Legal Technologies **US**



Advanced Searching in RelativityOne

KLDiscovery™

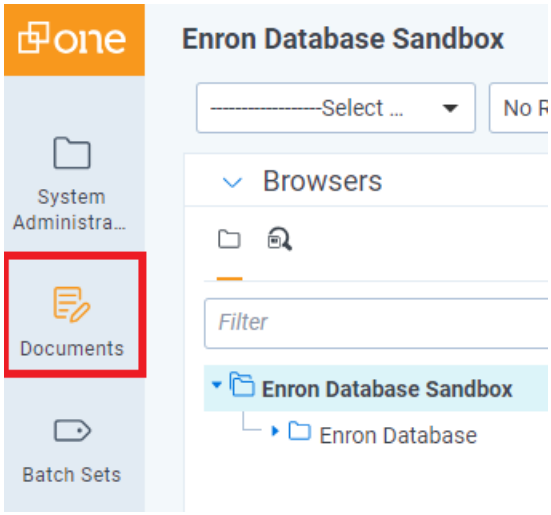
Advanced Searching in RelativityOne

The following guides you through creating advanced searches in RelativityOne with the New Search page on the new user interface.

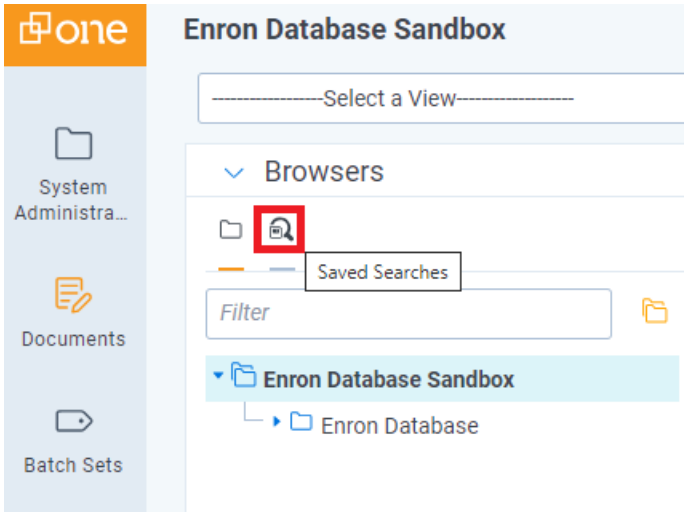
(For further information, please see Creating or editing a saved search in RelativityOne User Documentation.)

Accessing the New Search page

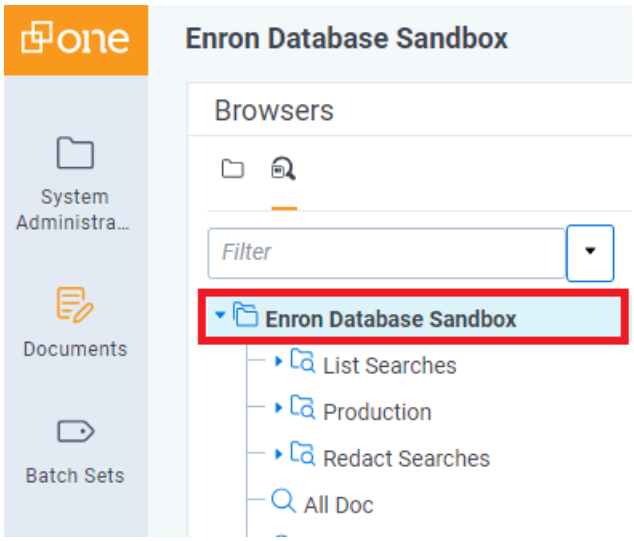
1. Log in to Relativity, then select the workspace you want to work with and click the **Documents** tab.



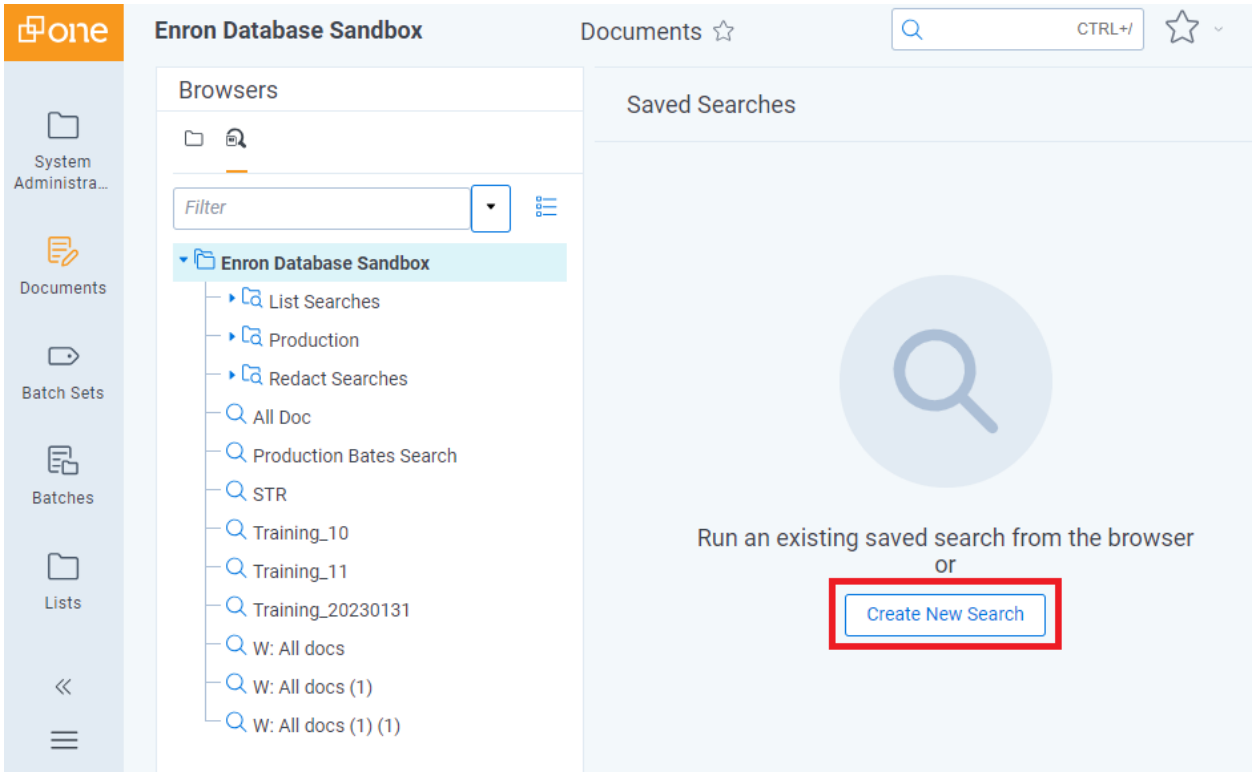
2. Click the Saved Searches icon above the browser.



3. In the Saved Searches browser, ensure you are at the top level folder.

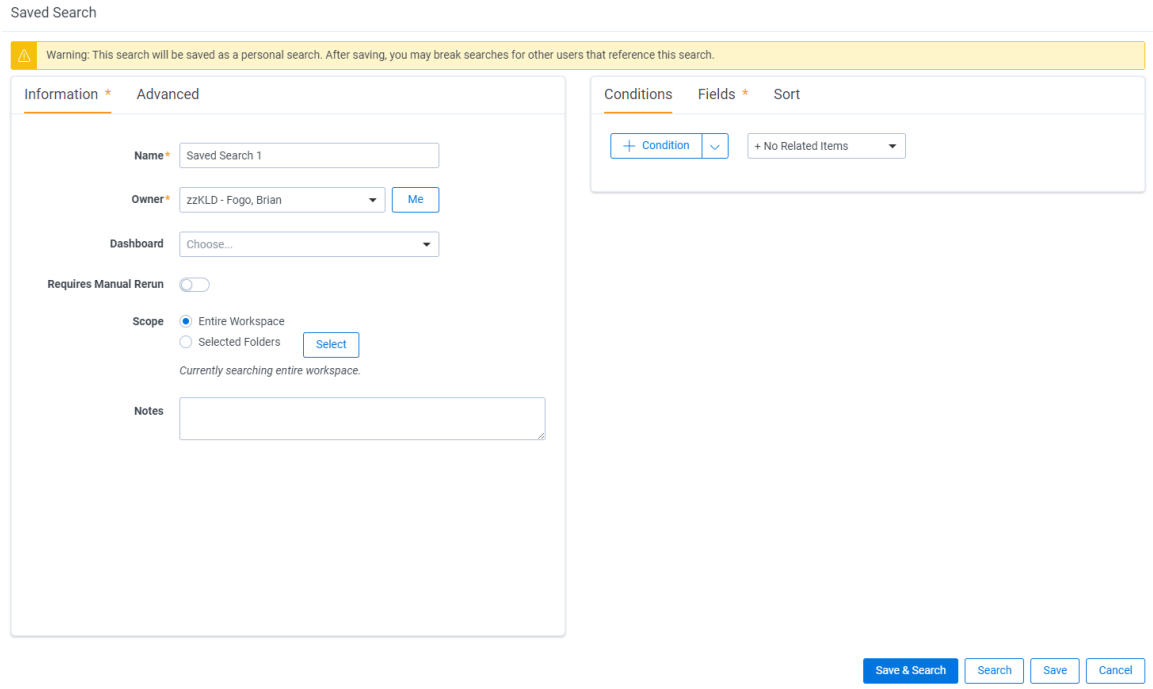


4. Click **Create New Search** to open the New Search page.

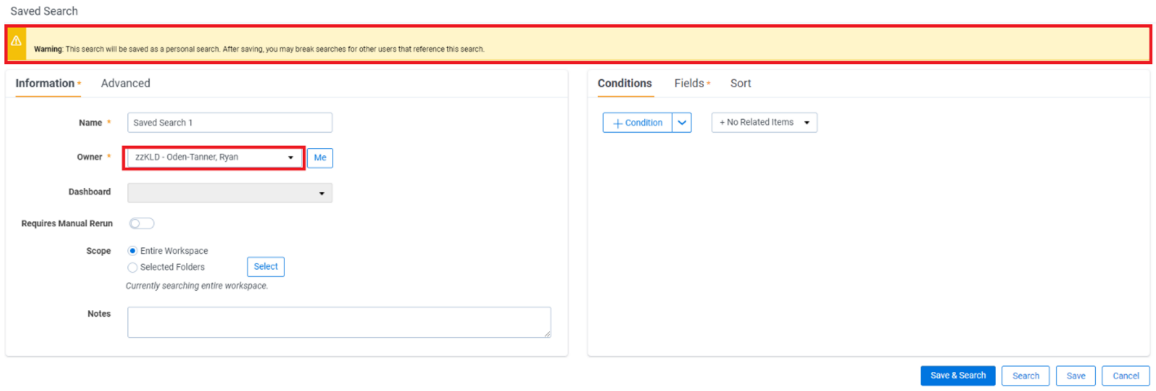


Information tab

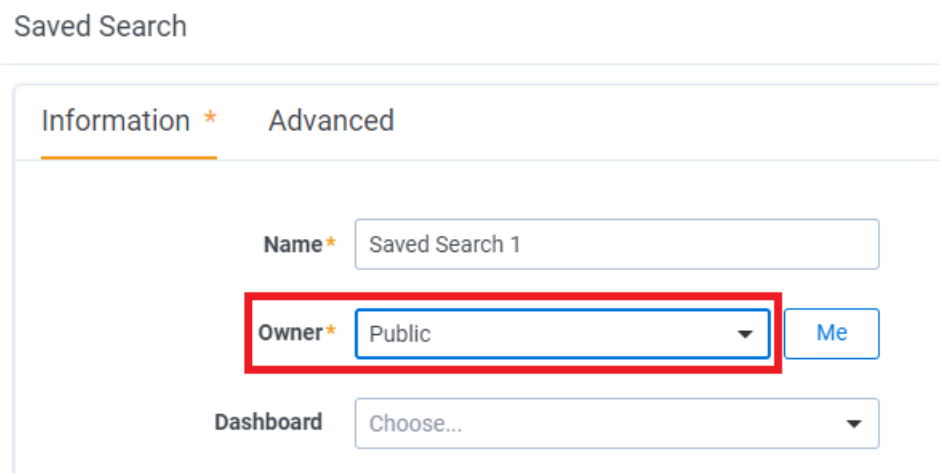
Set the name and scope of the new search in the Information tab.



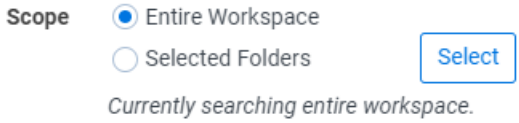
1. Enter the **Name** of the new search.
2. In the **Owner** drop down, note the search is secured to current user by default.



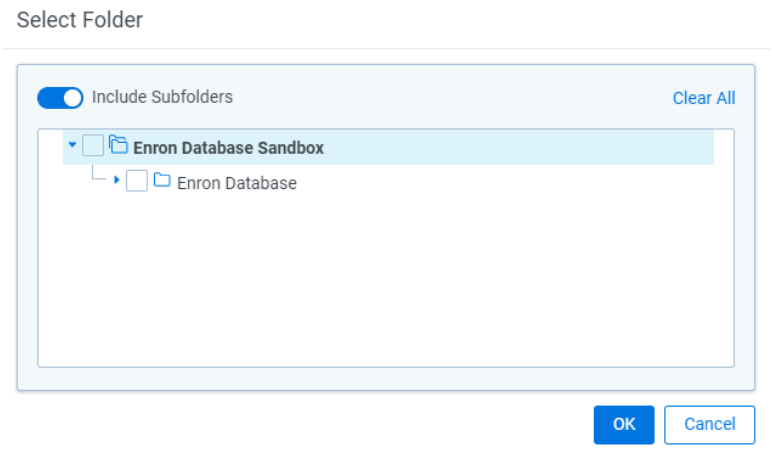
To make the search viewable to all, select **Public** (the first listing).



3. Choose the **Scope** by selecting either:
   - **Entire Workspace** for all documents.
   - **Selected Folders**, then clicking **Select** for documents in specific folders.



On the Select Folder window, select the folders that you want to search (subfolders are automatically included when a parent folder is selected), then click **Ok**.



To exclude subfolders, clear **Include Subfolders**.

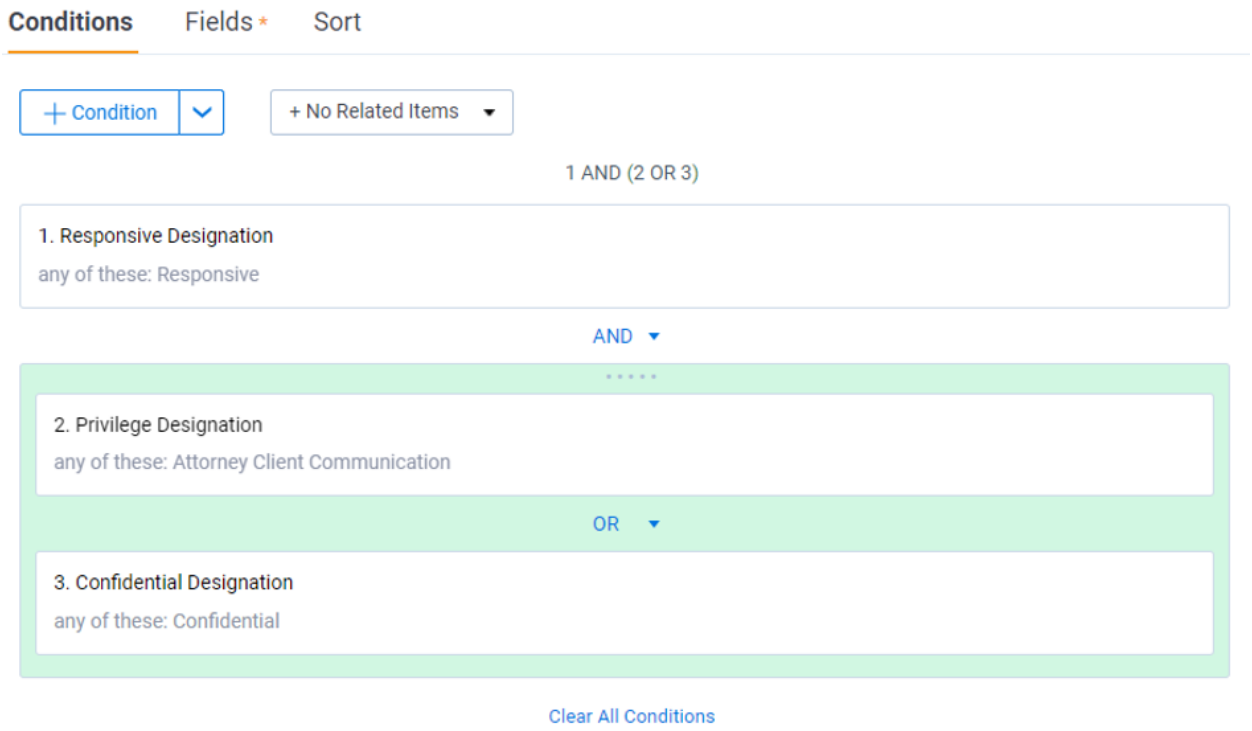
Conditions subtab

Use the Conditions sub tab to select from the following types of conditions to define the search criteria:

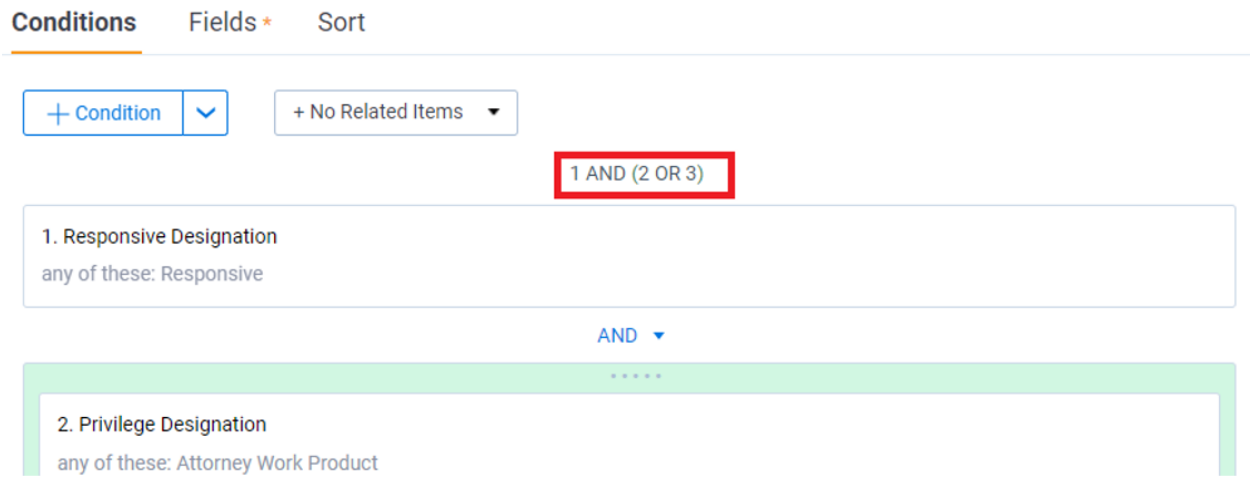
- **Index Search**: Keyword, dtSearch, or analytics.
- **Saved Search**: An existing saved search for use in search criteria.

- **Field Search**: An object field name.

Each condition is numbered and appears on its own card. The search criteria example below consists of three conditions (conditions 2 and 3 are in a logic group).



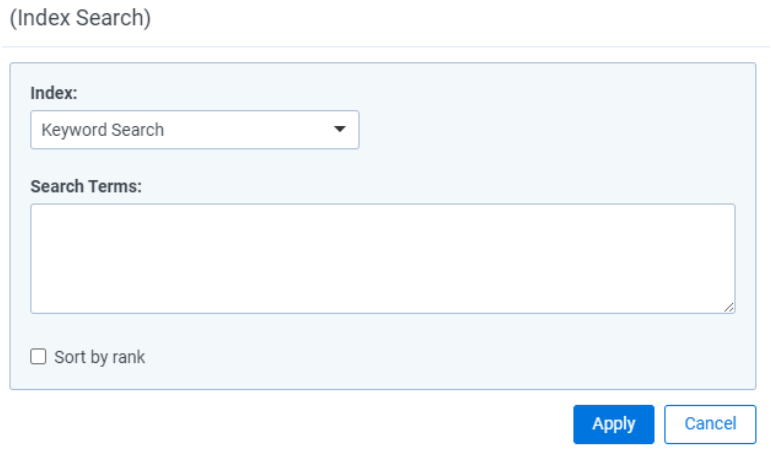
A summary of the search criteria appears above the cards.



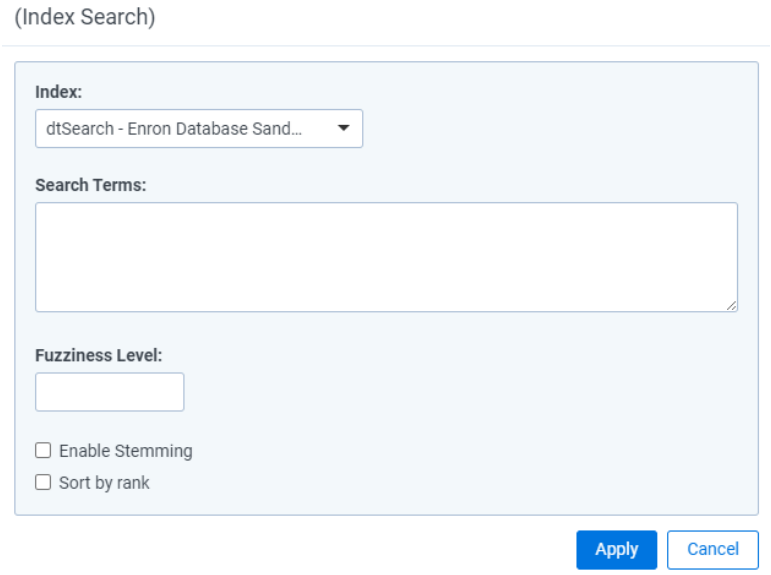
To add an Index Search condition

1. Click **+ Condition** and select **(Index Search)**.

   To perform a search similar to that conducted by an internet search engine, select **Keyword Search**. (Keyword Search support Boolean operators AND, OR, and NOT).



   To perform a more complex search (such as words within proximity of each other or grammatical variants of words), select **dtSearch Index** (Recommended. Requires a dtSearch Index, not created by default).



   The dtSearch engine allows the use of special characters and other operators to define search criteria. The following table summarizes the common syntax options available for queries in a dtSearch index.

Special characters or operators	Search functionality
AND, OR, NOT	Boolean operators.
?	Wildcard, matches any single character. **Example**: `r?n` returns "`ran`"," `run`"
*	Wildcard, matches any number of characters. **Example**: `app*` returns "`applies`", "`apples`", "`apparent`"
W/N (or WI)	Locates words within a defined number of words (where N represents the number). **Example**: "`lawyer W/4 doctor`" returns "`lawyer was contacted after seeing doctor`" ***Note:*** *"`lawyer WI4 doctor`" produces the same returns.*
%	Fuzzy searching. Returns documents containing spelling variations.
~	Stemming. Returns documents containing grammatical variations of a root word. **Example**: `apply~` returns "`apply`", "`applying`", "`applies`"

2. Enter the **Search Terms** you want included in the search criteria.

   Examples

   When searching for multiple text strings, include and capitalize the Boolean operators.

   Example: clear AND present

   When searching for exact phrases, use quotation marks " " around the phrase.

   Example: "clear and present danger"

   When creating complex searches, use logic groups (represented in the following as parenthesis).

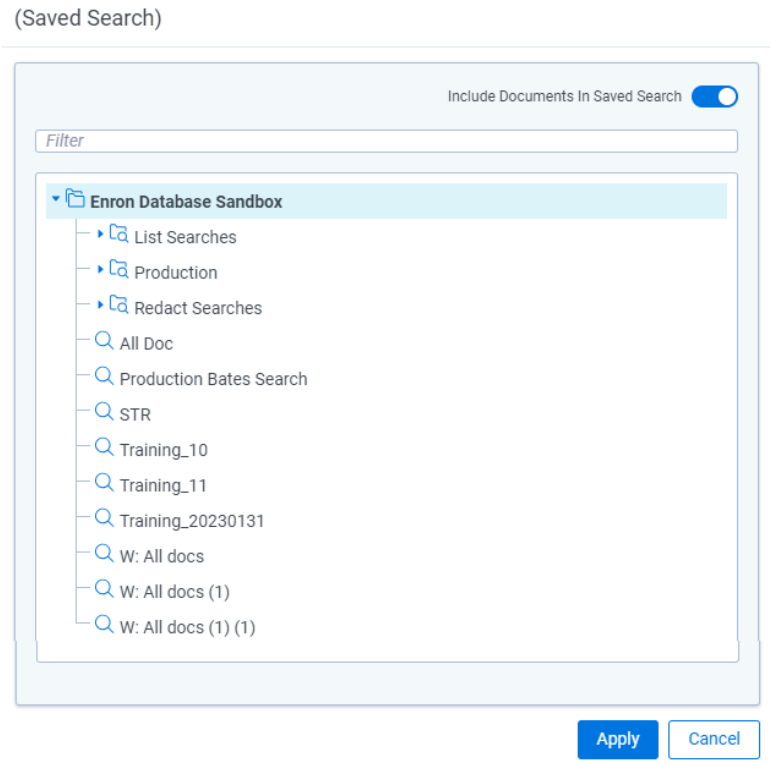
   Example: (four w/3 score) AND (apple w/3 pie)

   Example: apple AND (banana OR Pear)

3. Click **Apply**.

To add a Saved Search condition

1. Click **+ Condition** and select **(Saved Search)**.



2. Select the saved search and how you want to **Included Documents in Saved Search**.
3. Click **Apply**.

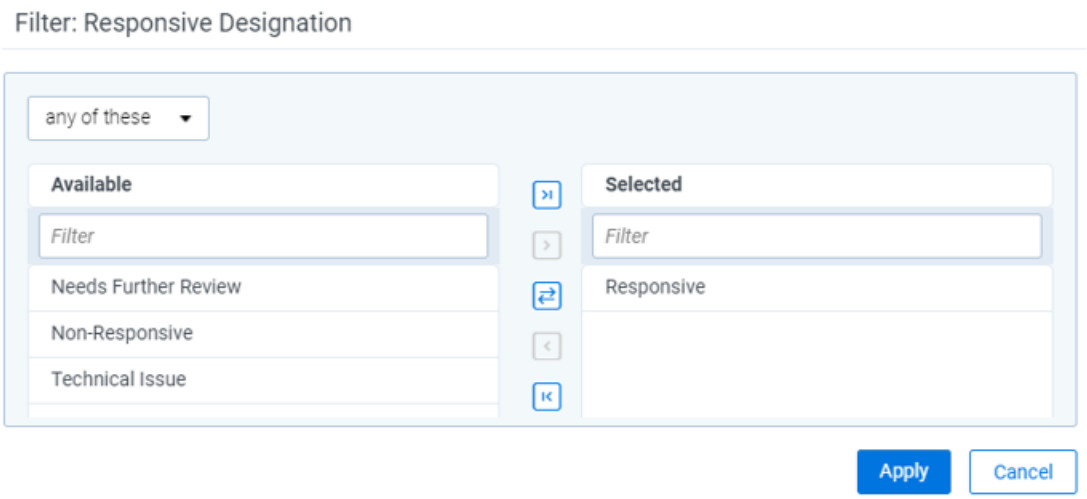
To add a Field Search condition

1. Click **+ Condition** and select **<field name>**.

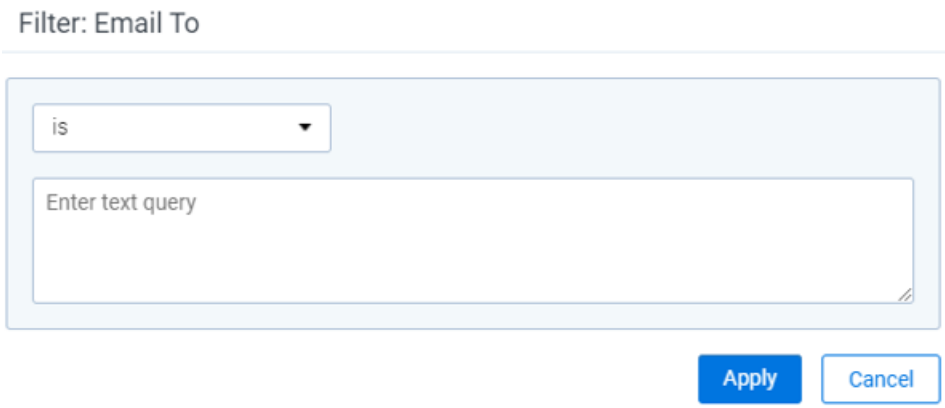
   Note: *The corresponding Filter window differs in content depending on the selected condition field.*

   Examples

   Filter window for `Responsiveness`.



Filter window for `Email To`.



2. Select the **Operator** used to search the field. (Each Field has a set of available Operators.)

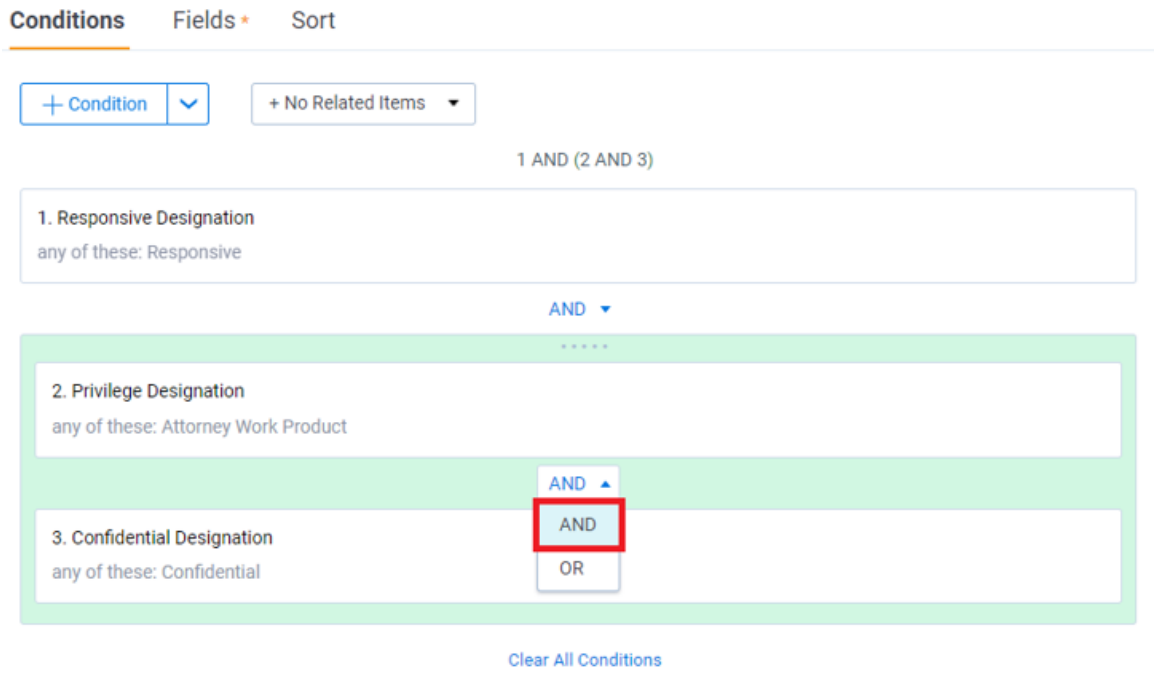
Operator	Description
Any of These	Any of the choices that apply to the criteria.
None of These	Search for everything but the criteria.
Is Set	If the choice is marked, regardless of which choice is marked, will search on that field.
Is Not Set	Records that have the specified field are not marked with the choice.

3. Complete the Filter: <name> window and click **Apply**.

To edit operators between conditions

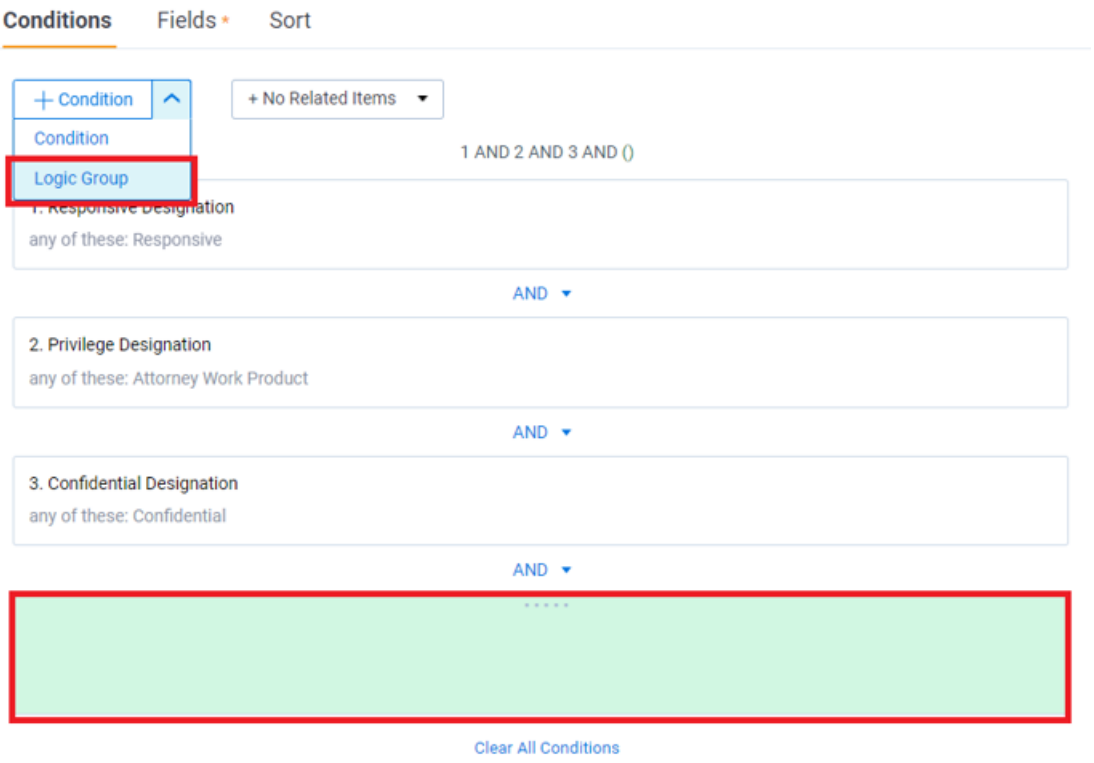
1. Create the conditions of the search criteria.
2. Click the operator and select AND or OR.

- **AND**: All criteria must be met.
- **OR**: Any of the criteria can be met.



To create a logic group

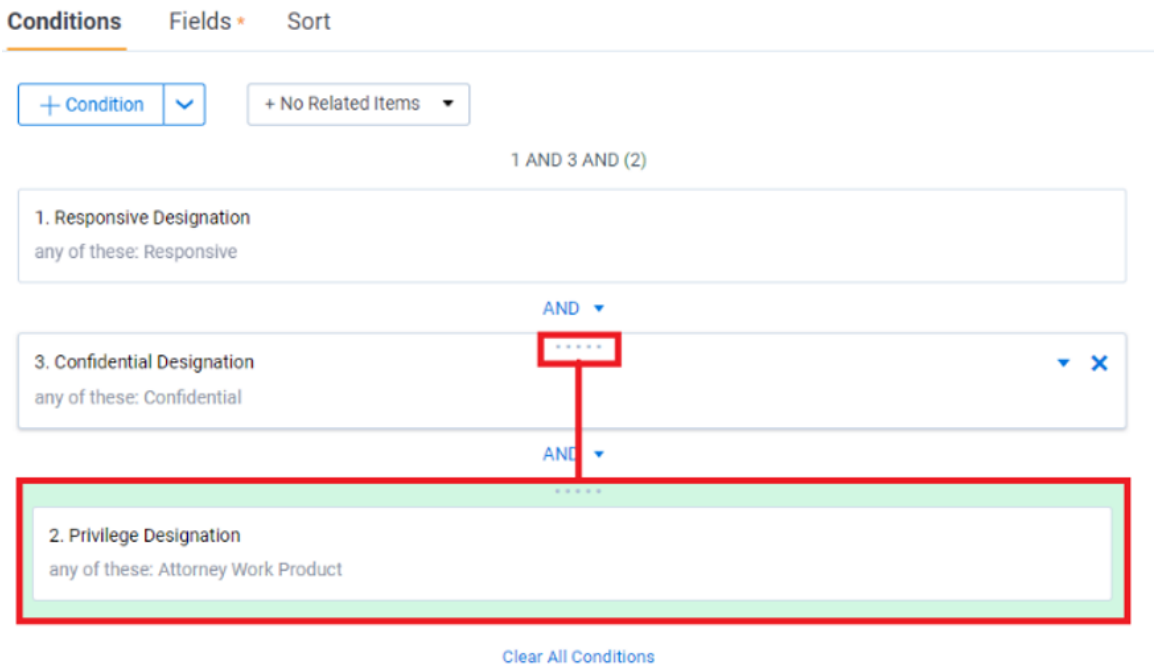
1. Create the conditions of the search criteria, then click the **+Condition** drop down list and select **Logic Group**.



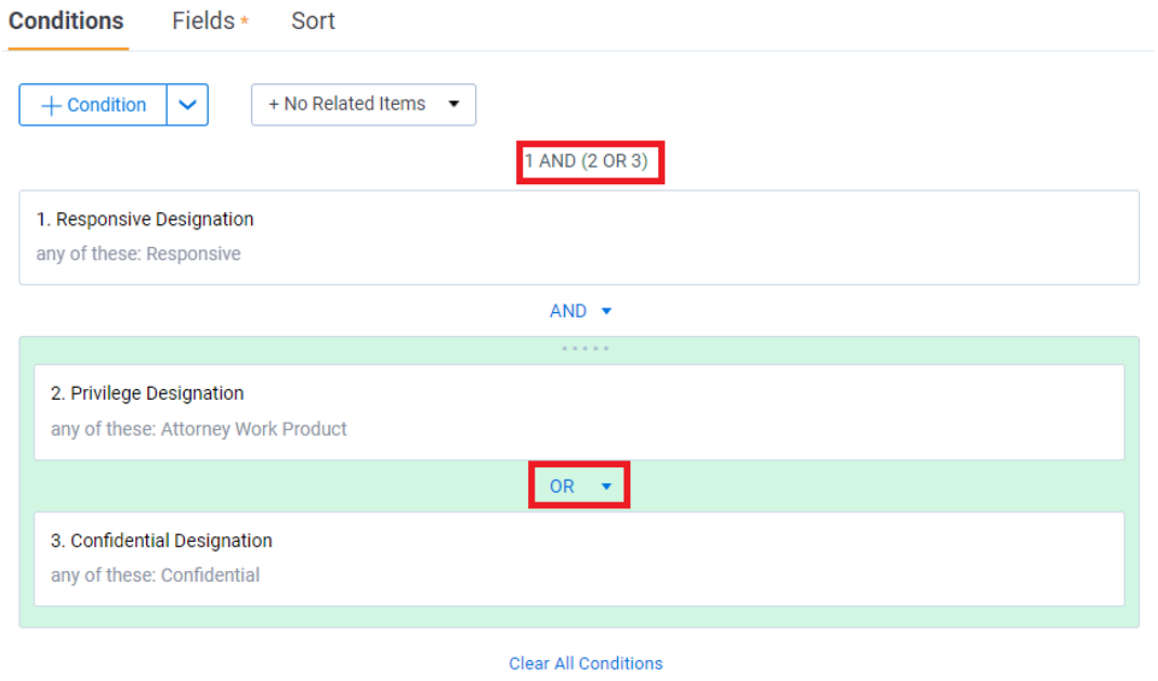
2. Drag and drop the top center of the condition to logic group frame.



3. Repeat step 2 to include other conditions in the logic group.



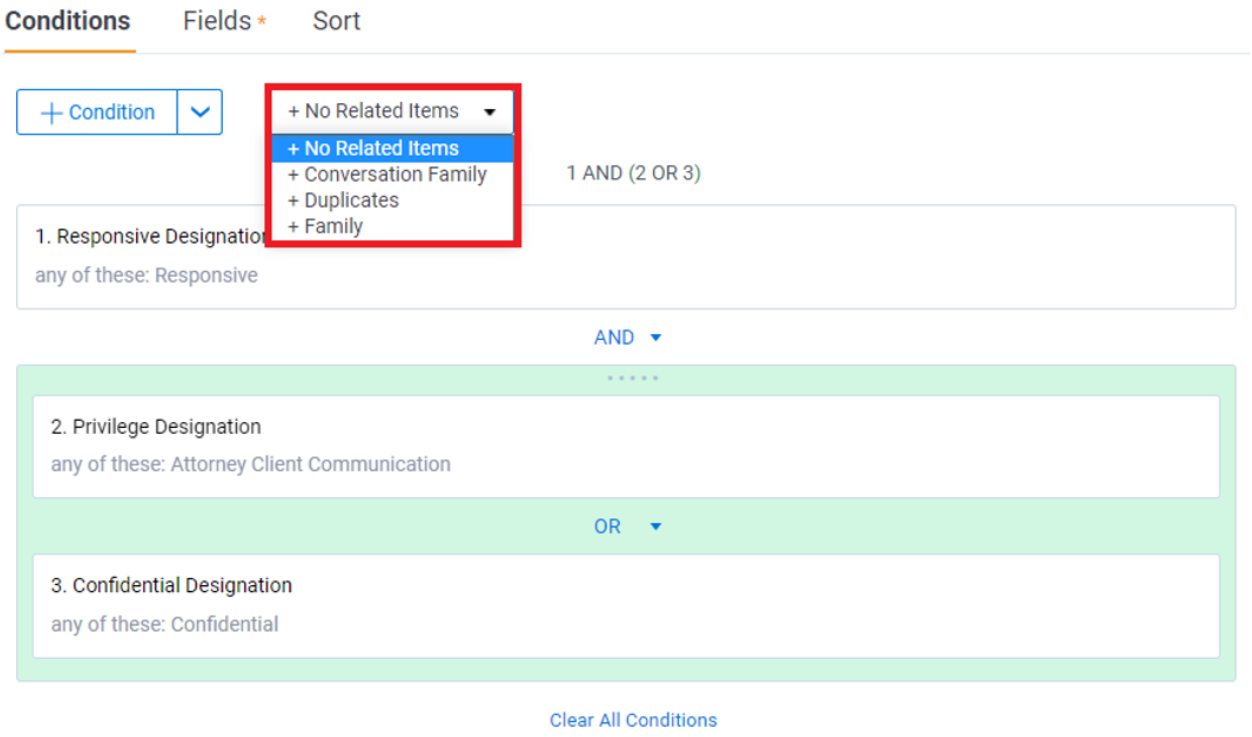
4. Change the operator in the logic group as necessary.



To choose documents included in search

- In the unlabled **+No Related Items** drop down list, select the documents to include in the result set.

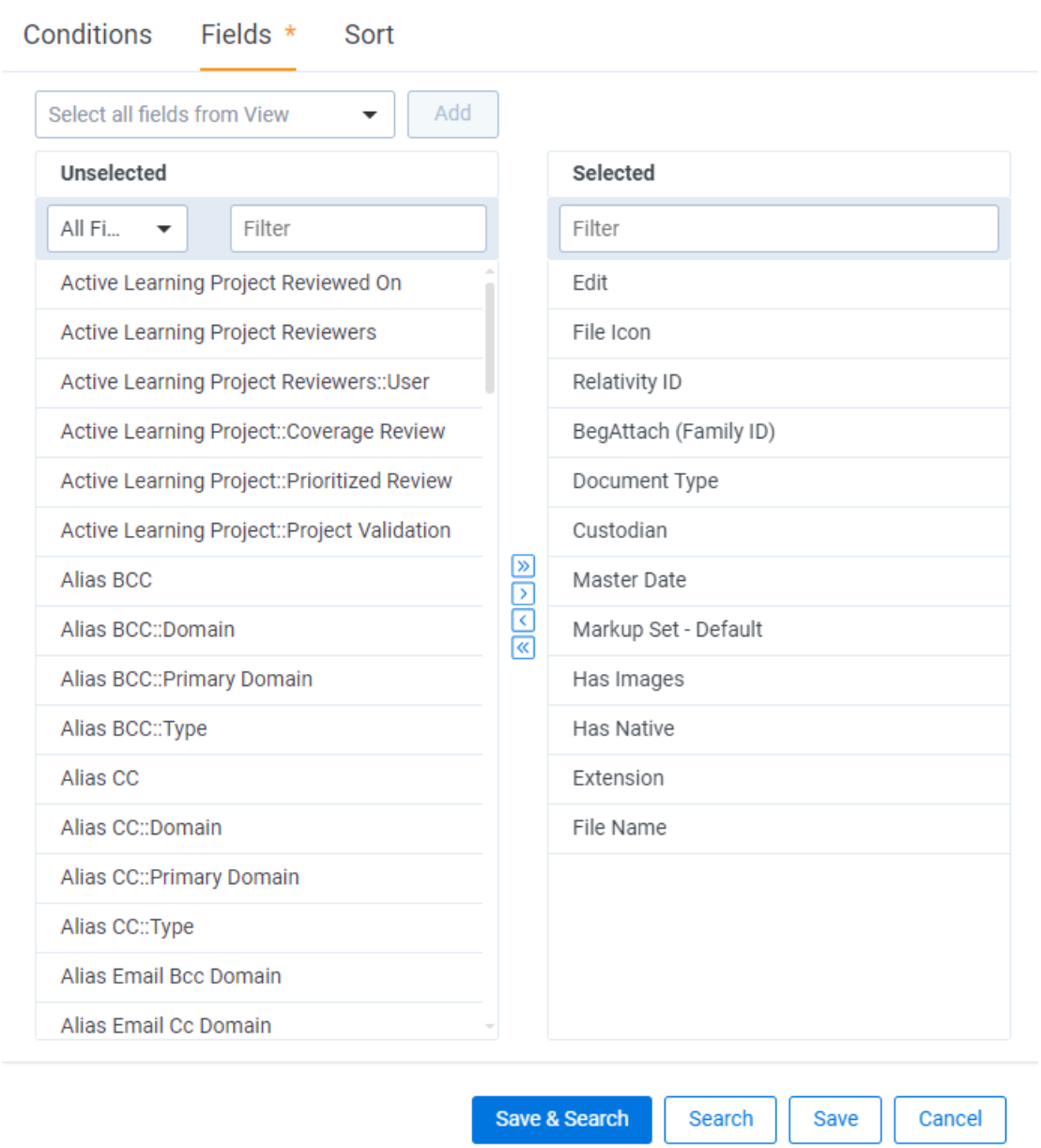
  Note: *These documents may not match the search results.*



Fields subtab

Using the right box in the Fields section, choose which fields appear in your search results (as well as their order).

Note: *All workspaces have a default search view that can be modified.*



1. In the left box, select the field you want to include, then click the right arrow to move that choice over to the right box. Use the following as needed:

   Move selected field from right box to left box.

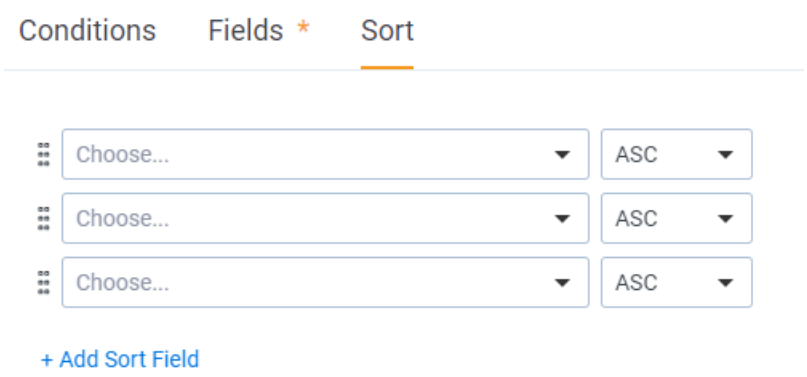
   Move all fields from right box to left box.

   Move all fields from left box to right box.

2. In the right box, arrange the fields in order of appearance by clicking and dragging within the list.

Sort subtab

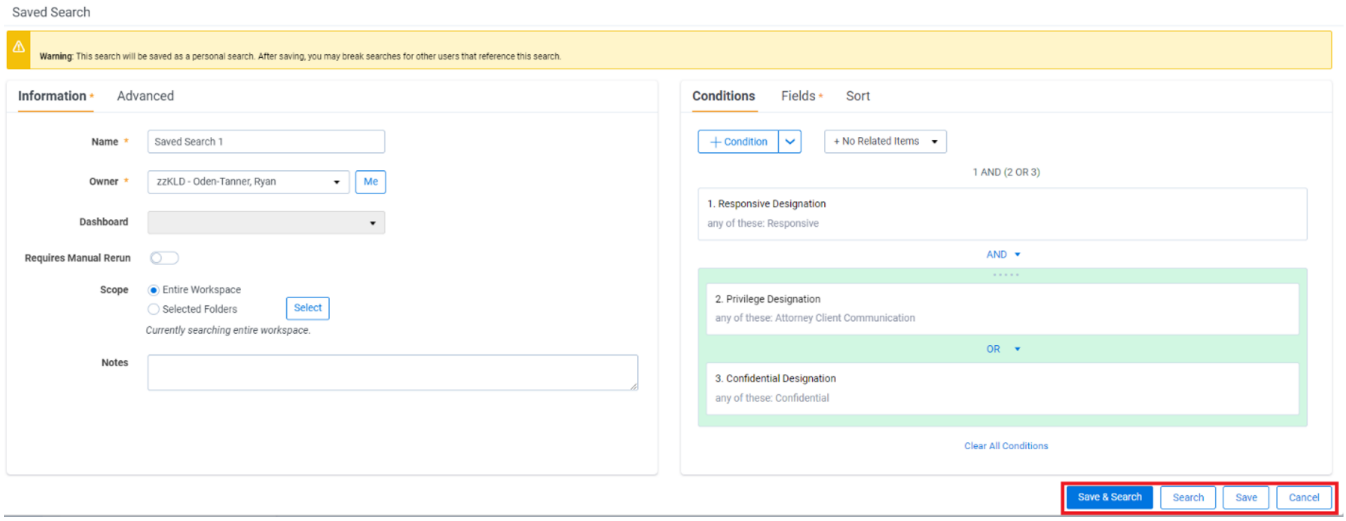
Use the Sort subtab to select the fields used to arrange the search results, as well as the sort order.



1. In the left drop down, select the field you want used to sort the search results.
2. In the right drop list, select the sort order, either ascending (ASC) or descending (DESC).

Searching and Saving

When finished defining the search criteria, choose the type of search you want to perform by clicking one of the following:



Click...	To...
Search	Perform the search and display (but not save) the results.
Save	Save the search criteria in the Saved Searches browser without performing the search.
Save & Search	Perform the search and save the results in the Saved Searches browser.

Note: *If you have any further questions, please contact the TechQ department at techq@kldiscovery.com or your Project Manager.*