Advanced search quick reference guide

When setting up a workspace in Relativity, admins need to consider what fields to search, which search indexes provide the most value, and how to optimize performance for the users, with minimal administrative overhead.

Note: This guide does not include analytics indexes and will not provide details on the operators suitable for use in these search engines.

Search type	How is it enabled?	What can be indexed?	How is it used?
Keyword Search	Relativity automatically indexes keyword searches when you load data into the system. The Active field should read Yes. (Search Indexes > Keyword Search)	Available on all fields loaded into Relativity, except long text fields stored in Data Grid. In Relativity aiR, extracted text is automatically stored in Data Grid.	In the Documents tab: 1. Click **Add Condition**. 2. Click **(Index Search)**. 3. Select **Keyword Search** from the Index drop-down menu. 4. Enter search terms. 5. Optionally, select Sort by rank. 6. Click **Apply**. See the Search quick reference guidefor more details on available search operators.
dtSearch	To access a dtSearch, you must first create a saved search. Search only on the Extracted Text field for optimal results. Next, used the saved search as the Searchable Set when creating a dtSearch index.	Available on all fields loaded into Relativity. See “Suggested Fields to be Indexed” below.	In the Documents tab: 1. Click **Add Condition** 2. Click **(Index Search)**. 3. Select **dtSearch** from the Index drop-down menu. 4. Enter search terms. 5. Optionally,

Search type	How is it enabled?	What can be indexed?	How is it used?
			select Fuzziness Level, Enable Stemming, and/or Sort by rank. 6. Click **Apply**. See the Search quick reference guidefor more details on available search operators.

Common search scenarios

Leveraging the above search index knowledge, use the matrix below to reference behavior across common search scenarios and learn suggested index tips.

Behavior	Keywords/Filters	dtSearch
Engine	SQL	dtSearch
Noise words	Yes	Yes (customizable)
Search operators	Search quick reference guide	
How to index	Search quick reference guide	
When adding data (add new records)	Automatically updates	Incremental build
When changing existing data (overlay on existing records)	Automatically updates	Full build
When removing data (remove existing records)	Automatically updates	Full build
Suggested fields to be indexed	Fixed length fields: Some long text fields with small amounts of text (ex: File Names) that are not indexed by dtSearch Index.	Long text fields (ex: Extracted Text, Email To, Email CC.)
Suggested indexes	N/A (not all fields flagged for indexing are grouped in an index.)	• One for Extracted Text • One for Email To, Email CC, Email BCC
Searching on individual fields	Yes (select the individual field to search or filter on.)	Yes (set up separate Indexes that index individual fields.)
Advantages	• Instantaneous indexing • Ability to search on individual fields	• Ability to customize index • Ability to search on individual fields; involves separate index setup
Disadvantages	• Lacks specialized search capabilities • Inability to customize indexes	Manual index maintenance

**Only available on Data-Grid-Enabled Workspaces

Is Like and *Contains* operators on field level searching

Behavior	Is Like	Contains
Behavior	Wildcard (%) is applied to the front and back of the term.	The field searches for the item entered.
Operators available	None	AND, OR, NOT, and Wildcard (%)
Multiple terms	Terms entered on multiple lines are connected by an OR.	Terms entered on multiple lines are connected by AND.
"Include in Text Index"	Field does not need to be set to "Yes."	Only available for Fixed Length and Long Text Fields and needs to be set to "Yes."
Comments	Tends to run slowly. The best practice is to avoid running on large data sets.	N/A

For example, you see the term "Valet Parking" appear the following ways using the various search operators listed below:

Term	Term	Term
"Valet parking"	Exact phrase "Valet parking"	Exact phrase "Valet parking"
Valet parking	%valet parking%	Valet AND parking
Valet park%	%Valet park%	"Valet" AND "park%"
Valet park*	%Valet park%	"Valet" AND "park*"
Valet park%%	%Valet park%	"Valet" AND "park%%"

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