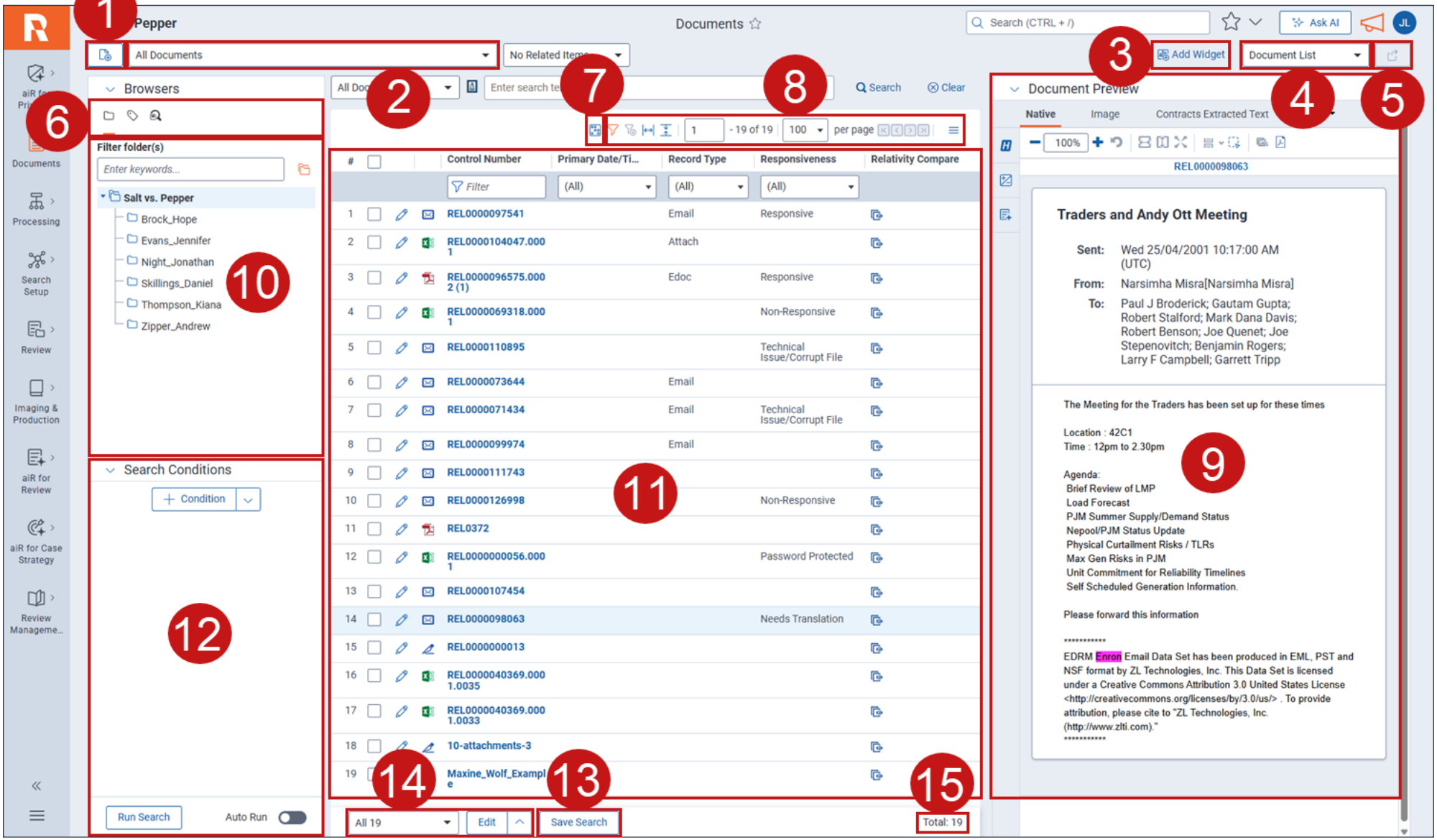
Case workspace quick reference guide

Use this guide to familiarize yourself with the case workspace.



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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