



Quick Guide to Using Sherlock in AI Mode

Sherlock Integrated Search operates in two basic modes: Keyword search and AI mode. This is a guide on sending documents to using Sherlock in AI mode.

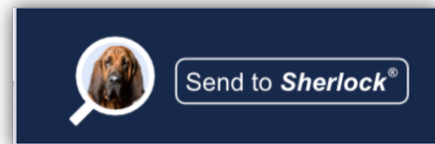
Sherlock AI integrates a series of machine learning algorithms that analyze documents you select and finds other relevant ones to further your investigation.

As you work through a Sherlock session, the signals you send about positive or negative documents train the algorithm. As the training progresses, Sherlock gets better and better at finding relevant documents. When Sherlock stops finding additional relevant documents, it is probably time to end that session.

Sending Documents to Sherlock

Single document

The easiest way to begin is to send a positive document to Sherlock. The Initial documents are most commonly found using keyword search:



1. Run a search.
2. View the results.
3. Identify a document that is relevant to your search.
4. On the document review page, click **Send to Sherlock**
5. On the pop-up window make selections.
 - a. Select either a **Folder** or the entire data set to search within.
 - b. **Name your session** if you want to identify it in the future.
 - c. Choose **Continue an existing Sherlock session** if you are refining a current AI search.
 - d. Choose **Copy positive document to a folder** if you want to folder the documents.
 - i. Select the **Folder** or create a **New Folder**.
6. Click **Submit**.

Name a Session allows you to return to the session at a later time and take advantage of earlier training examples. It also allows other users to contribute training documents and share in the session.

Copy positive documents to a folder directs Sherlock to store positive documents ("Thumbs Up") in a specific folder (existing or new). This will allow you to automatically save interesting documents for later review and analysis.

Send to Sherlock

Please select scope folder

Name your session (optional)

Continue an existing Sherlock session?

Copy positive documents to a folder

Choose a Folder *

- Sherlock Investigations
- Family documents
- Audio Video Sample Files

Other Folders

- Private/Shared
- + Public

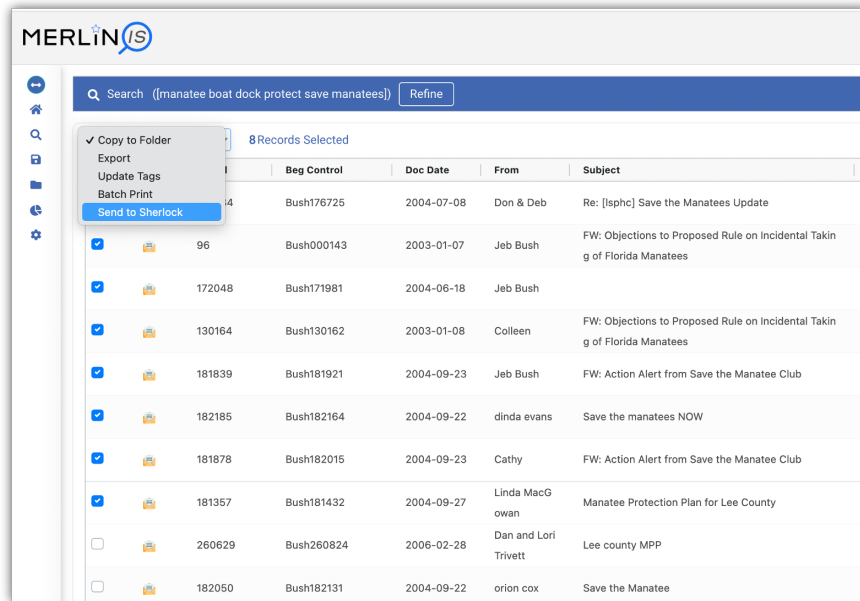
Cancel Submit

Multiple Documents

You can also send multiple documents to Sherlock either to start a new session or continue an existing one.

1. Select documents from a folder or select them from search results.

Here is an example:



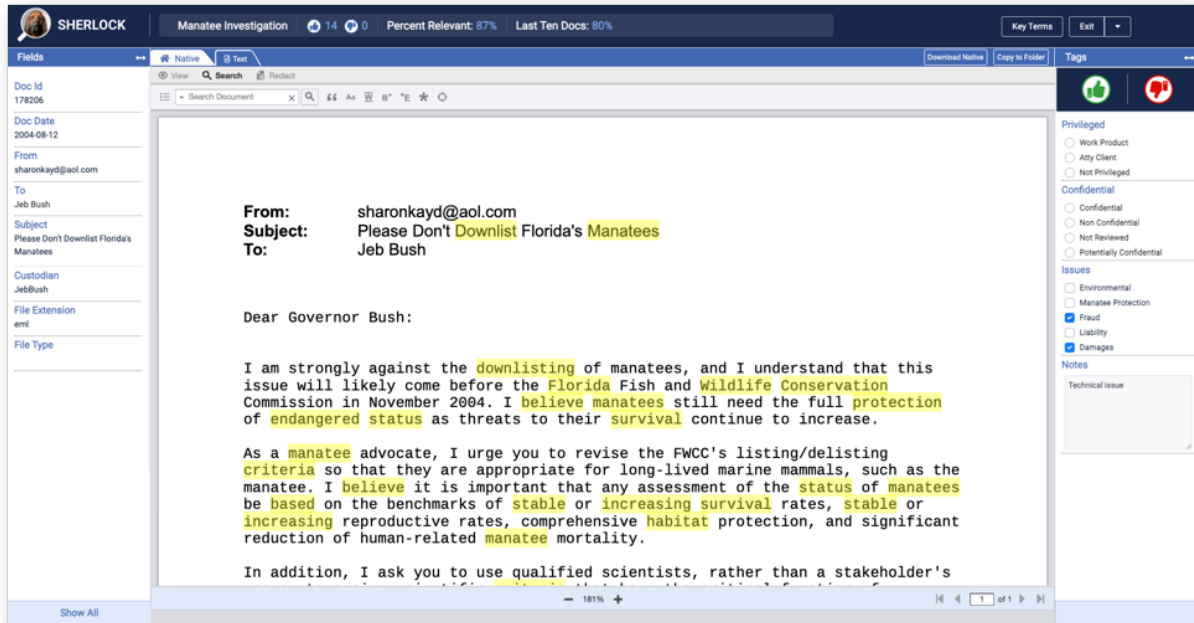
2. Click **Send** to Sherlock and all of the selected documents will be sent to Sherlock for training.

This method works from a folder as well as a search.

Note For best results, make sure all of the documents are on topic and appropriately included as positive training examples.

Results

Here is an example of a Results document:



Notice that information about your session is displayed at the top. You can see the session name along with a summary of documents submitted to Sherlock and the percentage of relevant documents Sherlock retrieves.

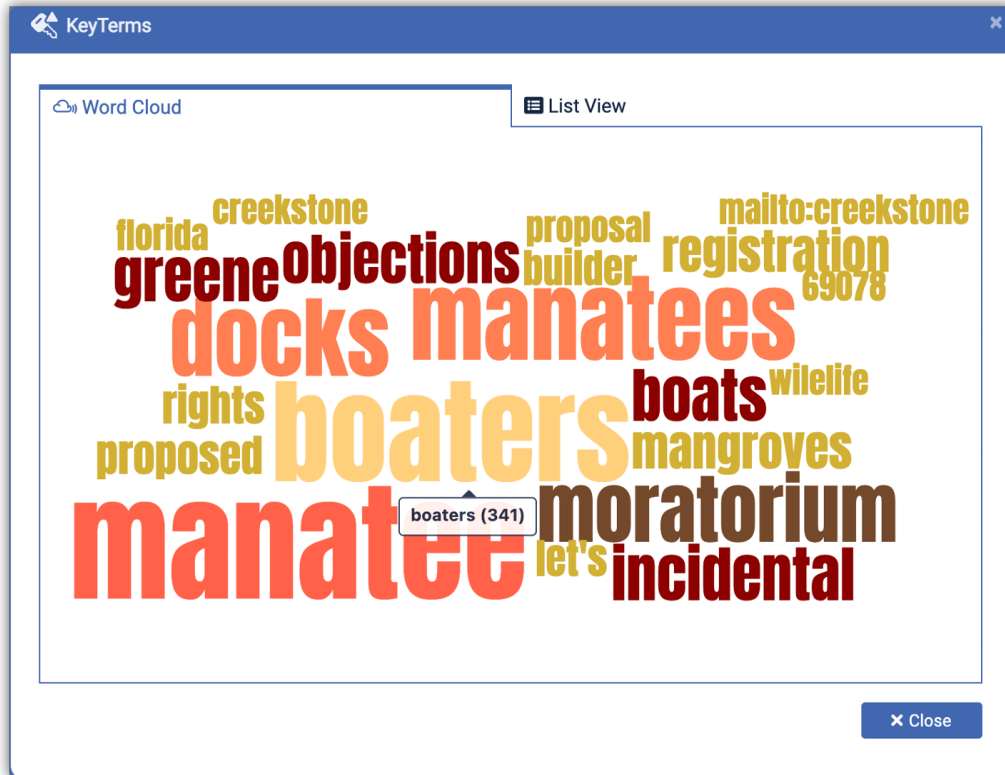
Review the document and give Sherlock a “thumbs up” for a positive document and a “thumbs down” for a negative one.

Key Terms Word Cloud

Sherlock sends the top **Key Terms** (approximately 30) with every document. On the top right of your screen, click **Key Terms** to see a list of the terms expressed as a word cloud.



The score or ranking of the terms is illustrated by the size of the text. The greater the size the higher the ranking.



Key Terms List View

You can also view **Key Terms** in a list format. The list is displayed in order of importance with the ranking provided alongside.

The screenshot shows the KeyTerms application window. At the top, there is a blue header with the 'KeyTerms' logo and a close button. Below the header, there are two tabs: 'Word Cloud' and 'List View', with 'List View' being the active tab. The main content area contains a table with the following data:

#	Term	Score	Boost
1	manatee	383	- 1 +
2	boaters	341	- 1 +
3	manatees	285	- 1 +
4	docks	264	- 1 +
5	moratorium	224	- 0 +
6	incidental	179	- 0 +
7	boats	176	- 0 +
8	greene	174	- 0 +
9	objections	164	- 0 +
10	mangroves	144	- 0 +
11	registration	141	- 0 +
12	proposed	129	- 0 +
13	rights	127	- 0 +
14	let's	122	- -1 +

Below the table, there are two sections for term management:

- + Boost Terms:** This section contains four buttons: 'manatee x', 'boaters x', 'manatees x', and 'docks x'.
- Suppress Terms:** This section contains three buttons: '69078 x', 'let's x', and 'builder x'.

At the bottom right of the window, there is a blue button labeled 'Close'.

To refine your search boost or suppress individual terms by clicking on the plus or minus buttons. The boost or suppressions can go from 1 to 3, positive or negative. These choices can be revised later.

Once you have made your decision, close the window and enter a judgment about the document.

Note Boosted and suppressed terms will be transmitted to Sherlock and taken into account when it looks for its next document to present.

Important : We recommend using the boost and suppress option sparingly, if at all. Sherlock is good at ranking documents and gets better as you train. Good terms will naturally rise and bad terms will fall in the rankings as you apply a Thumbs up or Thumbs down to more documents. Manual intervention may cause Sherlock to perform worse rather than better.

Finishing the Session

When you are ready to finish your session, click on the **Exit** button to be returned to the place where you started.

How do I know when to stop? Unfortunately, there is no magic formula to determine when to stop. Here are a couple of answers.

1. Stop when you have found what you are looking for, like in a Google search.
2. Stop when you no longer find relevant information. There is no rule of thumb we can give you but as the percentage of irrelevant documents grows, that could be a sign that Sherlock is not likely to find more relevant documents for this session.

