



## Quick Guide to Fields, Tags and Text Searches

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This guide explains how to build searches using fields, tags and folders within the Sherlock Integrated Search platform. It also covers basic text searches but the reader is directed to the [Quick Guide to Keyword Search](#), for more information on text search options.

## Fields, Tags, Folders and Text

**Fields** refer to the metadata fields or unchanging information about a file (e.g. an email, document, image, spreadsheet). Examples include: From, To, Recipient, CC, Subject, SentDate, File Type, File Extension and so on.

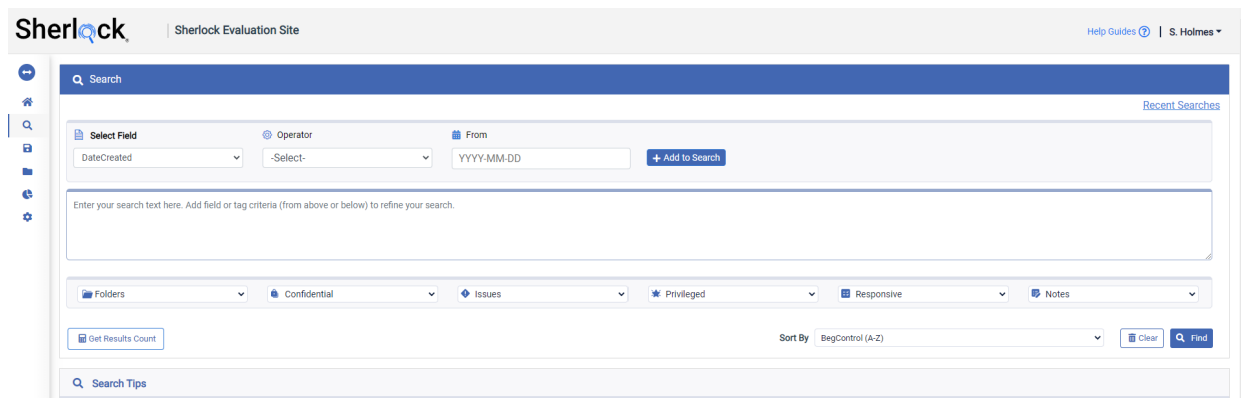
**Tags** reflect human judgments and can be changed by users. Examples include: Privileged, Confidential, Relevant, Not relevant, or a specific issue.

**Folders** hold a collection of files and are created by users.

**Text** includes the words or other information stored in the body of a file - often, in a text or body field.

You can search within almost any combination of Fields, Tags, Folders and Text with a single search statement. For example, find all documents in a certain date range (**field**) marked confidential (**tag**) with a certain phrase (**text**) that were placed in a certain folder (**folder**).

## Search Page



The screenshot shows the Sherlock Search interface. At the top, it says "Sherlock" and "Sherlock Evaluation Site". There is a search bar with "Search" text. Below the search bar, there are three main sections: "Select Field" with a dropdown menu showing "DateCreated", "Operator" with a dropdown menu showing "-Select-", and "From" with a text input field showing "YYYY-MM-DD". There is an "Add to Search" button. Below these sections is a large text input field with the placeholder text "Enter your search text here. Add field or tag criteria (from above or below) to refine your search." Below the text input field, there are several filter dropdown menus: "Folders", "Confidential", "Issues", "Privileged", "Responsive", and "Notes". At the bottom, there is a "Get Results Count" button, a "Sort By" dropdown menu showing "BegControl (A-Z)", a "Clear" button, and a "Find" button. There is also a "Search Tips" link at the bottom left.

## Text Searches

### Simple Text Searches

To create a simple text search

- Enter your search terms in the search box.
  - Enter words

- Enter phrases in “quotes” with appropriate connectors between the words or phrases.
- Separate terms by a comma for **OR** searches
- Add other operators such and **AND** or **AND NOT**

For example, a search for: Bush **AND** “Havana Club” will find documents containing the word Bush and the phrase “Havana Club.”

A search for: Bush **OR** “Havana Club” will find documents containing the word Bush or documents containing the phrase “Havana Club,” or documents with both.

To build extended text searches, use a combination of **AND**, **OR** and **AND NOT**. Use parentheses to group terms.

**Note** A full listing of text search operators can be found in the [Quick Guide to Keyword Search](#).

## DocText Searches

DocText syntax achieves the same results as a text search. It is often simpler to use it when you are creating longer searches using a combination of fields, tags and text.

For example, the following two searches will deliver the same results:

Bush AND “Havana Club”

DocText:[Bush AND “Havana Club”]

## AnyText Searches

AnyText searches across DocText and most or all Fields using a single search. The search statement AnyText:[“price fixing”] will look for the phrase “price fixing” in the body of the document and in the document fields (but not tags).

## Freeform Text Searches [square brackets]

A Freeform text search does not require formal search syntax. Sherlock ignores punctuation and connectors, treating each word as a separate term connected by an OR operator.

To create a Freeform Text Search, enclose text in [square brackets].

For example, you could copy and paste from a document request similar to this:

[Felon Disenfranchisement – All documents concerning the right of felons to vote in Florida, including but not limited to voter purges and reinstatement of voter rights.]

Sherlock will interpret the search in this way:

[Felon OR Disenfranchisement OR All OR documents OR concerning OR the OR right OR of OR felons OR to OR vote OR in OR Florida OR including OR but OR not OR limited OR to OR voter OR purges OR and OR reinstatement OR of OR voter OR rights]

**Note** We recommend that you remove the less-important terms, like and, or, the, of, etc. from the example above, directing Sherlock to focus on more important terms. E.g.:

[Felon Disenfranchisement right felons vote Florida voter purges reinstatement rights]

## Sorting Freeform Text Searches

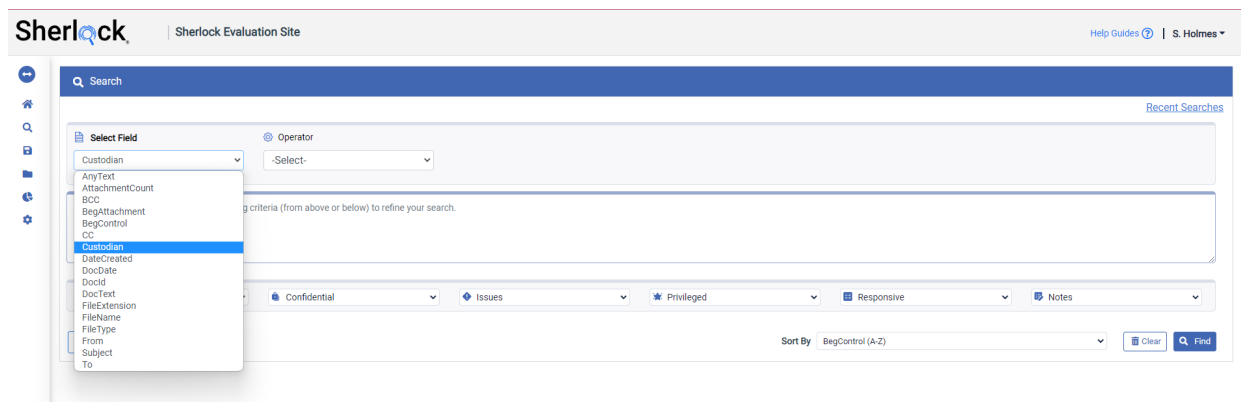
**Important** For Freeform searches you must sort the results by Relevance Z-A for the highest relevance score to be presented first.

## Field Searches

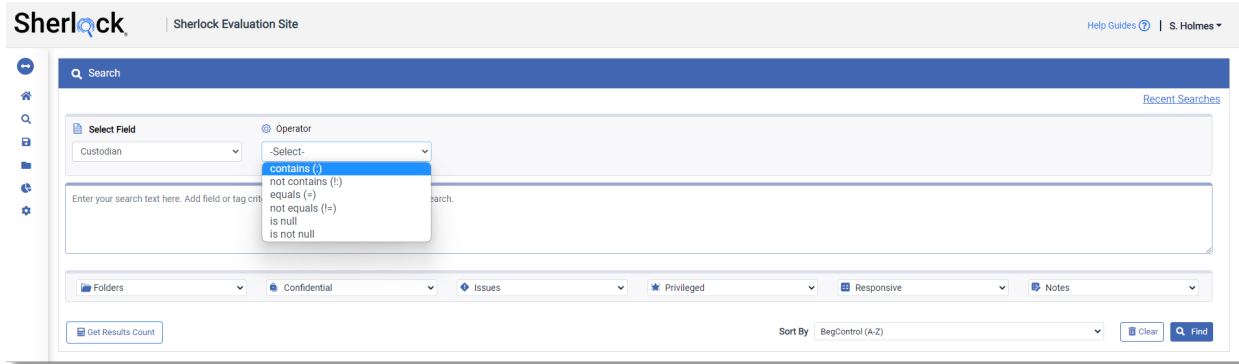
Field Searches identify the search terms in the fixed information from the doc, most often metadata fields such as To, From, Date, File Type, etc. The correct syntax to do so can be found in the [Quick Guide to Keyword Search](#) but you can also use Merlin's Field Search Wizard to help you build the field search.

Field searches require a multi-step process:

1. Select a **Field** to search.  
The fields available for search and viewing are determined by the site administrator for your user group.



2. Select an Operator  
Once you select the **Field**, you will be presented with a range of search operators specific to that **Field**.

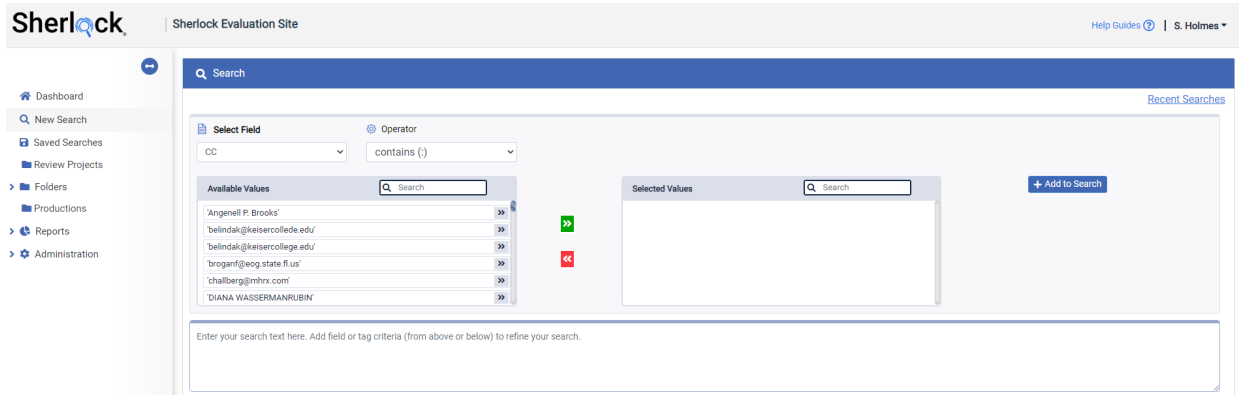


**Contains** means the word, name or phrase is included in the field's values. The search: Author:"jones" (contains) will match Jack Jones, Dave Jones or Sarah Jones because Jones is contained in all three.

**Equals** requires an exact field value match. The search Author="Dave Jones" will only match the name Dave Jones.

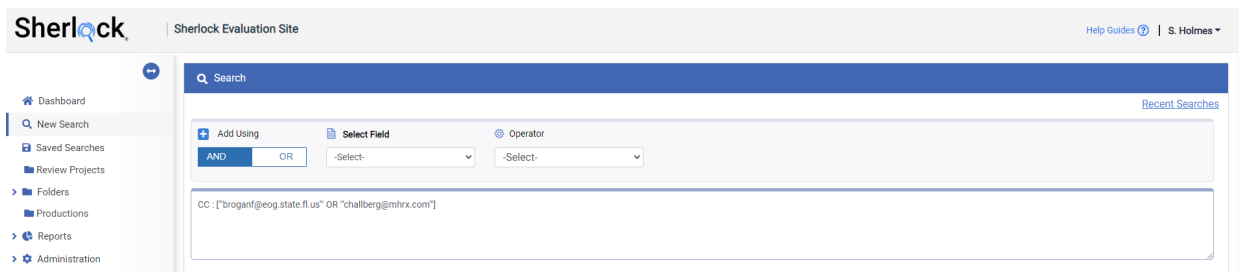
### 3. Select or Input a Value

In most cases, Sherlock provides a lookup box that contains all existing field values. Select or if necessary, input the desired value for your search.



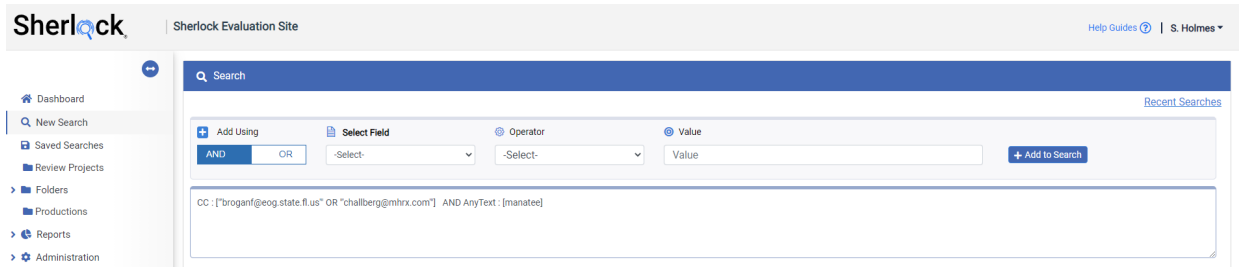
### 4. Click the **Add to Search** button.

You will see the search formatted in search syntax in the search window.



To add additional Field search criteria

1. Select AND or OR for the new part of the search.
2. Follow steps 1-4 above.
3. Or, modify the criteria directly in the search box.

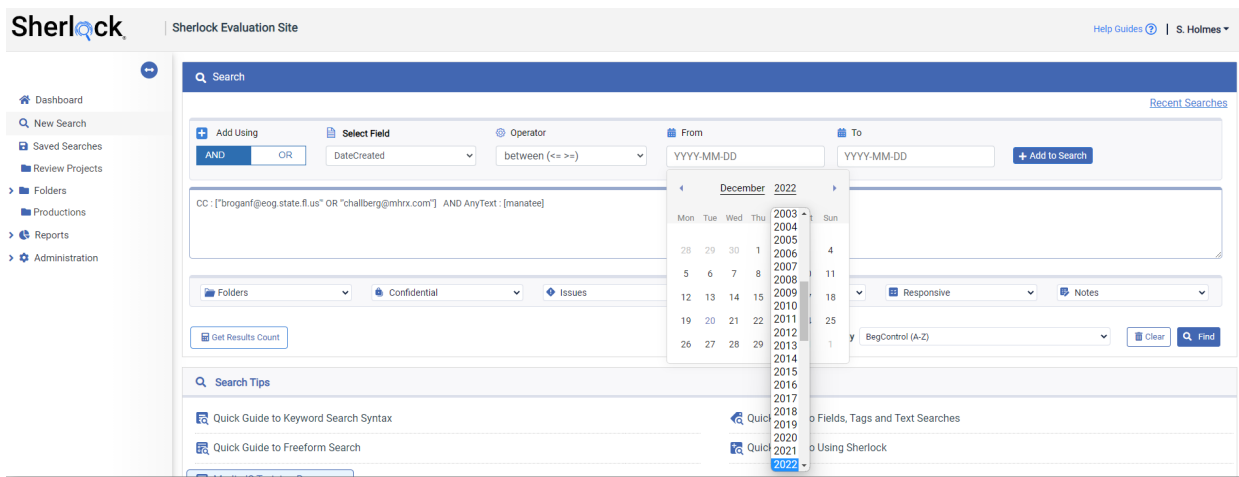


There is no practical limit to the number of field and text values that can be added to the search.

To begin a new search, click the **Clear** button.

## Date and Number Ranges

Date and number ranges narrow the search to a specific timeframe.



To search by date:

1. Select the date field from the **Select Field** dropdown.
2. Select a date **Operator**.
3. Select the dates from the calendar/s.
4. Click **Add to Search**.

You can enter these searches directly using the international date format. For example:

(DocDate >= 2012-09-13 AND DocDate <= 2021-05-22)

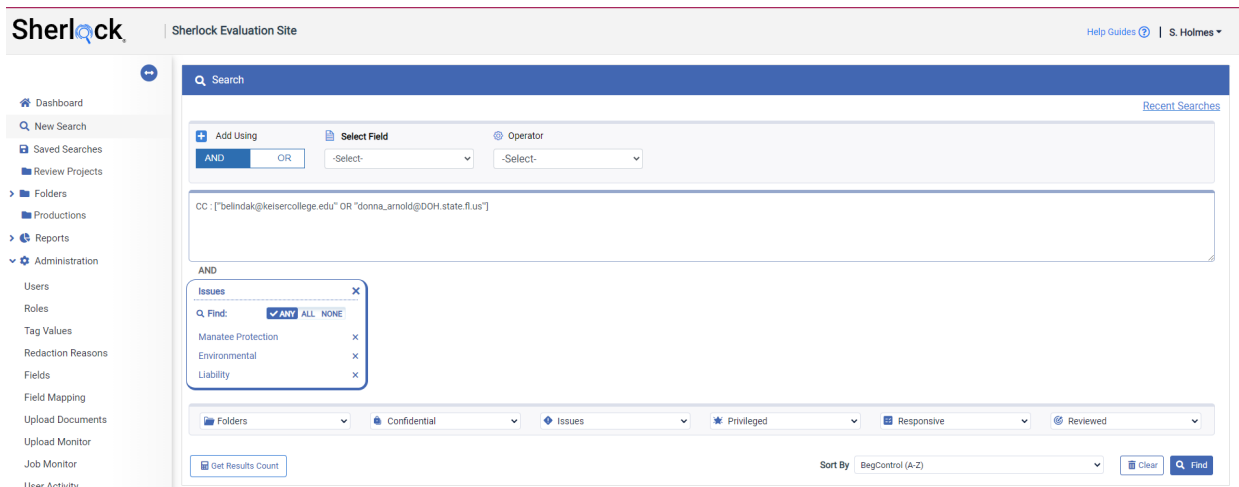
Use parentheses to make sure the range is treated as a range. The same approach works for numeric fields.

## Tag Searches

**Tags** reflect user judgments which can be changed at any time.

The **Tags** available to you for search and viewing are determined by the site administrator for your user group.

Tags are displayed in Tag groups with the selections for each group in a dropdown list.



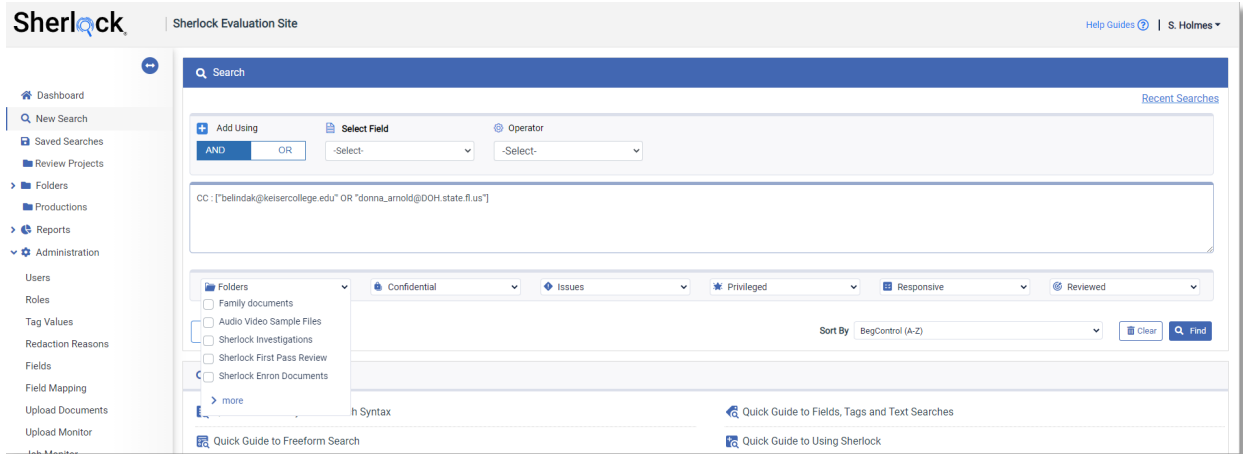
When a tag is added to a search, it is included with an AND operator between it and the previous criteria.

When multiple tag values are selected, they are still treated as AND searches with the other criteria, however ORs are placed between the Tags, meaning that any of those Tags can appear in each of the results documents.

## Folder Searches

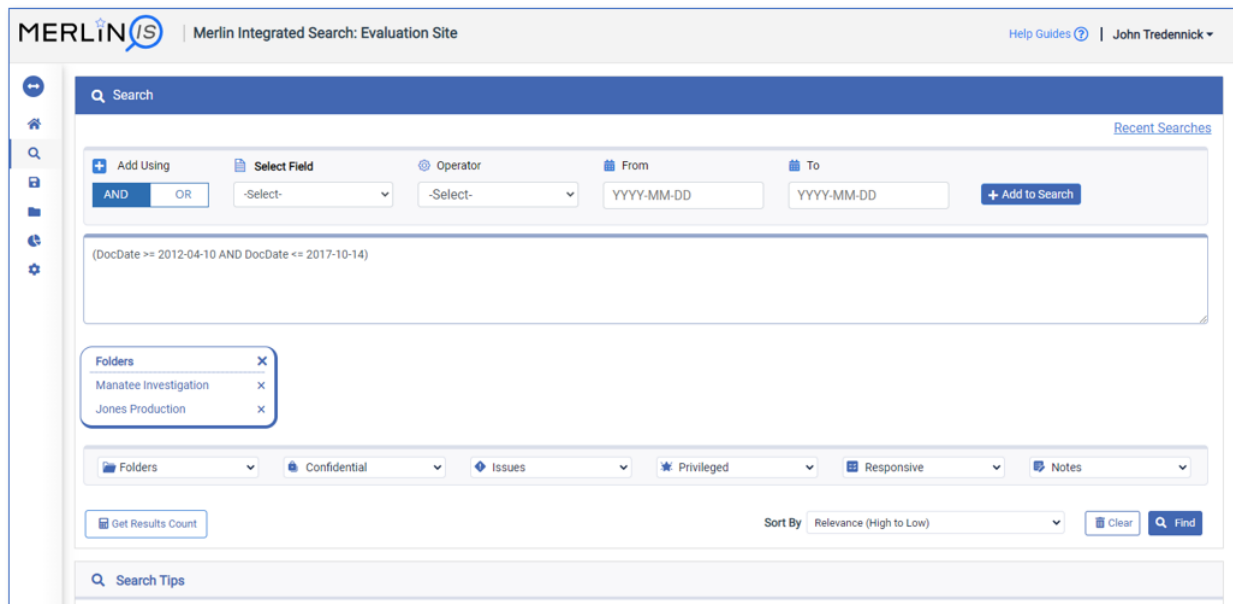
**Folders** hold a collection of files and are created by users.

The **Folders** available to you for search and viewing are determined by the site administrator for your user group



The folder dropdown list displays recently searched or visited folders. Click **more** to see all folders available to you for search. Folders can be private, public or shared. If a folder is not public or shared with you, you cannot view or search it.

Select one or more folders to add that folder criteria to your search.

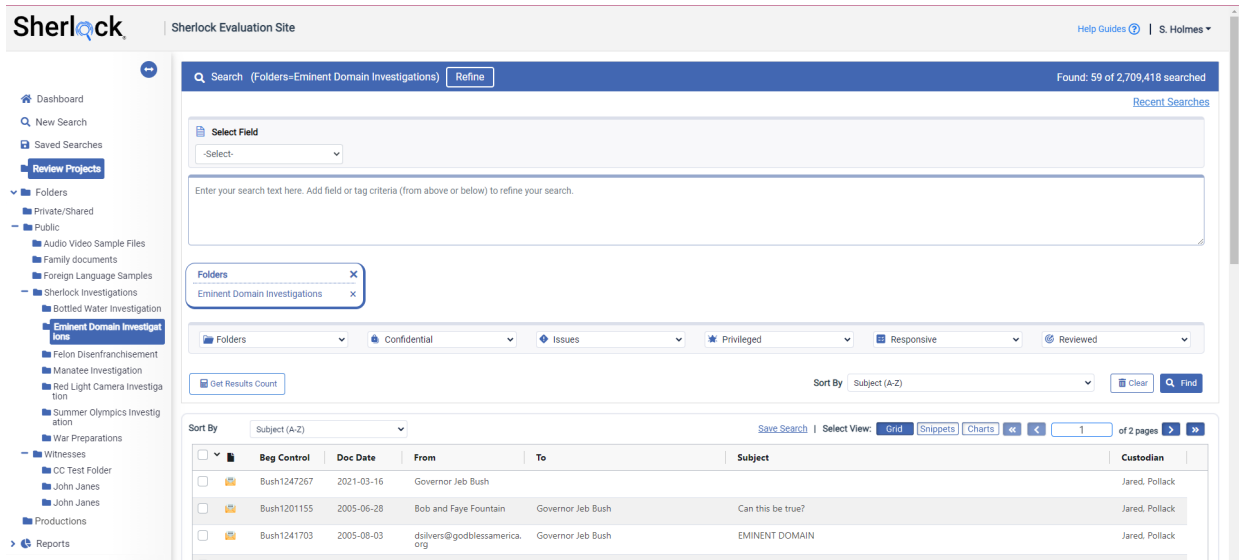


## Direct Folder Searches

You can search within a **Folder** from the File Explorer on the left of the site without first navigating to the Search screen.

1. Expand **Folders** as needed.
2. Select the **Folder** you want to search in.
3. Click **Refine** to add other search criteria.
4. Click **Find** to run the search.





## Get Results Count

To determine how many documents will likely return from your search without actually running the search, click **Get Results Count**. In some cases you will be asked to run the search to get an exact count.

## Sort By

The sort choices are determined by the fields displayed on the results page.

For numeric and alpha sorts, A-Z means lowest to highest. Z-A means the opposite. When sorting by "Relevance" the only option is to rank the documents from high to low.

To choose your desired sort value, select it in the **Sort By** dropdown list.

Search (Folders=Eminent Domain Investigations) Refine Found: 59 of 2,709,418 searched

Add Using Select Field Operator  
AND OR -Select- -Select-  
AnyText : [property] AND Custodian : [Jared, Pollack]

Folders  
Eminent Domain Investigations

Folders Confidential Issues Privileged Responsive Reviewed

Get Results Count

Sort By Subject (A-Z) Clear Find

Sort By	Subject (A-Z)	Beg Control	Doc Date	From	To	Subject
<input type="checkbox"/>		Bush1247267	2021-03-16	Governor Jeb Bush		
<input type="checkbox"/>		Bush1201155	2005-06-28	Bob and Faye Fountain	Governor Jeb Bush	Can this be true?
<input type="checkbox"/>		Bush1241703	2005-08-03	dsilvers@godblessamerica.org	Governor Jeb Bush	EMINENT DOMAIN Jared. Pollack

- Subject (A-Z)
- BegControl (A-Z)
- BegControl (Z-A)
- Custodian (A-Z)
- Custodian (Z-A)
- DocDate (A-Z)
- DocDate (Z-A)
- From (A-Z)
- From (Z-A)
- Relevance (High to Low)
- Subject (A-Z)
- Subject (Z-A)