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Advanced Search Quick Reference

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). This guide covers the three main search engines in Relativity - Keyword search, dtSearch and Lucence search - and outlines the basic workflows during the configuration process.

Note: This guide will NOT cover Analytics indexes, nor will it detail the operators acceptable for use in each of these search engines.

Search Engine	Keyword Search	dtSearch	Lucene Search **
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, users must first create a saved search. Search only on the Extracted Text field for optimal results. Next, use the saved search as the Searchable Set when creating a dtSearch index.	Lucene searches are optional. If used, ensure that Data Grid is enabled in the workspace (Workspace Details > Enable Data Grid: Yes).
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.	Any long text fields (on the document object) of your choice.
How is it used?	In the Documents tab: 1. Click Add Condition. 2. Click (Index Search). 3. Select Keyword Search from the drop-down. 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. 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.	In the Documents tab: 1. Click Add Condition. 2. Click (Index Search). 3. Select Lucene Search from the drop-down. 4. Enter Search Terms. 5. Click Apply. See the Searching Quick Reference for more details on available search operators.

*Except Data Grid-enabled long text fields

**Only available on Data-Grid-Enabled Workspaces

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	Lucene *
Engine	SQL	dtSearch	ElasticSearch
Noise words	Yes	Yes (customizable)	N/A
Search operators	Searching Quick Reference		
How to Index	Searching Quick Reference		
When adding data (Add new records)	Automatically updates	Incremental build	Automatically updates
When changing existing data (Overlay on existing records)	Automatically updates	Full build	Automatically updates
When removing data (Remove existing records)	Automatically updates	Full build	Automatically updates
Suggested fields to be indexed	Fixed length fields: Some long lext fields with small amounts of text (e.g. File Name) that are not indexed by dtSearch Index	Long text fields (e.g. Extracted Text, Email To, Email CC, etc.)	Long text fields (e.g. Extracted Text, Email To, Email CC, etc.)
Suggested indexes	N/A (all the fields flagged to be indexed are automatically grouped into an index)	• One for Extracted Text • One for Email To, Email CC, Email BCC	N/A (all the fields flagged to be indexed are automatically grouped into an index)
Searching on individual fields	Yes (select the individual field to search or filter on)	Yes (set up separate indexes that index Individual fields)	Yes (select individual field to search on)
Advantages	• Instantaneous Indexing • Ability to search on individual fields	• Ability to customize index • Ability to search on individual fields (involves separate index setup)	• Instantaneous Indexing • Ability to search on individual fields
Disadvantages	• Lacks specialized search capabilities • Inability to customize indexes	• Manual index maintenance	• Available only for long text fields • Inability to customize indexes (noise words, tokenizers) • Cannot filter on Data Grid-enabled fields • Cannot add Data Grid-enabled fields to a Layout

*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; best practice is to not run on large data sets	N/A

For example, Relativity users will 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%%"
Valet, Parking	%valet% OR %parking%	valet AND parking

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