



User Guide

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1 User guide overview

When working with Relativity as a reviewer, it's important to familiarize yourself with the software's many features.

This guide outlines Relativity's capabilities and walks you through how you can best use Relativity for document review, from logging in to creating a word index inside a workspace.

1.1 Navigation

Relativity is a complex application with many screens and functions. This section describes the main core reviewer interface you use to review documents as well as some of the standard procedures you'll need to perform as you use the product.

1.1.1 Logging in

Relativity offers several ways to log in and it's possible to have two or more methods available to you. Your system admin will provide you with all the information you need to log on. Contact your system admin if you have additional questions.

For procedures to log in, see [Logging in to Relativity](#).

1.1.2 Tab navigation

When you log in to Relativity, you see a tab strip at the top of the page. This tab strip displays the currently available tabs whether you are in Home or Workspaces mode. The active tab is indicated by a bright blue background, while inactive tabs have a navy background.

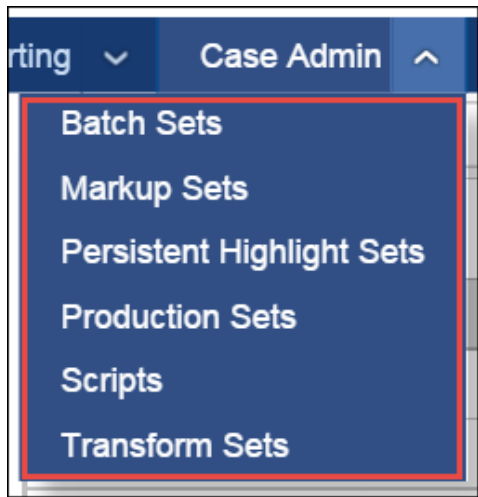
Tabs appear from left to right in the order identified by the Order setting for each tab.

1.1.2.1 Parent and child tab display

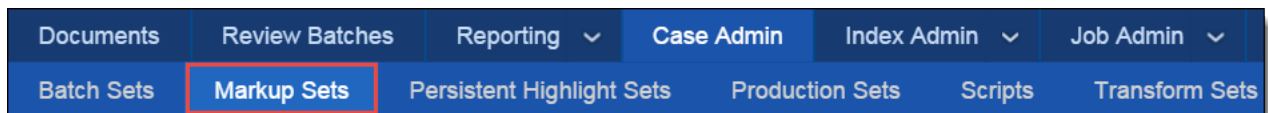
Parent tabs are indicated by a drop-down arrow to the right of the tab name.



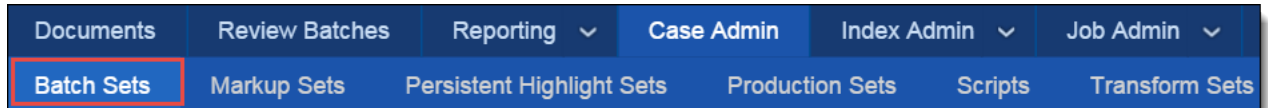
Click the drop-down arrow to display a vertical list of the child tabs owned by that parent tab.



When you select a child tab (for example, Markup Sets) from the list, you're taken to that page, and all child tabs appear horizontally under the active parent tab.



Instead of clicking the drop-down arrow, you can also click the parent tab itself. Clicking the parent tab takes you to the default child tab, which is identified by the Order setting for each child tab. All child tabs then appear horizontally under the active parent tab.

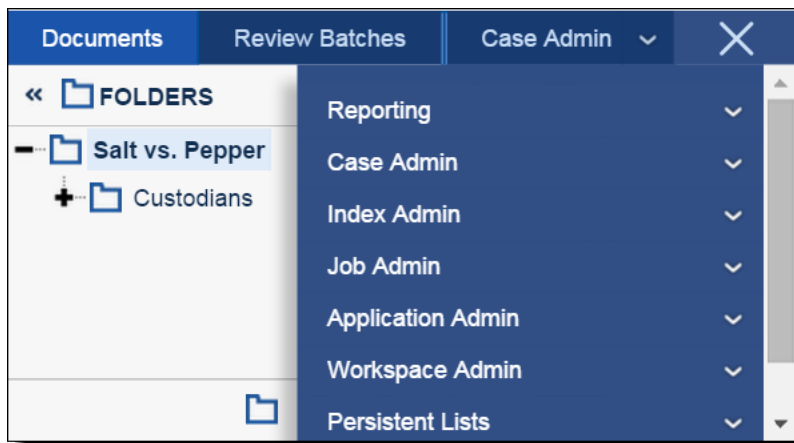


1.1.2.2 Overflow tab menu

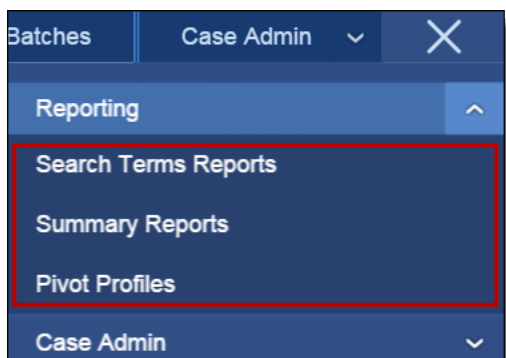
The number of tabs that appear in the tab strip depends on the size of the browser window. If the window is wide enough, the full set of tabs appears. As you reduce the size of the window, or if you have a large number of tabs in your workspace, an overflow drop-down icon appears at the right edge of the tab strip to house the remaining tabs.



Click this overflow icon to display a drop-down of the remaining tabs. If the number of tabs exceeds the height of the drop-down, a vertical scroll bar appears, allowing you to view the full set of tabs.



Parent tabs in the overflow menu are indicated by a drop-down arrow to the right of the tab name. Click the drop-down to display the child tabs for that parent.



You can select a child tab to navigate directly to that tab, or you can select the parent tab name to navigate to the default child tab. The default child tab is identified by the tab order setting on each tab.

While working with the overflow tabs menu, a set of double vertical lines appears on the left edge of the right-most tab. This indicates that you selected the tab from the overflow menu. If you select a different tab from the overflow menu, the tab you select replaces the previous tab.



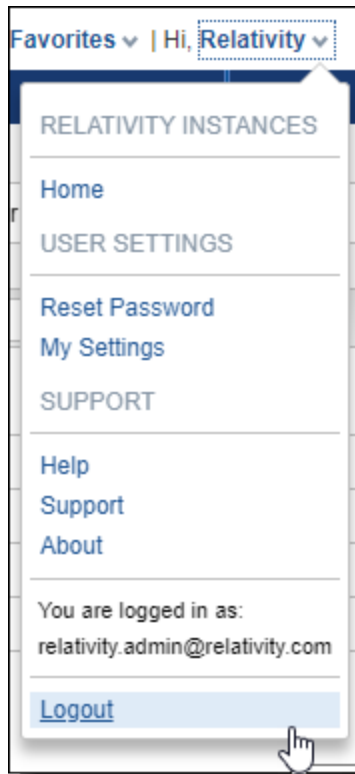
When you click the icon to display the overflow tab menu, the icon changes to an X. Click this icon to collapse the overflow tab menu.



1.1.3 User options

When you first log in to Relativity, you see the default Home tab. Relativity displays the Workspaces tab as your default Home tab when you navigate to Home, but you can change the default Home tab to be any tab you want. See [Navigation on page 7](#) for more information.

You can click your name in the upper-right corner to see the user drop-down menu.



The Relativity Instances section includes federated instances you have access to. Federated instances links allow reviewers to easily switch to other Relativity environments.

1.1.3.1 Changing the default Home tab

Relativity displays the Workspaces tab as your default Home tab when you navigate to Home, but you can change the default Home tab to be any tab that is available for default and that is not a specific tab within a workspace.

Perform the following steps to change the default Home tab:

1. From **Home**, click the **Admin Workspace Configuration** tab.
2. Click the **Tabs** tab.
3. Click the tab you want to set as the default Home tab.
4. Click **Edit**.
5. Select **Yes** in the **Is Default** drop-down menu.
6. Click **Save**.

Note: If a user is not a member of a group with permission to view the tab set as the default Home tab, Relativity redirects to the lowest ordered tab the user's permissions allow.

1.1.3.2 My settings

Clicking **My Settings** from within the user drop-down menu opens a settings mode pop-up, which displays your user information. Click **Edit** to change your settings.

- **First name** - your first name.
- **Last name** - your last name.

Note: Your first and last name appear as your username throughout Relativity.

- **Email address** - your email address and login.
- **Skip Default Preference** - When reviewing documents, skip prevents a reviewer seeing documents that are already coded (depending on the selected view). See Document skip in the Admin guide. Choose one of the following options:
 - **Normal** - this setting disables the skip feature.
 - **Skip** - this setting turns on the skip feature.
- **Default Filter Visibility** - determines whether or not the filters for columns in views display by default.
 - **Hidden** - hides filters by default.
 - **Visible** - displays filters by default.
- **Item list page length** - a numeric field indicating the default list length for all lists in Relativity. It can be set from 1 to 200.
- **Default Selected File Type** - the default viewer mode (Viewer, Native, Image, Long Text, or Production) used when first loading the Viewer. If the mode selected is not available, the Viewer will instead use the first available option. See [Viewer on page 81](#) for details.
- **Default Saved Search Owner** - determines whether saved searches are public or private by default. If set to Public, the search is public and all users with rights to it can see it. If set to Logged in User, the search is private and only the logged in user is able to see it.

Note: Depending on your permissions, you may not have rights to edit the **Default Saved Search Owner** field.

- **Native Viewer Cache Ahead** - if checked, this field pre-loads the next native document in your review queue when the active document is loaded.

After changing your settings as needed, click **Save**.

1.1.4 UI framework

In the UI framework, you can access dashboards and the search panel.

1.1.4.1 Dashboards

When you've created a page configuration you'd like to preserve, you can create a customized dashboard. You can save multiple dashboards to quickly change the page configuration. The item list and any widgets on the dashboard will update automatically in response to filtering or searching. Dashboards only report on data within the workspace you are in.

The screenshot displays a dashboard with several widgets. At the top left, there's a 'Documents' folder browser showing '+ No Related Items'. The main area is divided into three panels:

- Cluster :: Case Documents:** A 'Document Breakdown' pie chart shows 62,075 items 'In Cluster Set' (blue) and 33,252 'Not in Cluster Set' (orange). Below it is a bubble chart where bubble size represents relevance. A legend indicates relevance levels: 81-100% (darkest blue), 61-80% (medium blue), 41-60% (light blue), 21-40% (very light blue), 1-20% (lightest blue), and 0% (white). A 'Depth' slider is set to 4.
- Count of Custodian:** A horizontal bar chart showing counts for Zipper Andrew (~32,000), Allen, Paul (~10,000), Mann, Kay (~7,000), Bass, Eric (~4,000), and Campbell, Larry (~2,000).
- Count of STR - BB STR BB:** A pie chart showing percentages: tele* (178) at 34.3%, Enron and data (160) at 30.8%, ENA (57) at 11.0%, Strategic (54) at 10.4%, enron w/5 data (36) at 6.9%, Washington and bureau (20) at 6.9%, employ* w/5 tele* (9) at 6.9%, and washington w/10 bureau (5) at 6.9%.





At the bottom, a 'List' view shows a table with columns for '#', 'Compare', 'Control Number', 'Custodian', and 'Relevance Rank'. The table contains three rows of document entries.

#	Compare	Control Number	Custodian	Relevance Rank
1	Edit	Word Doc - Track Changes - Final Showing Markup.docx	(All)	= Filter
2	Edit	transcript3		
3	Edit	transcript2		

The page initially appears with the folder browser on the top left, the search panel on the bottom left and the item list to the right. Within this new framework, you have multiple options for customizing your display.

You can resize, move, or collapse any panel on the page, including any widgets you create.

- To resize any panel, hover over the line separating the item list from the panel until you see the mouse pointer change to horizontal arrows, then click and drag.

- To move, hover over the top of the panel until you see the  icon. Then, click and drag the panel to the new location.
- To collapse the search panel or browser pane, click the  icon. Once collapsed, click the  icon to restore the browser pane or the  icon to restore the search panel.

Additionally, you can drag and drop panels to rearrange on the page. Click any panel and drag it to a new location. The other panels will automatically move to accommodate the panel you're dropping.

Note: You must have the correct workspace permissions to add, edit, or save a dashboard and to save pivot widgets to your dashboard. You can also export individual Pivot widgets to Excel or to PNG format from each widget's context menu. See Exporting a Pivot widget in the Admin Guide for more information.

Note: To enable the Add Widgets button and Pivot functionality for an Relativity Dynamic Object (RDO), you must select Enabled for the **Pivot** property in the Object Type Information section for the object.

Workspace security permissions

To configure permissions for dashboards:

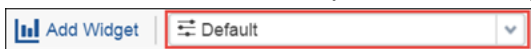
1. Navigate to the **Relativity Utilities** console on the **Workspace Details** tab.
2. Click **Manage Workspace Permissions**.
3. Click **Edit Permissions** for a group on the **Group Management** tab.
4. Grant access to the workspace security permissions listed in the table.

Object security	Tab visibility	Other settings
<ul style="list-style-type: none"> ■ Dashboard - View, Add, Edit 	<ul style="list-style-type: none"> ■ Documents 	<ul style="list-style-type: none"> ■ Export Dashboard ■ (Optional) Folders Browser

Creating a dashboard

To create a dashboard:

1. Click the **Dashboards** drop-down in the top right corner of the screen.



Note: You can only access the drop-down if Pivot is Enabled for the given object type.

2. Click **New Dashboard** to save the current page configuration as a new dashboard.
3. Enter a name and an order number for the dashboard.

Note: The dashboard with the lowest order number will appear by default when you log in to Relativity.

Adding widgets to a dashboard

You can add the following widgets to customize your dashboard:

- **Pivot charts and tables** - You can use Pivot to summarize data in tables or charts to visually analyze trends in your data.
- **Cluster visualizations** - On the Documents tab, you can use Relativity Cluster Visualization to render your cluster data as an interactive visual map by adding a Cluster Visualization widget. This offers you a quick overview of your document cluster sets and quickly drill into each cluster set to view subclusters and conceptually-related clusters of documents. Please note that there may be only one cluster visualization widget per dashboard.

Note: When you reach the maximum number of widgets allowed on a dashboard, the **Add Widget** button will be grayed out and a tooltip displays when you hover over it that lets you know the reason you cannot add any additional widgets to your dashboard. This is controlled by the **MaxNumberDashboardWidgets** instance setting.


Saving changes to a dashboard

You can also make changes on the fly and save a dashboard with the changes. If a dashboard has not been saved, an orange notification displays in the Dashboard drop-down until it is saved.

1. Click the Dashboards drop-down in the top right corner of the screen to display the list of dashboards available on the current tab.
2. Click **Save** to save the changes to the existing dashboard. Click **Save As** to save the page configuration as a new dashboard, and then enter a **Name** and **Order** number.

Note: If a dashboard is part of a locked application, the option to save the dashboard is unavailable.

Deleting a dashboard


To delete a dashboard from the current tab you are in, click the  icon to the right of the dashboard you want to delete in the Dashboards drop-down.

Click **Delete** in the Delete Dashboard Confirmation popup to delete the dashboard.

Note: If a dashboard is part of a locked application, the option to delete the dashboard is unavailable.

Renaming a dashboard

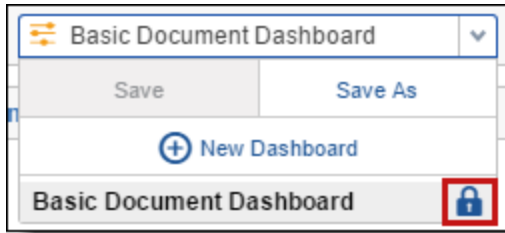
To rename a dashboard:


1. Click on the  icon next to the name of the dashboard in the Dashboard drop-down.
2. Enter a **Name** and an **Order** number for the dashboard. The order number controls the order in which the dashboard displays in the list.
3. Click **Save** to save your changes.

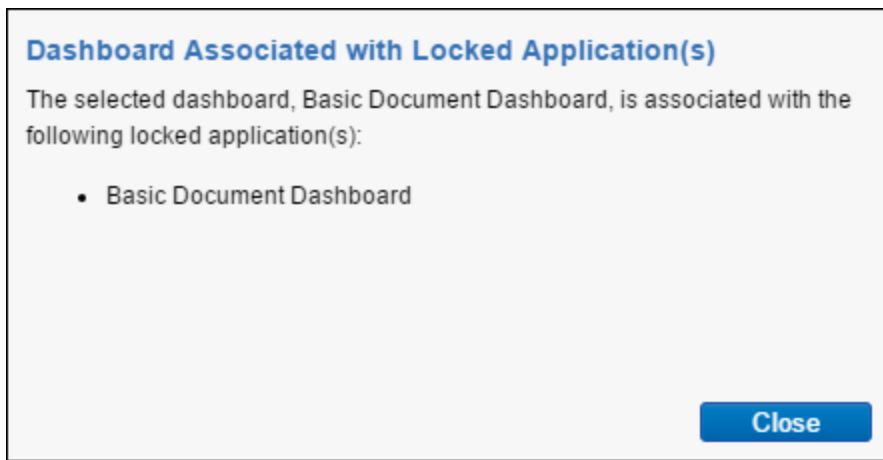
Note: If a dashboard is part of a locked application, the option to edit the dashboard is unavailable.

Dashboards and locked applications

If a dashboard is part of a locked application, a  icon appears to the right of the dashboard.



Click the  icon to view a list of locked applications the dashboard is associated with.



1.1.4.2 Using the search panel

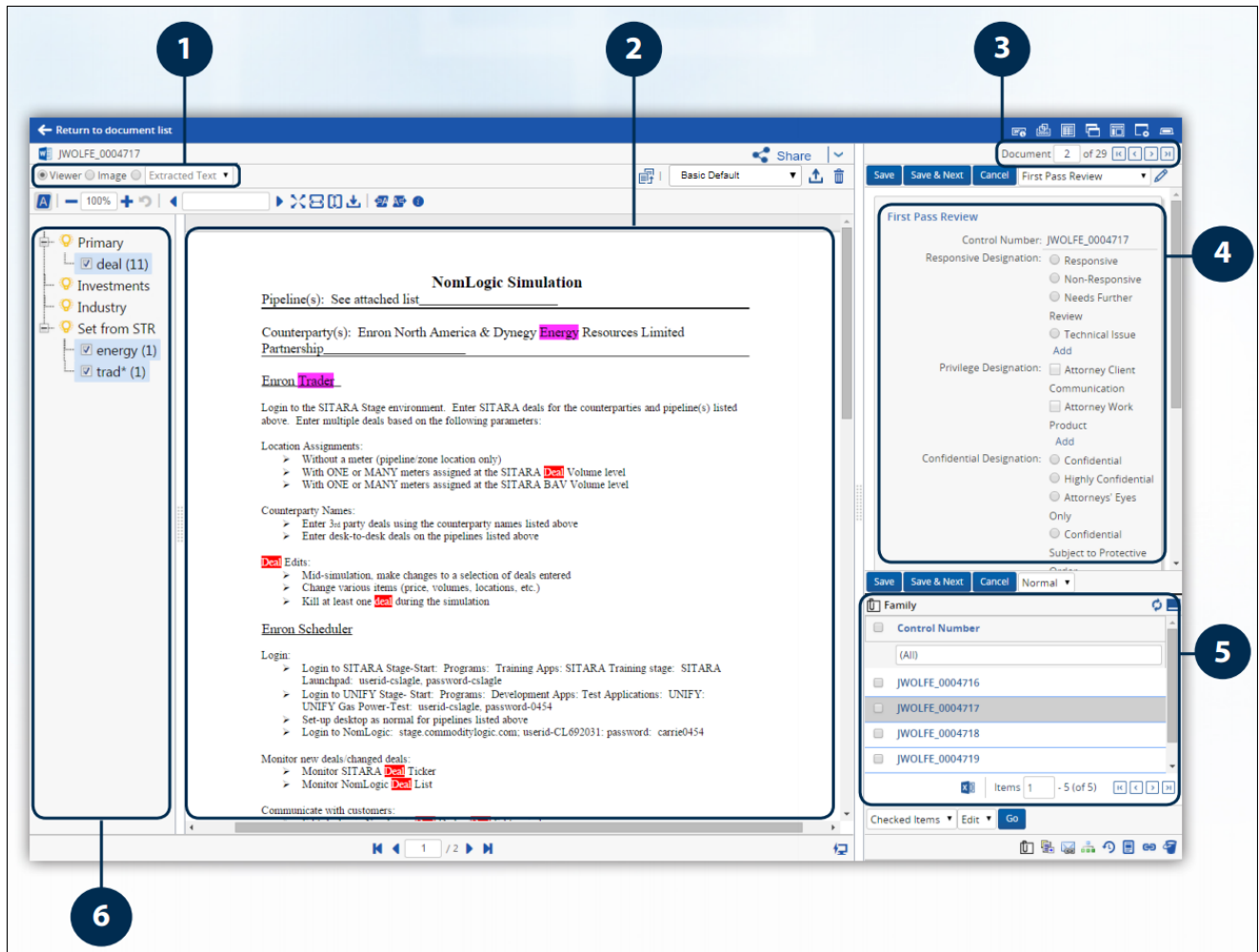
While working in the Document list in the new UI framework, you can use the search panel to filter your data.

1.1.5 Core reviewer interface

To open a document in the core reviewer interface, click on a document name or identifier on the Documents tab.

The core reviewer interface screen consists of the following areas:

1. Document view selector
2. Viewer
3. Navigation bar
4. Layouts
5. Related Items pane
6. Persistent Highlight Sets



You can toggle between several viewing options by using the icons in the upper-right corner of the window.



- **Keyboard shortcuts legend** - displays the keyboard shortcuts legend for the workspace.
- **Enable/disable keyboard shortcuts** - enables and disables keyboard shortcuts for the workspace.
- **Show/hide document list** - show or hide the document list from the Core Reviewer Interface.
- **Dock/undock document viewer** - docks or undocks the viewer from the Core Reviewer Interface.
- **Swap panes** - flips the Viewer from the left side of the window to the right or vice-versa.
- **Launch standalone document viewer** - pops out a static standalone version of the Viewer.
- **Show/hide tab strip** - shows or hides the tab strip.

You can move through a set of documents by using the navigation menu located in the upper-right corner of the core reviewer interface.



You can type a number into the textbox and hit Enter to move to that document. You can also use the navigation arrows:

			
Top of first page	Previous page	Next page	Last page

You can't browse past the last document in your returned set. For example, in the above screenshot, you can't use the navigation arrows to get to document 1,001.

1.1.6 Resetting your password

There are two ways you can reset your password if your system admin has given you the appropriate permissions. You can use the **Reset Password** option inside Relativity or the **Forgot your password?** link on the Relativity login screen.

Note: If your password has expired, the Reset Password dialog appears automatically when you log in to Relativity. Your system admin determines when your password expires and the number of previous passwords that you can't reuse.

1.1.6.1 Resetting your password inside Relativity

If you're already logged in to Relativity, you can reset your password by clicking **Reset Password** in the Home drop-down menu. This directs you to a Reset Password pop-up.

Enter your old password, then enter and retype your new password. Click **Save**.

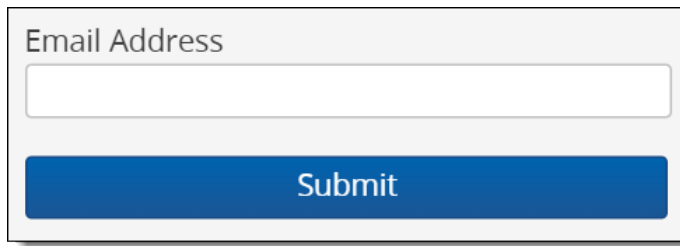
A screenshot of a 'Reset Password' dialog box. The title bar is blue with the text 'Reset Password'. Below the title bar are two buttons: 'Save' and 'Cancel'. The main content area has a light gray background and contains the following text: 'Please set a new password. Relativity requires that each password contain at least:' followed by a bulleted list: '- 8 characters (maximum 50)', '- 1 lower case letter', '- 1 upper case letter', '- 1 number', and '- 1 non-alpha-numeric-character'. Below the list are three input fields: 'Old Password:', 'New Password:', and 'Retype Password:'. Each input field has a vertical orange bar on its left side.

You can use your new password next time you log in to Relativity.

1.1.6.2 Resetting your password outside Relativity

If you can't log in to Relativity because you've forgotten your password, perform the following steps to reset your password.

1. Click **Forgot your password?** on the login screen.
2. Enter your email address in the pop-up.



Email Address

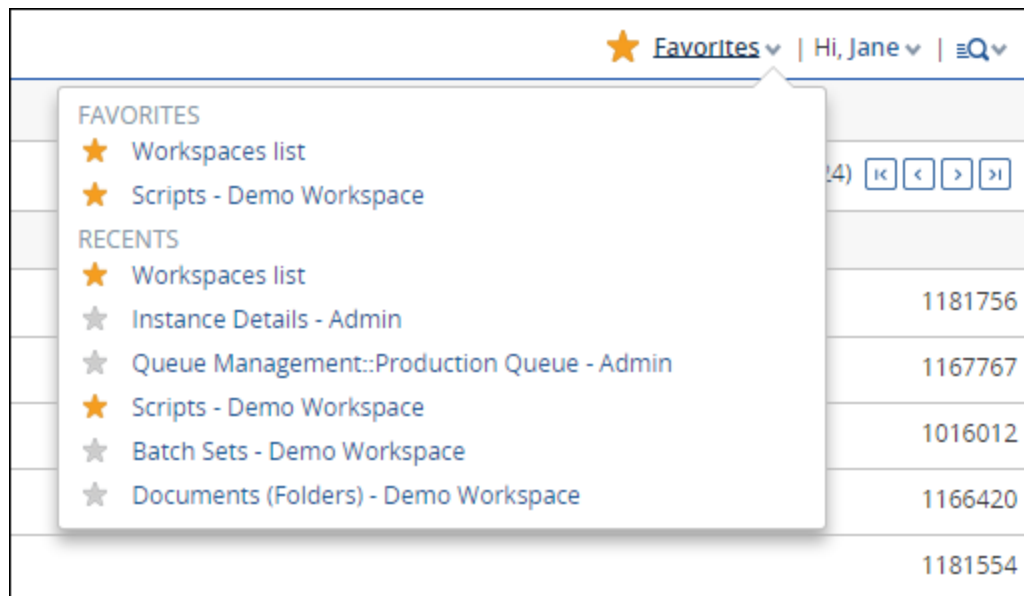
Submit

Relativity sends an email to the address you provide. You should receive this message within a few minutes. If you don't receive an email, check your spam or junk mail folder.

3. Click the link in the email to reset your password. This link will be active for 15 minutes and expires after that time. If the link has expired, or if you click the link more than once, you'll have to generate a new password reset request.
4. The link directs you to a page where you can create a new password.
5. Enter a new password and retype it, then click **Submit**. After your password successfully resets, you'll get a message prompting you to log in with your new password. An email will be sent to the address you entered, notifying you that your password reset was successful.

1.1.7 Favorites

The Favorites menu contains all your bookmarks (Favorites) and the last 10 pages in your browsing history (Recents). The Favorites menu appears at the top of the application window next to your username.



Use Favorites to quickly navigate the Relativity application. If you visit a particular page on a regular basis, minimize the number of clicks it takes to get there by adding the page as a favorite.

To mark a page a favorite, click the gray star next to Favorites, or click the gray star next to a page name in the Recents section. The star turns yellow and Relativity adds the page to the Favorites section. Relativity doesn't limit the number of pages you can mark as a favorite.

Relativity records pages in the Recents section on each page load. That means that pop-up windows aren't recorded as Recents.


Using Favorites

Imagine you're a system admin whose duties include resetting passwords for an average of 20 to 30 users per day. You could navigate to the Administration tab, then click the Users tab each time a password reset request comes through the queue, but instead you create a favorites bookmark to easily jump you the Users tab from any tab in Relativity you might be working on.

You create favorites bookmarks for all of the tabs that you most frequently visit optimizing your productivity.

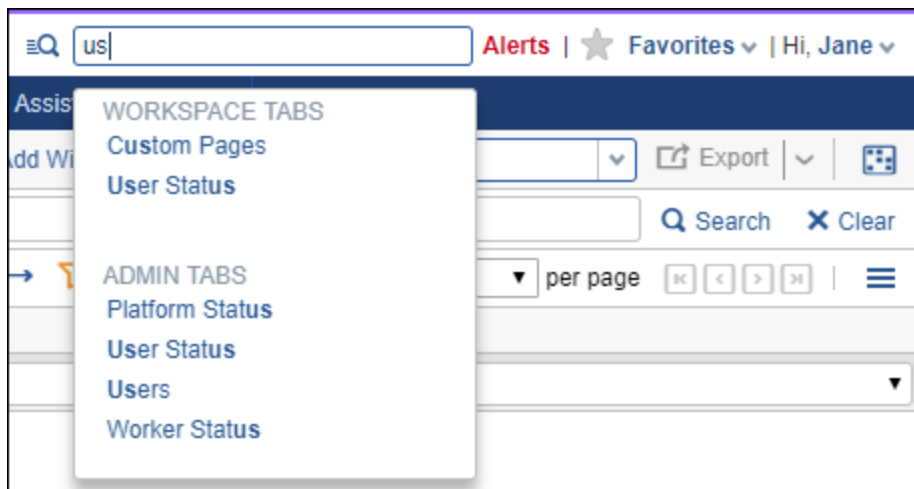
Note: If you're a system admin, you can turn off this feature by editing the RecentHistoryEnabled and FavoritesEnabled instance setting values. You can also change the number of Recents the Favorites menu displays by editing the RecentHistoryNumberOfItemsDisplays instance setting value.

1.1.8 Quick nav

Quick nav can be used to quickly search for and navigate to any workspace or tab in Relativity. To access quick nav, click  in the upper right corner of Relativity, or use the keyboard shortcut Ctrl+/.

Note: Verify that the quick nav Ctrl+/ keyboard shortcut works on custom pages. Contact Client Services with any problems.

Open quick nav, and type the name of any tab or workspace.



Any tab or workspace that contains the character string within the name appears in the list of results. Results appear after you type more than one character, and they refine with each character you type. The results link you directly to the tab or workspace in Relativity.

Note: In Relativity terms, the search works the same as a leading and trailing wildcard search.

You can click on any result or use the up and down arrow keys to move through the results. Press Enter to navigate to the selected item.

Your search remains until the page is refreshed or you navigate to a new tab. The Esc key also clears your search from quick nav. If no text is entered in the quick nav search field, Esc closes quick nav. You can also click anywhere outside the quick nav window to close it.

Quick nav displays three types of results in the following order:

- **Workspace tabs** - lists all workspace tabs that fit the search criteria and are available with your permission settings.

Note: This item only appears when you are in a workspace.

- **Admin Tabs** - lists all admin tabs that fit the search criteria and are available with your permission settings.
- **Workspaces** - lists all workspaces that fit the search criteria and are available with your permission settings. Click the workspace to go to the default tab for that workspace.

Quick nav results only reflect items available with your permission settings.

Using quick nav

Imagine you're a system admin in a workspace within Relativity, and a user emails you with a password reset request. You press Ctrl+/ and type the letters "use". The results filter to only contain Admin and Workspace tab names with the letters u-s-e.

The results display a Users tab in the Admin tabs section. You click the Users tab and find the user who needs a password reset in the list. Once their password is reset, you use quick nav to get back to the workspace you were previously working in.

1.1.9 Quick nav functionality

The following list highlights more features of quick nav functionality.

- Type the word "home" in quick nav to navigate to your default Home tab.
- Quick nav is enabled or disabled with the QuickNavEnabled instance setting.
- Quick nav is available to look up workspaces and admin tabs from Home for groups assigned the **Use Quick Nav** admin permission, and it is available to look up tabs in a workspace for groups assigned the **Use Quick Nav** workspace permission.
- The maximum number of returned quick nav search results is limited to any number between 2 and 50, but the default is 20. Use the QuickNavMaxResults instance setting to adjust the maximum number of results.
- The maximum number of searchable characters is 50.

1.2 Logging in to Relativity

Relativity offers several ways to log in and it's possible to have two or more methods available to you. As a Relativity user, your system admin provides you with all the information you need to log in.

1.2.1 Password only

This method uses only a username and a password. Your system admin provides you with:

- your log in email address
- a password request email

Prior to logging in, if you've not already, create your password. See [Creating or resetting a password on page 24](#).

To log in:

1. Navigate to the Relativity site.
2. Log in with your password. See [Logging in to Relativity with a password on page 27](#)

1.2.2 Password: two factor

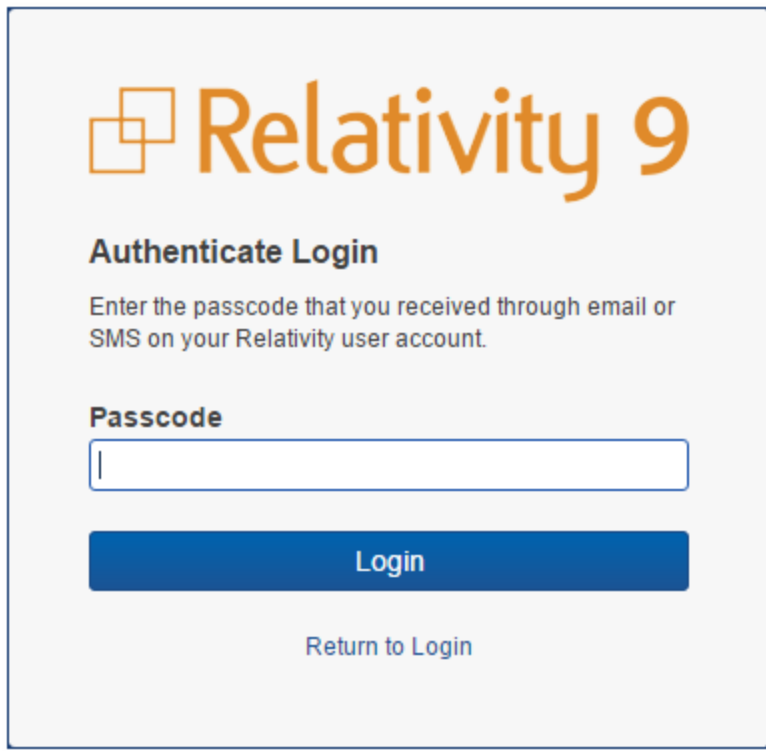
The two factor password method requires a passcode in addition to the username and password. The systems emails you the passcode during log in and is different each time. Your system admin provides you with:

- your login email address
- a password request email

Prior to logging in, if you've not already, create your password. See [Creating or resetting a password on page 24](#).

To log in:

1. Navigate to the Relativity site.
2. Log in with your password. An **Authenticate Login** dialog appears. The system immediately emails you a passcode.
3. Enter that value in **Passcode**.



4. Click **Login**.

1.2.3 Active Directory

This method uses Microsoft Active Directory Domain Services to log in. You must log in from a computer within a valid domain. Your system admin provides you with:

- your login email address
- an account on a Windows domain
- a Windows network password

To log in:

1. Navigate to the Relativity site.
2. Enter your Relativity email address in **Username**.
3. Click **Continue**.
4. Enter your Windows network password in **Password**.
Contact your system admin or IT department for password requirements.
5. Click **Login**.

1.2.4 Integrated Authentication

This method uses Integrated Windows Authentication to log in. There are no additional requirements to log in other than having a Windows domain account.

To log in, navigate to the Relativity site. The system automatically logs you in to Relativity. If you are not connected or if the [Relativity logon dialog](#) appears, contact your system admin.

1.2.5 Client Certificate

To use this method, you must have a configured smart card and a computer with a smart card reader. Your system admin provides you with:

- a personalized smart card
- a PIN
- a smart card reader
- the client certificate name
- the client certificate button name

To log in:

1. Insert the smart card into the card reader.
2. Navigate to the Relativity site.
3. Enter your username in **Username**.
4. Click the client certificate button name that your system admin indicated.
5. Select the certificate name that your system admin indicated.
6. Click **OK**.
7. Enter your PIN associated with your card.
8. Click **OK**.

1.2.6 RSA

This method requires an RSA SecurID token along with a username and passcode. Your system admin provides you with:

- your username
- an RSA SecurID token
- optionally a PIN

To log in:

1. Navigate to the Relativity site.
2. Enter your username in **Username**.
3. Click **Continue**.
4. Enter your RSA password in **Password** in the format set by your system administrator. This password is either:

- the RSA tokencode (the eight-digit number from the RSA SecurID token hardware), if you have not been assigned or created a PIN
- your combined PIN and RSA tokencode without a space between them

5. Click **Login**.

You may also be asked to create or to reset your PIN. Follow the instructions on those screens.

1.2.7 OpenID Connect

This method requires you to have an OpenID Connect account. Your system provides you with:

- an OpenID Connect account
- the Relativity OpenID Connect button name

To log in:

1. Navigate to the Relativity site.
2. Click the Relativity OpenID Connect button name.
3. Enter your username.
4. Click **Logon**.

1.2.8 SAML 2.0

This method requires you to have an account with SAML 2.0 authentication provider, for example, Okta, set up by your system admin.

To log in:

1. Log into the SAML 2.0 provider system.
2. Navigate to the Relativity instance using a shortcut in the SAML 2.0 provider interface or a bookmark in your browser. You are automatically logged in.

1.2.9 Creating or resetting a password

Use this procedure if you're logging in to Relativity for the first time or if you're resetting your password. Your system admin must send you a password reset email. If you forget your password, you can click the **Forgot your password** link on the logon screen if it is available, or contact your system admin. In either case, the system sends you a new password email.

Note: If you are a system admin, the Password Reset Email won't be sent to you. For more information, see the Authentication Guide.

1. Within the password request email, click **Reset Password** or enter the full URL into your browser.

We received a request to reset the password associated with this email address. Click the link below to reset your password. This link will expire after 15 minutes.

[Reset Password](#)

We recommend opening this link in Internet Explorer.

You can also copy and paste the following text into your address bar:


<https://ml14.testing.corp/Relativity/Identity/ResetPassword?token=74a572da-60e1-4058-2ffe-20b36965c0f9>

If you did not request this change, contact your system administrator.

Please do not reply to this email.

2. Enter a password following the restrictions listed on the screen. You must remember this password to log in. The link within the email is valid for 15 minutes, and you can only use the most recent email. Although, once the password is set, you don't have to log in immediately.

Note: The following non-alpha-numeric characters are not allowed: \, ", <, > in passwords.

 **Relativity 9**

Enter your new password and click Submit.

Relativity requires that each password contain at least:

- 8 characters minimum (maximum 50)
- 1 lower case letter
- 1 upper case letter
- 1 number
- 1 non-alpha-numeric-character


New Password

Confirm Password

Submit

[Return to Login](#)

5. Click **Submit**.

 **Relativity 9**

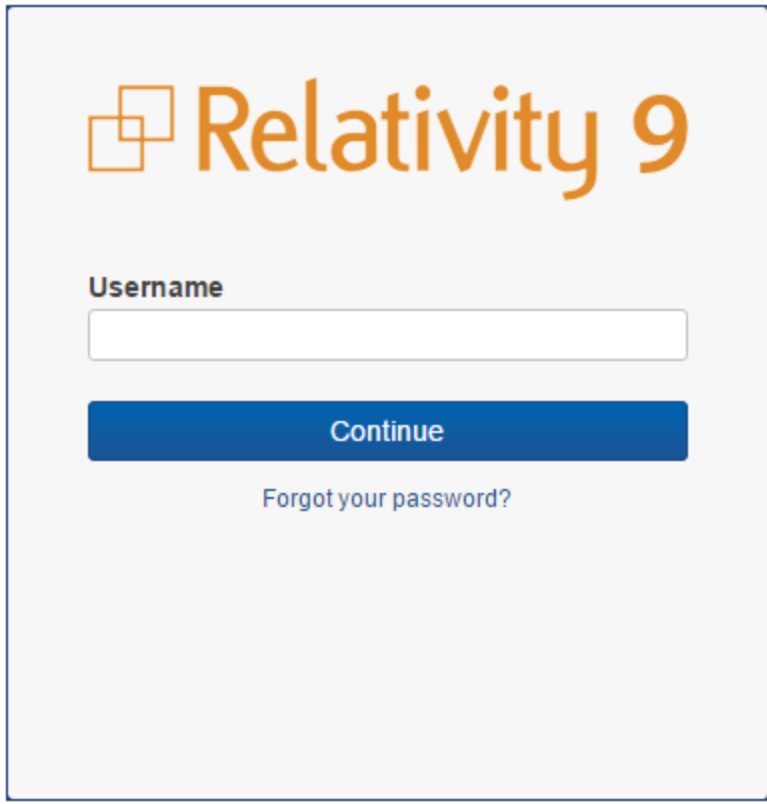
You have successfully updated your password.

[Return to Relativity](#)

6. Click **Return to Relativity**.

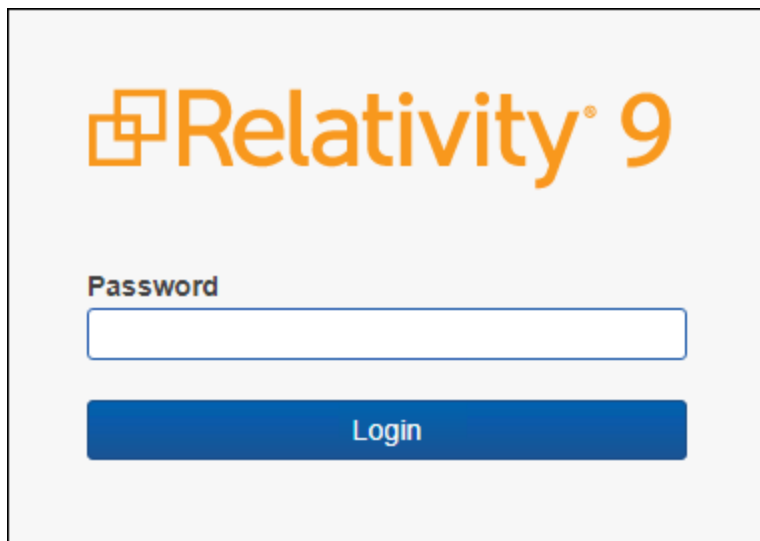
1.2.10 Logging in to Relativity with a password

1. Enter your **Username**.



The screenshot shows the Relativity 9 login interface. At the top, there is the Relativity 9 logo, which consists of three overlapping squares to the left of the text "Relativity 9". Below the logo is a label "Username" followed by a white text input field. Underneath the input field is a blue button with the text "Continue" in white. Below the button is a link that says "Forgot your password?" in a smaller, lighter font.

2. Click **Continue**.
3. Enter your password.



4. Click **Login**.

Note: The **Forgot your password?** link only displays if the admin enables Allow Password Recovery via Email setting, for more information see [Authentication](#).

2 History

On the History tab, you can view the actions of users throughout the workspace. Relativity has a comprehensive audit system that logs actions that users perform, object types, timestamps, and other details. This tab also includes views and filters to help you navigate through the audit records.

Note: When you view a document in the Core Reviewer Interface, you can display its history in the related items pane by selecting the Document History icon.

Using history

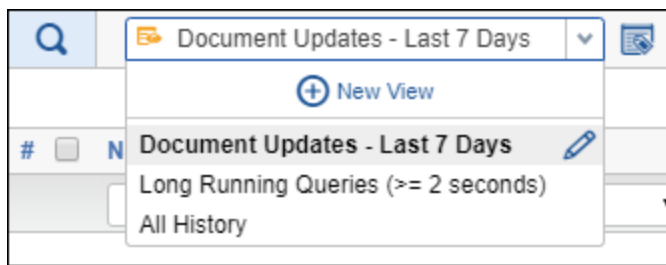
You're a system admin and you recently had to let one of your reviewers go after it was discovered that he'd insufficiently redacted sensitive information contained in a large group of documents right before you were planning to produce those documents and send them to the presiding judge. In addition to going back and correctly applying that reviewer's redactions, you need to look up all the other places in the workspace in which he might have incorrectly coded documents or, in general, entered inaccurate information.

To find all areas in the workspace that this reviewer touched, you navigate to the Administration tab, then to the History tab. Since he'd been working on this project for at least a month, you change the view from its default of Document Updates - Last 7 Days to All History. Then you simply filter the User Name field and select the name of the reviewer.

When the results come back, you notice that this reviewer was particularly active and that there are over 1,000 user actions attached to his name. To ensure that none of these actions compromised any other segment of the review project or skewed information intended to be used as evidence, you need to review each one. To help in this effort, you enlist two of your more reliable reviewers to go through this list of History items and check the departed reviewer's clicks.

2.1 History view fields

You can customize the views available on the History tab or create new views as necessary. The History tab includes pre-configured views for recently updated documents, long running queries, and imaging history, which you can modify.





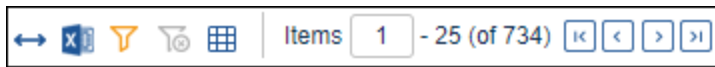
The following fields are available in views on this tab:

- **Action** - the user activity captured in the audit record.
- **Artifact ID** - the artifact ID of the audit action.

- **Details** - the detailed description of the audit action.
- **Execution time** - the length of time in milliseconds for a document query to run.
- **ID** - the identifier for the audited item; each tracked action has its own unique identifier.
- **Name** - the name of the object.
- **Object type** - the type of object.
- **Request origination** - the connection details for the user that sent the change request.
- **Timestamp** - the date and time when the audit action occurred.
- **User name** - the user who initiated the action.

2.1.1 Exporting a View

You can export the contents of a view in the Choice Legend. To begin, click the Choice Legend icon  and then click the Excel icon  in the top-right of the Choice Legend pop-up. Only the currently-loaded records are included in the Excel file. For example, in the following workspace, only 1,000 records would be included instead of the full 2,501 records.



Some features' history views are more detailed.

- For more information, see Saved search history in the Searching Guide.

2.2 Filters on the History tab

On the History tab, you can search for specific audit records by using filters just as you would on other tabs. For more information on filtering, see Filters in the Searching Guide.

You can also search for choice values using the **Details Filter**. Actions related to field choices are recorded using Artifact ID. To display the Artifact ID for choice values, click the **Choice Legend** icon in the view bar.

The screenshot shows the Relativity interface with a 'Choice Legend' pop-up window. A red arrow points to the 'Action' dropdown menu in the main table. The 'Choice Legend' window displays a table of choices with columns for ID, Choice, and Field.

ID	Choice	Field
(All)	(All)	(All)
1038830	- (hyphen)	Document Page Separator
1039450	- (hyphen)	Delimiter
1039556	- (hyphen)	Delimiter
1039557	. (period)	Delimiter
1039451	. (period)	Delimiter
1038831	. (period)	Document Page Separator
1038829	_ (underscore)	Document Page Separator
1039452	_ (underscore)	Delimiter
1039558	_ (underscore)	Delimiter
1040769	<First Name><delimiter><Last Name>	Naming Convention
1040768	<Last Name><delimiter><First Name>	Naming Convention

On the Choice Legend pop-up, you can search for choices in the workspace, their artifact IDs, and their associated fields. You can then enter the Artifact ID listed for a choice value in the Details Filter and filter the audit records.

Note: You can also use views to filter audit records. See [History view fields on page 29](#).

2.3 Audited actions

The following table lists audited actions in Relativity:

Note: If you perform a job while previewing a user's security settings, the audit action will be credited to your user name and not to the user whose security you were previewing when you started the job.

Action name	Description of activity
CaseMap - Add Document	A document was sent to CaseMap.
CaseMap - Add Fact	A selection of text from the viewer was sent to CaseMap as a fact.

Action name	Description of activity
Conversion Complete	A file was converted by way of a user clicking on a file link in the document list, running an imaging set, imaging on the fly, running a mass image operation, or switching to text or production mode in the viewer.
Create	An item was created.
Delete	An item was deleted.
Document Query	A query was run on a list of documents, or a document query was canceled. (A message indicating that a query was canceled is displayed in the details and on the Query Text pop-up.)
Export	The contents of a production set, saved search, folder, or subfolder were exported.
Images - Created	Images were created.
File Download	A file was downloaded through the Single Simple File Upload application. For example, a user clicked Download File on the Error Actions console of an individual processing error layout.
File Upload	A file was uploaded through the Single SimpleFile Upload application. For example, a user clicked Upload Replacement File on the Error Actions console of an individual processing error layout.
Images - Created for Production	Images corresponding to a production outside of Relativity were imported into the system.
Images - Deleted	Images were deleted.
Import	Content associated with a load, production, or image file was imported.
Markup - Image - Created	Redactions or highlights were added to an image.
Markup - Image - Deleted	Redactions or highlights were removed from an image.
Markup - Image - Modified	Redactions or highlights were moved, resized or edited on an image.
Markup - Native - Created	Redactions or highlights were added. This audit entry applies to transcripts only.
Markup - Native - Deleted	Redactions or highlights were removed. This audit entry applies to transcripts only.
Markup - Native - Updated	Redactions or highlights were moved, resized or edited. This audit entry applies to transcripts only.
Move	A document was moved from one folder to another.
Native - Created	A native file was loaded into Relativity.
Native - Deleted	A native file was removed from Relativity.

Action name	Description of activity
Pivot Query	A Pivot report was run, or a Pivot report was canceled. (A message indicating that a query was canceled is displayed in the details and on the Query Text pop-up.)
Print	A document was printed. (ActiveX viewer only)
Production - Add Document	A document was added to a production.
Production - Remove Document	A document was removed from a production.
Query	A process ran a query (such as categorization), or a query was canceled. (A message indicating that a query was canceled is displayed in the details and on the Query Text pop-up.)
RelativityScriptExecution	A Relativity script was run.
ReportQuery	A summary report was run.
Run	A file was imaged, saved as a PDF, or otherwise converted for viewing
Search Cache Table Creation	A search cache table was created. (Search cache tables are created the first time you search for a term or phrase using dtSearch or Relativity Analytics.)
Security	Security rights were assigned or changed
Tally/Sum/Average	The mass operation Tally/Sum/Average was run in the workspace.
Update	Document metadata was updated on a single-document basis. In addition, filters on information related to applications installed through the workspace or by an agent.
Update - Mass Edit	Document metadata was updated on a mass basis.
Update - Mass Replace	Document metadata was edited using a text mass replacement.
Update - Propagation	Document metadata was edited according to a propagation rule.
View	A document was viewed.
Workspace Upgrade	Details about scripts run on a workspace during an upgrade.

Note: No login action exists when you access a workspace. Relativity interprets the login based on any other auditable action in the workspace. For example, if you view a document in Workspace A, Relativity audits that view action on the History tab and indicates that a user accessed Workspace A.

2.4 Exporting the history list

You can export a history list view as a .CSV file using the following steps:

1. Navigate to the **History** tab.
2. Select the history objects you would to export.

3. Click **Export to File**.
4. A pop-up appears. Select values for the fields:
 1. **Format** - select comma Separated Values (.csv), which creates a comma delimited text file.
 2. **Encoding** - select the desired encoding for the output file.
 3. **Escape Formulas** - select yes or no. When you select yes, any line starts with the following special characters: =,@,+,-, or if the line starts with any combination of spaces before those characters, Relativity prepends a single quote to the line.
5. Click **Run** to export the file or **Cancel** to cancel the export.

3 Markups

Markups in Relativity refer to [highlights](#) and [redactions](#). You can add markups to documents that contain an image using the Viewer Image mode. When you open a document in the core reviewer interface, select **Image** to image the document if necessary and open the document as an image.

Note: If two people edit a markup at the same time, an error occurs.

Also see this related recipe:

- [Using redactions from other applications](#)

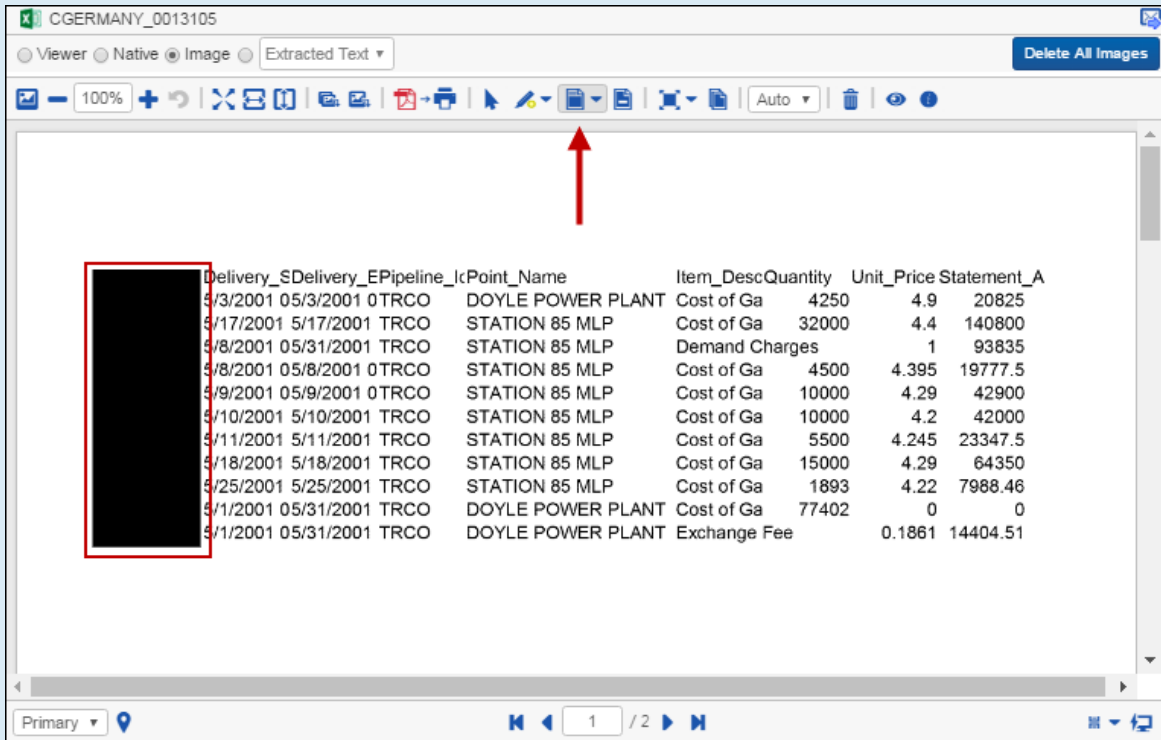
Using markups

You're a reviewer at a law firm, and one of your firm's clients, a construction company, is involved in litigation regarding the use of materials that they weren't informed were potentially environmentally damaging when they purchased them from a major supplier.

Included in the data set are many invoices from the past year that contain the various department and personal credit cards numbers used to purchase said materials, as well as a few instances of social security numbers used in conjunction with those cards.

These invoices are crucial pieces of evidence that your firm plans on producing and handing over to the judge. Before those documents can be produced, however, you need to go through them and find all instances of credit card and social security numbers and apply redactions to those instances, as this is sensitive information.

Your system admin has already set up a view specifically for invoices, bank statements, and other files related to purchases and accounts. To redact any sensitive information contained in these documents, you open them in the Viewer and scan the imaged document for instances of said numbers. When you come across them, you select the black redaction and draw it over the number or list of numbers you need to obscure.



Now there's no danger of your production being tainted by inadvertently revealing this sensitive information, which in some cases could render the produced documents inadmissible.

3.1 Permissions

The following permissions are required to use markups:

Object Security	Tab Visibility
Document: View, Edit <ul style="list-style-type: none"> Redact Document Highlight Document 	Documents


Note: The Redact Document and Highlight Document allow a user to apply any redaction and any highlight respectively. For example, if the user has the Redact Document permission and not the Highlight Document permission, they can apply any redactions but they cannot apply any highlights.

3.2 Highlights

When you create a highlight, a colored box appears in the area you select, just like using a highlighter.

3.2.1 Creating highlights

To create a highlight, perform the following steps:

1. Click . Yellow is the default color. Click the drop-down menu to select a different color.
2. Draw the highlight across the section(s) of text you want to highlight.

When you create a highlight, it appears in the Markup Navigation Pane. See [Using the Markup Navigation pane on page 43](#).

3.3 Redactions



A redaction hides text on a page. In Relativity, you can create several different types of redactions:

- [Creating basic redactions below](#)
- [Creating inverse redactions on the next page](#)
- [Creating full-page redactions on the next page](#)
- [Creating mass redactions on page 39](#)

When you create a redaction, it appears in the Markup Navigation Pane. See [Using the Markup Navigation pane on page 43](#).


3.3.1 Creating basic redactions

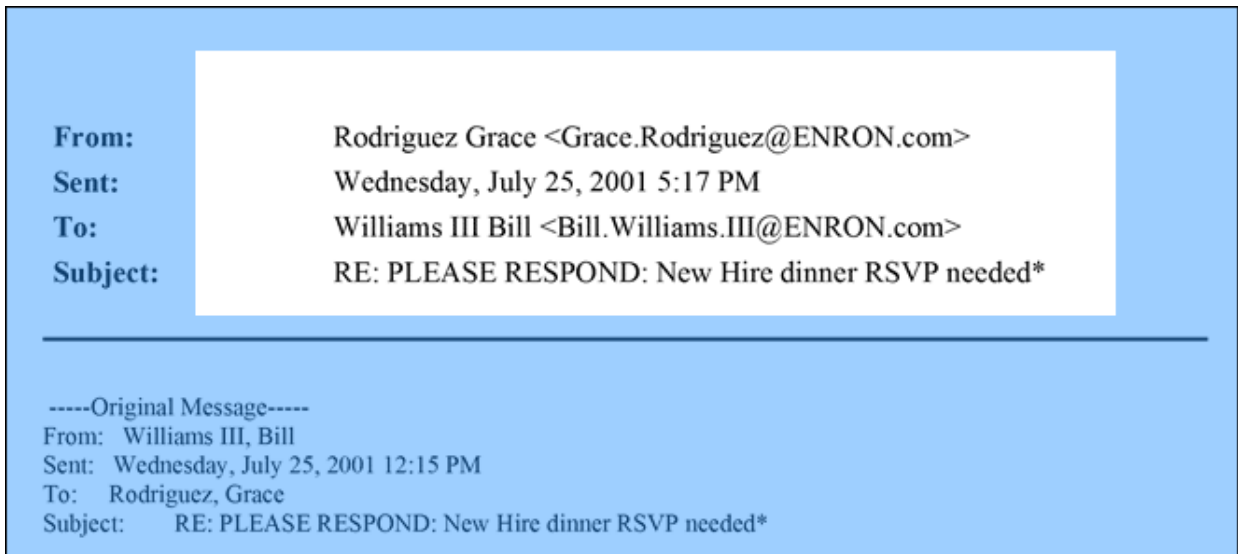
To apply a basic redaction to a document, perform the following steps:

1. Click . The black redaction tool is the default. Click the drop-down menu to select a different tool. You can select from the following:
 - **Black** - creates a solid black box, like using a black marker. While you draw the box, a gray translucent fill appears.
 - **Cross** - creates a white redaction box black border and a black X from corner to corner.
 - **Text** - creates a white redaction box with black text. The text will fill the box by default. To change the font size, keep the redaction box selected and click , and then select a new font size from the drop-down menu. You can right-click a text box redaction to apply different text. See [Editing redaction text on page 41](#). The system admin determines which text options are available.
 - **White** - creates a solid white box with a gray border. The gray border won't be printed or produced.
2. Draw the redaction box(es) across the section(s) of the page you want to redact. You can draw in any direction.


3.3.2 Creating inverse redactions

An inverse redaction creates a black redaction across the full page except on the locations where you draw boxes. To create an inverse redaction, perform the following steps:

1. Click .
2. Draw the inverse redaction box(es) across the section(s) of the page you do not want to redact. A blue cast indicates where the black redaction is created, and the white box indicates the area that is not redacted. You can move or resize the white box using the controls. You can also highlight text that is not redacted.



3.3.3 Creating full-page redactions

A full-page redaction creates a redaction across the entire page. To apply a full-page redaction, click . The black full page redaction tool is the default. Click the drop-down menu to select a different tool. You can select from the following:


- **Black** - creates a solid black box, like using a black marker.
- **Cross** - creates a white redaction box with a black border and a black X from corner to corner.
- **Text** - creates a white redaction box with black text. You can right-click a text box redaction to apply different text. See [Editing redaction text on page 41](#). The system admin determines which text options are available.
- **White** - creates a solid white box with a gray border. The gray border won't be printed or produced.

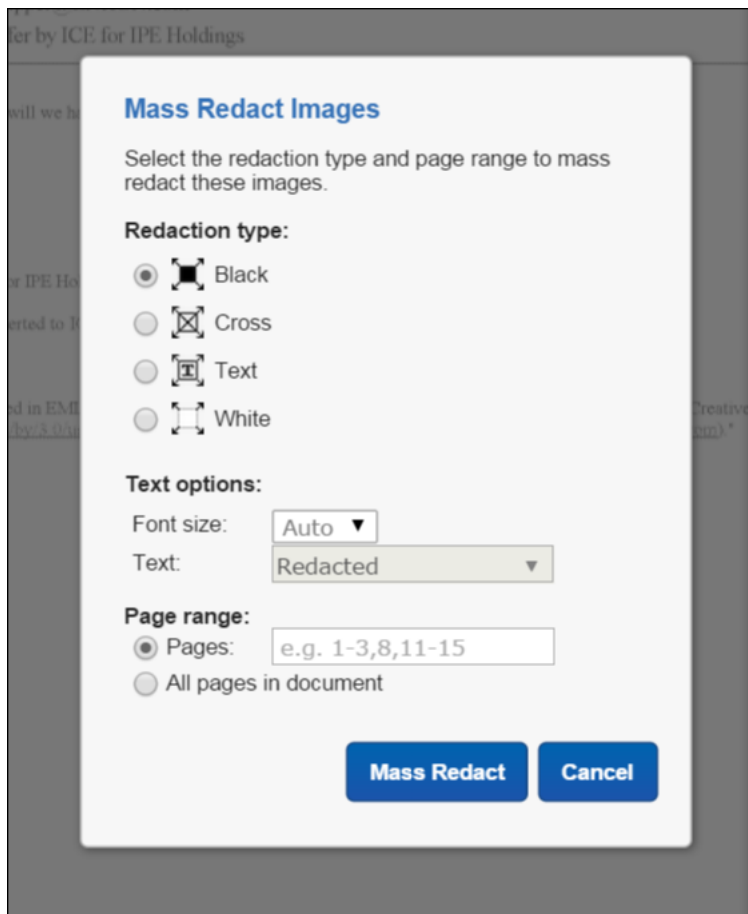
You can also create a keyboard shortcut to apply a full-page redaction. See [Creating keyboard shortcuts in the Admin guide](#).

After you apply a full-page redaction, you can resize it to make it smaller than the full page and then work with it like a normal redaction.

3.3.4 Creating mass redactions

You can use the mass redact option to apply full-page redactions of any type to a set of pages in your document. To apply mass redactions, perform the following steps:

1. Click . The Mass Redact Options pop-up appears.
2. Select the type of redaction to apply. You can select from the following:




- **Black** - creates a solid black box, like using a black marker.
- **Cross** - creates a white redaction box with a black border and a black X from corner to corner.
- **Text** - creates a white redaction box with black text. In the Text Options section, you can select the font size and text to apply to the redactions. To apply custom text, select **<Enter Custom Text>** from the **Text** drop-down menu, then enter the text in the **Text** field.
- **White** - creates a solid white box with a gray border. The gray border won't be printed or produced.

3. Specify a range of images to apply the redaction to. Select **Pages** and enter a set of pages or select **All pages in document** to apply the full-page redactions to the entire document.
4. Click **OK**. The redactions apply to the set of pages you specify.

3.4 Editing markups

To resize a single markup, click inside the markup shape. White dot controls appear on the corners and edges of the markup. Select any control and drag to resize the markup.

You can move or delete markups individually or as a set. To select multiple markups, click the selector tool  and drag across the markups. Alternatively, press **Shift** or **Ctrl** and click to select individual markups, or click **Ctrl + A** to select all markups on an image. Controls appear on the corners and edges of all selected markups.

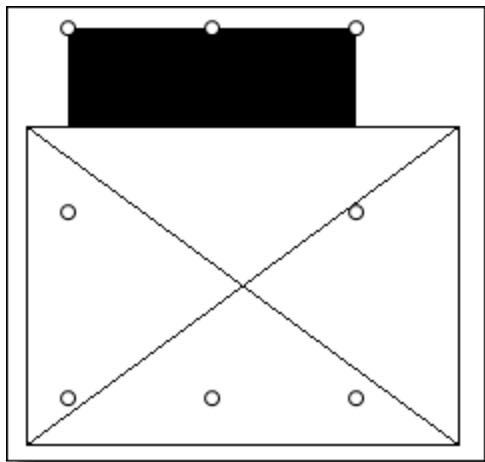
To move, click and drag the selected markups to a new location. You can also move selected markups using the arrow keys. Each time you hit an arrow key, the markups move 10 pixels in that direction. For finer control, hold **Ctrl** while pressing an arrow key, and the markups move only 1 pixel in that direction.

To delete, right-click a selected markup and click **Delete**. You can also press the **Delete** key and click **Yes** on the Confirm Delete pop-up. All selected markups are deleted. For Mac users, press **Fn + Delete**.

Note: If you have a full-page redaction applied to an image, then you apply an additional full-page redaction, the most recently applied full-page redaction appears on top. If you then delete the second redaction, the first full-page redaction persists.

3.4.1 Working with overlapping markups

If you have multiple markups on a page that overlap each other, when you hover over the markups, translucent controls appear. Click the markup you want to work with, and the controls become active to indicate which markup is active. In the following example, the black box redaction is active.



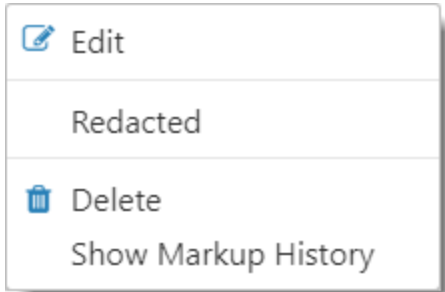
3.4.2 Editing redaction text with a markup set

When you create a text redaction, it will display the most recent word or phrase you entered while editing a redaction. If you have never edited or created a text redaction before, it will display **Redacted** instead.

To perform this task you need the permissions for the markup sets object as well as the individual markup set you wish to use.

To edit the text in a text box redaction using the default text for a markup set, perform the following steps:

1. Choose the desired markup set from the drop-down in the bottom-left corner of the Viewer.
2. Right-click the redaction and select the default redaction text from the markup set.

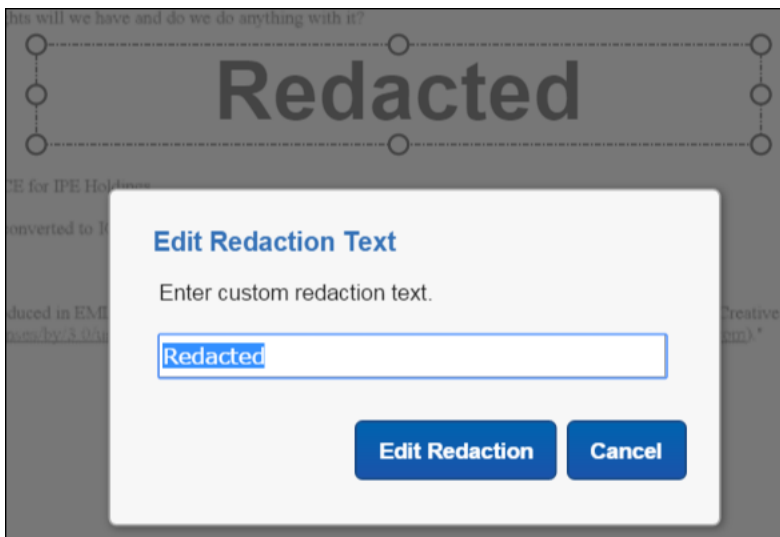


The new text appears in the redaction.

3.4.3 Editing redaction text

To edit the text in a text box redaction, perform the following steps:

1. Right-click the redaction and select **Edit**.
The Enter Redaction Text pop-up opens.



2. Enter the new redaction text in the field and click **Edit Redaction**.

The new text appears in the redaction. Any new redactions you create will display the same text until you edit a redaction or use the default Redacted option.

3.4.4 Editing font size in text box redactions

The font size for text box redactions defaults to fill the entire text box. To edit the font size, perform the following steps:

1. Select the text box redaction(s). You can press **Ctrl** or **Shift** and click to select multiple text box redactions.

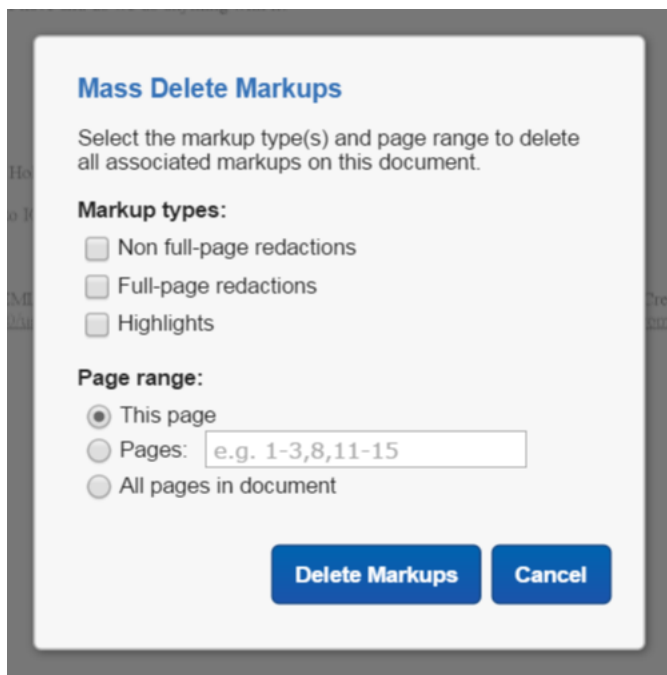
2. Click the Font Size tool  and select a font size. The font size applies to the text in all selected text box redactions.

When you create a new text box redaction, the last selected font size automatically applies to the text.

3.5 Mass deleting markups

You can mass delete markups from a single page, from a range of pages, or from your entire document at once using the delete redactions and highlights option. To mass delete markups, perform the following steps:

1. Click . The Mass Delete Markup Options pop-up appears.



2. Select the markup types you want to delete. You can select **Non full-page redactions**, **Full-page redactions**, **Highlights**, or any combination of these.
3. Select the range of pages from which to delete the selected markups. You can select **This page**, **Pages** (enter a set of pages), or **All pages in document**.

4. Click **Delete Markups**. The selected markup types are deleted from the range of pages you selected.

3.6 Controlling markup visibility

You can toggle redaction visibility between visible, transparent, and invisible. Use the **Change Markup**

Visibility button  to change the setting.


- Click once to set the markups to transparent.
- Click a second time to set the markups to invisible. The redactions are not deleted, just temporarily hidden.
- Click a third time to return the markups to full visibility.

3.7 Viewing markup history

To view the history of any highlight or redaction, right-click it and select **Show Markup History**. The Markup Information pop-up appears with information identifying each action, the user who performed the action, and the date and time at which the action was performed.

3.8 Using the Markup Navigation pane

In the viewer, you can locate markups in a document using the Markup Navigation pane. To open this

pane, click  in the lower left corner of the viewer. The Markup Navigation pane displays a list of all redactions and highlights that reviewers created in the document, as well as references to their page numbers and parent markup sets.

Markup Navigation					
Page Number	Markup Type	Markup SubType	Markup Text	Full Page	Markup Set
(All)	(All) ▼	(All) ▼	(All)	(All) ▼	(All)
1	Redaction	Black			Primary
1	Redaction	Black			Primary
1	Redaction	Text	Redacted		Primary

You can click the markup type hyperlink to jump to the page where the markup occurs. In addition, Relativity updates the active markup set to the one associated with your hyperlinked selection in the Markup Navigation pane.

4 Persistent highlight sets

With persistent highlight sets you can configure and apply term highlighting to assist with document review in the viewer. In the Persistent Highlight Pane of the viewer, you can see all sets saved in a workspace and apply or hide term highlights in the document you're reviewing.

If a document you're reviewing contains any of the terms specified in a set, the list of terms and the number of times they appear in the document appear under the set. If a document contains no terms from the set, you can't expand or collapse the set in the tree. If the document contains some terms in the set, only the terms that exist in the document appear below the set name.

System admins can control which highlight sets different users see when working within a document. See [Workspace security](#) in the Admin guide.

Persistent highlight sets are independent of markup sets. See [Markup sets](#) in the Admin guide.

Using persistent highlight sets

You're a system admin and one of your clients, a medical patient advocate group, is suing a hospital system because their IT department accidentally allowed a security breach that resulted in the theft of thousands of patients' social security numbers and pieces of personal health information.

The data set you need to review for this case includes thousands of emails, invoices, and other notifications containing references to the pieces of information that were compromised in the breach. You need to equip a small group of reviewers with everything they need to find relevant documents as quickly as possible. You want your reviewers to find and code all files related to the following:

- Social security number
- Biometrics
- Medicare
- Insurance
- Diagnosis
- Treatment
- Beneficiaries

You created coding layouts, views, and search indexes, and now you want to enable your reviewers to quickly and easily locate instances of these terms in the documents they're reviewing. For that, you use persistent highlight sets.

You create a new persistent highlight set with a name of "Patient Privacy," which is congruent with the other objects you've already set up for this case. You give this set an order of 10 and you select Terms for the Source field choice. Then, in the Terms field, you enter the terms most prevalent to the data set and the specific highlight colors in which you want those terms to appear.

Persistent Highlight Set Information

Name: Patient Privacy

Order: 10

Source: Highlight Fields Terms
Manage

Highlight Fields: ...

Terms: 3;16;beneficiary
4;16;diagnosis
5;16;medicare
6;16;social
7;16;insurance

When you save this new persistent highlight set, reviewers can select it from a menu for every document they load in the Viewer. When they apply highlights, the document instantly points them to the locations of each term that appears. From there, they can easily tell if the document is responsive and if it's worthy of being coded for some of the issues you've defined in this case. With this new persistent highlight set, you've expedited and ensured a thorough document review project.



4.1 Getting started with persistent highlight sets



You create persistent highlight sets in the **Persistent Highlight Sets** tab of a workspace. Each set includes a list of terms populated manually or from a source field in the set configuration. After you create a persistent highlight set, the set and its terms are available in the Persistent Highlight Pane of the viewer.

The following persistent highlight set includes several terms with highlight color-coding. See [Color-coding persistent highlights on page 51](#) for more information.

This set is available when a user opens the viewer and any edits made to this set are reflected immediately.

4.1.1 Showing and hiding persistent highlight sets in the viewer

To view the list of available persistent highlights sets and related terms in the Persistent Highlight pane, click the Show/Hide Persistent Highlight Pane icon  on the left side of the toolbar. To hide the pane, click  again.

Click the + sign next to a persistent highlight set to expand it and show the list of terms from that set found in the document. By default, all persistent highlight sets are enabled in the viewer, and terms found in a document are selected in the Persistent Highlight Pane and highlighted in the document. Click a persistent highlight set's name or the  icon to hide all term highlights from the set in the viewer. When a persistent highlight set's icon is  and the terms appear partially transparent in the Persistent Highlight Pane, the term highlights for the set are hidden in the viewer.

Clear a term's check box to hide its highlights in the viewer. Select its check box to apply highlighting for the term in the viewer again.

If any of the set's terms aren't present in the current document open in the viewer, they don't display in the Persistent Highlight Pane. For example, if you created a set named Investments that contains five highlight terms, and only three of the terms show in the pane for a particular document, the other two terms aren't present in the document.

When you select a persistent highlight term in the Persistent Highlight Pane, in addition to highlighting all instances of that term in the body of an email, the viewer also highlights instances of the term in the email header.

If a document doesn't contain any terms found in a set, you won't have the + expand option for the set in the pane. It is possible to have many highlight sets enabled but no highlights appear in a document.

Selections made in the Persistent Highlight pane persist throughout a user's session in Relativity. This includes any of the following changes related to the Persistent Highlight Pane in the viewer:

- Showing or hiding the Persistent Highlight Pane.
- Enabling or disabling a persistent highlight set.
- Expanding or collapsing the term list for a persistent highlight set.
- Checking or clearing terms check boxes in a persistent highlight set.

4.1.2 Navigating highlighted terms in the viewer

To navigate between terms highlighted on a document in the viewer, use the **Go to Previous Highlight**



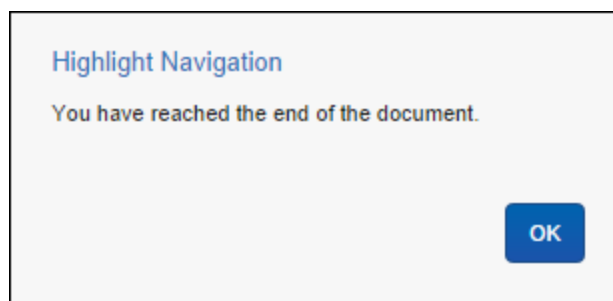
and **Go to Next Highlight**



buttons on the viewer toolbar.

The **Go to Previous Highlight** and **Go to Next Highlight** buttons only navigate between terms enabled in the Persistent Highlight Pane.

When navigating through a document's highlighted terms, the following notification informs you when you reach the beginning or end of the document and there are no more highlights.




4.1.2.1 Active and inactive highlights

To support advanced highlights within persistent highlight sets, two types colors can be available in the viewer - active and inactive highlights. The colors are the same, but have a different level of opacity. Active highlights are the highlights that the viewer is focused on. Active highlights are at full opacity and inactive highlights are at a lower opacity level. See [Color-coding persistent highlights](#) for more information.

Note: The opacity level of the highlights for proximity searching and inactive terms can be adjusted by editing the value of the **ViewerHighlightStyleDefault** instance setting.

Color name	Active Color	Inactive Color	Number
[Default]			0
Black			1
Dark red			2
Dark green			3

Color name	Active Color	Inactive Color	Number
Dark yellow			4
Dark blue			5
Dark magenta			6
Dark cyan			7
Light gray			8
Gray			9
Red			10
Green			11
Yellow			12
Blue			13
Magenta			14
Cyan			15
White			16

4.1.3 Persistent highlight set behavior across viewer modes

Note the following regarding persistent highlight set behavior as the reviewer moves from document to document, changes viewer modes, and uses pane toggles:

- Any changes made to a persistent highlight set tree in the panel when the viewer is undocked, such as terms selected or unselected, will display when the viewer is docked again.
- A synced standalone viewer won't display changes made to a persistent highlight set, such as terms selected or unselected, in the pane of the main viewer. However, Persistent Highlight Pane settings remain the same in the standalone viewer as the reviewer goes from doc to doc within the standalone viewer.
- The Persistent Highlight Pane maintains its current state when you swap viewer panes.
- The Persistent Highlight Pane in Extracted Text mode and Viewer mode are independent of each other. A change made to the pane in Extracted Text mode is not automatically reflected when the reviewer switches to Viewer mode and vice versa.
- Advanced persistent highlighting, available when using a search term report as a highlight field source, is only available in the primary viewer mode. See [Using the highlight fields source on page 52](#).

See the Viewer documentation in the Admin Guide.

4.1.4 Persistent highlight behavior

When using a search term report that includes search syntax as a highlights source field, the highlight behavior is more inclusive than using persistent highlight terms. See [Using the highlight fields source on page 52](#).

The different levels of opacity occur on a key term and interval term level. The key terms in the search are high opacity level highlights. The other interval terms picked up with search syntax are highlighted at a lower opacity level. For example, if you use the search "account w/5 cap" the words "account" and "cap" are highlighted with the full opacity highlight. The words between "account" and "cap" will have the lower opacity level highlight.

(Click to expand)

4.2 Creating persistent highlight sets

To create a new persistent highlight set, follow these steps.

Note: If you plan to use the Source: Highlight Fields, you may need to create a search terms report. For more information, see [Using the highlight fields source on page 52](#).

1. Select the **Persistent Highlight Sets** tab from a workspace.
2. Click **New Persistent Highlight Set**.
3. Complete all required fields in the persistent highlight set information section. See [Fields on the next page](#) for details.

The screenshot shows a software interface for creating a Persistent Highlight Set. At the top, there is a navigation bar with tabs: Entities, Documents, Workspace Admin, Processing, Indexing & Analytics, and Case Admin. Below the navigation bar is a header for the form: Persistent Highlight Set Layout, with buttons for Save, Save and New, Save and Back, and Cancel. The main form area is titled Persistent Highlight Set Information and contains the following fields:

- Name: A text input field.
- Order: A text input field.
- Source: Two radio buttons, Highlight Fields and Terms. Below the radio buttons is a Manage link.
- Highlight Fields: A blue button with three dots.
- Terms: A large text area.


At the bottom of the form is a Record History section with two fields: System Created On and System Last Modified On.

4. Click **Save**.

Note: Verify that reviewers are not actively reviewing documents when creating Persistent Highlight Sets. Creating Persistent Highlight Sets while reviewers are actively reviewing documents can cause errors.

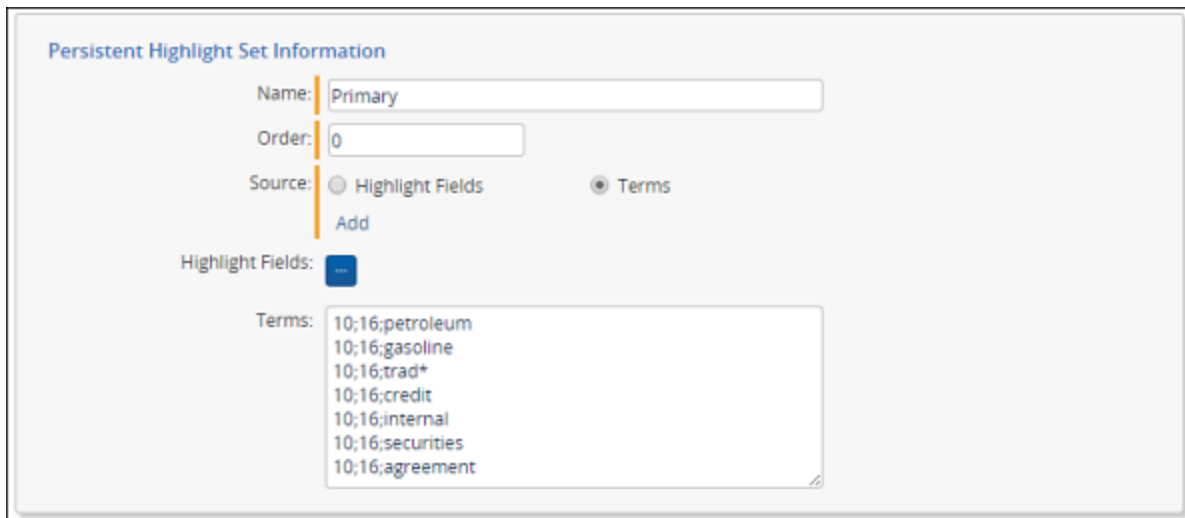
4.2.1 Fields

Persistent highlight sets include the following fields.

- **Name**- the descriptive name under which you want this set to appear in the Viewer and item list.
- **Order** -the order in which you want this set to appear.
- **Source** - determines the area the set draws from when designating characters to be highlighted and displayed in the Viewer. There are two options:
 - **Highlight Fields** - designates fields as the source of highlighting. Highlight Fields is capable of using dtSearch functionality. Selecting this radio button means you must select a Highlight Field in order to save this set.
 - **Terms**- designates terms as the source of highlighting. Selecting this radio button means you must enter terms into the Terms field below to save this set.
- **Highlight Fields**- choose the field referencing the list of terms to be highlighted. Click  to bring up the system view called Field Picker on Persistent Highlight Sets, which displays the Name and Object Type for applicable multiple object fields. It also includes those created by Search Terms Reports. To select the desired Highlight Field, check the field's box, click Add, and click Set. The field displays on the layout. See [Using the highlight fields source on page 52](#).
- **Terms** - enter terms you wish to highlight and select the color code to distinguish them in the Viewer. See [Entering highlight terms below](#).

4.3 Entering highlight terms

If you choose **Terms** as the source of your highlighting, you have to enter the terms in the Terms field text box to save the new highlight set. You also have the option of applying color-coding to these terms in the Viewer.




Persistent Highlight Set Information

Name:

Order:

Source: Highlight Fields Terms

Highlight Fields: 

Terms:

4.3.1 Color-coding persistent highlights

When you enter a term in the Highlight Terms box, you can also specify the color for both the text and the background. Use the following format to color-code your persistently highlighted text:

[background color];[text color];[term to be highlighted]

For example, enter “3;16;Relativity” to highlight Relativity with dark green background and white text. Highlights are rendered at full opacity (using the original highlight color) when they are active. When they are not active, they will be rendered in a lighter shade of the original highlight color.

The following table includes available color codes.

Color name	Active Color	Inactive Color	Number
[Default]			0
Black	Black	Light gray	1
Dark red	Dark red	Light red	2
Dark green	Dark green	Light green	3
Dark yellow	Dark yellow	Light yellow	4
Dark blue	Dark blue	Light blue	5
Dark magenta	Dark magenta	Light magenta	6
Dark cyan	Dark cyan	Light cyan	7
Light gray	Light gray	Light gray	8
Gray	Gray	Light gray	9
Red	Red	Light red	10
Green	Green	Light green	11
Yellow	Yellow	Light yellow	12
Blue	Blue	Light blue	13
Magenta	Magenta	Light magenta	14
Cyan	Cyan	Light cyan	15
White	White	Light gray	16

If you enter terms with no color-coding, the background defaults to magenta and black text.

Note: Default has different implications for text and background. The default background color is white and the default text color is black.

4.3.2 Guidelines for adding terms or phrases

Use the following guidelines when adding terms or phrases into the Terms text box:

- Enter a term that you want highlighted and press **Enter**. You can enter multiple terms but each one must be on a separate line.
- Enter terms for persistent highlighting exactly as they appear in the document. Don't use quotation marks and connectors.

Note: Quotation marks are not compatible with persistent highlighting with terms as a source, which automatically searches for an exact phrase. Using quotation marks results in slower document loading speeds.


- Keep lists simple. Do not use punctuation, special characters, or operators. Do not use dtSearch syntax when entering a list of terms as the source for the set. You may use dtSearch index terms in a search terms report, then use Fields as the Persistent Highlight Source instead to support highlights for dtSearch syntax.
 - AND or OR operators are not used in keyword searching. If used, Relativity looks for the exact phrase including *AND* or *OR*. For example, you entered these search terms: *Apple AND Banana*. Relativity highlights the entire phrase *apple and banana* in the document. Separate occurrences of *apple*, and occurrences of *banana*, are not highlighted.
 - Persistent highlight set terms do support wildcards. You can view highlighted terms that contain an * (asterisk) character, including a wildcard in the middle of a term. For example:

Note: Wildcards in persistent highlight terms do not respect special characters for highlighting in the HTML5 viewer. For instance, if a term contains *test** then only the word *test* highlights.

- *term** matches and highlights any word that starts with *term* with zero or more following characters.
 - **term* matches and highlights any word that ends with *term* with zero or more preceding characters.
 - **term** matches and highlights any word that has *term* in it with zero or more preceding or following characters.
- Do not enter duplicate terms.
 - Identify and remove terms with large hit counts.
 - List variations of a term first and enter the root term last.
 - If the list of terms is large (>100 terms), use Highlight Fields with a Search Terms Report. For more information, see [Search terms reports on page 60](#).

4.4 Using the highlight fields source

Using the Highlight Fields source in a persistent highlight set you can choose a field referencing a list of terms to highlight.

Select the Highlight Fields source, and then click the  to open the field picker on Persistent Highlight Sets system view. This system view displays the Name and Object Type for applicable multiple object fields, including those created by Search Terms Reports.

Note: Persistent highlights generated by a search terms report don't automatically update after you load new data into a workspace. To incorporate the text from new documents, perform either a full or incremental build on the dtSearch Index, then a full or incremental build on the search terms report.

To select a Highlight Field, check the field's box, click **Add** followed by **Set**. The field appears on the layout.

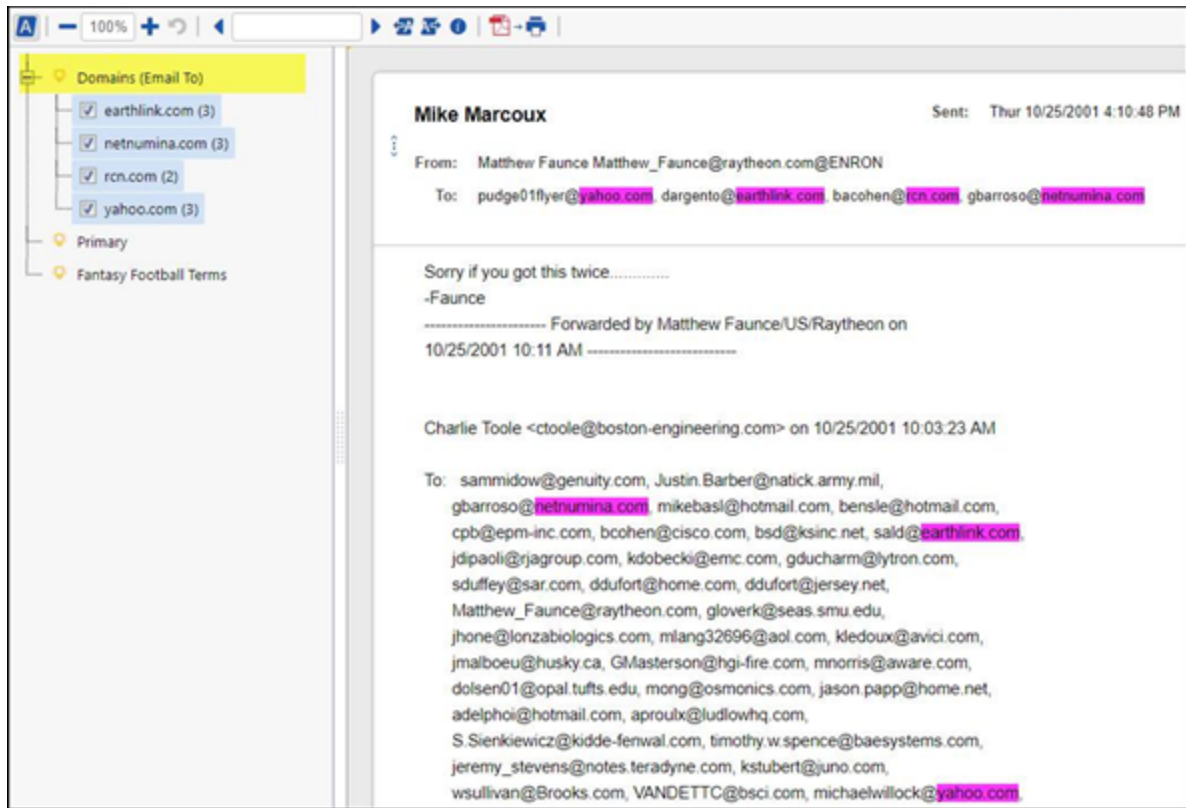
Note: We recommend selecting a search terms report or the Domains field as your highlight fields source.

When using a Search Terms Report as the highlight fields source, the number of terms that Relativity searches for will vary among different records. Relativity only looks for the terms listed in the Search Terms Report for that document.

#	<input type="checkbox"/>	Control Number	File Name	STR - Terms for Persistent Highlight Set
1	<input type="checkbox"/>	AZIPPER_0008560	Broker & Exchange Detail 6-5-01.xls	energy oil trad*
2	<input type="checkbox"/>	AZIPPER_0008564	RE: John Cummings Update.htm	oil trad*
3	<input type="checkbox"/>	AZIPPER_0008582	RE: Enron Concerns about JavaSoft.htm	trad*

The application highlights only the terms in the STR field created by the Report and Tag Search Term Report for each document.

Relativity exhibits similar behavior when using an email Domains field as the highlight fields source. Relativity only looks for the email domains listed in the field for that document.



4.4.1 Best practices

Consider the following guidelines when creating or adding terms using Search Terms Reports as the highlight fields source:

- Enter terms exactly as they appear in the document.
- Starting with Relativity 9.6.202.10, you can use operators such as AND and OR. For example, if you enter these search terms: Apple AND Banana, Relativity would highlight the two terms "apple" and "banana" in the document. See [Search terms reports on page 60](#) for more information.
- Wildcards are useful in some cases. For example, the search term *appl** highlights *apple*, *application*, *applies*, and so on. An excessive use of wildcards affects performance. Leading wildcards such as **itting*, are not recommended. Using asterisks in the middle of a term don't count as wildcards.
- Starting with Relativity 9.6.202.10, dtSearch operators can be used to highlight searches when used for a Persistent Highlight Sets in the HTML5 Viewer in Viewer mode. You must use a Highlight Fields source (such as a Search Terms Report results field) to use dtSearch syntax. Relativity dtSearch operators are not supported in the Extracted Text mode of the Viewer or the ActiveX viewer. The highlights for these searches use the active and inactive highlighting functionality. Active highlights are the highlights that the Viewer is focused on and display with full opacity. Inactive highlights display at a lower opacity level.

Note: The increase of dtSearch operators does decrease performance.

- Persistent highlight does understand proximity searching. If you enter the phrase *Relativity w/5 software* as a search term, the search term report uses a dtSearch to find and tag all documents that meet the criteria. When viewed in the Viewer, the persistent highlighting functions as a dtSearch.
- Persistent highlights does understand the stemming character (~). If you enter the term *apply~* as a search term, the search term report finds and tags all documents with the word apply, or any document that stems from apply; including applied, applies, application, and so on. When looking at the document in the Viewer, the persistent highlight functions as a dtSearch. See [Search terms reports on page 60](#) for information on supported syntax.
- Any operator in quotes will be treated as literal by the Viewer search. For example, stemming “~” and wildcard “*” operators. However, dtSearch will treat stemming and wild card operators in quotes not as literal, but as the operator itself. For example, "run~" in the Viewer will find the exact phrase “run~” and "run~" in dtSearch will return hits for run, runner, running, etc.

4.5 Importing search terms for persistent highlighting

To import search terms to use as a source for persistent highlighting perform the following procedures.

4.5.1 Relativity component setup

Before importing search terms, use the following steps to create a Relativity Dynamic Object to handle the data.

1. Navigate to the **Object Type** tab in your workspace.
2. Click **New Object Type**.
 - a. Provide a name for the new object in the required **Name** property.
 - b. Keep all remaining properties at their default values.
 - c. Click **Save**.
3. Navigate to the **Fields** tab.
4. Click **New Field** to create the field that to hold the persistent highlight color information. This field also connects your Dynamic Object to the Document object.
5. In the New Field form, specify the following properties:
 - a. **Object Type**- <Dynamic Object created in step 2>
 - b. **Name**- Highlight Colors
 - c. **Field Type**- Fixed-Length Text
 - d. **Length**- 10
 - e. Keep all remaining properties at their default values.
 - f. Click **Save and New**.
6. Create a new field to link your Dynamic Object and the Document object. Specify the following properties:

- a. **Object Type**- Document
 - b. **Name**- <User preference>
 - c. **Field Type**- Multiple Object
 - d. **Associative Object Type**- <Dynamic Object created in step 2>
 - e. Keep all remaining properties at their default values.
 - f. Click **Save**.
7. Navigate to the **Persistent Highlight Sets** tab in your workspace.
 8. Click **New Persistent Highlight Set**.
 9. Create a new set with the following properties:
 - a. **Name**- <User preference>
 - b. **Order**- <User preference>; this controls the position of this set in the Persistent Highlight Tree in the Viewer.
 - c. **Source**- Highlight Fields
 - d. **Highlight Fields**- <The name of the field created in step 6b.>
 - e. Click **Save**.

4.5.2 Importing terms

To import a CSV or other Relativity-supported load file containing terms, use the following procedure.

1. Open the **Relativity Desktop Client**.
2. Select the workspace you are importing into.
3. Select the Dynamic Object you created above from the object drop-down menu.
4. Select **Tools** from the top menu.
5. Select **Import | <Dynamic Object>** load file.
6. Select your terms load file and corresponding delimiters.
7. Map the field in your load file that contains the terms to the Name field in Relativity. Here you can also import Relativity Highlight Color. You must have this information in the load file contained in a field in the following format: text color; highlight color (for example, 15;9). If you do not have this information in the load file, you can manually enter it for terms in Relativity. Because the latter can be time consuming, we recommend having this information in the load file if possible.
8. Click **Import** to import the terms.
9. Navigate to the object tab you created in step two of the Relativity component setup section.
10. Click on a term.
11. Select the layout you want to use from the drop-down menu.
12. Click the pencil icon to edit the layout.
13. Click **Add Associative Object list**.

14. Use the drop-down menu to select the field you created in 6b of the Relativity component setup section.
15. Set the **View** field to your preferred document view.
16. Set the **Link View** field to your preferred document view.
17. Click **Save**.
18. Click **Link**.
19. Select all documents.
20. Click **Add**.
21. Click **Set**.
22. Repeat steps 10 through 22 on each term.
23. Verify that the terms are highlight through the following:
 - a. Open a document in the workspace.
 - b. Open the Persistent Highlight Tree in the Viewer.
 - c. Note the presence of the newly created Persistent Highlight Set and verify that terms are highlight in the appropriate colors.

4.6 Creating efficient searches for persistent highlighting

Creating efficient searches improves the performance of persistent highlighting, whether you're working with a Terms Search or Highlight Fields. Use the following guidelines to create efficient searches.

4.6.1 Using terms search

Avoid the following when writing searches for persistent highlighting:

The screenshot shows a form titled "Persistent Highlight Set Information". It contains the following elements:

- Name:** A text input field.
- Order:** A text input field.
- Source:** Two radio buttons: "Highlight Fields" (unselected) and "Terms" (selected). A red arrow points to the "Terms" radio button.
- Highlight Fields:** A blue button with three dots "...".
- Terms:** A large text area for entering search terms.

- Do not use "AND" or "OR" connectors. Persistent highlighting looks for the exact phrase, trade and complete, instead of the word, trade, and the word, complete.

- Proximity, fuzziness, and stemming logic cannot be used in a Terms Search. Consider using Highlight Fields to access these search features as described below. The system ignores the dtSearch syntax. Terms receive no highlight if you use these advanced searching features. The search terms report Count column still lists the number of matching terms. For example:
 - The search term, oil w/10 water, searches for the exact phrase oil w/10 water.
 - If you enter the term apply~ as a search term, persistent highlighting technology looks for the term apply followed by any special character.
- Avoid using terms with a large number of hits per document. Persistent highlighting highlights each hit. For example, it takes longer to load a Word document containing 1,000 instances of a single term.
- Avoid using terms that only occur once in a document. Use search terms reports for those terms instead.
- Avoid long lists of numbers, such as Bates numbers or account numbers.
- Do not use duplicate terms.

Use the following techniques to optimize your searches:

- Use the dtSearch Dictionary to identify variations of a term instead of using wildcards.
 - Identify which terms should be in the highlight set and which terms are not necessary.
 - You may want to avoid highlighting terms with high word counts.

Note: To highlight terms using objects, create a fixed-length text field for your object called Highlight Colors. You can enter color-coding in this field using the format: **[highlight color];[text color]**.

4.6.2 Using highlight fields

Consider the following guidelines when creating or adding terms using Search Terms Reports as the highlight fields source:

Persistent Highlight Set Information

Name:

Order:

Source: Highlight Fields Terms

[Manage](#)

Highlight Fields:

Terms:

- Enter terms exactly as they appear in the document.
- Starting with Relativity 9.6.202.10, you can use operators such as AND and OR. For example, if you enter these search terms: Apple AND Banana, Relativity would highlight the two terms "apple" and "banana" in the document. See [Search terms reports on the next page](#) for more information.
- Wildcards are useful in some cases. For example, the search term appl* highlights apple, application, applies, and so on. An excessive use of wildcards affects performance. Leading wildcards such as *itting, are not recommended. Using asterisks in the middle of a term don't count as wildcards.
- Starting with Relativity 9.6.202.10, dtSearch operators can be used to highlight searches when used for a Persistent Highlight Sets in the HTML5 Viewer in Viewer mode. You must use a Highlight Fields source (such as a Search Terms Report results field) to use dtSearch syntax. Relativity dtSearch operators are not supported in the Extracted Text mode of the Viewer or the ActiveX viewer. The highlights for these searches use the active and inactive highlighting functionality. Active highlights are the highlights that the Viewer is focused on and display with full opacity. Inactive highlights display at a lower opacity level.

Note: The increase of dtSearch operators does decrease performance.

- Proximity searching logic can be used with Highlight Fields. If you enter the phrase "Relativity w/5 software" as a search term, the search term report uses a dtSearch to find and tag all documents that meet the criteria. When viewed in the Viewer, the persistent highlighting functions as a dtSearch. See [Search terms reports on the next page](#) for information.
- Stemming, including the stemming character (~), can also be used with Highlight Fields. If you enter the term "apply~" as a search term, the search term report finds and tags all documents with the word apply, or any document that stems from apply; including applied, applies, application, and so on. When looking at the document in the Viewer, the persistent highlight functions as a dtSearch. See [Search terms reports on the next page](#) for information.
- Use the dtSearch Dictionary to identify variations of a term instead of using wildcards.
 - Identify which terms should be in the highlight set and which terms are not necessary.
 - You may want to avoid highlighting terms with high word counts.

5 Search terms reports

Search terms reports provide the ability to identify documents containing specific keywords or terms. You can enter multiple terms and generate a report listing the number of hits for each term in a document. You can determine the output of the report by selecting one of the following type options:

- **Report Only** - Creates a report that includes the number of hits for each term or phrase. A hit indicates one or more uses of the term or phrase in a document.
- **Report and Tag** - Creates a report that includes the number of hits for each term or phrase in addition to the following:
 - Saves the results to a multiple object field named after the search terms report with the prefix STR so that the results can be reviewed later.
 - Tags the documents using the multiple object field with the search term(s) found.

You can also use the reports created with the report and tag option in your persistent highlight sets. When you select a search terms report for use with a persistent highlight set, the report determines which terms or phrases to highlight in the documents through the core reviewer interface.

Also see this related recipe:

- [Searching for a document set using control numbers](#)

Using search terms reports

You're a system admin at a law firm and one of your clients, a construction company, is involved in litigation regarding the use of materials that they weren't informed were potentially environmentally damaging when they purchased them from a major supplier.

There are roughly three million files related to this case, including emails, email attachments, invoices, and technical manuals related to construction practices and material handling.

Before you begin review, you want a report that tells you how many times the names of toxic substances appear in the documents. To get this, you create a new search terms report. You give it a name consistent with other objects you've created for this case, "Hazardous Materials search terms report." For the Index field, you select the dtSearch index you already created for your reviewers. Since you don't need to actually tag the documents that contain the terms you want to include, you select the Report Only option for the Type field. For the Searchable Set field, you select the set of documents you specified when you created the saved search for the dtSearch index data source. Finally, in the Add Terms field, you enter the substances you want reported on, which are the same ones included in your client's lawsuit and the same ones for which you've already created choices for an issue coding field. These terms are:

- lead
- asbestos
- asphalt
- radioactive isotopes

The screenshot shows a web application interface for configuring a 'Search Terms Report'. The top navigation bar includes 'Documents', 'Review Batches', 'Reporting', 'Audit', 'Case Admin', 'Job Admin', and 'Workspace Admin'. Below this, there are tabs for 'Search Terms Reports', 'Summary Reports', 'Pivot Profiles', and 'Domain'. The main content area is titled 'Report Information' and contains several configuration options:

- Name:** A text input field containing 'Hazardous Materials STR'.
- Index:** A dropdown menu showing 'dtSearch' with a blue ellipsis button to its right.
- Searchable set:** A dropdown menu showing 'Extracted Text Only' with a blue ellipsis button and a 'Clear' button to its right.
- Type:** Radio buttons for 'Report and tag' (unselected) and 'Report only' (selected).
- Calculate unique hits:** Radio buttons for 'Yes' (unselected) and 'No' (selected).
- Include relational group:** A dropdown menu showing 'Select...' with a blue ellipsis button to its right.
- Email Notification Recipients:** A large empty text area.
- Notes:** A large empty text area.

At the top of the configuration area, there are buttons for 'Save', 'Save and New', 'Save and Back', and 'Cancel'.

You save and run the report. The results tell you how prevalent these terms are in the data set. You now have a better idea of what lies ahead.

5.1 Permissions to use search terms reports

To configure permissions for Search terms reports:

1. Navigate to the **Relativity Utilities** console on the **Workspace Details** tab.
2. Click **Manage Workspace Permissions**.
3. Click **Edit Permissions** for a group on the **Group Management** tab.
4. Grant access to the workspace security permissions listed in the table.

Object Security	Tab Visibility	Admin Operations
Search Terms Reports - View, Edit, Delete, Add	Reporting > Search Terms Reports	N/A
Search Terms Results - View, Edit, Delete, Add	Reporting > Search Terms Results	

5.2 Guidelines for using search terms reports

Use the following guidelines to ensure that your search terms report properly highlights the required terms:

- Define a saved search using conditions that return the required group of documents for the **Searchable Set**. Persistent highlighting applies only to documents in the searchable set. Relativity also only counts hits that fall within the searchable set. Related items not included in the searchable set will not be searched for search terms.
- Confirm that your dtSearch index includes all documents in the **Searchable Set** of the search terms report.
- Select **Report and Tag** in the **Type** radio button list for the report. If you don't select this option, then a multiple object field isn't created for the search terms report. If this field isn't created you can't select it in the **Highlight Fields** option when creating a persistent highlights set. See [Persistent highlight sets on page 44](#).
- When using a search terms report as a highlight source in a persistent highlight set, only the terms in documents associated with the current reports appear highlighted. If you add new search terms to the reports, you must run pending terms so that they appear highlighted in documents.

5.3 Creating a search terms report

To create a new search terms report, follow these steps:

1. Navigate to the **Reporting** tab.
The Search Terms Reports tab opens by default.
2. Click **New Search Terms Report**.
3. Complete the fields on the form. See [Fields below](#).
4. Click **Save**.

After saving the search terms report, the Search Terms Report Status section and Search Terms Report console appear. As the status section indicates, you must add terms to your new report. See [Adding or editing terms and highlight colors on the next page](#).

5.3.1 Fields

Search terms reports contain the following fields:

- **Name** - the search terms report's name. This value can't exceed 75 characters.
- **Index** - the dtSearch index used to create the report.
- **Searchable set** - a saved search that includes the set of documents used to create the report.

Note: If you are using this search terms report for a persistent highlight set, the saved search used for the searchable set cannot have a condition referencing another search terms report.

- **Type** - select one of the following options:
 - **Report and tag** - creates a report that includes the number of hits for each term or phrase in addition to the following:
 - Saves the results to a multiple object field named after the search terms report with the prefix STR (e.g. STR - Industry terms) so that the results can be reviewed later.
 - Tags each document containing search hits using the STR multiple object field with the search term(s) found in each document.
 - **Report only** - creates a report that includes the number of hits for each term or phrase.
- **Calculate unique hits** - if set to Yes, this setting includes a Unique hits value for each term in the search terms results. Unique hits is the count of documents in the searchable set returned by only that particular term. If more than one term returns a particular document, that document is not counted as a unique hit. Unique hits reflect the total number of documents returned by a particular term and only that particular term.

Note: Unique hits can help you identify terms in your search terms report that may be overly inclusive.

- **Include relational group** - includes the "Documents with hits, including group" counts for each term in the search terms results. This value counts the documents with hits for each term as well as all documents in the same relational group as the documents with hits. Include relational group only includes hits of related items in the searchable set. Relativity doesn't look outside of the searchable set. Click the ellipsis and select a relational group to include.
- **Email notification recipients** - specifies recipients to send an email notification to when your search terms report finishes running. Enter the email address(es) of the recipient(s). Separate entries with a semicolon.

5.3.2 Adding or editing terms and highlight colors

To add or edit terms for your search terms report:

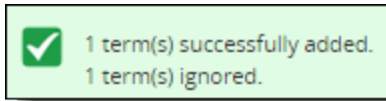
Note: You must create a persistent highlight set for highlighted terms to appear in your documents. See [Persistent highlight sets](#) for more information.

1. Click the name of your Search terms report.
2. Click **Modify Terms** from the Search Terms Report console.
The Search Terms report window opens.
3. Enter your terms in the text box under the New Terms heading so that each term appears on a separate line.
Alternatively, you can also click the **Dictionary** link to display the Dictionary Search pop-up. In the pop-up you can perform searches using fuzziness, proximity, and stemming. Click **Copy to List** to add the Dictionary search results to the New Terms text box.

Note: Each line is treated as an individual dtSearch query. For more information about dtSearch, refer to the Searching Guide .

4. Click **Add Terms** to move your new terms to the existing terms list.

A single term has a character limit of 450. A confirmation message displays with the count of new terms added and duplicate terms ignored.



5. (Optional) Select the checkbox next to the term(s) and select the background color and text color using the drop-down menus. See the preview text to verify that the resulting highlighted text is readable. Click **Apply Color**.

Note: By default, highlighted terms appear as black text with a magenta background.

6. Click **Done**.

After adding new search terms to an existing report, you must run the terms so that they appear highlighted in documents. See [Running a search terms report below](#) for details.

5.3.3 Deleting terms

To remove terms from the search terms report:

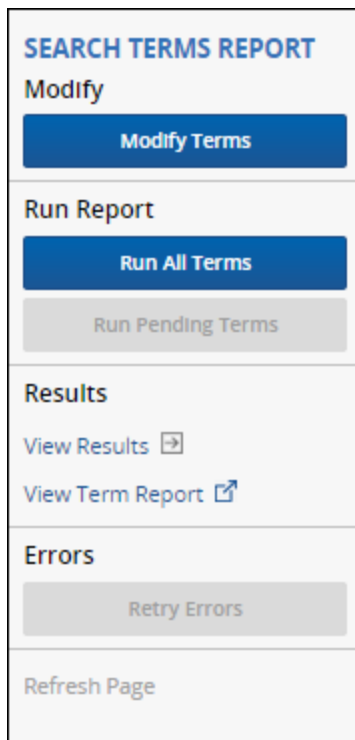
1. Click **Modify Terms**.
2. Select the checkbox next to the term(s) you want to remove under Existing Terms.
3. Click **Delete**.
4. Click **Done**.

If you remove search terms from the reports, the terms automatically disappear from the search terms report results. You must run the report again for accurate totals in the status bar and when using View Term Report.

5.4 Running a search terms report

You generate a search terms report by using the options available in the search terms report console. The console appears after you save a search terms report or when you open an existing report from the Search Terms Report tab.

The console includes the following options:



- **Modify Terms** - opens the terms management screen. On this screen, you can add new terms to the report, apply text and background highlight colors, and delete existing terms from the report.
- **Run All Terms** - generates counts for each term. Use this option when generating the report for the first time or if you want to regenerate counts for all terms in the report. Run all terms after adding new documents to the searchable set.
- **Run Pending Terms** - updates an existing report. It runs a report on only those terms with a Pending status.
- **View Results** - opens the Search Terms Results page. This page displays the report results, listing the number of document hits for each term. Navigate back to the search terms report console for the report you are viewing by clicking on the object name in the search panel filter card. The Search Terms Results page provides the following:
 - **Name** - search term included in search terms report.
 - **Documents with hits** - the number of documents in the searchable set that contain the search term.

Note: Documents with hits is not security-aware or influenced by permissions. This means that it includes documents the user can't view in a basic search. For example, a user could perform a dtSearch that returns a total of five documents, including two inaccessible documents. Even though the user can only view three documents, the search terms count still includes all five documents originally tagged with the search term.

- **Documents with hits, including group** - counts the documents with hits for each term as well as all documents in the same relational group as the documents with hits. The count only

includes hits of related items in the searchable set. It will not look outside of the searchable set.

- **Unique hits** - counts the number of documents in the searchable set returned by only that particular term. If more than one term returns a particular document, that document is not counted as a unique hit. Unique hits reflect the total number of documents returned by a particular term and only that particular term.
- **Last run time** - timestamp when the search terms report last ran.
- In this page, you can also access a list of any terms that failed during the creation of the Search Terms Report. To read these error messages, change your view to **Search Terms Results Details**.
- **View Term Report** - In the Search Terms Report console, click **View Term Report** to open the graphical search terms report. You can print or save the report. To save, select a file type at the top of the report.
- **Retry Errors** - attempts to regenerate the report for search terms that returned error messages.
- **Refresh Page** - updates the information displayed on the page.

5.4.1 Search terms report status

After running a search terms report, the search terms report status section appears. It lists the search terms report name and status. The status indicates the current progress of the report. This field contains either Searching your terms, Completed, or Error.

Search Terms Report

Status: ✔ Completed

Document Breakdown	Information
Total with Hits: 1,760	Number of terms: 3
Total with Hits + Family: 2,461	In Searchable Set: 2,501

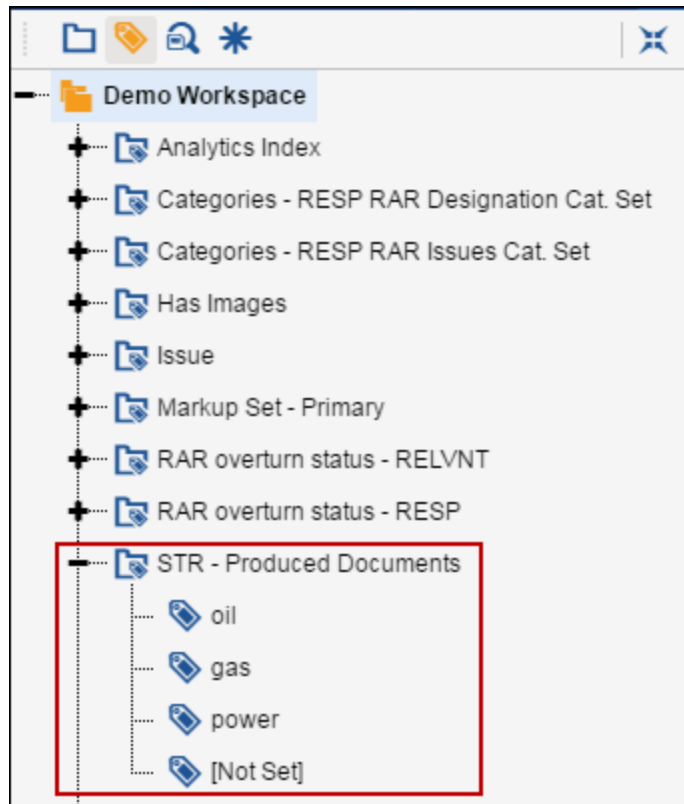
This section also provides a summary of the search terms report and its results:

- **Number of terms** - total number of terms run in the search terms report.
- **Documents in searchable set** - total documents in the designated searchable set.
- **Total documents with hits** - the number of documents in the searchable set that contain the search term.
- **Total documents with hits, including <relational group name>** - counts the documents with hits for each term as well as all documents in the same relational group as the documents with hits.

5.5 Accessing tagged documents using the Field Tree browser

After you run a search terms report with the **Report and Tag** option enabled, Relativity creates a folder in the Field Tree browser with documents grouped by tags found by the search terms report. The folder is named after the STR multiple object field created by the search terms report. For example, if your STR is named *Produced Documents*, the folder in the Field Tree browser is named *STR - Produced Documents*.

Click a search term tag in the Field Tree browser to view documents in your searchable set tagged with the selected term. You can also email a link to the tagged documents by right-clicking the tag results and selecting **Email Link**.





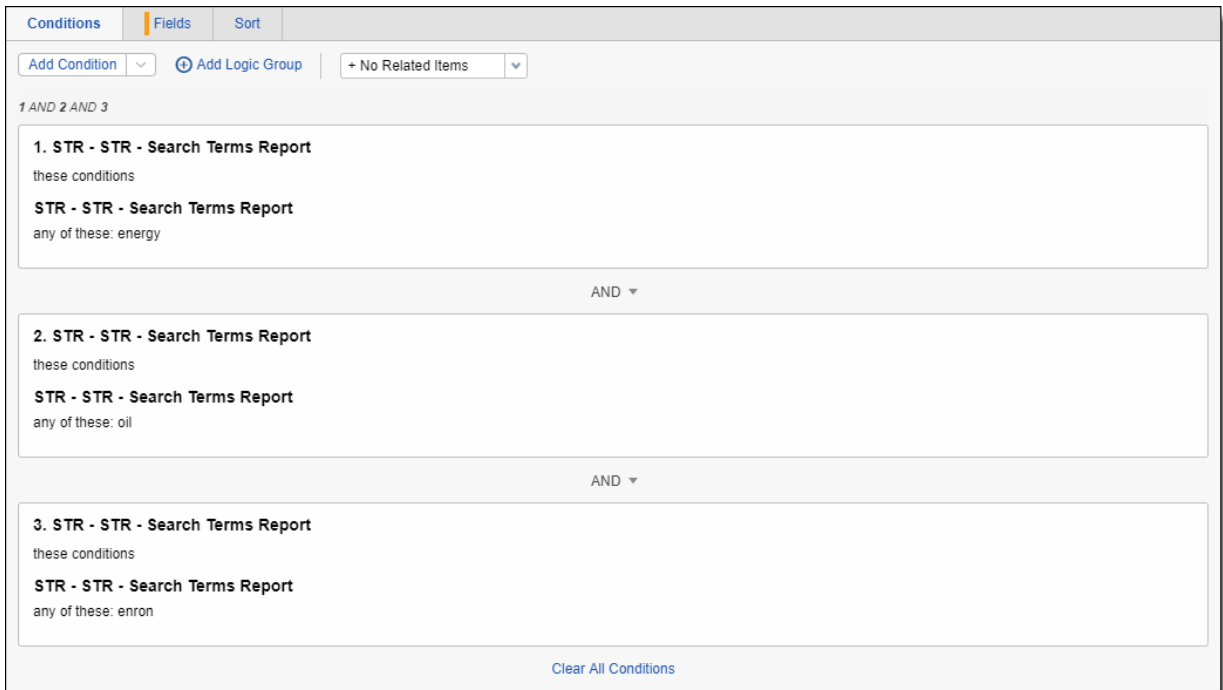
5.6 Using tagged search terms in a saved search

After you run a search terms report with the **Report and Tag** option enabled, Relativity creates choices for each of the terms that you specified. You can then use these choices as criteria in a saved search.

Use this procedure to create a saved search using tagged search terms:

1. Follow the instructions for setting fields in the Information and Search Conditions sections on a saved search.
2. Select your search terms report in the Field box and select a condition in the Operator box in the Conditions section.

3. Click  to display the Select STR dialog in the Value field.
4. Perform the following tasks on the Select STR dialog:
 - a. Select your search terms report in the Field box.
 - b. Select an Operator, such as *any of these*.
 - c. Click  to select search terms on the Select Items dialog.
 - d. Set any other fields as necessary.
5. Click **OK**. If you added the tagged search terms called energy, oil, and enron, the Conditions section would appear as follows:



6. Repeat steps 1 to 3 for each tagged search terms.
7. Click **Search** to run your query.

6 Searching overview

Relativity includes flexible search features designed to facilitate the document review process. These easily accessible features support a range of searching needs from filtering on fields and simple keyword searches to the development of complex queries. The following list summarizes the searching features available in Relativity.

Filters

You can use filters to limit the documents or items that appear in item lists on Relativity tabs and pop-ups. When you enable the filters for an item list, you can set criteria on single or multiple fields so that only matching documents or items appear in the view. Filters query across the searchable set of documents in the active view to return your results. Relativity supports multiple filter types so that you can easily choose the best format for different field types. See the Searching Guide for more information.

Keyword searches

You can run keyword searches from the Documents tab and from Dynamic Object tabs. With these searches, you can leverage the basic functionality for querying the SQL full-text index populated with data from extracted text fields. The keyword search engine supports the use of Boolean operators and wildcards. As the default search engine in Relativity, keyword search automatically populates with extracted text during data import. See the Searching Guide for more information.

Saved searches

These searches provide you with the functionality to define and store queries for repeated use. With flexible settings, you can create a saved search based on any Relativity search engine, assign security permissions to it, and define specific columns to display your search results. Saved searches support the development of complex queries that you build using a form with search condition options. These queries run dynamically to ensure that updated results appear when you access a saved search. See the Searching Guide for more information.

dtSearches

Available on the Documents tab, you can use the advanced searching functionality to run queries with proximity, stemming, and fuzziness operators, as well as with basic features such as Boolean operators and wildcards. System admins can create a dtSearch index for a specific subset of documents in a workspace, and then assign security to it. They must manually update indexes when the document search sets used to create them are modified. See the Searching Guide for more information.

Analytics

Supporting conceptual searching, Analytics includes documents in a result set when they contain similar ideas or conceptual relationships, rather than matching specific search terms or conditions. You can create searches with Analytics that categorize your documents based on the concepts contained in a sample document set. Instead of categorizing documents, you can also perform clustering, which uses specific algorithms (system-defined rules) to identify conceptually related documents. See the Searching Guide for more information.


Regular expressions

Regular Expressions (RegEx) is a form of advanced searching that looks for specific patterns, as opposed to certain terms and phrases. With RegEx you can use pattern matching to search for particular strings of characters rather than constructing multiple, literal search queries. You can use RegEx with a dtSearch index using dtSearch syntax options to construct complex queries. See the Searching Guide for more information.

Additional features

Relativity provides additional features that make searching easily accessible from the Documents tab. Use the **search bar** to run a keyword search query, or click the drop-down to select another search index you created.



With the **search condition** option, you can build queries using the same condition options available for saved searches. You can click **Save as Search**  on the Documents tab to create saved searches based on the criteria defined for keyword searches, dtSearches, Analytics, or the search conditions option. See the Searching Guide for more information.

6.1 Search conditions

You can use the search conditions option to build complex queries by selecting fields, operators, and values. While this feature has the same functionality as the search condition section of the saved search form, it's conveniently available from the Documents tab and Relativity Dynamic Object tabs. This option displays up to five rows, with each row representing a separate criterion. Depending on the type of field you select, different operators appear. You can use this option alone or in conjunction with keyword searches, dtSearches, Analytics, or Cluster visualization. When you use search options in conjunction with another search feature, documents must both meet the search criteria and also the conditions specified.

Note: To use the search conditions option, you must have add or edit permissions for **Search** and access to the **Saved Searches Browser** assigned to you through the Security page. See Workspace security in the Admin Guide.

6.1.1 Setting up search conditions

6.1.1.1 Setting up search conditions in the Search panel


To set up search conditions in the Search panel follow these steps:

1. Navigate to the Search Builder.
2. Click **Add Condition** and select the fields to which you want to apply conditions.
A pop-up window opens for each condition field you select.
3. Set the required conditions in the relevant field pop-up window.
4. Click **Apply**.
5. (Optional) Click **Add Logic Group** to add a logic group. Logic groups are evaluated first, and then connected to other filter conditions or logic groups using AND / OR operators.
6. (Optional) Drag and drop conditions together to create logic groups.
7. (Optional) Add the AND or OR operators to connect the criterion.
8. Click **Apply**.

If you need to edit the condition, click on the condition card. The pop-up reopens so you can make changes.

6.1.1.2 Setting up search conditions in the Search browser

To set up search conditions in the Search browser, follow these steps:

1. Click  to navigate to the Search Browser.
2. Click **New Search**.
3. Click **Add Condition** and select the fields to which you want to apply conditions.
A pop-up window opens for each condition field you select.
4. Set the required conditions in the relevant field pop-up window.
5. Click **Apply**.
6. (Optional) Click **Add Logic Group** to add a logic group and drag and drop your conditions into the frames. Logic groups are evaluated first and then connected to other filter conditions or logic groups using AND / OR operators.
7. (Optional) Add the **AND** or **OR** operators to connect the criterion.
8. Enter all required fields.
9. Click **Save** or **Save As**.

If you need to edit the condition, click on the condition card. The pop-up reopens so you can make changes.

6.1.1.3 Using the multiple object condition builder

You can set conditions for **multiple object fields** from a single pop-up window. The following example uses Batch as a multiple object field condition.

To use the multi-object condition builder, follow these steps:

1. Click **Add Condition** from the Search browser or Search panel.
2. Enter or select **Batch**.
The Condition: Batch window opens.
3. Select the desired operator from the **Operator** drop-down. For example, **these conditions**.
4. Click **Add Condition**.
5. Select the condition from the **Add Condition** drop-down. For example, **Batch:: Batch Set**.
6. Click the available fields from the **Available** column and move them to the **Selected** column as desired.
7. Click **Apply**.
8. (Optional) Click **Add Logic Group** to add a logic group. Logic groups are evaluated first and then connected to other filter conditions or logic groups using AND / OR operators.
9. (Optional) Drag and drop conditions into logic groups as desired.

10. Click **Apply** on the Condition: Batch window.

Relativity applies your search conditions.

For more information about multiple object searching logic, see [Multiple object searching](#).

6.1.2 Canceling queries

You can cancel a long-running search or view by clicking the **Cancel** button. This link appears when you perform a keyword search, dtSearch, Analytics search, or use Pivot. It also appears when you filter or sort a document or Dynamic Object list. It also appears when you perform other actions on item lists containing documents or Dynamic Objects that initiate a query in the background.

When you click **Cancel Request**, Relativity stops the background query used to populate documents in an item list. If you edit a search and click this link, your changes save, but the item list doesn't load. For example, your changes save when you perform a mass edit on a list of documents in a search and then click **Cancel Request** when the query is running to redisplay the updated list.

Note: Relativity creates an audit record in the History tab for canceled queries. The query description displays the running time of the query and indicates that it was canceled. You must have the appropriate permissions to view this tab.

The following table explains different scenarios in which you might cancel a running query and whether the query actually cancels.

Scenario	Result
You start a query and click Cancel Request or Cancel .	The query is canceled.
You start a query and close the browser.	The query is canceled.
You start a query and an system admin resets the IIS on the server.	The query is not canceled.
You start a query and leave your browser idle for longer than the session timeout specified in Relativity web.config, regardless of whether you clicked OK or Cancel on the message from the webpage pop-up.	The query is not canceled.
You start a query and click Cancel on the message from the webpage pop-up within the session timeout specified in Relativity web.config.	The query is canceled.
You start a query and click OK on the message from webpage pop-up within the session timeout specified in Relativity web.config.	The query continues to run. Relativity returns you back to the waiting screen (see the first row of this table).
You start a query and paste a different URL into your browser, or you refresh the page.	The query is canceled.

6.1.3 Frequently asked searching questions

This section includes frequently asked questions from Relativity users.

6.1.3.1 Multiple terms in dtSearch queries

Why would I receive an error message saying my query is too complex?

Relativity can't return precise results when a query includes search conditions that are too complex due to the use of multiple search terms. To avoid this error message, simplify your search criteria. For example, search for 10 instead of 50 terms in your query. You can save and tag your search results from each simpler query. With this approach you can search on the required terms, while providing better results.

6.1.3.2 Proximity searches in dtSearch queries

Why are terms in my proximity search highlighted even when they don't match my defined W/N criteria?

Relativity highlights terms that meet the requirements of your proximity search as well as the individual search terms. This behavior doesn't affect the results of your proximity search, which returns the appropriate documents. For example, the results of a proximity search for instances of law within three words of order (that is "law W/3 order") includes highlighted terms of "law" and "order" when they aren't within three words of each other. To accommodate this behavior, focus only on the results that match the proximity search criteria, and disregard the other highlighted terms.

6.1.3.3 Using reserved characters in dtSearch queries

Can I use a reserved character such as ampersand (&) in my dtSearch queries?

The following characters have special meaning in dtSearch, and must be treated with care when they appear in your queries: ?, *, %, ~, #, =, :, &, (). Use the dictionary to explore syntax options if necessary.

If you want to make any of these characters searchable, you must add them to the alphabet file and, in some cases, use Regular Expressions in your search. For more information, see the Searching Guide.

6.1.3.4 Multiple conditions

Why do my searches run slowly when I use multiple conditions?

When you add multiple search conditions to a query, Relativity searches on these conditions relative to each other, which slows down the return of your results. For example, you experience slow performance when running a query on all email messages received "after June 1" and "before June 30" of the same year. You can improve performance by using as few conditions as possible, such as excluding the condition "before June 30". Run the query with only the condition "after June 1", and then sort or filter your results to display messages received between the desired dates.

6.1.3.5 Nesting searches

Can I nest multiple searches in a saved search?

For performance reasons, we don't recommend nesting multiple searches in a saved search. You can select a search as a condition, but using multiple searches as conditions slows down the return of your results. See the Searching guide for more information.

7 Summary reports

Summary reports provide aggregate tallies of field values. Field types available for reporting are limited to the following:

- Multiple-choice list
- Single-choice list
- User
- Yes/No

The reports are based on an optional grouping criterion (the vertical axis) and the fields to be tallied (the horizontal axis).

For example, you can create a summary report with the grouping criterion custodian, where the field to be tallied is responsiveness. The report shows the number of documents that have been tagged with each responsiveness value per custodian.

Using summary reports

Imagine you're a system admin, and the review manager for your firm requests metrics on the job performances of reviewers. You want to be able to track the effectiveness of each reviewer by retrieving information about how many documents he or she reviews per day along with how many they code as responsive, not responsive, or unsure.

You create a summary report that lists the number of documents reviewed by the reviewers and export the report to excel to pass on to the manager.


7.1 Creating and editing a summary report

To create a summary report, follow these steps:

1. Click the **Summary Reports** tab.
2. Click **New Summary Report**, or if you're editing an existing summary report, click **Edit**.
3. Complete the fields on the form. See [Fields below](#).
4. Click **Save**.

7.2 Fields

- **Folders** - located in the browser to the left of the form. You can specify the scope of the report using folders. You can report on the entire case workspace or only on specific folders and subfolders.
- **Name** - the title of the summary report.
- **Group By** - an optional field where you can select a grouping criterion for the report. Grouping criteria appear as rows on the report.

- Leave the group by field blank to display only a summary with no grouping.
- Click  to select your grouping condition.

Note: You can use filters to quickly find your field.

- **Report on subfolders** - a yes/no field that reports on a single folder or a folder and its subfolders. Defaults to Yes, which reports on folders and their subfolders.
- **Columns** - select which fields are tallied. Selected fields display as columns on the report.
 - **Add Columns** - add columns to the report. Click **Add Columns** and select the checkbox for each field you want to tally. You can use filters to quickly find the desired fields. Only multi-choice list, single-choice list, user, and yes/no fields can be reported on.
 - **Remove selected columns** - remove fields from your columns section.

8 Tabs

A workspace contains tabs that provide you with easy access to different Relativity features, including documents, search terms reports, views, and other default functionality. Relativity is a highly customizable platform. You can apply any template with a tabs arrangement that best serves your review needs. Some workspace templates also include custom tabs for specialized functionality.

You can add custom tabs in workspaces or at Home. Users with admin rights also have access to a Tabs tab from Home. The functionality of this Tabs tab is the same as the Tabs tab in a workspace.

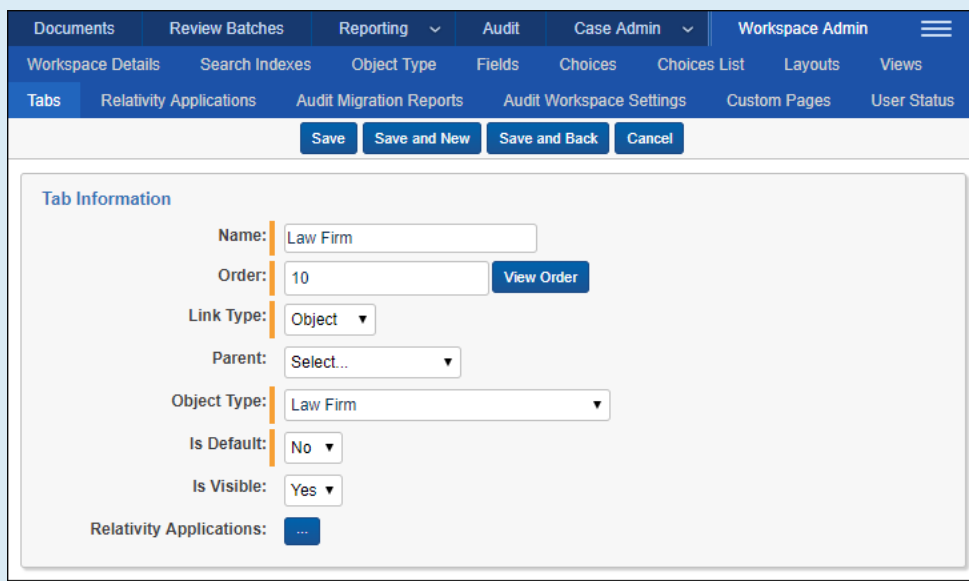
In addition, Relativity automatically creates a tab when you add a new object type. If you are developing a custom application, you may want to obtain the globally unique identifier (GUID) for a tab. For information about obtaining GUIDs, see Basic concepts for the application framework on the Relativity 10 Developers site.

Using tabs

You're a system admin facilitating a document review project involving thousands of patients whose private personal health information was stolen during a security breach.

You're in the process of creating an application for tracking the many attorneys associated with this litigation. You want to add to this application a list of all the law firms where these attorneys work to go along with the master list of attorney names you've already created.

To do this, you want to create a new tab to hold the names of these law firms. You go to the Tabs tab and create a new tab with a name of Law Firms and an order of 10. You keep the Link Type field at its default value of Object. For the Object Type field, you select the Law Firm, which you just created as one of the several objects that will make up the application you're creating.



The screenshot shows the 'Workspace Admin' interface with the 'Tabs' tab selected. The 'Tab Information' form is displayed with the following fields and values:

- Name: Law Firm
- Order: 10 (with a 'View Order' button)
- Link Type: Object
- Parent: Select...
- Object Type: Law Firm
- Is Default: No
- Is Visible: Yes
- Relativity Applications: ...

Buttons at the top of the form include 'Save', 'Save and New', 'Save and Back', and 'Cancel'.

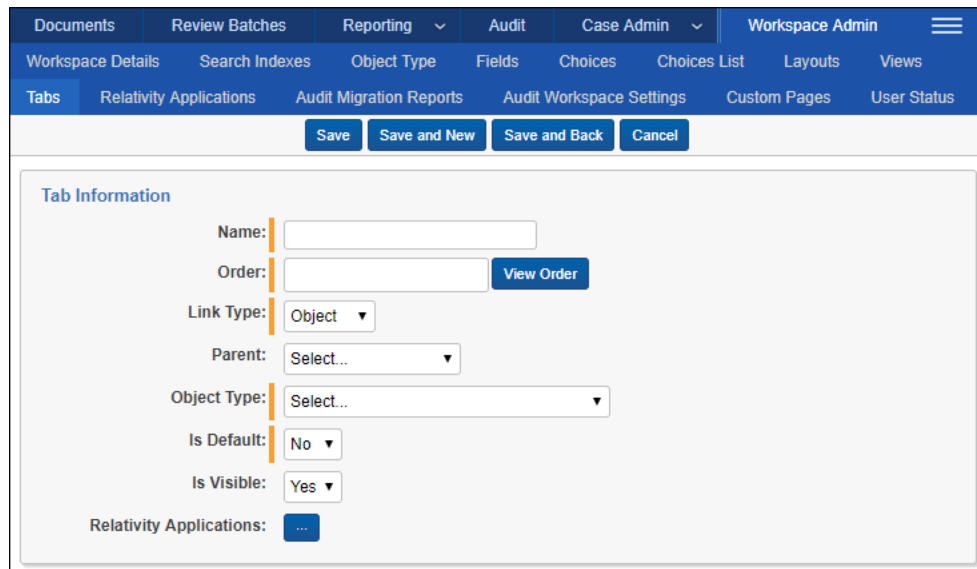
Once you save the Law Firms tab, you can now populate it with the names of firms that employ the many attorneys involved in your case.

8.1 Creating and editing tabs

To create or edit a tab, follow these steps:

1. Click the **Tabs** tab.
2. Click **New Tab**. If you're editing an existing tab, click **Edit**.
3. Complete the fields on the form. See [Fields below](#).
4. Click **Save**.

8.2 Fields



The screenshot shows the 'Workspace Admin' interface with the 'Tabs' tab selected. The 'Tab Information' form contains the following fields:

- Name:** A text input field.
- Order:** A text input field with a 'View Order' button to its right.
- Link Type:** A dropdown menu with 'Object' selected.
- Parent:** A dropdown menu with 'Select...' selected.
- Object Type:** A dropdown menu with 'Select...' selected.
- Is Default:** A dropdown menu with 'No' selected.
- Is Visible:** A dropdown menu with 'Yes' selected.
- Relativity Applications:** A button with three dots.

At the top of the form, there are four buttons: 'Save', 'Save and New', 'Save and Back', and 'Cancel'.

- **Name** - the tab's name. This field must be between 1 and 50 characters. Be as concise as possible when naming tabs.
- **Order** - represents the position of the tab by a numerical value. It can be any positive or negative integer. You cannot use decimals in this field. The lowest-numbered tab is the leftmost tab. The highest-numbered tab is the rightmost tab. Items that share the same value are sorted in alphanumeric order.

Note: It's always a good idea to set tab order by 10's, starting with 10, then 20, then 30, etc. By numbering in groups of 10 you can insert an item into any position later in the workspace, without the need to reorder (for example, you can use 10, 20, 25, 30, 40 to insert a new tab between 20 and 30).

- **View Order** - displays a list of active tabs and their current order when you click View Order.

- **Link Type** - determines the type of tab you want to create:
 - **Object** - creates a tab for a non-document object in your workspace.
 - **External** - link to any URL or object type in Relativity.

Notes:

- Selecting **External** from the **Link Type** menu causes the **Link** field to appear below the **Parent** field. In the **Link** field, you can enter a web address to link to a URL.
- Allowed external domains can be whitelisted via the DomainNameWhiteListUrls instance setting.


You can create a link from a tab to an Relativity Dynamic Object (RDO) or a script, using either an Artifact ID or GUID. To create links to other objects, you must use their GUIDs. For information about working with objects that don't have GUIDs, see [Assigning a GUID to an object on the next page](#).

Use the following token to link to an object: **ObjectArtifactIdentifier=[identifier]**, where [identifier] is the GUID of the object, or in the case of RDOs and scripts, the GUID or Artifact ID. For example, you would use the format **ObjectArtifactIdentifier=736b1c1f-d22f-43cf-9094-cc8acf94c60** to create a link from a tab to the object with this GUID.

Use the following case insensitive text replacement options to customize the URL, allowing you to display current details about your workspace:

Text Replacement Option	Replacement Text
%AppID%	AppID=<Current Workspace ID>
%ApplicationPath%	The actual application path
%ArtifactTypeID%	ArtifactTypeID=<Current ArtifactTypeID>
%AssociatedArtifactID%	AssociatedArtifactID=<Current Instance Artifact ID>
%AuthenticationToken%	AuthenticationToken=<New Authentication Token>
%ConnectorfieldArtifactID%	ConnectorFieldArtifactID=<Current Connector Field Artifact ID>
%ParentArtifactID%	ParentArtifactID=<Current Parent ArtifactID>
%SystemID%	SystemID=<Current System ID>
%SelectedSearchArtifactID%	SelectedSearchArtifactID =<Current Search Artifact ID>

- **Parent** - establishes the tab as a parent tab. Existing tabs can then be set as children of the parent tab, thereby creating a drop-down tab structure. Selecting this changes the layout by hiding the Parent, Object Type, and Is Default fields and bringing up the required **Tab Display** field.
- **Parent** - the tab is placed as a child tab in the drop-down list of any parent tab.
- **Object Type** - determines which object's information is displayed in the tab for those specified as **Link Type = Object**.

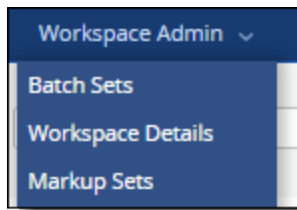
- **Is Default** - the tab serves as the workspace's default tab. Reviewers logging in to the workspace are taken to the default tab. If a reviewer does not have access to the default tab, he or she is directed to the Documents tab.
- **Is Visible** - select this tab from the tab menu.
- **Relativity Applications** - add this tab to a Relativity application. Clicking  brings up a list of available applications.

8.3 Nesting tabs

You may prefer to nest several tabs within a parent to reduce clutter in your Relativity interface and make tabs easier to locate. You must first specify a tab as a parent (step 1) and then specify children tabs (steps 2-4).

1. Create a new tab with a **Link Type** of **Parent** or edit an existing tab.
2. Click the **Edit** link next to the tab you want to nest.
3. Choose the parent tab name under the **Parent** drop-down menu.
4. Click **Save**.

Repeat for each tab you wish to nest. Nested tabs reside in the drop-down menu of the parent. The tab disappears from the tab strip and reside below the new tab.



8.4 Assigning a GUID to an object

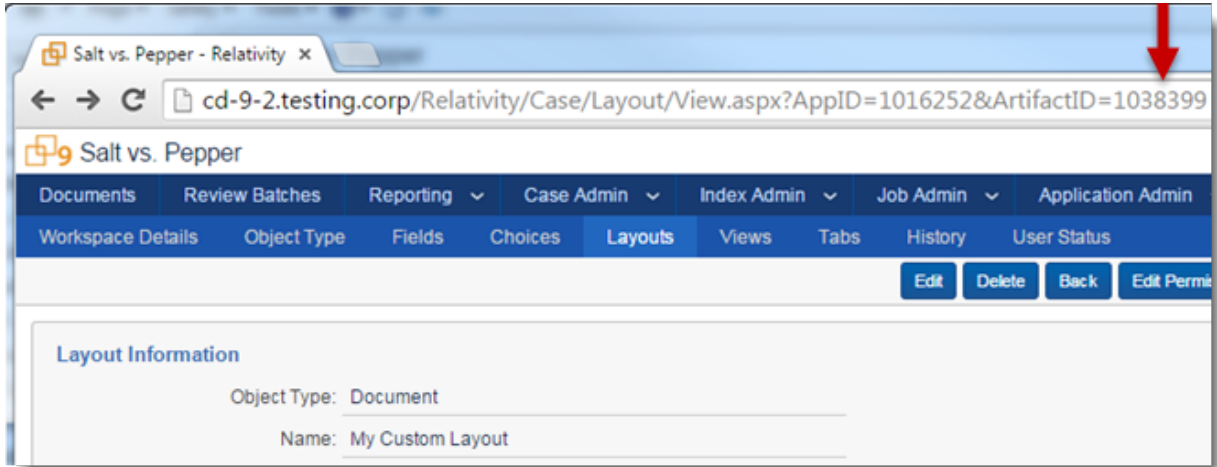
You need to assign a GUID to a Relativity object that only has an Artifact ID, before you can link a tab to it. To assign a GUID to an object, you run a SQL script on database for the workspace where the object resides. This script adds this identifier to the record for the object on the Artifact.Guid table in the database.

You need to complete this assignment process for all Relativity objects except for the following cases:

- **RDOs and scripts** - you can link these objects to tabs using their Artifact IDs or GUIDs, if available. See [Creating and editing tabs on page 77](#).
- **Objects in applications** - Relativity automatically assigns GUIDs to objects added to applications. For information about obtaining their GUIDs, see [Viewing component GUIDs on the Relativity 10 Developers site](#). For information about obtaining their GUIDs, see [Viewing component GUIDs on the Relativity 10 Developers site](#).

Use the following procedure to assign a GUID to an object:

1. Obtain the Artifact ID for an object from the URL used to access it, or by adding the Artifact ID field to the list view for the object in Relativity.



2. Log in to your database server. You must be a database admin.
3. Locate the workspace database for the object that requires a GUID.
4. Execute the following SQL script on the workspace database for the object:


```
DECLARE @artifactID int = 0 -- Your artifact that is missing a GUID.  
IF NOT EXISTS (SELECT 1 FROM EDDSDBO.[ArtifactGuid] WHERE ArtifactID = @artifactID)  
BEGIN  
    INSERT INTO EDDSDBO.[ArtifactGuid] VALUES (@artifactID, NEWID())  
END  
SELECT [ArtifactGuid] FROM EDDSDBO.[ArtifactGuid] WHERE ArtifactID = @artifactID
```

5. Assign the GUID added to the database to the ObjectArtifactIdentifier token to link a tab to the object. See [Creating and editing tabs on page 77](#).

9 Viewer

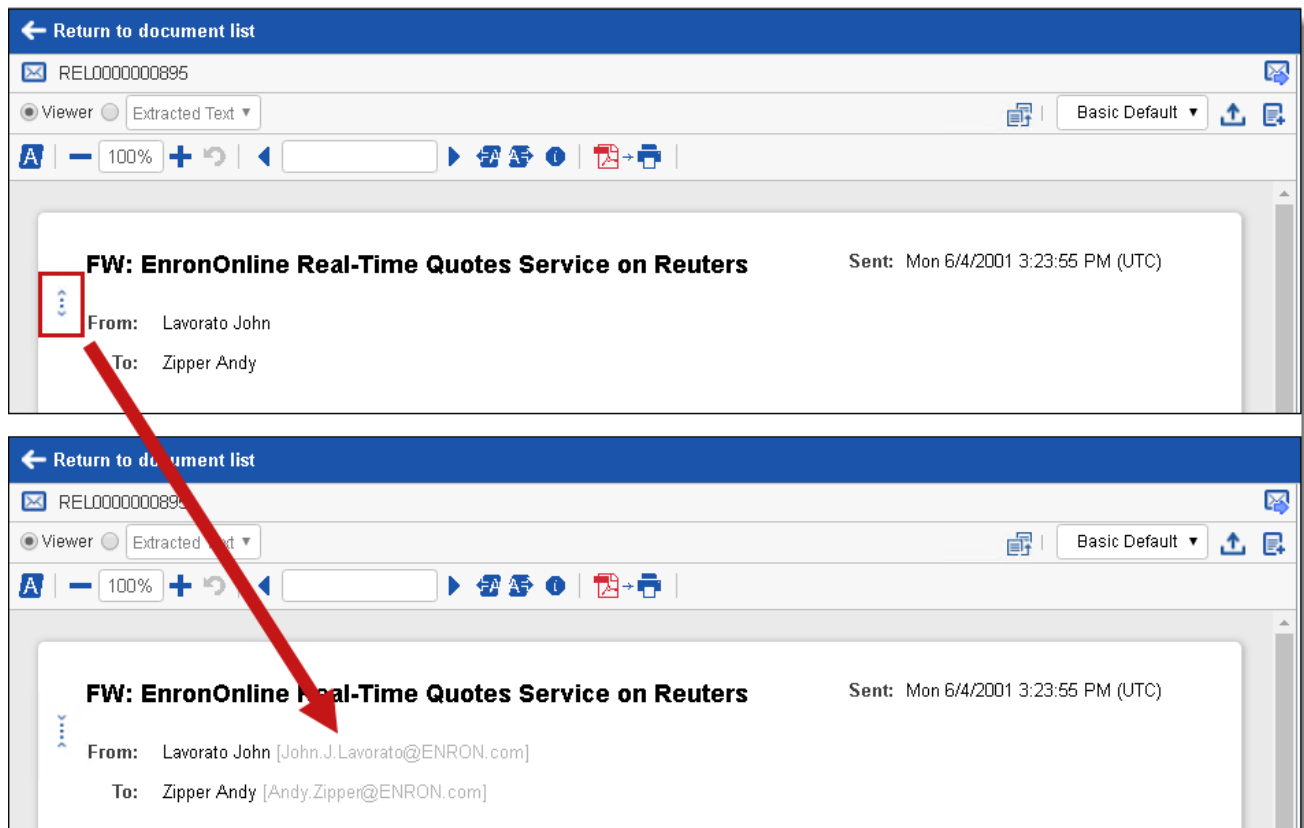
Relativity's viewer displays workspace documents. You can use the viewer menu to toggle the loaded formats of documents, such as native, image, extracted text, or production. If a document does not contain content for an individual mode, such as an image, the applicable viewer mode will not be available. Using the viewer, you can control the form of document that displays in the interface. If a document hasn't been imaged, you can image documents on the fly in the viewer.

If you don't see the document in the viewer, it either hasn't been loaded to the workspace, its conversion failed, or you don't have permission to see it.

In every mode of the viewer you have the option to Email Link to Document. By clicking , you can quickly send an email with a link to a specific document in Relativity. A new email message window opens and a secure link to the document copies into the body of the message.

Note: In the primary viewer mode of the Viewer, you can expand the email header to display full email addresses. If you collapse or expand an email header, the viewer maintains the expanded or collapsed state as you navigate through documents in the set.

(Click to expand)



Also see these related recipes:

- [Adding translated text to documents](#)

Using the viewer

Imagine you're a reviewer and your manager assigns you a batch of 50 documents to review. You open the batch and see a list of 50 Word documents, Lotus Notes files, and Outlook emails. Unfortunately, you don't have any of those applications installed on your computer, so you have to rely on Relativity's viewer to open the documents.

Without the viewer you would need to have each file's native application installed locally on your machine, and even then the data might become corrupted by opening the files within their respective software applications by changing the date modified. With the viewer you can easily review any of these various file types without launching each relevant application while preserving the metadata.

You open the first file, an .NSF file, and recognize it as a Lotus Notes file. When you open it in the viewer it doesn't render the document appropriately, so you click the Native radio button at the top. That displays the document how it would display in Lotus Notes, and you're able to make your coding decision.

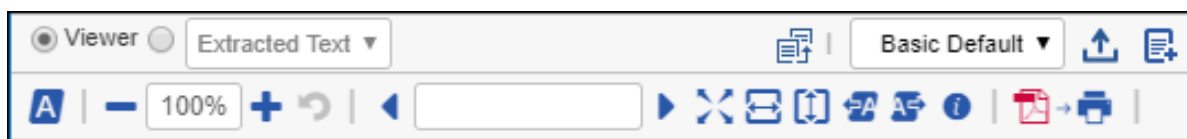
9.1 Viewer mode



Viewer mode displays an HTML rendering of the document that is as close to the original version of the document as possible. Viewer mode provides options for navigating through a single document and between documents in a document set. In Viewer mode you can also conduct text searching, highlighting text to copy and paste, zooming, arranging, and saving pages you review. You also have the option to print single documents from the viewer by saving the document as a PDF. For more information, see [Save as PDF](#).

Note: Beginning in Relativity 9.0, you can view files that are password protected in Viewer mode if those files are run through a processing or imaging set and the password is in the password bank. For more information, see the Password bank section of the Processing User Guide.

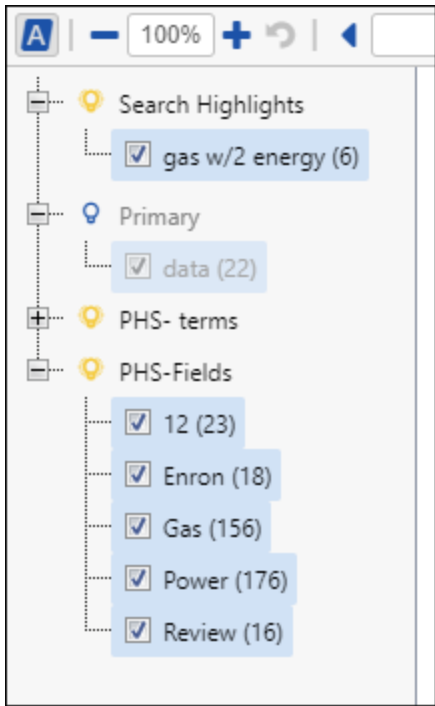
Viewer mode provides the following toolbar options:


Note: Relativity automatically hides toolbar buttons and controls that aren't applicable to the currently loaded document type so that your toolbar isn't cluttered while you're reviewing documents.



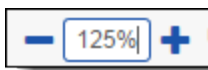
- **Show/Hide Persistent Highlight Pane**  - displays or hides a panel containing all persistent highlight sets in the workspace. See [Persistent highlight sets on page 44](#) for more information.
- **Show/Hide Persistent Highlight Pane**  - displays or hides a panel containing all Search Highlights from the criteria entered in the Search Bar and any persistent highlight sets in the workspace.



See [Persistent highlight sets on page 44](#) for more information.








- **Zoom Out/In**  - zooms out and in on the current document in increments of 10% within a range of 10% to 500%. If you attempt to zoom out to a percentage lower than 10%, the viewer automatically sets the display to 10%. If you attempt to zoom in to a percentage higher than 500%, the viewer automatically sets the display to 500%. Your zoom setting persists as you navigate through a document set. This means that if you've set one document to 150% and you go to the next document, the next document defaults to 150% zoom.

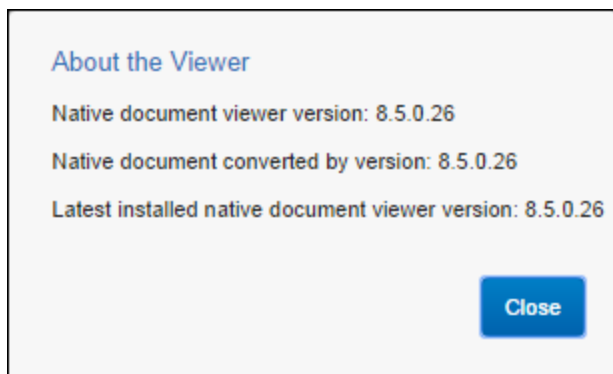
To specify a zoom percentage without using the zoom out/in toolbar buttons, type the number in the percentage field and press the Enter key.




- **Reset Zoom**  - resets the zoom to 100%.
- **Find Previous/Next**  - searches for terms in the current document and navigates through the hits. This searches the entire document, not just the active page.
 - Entering a term and either clicking the left or right arrow button or pressing Enter in this text box scrolls to and highlights the text of the next instance of the term (from the placement of the cursor).
 - Searching in this text box is not case sensitive
 - Search results match partially-entered words.

- Matching is done on the literal character typed into the search-box, including non-alphanumeric characters. This means that the viewer doesn't treat non-alphanumeric characters as wildcards.

- **Fit Actual**  - fits the document display to the actual size it was in its native application. By default, this resets the zoom percentage to 100%.
- **Fit Width**  - increases the size of the document to fit the maximum width of the viewer. This setting persists when you re-size the window.
- **Fit Page**  - fits the entire document into the total size of the page. Clicking this zooms out the document and reduces the font size.
- **Go To Next/Previous Highlight**  - moves through previous and next highlighted terms in the document.
- **About**  - displays the version of the native file converter that converted the document when you opened it from the document list, the native document viewer version, and the latest installed version of the native document viewer.



- If the "native document viewer version" doesn't match the "document converted by version", you'll receive a conversion mismatch warning when you try to view a document in the viewer. If you receive this, contact your system admin, as an upgrade may be required.
- **Print/Save as PDF**  - gives you the option of saving the current native document as a PDF file. Beginning in Relativity 9.4.254.2, when you click this option, a new window appears stating Saving. The document then opens in a new window in your browser as a PDF where you can then choose to save or print the document image. Prior to Relativity 9.4.254.2, clicking this option opens the following window, in which you must click **Save as PDF** again to save the document as a PDF. Note that the options for saving an image as a PDF are different than for a native.

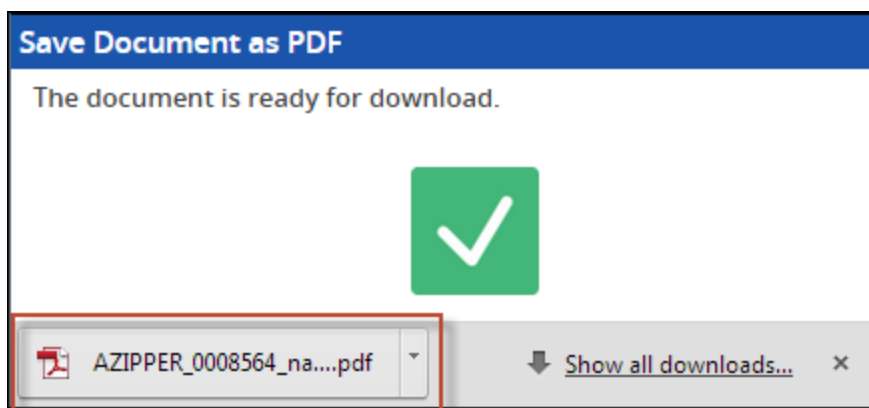


9.1.0.1 Searchable PDF Improvements per Configuration

When you Save as PDF from the Viewer or using the Mass Save As PDF Operations bar, most types of searchable PDFs will now have significantly smaller file sizes. More specifically, images without highlights, but configured to be searchable and stamped, will benefit from the most dramatic decrease in file size. But overall, the Save As PDF feature now generates reduced file saves for a wide range of configurations when creating searchable PDFs. In order to accomplish this for previously unknown file-types and mixed TIFF and JPEG Save As PDF jobs, Relativity now treats each page individually, instead of treating the entire document as a whole, allowing for the best file-size-reduction technique possible for each page.

Image Format	Redactions	Highlights	File Size Reduction
TIFF	Yes	No	Up to 76%
TIFF	Yes	Yes	Up to 43%
JPEG	Yes	No	Up to 43%
JPEG	Yes	Yes	Up to 43%


After you click **Save as PDF**, a copy of the document converts to a PDF file you can save from your web browser downloads.




Relativity assigns Save as PDF file names based on the type of file you save. Refer to the following for the file name format specific to the available file types:


- **Native** - DocumentIdentifier_native.pdf
- **Image** - DocumentIdentifier_image.pdf
- **Production** - BatesNumber_ProductionName.pdf


Beginning in Relativity 9.4.254.2, when you click this option, a new window appears stating Saving. The document then opens in a new window in your browser as a PDF where you can then choose to save or print the document image.

- **Show/Hide Hidden Content**  - Displays or hides hidden content in the current document. This option is only available when viewing a document native.

- **Replace document**  - replace a document native for the selected document.

Note: Whenever a document is replaced, the following fields are modified: Extracted text, Relativity Native Type, System Last Modified By, System Last Modified On, File Name, and File Size.

- **Upload Image**  - upload an image for the selected document.

- **Generate image**  - generate images for the current document.

9.1.1 Document Conversion

Beginning in Relativity Version, a new instance setting, MinimumSupportedVersionOfOutsideIn, will determine the OutsideIn version to use when converting a document. The earliest OutsideIn version Relativity will support is 2017.1. Any document converted using a prior OutsideIn version will automatically re-convert with at least the minimum supported version input as the value in this instance setting (see image below). As a result, users will no longer have to mass-convert to benefit from the latest OutsideIn version.

Instance Setting Information	
Name: MinimumSupportedVersionOfOutsideIn	Section: Relativity.Conversion
Value Type: Text	Machine:
Value: 2017.4	
Initial Value: 2017.4	
Description: Determines the minimum version of OutsideIn. If a document is converted with a lower version than set, the cache will register a miss and the document reconverted.	

Documents automatically re-convert in the following priority:

- Priority One - documents currently being viewed
- Priority Two - the next three documents in the review set
- Priority Three - related documents, checked-out batch documents, the first 10 documents in a list

All other documents not subject to the requirements listed above must be manually re-converted.

Note: If you don't have permission to the Local Access option on the Document object, you can't use the Ctrl+C or Ctrl+Ins options in either Viewer or Extracted Text mode.

9.1.2 Document Intelligence

Document Intelligence notifies you that there is hidden or annotated content present in the current document in the viewer. This hidden content are the annotations and modifications tracked in certain document formats. For more information on the file types, see [Tracking annotations below](#). When hidden content is found in a document, a pop-up modal appears in the lower right corner. Highlighting and bordering is also visible in the viewer where the changes were made and an annotation bar is available to sort and view each annotation. Once the notifications appear, you can then choose whether or not to view tracked changes, hidden text and comments in the HTML5 Viewer.

Note: Document Intelligence does not work in the Active X Viewer.

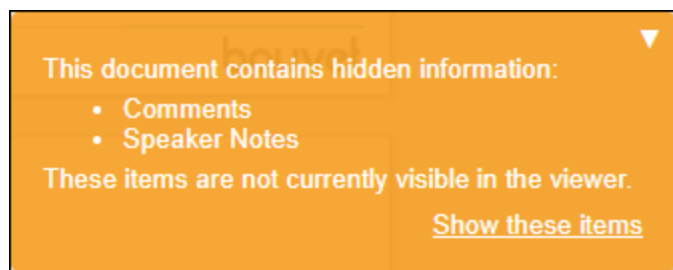
9.1.2.1 Tracking annotations


The various file types each have distinct annotations that are tracked. Below is each file type that is supported and the related tracked changes:

File type	File extensions	Annotation type	Tracked changes
Excel	.xls, .xlsx, .xlsb	Tracked Changes, formulas, hidden pages/-columns/rows, Comments	Inserted cell, moved cell, modified cell, cleared cell Inserted column, deleted column Inserted row, deleted row Inserted sheet, renamed sheet
Word	.doc, .docx	Tracked Changes, comments, hidden text	Insertions, deletions, moves
PowerPoint	.ppt, .pptx	Speaker notes, comments, hidden slides	
PDF	.pdf	Comments	

9.1.2.2 Using notifications and the annotation bar

When using Document Intelligence, an orange pop-up modal appears in the bottom right corner of the viewer when hidden content exists. Click on the pop-up modal to see the hidden content on that document. If there is no hidden content found, the modal will say so. If there is hidden content found, it lists each piece of content. Click Show these items to open the annotation bar.



A hidden content icon is available when a supported file type is in the viewer. Click  to open or close the annotations bar. If you are viewing an unsupported file type, the icon is not available. For supported file types, see the [Tracking annotations on the previous page](#).

Annotation bar

The annotation bar is for sorting and viewing the hidden content found with Document Intelligence. Each annotation has a card that lists the tracked change, a description of the change, time and date, and author of the change.

If there are multiple annotation cards in the annotation bar, then you can sort them in multiple ways. Click the **Sort By** drop down menu for these options:

- Location
- Author A-Z
- Author Z-A
- Oldest first
- Newest first
- Annotation type

Annotation types and highlights

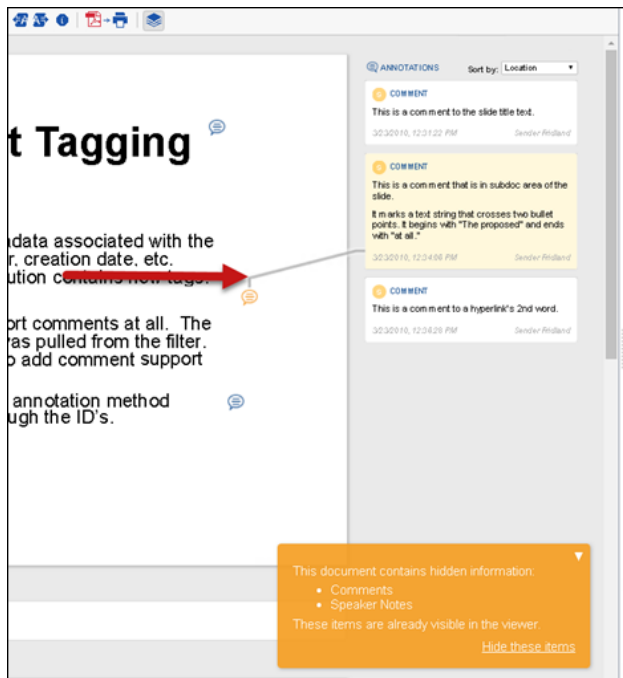
Each type of annotation comes with its distinct highlight in the viewer. Below is a table that lists each annotation type with its highlight in the viewer:

File type	Modification	Annotation
Excel	Inserted cell	Green dotted border around cell.
Excel	Deleted cell	Red dotted border around cell.
Excel	Modified cell	Purple dotted border around cell.
Excel	Moved cell	Red dotted border around original location; green dotted border around new location.
Excel	Inserted row	Green shading in the row header.
Excel	Deleted row	Red shading with "DEL" in the row header. If the row is added then deleted, the shading is purple.
Excel	Inserted column	Green shading in column header.
Excel	Deleted column	Red shading with "DEL" in the column header. If the row is added then deleted, the shading is purple.
Excel	Inserted sheet	Green shading in the sheet tab.
Excel	Hidden sheet	Grey text in the sheet tab.
Excel	Modified sheet	Purple shading on the sheet tab.

File type	Modification	Annotation
Word	Comments	Blue background on text and note bubble in document.
Word	Insertions	Green shading behind text.
Word	Deletions	Red shading behind text.
Word	Moves	Purple shading behind text.
Word	Hidden text	Red shading behind text.
PowerPoint	Speaker notes	Page under sheet.
PowerPoint	Comments	Note bubble in presentation.
PowerPoint	Hidden slide	Hidden icon in bottom left corner of slide.
PDF	Comments	Note bubble in document.

Leader lines

Clicking on an annotation in the viewer connects the selected annotation to the related annotation tile in the annotation bar. Click on another annotation to view the leader line to that annotation card. One grey connector line is available at a time. Click the same annotation to remove the leader line.



Note: The "Has Hidden Data" field is populated during Processing. The Hidden Content that the Viewer finds may not be perfectly in-sync with the Hidden Data that the Processing engine finds.

9.1.3 Copying text in the viewer

While viewing a document in Viewer mode, you have several right-click options, including the **Copy** option. Use this option to copy text from the document you're currently viewing and then paste it into another application.

To do this:

1. Highlight the text you want copied.
2. Right-click, and then select **Copy** from the menu.
3. Copy the text from the Copy Text window with another right-click, and then **Copy** or a Control+C or Command+C keyboard command.

You can't copy text if you:

- Haven't highlighted any text.
- Don't have permission to the Local Access option on the Document object. This is the same permission that permits you to open the file in its native application. For more information, see Object list in Relativity Admin guide.

9.2 Native mode

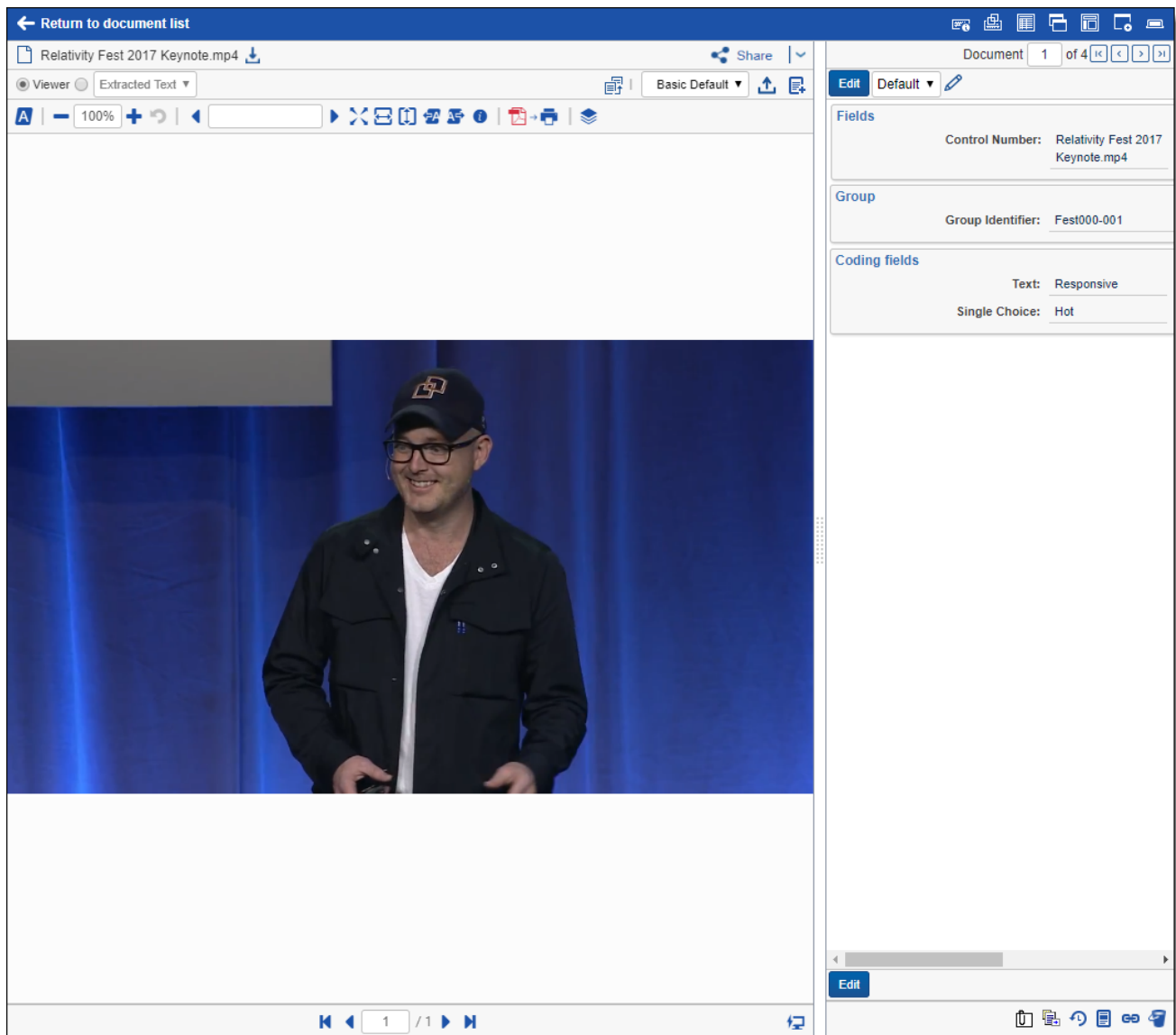
In native mode, you can download a file in the format that a software application used to create it. This file format is referred to as a native form. This viewer option is only available if a native copy of a document exists in Relativity. In addition, you need to meet the following requirements:

- You must have permissions to download the file. If you're a reviewer but you don't have permissions, then you can't download the file.
- Your group must be given the Local Access permission. For more information, see the Admin Guide.

9.2.1 Streaming audio and video files

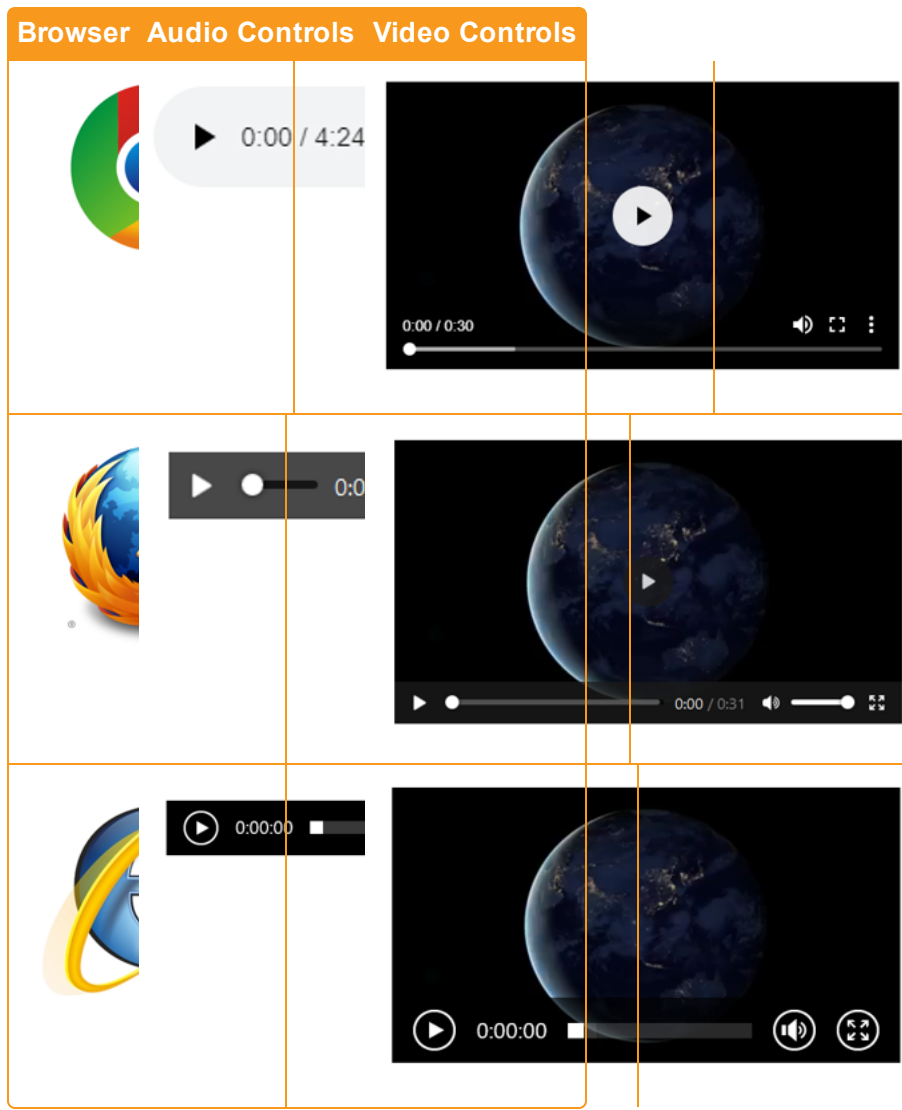
Starting in Relativity 9.7, audio and video files can be streamed in native mode. Audio and video file type compatibility varies depending on your internet browser.

Note: If an audio or video file has not been opened in the Viewer, it may display with a value of No for the Supported by Viewer field. Once a file has been successfully opened by the Viewer, the Supported By Viewer field displays Yes.



Note: To adjust how large of files can be streamed in the Viewer, edit the **MaximumNativeSizeForViewerForMediaFilesinMegaBytes** instance setting.

The audio and video controls that display in the Viewer depend on your internet browser.



9.2.2 Downloading native files

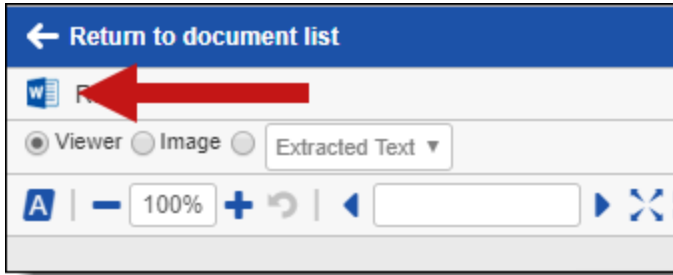
You can download various file types from the viewer. If you don't see this option in the viewer, you may not have sufficient permissions or the Prevent Native Download setting for that particular file type has been set to Yes.

Depending on your browser, some of the following steps for downloading a native file will be slightly different:

1. Locate file icon next to the document identifier.

Notes: The icon is different for different file types.

2. Click the file icon.



3. In your browser, click **Keep**.

4. Click .

5. Click **Open**.

Note: You can also select to Always open files of this type or to Show in folder.

For more information, see [Viewer-supported file types on page 118](#).

9.3 Image mode

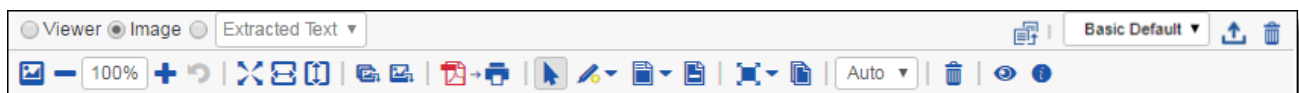
When you switch to **Image** mode, the viewer displays a TIFF or JPEG version of the document. You can highlight and redact images in this mode. Image mode is available only if you've loaded an imaged version of the document in the viewer or if you've manually imaged the file through the **Image** button on the right side of the toolbar.


Note: If an error occurs while switching to image mode, ensure that the values for the `MaximumImageCountForViewer` and `DocumentTimeout` instance settings are high enough to process the image you're trying to open.

When you open a document that has not yet been imaged, you have the option to image the document on the fly while in Viewer mode. For more information, see [Imaging on the fly on page 100](#).


The redactions that are burned into a produced image are the redactions that were on the image at the time that you produced it. If you add or remove redactions from an image after you've produced it, then the image and the produced version of that image will be out of sync.

Relativity automatically hides toolbar buttons and controls that aren't applicable to the currently loaded document type so that your toolbar isn't cluttered while you're reviewing documents. The viewer displays the following icons for the image version of the document:

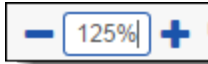








- **Show/Hide Thumbnails**  - displays a thumbnail version of the document in a new pane on the left side of the viewer. Each page of the document you're reviewing has its own numbered

thumbnail.




- **Zoom Out/In**  - zooms out and in on the current document in increments of 10% within a range of 10% to 500%. If you attempt to zoom out to a percentage lower than 10%, the viewer automatically sets the display to 10%. If you attempt to zoom in to a percentage higher than 500%, the viewer automatically sets the display to 500%. Your zoom setting persists as you navigate through a document set. This means that if you've set one document to 150% and you go to the next document, the next document defaults to 150% zoom.











To specify a zoom percentage without using the zoom out/in toolbar buttons, type the number in the percentage field and press the Enter key.



- **Reset Zoom**  - resets the zoom to 100%.
- **Fit Actual**  - fits the document display to the actual size it was in its native application. By default, this resets the zoom percentage to 100%.
- **Fit Width**  - increases the size of the document to fit the maximum width of the viewer. This setting persists when you re-size the window.
- **Fit Page**  - fits the entire document into the total size of the page. Clicking this zooms out the document and reduces the font size.
- **Rotate all pages**  - rotates all pages in a document clockwise 90 degrees.
- **Rotate current page**  - rotates only the current page clockwise 90 degrees.

Note: Image rotation is persistent. Any pages that you rotate will be rotated the next time you return to them in the viewer and for other users who view them after you rotate them. Rotation is also applied when you run the production containing the images.

- **Print/Save as PDF**  - gives you the option of saving the image as a PDF. For more information, see [Saving an image as a PDF on page 96](#).
- **Selector**  - select within a document.
- **Highlight - <Color>**  - highlights the selected text with the color you specify from the drop-down. The default color is yellow. Select from the following:
 - Pink
 - Orange

- Yellow
 - Green
 - Blue
 - Purple
- **Redact - <Style>**  - enables single redaction tool. For more information on redacting, see [Creating basic redactions on page 37](#). Select from the following types of redactions:
 - **Black** - applies a solid black box to the selected text.
 - **Cross** - applies a white box with an X in the middle of it over the selected text.
 - **Text** - applies a box over the selected text, in which you can add text such as "Privileged" or "Redacted."
 - **White** - applies a solid white box over the selected text.
 - **Redact - Inverse**  - enables the inverse redaction tool. For more information, see [Creating inverse redactions on page 38](#).
 - **Redact - Full page**  - enables the full-page redaction tool. The drop-down menu for this redaction type offers the same options as the basic Redact icon, except that the redaction you choose is applied to the entire page. For example, if you select White, the entire page becomes white. For more information, see [Creating full-page redactions on page 38](#).
 - **Mass Redact**  - apply a full-page redaction across all images or a range of images in the document. For more information, see [Creating mass redactions on page 39](#).
 - **Font Size**  - change the font size of the text within a text box redaction. For more information, see [Editing font size in text box redactions on page 42](#).
 - **Delete Redactions and Highlights**  - mass delete markups from any or all images in the document. For more information, see [Mass deleting markups on page 42](#).
 - **Markup Visibility**  - changes the visibility mode of the markups between full visibility, transparent and hidden. By default, this is set to Solid, which means all highlights and redactions appear as solid as you applied them. For more information, see [Controlling markup visibility on page 43](#).
 - **Replace document**  - replace a document native for the selected document.
 - **Upload Image**  - upload an image for the selected document.
 - **Delete Images** button  - click to delete an existing document image.

Note: If you don't have permission to the Local Access option on the Document object, you can't use the Ctrl+C or Ctrl+Ins options in either Viewer or Extracted Text mode.

9.3.1 Saving an image as a PDF

Clicking this icon brings up the following window, in which you can specify your PDF settings:

Print/Save Images As PDF

Choose the page range and image options to save a PDF of this document.

Image selection:

- All images
- Current image
- Image range:

Image options:

- Make text searchable
- Include highlights
- Include redactions
 - Normal
 - Transparent
- Include slip sheet:
- Stamp identifier:
- Stamp location:

Print/Save As PDF **Cancel**

- **Print range** - select from the following standard print range options:
 - **All images** - saves all images in the document.
 - **Current image** - saves only the image you're currently on.
 - **Image range** - saves a range of images that you specify in the text box to the right.
- **Print options**- select from the following options:
 - **Make text searchable** - check this box to create searchable text in an electronic PDF.
 - **Fastest performance** - runs the OCR job with the lowest accuracy and highest speed.
 - **Highest accuracy** - runs the OCR job with the highest accuracy and the slowest speed
 - **Standard OCR** - runs the OCR job with medium accuracy and average speed.
 - **Include highlights**- check this box to include in the PDF any highlights that you added to the images in the document.

- **Include redactions**- check this box to include in the PDF any redactions you applied to the images in the document. If you check this box, select one of the following redaction display options:
 - **Normal**- saves the PDF with the redactions displayed normally, as you applied them to the images in the document.
 - **Transparent** - saves the PDF with semi-transparent redactions. Note that with this option, the reader of the PDF can see both the text under the redaction and a trace of the redaction itself.

Note: Transparent redactions are useful when an attorney needs to access a hard copy (because they are unable to log in to a Relativity environment) of a document in order to approve the redactions that someone else applied to that document. In this case, the attorney needs a printed copy of the document that clearly displays both the redacted text and the fact that the text was redacted. Transparent redactions are also relevant when a judge needs to decide if one side of the litigation covered up too much a piece of evidence (the document).

- **Include slip sheet**- includes a slip sheet between the images in the document. If you check this box, you must select one of the following from the drop-down to the right:
 - **(Blank Page)**- includes a blank page slip sheet.
 - **(Identifier Only)**- includes a page with the document identifier stamped on it.
 - **<Document layouts>** - includes a slip sheet with the fields from any document coding layout. The values for the document are shown for those fields.
- **Stamp identifier**- select whether you'd like to print any identifier value on the images in the PDF. You have the following options:
 - **None** - doesn't include any identifier.
 - **Document Identifier**- includes the images' document identifiers.
 - **Image Number**- includes the images' page identifiers.
- **Stamp location**- select the location on each image in which you'd like either the Document Identifier or the Image Number stamp to appear. This is not available if you selected None for the Stamp identifier setting. Select from the following locations:
 - **Top Left**
 - **Top Center**
 - **Top Right**
 - **Bottom Left**
 - **Bottom Center**
 - **Bottom Right**

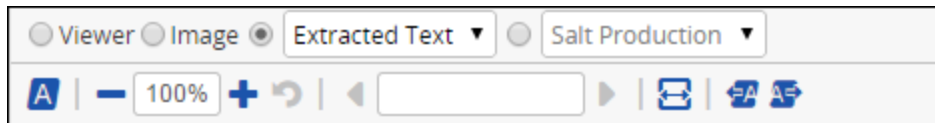
9.4 Extracted text mode



When you switch to **Extracted Text** or **Long Text** mode, the viewer toolbar displays a drop-down menu of extracted text and all long text fields made available in the viewer on the field edit/creation page. See *Creating fields in the Admin guide*. The drop-down menu lists long-text fields that contain text for the current document open in the viewer and those you have permissions to.

Note: Relativity displays all long text fields made available in the viewer in the drop-down menu, regardless of whether that field contains text for the current document. If you select a long text field from the drop-down, and the current document doesn't have text for that field, the viewer appears blank.

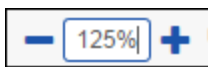
Extracted text mode provides the following options:



Note: Relativity automatically hides toolbar buttons and controls that aren't applicable to the currently loaded document type so that your toolbar isn't cluttered while you're reviewing documents.



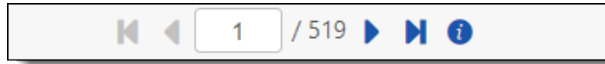
- **Show/Hide Persistent Highlight Pane**  - displays or hides a panel containing all persistent highlight sets in the workspace.
- **Zoom Out/In**  - zooms out and in on the current document in increments of 10% within a range of 10% to 500%. If you attempt to zoom out to a percentage lower than 10%, the viewer automatically sets the display to 10%. If you attempt to zoom in to a percentage higher than 500%, the viewer automatically sets the display to 500%. Your zoom setting persists as you navigate through a document set. This means that if you've set one document to 150% and you go to the next document, the next document defaults to 150% zoom.



To specify a zoom percentage without using the zoom out/in toolbar buttons, type the number in the percentage field and press the Enter key.



- **Reset zoom**  - resets the zoom function to 100 percent.
- **Find previous and next**  - searches for terms in the current document and navigates through the hits.
 - Entering a term and either clicking the left or right arrow button or pressing Enter in this text box scrolls to and highlights the text of the next instance of the term (from the placement of the cursor).
 - Searching in this text box is not case sensitive

- Search results match partially-entered words.
- Matching is done on the literal character typed into the search-box, including non-alpha-numeric characters. This means that the viewer doesn't treat non-alphanumeric characters as wildcards.
- When you've reached the last term in a multi-page document, a pop-up modal will appear prompting you to change the page. Click **Close** and use the file navigator to move to the next page.



- **Fit Width**  - fits the document to the window. This function is only available in the preview mode.
- **Go To Next/Previous Highlight**  - moves through previous and next highlighted terms in the document. For multi-page files, use the file navigator at the bottom of the page to move to the next highlighted term.

Note: If you don't have permission to the Local Access option on the Document object, you can't use the Ctrl+C or Ctrl+Ins options in either Viewer or Extracted Text mode.

9.5 Productions mode

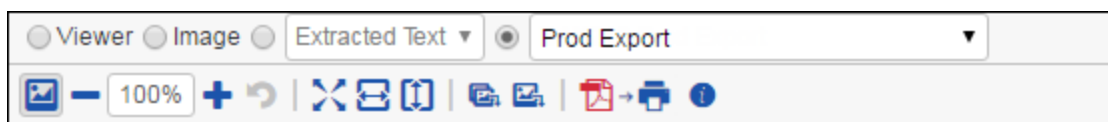
When you switch to **Productions** mode, the viewer toolbar displays a drop-down menu of available production sets that contain the document currently open in the viewer. For information about creating production sets, see Production sets in the Admin guide.


Note: The redactions that are burned into a produced image are the redactions that were on the image at the time that you produced it. If you add or remove redactions from an image after you've produced it, then the image and the produced version of that image will be out of sync.


Select a production set from the drop-down menu to see how a document was produced in the selected production. If a document isn't included in a production, the productions mode option is unavailable.

Productions mode provides the following options:

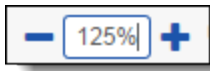
Note: Relativity automatically hides toolbar buttons and controls that aren't applicable to the currently loaded document type so that your toolbar isn't cluttered while you're reviewing documents.









- **Show/Hide Thumbnails**  - displays or hides a panel containing thumbnail images for pages of a document open in the viewer.



- **Zoom Out/In**  - zooms out and in on the current document in increments of 10% within a range of 10% to 500%. If you attempt to zoom out to a percentage lower than 10%, the viewer automatically sets the display to 10%. If you attempt to zoom in to a percentage higher than 500%, the viewer automatically sets the display to 500%. Your zoom setting persists as you navigate through a document set. This means that if you've set one document to 150% and you go to the next document, the next document defaults to 150% zoom.

To specify a zoom percentage without using the zoom out/in toolbar buttons, type the number in the percentage field and press the Enter key.




- **Reset zoom**  - resets the zoom function to 100 percent.
- **Fit Actual**  - fits the document display to the actual size it was in its native application. By default, this resets the zoom percentage to 100%.
- **Fit Width**  - increases the size of the document to fit the maximum width of the viewer. This setting persists when you re-size the window.
- **Fit Page**  - fits the entire document into the total size of the page. Clicking this zooms out the document and reduces the font size.
- **Rotate all pages**  - rotates all pages in a document clockwise 90 degrees.
- **Rotate current page**  - rotates only the current page clockwise 90 degrees.

Note: Image rotation is persistent. Any pages that you rotate are rotated the next time you return to them in the viewer and for other users. Rotation is also applied when you run the production containing the images.

- **Print/Save as PDF**  - gives you the option of saving the image as a PDF. For more information, see [Saving an image as a PDF on page 96](#).
- **About**  - displays the version of the production viewer.

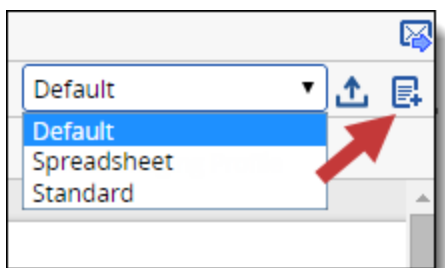
9.6 Imaging on the fly

You can image a single document on the fly using the **Image** button in the viewer.

You can image a single document on the fly using the  button in the viewer.

Note: Beginning in Relativity 9.5.342.116, the Imaging Request Agent is required to run any imaging job in your environment. This agent is responsible for performing background tasks when any imaging request is submitted via mass imaging, image on the fly, or imaging set. For initial installations of Relativity 9.5.342.116, an Imaging Request Agent is automatically installed and enabled in your environment. If you're upgrading to Relativity 9.5.342.116 or if at any point you need to install an additional agent, you need to do so manually. Beginning in Relativity 9.5.370.136, the Imaging Response Agent is also required to run any imaging job in your environment. This agent is responsible for properly picking up imaging set, mass imaging and image-on-the-fly messages from Service Bus (as published by Workers) and directing them to the proper finalization logic in Relativity. For initial installations of Relativity 9.5.370.136, an Imaging Response Agent is automatically installed and enabled in your environment. If you're upgrading to Relativity 9.5.370.136 or if at any point you need to install an additional agent, you need to do so manually.

Using this feature, you can select any imaging profile you have permissions to view and use it to image the document.



Note: If the source file of the document you are imaging is changed during the conversion process, for example through overlay, that document becomes undeliverable and you receive an error. To resolve this error, refresh the page or re-image the document.

After imaging a document on the fly, you can access thumbnail renderings of the imaged pages of the document.


Imaging some file formats can cause problems. Consider the following:

- Many PDFs render and image very well. However, you may have problems rendering and imaging some PDFs due to the variety of their content.
- While most Microsoft Office documents render and image well, you may experience issues when imaging documents with embedded files.
- You may have problems rendering and imaging vector-based documents like Visio and CAD.

For more information, see the Viewer-Supported File Types guide.

Note: The default priority for all image-on-the-fly jobs is determined by the current value of theImageOnTheFlyJobPriorityDefault entry in the Instance setting table.

9.7 Standalone document viewer

To view the document in a separate browser window, click the standalone document viewer icon  in the upper right of the core reviewer interface. This opens another viewer pane with an **Unsynced** designation at the top of the screen. This means that the standalone viewer isn't yet set to synchronize with the core reviewer interface.

To synchronize the standalone viewer with the core viewer, click **Unsynced**. This switches the standalone viewer setting to **Synced** where you can view text and images, natives, and productions side-by-side while navigating through the document queue.




Note: Keyboard shortcuts are available for use in the standalone viewer. For example, if you execute the shortcut for **Save & Next** in the standalone viewer, each window performs the operation and moves to the next document.

9.8 Related items pane


The related items pane is located at the bottom-right corner of the core reviewer interface. Related items are customizable groups of documents within a workspace. Common examples are family groups, duplicates, or similar documents.




The related items toolbar includes the following:



- **Related items**  - displays a group of documents related to the active document. Options vary within the workspace. Hover over each icon to display the name of the item. Examples include: family group, duplicates, and thread group.
- **RAR Overturn Analysis**  - displays overturned documents, seed documents, and seed excerpts. For more information about this functionality, see Reports in the Assisted Review Guide.
- **Document history**  - displays a history of actions taken on the current document. You may not have access to document history. If you store your audits in Data Grid, this displays the field name, old value, and new value.

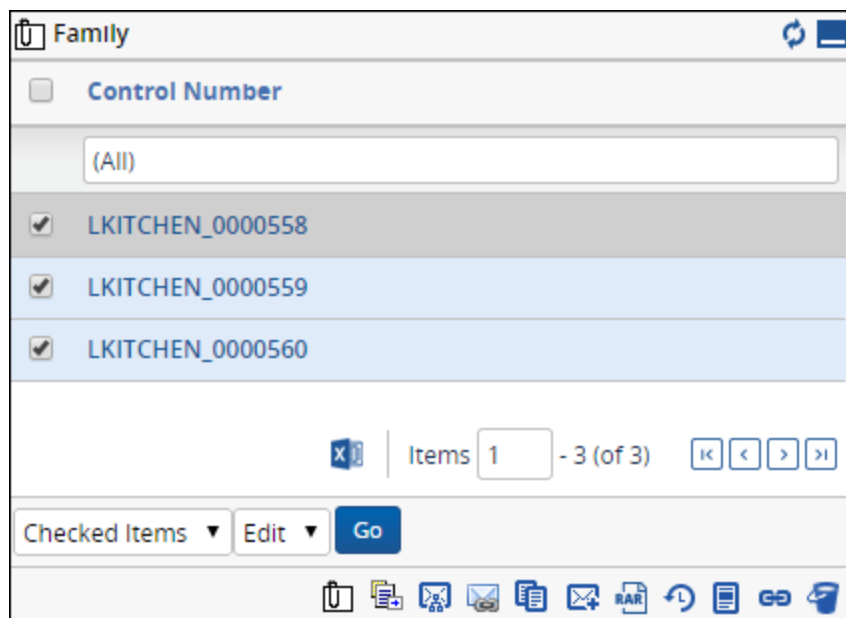
Note: In the document history pane, you can click the **Details** link to display a pop-up with the audit history for the document. Click **Run Details** to display information about document imaging jobs, including the name of the imaging profile and the formatting options used during mass imaging or imaging on the fly.

- **Production**  - displays all productions in which the document was included. You may not have permissions to view production information.

- **Linked**  - displays all linked records on the active document.
- **Search results**  - displays the results of a Relativity Analytics search.
- **Batch sets**  - shows all the batch sets for the active record. See Batches in the Admin manual. You may not have permissions to view this section.

Use the related items pane to quickly identify documents related to the active document. You can also use this pane to act on those groups of related items.

For instance, in the example of the related items pane below, the active document is highlighted and listed with two related family documents. You can select some or all of the documents in the related items pane and click **Go**. This opens a window for you to access all of your active layouts – the same layouts available in the layouts pane. Using these layouts, you can make coding decisions and apply them to the selected documents using mass editing. See Mass edit in the Admin guide.



9.8.1 Securing Related items

Users are granted permissions or access to related items by default. If you would like to prevent a user from accessing these features, you can disable the following permissions or secure them using item-level security:


Related item	Permission or item-level security
Email Duplicates	Secure using Email Duplicate Spare Field
Thread Group	Secure using Email Thread Group Field
Near Dupe Group	Secure using Textual Near Duplicate Group Field
Conversational Family	Secure using the Conversation Family Field

Related item	Permission or item-level security
Duplicates	Secure using the MD5 Hash Field
Family	Secure using the Group Identifier Field
Batches	Disable the View Batch Pane permission in Admin Operations
RAR Overturn Analysis	Disable the Assisted Review Overturn permission in Object Types
Production History	Disable the Production permission in Security
Linked Documents	Secure using the Link Pane view. This icon cannot be hidden but you can restrict access to it.
Document History	Disable the View All Audits permission in Admin Operations
Search Results	This icon cannot be hidden or secured in Relativity.

9.9 Thumbnail viewer

When in Image or Productions mode, you can access and browse thumbnail renderings of a document's pages. Quickly scan, locate, and navigate to pages in an open document.

Any highlights or redactions you apply to images won't appear in the thumbnail viewer images. See [Markups on page 35](#).

To open the thumbnail viewer when in Image or Productions mode, click the **Show/Hide Thumbnails**  button on the viewer toolbar. The thumbnail viewer opens on the left side of the screen. Scroll up and down to navigate all pages in the open document and click a page to view it.

Note: To access to the thumbnail viewer, you must have the Admin Operation permission View Image Thumbnails. If you don't have this permission, contact your system admin.

The number of thumbnail images in a set is determined by the size of your browser window. Resize your browser window to view a different number of thumbnails per set.

9.10 Adding information to CaseMap

You can capture documents and text in the Relativity viewer for analysis in the CaseMap tool. You can then use a mass operation to export the data to CaseMap. See Send to CaseMap in the Admin guide for details.

Note: CaseMap is not compatible with Windows 8.

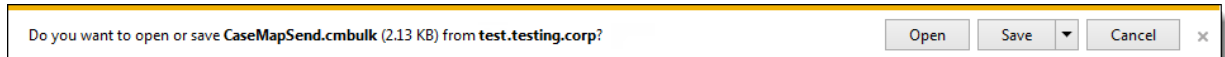
9.10.1 Adding a document to CaseMap

Note: When you manually map fields for documents, ensure to map the control number of the document to CaseMap's full name field in order for fact to document linking to work properly.

To add a document to a CaseMap database from the viewer:

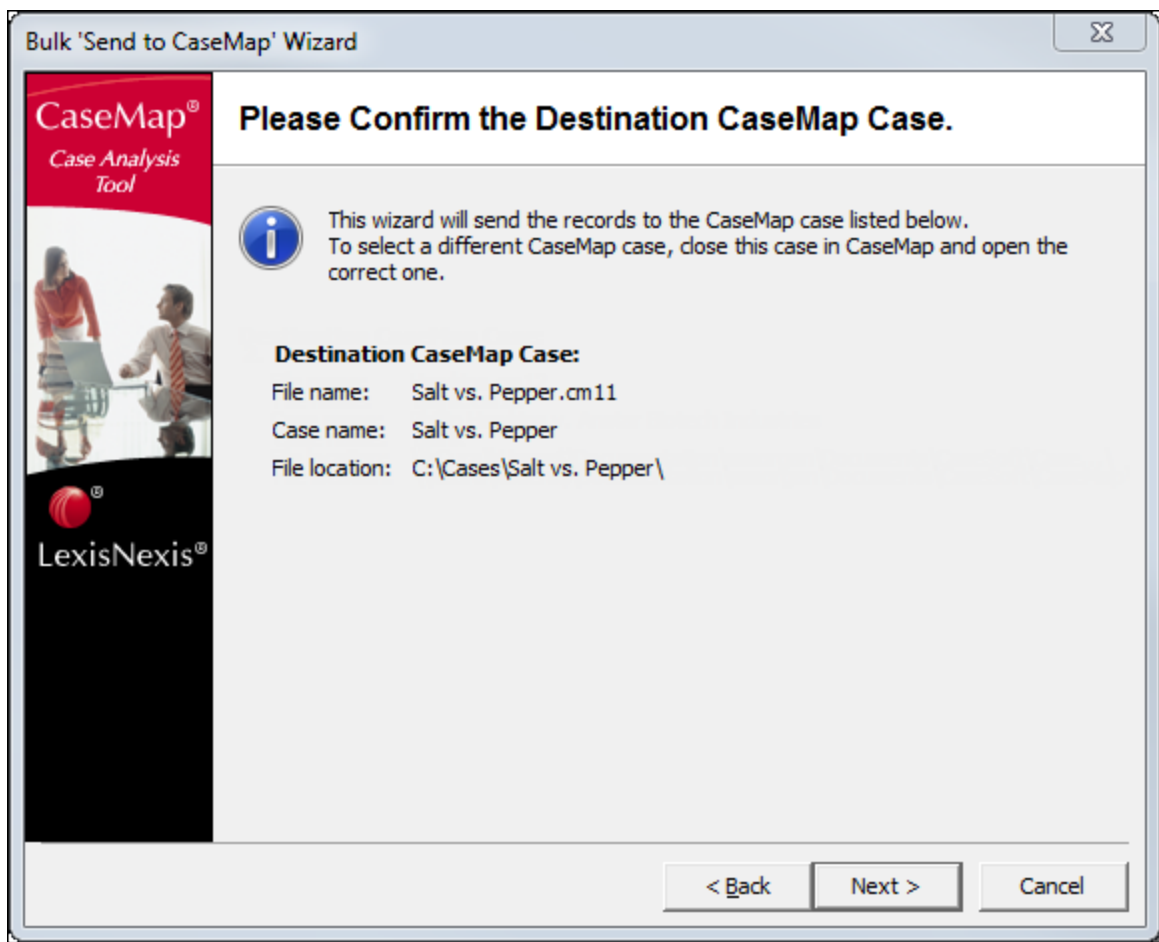
1. Right-click the document and select **Case Map > Add to CaseMap**.

This action results in the download of a .cmbulk file. Your browser may prompt you with the options to open or save the downloaded .cmbulk file.

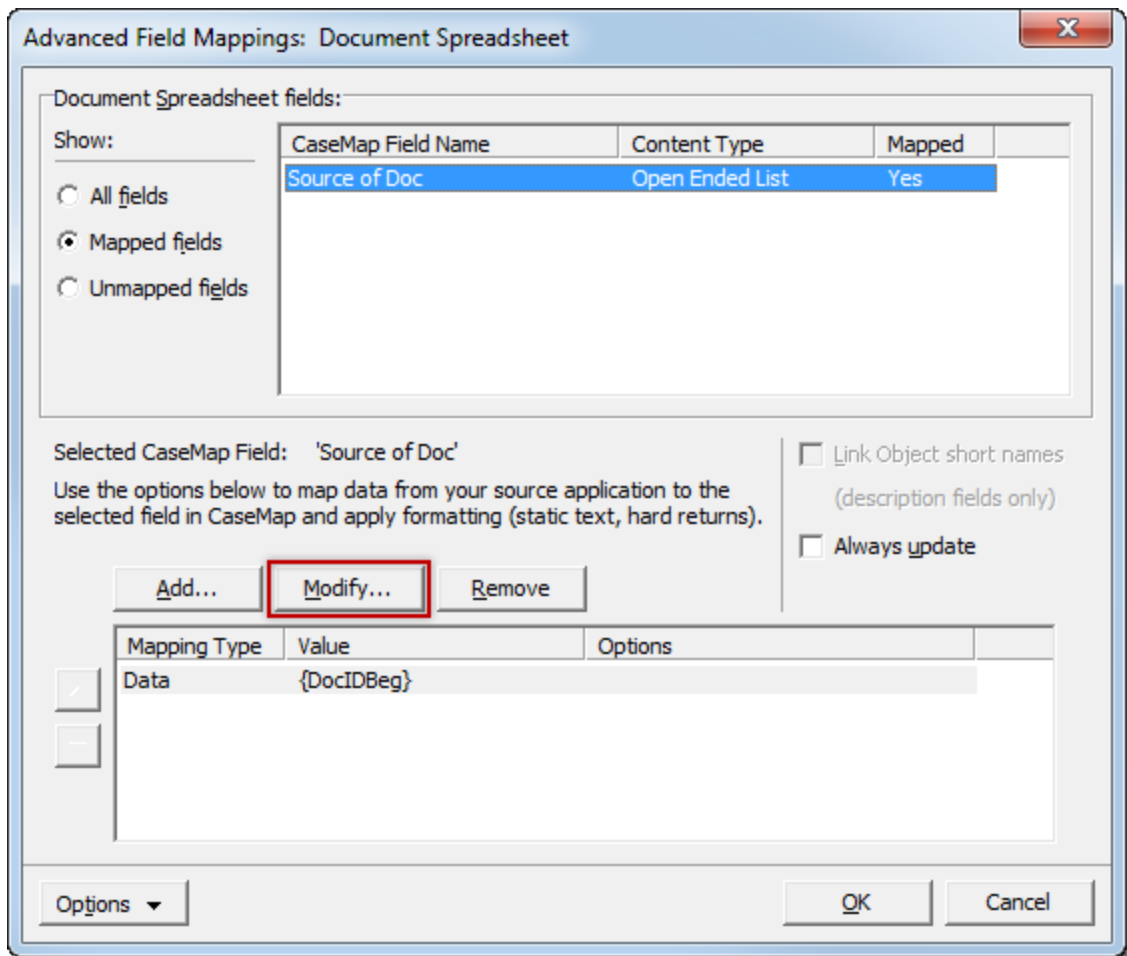


Note: The **HideCaseMapContextMenuOption** instance setting hides the **Add to CaseMap** right-click menu option by default.

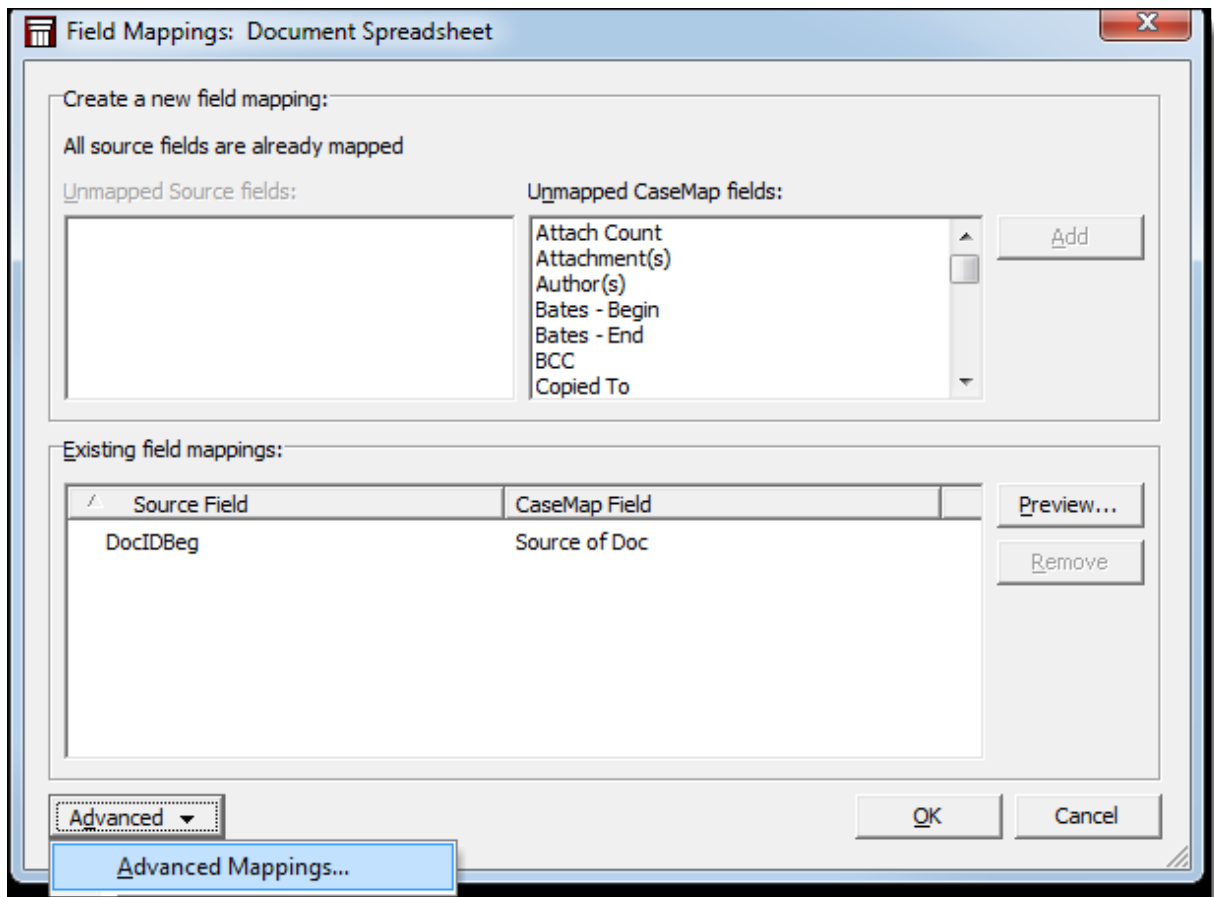
2. Open the .cmbulk file download from your browser to launch the **Bulk 'Send to CaseMap' Wizard**.
3. Select **Yes**.
4. Click **Next**.



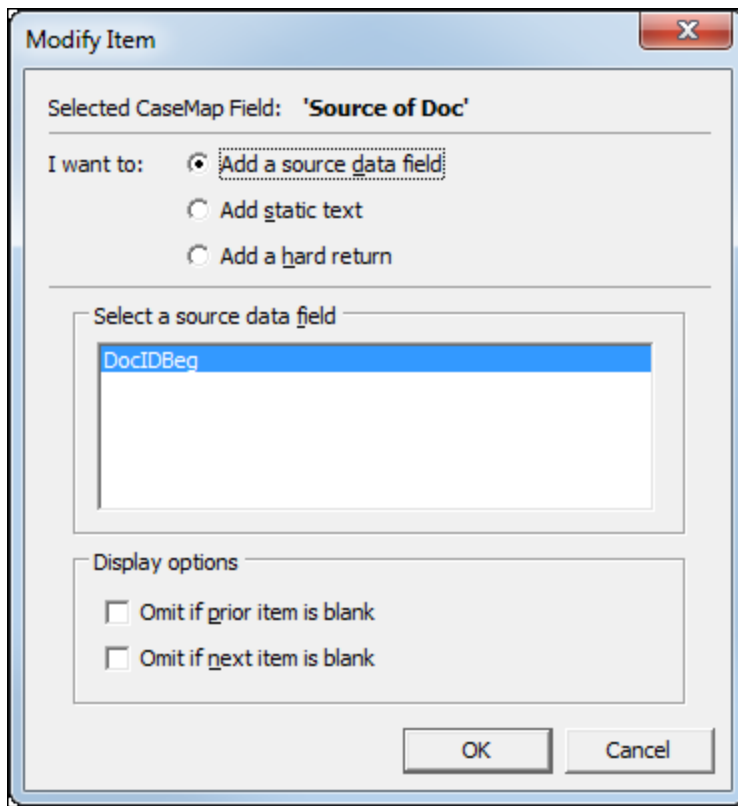
5. Click **Next** to Confirm the Destination CaseMap Case. The **View/Edit Field Mappings...** window opens.
6. Click **Modify....** The **Field Mappings: Document Spreadsheet** opens.



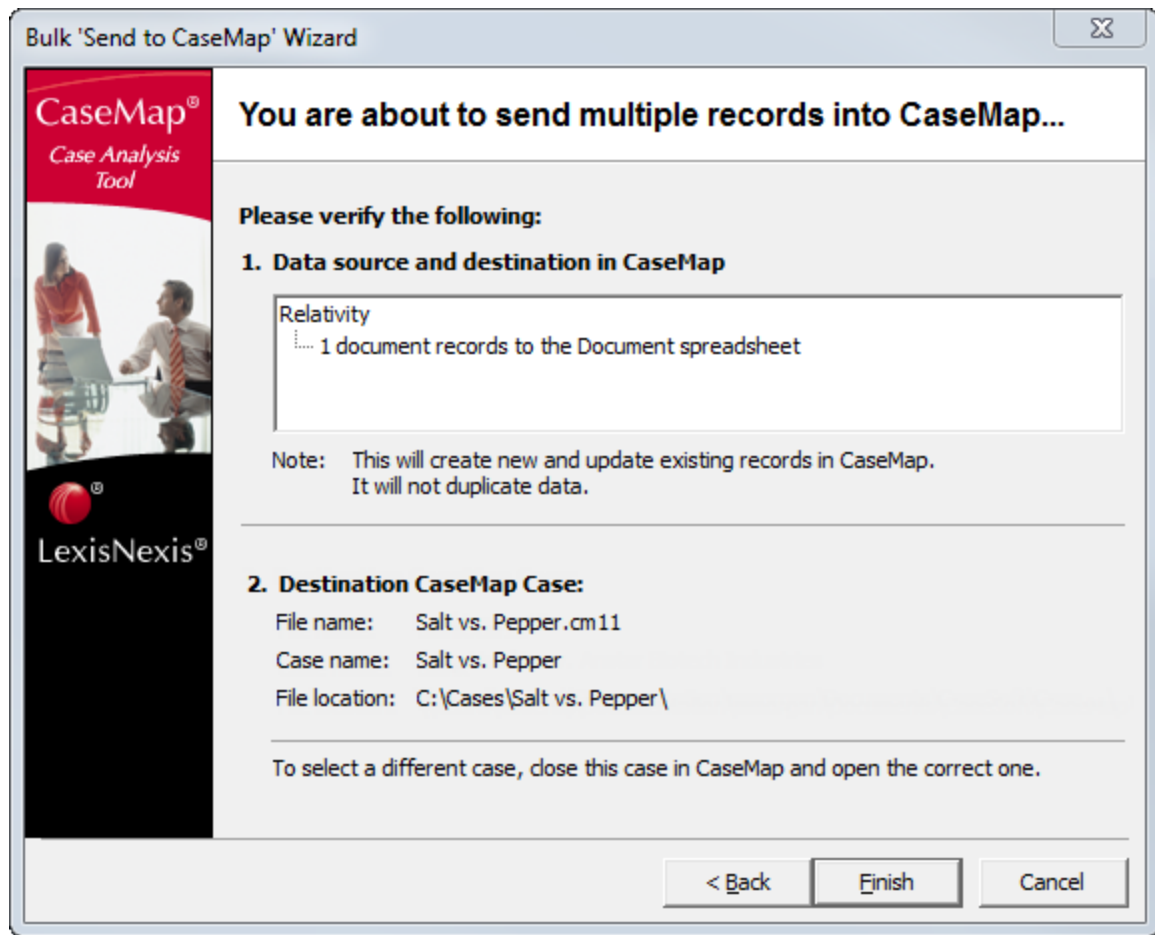
7. Click **Advanced > Advanced Mappings**.



8. (Optional) Click the CaseMap Field Name and then click **Modify....** The Modify Item window opens.



9. (Optional) Select **Add a source data field** and then select the source data field.
10. (Optional) Click **Ok** to close the Modify Item window.
11. (Optional) Click **Ok** to close the **Advanced Field Mappings: Document Spreadsheet** window.
12. Click **Ok** to close the **Field Mappings: Document Spreadsheet** window.
13. Click **Next**.
14. Click **Finish**.



The document appears in CaseMap.

9.10.1.1 Linking a document to CaseMap

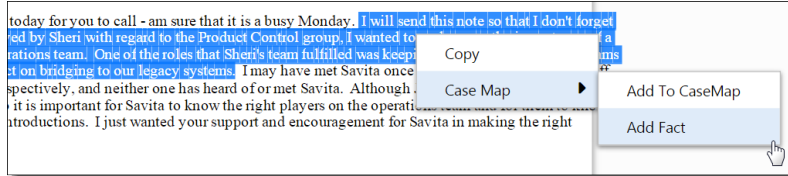
Next, you must link the document to CaseMap:

1. Choose the CaseMap category for the document (Document, Pleading, Proceeding, Research Authority, or Other).
2. Enter a **Full Name** for the new document you're linking to CaseMap.
3. Enter a **Short Name** for the document you're linking.
4. (Optional) Click **Advanced** to Save or Save & Edit the document linking information you've already entered.
5. Click **OK**.

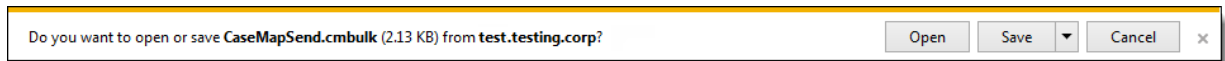
9.10.2 Adding a fact to CaseMap

In addition to adding a document to CaseMap, you can add a highlighted text excerpt from a document as a fact. To add a fact to CaseMap:

1. Highlight the text, right-click and select **Case Map > Add Fact**.

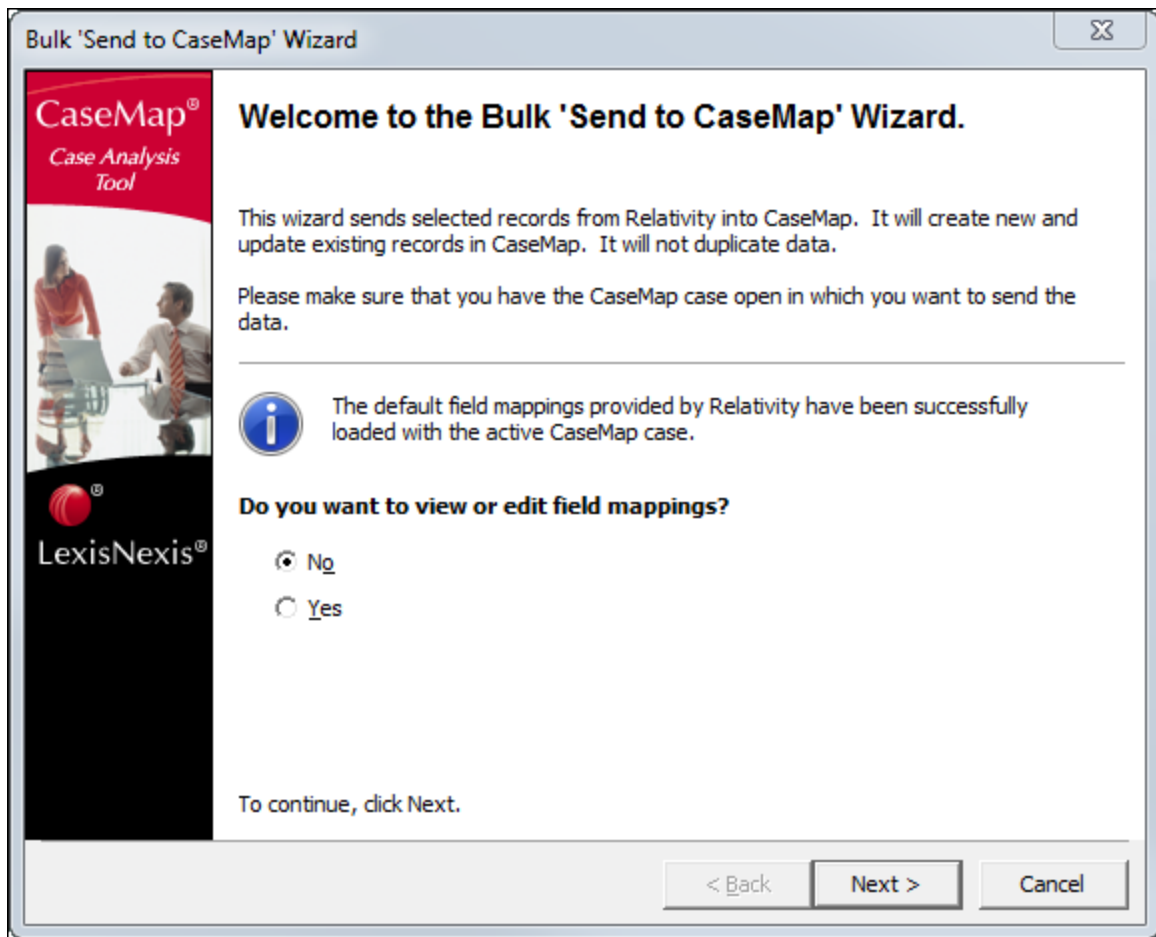


This action results in the download of a .cmbulk file. Your browser may prompt you with the options to open or save the downloaded .cmbulk file.

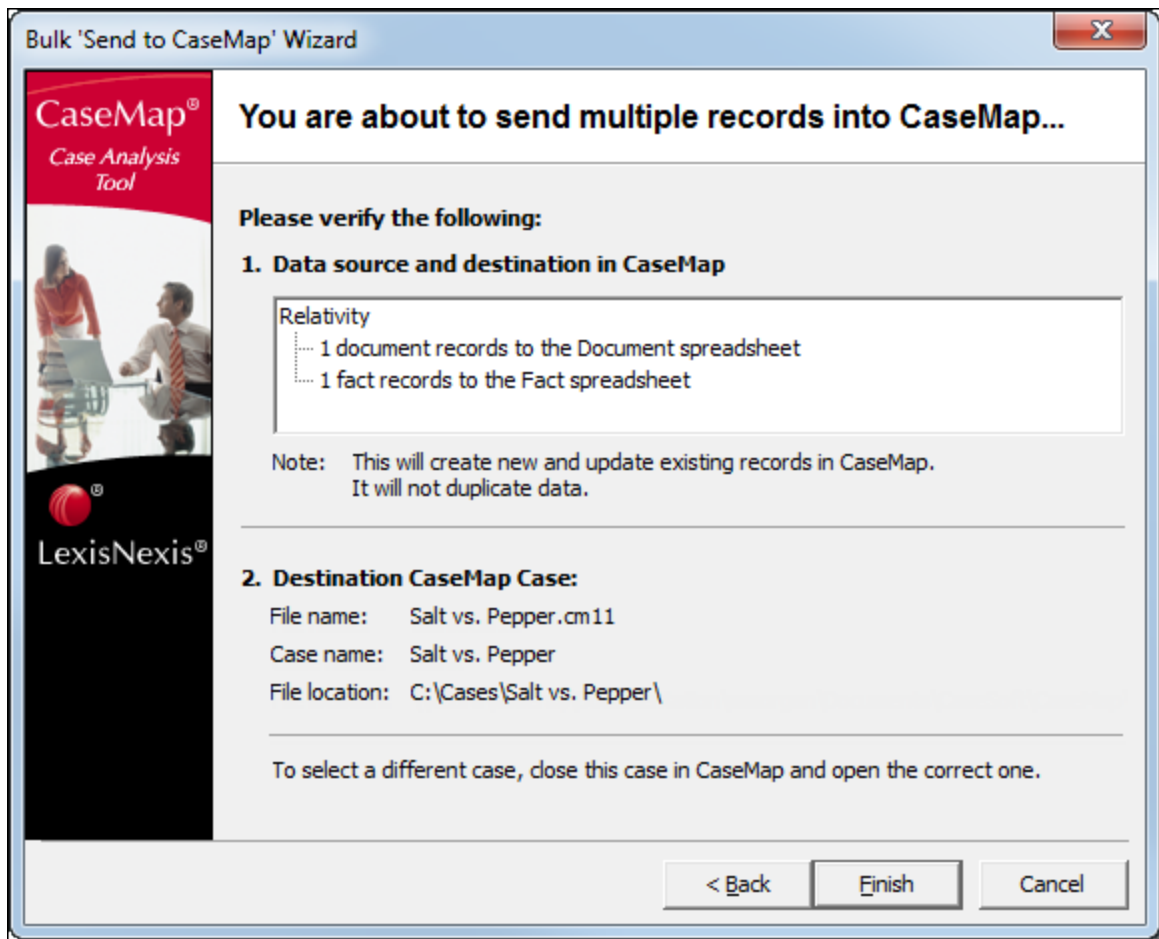


Note: If the **CaseMap > Add Fact** option does not display in the right-click menu, you may need to edit the value of the **HideCaseMapContextMenuOption** instance setting.

2. Open the .cmbulk file download from your browser to launch the **Bulk 'Send to CaseMap' Wizard**.
3. Click **Next** on the Welcome to the Bulk 'Send to CaseMap' Wizard dialog.



4. Click **Next** to confirm the destination CaseMap case.
5. Click **Finish** to send the fact text to CaseMap.



6. Click **OK** to confirm the number of records sent to CaseMap from Relativity.
7. Link the source document to CaseMap if you haven't yet done so. See [Linking a document to CaseMap on page 109](#).
8. Click **OK** to add the highlighted text as a fact.

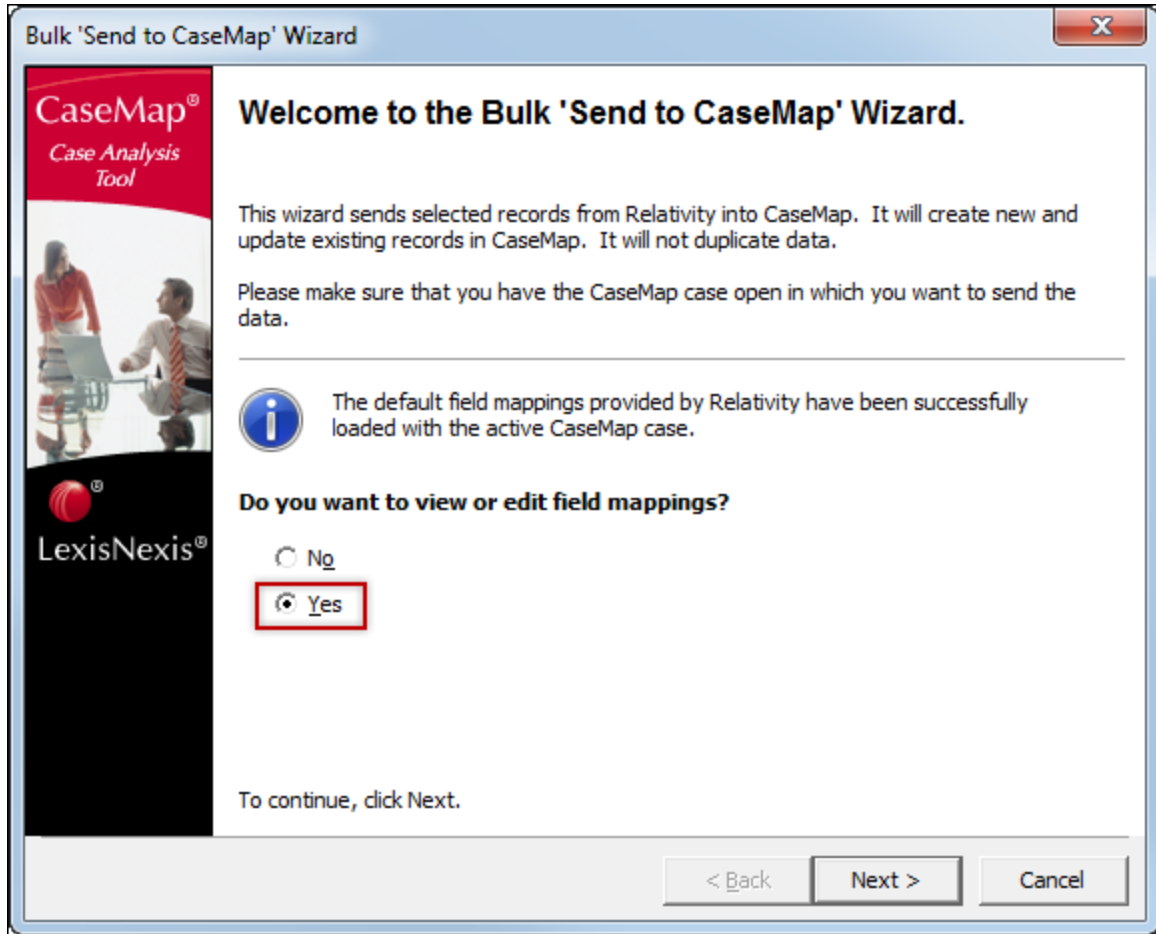
You can then see the new fact when you view your CaseMap.

9.10.3 Modifying field mapping for facts

If you edited your field mappings in a previous Add Fact operation, the Welcome dialog of the Bulk 'Send to CaseMap' wizard presents you with an option to view or edit your existing field mappings. To view and edit your field mappings from the wizard:

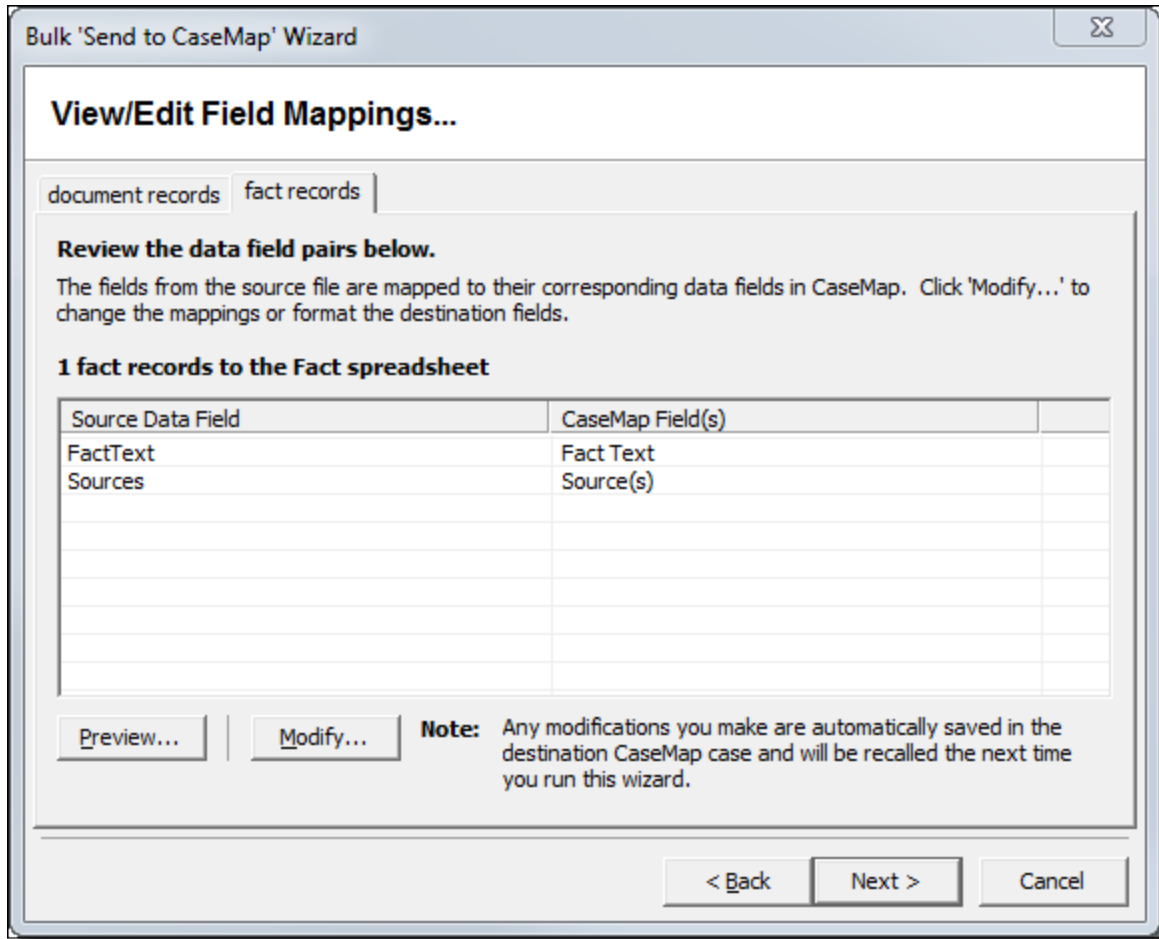
Note: The full range of Unicode characters is not supported by CaseMap.

1. Select the **Yes** radio button.



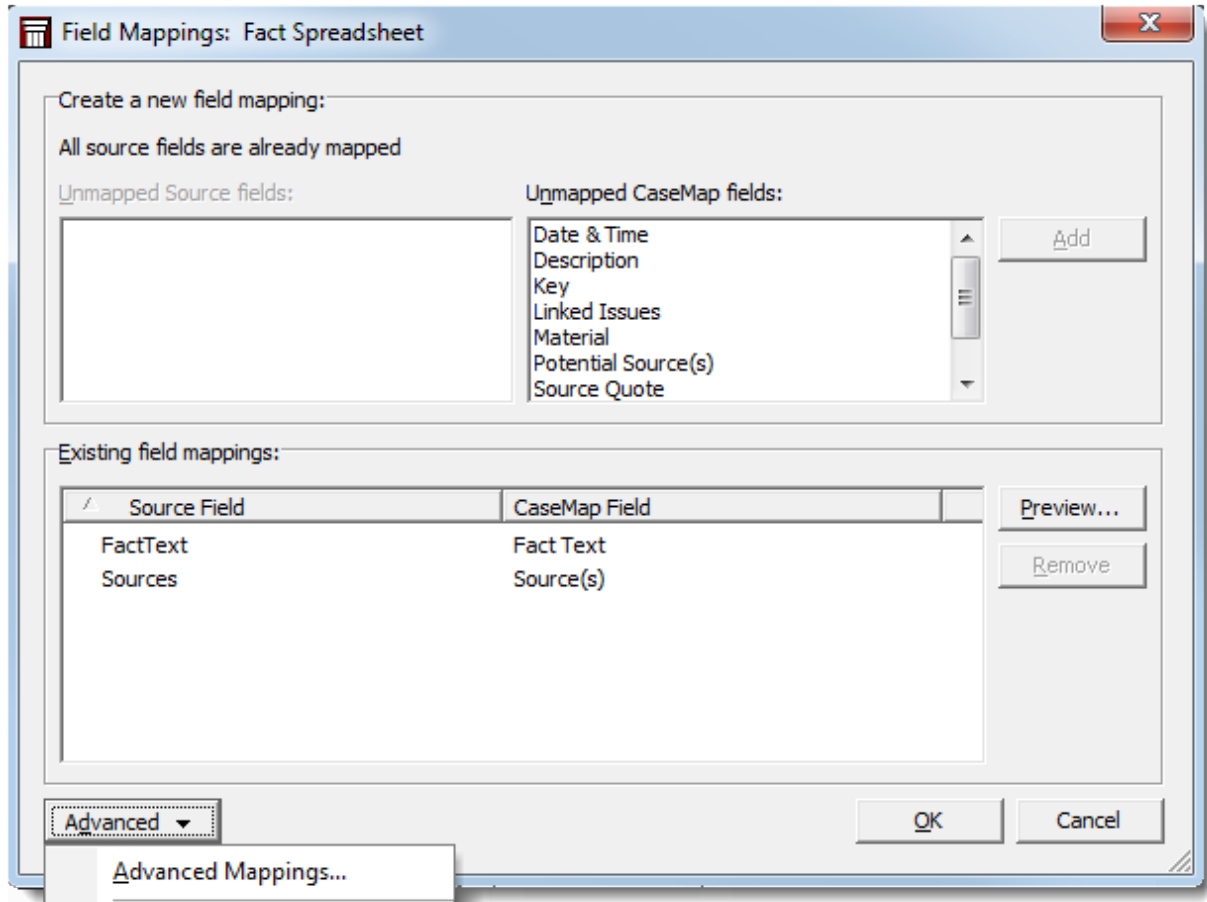
2. Click **Next**.
3. Click **Next** to confirm the Destination CaseMap Case.

4. Click **Modify** on the View/Edit Field Mappings dialog in the fact records tab.



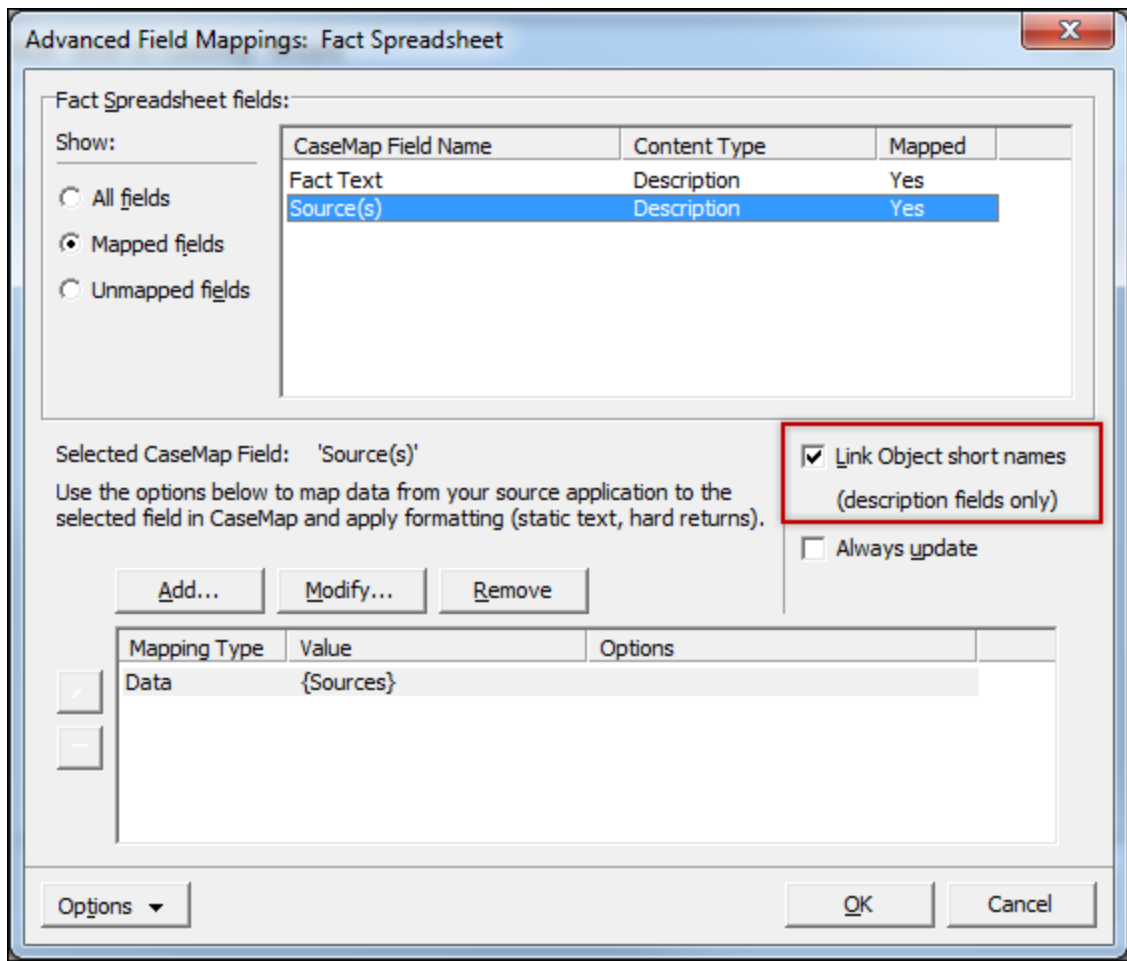
5. Map the source data fields to your CaseMap fields.
6. Click the **Advanced** drop down and select **Advanced Mappings**. The Advanced Field Mappings

Spreadsheet opens.

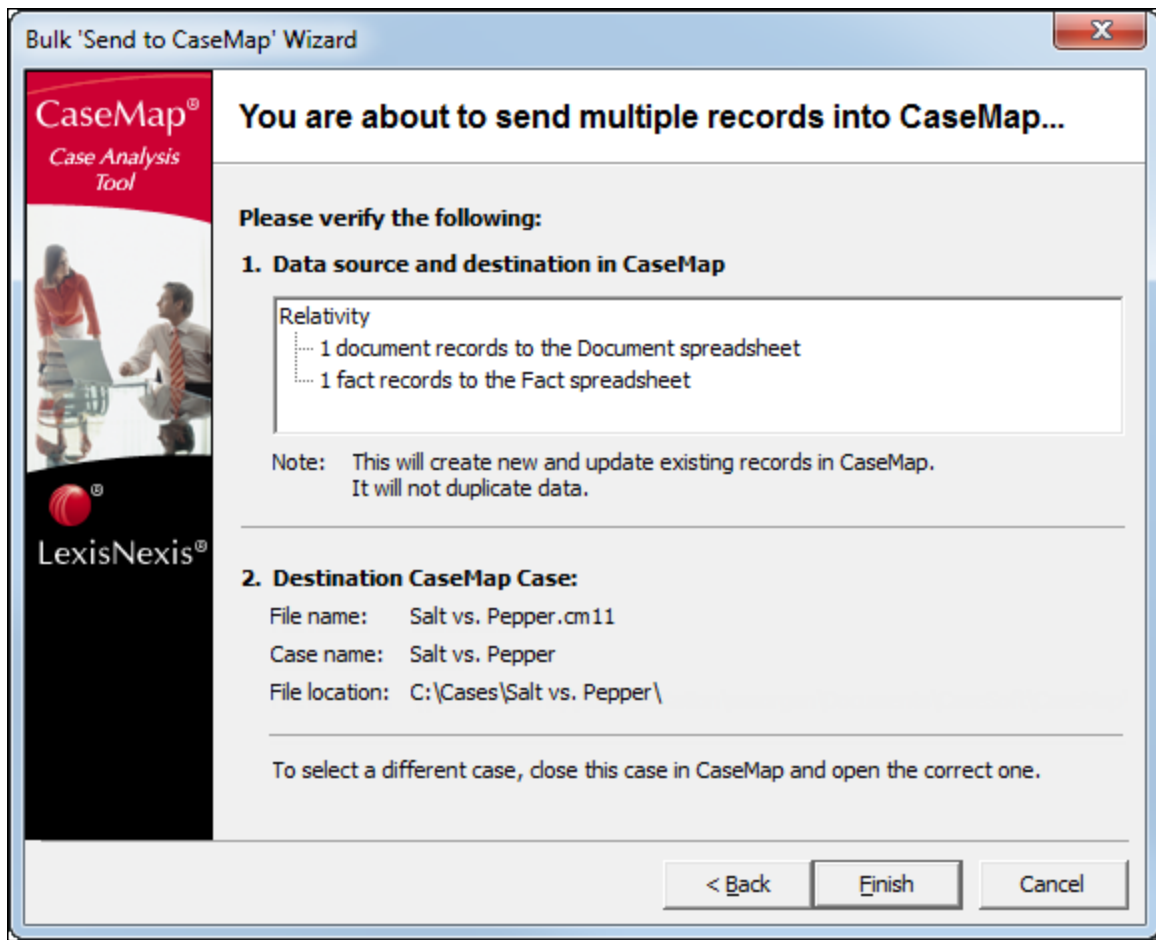


7. Ensure the **Mapped Fields** radio button is selected.
8. Select **Link Object short names (description fields only)**.

Note: Select this option only for the Source(s) field, not the Fact Text field.








9. Click **Yes**.
10. Click **Ok**.
11. Click **Ok** on the View/Edit Field Mappings dialog after mapping your fields.
12. Click **Next**.
13. Click **Finish**.





9.11 Document compare

You can use Document Compare to view the key differences between the extracted text of two documents. To access Document Compare, you must first add the Relativity Compare system field to a view. See Views in the Admin guide.

#	<input type="checkbox"/>		Control Number	Compare
976	<input type="checkbox"/>	Edit	JGRIFFITH_0000059	
977	<input type="checkbox"/>	Edit	JGRIFFITH_0000061	
978	<input type="checkbox"/>	Edit	JGRIFFITH_0000004	
979	<input type="checkbox"/>	Edit	JGRIFFITH_0000005	
980	<input type="checkbox"/>	Edit	JGRIFFITH_0000377	

To compare two documents in Relativity from the document list:

1. Click  to open the Document Compare selection window. By default the document identifier of the selected document populates the Document Compare window.
2. Click  by the With field to select a document with which to compare it. A Select Item pop-up window displays.

Note: You can change the value of either of the fields at any time while in the Document Compare window.

3. Select the desired document from the list and click **Set**. The Document Compare window displays the selected document in the With field.
4. Click **Compare**. The window displays the similarities and differences between the documents.
5. The similarities and differences between the documents are reflected in the legend at the bottom of the window:
 - **Inserted** - text appears in the "With" document but doesn't appear in the "Compare" document.
 - **Deleted** - text appears in the "Compare" document but doesn't appear in the "With" document.
 - **Unchanged** -text appears in both documents.

Document Compare

Compare: LKITCHEN_0000583 With: LKITCHEN_0000574 **Compare**

... Clear ... Clear

obligations with respect to a Transaction, including, without limitation, all amounts then otherwise payable hereunder, determined in a commercially reasonable manner.

"Event of Default" means with respect to a party (the "Defaulting Party") any of the following: (i) the failure by the Defaulting Party to make, when due, any payment required ~~hereunder~~, ~~hereunder~~ or ~~to provide credit support pursuant to Section 16, in each case~~ if such failure is not remedied within three days after notice of such failure is given to the Defaulting Party; (ii) any representation or warranty made by the Defaulting Party herein shall prove to have been false or misleading in any material respect; (iii) the breach by the Defaulting Party of any material covenant set forth herein other than the ~~obligation~~ ~~obligation~~ to make ~~payment~~ ~~payment~~ ~~[covenants set forth in item (i) above]~~ if such failure is not remedied within 30 days after notice of such failure is given to the Defaulting Party; (iv) the institution, with respect to the Defaulting Party, of a bankruptcy, reorganization, moratorium, liquidation or similar insolvency proceeding, or other relief under any bankruptcy or insolvency law affecting creditors' rights or a petition is presented or instituted for its winding-up or liquidation (a "Bankruptcy Event of Default"); (v) the Defaulting Party consolidates or amalgamates with, or merges into or with, or transfers substantially all of its assets to another entity and (a) the resulting entity fails to assume all of the obligations of the Defaulting Party hereunder or (b) the resulting entity's creditworthiness is materially weaker than that of the Defaulting Party; (vi) the Defaulting Party's failure to schedule the Daily Contract Quantity for a cumulative period of 45 or more days in a 12 month period in any one Transaction unless excused by Force Majeure or the other party's failure to perform its obligations hereunder (a "Scheduling Event of Default"); ~~for~~ ~~(vii)~~ or ~~(vii)~~ an event of default occurs (howsoever determined) under any transaction consummated under the Spot General Terms & Conditions (Gas) between Company and counterparty (the "Spot GTC"), if any, or any transaction consummated under Base Contract For Short-Term Sale and Purchase of Natural Gas (GISB Form) between Company and counterparty (the "GISB Contract"), if any, or any other transaction between Company and counterparty for the purchase or sale of natural ~~gas~~ ~~gas~~. ~~(viii) the guarantor of the Defaulting Party fails to perform any covenant set forth in any guaranty agreement provided pursuant to Section 16, any representation or warranty made by the guarantor in such guaranty agreement shall prove to have been false or misleading in any material respect, or the guarantor shall take or suffer any actions set forth in item (iv) above as applied to it, or (ix) the issuer of a letter of credit provided pursuant to Section 16 shall fail to comply with or perform its obligations under such letter of credit if such failure shall be continuing after the lapse of any applicable grace period, or shall disaffirm, disclaim, repudiate or reject, in whole or in part, or challenge the validity of, such letter of credit, or shall take or suffer any actions set forth in item (iv) above as applied to it, or such letter of credit shall expire or terminate, or shall fail or cease to be in full force and effect at any time during the term of the Transaction for which it is issued without having been replaced]~~.

4. Force Majeure. Except with respect to payment obligations, in the event either party is rendered unable, wholly or in part, by Force Majeure to carry out its obligations under a Transaction, it is agreed that upon such party's giving notice of such Force Majeure to the other party as soon as reasonably possible (to be confirmed in writing), the obligations of such party, to the extent they are affected by such event, shall be suspended from the inception and during the continuance of the Force Majeure. The cause of the Force Majeure shall be remedied with all reasonable dispatch by the party claiming same (the "Claiming Party"). No provision herein shall require or permit either party to schedule gas in excess of the Daily Contract Quantity or at points other than the Delivery Point(s).

Inserted Deleted Unchanged

To compare related document from within the Review Interface, the Relativity Compare field can be added to a relational view displayed in the Related Items pane. After adding the field to a view, you can click on



the Relativity Compare icon to open the Document Compare window. The document you select from the Related Items pane automatically populates in the With field, while the document open in the Viewer automatically populates the Compare field.

9.12 Viewer-supported file types

Relativity displays rendered versions of native files within the Viewer. Reviewers can see how the file looked in its native application without opening the file in that native application.

When converting email file types such as EML, the Viewer will not download images from the internet. Any linked images will display as a gray box in the Viewer.

This document provides a comprehensive list of files types supported by the Viewer. Find out which viewer version you have, by navigating to your Viewer and clicking



to display the version of the native file converter that converted the document when you opened it from the document list, the native document viewer version, and the latest installed version of the native document viewer. The icon is red if a version is out of date.

See the Admin guide for more information on the viewer.

Note: Relativity does not support any third-party applications after the user downloads a file. This includes specific browser and media-player combinations, such as Internet Explorer and Windows Media Player.

9.12.1 Text only designation

Some file types have a "text only" designation. When viewing these files in the viewer mode of the Relativity viewer, the document's text is the only data that renders. For Microsoft Project files and XML files, the view doesn't display items such as Gantt charts, icons, or other graphics. There is typically no formatting (bold, italics, fonts, etc.) of the text.

9.12.2 File ID only designation

Some file types have a "file ID only" designation. The viewer is able to identify the file ID correctly, but it returns an error message indicating that the file format is not supported. Despite returning an error message, the viewer identifies the file so that you can easily locate it and open it in an alternate application.

9.12.3 Supported File ID-only file types

The viewer supports file ID-only functionality the following native file types. The supported file types are listed by category.

Program/File Type	Category	Type/Version	File Extension
Microsoft Access Report Snapshot	Database	2000-2003	
IBM Lotus Notes NSF	Email	7.x, 8.x	
DICOM	Multimedia		
Flash	Multimedia	9, 10	
Real Media	Multimedia		
MPEG-1 Video V 2	Multimedia		.mpg
MPEG-1 Video V 3	Multimedia		.mpg
MPEG-2 Audio	Multimedia		.mpg
Windows Media Playlist	Multimedia		
AOL Messenger	Other		
Microsoft InfoPath	Other	2007	
Microsoft Office Theme files	Other	2007-2013	
Microsoft Windows Compiled Help	Other		.chm

Program/File Type	Category	Type/Version	File Extension
Microsoft Windows Explorer Command	Other		.scf
Microsoft Windows Help	Other		.hlp
Microsoft Windows Shortcut	Other		.ink
Trillian XML Log File	Other	4.2	
TrueType Font	Other		.ttf, .ttc
Strict Open XML - Presentation	Presentation	2013, 2016	
Adobe Photoshop PSD	Raster		
WebP	Raster		
Strict Open XML - Spreadsheet	Spreadsheet	2013, 2016	
XHTML	Text and Markup	1.0	
Visio XML VSX	Vector Image	2007	
Microsoft Publisher	Word Processing	2003-2007	
Samsung JungUm Global	Word Processing		
Strict Open XML - Document	Word Processing	2013, 2016	

9.12.4 Supported Text-only file types

The viewer supports text-only functionality the following native file types. The supported file types are listed by category.

Program/File Type	Category	Type/Version	File Extension
Microsoft Access	Database	1.0, 2.0, 95 - 2010	.accdb, .mdb
Flash	Multimedia	6.x, 7.x, Lite	.swf
Microsoft OneNote	Other	2007, 2010, 2013	.one
Microsoft Excel for Windows	Spreadsheet	2003 XML	.xml
XML	Text and markup		.xml
Microsoft XPS	Vector Image		
Visio	Vector Image	2013	
Lotus WordPro	Word processing	9.7, 96 - Millennium 9.8	.lwp, .mwp
Microsoft Word for Windows	Word Processing	2003 XML	

9.12.5 Supported file types

The viewer supports the following native file types. The supported file types are listed by category.

Program/File Type	Category	Type/Version	File Extension
7z Note: BZIP2 and split archives are not supported.	Archive		.7z
7z Self Extracting exe Note: BZIP2 and split archives are not supported.	Archive		.exe
LZA Self Extracting Compress	Archive		.lza
LZH Compress	Archive		.lzh
Microsoft Office Binder	Archive	95, 97	.obd
Microsoft Cabinet (CAB)	Archive		.cab
PKZip	Archive		.zip
RAR	Archive	1.5, 2.0, 2.9	.rar
UNIX Compress	Archive		.z
UNIX GZip	Archive		.gz
UNIX tar	Archive		.tar
Uuencode	Archive		.uue
Zip	Archive	PKZip, WinZip	.zip
DataEase	Database	4.x	.dba
DBase	Database	III, IV, V	.dbf
First Choice DB	Database	Through 3.0	.fol
Framework DB	Database	3.0	
Microsoft Access	Database	2007/2010	.accdb
Microsoft Works DB for DOS	Database	2.0	.wdb
Microsoft Works DB for Macintosh	Database	2.0	.wdb
Microsoft Works DB for Windows	Database	3.0, 4.0	.wdb
Microsoft Works DB for DOS	Database	1.0	.wdb
Paradox for DOS	Database	2.0 - 4.0	.db
Paradox for Windows	Database	1.0	.db
Q&A Database	Database	Through 2.0	.db
R:Base	Database	R:Base 5000, R:Base System V	.rb1, .rb2, .rb3
Reflex	Database	2.0	.rdx
SmartWare II DB	Database	1.02	.db

Program/File Type	Category	Type/Version	File Extension
Apple Mail Message (EMLX)	Email	2.0	.emlx
Encoded mail messages	Email	<ul style="list-style-type: none"> ■ MHT ■ Multi Part Alternative ■ Multi Part Digest ■ Multi Part Mixed ■ Multi Part News Group ■ Multi Part Signed ■ TNEF 	
EML with Digital Signature	Email	SMIME	.eml
<p>Note: .MSG files that have a password or are encrypted are not supported in the Viewer. These documents will not convert and will result in an "Encrypted documents are not supported. The document will not be converted." message.</p>			
IBM Lotus Notes Domino XML Language DXL	Email	8.5	.xml
IBM Lotus Notes NSF (Win32, Win64, Linux x86-32 and Oracle Solaris 32-bit only with Notes Client or Domino Server)	Email	8.x	.nsf. .ntf
MBOX Mailbox	Email	RFC 822	.mbox
<p>Note: Any MBOX file that is ingested into Relativity using the Relativity Desktop Client will display as an archive, regardless of how many messages it may have or what extension it might have. An MBOX file is characterized as a text file with the string "From<space>email address<space>date string". When a file of this nature is viewed in Relativity, it may appear to only show summaries of messages. Essentially, if that "from" line is at the top of the document, Relativity treats it as MBOX and displays it as an archive.</p>			
Microsoft Outlook (MSG)	Email	97 - 2013	.msg

Program/File Type	Category	Type/Version	File Extension
Microsoft Outlook (OST)	Email	97 - 2010, 2013	.ost
Microsoft Outlook (PST)	Email	97 - 2013	.pst
Microsoft Outlook Express (EML)	Email		.eml
Microsoft Outlook Forms Template (OFT)	Email	97 - 2013	.oft
Microsoft Outlook OLM for Mac	Email	2011	
Microsoft Outlook PST (Mac)	Email	2001	.pst
MSG with Digital Signature	Email	SMIME	.msg
<p>Note: .MSG files that have a password or are encrypted are not supported in the Viewer. If you open an .MSG file that is encrypted in the Viewer, the body of the document will be blank and the contents of the encrypted data is placed into a single attachment with a .p7m file extension.</p>			
Microsoft Live Messenger (via XML filter)	Other	10.0	
Microsoft Project (sheet view only, Gantt Chart, Network Diagram, and graph not supported)	Other	98-2013	.mpp
Microsoft Project (sheet view only, Gantt Chart, Network Diagram, and graph not supported)	Other	2007, 2010, 2013	.mpp
Microsoft Windows DLL	Other		.dll
Microsoft Windows Executable	Other		.dll
Trillian Text Log File (via text filter)	Other	4.2	.txt
vCalendar	Other	2.1	.vcs
vCard	Other	2.1	.vcf
Yahoo! Messenger	Other	6.x – 8	.yps
Apache Office Draw (ODF 1.2)	Presentation	3.x, 4.x	
Apache Office Impress (ODF 1.2)	Presentation	3.x, 4.x	
Apple iWork Keynote (MacOS, text and PDF preview)	Presentation	09	.key, .key-note
Harvard Graphics Presentation DOS	Presentation	3.0	.prs
IBM Lotus Symphony Presentations	Presentation	1.x	
Kingsoft WPS Presentation	Presentation	2010	
Libre Office Draw (ODF 1.2)	Presentation	3.x, 4.x	

Program/File Type	Category	Type/Version	File Extension
Libre Office Impress (ODF 1.2)	Presentation	3.x, 4.x	
Lotus Freelance	Presentation	1.0 - Millennium 9.8	.prz
Lotus Freelance for OS/3	Presentation	2	
Lotus Freelance for Windows	Presentation	95, 97, SmartSuite 9.8	
Microsoft PowerPoint for Macintosh	Presentation	4.0 - 2011	.ppt
Microsoft PowerPoint for Windows	Presentation	3.0 – 2013	.ppt
Microsoft PowerPoint 2016	Presentation	2016	.pptx
Microsoft PowerPoint for Windows Slideshow	Presentation	2007-2013	.ppt
Microsoft PowerPoint for Windows Template	Presentation	2007-2013	.pot
Novell Presentations	Presentation	3.0, 7.0	.shw
OpenOffice Impress	Presentation	1.1, 3.0	.sdd
Oracle Open Office Impress	Presentation	3.x	.odp
StarOffice Impress	Presentation	5.2 - 9.0	.sda, .sdd
WordPerfect Presentations	Presentation	5.1 - X5	
Adobe Photoshop	Raster image	4.0	.psd
Adobe Photoshop XMP only	Raster image	8.0 - 10.0 (CS 1-5)	
CALS Raster (GP4)	Raster image	Type I-II	.cg4, .cal
Computer Graphics Metafile	Raster image	ANSI, CALS, NIST	.cgm
Encapsulated PostScript (EPS)	Raster image	TIFF Header only	.eps
GEM Image (Bitmap)	Raster image		.bmp
Graphics Interchange Format (GIF)	Raster image		.gif
IBM Graphics Data Format (GDF)	Raster image	1.0	.gdf
IBM Picture Interchange Format	Raster image	1.0	.pif

Program/File Type	Category	Type/Version	File Extension
JBIG2	Raster image	Graphic Embeddings in PDF	
JFIF (JPEG not in TIFF format)	Raster image		.jif
JPEG	Raster image		.jpg
JPEG 2000	Raster image	JP2	
Kodak Flash Pix	Raster image		.fpx
Kodak Photo CD	Raster image	1.0	.pcd
Lotus PIC	Raster image		.pic
Lotus Snapshot	Raster image		
Macintosh PICT	Raster image	BMP only	.bmp
Macintosh PICT2	Raster image	BMP only	.bmp
MacPaint	Raster image		.pntg
Microsoft Windows Bitmap	Raster image		.bmp
Microsoft Windows Cursor	Raster image		
Microsoft Windows Icon	Raster image		.ico
OS/2 Bitmap	Raster image		
OS/2 Warp Bitmap	Raster image		
Paint Shop Pro (Win32 only)	Raster image	5.0, 6.0	.psp
PC Paintbrush (PCX)	Raster image		.pcx

Program/File Type	Category	Type/Version	File Extension
PC Paintbrush DCX (multi-page PCX)	Raster image		.dcm
Portable Bitmap (PBM)	Raster image		.pbm
Portable Graymap PGM	Raster image		.pgm
Portable Network Graphics (PNG)	Raster image		.png
Portable Pixmap (PPM)	Raster image		.ppm
Progressive JPEG	Raster image		.jpg, .jpeg, .jpe
StarOffice Draw	Raster image	6.x - 9.0	
Sun Raster	Raster image		.srs
TIFF	Raster image	Group 5 & 6	.tif, .tiff
TIFF CCITT	Raster image	Group 3 & 4	
TruVision TGA (Targa)	Raster image	2.0	.tga
WBMP wireless graphics format	Raster image		
Word Perfect Graphics	Raster image	1.0	.wpg
WordPerfect Graphics	Raster image	2.0 – 10.0	.wpg, .wpg2
X-Windows Bitmap	Raster image	x10 compatible	.xbm
X-Windows Dump	Raster image	x10 compatible	.xdm
X-Windows Pixmap	Raster image	x10 compatible	.xpm
Apache Office Calc (ODF 1.2)	Spreadsheet	3.x, 4.x	

Program/File Type	Category	Type/Version	File Extension
Apple iWork Numbers (MacOS, text, and PDF preview)	Spreadsheet	09	.numbers
Enable Spreadsheet	Spreadsheet	3.0 - 4.5	
First Choice SS	Spreadsheet	Through 3.0	
Framework SS	Spreadsheet	3.0	
IBM Lotus Symphony Spreadsheets	Spreadsheet	1.x	
Kingsoft WPS Spreadsheets	Spreadsheet	2010	
Libre Office Calc (ODF 1.2)	Spreadsheet	3.x, 4.x	
Lotus 1-2-3	Spreadsheet	Through Millennium 9.8	.wk1, .wk3, .wk4, .wks
Lotus 1-2-3 Charts (DOS and Windows)	Spreadsheet	Through 5.0	.wk1, .wk3, .wk4, .wks
Lotus 1-2-3 for OS/2	Spreadsheet	2.0	
Microsoft Excel Charts	Spreadsheet	2.x - 2007	.xlsx, .xls
Microsoft Excel for Macintosh	Spreadsheet	98 – 2011	.xlsx, .xls
Microsoft Excel for Windows	Spreadsheet	3.0 - 2016	.xlsx, .xls
<p>Note: Excel files with slicers will convert and display normally in the Viewer, but slicer elements in those files will not display.</p>			
Microsoft Excel for Windows (.xlsb)	Spreadsheet	2007-2013 (Binary)	.xlsb
Microsoft Works SS for DOS	Spreadsheet	2.0	.wks
Microsoft Works SS for Macintosh	Spreadsheet	2.0	.wks
Microsoft Works SS for Windows	Spreadsheet	3.0, 4.0	.wks
Multiplan	Spreadsheet	4.0	.sylk
Novell PerfectWorks Spreadsheet	Spreadsheet	2.0	.wpw
OpenOffice Calc	Spreadsheet	1.1-3.0	.sdc
Oracle Open Office Calc	Spreasheet	3.x	.sdc
Office Calc (ODF 1.2)	Spreadsheet	4.x	
PFS: Plan	Spreadsheet	1.0	
QuattroPro for DOS	Spreadsheet	Through 5.0	.wb1
QuattroPro for Windows	Spreadsheet	Through X5	.qpw, .wb3,

Program/File Type	Category	Type/Version	File Extension
			.wb2, .wb1
Quattro Pro Win	Spreadsheet	X7	.qpw
SmartWare II SS	Spreadsheet	1.02	.def
SmartWare Spreadsheet	Spreadsheet		.def
StarOffice Calc	Spreadsheet	5.2 – 9.0	.sdc
SuperCalc	Spreadsheet	5.0	.cal
Symphony	Spreadsheet	Through 2.0	.wrk
VP-Planner	Spreadsheet	1.0	
ANSI Text	Text and markup	7 & 8 bit	.ans
ASCII Text	Text and markup	7 & 8 bit	.asc
DOS character set	Text and markup		
EBCDIC	Text and markup		
HTML (CSS rendering not supported)	Text and markup	1.0 – 4.0	.html
IBM DCA/RFT	Text and markup		
Macintosh character set	Text and markup		
Rich Text Format (RTF)	Text and markup		.rtf
Unicode Text	Text and markup	3.0, 4.0	.txt
UTF-8	Text and markup		
Wireless Markup Language	Text and markup		.wml
Adobe Illustrator	Vector image	4.0 – 7.0, 9.0	
Adobe Illustrator (PDF Preview only)	Vector image	9.0, CS1-6	.pdf

Program/File Type	Category	Type/Version	File Extension
Adobe Illustrator XMP	Vector image	11 – 13 (CS 1 - 5)	
Adobe InDesign XMP	Vector image	3.0 – 5.0 (CS 1 - 5)	
Adobe InDesign Interchange XMP only	Vector image		
Adobe PDF	Vector image	1.0 – 1.7 (Acrobat 1 - 10)	.pdf
Adobe PDF Package	Vector image	1.7 (Acrobat 8 - 10)	.pdf
Adobe PDF Portfolio	Vector image	1.7 (Acrobat 8 - 10)	.pdf
Ami Draw	Vector image	SDW	.sdw
Apple iWork Keynote File Preview	Vector	09	.key, .key-note
Apple iWork Keynote Numbers File Preview	Vector	09	.numbers
Apple iWork Pages File Preview	Vector	09	.pages
AutoCAD Drawing	Vector image	2.5, 2.6, 9.0-14.0, 2000i - 2012	.dwg
AutoCAD Drawing	Vector	2013	.dwg
AutoShade Rendering	Vector image	2	.rnd
Corel Draw	Vector image	X4 - X7	.cdr
Corel Draw Clipart	Vector image	5.0, 7.0	.cmx
Enhanced Metafile (EMF)	Vector image		.emf
Escher Graphics	Vector image		.egr
FrameMaker Graphics (FMV)	Vector image	3.0 – 5.0	.fmv

Program/File Type	Category	Type/Version	File Extension
Gem File (Vector)	Vector image		.img
Harvard Graphics	Vector	98	.cht
Harvard Graphics Chart DOS	Vector image	2.0 – 3.0	.ch3
Harvard Graphics for Windows	Vector image		.prs
HP Graphics Language	Vector image	2.0	.hp, .hpg
IGES Drawing	Vector image	5.1 – 5.3	.iges
Micrografx Designer	Vector image	Version 6	.dsf
Micrografx Designer	Vector image	Through 3.1	.drw
Micrografx Draw	Vector image	Through 4.0	.drw
Novell PerfectWorks Draw	Vector image	2.0	
OpenOffice Draw	Vector image	1.1 – 3.0	.sda
Oracle Open Office Draw	Vector image	3.x	.sda
SVG (processed as XML, not rendered)	Vector image		.xml
Microsoft Visio: <ul style="list-style-type: none"> ■ Stencil ■ Template ■ Macro Enabled Drawing ■ Macro Enabled Stencil ■ Macro Enabled Template 	Vector image	5.0 – 2007, 2013	.vsd
Visio (Page Preview mode WMF/EMF)	Vector image	4.0	.wmf, .emf
Windows Metafile	Vector image		.vmf

Program/File Type	Category	Type/Version	File Extension
Adobe FrameMaker (MIF only)	Word processing	3.0 - 6.0	.mif
Adobe Illustrator Postscript	Word processing	Level 2	.eps
Ami	Word processing		
Ami Pro for OS2	Word processing		.sam
Ami Pro for Windows	Word processing	2.0, 3.0	.sam
Apache Office Writer (ODF 1.2)	Word processor	3.x, 4.x	
Apple iWork Pages (MacOS, text and PDF preview)	Word processing	09	.pages
DEC DX	Word processing	Through 4.0	.dx
DEC DX Plus	Word processing	4.0, 4.1	.dx, .wpl
Enable Word Processor	Word processing	3.0 - 4.5	
First Choice WP	Word processing	1.0, 3.0	.pfx
Framework WP	Word processing	3.0	
Hangul	Word processing	97 - 2010	.hwp
IBM DCA/FFT	Word processing		.dca, .fft
IBM DisplayWrite	Word processing	2.0-5.0	.rft, .dca
IBM Writing Assistant	Word processing	1.01	.iwa
Ichitaro	Word processing	5.0, 6.0, 8.0 - 13.x, 2004 - 2014	.jtd
JustWrite	Word pro-	Through 3.0	.jw

Program/File Type	Category	Type/Version	File Extension
	cessing		
Kingsoft WPS Writer	Word processing	2010	.wps
Legacy	Word processing	1.1	.leg
Libre Office Writer (ODF 1.2)	Word processor	3.x, 4.x	
Lotus Manuscript	Word processing	Through 2.0	.manu
MacWrite II	Word processing	1.1	.mcw
Mail Rule DXL	Word processing		
Mass 11	Word processing	Through 8.0	.m11
Microsoft Word for DOS	Word processing	4.0 – 6.0	.doc
Microsoft Word for Macintosh	Word processing	4.0-6.0, 98 - 2016	.doc
Microsoft Word for Windows	Word processing	1.0 – 2016	.doc, .docx
Microsoft WordPad	Word processing		.rtf
Microsoft Works WP for DOS	Word processing	2.0	.wps
Microsoft Works WP for Macintosh	Word processing	2.0	.wps
Microsoft Works WP for Windows	Word processing	3.0, 4.0	.wps
Microsoft Write for Windows	Word processing	1.0 – 3.0	.wri
MultiMate	Word processing	Through 4.0	.dox
MultiMate Advantage	Word processing	2.0	.dox
Navy DIF	Word pro-		.dif

Program/File Type	Category	Type/Version	File Extension
	cessing		
Nota Bene	Word processing	3.0	.nb
Novell PerfectWorks Word Processor	Word processing	2.0	.wpw
OfficeWriter	Word processing	4.0-6.0	
OpenOffice Writer	Word processing	1.1 - 3.0	.sdw
Oracle Open Office Writer	Word processing	3.x	.sdw
PC File Doc	Word processing	5.0	
PFS: Write	Word processing	A, B	.pfs
Professional Write for DOS	Word processing	1.0, 2.0	
Professional Write Plus for Windows	Word processing	1.0	
Q&A Write	Word processing	2.0, 3.0	.jw
Samna Word IV	Word processing	1.0 – 3.0	.sam
Samna Word IV+	Word processing		.sam
Signature	Word processing	1.0	
SmartWare II WP	Word processing	1.02	.def
Sprint	Word processing	1.0	.spr
StarOffice Writer	Word processing	5.2 – 9.0	.sdw
Total Word	Word processing	1.2	
Wang IWP	Word pro-	Through 2.6	.iwp


Program/File Type	Category	Type/Version	File Extension
	cessing		
WordMarc Composer	Word processing		
WordMarc Composer+	Word processing		
WordMarc Word Processor	Word processing		
WordPerfect for DOS	Word processing	4.2	.wpd
WordPerfect for Macintosh	Word processing	1.02 - 3.1	.wpd
WordPerfect for Windows	Word processing	5.1 – X5	.wpd
Wordstar 2000 for DOS	Word processing	1.0 - 3.0	.wsd
Wordstar for DOS	Word processing	3.0 - 7.0	(none defined)
Wordstar for Windows	Word processing	1.0	.ws1
XyWrite	Word processing	Through III+	.xy

Note: Program/file types listed with text only or PDF preview only can be reviewed in the viewer as listed. If PDF preview only, a PDF file saved as part of the native will be viewed. Text only will just display the text without any formatting.

9.12.6 Viewer audio and video-supported file types

Relativity can stream audio and video files within the Viewer.

This document provides a comprehensive list of files types supported by the Viewer. The file type compatibility depends on the internet browser that you use. Find out which viewer version you have, by

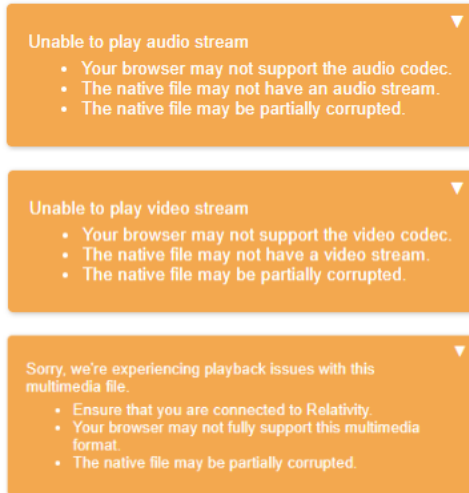
navigating to your viewer and clicking  to display the version of the native file converter that converted the document when you opened it from the document list, the native document viewer version, and the latest installed version of the native document viewer. The icon is red if a version is out of date.

See the Admin guide for more information on the Viewer.

Note: Relativity does not support any third-party applications after the user downloads a file. This includes specific browser and media-player combinations, such as Internet Explorer and Windows Media Player.

9.12.7 Troubleshooting errors

If an audio or video file cannot be streamed in the Viewer, one of the following messages will display:



To resolve the error, ensure that your internet browser can play the selected file type. If that does not resolve the error, check the **MaximumNativeSizeForViewerForMediaFilesinMegaBytes** instance setting to ensure that the file type is not too big for the Viewer to stream.

9.12.8 Supported audio file types

Note: Safari works with Mac OSX only.

File Format	Container - Audio Codec	Chrome	Firefox	Internet Explorer	Safari
FI_RIFFWAVE	wave - pcm	√	√	√	
Quicktime Movie	mov - aac	√	√	√	√
Quicktime Movie	mov - vorbis	√			
MPEG Layer3 ID3 Ver 1.x	mp3 - mp3	√	√	√	
MPEG Layer3 ID3 Ver 2.x	mp3 - mp3	√	√	√	√
FI_MPGAV2L3	mp3 - mp3	√	√	√	
MPEG-4 file	mp4 - aac	√	√	√	√
MPEG-4 file	mp4 - opus	√			
MPEG-4 file	mp4 - vorbis	√			

9.12.9 Supported video file types

Note: Safari works with Mac OSX only.

File Format	Container - Video Codec - Audio Codec	Chrome	Firefox	Internet Explorer	Safari
Quicktime Movie	mov - h264 - aac	√	√	√	
Quicktime Movie	mov - h264 - dolby_digital	√	√		
Quicktime Movie	mov - h264 - mp2	√	Video-only		
Quicktime Movie	mov - h264 - mp3	√	√		√
Quicktime Movie	mov - h264 - vorbis	√	√		
Quicktime Movie	mov - h264 - wma1	√	√		
Quicktime Movie	mov - h264 - wma2	√	√		
Quicktime Movie	mov - mpeg4 - aac	Audio-only	Audio-only		√
Quicktime Movie	mov - mpeg4 - mp3	Audio-only	Audio-only		
Quicktime Movie	mov - mpeg4 - vorbis	Audio-only			√
Quicktime Movie	mov - theora - aac	√	Audio-only		
Quicktime Movie	mov - theora - dolby_digital	√			
Quicktime Movie	mov - theora - mp2	√			
Quicktime Movie	mov - theora - mp3	√	Audio-only		
Quicktime Movie	mov - theora - vorbis	√			
Quicktime Movie	mov - theora - wma1	√			

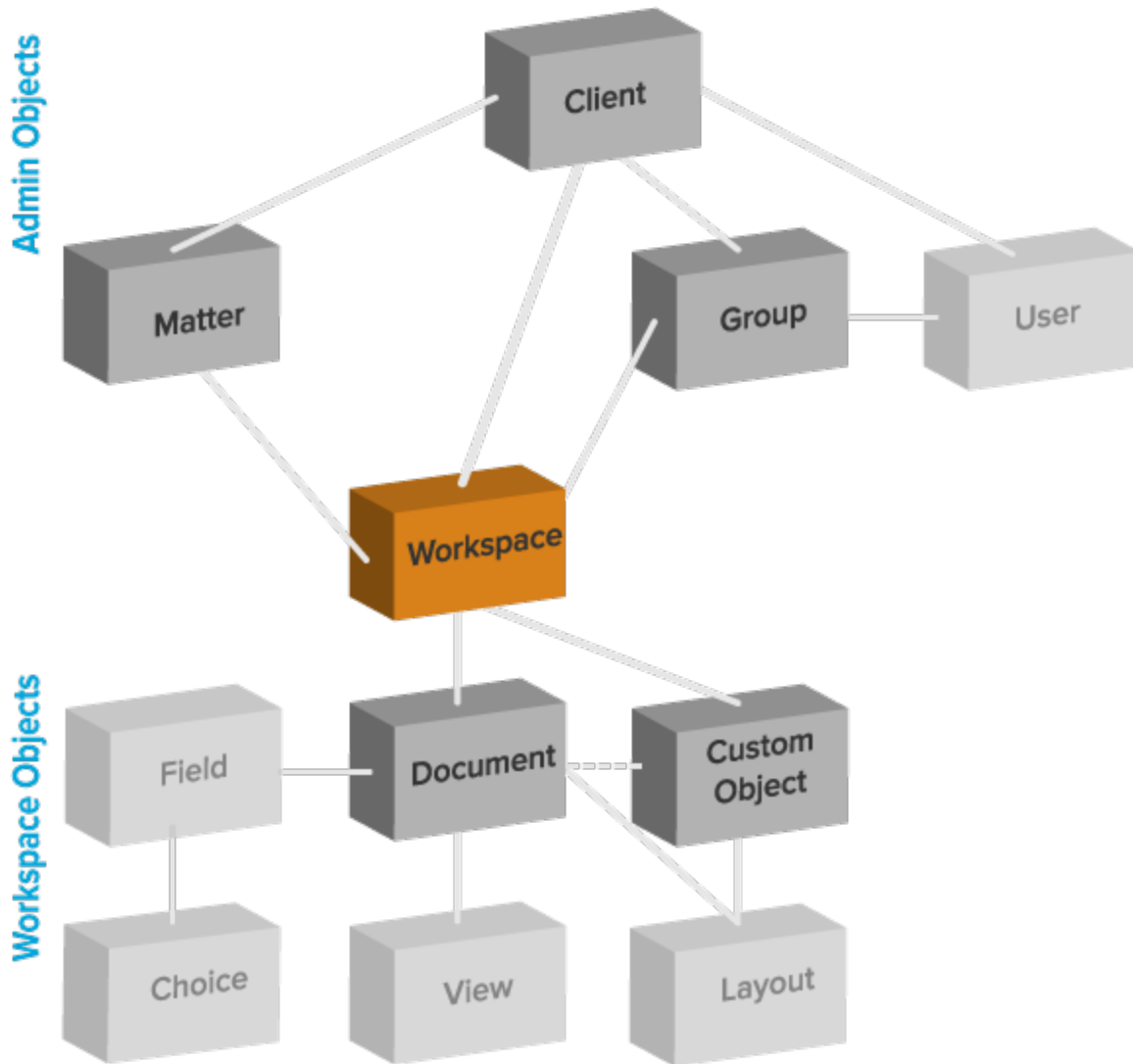
File Format	Container - Video Codec - Audio Codec	Chrome	Firefox	Internet Explorer	Safari
Quicktime Movie	mov - theora - wma2	√			
MPEG-4 file	mp4 - h264 - aac	√	√	√	
MPEG-4 file	mp4 - h264 - dolby_digital	√	√		√
MPEG-4 file	mp4 - h264 - mp2	√	√		√
MPEG-4 file	mp4 - h264 - mp3	√	√	√	√
MPEG-4 file	mp4 - h264 - opus	√			√
MPEG-4 file	mp4 - h264 - vorbis	√	√		√
MPEG-4 file	mp4 - mpeg4 - aac	Audio-only			√
MPEG-4 file	mp4 - mpeg4 - mp2	Audio-only	Audio-only		√
MPEG-4 file	mp4 - mpeg4 - mp3	Audio-only	Audio-only		√
MPEG-4 file	mp4 - mpeg4 - opus	Audio-only			√
MPEG-4 file	mp4 - mpeg4 - vorbis	Audio-only			√
MPEG-4 file	mp4 - vp9 - aac	√	√		
MPEG-4 file	mp4 - vp9 - dolby_digital	Audio-only	Audio-only		
MPEG-4 file	mp4 - vp9 - mp2	√	√		
MPEG-4 file	mp4 - vp9 - mp3	√	√		
MPEG-4 file	mp4 - vp9 - opus	√			
MPEG-4 file	mp4 - vp9 - vorbis	√	√		

10 Workspaces

In Relativity, a workspace provides a secure data repository for documents used in cases or for applications developed with Dynamic Objects. You can store all types of documents (such as productions, witness testimony, and so on) in a workspace to facilitate searching, organizing, and categorizing content. In addition, you can use granular security settings to grant or deny permissions to specific content stored in the workspace.

At the workspace level, you can also define views, layouts, fields, and choices. These Relativity features streamline workflows, as well as simplify the processes for organizing and categorizing content. Views support filtering on item lists, while layouts, fields, and choices are used for categorizing documents.


Relativity Framework



- [Adding workspaces to a client domain on page 141](#)

Also see this related recipe:

- [Multi-matter workspace setup in Relativity](#)

- **Client** - the name of this workspace's client object. Click  to select a client. When you select a client you are making this workspace a child object of that client object. The Select Client pop-up displays a list of clients based on the conditions set in the ClientsOnPicker view.

- **Resource Pool** - a set of servers and file repositories that you can associate with a workspace. Contact your system admin for information about available resource pools. Your selected resource pool determines the file repositories and SQL Servers available in the drop-down menus. See the AdminGuide for configuration information.

The screenshot shows the Relativity 9 Workspace Admin interface. The main content area is divided into several sections:

- Workspace Information:**
 - Name: Relativity 9
 - Client Name: Relativity Template
 - Matter Name: Relativity Template
 - Status: Active
 - SQL Full Text Language: English
 - Client Number: 0001
 - Matter Number: 0001
 - Production Restrictions: Produced Documents
 - Workspace Admin Group:
- Resource Information:**
 - Resource Pool: Default
 - Default File Repository: \\ML17.testing.corp\FileShare\
 - Default Cache Location: \\ML17.testing.corp\FileShare\cache
 - Database Location: ML17
 - Download Handler URL: Relativity.Distributed
- Other:**
 - Keywords:
 - Notes:
- Record History:**
 - Created: Smith, Jane - 9/29/2014 3:05:41 PM CDT
 - Last Modified: Smith, Jane - 10/10/2014 5:23:21 PM CDT

On the right side, there is a sidebar titled **RELATIVITY UTILITIES** with the following sections:

- System Settings:**
 - Manage Workspace Permissions
 - Manage System Keyboard Shortcuts
 - View Another User's Personal Items
- Relativity Downloads:**
 - Viewer Installation Kit
 - Relativity Desktop Client (32-bit)
 - Relativity Desktop Client (64-bit)

10.0.1 Relativity Downloads

In the Relativity Downloads section, click any link to download the corresponding component.

- **Viewer Installation Kit** - download a standalone utility containing executable files used to install the viewer software.
- **Relativity Desktop Client 32-bit** - displays a pop-up for saving or running this utility.
- **Relativity Desktop Client 64-bit** - displays a pop-up for saving or running this utility.

Note: To use these buttons, you must have the security permission for the Admin Operation called **Download Relativity Desktop Client**.

10.0.2 Re-run Event Handlers

The console includes the following button for rerunning event handlers:

- **Re-run Event Handlers** - executes Post Workspace Create event handlers that failed to complete properly. The Workspace Details page displays this button and an error message at the top of the page only when Post Workspace Create event handlers have failed. If the Post Workspace Create event handlers continue to fail, contact Client Services team (support@relativity.com).


Note: For additional information, see Post Workspace Create event handlers on the Relativity 10 Developers site.

Note: You must have permissions to the documents included in a production to remove production restrictions.

10.1 Workspace admin group

A system admin can assign any group in Relativity to have full admin rights over a particular workspace. A workspace admin has full control over all objects within the workspace, but members of the group do not have the script permissions available only to system admins.

Use the following steps to set a designate a workspace admin group:

1. Click **Edit** on the **Workspace Details** tab.
2. Click  in the **Workspace Admin Group** field.
3. Click the radio button next to the group you want to set as the workspace admin group.
4. Click **Ok**.

Note: You can only designate one group per workspace as a workspace admin group.

10.2 Adding workspaces to a client domain


You can add or remove objects from client domains if you have the client domains feature activated.

Note: This feature was formerly referred to as multi-tenancy in versions of Relativity previous to 9.5.162.111.

Note: Migrating a workspace that contains published data to a resource pool associated with a different worker manager server results in the loss of all references to previously published data.

Note: Once you add a workspace to a client domain, you can't remove it from the client domain.

Use the following steps to add a workspace to a client domain:

1. Navigate to the **Workspace Details** tab.
2. Click **Edit**.
3. Click  next to the **Client Name** field in the **Workspace Information** section of the **Workspace Details** tab.
4. Select the client with client domains enabled from the list.
5. A warning message requires you to confirm your decision by clicking **Save**.
6. Click **Save**.

7. You must select a new **Matter**, **Resource Pool**, **Default File Repository**, and **Default Cache Location** for the workspace once you move it into a client domain.

Note: Any groups that are part of a template workspace will also be a part of the client domain workspace. These non client domain groups should be removed to prevent the client domain admin from seeing information on non-client domain users and groups.

10.3 Workspace navigation

The workspace has several key areas that are important to understand as a Relativity user.

Also see this related recipe:

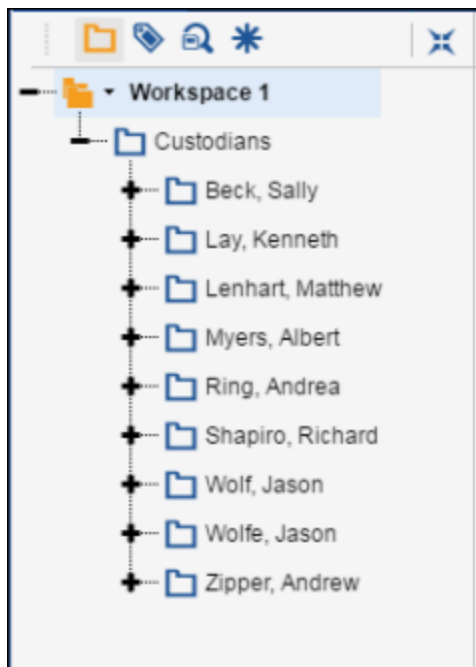
10.3.1 Browser panel



The browser is located on the left side of the workspace. Depending on your permissions, you may not see the browser. If you don't have a browser in your workspace, you can skip this section.

If you can see the browser, it may contain the following options for browsing through your documents:

- Folders
- Field Tree
- Saved Searches
- Clusters





No matter which of these options you use, there are several display options you can use to customize your workspace.



The browser opens by default. Hide or show the browser by using the arrow icon in the upper left of the browser. Clicking  closes the browser. Reopen the browser by clicking . You can also resize the browser by hovering over the line separating the panel from the other panel or item list until the line is highlighted. You may then click and drag the line to the desired dimensions.

10.3.1.1 Browser options

The browser menu is located directly below the browser. Click on one of the menu's options to display that mode of the browser:

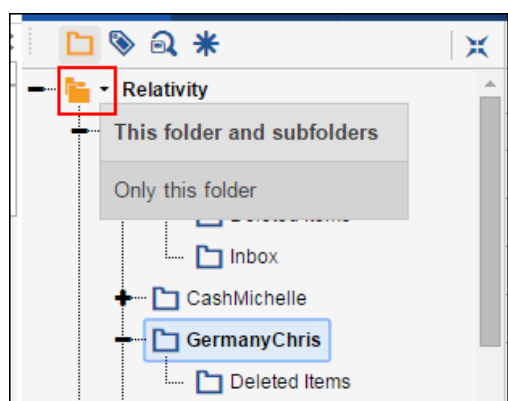
Icon	Name	Description
	Folder browser	Navigate the folder hierarchy for your workspace
	Field Tree browser	Browse your documents according to how they were coded or grouped
	Saved Searches browser	Create a new search, or browse previously saved searches. See Saved Search in the Searching Guide.
	Clusters browser	Browse your workspace clusters, which are groupings of conceptually correlated documents. See Clustering in the Analytics Guide. You must have Relativity Analytics to use the cluster browser and define clusters in your workspace. See the Analytics Guide.

Folder browser

Click on the folder icon to navigate the folder hierarchy for your workspace. The folder structure is set when documents are imported. It can be based on the document's source, or according to a folder structure set by your Relativity administrator. Clicking on a folder displays that folder's documents in the item list.

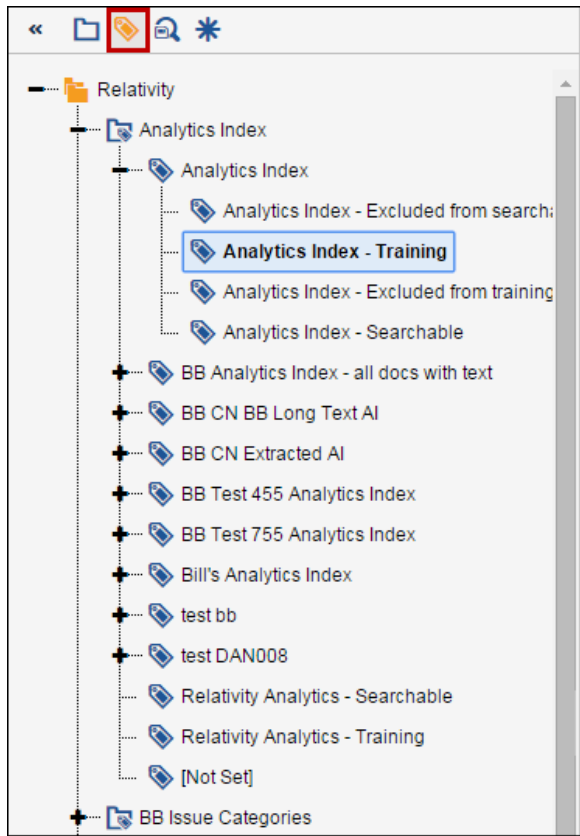
A folder often has multiple subfolders. You can view the subfolders with the expand (+) button to the left of the desired folder. Once the subfolders expand, you can use the collapse (-) button to collapse them back into their root folder.

To change the folder scope (Only this folder or This folder and subfolders), click the orange folder icon in the Folder browser, and then select either **This folder and subfolders** or **Only this folder** from the drop-down list.



Field tree browser

Clicking on the field tree icon displays the field tree in the browser. Selected single- and multiple-choice list fields and their choices appear in a tree structure.

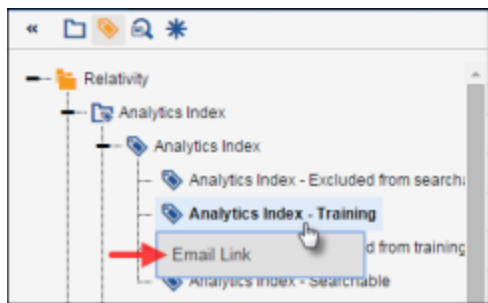


Each single and multiple-choice field has its own choice folder in the field tree. The field's choices appear as subfolders. Each field also has a [Not Set] choice, which displays null values for the field.

You can click on a choice in the field tree to display all the documents in the item list manager that have the selected choice value AND meet the criteria of the active view. In the item list, click this icon to send a link to the documents currently displayed in it.

Sending email links to choices

You can send an email message with a link to a choice, a choice folder, or the item list that appears when the field tree browser is open. In the field tree browser, right-click on a choice (or a choice folder) to display the **E-mail Link** option. Click this option on a choice to open an email message containing a link to it.



The subject line of the email message pre-populates with the following text: "Relativity Review -





<Workspace Name> - <Choice Name: Value>." When the recipient clicks on the link, the documents associated with the choice appear in the item list manager. Relativity displays a permissions denied message if the recipient clicks the link but doesn't have access rights on the field associated with the choice.

Note: If you send an email link to a choice folder, the subject line displays the folder name instead of the choice name and the value. The item list manager displays all documents associated with the choices in the folder. Recipients must have access rights to fields associated with the choice folder.

10.3.2 View bar

The view bar consists of the following elements:








- **Show current path icon** () - view the current folder browser location for the displayed document list.
- **Views drop-down menu** - select a view.
 - **Edit view icon**  - edit a view that displays within the view drop-down menu. This will only be present if you have permission to edit the view. If it's not present, contact your Relativity administrator to edit the current view.
 - **Create view icon**  - create a new view from within the view drop-down menu. This will only be present if you have permission to add a new view. If it is not present, contact your Relativity administrator to add a view.
- **Include Related Items drop-down menu** - returns documents related to the documents currently in the view. The options vary by workspace, but may include email family groups, duplicates, or similar documents. Learn more about related items in the [Related items pane on page 102](#) section of this document.
- **Add Widget** - add a custom widget to your document list dashboard (e.g., pivot chart, list, grid, or cluster visualization).
- **Dashboard drop-down** - select a custom dashboard to view in your document list. See Dashboards in the Navigation section of the Admin Guide for more information.
- **Export drop-down button** - you can select export your dashboard widgets to an editable Excel document. See Dashboards in the Admin Guide for more information.
- **Sampling button** () - If you have proper permissions, clicking the Sampling button lets you create random sample sets from the document list using three different methodologies from the pop-up menu that appears.

For more information, see the Views chapter of the Admin guide.


Note: The drop-down menu that determined the folder scope has been removed from the view bar and repositioned in the folder browser. To use this new control, see [Changing folder scope](#).

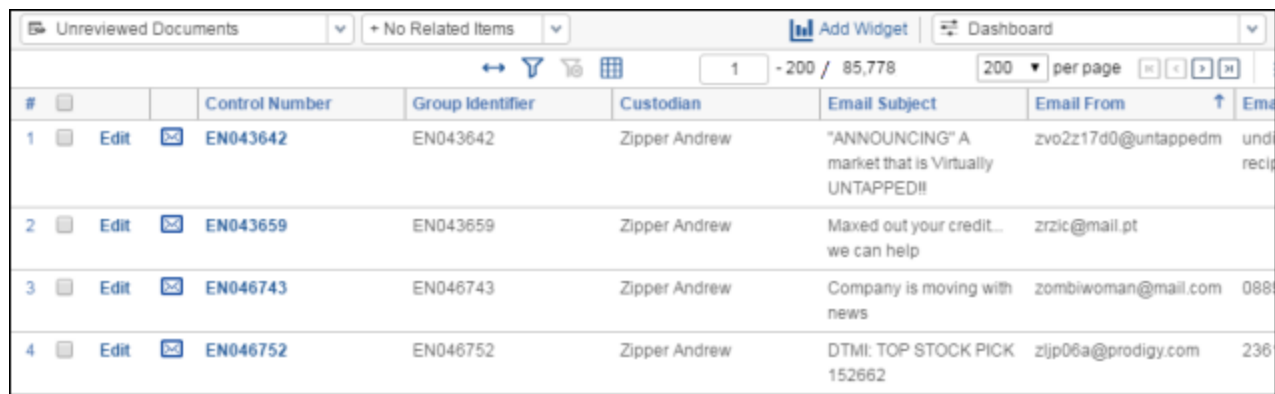
10.3.3 Item list

The item list manager consists of the item list as well as navigational and other controls for working with the list of items.


Icon	Description
 Reset column sizes	To return to the original settings for the columns, click the Reset Column Sizes icon.
 Show / Hide Filters	Click the blue icon to show filters for columns in the item list. Click the orange icon to hide them.
 Clear Filters	Click this icon to clear any filters that have been applied to the item list.
 Turn Grid Style On / Off	Click the blue icon to turn grid style on. This shrinks the row padding and alternates row shading to make your data more compact and easier to read. Click the orange icon to turn grid style off.
	Use these navigational controls to navigate the pages in the item list.

The fields that appear in the item list are based on the selected view, which is editable. Contact your Relativity administrator to change the fields in your view.

To change a column's size, hover over the white line at the edge of the column header. A double arrow appears, indicating that you can move the column. Drag it in either direction to adjust the column width. The other columns on the page automatically adjust to fill the rest of the window. Column data can be cut off. If you wish to return to the original settings click the Reset Column Sizes icon .



10.3.3.1 Saving a search from the Documents tab

You can save the conditions you've currently set up for the item list as a new search using the **Save as Search**  icon located next to the mass operations bar at the bottom of the item list.

10.3.3.2 Previewing a document

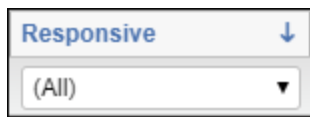
Note that if you hover your mouse pointer over a record's file icon, you can click to open a pop-up viewer showing the record.

Note: If your item list doesn't contain the file icon, contact your Relativity administrator to add it.

10.3.3.3 Sorting

You can use any field in the view to sort the entire searching set – the number of documents indicated in the bottom right.

Click any field heading once to sort the documents in that field in ascending order, alphabetically. A down arrow appears next to the heading name, as in the Responsive field below. Click a second time to sort the documents in descending order, alphabetically. An up arrow appears. Clicking the field name a third time clears the sort and returns the field to its original order.



If you're not able to sort a particular field, contact your administrator to make sure the field has the Sort option set to Yes.

10.3.4 Document set information bar

If you are using the new UI, the document set information bar no longer displays the bottom of your screen. In the new user interface, you can now browse your entire returned document set using the item list or the core reviewer interface without having to incrementally add more documents. The maximum number of documents you can load in the core reviewer interface can be changed using the FluidReviewQueueSize instance setting.

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