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1 Fact Manager

**Note:** The following content is applicable to Fact Manager installations 8.0.316.2 and above.

Relativity Fact Manager assists in organizing and analyzing case details such as facts, issues, organizations, people, interview questions, and documents. This analysis helps identify strengths and weaknesses in litigation strategy, and leads to better preparation for depositions, interviews, and trial.

### Using Fact Manager

Imagine you’re an attorney preparing for the biggest and most complicated case of your career. You’re already using Relativity as your document review system, but with all the case details you’re gathering, you need a centralized place to organize the people, facts, issues, organizations, and documents pertaining to the case. You’re using a generic filing system but are having trouble keeping your information synced with the case documents.

Using Fact Manager, you start tracking case details right in the workspace. You create new facts, or pieces of information about the case, and link existing facts to documents on-the-fly during the document review phase. This helps you associate information with particular documents in Relativity.

As you prepare for the deposition, track client interview questions and answers in Fact Manager for future case reference. You generate a timeline report with color-coded facts in Fact Manager to manage and view the case as it progresses. Link existing facts to a report, then generate the report to show your client during the deposition.

Once you’ve trimmed your document set and it’s time for trial, generate an offline report in HTML file format, where you can dynamically access documents in the courtroom for presentation using the report hyperlinks.

### 1.1 Fact Manager compatibility matrix

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<th>Relativity 9.6.1</th>
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<th>Relativity 9.4</th>
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| Fact Manager 8.2.8-.96 | X | X | X | | | | | | | |
| Fact Manager 8.2.7-.38 | X | X | X | | | | | | | |
| Fact Manager 8.2.7-.25 | X | X | | | | | | | | |
| Fact Manager 8.2.7-.13 | X | | | | | | | | | |
| Fact Manager 8.2.5-.10 | X | X | | | | | | | | |
| Fact Manager 8.2.4-.3  | X | X | | | | | | | | |
| Fact Manager 8.2.3-.23 | X | X | | | | | | | | |

Fact Manager Guide
For more information, see other Fact Manager user documentation versions online:

- [Fact Manager 9.5](#)
- [Fact Manager 9.4](#)
- [Fact Manager 9.3](#)
- [Fact Manager 9.1/9.0](#)
- [Fact Manager 8.2](#)

### 1.2 Fact Manager life cycle

Fact Manager correlates facts and issues in all stages of the case life cycle.

Fact Manager assists in the following areas of case preparation:
- **Case Outline**
  - Organize ideas about case or investigation
  - Prioritize important facts about case
  - Collaborate with colleagues on case strategy

- **Document Review Preparation**
  - Define document review protocol
  - Identify initial possible issues, people, etc.

- **Document Review**
  - Include additional issues and people
  - Add facts to support case
  - Tag documents with details
- Case Analysis
  - Add supporting documentation
  - Organize and analyze case details
- Interview and Deposition Prep
  - Use pre-organized case details to prepare witnesses
  - Add additional details
- Trial Prep
  - Use information gathered to organize and analyze details for trial preparation

### 1.3 Installation and upgrade

The Fact Manager application is available for download in the [Relativity Community](http://example.com). Use the steps below to import Fact Manager using the Import from file option.

1. Click the **Relativity Applications** tab.
2. Click the **New Relativity Application** button.
3. Click **Import From File** for Application Type.
4. Click on the ![Import File Button](image) and navigate to the place of your Fact Manager Schema and select it. The following categories on the form should auto-populate: Application Information, Application Artifacts, and Map Fields.

   **Note:** You can link the unlinked fields to existing fields, or you can proceed with the import and all unlinked fields automatically populate.

5. Click **Import**. If the install is successful, the Fact Manager tab is visible and Fact Manager is listed on the All Relativity Applications view.

### 1.3.1 Security configuration

You must configure certain permissions for proper functionality of Fact Manager.

1. Navigate to the **Workspace Details** tab.
2. Click **Manage Workspace Permissions**.
3. Click **Edit Permissions** for a group on the Group Management tab. Or, click **Object Security** and select a group from the **Current Group** drop-down menu.
4. Select **Object Security** and assign Delete and Add permissions for the following:
   - a. Fact
   - b. Fact Attachment
   - c. Issues
   - d. Issues Attachment
5. Select **Tab Visibility** and grant access to the following tabs:
   a. Fact Manager
   b. Fact
   c. Issues
   d. Organization
   e. People
   f. Interview Question
   g. Report Set
   h. Timeline Builder
   i. Printing Profile
   j. Listview Fact
   k. Listview Issues
   l. Listview Organization
   m. Listview People
   n. Listview Interview Questions
6. Click **Save**.

Fact Manager is now successfully configured. All other Relativity permissions behave in standard fashion within Fact Manager.

### 1.3.2 Controlling mass actions

As of the Relativity March 30, 2016 product update, Fact Manager are now permission-aware, meaning that system admins can now control which objects a user can use. For example, if the user doesn't have Delete permissions on the Fact object, they won't see the Mass Delete option.

The following list includes the mass actions that system admins can control on a particular object.

#### 1.3.2.1 View
- No mass actions display

#### 1.3.2.2 Edit
- Edit
- Print
- Replace
- Export to XLS
- Export to CSV

#### 1.3.2.3 Edit and Add
- Edit
- Copy
- Print
- Replace
- Export to XLS
- Export to CSV

#### 1.3.2.4 Edit, Delete and Add
- Edit
- Copy
- Print
- Replace
- Delete
1.3.3 Migrate data
Fact Manager for Relativity versions 7.4 and higher contain a Migrate Data button in the console of the Configuration tab. The migrate data functionality is designed to transfer data from Fact Manager for Relativity 7.3 and lower to the newly upgraded version.

Once you've upgraded Fact Manager from a version 7.3 or lower, you must configure the application. Once configured, use the Migrate Data button to transfer the data from the previous version into the newly upgraded version of Fact Manager.

Note: Use the Migrate Data functionality before entering information into Fact Manager, because the entered data is overwritten during migration.

1.3.4 Upgrading
To upgrade the Fact Manager application, download the newly released schema from the Relativity Community and import it into the Application Library. You can find information about Fact Manager product updates in the Relativity release notes.

Note: If you have made any modifications to Fact Manager Case Dynamics, those will be lost upon upgrade.

1.4 Accessing Fact Manager
Access Fact Manager using the Fact Manager tab located in the workspace where you installed the application.

Note: The Fact Manager application must be installed on each workspace.

The Fact Manager application uses libraries where you can enter and store information in relation to the case. These libraries are:

- Fact
- Fact Manager on page 4
- Organizations
- People
- Interview Questions
- Printing Profiles
The guide addresses Report Set, Printing Profile, and Timeline Builder in later sections.

### 1.4.1 Viewing a library item

**Note:** This guide illustrates screen content based on the Fact sub-tab. The data entry screens and practices for the libraries are similar.

To view a library item:

1. Click the **Fact Manager** tab.
2. Click the **Fact** tab.
3. View the list of previously entered facts. To view additional details, click the respective button.

#### 1.4.1.1 Setting a default viewing mode

You can set Parent Mode or List Mode as the default inline view by clicking the **Parent Mode** or **List Mode** button.
Inline view considerations:

- You can add reflective fields to inline views.
- Fact Manager caps how many linked items display in inline views in order to streamline the inline coding process.

1.4.2 Adding and editing a fact

To add a new fact, use one of the following methods:

- Keyboard shortcut Ctrl + A
- Click New Fact.

Add or edit fact information from the Fact Detail screen. See Fact detail fields on the next page.

In the Fact field, type the "@" symbol followed by one or more letters to bring up the auto-fill feature. Fact Manager presents a pop-up list of People and Organizations based on the letters you type. Click the name of the Person or Organization to add them to the details of your Fact field. Fact Manager also automatically populates the Fact People or Fact Organizations field to link to your Fact.

Click to remove an auto-filled person or organization from your fact.

To edit an existing fact, use one of the following methods:

- Click a row.
- Click , then click Edit.

To save a fact, use one of the following methods:
From a layout, click **Save**.

From a row, use the keyboard shortcut, **Ctrl + S**. Use the keyboard shortcut **Ctrl + N** to save and open a new fact row.

To browse between facts on the Fact Detail layout, use the navigation bar in the top right corner. Click the arrows to go to the first, previous, next, or last fact.

**Note:** Facts are referred to as records in the navigation bar.

### 1.4.2.1 Inline coding keyboard shortcuts and icons

Use the following shortcuts and icons when inline coding.

<table>
<thead>
<tr>
<th>Keyboard shortcut</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ctrl + S</td>
<td>Save</td>
</tr>
<tr>
<td>Ctrl + N</td>
<td>New fact row/Save and new fact row</td>
</tr>
<tr>
<td>Ctrl + A</td>
<td>New fact</td>
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<tr>
<td>Esc</td>
<td>Cancel</td>
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<tr>
<td>+</td>
<td>Add Child. See Adding a Child on page 21.</td>
</tr>
<tr>
<td></td>
<td>View full details of item</td>
</tr>
<tr>
<td></td>
<td>Expand/Collapse</td>
</tr>
<tr>
<td>Parent Mode</td>
<td>Shows nested relationships</td>
</tr>
<tr>
<td>List Mode</td>
<td>Removes nesting</td>
</tr>
</tbody>
</table>

### 1.5 Fact detail fields

You can view fact details using two different layouts. The Fact Basic Layout organizes object information using tabbed display and the Fact Extended Layout organizes object information as a list.

The Fact Detail layout contains the following fields:

Both layouts contain the following fields:
- **Fact** - A brief title for the fact. This is a required field.
- **Issues** - Association field to link issues to the fact.
- **Impact** - Indicates importance of the fact to the case - the choice selections can be customized to a user’s workflow.
- **Status** - Displays the status of the fact - the choice selections can be customized to a user’s workflow.
- **Description** - A field for describing fact in greater detail.
- **Date Type** - Designates whether the event occurred on or around a single date, or between two dates.
- **Primary Fact Date** - Denotes the date when the fact occurred, or the start date for an event that occurred between certain dates.
- **End Date** - Records the completion of a fact that took place over a period of greater than one day.
- **Excerpt** - Stores extracted relevant document text supporting the fact.
- **Fact Document** - Links workspace documents to the fact.
- **Fact Organizations** - Links a party or multiple parties, usually corporate entities to the fact.
- **Fact People** - Links people to the fact.
- **Fact Interview Question** - Links interview questions to the fact.
- **Comments** - Additional information, mental impressions or messages to colleagues, related to the fact.
- **System Last Modified By** - The name of the user who last modified the entry.
- **System Last Modified On** - The date and time the entry was last modified.

For other library items, see [Library data entry fields on page 48](#).

### 1.5.1 Adding and editing an issue

To add a new issue, use one of the following methods:

- Keyboard shortcut **Ctrl + A**
- Click **New Issue**.

Add or edit issue information from the Issue Detail screen. See [Issue detail fields on the next page](#).

To edit an existing issue, use one of the following methods:

- Click a row.
- Click ![View](#), then click **Edit**.

To save an issue, use one of the following methods:
From a layout, click **Save**.

From a row, use the keyboard shortcut, **Ctrl + S**. Use the keyboard shortcut **Ctrl + N** to save and open a new issue row.

### 1.5.1.1 Inline coding keyboard shortcuts and icons

Use the following shortcuts and icons when inline coding.

<table>
<thead>
<tr>
<th>Keyboard shortcut</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ctrl + S</td>
<td>Save</td>
</tr>
<tr>
<td>Ctrl + N</td>
<td>New issue row/Save and new issue row</td>
</tr>
<tr>
<td>Ctrl + A</td>
<td>New issue</td>
</tr>
<tr>
<td>Esc</td>
<td>Cancel</td>
</tr>
<tr>
<td>+</td>
<td>Add Child. See <a href="#">Adding a Child on the next page</a></td>
</tr>
<tr>
<td>View full details of item</td>
<td></td>
</tr>
<tr>
<td>Expand/ Collapse</td>
<td></td>
</tr>
<tr>
<td>Shows nested relationships</td>
<td></td>
</tr>
<tr>
<td>Removes nesting</td>
<td></td>
</tr>
</tbody>
</table>

### 1.6 Issue detail fields

You can view issue details using two different layouts. The Issue Basic Layout organizes object information using tabbed display and the Issue Extended Layout organizes object information as a list.

The Issue Detail layout contains the following fields:

Both layouts contain the following fields:

- **Issue** - a brief title of the issue
- **Parent Issue** - provides a list of parents for an issue entry
- **Facts** - association field to link facts to the issue
- **Issue Description** - field for describing the issue in greater detail
- **Issues Documents** - association field to link documents to the issue
- **Issues People** - association field to link people to the issue
- **Comments** - field for notes, mental impressions, or messages to colleagues that are related to the issues
1.6.1 Adding a Child
You can nest or add a child to facts, issues, and interview questions.

To add a Child:

1. Click + next to the Parent Fact name in the row.
2. Save the child using shortcut keys Ctrl + S once you populate the fields or save and add a new child using Ctrl + N.
3. Once you've created a child, the ▼ icon appears next to the parent. Click the arrow to collapse or expand the children.

1.7 Organizing facts and issues
You can organize facts and issues using several methods, including nesting, numeric outlining, drag and drop, and color coding.

1.7.0.1 Infinite nesting
You can create facts/issues and nest sub-facts/sub-issues, also known as creating parent/child relationships. There is no nesting level cap.

The numeric ordering functionality occurs when creating a fact or issue. The values auto increment and are editable. As you build items out, the numbering takes the highest number value and increments it by 1 for the next item. Children, or sub-facts/sub-issues also inherit the color of the parent fact/issue.
1.7.0.2 Drag and drop
To drag and drop a fact or issue, click and drag the item's row to:

- Nest the item in another fact/issue.
- Reorder the item above or below a fact/issue.

A blue bar indicates where the item will go when you release your mouse click.

In the following nesting example, dropping 2.1.3.2 Venice into 2.1.3 Italy will nest Venice as a sub-item of Italy.
In the following reordering example, dropping 2.1.3 Italy in between will renumber Italy to 2.1.2.

The item that you click and drag is automatically associated with the parent item to which you assign.
Deleting facts and issues
If you delete a parent item with children, Fact Manager will unlink any associated children instead of deleting the child objects. You can delete the child facts/issues by selecting the checkbox(es) next to the child item and performing a mass delete.

1.7.0.3 Color coding
Use color coding to visually distinguish the parent facts/issues and any of its children from the other parent groups.

1. Create a new fact or issue, or press Ctrl + A. By default, a new fact/issue is gray.

2. Select to apply a new color from the palette. You can change the parent item color at any point by selecting the item, then .

3. Click Save when finished.
The chosen parent item color is delineated with the same colored line at the bottom of each parent item.
1.7.0.4 Issues RDC import

(Optional) You can import an Excel file containing Issues with assigned numeric order and color coding. The example below shows how each issue and sub-issue corresponds to the import file.
Download a sample Nested Issues Import Template file for use on the 9.4 Documentation site, and refer to the below list of color coding hex values when customizing your Issues import.

<table>
<thead>
<tr>
<th>Hexadecimal value</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Light Gray</td>
<td>#e0e0e0</td>
</tr>
<tr>
<td>Dark Gray</td>
<td>#807e7e</td>
</tr>
<tr>
<td>Pink</td>
<td>#ffe0d8</td>
</tr>
<tr>
<td>Red</td>
<td>#cc0000</td>
</tr>
<tr>
<td>Yellow</td>
<td>#ff8c00</td>
</tr>
<tr>
<td>Orange</td>
<td>#ff8c00</td>
</tr>
<tr>
<td>Light Blue</td>
<td>#a4d9f3</td>
</tr>
<tr>
<td>Dark Blue</td>
<td>#1d5ab8</td>
</tr>
<tr>
<td>Light Green</td>
<td>#addfae</td>
</tr>
<tr>
<td>Dark Green</td>
<td>#339933</td>
</tr>
</tbody>
</table>

To import issues into Fact Manager using the Relativity Desktop Client (RDC).
1. Ensure that you've formatted the Excel import file correctly.
2. Open the RDC and select the Fact Manager workspace to which you are importing issues.
3. Select the Issues object, then click Tools > Import > Issues Load File...
4. Ensure the following settings are selected.
5. Map the fields as shown below and ensure **Append/Overlay** is selected before import.

![Field Map Diagram]

6. Click **Import > Import File**.

### 1.8 Printing Profile

In order to print from Fact Manager, you must create a Printing Profile.

To create a Printing Profile:

1. From the Printing Profile sub-tab, click **New Printing Profile**.
2. Add information in the Printing profile layout. See [Printing profile layout fields on the next page](#).
3. Click **Save**.
4. Click the **Facts** sub-tab.
5. Select the facts you want to print.
6. From the mass actions drop-down, select **Print**.
7. Select the profile that you just created.
8. Click Print.

1.9 Printing profile layout fields

The Printing Profile layout contains the following fields:

- **Name** - the name of the printing profile.
- **Orientation** - select an orientation for the printout sheet.
- **Object Type** - select an object type from the drop-down list. The selected object type determines the available fields to choose from.

- **Fields** - click ![select](image) to select available object fields to include on the fact printout sheet.

- **Header** - the profile name appears here.
  - **None** - select this option to not include a header name.
  - **Workspace Name** - select this option to use the Workspace Name as the printing profile name.
  - **Text** - select to enter a custom header.

- **Header position** - select a position for the header.

- **File type** - select an Image or Produced file type.

- **Print control number on images** - select whether to print the control number on imaged documents.

- **Include document placeholders** - select whether to include placeholders for documents that have not been imaged or produced.

### 1.10 Working with documents in Fact Manager

When reviewing a document, you can create a new fact and link it directly to the active document. You can also link the following to an existing fact:

- An excerpt from a document
- Issues
- People
- Organizations

When viewing an object, you can attach documents directly from your desktop without importing them into Relativity via the RDC or Web Import. You can do this in the **Attachments** field.

*Note:* You can't edit Fact Manager layouts because the application is designed to capture only fields that are related to the application.

### 1.10.1 Add an excerpt to a new or existing fact

To add an excerpt to a new fact:

1. Click the **Document** tab.
2. Click the document link.
3. On the document, highlight the excerpt, then right-click. A menu appears.
4. Click **Fact Manager > Add Excerpt to New Fact.**
5. In the Layout pane, the Create New Fact window opens. This contains the same New Fact Details fields used when entering a new fact, and should be completed in the same way.

6. Enter the information and click Save or Save and Next to add another fact to the document.

To add an excerpt to an existing fact:

1. Click the Document tab.
2. Click the documents link.
3. On the document, highlight the excerpt, then right-click. A menu appears.
4. Click Fact Manager > Add Excerpt to Existing Facts.
5. A pop-up containing existing facts appears.
6. Check the boxes next to the Fact(s) that apply to the excerpt.
7. Click Add, then click Set.

You can view the excerpts when you view Facts from the Facts tab.

**1.10.2 Attach a document to an object**

To attach a document to an object:

1. Click the object's tab, for example, the Facts tab.
2. Select a Fact and click the View icon.
3. The Fact Details layout appears. In the **Attachments** field, click **New**.

![Attachments](image)

4. The Fact Attachment Layout appears. Click **Choose File**.

![Fact Attachment Layout](image)

5. Navigate to and select the file you want to upload.

6. Click **Save**. The documents appear in the **Attachments** field.

To delete an attached document, select the checkbox next to the appropriate documents and click **Delete**.

![Attachments](image)

A pop up confirmation appears. Click **Delete** again.
1.11 Timeline Builder

Being able to visualize the chronology of Facts adds value during the stages of a case life cycle. You can use timeline reports to:

- Document the basic flow of events after an initial client consultation.
- Identify behavioral patterns that aid case strategy development.
- Pinpoint where to search for documents during discovery.
- Prepare witnesses for deposition.
- Serve as a color-coded illustrative exhibit during trial.

1.11.1 Creating a Timeline Report

To create a Timeline Report:

1. Click the Fact Manager tab.
2. Click the Timeline builder sub-tab.
3. Enter a Name.
4. Enter a Report Title.
5. Select Show Report Title if you want to include the Report Title on the report.
6. (Optional) Enter Conditions based on a selected field. Conditions behave as a hybrid between saved searches and keyword searches. Therefore, whatever field you select, the corresponding operator appears. See the Relativity Searching guide.

For example, the following condition returns all applicable facts to the selected user(s).

- **Field** - Fact People.
- **Operator** - In.
- **Value** - click to select the available values. In this case, user(s).
- **AND or OR Operators** - Use these operators to connect the criterion in each row.

7. (Optional) Click **Add another condition** to build out your conditions, and select AND or OR between multiple conditions to set additional logic. See

8. Click **Save**.

9. If you did not add conditions, you can display existing Facts, by clicking **Link/Unlink**.
10. From the pop-up picker, select the Fact(s) you want to appear in the timeline.

11. Click **Add**, then **Set**.

12. To add a new Fact, click **Add New**.

13. Fill in the fields in the pop-up and click **Save**. The fact is added to your timeline report.
   - **Fact** - A brief title for the fact.
   - **Date Type** - Designates whether the event occurred on or around a single date, or between two dates.
   - **Primary Fact Date** - Denotes the date when the fact occurred, or the start date for an event that occurred between certain dates.
   - **End Date** - Records the completion of a fact that took place over a period of greater than one day.
   - **Timeline Color** - (Optional). Select a color to apply to the new fact. See [Applying a color to a fact](#) on page 37.
Click Saved Report(s) to access all other Fact Manager reports.

1.11.2 Timeline Builder options

The following Timeline Builder options are available to customize your Timeline report. The option is orange when selected and blue when de-selected.

- **Draw Mode.** This is the default mode, click and drag facts around on the timeline to your specification.

- **Paint Mode.** Select this mode to apply a color to a fact. See Applying a color to a fact on the next page.

- **Horizontal Timeline.** This is the default display mode, and displays the timeline horizontally.

- **Vertical Timeline.** Display the timeline vertically.

- **Enable /Disable Borders.** Select this mode to enable the dotted border guidelines when saving the report to a PDF. Any fact outside of the border won't appear in the PDF report.

- **Enable/Disable Color Legend.** Select this mode to show/hide the color legend. Only used colors appear in the legend.
To edit a color name, click the color in the legend and enter a new name.

- Email the Timeline report URL to someone. The person that you send this email to must have Relativity access.

- Export the report in the selected file type format (PDF, XLS, CSV, IMAGE). For XLS exports, the report columns that appear here are controlled by the Timeline Facts view in the Facts sub-tab. For IMAGE exports, reports are saved as a JPG.

**Create Offline Report** - Select this button to create your offline report containing all of the pre-selected facts from your timeline report. See [Offline report on page 44](#).

### 1.11.2.1 Applying a color to a fact

To apply a color to a fact:

1. Ensure that you're in Paint Mode. The color palette appears.

2. Select a color from the palette.
3. Locate and click the fact that you wish to change color.
4. The fact color is now changed.

To change the fact to a different color, repeat steps 2-4.

**Note:** You can select the default light gray color to "reset" the fact color.

### 1.12 Outlines tab

With the Outlines feature in Fact Manager, you can easily build case narratives within Relativity. Within the Outlines tab, you can create free-form outlines, link to existing Fact Manager objects and documents, and create new Fact Manager objects.

The Outlines tab includes a sample outline that gives a brief overview of how to use the feature and lets you test creating and linking objects to the outline.
1.12.1 Adding and editing an outline

To add a new outline, use one of the following methods:

- Keyboard shortcut Ctrl + N
- Click New Outline.

Enter a title for your outline, and then click Save. You can also apply a color to an outline.

To edit an outline, click . The Outline layout appears. Enter your text in the rich text editor. You can also copy and paste directly from Word into the outline.

For more information on the rich text editor's features, see Using the rich text editor..

**Note:** We recommend not editing Outline layouts as this may have adverse effects on Outlines functionality.

1.12.1.1 Creating Fact Manager objects within an outline

You can create facts, people, organizations, and interview questions, or link documents from within your outline.

To create a new Fact Manager outline from within an outline, complete the following steps:

1. Highlight a section of text.

2. Right-click and then select the Fact Manager object you want to create. You can also create a new Fact Manager object from within an outline using keyboard shortcuts. For more information, see Outlines keyboard shortcuts on page 42.

3. (Optional) If you selected Fact as your object type, complete the additional following fields:
   - Fact
     - **Fact** - a brief title for the fact. This field auto-populates with the text you highlighted.
     - **Date Type** - designates whether the event occurred on or around a single date, or between two dates.
     - **Primary Fact Date** - the date when the fact occurred, or the start date for an event that occurred between certain date.
     - **End Date** - the completion of a fact that took place over a period of greater than one day.

4. Click Add [Object Name] to create your object. Click Cancel to return to your outline without creating a new object.

If you want to view and/or edit the full object details of an object within an outline, right-click on the object tag, and then click View.
To remove an object tag from within an outline, right-click on the object tag, and then click **Remove Tag**.

**Note:** Removing an object tag removes the object created on the outline.

To link a document from within an outline, complete the following steps:
1. Highlight a section of text.
2. Right click and select **Link to document**.

3. A pop up appears. Navigate to and select the document within Relativity you would like to link to the outline.
4. Click **Set**.

5. A hyperlink in the outline appears linking directly to the document.
### Outlines keyboard shortcuts

<table>
<thead>
<tr>
<th>Keyboard shortcut</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alt + F</td>
<td>Create Fact</td>
</tr>
<tr>
<td>Alt + I</td>
<td>Create Issue</td>
</tr>
<tr>
<td>Alt + P</td>
<td>Create Person</td>
</tr>
<tr>
<td>Alt + O</td>
<td>Create Organization</td>
</tr>
<tr>
<td>Alt + Q</td>
<td>Create Interview Question</td>
</tr>
</tbody>
</table>

### 1.12.1.2

#### 1.12.1.3 Linking to existing Fact Manager objects

You can link to existing Fact Manager objects as you type using the auto-fill feature. In the text editor, type the "@" symbol followed by one or more letters to bring up the auto-fill feature. Fact Manager presents a pop-up list of facts, issues, people, organizations, or interview questions based on the letters you type.

![Auto-fill feature](image)

If you want to view and/or edit the full object details of an object within an outline, right-click on the object tag, and then click **View**. If a document is linked to an object, that document is automatically linked to the outline. If an object is tagged within an Outline tag, the tags are automatically linked to each other.

To remove an object tag from within an outline, right-click on the object tag, and then click **Remove Tag**. Any documents linked to that object will also be unlinked from the outline.

### 1.12.1.4 Running a conflict check

If you tag a Fact Manager object in the text editor and then update or delete that object outside the outline, the outline doesn't update automatically. Click **Check Conflicts** to resolve or ignore conflicts.
1.12.2 View mode
When you save an outline, the outline appears in View mode. You can also open View mode by clicking
from the Outlines tab. From View mode, you can view the full details of an outline including all facts, issues, people, organizations, and interview questions linked to the outline. You can also link documents to the outline and export the outline as a Word document. An option to download export history of Outline export date, user, and files is also available.

1.12.2.1 Linking documents to an outline
To link documents to an outline, complete the following steps:

1. Click Link.
2. Select the documents you want to link to your outline, and then click Add.
3. Click Set.

To unlink documents from an outline, select the documents you want to unlink, and then click Unlink.

1.12.2.2 Exporting an outline
To export an outline, click the Export Outline drop-down in the Outline Text section, and then click Word.

The documents will download as a zip file along with the outline text.
If you linked any documents within the outline, they will appear as hyperlinks. Clicking on the hyperlinks opens the documents in the zip file.

1.12.2.3 Export History
The Export History section contains the following fields:

- **Export File** - the files exported along with the Outline export.
- **System Created By** - the user who completed the export.
- **System Created On** - the date the files were exported.

You can export a list of the Export history as a .csv file by clicking the export button.

1.13 Reports

1.13.1 Offline report
You can view Facts, Issues, People, Interview Questions, and Related Documents without Internet access with an Offline Fact report. This is a convenient feature for reviewing case information while preparing for and during interviews, depositions, and trial.

To create an Offline Fact report:

1. Click the **Fact Manager** tab.
2. Click the **Report Set** sub-tab.
3. Click the **New Report Set** button.

**Note:** The **Include document files in offline reports** field is set to **Yes** by default. If you don't want to include documents in the report, select **No** and proceed to step 7.

6. Enter information in the Offline Report Settings fields. See **Offline Report Settings fields on page 46**.
7. Click **Save** when finished.

**Note:** The order numbers that appear next to the selected productions in the Production precedence field are not a part of the actual production set name. These numbers are only applied to reflect the order precedence for this report.

8. Select **Link** to include any facts, issues, people, or questions. The Select Items pop-up displays.
9. Select the check boxes next to the fact(s), issue(s), people, or question(s).
10. Click **Add**, then click **Set**. Once linked, the facts, issues, people, or questions appear under the Fact (Report Facts) and/or the issues (Report issues) sections.

To run the report:
1. From the Report Set Console, click **Generate Report**. A .ZIP dialog displays.

![Offline Report](image)

2. Save this to a desired location.

3. Open and extract the .ZIP file to view the fact, issues, people, or question files.

4. In the .HTML report page, click the hyperlinks to view the applicable document in the desired original format.

The Documents folder in the .ZIP file contains sub-document fact, issue, people, or question folders, depending on the object type selected in the Offline report settings. Use this to associate documents to the applicable facts, issues, people, or question files.

For example, if you opened the Facts sub-folder, you'd see a document numbering convention starting with F1.0_AZipper_0007293.htm. On the .html report page, you can use the ID column to match up all of the F1 documents to the files listed on the .html report.

1.13.2 Report Set fields

The Report Set layout contains the following fields:
1. Name - the report file name in Fact Manager.
2. Report title - the report title that appears on the offline report.
3. Show report title - select yes or no to include the report title on the final report.

1.13.3 Offline Report Settings fields

The Offline Report Settings layout appears when you select Offline Report from the Report set type drop-down and contains the following fields:

- **Include document files in offline reports** - determine whether to include documents in the offline report. The field is set to Yes by default and contains additional file type options below.

- **File type** - the document version included in the Offline report.
  - **Image** - this option only includes the imaged version of the documents. If an image doesn’t exist, a document won’t be included.
  - **Image or provide native, if no image exists** - this option tells Fact Manager to first look for an imaged version of a document, and if found the image is included in the report. If no image
exists, Fact Manager looks for a native and if a native exists, the native is included in the report.

- **Native** - this option only includes the native version of the documents linked to Facts and/or Issues.
- **Produced** - this option is used to set a production precedence.

**Production precedence** - click ![Button](48x48) to select the desired production(s) in the workspace.

- Click **Add**, then use the up or down arrows to set a production order precedence.
- Click **Save**.

**When no production is available include** - the document version included in the Offline report. Use these options in conjunction with the Production precedence field.

- **Image** - this option tells Fact Managers to look for documents to be a part of the previously selected production sets. If the document is not in any of the production sets, then Fact Manager looks for an imaged version of the document. If the image exists, it is included in the report. If no image exists, no document is included in the report.
- **Image or provide native, if no image exists** - this option tells Fact Manager to look for an imaged version of a document, and if found the image is included in the report. If no image exists, Fact Manager looks for a native and if a native exists, the native is included in the report.
Native - this option only includes the native version of the documents linked to Facts and/or Issues.

None - this option tells Fact Manager to only include produced documents. If a Fact or an Issue is linked to a document that is not produced, the document is not included in the report; only a control number displays.

1.13.4 Master report
You can select views for exporting with the master report. With this report you can select all Fact Manager views, including user created views, in one operation. This report can come in handy when archiving a case or if you need to review all the items in Fact Manager. When generating this report, the output is an Excel document with workbook tabs for each selected view.

1.13.4.1 Creating a master report
To create a master report:

1. Click the Fact Manager tab.
2. Click the Report Set sub-tab.
4. Click Save.
5. Check the Views for exporting.
6. Click Generate Report.

1.14 Resources

1.14.1 Prior installations of Fact Manager
For installations of Fact Manager on Relativity 7.4 and earlier, locate the following resources on the Relativity Community:

- Installation Guide
  - Provided in the Installation Package .zip file
- Reference Guide
  - Provided in the Installation Package .zip file

1.15 Library data entry fields
The following sections describe the library data entry fields used when adding or editing an Issue, Organization, People item, and Interview question.
1.15.1 Issue fields

- **Issue** - a brief title of the issue
- **Parent Issue** - provides a list of parents for an issue entry
- **Facts** - association field to link facts to the issue
- **Issue Description** - field for describing the issue in greater detail
- **Issues Documents** - association field to link documents to the issue
- **Issues People** - association field to link people to the issue
- **Comments** - field for notes, mental impressions, or messages to colleagues that are related to the issues
- **System Last Modified By** - the name of the user who last modified the entry
- **System Last Modified On** - the date and time the entry was last modified

1.15.2 Organization fields

- **Organization** - the name of party or company involved in the case
- **Office Location** - office address
- **Website** - website address for organization
- **Organization People** - association field to link people to the organization
- **Organization Documents** - association field to link documents to the organization
- **Comments** - field for notes, mental impressions, or messages to colleagues that are related to the organizations
- **System Last Modified By** - the name of the user who last modified the entry
- **System Last Modified On** - the date and time the entry was last modified

1.15.3 People fields

- **Last Name** - the last name of the individual involved in the case
- **First Name** - the first name of the individual involved in the case
- **Organization People** - association field to link organizations to the person
- **Phone number** - contact phone number for person
- **Primary Email Address** - contact email address for person
- **Role in Litigation** - displays the roles for the person. The choice selections can be customized for your workflow.
- **Corporate Title** - displays the titles for the person. The choice selections can be customized for your workflow.
- **Comments** - field for notes, mental impressions, or messages to colleagues that are related to the person
- **System Last Modified By** - the name of the user who last modified the entry
- **Date Last Modified By** - the date and time the entry was last modified

### 1.15.4 Interview question fields
- **Interview Question** - question for interview or deposition use
- **Parent Interview Question** - provides a list of parents for an Interview Question entry
- **Question Answer** - response from interview or deposition
- **Interview Question People** - association field to link person to the interview question
- **Interview Question Document** - association field to link document to the interview question
- **Fact Interview Questions** - association field to link facts to the interview question
- **System Last Modified By** - the name of the user who last modified the entry
- **Date Last Modified On** - the date and time the entry was last modified
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