents, emails or folders containing words that are within a particular distance from each other, use the tilde**~** symbol at the end of the quoted phrase and the range within which you want the words to occur. For example, to search for all documents containing "nondisclosure" and "agreement" within 10 words of each other, use the search **"nondisclosure agreement"~10**.

Can I "boost" a given search term or phrase?

Yes, MetaJure supports term and phrase boosting (that is, telling the MJ Robot that a word or set of words has greater importance in your query than the other words). For example, you might want to find a sample summary judgment motion in a case involving an automobile accident. Finding a motion for summary judgment that might incidentally include the mention of automobile or an accident is not what you are looking for. Rather, you want the document to contain a lot of references to automobile accident. The "boost" instruction in MetaJure is the **^** symbol followed by a number indicating how important the boosted term is in relation to the other terms. For example, if you wanted to run a query for **automobile accident summary judgment motion** and boost the phrase **"automobile accident"** to be 5 times more important than **summary judgment motion**, use the search **"automobile accident"^5 summary judgment motion**.

Can I use grouping in my searches?

Yes, MetaJure supports proximity grouping in your searches. Use parentheses to group multiple clauses into a single field. For example, to search for either "nondisclosure" or "confidential" and "agreement" use the query **(non-disclosure OR confidential) AND agreement**. This query will retrieve documents, emails and folders that have either the word "non-disclosure" or "confidential" and the word "agreement." You can also include other operators such as wild cards in a grouped search (e.g., **(non-disclosure OR confidential*) AND agreement**). This last query would find documents with "non-disclosure" and "agreement" but, it would also find documents with "confidential" and "agreement," as well as "confidentiality" and "agreement," etc. Grouping can also be helpful if there are multiple ways to spell a given term. For example, to find both "non-disclosure agreements" and "nondisclosure agreements," you could run the query **("non-disclosure" OR nondisclosure) AND agreement**.

Can I search just in a particular folder or set of folders?

Yes, MetaJure supports searching just within a designated folder or location by using the query **documentLocation:[name of desired location]** followed by the desired search term or terms. [NOTE: the "**L**" in **documentLocation:** needs to be capitalized.] For example, to find a "motion to dismiss" in a folder named "acme corporation," the query syntax would be: **documentLocation:"acme corporation" motion to dismiss**. This query would find any folders around your firm or legal department entitled "acme corporation" and then, within those folders, documents and emails that are responsive to the query "motion to dismiss." If multiple people or locations around your firm or legal department have folders for "acme corporation" with responsive results, all of the responsive documents and emails in those folders will show up in your results. You can quickly see the source of the results either by looking at the **Location** filter on the left side of the results screen (it will show you which locations have responsive folders and the number of results), or by looking at the file path breadcrumb under a given result (e.g., if the file path for a given result was **Shared PCs > John Jones > Local Folders > My Documents > Acme Corporation**, you would know that the document was found in John Jones' Acme Corporation folder). If you want to see all of your colleagues who have Acme folders with responsive results, go to the list of filters on the left side of the screen and click the "**+**" symbol next to ⊞ Shared PCs . You can also see all of the documents that reside in all of your firm's or department's folders named

Acme Corporation by running the query **documentLocation:"acme corporation"** with no accompanying search term (such as **motion to dismiss** in the previous example).

You can also use wildcards in a location search. For example, the query: **documentLocation:acme* motion to dismiss** would find documents with "motion to dismiss" in any folders around the firm or department named "acme" or variants thereof (e.g., "acme," "acme corp.," "acme corporation" or "acme inc."). You can also use the "OR" operator in a location search. In the case of a company like IBM, you might run the following query: **documentLocation:(IBM OR "International Business Machines") motion to dismiss**. This strategy also works if a client changes its name or is acquired by another company who then becomes a firm client, for example, **documentLocation:(Compaq OR HP) stock option plan**.

Can I search by document title or email subject line?

Yes, MetaJure supports searching just document titles and email subject lines by using the query **documentTitle:[title]**. [NOTE: the "**T**" in **documentTitle:** needs to be capitalized.] For example, to find all documents with the title (and emails with the subject line) of "motion for summary judgment," the query syntax would be **documentTitle:"motion for summary judgment"**. This query will find only documents with the exact phrase "motion for summary judgment" in their title and emails with that exact phrase in their subject lines. To see just responsive documents (e.g., Word, PowerPoint, Excel and PDFs) with that title, filter for **Documents**. To see just emails with that subject line, filter for **Email**. If you want to look for something other than that exact phrase in the title of the document or the subject line of an email, you can run the query **title:(motion for summary judgment)**. This will find documents and emails still containing the words "motion for summary judgment" in their titles or subject lines, but not necessarily in that order (e.g., it would also find documents entitled—and email with the subject line of—"motion for partial summary judgment"). You can also include the term or terms you want to see in the text of a document or email with that title. For example, a search for **documentTitle:(motion for summary judgment) automobile accident** would find all documents with titles and email with subject lines containing the words "motion," "for," "summary," and "judgment." The text of these documents or emails would also contain the words "automobile" and "accident." You can also run title searches using the other MetaJure syntax operators such as **AND**, **OR**, and **NOT**.

How can I use MetaJure as a supplemental conflict-checking tool?

Standard conflict checking that runs off of your billing data or matter management system can miss potential conflicts such as the fact you interviewed a potential client but never took their case, positional conflicts, and prior representations by lateral hires whose client files have not been loaded into your billing or matter management system. By having access to all of your lawyers' emails and documents, MetaJure can help you uncover these and other potential conflicts that might otherwise be missed.

Some tips to remember when running conflict-oriented searches on MetaJure include:

- The user must be logged in with "Administrative Privileges" before running a search, as they need to view all documents and emails across the firm or legal department. (*See*, **What Are Administrator Privileges?**)

- As in any search, it is best to start with a broad query, see what is returned, and narrow from there with either the MetaJure filters or by adding additional terms to your query.

- Run queries for possible alternate names or terms (e.g., **IBM OR "International Business Machines"** or **LED OR "light emitting diode,"** etc.).

- If you find a potentially interesting document or email, you might also use the file path breadcrumb trail under a search result to navigate to the folder containing the document or email. This will let you see if that folder contains other documents relevant to your conflict-oriented search, even though they may not contain your search terms.

- Running searches on an email domain (e.g., searching for **@ibm.com**) can quickly tell you if anybody at your firm or in your legal department has exchanged email with someone at the company (in this case, IBM) that might indicate a prior or current relationship with the company.

How can I use MetaJure to learn about third parties my firm or department has interacted with?

Running a query with the person or company's name is a great place to begin. Looking at the results screen for both responsive folders and documents will give you some quick insights into your firm's or legal department's interactions with that person or company. You may at times find yourself in the position where you want to know if your firm or corporation has ever interacted by email with anyone at a particular company. For example, you may want to know whether your firm has ever interacted with a person at Microsoft Corporation. Running a search on **microsoft** may turn up a lot of emails that do not help you in answering your question (e.g., an email that tells a client you will send them their draft Will in Microsoft Word). To determine if your firm has interacted with Microsoft itself, you could run a query for **@microsoft.com**. This search would turn up any emails exchanged with individuals at microsoft.com, as well as bringing back email addresses for contacts at microsoft.com that are stored in someone's contact list, etc. If you are running this search to check on possible conflicts of interest, you need to run the search with **Administrative Privileges** (*See*, **What are "Administrative Privileges?"** *Also see*, **How can I use MetaJure as a supplemental conflict-checking tool?**).

How can I use MetaJure to find my firm's or department's experience in a given area of law?

Potential new clients often ask lawyers to describe their firm's experience in a particular area of law. If the lawyer receiving the inquiry practices in areas outside the requested area, he or she may not be able to respond immediately. With MetaJure, you have the power to answer these types of inquiries quickly and easily, especially if lawyers in your firm have chosen to share their work product broadly with you. For example, to find your firm's experience in adverse possession cases, search on **adverse possession**. Few or no results may be a good indication that your firm has not handle many such cases, but you may still want to confirm this with your colleagues via an email request. If you get a host of responsive emails and documents, you can click on the "**+**" sign next to [Shared PCs] on the left side of the screen to determine which of your colleagues has responsive documents and hence most likely has relevant experience. The volume of documents can help you determine the possible depth of each individual's experience in that area. You can also click on the **Date** filter for **Past Year** (or any other time period filter) to determine how recent a given individual's experience is. The accuracy of this type of search obviously depends on how much information your colleagues have elected to share with you.

How can I use MetaJure to understand the context of a document?

In many searches, understanding the context around a given document can be as important as finding the document itself. By "context," we mean things like where in the drafting process a given document

fell (e.g., was it a first draft or the final version?), the circumstances or reasons behind changes in a document (e.g., was there an associated email explaining why the changes were made?), and whether there are other related documents of which you should be aware (e.g., was this the only document in the transaction or are there others?). You can find document context by using the following techniques. (Of course, the depth of the context around the document will depend on how much and what types of documents or emails your colleagues have shared with you via MetaJure.)

If you want to find context around the document "ABC License Agreement," run the query **abc license agreement**. MJ will bring back the most responsive documents, with the versions of that document stack ranked with the most recent at the top of the results and earlier versions arranged down the results screen. If you just want a Word document, but are seeing related emails and PowerPoint presentations, filter for just **Word** results. If your firm or legal department has the practice of creating a PDF of the final signed version of the ABC License Agreement, you can navigate to that document by filtering only for **PDFs**.

To learn the broader history around the ABC License Agreement, you can filter for **Email** and the emails for which you have permission to see that reference the ABC License Agreement or to which the agreement was attached, will then be shown in the results screen. Another useful context searching technique is to utilize the "hot-linked" folder path at the bottom of a results entry. For example, if the folder path under a version of the ABC License Agreement reads: **Shared PCs > John Jones > Local Folders > My Documents > ABC Corporation > Project Gemini**, clicking on **Project Gemini** will show you all of the documents in that folder, regardless of whether they have the term "ABC License Agreement" in them. This technique might lead to your learning there was also a Source Code Escrow Agreement that was also part of the ABC License Agreement transaction.

## How can I use MetaJure to find out what's new around my firm or legal department?

When you launch MetaJure, the home screen displays all of the recent documents from around your firm that you have access to see, stack ranked by date. To learn about the most recent documents from a particular source or location, just click on that location in the Filter Bar on the left side of the screen. If you filter for **⊞ Shared PCs**, you will see just the most recent documents and emails from your colleagues who have shared their work product with you. To see what a particular colleague has been working on that they have shared with you, click the "**+**" symbol next to **⊞ Shared PCs**, and then click on the name of that individual. You can also use the **File Types** filter to see just your firm's most recent PowerPoint presentations, Excel spreadsheets, etc.

How can I upload and search client documents using MetaJure?

MetaJure can help you quickly and easily search documents you receive from a client. If a client gives you a USB thumb drive with the documents related to their case, your first step is to transfer them to your PC (or to one of your firm's central network drives) into a newly created subfolder in your **My Documents** folder (e.g., a **Client Documents** subfolder under your folder **John Jones v. Sam Smith** folder.) In the MJ Robot's next crawl of your PC (typically during the night after you have uploaded those documents), it will index these documents and return them in your search results. If you want to search just within those documents (i.e., you don't want any other related documents populating the results screen), you can instruct MetaJure to search just within the subfolder you created for those documents (*See*, **Can I search just in a particular folder or set of folders?***).

Can I use MetaJure to export copies of documents and email to a USB thumb drive?

Yes, MetaJure supports the export of documents that are found with MetaJure. For example, if a client asks for copies of all of their files, you can run a search throughout your firm. To find all of the right files, run location-based searches **documentLocation:(client name)**. If it is possible that various lawyers may have abbreviated the client's name in their folder structure, run a search for variants of the client's name (e.g., **documentLocation:((client name 1) OR (client name 2)**). (*Also see*, **Can I search just in a particular folder or set of folders?**) When you have your results, click <u>Export Results</u> at the top of the results screen as shown in the image below.
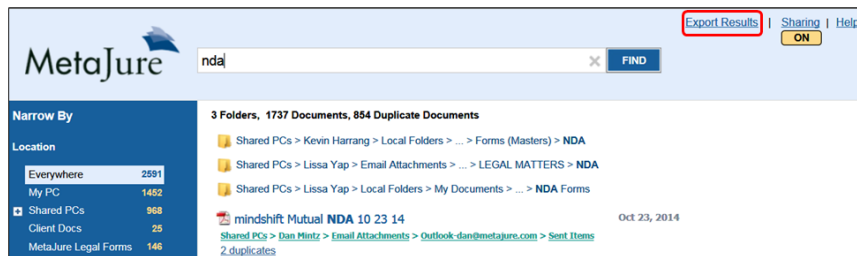
MJ will prompt you through the export process, including asking you to identify the location to which you want the documents exported. Remember that you are just exporting a copy of the documents and are not deleting the originals of the documents from their locations. When you open the folder containing the exported documents, the documents will be arranged in a manner that reflects where they came from and the folder in which they were found (e.g., whose PC they were found on and what folder or subfolder they were in). If you want to export all of your firm's documents on a matter or topic, you will need to be running the search with Administrator Privileges (*See,* **What are "Administrator Privileges?"**).

What are "Administrator Privileges?"

"Administrator Privileges" is a setting that can be turned on by your firm's network administrator. It gives the user running a search with Administrator Privileges the ability to see all documents and emails around your firm to which MetaJure has access, regardless of whether an individual lawyer or secretary has set their permissions to share documents, and regardless of the permissions that may be set on other firm document locations such as central file shares. This setting is very similar to what your network administrator can already do with central file shares and with all of your Microsoft Exchange email accounts. Running a search with Administrator Privileges can be useful or even required for certain tasks such as exporting all of a client's documents and records from around your firm, or running supplemental conflict checks. (*See* **How can I Use MetaJure as a supplemental conflict-checking tool?, How can I use MetaJure to learn about third parties my firm has interacted with?**, and **Can I use MetaJure to export copies of documents and email to a USB thumb drive?**)