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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, you 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. You 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 and dynamically access documents in the courtroom for presentation using the report hyperlinks.

1.1 Fact Manager compatibility matrix

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

- [Fact Manager 9.4](#)
- [Fact Manager 9.3](#)
- [Fact Manager 9.2](#)
- [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

You can install the Fact Manager application on your current Relativity instance through one of the following methods:

- Fact Manager on page 5
- Upgrading on page 15

**Note:** Only a user with the appropriate system admin rights can import application schema.

**Note:** You should install/upgrade during off-hours as this disrupts workspaces services and causes them to be inaccessible during the install/upgrade period.

The Fact Manager application is available for download in the Relativity Community. 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**.
3. Next to Application Type, select **Import From File** for Application Type.
4. Click **Choose File** and select the Fact Manager Schema.
5. Click **Open**. 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.

6. 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

1.4 Security permissions

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. Enable the following security permissions:

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<th>Other settings</th>
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<td>Use Pivot/Chart</td>
</tr>
<tr>
<td>Fact Attachment - Delete, Add</td>
<td>Fact</td>
<td></td>
</tr>
<tr>
<td>Issues - Delete, Add</td>
<td>Issues</td>
<td></td>
</tr>
<tr>
<td>Issues Attachment - Delete, Add</td>
<td>Organization</td>
<td></td>
</tr>
<tr>
<td>Organization - Delete, Add</td>
<td>People</td>
<td></td>
</tr>
<tr>
<td>Organization Attachment - Delete, Add</td>
<td>Interview Question</td>
<td></td>
</tr>
<tr>
<td>Person - Delete, Add - Delete, Add</td>
<td>Report Set</td>
<td></td>
</tr>
<tr>
<td>Person Attachment - Delete, Add</td>
<td>Timeline Builder</td>
<td></td>
</tr>
<tr>
<td>Interview Question - Delete, Add</td>
<td>Printing profile</td>
<td></td>
</tr>
<tr>
<td>Interview Questions Attachment - Delete, Add</td>
<td>Listview Fact</td>
<td></td>
</tr>
<tr>
<td>Outline - Delete, Add</td>
<td>Listview Issues</td>
<td></td>
</tr>
<tr>
<td>Export History - Delete, Add</td>
<td>Listview Organization</td>
<td></td>
</tr>
<tr>
<td>Report Set - Delete, Add</td>
<td>Listview People</td>
<td></td>
</tr>
<tr>
<td>Email Alias - Delete, Add</td>
<td>Listview Interview Questions</td>
<td></td>
</tr>
<tr>
<td>Printing Profile - Delete, Add</td>
<td>Outlines</td>
<td></td>
</tr>
<tr>
<td>Pivot Profile - Delete, Add</td>
<td>Listview Outlines</td>
<td></td>
</tr>
<tr>
<td>Report File - Delete, Add</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Production Set MOObject - Delete, Add</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Field MOObject - Delete, Add</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Timeline Condition - Delete, Add</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Custom Date Box - Delete, Add</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Custom Legend - Delete, Add</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Fact Manager is now is successfully configured. All other Relativity permissions behave in standard fashion within Fact Manager.
1.4.1 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 items a user can use. For example, if the user doesn't have Delete permissions on the Fact item, they won't see the Mass Delete option.

The following list includes the mass actions that system admins can control on a particular item:

1.4.1.1 View
- No mass actions display

1.4.1.2 Edit
- Edit
- Print
- Replace
- Export to XLS
- Export to CSV

1.4.1.3 Edit and Add
- Edit
- Copy
- Print
- Replace
- Export to XLS
- Export to CSV

1.4.1.4 Edit, Delete and Add
- Edit
- Copy
- Print
- Replace
- Delete
- Export to XLS
- Export to CSV

1.4.2 Upgrading
To upgrade the 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, those will be lost upon upgrade.

### 1.5 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
- Issues
- Organizations
- People
- Interview Questions
- Printing Profiles
- Report Set
- Timeline Builder

### 1.5.1 Viewing a library item

**Note:** The following 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.
1.5.1.1 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.

1.5.2 Adding and editing a fact

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

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.

1.5.2.1 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>
</tr>
<tr>
<td>Esc</td>
<td>Cancel</td>
</tr>
<tr>
<td>⌃</td>
<td>Add Child. See <a href="#">Adding a Child on page 21</a>.</td>
</tr>
<tr>
<td></td>
<td>View full details of item</td>
</tr>
<tr>
<td>⌚</td>
<td>Expand/ Collapse</td>
</tr>
</tbody>
</table>

**Note:** Facts are referred to as records in the navigation bar.
1.6 Fact detail fields

You can view fact details using two different layouts. The Fact Basic Layout organizes item information using tabbed display and the Fact Extended Layout organizes item 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, including time.
- **End Date** - Records the completion of a fact that took place over a period of greater than one day, including time.
- **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](#).
1.6.1 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 below.

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

- Click a row.
- Click , 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.

1.6.1.1 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 Adding a Child on the next page.</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>

1.7 Issue detail fields

You can view issue details using two different layouts. The Issue Basic Layout organizes item information using tabbed display and the Issue Extended Layout organizes item 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
- **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](#).

### 1.7.1 Adding a Child

You can nest or add a Child Fact 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 Fact, the icon appears next to the Parent Fact. Click the arrow to collapse or expand the Child Facts.

#### 1.7.1.1 Issues views

By default, the Fact Manager Issue view is configured to correctly display Issues. If creating a new Issue view, ensure that the following Set Sort fields are in this order:

![Set Sort](#)

- **Family Order** - This whole number field contains the numeric value of parent issues only.
Order - This fixed-length text field contains the numeric values for parent and child issues.

Family Structure Order - This whole number field helps create the outline structure of all the issues.

1.8 Organizing facts and issues

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

1.8.0.1 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.

1.8.0.2 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 items. You can delete the child facts/issues by selecting the checkbox(es) next to the child item and performing a mass delete.

**1.8.0.3 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.

1.9 Importing Fact Manager items

You can import an Excel file with Facts, People, or Issues with assigned numeric order and color coding to the corresponding Fact Manager item. For example, you might import a contact list to the People item or a list of issues to the Issues item. The example below uses Issues as an example and shows how each issue and sub-issue corresponds to the import file.
Download a sample Nested Issues Import Template file for use on the 9.5 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>Color</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>#ffd0d8</td>
</tr>
<tr>
<td>Red</td>
<td>#cc0000</td>
</tr>
<tr>
<td>Yellow</td>
<td>#ffe060</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 item you want to import to, then click **Tools > Import > [item] Load File**...

![Relativity Desktop Client](image1)

4. Ensure the following settings are selected.

![Relativity Desktop Client | Import Issues Load File](image2)
5. Map the appropriate fields and ensure **Append/Overlay** is selected before import.

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

### 1.10 Printing Profile

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

To create a Printing Profile:

1. Navigate to the Printing Profile sub-tab, and then 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. Click the mass actions drop-down and select **Print**.
7. Select the profile that you just created.
8. Click **Print**.

1.11 Printing profile layout fields

The Printing Profile layout contains the following fields:

- **Name** - enter 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 to select available object fields to include on the fact printout sheet.

- **Header** -
  - **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 this option 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.

### 1.12 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 item, 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.

#### 1.12.1 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.

### 1.12.2 Attach a document to an item

To attach a document to an item:

1. Click the item'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.
1.13 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.

1.13.1 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.

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, and then click 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.

### 1.13.2 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.

- **Compress.** Select this mode to compress the number of facts that fit on your timeline.

- 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](#).

### 1.13.2.1 Applying a color to a fact

To apply a color to a fact:

1. **Ensure that you're in Paint Mode.**

2. Select a color from the palette.

3. Locate and click the fact that you wish to change color.

To change the fact to a different color, repeat steps 2-3.

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

### 1.14 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 items and documents, and create new Fact Manager items.
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 items to the outline.

1.14.1 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.

**Note:** If one user is editing an outline, the outline will be available as read-only. A warning message appears to let users know they can access the read-only mode and who is editing 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.

1.14.1.1 Setting up a saved font color and style for users
To set up or edit a saved font color and style:

1. Edit an outline.
2. Click the User format settings toggle ( ) found along the top of the rich text editor.
3. The font icon ( ) is highlighted. Click the drop-down to open the font options.
4. Choose the designated font formatting for the user.
5. Click Save.

To remove the saved font, click the User format settings toggle to turn it off.

1.14.1.2 Creating Fact Manager items 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 item you want to create. You can also create a new Fact Manager item 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 item type, complete the additional following fields:
   - 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 dates.
   - End Date - the completion of a fact that took place over a period of greater than one day.

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

If you want to view and/or edit the full item details of an item within an outline, right-click on the item tag, and then click View.

To remove an item tag from within an outline, right-click on the item tag, and then click Remove Tag.
Note: Removing an item tag removes the item 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**.

![Outline Layout](image)

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>

1.14.1.3 Linking to existing Fact Manager items

You can link to existing Fact Manager items 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.

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

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

1.14.1.4 Running a conflict check

If you tag a Fact Manager item in the text editor and then update or delete that item outside the outline, the outline doesn’t update automatically. Click Check Conflicts to resolve or ignore conflicts.
1.14.2 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.

1.14.2.1 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.

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

You can export documents linked to an outline by checking Include Documents.

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.

1.14.2.3 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.

### 1.15 Reports

#### 1.15.1 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.

**Note:** If you would like dates in the offline report to appear with UK date formatting, change your language settings in your browser to English (United Kingdom).

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.

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.
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.

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 item type selected in the Offline report settings. In the Documents folder, you can 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.

![](image.png)

### 1.15.2 Report Set fields

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

### 1.15.3 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

- **Yes**
- **No**

#### File type

- **Image**
- **Image or provide native, if no image exists**
- **Native**
- **Produced**

#### Production precedence

- **01. For Offline Report**
- **Clear**

#### When no production is available include

- **Image**
- **Image or provide native, if no image exists**
- **Native**
- **None**

- **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 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.

### 1.15.4 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.

#### 1.15.4.1 Creating a master report

To create a master report:

1. Click the Fact Manager tab.
2. Click the Report Set sub-tab.
3. Click **New Report Set** and select Master Report from the Report Set Type drop-down menu.
4. Click **Save**.
5. Check the Views for exporting.
6. Click **Generate Report**.

### 1.16 Resources

#### 1.16.1 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

### 1.17 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.
1.17.1 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

1.17.2 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

1.17.3 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

### 1.17.4 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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