

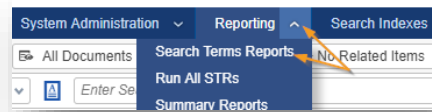
# How To: Create a Search Term Report (STR)

A Search Term Report is used to create reports on search results and to tag documents that hit on those terms. Once a STR is created and ran, any documents that hit on a term in the report are tagged under the STR field and a choice is added for the term or terms the document hit on.

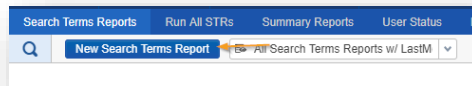
In this document we will walk you through the process of creating a STR. If you have any questions, please feel free to contact your Lighthouse team member.

To create a STR you need to be part of user or security group that has access to the tab **Reporting** and the option **Search Term Reports**. You will also need to verify that you can add search terms to the report. Check with your Project Manager to make sure you have the correct permissions.

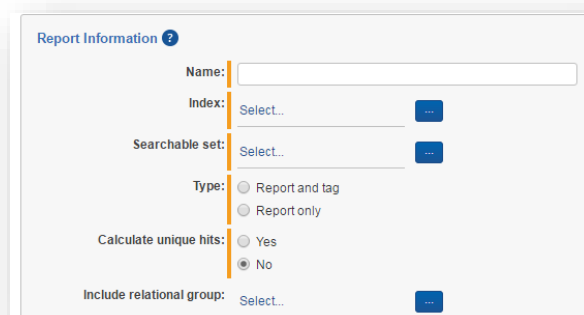
1. Click on the **Search Terms** tab followed by **Search Term Reports** as shown below.



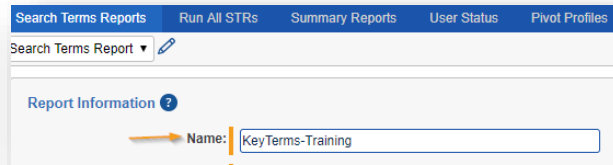
2. Next, select **New Search Terms Report** as shown below.



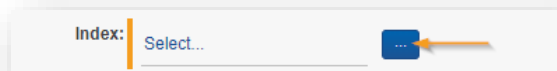
3. As shown below there are several required fields that need to be completed to create your STR. All required fields are displayed in Orange.

A screenshot of the 'Report Information' form. The form contains several fields: 'Name' (text input), 'Index' (dropdown menu), 'Searchable set' (dropdown menu), 'Type' (radio buttons for 'Report and tag' and 'Report only'), 'Calculate unique hits' (radio buttons for 'Yes' and 'No'), and 'Include relational group' (dropdown menu). The labels for 'Name', 'Index', 'Searchable set', and 'Include relational group' are highlighted in orange to indicate they are required fields.

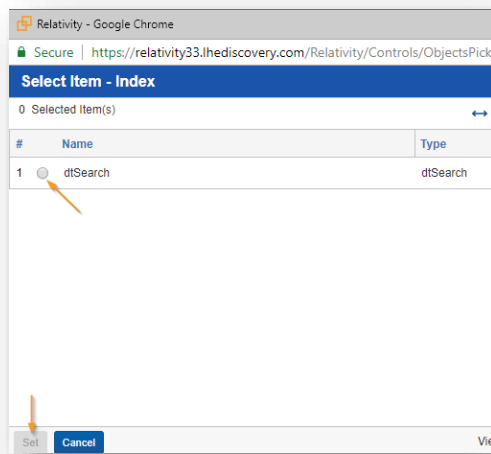
4. Enter a name for your STR. Since this name will become a field name in your database use a short but descriptive name. In the example we have enter **KeyTerms-Training**. This will become a field named **STR- KeyTerms-Training**.



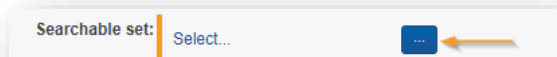
5. Next under **Index**: Select the ellipses icon as shown below.



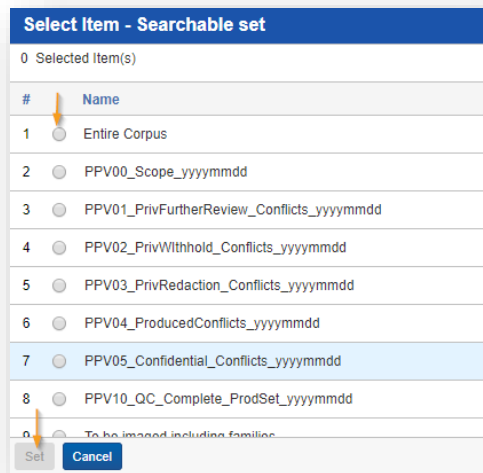
6. In the next pop-up window select the **dtSearch** index listed. If you have more than one index listed, make sure the index you select contains all the documents you included in the STR. After selecting the radio button click **Set**.



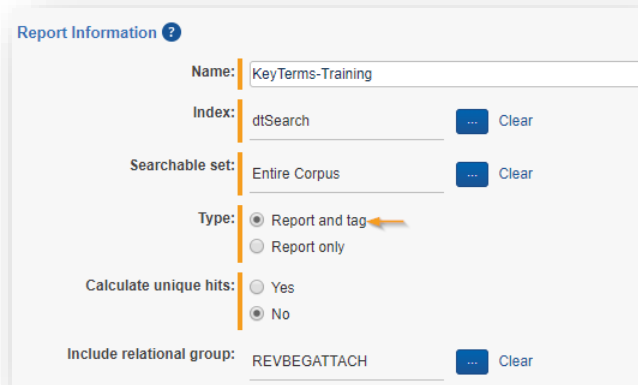
7. Next select the ellipses icon for searchable set.



8. This opens another pop-up window with a list of all saved searches. Either scroll through the list or use the filter icon to find and select a search that returns the documents the Search Term Report should be ran across. In most cases this a search named **Entire Corps** as shown below. Once you have the Searchable set select click **Set**



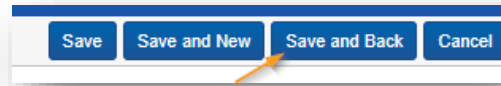
- Next with the **Name** entered and both **Index** and **Searchable Set** selected, select the type of report to generate: **Report and tag**, generates a report showing all hits per term, creates a field and tag all documents with the STR name. Selecting, **Report only** will generate a report. In this example we selected **Report and Tag** as shown above.



- Next under **Calculate unique hits**: Relativity will include whichever selected relationship selected from the drop-down menu. In this example we have selected **Yes** as shown below. If yes is selected Relativity creates two STR's created one with the related documents and one without. In this example we have selected **Yes** and Families or BegAttach. This will create two STR's visible in the Field Tree view.



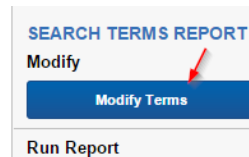
11. Once you have completed this stage click **Save and Back**



12. Once returned to the list of **Search Terms Reports** select the report name you just created as shown below.

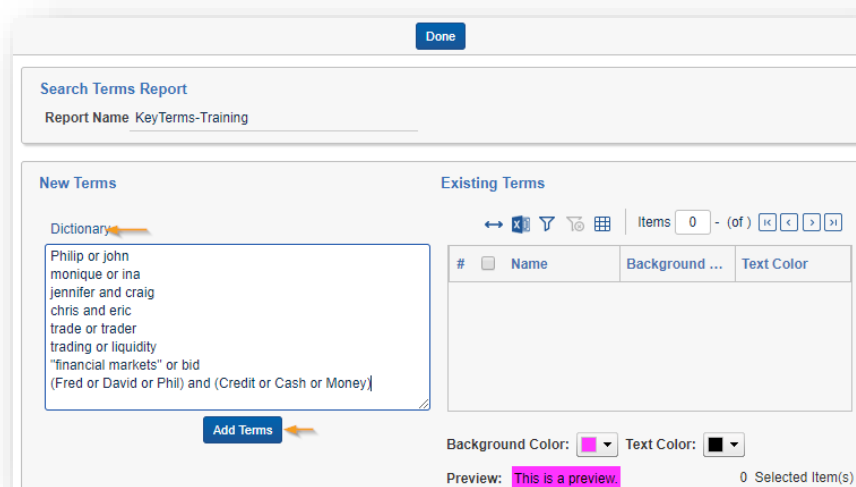
#		Name	Index	Type
1	<input type="checkbox"/>	<a href="#">Edit</a> <b>Sample 1</b>	dtSearch	Report and tag
2	<input type="checkbox"/>	<a href="#">Edit</a> <b>KeyTerms-Training</b>	dtSearch	Report and tag

13. With the report open select the option on the far right of the screen **Modify Terms** as shown below. **NOTE:** To modify the terms entered or add additional terms later, select **Modify Terms**.

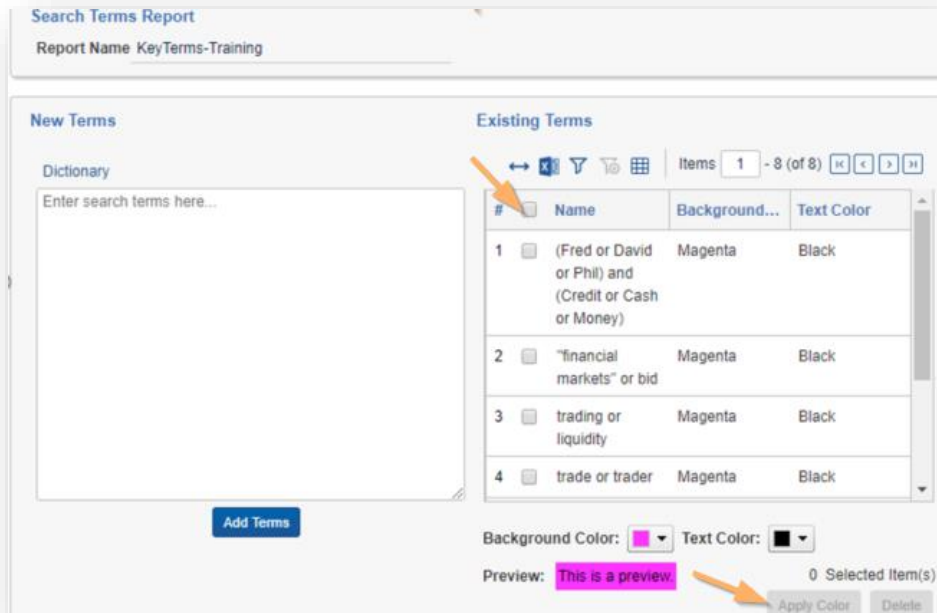


14. The next screen is divided into two. On the left of the screen you will enter the terms for the STR on the right of the screen is a list of your existing terms. The dtSearch dictionary function is also available to help with misspelled and stemmed variations of the words. Paste your list of terms into the New Terms window as shown below.

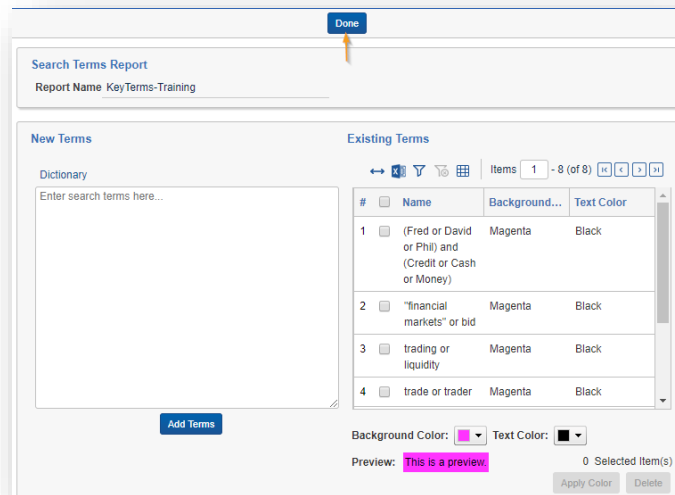
**NOTE:** STR's use the dtSearch index supporting standard Boolean format, both wildcards (\* and ?) and Proximity operators.



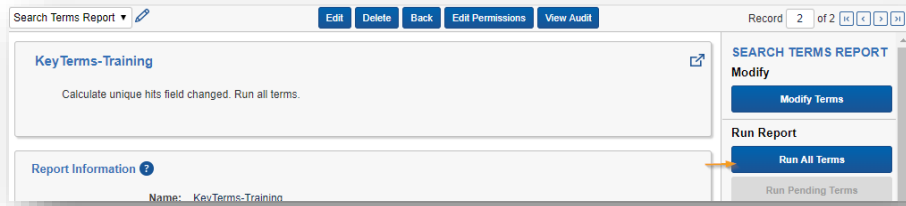
15. In the example below, we have clicked **Add Terms** to move the terms to the right of the screen as shown below. If you would like to use the STR as a Persistent Highlight Set, select the top checkbox of the **Existing Terms** and click **Apply Colors**.



16. Once you're comfortable with your terms click **Done** at the top of the screen to complete adding terms.

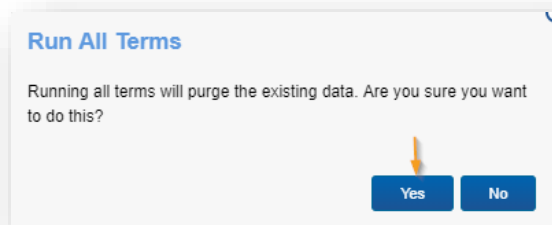


17. Next you are returned to the **Search Term Report** window shown below. Here you can modify your terms and verify the report information or setting. Once comfortable with your terms and entries click **Run All** Terms to create the STR.

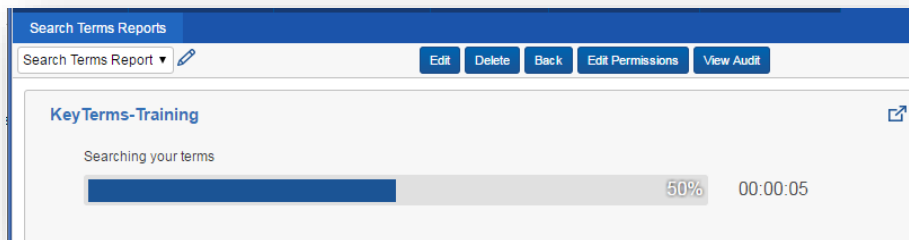


**NOTE:** If you have already run terms and are adding additional or modifying existing terms, once you have finished, select the option Run Pending Terms found directly under Run All Terms.

18. Once **Run All Terms** or **Run Pending Terms** is selected the system will prompt you with the message below. Click **Yes** to continue.



19. A status bar is displayed while the STR is being created. A pop out option is also available allowing you to work on other projects while the report is in progress.



20. Once complete, the system will display the results showing, Total with Hits and links to view the reports on the right of the screen.

**KeyTerms-Training**

Status:  Completed

Document Breakdown		Information	
Total with Hits:	132	Number of terms:	8
Total with Hits + Families:	202	In Searchable Set:	500

Report Information

Name: KeyTerms-Training

Index: dtSearch

Searchable set: Entire Corpus

**SEARCH TERMS REPORT**

Modify

Run Report

Results

Errors

These screen captures display the reports provided from the STR process.

**Spectra - REFort Search Terms Report**

Report Name: KeyTerms-Training Searchable Set: Entire Corpus

Category	Count
Total documents with Hits	132
Total documents with Hits, including Families	202
Total documents without hits	298

**Results Summary**

Documents in searchable set	Total documents with hits	Total documents with hits, including Families	Total documents without hits
500	132	202	298

Term	Count
"financial markets" or bid	18
(Fred or David or Phil) and (Credit or Cash or Money)	44
chris and eric	2
jennifer and craig	0
monique or ina	0
Philip or john	32
trade or trader	58
trading or liquidity	40

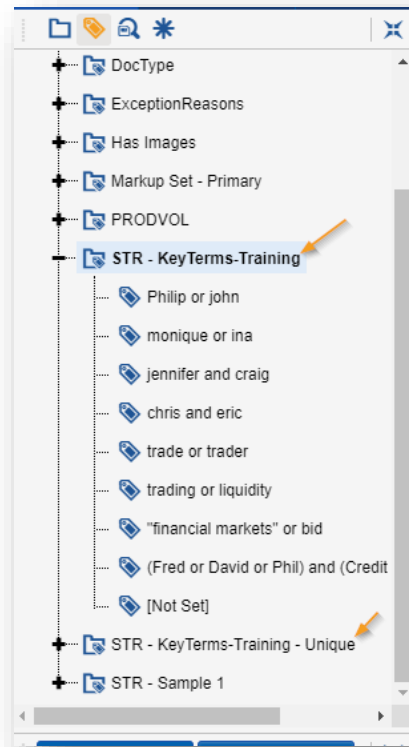
**Terms Summary**

Term	Documents with hits	Documents with hits, including Families	Unique hits
"financial markets" or bid	18	78	4
(Fred or David or Phil) and (Credit or Cash or Money)	44	84	24
chris and eric	2	2	2
jennifer and craig	0	0	0
monique or ina	0	0	0
Philip or john	32	86	20
trade or trader	58	132	26
trading or liquidity	40	96	10

Report Generated: 8/31/2018 2:05:23 PM Page 1 of 1

The Search Term Report field(s) can also be selected as a field in saved searches, displayed on a coding forms and used to control documents that are returned in a Document list view.

Field Tree, which is visible from the documents list view by clicking the ticket icon displays two versions of the STR. One including related documents and the other just the Unique documents. Each term is displayed as a choice for that field or report.



We hope this information is helpful. For additional assistance please feel free to contact your Lighthouse team member.