



User Guide

July 2, 2025

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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 an application with many screens and functions. This section describes the Review Interface you use to review documents and 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 tabs displayed in the sidebar on the left side of the page. You may also be able to access tabs using the tab strip, which runs horizontally across the top of the page. The sidebar and tab strip display the currently available tabs whether you are on the instance or workspace-level. The active tab in the sidebar is indicated by the tab icon displaying in orange and in the tab strip, the active tab is indicated by an orange line displaying under the name.

The tabs are arranged based on the order value for each tab.

You can navigate tabs using the following features.

1.1.2.1 Sidebar

The sidebar allows you to place tabs that you commonly use on the left-side of Relativity so that you can access them at your convenience.

one

Salt vs. Pepper

Entities > Entities ☆

CTRL+J

Entities

Aliases

>

New Entity

Entities – Processing View

Add Widget

1

- 10 of 10

25

per page

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| # | Full Name | Document numbering prefix | Classification | Notes |
|----|-------------------------------------|---------------------------|--|-------|
| 1 | Adams, Felicity | ADA | Custodian – Processing | |
| 2 | Caruso, Alexander | CAR | Custodian – Processing | |
| 3 | Derozan, John | DER | Communicator – Analytics | |
| 4 | Farrell, Ndaya | FAR | Custodian – Processing | |
| 5 | Parker, Candi | PARK | Communicator – Analytics; Custodian – Processing | |
| 6 | Stone, Brittany | STO | Communicator – Analytics; Custodian – Processing | |
| 7 | Thompkins, Brian... | KINS | | |
| 8 | Thompson, George | TH | Communicator – Analytics | |
| 9 | Wolfe, Jason | WOLF | | |
| 10 | Zipper, Andy | ZIP | Communicator – Analytics | |

All 10

Edit

^

Total: 10

Documents

Entities

Review Batches

Processing

Batch Sets

Workspace Details

Persistent Highlight...

More >

<<

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Tabs are ordered from top to bottom of the sidebar based on the value entered in **Order**. The lowest order value displays at the top and the highest value displays at the bottom.

The total number of tabs that display in the sidebar is determined by the resolution of your browser. Tabs that have been assigned to the sidebar and do not fit, are available by hovering your cursor over the **More** icon. If a tab has one or more child tabs, you can view and select those tabs by hovering over the parent tab's row in the fly-out menu.

one

Salt vs. Pepper

Documents ☆

CTRL+J

Documents

Entities

Review Batches

Processing

Batch Sets

Workspace Details

Persistent Highlight...

Fields

More >

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All Documents

No Related Items

Browsers

Filter

Salt vs. Pepper

BeckSally

LayKenneth

RingAndrea

WolfeJason

ZipperAndrew

Search Conditions

+ Condition

▼

Run Search

Auto Run

Run Search

Auto Run

Keyword Search

Enter Search Terms

Search

Clear

>

List

1

- 100 of 634

100

per page

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| # | File Type | Control Number | Custodian | Record Type | Email From | Email To | Responsive |
|----|---------------------------------|----------------|-----------|---|--|----------------------------------|------------|
| 1 | AZIPPER_0007291 | Zipper, Andy | Attach | Forster David <David.Forster@ENRON.com> | Zipper Andy <Andy.Zipper@ENRON.com> | Responsive - Privileged Redacted | |
| 2 | AZIPPER_0007293 | Zipper, Andy | Attach | Forster David <David.Forster@ENRON.com> | Zipper Andy <Andy.Zipper@ENRON.com> | Non-Responsive | |
| 3 | AZIPPER_0007299 | Zipper, Andy | Attach | Beck Sally <Sally.Beck@ENRON.com> | Zipper Andy <Andy.Zipper@ENRON.com> | Responsive - Privileged Redacted | |
| 4 | AZIPPER_0007300 | Zipper, Andy | Attach | Piper Greg <Greg.Piper@ENRON.com> | Zipper Andy <Andy.Zipper@ENRON.com> | Non-Responsive | |
| 5 | AZIPPER_0007491 | Zipper, Andy | Attach | Piper Greg <Greg.Piper@ENRON.com> | Zipper Andy <Andy.Zipper@ENRON.com> | Responsive | |
| 6 | AZIPPER_0007494 | Zipper, Andy | Attach | Boyd Justin <Justin.boyd@enron.com> | Whalley Greg <Greg.Whalley@ENRON.com>, Sheriff John <John.Sheriff@ENRON.com> | | |
| 7 | AZIPPER_0007495 | Zipper, Andy | Attach | Piper Greg <Greg.Piper@ENRON.com> | Zipper Andy <Andy.Zipper@ENRON.com> | Needs Further Review | |
| 8 | AZIPPER_0007746 | Zipper, Andy | Attach | McQuade Jennifer <Jennifer.McQuade@ENRON.com> | Whalley Greg <Greg.Whalley@ENRON.com>, Zipper Andy <Andy.Zipper@ENRON.com> | Technical Issue | |
| 9 | AZIPPER_0011373 | Zipper, Andy | Attach | SCS_2 <scsloptions@attglobal.net> | Undisclosed-Recipient: mailman.enron.com; | | |
| 10 | AZIPPER_0011374 | Zipper, Andy | Attach | Enron Announcements/Corp/Enron@ENRON | All Enron Worldwide@ENRON | | |
| 11 | AZIPPER_0011375 | Zipper, Andy | Attach | N <IMCEANOTES-N@20Enron+20Worldwide+40E | | | |
| 12 | AZIPPER_0011376 | Zipper, Andy | Attach | Enron+20Announcements_Corp_Enro | NRON@ENRON.com> | | |

All 634

Edit

^

Save Search

Total: 634

Relativity one

User Guide

8

The More icon will display with an orange bar on the right side **More** to indicate that the active tab is located in the More menu.

To add a new or pre-existing tab to the sidebar, toggle the **Show in Sidebar** on and click **Save**.

Tab Location

Show in Sidebar * ☒

Icon *

Parent


Order *

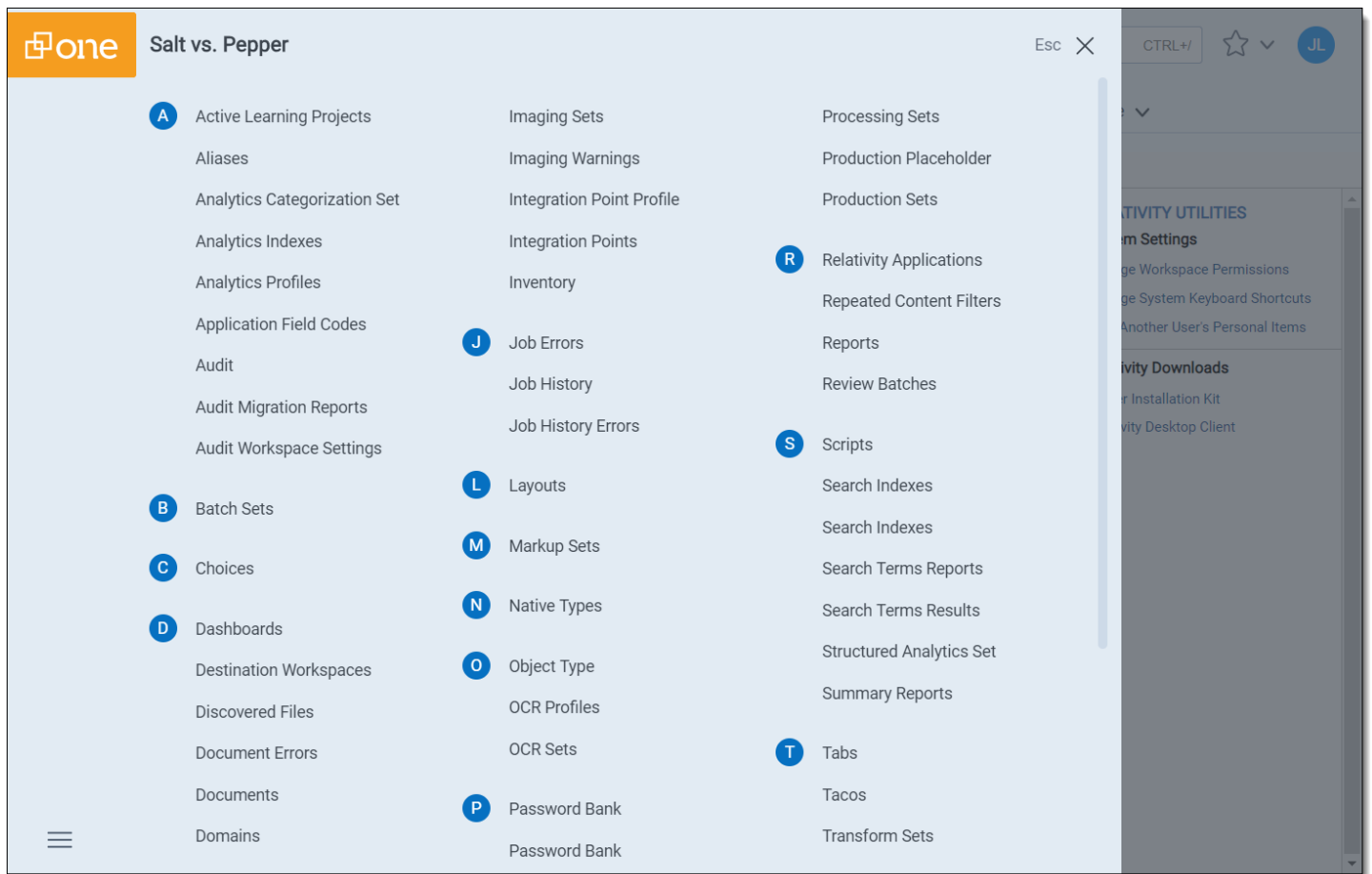
View Order

Tabs can display in the sidebar with their name and icon. Alternatively, to reduce the width of the sidebar and increase the number of icons that can display, you can click the collapse arrow icon to only display the icon for each tab.



1.1.3 All tabs menu

Click the  icon at the bottom of the sidebar to display the All tabs menu. Every child tab that a user can view, as determined by their permissions, will display in the menu in alphabetic order. This menu does not display parent tabs.



1.1.4 Tab strip

If you select a tab that either has child tabs or is a child tab to a parent tab, the tab strip will display horizontally across the top of Relativity. If a tab in the tab strip has one or more children tabs, hover your cursor over it to view and select the desired tab. Depending on the size of your browser, there may be more tabs than can display in the tab strip. You can hover your cursor over **More** in the tab strip to view additional tabs in a fly-out menu.

Salt vs. Pepper Reporting > Search Terms Repo... > Search Terms Reports ☆

Search Terms Report Summary Reports Pivot Profiles Domains

> Q New Search Terms Report All Search Terms Reports

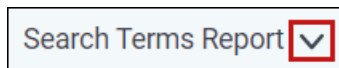
1 - 5 of 5 100 per page

| # | Name | Index | Type | Status | Searchable set |
|---|---|--------------|----------------|-----------|----------------|
| 1 | STR - Search Terms Report | STR dtSearch | Report and tag | Completed | All Documents |
| 2 | May STR | STR dtSearch | Report and tag | Completed | All Documents |
| 3 | Trade Secrets STR | dtSearch | Report and tag | Completed | All Documents |
| 4 | Florida vs. Wyatt STR | STR dtSearch | Report and tag | Completed | All Documents |
| 5 | Hart vs. Bradley STR | dtSearch | Report and tag | Completed | All Documents |

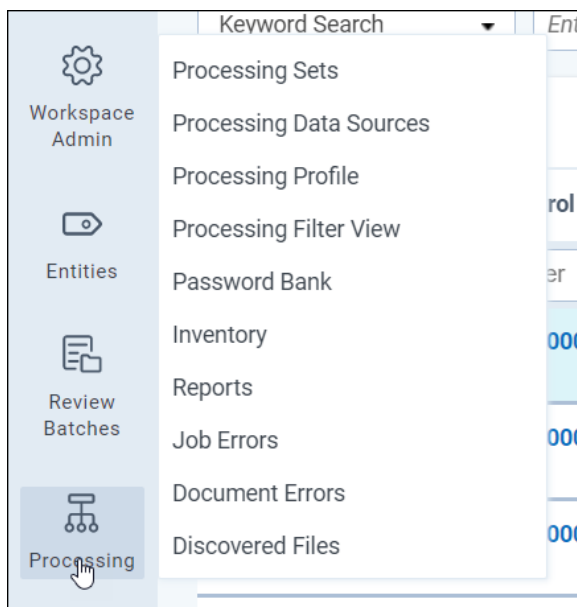
All 5 Copy Total: 5

1.1.4.1 Parent and child tab display

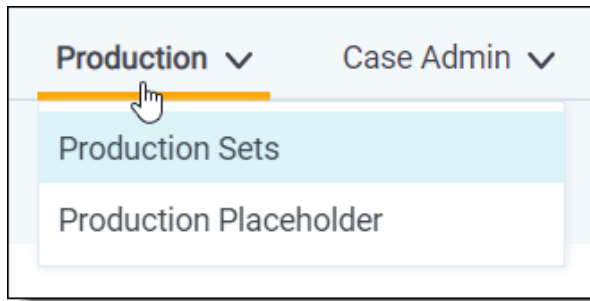
Parent tabs can be displayed in the sidebar or the tab strip. Tabs that have child tabs in the tab strip will display with an arrow on the right side.



To view the child tabs of a parent tab in the sidebar or tab strip, hover your cursor over the parent tab and the child tabs will display in a fly-out menu.



When you select a child tab from the sidebar or the tab strip, you are taken to that page. For example, Production Sets. In addition to an orange bar displaying underneath the parent tab in the sidebar, the child tab and the path to reach the active tab is highlighted in blue to help you track your location in the sidebar or the tab strip.



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.

1.1.5 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. You can change the default Home tab to be any tab you want.

You can click your avatar in the upper-right corner to see the user drop-down menu. The avatar contains the initials of your first and last name

1.1.5.1 Changing the default Home tab

Relativity displays the Workspaces tab as your default Home tab when you navigate to Home. 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. Navigate to the **Tabs** tab.
2. Click on the tab you want to set as the default Home tab.
3. Click the **Edit** icon in the row of the tab you wish to edit.
4. Toggle the **Set as Default Tab** field on.
5. 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.

1.1.5.2 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. 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 1-200.
- **Default Selected File Type**—the default viewer mode used when first loading the Viewer. Viewer, Native, Image, Long Text, or Production. If the mode selected is not available, the Viewer will instead use the first available option. See [Viewer on page 64](#) 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.
- **User-Group Email Notifications**—user's preference for email notifications when adding or deleting Users or Groups.
 - **All Emails**—receive all email notifications.
 - **No Emails**—receive no email notifications.
 - **Only Failed Operations**—receive email notifications on failed operations only.

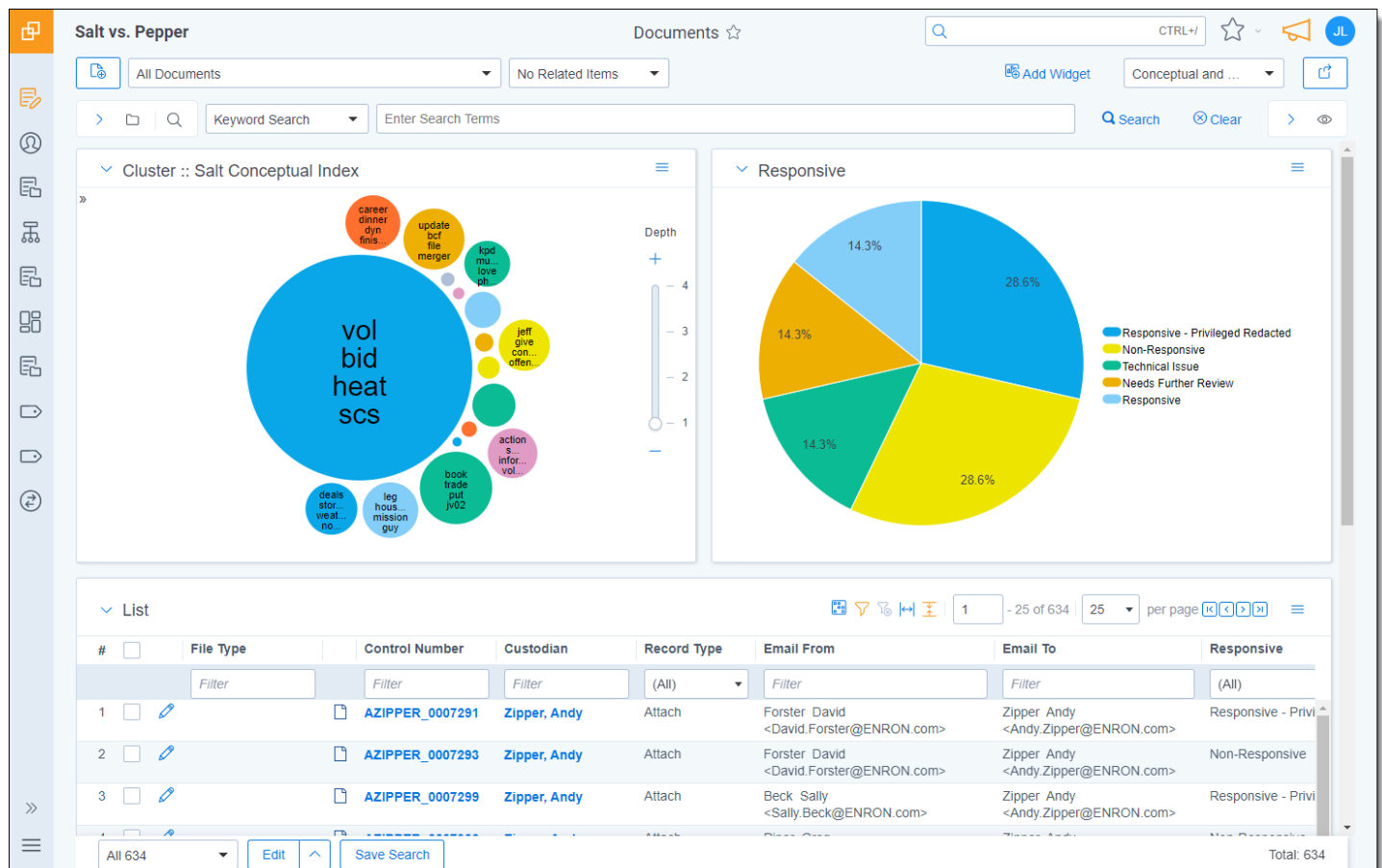
Note: Depending on your permissions, you may not have rights to edit the **User-Group Email Notifications** field.

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

1.1.5.3 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.

Note: For a list of dashboards that provide an effective starting point for administrators to help review teams visualize their data set, see Common commonly-used dashboards in the Admin Guide.



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 Multi-Direction Cursor icon. Then, click and drag the panel to the new location.
- To collapse the search panel or browser pane, click the Collapse icon. Once collapsed, click the **Show Browser Panel** icon to restore the browser pane or the **Show Search Panel** 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.

Dashboards and widgets can be copied over to newly created workspaces if they are part of a template. Dashboards only report on data within the workspace you are in if data is loaded in the workspace.

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.

Creating a dashboard

To create a dashboard:

1. Click the **Dashboards** drop-down menu 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 sub-clusters and conceptually-related clusters of documents. Please note that there may be only one cluster visualization widget per dashboard.
- **Communication Analysis**—after running the name normalization operation within structured analytics, you can use this widget to visualize communication frequencies, patterns, and networks between the entities linked to the documents in the view.

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 menu until it is saved.

1. Click the Dashboards drop-down menu 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 **Delete** icon to the right of the dashboard you want to delete in the Dashboards drop-down menu.

Click **Delete** in the Delete Dashboard Confirmation pop-up window 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 **Edit** icon next to the name of the dashboard in the Dashboard drop-down menu.
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.

1.1.5.4 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.

1.1.6 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 cannot 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 dialog.

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

Reset Password

Save Cancel

Please set a new password. Relativity requires that each password contain at least:

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

Old Password:

New Password:

Retype Password:

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

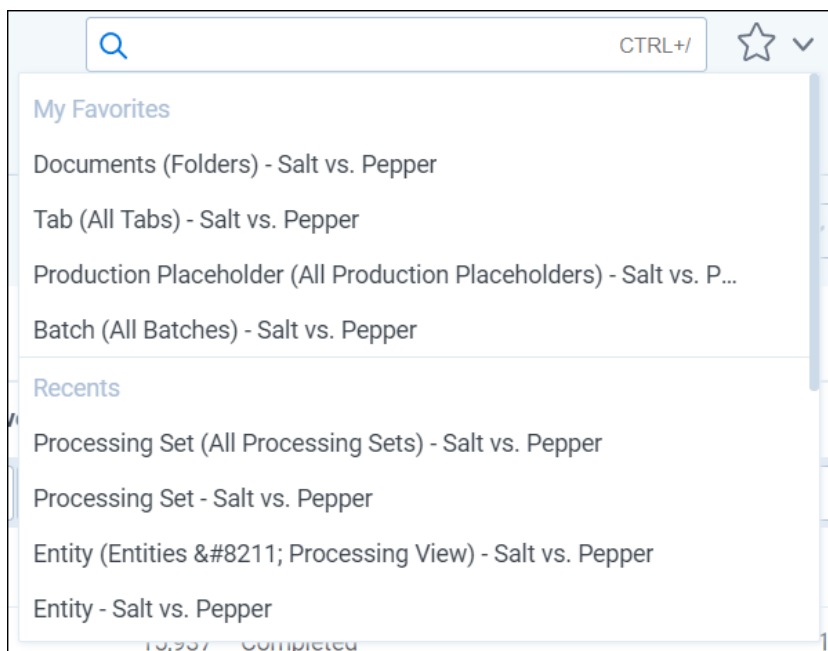
1.1.6.2 Resetting your password outside Relativity

If you cannot 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 dialog.
Relativity sends an email to the address you provide. You should receive this message within a few minutes. If you do not 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 can be accessed by clicking the **Favorites** icon in the upper-right part of the page.



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 as a favorite, click the star to the right of the breadcrumbs at the top of the page. 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.

| # | File Type | Control Number | Custodian | Record Type | Email From | Email To | Responsive |
|----|-----------|-----------------|--------------|-------------|--|---|----------------------------------|
| 1 | | AZIPPER_0007291 | Zipper, Andy | Attach | Forster David <David.Forster@ENRON.com> | Zipper Andy <Andy.Zipper@ENRON.com> | Responsive - Privileged Redacted |
| 2 | | AZIPPER_0007293 | Zipper, Andy | Attach | Forster David <David.Forster@ENRON.com> | Zipper Andy <Andy.Zipper@ENRON.com> | Non-Responsive |
| 3 | | AZIPPER_0007299 | Zipper, Andy | Attach | Beck Sally <Sally.Beck@ENRON.com> | Zipper Andy <Andy.Zipper@ENRON.com> | Responsive - Privileged Redacted |
| 4 | | AZIPPER_0007300 | Zipper, Andy | Attach | Piper Greg <Greg.Piper@ENRON.com> | Zipper Andy <Andy.Zipper@ENRON.com> | Non-Responsive |
| 5 | | AZIPPER_0007491 | Zipper, Andy | Attach | Piper Greg <Greg.Piper@ENRON.com> | Zipper Andy <Andy.Zipper@ENRON.com> | Responsive |
| 6 | | AZIPPER_0007494 | Zipper, Andy | Attach | Boyd Justin <Justin.boyd@enron.com> | Whalley Greg <Greg.Whalley@ENRON.com>; Sherriff John <John.Sherriff@ENRON.com> | |
| 7 | | AZIPPER_0007495 | Zipper, Andy | Attach | Piper Greg <Greg.Piper@ENRON.com> | Zipper Andy <Andy.Zipper@ENRON.com> | Needs Further Review |
| 8 | | AZIPPER_0007746 | Zipper, Andy | Attach | McQuade Jennifer <Jennifer.McQuade@ENRON.com> | Whalley Greg <Greg.Whalley@ENRON.com>; Zipper Andy <Andy.Zipper@ENRON.com> | Technical Issue |
| 9 | | AZIPPER_0011373 | Zipper, Andy | Attach | SCS_2 <scsloptions@attglobal.net> | Undisclosed- Recipient: @mailman.enron.com; | |
| 10 | | AZIPPER_0011374 | Zipper, Andy | Attach | | | |
| 11 | | AZIPPER_0011375 | Zipper, Andy | Attach | | | |
| 12 | | AZIPPER_0011376 | Zipper, Andy | Attach | Enron | All Enron Worldwide@ENRON | |

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

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 the Quick nav search box in the upper right corner of Relativity, or use the keyboard shortcut **Ctrl+I**.

Note: Verify that the quick nav Ctrl+I keyboard shortcut works on custom pages. Contact [Customer Support](#) 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, the Esc key 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.

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 2-50, but the default is 20.
- The maximum number of searchable characters is 50.

1.2 Logging into RelativityOne

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

Note: For help with single sign-on error messages, please see the [SSO Troubleshooting console on page 25](#).

1.2.1 Logging in to RelativityOne with a password

1. Enter your **Username**.
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 the Authentication Guide.

1.2.2 Password

This method uses only a username and a password. Your RelativityOne admin provides you with the following:

- Login email address.
- Password request email.

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

To log in:

1. Navigate to the RelativityOne site.
2. Log in with your password. See [Logging in to RelativityOne with a password above](#)

1.2.3 Two-factor authentication

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

- Login email address.
- Password request email.

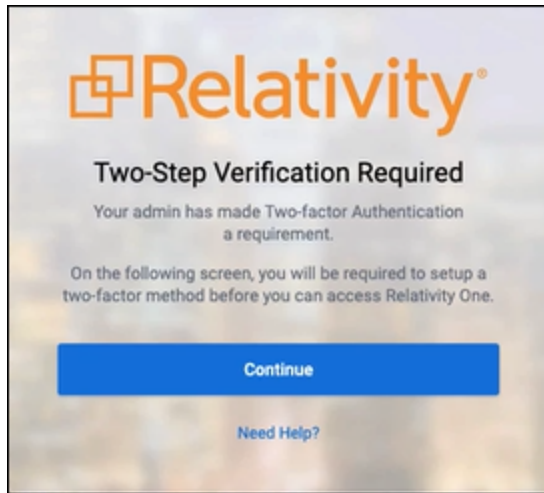
Prior to logging in, if you have not already, create your password. See [Creating or resetting a password on page 24](#).

Prior to logging in, if you have not already, download the required two-factor authentication app. When using the authenticator app for the first time, Relativity will need to connect your profile to the app.

To connect your authentication app,

1. Enter your username.
2. Enter your password.

3. On the Two-Step Verification Required step, click **Continue**.



4. Open your authenticator app on your device.
5. In your app, tap the button to add a new account.
6. Hold phone up and scan the QR code provided by Relativity.



If you are unable to scan the QR code, click the **Can't scan QR code?** link below the QR code. Once clicked, a code will appear. Enter the code into your authenticator app on your phone. Once entered into the authenticator app, you can continue to the next step.

7. Click **Next**.
8. Re-enter your email and password.
9. Enter the authentication code in the app.
10. Click **Next**.
11. Click **Done**.

To log in with an authenticator app method:

1. Navigate to the RelativityOne site.
2. Log in with your password.

3. Follow the instructions on the app or enter the authentication code from the authentication app.
4. Click **Next**.

To log in with the Relativity email method:

1. Navigate to the RelativityOne site.
2. Log in with your password. An **Authenticate Login** dialog appears. The system immediately emails you a passcode, and the passcode will be different each time.
3. Enter that value in **Passcode**.



4. Click **Login**.

1.2.4 OpenID Connect

This method requires you to have an OpenID Connect account. Your RelativityOne provides you with the following:

- OpenID Connect account username from the identify provider's side.
- Relativity OpenID Connect button name on the login page.

To log in:

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

1.2.5 SAML 2.0

This method requires you to have an account with SAML 2.0 authentication provider set up by your RelativityOne admin. Your admin provides you with a Relativity account with a SAML 2.0 login method.

To log in:

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

1.2.6 Creating or resetting a password

Use this procedure if you are logging in to RelativityOne for the first time or if you are 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 RelativityOne admin. In either case, the system sends you a new password email.

Note: If you are a system admin, the Password Reset Email will not 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:

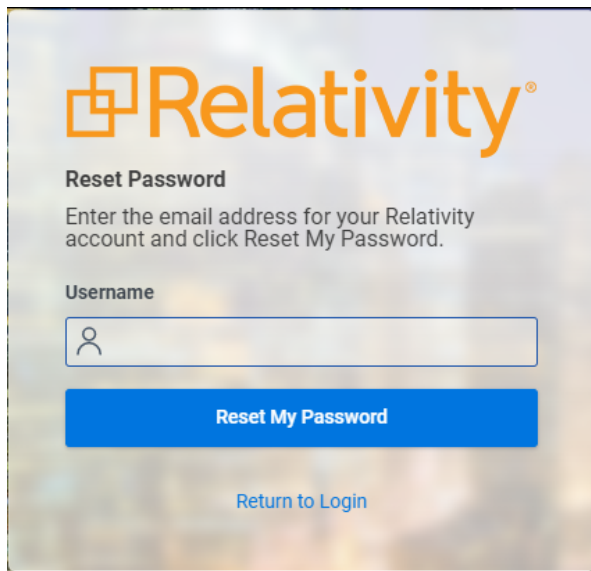
<https://ml14.testing.corp/Relativity/Identity/ResetPassword?token=74a572da-60e1-4058-2ffe-20b36965c0f9>

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 do not have to log in immediately.

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



3. Click **Submit**.
4. Click **Return to RelativityOne**.

1.3 SSO Troubleshooting console

The **SSO Troubleshooting console** eliminates the need for third-party tools when gathering essential information for troubleshooting error messages. It offers administrators actionable error messages to help them address configuration issues.

1.3.1 Considerations

- This console should not be utilized for auditing purposes.
- You must have the **Edit** permission on the Authentication Provider object to view the console.>
- The error log will only show the 10 most recent error messages.

1.3.2 Viewing the SSO Troubleshooting console

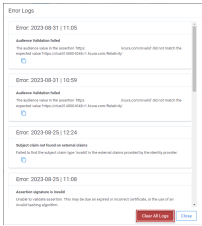
To view and manage the errors in the console:

1. Navigate and select your authentication provider



2. Click on the **Errors Log** button.

- 3. Review the errors and make the necessary updates to resolve the issue.
- 4. Once the errors have been resolved, clear the error log.



See this related pages:

2 Markups

Markups in Relativity refer to [highlights](#) and [redactions](#). You can add markups to documents that contain an image using the Image Viewer. When you open a document in the Native Viewer that has not been imaged, select **Image on the Fly** from the Document actions menu to image the document which can then be opened in the Image Viewer.

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

2.1 Highlights

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

2.1.1 Creating highlights

To create a highlight:

1. Click the **Highlight Color** icon.
Blue is the default color. Click the drop-down menu to select a different color.
2. Draw the highlight across the sections 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 33](#).

2.2 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 29](#)

When you create a redaction, it appears in the Markup Navigation Pane. See [Using the Markup Navigation pane on page 33](#).

2.2.1 Creating basic redactions

To apply a basic redaction to a document:

1. Click the **Redaction Type** icon.
The black redaction tool is the default. Click the drop-down menu to select a different tool. You can select from the following:
 - **Black Redaction**—creates a solid black box, like using a black marker. While you draw the box, a gray translucent fill appears.
 - **Cross Redaction**—creates a white redaction box black border and a black X from corner to corner.
 - **Text Redaction**—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 **Font Size**, and then select a new font size from the drop-down menu. You can right-click a textbox redaction to apply different text. See [Editing redaction text on page 32](#). The system admin determines which text options are available.

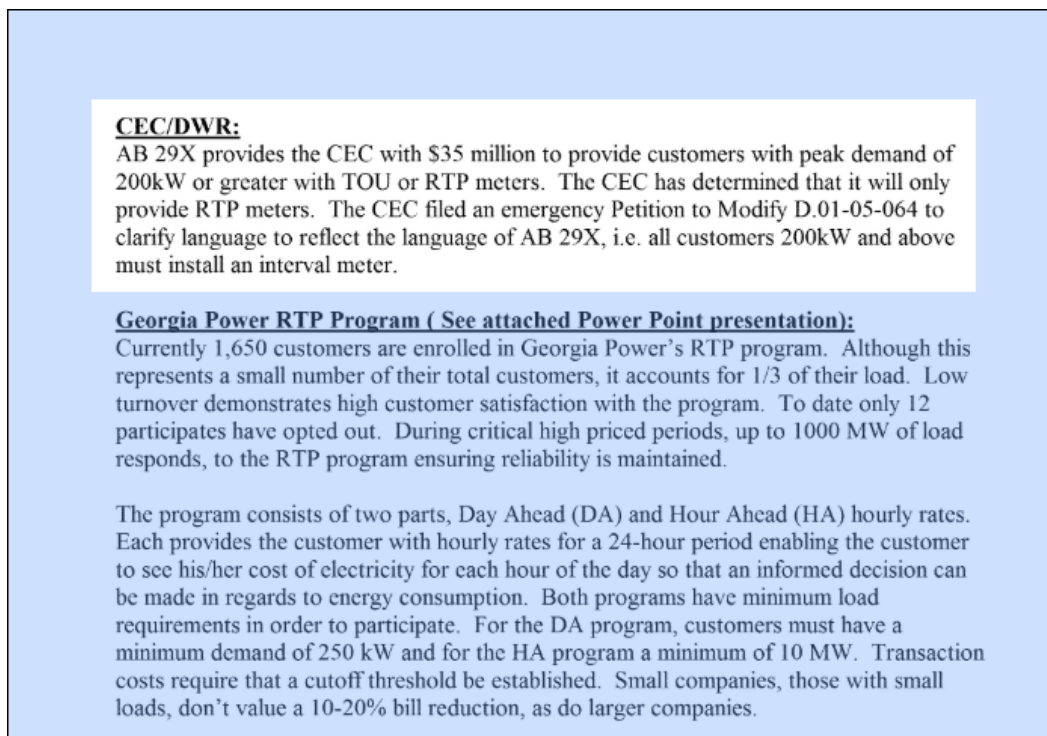
- **White Redaction**—creates a solid white box with a gray border. The gray border does not print or produce.

2. Draw the redaction boxes across the sections of the page you want to redact. You can draw in any direction.

2.2.2 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 the Redaction Mode icon and select **Inverse Redact** from the drop-down menu.
2. Draw the inverse redaction boxes across the sections of the page you do not want to redact.
A blue cast indicates where you will add the black redaction, and the white box indicates the area that is not redacted. You can move or re-size the white box using the controls. You can also highlight text that is not redacted.



2.2.3 Creating full-page redactions

A full-page redaction creates a redaction across the entire page. To apply a full-page redaction, click the **Redaction Mode** icon and select **Full-Page Redact** from the drop-down menu. The black full page redaction tool is the default. Click the Redaction Type drop-down menu to select a different tool. You can select from the following:

- **Black Redaction**—creates a solid black box, like using a black marker.
- **Cross Redaction**—creates a white redaction box with a black border and a black X from corner to corner.
- **Text Redaction**—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 32](#). The system admin determines which text options are available.
- **White Redaction**—creates a solid white box with a gray border. The gray border will not be printed or produced.

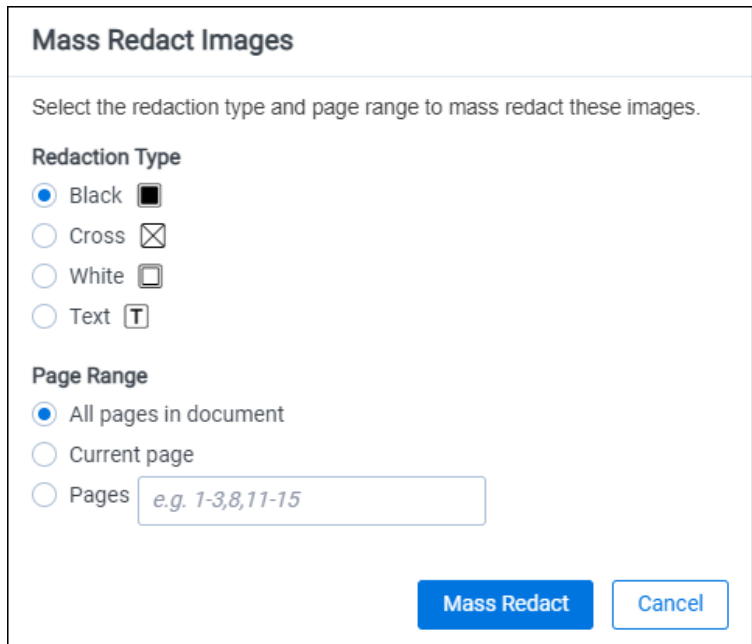
You can also create a keyboard shortcut to apply a full-page redaction. See [Creating keyboard shortcuts in the Admin guide](#).

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. Additionally, you can create new redactions on top of a full-page redaction if desired.

2.2.4 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:

1. Click the **Redaction Mode** icon and select **Mass Redact** from the drop-down menu.
The Mass Redact Options pop-up appears.
2. Select the type of redaction to apply. You can select from the following:



The dialog box is titled "Mass Redact Images". It contains the instruction "Select the redaction type and page range to mass redact these images." Below this, there are two sections: "Redaction Type" and "Page Range".

Redaction Type

- ☒ Black 
- ☐ Cross 
- ☐ White 
- ☐ Text 

Page Range

- ☒ All pages in document
- ☐ Current page
- ☐ Pages

At the bottom right, there are two buttons: "Mass Redact" (blue) and "Cancel" (white with blue border).

- **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 will not print or produce.
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.

2.3 Editing markups

To re-size a single markup,

1. Click inside the markup shape.
Blue dot controls appear on the corners and edges of the markup.

2. Select any control and drag to re-size the markup.
3. Optionally, you can also re-size markups using the arrow keys.
 - To re-size a markup in a larger increment, press **Shift** + the arrow key on your keyboard that points in the direction you would like to expand the markup.
 - To re-size a markup in a smaller increment, press **Ctrl + Shift** + the arrow key on your keyboard that points in the direction you would like to expand the markup.

You can move markups individually or as a set. To select multiple markups on a page,

click the **Selector** icon 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. To move a markup in a larger increment, press the arrow key on your keyboard that points in the direction you would like to move the markup. To move a markup in a smaller increment, press **Ctrl** + the arrow key on your keyboard that points in the direction you would like to move the markup.

2.4 Deleting markups

You can delete markups individually or as a set. To delete a single markup, right-click a markup and click **Delete**. You can also press the **Delete** key with a markup selected and click **Yes** on the Confirm Delete pop-up. For Mac users, press **Fn + Delete**.

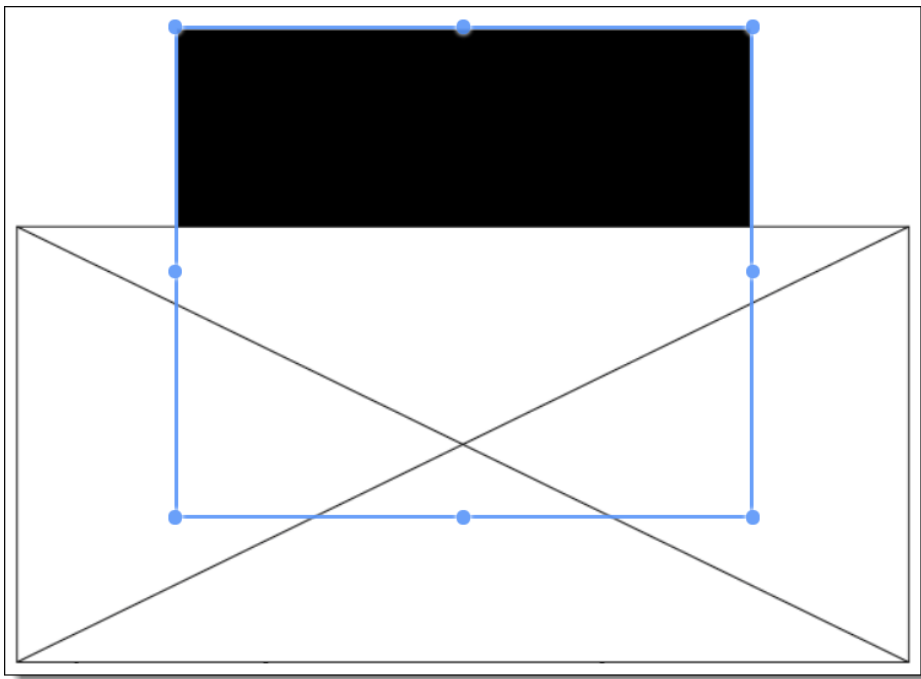
To delete multiple markups:

1. You can use any of the following methods to select markups for deletion:
 - Left-click and drag the selection box over the markups you wish to delete.
 - Hold down on **Ctrl** on your keyboard, and left-click on each markup you wish to delete.
 - Right-click on a markup after selecting any other markups you would like to delete.
2. Select **Delete** from the right-click menu.
The Delete Markups modal displays.
3. Verify that you wish to delete the number of markups displayed in the modal and click the **Delete X Markups** button.
The selected markups are deleted.

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.

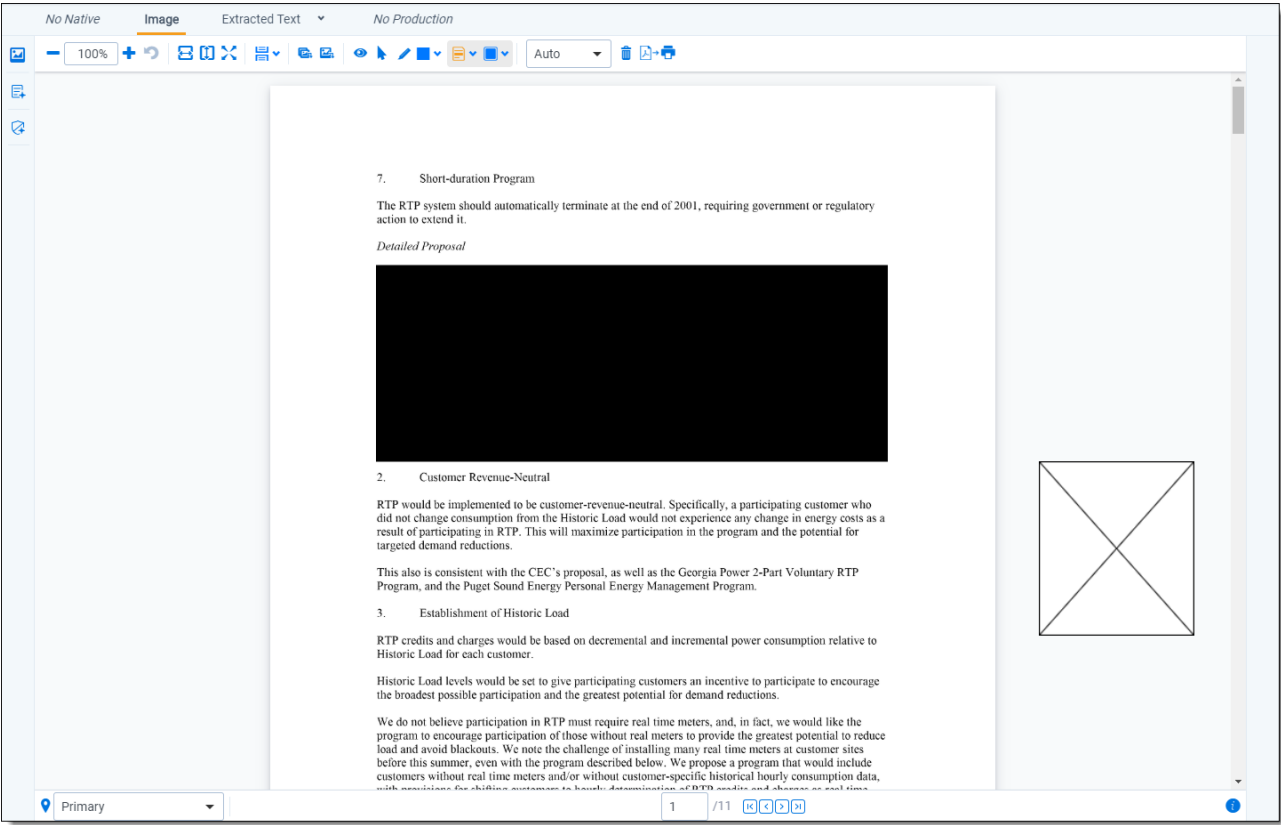
2.4.1 Working with overlapping markups

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.



2.4.2 Working with markups outside of page boundaries

If you have markups that exist outside the boundaries of an image, such as those created by custom applications, they will render in their currently saved coordinates in the Viewer. Interacting with the markup by attempting to move or select it will move the markup within the page boundaries. This change is saved and audited in the workspace.



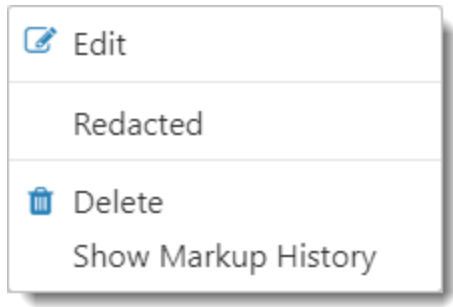
2.4.3 Editing redaction text with a markup set

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:

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



2.4.4 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 Edit 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.

2.4.5 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 redactions.
You can press **Ctrl** or **Shift** and click to select multiple text box redactions.
2. Click the Font Size drop-down menu 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.

2.5 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:

1. Click the **Delete Highlights** icon.

Mass Delete Markups

Select the markup type(s) and page range to delete all associated markups on this document.

Markup Types

☐ Non full-page redactions
 ☐ Full-page redactions
 ☐ Highlights

Page Range

☒ Current page
 ☐ All pages in document
 ☐ Pages

Delete Markups

Cancel

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 **Current 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.

2.6 Controlling markup visibility

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

2.7 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 user performed the action .

2.8 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 the **Markup Sets** icon 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.

1

- 8 of 8

10

per page

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| Page Number | Markup Type | Markup Sub Type | Markup Text | Full Page | Markup Set |
|-------------|-------------|-----------------|-------------|-----------|------------|
| = ▾ Filter | Filter | (All) ▾ | Filter | (All) ▾ | (All) ▾ |
| 1 | Redaction | Black | | | Primary |
| 1 | Redaction | Cross | | | Primary |
| 1 | Redaction | Text | Redacted | | Primary |
| 2 | Highlight | Blue | | | Primary |

Primary ▾

1 / 11

⏪

⏴

⏵

⏩

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

Relativityone

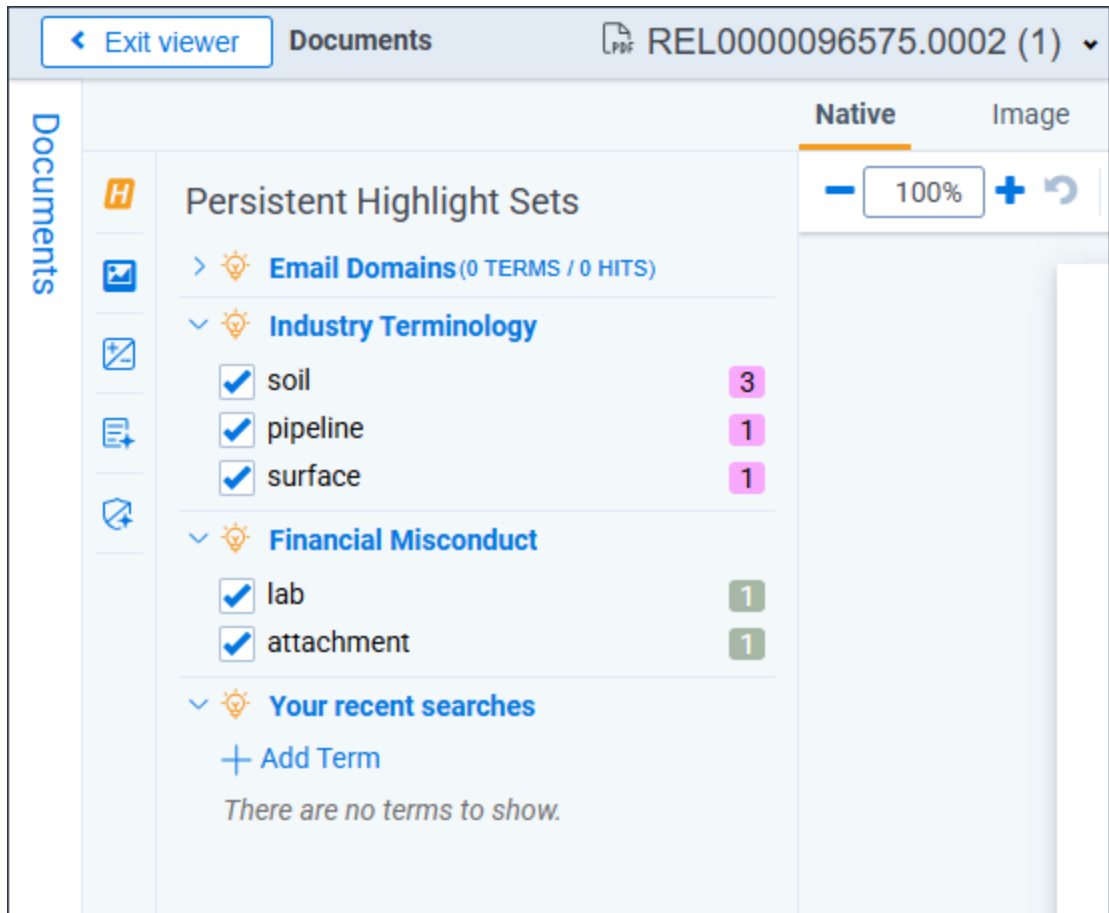
User Guide

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3 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 Sets pane of the Viewer, you can see all sets saved in a workspace and apply or hide term highlights in the document you are reviewing.

If a document you are 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 not 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.

3.1 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 Sets pane of the Viewer.

The following persistent highlight set includes several terms with highlight color-coding. See [Color-coding persistent highlights on page 45](#) for more information.

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

Persistent Highlight Set Layout

Edit

Delete

Back

Edit Permissions

View Audit

Persistent Highlight Set Information

Name

Investments

Order

100

Source

Text

Highlight Fields

Terms

10;11;structure
3;4;construction
8;5;liability
4;2;property
7;16;credit
3;16;expense

Record History

System Created On


7/28/2020 12:39:45 PM CDT



System Last Modified On

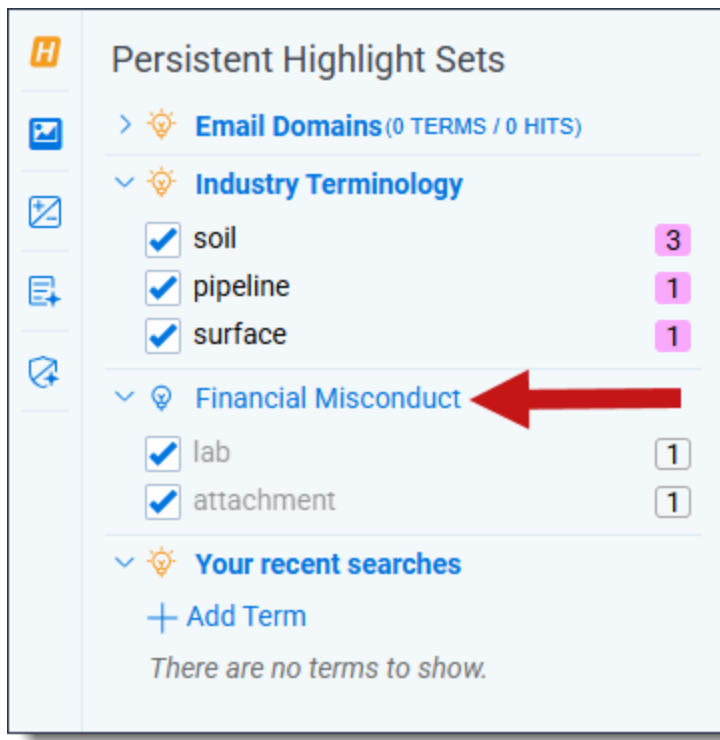
7/28/2020 12:39:45 PM CDT

3.1.1 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 Sets pane, click the **Persistent Highlighting** icon in the left drawer.

Click the  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 Sets pane and highlighted in the document. Click a persistent highlight set's name

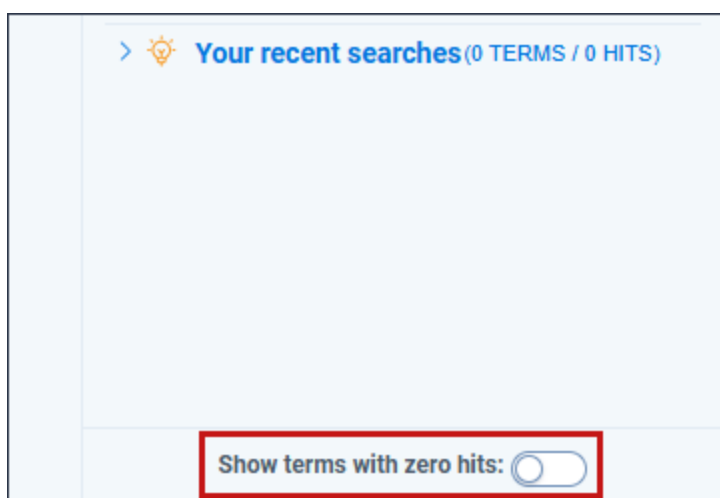
or the  icon to hide all term highlights from the set in the Viewer. When a persistent highlight set's icon is  and the terms appear partially transparent in the Persistent Highlight Sets pane, the term highlights for the set are hidden in the Viewer.



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.

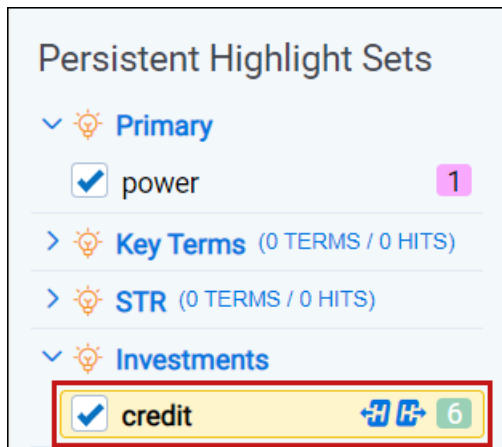
While using persistent highlight sets, you can determine whether terms that do not have any hits display in the Persistent Highlight Sets pane or not. If the Show terms with zero hits option is enabled, all terms in a persistent highlight set, including those with zero hits display in the Persistent Highlight Sets pane. If the Show terms with zero hits option is disabled, then any terms in a persistent highlight set that are not present in the current document will not display in the Persistent Highlights Set pane. For example, if you created a set named Investments that contains five highlight terms and have the Show terms with zero hits option disabled, only three of the terms show in the pane for a particular document, because the other two terms have no hits and thus, are not present in the document.


Note: The Show terms with zero hits option does not support highlight fields that are based on search term reports. While the persistent highlight set displays in the Persistent Highlight Sets pane, the highlight field terms do not display unless there is at least one search hit regardless of whether Show terms with zero hits option is enabled or disabled.



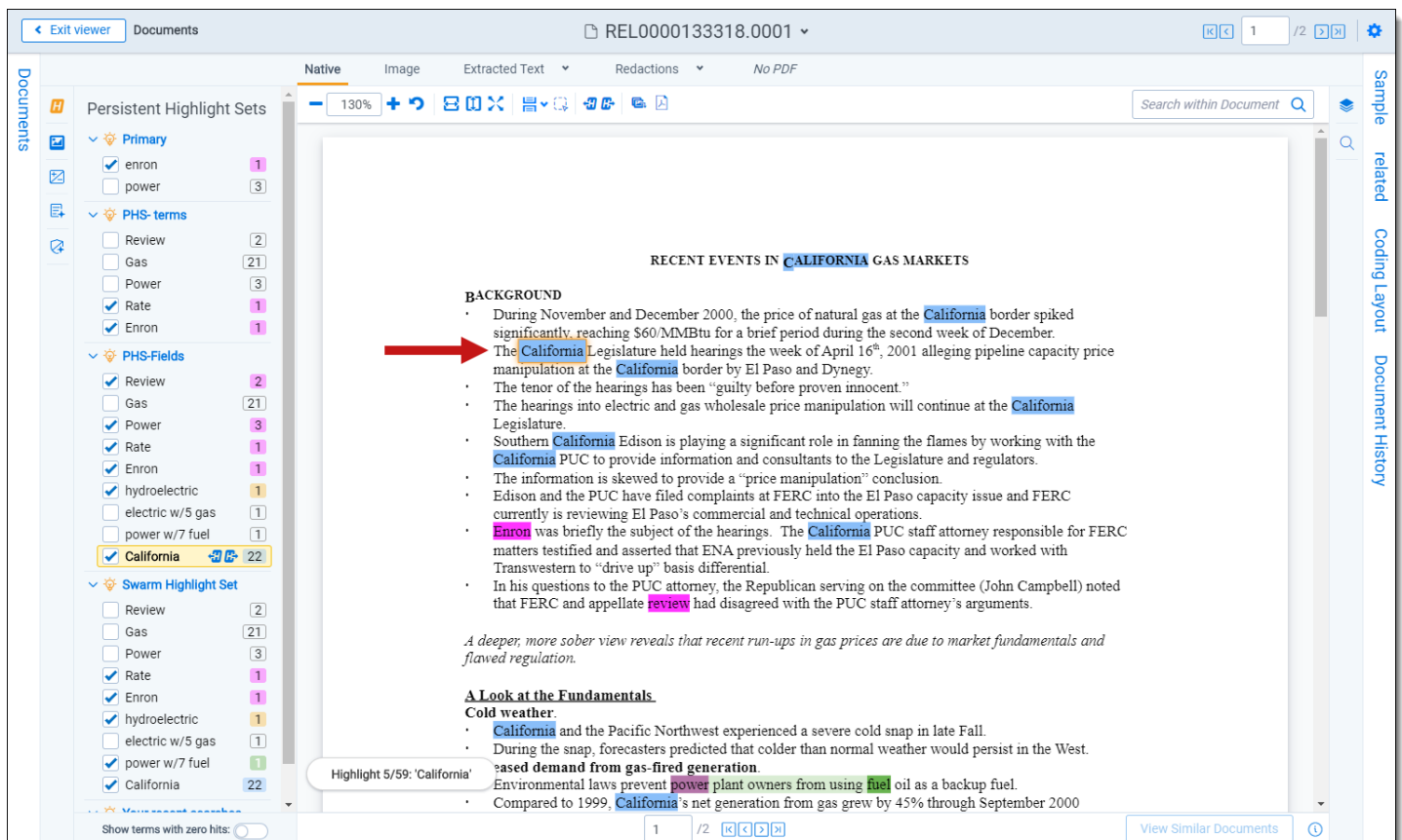
3.1.2 Navigating persistent highlight hits in the Viewer

You can navigate through the hits for a persistent highlight set or for a term while viewing a document in the Viewer. Click on either the persistent highlight set or the desired term in the Persistent Highlight Sets pane and the **Go to Next/Previous Highlights** icons display in the row.

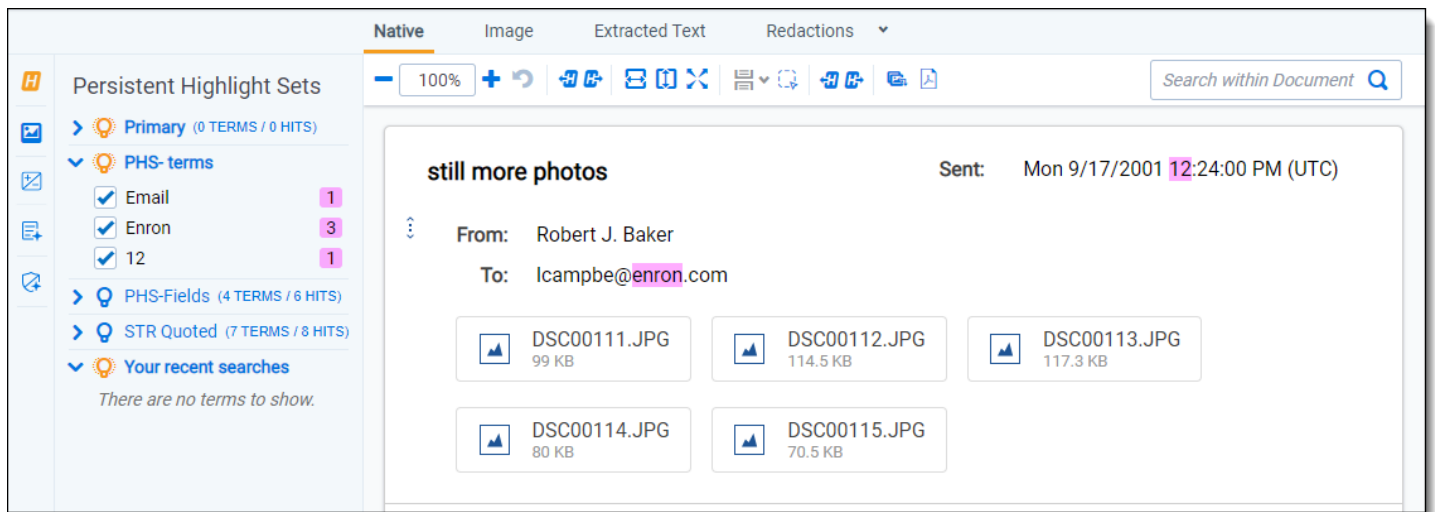


You can use the Next/Previous icons to cycle through the hits for either the persistent highlight set or the highlighted term. Regardless of where you are in a document, when you click the Next icon  for the first time, you will be taken to the first highlight in the document for that persistent highlight set or term. Even if you have moved past it while browsing the document.

Clicking the Next/Previous icons also emphasizes the actively navigated highlight with an orange glow to help you track which one is active.



When you select a persistent highlight term in the Persistent Highlight Sets 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.



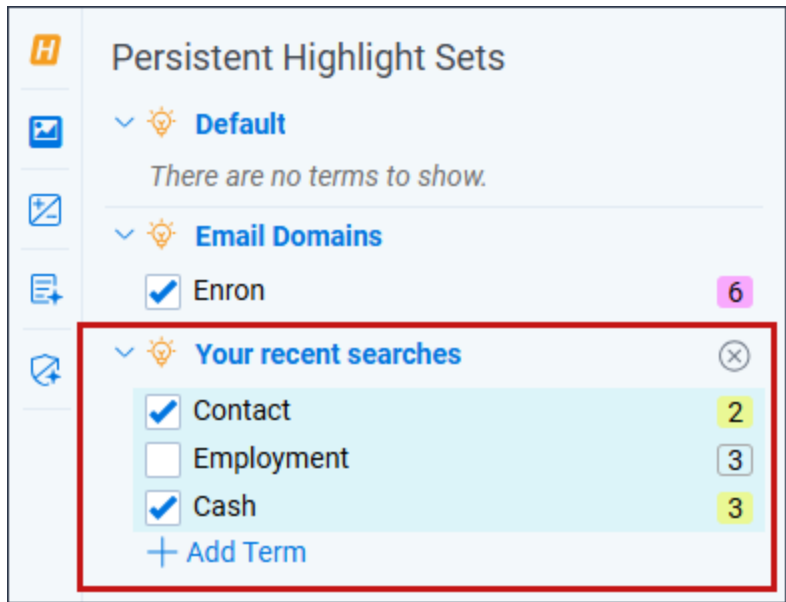
The number of terms and hits is listed to the left of the persistent highlight set's name. It is possible to have many highlight sets enabled but no highlights appear in a document.

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


- Showing or hiding the Persistent Highlight Sets 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.

3.1.3 Recent searches in the Persistent Highlight Sets pane

In addition to accessing persistent highlight sets, you can also search for terms and highlight any matches temporarily using the Your recent searches section. You can perform either dtSearch or Keyword searches from this section.




You can also search using the search bar on the document list. The search bar lets you choose a search index, find search term matches, and then view matches in the Your recent searches section across different documents. The search term matches stay highlighted while navigating between documents as long as you do not remove the search condition from the search panel or log out of Relativity.

| | | | |
|------------------|--------------------|--|---|
| Keyword Search ▼ | Enter Search Terms |  Search |  Clear |
|------------------|--------------------|--|---|



To perform either a dtSearch or Keyword search in the Your recent searches section:

1. Optionally, click on the **Persistent Highlighting** icon to expand the Persistent Highlight Sets pane.
2. Click the **+ Add Term** button.
3. Enter the desired dtSearch or Keyword search terms in the textbox.
4. Click the **Confirm** icon or press **Enter** on your keyboard.
The Your recent searches section updates with the number of matches and any matches are highlighted in yellow in the current document.

Optionally, you can select a search in the Your recent searches section and use the Next/Previous icons to cycle

through the matches. Regardless of where you are in a document, when you click the Next icon  for the first time, you will be taken to the first highlight in the document for that persistent highlight set or term. Even if you have moved past it while browsing the document.

3.1.4 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**  icons on the Viewer toolbar.

The **Go to Previous Highlight** and **Go to Next Highlight** icons only navigate between terms enabled in the Persistent Highlight Sets pane.

When navigating through a document's highlighted terms, the following notification displays in the bottom-left to inform you that you have reached the beginning or end of the document and there are no more highlights.

Robert J. Baker, Ph.D.
Horn Professor
Department of Biological Sciences
Texas Tech University
Lubbock, TX 79409
phone: (806) 742-2702
fax: (806) 742-2963
rjbaker@ttu.edu

EDRM **Enron Email** Data Set has been produced in EML, PST and NSF for
licensed under a Creative Commons Attribution 3.0 United States License
<<http://creativecommons.org/licenses/by/3.0/us/>> . To provide attribution, pl

Reached the end of the document.




3.1.4.1 Actively navigated and inactive highlights

To support advanced highlights within persistent highlight sets, two types colors can be available in the Viewer - actively navigated 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: Beginning in Relativity 11.3.1, the auto-contrast feature has been added to color-coding persistent highlights. This feature automatically determines the text color based off the background color you select to ensure readability no matter which colors are selected. For example, if the background color is closer to black, the text will automatically be white or if the background color is closer to white, the text will automatically be black.

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 | Highlight Color | Number |
|--------------|-----------------|--------|
| [Default] | | 0 |
| Black | | 1 |
| Dark red | | 2 |
| Dark green | | 3 |
| 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 |
| Light green | | 17 |
| Light blue | | 18 |
| Light yellow | | 19 |
| Light purple | | 20 |
| Light red | | 21 |
| Light orange | | 22 |
| Purple | | 23 |

| Color name | Highlight Color | Number |
|-------------|---|--------|
| Orange |  | 24 |
| Dark purple |  | 25 |
| Dark orange |  | 26 |

3.1.5 Persistent highlight set behavior across Viewers

Note the following regarding persistent highlight set behavior as the reviewer moves from document to document, changes Viewers, 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 will not display changes made to a persistent highlight set, such as terms selected or unselected, in the pane of the main Viewer. However, Persistent Highlight Sets pane settings remain the same in the standalone Viewer as the reviewer goes from doc-to-doc.
- The Persistent Highlight Sets pane maintains its current state when you swap Viewer panes.
- The Persistent Highlight Sets pane in the Extracted Text Viewer and Native Viewer are independent of each other. A change made to the pane in the Extracted Text Viewer is not automatically reflected when the reviewer switches to the Native Viewer and back.
- Advanced persistent highlighting, available when using a search term report as a highlight field source, is only available in the Native and Extracted Text Viewer. See [Using the highlight fields source on page 47](#).

See the Viewer documentation in the Admin Guide.

3.1.6 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 47](#).

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.

The screenshot shows the RelativityOne interface. On the left, the 'Persistent Highlight Sets' panel is open, showing three sets: 'Primary' (2 terms, 4 hits), 'PHS-terms' (5 terms, 28 hits), and 'PHS-Fields'. The 'PHS-Fields' set is expanded, showing a list of terms with checkboxes and hit counts: Review (2), Gas (21), Power (3), Rate (1), Enron (1), hydroelectric (1), electric w/5 gas (1), California (22), and power w/7 fuel (1). Below this, there is a 'Swarm Highlight Set' (9 terms, 53 hits) and 'Your recent searches' (no results shown). The main document viewer shows a document titled 'RECENT EVENTS IN CALIFORNIA GAS MARKETS'. The document content includes a 'BACKGROUND' section with a bulleted list of events, a paragraph about a deeper view of gas prices, and two sub-sections: 'A Look at the Fundamentals' and 'Cold weather'. The 'Cold weather' section includes a bulleted list of events. The 'Increased demand from gas-fired generation' section includes a bulleted list of events. The document is displayed with a zoom level of 130% and a search bar at the top right.

3.2 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 47](#).

1. Navigate to the **Persistent Highlight Sets** tab.
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.

Persistent Highlight Set Information

Name*

Order*

Source*
☐ Highlight Fields
☐ Terms

[Manage](#)

Highlight Fields

Terms

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.

3.2.1 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 the **Select** button 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 47](#).

Note: If your search terms report is run against a dtSearch index with a customized alphabet file, the hits on the STR may not match the highlights rendered in the Viewer. Depending on how the alphabet file has been customized, you may see fewer highlight hits rendered in the Review Interface.

- **Terms** - enter terms you wish to highlight and select the color code to distinguish them in the Viewer. See [Entering highlight terms below](#).

3.3 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 *

Primary

Order *

0

Source *

☐ Highlight Fields
 ☒ Terms

Manage

Highlight Fields

Select

Terms

10;16;petroleum
 10;16;gasoline
 10;16;trad*
 10;16;credit
 10;16;internal

3.3.1 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.

Note: Beginning in Relativity 11.3.1, the auto-contrast feature has been added to color-coding persistent highlights. This feature automatically determines the text color based off the background color you select to ensure readability no matter which colors are selected. For example, if the background color is closer to black, the text will automatically be white or if the background color is closer to white, the text will automatically be black.

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.

Note: The opacity level of the highlights can be adjusted by editing the value of the **ViewerHighlightStyleDefault** instance setting.

The following table includes available color codes.

| Color name | Highlight Color | Number |
|------------|-----------------|--------|
| [Default] | | 0 |
| Black | | 1 |

| Color name | Highlight Color | Number |
|--------------|-----------------|--------|
| Dark red | | 2 |
| Dark green | | 3 |
| 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 |
| Light green | | 17 |
| Light blue | | 18 |
| Light yellow | | 19 |
| Light purple | | 20 |
| Light red | | 21 |
| Light orange | | 22 |
| Purple | | 23 |
| Orange | | 24 |
| Dark purple | | 25 |
| Dark orange | | 26 |

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.

3.3.2 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. Quotation marks are compatible when using highlight fields as a source however. Using highlight fields as a source can result 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:
 - 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.

3.4 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** option, and then click the **Select** button to open the Select items - Highlight Fields modal. 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 right arrow to move it the right section. Once all of the desired fields have been selected, click **Apply**. The field appears on the layout.

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

Select Items - Highlight Fields

1

- 10 of 39

10

per page

<<<<>>>>

| # | <input type="checkbox"/> | Name | Object Type |
|---|--------------------------|-------------------------------------|------------------------------------|
| | | <input type="text" value="Filter"/> | <input type="text" value="(All)"/> |
| 1 | <input type="checkbox"/> | OCR Results | Document |
| 2 | <input type="checkbox"/> | Domains (Email BCC) | Document |
| 3 | <input type="checkbox"/> | Domains (Email CC) | Document |
| 4 | <input type="checkbox"/> | Domains (Email From) | Document |
| 5 | <input type="checkbox"/> | Domains (Email To) | Document |
| 6 | <input type="checkbox"/> | Imaging Set | Document |

0

- 0 of 0

10

per page













<<<<>>>>

| # | <input type="checkbox"/> | Name | Object Type |
|----------|--------------------------|-------------------------------------|------------------------------------|
| | | <input type="text" value="Filter"/> | <input type="text" value="(All)"/> |
| No data. | | | |

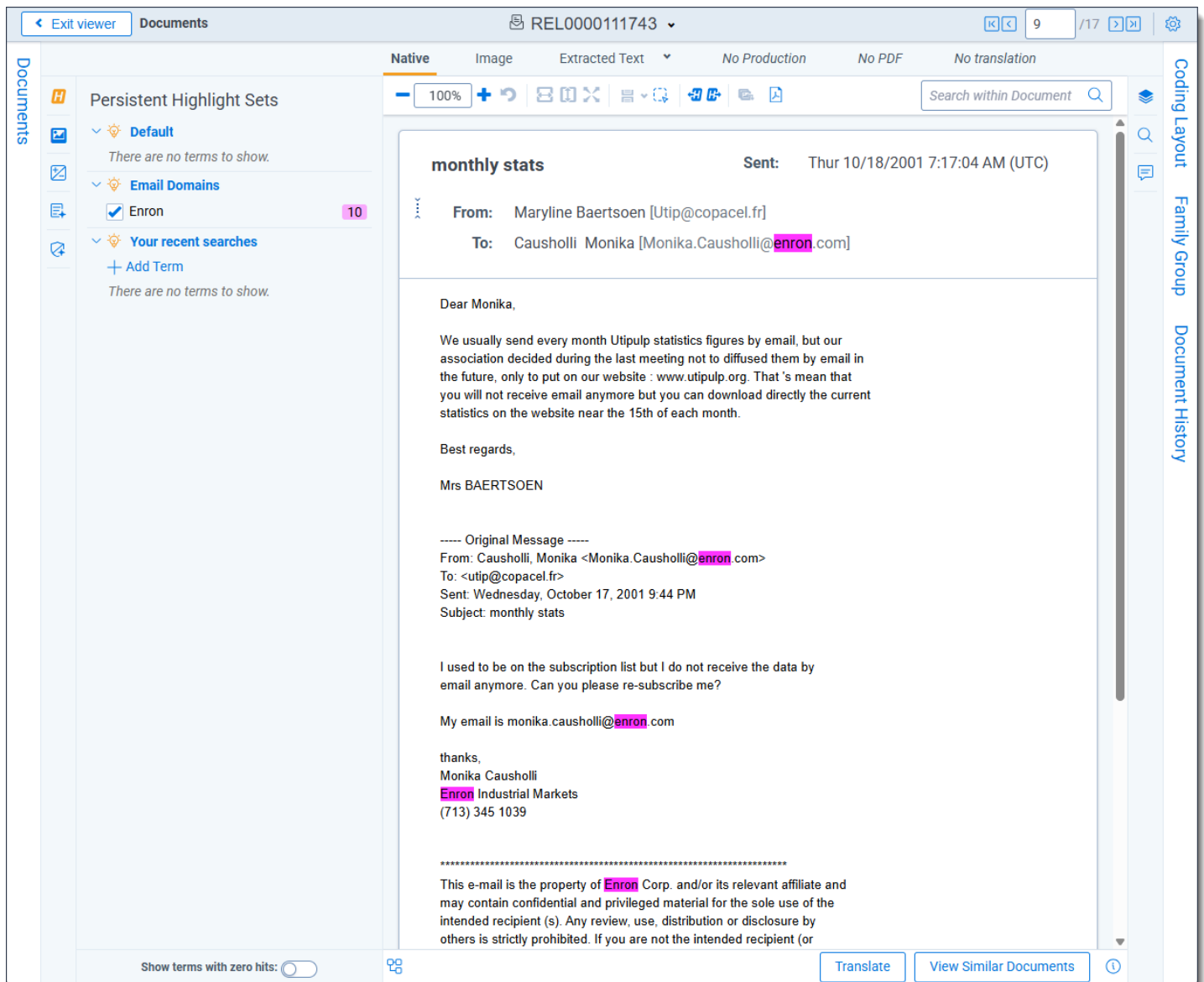
Apply

Cancel

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"/> | Artifact ID | | | Control Number | STR - Search term report | Relativity Native Type |
|---|--------------------------|--|---|---|---|---|------------------------|
| | | <div><div>= ▼</div><div>Filter</div></div> | | | <div>Filter</div> | <div>Filter</div> | <div>Filter</div> |
| 5 | <input type="checkbox"/> | 1048583 |  |  |  REL0000073644 | 12 attach~ Email Enron enron w/5 data Gas | Outlook Email |
| 6 | <input type="checkbox"/> | 1102379 |  |  |  REL0000110895 | Email Enron enron w/5 data | Outlook Email |
| 7 | <input type="checkbox"/> | 1079453 |  |  |  REL0000098527 | Email Enron enron w/5 data | Outlook Email |
| 8 | <input type="checkbox"/> | 1134400 |  |  |  REL0000131183 | attach~ David Email Enron enron w/5 data Power | Outlook Email |

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.



3.4.1 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.
- 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 53](#) 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.
- dtSearch operators can be used to highlight searches when used for a Persistent Highlight Sets in the Native Viewer. 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 Viewer. The highlights for these searches use the active and inactive highlighting functionality. Actively navigated 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 53](#) for information on supported syntax.
- Any operator in quotes will be treated as literal by the Viewer search. For example, stemming “~” and wild-card “*” 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.

3.5 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.

3.5.1 Using terms search

Avoid the following when writing searches for persistent highlighting:

Persistent Highlight Set Information

Name*

Order*

Source*

☐ Highlight Fields

☒ Terms

Manage

Highlight Fields

Select

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]**.

3.5.2 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

Select

Terms

- Enter terms exactly as they appear in the document.
- 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.
- dtSearch operators can be used to highlight searches when used for a Persistent Highlight Sets in the Native Viewer. 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 Viewer. The highlights for these searches use the active and inactive highlighting functionality. Actively navigated 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.
- In Search Terms Reports, you can the Dictionary Search function to identify search terms using stemming or fuzziness. Copy the list of terms returned in this search. Paste them in the Add Terms box on the Search Terms Report form. Doing this enhances your search term list, while avoiding errors caused by special characters.
- 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.

4 Search terms reports

5 Search terms reports

You have reached an outdated topic. See https://help.relativity.com/RelativityOne/Content/Relativity/Search_term_reports/STR.htm for information on search term reports.

6 Searching

Relativity includes flexible search features designed to facilitate the document review process. These 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.

6.1 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 choose the best format for different field types. See the Searching Guide for more information.

6.2 Search panel

The search panel is available for the Document list and for many other tabs in Relativity. It allows you to build complex searches by rearranging and visualizing nested conditions by dragging and dropping them. Conditions can be easily set and organized into logic groups, with the logic display at the top of the panel updating automatically to reflect any changes made. You can access your dtSearch and keyword search indexes and fields within the workspace when creating a search.

With the search panel, the search conditions tool allows you to refine searches by selecting fields, operators, and values to customize queries. This tool can be used independently or in conjunction with keyword searches, dtSearches, Analytics, or Cluster visualization. See the Searching Guide for more information.

6.3 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. See the Searching Guide for more information.

6.4 Saved searches

Saved searches give you 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.

6.5 dtSearch

Available on the Documents tab, you can use dtSearch's advanced searching functionality to run queries with proximity, stemming, and fuzziness operators, along with basic features such as Boolean operators and wildcards.

System administrators 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 you modify the document search sets used to create them. See the Searching Guide for more information.

6.6 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.

6.7 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.

6.8 Additional features

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


Keyword Search

Enter Search Terms

Search

Clear

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.

You can also use the search bar to view recent searches. Click in the search bar to see up to 10 of the most recent searches from any index in descending order, with the most recently run search first.

Keyword Search

Enter Search Terms

Search

Clear

There are no documents

1 search 3

2 search 2

3 search 1

Clear Recent Searches

page

«

<

>

»

≡

Select any search from the list to run that search. To clear the list, click **Clear Recent Searches**.

6.9 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.

6.9.1 Setting up search conditions

6.9.1.1 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 by selecting the desired field or by choosing a field category and then selecting the desired field.
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.

6.9.1.2 Setting up search conditions in the Search browser

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

1. Click the **Saved Search** icon 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.

6.9.1.3 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 list. For example, **these conditions**.
4. Click **Add Condition**.
5. Select the condition from the **Add Condition** drop-down list. 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.

6.9.2 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. |

| Scenario | Result |
|---|--|
| 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. |

6.9.3 Frequently asked searching questions

This section includes frequently asked questions from Relativity users.

6.9.3.1 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.

6.9.3.2 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.

6.9.3.3 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.

6.9.3.4 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.

6.9.3.5 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 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. Commonly used tabs can be added to the Sidebar so that they can conveniently be accessed at any time.

Note: RelativityOne includes a tool that allows you to choose a workspace to use as a source template for tab structure and then lets you apply that template across multiple workspaces in your instance.

You can also apply any workspace 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.

7.1 Creating and editing tabs

Note: We recommend avoiding sensitive data in tab names. You can secure new tabs by overriding inherited security settings and applying .item-level security.

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 the **Edit** icon in the row of the tab you would like to edit.
3. Complete the fields on the form. See [Fields below](#).
4. Click **Save**.

7.2 Fields

Information on the fields in the Tab Information and Tab location are described below.

7.2.1 Tab Information

Tab Information

Name *

Tab Type *

Object ▼

Object Type *

▼

Set as Default Tab *

☐

Visible

☒

Relativity Applications

Select

- **Name** - the tab's name. This field must be between 1 and 50 characters. Be as concise as possible when naming tabs.
- **Tab Type** - determines the type of tab you want to create:
 - **Object** - creates a tab for a non-document object in your workspace.
 - **Parent** - establishes the tab as a parent tab. Existing tabs can then be set as children of the parent tab, which causes them to display in the Sidebar's fly-out menu or in the Tab strip when the parent tab is currently selected. Selecting this option changes the layout by hiding the Object Type and Set as Default fields.
 - **External** - link to any URL or object type in Relativity.

Note: 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.

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 [Tabs on the previous 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> |

| Text Replacement Option | Replacement Text |
|----------------------------|--|
| %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> |

- **Object Type** - determines which object's information is displayed in the tab for those specified as **Link Type = Object**.
- **Set as Default Tab** - toggle on to make this tab serve 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 instead.
- **Visible** - toggle on to display this tab from the Sidebar, Tab strip, and/or Quick nav.
- **Relativity Applications** - add this tab to a Relativity application. Clicking the **Select** button brings up a list of available applications.

7.2.2 Tab Location

Tab Location

Show in Sidebar * ☐

Parent

Order * View Order

- **Show in Sidebar** - toggle on to add this tab to the Sidebar. Depending on the number of tabs that have already been added to the Sidebar, the Order value assigned to this tab, and your browser's resolution, the tab may be displayed in the More menu if it does not fit into the current Sidebar.
- **Parent** - select a parent tab to assign the current tab as a child tab. The current tab will display in the fly-out menu for the parent tab.
- **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 displays at the top of the Sidebar. The highest-numbered tab displays at the bottom of the Sidebar or in the More menu. 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).

7.3 Nesting children 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 **Tab Type** of **Parent** or edit an existing tab.
2. Click the **Edit** icon 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 child tab you wish to nest. Hover your cursor over the parent tab to display the nested child tabs in a fly-out menu.

8 Viewer

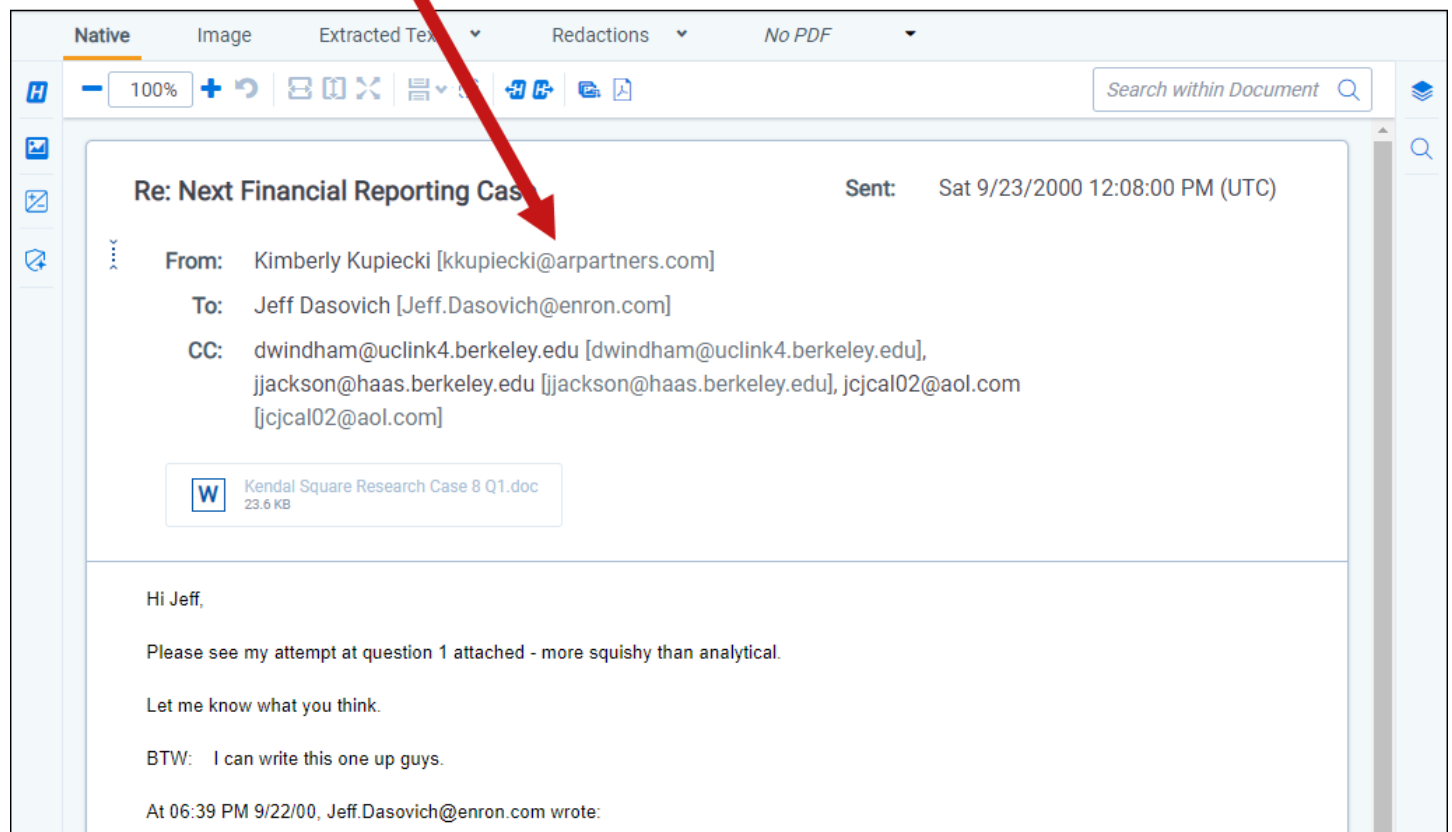
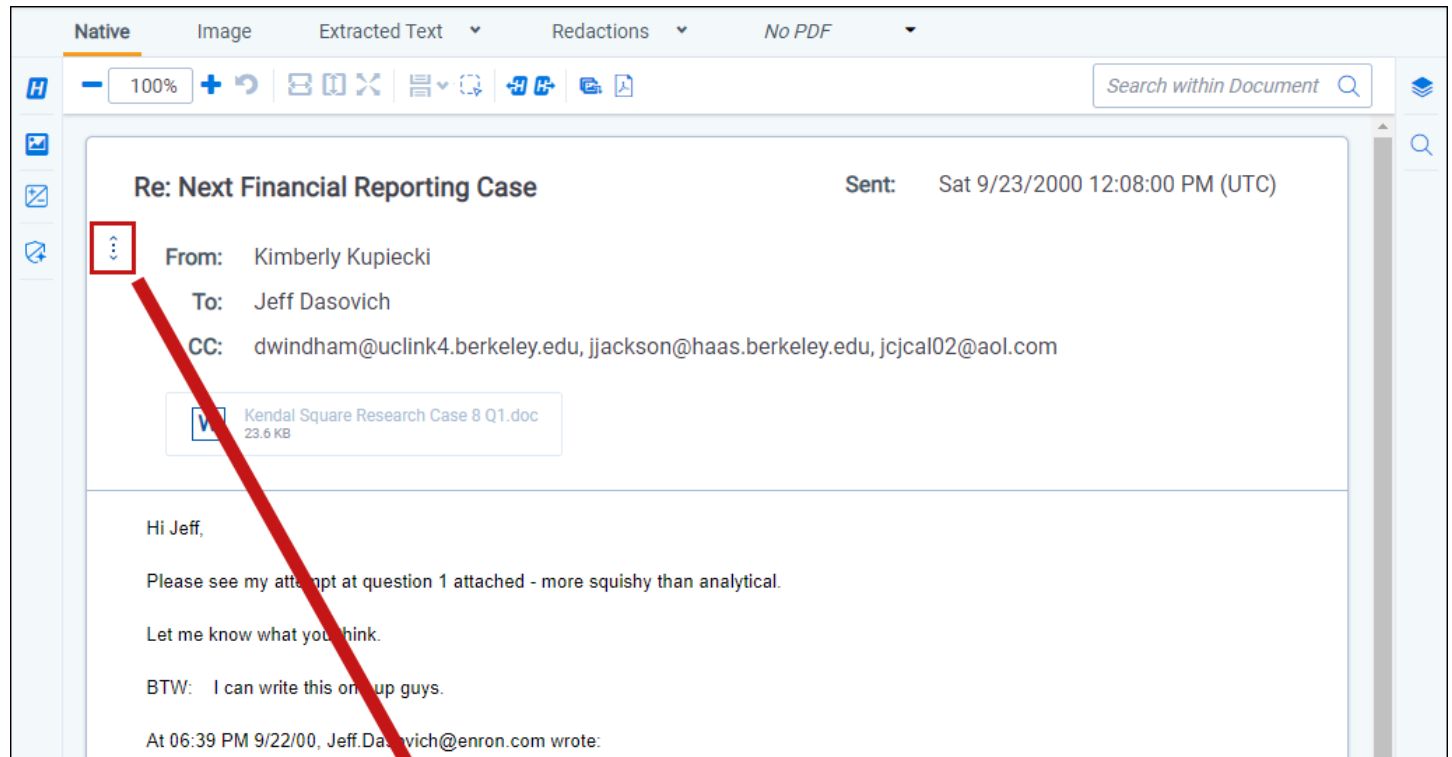
The Review Interface displays workspace documents. You can use the Viewer type tabs to toggle the loaded formats of documents, such as Native Viewer, Image Viewer, Extracted Text Viewer, or Productions Viewer. Using the Viewer, you can control the form of document that displays in the interface. If a document has not been imaged, you can image documents on-the-fly in the Viewer.

Note: Using your internet browser to zoom to any size other than 100% while using the Viewer is not supported and can cause unexpected behavior.

If you do not see the document in the Viewer, it either has not been loaded to the workspace, its conversion failed, or you do not have permission to see it.

8.1 Native Viewer

Note: In the Native 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.



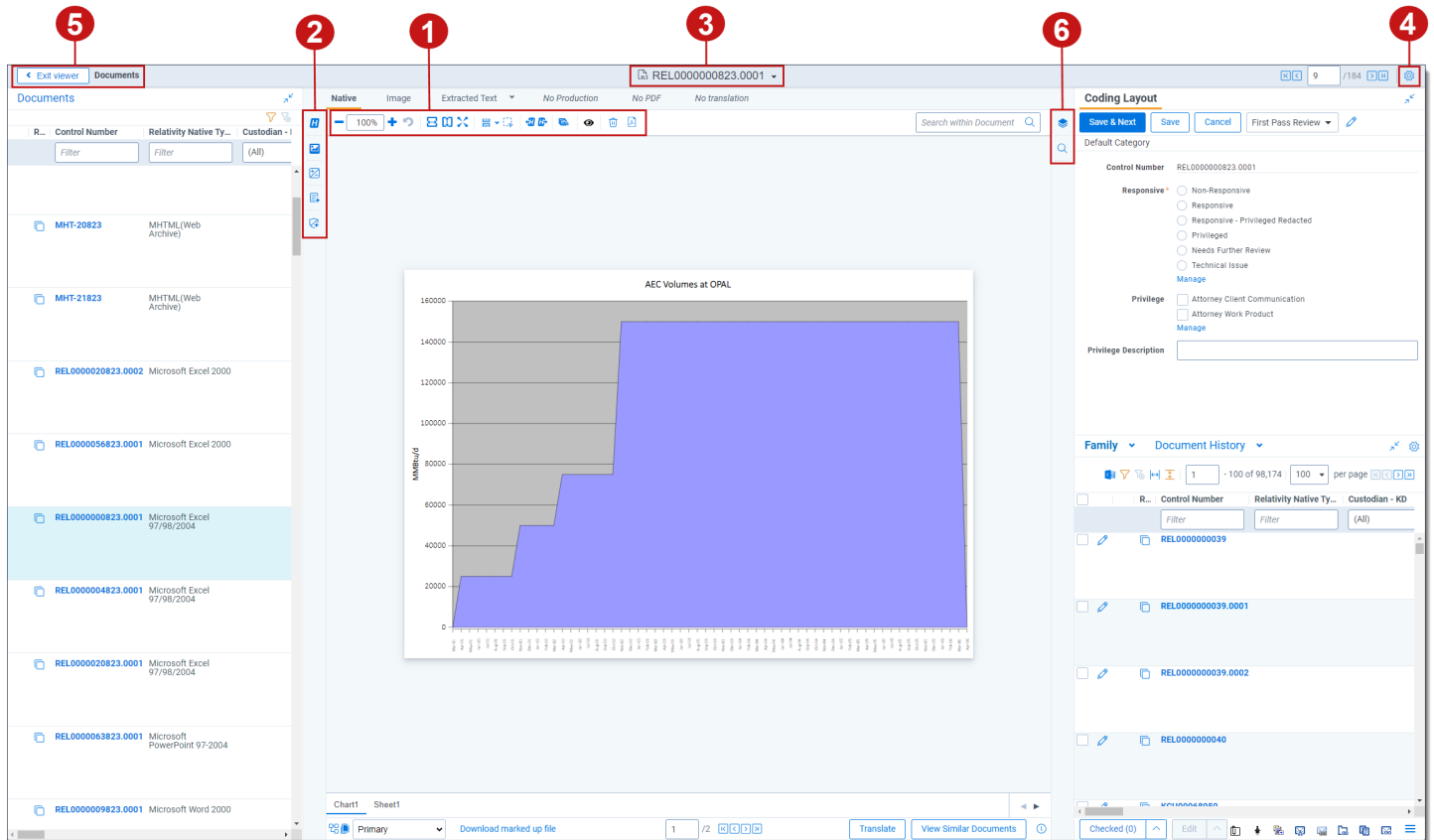
The Native Viewer displays an HTML rendering of the document that is as close to the original version of the document as possible. With the Native Viewer, you can:

- Navigate through a single document and between documents in a document set.
- Conduct text searching.
- Highlight text to copy and paste.
- Zoom, arrange, and save pages that you review in the Native Viewer.
- Print single documents by saving the document as a PDF. To learn more, see [Create PDF](#).

Note: The Viewer displays PDF text by mapping the character codes to Unicode in most cases. To check whether PDF text has been properly encoded and will display correctly in the Viewer, copy the text in the original PDF file and paste it into another application like Microsoft Word or Notepad. If the pasted text does not display correctly, the PDF is not properly encoded. If the pasted text displays correctly in another application but not in the Viewer, contact [Support](#) for assistance.

8.1.1 Navigating the Native Viewer

The Native Viewer offers several ways of viewing and working with documents. There are options available in the following sections of the Viewer:



1. [Native Viewer toolbar options](#)
2. [Left drawer Viewer options](#)
3. [Document actions menu](#)
4. [Viewer settings menu](#)

5. [Viewer breadcrumbs](#)
6. [Right drawer Viewer options](#)

Each of these options and menus is described in more detail in the sections below.

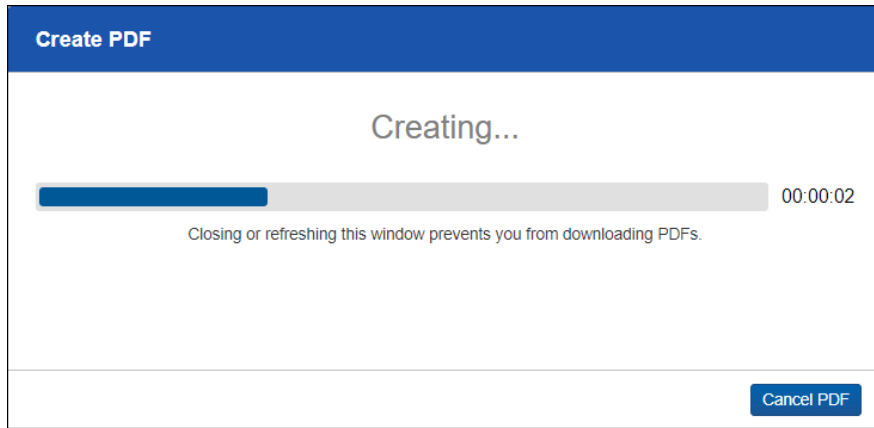
8.1.1.1 Native Viewer toolbar options

The following toolbar options are available in the Native Viewer:



- **Zoom Out/In** —zooms out and in on the current document in increments of 10% within a range of 10% to 4,000%. 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 4,000%, the Viewer automatically sets the display to 4,000%. Your zoom setting persists as you navigate through a document set. This means that if you have 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 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.
- **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%.
- **Layout Mode** —select one of the following options to determine how documents that are more than one page long display in the Viewer.
 - **Single** —one page of a document will display at a time. Use the page navigation options at the bottom of the Viewer to adjust which page you view.
 - **Single Continuous** —displays the pages in the document stacked vertically so you can scroll up and down to view them.
 - **Facing Continuous** —displays the pages in the document in a row horizontally so you can scroll left and right to view them.
- **Draft Mode** —click to begin Draft Mode which automatically contrasts text from the background, help you identify poorly drawn redactions, and identify corrupt OCR text. This option is only available on the Native Viewer and PDF Viewer with rendered documents.
- **Go To Next/Previous Highlight** —moves through previous and next highlighted terms in the document.
- **Rotate All Pages** —rotates all pages in a document clockwise 90 degrees. This option is only available for documents that have been paginated.
- **Redact Markup Visibility** —this option determines how markups display in the Viewer. It only displays if you have the Redact application installed and open a PDF or spreadsheet document in the Native Viewer. Click the Redact Markup Visibility icon to toggle between the following modes:
 - **Solid** - Markups in the document are fully visible and cover text underneath.
 - **Transparent** - Markups in the document are partially visible so that you can still see the text underneath.

- **Hidden** - Markups in the document are not visible.
- **Clear Markups** —click to remove all markups from the currently selected markup set for this document. This icon only displays in PDF and Excel documents that have been prepared for Redact.
- **Create PDF**—click to save the current native document as a PDF file. When you click this option, the Create PDF pop-up displays. 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.



- **Transcript Text**—This option only displays if you have an audio-visual document open in the Native Viewer. Click to expand the panel and view the transcribed text for an audio-visual document.

8.1.1.2 Searchable PDF Improvements per Configuration

When you Create PDF from the Native Viewer or using the Mass 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 Create 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 Create 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 **Create PDF**, a copy of the document converts to a PDF file you can save from your web browser downloads. Relativity assigns a GUID for Create PDF file names.

- **Search Bar** —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.
 - Searching supports dtSearch and so proximity, fuzziness, and stemming can be used.
 - You can remove a term you previously searched for or all of the terms you have recently searched for from the Persistent Highlight Pane. Removing a term or terms will also remove any highlights they

generated in the document. To remove a term or terms, hover your cursor over the row of the term or recent searches you wish to remove and then click on the **clear term 'x'** icon in the right side of the row.

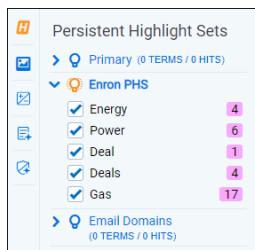
- **Show/Hide Hidden Cells**—displays or hides all hidden cells in a Microsoft Excel spreadsheet. This functionality is only available for Excel files and does not work on imaged documents because Relativity only images unhidden cells.

8.1.1.3 Left drawer Viewer options

The following options are available in the left drawer of the review interface:



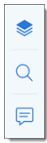
- **Persistent Highlighting**—displays or hides a panel containing all recent searches from the criteria entered in the search bar and any persistent highlight sets in the workspace. You can also create a dtSearch or keyword search in the Your recent searches section. Only terms in the sets and recent searches that are in the current document will display in the pane.
Additionally, you can control which highlights display in the current document by clicking on either the persistent set to only display highlights from that set or you can click on a specific term to only see that term highlighted in the document. You can also navigate to and from highlights using this pane.



- **Thumbnail**—click to expand the left drawer and display the Thumbnail Viewer. Each page of the document you are reviewing has its own numbered thumbnail in the Thumbnail Viewer.
- **Sentiment**—click to expand or collapse the left drawer and display sentiment analysis highlights in the Viewer.
- **aiR for Review Analysis**—click to expand or collapse the left drawer and display aiR for Review results. You can also enable or disable aiR for Review highlights.
- **aiR for Privilege Analysis**—click to expand or collapse the left drawer and display aiR for Privilege results.

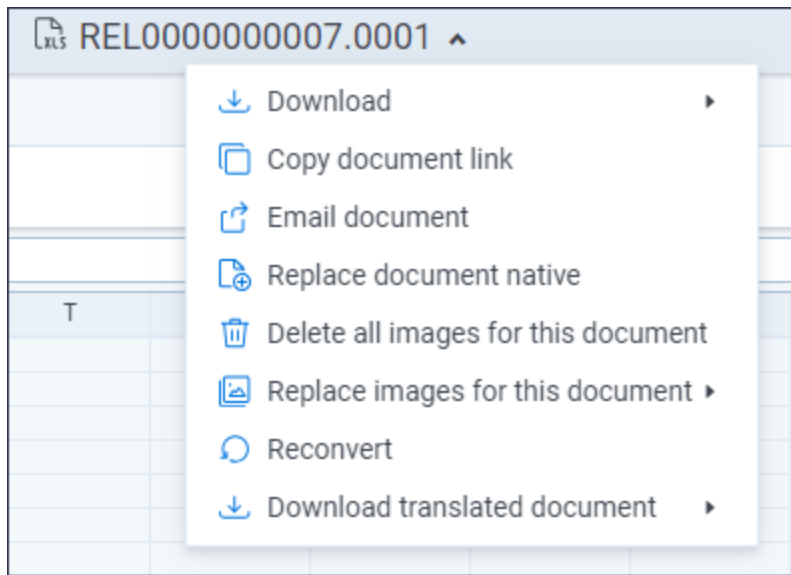
8.1.1.4 Right drawer Viewer options

The following options are available in the right drawer:



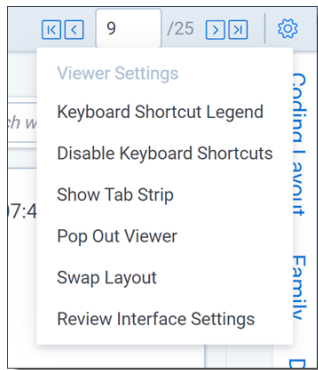
- **Hidden Content**—displays or hides all hidden cells in a Microsoft Excel spreadsheet. This functionality is only available for Excel files and does not work on imaged documents because Relativity only images unhidden cells.
- **Contextual Search**—click to expand the right drawer and display the Contextual Search card. This feature allows you to quickly navigate to matching search terms in a document which is useful in longer documents or ones that have many matching search terms. The Contextual Search card has the same functionality as the Search Bar. To learn more about the Search Bar's functionality, see [Search Bar](#). Additionally, each search term match is displayed in a box that includes both words before and after the search term match to make it easy for you to view the context of each one.
Enter a term or terms in the search box and press **Enter** on your keyboard to highlight in yellow any matches in the current document. You can click on a desired search term box in the pane to jump to that place in the document. The active search term box will display with a blue border and the matching search term in the document will be highlighted in blue to make it easy to find.
- **Comments**—click to expand the right drawer and display the Comments panel. From this panel, reviewers can add, edit, or delete comments on any text-based or audio-visual documents in the Native Viewer.

8.1.1.5 Document actions menu



To learn more about these options, see [Document actions menu](#).

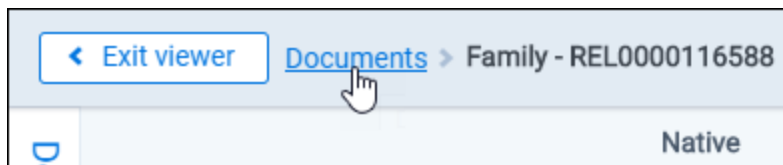
8.1.1.6 Viewer settings menu



To learn more about these options, see [Viewer settings menu](#).

8.1.1.7 Viewer breadcrumbs

The Viewer breadcrumbs help you track your current location while browsing documents in the Related items card. The information on your current location updates as you navigate. If Documents is an active link, you can click it to return to the document you were viewing before browsing documents in the Related items card.



Additionally, to exit the Viewer and return to the page you were previously on, you can click the **Exit viewer** button at any time.

8.1.2 Copying text in the Viewer

While viewing a document in the Native Viewer, you have several right-click options, including the **Copy** option. Use this option to copy text from the document you are 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.

You cannot copy text if you:

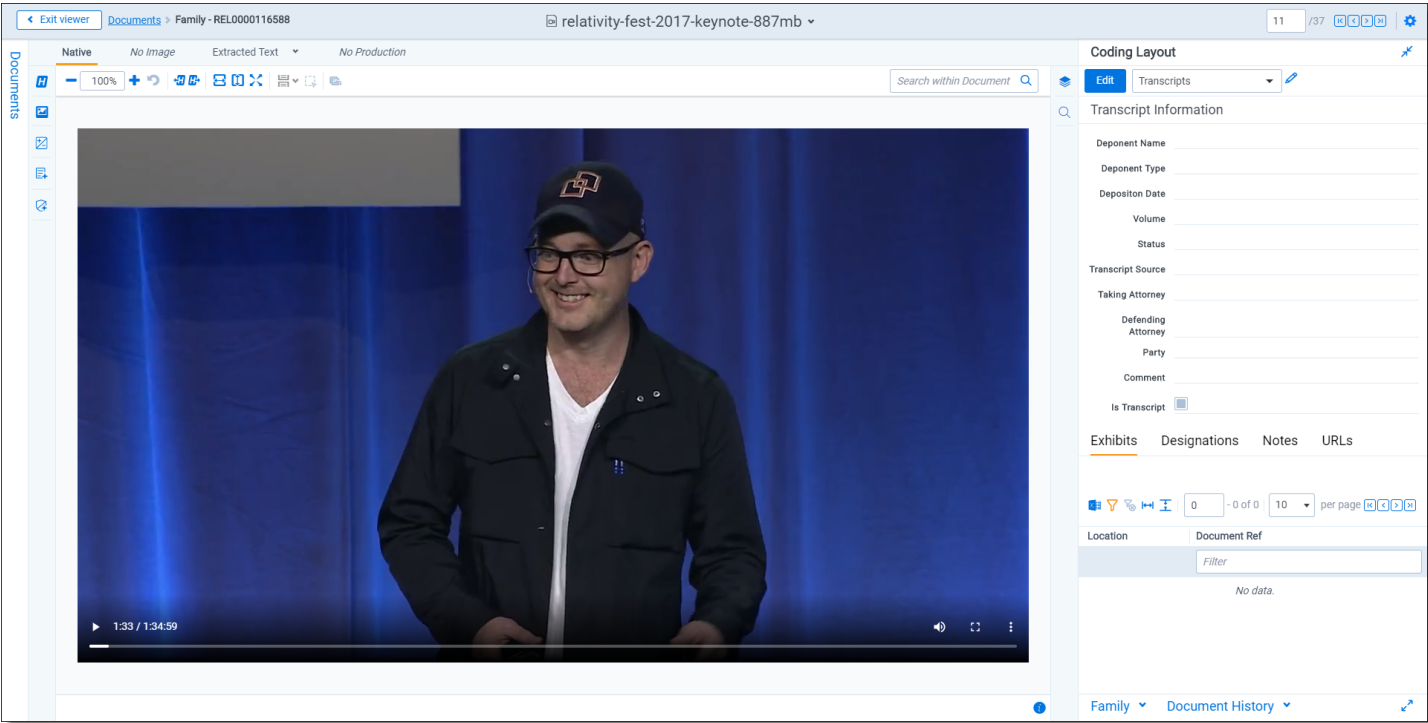
- Have not highlighted any text.
- Do not have permission to the Local Access option on the Document object. This is the same permission that permits you to open the file in its native application. For more information, see Object list in Relativity Admin guide.

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 the Native Viewer or the Extracted Text Viewer.


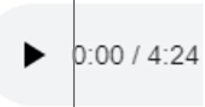




8.1.3 Streaming audio and video files

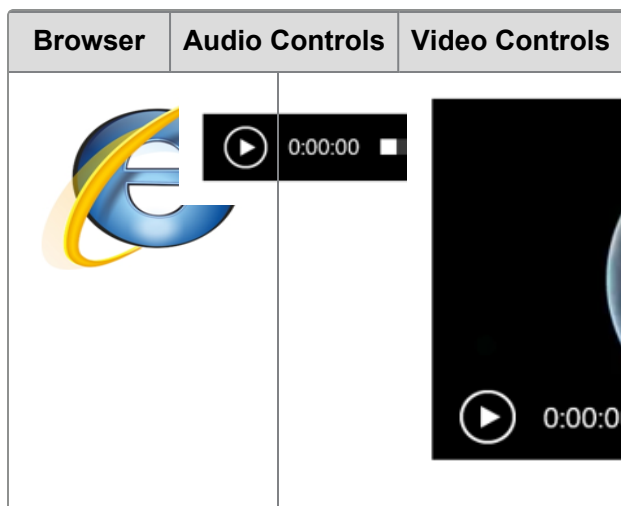
Audio and video files can be streamed in the Native Viewer. Audio and video file type compatibility varies depending on your internet browser.

Note: If an audio or video file has not been opened in the Native 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**.



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

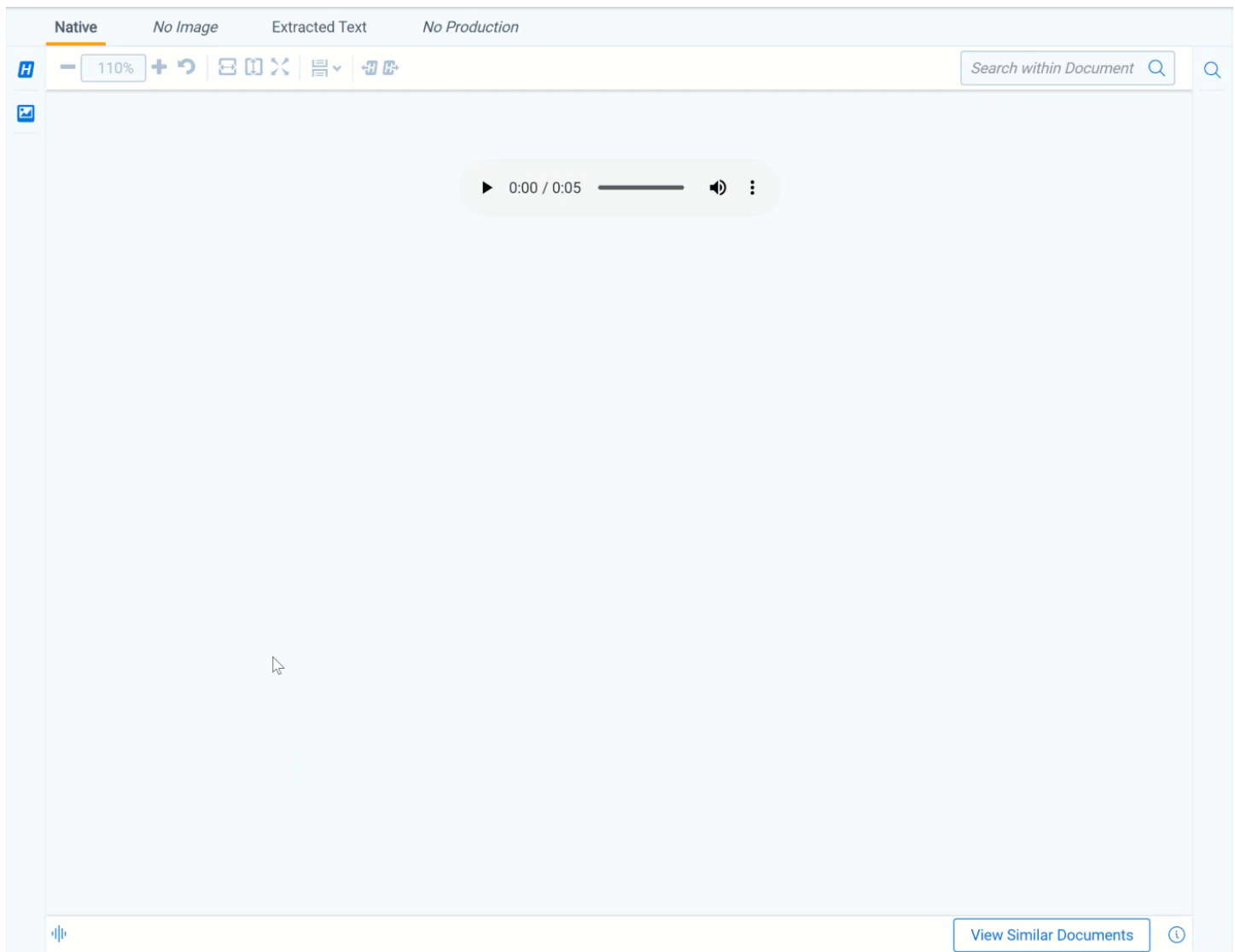
| Browser | Audio Controls | Video Controls |
|---|---|---|
|  |  |  |
|  |  |  |



8.1.3.1 Waveform audio

Note: Audio files that are longer than 30 minutes cannot be opened in the Native Viewer.

Waveform is a visualization of sound that you can view while listening to an audio file in the Native Viewer. Click the **Show/Hide Waveform** icon to display the Waveform visualization. The visualization tracks the volume and intensity of sound to help you avoid audio inactivity. You can use the audio controls to skip these sections. The visualization also scrolls with a time scale along the bottom to help you identify when a particular audio event occurs.



8.1.4 Document Intelligence

Document Intelligence notifies you that there is hidden or annotated content, including a pivot table or a filtered pivot table, present in the current document in the Native Viewer. This hidden content are the annotations and modifications tracked in certain document formats. For more information on the file types, see [Tracking annotations](#). 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 Viewer.

8.1.4.1 Tracking annotations

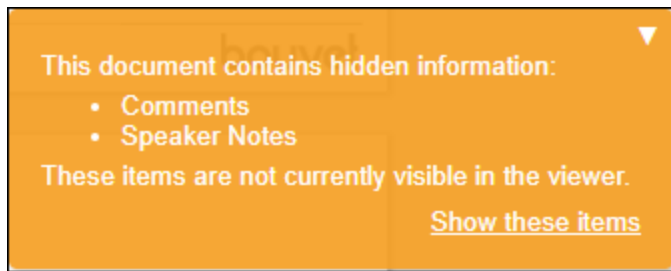
The various file types each have distinct annotations that are tracked. Below is each file type that is supported and the related tracked changes:

| 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 |

| File type | File extensions | Annotation type | Tracked changes |
|------------|-----------------|---|-------------------------------|
| | | | 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, text content outside the printable page | |

8.1.4.2 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 Native Viewer. Click the **Hidden Content** icon 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](#).

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

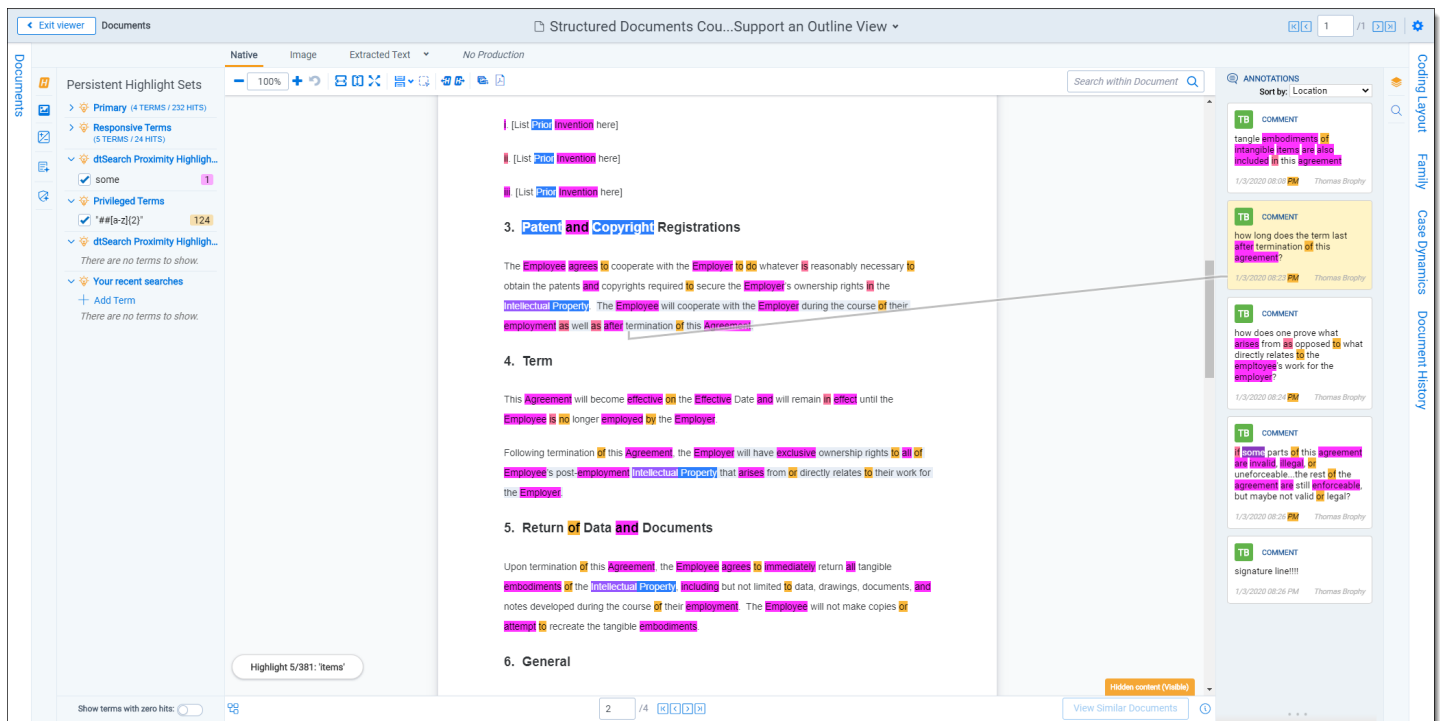
Each type of annotation comes with its distinct highlight in the Native Viewer. Below is a table that lists each annotation type with its highlight in the Viewer:

| File type | Modification | Annotation |
|-----------|---------------|----------------------------------|
| Excel | Inserted cell | Green dotted border around cell. |
| Excel | Deleted cell | Red dotted border around cell. |

| File type | Modification | Annotation |
|------------|-----------------|---|
| 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. |
| 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. Each of these pages count toward the document's total number of pages. If you try to navigate to a speaker note, the Viewer will take you to the page above the speaker note, so you can see what the note applies to. |
| 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, unless you moved a cell. In this case, there is a leader line where the cell was originally located and a leader line in the cell's new location. 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.

8.2 Image Viewer

When you switch to the Image Viewer, a .tiff or .jpeg version of the document displays. You can highlight and redact images in this mode. The Image Viewer is only available if you have loaded an imaged version of the document in the Viewer or if you have manually imaged the file using the Image on the fly option in the Document actions menu. For more information, see [Imaging on the fly](#).

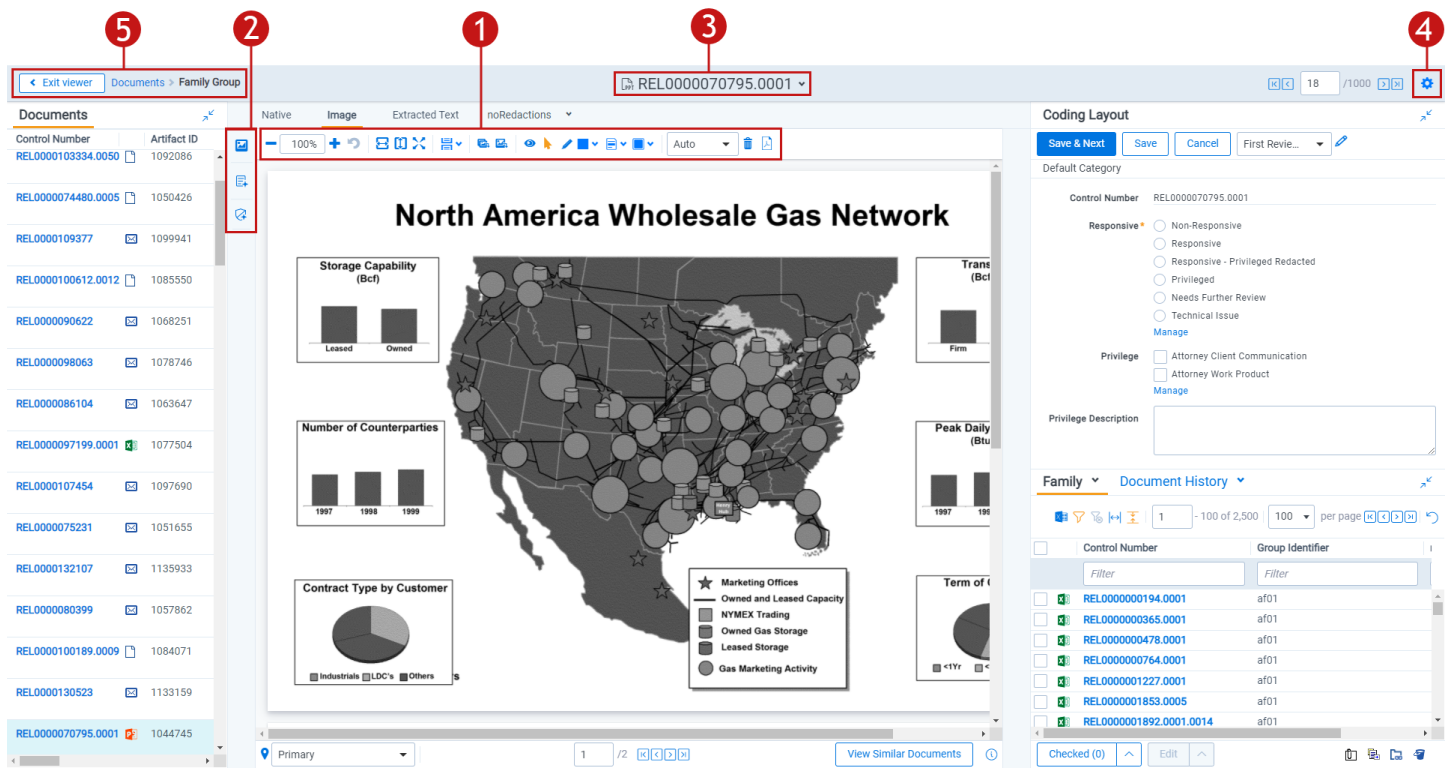
The redactions that are burned into a produced image are the redactions that were on the image at the time that you produced it. If you add or remove redactions from an image after you have produced it, then the image and the produced version of that image will be out of sync.

8.2.1 Navigating the Image Viewer

The Image Viewer offers several ways of viewing and working with documents.

Note: If you used the Basic Imaging profile to produce images of a PDF file, please note that the Viewer displays PDF text by mapping the character codes to Unicode in most cases. To check whether PDF text has been properly encoded and will display correctly in the Viewer, copy the text in the original PDF file and paste it into another application like Microsoft Word or Notepad. If the pasted text does not display correctly, the PDF is not properly encoded. If the pasted text displays correctly in another application but not in the Viewer, contact [Support](#) for assistance.

There are options available in the following sections of the Viewer:



1. [Image Viewer toolbar options](#)
2. [Left drawer Viewer options](#)
3. [Document actions menu](#)
4. [Viewer settings menu](#)
5. [Viewer breadcrumbs](#)

Each of these options and menus is described in more detail in the sections below.

8.2.1.1 Image Viewer toolbar options

The Image Viewer displays the following icons in the toolbar:



- **Zoom Out/In** —zooms out and in on the current document in increments of 10% within a range of 10% to 4,000%. 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 4,000%, the Viewer automatically sets the display to 4,000%. Your zoom setting persists as you navigate through a document set. This means that if you have 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 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.

- **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%.
- **Layout Mode** —select one of the following options to determine how documents that are more than one page long display in the Viewer.
 - **Single** —one page of a document will display at a time. Use the page navigation options at the bottom of the Viewer to adjust which page you view.
 - **Single Continuous** —displays the pages in the document stacked vertically so you can scroll up and down to view them.
 - **Facing Continuous** —displays the pages in the document in a row horizontally so you can scroll left and right to view them.
- **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.

- **Selector** —select within a document.
- **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.
- **Highlight - <Color>** —highlights the selected text with the color you specify from the drop-down menu. The default color is blue. Select from the following:
 - Blue
 - Green
 - Orange
 - Pink
 - Purple
 - Yellow
- **Redaction Mode - Basic Redact** —enables the basic redaction tool. For more information, see [Creating inverse redactions on page 28](#).
- **Redaction Mode - 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 28](#).
- **Redaction Mode - Inverse** —enables the inverse redaction tool. For more information, see [Creating inverse redactions on page 28](#).
- **Redaction Mode - 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 29](#).
- **Redaction Type - <Style>** —enables single redaction tool. For more information on redacting, see [Creating basic redactions on page 27](#). 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.
- **Font Size** —change the font size of the text within a text box redaction.
- **Delete Highlights** —mass delete markups from any or all images in the document. For more information, see [Mass deleting markups on page 32](#).
- **Create PDF** —gives you the option of saving the image as a PDF. For more information, see [Saving an image as a PDF](#).

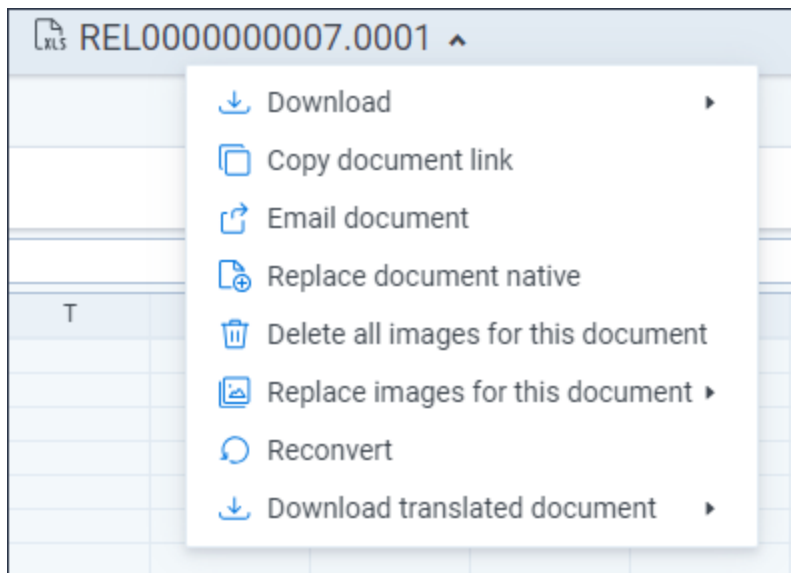
8.2.1.2 Left drawer Image Viewer options

The following options are available in the left drawer:



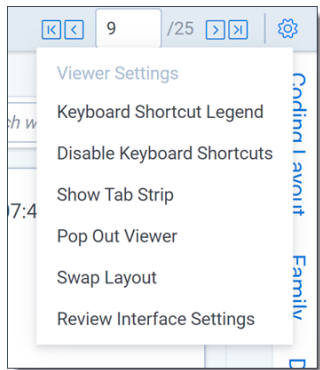
- **Thumbnail**—click to expand the left drawer and display the Thumbnail Viewer. Each page of the document you are reviewing has its own numbered thumbnail in the Thumbnail Viewer. To learn more, visit [Thumbnail Viewer](#).
- **aiR for Review Analysis**—click to expand or collapse the left drawer and display aiR for Review results. You can also enable or disable aiR for Review highlights.
- **aiR for Privilege Analysis**—click to expand or collapse the left drawer and display aiR for Privilege results.

8.2.1.3 Document actions menu



To learn more about these options, see [Document actions menu](#).

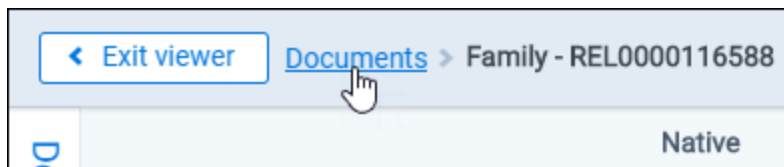
8.2.1.4 Viewer settings menu



To learn more about these options, see [Viewer settings menu](#).

8.2.1.5 Viewer breadcrumbs

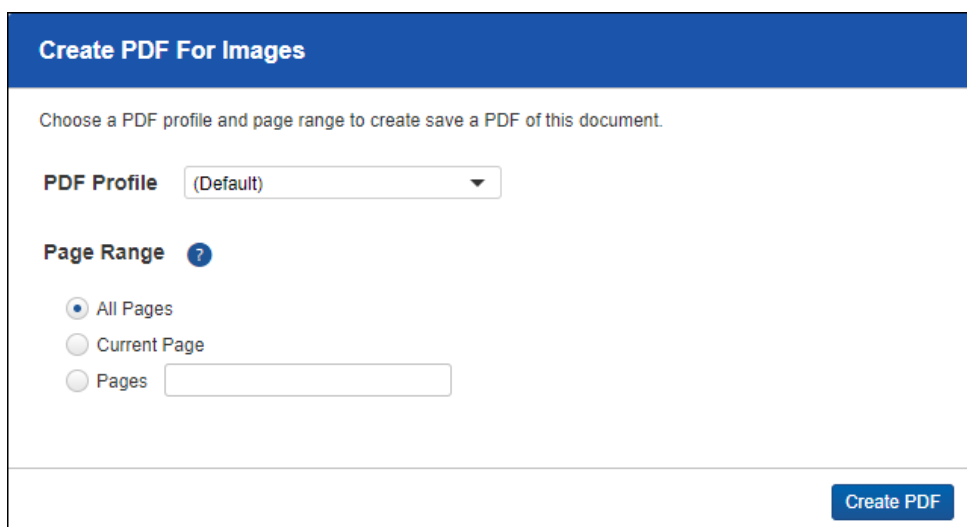
The Viewer breadcrumbs help you track your current location while browsing documents in the Related items card. The information on your current location updates as you navigate. If Documents is an active link, you can click it to return to the document you were viewing before browsing documents in the Related items card.



Additionally, to exit the Viewer and return to the page you were previously on, you can click the **Exit viewer** button at any time.

8.2.2 Saving an image as a PDF

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



- **PDF Profile**—select the desired PDF profile to determine how the PDF will be customized.
- **Page Range**—select from the following standard print range options:
 - **All pages**—saves all pages in the document.
 - **Current Page**—saves only the page you are currently on.
 - **Pages**—saves a range of pages that you specify in the text box to the right.

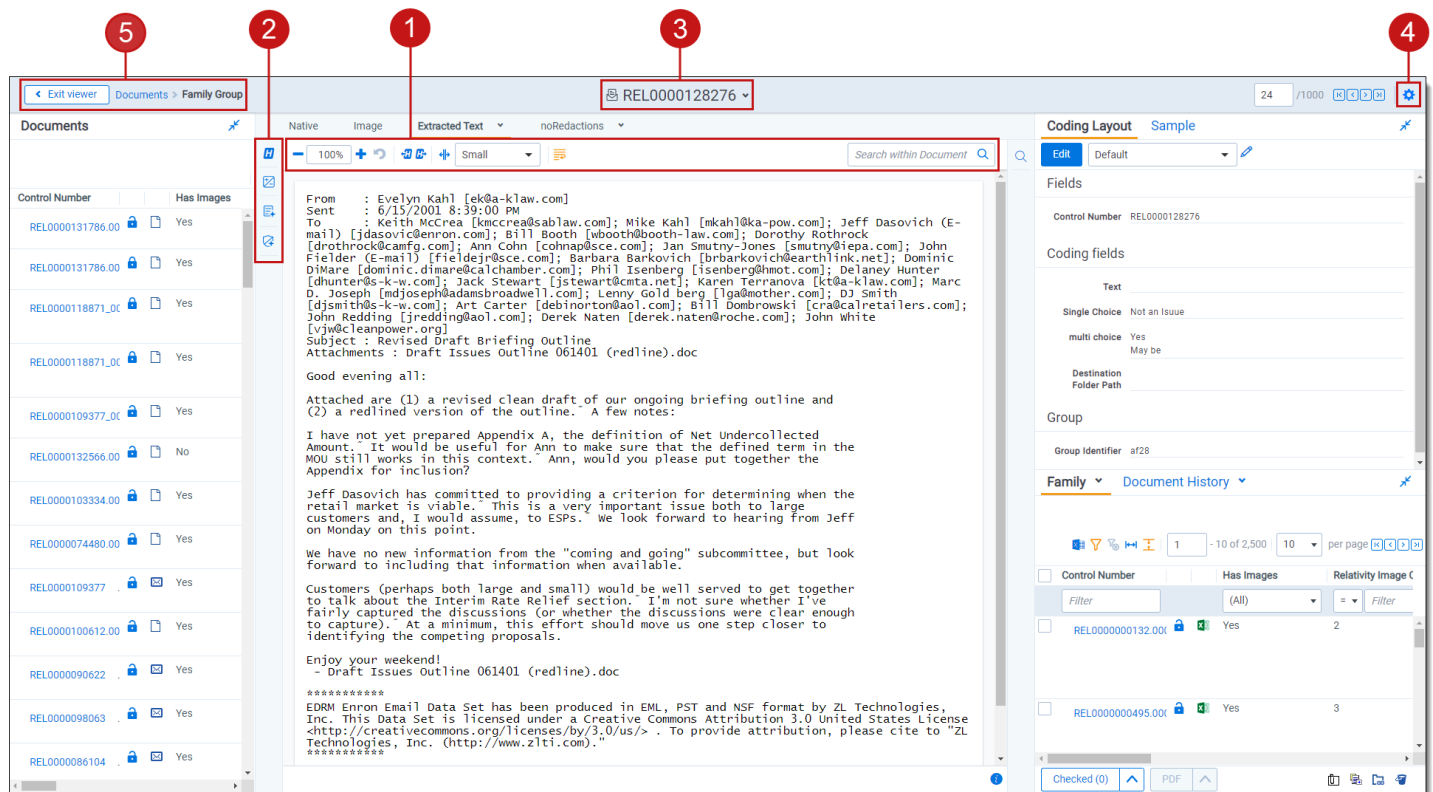
8.3 Extracted Text Viewer

When you switch to Extracted Text Viewer in the Viewer type tabs, you can access a drop-down menu on the right side of the Extracted Text tab where all extracted text and all long text fields on the field edit/creation page are available. 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.

Notes: 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 list, and the current document does not have text for that field, the Viewer displays a message stating, "This page is empty". The Viewer displays PDF text by mapping the character codes to Unicode in most cases. To check whether PDF text has been properly encoded and will display correctly in the Viewer, copy the text in the original PDF file and paste it into another application like Microsoft Word or Notepad. If the pasted text does not display correctly, the PDF is not properly encoded. If the pasted text displays correctly in another application but not in the Viewer, contact [Support](#) for assistance.

8.3.0.1 Navigating the Extracted Text Viewer

The Extracted Viewer offers several ways of viewing and working with documents. There are options available in the following sections of the Viewer:



1. [Extracted Text Viewer toolbar options](#)
2. [Left drawer Viewer options](#)
3. [Document actions menu](#)
4. [Viewer settings menu](#)
5. [Viewer breadcrumbs](#)

Each of these options and menus is described in more detail in the sections below.

8.3.0.2 Extracted Text Viewer toolbar options

The Extracted Text Viewer provides the following options:



- **Zoom Out/In** —zooms out and in on the current document in increments of 10% within a range of 10% to 4,000%. 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 4,000%, the Viewer automatically sets the display to 4,000%. Your zoom setting persists as you navigate through a document set. This means that if you have 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%.
- **Go To Next/Previous Highlight** —moves through previous and next highlighted terms in the document.
- **Tab character size** —select an option from the drop-down menu to determine the amount of space that is taken when the Tab key was used in the current document. This option can help you ensure that the spacing in a spreadsheet document is aligned and works best when the Tab key is used after each column in the spreadsheet.
- **Toggle WordWrap** —determines whether the text in the current document will wrap so that it fits on the current page or not.
 - **Enabled** —text in the current document will be forced onto the next line if it cannot display in the current window size. You cannot scroll horizontally with Toggle WordWrap enabled.
 - **Disabled**—text in the current document will not be forced onto the next line will display in more horizontal fashion. You can scroll horizontally to control to view the desired text
- **Search Bar**—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.
 - Searching supports dtSearch and so proximity, fuzziness, and stemming can be used.

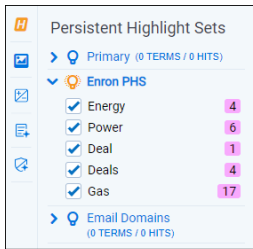
Note: If you don't have permission to the Local Access option on the Document object, you can't use the Ctrl+C or Ctrl+Ins options in either the Native Viewer or the Extracted Text Viewer.

8.3.0.3 Left drawer Viewer options

The following options are available in the left drawer:



- **Persistent Highlighting**—displays or hides a panel containing all recent searches from the criteria entered in the search bar and any persistent highlight sets in the workspace. You can also create a dtSearch or keyword search in the Your recent searches section. Only terms in the sets and recent searches that are in the current document will display in the pane.
Additionally, you can control which highlights display in the current document by clicking on either the persistent set to only display highlights from that set or you can click on a specific term to only see that term highlighted in the document. You can also navigate to and from highlights using this pane.



- **Sentiment**—click to expand or collapse the left drawer and display sentiment analysis highlights in the Viewer.
- **aiR for Review Analysis**—click to expand or collapse the left drawer and display aiR for Review results. You can also enable or disable aiR for Review highlights.
- **aiR for Privilege Analysis**—click to expand or collapse the left drawer and display aiR for Privilege results.

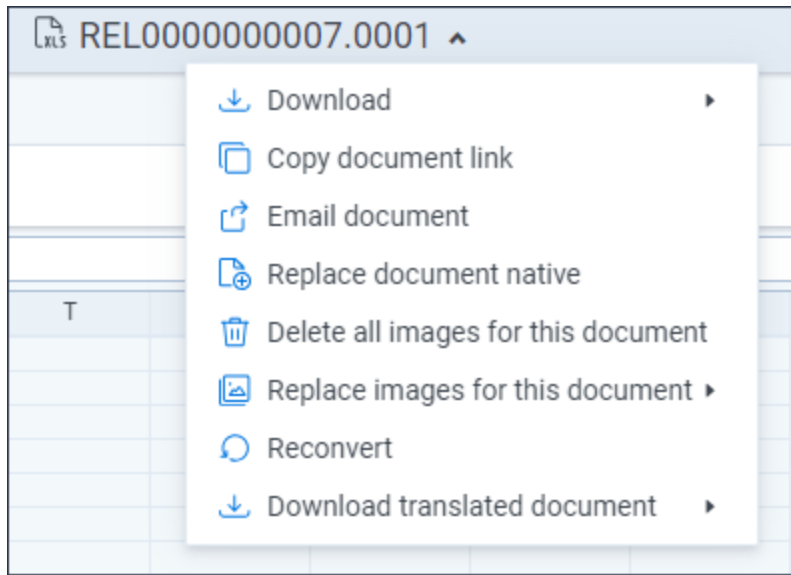
8.3.0.4 Right drawer Viewer options

The following option is available in the right drawer:



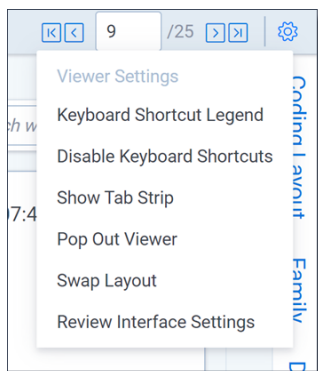
- **Contextual Search**—click to expand the right drawer and display the Contextual Search card. This feature allows you to quickly navigate to matching search terms in a document which is useful in longer documents or ones that have many matching search terms. The Contextual Search card has the same functionality as the Search Bar. To learn more about the Search Bar's functionality, see [Search Bar](#). Additionally, each search term match is displayed in a box that includes both words before and after the search term match to make it easy for you to view the context of each one.
Enter a term or terms in the search box and press **Enter** on your keyboard to highlight in yellow any matches in the current document. You can click on a desired search term box in the pane to jump to that place in the document. The active search term box will display with a blue border and the matching search term in the document will be highlighted in blue to make it easy to find.

8.3.0.5 Document actions menu



To learn more about these options, see [Document actions menu](#).

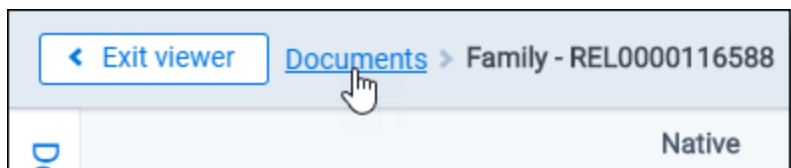
8.3.0.6 Viewer settings menu



To learn more about these options, see [Viewer settings menu](#).

8.3.0.7 Viewer breadcrumbs

The Viewer breadcrumbs help you track your current location while browsing documents in the Related items card. The information on your current location updates as you navigate. If Documents is an active link, you can click it to return to the document you were viewing before browsing documents in the Related items card.



Additionally, to exit the Viewer and return to the page you were previously on, you can click the **Exit viewer** button at any time.

8.4 Productions Viewer

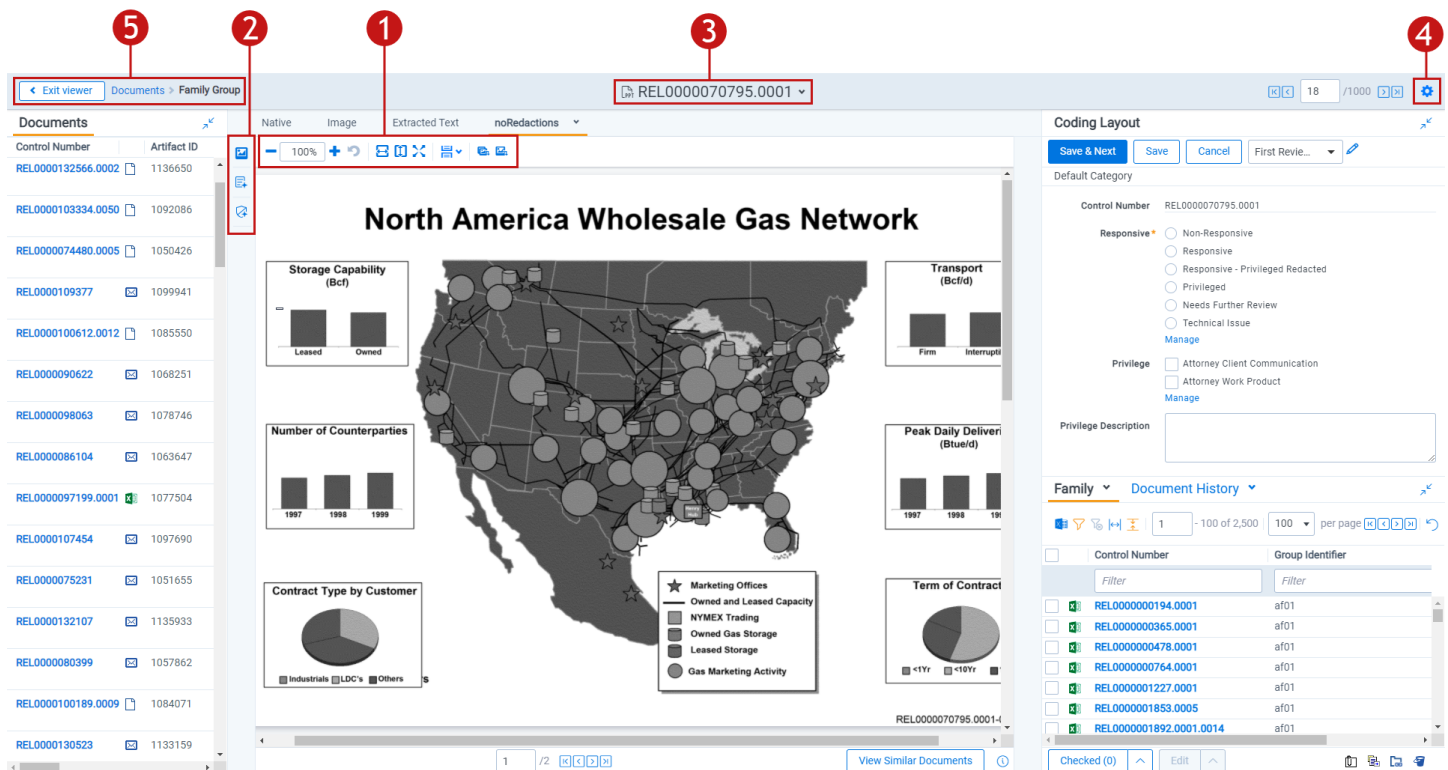
When you switch to the Productions Viewer in the Viewer type tabs, you can access a drop-down menu on the right side of the Productions Viewer tab that displays available production sets that contain the current document. For information about creating production sets, see Production sets in the Admin 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 have 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 is not included in a production, the productions mode option is unavailable.

8.4.1 Navigating the Productions Viewer

The Productions Viewer offers several ways of viewing and working with documents. There are options available in the following sections of the Viewer:



1. [Productions Viewer toolbar options](#)
2. [Left drawer Viewer options](#)
3. [Document actions menu](#)
4. [Viewer settings menu](#)
5. [Viewer breadcrumbs](#)

Each of these options and menus is described in more detail in the sections below.

8.4.1.1 Productions Viewer toolbar options

Productions Viewer provides the following options:



- **Create PDF** —gives you the option of saving the image as a PDF. For more information, see [Saving an image as a PDF](#).
- **Zoom Out/In** —zooms out and in on the current document in increments of 10% within a range of 10% to 4,000%. 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 4,000%, the Viewer automatically sets the display to 4,000%. Your zoom setting persists as you navigate through a document set. This means that if you have 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 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.
- **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%.
- **Layout Mode** —select one of the following options to determine how documents that are more than one page long display in the Viewer.
 - **Single** —one page of a document will display at a time. Use the page navigation options at the bottom of the Viewer to adjust which page you view.
 - **Single Continuous** —displays the pages in the document stacked vertically so you can scroll up and down to view them.
 - **Facing Continuous** —displays the pages in the document in a row horizontally so you can scroll left and right to view them.
- **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.

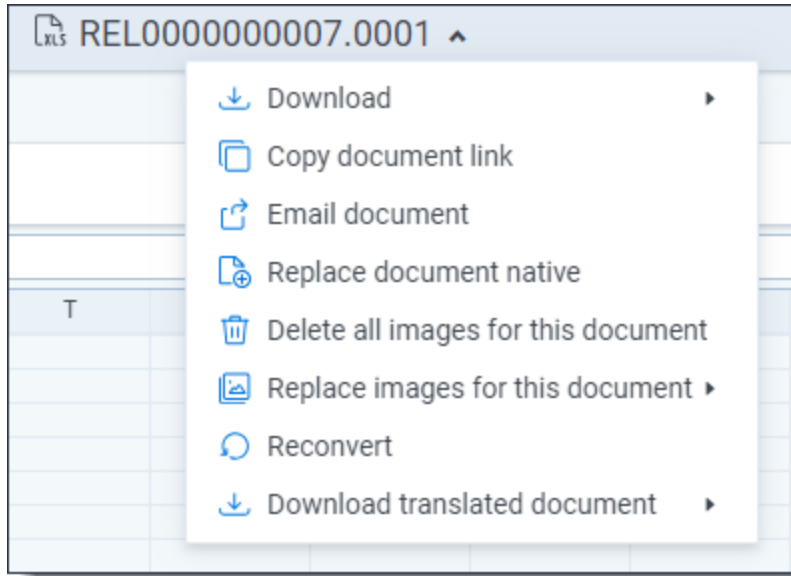
8.4.1.2 Left drawer Productions Viewer options

The following options are available in the left drawer:



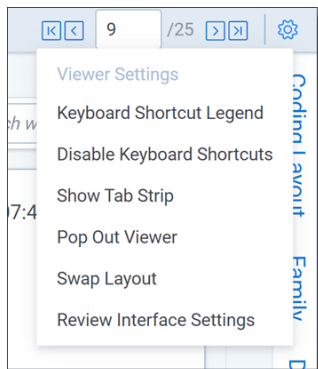
- **Thumbnail**—click to expand the left drawer and display the Thumbnail Viewer. Each page of the document you are reviewing has its own numbered thumbnail in the Thumbnail Viewer. To learn more, visit [Thumbnail Viewer](#).
- **aiR for Review Analysis**—click to expand or collapse the left drawer and display aiR for Review results. You can also enable or disable aiR for Review highlights.
- **aiR for Privilege Analysis**—click to expand or collapse the left drawer and display aiR for Privilege results.

8.4.1.3 Document actions menu



To learn more about these options, see [Document actions menu](#).

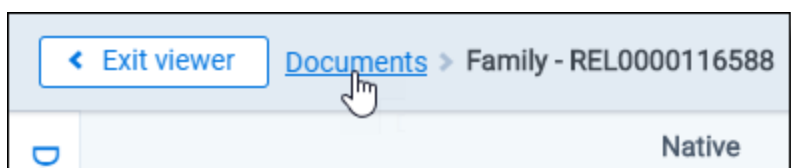
8.4.1.4 Viewer settings menu



To learn more about these options, see [Viewer settings menu](#).

8.4.1.5 Viewer breadcrumbs

The Viewer breadcrumbs help you track your current location while browsing documents in the Related items card. The information on your current location updates as you navigate. If Documents is an active link, you can click it to return to the document you were viewing before browsing documents in the Related items card.



Additionally, to exit the Viewer and return to the page you were previously on, you can click the **Exit viewer** button at any time.

8.4.2 Imaging on the fly

You can image a single document in the Viewer by selecting the Image on the fly option from the Document actions menu at the top-center of the page.

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:

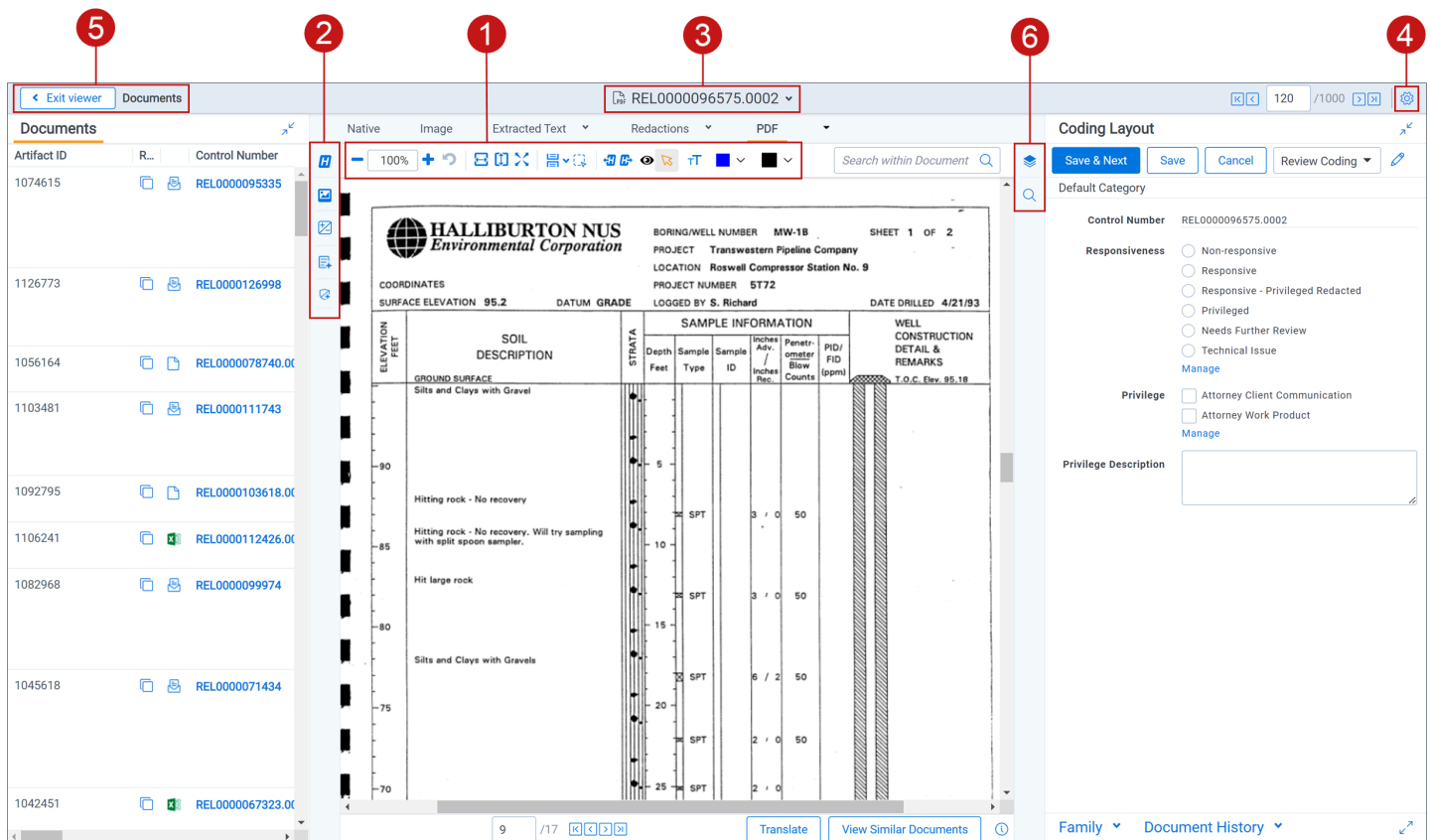
- Many PDFs render and image very well. However, you may have problems rendering and imaging some PDFs due to the variety of their content.
- While most Microsoft Office documents render and image well, you may experience issues when imaging documents with embedded files.
- You may have problems rendering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

8.5 PDF Viewer

The PDF Viewer allows you to view PDF files in the Review Interface.

Note: You may experience slowness if you try to open PDF documents that are larger than 300 megabytes. The Viewer displays PDF text by mapping the character codes to Unicode in most cases. To check whether PDF text has been properly encoded and will display correctly in the Viewer, copy the text in the original PDF file and paste it into another application like Microsoft Word or Notepad. If the pasted text does not display correctly, the PDF is not properly encoded. If the pasted text displays correctly in another application but not in the Viewer, contact [Support](#) for assistance.

There are options available in the following sections of the Viewer:



1. [PDF Viewer toolbar options](#)
2. [Left drawer Viewer options](#)
3. [Document actions menu](#)
4. [Viewer settings menu](#)
5. [Viewer breadcrumbs](#)
6. [Right drawer Viewer options](#)

Each of these options and menus is described in more detail in the sections below.

8.5.0.1 PDF Viewer toolbar options

The PDF Viewer provides the following options:



- **Zoom Out/In** —zooms out and in on the current document in increments of 10% within a range of 10% to 4,000%. 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 4,000%, the Viewer automatically sets the display to 4,000%. Your zoom setting persists as you navigate through a document set. This means that if you have 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 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.
- **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%.
- **Layout Mode** —select one of the following options to determine how documents that are more than one page long display in the Viewer.
 - **Single** —one page of a document will display at a time. Use the page navigation options at the bottom of the Viewer to adjust which page you view.
 - **Single Continuous** —displays the pages in the document stacked vertically so you can scroll up and down to view them.
 - **Facing Continuous** —displays the pages in the document in a row horizontally so you can scroll left and right to view them.
- **Draft Mode** —click to begin Draft Mode which automatically contrasts text from the background, help you identify poorly drawn redactions, and identify corrupt OCR text. This option is only available on the Native Viewer and PDF Viewer with rendered documents.
- **Go To Next/Previous Highlight** —moves through previous and next highlighted terms in the document.
- **Redact Markup Visibility** — this option determines how markups display in the PDF Viewer. Click the Redact Markup Visibility icon to toggle between the following modes:
 - **Solid** —Markups in the document are fully visible and cover text underneath.
 - **Transparent** —Markups in the document are partially visible so that you can still see the text underneath.
 - **Hidden** —Markups in the document are not visible.

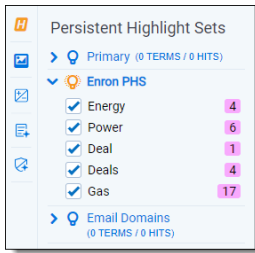
8.5.0.2 Left drawer Viewer options

The following options are available in the left drawer:



- **Persistent Highlighting**—displays or hides a panel containing all recent searches from the criteria entered in the search bar and any persistent highlight sets in the workspace. You can also create a dtSearch or keyword search in the Your recent searches section. Only terms in the sets and recent searches that are in the current document will display in the pane. Additionally, you can control which highlights display in the current document by clicking on either the persistent

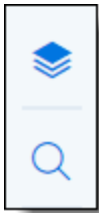
set to only display highlights from that set or you can click on a specific term to only see that term highlighted in the document. You can also navigate to and from highlights using this pane.



- **Thumbnail**—click to expand the left drawer and display the Thumbnail Viewer. Each page of the document you are reviewing has its own numbered thumbnail in the Thumbnail Viewer.
- **Sentiment**—click to expand or collapse the left drawer and display Sentiment Analysis Highlights in the Viewer.
- **aiR for Review Analysis**—click to expand or collapse the left drawer and display aiR for Review results. You can also enable or disable aiR for Review highlights.
- **aiR for Privilege Analysis**—click to expand or collapse the left drawer and display aiR for Privilege results.

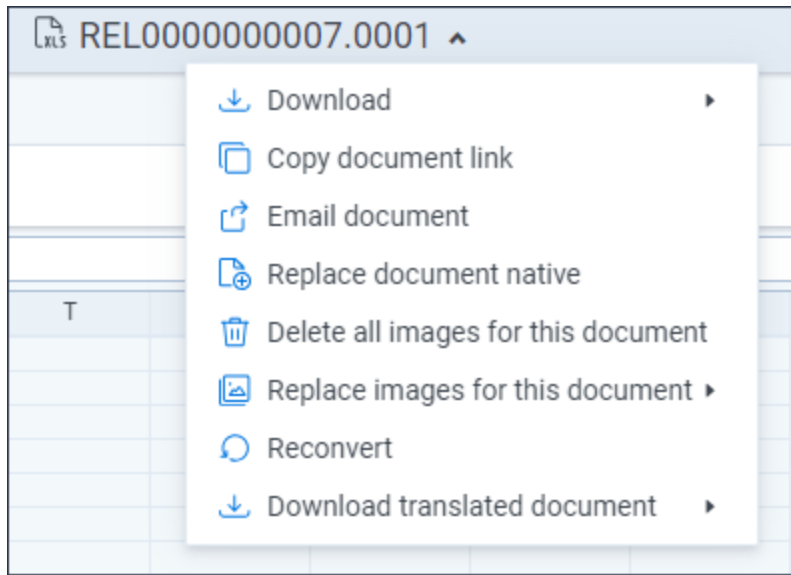
8.5.0.3 Right drawer Viewer options

The following options are available in the right drawer:



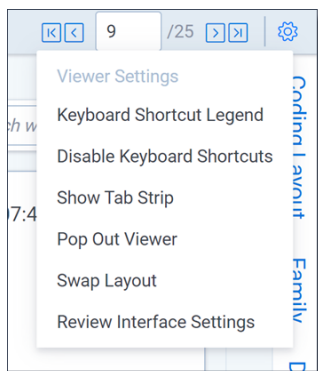
- **Hidden Content**—displays or hides all hidden cells in a Microsoft Excel spreadsheet. This functionality is only available for Excel files and does not work on imaged documents because Relativity only images unhidden cells.
- **Contextual Search**—click to expand the right drawer and display the Contextual Search card. This feature allows you to quickly navigate to matching search terms in a document which is useful in longer documents or ones that have many matching search terms. The Contextual Search card has the same functionality as the Search Bar. To learn more about the Search Bar's functionality, see [Search Bar](#). Additionally, each search term match is displayed in a box that includes both words before and after the search term match to make it easy for you to view the context of each one.
Enter a term or terms in the search box and press **Enter** on your keyboard to highlight in yellow any matches in the current document. You can click on a desired search term box in the pane to jump to that place in the document. The active search term box will display with a blue border and the matching search term in the document will be highlighted in blue to make it easy to find.

8.5.0.4 Document actions menu



To learn more about these options, see [Document actions menu](#).

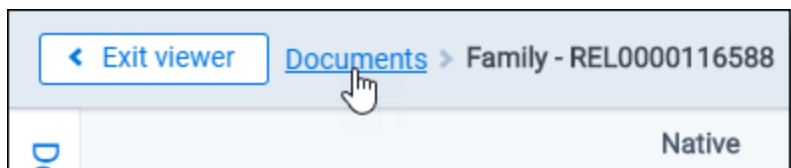
8.5.0.5 Viewer settings menu



To learn more about these options, see [Viewer settings menu](#).

8.5.0.6 Viewer Breadcrumbs

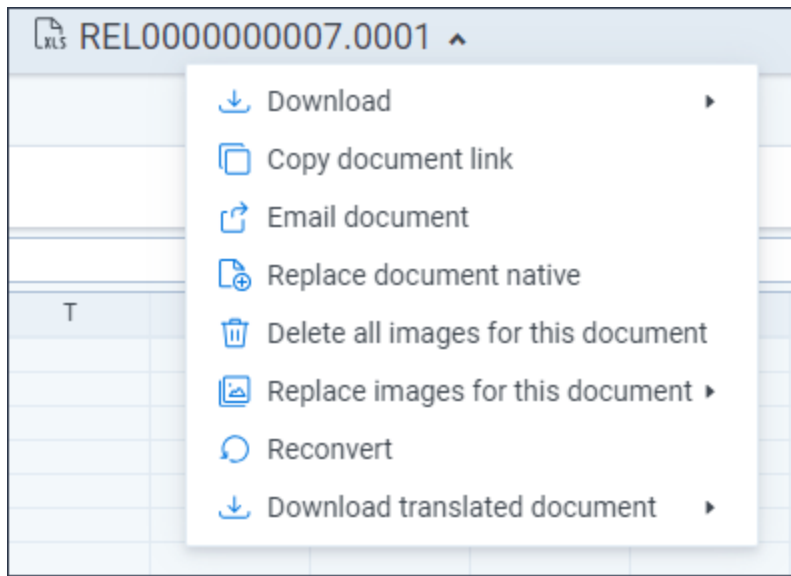
The Viewer Breadcrumbs help you track your current location while browsing documents in the Related items card. The information on your current location updates as you navigate. If Documents is an active link, you can click it to return to the document you were viewing before browsing documents in the Related items card.



Additionally, to exit the Viewer and return to the page you were previously on, you can click the **Exit viewer** button at any time.

8.6 Document actions menu

The following options are available in the Document actions menu:



- **Download**—hover your cursor over this option and select one of the following:

Note: Files over 4 GB cannot be downloaded using this option. If you have a document that is over 4 GB, you can create a saved search that includes any documents you wish to export and then export them using Import/Export.

- **Active Production**—select to download a copy of the produced document. A user must be granted the Documents - Local Access (Download, Copy Text) permission to use this option.
- **Document native**—select to download a copy of the current document. A user must be granted the Documents - Local Access (Download, Copy Text) permission to use this option. If you cannot download a copy of the document, this option is grayed out. Hover your cursor over this option to view a tooltip that contains an explanation why this option is disabled. A system or case administrator can determine which native file types users can and cannot download by doing the following:
 1. Navigate to the **Native Types** tab.
 2. Click the **Edit** icon in the row of the desired file type.
 3. On the **Prevent Native Download** field, select **Yes** to prevent users from downloading it or **No** to allow users to download it.
- **PDF**—select to download a copy of the stored PDF of the current document. To create a stored PDF, use Mass PDF. A user must be granted the Documents - Local Access (Download, Copy Text) permission to use this option. If you cannot download a copy of the document, this option is grayed out. Hover your cursor over this option to view a tooltip that contains an explanation why this option is disabled.

- **Copy document link**—select to copy the URL to the current document to your clipboard.
- **Email document**—select to open an email in your default email application with the URL to the current document included in the body of the email. The subject of the email will include the name of the workspace and the current document.
- **Replace document native**—select to replace the native file of the current document with a new file.
- **Image on the fly/Delete all images for this document**—Image on the fly will display if the current document has not been imaged. If the current document has been imaged, delete all images for this document will display instead.
 - **Delete all images for this document**—select to delete all original images associated with the current document.

Note: If the document has produced images, these are not affected by this option. To remove the produced images from a document, delete the production set instead.

- **Image on the fly**—to image the current document from the Viewer, hover your cursor over this option and the Image Profile options will display. Select the desired profile option to begin the imaging process. A system or case administrator can determine which native file types can or cannot be imaged using Image on the fly by doing the following:
 1. Navigate to the **Native Types** tab.
 2. Click the **Edit** icon in the row of the desired file type.
 3. On the **Restricted From Imaging By Default** field, select **Yes** to prevent users from using this option to image the native type or **No** to allow users to image the native file type.

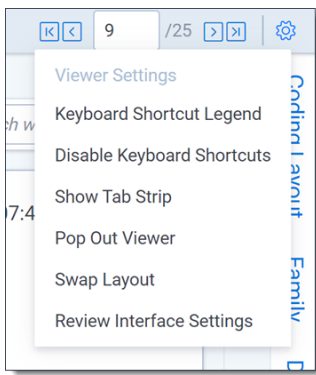
Native Type Information

| | |
|--|--|
| Name | Mac Word 5.x |
| Category (Basic) | Word Processor |
| Category (Native) | |
| Imaging Method | Basic |
| Restricted From Imaging By Default* | <input type="radio"/> Yes <input checked="" type="radio"/> No |
| Prevent Native Download* | <input type="radio"/> Yes <input checked="" type="radio"/> No |

- **Replace images for this document**—to replace the images for the current document using an imaging profile, hover your cursor over this option and select the desired Imaging Profile option to begin the imaging process.
- **Reconvert**—select to clear your internet browser's cache and reload the current document for review.
- **Download translated document**—hover your cursor over this option and select the desired language to download a copy of the document in the selected language. This option only displays if a document has been translated.

8.7 Viewer settings menu

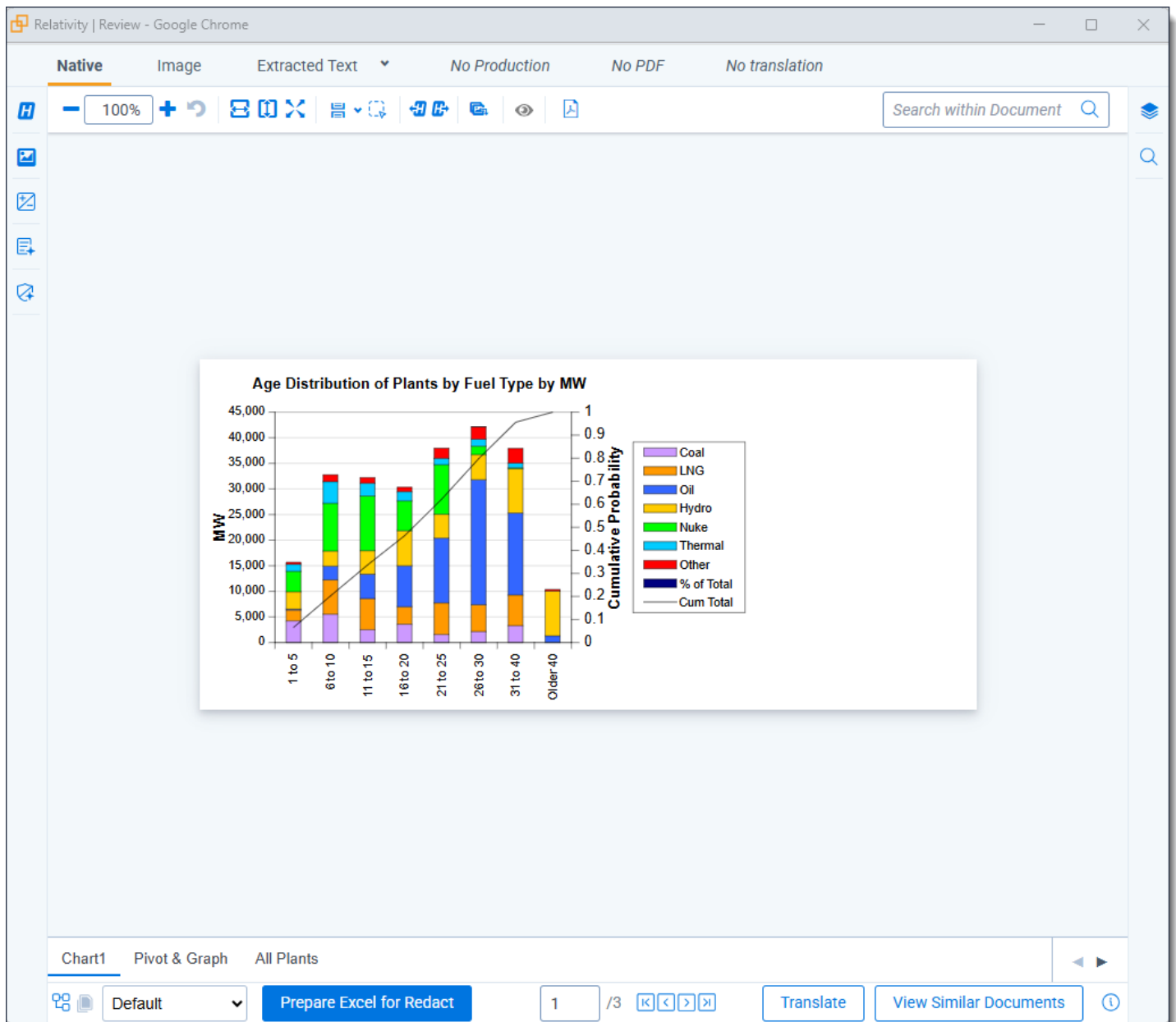
The following options are available in the Viewer settings menu:



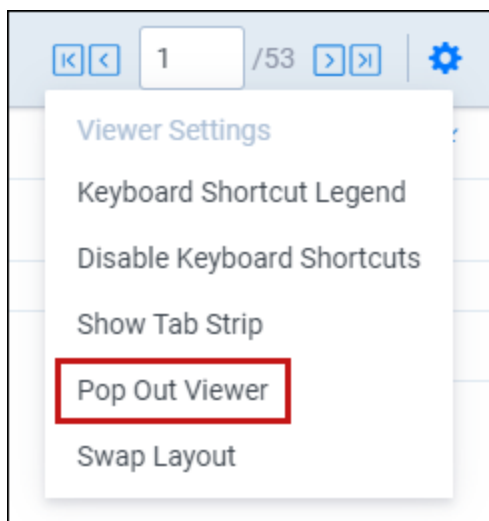
- **Keyboard Shortcut Legend**—select to open the Keyboard Shortcut Legend pop-up modal to view the current keyboard shortcuts available in the Viewer.
- **Enable/Disable Keyboard Shortcuts**—select to enable or disable the keyboard shortcuts feature while in the Viewer.
- **Show/Hide Tab Strip**—select to show or hide the sidebar and tab strip in the Native Viewer.
- **Pop Out Viewer**—select to open the Viewer in a new window in your browser. To learn more, visit [Pop Out Viewer](#).
- **Swap Layout**—select to move the coding layout and the document card to the opposite side of the Viewer from where they are currently located.
- **Review Interface Settings**—Allows a third-party developer to temporarily enable or disable other extensions and settings in the Review Interface while they are developing their extension. This option only displays in the Viewer Settings menu if a user has the Document - Review Interface Settings permission. This permission is disabled by default for all users other than System Administrators.
You can toggle instance settings, persistent highlighting, and extensions on or off for the current user to help troubleshoot problems. Settings that are edited only apply to the current user and do not impact settings across the instance. If you edit any of the options on this page, a message displays at the top of the Viewer indicating that the settings have been changed. You may need to refresh your browser for the changes to be reflected in the Viewer. Any changes made do not persist across user sessions and once you log out, the Viewer will return to the state prior to editing the Review Interface Settings.
If you would like to return to the prior Viewer state, click **Reset Default Settings** at the bottom of the page to restore the settings back to their original values.

8.8 Pop Out Viewer

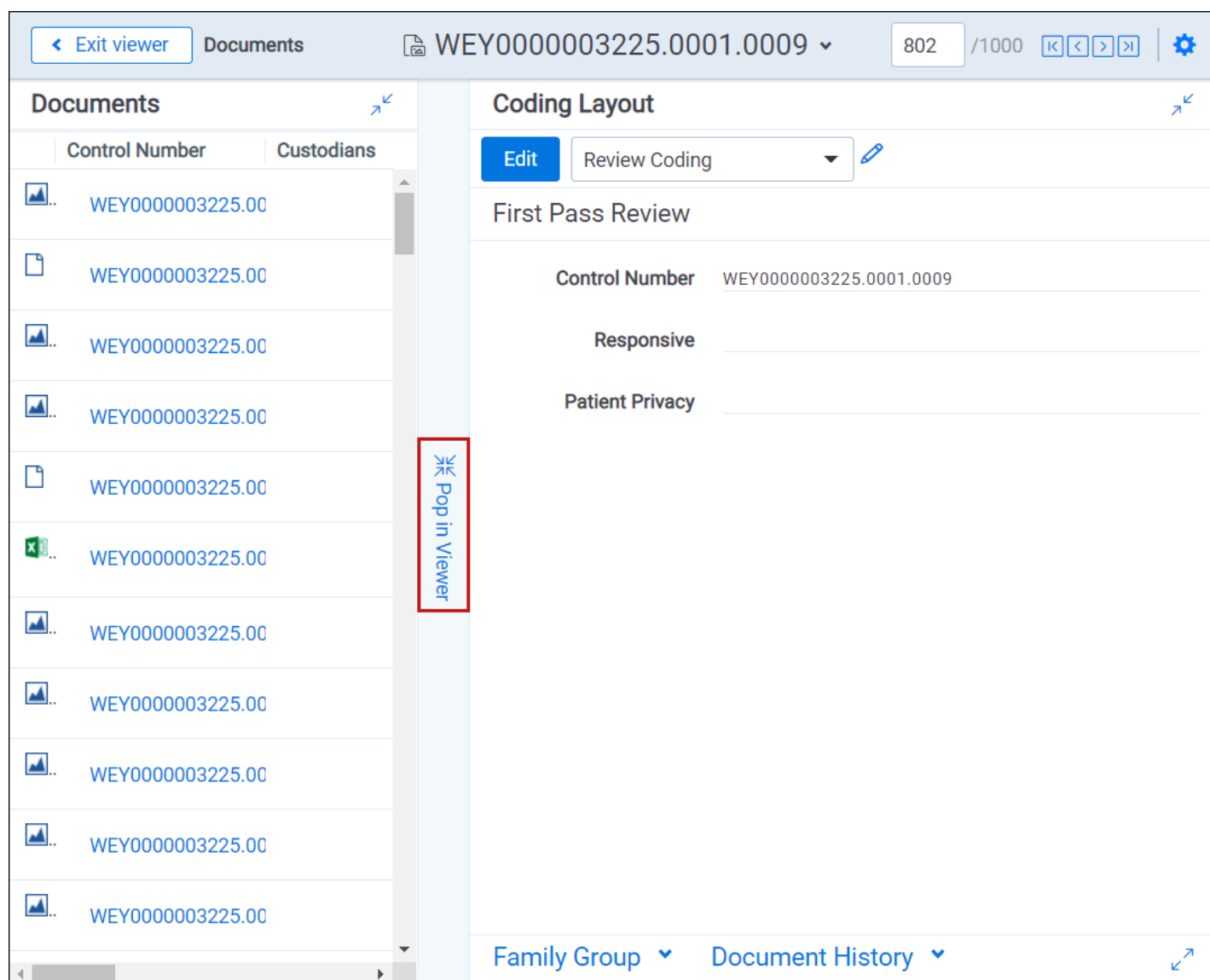
You can open the Viewer in a new window in your browser using the Pop Out Viewer. The Document card and the Coding card remain in the previously opened browser window. They can be expanded to a greater width to take advantage of the space freed up by the Pop Out Viewer. The Pop Out Viewer retains the same functionality as the Viewer. For example, you can switch Viewer types and view highlights or the Thumbnail Viewer as desired.



To open the Pop-Out Viewer in a new browser window, select the **Pop Out Viewer** option from the Viewer settings menu in the upper-right corner.



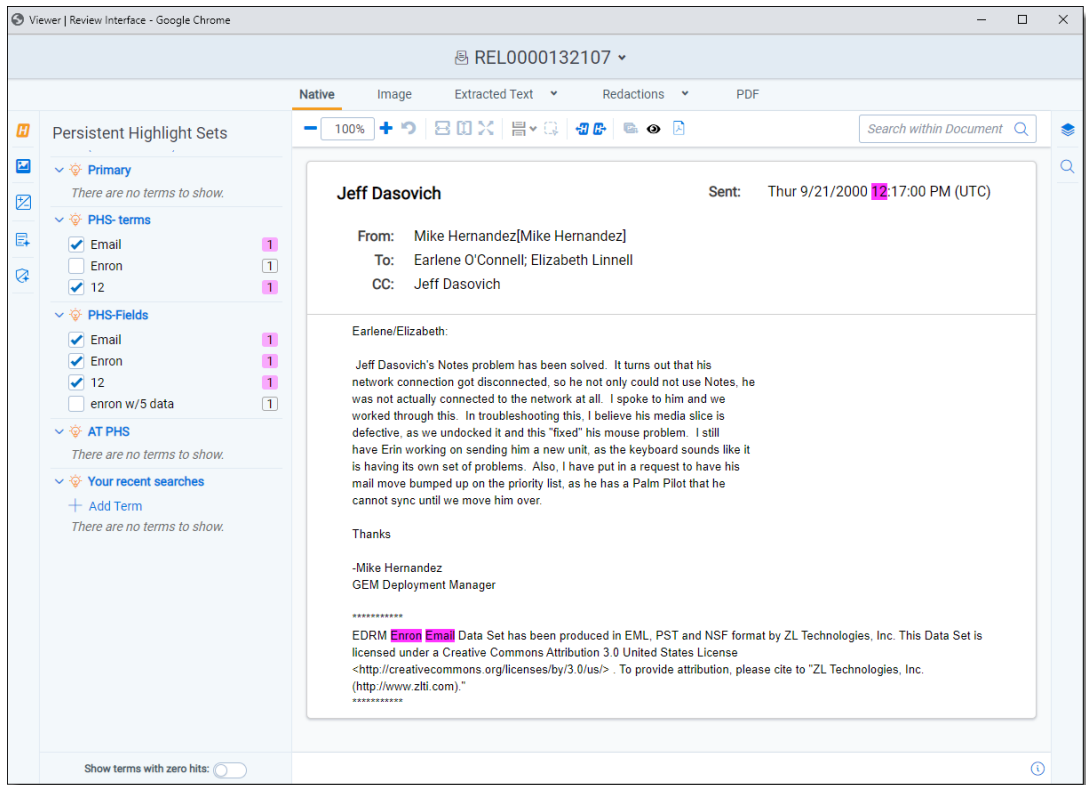
To return the Viewer to the previous browser window where the Document card and Coding card are located, you can click either the Pop In Viewer button on the previous browser window or you can select the Pop In Viewer option from the Viewer settings menu in the upper-right.



Alternatively, if you close the browser window that the popped out Viewer is in, the Viewer pops in to the Review Interface or in other words, returns to the original browser window.

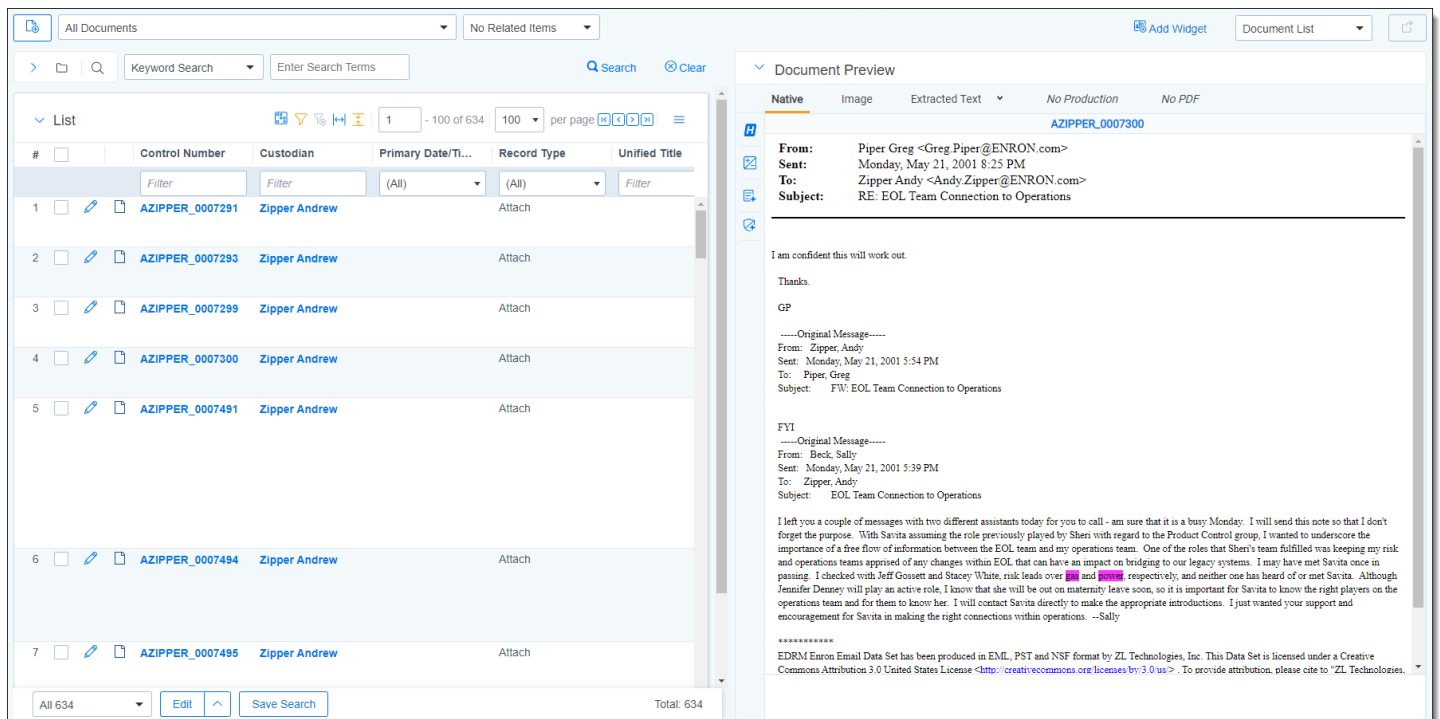
8.8.1 Standalone Viewer

To view a document in a separate browser window, click the file icon in the Document list or in the Viewer on the Documents card or Family card. Launching the Standalone Viewer from either the Documents and Family card launch the Review interface.



8.8.2 Document preview panel

The Document preview panel allows you to view documents in the document list before launching the Viewer. It also allows you to filter the list and quickly view documents in the results which makes the process of finding documents more efficient. To learn more, visit



8.9 Related items card

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

The Edit field will be available in the Related items card if you add it to the Relational card view.

The related items toolbar includes the following:



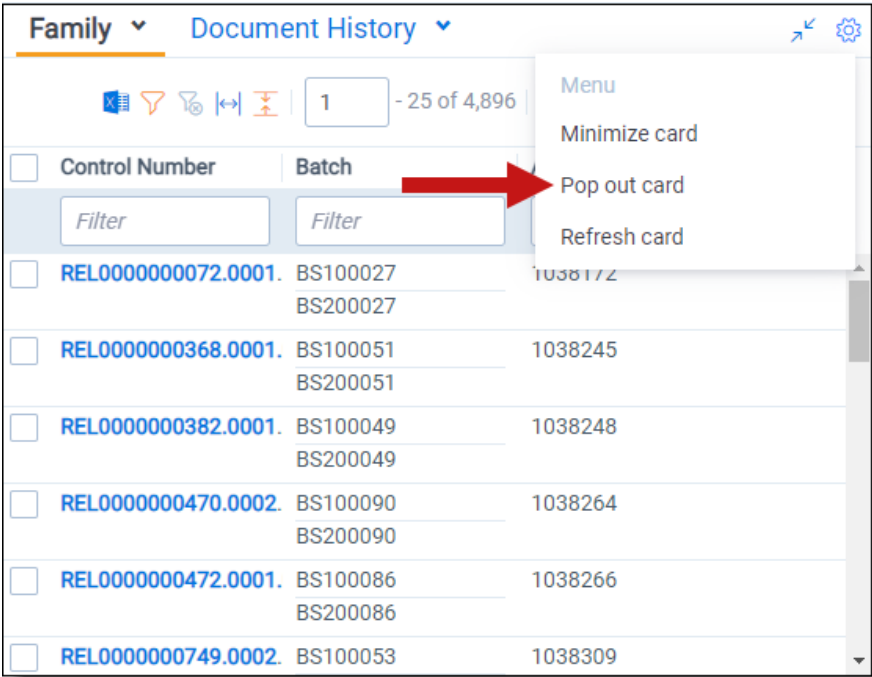
- **Related items** —displays a group of documents related to the active document. Options vary within the workspace. Hover over each icon to display the name of the item. Examples include: family group, duplicates, and thread group.
- **Document history** —displays a history of actions taken on the 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 card, 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 an 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.

When a coding decision is made, the information in the Related Items card automatically refreshes. If there are two or more reviewers on the same document, a user can refresh this card by clicking on the Menu icon and selecting **Refresh card**.

The Related items card can be opened in a separate browser window. Click the Menu icon and select **Pop out card** to open the card in its own window. Click the Menu icon and select **Pop in card** to close the browser window and return the card to the Viewer.



8.9.0.1 Document actions in the related items card

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

For instance, in the example of the Related items card below, you can select some or all of the documents in the Related items card and click **Edit**. 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. Alternatively, you can mass PDF, Save as List, Image, or Tally/Sum/Average. To learn more, see [Mass operations in the Admin guide](#).

If you add the Edit field to your relational card view, you can click the Edit icon in the row of a document and immediately open that document in the Viewer with the layout ready to be edited.

Family Group
Document History

1
- 5 of 5
100
per page

| | Artifact ID | Control Number |
|--------------------------|-------------|-----------------|
| | = Filter | Filter |
| <input type="checkbox"/> | 1110600 | AZIPPER_0007291 |
| <input type="checkbox"/> | 1110601 | AZIPPER_0007293 |
| <input type="checkbox"/> | 1110602 | AZIPPER_0007299 |
| <input type="checkbox"/> | 1110603 | AZIPPER_0007300 |
| <input type="checkbox"/> | 1110604 | AZIPPER_0007491 |

Checked (0)
Edit

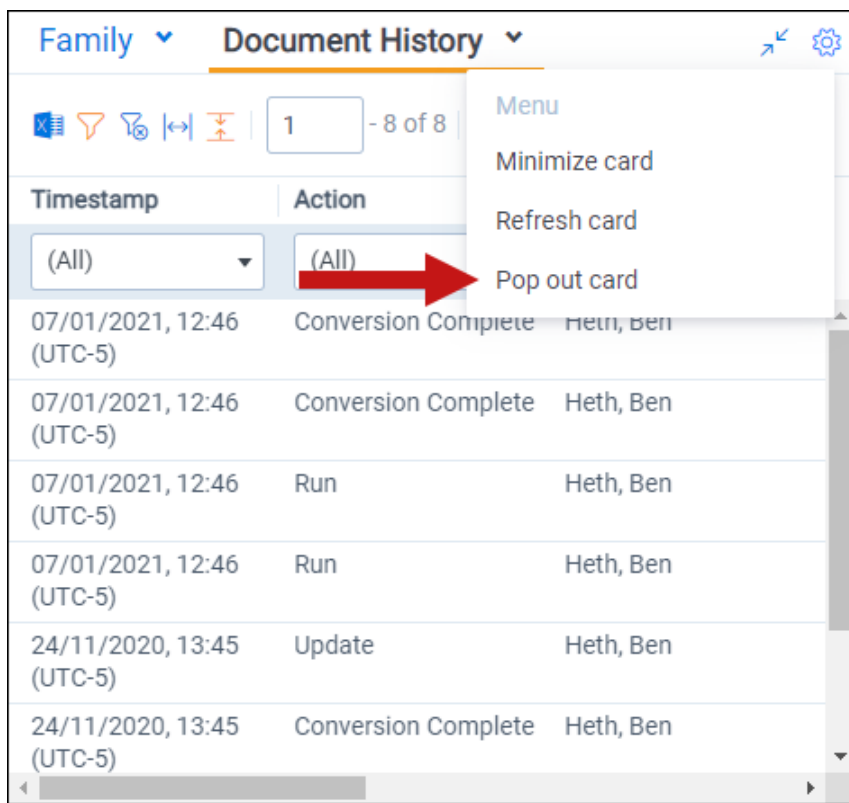
8.10 Document and Production History card

The Document History and Production History card is located in the bottom-right of the Viewer. This card displays either the document history or the production history, depending on which you have selected. The Document History card displays information about the most recent actions taken by users with the current document. The Production History card displays information on any productions that the current document was included in.

You can filter the columns to help find information or export the information in the Document History card to a .csv file.

You can refresh this card by clicking on the Menu icon and selecting **Refresh card**.

The Document History card can be opened in a separate browser window. Click the Menu icon and select **Pop out card** to open the card in its own window. Click the Menu icon and select **Pop in card** to close the browser window and return the card to the Viewer.



8.10.1 Document and Production History card permissions

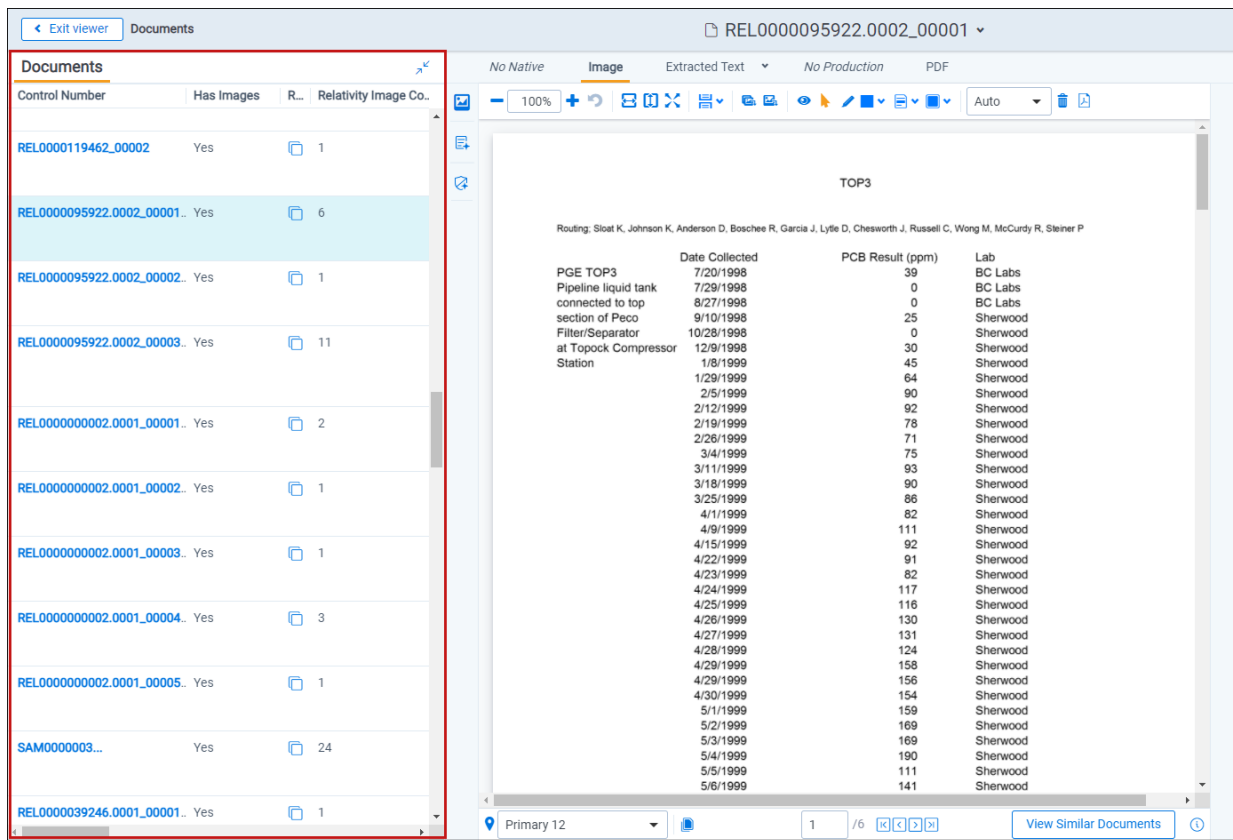
The following permissions are required to access Document and Production History:

| Object Security | Tab Visibility | Admin Operations |
|--|----------------|---|
| <ul style="list-style-type: none"> • Document - View • Production - View | | <ul style="list-style-type: none"> • View All Audits |

8.11 Documents card

The Documents card contains the document list so you can conveniently navigate from document-to-document without having to leave the Viewer. The fields that display in the card are based on which view is selected in the document list. Each time that you save a coding decision in the Viewer, the Documents card refreshes to show the latest results. The highlighted document in the document list now updates when you navigate from document-to-document to make tracking even easier.

If you're using Review Center, the Documents panel shows the documents in your current queue. For more information, see Reviewing documents using Review Center in the Review Center guide.



8.11.1 Email thread visualization tool

When you have installed and run an email threading structured analytics set for documents, you can use the email thread visualization tool. Launch the Email Thread Visualization pane, click the **email thread visualization** icon in the lower right corner of the displayed document in the Viewer. The email thread visualization pane expands and shows the thread group for the selected email in the Viewer.

Using this tool, you can visually examine email threads and how they are coded. You can also easily perform mass editing from this tool. See Email thread visualization in the Analytics guide for more information.

8.12 .eml and .msg header dates and times in the Viewer

.eml and .msg documents have header dates and times in Coordinated Universal Time (UTC) format. The Relativity Native Time Zone Offset field determines how the Viewer handles time zones for .eml, .msg, and RSMF documents.

Note: Relativity does not automatically account for Daylight Savings Time. If you need the Viewer to account for Daylight Savings Time, deploy the Set Native Timezone Offset with DST script. You must be a Relativity admin to deploy this script.

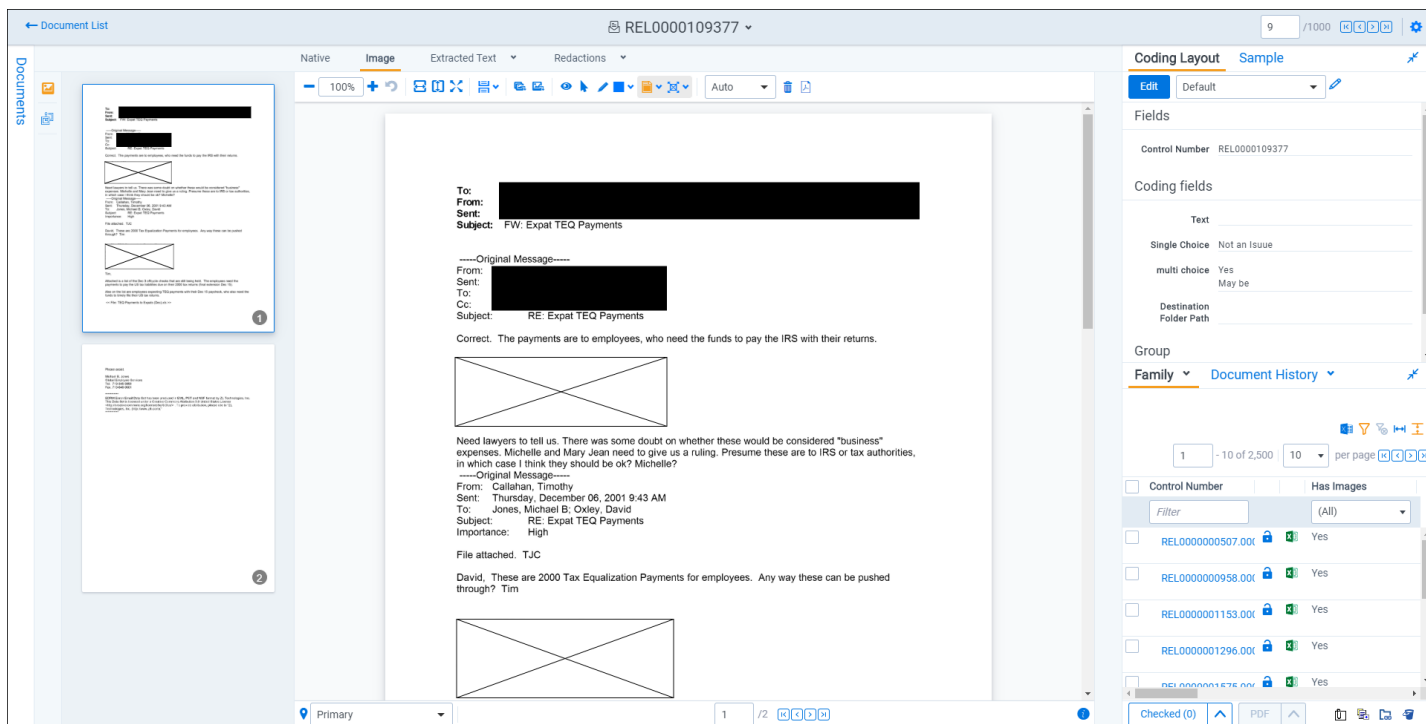
8.13 Thumbnail Viewer

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

To open the Thumbnail Viewer, click **Thumbnail** icon in the left drawer. The left drawer expands and displays the Thumbnail Viewer. Scroll up and down to navigate all pages in the open document and click a page to view it. As you scroll through the document, the thumbnail viewer scrolls simultaneously to keep the viewed pages in focus.

The Thumbnail Viewer is compatible with word processor, presentation, vector image, and raster image file types.

Note: The Thumbnail Viewer may not be available in the Native Viewer for document types that do not paginate such as spreadsheets or plain text.



8.14 Document Compare

You can use Document Compare to view the key differences between the extracted text of two documents. Unlike most fields, the Relativity Compare field is not visible on the Fields tab. To access Document Compare, you must first add the Relativity Compare system field to a view. See Views in the Admin guide.

| 1 - 100 of 15,937 100 per page | | | | | | | | |
|--------------------------------|--------------------------|----------------|----------------|--------------------|-------------|--------|-------|------------|
| # | | Control Number | Custodians | Primary Date/Time | Record Type | Com... | Issue | Email From |
| | | Filter | (All) | (All) | (All) | | (All) | Filter |
| 1 | <input type="checkbox"/> | WEY0000002620 | Weyland, Peter | 02/16/2001 5:24 PM | Email | | Gas | Zipper |
| 2 | <input type="checkbox"/> | WEY0000002621 | Arnold, Johnny | 02/16/2001 5:24 PM | Email | | Power | Zipper |
| 3 | <input type="checkbox"/> | WEY0000002622 | Zipper, Andy | 02/16/2001 5:24 PM | Email | | Gas | Zipper |
| 4 | <input type="checkbox"/> | WEY0000002623 | Weyland, Peter | 02/16/2001 5:24 PM | Email | | Gas | Zipper |
| 5 | <input type="checkbox"/> | WEY0000002624 | Arnold, Johnny | 02/16/2001 5:24 PM | Email | | Gas | Zipper |

To compare two documents in Relativity from the document list:

1. Click **Compare** icon to open the Document Compare selection window. By default the document identifier of the selected document populates the Document Compare window.
2. Click the **Select** button next to 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

... Clear ... Clear Compare

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)~~ (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; ~~for (vii) or (vii)~~

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


You can also compare related documents from within the Viewer. To compare related documents in the Viewer, open the Related Items pane and click the **Compare** icon next to the document you want to compare. The Document

Compare selection window opens. 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.

8.15 Viewer-supported file types

Relativity uses the Viewer to display rendered versions of native files. 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 .

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.

8.15.1 Text only designation

Some file types have a "text only" designation. When viewing these files in the Native 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.

8.15.2 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.

8.15.3 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 | |

| Program/File Type | Category | Type/Version | File Extension |
|---|-----------------|--------------|----------------|
| Microsoft Windows Compiled Help | Other | | .chm |
| Microsoft Windows Explorer Command | Other | | .scf |
| Microsoft Windows Help | Other | | .hlp |
| Microsoft Windows Shortcut | Other | | .ink |
| Trillian XML Log File | Other | 4.2 | |
| Adobe Photoshop PSD | Raster | | |
| TrueType Font | Other | | .ttf, .ttc |
| WebP | Raster | | |
| 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 - Presentation | Presentation | 2013, 2016 | |
| Note: Relativity does not support the password protected version for these three Strict Open XML file formats. | | | |
| Strict Open XML - Spreadsheet | Spreadsheet | 2013, 2016 | |
| Strict Open XML - Document | Word Processing | 2013, 2016 | |

8.15.4 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 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 | |

8.15.5 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 |
| LiveNote Evidence File | Archive | | .lef |
| 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 |
| TextMap Evidence File | Archive | | .xmef |
| 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 |

| Program/File Type | Category | Type/Version | File Extension |
|---|----------|--|----------------|
| SmartWare II DB | Database | 1.02 | .db |
| 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 |
| Note: .EML files that have a password or are encrypted are not supported in the Viewer. These documents will display the attachment but the body will appear blank. | | | |
| 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 |
| Note: 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. | | | |
| Microsoft Outlook (MSG) | Email | 97 - 2013 | .msg |
| 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 |

| Program/File Type | Category | Type/Version | File Extension |
|---|--------------|------------------------|-----------------|
| 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. | | | |
| Microsoft Live Messenger (via XML filter) | Other | 10.0 | |
| Microsoft OneNote | Other | 2007, 2010, 2013 | .one |
| Microsoft Outlook, Google Calendar, and Apple Calendar | Other | | .ics |
| 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 | |
| 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 |

| Program/File Type | Category | Type/Version | File Extension |
|--|--------------|---------------------------|----------------|
| Note: Beginning in Relativity 12.2.190.4 (Prairie Smoke 1), .pptx files that have Ink drawings are supported in the Native and Image Viewer. Any documents with Ink drawings that were imported prior to Relativity 12.2.190.4 will need to be reconverted to take advantage of this new functionality. | | | |
| 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 |
| HEIC Image file | Raster image | | .heic |
| JBIG2 | Raster image | Graphic Embeddings in PDF | |
| JFIF (JPEG not in TIFF format) | Raster image | | .jfif |
| 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 |

| Program/File Type | Category | Type/Version | File Extension |
|--|--------------|----------------|-------------------|
| 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 |
| PC Paintbrush DCX (multi-page PCX) | Raster image | | .dcx |
| 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 | | |
| WebP | Raster image | | |
| Note: WebP files are only available in the Native Viewer. | | | |
| 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 | |
| Apple iWork Numbers (MacOS, text, and PDF preview) | Spreadsheet | 09 | .numbers |
| Cellebrite Excel Report File | Spreadsheet | | .xlsx |
| Cellebrite Encrypted Excel Report File | Spreadsheet | | .xlsx |
| Enable Spreadsheet | Spreadsheet | 3.0 - 4.5 | |
| First Choice SS | Spreadsheet | Through 3.0 | |

| Program/File Type | Category | Type/Version | File Extension |
|---|-------------|------------------------|------------------------|
| 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 |
| Note: Excel files with slicers will convert and display normally in the Viewer, but slicer elements in those files will not display. | | | |
| 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 | Spreadsheet | 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, .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 |

| Program/File Type | Category | Type/Version | File Extension |
|--|-----------------|----------------------------|-----------------|
| 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 |
| 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 |

| Program/File Type | Category | Type/Version | File Extension |
|--|-----------------|---------------------------------|----------------|
| 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 |
| 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 |
| Adobe FrameMaker (MIF only) | Word processing | 3.0 - 6.0 | .mif |
| Adobe Illustrator Postscript | Word pro- | Level 2 | .eps |

| Program/File Type | Category | Type/Version | File Extension |
|---|-----------------|-----------------------------------|----------------|
| | cessing | | |
| 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 processing | Through 3.0 | .jw |
| 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 | |

| Program/File Type | Category | Type/Version | File Extension |
|------------------------------------|-----------------|--------------------|----------------|
| 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 processing | | .dif |
| 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 |


| Program/File Type | Category | Type/Version | File Extension |
|-------------------------------------|-----------------|--------------|----------------|
| 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 processing | Through 2.6 | .iwp |
| 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 |

| Program/File Type | Category | Type/Version | File Extension |
|----------------------|-----------------|--------------|----------------|
| 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.

8.15.6 Viewer audio and video-supported file types

Relativity can stream audio and video files within the Viewer.

This document provides a comprehensive list of file types supported by the Viewer. Certain file types may not be compatible with your internet browser, refer to the sections below to learn more about browser compatibility. Find out which Viewer version you have, by navigating to your Viewer and clicking .

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.

8.15.7 Troubleshooting errors

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

Unable to play audio stream

- Your browser may not support the audio codec.
- The native file may not have an audio stream.
- The native file may be partially corrupted.

Unable to play video stream

- Your browser may not support the video codec.
- The native file may not have a video stream.
- The native file may be partially corrupted.

Sorry, we're experiencing playback issues with this multimedia file.

- Ensure that you are connected to Relativity.
- Your browser may not fully support this multimedia format.
- The native file may be partially corrupted.

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.

8.15.8 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 | √ | | | |
| MPEG-1 audio - Layer 3 | mov - mp3 | √ | √ | | √ |
| MPEG-1 audio - Layer 2 | mp4 - mp2 | √ | √ | | |
| MPEG-1 audio - Layer 3 | mp4 - mp3 | √ | √ | √ | |
| Ogg Opus | ogg - opus | √ | √ | | |
| Ogg Vorbis | ogg - vorbis | √ | √ | | |

8.15.9 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 | | |

| File Format | Container - Video Codec - Audio Codec | Chrome | Firefox | Internet Explorer | Safari |
|-------------------|---------------------------------------|------------|------------|-------------------|--------|
| 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 | √ | | | |
| 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 | √ | √ | | |
| Ogg Theora Opus | ogg – theora - opus | √ | √ | | |
| Ogg Theora Vorbis | ogg – theora - vorbis | √ | √ | | |
| Ogg VP8 Opus | ogg – vp8- opus | √ | Audio-only | | |
| Ogg VP8 Vorbis | ogg – vp8 - vorbis | √ | Audio- | | |

| File Format | Container - Video Codec - Audio Codec | Chrome | Firefox | Internet Explorer | Safari |
|-------------|---------------------------------------|--------|---------|-------------------|--------|
| | | | only | | |

9 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 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.

Note: As of February 2025, the new Feature Permissions redefines Relativity's security management by shifting the focus from Object Types and Tab Visibility to feature-based permissions. This new method is simply another option; any feature-specific permissions information already in this topic is still applicable. This new interface enables administrators to manage permissions at the feature level, offering a more intuitive experience. By viewing granular permissions associated with each feature, administrators can ensure comprehensive control, ultimately reducing complexity and minimizing errors. For details see [Instance-level permissions](#) and [Workspace-level permissions](#).

9.1 Creating and editing a workspace

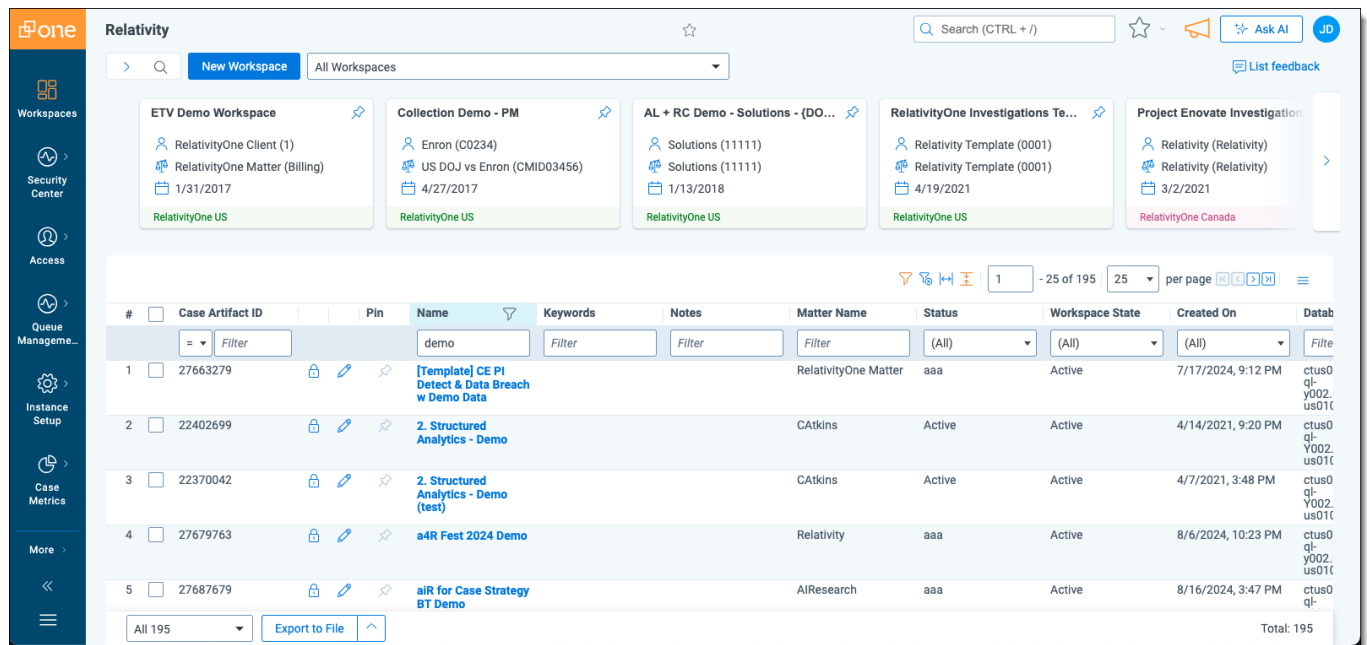
To create or edit a workspace:

1. Navigate to the **Workspaces** tab.
2. Click **New Workspace** to create a new workspace. If you want to edit an existing workspace, click the pencil  icon next to the workspace name.
3. Complete the fields in the form. See [Fields on the next page](#).
4. Click **Save**. A window displays the progress of the workspace creation process. You cannot access the workspace until it is created and its status is Active. If needed, close the progress window to continue working in RelativityOne. This will not interfere with the creation process.

Note: The workspace creation process cannot be canceled once it begins.

To find out the status of the workspace, review the Workspace State column in the Workspaces list:

- **Active**—the workspace is available for use.
- **Creating**—the workspace is in the process of being created.
- **Cold storage**—the workspace has been migrated to Cold Storage. See [Migrating and retrieving workspaces to and from cold storage on page 133](#).



9.2 Fields

The Workspace Information section fields are:

The screenshot shows the 'Workspace Information' form. It has fields for 'Name', 'Matter', 'Client', 'Template Workspace', and 'Project Type'. Each field has a 'Select' button next to it. The 'Project Type' field has a 'Choose...' button.

- **Name**—the name used to identify the workspace. This must not exceed 50 characters.

Note: You can edit a workspace name at any time without affecting any data. The root folder name for the workspace updates along with the workspace name.

- **Matter**—the case or legal action associated with the workspace. Click **Select** to choose a matter. The Select Item - Matter modal displays a list of matters based on the conditions set in the MattersOnPicker view.
- **Template Workspace**—an existing workspace structure used to create the new workspace. Click **Select** to select a template. The Select Item - Template Workspace modal displays a list of templates based on the conditions set in the WorkspacesOnPicker view. For more information, see the Admin Guide.

Notes:

- Any groups that are part of a template workspace will also be a part of the client domain workspace. We recommend removing these non-client domain groups to prevent the client domain admin from seeing information on non-client domain users and groups.
- We recommend selecting an empty workspace without any documents as a template to prevent potential errors when trying to clean up all the references.
- Workspace Admin and Client Domain Admin permissions are not copied from the workspace template when a new workspace is created. They are taken from the Sys Admin permissions.

All of the following non-document objects in the template copy to the new workspace:

- Analytics indexes
- Analytics profiles
- Automated workflows
- Choices
- Custom tabs
- Fields
- Filters for Repeated Content and Regular Expressions
- Groups, and permissions
- Imaging profiles
- Imaging sets

Note: To enable an automatic carryover of Imaging Sets to newly created workspaces, confirm the **Copy Instances on Workspace Creation** setting within the corresponding Object Type template workspace (Imaging Set) is set to **Yes**.

- Integration Point profiles

Note: Only export type Integration Point profiles with a source and destination of Relativity are copied.

- Layouts
- Markup sets
- Native types
- OCR profiles
- OCR sets

Note: To enable an automatic carryover of OCR sets to newly created workspaces, confirm the **Copy Instances on Workspace Creation** setting within the corresponding Object Type template workspace (OCR Set) is set to **Yes**.

- Persistent highlight sets
- Pivot profiles
- Placeholders
- Saved searches using Keyword, dtSearch, or Analytics indexes
- Scripts
- Search term reports
- Structured analytics sets
- Summary reports
- User objects
- Views

- **Project Type**—A categorization for workspaces. If desired, assign a project type to simplify monitoring, management, and exploration of your projects in Cost Explorer.

Note: Do not enter confidential customer or personal information.

Pre-defined values for your project type are listed below:

- Data Breach Response
- Data Subject Access Requests (DSARs)
- Freedom of Information Act (FOIA) Requests
- Internal Investigations
- Litigation - Antitrust and Competition
- Litigation - Class Actions and Mass Torts
- Litigation - Commercial and Financial
- Litigation - Criminal
- Litigation - Data Protection, Privacy, and Security
- Litigation - Intellectual Property
- Litigation - Labor, Employment, and Civil Rights
- Litigation - Other Civil
- Litigation - Regulatory and Environment
- M&A Clearance, 2nd Requests, Phase II Inquiries
- Merger & Acquisition (M&A) Due Diligence
- Operational Efficiency
- Personal Data Identification and Anonymization
- Regulatory Requests
- Third-Party Subpoenas
- 'Other' option with free-form text

The Advanced Settings section fields are:

The screenshot shows the 'Relativity' application window with the 'Workspaces' tab selected. The 'Advanced Settings' sub-tab is active, displaying configuration options for a workspace. The 'Status' is set to 'Active', the 'SQL Full Text Language' is 'English', and the 'Workspace Admin Group' has a 'Select' button. There are also input fields for 'Keywords' and 'Notes'.

- **Status**—identifies a workspace as active or inactive. This field has no impact the workspace functionality, but you can add it to views for filtering workspaces. Inactive workspaces can be accessed and edited.
- **SQL Full Text Language**—determines the correct word-break characters used in the full text index. Select the primary language for documents added to the workspace. The default setting is English. Note that for multiple language workspaces, Microsoft recommends setting the most complex prevalent language as the SQL Full Text language.

Note: The SQL Server settings determine the languages available in this list. Contact your system admin if you require additional languages. For information on configuring and managing word breakers, go to [Microsoft's guidance on Configuring & managing word breakers & stemmers for search \(SQL server\)](#).

- **Workspace Admin Group**—determines the group that has workspace admin permissions over this workspace. Click **Select** to choose a workspace admin group. See [Workspace admin group on page 138](#) for more information.
- **Keywords**—any keywords you want to associate with the workspace.
- **Notes**—any notes you want to add to describe the purpose of the workspace.

9.3 Viewing workspace details

On the Workspace Details tab, Relativity displays read-only workspace fields, history information, Relativity Utilities console, Production Restrictions, and the Workspace Admin Group field. You can update the Production Restrictions field when you edit a workspace. See [Adding and editing production restrictions on page 137](#).

Workspace Details | Search Indexes | Object Type | Fields | Choices | Field Categories | Layouts | Views | Tabs | Relativity Applications | More

Edit | Delete | Back | View Audit

Workspace Information | Advanced Settings | Record History

Name: Documentation Team Workspace

Matter Number: 888

Matter: Documentation Team

Client Number: 888

Client: Documentation Team

RELATIVITY UTILITIES

System Section

Manage Workspace Permissions

Manage System Keyboard Shortcuts

View Another User's Personal Items

Migrate to Cold Storage

Relativity Downloads

Relativity Desktop Client

Note: Once a workspace is created, only System Administrators and Client Domain Administrators can make updates to the Matter object. Even users with full permissions for Matters and Clients will not have the ability to modify this object unless they are System Administrators or Client Domain Administrators.

9.3.1 Deleting a workspace

From the Workspace Details tab, you can delete the current workspace. Clicking **Delete** moves the workspace to the Recycle Bin. After you click **Delete**, a confirmation message appears with the Dependencies button. See the Relativity Documentation Site.

Note: You must have Delete permissions for the workspace object in order to delete a workspace.

When you delete a workspace in Relativity, it automatically moves to the Recycle Bin, providing a safety net for deleted workspaces. You can manually choose to permanently delete the workspace from the system or restore it within the **seven-day period** in the Recycle Bin.

During off-hours, the Case Manager agent deletes the following:

- Any documents in the Relativity file repository, except those loaded with pointers.
- dtSearch indexes.
- Analytics indexes and staging areas.
- The SQL database (Relativity does not delete database logs and backups).

9.4 Using the utilities console

Additional administrative features are available through the **Relativity Utilities** console on the Workspace Details tab.

RELATIVITY UTILITIES

System Section

Manage Workspace
Permissions

Manage System Keyboard
Shortcuts

View Another User's
Personal Items

Migrate to Cold Storage

Relativity Downloads

Relativity Desktop Client

9.4.1 System Settings

The console includes the following in the System Section:

- **Manage Workspace Permissions**—set permissions for the workspace.
- **Manage System Keyboard Shortcuts**—displays a pop-up for modifying the key combination used by system shortcuts. To use this, you must have security permission for the Admin Operation called *Modify System Keyboard Shortcuts*. See [Managing system keyboard shortcuts below](#).
- **View Another User's Personal Items**—displays a pop-up for selecting workspace users where you can view a user's personal items. This button is only available to system admins. See [Viewing the personal items of workspace users on page 133](#).
- **Migrate to Cold Storage**—displays a pop-up for migrating workspaces to Cold Storage. To use this, you must be a system admin and have the security permission for the Admin Operation called *Manage Cold Storage*. See [Migrating and retrieving workspaces to and from Cold Storage](#).

9.5 Managing system keyboard shortcuts

You can modify the system keyboard shortcuts for a workspace. These keyboard shortcuts are defined in Relativity for use in the review interface. You must have security permissions for the Admin Operation called *Modify System Keyboard Shortcuts*.

To manage system keyboard shortcuts, follow these steps:

1. Navigate to the **Workspace Details** tab.
2. Click **Manage System Keyboard Shortcuts** in the Relativity Utilities console.

System Keyboard Shortcuts

Keyboard Shortcuts Tips: • For Mac Users: Keyboard Shortcuts marked with Ctrl will map over to the Command key.

Cancel: ☐ Ctrl (Command for Mac) ☒ Alt ☐ Shift
Key: [Clear](#)

Create Full Page Redaction: ☒ Ctrl (Command for Mac) ☐ Alt ☒ Shift
Key: [Clear](#)

First Document: ☐ Ctrl (Command for Mac) ☒ Alt ☐ Shift
Key: [Clear](#)

Next Document: ☐ Ctrl (Command for Mac) ☒ Alt ☐ Shift
Key: [Clear](#)

Page Down/Next Image: ☐ Ctrl (Command for Mac) ☒ Alt ☐ Shift
Key: [Clear](#)

Previous Document: ☐ Ctrl (Command for Mac) ☒ Alt ☐ Shift
Key: [Clear](#)

Save: ☐ Ctrl (Command for Mac) ☒ Alt ☐ Shift
Key: [Clear](#)

Copy from Previous: ☒ Ctrl (Command for Mac) ☐ Alt ☒ Shift
Key: [Clear](#)

Edit: ☒ Ctrl (Command for Mac) ☐ Alt ☐ Shift
Key: [Clear](#)

Last Document: ☐ Ctrl (Command for Mac) ☒ Alt ☐ Shift
Key: [Clear](#)

Next Highlight: ☐ Ctrl (Command for Mac) ☒ Alt ☐ Shift
Key: [Clear](#)

Page Up/Previous Image: ☐ Ctrl (Command for Mac) ☒ Alt ☐ Shift
Key: [Clear](#)


Previous Highlight: ☐ Ctrl (Command for Mac) ☒ Alt ☐ Shift
Key: [Clear](#)

Save and Next: ☐ Ctrl (Command for Mac) ☒ Alt ☐ Shift
Key: [Clear](#)

Use the following instructions to modify a system keyboard shortcut key:

- Select or deselect one or more of the following check boxes: **Ctrl**, **Alt**, or **Shift** for the Control, Alt, and Shift keys, respectively.

Note: You must select either or both the **Ctrl** and **Alt** checkboxes. Relativity displays the error message <Invalid Keyboard Shortcut> when these checkboxes are not selected.

- In the **Key** drop-down menu, select a letter, number, or navigation key. The navigation keys include End, Home, Space, Return, Down Arrow, Up Arrow, Left Arrow, Right Arrow, Page Down, and Page Up.
- Click the **Keyboard Legend**  icon to display a list of keyboard shortcuts currently in use by the System and browsers. See Keyboard shortcuts legend.
- Click **Clear** to reset the options for keyboard shortcuts.

After you have completed your updates, click **Save** to display the Workspace Details page.

Note: You can create user-defined shortcuts when you add a new field to Relativity. See [Creating and editing fields](#), and [Creating keyboard shortcuts](#).

9.6 Viewing the personal items of workspace users

Access to View User's Personal Items is granted to System Administrators by default. All other groups must have the proper permissions. To view personal items, follow these steps:

1. Navigate to the **Workspace Details** tab.
2. Click **View Another User's Personal Items** in the Relativity Utilities console.
3. Select one or more users whose personal items you want to view, and move them to the right box using the arrows.

Note: To move multiple users between boxes, click the double arrows. You can also select and double-click on user names to move the between boxes.

4. Click **Save**.

9.7 Migrating and retrieving workspaces to and from cold storage

Cold storage stores data for retention when it's not accessed regularly. To use this feature, you need specific permissions and processes to migrate and retrieve workspaces. Archive inactive workspaces and retrieve them when needed.

9.7.1 Migrate workspaces to cold storage

You must have security permissions set at the workspace-level to edit the workspace, and the Admin Operation called *Manage Cold Storage* to migrate workspaces to cold storage.

The following minimum security permissions are required in order to migrate workspaces to cold storage:

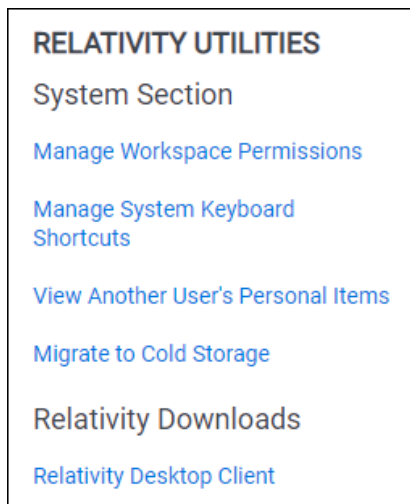
| Object security | Tab visibility | Admin operations |
|---|-------------------|------------------------|
| Instance level | | |
| Workspace: <ul style="list-style-type: none">• View, Edit, Delete | | Manage Cold storage |
| Workspace level | | Other Settings |
| Workspace: <ul style="list-style-type: none">• View, Edit | Workspace Details | View workspace details |

Note: Text migration jobs must be run before moving a workspace to Cold Storage.

To migrate workspaces to cold storage, follow these steps:

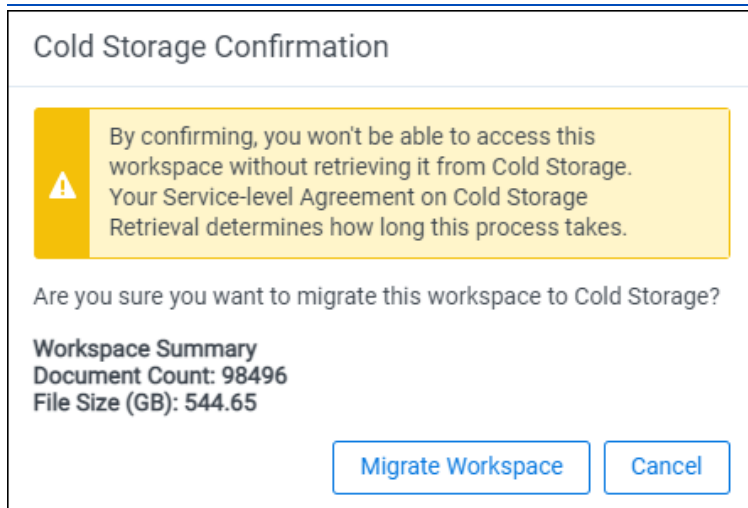
1. Navigate to the **Workspace Details** tabs.

2. Click **Migrate to Cold Storage** in the Relativity Utilities console. The Cold Storage Confirmation dialog box displays.



3. Click **Migrate Workspace** to migrate the workspace to cold storage.

Note: Migrating a workspace to cold storage is an immediate action that does not impact potential client-related due date charges. However, once data is migrated to cold storage, it becomes inaccessible.



4. The Storage Status column on the workspace view displays the status of the workspace as *Cold Storage*.

| # | Pin | Name | Case Artifact ID | Status | Client Name | Matter Name | Resource Pool |
|-----|-----|-------------------------|------------------|--------------|----------------------|----------------------|--------------------|
| 308 | | RundaleTest | 8639838 | Active | RelativityOne Client | RelativityOne Matter | RelativityOne Pool |
| 309 | | ROSE_Workspace | 7663153 | Active | UtopianTest | UtopianTest | RelativityOne Pool |
| 310 | | RVG Processing | 9345359 | Active | Relativity | Relativity | RelativityOne Pool |
| 311 | | RVG Test | 1181014 | Active | RelativityOne Client | RelativityOne Matter | RelativityOne Pool |
| 312 | | RVG Test | 8801233 | Active | RelativityOne Client | RelativityOne Matter | RelativityOne Pool |
| 313 | | Salt vs. Pepper | 10982694 | Cold Storage | Relativity Template | Relativity Template | RelativityOne Pool |
| 314 | | Sample Workspace | 9540302 | Active | Sample Client | Sample Matter | RelativityOne Pool |
| 315 | | Sample Workspace | 10599961 | Active | Sample Client | Sample Matter | RelativityOne Pool |
| 316 | | Test Workspace | 10599965 | Active | Sample Client | Sample Matter | RelativityOne Pool |
| 317 | | UWS | 10599997 | Active | Sample Client | Sample Matter | RelativityOne Pool |

Notes:

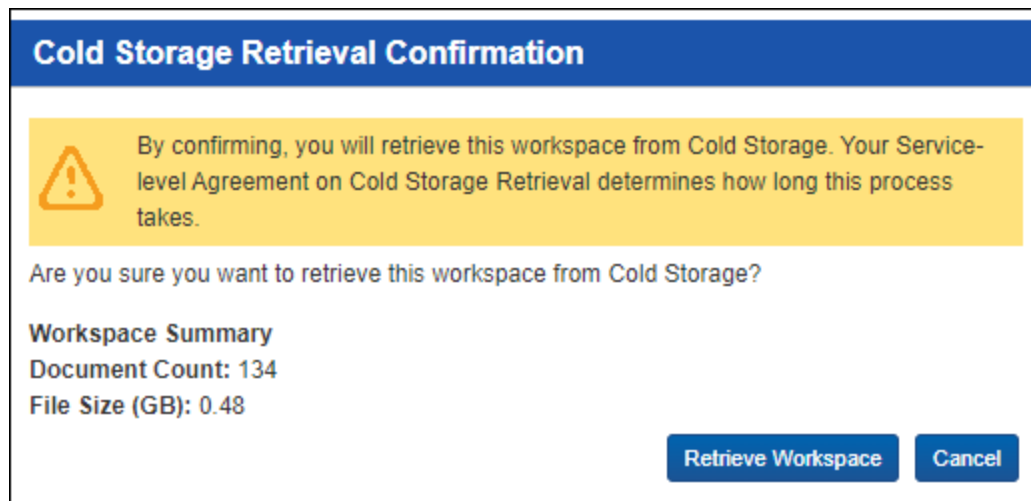
- A workspace in cold storage cannot be used as a template.
- A workspace in cold storage cannot be used by Import/Export or Integration Points.
- When you move a workspace to cold storage, billing continues at the original data tier rate until the start of the next calendar month. At that point, the system automatically switches to the cold storage rate.
- To qualify for the discounted cold storage rate, the data must remain in cold storage for the entire calendar month. To ensure this, move the workspace to cold storage before the end of the current month. For example, if you move a workspace to cold storage on the 3rd of the month, you won't receive the discounted rate until the following month.
- When you move a case between Review and Cold Storage, the system updates the billing status automatically. However, to qualify for the discounted cold storage rate, the case must remain in cold storage for the entire calendar month.
- Workspaces in cold storage can be archived directly using ARM without having to be moved to an active state before archiving. See the ARM content on the RelativityOne documentation site for more information.
- After moving a workspace to Cold Storage, it must remain there for **30** days before it can be deleted. For example, if you move a workspace to Cold Storage on *January 1st at 11:20 AM*, it will be eligible for deletion after *11:20 AM on January 31st*. Once 30 days have passed, the **"Delete Workspace"** button becomes available, allowing you to delete the workspace. Before 30 days, you cannot delete the workspace directly from Cold Storage.

9.7.2 Retrieve workspaces from Cold Storage

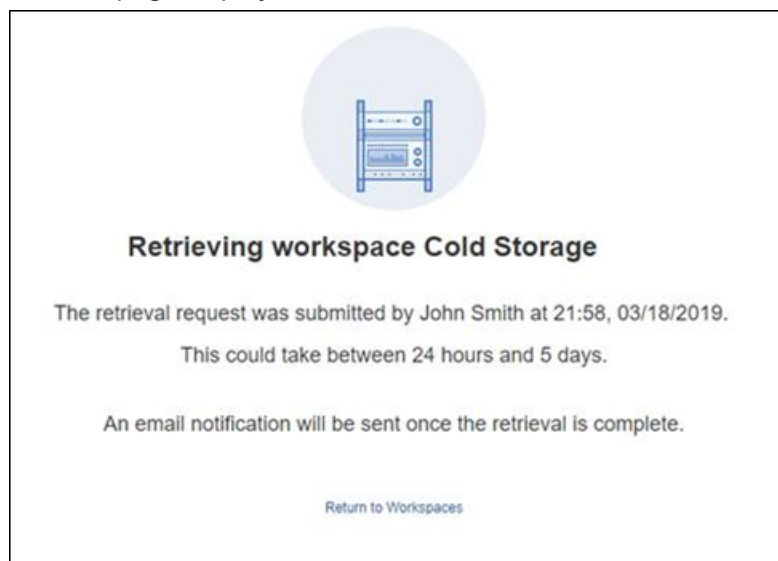
You must have the security permissions to edit the workspace and the Admin Operation called *Manage Cold Storage* to retrieve workspaces from cold storage.

To retrieve workspaces from cold storage, follow these steps:

1. Navigate to the **Workspaces** tab.
2. Click the workspace name of the workspace you want to retrieve from cold storage. The Cold Storage Retrieval page displays.
3. Click **Retrieve Workspace** to retrieve the workspace from cold storage. The Cold Storage Retrieval Confirmation pop-up displays.



4. Click **Retrieve Workspace** to retrieve the workspace from cold storage. The Cold Storage Retrieval confirmation page displays.

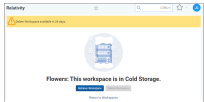


Notes:

- Workspace retrievals are not instantaneous after clicking **Retrieve Workspace**. It could take 1-5 days to resume operations in that workspace.
 - The user who sent the retrieval request will receive an email notification once the retrieval of the workspace is complete.
 - **Cold Storage Case Retrieval Agent** needs to be present and running for workspaces to be retrieved from cold storage.
 - Migration and retrieval actions are audited.
-

9.7.3 Deleting workspaces from Cold Storage

When you click the workspace you want to delete from Cold Storage, a screen will appear showing the number of days until the workspace can be deleted. This dynamic countdown displays the correct number of days remaining. After placing a workspace into Cold Storage, it can be deleted after **30 days**. Once 30 days have passed, the "Delete Workspace" button becomes available, allowing you to delete the workspace. Before 30 days, you cannot delete the workspace directly from Cold Storage.



9.8 Adding and editing production restrictions

Using the Production Restrictions option, you can ensure that your production set does not include privileged or other confidential documents. You can select a saved search that returns documents that you want excluded from the production set. When you run a production, Relativity compares these documents against those in the production and alerts you to any conflicts.

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

To add a production restriction:

1. Create a saved search with criteria that returns documents that you want excluded from the production set. Include family groups in your saved search so that all of the family items are kept together and can be removed if necessary.
2. Click to edit the workspace details page. You can only update the **Production Restrictions** option when editing a workspace. See [Creating and editing a workspace on page 125](#).

3. Select your saved search in the **Production Restrictions** option. The default value is <no restriction>.

The screenshot shows the 'Advanced Settings' tab for a workspace. The 'Production Restrictions' dropdown menu is highlighted with a red rectangle and is currently set to 'Privileged Documents'. Other visible settings include: Status (Active), SQL Full Text Language (English), Workspace Admin Group (Select), Keywords (empty text box), Notes (empty text area), Resource Pool (RelativityOne Pool), Database Location (ctus01412808W01.sql- y001.r1.kcura.com\ctus01412808W01), and Default File Repository (\\files\T008\Files\).

4. Run your production set. If a conflict occurs, you can override the production restriction if you're a system admin with the Override Production Restrictions permission. See Workspace security.

9.8.1 Managing production restrictions in templates

If you use a workspace with production restrictions as a template, you'll see a warning message that requires you to select one of the following options:

- Select a New Production Restriction
- Continue With No Production Restriction

You cannot delete the saved search that the Production Restriction option uses. You must first edit the Production Restriction option so that it no longer references the search.

9.9 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 near-complete control over all objects within the workspace, but members of the group do not have the script permissions available only to system admins.

Note: While Workspace Administrators have extensive control over their respective workspaces, they do not automatically inherit the full range of system administrator privileges. Non-standard permissions like "**New Document**" must be added. Additionally, the "**Workspace**" permission is initially set only to "**View**" status.

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

1. Click **Edit** on the **Workspace Details** tab.
2. Click **Select** in the **Workspace Admin Group** field.

3. Select 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.

9.10 Document and item list navigation

The workspace offers several ways to view documents and items. Using the Browsers panel, you can navigate from folder to folder to see the documents contained within each. The Document Preview panel allows you to view specific documents from the document list. Additionally, you can also sort and filter the document or item list based on any fields in the current view or using the search panel.

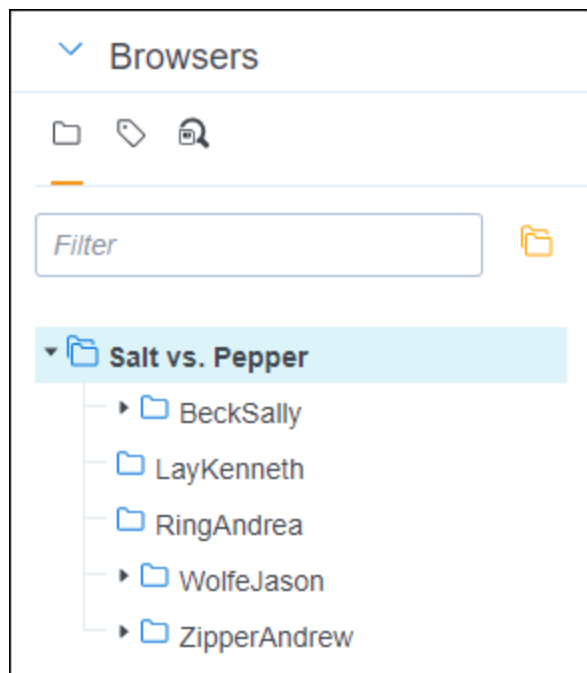
9.10.1 Browsers panel

The Browsers panel is located on the left side of the workspace. Depending on your permissions, you may not see the Browsers panel.

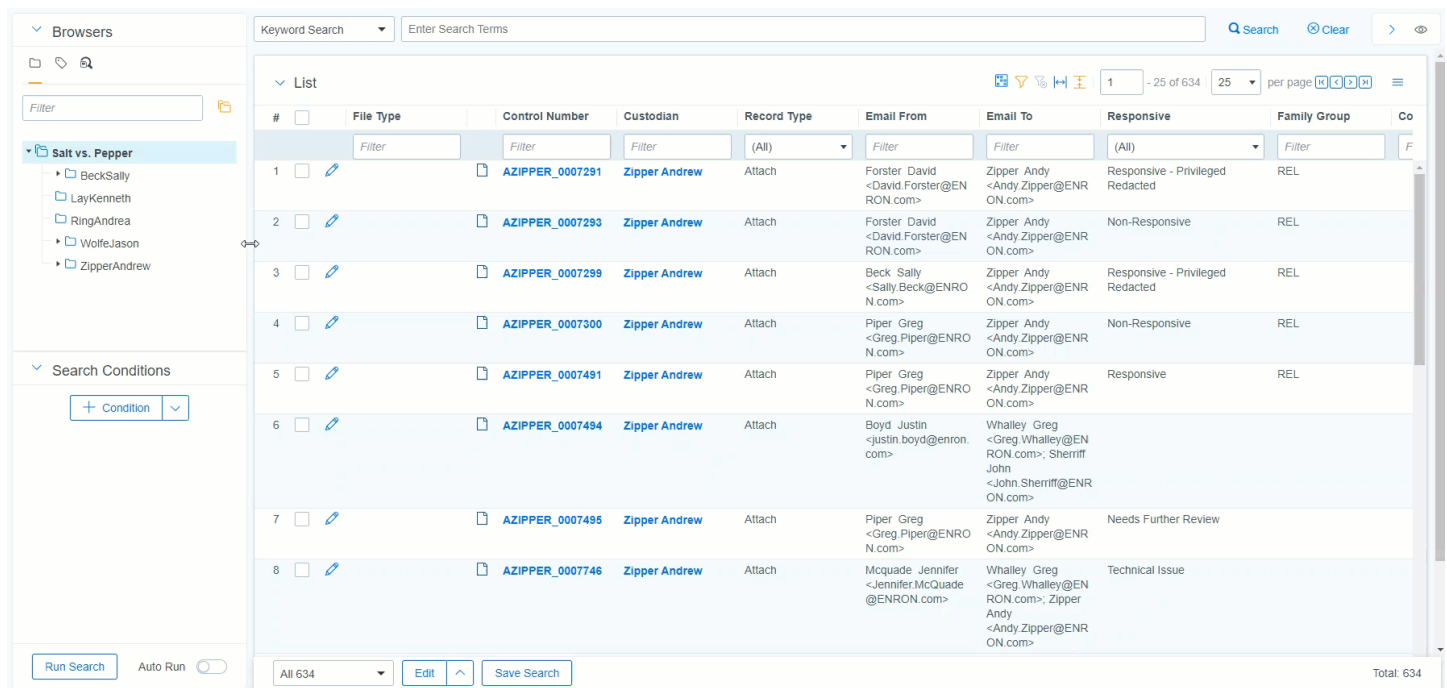
The Browsers panel may contain the following options for browsing through your documents:

- Folders
- Field Tree
- Saved Searches

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



The Browsers panel opens by default. Hide or expand the Browsers panel by clicking the carrot to the left of Browsers. If both the Browsers and Search Conditions panels are hidden, click on the Browsers icon to display it. You can also re-size the Browsers panel by hovering over the line separating the panel from the other panel or document list until the line is highlighted. You may then click-and-drag the line to the desired dimensions.



9.10.1.1 Document browser menu

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

| Icon | Name | Description |
|------|----------------|--|
| | Folders | Navigate the folder hierarchy for your workspace. |
| | Field Tree | Browse your documents according to how they were coded or grouped. |
| | Saved Searches | Create a new search, or browse previously saved searches. See Saved Search in the Searching Guide. |

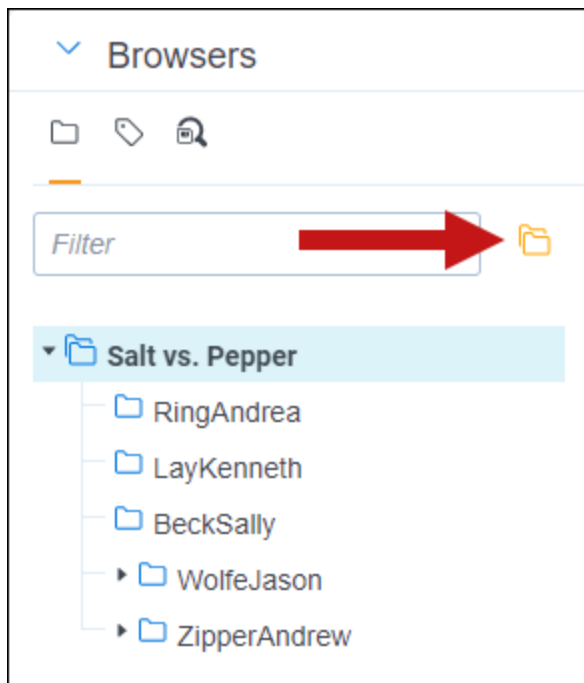
Folders

Click on the **Folders** 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 document list.

Note: To ensure stable performance, we recommend creating no more than 250,000 folders in a workspace and having 15 sub-folders or less within each folder.

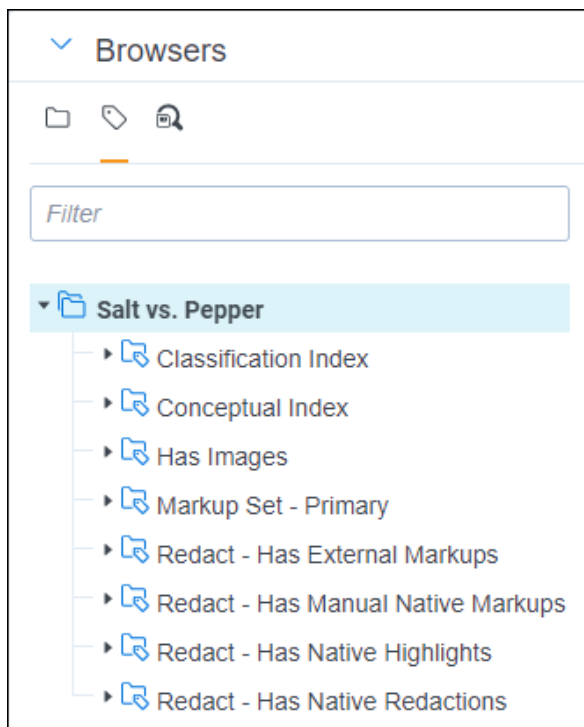
A folder often has multiple sub-folders. Click on the folder to view the sub-folders. Click on the arrow next to the folder to hide the sub-folders.

To change the folder scope, click on the **This folder and subfolders** or **Only this folder** icon.



Field tree

Click on the **Field Tree** icon to display the field tree in the browser. Selected single and multiple-choice list fields and their choices appear in a tree structure.

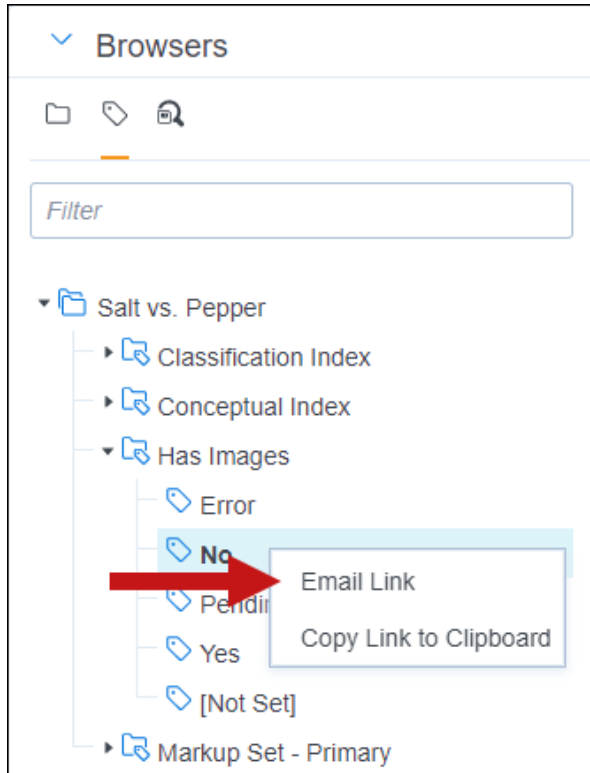


Each single and multiple-choice field has its own choice folder in the field tree. The field's choices appear as sub-folders. Each field also has a [Not Set] choice, which displays null values for the field.

You can click on a choice in the field tree to display all the documents in the document list that have the selected choice value and meet the criteria of the active view.

Sending email links to choices

You can send an email with a link to a view that contains the choice, a choice folder, or the document list that appears when the field tree is open. In the field tree, right-click on a choice or a choice folder and select the **Email Link** option.



The subject line of the email pre-populates with the following text: **Relativity Review - <Workspace Name> - <Choice Name: Value>**. If you send an email link to a choice folder, the subject line displays the folder name instead of choice name and value.

When the recipient clicks on the link, the documents associated with the choice or folder appear in the document list. If the recipient does not have required permissions for the choice folder or field associated with the choice, a permissions denied message displays instead.

Alternatively, you can select **Copy Link to Clipboard** to copy a link to a view that contains the choice, a choice folder, or the document list that appears when the field tree is open.

9.10.2 View bar

The View bar consists of the following elements:



- **New documents**—click to upload new documents using Simple File Upload. If the Transcripts application is installed in this workspace, this icon is replaced with a drop-down menu that allows you to choose between uploading a new document or a new transcript.
- **Views drop-down menu**—click to select a view.
 - **New view**—click to create a new view from within the view drop-down menu. This icon only displays if you have permission to add a new view. If the icon is not present, contact your Relativity administrator to add a view.

- **Edit view icon**—click to edit a view that displays within the view drop-down menu. This icon only displays if you have permission to edit the view. If the icon is not present, contact your Relativity administrator to edit the current 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.
- **Add Widget**—click to add a custom widget to your document list dashboard.
- **Dashboard drop-down menu**—select a custom dashboard to view in the document list. See Dashboards in the Navigation section of the Admin Guide for more information.
 - **New view**—click to create a new dashboard from within the dashboard drop-down menu. This icon only displays if you have permission to add a new dashboard. If the icon is not present, contact your Relativity administrator to add a dashboard.
 - **Edit dashboard icon**—click to edit a dashboard that displays within the dashboards drop-down menu. This icon only displays if you have permission to edit the dashboard. If the icon is not present, contact your Relativity administrator to edit the current dashboard.
- **Export Dashboard**—click and select a dashboard widget to download to your workstation as an editable Excel file. See Dashboards in the Admin Guide for more information.

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

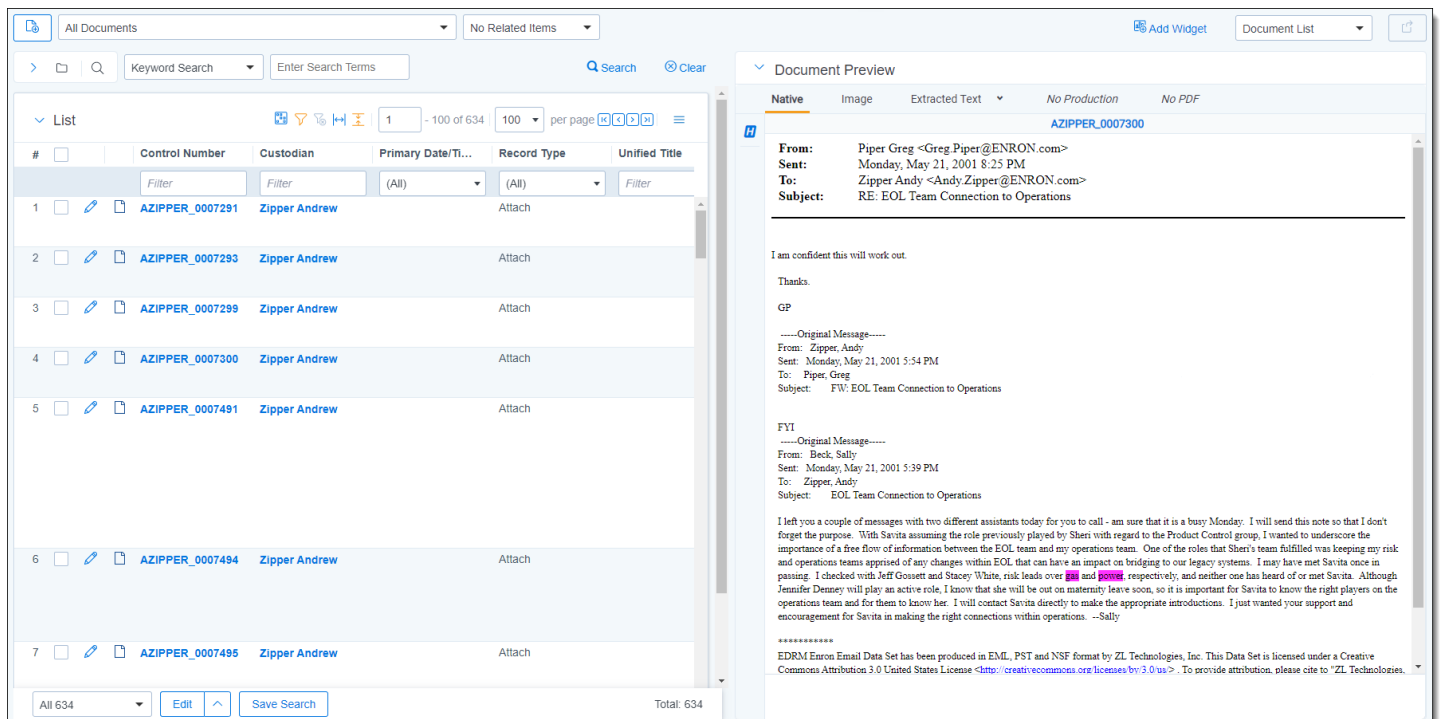
9.10.3 Document Preview panel

The Document Preview panel allows you to view documents similarly to the Viewer, while remaining on the document list. This allows you to filter the document list as desired and view the results without leaving the Documents tab. You can view and navigate through highlight hits for any previously created persistent highlight sets as well. However, you cannot search or create search terms in the Document Preview panel. Additionally, searching for terms in the document list will not create highlights in a document you are viewing in the Document Preview panel.

To access the Document Preview panel, the **EnableDocumentPreview** instance setting should be set to True. The

Show Document Preview Panel icon  will then display in the upper-right. Additionally, users must have the **Document Preview** permission in Other Settings assigned to use this feature.

Note: The Document Preview panel does not support viewing hidden content, creating or modifying markups, or editing coding decisions. Open the document in the Viewer instead to perform these tasks.



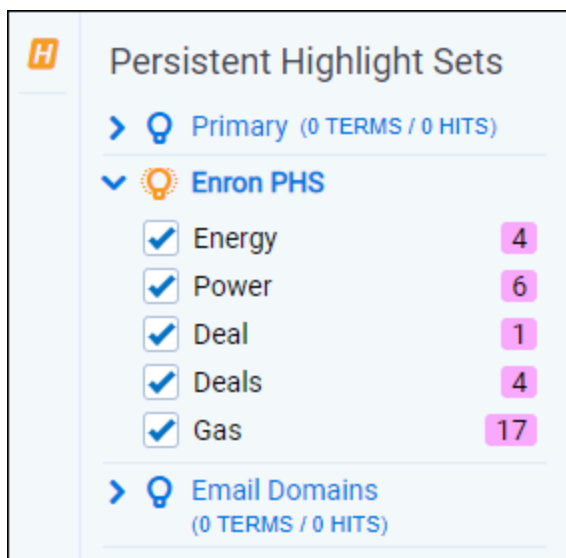
9.10.3.1 Navigating the Document Preview panel

The Document Preview panel can be re-sized at any time by clicking on the edge of the panel and dragging your cursor to the desired size.

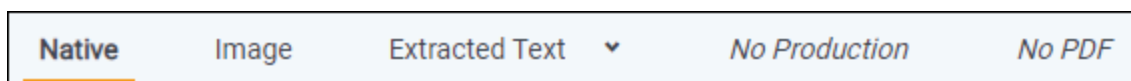
The Document Preview panel can be moved from the right or left side of the document list to the other side as well. To move the preview panel, click in the upper-left corner and drag the window to the blue strip on the other side of the screen.

The following options are available in the Document Preview panel:





- **Persistent Highlighting**—displays or hides a panel containing any persistent highlight sets in the workspace. Only terms that are in the current document will display in the pane. Additionally, you can control which highlights display in the current document by clicking on either the persistent set to only display highlights from that set or you can click on a specific term to only see that term highlighted in the document.



- **Document preview panel Viewers**—click on the name of the Viewer in which you would like to view the document. Viewer names that are displayed in black indicate that the document is available for viewing. The Viewer that is currently open is bold with an orange underline underneath the name. If a name appears in italics, that Viewer is not available for the current document.











- **Markup set**—displays the active markup set in a drop-down menu. Choose a markup set from the drop-down menu to make a different set active. This menu only appears when viewing a document in the Image Viewer of the Document Preview panel.
- **Page navigator**—use any of the following options to help you navigate the pages in the document you are pre-viewing:

| Option | Description |
|---|---|
|  | Click to move to the first page in the document. |
|  | Click to move to the previous page in the document. |
|  | Click to move to the next page in the document. |
|  | Click to move the last page in the document. |

9.10.4 Item list

























The item list contains items as well as navigational and other controls for working with the list.

| Icon | Description |
|--|---|
|  Inline Editing | Click to enable edit mode where a user can edit eligible fields from the document list. <hr/> Note: User access to Inline Editing is determined by permissions as well as on the view by a system administrator. As a result, some users may not see this icon, depending on which view they are using. |
|  Freeze/Unfreeze columns | Click the blue snowflake icon to refreeze columns that were most recently frozen. If the icon is orange, click it to unfreeze the columns. This option only displays if you have already frozen a column this session. |
|  Sampling | If you have proper permissions, clicking the Sampling icon lets you create random sample sets from the item list using three different methodologies from the pop-up menu that appears. |
|  Show/Hide filters | Click the blue filter icon to show filters for columns in the item list. Click the orange icon to hide them. |
|  Clear filters | Click the blue clear filter icon to clear any filters applied to the item list. |
|  Reset column sizes | Click the blue Reset column sizes icon to return to the original settings for the columns. |

| Icon | Description |
|--|--|
|  Turn Grid style on/off | Click the blue grid 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 document list. |

The fields that appear in the item list are based on the selected view, which you can edit. You can also edit a view to rearrange the order that the columns display. 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 resize 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.

| List | | | | | | | |
|--|---|-------------------------------------|-------------|--|--|----------------------------------|-------------------------------------|
| <div>     </div> <div> 1 - 25 of 634 25 per page     </div> | | | | | | | |
| # | Control Number | Custodian | Record Type | Email From | Email To | Responsive | Family Group |
| | <input type="text" value="Filter"/> | <input type="text" value="Filter"/> | (All) | <input type="text" value="Filter"/> | <input type="text" value="Filter"/> | (All) | <input type="text" value="Filter"/> |
| 1 |   AZIPPER_0007291 | Zipper Andrew | Attach | Forster David <David.Forster@ENRON.com> | Zipper Andy <Andy.Zipper@ENRON.com> | Responsive - Privileged Redacted | |
| 2 |   AZIPPER_0007293 | Zipper Andrew | Attach | Forster David <David.Forster@ENRON.com> | Zipper Andy <Andy.Zipper@ENRON.com> | Non-Responsive | REL |
| 3 |   AZIPPER_0007299 | Zipper Andrew | Attach | Beck Sally <Sally.Beck@ENRON.com> | Zipper Andy <Andy.Zipper@ENRON.com> | Responsive - Privileged Redacted | REL |
| 4 |   AZIPPER_0007300 | Zipper Andrew | Attach | Piper Greg <Greg.Piper@ENRON.com> | Zipper Andy <Andy.Zipper@ENRON.com> | Non-Responsive | REL |
| 5 |   AZIPPER_0007491 | Zipper Andrew | Attach | Piper Greg <Greg.Piper@ENRON.com> | Zipper Andy <Andy.Zipper@ENRON.com> | Responsive | REL |
| 6 |   AZIPPER_0007494 | Zipper Andrew | Attach | Boyd Justin <justin.boyd@enron.com> | Whalley Greg <Greg.Whalley@ENRON.com>; Sherriff John <John.Sherriff@ENRON.com> | | |
| 7 |   AZIPPER_0007495 | Zipper Andrew | Attach | Piper Greg <Greg.Piper@ENRON.com> | Zipper Andy <Andy.Zipper@ENRON.com> | Needs Further Review | |
| 8 |   AZIPPER_0007746 | Zipper Andrew | Attach | McQuade Jennifer <Jennifer.McQuade@ENRON.com> | Whalley Greg <Greg.Whalley@ENRON.com>; Zipper Andy <Andy.Zipper@ENRON.com> | Technical Issue | |
| All 634 Edit Save Search | | | | | | | Total: 634 |

9.10.4.1 Freeze and unfreeze columns in a list

When viewing and interacting with items in a list, you can freeze one or more columns so that they are locked in place which allows you to scroll to the right and view any columns in the list side-by-side with the frozen columns.

Salt vs. Pepper

Workspace Admin · Choices ☆

Search Indexes Object Type Field Categories **Choices** Layouts Views Tabs Relativity Applications Audit Migration Reports Audit Workspace Settings User Status

> Q New Choice All Document Choices

1 - 100 of 918 100 per page

| # | Object Type | Field | Name | Order | Sort Choices | Artifact ID | Created By | Created On | Full Path | Highlight Color | Keyboard Shor... |
|----|-------------|---------------------------|---|----------|------------------------|-------------|-----------------------------|--------------------|---|-----------------|------------------|
| | (All) | (All) | Filter | = Filter | = Filter | = Filter | Filter | (All) | Filter | Filter | Filter |
| 1 | Document | AL Designation | Relevant | 100 | Sort Top Level Choices | 1047378 | Service Account, Relativity | 9/11/2019, 8:24 PM | Relevant | Green | |
| 2 | Document | AL Designation | Not Relevant | 200 | Sort Top Level Choices | 1047379 | Service Account, Relativity | 9/11/2019, 8:24 PM | Not Relevant | Green | |
| 3 | Document | Confidential | Confidential | 10 | Sort Top Level Choices | 1038091 | Service Account, Relativity | 9/11/2019, 8:24 PM | Confidential | Green | |
| 4 | Document | Confidential | Highly Confidential | 20 | Sort Top Level Choices | 1038092 | Service Account, Relativity | 9/11/2019, 8:24 PM | Highly Confidential | Green | |
| 5 | Document | Confidential | Attorneys' Eyes Only | 30 | Sort Top Level Choices | 1038093 | Service Account, Relativity | 9/11/2019, 8:24 PM | Attorneys' Eyes Only | Green | |
| 6 | Document | Confidential | Confidential Subject to Protective Order | 40 | Sort Top Level Choices | 1038094 | Service Account, Relativity | 9/11/2019, 8:24 PM | Confidential Subject to Protective Order | Green | |
| 7 | Document | Confidential | Highly Confidential Subject to Protective Order | 50 | Sort Top Level Choices | 1038095 | Service Account, Relativity | 9/11/2019, 8:24 PM | Highly Confidential Subject to Protective Order | Green | |
| 8 | Document | Custodian - Single Choice | Andrew Zipper | 100 | Sort Top Level Choices | 1169539 | Lanter, Jeff | 4/22/2021, 4:19 PM | Andrew Zipper | Green | |
| 9 | Document | Custodian - Single Choice | Bill Williams | 200 | Sort Top Level Choices | 1169540 | Lanter, Jeff | 4/22/2021, 4:19 PM | Bill Williams | Green | |
| 10 | Document | Custodian - Single Choice | Alexis Farrell | 300 | Sort Top Level Choices | 1169541 | Lanter, Jeff | 4/22/2021, 4:19 PM | Alexis Farrell | Green | |

All 918 Copy

Total: 918

To freeze a column or columns, do the following:

1. In the right-most column that you wish to freeze, hover your cursor over the column's title and click on the ellipses.
2. Select **Freeze Columns**.
The column, or columns, to the left of the one you selected are frozen and will remain static as you scroll to the right and left in the list.

Note: Once you have frozen a column or columns, you can freeze additional columns to the right of the frozen columns by repeating steps 1-2.

To unfreeze a column or columns, do either of the following:

- Hover your cursor over the right-most frozen column, click on the ellipses, and select **Unfreeze Columns**.
- Click the **Unfreeze Column** icon in the upper-right section of the list.

9.10.4.2 Copy column values

You can copy up to 10,000 values in a single column to clipboard. If you would like to copy more than 10,000 columns, we recommend using Mass export to file.

To copy column values:

1. In the column that you wish to copy, hover your cursor over the column's title and click on the ellipses.
2. Select **Copy column values**.
A modal displays the total number of column values that were successfully copied to clipboard.

9.10.4.3 Saving a search from the Documents tab

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

9.10.4.4 Previewing a document

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 does not contain the file icon, contact your Relativity administrator to add it.

9.10.4.5 Sorting

You can use any field in the view to sort all of the results in an item list.

Click any field heading once to sort the items 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 items 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 are not able to sort a particular field, contact your administrator to make sure the field has the Sort option set to Yes.

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