GUIDE TO THE METAJURE DEMO SITE
Updated 11/3/2016

Sharing Permissions:

Sharing permissions for email and PC documents are controlled within MetaJure. By default, sharing permissions are set to OFF, so they need to be first turned ON for each user, and then enable sharing for all folders that will be shared with others at the firm.

Clicking on **Sharing** in the top right will open the Sharing Center.

> Note: The demo site can show how to set permissions for email sharing only. However, PC documents sharing can be done in the exact same way.

You will see a replication of your folder structure in Outlook.

> First, click **Sharing Options** in the top left, and you can then have the ability to select the sharing of email and attachments OR email only.

> You can also select any Admin(s) -- those who will be granted the permission to view all of your email and PC documents.

> In addition, you can uncheck the option to automatically share subfolders of already shared folders, if you wish.

Now, click on **Shared with My Firm** on the top left, and you will be able to set sharing permissions for each email folder.

By default, all folders are checked red and **Not Shared**. You can then enable sharing on a folder-by-folder basis, **Sharing with All** or **Selectively Shared**.

If you check **Selectively Shared**, then you can select specific users with whom you will open up email folders for sharing.

Search Queries:

1) Search for versions of documents. Type in: **Aspect amendment**

"Aspect" in this example is a resources company, but it is also a word that may typically show up in non-relevant documents within a search result.   MetaJure looks at the content and context of information being searched, and the search results here show that the most relevant info is related to the company, as it should be. You also see a mixture of relevant email with the documents in the search result.

Show:

Versions – The results are stack ranked by relevancy (in this case by date), with the most recent version of the amendment on top.

Note: A file naming convention that shows the version number was used when the file was saved. This is an excellent best practice, though MetaJure is ranking the versions higher based on the most recent date saved.

Duplicates – Each of the documents shown is an individually different version, since all duplicates are removed from the search result. However, you can see any duplicates by clicking on the **duplicates** link under the document or email. You will see one file with two duplicates. If you click on the **duplicates** link, you can see where the documents are located (shows the folder path), and duplication has nothing to do with file name. To be a duplicate, it has to be the same type of document and an exact character match.

Folder browsing – MetaJure captures the native metadata that surrounds each document and email. This includes the folder name that a document was saved into, and the name of an Outlook folder where an email was dragged from the inbox. Underneath each document and email is the complete folder path for the location of that information. Each folder name is a clickable link that will enable browsing of all of the folders and subfolders shown. For example, click on the **perlingiere-d** folder under the PDF document that shows up on top in order to view the contents of that folder. Or, go another level up and view the contents of the **CLOSED FILES** folder.

> Note: Only documents and emails that the user has permission to view will show up in the search results, and the folders available for browsing will only show up if the user has permission to view them.

Text preview pane – Click on any document or email and the text shows up in the text preview pane on the right. Text can be copied right out of the preview pane. The document or email can then be opened by clicking "open," which will launch in its native format.

> Note: Besides being able to search on the text of every document, another benefit of OCR is that the text preview pane can show up and be used. If the PDF were image-only, you would only see a blank area where the preview pane would normally show text.

View relevant email – Click on **Email** under **File Type** and you will see some email correspondence relating to the Aspect Amendment revision.

2a) Search for a type of document. Type in: **row**

"ROW" in this example is a Right-of-Way agreement, but it is also a word that may typically show up in non-relevant documents within a search result. As in the above example, MetaJure looks at the content and context of information being searched, and the search results here show that the most relevant info is related to that agreement, as it should be.

This search is used to show an example of finding a type of document that can be used, to avoid re-creating one from scratch.

Show:

Narrowing results – You can start by narrowing the results by typing more into the search bar: **row letter agreement** Next, you can narrow by fields on the left side bar.   Since you need a Word document that you can modify, click on **Word** under **File Type**.

Next, narrow by data location, in this case the "Clients" drive, by clicking **Clients** under **Location**

Override Relevancy Ranking -- By default, all search results are ordered by relevancy, as determined in the search algorithm. However, you can override this and organize the results by date by using the dropdown box on top of the date column. Select **Newest to Oldest** in the dropdown.

Export feature – You can export all search results (all documents and email preserved within their native structure) to a Zip file, and save to a thumb drive or other designated location. This can be done by clicking on the **Export Results** link on the top right of the page. Once clicked, go ahead and cancel the export.

2b) Search for a type of document (<u>For PC documents</u>). Type in: **NDA**
        This search is used to show another example of finding a type of document that can be used, to avoid re-creating one from scratch.

        Show:
                <u>Narrowing results</u> –Next, you can narrow by fields on the left side bar. Since you need a Word document that you can modify, click on **Word** under **File Type.**

                Next, narrow by data location; in this case under **Shared PCs** select **Vincent Kraminski.**

3) Search for a specific document. Type in an invoice #: **10126830**
        This search can be used to show an example of locating a specific document by the text in the body of the document, when there isn't metadata from the file name or folder name to inform the search. This invoice was scanned and then OCR'd in MetaJure. Without the OCR to make the invoice text searchable, this would have been difficult to locate by invoice number.

        You can also see the email that had the invoice attached.

4) Common advanced searching for narrowing results (few examples).
<div align="center">Type in: source code agreement</div>

        You will see 2150 documents with source, code, AND agreement in the document (or file name or email subject).

        Show:
                <u>Narrow by grouping</u> – put quotations around the three words as follows: **"source code agreement"**, and you will only see those documents will all three words grouped together. This ends up being a very narrow search with only one result.

Proximity searching – you can widen the results by looking for documents that have source, code and agreement within a maximum of 5 words of each other by adding a **~5** to the search term as follows: **"source code agreement"~5**

You will then see 11 documents that meet these criteria.

5) Additional advanced searching. Example: searching within specific folders
If you would like to search for documents/emails that are only within folders with "closed" in the folder name, then type:

documentLocation:closed

You will get a result of 30313 documents/emails within those folders.

If you are looking for more specific documents/emails within those folders, you can just add the search terms. For example, in looking for the Enron Presentation within those folders, type in:

documentLocation:closed enron presentation

You will now get a result of 5 documents

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