

SEARCH GUIDE

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Searching in Insight

Searching in Insight is easy using the **Free-Form Search**, **Faceted Search** and **Tracked Search** modes. Searches are always up to date; when documents are loaded to your site, indexes are created based on document fields and content. Updates to documents are immediately available. Each searching mode provides allows you to:

- Save searches and access previously saved searches
- View your search history and re-run searches
- Limit your searches to a folder or multiple folders
- Access options to stem search words, match case and characters with accents, set the search language and select collections

Number of Records Found and Family Count

As searches are entered into the **Search** box, Insight dynamically provides the number of documents your search will return at **Found**. Click the **Information** (i) button to display the search query and family count.

Free-Form Search

The Insight **Search Assist** is available in each of the search modes. It is most often used in the **Free-Form Search** page to create searches of a single term, phrase or even multiple clauses. Click the **Search** button in the **Navigation** menu and then select **Free-Form Search**. Select the **Plus (+)** button to expand the **Search Assist** section.

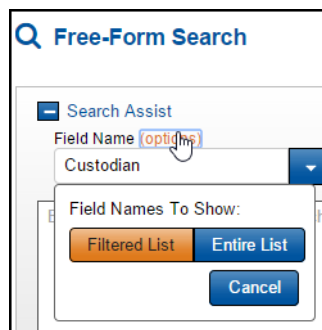
All searches in Insight are made up of this basic syntax:

Field Name—Operator—Value

Field Name

Use the **Field Name** menu to specify where in the documents you want to search (**Anytext**—all the fields and text of documents, **Begcontrol**, **DocDate**, etc.) You can type directly into the **Field**

Name box and select your field. You can also use list menus to find your field. Click the **options** link next to **Field Name** to select the list of fields you want to use. Under **Field Names To Show**, you can select either **Filtered List**, which is the list of database fields your administrator has set up specifically for your site and contains the fields most often searched, or **Entire List**. This is the full list of database fields. The option you select will be your default until you change it.



Select the field to search then at the **Field Name** menu.

Operators

We recommend using the Insight **Search Assist** to become familiar with Insight operators and Insight syntax. The selections available in the **Operator** menu depend upon the field you select in the **Field Name** menu.

Fields in the Insight database contain information stored as strings, integers or dates. String fields hold text, and examples include **Author**, **Recipient** and **Comment** fields. Integer fields contain numbers, such as **BatchNo**, or **NumAttachments**. Date fields contain date information. **DocDate**, **CreateDate** and **Emailsent** date fields are examples.

Basic Search Operators

Insight's basic search operators include:

- **Is (=)**

Used for an exact match. For example when searching for "pete" as the only value in the **Author** field, results will not include documents with "pet" stored in the **Author** field.

- **Is not (NOT)**

Used to exclude an exact match; the opposite of the **Is (=)** operator.

- **Contains (:)**

Used when other information can be stored in the field.

- **Does Not Contain (NOT)**

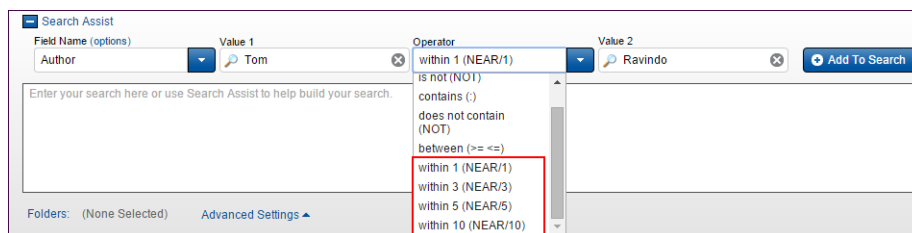
Used to find results that do not contain a specified value.

Other Operators

The operators **Between (>=<=)**, **Less Than (<)**, **Greater Than (>)**, **Less Than or Equal To (<=)** or **Greater Than or Equal To (>=)** are used when searching number and date fields. This search will find all records that have a document date before October 10, 2011:

Docdate < "2011-10-10"

Proximity searching is also available. Within the **Search Assist**, you will be able to select it at (**within/# (NEAR/#)**). When you select a near/# operator, the **Search Assist** will automatically give you two **Value** boxes to populate.



When typing directly into the **Search** box, use **NEAR/#** or **near/#** as the proximity operator. Do not mix case, such as **Near/#**.

Values

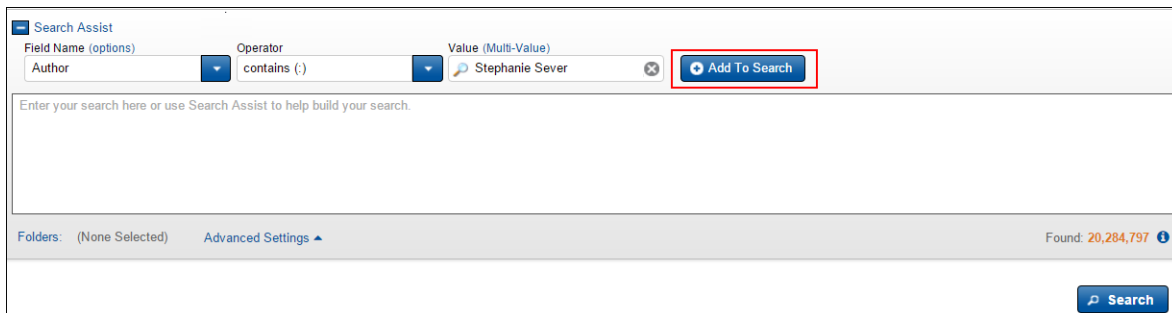
Values are the data contained in the fields, and these values are what you are searching. You may need to find numbers, dates, words or phrases. If the field you are searching has a **Facet** list

associated with it, you can start typing in the **Value** box, and the **Facet** list appears for auto fill. Find your value and click it to place it in the **Value** box. When you point to a value, it becomes highlighted. You can also press the TAB key on your keyboard to place it in the **Value** box.

Once you have added search values into the boxes using the **Search Assist** menus, you must click the **Add To Search** button in order for the search to appear in the **Search** box. If the **Search** box is empty when you execute your search, all the records in the database will be retrieved. Click the **Search** button or press your keyboard ENTER key to execute your search once it is added to the **Search** box.

Add to Search

Once you have added search values into the boxes using the **Search Assist** menus, you must click the **Add To Search** button to place the search in the **Search** box. If the **Search** box is empty when you execute your search, all the records in the database will be retrieved.



Click the **Search** button or press your keyboard ENTER key to execute your search.

You can also enter searches directly into the **Search** box. Type the search into the box, taking care to enter the search syntax correctly.

To enter an **Anytext** search directly into the **Search** box without using the **Search Assist** menus, simply type the word or phrase directly into the **Search** box without the **Anytext** field name or an operator:

AND/OR Connectors

Using AND and OR

Connectors are used to join multiple search clauses together. You can search for ANY of the clauses using the **OR** connector, or ALL of them with the **AND** connector. Using the same syntax: *field—operator—value*, put the connector between the clauses.

Finding either value:

author: smith OR author: jones

If all the values must be found, use the AND connector”

author: jones AND doctype: memo

Be sure to include the fields appropriately when you search with **AND** and **OR** connectors. This search is not looking in the **Author** field for bob or rob.

Author: "bob" or "rob"

The above search translates to *Author: "bob" OR Anytext: "rob"* rather than searching for either value in just the **Author** field. The below search is confined to the **Author** field.

Author: "bob" or Author: "rob"

You must use either **AND** (all uppercase) or **and** (all lowercase), but never use And or aNd. This is the same for the **OR** connector; use **OR** or **or**.

Mixing AND and OR Connectors

When constructing multi-clause queries using **AND** and **OR**, please note that **AND** has higher precedence; therefore, it is important to use parentheses to tell the search engine how to separate your search clauses. To run a search to return records that are PDFs and the **Author** field contains either joe or john, make sure you set off the OR terms parenthetically:

(Author:joe OR Author:john) AND Doctype:PDF

If you do not place parentheses correctly into the search, the search will be parsed like this:

Author:joe OR (Author:john AND Doctype:PDF)

This search returns documents with the **Author** field populated with joe or documents that are PDFs and john is in the **Author** field. This does not limit the search to just PDF documents.

BodyText and AnyText

When you are searching within the text of documents there are two fields to use.

- The **BodyText** field contains all of the text in a document. Because the documents are in XML, the text of the record appears below the fielded information.

To search for values in the text of a document, use the **Search Assist** to select **BodyText** in the **Field Name** menu, and then use the **Operator** menu to find and select the appropriate operator. Enter the search term into the **Value** box or use the **Multi-Value** link and use the **Lookup** tab to find your values, if appropriate. Facets are built upon the text of your records, so the **Lookup** tab will help you quickly find terms within the text of the documents for searching.

- **AnyText** searching will search all of the fields and the text of the document at one time. When building an **AnyText** search using the **Search Assist**, select **AnyText** in the **Field Name** menu, then your **Operator** and enter the **Value**. Then, click **Add to Search** to place your query into the **Search** box.

When you add the search to the **Search** box, the value is the only thing that appears in the box. You do not see **Anytext:** value. This is because values entered directly into the **Search** box are always **AnyText** searches. When you type any value directly into the **Search** box, it is automatically an **AnyText** search, which searches all of the fields and the text of the document at once. This is the most comprehensive search you can run in Insight.

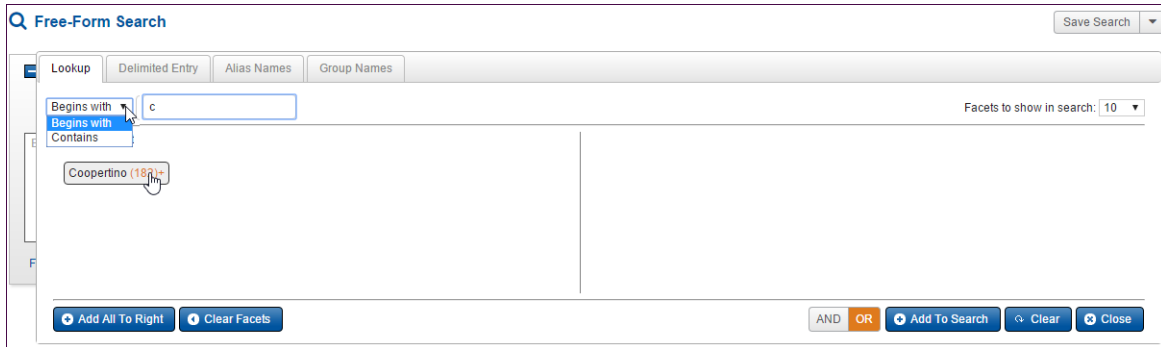
If you use the **Search Assist** to create your **BodyText** or **AnyText** query, remember to click **Add to Search** to put the search into the **Search** box and then click the **Search** button or press ENTER on your keyboard.

Multi-Value Options

When searching for a single value, you can quickly begin typing it into the **Value** box and expand the menu to select it. If you'd like to populate your search with more than one value, click the **Multi-Value** link located above the **Value** box. This is used to enter more than one discrete value at a time. If the field you are searching has a facet built on it, you can find the values associated with the field using the **Lookup** tab. You can also enter multiple values using **Delimited Entry** and populate the **Search** box with aliases or groups. Remember values are available in the **Lookup** tab if a facet is built upon your field, but you can use the **Delimited Entry**, **Alias Names** and **Group Names** tabs for any field.

Multi-Value—Lookup Tab

When searching for a single value, begin typing it into the **Value** box and expand the menu to select it. If you'd like to populate your search with more than one value, click the **Multi-Value** link located above the **Value** box. This is used to enter more than one discrete value at a time. If the field you are searching has a facet built on it, you can find the values associated with the field using the **Lookup** tab. When a field has a facet built upon it, the values that populate the field are available in the **Lookup** tab view. This allows you to see the values in your field, the number of documents which have the value in the field, and enables you to select more than one value to search. Find your value by entering some of the characters into the box. If you choose the **Begins** option, you will see the facets starting with the information you typed into the box. Selecting the **Contains** option searches for values that contain the characters somewhere in the value. To change the number of facets to display, select the number by expanding the **Facets** to show in search menu.



The number in parentheses next to each facet represents the number of documents with that value in the field. Click the **Plus sign (+)** button to move the value to the right frame. You can include more than one. Select either **OR** or **AND** at the bottom of the screen to place the connector between the values. This button is defaulted to **OR** and cannot be changed to **AND** if searching a single-value field. You can also click **Add to Right** or **Clear Facets** to take those actions from the left side of the screen. You can remove a value from your chosen list by pointing to it and then clicking the **Remove (X)** button. Select **Add to Search** to place the values in the **Search** box with the connectors. If the field you have chosen to search by in the **Field Name** menu does not have a facet built upon it, the **Lookup** text box will say: Selected field has no facets or lookups.

Multi-Value Options—Delimited Entry Tab

Click the **Delimited Entry** tab to enter search values separated by delimiters. Type your values into the box, and select the delimiter used to separate your value—**Comma**, **Semicolon** or **Hard Return**—using the appropriate button. You can also copy your values from text files, Excel spreadsheets and other software that allows copying.

1. Click **Add Entry to the Right**, and then select the **OR** or **AND** connector.
2. Click **Add To Search** to place the query in main **Search** box.

Multi-Value—Alias Names Tab

Click the **Alias Names** tab to search for different versions of a name or word. Aliases are set up by your site administrators, and they combine like values, enabling you to search for every

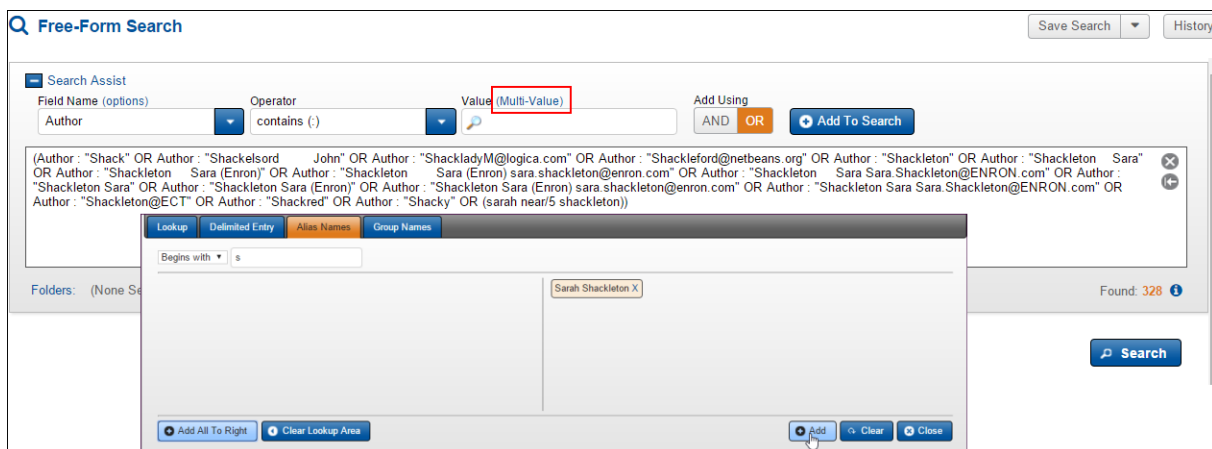
instance of a name or word or combination of words. Using this shortcut method saves time and is often more inclusive.

For example, if john doe were in the **Author** field as more than one value, such as “john doe”, “doe, John”, “John A. Doe”, “johndoe@company.com” and “JDoe@yahoo.com”, an alias can be created to populate all these values into your search query simply by selecting the John Doe alias.

To use an Alias for searching, click the **Multi-Value** link above the **Value** box. After clicking the **Alias Names** tab, select the name you want to search. If you don't see any Alias names, start typing in the value and select either the **Begins** option or the **Fuzzy** option. **Begins** will bring back the Alias names that begin with the value, and **Fuzzy** will bring back the values that exist anywhere in the Alias name. Click the **Plus sign (+)** to move the Alias to the right or click the **Add All to Right** button to move all Alias names to the right.

Then click **Add** to add the values to the **Search** box.

After you add the values to the **Search** box, they are separated into the individual search terms or clauses that make up the alias or aliases you selected. The **OR** connector is inserted between the values.

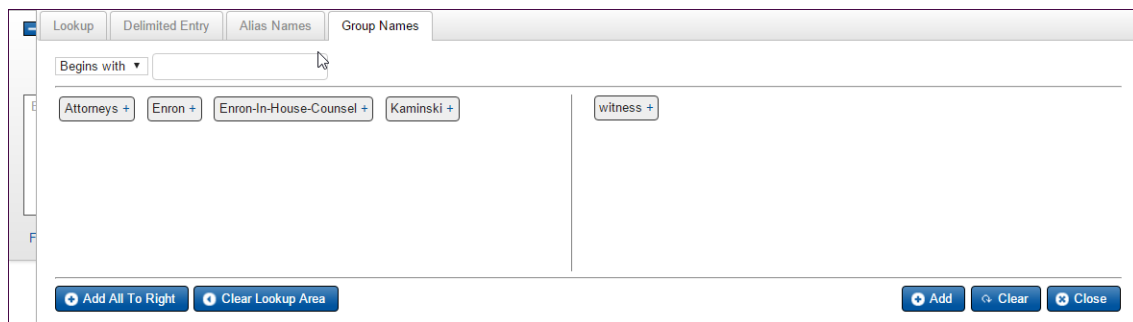


Multi-Value—Group Names Tab

If groups have been created on your site, you can use groups to search for combinations of values.

Groups are made up of aliases. Perhaps your administrator has created aliases for each attorney. The administrator could then combine the aliases into, for example, a Privilege Group. You could create a query using the Privilege Group, and all the names making up the group will then populate your search query.

To search by groups, after selecting the **Multi-Value** link, go to the **Group Names** tab, and select the groups by clicking the **Plus sign (+)** or **Add All to Right**.



As with searching aliases, the names will expand to show all the values separated by **OR** after you add them to the search.

Quotation Marks

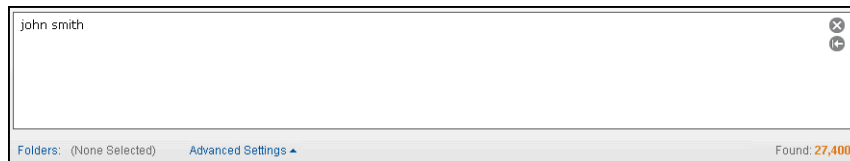
You may notice that when you use the **Search Assist**, your search value is contained in quotation marks after you add it to the **Search** box. Phrases should always be in quotes. You can also type your search terms directly into the box.

Insight's search engine automatically interprets Smart (curly or typesetter) Quotes as straight quotes, so you can copy terms from Word, Outlook and other programs that have Smart Quotes into the **Search** box without any editing.

When you enter your search with quotes, the value will be looked for in its entirety. The search *"john smith"* will look for that value as a phrase.



If however, you were to enter the search without quotes, *john smith*, the search will actually translate to *john AND smith*, looking for the word *john* and the word *smith* both in the document, but not necessarily together. Notice how the counts change without the quotes.



But the search *john smith* and the search *john AND smith* return the same results, since the AND is implied, and the query is translated to *john AND smith* when the quotes are not used.

Parentheses

Many searches require the use of multiple words with **AND** and **OR** connectors. Parentheses should be used to differentiate the portions of the search you want to separate out into clauses. When using both **AND** and **OR** in a search query, it is important to use parentheses correctly, because they tell the search engine to group your criteria into the logical sets you need.

(recipient: "joe.smith@xyz.com" OR recipient: "jane.doe@abc.com") AND docdate < "2001-10-03"

In the above search, the use of parentheses translates the search to request that either recipient should be in the record, but they must all be before 10/3/2001. If the search had no parentheses, the search would translate into this syntax:

recipient: "joe.smith@xyz.com" OR (recipient: "jane.doe@abc.com" AND docdate < "2001-10-03")

This brings back documents where either Joe Smith or Jane Doe was the recipient, but the Jane Doe documents will be limited to dates prior to 10/3/2001.

AND has higher precedence than the OR, and because there are no parentheses to group the clauses, the search engine will translate the query by grouping the values separated by AND first.

It is best practice to always use parentheses in searches contain both **AND** and **OR**. Do not use parentheses in place of quotation marks. This search (*john smith*) translates to *john and smith* not the phrase "*john smith*".

Punctuation

Most punctuation is treated as a blank space in date and string fields.

Brackets

Brackets are used to create shortcuts for your searching by replacing the connector. This search:

Author: [Joe John Mike]

is a shortcut for the search:

Author: "Joe" or Author: "John" or Author: "Mike"

If using brackets when entering search values into the **Search** box, it is best practice to limit the use of shortcuts to field or Bodytext searching. Putting values into brackets for field searching, creates an OR search as above. Anytext searching does not work the same way. Shortcuts for Anytext searching creates an AND search.

Please refer to [Special Search Considerations](#) for more details on using shortcuts in your search queries.

Proximity Searching (Near Searching)

You can construct proximity searches, also known as near searches. When typing directly into the **Search** box, you are conducting an **AnyText** proximity search: the values are searched against all public fields and the document text. Insight uses the *near/#* terminology. The number # you use includes the end number. "john" near/1 "smith" would find john smith.

To search for two terms near to one another, insert the number of words you desire between your terms with near/:

Value1 near/# Value2

You can also search phrases in proximity of one another but you **MUST** enclose the phrases in quotes:

"Phrase Value 1" near/# "Phrase Value 2"

You can combine proximity statements into one phrase. If the proximity requirement is the same number, construct it this way:

(ValueA near/3 ValueB near/3 ValueC near/3 ValueD)

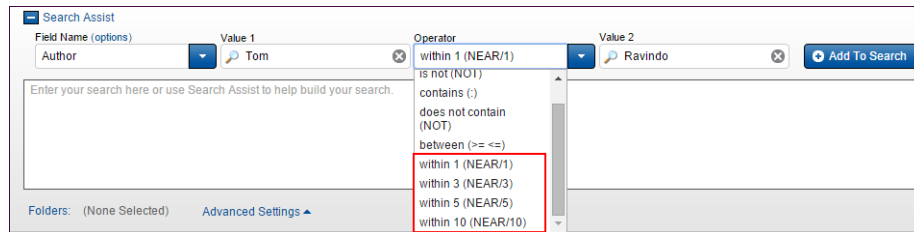
You can change proximity ranges, but you must use parentheses to group the statements:

(jim or paul or mike near/5 lisa or teresa or michelle) near/8 (finance or account or loan)

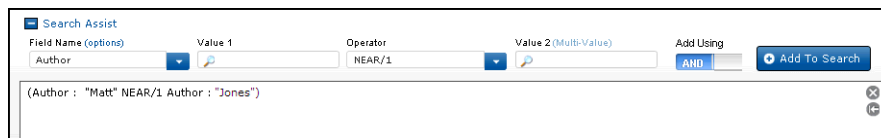
You can also use the **Search Assist** to construct your proximity searches.

Expand the **Field Name** menu and select the field you want to search. In the **Operator** menu, you'll see the default proximity ranges along with the word **within**, for example, **near/1**, **near/3**, and **near/5** (remember that you are not limited to these ranges when you type directly into the **Search** box). When you select a **near/#** operator, the **Search Assist** will automatically give you two **Value** boxes to populate.

Add the search to the **Search** box, and then click **Search** or press the ENTER key on your keyboard to run your proximity search.



When you create proximity searches using fields, you must include the field and the contains operator for each value. The **Search Assist** does this for you. If you are typing your search directly into the **Search** box, follow the same query structure:



Wildcards

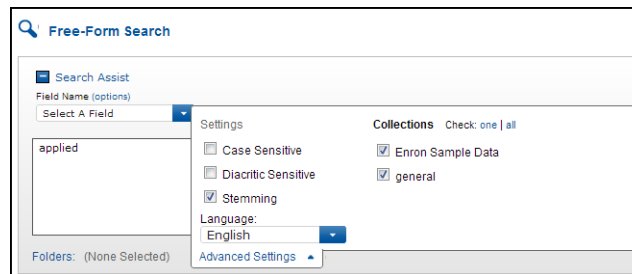
When entering a search term, you may need to search for expansions of the term. Insight offers wildcard searching with the asterisk (*). For example, searching *Bodytext: "program"* will find all instances of program and any words that start with program in the text of documents.

There can be more than one wildcard in a single search term or phrase, and the two wildcard characters can be used in combination. For example, *man* will match words

starting with m with three or more characters. When searching phrases with punctuation and the wildcard (*), your results may not be what you expect. For example, this search *"*law.com"* will return false positives. Using near/1 in place of the punctuation is a good workaround. Instead of searching *"*law.com"*, search *"*law" near/1 "com"*. Please refer to Special Search Considerations for more examples.

Advanced Settings

The options at **Advanced Settings** allow you to customize your search query. For example, you may want to run a case sensitive search or a search that is limited by accents. You may want the search engine to stem your words. You can also select the language and the collection(s) for the search at **Advanced Settings**, which is available in all the **Search** modes. Expand **Advanced Settings** to see the options. If you select to use any of the **Advanced Settings**, you will see the selections in orange text beneath the **Search** box.



When a search is limited to specific folders or collections/matters or using other **Advanced Settings**, the selections can be cleared by selecting **Clear (X)**. Clearing the selections at **Folders** and **Advanced Settings** removes these restrictions from the search. Clearing at **Matters/Collections** selects all available **Matters** or **Collections** to you rather than limiting your search to only the selected checkboxes.

Case Sensitivity

Select the **Case Sensitive** checkbox at **Advanced Settings** if you want to limit a search by case sensitivity. For example, if searching for the name *White*, selecting the **Case Sensitive** checkbox will tell the search engine to find documents with the word/name *White* and to exclude documents containing the word *white*.

Searches containing range operators (>, <, >=, <=) used with string fields will always be case sensitive, even if the **Case Sensitive** checkbox is not selected at **Advanced Settings**. For example, assume that the lowest BegControl number available is “ABC000001”. A search for

BegControl >= “ABC0000001” would return all records. A search for BegControl >= “abc0000001”, however, will return 0 results.

Diacritics (Accents)

Accents, umlauts, tildes and other marks used in several European languages are called diacritics. The search engine will ignore diacritics by default. Searching for the word *unité* would return documents containing the word *unite* or *unité* unless you select the **Diacritics Sensitive** checkbox to limit the search to only the word *unité*.

Stemming

The search engine will not stem words unless you select the **Stemming** checkbox at **Advanced Settings**. Stemming is a process of language normalization. The variant forms of a word are reduced to a common stem. The search engine then extends the search to return documents that contain grammatical variations of the stem. Typically stemming enlarges your results as documents containing any variant are returned. Perhaps the key term you are searching is *applied*. Selecting the **Stemming** checkbox returns documents containing *applied* and documents containing *apply* and *applies*.

Turning on stemming is not recommended for CJK languages.

Collections

At **Collections**, select the checkboxes to tell Insight which sets of documents you want to search. Remember that you may not see all collections within the site. Your administrator will assign you to only the documents you should see.

Select these document sets individually using the checkboxes, or click **all** at **Check all | none** to search all the collections within your rights. If you clear checkboxes, remember the system will force one to remain selected. You cannot clear every collection.

Language

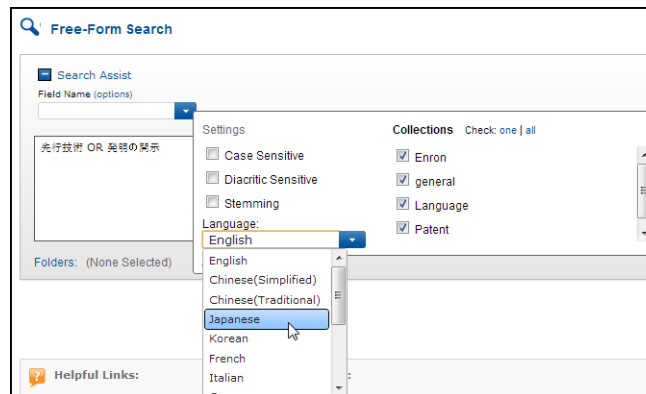
If you are constructing searches using non-English words or phrases in the search query, you can expand the **Language** menu at **Advanced Settings** and select the language used. Insight performs language recognition, but setting the specific language optimizes the search engine.

This is especially helpful for tokenization purposes when searching the CJK languages.

Language options are:

- Chinese Simplified
- Chinese Traditional
- Japanese
- Korean
- French
- Italian
- German
- Spanish
- Arabic
- Russian
- Dutch
- Persian
- Portuguese

English is the default setting, but when you change to a different language, that language will remain selected until you change it.



Empty and Not Empty Fields

It is often useful to find fields that are empty, meaning they have no value in them, or fields that are not empty, those that contain values. To find fields with empty values, use the **Equals (=)** operator and use quotation marks as the value.

Comments=""

Conversely, use **NOT** to find those that are not empty.

NOT(Comments="")

Searching Redactions

To search for documents with redactions, use the **Redactiontext** field. This field holds all the values associated with the redaction, such as the redaction set the document was saved to, the name of the user who redacted the document, etc. Search the field with the syntax

redactiontext:jsmith and redactiontext:redacted

This search will bring back all documents that were redacted by *jsmith* and contain the word *redacted* in the redaction box.

If you want to find all documents that have redactions, use the field **Hasredactions**. This field contains true or false values. The syntax to use is:

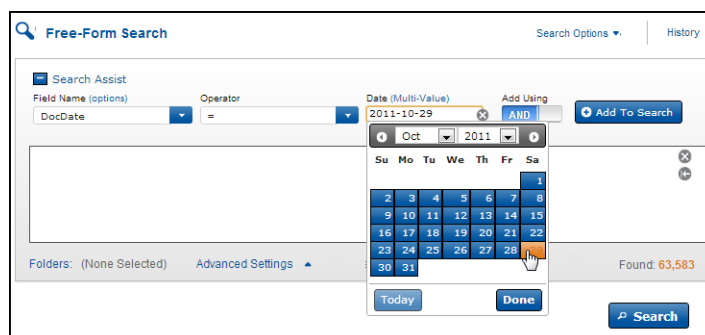
hasredactions:"true"

To find all documents without redactions, just place a **NOT** in front of the search.

NOT(hasredactions:"true")

Dates

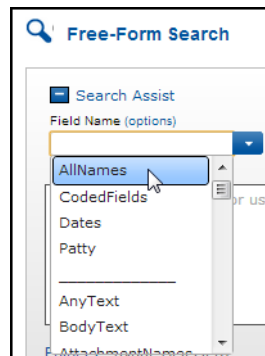
Dates are searched in the Year-Month-Day (YYYY-MM-DD) format. You can enter the date by using the calendar or you can type the date into the **Date** box using the four-character year, two-character month and two-character day (YYYY-MM-DD) date.



if you enter the date value in the wrong format, you will receive a syntax error:

Field Alias

Field Aliases may be available on your site when multiple fields need to be searched at one time. A good example of this may be a search all of the major fields that contain names (e.g. author, recipient, cc, bcc, custodian). If a Field Alias exists, you will see it at the top of the **Field Name** drop-down list.



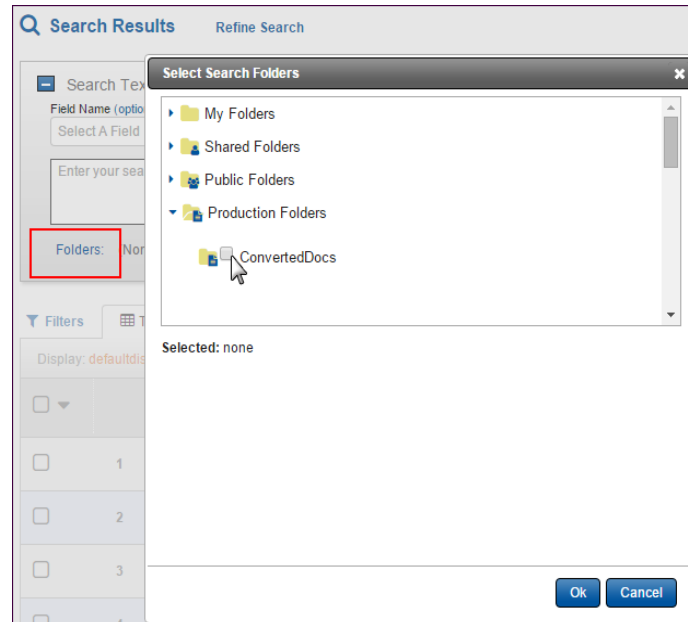
Select it, and then select the **Operator** and **Value**. As always when using the **Search Assist**, remember to click **Add to Search**. The search will expand to contain all of the fields associated with the **Field Alias**, and the **OR** connector is put between each phrase.

Folder Search

It is often useful to search the contents of a folder or folders. The syntax for searching does not change, but you can limit your search to the folder or folders by clicking the **Folders** link under the **Search** box.

The **Folders** dialog box displays the different folder types. Expand the type or types of folders you want to see and then select the folders that you want to search. You can select different types of folders to search at one time. In this example, both **Public Folders** and **Dynamic Folders** are selected.

Once selected, you will see the number of folders represented next to the link under the **Search** box. To no longer limit your search to the selected folders, click the **Clear (X)** button beside the folder number.





Clear and Expand or Contract Search

The two buttons in the right of the **Search** box are **Clear** to delete your search and **Expand/Contract** to lengthen or minimize your search.

Clicking the **Clear** (X) button will remove your search. Clicking the **Arrow** button will expand or contract the search. Sometimes it is easier to view a search in its expanded form. This is an example of an expanded search:



This is the same search compacted:

Author : "smith" OR Bcc : "smith" OR Cc : "smith" OR Custodian : "smith" OR Recipient : "smith"  

Special Search Considerations

All search engines have some special considerations. Here are a few things to take into account when you are constructing search queries in Insight. Understanding these special considerations will help you create the most meaningful and effective searches. And please remember that many queries that would be considered a syntax error in other search engines may not be errors in Insight but also may not return your expected results.

Entering queries directly into the Search box

It is important to know Insight's syntax when entering searches directly rather than using the **Search Assist**. For example, perhaps you want to run a search confined to the **Author** field for the values "joe" or "john." This would be the correct search:

Author: "joe" or Author: "john"

You could also use the shortcut:

Author: ["joe" "john"]

You would not want to enter the search in this way:

Author: "joe" or "john"

The above search translates to Author: "joe" OR Anytext: "john" rather searching for either value in just the **Author** field. Here is another example:

bodytext: "subsidiary" or "affiliate" = 60,873

This may appear to be searching the Bodytext for "subsidiary" or the Bodytext for "affiliate". But, this is not appropriately limited to just the Bodytext and is searching the Bodytext for "subsidiary" or Anytext for "affiliate".

These two searches are correctly searching only the Bodytext.

bodytext: ["subsidiary" "affiliate"] = 60,826

(bodytext: "subsidiary" or bodytext: "affiliate") = 60,826

Brackets are used to create shortcuts for your searching. This search: Author: [Joe John Mike] is a shortcut for the search:

Author: "Joe" or Author: "John" or Author: "Mike"

No brackets (shortcuts) with Anytext searching. The below search is not incorrect syntax, but it works differently from using shortcuts with fields and operators.

["program" "code"]

As you know, you cannot type Anytext and an operator into the **Search** box to run an **Anytext** search. As best practice, we also recommend you avoid using shortcuts, as above, in **Anytext** searching because the space between the terms becomes an AND not an OR, which happens in all fielded shortcut searches. Instead place the AND or OR in the query appropriately.

"program" OR "code"

"program" AND "code"

No spaces before brackets

In the below query, the system sees the space and is searching for the word "ALL" in the Bodytext. It is then converting the shortcut of ["peter" "sarah"] to an Anytext shortcut of peter AND sarah. So the search query is looking for documents where ALL is in the Bodytext AND peter AND sarah are in Anytext.

Bodytext : ALL ["peter" "sarah"]

The correct search does not have a space between ALL and the opening bracket [. This search is returning documents in which peter AND sarah appear in the Bodytext.

Bodytext : ALL["peter" "sarah"]

Using wildcards

For unknown characters, Insight uses the asterisk (*) for wildcard searching. The asterisk signals the search engine to look for zero or more characters in place of the *. You can use the wildcard when searching Anytext and fielded data. It is important to use as much of the root word/term as possible. Using a single letter with the wildcard is typically not helpful.

This Anytext search will return documents containing tech, technology, technical, and any other word beginning with tech in the fields or the text.

"tech"*

This Bodytext search will return documents containing Guire, guire, Maguire, Macguire, MacGuire, mcguire, McGuire in the text.

*Bodytext: "*guire"*

Constructing queries using ORs and ANDs

Understand your goal when constructing queries that contain both OR and AND. Compare the following:

"gas" OR "electric" AND "car" = 389,662 hits

The AND has higher precedence than the OR, and because there are no parentheses to group the clauses, the search engine will translate the query this way:

"gas" OR ("electric" AND "car") = 389,662 hits

But, if you leave out the AND, the search engine will translate this to an implied AND. Now, the OR takes precedence over an implied AND:

"gas" OR "electric" "car" = 11,569 hits

Which means the search is doing this:

("gas" OR "electric") AND "car" = 11,569 hits

Finally, your goal may be to search for the term "gas" or the phrase "electric car":

"gas" OR "electric car" = 384,823 hits

Therefore, you should always explicitly declare ANDs (never rely upon spaces), and you should always use parentheses to ensure you are returning the results you need. Remember also that forgetting to declare your connectors or not using quotation marks and parentheses to develop your query may even cause you to search **AnyText** when you do not intend to. This query:

PatentIssues: prior art or claims

Is translating to:

PatentIssues: prior AND Anytext: (art or claims)

Understanding Not Contains and Not Equals

Not contains is not searching for an exact match. In other words, if you are looking for a partial term, you would use the Not Contains syntax. Perhaps the **Issues** field has the values call and call center as options. Using this search, you will find all the documents that do not contain call, whether the value "call" or the value "call center" is chosen.

not(issues : "call")

When you need the value to match your search exactly, use the Is Not (not equals) syntax:

not(issues = "call")

Near (Proximity) searching

When constructing proximity queries, you will define the proximity by inserting a number after the near/. This number establishes the number of words that separates your terms and it includes the end term: searching "patent" near/1 "guarantee" returns documents containing "patent guarantee" in any fields or the text. When you use the Search Assist, you will see the within word used to denote our near searching. If you type directly into the Search box, remember that within is not used as syntax.

In this search, "guarantee" is counted as the 1 term between the two terms; searching "patent" near/2 "extension" returns "patent term extension" or "patent resolution extension". With

proximity searching, use the field names with the colon (:) before the terms except when searching Anytext.

author: "joe" near/3 author: "baker"

Bodytext: "joe" near/10 Bodytext: "baker"

subject:"water" near/3 subject:"contamination" near/6 subject:"toxin"

For an Anytext near search, enter the terms and the near conditions:

"water" near/3 "contamination" near/6 "toxin"

If you use multiple proximity statements in your query, the system will put parentheses in automatically if you do not. This search:

"water" near/3 "contamination" near/6 "toxin"

Will translate to:

("water" near/3 "contamination") near/6 "toxin"

The above query finds records that have water and contamination with no more than two words between them, and toxin will be no more than five words away from either water or contamination. Remember to use parentheses appropriately when constructing your near searches.

Understanding highlighting

Highlighting is separate and distinct from searching. All terms within your search query will highlight in a document, even if the discrete term is not part of the reason the document was brought back in the search. If you run the query ("water" near/3 "toxin") you may discover that "water" is only within three words of "toxin" in one location, but each instance of "water" and each instance of "toxin" will be highlighted throughout the document.

As you know, most punctuation is interpreted as a blank space when searching date and string fields. The search: Recipient: "juser@denlaw.com" will find documents where the Recipient field

contains "juser denlaw com" or "juser.denlaw@com", or, of course, "juser@denlaw.com". But, highlighting is only applied to the exact match:

"juser@denlaw.com".

Running a **Power Search** group may return no documents for a specific search query within the group, but the terms from all queries will be highlighted within the documents. For example, a report may produce 20 documents or hits with a breakdown such as this:

Search 1 – recipient: "joe" – hitcount 5

Search 2 – author: "smith" – hitcount 15

Search 3 – bodytext: "bill*" near/5 bodytext: "jones" – hitcount 0

If "bill" or "jones" appears within any of the 20 documents returned for this group, those words will be highlighted even though the query containing these terms resulted in no documents.

Faceted Search

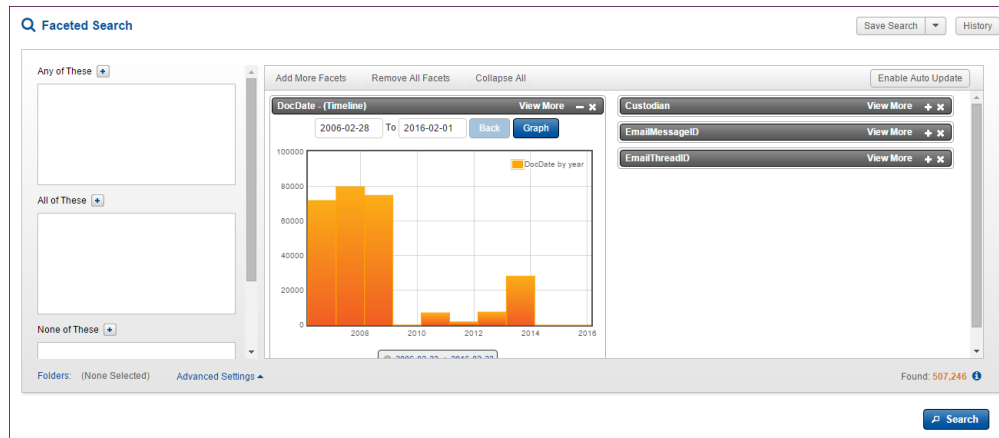
When you begin searching in Insight, using **Faceted Search** is a good place to start. You can create and customize fielded searches without being familiar with Insight's syntax or about the fielded information of your document population. You've probably run faceted searches many times in other Web sites. For example, perhaps you want to order new athletic shoes from a particular commercial Web site. You may want to search by size and activity type and arch type, color, etc. As you narrow in on the available selections, you are running a faceted search. In Insight, you can quickly drill into your document set in the same way, by seeing your options and making selections in the user-friendly **Faceted Search** interface.

Not all fields in Insight have facets built on them. Facets are built on the fields that indexes can provide the most benefits.

Using the Faceted Search Interface

The **Faceted Search** mode is a good place to see the values in the fields of your documents and construct search queries using fields that have facets built on them. This is similar to, for example, a commercial website. Fields, such as shoe size, are indexed, so the purchaser can quickly see their options. Insight's **Faceted Search** does this for the fields associated with documents in your site. Access the **Faceted Search** mode, and then click the **Search** (**magnifying glass**) button in the navigation bar. Then, under **Modes**, select **Faceted Search**. If you've never used **Faceted Search**, the interface will be empty.

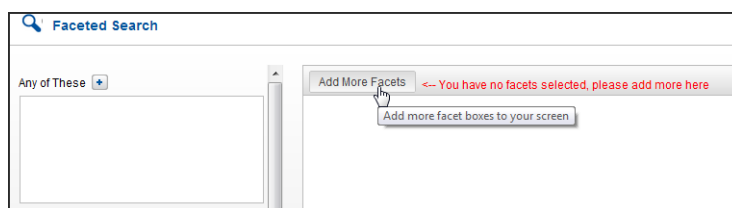
Available fields which have facets are displayed in the right frame. Your **Search Connector** boxes are in the left frame. Here is a look at a populated **Faceted Search** page:



Add Facets

You need to add the faceted fields to the interface in order to choose the appropriate values that will make up your search. You can also remove and reorder them in the interface, making it easier to find your values in the right pane. Faceted fields already chosen will remain in the screen and in the order you've determined until you remove them or reorder them.

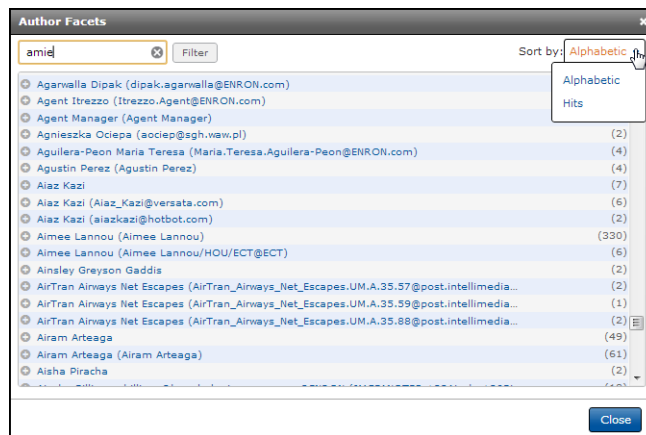
Click the **Add More Facets** button:



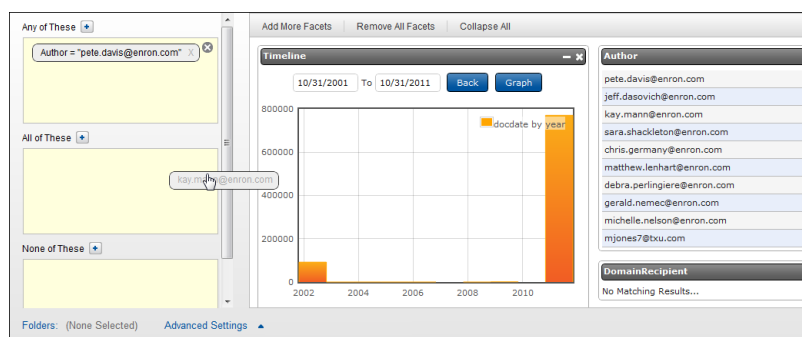
In the list, click a field to add it to the page. Continue to select any fields you may want to search. This simply makes the fields available to use in your searches. Choosing to display them in the interface does not obligate you to use them in your search or searches. Any fields in the list that are dimmed are already displayed in the page.

Once you have chosen your fields, you can begin constructing your searches.

The **Faceted Search** page is flexible and interactive. If you don't see your value in the **Facet** field list, click **View More**. This opens a new dialog box. Use the scroll bar or enter some of the characters of your value and click **Filter**. You can look at your list in alphabetical order or in hits (number of occurrences) order.



Once you find your value, click it to add it to **Any of These** or drag it to any of the **Search Connector** boxes in the left frame.

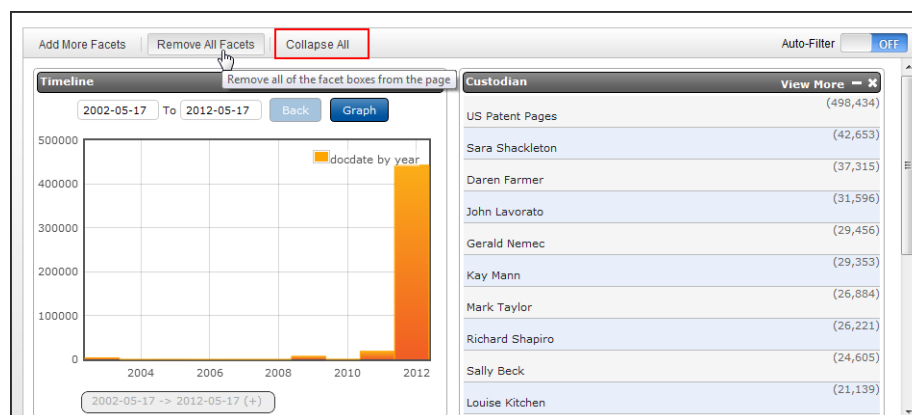


Rearrange the Facet Screen

You are using the **Faceted Search** mode to visually analyze the values in fields and construct meaningful searches. You can rearrange the interface for ease of use. Click in the title bar of a **Facet** field and drag the field to a different area.

You can also minimize a specific field or remove it from the screen.

You can minimize all the fields by clicking **Collapse All** or remove all of them at once:



Faceted Search Connectors

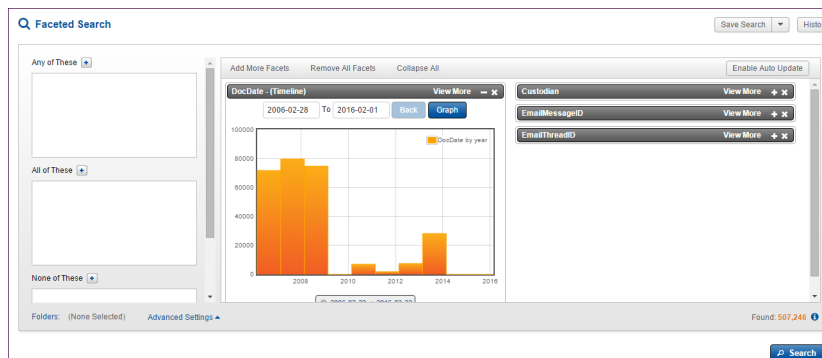
The **Search Connector** boxes in the **Faceted Search** mode work as specific connectors for the values in the search query.

Any of These: This is the default **Search Connector** box. If you click a value, it will go into the **Any of These** box. **Any of These** creates an **OR** search among each of the values placed in this box.

All of These: Place values in this box when you want to run an **AND** search. In other words, all values placed in this box must be met to return a document.

None of These: To rule out values, place them in this box.

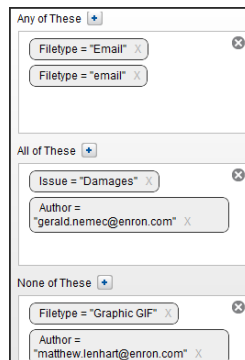
Each time you add a value to one of the **Search Connector** boxes, the number of documents found refreshes based on your entries, so you always have an idea of the counts before you even run the search.



When you are ready to execute your search to access the documents, click the **Search** button in the bottom right of your page.

It is important to remember that you are developing searches based upon your selected fields and values and the **Search Connector** boxes you are using. Additionally, if you populate more than one type of box, you are also placing an **AND** connector between each **Search Connector** box.

In other words, if you have populated the **Faceted Search** in this way:



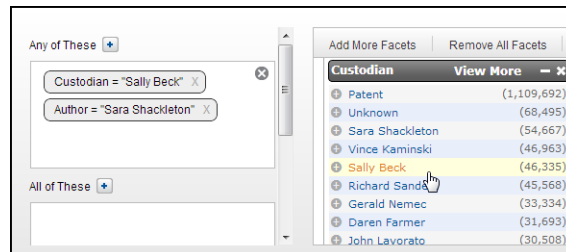
You are running this search:

(Filetype = "Email" OR Filetype = "email") AND (Issue = "Damages" AND Author = "gerald.nemec@enron.com") AND (NOT Filetype = "Graphic GIF" AND NOT Author = "matthew.lenhart@enron.com")

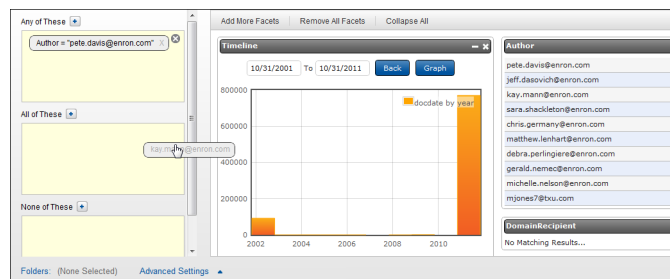
You can see the search query as interpreted by the parser by clicking **Search Options** in the top right of the page and then **Preview Search Data**. In the **Results** page after you've run your search, you can also view the query at the top of the page at **Search Text**.

Select Facet Values

To select facet values from the appropriate fields in the right screen, click a value, and this moves it to the **Any of These** box by default. In addition to the value you selected the field name that contained the value and the **Equals** operator are displayed. The below image shows a search for *Author = "Sara Shackleton."* By clicking the value Sally Beck at Custodian, the search would become *Author = "Sara Shackleton" or Custodian = "Sally Beck."* because clicking that value will place it into the **Any of These** box with the existing selection and an OR connector.



You can also drag any value from a displayed field to a **Search Connector** box. Use this method when you want to place values in the **All of These** and **None of These** boxes.

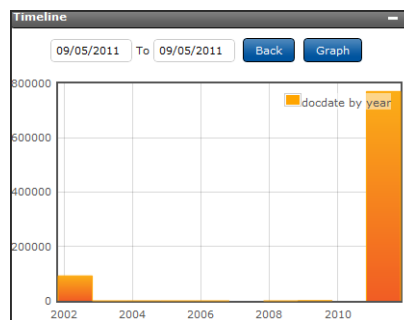


Timeline Facet

A **Docdate** (timeline) facet may be built for your site. If your site has a **Docdate** facet and you add it to your screen, not only will you be able to search documents by a range of date values, but you'll also be able to graph the document counts based upon your dates. You can limit or expand your date range using the graph.

Click **Add More Facets**, and select **Docdate—(Timeline)** to make the timeline values available for searching.

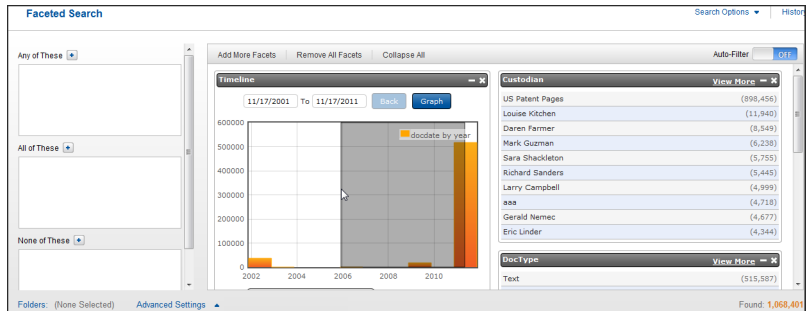
Today's date will automatically populate the **Date** fields, and a graph appears showing the document counts.



You can click in the **Date** fields to type in new dates or use the calendar to populate the beginning and ending **Date** fields.

Click **Graph** to see the document counts for the dates you input.

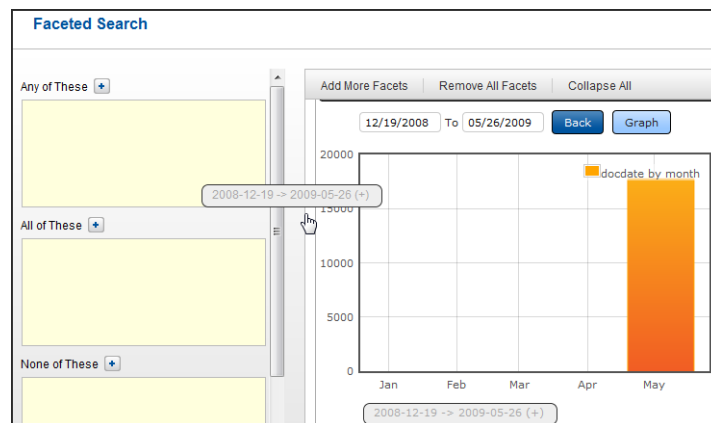
You can also populate the **Date** fields using the graph. Click in the graph and drag an area to change your date range. For example, you may see a date or date range that shows several documents and you'd like to search by this.



Ranges can be limited by day, month or year but cannot be less than one day:

View previous timeline graphs by clicking the **Back** button.

Whether you've entered dates into the **Date** fields or used the graph to populate them, remember to add the values to the appropriate **Search Connector** box in order to use the dates in your search:



Add to Faceted Search Using Search Assist

You can also add values to the **Faceted Search** page **Search Connector** boxes using the **Search Assist**. Click the **Plus sign (+)** button associated with the **Search Connector** box you'd like to use. In this example, the new query will be added to **Any of These**.

Use the **Search Assist** menus to build your search or type your query directly into the **Search** box. (Please see the [Search Assist section](#) for more information.)

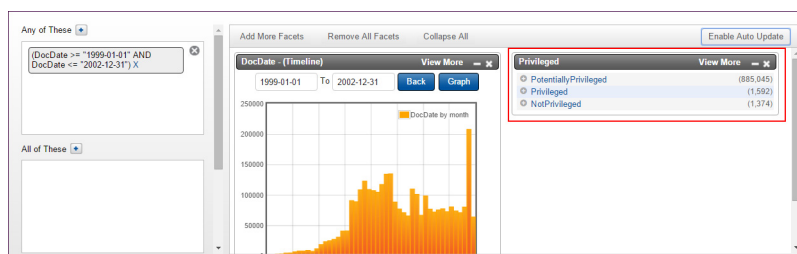
Then, click **Add**. This places your query into the appropriate **Search Connector** box.

Auto-Filter

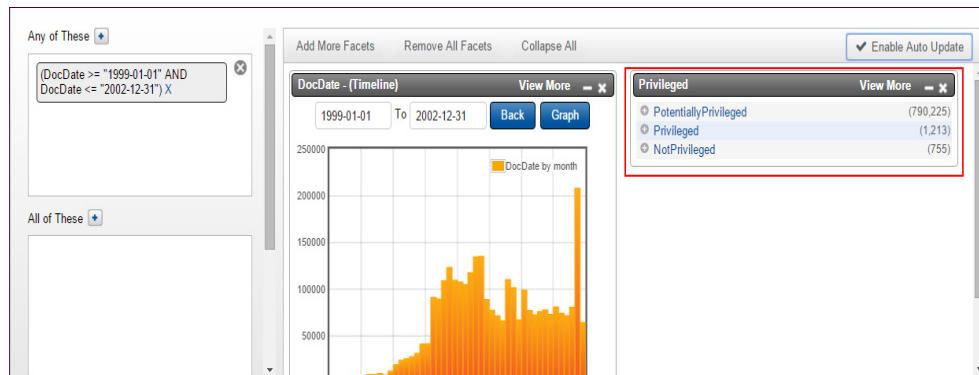
You can dynamically filter your search selections in the **Faceted Search** mode by enabling auto filtering, which limits your available values based on the choices you make. It is a good way to drill into the documents in your database and to visually understand your document set. You can turn auto filtering on or off using the **Auto-Filter** button located at the top right of the **Faceted Search** screen.

With auto filtering, when you place a value in one of the **Search Connector** boxes, you will notice that the other facet lists you've made available dynamically refresh, and only values associated with the value you've chosen display in the fields.

With auto filtering turned off, and the author *pete.davis@enron.com* selected, all document types available in the database are listed in the **DocType** list and all authors, including *pete.davis@enron.com*, are listed:



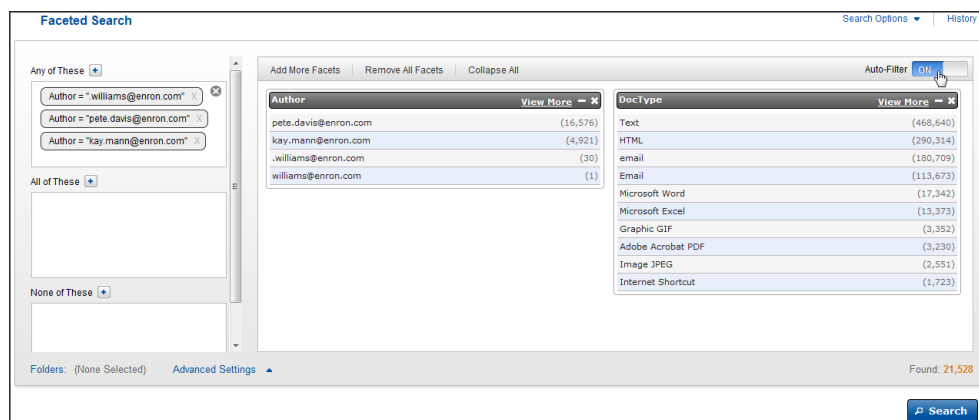
With auto filtering turned on, only the document types associated with this author are available, and the **Author** list is now limited to just the *pete.davis@enron.com* value:



Therefore, auto filtering removes all other non-associated values based upon the values you select.

If, using the example above, you wanted to add more authors, you'd need to turn off auto filtering, so that the other **Author** values become available, but you can apply auto filtering at any point in your use of **Faceted Search**.

In the below example, three authors were chosen with auto filtering off. Then, auto filtering was turned on, and the system refreshed to display the appropriate values in the **Author** field and the **DocType** facet values associated with these three authors:



Tracked Search

Use **Tracked Search** to sample, test and refine your searches of the text of documents. The **Tracked Search** mode allows you to find documents and build reports about your results and decisions.

You can see variations on your keywords that would return in your search results before you actually run your search. Quickly eliminate terms that are not relevant and retrieve relevant documents. **Tracked Search** supports Boolean searches, and you can run multi-clause searches using six specific search features simultaneously (Any, All, None, Custodians, Dates, and Other Criteria). Case sensitivity is tracked as well.

Using the Tracked Search mode, you can construct OR queries using **Any of These** and AND queries using **All of These**. You can rule out key terms and phrases using **None of These** and include custodian and date searching, as well as Free Form queries using the **With These Criteria** field. See the appropriate section for Information on populating these fields.

Any, All or None of These

The **Any of These**, **All of These**, and **None of These** sections of **Tracked Search** are built around text and phrases within documents, specifically the body text of a document.

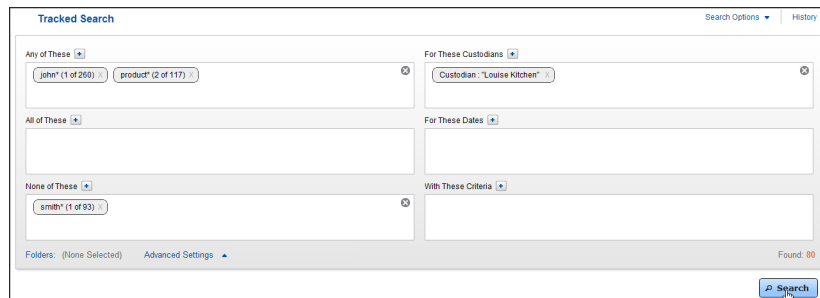
Use the appropriate boxes to construct your queries:

- **Any of These** will put the **OR** connector between the values. Use **Any of These** to search for multiple values in the document text at once. This option is the same as using a search **OR** connector for the values you select. The values will be searched in the body text of the documents.
- **All of These** will put the **AND** connector between the values.
- **None of These** will put the **NOT** connector in front of each value and the **AND NOT** connector between the values.

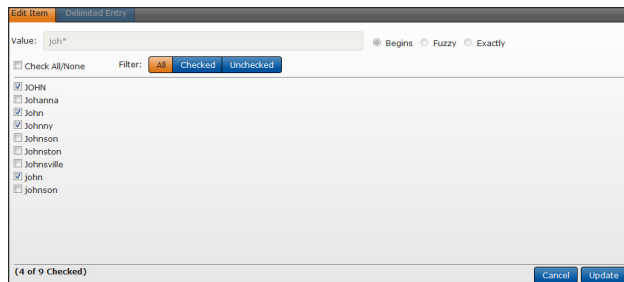
These different sections of **Tracked Search** are called the **Connector** boxes. If you place values in more than one **Connector** box, an **AND** will be placed between the boxes in the search query.

Lookup Entry

In the Tracked Search screen, use the **Plus sign (+)** beside the **Connector** box (**Any of These**, **All of These** or **None of These**) you want to use to build your search.



Click the **Plus sign (+)** button to bring up the search window. Under the **Lookup Entry** tab, you can enter the **Value**. Depending on the option button you select (**Begins**, **Fuzzy**, or **Exactly**) the values that are found, will appear in the screen.



The value in parentheses represents the number of values you selected in the list.

Using Begins, Fuzzy, Exactly

Select **Begins** in order to find all words that begin with the value you type into the **Value** box. It is equivalent to entering the word into [Free-Form Search](#) followed by a wildcard.

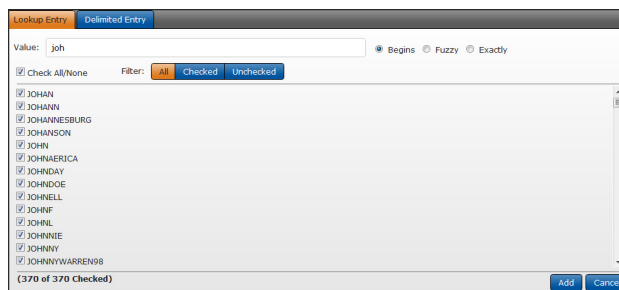
Select **Fuzzy** to find words that contain the value and this will broaden your search. This is equivalent to looking for the value with wildcards on both ends in Free-Form Search.

The **Exactly** option will search for the exact value that you enter into the **Value** box.

Selecting Values

The values found in documents using **Tracked Search** are displayed in alphabetic order. Use the **Check All/None** checkbox to select or clear values you want to search.

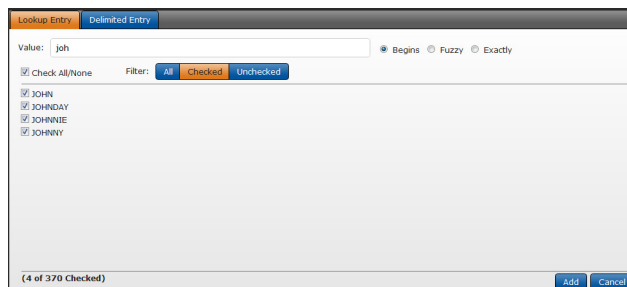
You can find values in the list by typing in the value or starting to type in the value with the **Begins** button selected, the system looks at the first 1000 words in the Facet. The Facet in Tracked Search is built on all of the values that appear in the body text of the documents.



Lookup Entry Filter

Use the checkboxes to select the values you want to add to the search.

You can also change the list that appears by clicking **Checked** or **Unchecked**. This may help you to more easily manage the list by showing you only the values you have selected (or only the values you have not selected).




You can also select the **All** option to show all the values in the list, whether selected or cleared. After you have selected your words, click **Add** to place them into **Tracked Search**.

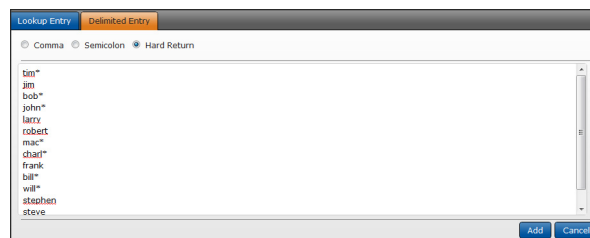
Delimited Entry of Values

Enter values into **Tracked Search** by either typing them in or by copying and pasting them from another file at the **Delimited Entry** tab.

Click the **Plus sign (+)** beside the **Tracked Search Connector** box that you want to populate and the **Lookup Entry** window will open.

Choose the **Delimited Entry** tab. In the text box, enter your values. You can select **Comma**, **Semicolon**, or **Hard Return** delimiters.

 Your values can contain wildcards.

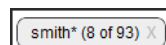


Click **Add** to add the values to the search.

Selected Words

Once you have selected your values, either by using **Lookup Entry** or **Delimited Entry**, the values will be displayed in the appropriate field of your screen. For example, if you are using the **Any of These** field to construct your search, this is the section that will be populated.

When you make selections using the **Lookup Entry** option, you will see your selected values and the number of values you selected out of the number of values available.



Click the value to see the details of the selection you made. You can adjust it in the **Edit Item** screen that displays this information. It works exactly the same way as the **Lookup Entry** screen.

If you make changes, click **Update** at the bottom of the screen.

When you select values using the **Delimited Entry** option, the number of values selected equals the number available. If the number is 1000, you have reached the maximum number of values. This may be due to a wildcard with too short of a root word.

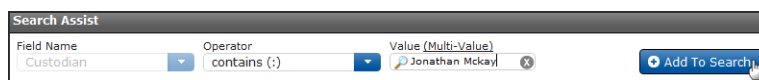


In this case, you should adjust the search, because it is likely too broad for practical purposes. Click the term to see the list of terms found and select as appropriate.

Custodians and Dates

In using **Tracked Search**, you may want to run searches using a limited list of custodians or a certain date range. These selections can be made in the sections **For These Custodians** and **For These Dates**.

Click the **Plus sign (+)** button next to **For These Custodians**, and the **Search Assist** window will open. The **Custodian** value will already be populated in the **Field Name** box. The **contains:** operator is also entered, but you can click the **Triangle** to select a different operator, such as **does not contain**. Select the **Value** by either typing into the box and selecting the value you want from the list, or by using the **Muli-Value** lookup.



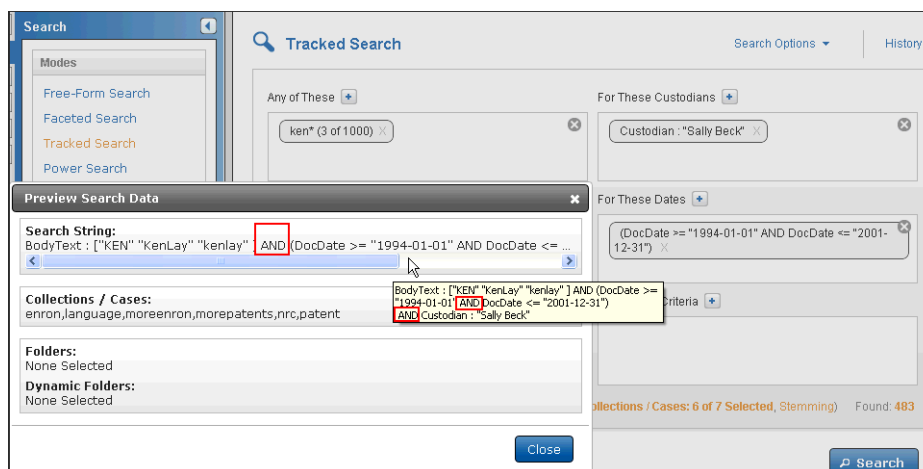
The **For These Dates** option works in the same way as **For These Custodians**. Click the **Plus sign (+)** button, and the **Search Assist** window will open. The **DocDate** value will already be populated in the **Field Name** box. Select the operator, and fill in the appropriate dates.

With These Criteria

You can add additional criteria to your **Tracked Search**. Click the **Plus sign (+)** next to **With These Criteria**. The **Search Assist** window will open and allow you to enter a search as with **Free-Form Search**.



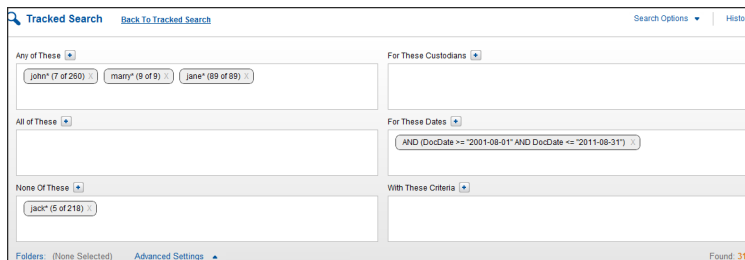
There is an AND Connector between each of the different **Tracked Search Connector** boxes. Open **Search Options** and click **Preview Search Data** to see the actual query you created using the **Tracked Search** interface.



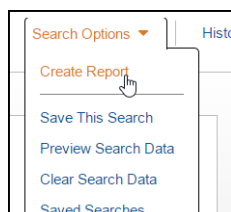
Creating Tracked Search Reports

In many cases, it is important to create reports for the defensibility of the searches you run. You can create reports to show the values available to you in **Tracked Search** and, perhaps most importantly, the values you did not select.

Below is a search created in **Tracked Search** to find seven values from the *john** search, nine values from the *mary** search and 89 values from the *jane** search. It is excluding five values of the *jack** search and is limited to a specific time range.



To create a report of your activities, from **Search Options** select **Create Report**.



Tracked Search Reports

Report Details

Report Details shows a summary of the search you implemented in the **Tracked Search** mode.

Report Details	
Case Name	insightdemo
Created By	pdaly
Date Created	2011-08-27T14:38:49.0094606-06:00
Collections Checked	patentpages,japanese,eronomi,eronompat,general
Folders Checked	(none)
Documents Matched	314
Documents Searched	1,099,856
Any of These Words	john*,mary*,jane*
All of These Words	(none)
None of These Words	jack*

Search String

Search String displays the query run by the search engine. This includes the **Facet** values you selected, the delimited entries you included and any other values you entered into the search.

In looking at the report, you may notice that your search needs adjusting. In the search above, *marry**, the only hits were the values *marrying* and *marryott*. This may not be what was intended when this search term was entered. Any values included in the **All of These** and **None of These** fields are also listed.

Search Options and History

Insight's **Search Options** can be accessed in any **Search** or **Results** page. At **Search Options** you can save a search or even a set of folder results as a saved search; you can also access previously saved searches, including Public searches and searches shared with you, preview the actual search query sent to the search engine and clear a search.

You can also preview the actual search sent to the search engine and clear all your current search data at **Search Options**.



Save a Search

Create a search, and then expand **Search Options**, and click **Save Search**. In the **Save Search** dialog box, name the search and set its access level.

Public Search: Typically, all users have access. **Private Search:** Only you have access to the search query. **Shared Search:** Only the user who saved the search and the users the search was shared with have access.

If you've selected **Public** or **Private** in the **Select Search Access** menu, click **Save**.

If you have chosen to create a shared search, click **Next** to designate the other users who should have access to your search.

Use the **Arrow** button associated with a user name to move the user from **Available Users** to **Selected Users**.

Remove a user's access to the saved search by using the **Left Arrow** button, placing the user name back into the **Available Users** list.

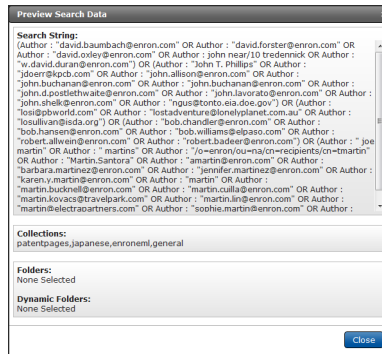
Find a user by entering all or part of the user name in the **Search** text box.

Use the **Triangle** buttons to move all users to or from **Selected Users**.

Click **Save**.

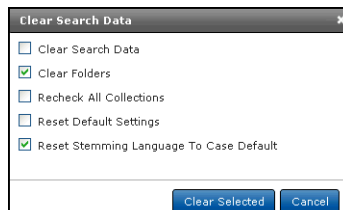
Preview Search Data

You can preview the exact search that is sent to the search engine by clicking **Preview Search Data** in the **Search Options** menu. This is especially helpful if you're searching for values using aliases and groups. The information includes the search string, against your chosen collections and folders, if applicable.



Clear Search Data

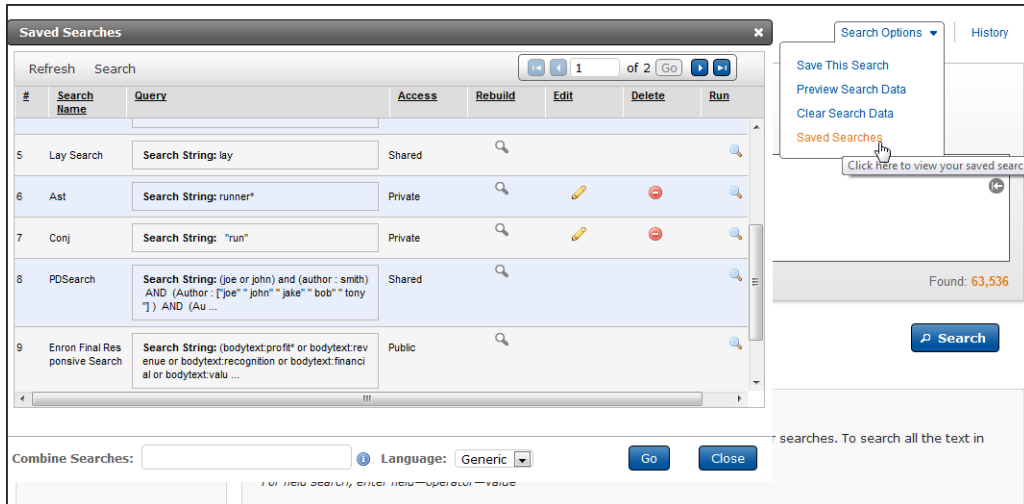
Expand **Search Options** at the top right-side of the screen, and select **Clear Search Data** to reset your search parameters. Select the settings you want to clear, and then click **Clear Selected**.



Saved Searches

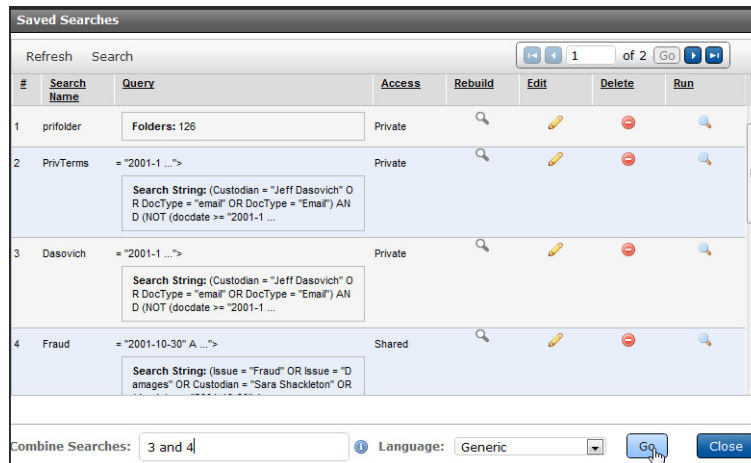
To run a saved search, click the **Saved Searches** link in **Search Options**.

Once you find your search in the list, click the **Run** (blue magnifying glass) button to execute the search.



If you have access to a long list of saved searches, you can click **Search** in the upper left and narrow down to your search by typing in the first letters of the search's name. You can also use the headers to sort the searches. If you created the saved search, you can change its properties (such as its name and the actual query) by clicking the **Edit** (pencil) button or remove it by clicking the **Delete** (minus) button.

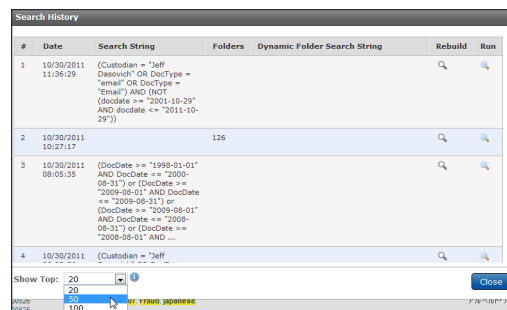
You can populate the **Free-Form Search** box with the query by clicking the **Rebuild** button. You can also combine searches; for example you could run search 3 **AND** 4. You could also use an **OR** connector to combine saved searches, such as 1 **OR** 5. Click **Go** and the search engine will execute your combination.



Search History

You have access to a log of the searches you've run even if you have not saved the searches.

Click **History** and in the **History** dialog box, find your search and click the **Search** button to run it again. Clicking the **Rebuild** button populates the **Search** box with the query, so that you can refine or edit the search if you wish. You can even set the number of past searches you'd like to see: 20, 50 or 100.



Power Search

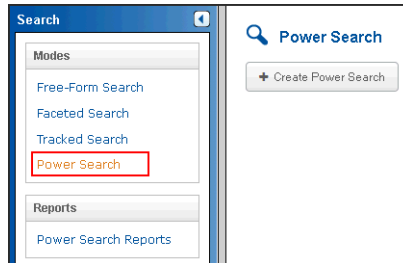
Use Insight's **Power Search** module to develop, organize and refine comprehensive sets of search queries. You can copy searches directly into the module or use the **Search Assist** to manually create and enter your search queries. Once entered, you can run the searches, report the hit count, including the total distinct hits, the number of documents returned and you can also select to include a total of the documents and their related documents. The total hit counts reflects the number of returns for all the searches you entered. Some of the same records may be returned in more than one of your queries, so this number may be larger than the number of total number of documents returned. You can also choose to return the total number of documents and related documents.

You also have the option of entering additional search criteria to create parameters (a scope) for your entire group of searches. Perhaps you need to run your searches against a particular requirement. For example, you need to run all your key terms within a date range. You can quickly do this and select the collections to search, and also select the document population's language to optimize your search results.

Power Search has a threshold of 1,000 queries per search group. When entering multiple searches, each term or phrase is considered one search. Perhaps you have several privilege terms that you need to search. If you use **Free-Form Search**, you can run one search with all your terms, but you will not have a breakdown for each term. You would have to search each term separately. **Power Search** allows you to add all your terms and then quantify the results by each term and quickly retrieve all the documents or just the documents meeting a specific term.

Create Power Search

Power Search is accessible from the **Search** menu. Click the **Search** button in Insight's main navigation bar and then select **Power Search**.

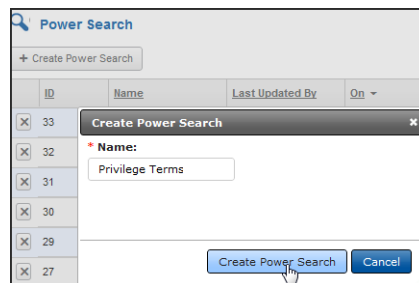


If search groups already exist in your site, you will see them in the table on this main **Power Search** page. You can open a search group by clicking its name. By default, the search groups are ordered chronologically. You can click a column header to sort by that information. The columns include the **ID**, which is a number given to the search group by the system, **Search Name**—the name of the group given by the user who created it, **Count of Searches**, which lists the number of actual queries in the search group, **Reports Run**—this number reflects the number of Power Search reports currently available in the system at Power Search Reports (it may not reflect the total number of times this search group has been run if some of the reports have been deleted), **Last Updated By**, which is the user who ran a particular search group, **On**—the date the search group was executed, and the next two columns display who created the search group and the date it was created.

The screenshot shows the 'Power Search' page with a table of search groups. The table has the following columns: ID, Search Name, Count of Searches, Reports Run, Last Updated By, On, and Created By. The row with ID 1620 and Search Name '2012.12.04-JP-01' is highlighted with a red box. Below the table is a pagination bar showing '1 - 24 of 24 total records at 50 records per page' and navigation buttons.

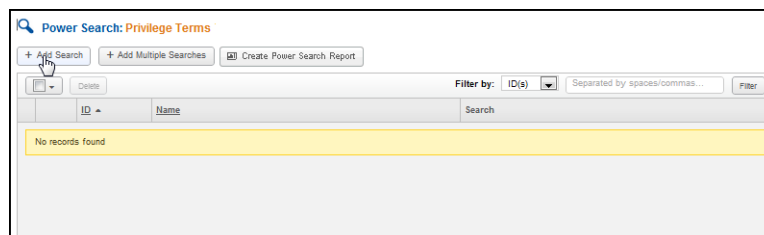
ID	Search Name	Count of Searches	Reports Run	Last Updated By	On	Created By
1689	Diacritic Sensitive Power Search Report	1	2	provisioner, Auto	2012-12-06 07:00:39 AM	provisioner, Auto
1620	2012.12.04-JP-01	1	1	provisioner, Auto	2012-12-04 09:21:45 PM	provisioner, Auto
1449	JP_20121009	1	0	provisioner, Auto	2012-11-28 10:26:16 AM	provisioner, Auto
1448	complex search	1	0	provisioner, Auto	2012-11-19 09:02:32 PM	provisioner, Auto
1161	loadtest	1	2	provisioner, Auto	2012-11-13 06:26:57 AM	provisioner, Auto
995	1000 Power Search Test	0	2	provisioner, Auto	2012-11-12 11:41:15 PM	provisioner, Auto
1012	TestPS	1	0	provisioner, Auto	2012-11-07 08:25:50 AM	provisioner, Auto
994	2012.10.22-JP-05	1	1	provisioner, Auto	2012-10-22 11:44:24 AM	provisioner, Auto

When entering a new set of search terms, your first step is to create a name for your group of searches by clicking the **Create Power Search** button. Then, give this overall grouping a name, and click the **Create Power Search** button in the dialog box.



Adding a Search using the Search Assist

There are two ways to enter searches into **Power Search**. You can manually create a search using Insight's **Search Assist** by clicking the **Add Search** button.



You can enter a name for the query or leave the **Name** box empty. You can build complicated queries with multiple clauses. If you are searching for terms, we recommend each term be entered as a separate search query so you can see the hit count for each term separately.

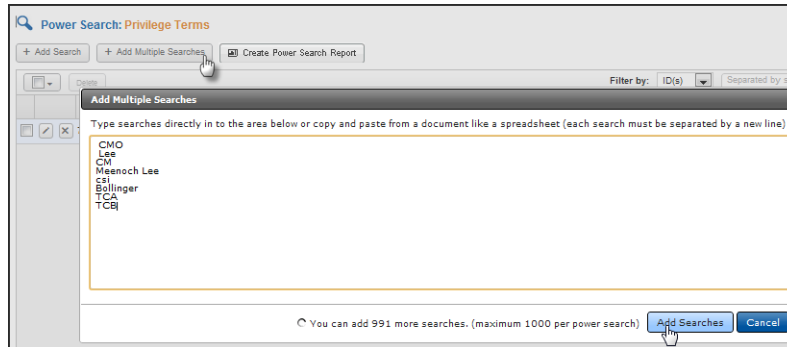
Use the menus to create your query and then click the **Add to Search** button to place your query into the **Search** box. You can also type directly into the **Search** box. This works identically to [Free-Form Search](#).

Click **Add Search** to place your query into your search group. If you have entered more than one term to the query, this is considered one search query by Power Search. It is important to use the correct type of search entry method in order to get the counts and results you need. If you want the individual counts for each term and to be able to quickly retrieve documents returned by a specific term, add your terms using the **Add Multiple Searches** button.

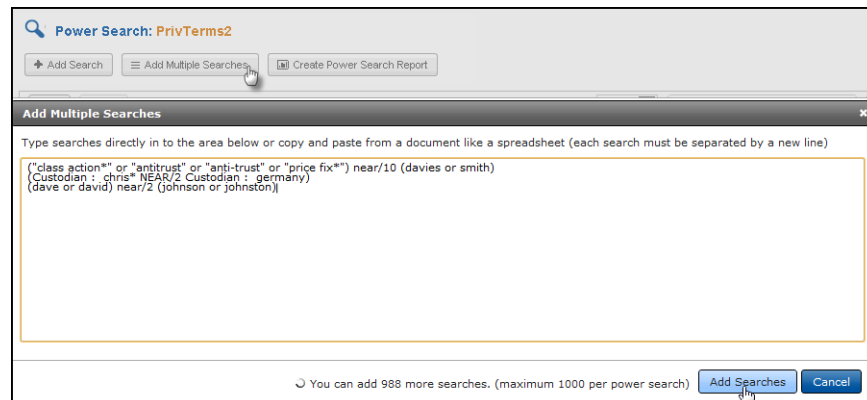
Adding Multiple Searches

The real power to **Power Search** is the ability to add multiple search terms or queries and retrieve the entire set of documents or just the documents meeting a specific term and quickly access search reports.

Click the **Add Multiple Searches** button. You can type directly in the box or copy your terms. Each term must be on a separate line, and you can see how many remaining searches you can add at the bottom. In the below example, **Power Search** will run a separate search for each term.

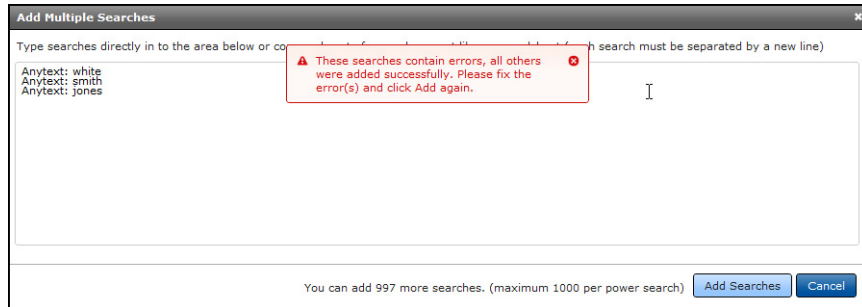


You are not limited to copying in simple terms or phrases. You can enter more complicated distinct searches at the same time.

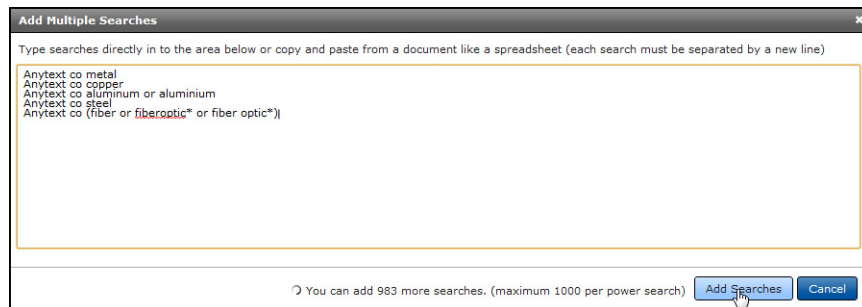


It is important that you understand Insight searching when entering complicated queries using the **Add Multiple Searches** function. If a search is not in Insight's acceptable syntax, you will get a warning.

As you know from using Insight's **Free-Form Search**, you cannot enter the **Anytext** field in the **Search** box. To search all the fields and the text of the records, simply enter the term or terms on separate lines. In the image below, the correct searches would be entered as white, smith, jones on separate lines.



Insight will not give you a syntax error if your searches are not recognized as incorrect Insight syntax. For example, perhaps you have received a list of search queries that were constructed in a different search engine syntax (in the below image, co is the contains operator where Insight uses the colon). When you copy these searches into the **Add Multiple Searches** box, you will not get a validation error.

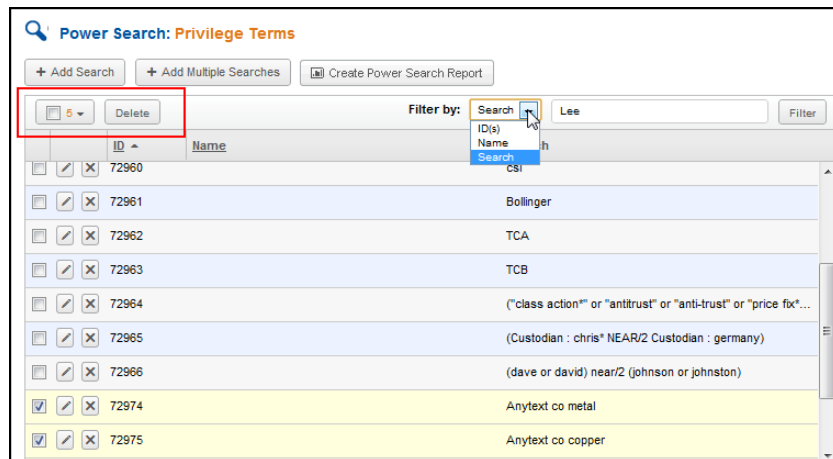


Insight will allow you to add these searches and run these searches, but your results will not be what you expect. Insight does not see these as incorrect syntax. Instead, it is implementing an Anytext search for the phrase “Anytext co metal” or “Anytext co copper” etc.

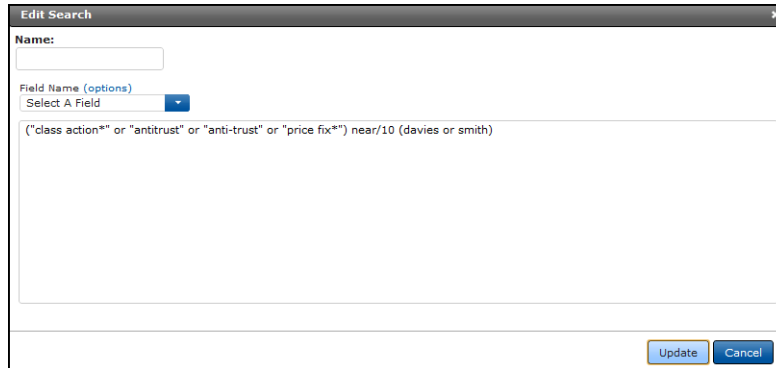
72974	Anytext co metal	0	0.0
72975	Anytext co copper	0	0.0
72976	Anytext co aluminum or aluminium	0	0.0
72977	Anytext co steel	0	0.0
72978	Anytext co (fiber or fiberoptic* or fiber optic*)	0	0.0

As you continue to add searches, they will appear in the table of your search group. The searches are ordered by **ID** number in descending order. Your oldest search is the top or first search. You can change the order by clicking the **ID** triangle, displaying the most current search query at the top of the list. You can find a search using the **Filter** menu to search by **ID**, **Name** or **Search** and then entering the information.

To delete all your searches, select the **All** checkbox beside the **Delete** button and then click the **Delete** button. You can also select specific searches using the checkboxes and clicking the **Delete** button, and to quickly delete just one search, click the **X** button.



To edit the search, click the **Edit** (pencil) button. This opens the **Search Assist**. Whether the search was entered with other searches using the **Add Multiple Searches** or you added it using the **Search Assist**, when you select to edit a search, the **Search Assist** opens. You now have the option to name the search, and you can edit it as necessary.



Create Power Search Report

When ready to run the searches in a **Power Search** group, open the group and click the **Create Power Search Report** button. This opens the **Search Assist**. If you want to create parameters (a scope) to limit your searches by certain criteria, use the **Search Assist** menus to create your query, or you can type directly into the **Search** box. You can also leave this empty if you do not need a scope. You can run your searches using a scope, then re-run them without one or change it to something else. As you add, change or remove a scope query, you will notice the **Total Documents To Be Searched** number will update.

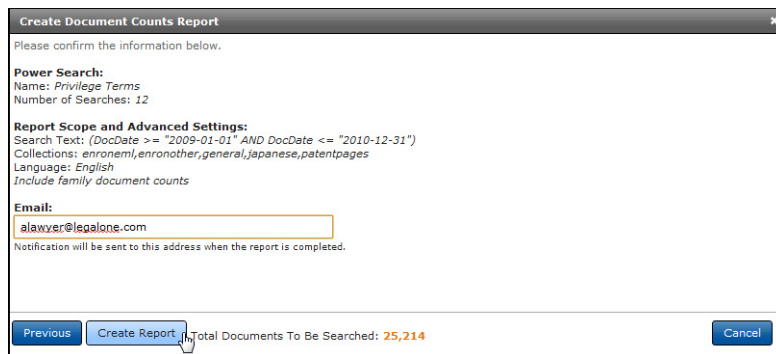


Click **Next** to select the collections of documents you want to search. If your documents are English, you can leave the **Language** menu empty; otherwise, select the appropriate foreign

language. This is especially important for languages that require tokenization (Chinese, Japanese and Korean (CJK)). If you want to include the family counts, select that checkbox and then click **Next**.



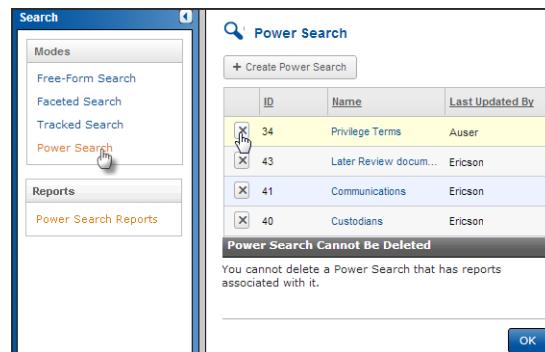
You will see a summary of the steps you've chosen. Enter your email address if you want to be notified when your report is ready and click **Create Report**.



You can retrieve your report by clicking **Power Search Reports** in the **Search** menu. You will not be able to open it until its status has changed from **Pending** to **Complete**.

Power Search Reports			
ID	Power Search Name	Status	Created By
38	Privilege Terms	Pending	
37	Privilege Terms	Compl..	

When you would like to remove a **Power Search** (named group of searches) in the main **Power Search** page, click the **Delete (X)** button. If a report is associated with the group, you cannot remove the group. First remove the **Power Search** at **Power Search Reports** (see below), and then you can remove the group.



Power Search Reports

You can monitor the status and retrieve information about **Power Search** groups by expanding the **Search** menu and clicking **Power Search Reports**. The executed **Power Search Groups** are listed in the **Power Search Name** column. The information in the table includes the ID number of each search group, the name, the status, including a status indicator, and the user who implemented the search group along with a time stamp. By default, the search groups are sorted by date and in descending order at the **On** column. You can reverse the order by clicking the **Triangle**. You can also sort by the other columns by clicking the column name.

Click the name in the row to open the group and display the queries, as well as the counts and to also gain access to the documents. (Search information is only available for search groups with the status **Complete**.) You can remove a report from the site by clicking the **Delete (X)** button in the first column of the row.

Power Search Reports: PrivTerms2

Print Preview

Documents Searched	Total Docs	Unique Docs	Docs + Attachments
55,108	1,305	1,181	2,575
<small>Based on the report criteria</small>	<small>If run separately</small>	<small>If run together</small>	<small>Documents with families</small>

ID	Search	Document Count	Family Document Co...	Percentage of Documents
91917	Report Scope And Advanced Settings Search Text: DocDate <= "2011-01-01" Collections: enron, general Language: eng	555	1,088	1.0
91918		2	2	0.0
91919	"white" near/1 "lawfirm" near/1 ".com"	0		0.0
91920	"michael" near/2 "lawfirm" near/1 ".com"	0		0.0

Documents Searched displays the set of documents the search was run against. Point to the **Information (i)** button to see the parameters for the document set. (For example, if a scope was created, this information will be displayed, as well as the collections and any other advanced search settings used.)

You can bring back all the documents the search was run against by clicking the number in the **Documents Searched** section. The counts in blue font are enabled hyperlinks that bring back the documents in the **Results** page.

The **Total Docs** number reflects the number of returns for all the searches entered. Remember that some of the same records may be returned in more than one search query in the **Power Search Group**, so this number may be larger than the number of total number of documents returned.

The **Documents Found** number displays the actual number of documents found. Clicking the count will bring back all the records returned for this search group.

If the group includes the related documents, the **Docs + Attachments** section shows the combined number of documents returned for your search with their related documents.

Power Search Reports: Priv Enron Firm Bodytext Only

Print Preview

Documents Searched 835,720	Total Docs 8,119	Unique Docs 6,388	Docs + Attachments 15,642
Based on the report criteria	If run separately	If run together	Documents with families

ID	Search Name	Search	Document C
34028		bodytext: "Foley.com" or (bodytext: foley near/2 bodytext: lardner)	35
34029		bodytext: Martin near/2 bodytext: Weinstein	10
34030		(bodytext: Vinson near/2 bodytext: Elkins) or bodytext: "velaw.com"	2,048
34031		(bodytext: Rob* near/2 bodytext: Mazer) or bodytext: "rmazer@velaw.com"	1
34032		bodytext: "Stoel Rives" or bodytext: "stoel.com"	190
34033		bodytext: Mark near/2 bodytext: Tuohy	61
34034		(bodytext: Stephen or bodytext: steve)near/2 bodytext: Hall	571
34035		(bodytext: Joe or bodytext: Joseph) near/2 bodytext: Dila	39

1 - 23 of 23 total records at 250 records per page

The table provides a breakdown on the search queries that make up the **Power Search Report**.

If the search query was named, this will appear in the **Name** column. (This is not required when adding search queries.)

At **Search**, the query is listed. To bring back documents found by a specific search query, click the query (blue font) in the appropriate row.

Use the page navigation buttons at the bottom if there is a long list of queries. When you run a query, you may notice the number of documents found in the **Results** does not match the number displayed in the **Document Count** column. If you want to bring back only the documents that hit when the **Power Search Report** was created, set boundaries so that your search brings back only those documents (for example, you can set up an uploaddate restriction or scope).

The **Family Document Count** column contains the total number of documents for a query plus any related documents.

The **Percentage of Documents Searched** column lists for each query the percentage of documents that returned for this query based on the number of total documents searched.

Power Search Reports: Priv Enron Inside Bodytext Only

Created by Jim Eidelman
2013-05-15 09:19:56 AM GMT-4:00

Print Preview

Documents Searched	Total Docs	Unique Docs	Docs + Attachments
835,720	28,448	18,409	28,318
Based on the report criteria	If run separately	If run together	Documents with families

	Document Count	Family Document Count	Percentage of Documents Searched
ear/2 bodytext: rogers	666	1,095	0.1
giere or bodytext: dperlin	927	1,640	0.1
near/2 bodytext: Keiser	335	474	0.0
* near/2 bodytext: yoder	1,118	1,938	0.1

Clicking a link in the **Power Search Reports** page opens the **Results** page. Return to the report by clicking **Back to Report**.

Results [Back to Report](#)

Search Text: 4 Collection(s) Found: 67,401

Table Actions Display Options

	FileExt	DocDate	Confidential
	ReqControl	Hotfile	Author
	DocId	UploadDate	
1	ppt 402330007902 67724	2000-11-08 2013-02-02 08:18:50 PM	
2	zip 4023300005489 65311	2000-05-12 2013-02-02 08:18:50 PM	

You can download your list of searches when in Power Search by clicking **Download**. This opens your search list in an Excel spreadsheet.

You can also download a report. Click the **Download** button after opening your report. This will export the searches into an Excel spreadsheet. To print the report, click the **Print Preview** button. You can sort in ascending or descending order on the column of your choice if you would like to tailor the print version of the report. Click **Print** when ready.

Power Search Reports: A Demo Search

2014-05-06 10:17:06 AM GMT-4:00 [Print Preview](#) [Download](#)

Documents Searched 422,146 Based on the report criteria ⓘ	Total Docs 94,684 If run separately	Unique Docs 69,720 If run together	Docs + Attachments 69,733 Documents with families
--	--	---	--

ID	Search Name	Search
1425	jones	
1426	lay	
1427	faustow	
1428	smith	

1 - 162 of 162 total records at 250 records per page

<< < 1 of 1 Go > >>

Remember when you click the **Unique Docs** number or a specific query, the **Results** page will display. You will be able to review those found documents, copy them to a folder, bulk update or take any of the **Results** page **Actions** you have permissions to use.