ONTARIO ENERGY BOARD

OEB iSearch
intelligent OEB search engine

User Guide
(External)

Version 1.1, Last Updated 12/04/2024

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Introduction

Overview

This guide is designed to help you understand and effectively use the external version of OEB iSearch, a document search tool enhanced with generative AI.

What is OEB iSearch?

iSearch is an advanced document search tool that leverages generative AI to provide you with the most relevant search results based on your search prompts. By understanding the context and nuances of your queries, iSearch delivers highly accurate and useful results, making your search experience more efficient and effective.

Key Features of iSearch

- **Generative AI-Powered Search**: iSearch uses AI technology to interpret your search prompts and return the best possible results. This advanced search capability allows you to find the information you need quickly and accurately.
- **Advanced Filtering Options**: To help you further refine your search results, iSearch offers a variety of filters. These filters enable you to narrow down your results based on specific criteria, ensuring you find exactly what you're looking for.
- **Legacy Functionality**: iSearch retains all the functionality of the existing Regulatory Document Search (RDS) tool, ensuring a seamless transition for users familiar with the previous system. You can perform all the tasks you were accustomed to while benefiting from the new AI-powered enhancements.

Getting Started

In this document, we will walk you through the basic steps to get started with iSearch, including how to perform searches, apply filters, and utilize the legacy features. Whether you are a new user or transitioning from the RDS tool, this guide will provide you with the information you need to make the most of iSearch.

Accessing OEB iSearch

Accessing iSearch

To access iSearch, simply visit the following web link: <u>OEB iSearch</u>.

Overview

Below is a view of the main search page:
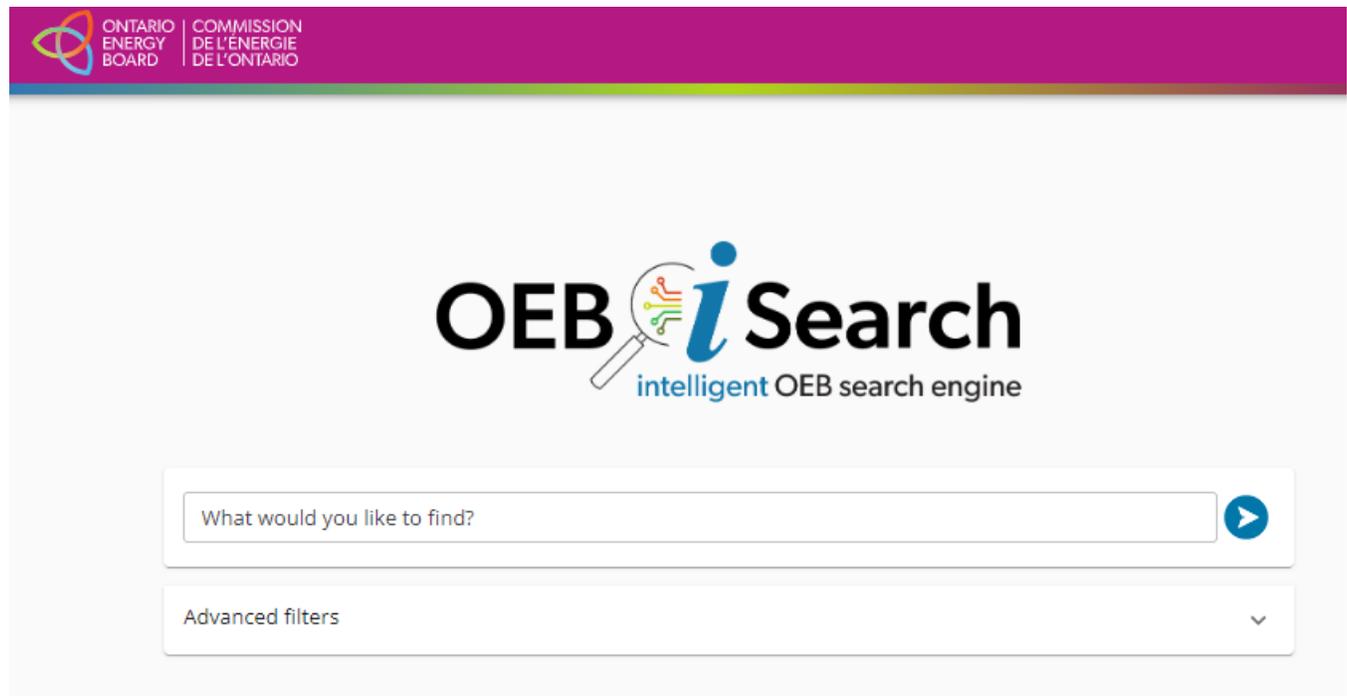
1. **Search Prompt Field**: At the middle, you will find the search prompt field. This is where you can type in your search query. The AI empowered Search Engine will analyze your prompt and provide you with the most relevant results.
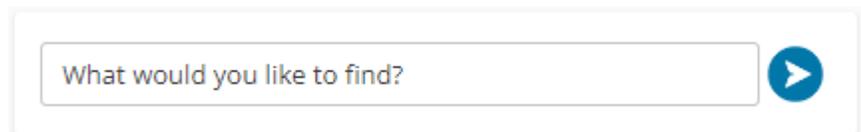
2. **Advanced Filters Section**: Directly below the search prompt field is the Advanced Filters section. This section contains various filters that you can use to narrow down your search results based on specific criteria. These filters help you refine your search

and find the exact documents you need.

Search

The Search page (also known as the Home Page), is where Users can perform their initial document search. There is a search bar where users can input criteria/filters, as well as an Advanced Filters section to further refine the search.

Performing a Search

One of the most significant improvements with iSearch is the introduction of robust keyword searching. This feature allows users to search for specific words or phrases across all documents, making it easier to find relevant content quickly.

1. **Enter Your Search Prompt**: In the search prompt field, type in the keywords or phrase you are looking for. The more specific your prompt, the more accurate the results will be.

2. **Apply Advanced Filters**: If you need to narrow down your search results, use the filters in the Advanced Filters section. You can filter by document type, date, author, and other relevant criteria.

3. **View Results**: Once you have entered your search prompt and applied any filters, click the Search arrow button. The results will appear on the Results Page. Click on any document to view more details.

   Some key distinctions users coming from RDS will experience with iSearch:

- AI enabled semantic keyword searching
- Easily update search criteria
- Refine post search results by adjusting filters
- New Document attributes to search by (ie: application sub type)
- Download multiple documents at once

Best Practices

Be Specific

- When searching for documents or content within them, it's important to be as specific as possible with your search terms. This ensures that you retrieve the most relevant results, reducing the need to sift through unnecessary information.
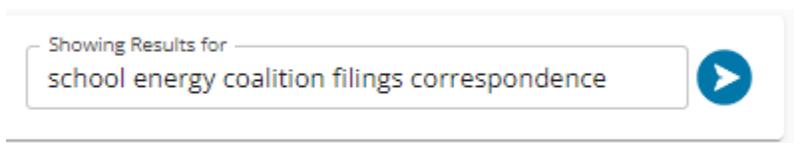
   Note: Don't worry too much about grammar; iSearch is built to parse through the information provided and present the most relevant documentation.

Use Keywords You Expect in the Document

- Identify and utilize keywords that are likely to appear in the document you're searching for. This could include terms related to the subject matter, specific phrases, or terminology unique to the content area. Using expected keywords helps narrow down search results effectively.

Keyword Searching to Get Specific Documents or Specific Content from a Series of Documents

- Use keyword searches to pinpoint either a specific document or content within a series of documents. By providing specific terms, you can quickly locate relevant information, even within a large dataset.

Use Your Filters

- Filters are a powerful tool for refining search results. Utilize them to limit your search to specific types of documents, dates, case number, or other relevant categories, ensuring that the results are targeted.
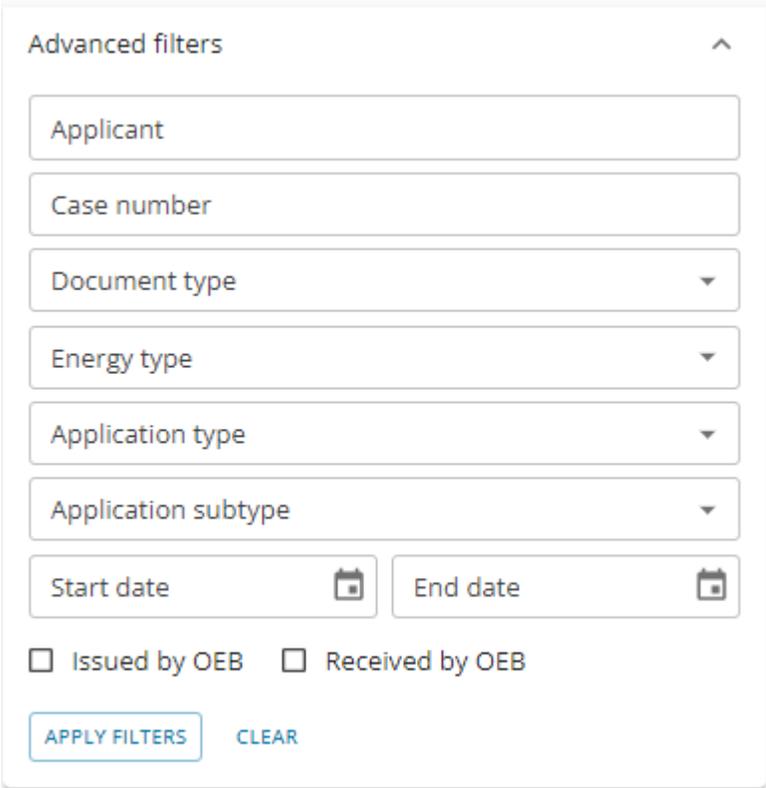
Advanced filters ⌃

Applicant

Case number

Document type ▾

Energy type ▾

Application type ▾

Application subtype ▾

Start date 📅   End date 📅

☐ Issued by OEB   ☐ Received by OEB

APPLY FILTERS   CLEAR

Note: Filters are available and adjustable on the results page. This will behave identical to performing a search on the Search Page.

Find Specific Documents – Keywords vs. Filter vs. Dynamic Searching

- There are various ways to locate specific documents:
  - **Keywords:** Searching by keyword is effective when you know the document's name or expect certain words in the document.
  - **Using Filters:** Filters can quickly narrow down a large pool of documents based on specific criteria, such as date, author, or EB#.

- o **Dynamic Searching:** Dynamic searching allows for more flexible, on-the-fly searches that can adjust based on the initial results, helping you refine your search iteratively. After performing an initial search, you can update keywords or filters and re-apply to update your results.

Results Page

After performing a search, you will be directed to the Results Page. This section will guide you through the features and functionalities available on this page.

List of Search Results

On the Results Page, you will see a list of your search results. This list is organized into columns that display key details about each document. The columns typically include:

Default Columns:

- **Document Title:** Official title of the document.

- **Applicant**: The name of the individual or entity that submitted or is associated with the document.

- **Case Number**: A unique identifier assigned to each case.

- **Relevancy**: Indicates how closely the document matches the user's search criteria or keywords. This is graded on a scale from 0 to 4, with 4 representing the highest relevancy. A higher relevancy score suggests that the document is more pertinent to the user's query.

- **Document Type**: Specifies the category of the document, such as a decision, submission, or correspondence.

- **Date:** Date the document was issued or received by OEB.

    - Issued (I) and Received (R) are indicated within the date column.

Additional Columns Available:

Click the ellipses at the top of the results page to view column management options:

Modifying Columns: Select which columns you want to display by using the column customization options above the Results List.

Sorting: Click on any column header to sort the results based on that column. For example, click on the "Date" column header to sort the results by date, either in ascending or descending order.

Pin to Left/Right: Lock the column to a location on your screen.

Filter: Perform a specific filter to view only certain documents in the search. This will not update your overall search, it will only update the view of the current documents in the results list.

Modify Search and Filter Results

On the left of the Results Page, you will find the Search and Filters section. This area allows you to modify your search prompt and adjust filters to refine your search results. You can enter new search terms or update your filter criteria, then click the search button to perform a new search.

In this example, the original search with no filters returned over 46,000 results. By adding Document Type and Date filters, the search is refined to 25 results with varying relevancy.

Showing Results for

school energy coalition ▶

Advanced filters ⌃

Applicant

Case number

Document type ▾

Energy type ▾

Application type ▾

Application subtype ▾

Start date 📅   End date 📅

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APPLY FILTERS   CLEAR

Displaying the top 102 of 46,623 total results

▐▐▐ COLUMNS   ⇌ FILTERS   ☰ DENSITY   ⬇ EXPORT

☐	File name	Applicant
☐	School Energy Coalition_SEC_2023_...	Ontario Energy Board
☐	School_Energy_Coalition_Comments...	Ontario Energy Board
☐	EXH KM1.1_SCHOOL ENERGY COALI...	Enbridge Gas Inc. - Ga...
☐	SEC_IR_HONI_20140904.PDF	Hydro One Networks I...
☐	SEC_ IR_Guelp_20101115.DOC	Guelph Hydro Electric ...
☐	SEC_IntvREQ_Entegrus_20150928.PDF	Entegrus Powerlines I...
☐	SEC_intvnr_REQ_20200305.PDF	Hydro Ottawa Limited ...
☐	EB-2018-0050 SEC Notice of Interve...	Lakeland Power Distri...
☐	SEC_INT_REQ_20180911.pdf.PDF	Niagara-on-the-Lake H...

Showing Results for
school energy coalition

Applied filters 2

Applicant	
Case number	
Document type Intervenor Request Letter	▼
Energy type	▼
Application type	▼
Application subtype	▼
Start date 01/01/2024 📅	**End date** 📅

☐ Issued by OEB ☐ Received by OEB

APPLY FILTERS CLEAR

Displaying the top 25 of 25 total results

III COLUMNS   ≡ FILTERS   ≡ DENSITY   ⬇ EXPORT

☐	File name	Applicant
☐	SEC_IntrvREQ_EGI_GSP_20240425.P...	Enbridge Gas Inc
☐	SEC_IntvRQST_20240207.PDF	Ontario Power G
☐	SEC_Intervenor Form_20240308.PDF	Ontario Energy E
☐	The Society of United Professionals_...	Ontario Power G
☐	Coalition of Concerned Manufactur...	Ontario Power G
☐	CCMBC_IntrvREQ_THESL Rates_2024...	Toronto Hydro-E
☐	CCMBC_Intervention Form_2024032...	Ontario Energy E
☐	SUP_Intervention Form_20240325.P...	Ontario Energy E
☐	CCMBC_IntvRQT_20230118.PDF	Newmarket-Tay

Showing Results for
school energy coalition

Applied filters 2

Applicant	
Case number	
Document type Intervenor Request Letter	▼
Energy type	▼
Application type	▼
Application subtype	▼
Start date 01/01/2024 📅	**End date** 📅

☐ Issued by OEB ☐ Received by OEB

APPLY FILTERS CLEAR

Both the filters and keyword search criteria can be modified on the results page to continuously update the list of results.

> **Note:** This is the same functionality as the Search Page you started on; This prevents you from needing to navigate back to the Search Page to refine your searches.

Export to CSV

To export your search results, click on the "Export to CSV" button. This will download a CSV file containing the details of all the documents in your search results.

⤓ EXPORT

| Download as CSV |
| Download as Excel |
| Print |
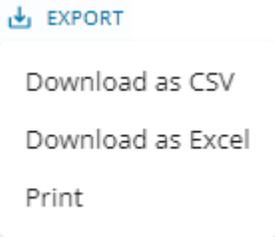
Download Selected Files ☁ DOWNLOAD (3)

If you want to download specific documents, you can do so by selecting the files via the checkboxes next to each document. Once you have selected the desired documents, click the "Download" button to download them to your device.

Displaying the top 25 of 25 total results   ☁ DOWNLOAD (3)   ⟨ SHARE

▥ COLUMNS   ☰ FILTERS   ☰ DENSITY   ⤓ EXPORT

	File name	Applicant	Case number	Document type	Relevancy	Date	
☑	SEC_IntrvREQ_EGI_GSP_20240425.P…	Enbridge Gas Inc…	EB-2024-0067	Intervenor Requ…	2.68	04/25/2024	R
☑	SEC_IntvRQST_20240207.PDF	Ontario Power G…	EB-2023-0336	Intervenor Requ…	2.68	02/07/2024	R
☑	SEC_Intervenor Form_20240308.PDF	Ontario Energy B…	EB-2024-0063	Intervenor Requ…	2.52	03/08/2024	R
☐	The Society of United Professionals_…	Ontario Power G…	EB-2023-0336	Intervenor Requ…	1.77	02/19/2024	R
☐							

Share Search Criteria

⟨ SHARE

The **Share** button in iSearch allows you to easily share your search criteria with others who have access to the system. This feature is especially useful for collaboration, ensuring that your team or colleagues can start their search with the same keywords and filters that you used.

- **Generating a Shareable Link**:
  - After setting up your search, you can click the **Share** button to generate a unique link. This link can be shared with anyone.
  - When someone uses the shared link, they will be brought to the search page with the same keywords and filters you originally applied, allowing them to see the results generated by that search criteria.
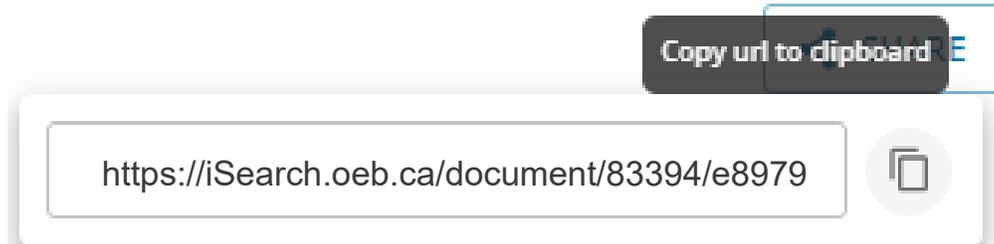
Pagination

If your search returns a large number of results, they will be divided into multiple pages. Use the pagination controls at the bottom of the Results Page to navigate through the pages. You can go to the next page, previous page, or jump to a specific page number.

Note: Results are limited to a maximum number of displayable records. If your results are too expansive, you can refine your search with a more specific prompt, or additional filters.

Frequently Asked Questions

How does iSearch differ from the RDS?
iSearch is a new document management and search platform that will at some point replace RDS. Unlike RDS, iSearch offers advanced search capabilities, including keyword and phrase searching, and making it easier to find specific documents or content within documents. Additionally, OEB plans to introduce future-proof enhancements to further the document retrieval and analysis experience.

How does the relevancy score work in iSearch?
The relevancy score in iSearch indicates how closely a document matches your search criteria. It is graded on a scale from 0 to 4, with 4 being the highest relevancy. A higher score means that the document is more relevant to your search keywords or phrases, helping you prioritize your review of search results. Note only searches with a keyword will have a relevancy score.

What should I do if I can't find a document using iSearch?
If you can't find a document using iSearch, try refining your search terms or using additional filters. You can also check the relevancy scores to ensure that highly relevant documents are being considered. If you're still having trouble, contact support for further assistance.

Can I still use RDS?
RDS will continue to be available alongside OEB iSearch, however, we encourage you to start using iSearch to familiarize yourself with its features and benefits, as RDS will eventually be phased out.

Support and Contact Information

For support, please email: ithelp@oeb.ca.

Appendix

FEEDBACK AND IMPROVEMENTS

- As you explore the tool, we encourage you to share your feedback by emailing <u>iSearch@oeb.ca</u>.