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 cover Analytics indexes, nor will it detail the operators acceptable for use in each of these search engines.

Search type	Keyword search	dtSearch
How is it enabled?	Relativity automatically indexes keyword searches when you load data into the system. The Active field should read Yes. (Search Indexes > Keyword Search)	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.
What can be indexed?	Available on all fields loaded into Relativity.*	Available on all fields loaded into Relativity. See "Suggested Fields to be Indexed" below.
How is it used?	In the Documents tab: 1. Click Add Condition. 2. Click (Index Search). 3. Select Keyword Search from the drop-down menu. 4. Enter search terms. 5. Click Apply. See the Searching Quick Reference for more details on available search operators.	In the Documents tab: 1. Click Add Condition. 2. Click (Index Search). 3. Select dtSearch from the drop-down menu. 4. Enter search terms. 5. Enable Fuzziness or Stemming, if necessary. 6. Click Apply. See the Searching Quick Reference for more details on available search operators

*Except long text fields stored in Data Grid. In RelativityOne, extracted text is automatically stored in Data Grid.

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.

	Keyword/Filters	dtSearch
Engine	SQL	dtSearch
Noise words	Yes	Yes (customizable)
Search operators	https://help.relativity.com/RelativityOne/Content/System_Guides/User_quick_reference/Searching_Quick_Reference/Searching_Quick_Reference.pdf	
How to index	https://help.relativity.com/RelativityOne/Content/System_Guides/User_	

	Keyword/Filters	dtSearch
	quick_reference/Searching_Quick_Reference/Searching_Quick_Reference.pdf	
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

	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:

"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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