The Relativity Advanced & Saved Search form allows for the crafting and saving of advanced searches. In this guide we will walk you through the process of building and working with the different functions in the advanced search window. This guide is not meant to replace the existing Help Guide found in Relativity but was created to work hand in hand with that guide. For additional assistance please feel free to contact our support team at websupport@epiqsystems.com

**The Advanced Search window**
The Advanced Search window is broken down into seven (7) sections: **Saved Searches, Owner, Information, Search Conditions, Conditions, Fields (Required) and Sort.**

**Browser Saved Searches**
The Saved Searches or Browser side of the screen is a list of searches that have already been created by you or other Relativity users on your case. These searches are configured as public. From this section of the screen, depending on your access level, you will be able to Run, Edit, and Copy, a search. Right mouse clicking on a search will display the menu shown here in Figure 1. To run a Saved Search simply click on the search and the results of the search will be returned in a document list window.

![Figure 1](image)

**Owner**
The **Owner** section of the screen is where you define if the search you create will be viewable to all users or if the search will be a private search. This is also where you will have the Search and Save & Search options. Relativity support two types of saved searches Public and Private, a Public search will be viewable to all users with Power User access. A Private is only visible by the creator of the search. To make the search public select the option Public from the pull down menu as shown in Figure 2. To make a search private select your name in the same window.
Information

In this section of the window you define the name for your search and the scope of your search. The information section requires a **Name**, **Includes** and **Scope**.

**Name:** All Saved searches require a name. Look at existing saved searches for your case’s naming conventions.

**Includes** is a drop down menu of Related Options. Running a search with this option blank, returns documents containing search “hits” exclusively. Selecting a related option from the drop down menu will return both, documents that are related to search hit documents and the search hit documents. Related options will vary depending on your case but here is an explanation on some of the most basic options.

a. **Family**-Example: an Email that has a Word Document attachment. A PDF with one or more Excel spreadsheets embedded.

b. **Email Threads**-EQUIVO

c. **Near Duplicates**-EQUIVO

d. **Unique Thread Family**-EQUIVO

**Scope** defines the set of documents that should be searched. Your search can be the entire corpus or documents found in just a few folders. **Entire Case** selects all case documents while clicking, the radio button, **Selected Folders** then clicking the link **Select Folders** allows you to pick which folders to include in your search as shown in Figure 4.
Search Conditions:
This section defines how you will search the content of your documents. This also depends on what indexing options you have selected during your case setup.

**Search With: Keyword Search** is a basic SQL search allows you to find key words in document content. Simply enter your search criteria into the text box provided. Valid operators are AND, OR, NOT. Terms within quotes become a phrase or literal search. The wildcard operator is *.

**Optional Search indexes**
Relativity supports other search indexes. Indexes are basically a data structure that improves the speed and retrieval of data. Options like DTSearch and Relativity Analytics create their own indexes to optimize their search functionality. These indexes are maintained separately from your standard Keyword index provided by Relativity.

**DTSearch**, as shown in Figure 6, is an additional index which provides proximity searching as well as keyword searching.

**Relativity Analytics** is a conceptual searching tool. Conceptual searching works with concepts contained in unstructured text. Unlike traditional search engines, its indexing is based on similar ideas and
concepts. The mathematically-based technology used in this type of searching is called Latent Semantic Indexing (LSI).

Figure 7

**Conditions**

The Conditions section of Relativity allows you to craft your search on the fields stored in your database.

Figure 8

The first box as shown in Figure 8 allows you to select single, double or triple parentheses. This allows complex levels of grouping between different criteria.

**Fields** is a drop down menu showing all of the fields you have access to in your database.

**Operator** is a drop down menu allowing you to select from an operator list for that field.

**Value** depends on the type of field and operator for that field. **Value** can be a text box where you type your search text or a menu button that when clicked displays a list of check box choices.

The fifth box allows you to close any parenthetical opened in the first box.

The sixth and final box allows you to connect your criteria using “AND” or “OR” operators.

**Fields (Required)**

**Fields** allows you to select the fields you want returned from your search. With this feature you can create reports from the information returned from your search. Using this feature wisely you can create a quick privileged log (see the [How to Create a Privileged Log](#) guide and video). To pick fields simply double click on the field you want to move, it will move from the available fields column on the left to the fields returned column on the right as shown in Figure 9.
Sort

The last section of the Search window allows you to define how you want your search results sorted. Select the fields you want to sort your documents by from the pull down menu and select if you want those fields sorted ascending or descending as shown in Figure 10.

Searching Beyond Document Content

What are fields?

Behind the scenes of Relativity is a powerful database structure giving the Relativity user the ability to search not only the text of a document but the fields stored in the database. There are basically three kinds of fields in a Relativity database: METADATA, PROCESSED and DOCUMENT fields.

METADATA is in short data about data. These fields represent information that is discovered during forensic collection. Some of these metadata fields are Date Sent, last Print, and many others. All of these fields are searchable through the Conditions section of your Advanced Search window.
**PROCESSED** fields are extrapolated during eDiscovery processing or information resulting from other third party processing i.e. Equivio processing. Some of these fields are Begnum AttachBeg Extracted Text, and many others.

**DOCUMENT** fields, on the other hand, keep track of the Review. These are the fields were your coding and comments are stored.

We hope this is information is helpful and if you need any other assistance please feel free to contact our support department at websupport@epiqsystems.com