



Covered in this document

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Introduction to the Clarify Search Results Interface

The Clarify Search Results interface provides powerful tools to refine and tag your results. There are three ways you can view your results: in Summary view, Table view or Detail view. All views have identical results manipulation tools. The left side of the pane displays filters for refining search results. Tools to tag or edit criteria are displayed across the top. A key with explanations of each feature is on the next page.

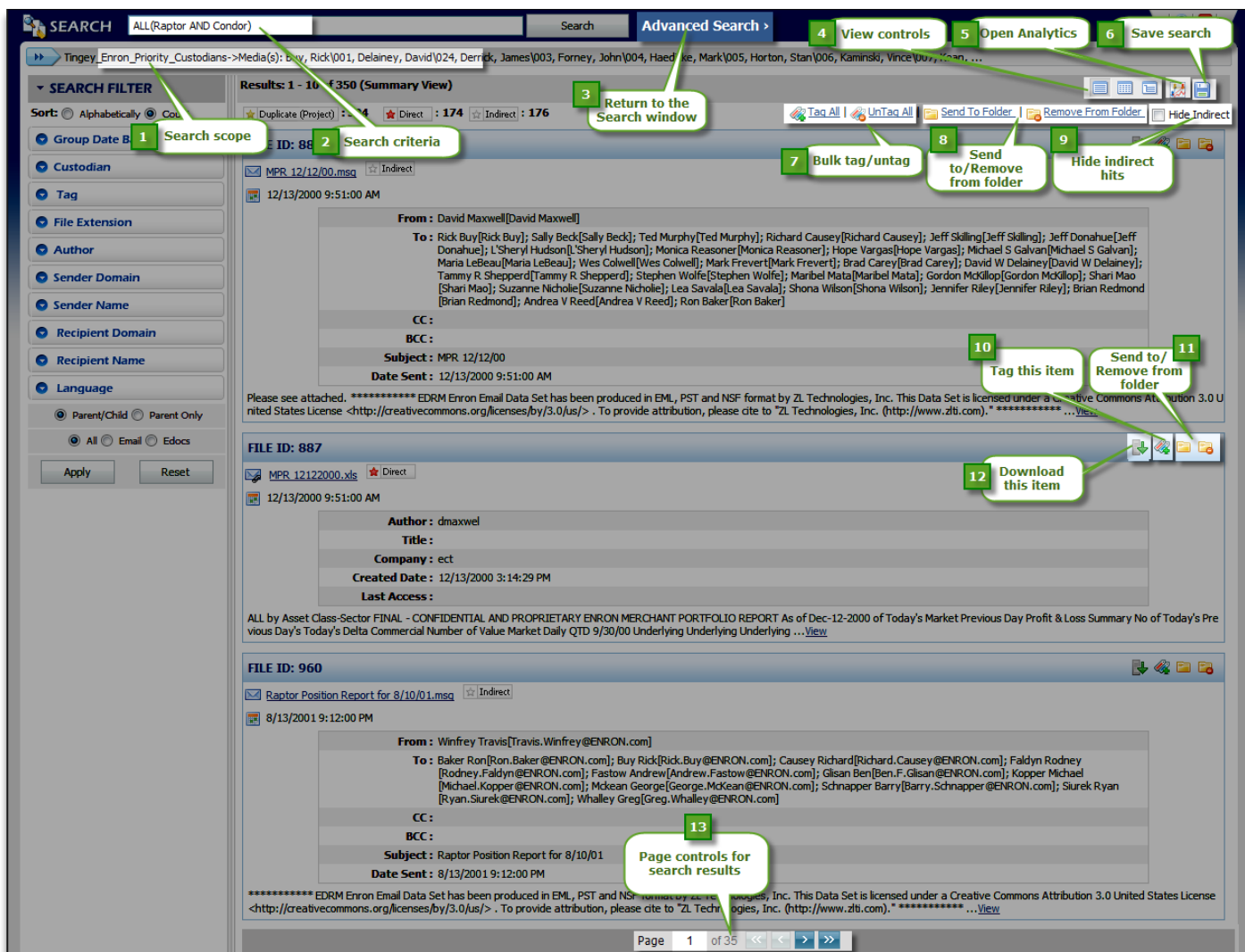
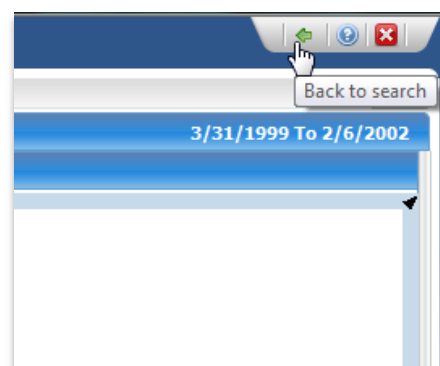


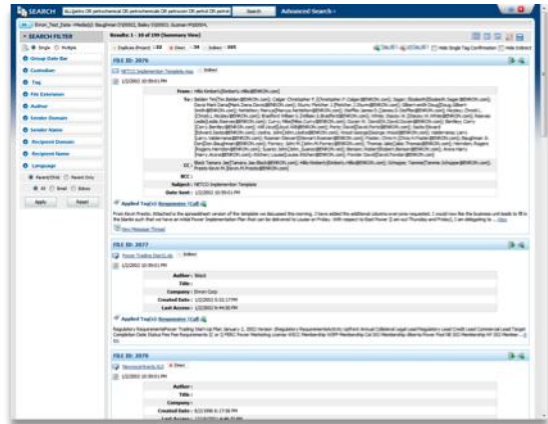
Diagram Key

1. Search scope: This field displays the media and custodians searched against. Note that scope is not editable on the results screen. To change the scope of your search, close this window to return to the project screen. Select the media and custodians desired on the project screen, then click the search icon.
2. Search criteria: Editable search criteria are displayed here. Type directly into this box to modify the query string, and then click the “Search” button to run the new search. Note that the new query will appear in your Search History pane.
3. Click “Advanced Search” to return to the first search window
4. View controls: Click the three, grid-like icons to switch between Summary, Table and Detail views.
5. Open Analytics: Click this icon to open email analytics for your search results. Any filters applied to the search results will be applied to the data displayed in email analytics. From Analytics, you can return to your search results by clicking the green arrow at the top right of the screen.
6. Save Search: Click the disk icon to save your search with a name.
7. Bulk-tag/untag:
 - a. “Tag All” will tag every result with the tag selected from the click-out menu.
 - b. “UnTag All” will remove the tag selected from the click-out menu.
8. Send To Folder | Remove From Folder: Click the desired link to send all items in the search results to an existing or to a folder you create.
9. Hide Indirect Hits: Check this box to display only the results that match the search criteria. Parent/children/attached items will be removed from the results display but will still be included if the results are exported to a CSV file.
10. Tag this item: Click the icon to tag items individually.
11. Send to or remove from folder: Click the plain icon to send an individual item to an existing folder or to a folder you create. Click the icon with a red dot to remove an individual item from a folder.
12. Download this item: Click this icon to download the native file for the selected item.
13. Page controls allow you to browse your results one page at a time.





Summary view displays a list of results in the right pane. For each item, basic metadata and the first two lines from the item's full text are displayed.



Summary View

Table view displays a list of results in the top-right pane and full text of the selected result in the lower right pane, much like an email client. Note that in Table view, you can export your list of results in CSV format. The export will contain metadata for each item, but does not include the item's full text.

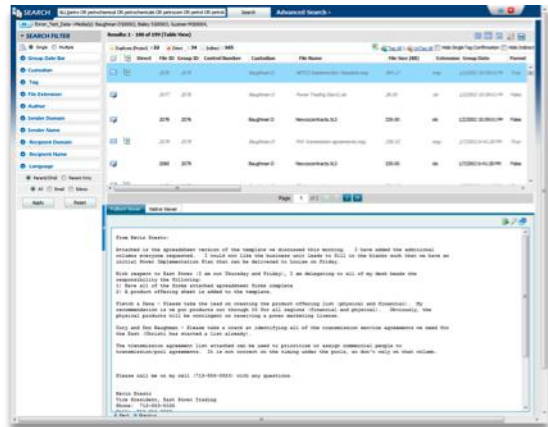
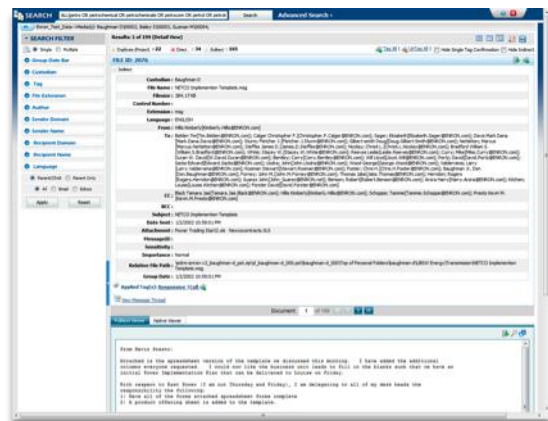


Table View

Detail view displays one result with metadata and full text/native viewer in the right pane.



Detail View

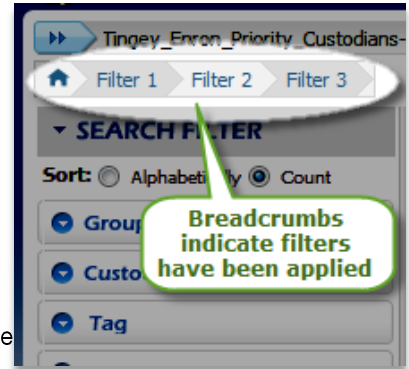


Search Filters

Use filters to refine your results or to identify specific items in the results set. Click on the desired tab in the filter pane, choose your options, and then click the “Apply” button at the bottom of the pane. A breadcrumb trail starting with “Filter 1” will appear above the filters pane to indicate how many filters have been applied to the results set.

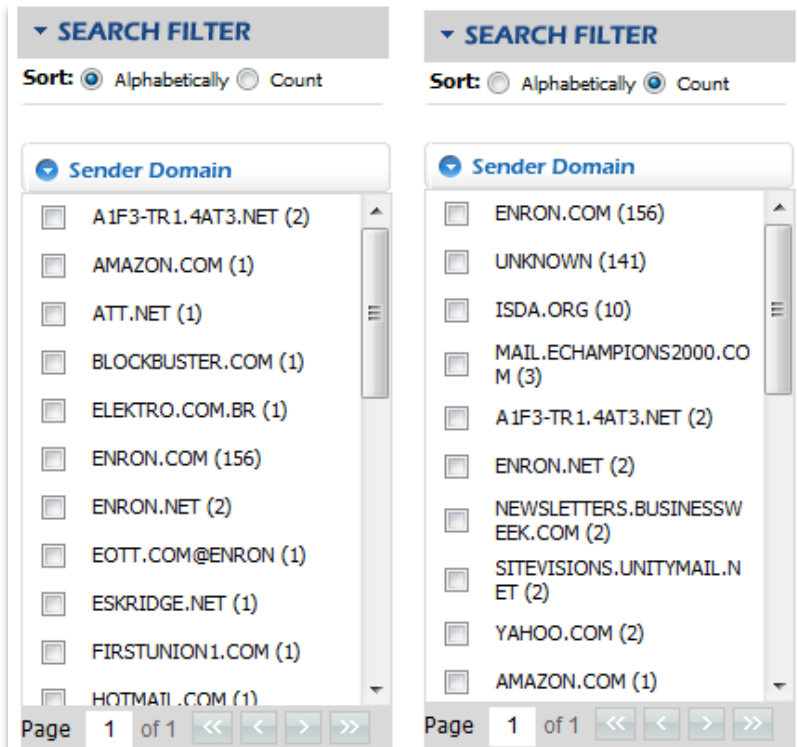
Filters are additive in their application to your search results. For example, you could first set a Group Date range and apply it to show only results within a specified date range. Next, you could select a particular Sender Name as a filter and apply it to show only results that match the date range and the sender name.

To clear all filters, click on the house icon at the beginning of the breadcrumbs or the “Reset” button at the bottom of the Search Filter pane. The system will again display the complete, unfiltered search results. To clear filters one at a time, click on their breadcrumb to remove them.



Sort a Filter’s Options

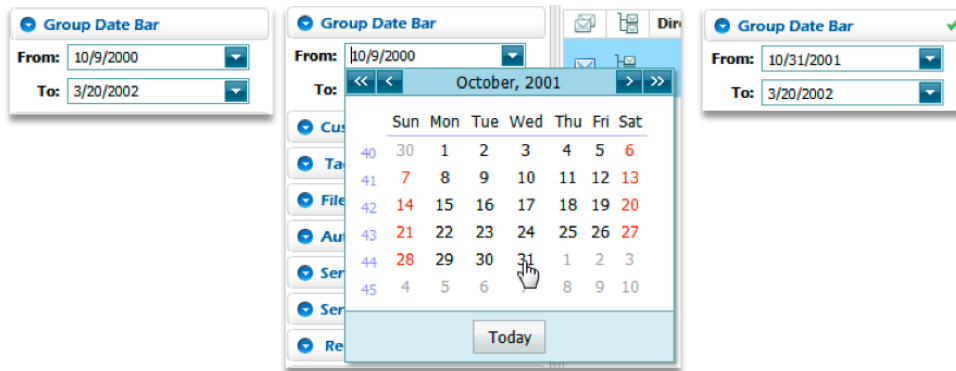
Some filters can have a large number of options available, based on the results set. The options can be sorted either alphabetically, or by document count. The latter will display options with the largest matching document counts higher in the list. Note the effect of switching from Alphabetically to by Count on the Sender Domain filter in the image below.





Filter by Group Date Bar

“Group Date” refers to the date applied to items that have a parent/child relationship, such as an email and its attachment. The Group Date Bar filter allows you to set a start date and an end date to display only results whose group date falls within a specific time frame. The first time you open the Group Date Bar, the fields will be automatically populated with the first and last Group Dates that occur within your search results. Select a “From” date and a “To” date, and then click “Apply” to filter your results. The “From” date must occur earlier in time than the “To” date, or your filter will show that no results matched.



Filter by Custodian

To filter by Custodian, click on the plus sign next to a custodian name. Click on the check box to select the media assigned to the custodian. A custodian may have multiple media sources. Click “Apply” to narrow the search results to display only the selected custodians.

Filter by Tag

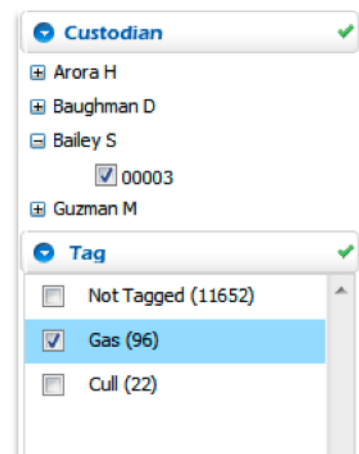
To filter by Tag, click on the check box next to the desired tag(s), and then click “Apply.” Only tags used within the data set will be available as filters.

Filter by File Extension

To filter by File Extension, click on the check box next to the desired extension(s), and then click “Apply.” Only extensions used within the data set will be available as filters. Note that specifying a file extension will not necessarily determine the file type, as users can change a file extension at will within their operating system.

Filter by Author

To filter by Author, click on the check box next to the desired author(s), and then click “Apply.” Only authors within the data set will be available as filters.



These filter selections, when applied, will narrow the search results to show only those tagged “Gas” and whose custodian is “Bailey S.”



Filter by Sender Domain

To filter by Sender Domain, click on the check box next to the desired domain(s), and then click “Apply.” Only domains that occur within the data set will be available as filters.

Filter by Sender Name

To filter by Sender Name, click on the check box next to the desired name(s), and then click “Apply.” Only sender names that occur within the data set will be available as filters.

Recipient Domain

To filter by Recipient Domain, click on the check box next to the desired domain(s), and then click “Apply.” Only recipient domains that occur within the data set will be available as filters.

Recipient Name

To filter by Recipient Name, click on the check box next to the desired name(s), and then click “Apply.” Only recipient names that occur within the data set will be available as filters.

These filter selections, when applied, will narrow the search results to show only those tagged “Gas” and whose custodian is “Bailey S.” **Fios 6** | Fios Clarify: *Search Results* www.fiosinc.com **Fios Clarify: Search Results**

Language

To filter by Language, click on the check box next to the desired language(s), and then click “Apply.” Only languages that occur within the data set will be available as filters.

Filter by Parent/Child or Parent Only

At the bottom of the Search Filter pane, a set of radio buttons allows you to show only parent objects. A parent item is an item that contains another item.

Examples

Parent item: An email message

Child item: An attachment to the email message

Parent item: A PowerPoint presentation file

Child item: A spreadsheet chart pasted into the presentation

 A screenshot of a search filter interface. It features two rows of radio buttons. The first row has "Parent/Child" (unselected) and "Parent Only" (selected). The second row has "All" (selected), "Email" (unselected), and "Edocs" (unselected). Below the radio buttons are two buttons: "Apply" and "Reset".

By default, this option is set to show Parent/Child to provide the broadest results set. Click the radio button next to “Parent Only” to filter the results to display only parent items, and then click “Apply.”

Filter by Email or Edocs

A second set of radio buttons allows you to choose whether to display everything in the results set, email results only or Edocs results only. Click the radio button next to the option desired and click “Apply.”



Close/Open Filter Pane

To close the Search Filter pane, click on the blue bar with a left-pointing triangle dividing the filters pane from the results pane (you may have to scroll down to find it). To re-open the filter pane, click on the blue bar again.