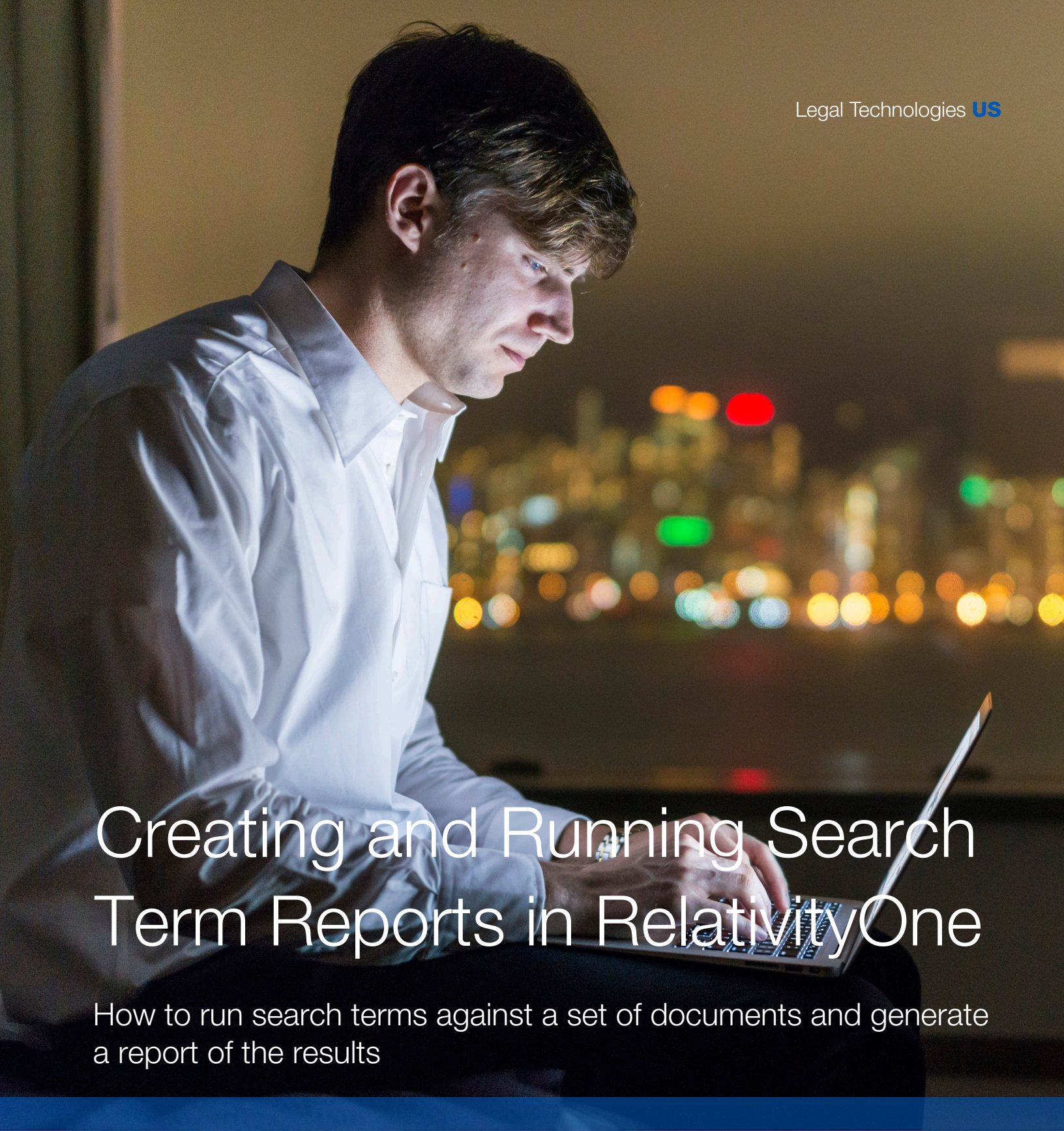


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Creating and Running Search Term Reports in RelativityOne

How to run search terms against a set of documents and generate a report of the results

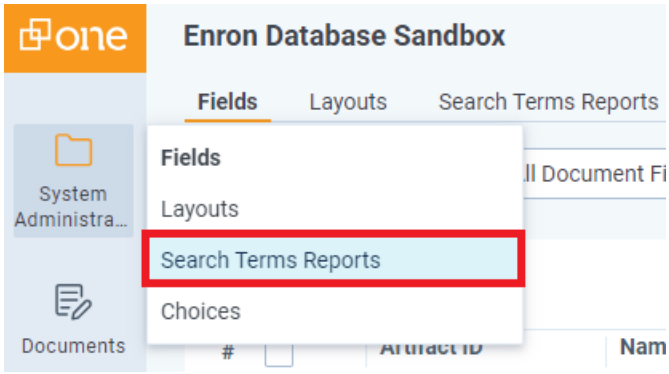
KLDiscovery™

Creating and Running Search Term Reports in RelativityOne

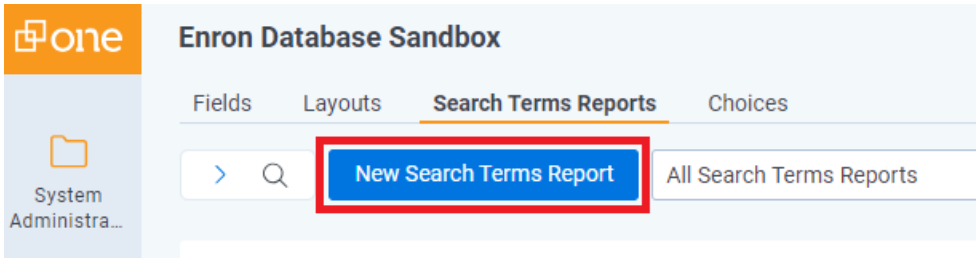
A search term report (STR) runs a list of search terms (words and strings) against a saved search of documents. This set of documents an STR is run against can be all documents in the database, a date range, or any other defined universe. After the STR completes running, a report can be generated of the results.

To create a new search term report

1. After selecting your workspace, click the **System Administra...** tab and select **Search Term Reports**.

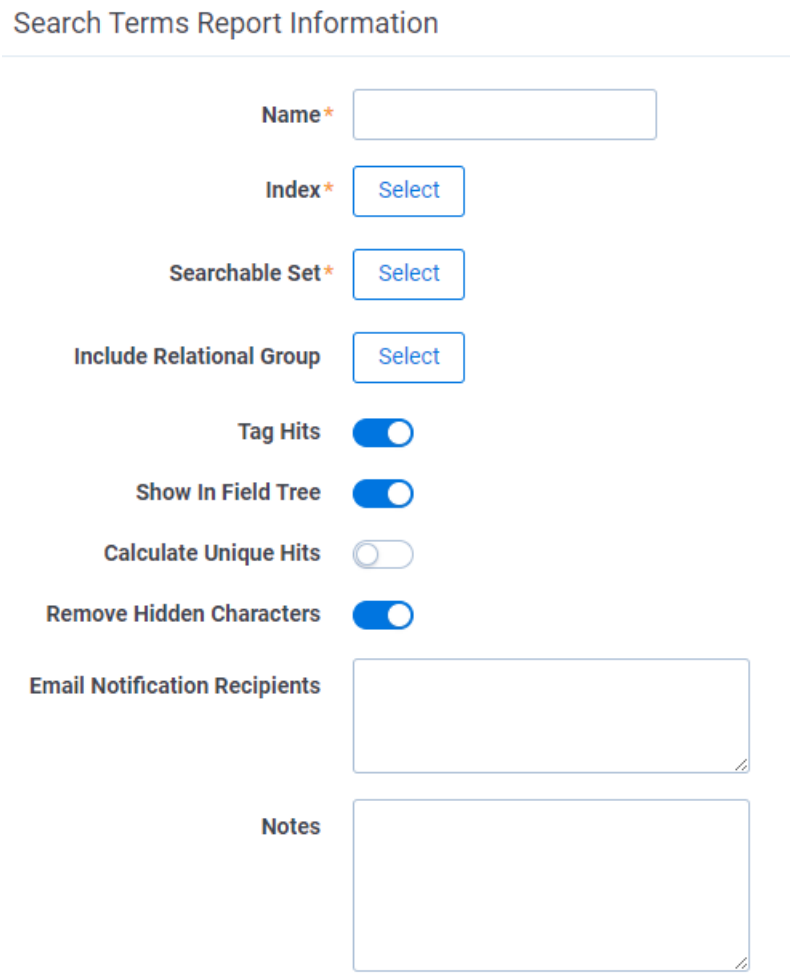


2. On the System Administrators > Search Terms Reports page, click **New Search Terms Report**.



3. Complete the following fields on the Search Terms Report Information page:

   Note: *An orange asterisk indicates the field is required.*

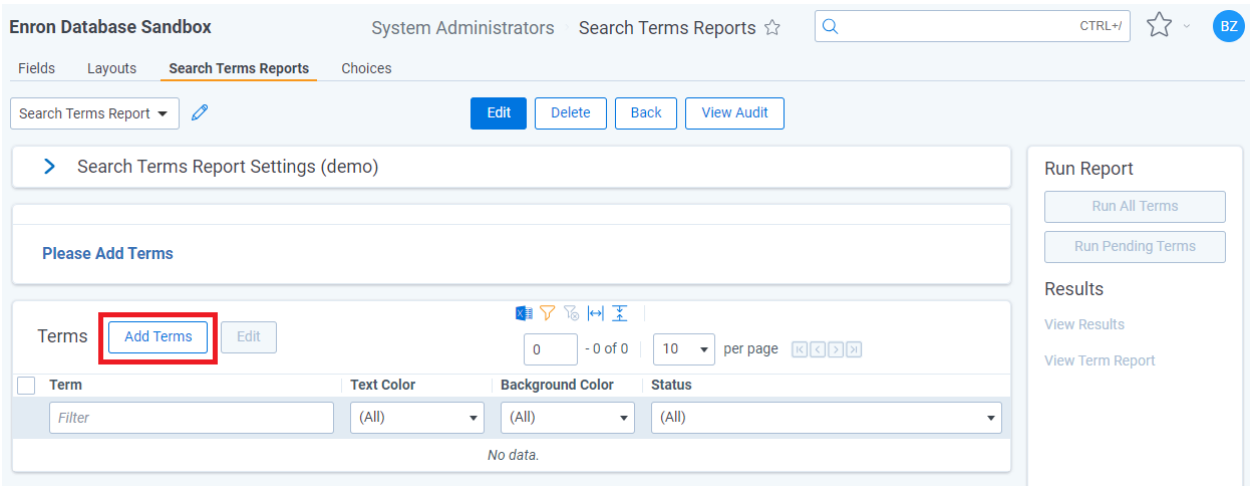


- **Name**: Enter the search term report's name.
- **Index**: Select the DTSearch index you want to search against.
- **Searchable Set**: Select a saved search upon which this STR will be run.
- **Include relational group**: If you want to include a relational group for a count of documents and their family members, click **Select**. On the Select Item - Searchable Set dialog box, select a relational group and click **Set**. (The relational group appears as a separate column in the report.)
- **Tag Hits**: Select to create a new field with the prefix "STR". This field will be named after the STR and can be used for review, such as when searching or filtering.
- **Show in Field Tree**: If enabled, includes the results of the STR in the Field Tree.
- **Calculate Unique Hits**: If selected, includes a column in the STR results with the number of unique hits a term has. (A unique hit is when only that term is found in a given record. If more than one STR term is found in the record, that would not count as a unique hit.)
- **Remove Hidden Characters**: If selected, omits hidden or non-displayable characters when creating or editing STR terms.

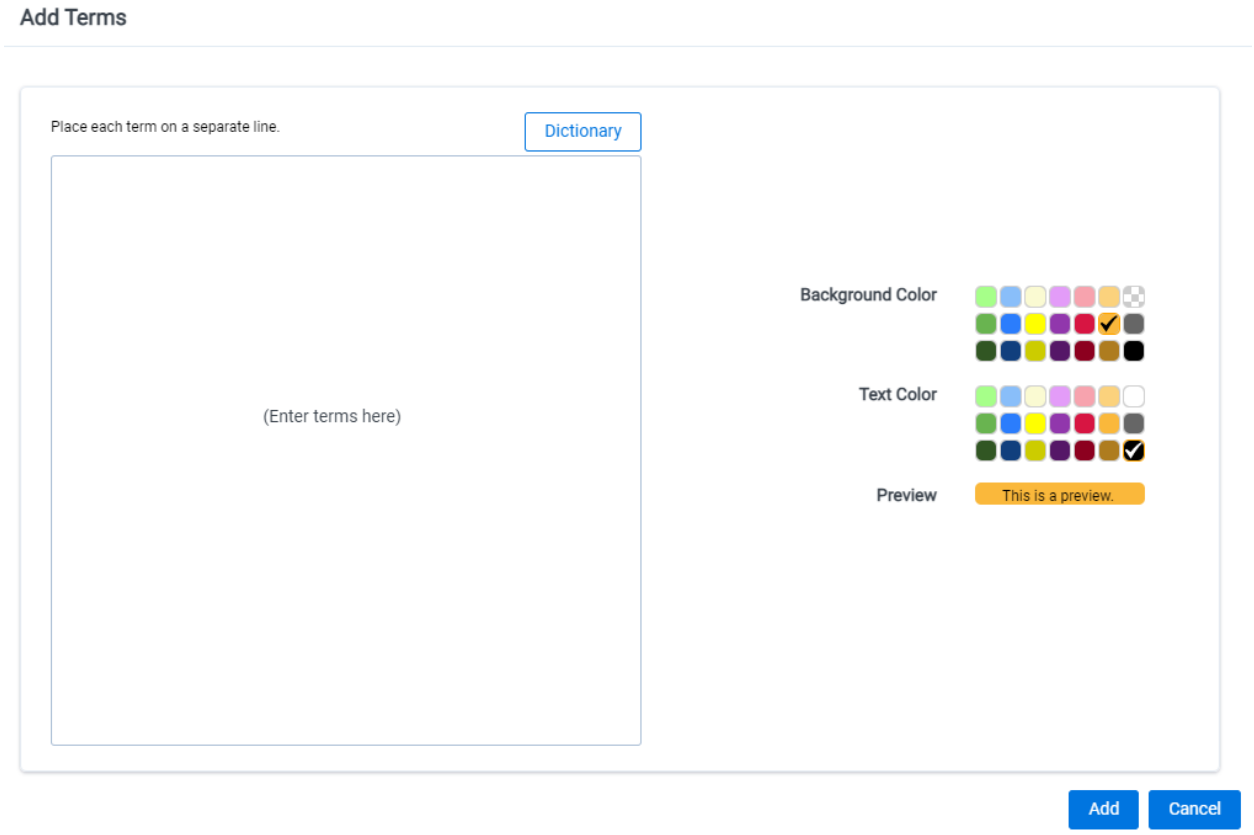
- Hidden control characters are sometimes included in Word or Excel documents and can cause searching issues within the workspace.
- The characters that are filtered are identical to those found in the default ignore section of the dtSearch alphabet file text.

- **Email notification recipients**: *If you would like an email alert when the STR has completed*, enter the email addresses of the recipients. (Use a semicolon to separate email addresses.)
- **Notes**: Enter any additional test you want included in the STR.

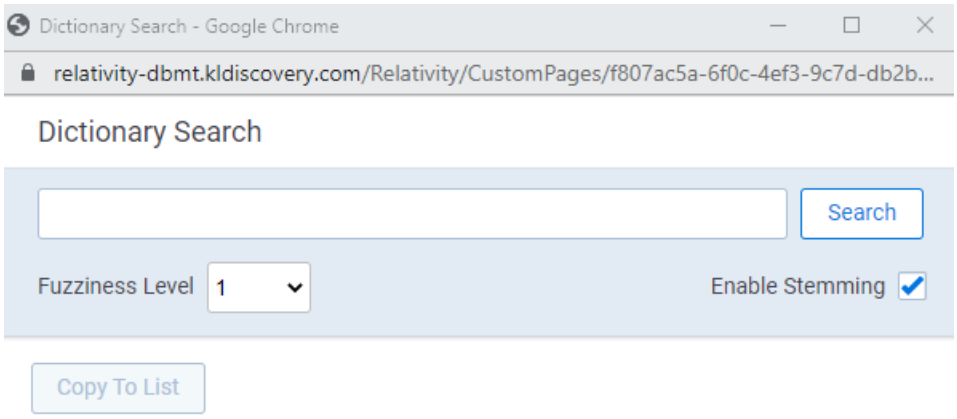
4. Click **Save**.
5. On the Search Terms Report page, in the Terms section , click **Add Terms**.



6. On the Add Terms dialog box, enter the terms you want to run. Each individual term should be entered on its own line.



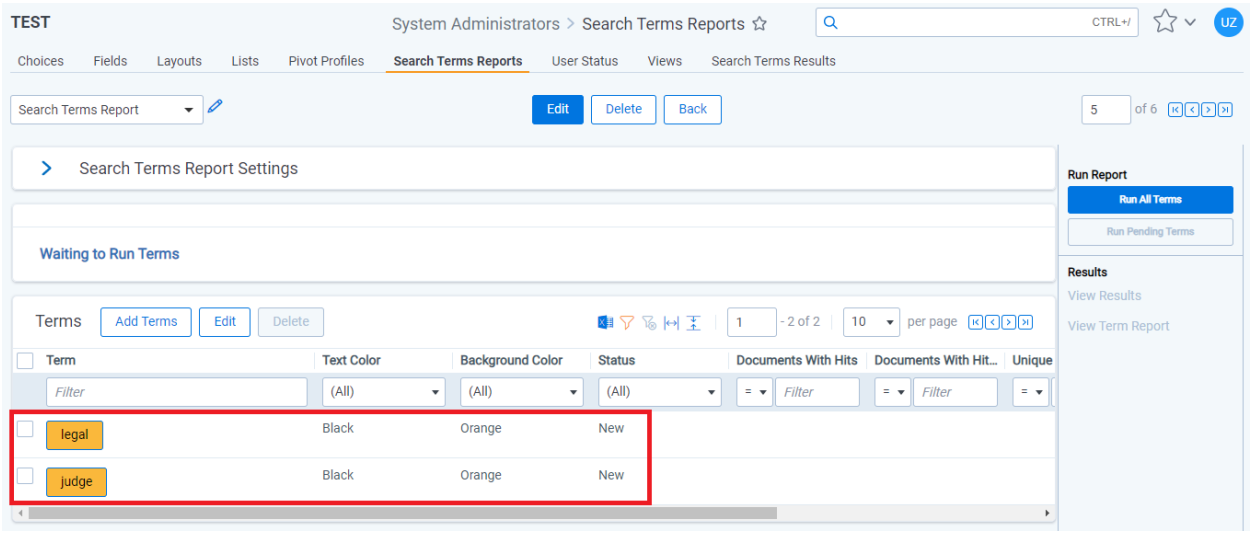
7. *To search for terms using proximity, stemming, and fuzziness*, click **Dictionary** and complete the Dictionary Search dialog box.



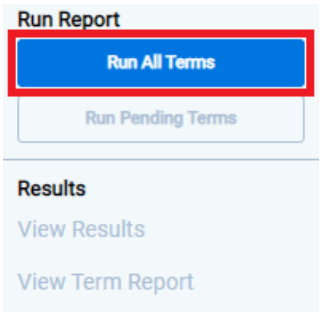
8. *To change the highlight coding of the terms*, select from the highlight color options for background and text. A preview of the highlighted Search Terms will display below the text color options.



9. When you have finished adding terms, click **Add**.
10. On the Search Term Reports page, view the terms you entered as well as the highlighting settings for the terms.

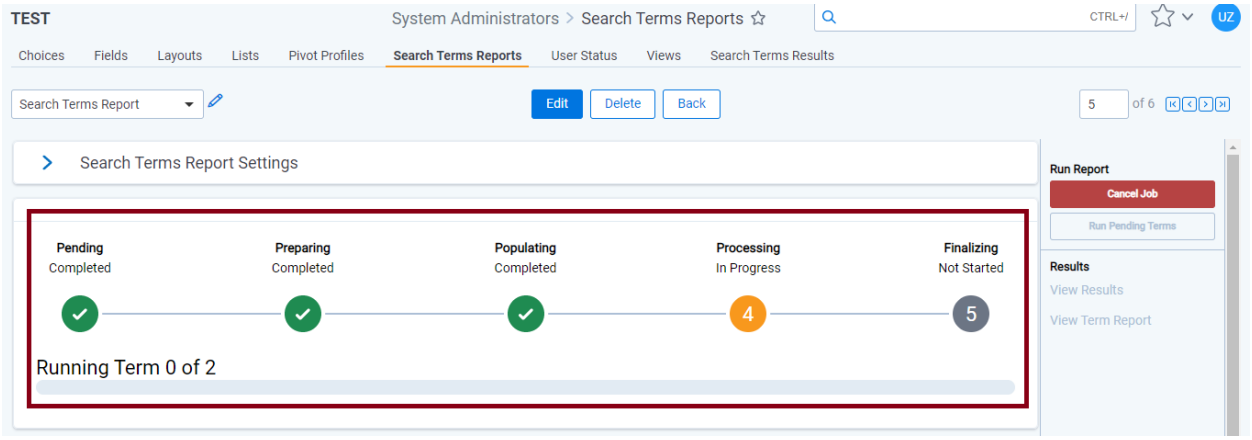


11. *To change the highlight setting for terms*, select the check box next for the terms you want to update, then click **Edit** and make edits with the Edit Terms dialog box.
12. *To remove any terms*, select the check box next for the terms you want to delete, then click **Delete**.
13. In the **Run Report** section, click **Run All Terms**.

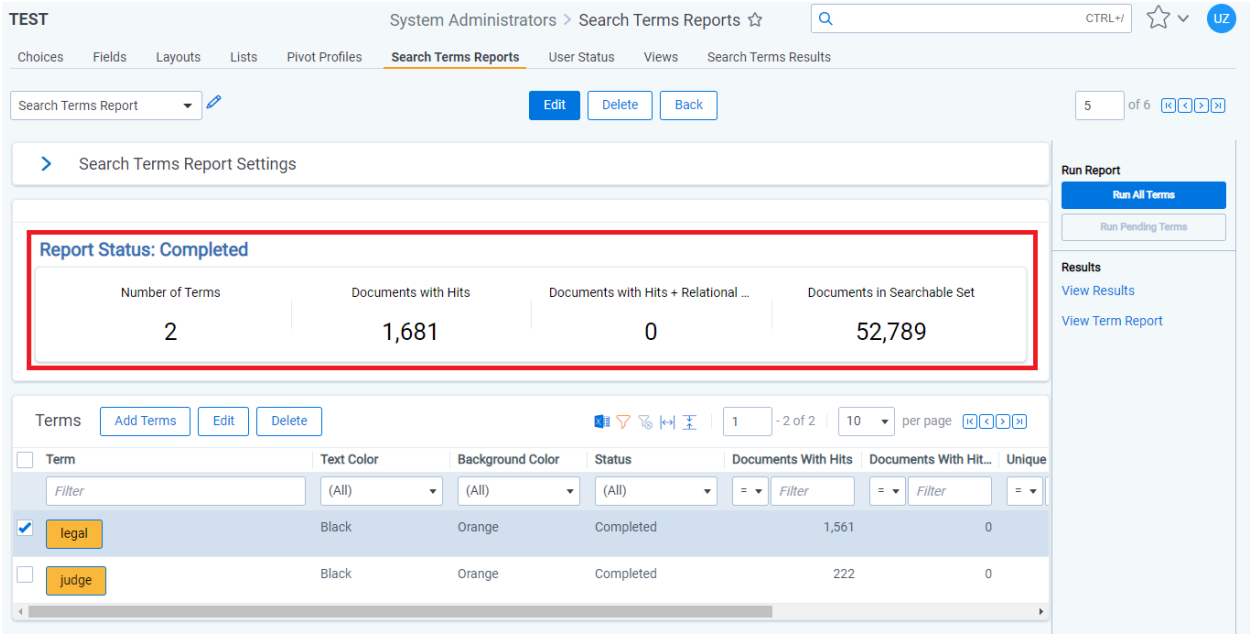


14. On the Run All Terms dialog box, click **Accept** and STR deletes all previous information stored by this report to make room for the new one.

15. View the status of the report job

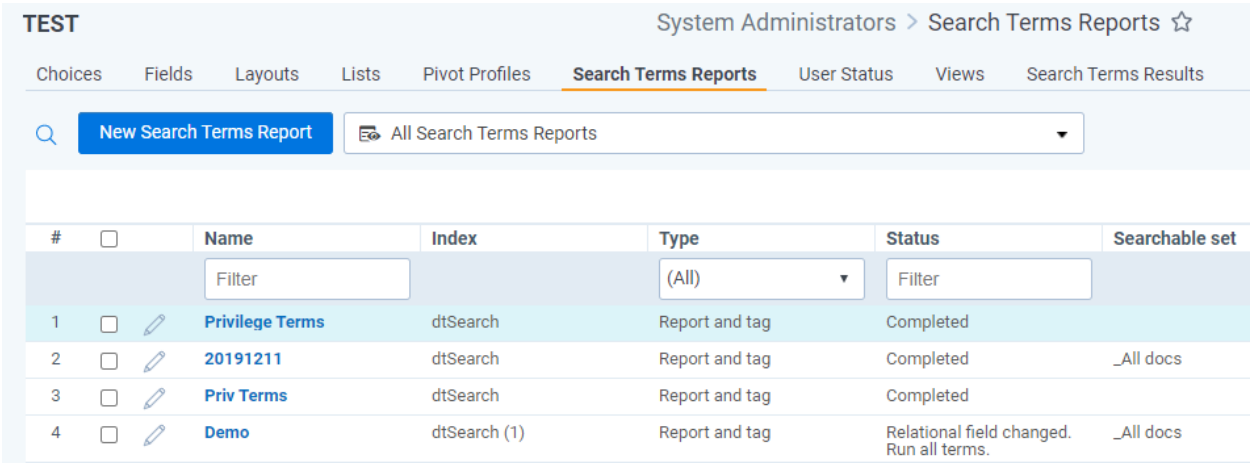


16. Vie w the completed report status.

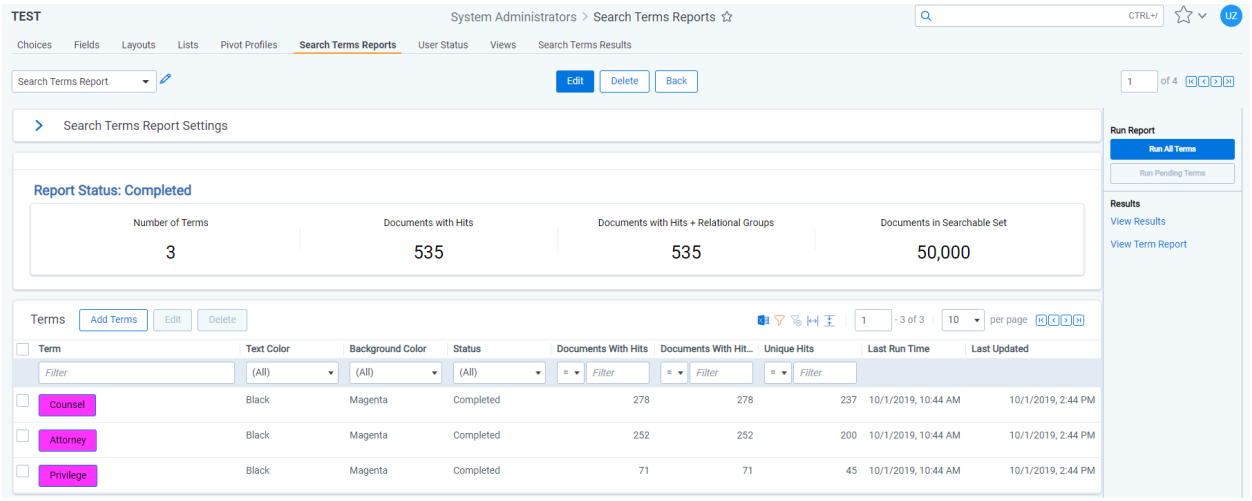


To view results of the STR

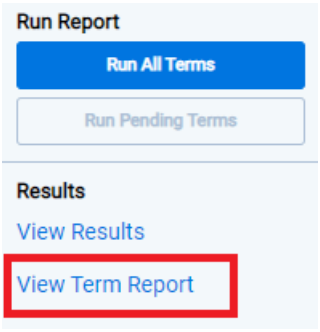
1. After selecting your workspace, click the **System Administra...** tab and select **Search Term Reports**.
2. On the Search Terms Results page, click the **Name** of the report you want to view.



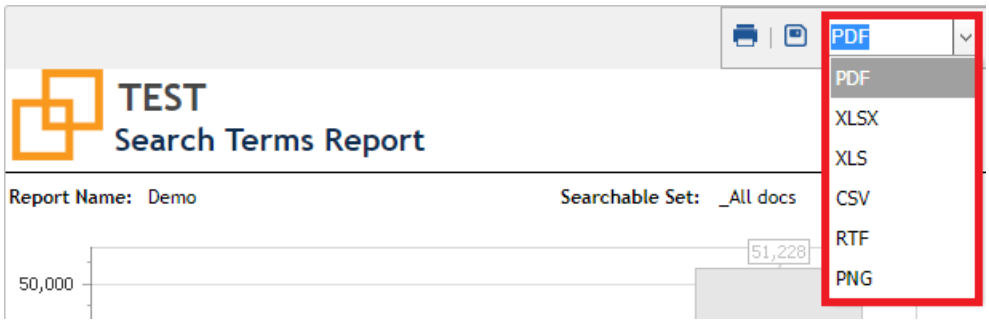
3. Details will be listed on a new screen with the name of the term, the number of hits, the number of hits by group (if selected), the number of unique hits (it selected), and the last run time of the term.



4. *To generate a report that can easily be shared with others of all the terms*, in the Run Report section, click the **View Term Report**.



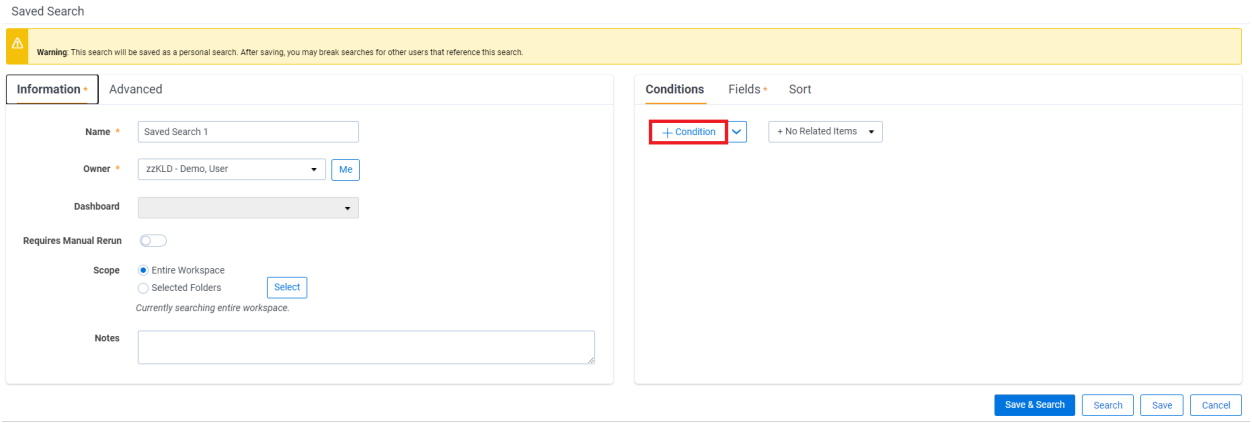
The report can be saved and printed in a variety of formats.



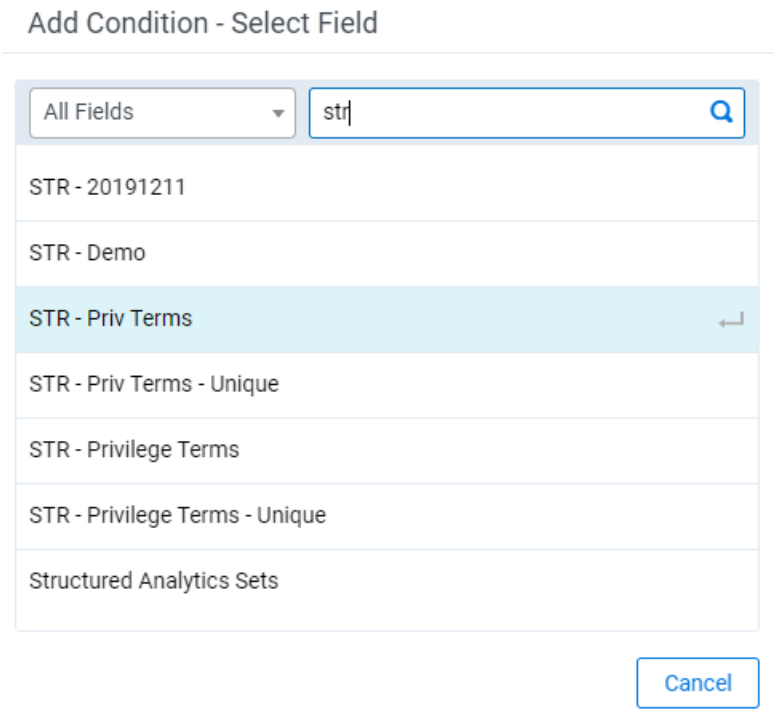
To use an STR in searching

When a STR has been created, you can use it when running searches.

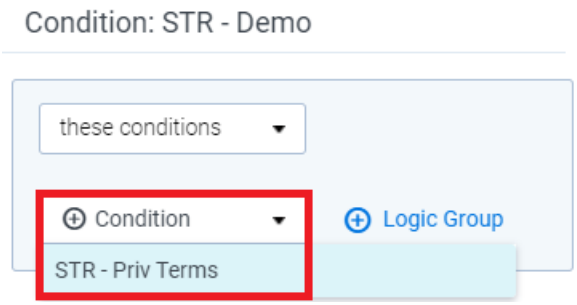
1. On the Saved Search dialog box, in the **Conditions** section, click **+Condition**.



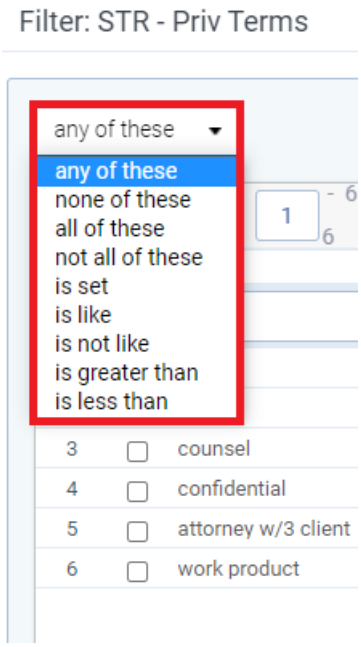
2. On the Add Condition - Select Field, select the STR you want to work with.



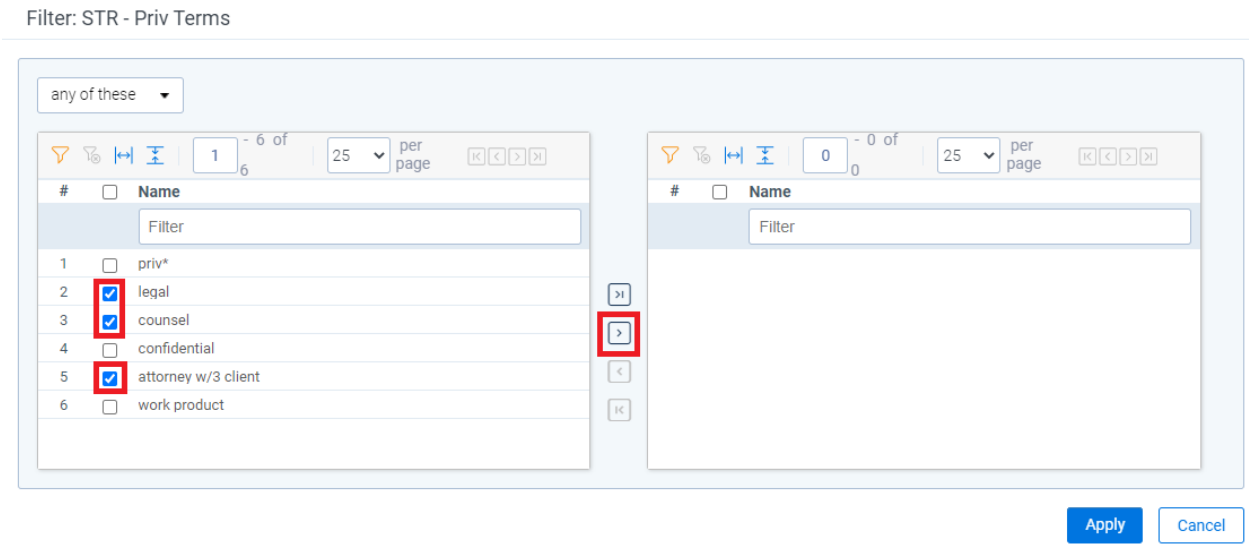
3. On the Condition: [selected STR] dialog box, click **+Condition** and select the name of the STR.



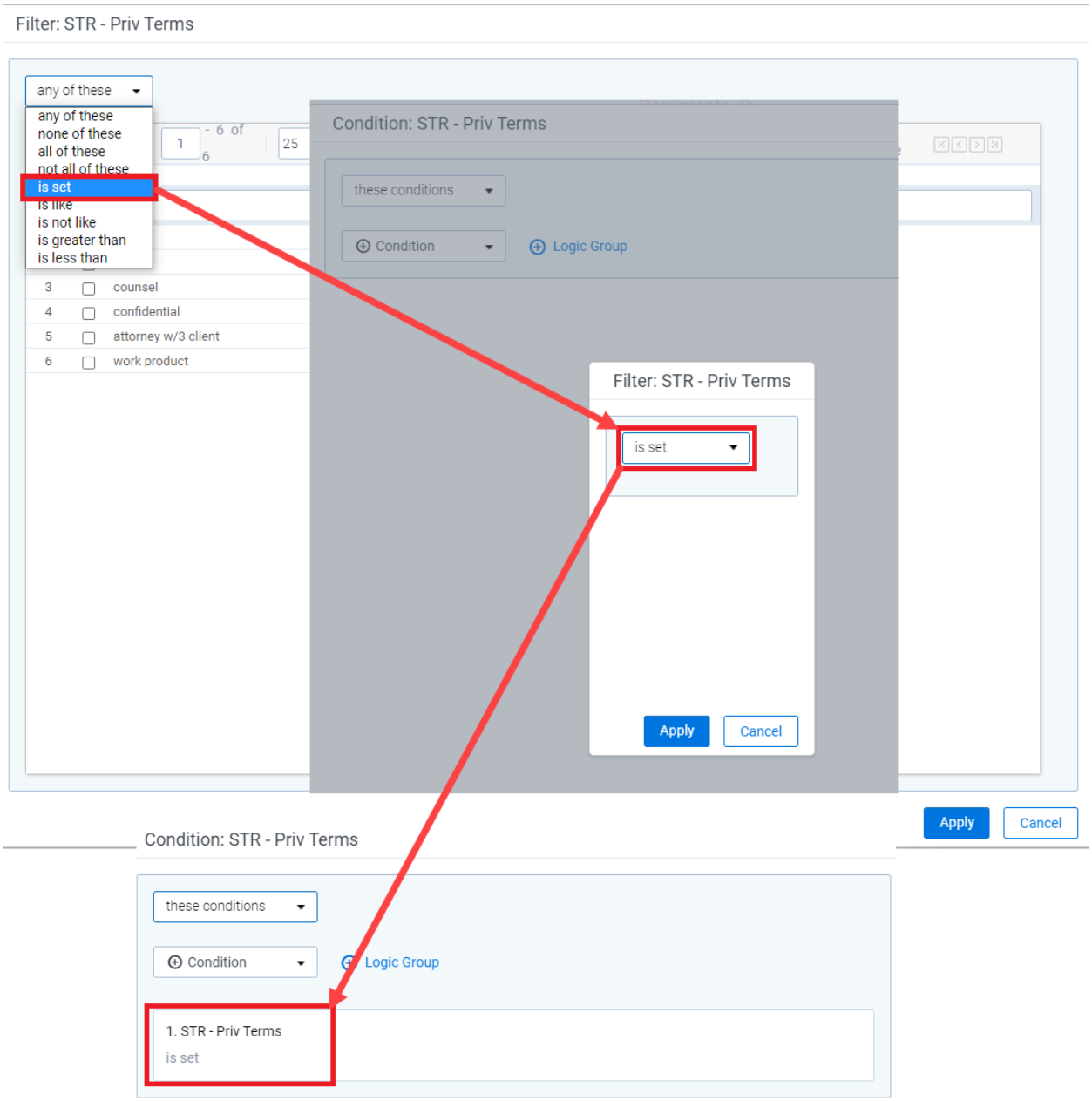
4. On the Filter: [selected STR] dialog box, choose an operator value. You can search for one term or of any combination of terms.



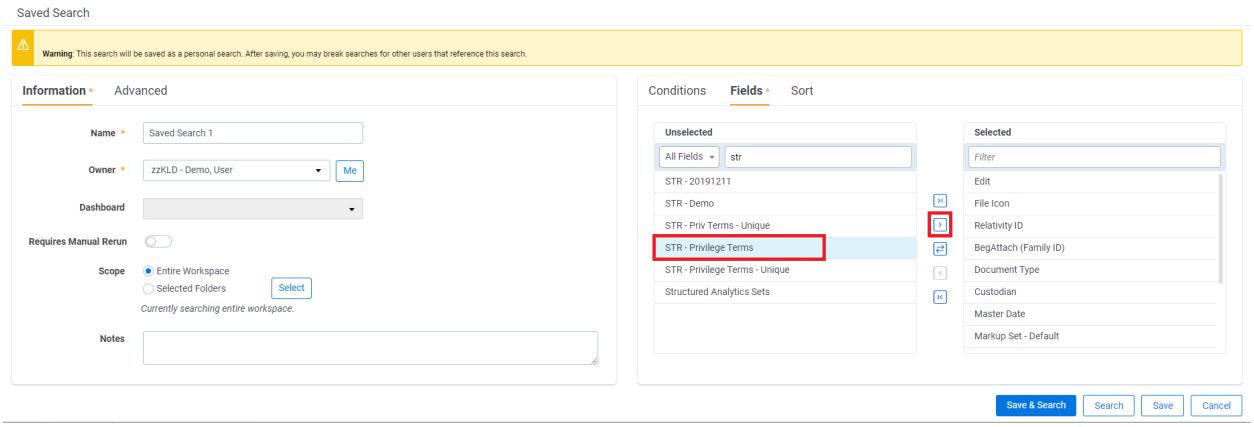
5. Check the checkbox next to each term you would like to add and use the arrows in the center of the window to move each term over to the right side.



Alternatively you can search for all items that are responsive to the STR.



6. Click **Apply**.
7. On the Saved Search dialog box, click the **Fields** tab and add the field `STR – [report name]` to the list of display fields to show in the results of your search.



8. Click **Search** or **Save and Search** to return your results.

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