

Opening a Matter and Search Options

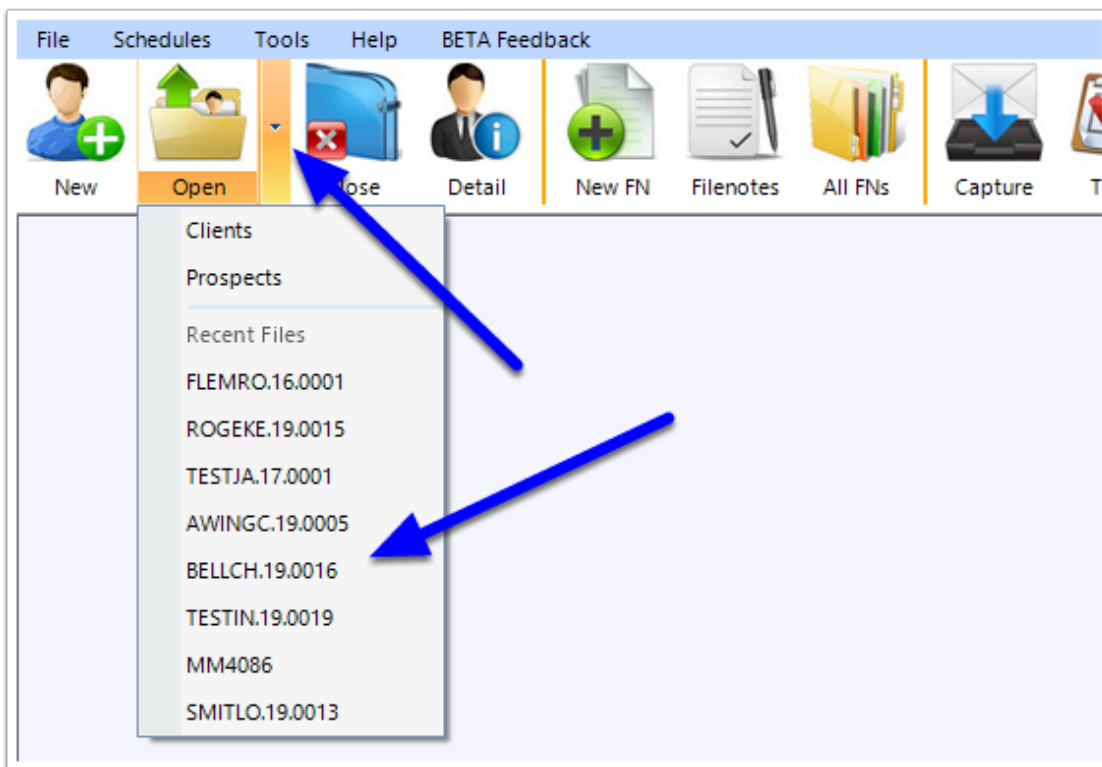
When you open an existing Matter, there are many search options you can take to filter your results. As well as this, you can set default search filters.

Opening a Matter

1. View the most recent 8 Matters.

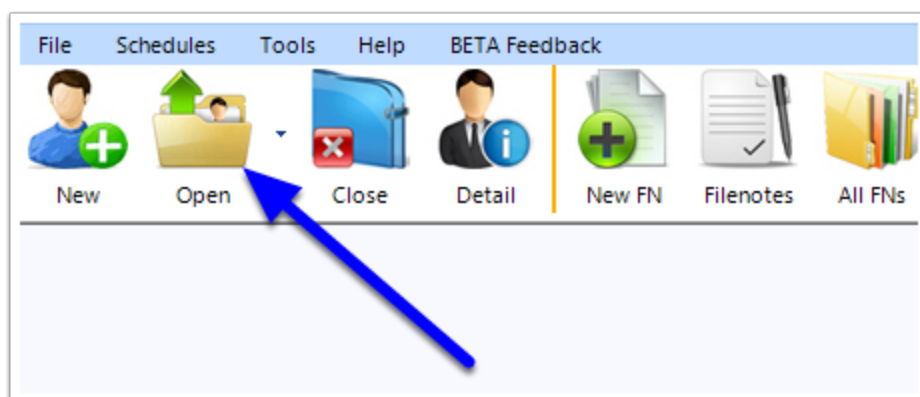
If you know the Matter ID and it has been worked on recently, you can click the **down-arrow** just to the right of the Open button to view the last 8 Matters you have had open.

Then click on the **Matter ID** to open it.



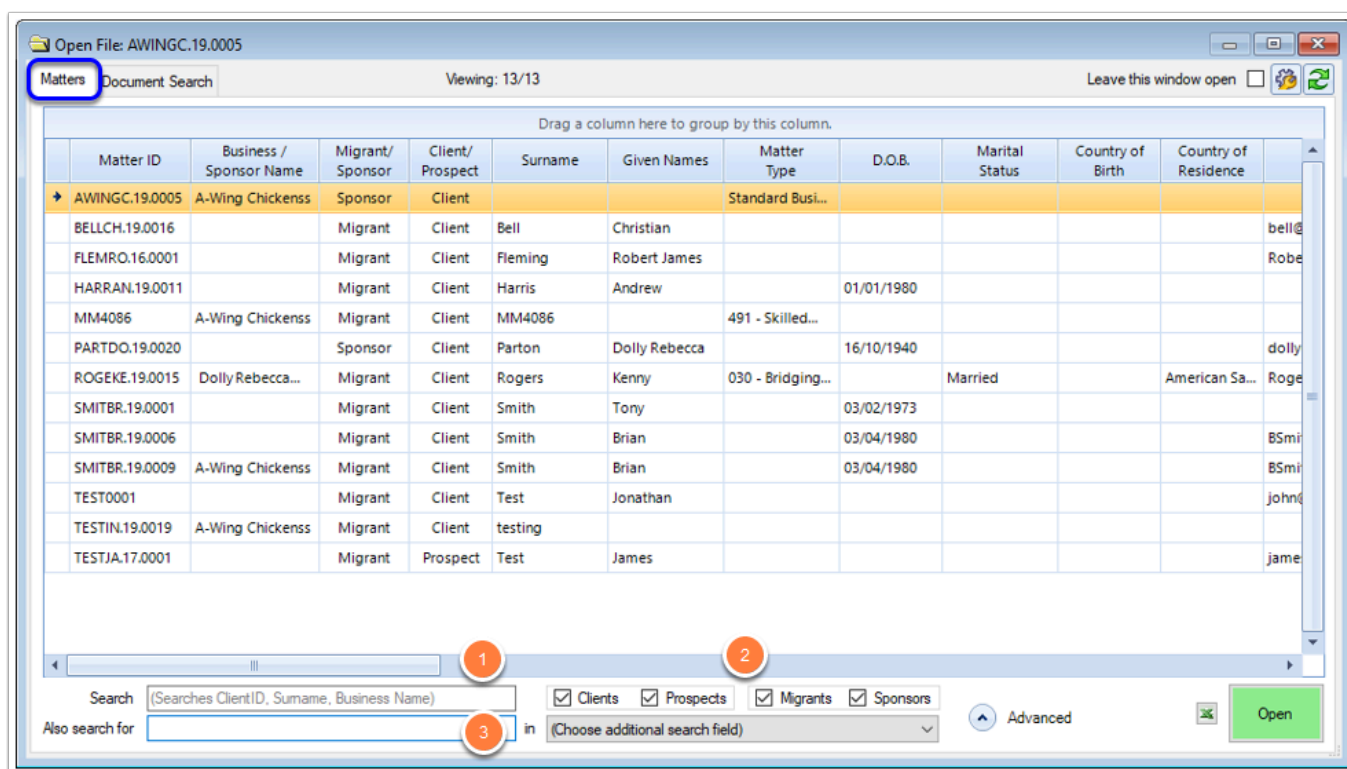
2. Or open the main Open Search window

From the Main Tool Bar, select **Open**.



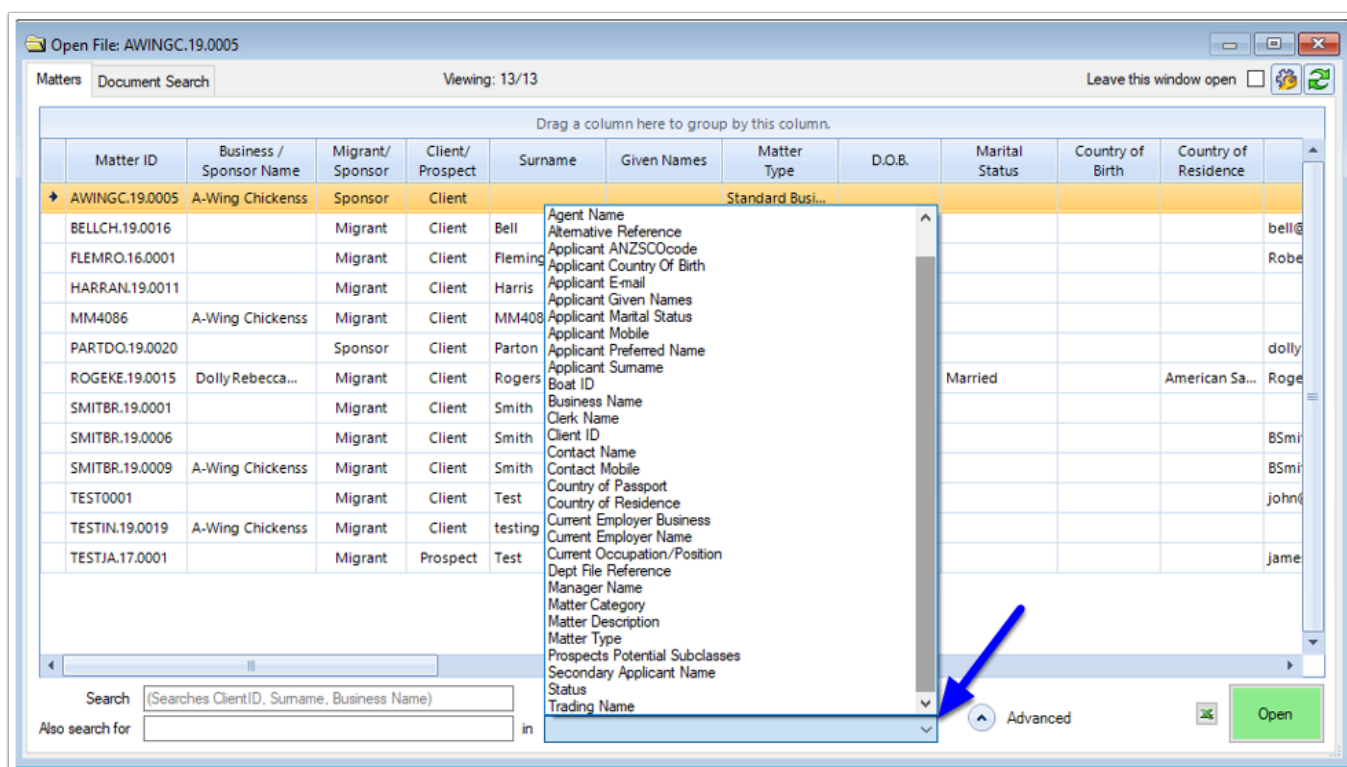
The main Open Search window

Main Search options



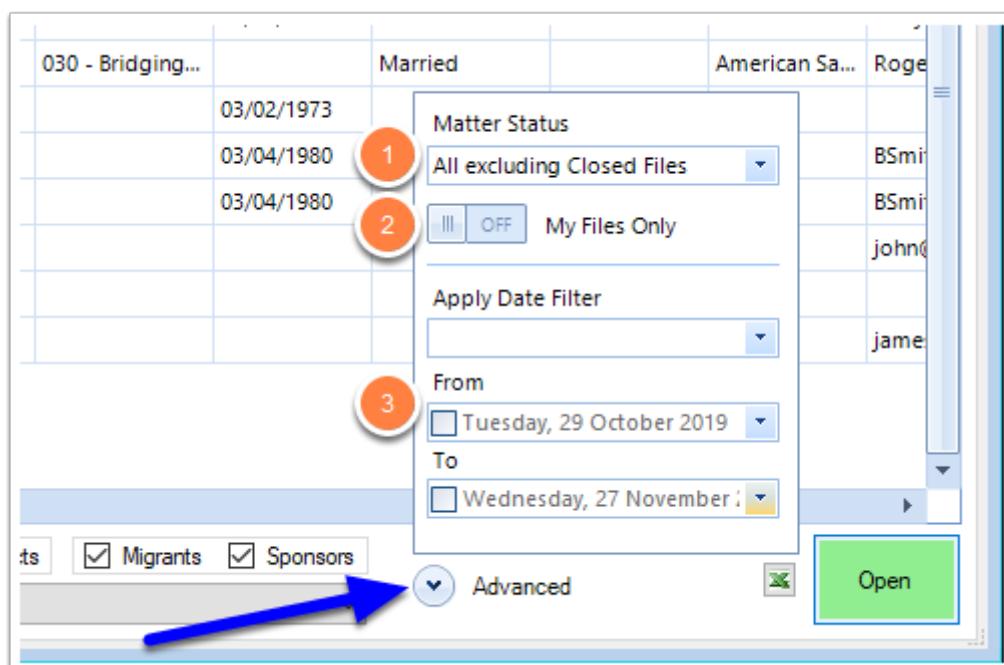
From the **Matters** tab, there are a number of filters you can choose to narrow your search.

1. **Search.** The search box allows you to enter search criteria for the Matter ID, Surname, Given Names, Preferred Name or Sponsor Business Name.
2. **Clients, Prospects, Migrants, Sponsors.** Use these checkboxes to narrow your search to a particular Matter Type.
3. **Also Search For** and **in.** These 2 fields work together to search other fields on the Matter. By selecting a field from the 'In' dropdown, you can then also search for values in that field by typing in the 'Also Search for' field.



Advanced Search options

By clicking the **Advanced** arrow, additional options will be available.



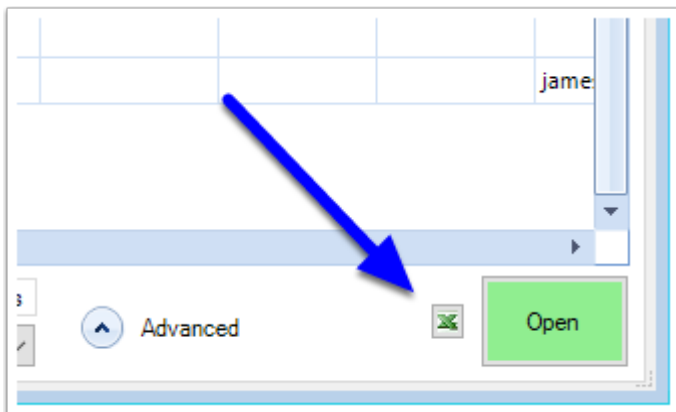
1. **Matter Status.** The Matter Status dropdown allows you to select which Matter Statuses you wish to filter by. Primarily the most common are 'All excluding Closed Files', 'All Including Closed Files'. You can also filter by any particular Matter Status as you like.

2. **My Files Only.** This filter allows you to include only Matters where you are marked as the RMA, Manager or Clerk, or search on all Matters.
3. **Apply Date Filter** and **Date Range.** The Date filter allows you to search by date on particular values against the Matter. The available values are:
 - Applicant DOB
 - Applicant Passport Expiry Date
 - Client Engagement Date
 - Current Visa End Date
 - File First Created
 - Intended Lodgement Date
 - Prospects Created
 - Weblead Converted

Other Features:

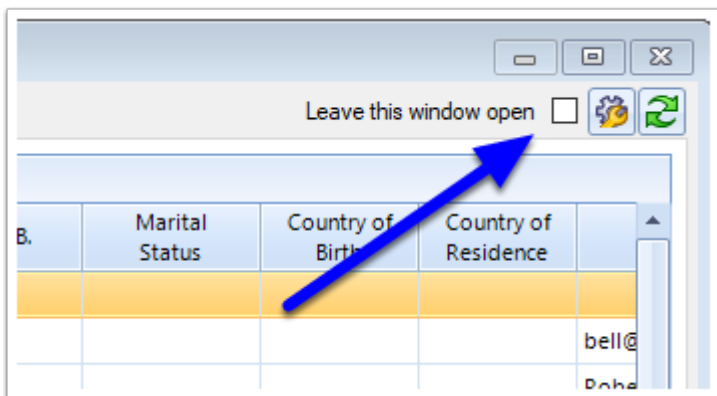
Exporting to Excel.

By clicking the **Excel** button, the contents of search window will export into an Excel spreadsheet.

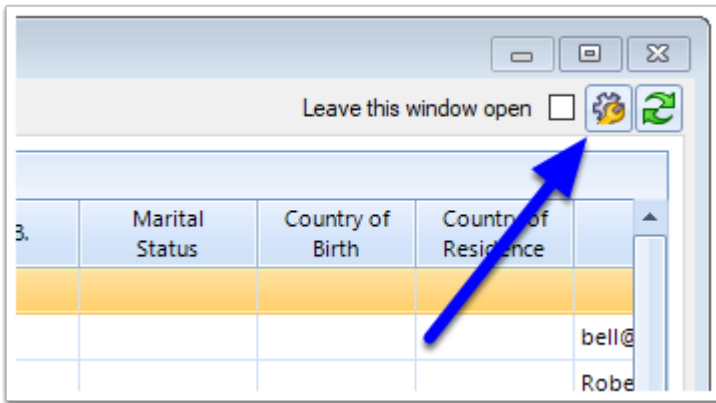


Leave this window open.

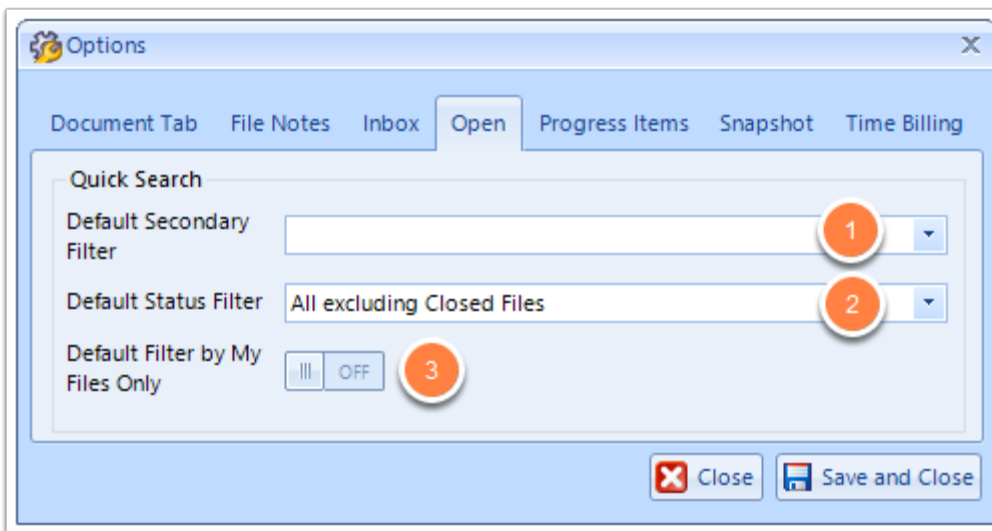
Selecting this option will make the **Open** window stay open after you select a Matter.



User options cog.



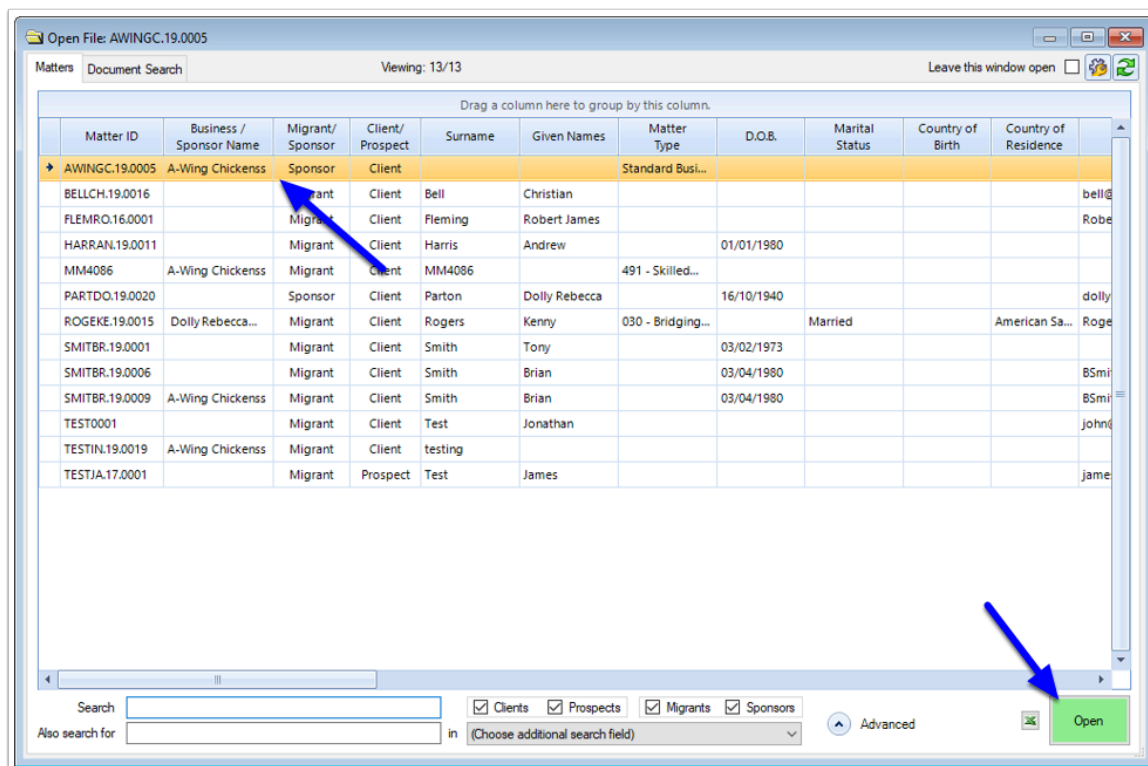
The user Options will allow you to set permanent preferences for your user when the **Open** window is selected.



1. **Default Secondary Filter.** This option sets a default 'Also Search For' **IN** value in the open window (example. You may wish the 'Also Search for' **IN** filter to always default to the Matter's email address).
2. **Default Status Filter.** This option sets a default Matter Status filter in the open window (example. You may wish to always include or exclude Closed files).
3. **Default Filter by My Files Only.** This option will set the default return results to include only Matters where you are marked as the RMA, Manager or Clerk, or include all Matters.

Opening the Matter

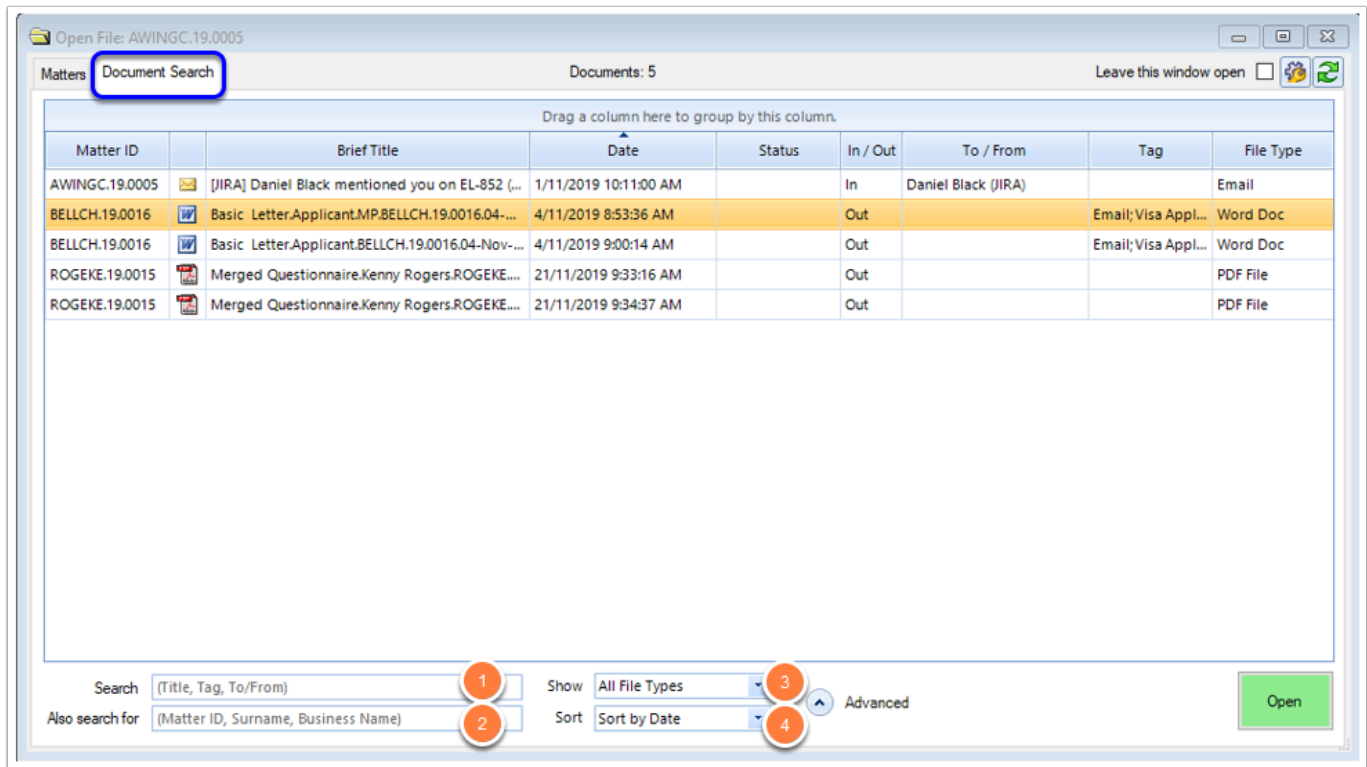
Once you have found the Matter you are after, you can open it either by **double clicking** on the Matter row, or by selecting the Matter, then clicking the **Open** button.



The Document Search tab

The Document Search tab is a powerful tool for searching Migration Manager for a particular document.

The Search Options:



1. **Search.** This field can be used to search documents for the **File Name Title, Tag**, and if an email, the **To** and **From** values.
2. **Also Search for.** This field can be used to filter the search by **Matter ID, Surname** or **Business Name**.
3. **Show.** The show option allows you to filter by File Type (example. **Emails, PDFs, Word Documents** etc).
4. **Sort.** Choose to sort by **Date, Reverse Date** or by **Matter ID**.

Advanced Search Options:

The screenshot shows a search interface with a dropdown menu open for 'Advanced Search Options'. The menu includes the following options:

- Any Status** (highlighted with a red circle 1)
- My Files Only** (highlighted with a red circle 2)
- From** (highlighted with a red circle 3)
- To**

The 'From' and 'To' fields are set to 'Tuesday, 29 October 2019' and 'Wednesday, 27 November' respectively. A blue arrow points to the 'Advanced' button. An 'Open' button is visible in the bottom right corner.

1. **Status.** You can choose to filter by the document's status (example. **Incomplete, With RMA, Complete**, etc)
2. **My Files Only.** This filter allows you to include only Documents where you are marked as the RMA, Manager or Clerk, or search all Documents.
3. **Date range From and To.** Filter by Date Range to narrow your search.

Opening the Document

Once you have found the Document you are after, you can open it either by **double clicking** on the Document row, or by selecting the Document, then clicking the **Open** button.

Open File: AWINGC.19.0005

Matters Document Search Documents: 5 Leave this window open

Drag a column here to group by this column.

Matter ID		Brief Title	Date	Status	In / Out	To / From	Tag	File Type
AWINGC.19.0005		[JIRA] Daniel Black mentioned you on EL-852 (...)	1/11/2019 10:11:00 AM		In	Daniel Black (JIRA)		Email
BELLCH.19.0016		Basic Letter.Applicant.MP.BELLCH.19.0016.04-...	4/11/2019 8:53:36 AM		Out		Email; Visa Appl...	Word Doc
BELLCH.19.0016		Basic Letter.Applicant.BELLCH.19.0016.04-Nov-...	4/11/2019 9:00:14 AM		Out		Email; Visa Appl...	Word Doc
ROGEKE.19.0015		Merged Questionnaire.Kenny Rogers.ROGEKE...	21/11/2019 9:33:16 AM		Out			PDF File
ROGEKE.19.0015		Merged Questionnaire.Kenny Rogers.ROGEKE...	21/11/2019 9:34:37 AM		Out			PDF File

Search (Title, Tag, To/From) Show All File Types

Also search for (Matter ID, Surname, Business Name) Sort Sort by Date

Advanced

Open