



# Relativity<sup>®</sup>

## Search Hit Report Manual

Version 5.09  
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# 1 Overview

Welcome to the Search Hit Report Manual.

Search hit report allows you to input a list of search terms. Based on these terms, a report is generated that shows the document count for each search term hit. A field is created that houses the corresponding terms found in each document. This field can be used in the choice tree to view the search terms and their document hits.

This feature can be added to Relativity 5.06 or above.

# 2 Importing the Search Hit Report Tool

Before you can use search hit report in your Relativity environment, it must be installed using the Relativity Desktop Client Application Import mode. The installation file is located on the [Relativity Customer Portal](#).

1. Log in to the Customer Portal and select the Content tab. In the Search in drop-down, select **Documentation**.

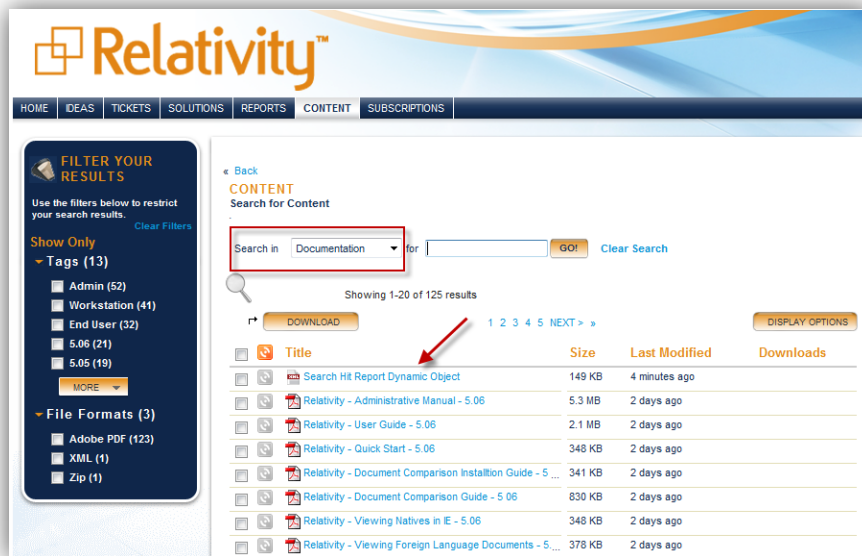


Figure 2-1: Customer Portal

2. Locate the **Search Hit Report Dynamic Object xml** file and **save** it to your local machine.
3. Open the Relativity Desktop Client and enter your login information.

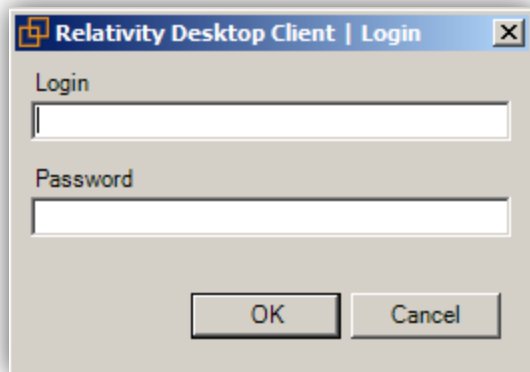


Figure 2-2: Login

4. Click **OK**.
5. Use the filter bar to locate your case in the list and click **OK**.

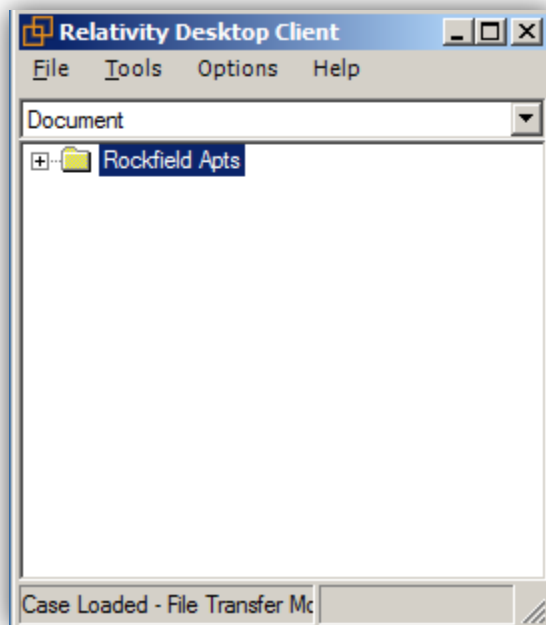


Figure 2-3: Relativity Desktop Client

Your case appears in the Relativity Desktop Client. The menu bar includes:

- **File**
  - Open allows you to switch between different cases.
  - Exit closes the Desktop Client.

- Refresh updates the folder browser.
  - **Tools**
    - Import
      - Image File imports images from a page-level load file.
      - Document Load File imports native files, document metadata, and extracted text from a document-level load file.
      - Production File imports production data and images from a page-level load file.
      - Application imports Relativity dynamic object applications from a load file. These applications are available on the Relativity Customer Portal. Contact [support@kcura.com](mailto:support@kcura.com) if you do not have an account.
    - Export
      - Production Set exports a production set.
      - Saved search exports from a saved search.
      - Folder exports from a specific folder.
      - Folder and Subfolders exports from a specific folder and its subfolders.
  - **Options**
    - Settings allows you to change your Webservice URL.
    - Check Connectivity assists in troubleshooting any network and system configuration errors that were encountered during imports and exports.
  - **Help**
    - About provides you with information about the Desktop Client Version.
  - The drop-down allows you to set the object type. You can import data for any object type in your case. At this time, you can export only document data.
6. Select **Tools | Import | Application**.

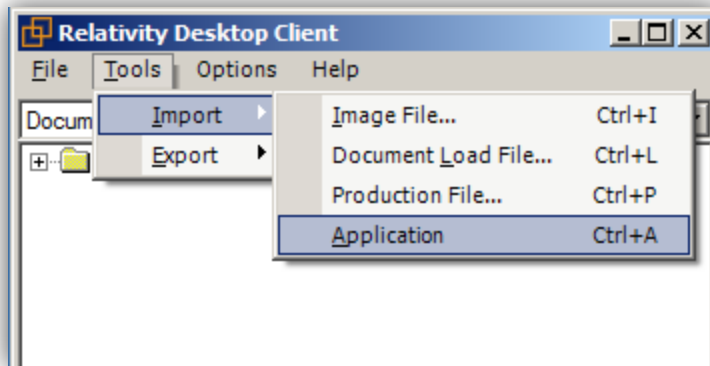


Figure 2-4: Import Application

7. The Import Application File dialog box appears. Click the **ellipsis (...)** button.

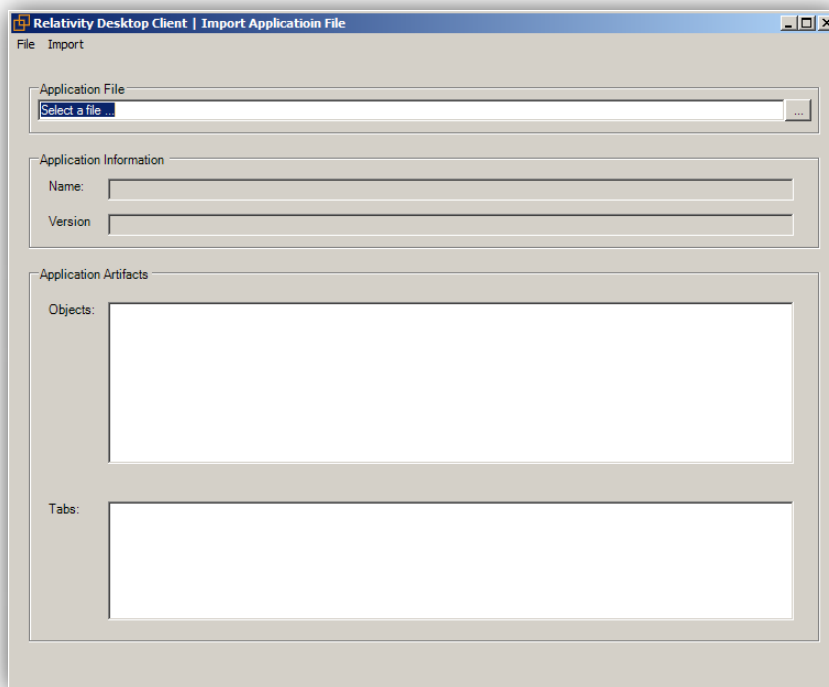


Figure 2-5: Import Application dialog box

8. Locate the **searchhit.xml** file on your local machine and click **Open**.
9. The Name, Version, and Objects textboxes are populated. Select **Import | Import Application**.

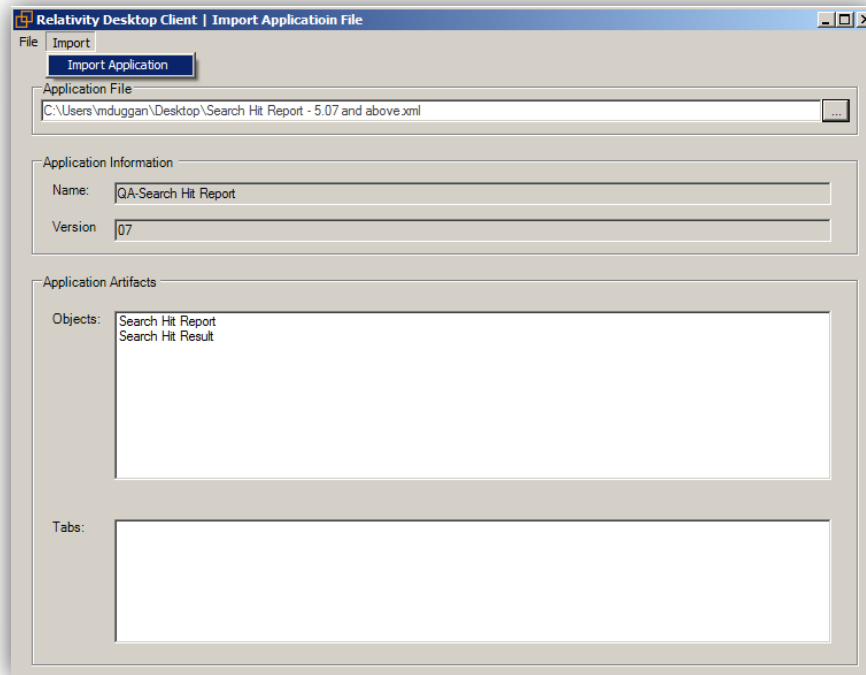


Figure 2-6: Import Application

10. The Application Deployment System dialog box appears when the import is complete.

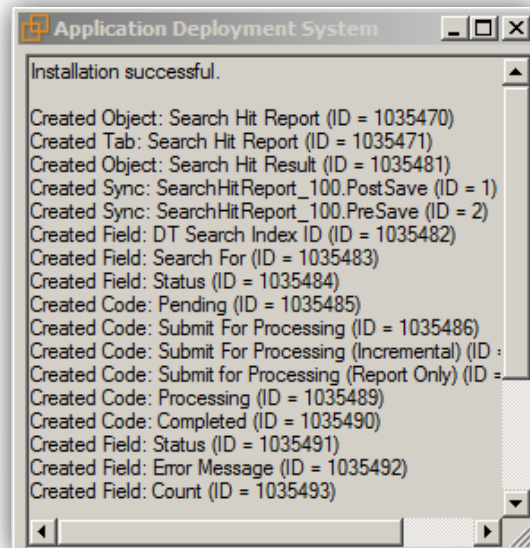


Figure 2-7: Application Deployment System dialog box

11. Return to your case in Relativity. The Search Hit Report tab will appear in the tab bar.



Figure 2-8: Search Hit Report tab

### 3 Adding the DTSeach Hit Count Agent

The next step is to configure the DTSearchHitCountJobManager agent.

1. Go to the Agent Server - **[installation directory]\kCura Corporation\Relativity\Agents**
2. Locate the **KcuraAgentManager.exe.config** file and open using text editor.
3. Add the following lines:

```
<configSections>
    <section name="kCura.Agent.Agent#"
        type="System.Configuration.DictionarySectionHandler,
        System, Version=1.0.3300.0, Culture=neutral,
        PublicKeyToken=b77a5c561934e089" />
</configSections>
<kCura.Agent.AgentManager>
    <add key="NumberOfAgents" value="13" />
</kCura.Agent.AgentManager>
<kCura.Agent.Agent#>
    <add key="AssemblyPath" value="[Installation
    Directory]\kCura
    Corporation\Relativity\Agents\bin\kCura.EDDS.Agents.dll" />
    <add key="ClassName"
        value="kCura.EDDS.Agents.DTSearchHitCountJobManager" />
    <add key="Interval" value="5000" />
    <add key="UseFixedInterval" value="false" />
</kCura.Agent.Agent#>
```

4. **Restart** the EDDS Agent Server to confirm the changes before returning to Relativity.

### 4 Creating a New Search Hit Report

Now the setup has been complete you can begin to create the required search hit reports.

Select the **Search Hit Report** tab and click the **NewSearchHitReport** button.

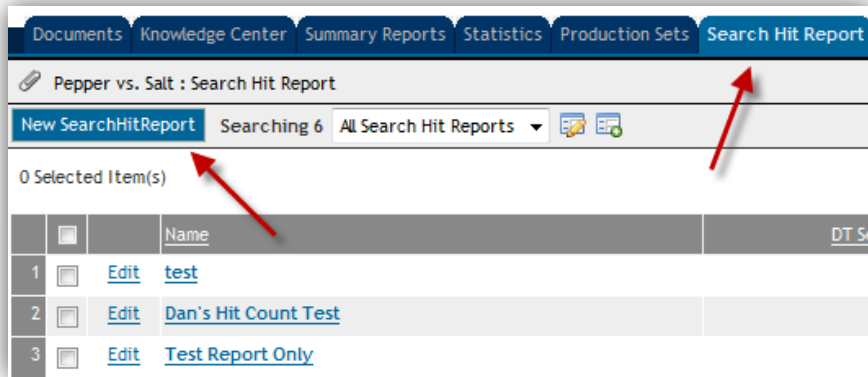


Figure 4-1: New SearchHitReport button

The New Search Hit Report form appears, with required fields in orange and optional fields in gray.

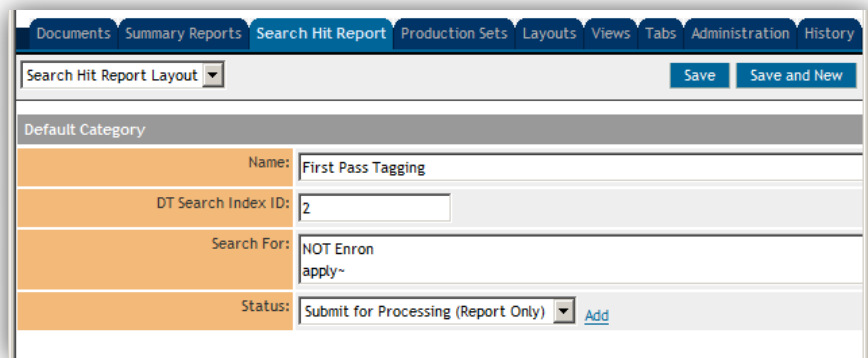


Figure 4-2: New Search Hit Report form

The following fields are present in the form:

- **Name** is the search hit report's name.
- **dtSearch Index ID** is the index number of the desired dtSearch index. For more information, see Section 6.
- **Search For** is the textbox where your search terms are entered.



Each line of the Search For box is treated as an individual dtSearch query. For more information about dtSearch, see the [Relativity Searching Guide](#).

- **Status** is the status of the report. It can also be used to determine the output of the report:
  - **Submit For Processing** creates a new field and tags the hits of each entered search term. It also generates a report outlining the frequency of hits.
  - **Submit For Processing (Incremental)** tags the hits of each search term and places the results into the existing field created during the report's first processing. Unlike the previous option, this status will only report on documents that have not been previously tagged.



Submit for Processing (Incremental) is used when you would like to search and tag new documents using an existing search hit report.

- **Submit For Processing (Report Only)** searches the indexed documents for the entered search terms. Unlike the previous options, this status does not tag terms or create a field outlining the search results. However, this status is useful if you wish to view search results without applying tags to your documents. It also returns results more quickly than other statuses.



When creating a search hit report, disregard Completed, Pending, and Processing; they are used by the system to define overall report status.

There are four buttons available at the top of the form:

- **Save** records the entered information.
- **Save and New** records the entered information and launches a blank New Search Hit Report form.
- **Save and Back** records the entered information and redirects you to the Search Hit Report Details Page.
- **Cancel** ends the report creation process and redirects you to the Search Hit Report Details Page.

## 4.1 Search Hit Report Results

After saving your report information, the Search Hit Report Details Page appears and displays the search results, as shown in Figure 3-3.

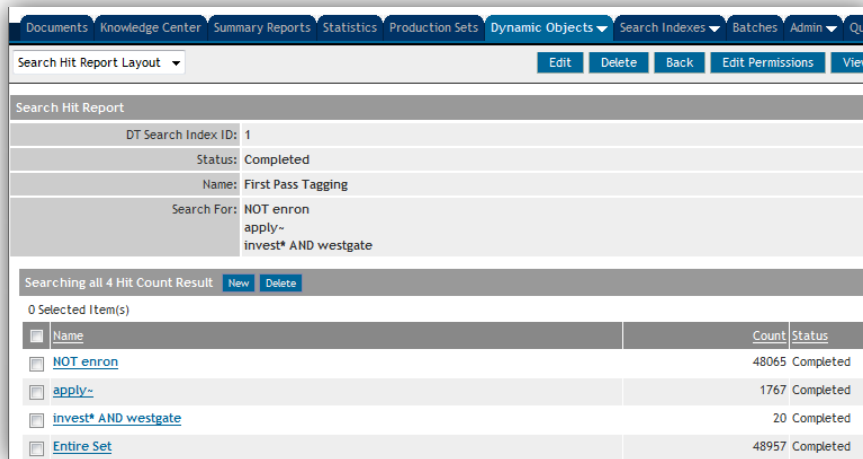


Figure 4-3: Search Hit Report Details Page

The report results appear at the bottom of the screen and outline the entered search terms and the amount of documents that were tagged for each. The results include:

- **Name** is a linked search term. Each link corresponds to a search term entered in the Search For textbox, located in the New Search Hit Report form. Refer to Figure 2-2.
- **Count** is the number of documents tagged with the search term.
- **Status** is the current progress of the report. This field will contain one of three values: Pending, Processing, or Completed.
- **Error Message** displays any errors encountered during processing.



Be aware that the search hit report results appear as they are processed. Refer to the Status field of each search term to check its progress.

The Search Hit Report Details Page also allows you to perform the following actions:

- **View** the search hit report information
- **Add** new search terms



If you add new search terms to your search hit report, it must be processed again using the Submit for Processing (Incremental) status.

- **Delete** existing search terms
- **Filter and sort** search results
- **Export** search results to Excel

There are five buttons available at the top of the page:

- **Edit** allows you to edit the search hit report information opening the Search Hit Report Details page. Within this page, there are five buttons available:
  - **Save** records the entered information.
  - **Save and Next** records the entered information and moves to the next search hit report in the list. This option is only available if your case has more than one search hit report.
  - **Save and New** records the entered information and launches a blank New Search Hit Report form.
  - **Save and Back** records the entered information and redirects you to the Search Hit Report Details Page.
  - **Cancel** ends the editing process and redirects you to the Search Hit Report Details Page.
- **Delete** removes the search hit report from Relativity.
- **Back** redirects you to the search hit report list.
- **Edit Permissions** allows you to set the search hit report permissions. These permissions determine which groups have access to the report.
- **View Audit** displays the search hit report audit history.

## 5 Viewing Search Hit Report Results in the Choice Tree

You may want to view the results of your search hit report in the choice tree. To accomplish this, edit your automatically-created search hit report field. If you are unfamiliar with this process, contact your system administrator.

1. Select the **Fields** tab and filter to the field by entering the name of your search hit report. In this example, the report is called First Pass Tagging.

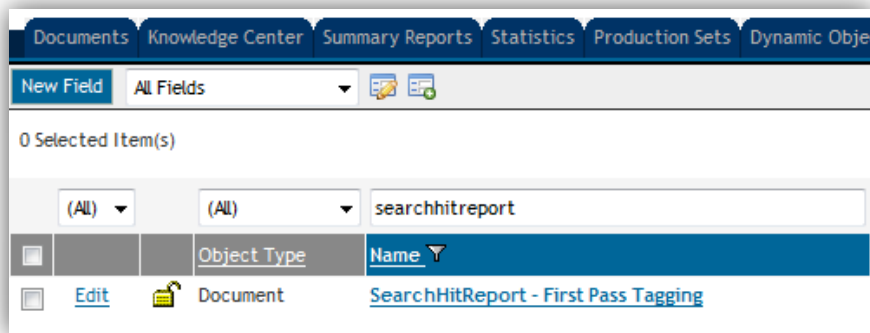


Figure 5-1: Field view

2. Click the **Edit** link.

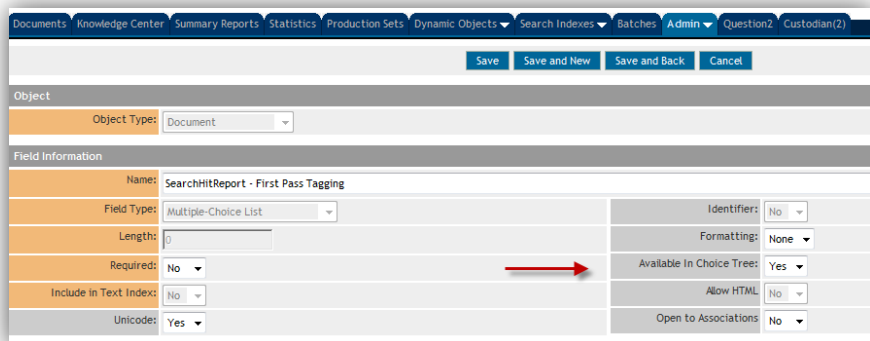


Figure 5-2: Field form

3. In the Field Information section, select **Yes** in the Available in Choice Tree drop-down.
4. Click **Save**.

## 5.1 Viewing Hits in the Choice Tree

After enabling the search hit report field's availability in the choice tree, you may view documents tagged with the Hit Count report search terms.



This option only applies when reports have been run as Submit For Processing or Submit For Processing (Incremental).

Results returned from a Submit for Processing (Report Only) will not be tagged.

1. Select the **Documents** tab and click the **Choice Tree** icon.
2. Locate the search hit report field. This name listed as **SearchHitReport <your report name>**.

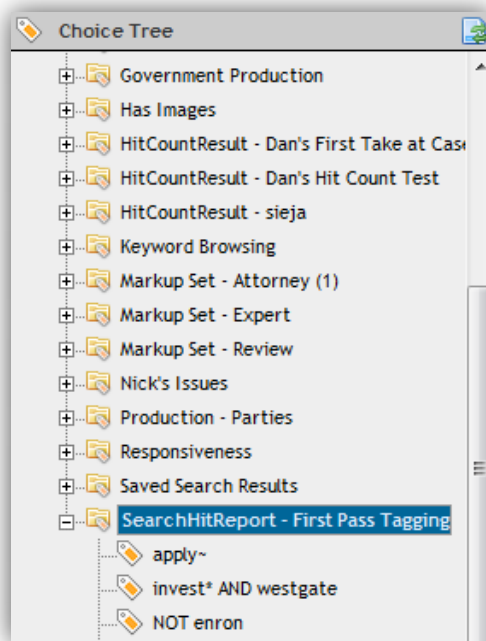


Figure 5-3: Choice Tree

3. Expand the **result folder** and click through the search term tags beneath. The documents tagged with each term appear in the view.

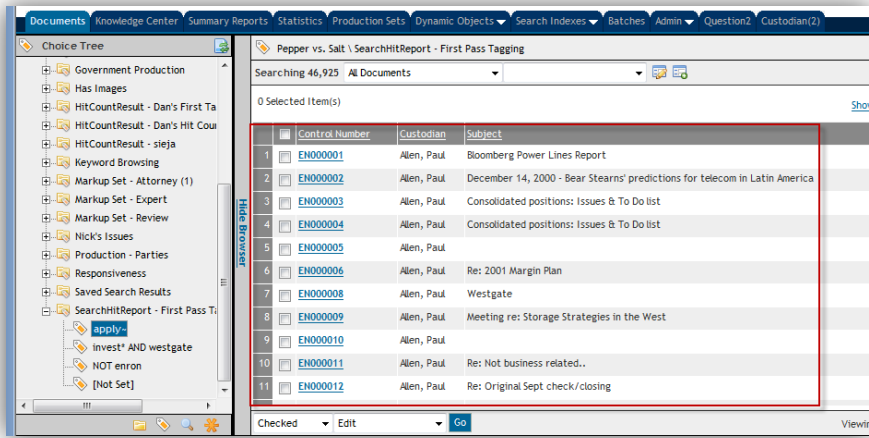


Figure 5-4: Search hit report results

## 6 Determining the dtSearch Index ID

1. To determine the ID of the dtSearch index to be referenced in your search hit report, select the **Search Indexes** tab.

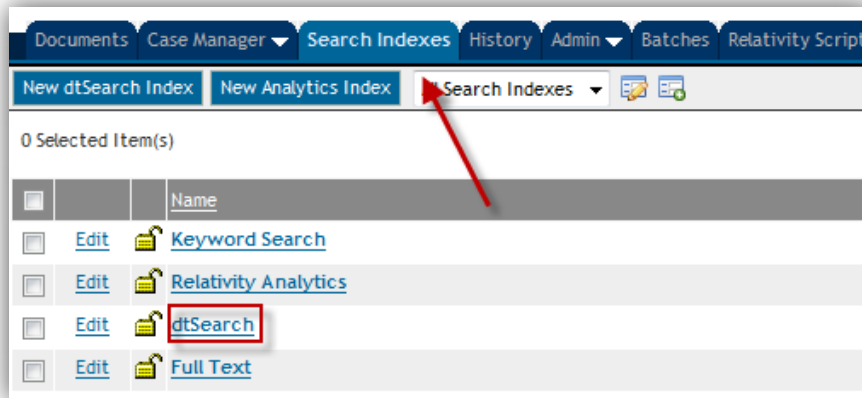


Figure 6-1: Search Indexes list



Search hit reports are created based on a selected dtSearch index number. Before creating your report, select or create the index to be referenced. For more information about dtSearch indexes, see the [Relativity Searching Guide](#) for more information about dtSearch indexes.

2. Click the **Name** link of the dtSearch index to be referenced.
3. Refer to the **Population Table Name** in the Index Information section. Locate the **index number**, which appears at the end of the entry. In this example, the index number is 1, as shown in Figure 5-2.

Index Information	
Name:	dtSearch
Order:	1
Searchable Set:	<all documents in case>
Index Share:	\\relativitytest1\DTSearchIndexShare\
Population Table Name:	dt_POP_1

Figure 6-2 Index Information

## 7 Disclaimer

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