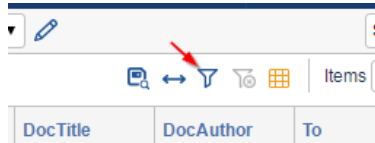


How to: use Filters

This document will walk you through Relativity's Filtering feature. Filtering can be used to narrow results from a list but they are not a search feature. If you plan on using filters on fields in your search and saving it as a search, a best practice is to use Add Conditions and the same operators covered here. Filtered results can be exported to a file, and saved as a list. Filters can be applied over multiple fields or columns that are displayed in the list views. This includes the fields returned in a saved search. For this example, we will use Document View. To open the filters options, click on filter icon as shown here.

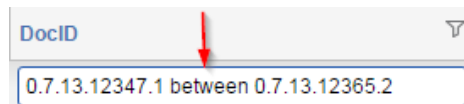


This will open the Filter Bar just below the Document List header. Different fields use different filter options or operators:

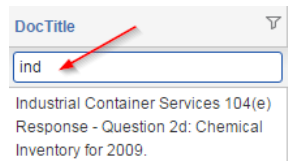
- **Boolean** fields: support **Yes**, **No** and **Blank** options
- **CustomOnly** fields: support filtering criteria using a combination of advanced and Boolean operators. This will open a popup menu allowing you to add choices for the field selected. See below for more details.
- **List** Fields i.e. **Single** choice fields provide a dropdown menu to select one choice
- **MultiList** filters support **Multiple** choices with a connection option of **And** or **OR**
- **Text box** filters is a text box where you enter content and use operators.

AND
OR
= (equals)
> greater than
< less than
>=greater than or equal to
<= less than or equal to
BETWEEN

1. For our first example we will use the operator **BETWEEN** in the *Documents View*, and filter on the field **DocID**. Entering a range of documents, we would like returned. **0.7.13.12347.1 between 0.7.13.12365.2**



2. The **BETWEEN** operator is used to find ranges in any alphanumeric field.
3. Using Text fields supports **AND**, **OR** and automatically support wildcards, for example, entering **Ind** return all documents containing **Industrial** in the selected field.



To clear any filters that have been applied click this icon.

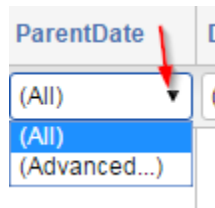
How to: use filters



Advanced or **Custom** filters are available for the following types of fields:

- Fixed Length
- Decimal
- Whole Number
- Currency
- Date

Advanced filters are displayed as shown below.

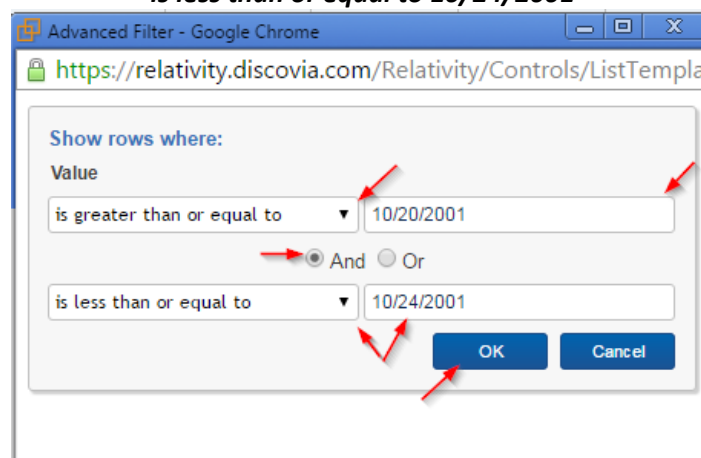


Once you have clicked **Advanced**, a new popup window appears as shown below. Once opened set the conditions for the filter and click **OK**. In this example we are using the following criteria:

is great than or equal to 10/20/2001

AND

is less than or equal to 10/24/2001



Once **Ok** is clicked, Relativity returns all documents that fall into this range.

We hope this information was helpful. For additional assistance please feel free to contact your project manager.