

Case workspace quick reference guide

Use this guide to familiarize yourself with the case workspace.

The screenshot displays the Relativity case workspace interface with the following numbered callouts:

- 1**: Top navigation bar with the Relativity logo and user profile.
- 2**: Search bar with a search icon and a clear button.
- 3**: "Add Widget" button in the top right corner.
- 4**: "Document List" dropdown menu.
- 5**: "Document Preview" panel on the right side.
- 6**: Left sidebar navigation menu with icons for Documents, Processing, Search Setup, Review, Imaging & Production, aiR for Review, aiR for Case Strategy, and Review Management.
- 7**: Filter folder(s) section with a search bar and a list of folders.
- 8**: Search Conditions section with a "+ Condition" button.
- 9**: Document Preview panel showing email details for "Traders and Andy Ott Meeting".
- 10**: Filter folder(s) section with a search bar and a list of folders.
- 11**: Search Conditions section with a "+ Condition" button.
- 12**: Search Conditions section with a "+ Condition" button.
- 13**: Search Conditions section with a "+ Condition" button.
- 14**: Search Conditions section with a "+ Condition" button.
- 15**: Search Conditions section with a "+ Condition" button.

The main workspace area displays a table of documents with the following columns: #, Control Number, Primary Date/Ti..., Record Type, Responsiveness, and Relativity Compare. The table lists 19 documents, including entries like REL0000097541, REL0000104047.000, and REL0000096575.000.

Case workspace areas		
1	New document	Add new documents to Relativity using Simple File Upload.
2	View bar	Determines which documents and fields are displayed in the document list.
3	Add Widget button	Add a new Pivot or Cluster widget to the dashboard.
4	Dashboard functions	Where you can save your current dashboard.
5	Export Dashboard button	Click to export this dashboard's charts to Excel for further customization.
6	Document browser menu	Determines whether the browser displays folders, tags, or saved searches.
7	Sampling button	Use sampling to create a randomized sample of the documents.
8	Document list controls	Determines how your documents are displayed and allows you to navigate through them.
9	Document Preview	View documents in the document list before launching the Viewer.
10	Browser	Browse through documents using folders, saved searches, or the field tree.
11	Document list	The central location for viewing and acting on your documents.
12	Search panel	Create and set search and filter conditions for your documents.
13	Save search button	Click to save the current search conditions on your list as a new saved search.
14	Mass operations bar	Select an option from the menu to take mass action on some or all documents in the document list.
15	Total items	Displays the total number of documents in the set.

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