

# Search Primer

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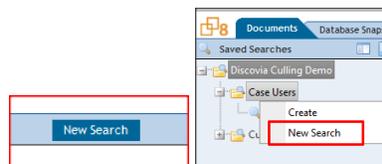
## Crafting Searches?

Most of your time in Relativity will be spent crafting and reviewing searches. To access the search functionality, you can select Add Condition from the Searching pane in Relativity or access the Saved Search module by finding and clicking on the magnifying glass at the top left-hand side of the workspace. In this document, we will work from the Saved Search Module.



## Creating a New Search

You have two options to create a new search from the Saved Search Module: (1) click on the highest-level search folder (which is named after the matter name) and then select the blue "New Search" button, or (2) right-click on a search folder and select "New Search". If you start from a folder, your search will automatically save in that folder when you click on Save.

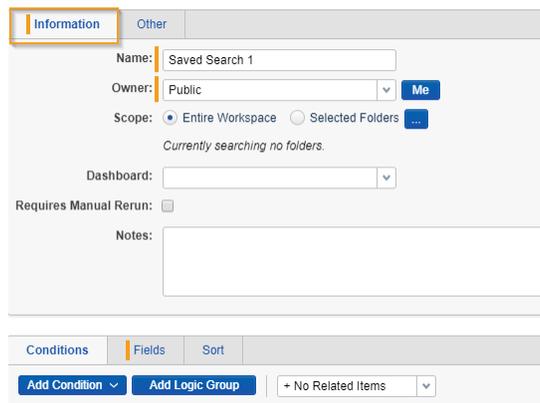


## Inputting Search Criteria

There are 5 sections to consider when inputting your search criteria into the search module:

- (1) Information (search basics like name and scope)
- (2) Other (used to place notes or hints about the search)
- (3) Conditions (search terms and/or metadata restrictions)
- (4) Fields (metadata fields that will be returned in your search results view)
- (5) Sort (the order in which the search results are returned in your search results view)

1. **Information:** You must name your search in the **Name** text box. Next, you must decide if you want the search to be private to you or public to the team. Selecting your name will make the search private. Next, you must decide the **Scope** of your search. You have the option to search the entire database or you can select specific volume folders using the "Select Folders" hyperlink.



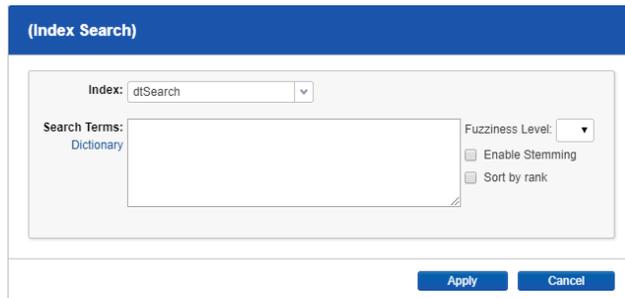
2. **Other:** Is used to add hints and keywords that are not included in the search.
3. **Conditions:** This is the section where you can select fields to search including the searchable indexes, of dtSearch or keyword, metadata or coding fields. Simply select the **Add Condition** pulldown menu to select the **field** or **Index Search**.

**Hint:** Naming your search is important. Including the date, you created the search helps easily track changes and adding prefixes can help keep searches orderly, e.g. Search01\_Term\_20140525".

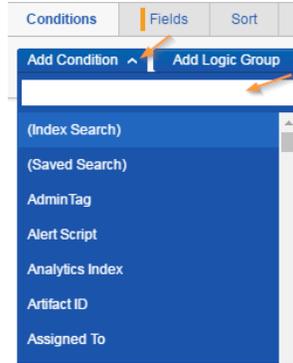
**Hint:** There is an important order of operation with Relativity searching. Your search will fulfill: (1) the metadata conditions and the dtSearch term box first and then (2) If you choose to include attachments it will pull in all attachments associated with the documents that result from the applied metadata conditions and dtSearch options, even if the attachments do not meet the search criteria (i.e. terms or metadata restrictions).

**Hint:** Saving your searches as private limits the visibility and will prevent other users from using your searches. This can sometimes cause confusion, so we recommend saving all searches as Public.

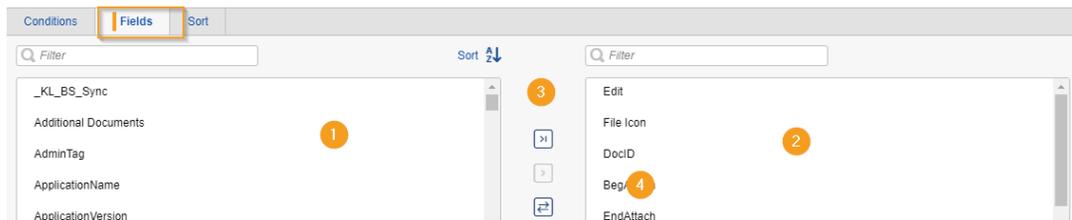
- a. Selecting **Add Condition** and selecting **Index Search** opens the search term box. In the **Search Terms** text box, you may enter search terms in dtSearch syntax (AND, OR, w/5, \*, etc.). The "Dictionary" hyperlink allows you to type in a term and see how many times it appears in the data. Keyword can also be selected from the menu.



- b. **Add Conditions:** In this section, you can include any necessary **metadata** or coding fields to your searches. In the **Field**, you can select any available metadata field. For example, you can search on ParentDate or CustodiansALL, but you must then determine which **Operator** to use. For example, you can select **IS** or **IS LIKE** or **IS AFTER**, depending on the type of metadata field selected. You must then type in or select your **Value** that you want to be searched. For example, your search could be **ParentDate IS AFTER 1/1/2010** or **DocAuthor IS LIKE "Smith"**. Multiple lines of metadata restrictions can be inputted as separate lines (up to 10 lines) in a single search. Each line can be ANDed or ORed together.



4. **Fields:** This section allows you to add or remove additional metadata fields from the search results so you can get a better sense of your results. Fields on the left-side (1) are not returned. Fields on the right-side (2) are returned. You can select and deselect fields from either column using the blue arrows (3) in the center. You can reorder the fields being returned by simply dragging them up or down.



5. **Sort:** This section allows you to sort your search results by a metadata value. For example, if you wish to see your search results ordered chronologically, you would select ParentDate ascending or ParentDate descending depending on your needs.



**Hint:** The higher the field on the returned list (#2 above), the further to the left it will appear in your search results view. The lower down the field on the returned list (#2 above), the further to the right it will appear in your search results view.

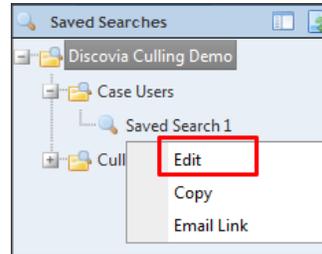
**Hint:** Edit and File Icon are defaults fields and the default start of every list. You can leave them be. No need to remove or reorder those two fields, instead start at DocID.

**Hint:** User Help tab explains all the pertinent metadata values and what they represent in Relativity. Also see appendix for standard field list.

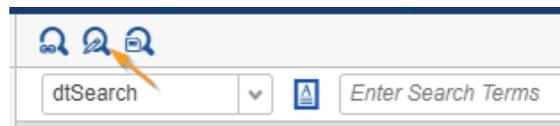
**Hint:** You don't have to search on a specific metadata field, in order to, return it in your search results view. For example, you can search for ParentDate values but return fields for DocID, CustodiansALL, and DocTitle.

## Editing a Search

You can edit a search in one of two ways: (1) from the **Saved Search Folders**, find the name of the search you wish to edit, right-click the search name and select "**Edit**":



Or (2) once you have executed a search and are looking at the search results, you can edit that executed search directly from the results view by clicking on the **Magnifying Glass/Pencil icon** above the results:

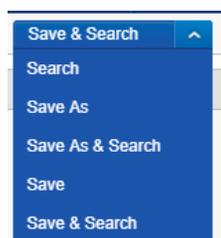


Either of these options will immediately take you back to the search criteria where you may adjust it as necessary.

## Saving a Search

There are 5 options available to you once you have inputted your search criteria into the search module:

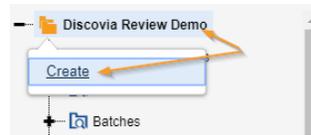
- (1) **Search** (executes your search and does not save the criteria)
- (2) **Save As** (saves your search as a new search and will not overwrite an existing search)
- (3) **Save As & Search** (performs like Save As but will immediately execute your search as well)
- (4) **Save** (saves your search and will overwrite an existing search by the same name)
- (5) **Save & Search** (performs like Save but will immediately execute your search as well)



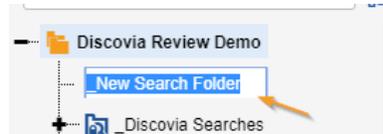
**Hint:** Sometimes, when not applicable, "Save As" and "Save As & Search" are greyed out and unavailable as options because there is no search to overwrite. In those instances, if you wish to save your search criteria use the "Save" or "Save & Search" option instead.

## Organizing Your Searches

All saved searches are ordered in the Saved Search folder tree. You can create new folders by right-clicking the highest-level folder and selecting "**Create**." To create subfolders, you follow the same process of right-clicking and selecting "**Create**." You can reorganize saved searches by dragging them into other folders.



Next **Rename** the folder to your name or another name that is unique and easy to find.



**Hint:** We recommend you create your own folders in the Case Users folder, one per reviewer. This will help keep your searches organized. We will create a **“Requested Search”** folder if we ever need to create searches for your team.

## Other helpful hints

**Hint:** The Dictionary tool will help provide insight into the number of documents for any given term, which may be particularly useful in discovering unknown term variations, misspellings, and term counts for wild-carded terms. This feature is helpful for term iteration.

**Hint:** Leaving "Includes" blank means only *direct hits* of your search criteria will be returned. If you choose "Include Attachments" your search will return all *direct hits* as well as their *family members*.

**Hint:** Do not use enter or hard-returns in the Search Terms box. Your terms should be listed out as one line of syntax separated with Boolean operators where needed.

Good: apple OR pear OR banana

Bad:

apple  
pear  
banana

**Hint:** We do not recommend using the Fuzzy or Stemming settings because you will not know exactly which terms you are running. You can use these features in the Dictionary tool to help with term iteration but avoid these settings in your final searches.

**Hint:** You don't have to search on a specific metadata field to sort by it. For example, you can search for CustodianALL values, but sort the results by ParentDate.

**Hint:** You can sort by up to five different metadata fields, but sorting can negatively impact search performance. As such, we recommend sorting by no more than one metadata field.

**Hint:** Operators are very important. For example, IS means that the search must match *exactly* what you have included in your Value box while IS LIKE means that the metadata fields must *include* what you have typed in your Value box, but it could also include other information. For example, email metadata often includes more than just one person, so IS LIKE is the preferred operator. See appendix for Operator definitions. **Remember to put quotes around phrases when using IS LIKE as your operator.** For example, DocAuthor IS LIKE Smith, John is interpreted as Smith OR John without quotes. You should, instead, input DocAuthor IS LIKE "Smith, John".

**Hint:** You can include a previously saved search as a metadata restriction using the Field named "Saved Search." Just be sure to know the name of the previously-saved search before you craft your new search.

**Hint:** While metadata restrictions can be ORed together in the "Conditions" section, any search terms entered in the "Search Conditions" section will be ANDed together with any metadata restrictions in the "Conditions".

**Hint:** Value box entries can be separated by enters or hard-returns unlike your dtSearch terms.

**Hint:** Field recommendations:

Use **ParentDate** instead of DocDate to keep emails and attachments together

Use **DocTitle** if you need to search for subject lines in emails

Use **DocAuthor** if you need to search email senders

Use **RecordType** if you need to narrow results to just emails or loose files.

Use **ParentChild** if you need to narrow results to just parents, attachments or standalone records.

## Relativity dtSearch syntax Cheat sheet

Characters (A through Z; a through z; and &) and digits (0 through 9) are indexed and thus searchable. Hyphens are indexed both as a space and a hyphen (e.g. searching "attorney-client" is the same as searching "attorney client"). Noise words are not applied, so all words are indexed. Clicking on "Dictionary" will provide a list of all possible term variations.

Wildcard	*
Fuzzy	%
Stemming	~
Single Character Wildcard	?
Single Digit Wildcard	=

dtSearch utilizes Boolean operators including: AND, OR, NOT, w/ (examples in blue below) and wildcards (examples are below).

dtSearch String	Returns Documents With:
<b>apple pear</b>	The exact phrase "apple pear"
<b>"apple pear"</b>	The exact phrase "apple pear"
<b>apple AND pear</b>	The word "apple" and the word "pear"
<b>apple OR pear</b>	Either the word "apple" or the word "pear"
<b>apple w/5 pear</b>	The word "apple" within 5 words <i>before or after</i> the word "pear"
<b>apple pre/5 pear</b>	The word "apple" within 5 words <i>preceding</i> the word "pear"
<b>apple AND NOT pear</b>	The word "apple" appears but the word "pear" does not appear
<b>apple NOT w/5 pear</b>	The word "apple" appears but not within 5 words <i>before or after</i> the word "pear"
<b>apple w/5 xfirstword</b>	The word "apple" appears in the first 5 words of the indexed text
<b>apple w/5 xlastword</b>	The word "apple" appears in the last 5 words of the indexed text
<b>mail(*@discovia.com)</b>	All emails to, from, cc, bcc the discovia.com domain, includes matches in body.
<b>date(02/28/13)</b>	All date variations of February 28, 2013 including 2/28/13, 2013/02/28, etc.
<b>appl*</b>	Matches <b>appl, apple, application</b> , etc.
<b>*cipl*</b>	Matches <b>cipl, principle, participle</b> , etc.
<b>appl?</b>	Matches <b>apple, apply</b> but not apples.
<b>ap*ed</b>	Matches <b>aped, applied, approved</b> , etc.
<b>a===</b>	Matches <b>A123</b> but not ABCD.
<b>apply~</b>	Matches <b>apply, applied, applies</b> .

## Saved Search Operators

When crafting metadata-based restrictions, in saved searches, you must select an operator. Depending on the type of metadata field (date-specific, text-specific, etc.) selected, different operators are required. Below, is the list of operators available in Relativity.

<b>Operator</b>	<b>Returns Documents Where:</b>
<b>Is</b>	The entered value is equal to the field value (i.e. exactly matching)
<b>Is not</b>	The entered value is not equal to the field value (i.e. not exactly matching)
<b>Is like</b>	The field contains all or part of the entered term even if the term is surrounded by other characters
<b>Is not like</b>	The field does not contain the entered term
<b>Is set</b>	The field is not empty (i.e. has a value)
<b>Is not set</b>	The field is empty (i.e. does not have a value; null)
<b>Any of these</b>	Any of the selected choices are present in the field
<b>None of these</b>	None of the selected choices are present in the field
<b>All of these</b>	All of the selected choices are present in the field
<b>Not all of these</b>	The selected choices are not present in the field
<b>Is before</b>	The field value is before the entered date
<b>Is before or on</b>	The field value is before or on the entered date
<b>Is after</b>	The field value is after the entered date
<b>Is after or on</b>	The field value is after or on the entered date
<b>Between</b>	The field value is between the two entered dates, inclusively
<b>Contains</b>	The field contains the entered term
<b>Does not contain</b>	The field does not contain the entered term

## Standard Field List for Culling Cases

Relativity Fields	Full Description
DocID (Identifier)	Document ID assigned to each record
BegAttach	Assigned DocID of the first record and attachment range.
AttachCount	Number of attachments contained in the email or container file
Custodian	Custodian of original source files
Source	Fully qualified original path to the source folder, files, and/or mail stores.
FileFolder	Full path to source files or folder path contained with a mail store (if NSF or PST)
FileName	Original filename of native file. Contains subject of e-mail message for e-mail records.
FileExtension	File extension of electronic file.
DocType	Description of electronic file type.
RecordType	Description of record type (Email, Attachment, Loose File)
DocDate	Date sent or Date recvd or Date last mod or Date created. In this hierarchy.
ParentDate	Create date of parent document or date email sent of parent document for all attachment family members; field allows for attachment families to sort together.
DocTitle	Email_Subject or Title or Filename. In this hierarchy.
DocAuthor	From (email) or Author (edocs)
Author	Author field value pulled from metadata of the electronic file.
From	Author of email.
To	Name(s) of email recipients
CC	Name(s) of email Carbon Copyees
BCC	Name(s) of email Blind Carbon Copyees
Title	Text entered in the Title Document Property of electronic files
EmailSubject	Subject of email or the text entered in the Subject Document Property of electronic files.
Comments	Comments field value pulled from the metadata of the native file.
Revision	Revision number extracted from metadata of native file.
Organization	Company field extracted from metadata of native file.
FileSize	Size in bytes of electronic file
MD5Hash	MD5 algorithm result for attachment or electronic file. Used for de-duplication.
SHA1	SHA1 algorithm result for attachment or electronic file. Used for de-duplication.
DateReceived	Date email was received
TimeReceived	Time email was received
DateSent	Date email was sent
TimeSent	Time email was sent
DateAppStart	Date appointment starts
TimeAppStart	Time appointment starts
DateAppEnd	Date appointment ends
TimeAppEnd	Time appointment ends
DateCreated	Date electronic file or email was created
TimeCreated	Time electronic file or email was created
DateLastModified	Date file was last modified
TimeLastModified	Time file was last modified
DateLastPrinted	Date file was last printed
TimeLastPrinted	Time file was last printed
VolID	Manually populated with specified volume name.
Extracted Text	Extracted Text from electronic file or OCR