Relativity aiR

Transcripts application

October 12, 2026

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Table of Contents

1 Transcripts in Relativity **4**

1.1 Relativity.Transcripts 5

1.2 Transcripts application 5

1.3 Transcripts application comparison 5

1.4 Before you begin 6

1.4.1 Installation 6

1.4.2 Relativity.Transcripts 6

1.4.3 Transcripts billing and usage 6

1.5 Permissions 7

1.5.1 Relativity.Transcripts permissions 7

1.5.2 Transcripts application permissions 7

1.5.3 Reviewer security permissions 8

2 Annotating transcripts **8**

2.1 Designations and Exhibits tab 8

2.1.1 Uploading designations 8

2.1.2 Exporting a designations or exhibits report 12

2.2 Exhibits 12

2.2.1 Link an exhibit using Relativity.Transcripts 13

2.2.2 Linking to exhibits in Transcripts application 13

2.2.3 Remove an exhibit in Relativity.Transcripts 13

2.3 Designations 14

2.3.1 Viewing designations in the Viewer 14

2.3.2 Add a designation in Relativity.Transcripts 14

2.3.3 Add a designation in Transcripts application 15

2.3.4 Remove a designation 16

2.4 Additional Transcripts application features 16

2.4.1 Transcripts layout 17

2.4.2 Adding notes 18

2.4.3 Linking to URLs 19

2.4.4 Working with Case Dynamics 20

3 Copying text from a transcript **20**

3.1 Copying text only 20

3.2 Copying text with page:line numbers ... 21
4 Searching transcripts ... 21
4.1 Relativity.Transcripts ... 21
4.1.1 Transcript text searching ... 21
4.1.2 Persistent highlighting ... 21
4.2 Transcripts application ... 22
4.2.1 Word Index ... 22
5 Transcript reports and printing transcripts ... 22
5.1 Relativity.Transcripts ... 23
5.1.1 Creating a transcript report ... 23
5.2 Transcripts application ... 32
5.2.1 Creating a transcript report ... 32
5.2.2 Annotations Digest ... 32
5.2.3 Key Terms ... 34
5.2.4 Printing from the Viewer ... 35
6 Transcript supported file types ... 36
6.1 Supported file types ... 36
6.2 Transcripts application ... 37
6.2.1 Special considerations ... 37
6.2.2 Transcripts sync to video ... 37
6.2.3 Transcripts with hyperlinked exhibits ... 39
6.2.4 Text transcript file types ... 39
7 Transcript video clips ... 44
7.1 Transcripts application ... 44
7.1.1 View video clips ... 44
7.1.2 Create a video clip ... 44
7.1.3 Edit a video clip ... 45
7.1.4 Export a video clip in .css or .csv ... 47
8 Transcript Summary ... 49
8.1 Before you begin ... 49
8.1.1 Permission ... 49
8.1.2 Relativity.Transcripts billing and usage ... 49
8.2 Creating a Transcript Summary ... 49
8.3 Viewing a Transcript Summary ... 52

8.4 Citation navigation ... 52
8.4.1 Citation navigation from the Viewer ... 52
8.4.2 Citation navigation from the Case Home tab ... 52
8.4.3 Downloading a Transcript Summary ... 52
8.4.4 Editing a Transcript Summary ... 53
8.4.5 Clearing a Transcript Summary ... 53
8.5 Transcript Summary prompt criteria ... 53
9 Transcripts tab ... 54
9.1 Transcripts list ... 54
9.1.1 Edit transcript details ... 55
9.1.2 Create and export a transcript report ... 55
9.2 Transcripts application ... 55
9.2.1 Notes tab ... 55
9.2.2 Exhibits tab ... 56
9.2.3 URLs tab ... 56
9.2.4 Comments tab ... 56
9.2.5 Designations tab ... 56
9.2.6 Designation Types tab ... 56
10 Upload transcripts ... 57
10.1 Permissions ... 57
10.2 Uploading transcripts ... 58
10.2.1 Viewing previously uploaded transcripts ... 60
10.3 Transcripts application ... 61
10.3.1 Special considerations ... 61
10.3.2 Upload a transcript from the Documents tab ... 62
10.3.3 Mass importing transcripts with Import/Export ... 66
10.3.4 Reading transcripts with page number ... 66
10.3.5 Supported file types ... 67
10.3.6 Editing the Transcripts Import Layout ... 68

1 Transcripts in Relativity

Using both Transcripts applications, you can annotate transcripts, generate summaries, and create reports to support your workflows. We support a range of transcript file types, and the exact experience may vary depending on the file type you're working with.

Today, the transcripts experience in Relativity is supported by two applications: Relativity.Transcripts and Transcripts application. Their capabilities partially overlap, and some features are available only in one application or the other. The two applications are now installed together to ensure access to the full feature suite.

Relativity also offers the AV Transcription application which analyzes audio and video files, then transcribes the spoken words into a text field. The functionality of this application differs compared to Relativity.Transcripts and the Transcripts application.

1.1 Relativity.Transcripts

Using the new Relativity.Transcripts application, you can import transcripts synced to multiple .mp4 video files. Relativity.Transcripts uses Import/Export to import MDB transcript files. The transcripts can then be linked to exhibits and you can apply designations to highlight important testimony.

You can also create summary of a transcript in the Viewer or on the Case Home tab using Generative AI to quickly find relevant information for your case. To learn more, see Transcript Summary. Once a transcript has been summarized, you can use citation hyperlinks to quickly find key pieces of information in the transcript.

1.2 Transcripts application

For other transcript file formats, you can use the legacy Transcripts application. This application gives users the ability to upload, review, code, and annotate transcript files in Relativity. You can also generate transcript summaries similar to the newer Relativity.Transcripts application.

1.3 Transcripts application comparison

The following table provides a side-by-side comparison of the features of these two applications:

Name	Relativity.Transcripts	Transcripts application
File types supported	.mdb with associated videos in .mp4 format	.ptf, .xmptf, .rtf, .trn, .lef, .xmef, .txt, .mp4
Import multiple files at once?	No, you can only upload files one at a time using Processing or Import/Export. To learn more, see	Yes, you can upload more than one document file at a time using Import/Export. However, you can only upload one file and video at a time using Simple File Upload.
Import/Export support	Yes, using Transcript MDB data.	Partially supported, using Raw (Unprocessed) data.
Upload from Documents tab	No	Yes, a single file at a time.
Create Transcript Summaries?	Yes	Yes
Where can Transcript Summaries be created?	Case Home tab and Review Interface	Case Home tab and Review Interface
Where can Transcript Summaries be viewed?	Case Home tab and Review Interface	Case Home tab and Review Interface

Name	Relativity.Transcripts	Transcripts application
Citation hyper-links	Yes	No
Designations	Yes	Yes
Upload des-ignations using .csv files?	Yes	Yes
Link to exhibits?	Yes	Yes
Notes	Yes, Document Comments offer similar functionality under a dif-ferent name.	Yes
Links to URLs?	No	Yes
Video clipping	No	Yes, video clip reports are exportable.
Transcript reports: Key terms, Annota-tions digest	Yes	Yes
Transcript print-ing	Yes	Yes

1.4 Before you begin

There are several things to consider before using the Transcript applications.

1.4.1 Installation

The Relativity.Transcripts and Transcripts application are now installed together. The latest version of these applications can be found in the Application Library and is part of the upgrade process.

1.4.2 Relativity.Transcripts

The following applications should be installed in a workspace before you begin using Relativity.Transcripts:

- Relativity.Transcripts
- Import/Export
- Processing
- Hydro Review Interface

Note: We recommend installing the Case Strategy application to maximize the functionality of Relativ-ity.Transcripts.

1.4.3 Transcripts billing and usage

A workspace fee is charged when you run the first successful Fact Chronology job using Case Strategy or Transcript Summary job. To learn more about Transcript Summary, see Transcript Summary. You receive a quota of documents, and after exceeding that quota, billing transitions to a per-document rate. The workspace fee also provides up to 150

GB of .mp4 deposition video hosting and unlimited witness summaries and deposition outlines. Any video storage beyond the 150 GB is charged at your contractual Review rate.

1.5 Permissions

Each Transcript application requires different permissions which are provided below.

1.5.1 Relativity.Transcripts permissions

Note: The permissions for this application have been updated so that the Relativity Transcripts Designation and Relativity Transcripts exhibit link are replaced by Transcripts - Designation and Transcripts Link to Url to help unify the Relativity.Transcripts and Transcripts applications.

The following permissions are needed to use Relativity.Transcripts:

Object Security
• **Case Strategy Case Document** - View, Edit, Add • **Transcripts - Designation** - View, Edit, Delete, Add • **Transcripts - Link to Document** - View, Edit, Delete, Add

1.5.2 Transcripts application permissions

The following permissions are needed to use the Transcripts application:

Object Security	Tab Visibility	Other settings

• **Document** - Add
Note: The **Document - Add** permission enables users to upload both transcripts and other documents to Relativity.
• **Transcripts - Designation** - View, Edit, Delete, Add
• **Transcripts - Designation Reference** - View, Edit, Delete, Add
• **Transcripts - Fact** - View, Edit, Delete, Add
• **Transcripts - Interview Question** - View, Edit, Delete, Add
• **Transcripts - Issue** - View, Edit, Delete, Add
• **Transcripts - Link to document** - View, Edit, Delete, Add
• **Transcripts - Link to Url** - View, Edit, Delete, Add
• **Transcripts - Location** - View, Edit, Delete, Add
• **Transcripts - Note** - View, Edit, Delete, Add
	• Transcripts (parent)
	  • Exhibits (child)
	  • Designations (child)
	  • Designations Type (child)
	  • Notes (child)
	  • Comments (child)
	  • URL (child)
	  • Video Clips (child)
		• Mass operations
		  • Delete
		  • Transcript Report
		• Admin Operations: Allow Import

Object Security	Tab Visibility	Other settings
• **Transcripts - Note** - Comment - View, Edit, Delete, Add • **Transcripts - Organization** - View, Edit, Delete, Add • **Transcripts - People** - View, Edit, Delete, Add • **Transcripts - Video Clip** - View, Edit, Delete, Add		

1.5.3 Reviewer security permissions

A system administrator can assign the following permissions to reviewers so that they can only add and apply designations when annotating transcripts.

Object Security	Tab Visibility	Other settings
• **Transcripts - Designation** - View, Edit, Delete, Add • **Transcripts - Designation Reference** - View, Edit, Delete, Add • **Transcripts - Link to document** - View, Edit, Delete, Add • **Transcripts - Location** - View, Edit, Delete, Add		

2 Annotating transcripts

You can add annotations to a transcript document as part of your Review process. The workflow you use varies depending on which transcript file type you are working with.

If you are working with an MDB file, you can use the Relativity.Transcripts application. If you are working with another transcript file type, you can use the Transcripts application.

The following table shows a comparison between the functionality of the two applications:

Name	Relativity.Transcripts	Transcripts application
Can you interact with Exhibits?	Yes	Yes
Can you interact with Designations?	Yes	Yes
Can you interact with Notes?	No, but you can add comments	Yes
Can you interact with URLs?	No	Yes

2.1 Designations and Exhibits tab

The Designations tab and Exhibits tab now display each annotation in a list no matter what file type they are added to. You can upload new designations from their respective tab. You can also export a .csv report to your workstation that includes whichever designations or exhibits you select.

2.1.1 Uploading designations

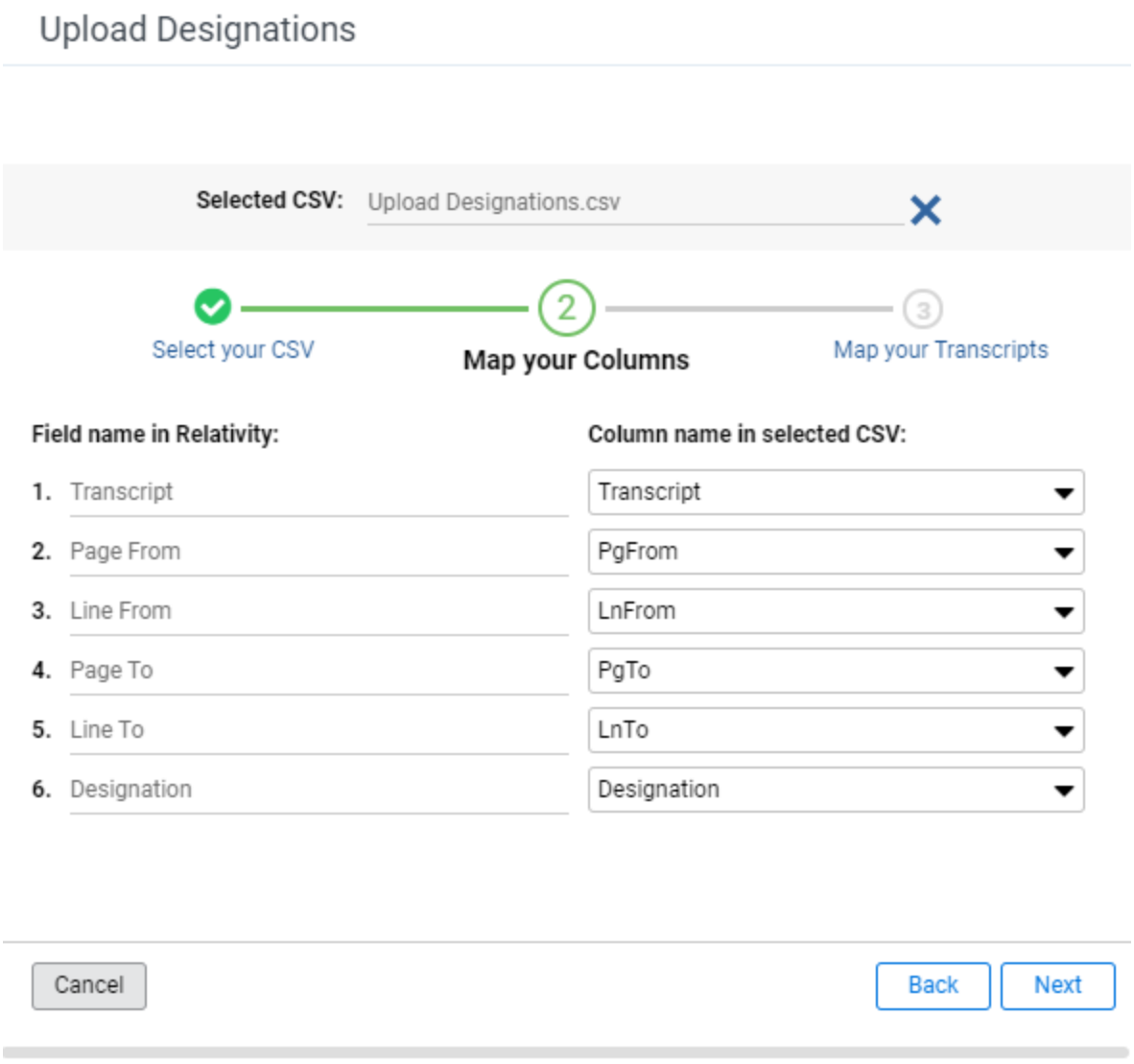
You can upload a .csv file containing designations and then view those designations in the Viewer alongside any existing designations that were already on the transcript.

The .csv file must have the following columns:

- **Transcript name** - The name of the transcript.
- **Page From** - The page number on the transcript where the designation starts.
- **Line From** - The line number on the transcript where the designation starts.
- **Page To** - The page number on the transcript where the designation ends.
- **Line To** - The line number on the transcript where the designation ends.
- **Designation** - The designation.

To upload designations from a .csv file:

1. Go to the Designations tab and click **Upload Designations**.
2. Drag and drop your .csv file into the pop-up window or click **browse for a file** and select your .csv file.
3. Verify that Relativity auto-mapped your columns correctly and click **Next**.



4. Verify that Relativity auto-mapped your transcripts correctly and click **Next**.
5. Click **Upload**.

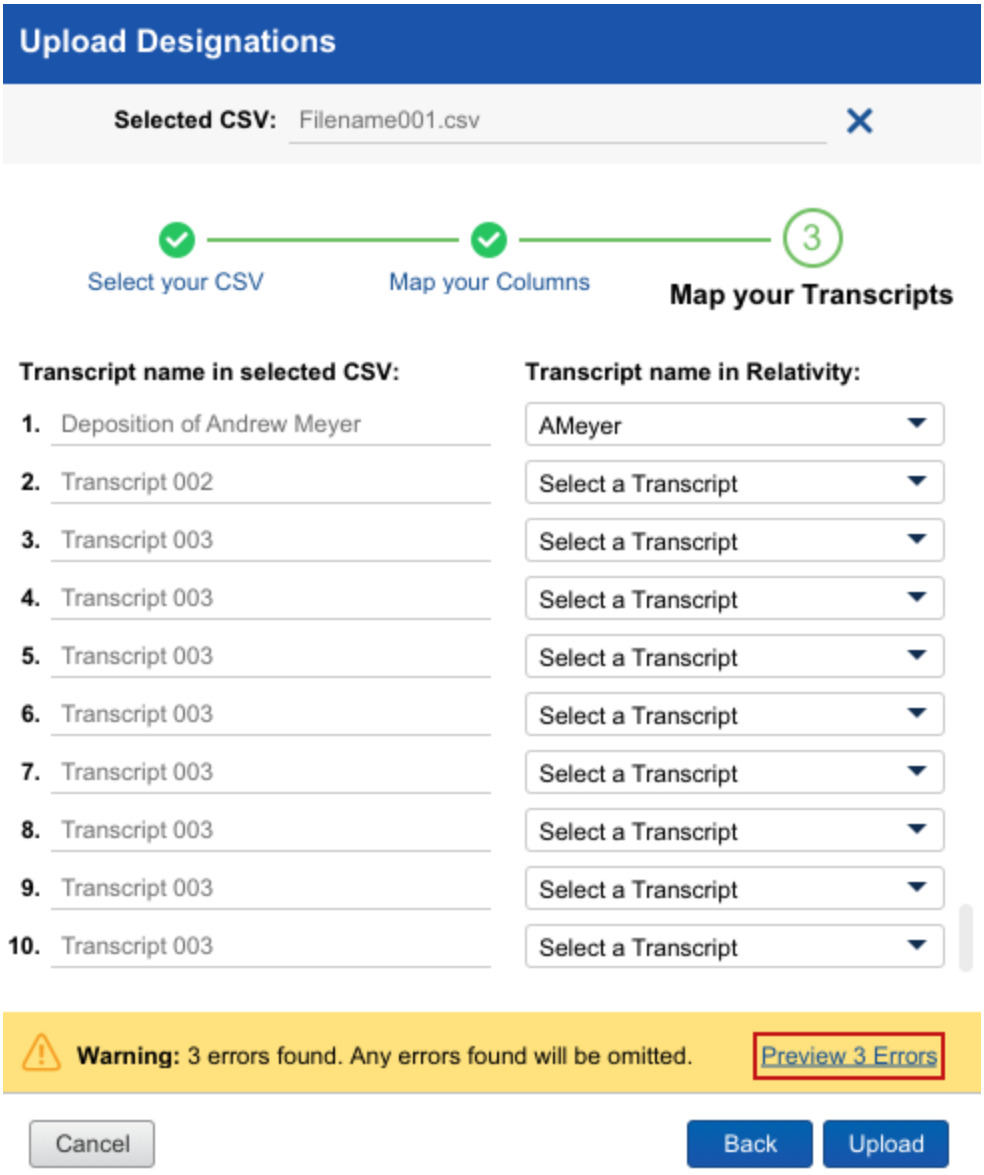
Note: The field for uploaded designations is the same field as designations that are added inline. This means that you will not be able to differentiate in the Viewer of the Review Interface between uploaded designations and designations added inline. To verify that your designations uploaded, look at the System created on field for designations.

2.1.1.1 Resolving upload designations warnings and errors

When you upload designations, two types of warnings and errors can occur - warnings related to missing data or data type errors in the .csv and import errors.

Uploading designations warnings occur when the .csv file has missing data or data in an invalid format. To resolve the warnings:

1. In the Upload Designations window, click the **Preview # Errors** link.
   The Preview Errors pop-up window will open. The Preview Errors pop-up window tells you the location of cells that have warnings attached to them in the .csv file.



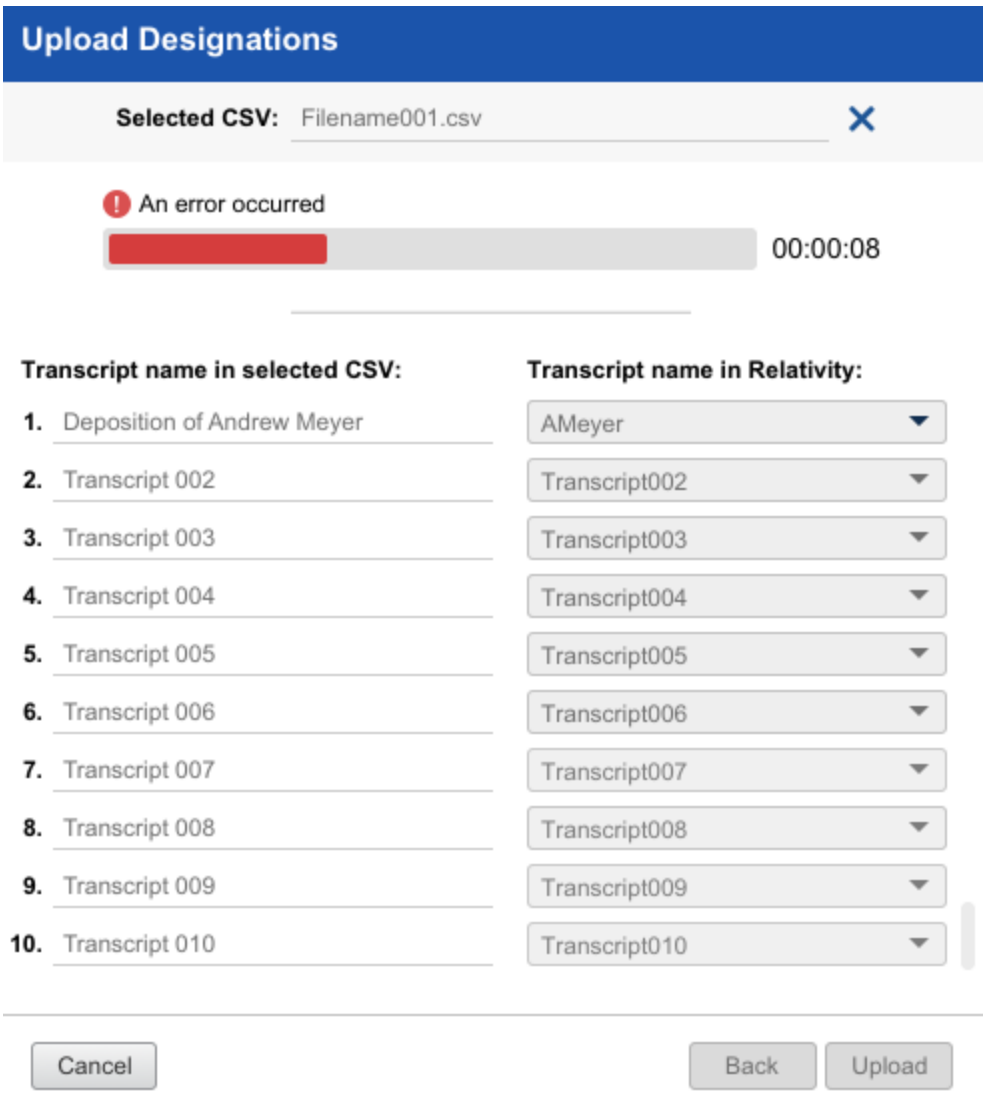
Preview Errors

Transcript	Start Page Number	Start Line Number	End Page Number	End Line Number	Designations
1 Christopher C. Van II TRN CH	3	No data exists for this column. Enter data.	No data exists for this column. Enter data.	15	d2
2 Christopher C. Van II TRN CH	No data exists for this column. Enter data.	1	18	10	d4
3 Christopher C. Van II TRN CH	1	Data is in an invalid format. Revise data format to meet column requirements.	Data is in an invalid format. Revise data format to meet column requirements.	9	D11
4 Christopher C. Van II TRN CH	Data is in an invalid format. Revise data format to meet column requirements.	16	34	5	D15
5 Christopher C. Van II TRN CH	15	14	32	13	No data exists for this column. Enter data.
6 Christopher C. Van II TRN CH	14	13	31	12	No data exists for this column. Enter data.

Total items: 6

2. Locate the cells that have warnings in the .csv file and resolve them by either entering the missing data or revising the data format to meet column requirements.
3. Upload the revised .csv.

When an import error occurs, go to the **Errors** tab to find our more information about the error.



2.1.2 Exporting a designations or exhibits report

You can download a designations or exhibits report in .xls, .csv file, or .dat format to your workstation using the Export to File mass operation:

1. Navigate to the **Designations** or **Exhibits** tab.
2. Select either any designations or exhibits from the list that you wish to export.
3. Select **Export to File** in the mass operations drop-down menu.
4. Complete the fields.
5. Click **Export**.
   The designations or exhibits are downloaded to your workstation.

2.2 Exhibits

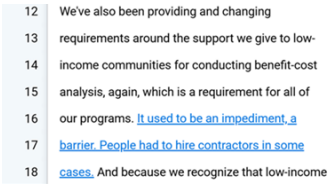
When reviewing transcripts, you can create direct references to exhibits using Relativity.Transcripts or the Transcripts application.

Note: If more than one user adds exhibit links or designations to the same transcript file at the same time, each user will only see the changes they have made until they refresh the page.

2.2.1 Link an exhibit using Relativity.Transcripts

To link text in a transcript to other documents:

1. On the **Documents** tab, select a transcripts file to open it in the Viewer.
2. Select the desired text and right-click it.
3. Hover your cursor over the **Link Exhibit** option.
4. Select one of the following options:
    - **Link This Occurrence** - Links exhibit only to the selected text.
    - **Link All Occurrences** - Links exhibit to all occurrences of the selected text in the transcript.
5. On the Link Exhibit modal, select the document would like to link to the selected text.
6. Click **Link Exhibit**.
   The highlighted text is a link that can be clicked to access the relevant document.



2.2.2 Linking to exhibits in Transcripts application

To link to an exhibit:

1. Select text and right-click.
2. Hover over **Link Exhibit**.
3. Select one of the following:
    - **Link This Occurrence** - Links exhibit only to the selected text.
    - **Link All Occurrences** - Links exhibit to all occurrences of the selected text in the Transcript.

    Note: When you select Link All Occurrences, you will see the progress as each occurrence is saved and you can continue working and completing other actions.
4. A pop-up appears. Select the document you would like to link and click **Set**.

You can remove the link by right-clicking and selecting **Remove Link**. If you click on the link, the document opens in another tab.

2.2.3 Remove an exhibit in Relativity.Transcripts

To delete an exhibit:

1. Right-click on the exhibit text.
2. Select the **Remove This Exhibit Link** option from the right-click menu.

3. Click on the **Remove Exhibit Link** option in the modal.
   The hyperlink is removed from the transcript.

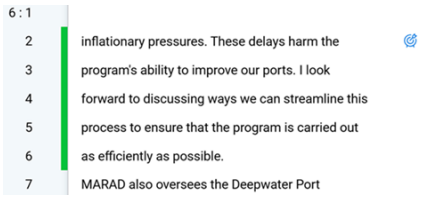
2.3 Designations

While reviewing transcripts, you can tag text as a designation to track it as part of your case strategy.

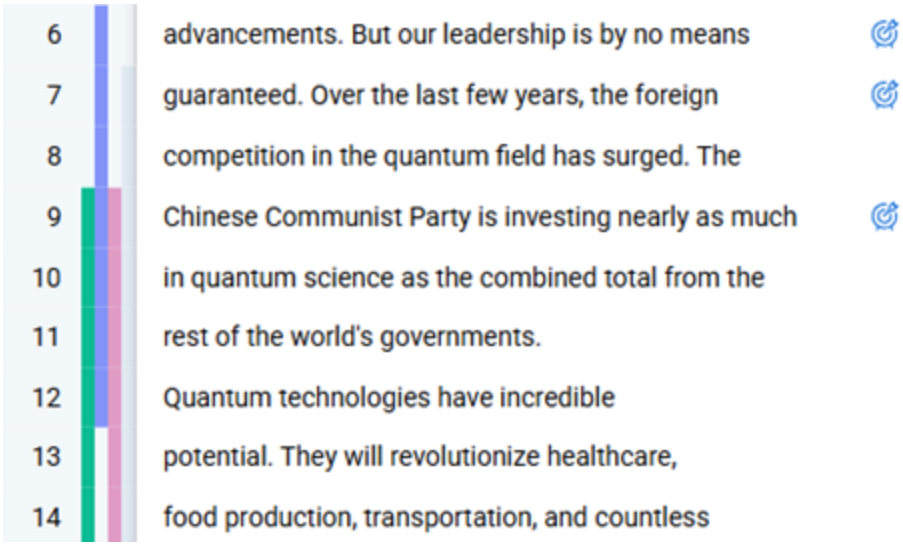
2.3.1 Viewing designations in the Viewer

If you open an MDB transcript in the Viewer, designations can display in two different ways in the and you can toggle between the options by clicking on the Designation Display icon.

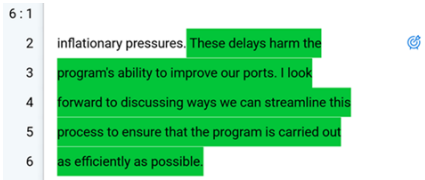
If Colors Bars is selected, each designation displays as colored bars to the left of the text in the Transcribed Text panel. This option is helpful if there are multiple overlapping designations in a transcript.



This option is helpful if there are multiple overlapping designations in a transcript.



If Highlights is selected, each designation displays as highlights over the text in the Transcribed Text panel.



2.3.2 Add a designation in Relativity.Transcripts

To add a designation to a transcript:

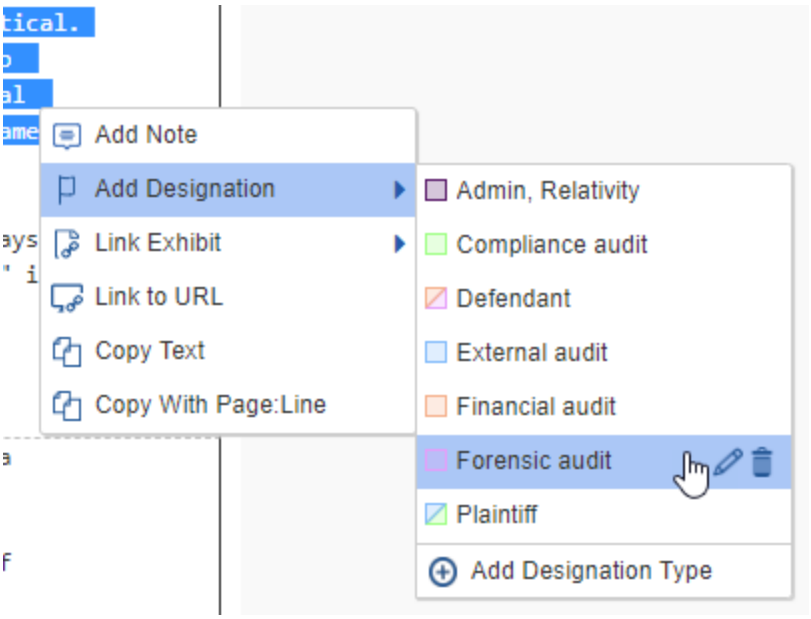
1. On the **Documents** tab, select a transcripts file to open it in the Viewer.
2. Select the desired text and right-click it.

3. Hover your cursor over the **Add Designation** option in the right-click menu.
4. Select the designation type by doing one of the following:
    - Select the desired **Designation Type** from the menu.
    - If the desired designation type is not in the right-click menu, you can search for it. To do so, expand the Coding Pane, and select the **Search All** option in the right-click menu. On the Select Designation Type modal, you can filter the list of designation types as needed. Select the desired designation type and click **Select** to apply that type to the selected text.

2.3.3 Add a designation in Transcripts application

To add a designation:

1. Select text and right-click.
2. Select **Add Designation**.
3. Select the **Add Designation Type** option to add a Designation Type or choose an existing designation type. The list of designations are alphabetized.

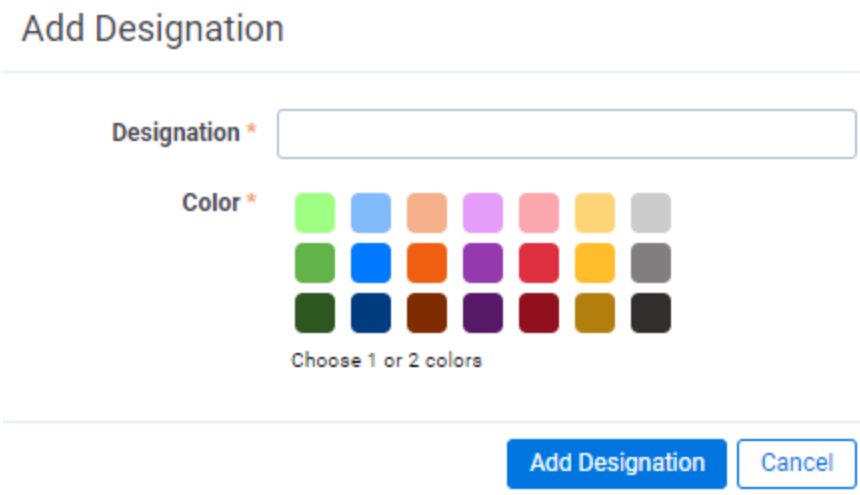


4. You can also edit or delete an existing designation.

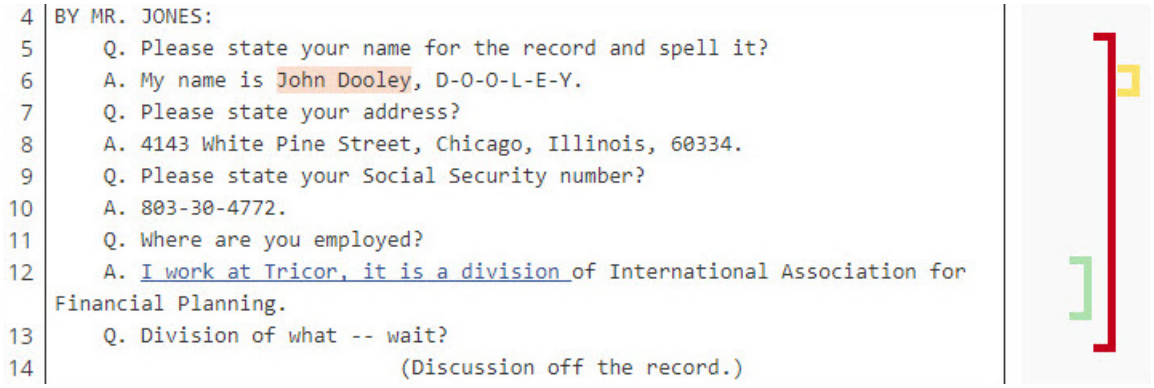
    Note: Deleting a designation removes all instances of the designation. You receive a warning notifying you before you delete.

5. A bracket appears in the margins. You can change the color of the bracket for all designations of that type by right-clicking on the bracket and selecting the drop-down arrow next to the designation type under **Change Designation**. You can also change the designation type or remove the designation by right-clicking.

When you add a Designation Type, a pop-up window appears where you can select up to two colors.



You can add designations over existing designation types. The brackets appear in the order the designations are created with the inner bracket being the first addition.



2.3.4 Remove a designation

To delete a designation:

1. Right-click on the **Designations** icon next to the designation you wish to remove.
2. Select the **Remove Designation** option from the right-click menu.

2.3.4.1 Change a designation type

To change a designation to a new designation type:

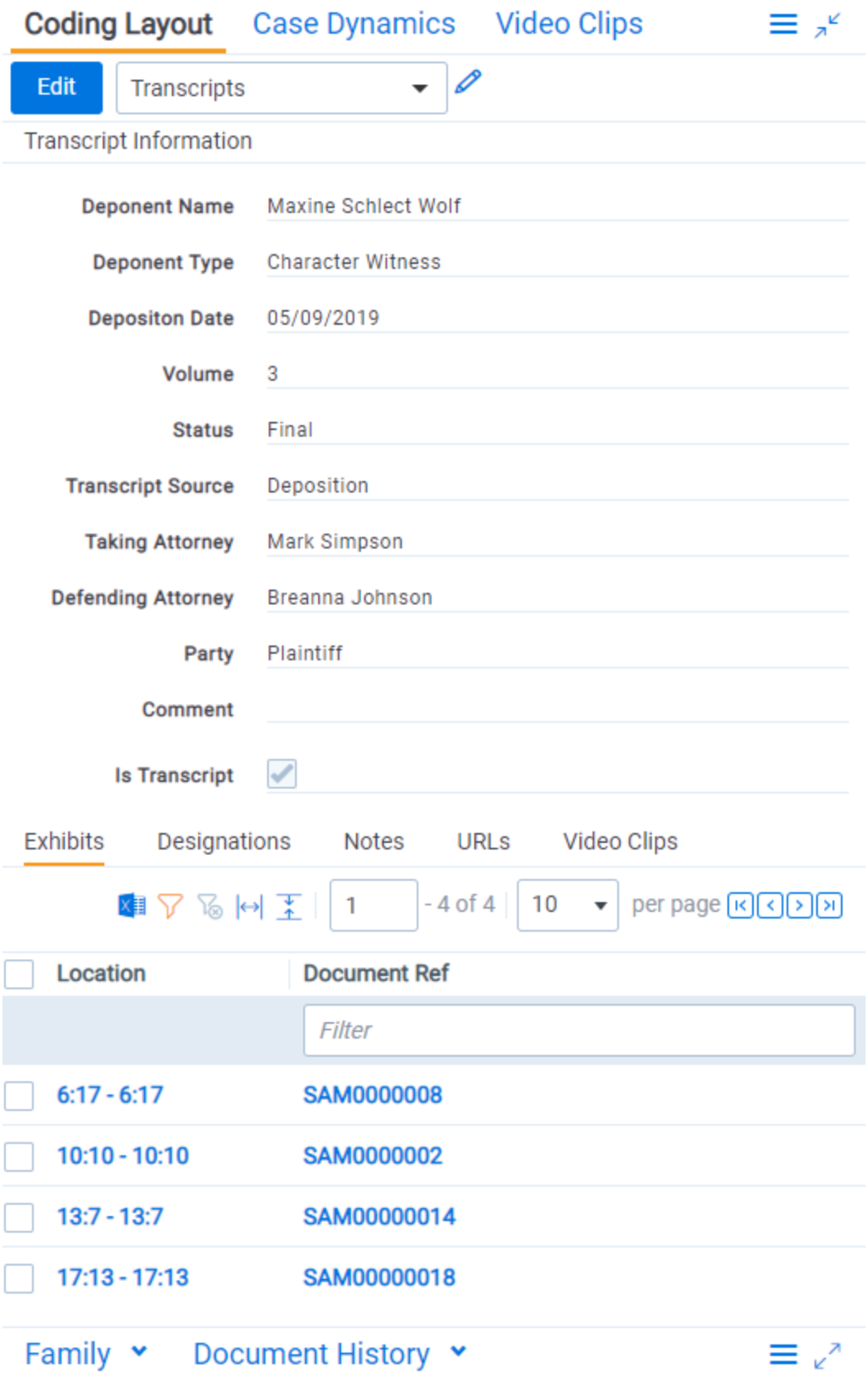
1. Right-click on the **Designations** icon next to the designation you wish to edit.
2. Hover your cursor over the **Change Designation** option.
3. Select the desired designation type to change the designation to the selected type.

2.4 Additional Transcripts application features

Note: If you want to see the full document while using Case Dynamics, you can open the document in the Pop-Out Viewer and still use the coding panel.

2.4.1 Transcripts layout

Annotations are logged in the Transcripts layout and are called out by page and line numbers. If you click on the line number, this takes you to the exact place the annotation is located on the transcript. Clicking on the Exhibit hyperlink opens the document in the Viewer. Clicking on the Note hyperlink sends you directly to the Notes object under the Transcripts tab. The objects on the tabs are sorted by the **Created On** field. The newest object created is listed first. For more information, see Transcripts tab.

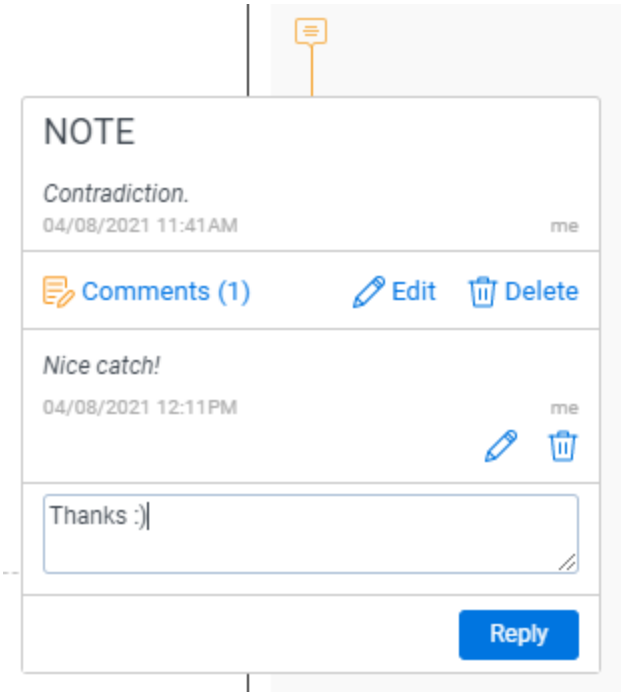


2.4.2 Adding notes

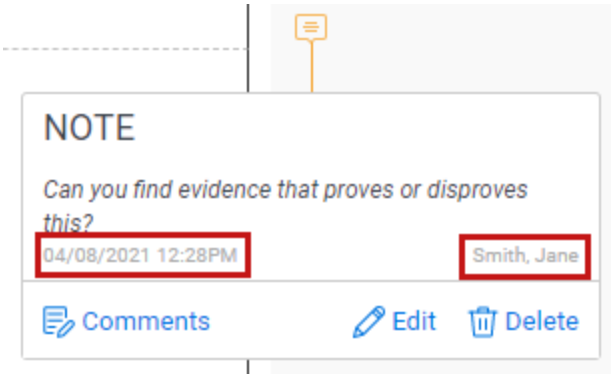
To add a note:

1. Select text and right-click.
2. Select **Add Note**. A pop-up appears in the margins.
3. Type your note.
4. Click **Save**.

You can then edit, delete, or comment on the note. Other users can comment on your note as well with the ability to create comment threads by replying. You can edit or delete your comments.



Comments and replies are time stamped along with the name of the user who left the comment.



2.4.2.1 Expanding notes

Sometimes there are many notes on a single page of a transcript and you cannot read the text all at once.

You can choose to expand or collapse all the notes in a page at once.

To expand/collapse notes, click on the Expand/Collapse Notes icon along the top of the Viewer. When notes are expanded, they will appear on the left side of the transcript text. Each note indicates which page and line number it is tied to.

2.4.3 Linking to URLs

To link to a URL:

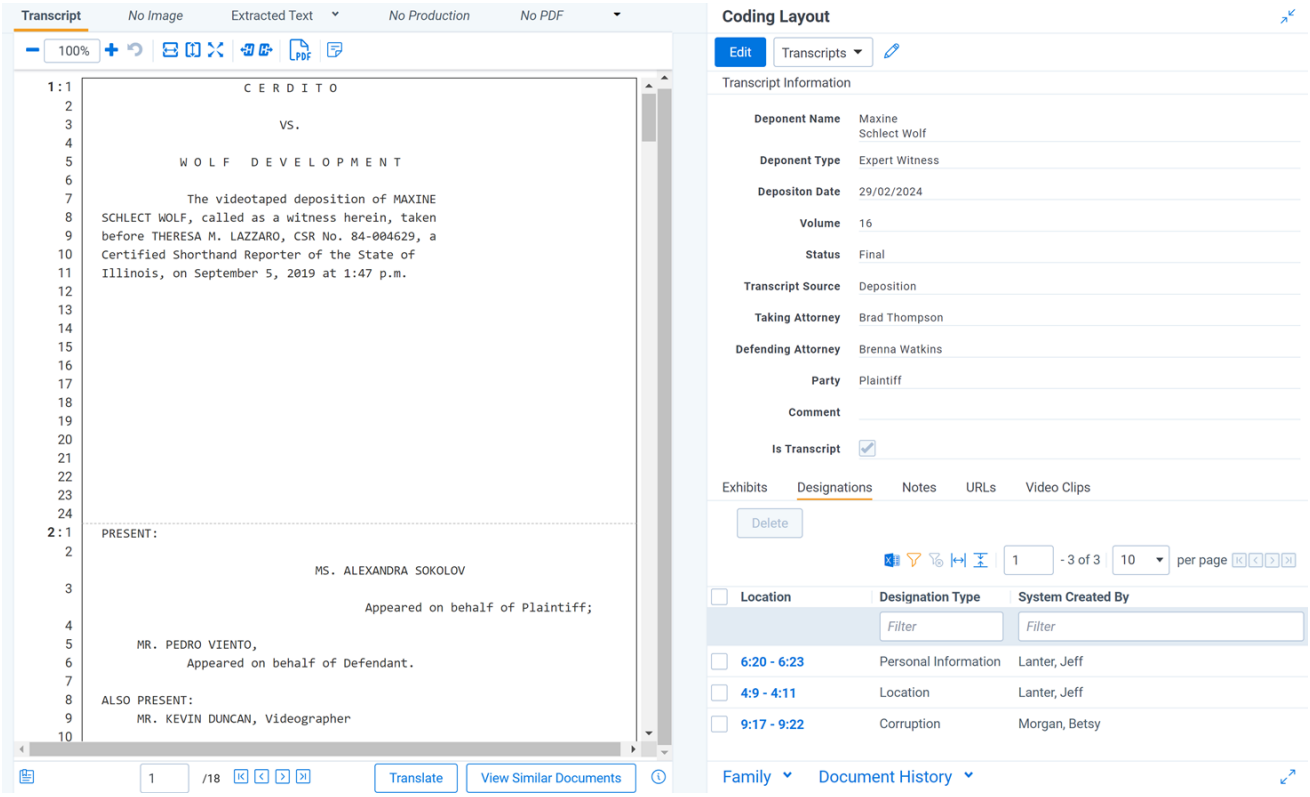
1. Select text and right-click.
2. Select **Link URL**. A pop-up appears.
3. Enter the URL.
4. Click **Link URL**.

You can remove the link by right clicking and selecting **Remove Link**. If you click on the link, the URL opens in a new tab.

2.4.4 Working with Case Dynamics

Note: The Classic Case Dynamics coding pane was deprecated on Feb. 28, 2024. Data that was created using the Classic coding pane will be preserved in Relativity.
To continue using Case Dynamics, verify that users have permissions to use Case Dynamics and excerpts so that they can immediately begin using the new workflow.
As part of the Classic Case Dynamics coding pane being deprecated, you can no longer see highlights from previously created objects.

You can create and link Case Dynamics items when viewing transcripts through the Case Dynamics coding pane on the Transcript layout. For more information, see Case Dynamics.



3 Copying text from a transcript

You can copy transcript text using either Relativity.Transcripts or the Transcript application. If you open an MDB file in the Viewer, you can copy text in the Transcript Text panel and if you open a .ptf, .xmptf, .rtf, .trn, .lef, .xmef, .txt, or .mp4, you can copy text in the Viewer.

3.1 Copying text only

To copy transcript text only:

1. Open a transcript in the Viewer.
2. Select the text you want to copy.
3. Right-click and select **Copy Text** from the menu.

3.2 Copying text with page:line numbers

To copy text with page:line numbers:

1. Open a transcript in the Viewer.
2. Select the text you want to copy.
3. Right-click and select **Copy With Page:Line** from the menu.

You can also use the following keyboard shortcuts after selecting the text you want to copy:

- **Ctrl + C** - copies text only.
- **Ctrl + Alt + C** - copies text with page:line numbers.

4 Searching transcripts

Depending on which type of transcript file you're using, the search features vary. You can search the Transcript text and use persistent highlighting with MDB transcript files. You can use the Word Index with all other supported transcript file types which lets you search for phrases in the text and navigate to specific lines within the transcript.

4.1 Relativity.Transcripts

4.1.1 Transcript text searching

You can search the text of a transcript MDB file in the Viewer using the Transcript text panel. After you enter a search term and initiate a search, any search term hits are identified and you can navigate through them.

- 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. Unlike dtSearch, the Viewer doesn't have an alphabet file or run on an index. So, while characters like - act as word breaks for searching, they do not for proximity.
- 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.

4.1.2 Persistent highlighting

You can see which persistent highlights are located in the text of a transcript MDB file using persistent highlight sets as well. If the Persistent Highlighting panel is expanded, any relevant terms display as well as any recent searches entered in the Transcript text panel. To learn more, see Transcript text searching.

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.

4.2 Transcripts application

4.2.1 Word Index

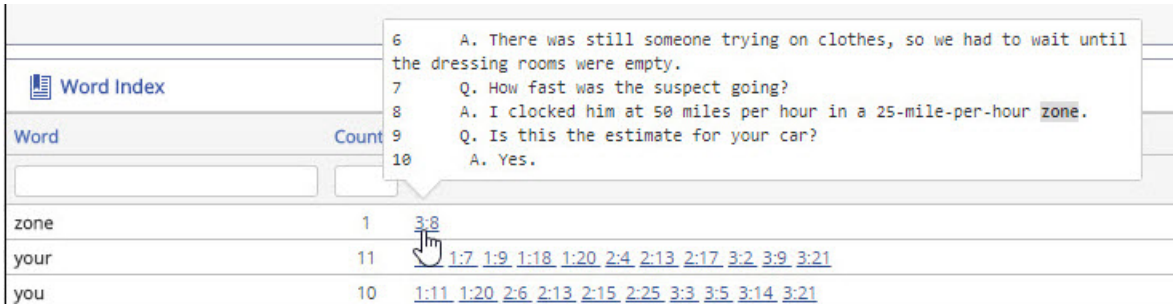
The Word Index lists out all the different terms that are found in the transcript.

4.2.1.1 Using the Word Index

To access the Word Index, click the **Word Index** icon, located along the bottom right corner of the Viewer.

You can search the Word Index for a phrase that has up to 5 words. For example, you can search for Exhibit 1.

When you hover over a location hyperlink, a pop-up appears that shows you the section of the transcript where the term appears. You can also filter by word or count.



You also have the ability to add up to three additional lines above and below the line where the term is located by using the tool tip. To access the tool tip, click **Gear** icon and enter the number of lines you would like to add above and below where the word is located. The default additional lines above and below is two.

4.2.1.2 Word Index fields

The Word Index contains the following fields:

- **Word** - contains the term.
- **Count** - contains how many times the term appears in the transcript.
- **Locations** - contains hyperlinks to all the places in the transcript where the term appears.

5 Transcript reports and printing transcripts

You can export the different annotations and items that have been linked to transcripts using either the Relativity.Transcripts or Transcripts application, depending on the file type you are working with. If you have an MDB file, you can use Relativity.Transcripts and you can use the Transcripts application if you have one of the following file formats: .ptf, .xmptf, .rtf, .trn, .lef, .xmef, and .txt.

Once you have downloaded a report to your workstation, you can conveniently print the PDF.

You can also print a .ptf, .xmptf, .rtf, .trn, .lef, .xmef, and .txt. transcript document from the Viewer using the Transcript application.

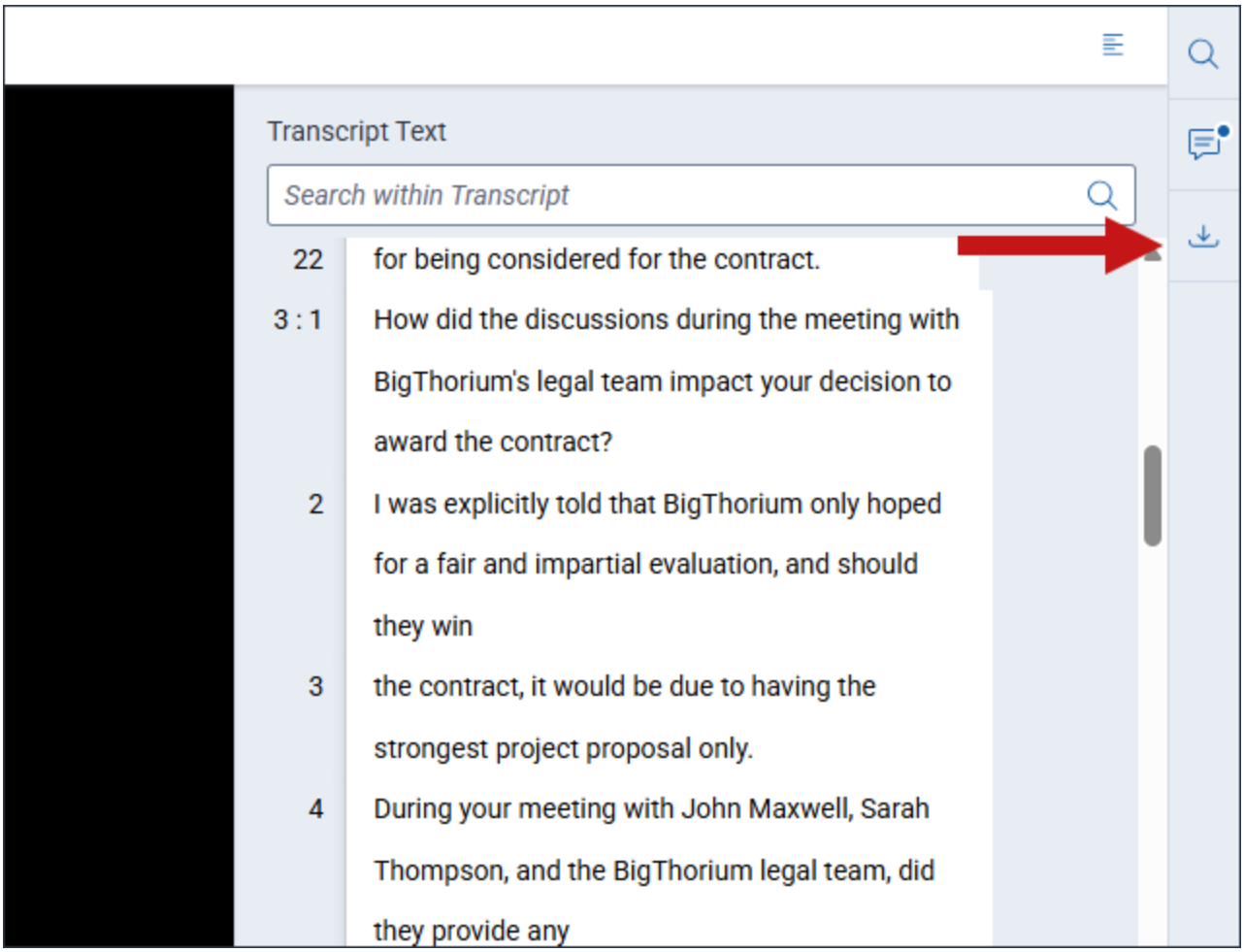
5.1 Relativity.Transcripts

5.1.1 Creating a transcript report

You can create a transcript report in the Viewer if you open an MDB transcript document or you can create a report from the Transcripts tab.

To create a transcript report:

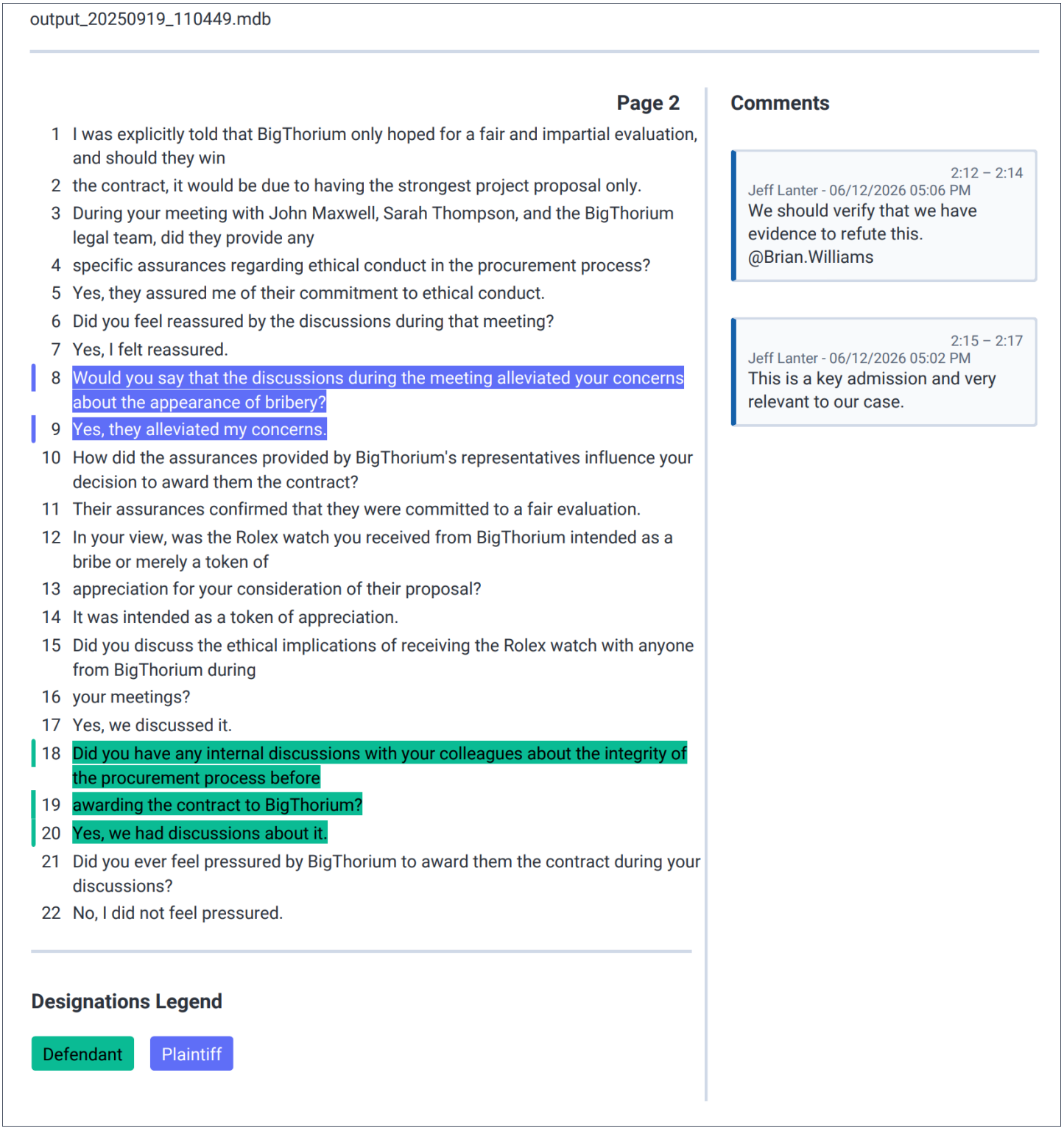
1. Do either of the following:
    - From the Documents tab:
        a. Navigate to the **Documents** tab and open an MDB transcript document.
        b. Click on the **Export** icon to expand the panel.



- From the Transcripts tab:
    a. Navigate to the **Transcripts** tab and select any transcripts from the list that you would like to include in the report.
    b. Click **Export**.
    The Export panel expands.

2. Select one of the following report Type options. Each report has different fields available so that you can tailor the report to your needs. You can click on the name of each report Type below to learn more about its fields.
    - **Transcript with Annotations**—Generate a report that includes the full transcript text and any desired type of annotation.
    - **Annotations**—Generate a report that only includes the selected types of annotations. The line in the transcript before and after the selected annotation types also displays in the report.
    - **Key Terms**—Generate a report that only includes sections of the transcript that match the entered key terms. The line in the transcript before and after the key term matches also displays in the report.
3. Complete the remaining fields for the report Type as desired.
4. Click **Export**.
   A PDF copy of the transcript report is downloaded to your workstation.

5.1.1.1 Transcript with Annotations



output_20250919_110449.mdb

Page 2

1 I was explicitly told that BigThorium only hoped for a fair and impartial evaluation, and should they win
2 the contract, it would be due to having the strongest project proposal only.
3 During your meeting with John Maxwell, Sarah Thompson, and the BigThorium legal team, did they provide any
4 specific assurances regarding ethical conduct in the procurement process?
5 Yes, they assured me of their commitment to ethical conduct.
6 Did you feel reassured by the discussions during that meeting?
7 Yes, I felt reassured.
8 Would you say that the discussions during the meeting alleviated your concerns about the appearance of bribery?
9 Yes, they alleviated my concerns.
10 How did the assurances provided by BigThorium's representatives influence your decision to award them the contract?
11 Their assurances confirmed that they were committed to a fair evaluation.
12 In your view, was the Rolex watch you received from BigThorium intended as a bribe or merely a token of
13 appreciation for your consideration of their proposal?
14 It was intended as a token of appreciation.
15 Did you discuss the ethical implications of receiving the Rolex watch with anyone from BigThorium during
16 your meetings?
17 Yes, we discussed it.
18 Did you have any internal discussions with your colleagues about the integrity of the procurement process before
19 awarding the contract to BigThorium?
20 Yes, we had discussions about it.
21 Did you ever feel pressured by BigThorium to award them the contract during your discussions?
22 No, I did not feel pressured.

Designations Legend

Defendant Plaintiff

Comments

2:12 – 2:14
Jeff Lanter - 06/12/2026 05:06 PM
We should verify that we have evidence to refute this. @Brian.Williams

2:15 – 2:17
Jeff Lanter - 06/12/2026 05:02 PM
This is a key admission and very relevant to our case.

This report contains the following fields:

- **Pages per sheet**—Select one of the following options to determine how the transcript displays in the report:
  - **1 Page**—One page of the transcript displays on a single page in the report. Optionally, you can include comments if you select this option.

    - **4 Pages**—Four pages of the transcript display on a single page in the report. Comments cannot be included in the report with this option selected.
- **Print with**—Optionally, you can select one of the following options to include the name of the workspace or the transcript in the report:
    - **All**—Select to display both the name of the workspace and the transcript file in the report.
    - **Workspace Name**—Select to display the name of the workspace where you generated the report.
    - **Transcript Name**—Select to display the name of the transcript file based on the File Name field.
- **Location**—These options only display if you select one of the **Print with** options. Select an option to determine the location of the Workspace Name or Transcript Name in the report.
    - **Header**—Select to include the Workspace Name or Transcript Name at the top of the report.
    - **Footer**—Select to include the Workspace Name or Transcript Name at the bottom of the report.
    - **Left**—Select to include the Workspace Name or Transcript Name on the left side of the report.
    - **Center**—Select to include the Workspace Name or Transcript Name in the center of the report.
    - **Right**—Select to include the Workspace Name or Transcript Name on the right side of the report.
- **Include**—Select one of the following options to determine if comments and designations display in the report:
    - **All**—This option is only available if you select **1 Page** for the Pages per sheet field. Select to include both comments and designations in the report.
    - **Comments**—This option is only available if you select **1 Page** for the Pages per sheet field. Select to display comments in the report.
    - **Designations**—Select to display designations in the report.
- **Designation Types**—This option only displays if **All** or **Designations** are selected for the Include option. By default, all designation types are included in the report.
  You can use this option to determine which types of designations display in the report. Click on the drop-down menu and select or deselect designation types as desired. Only the selected designation types will display in the report.
- **Legend**—This option only displays if **All** or **Designations** are selected for the Include option. Enable this option to display a legend that contains the designation type on each page that has one or more designations. If this option is disabled, the legend does not display in the report.

5.1.1.2 Annotations

Transcript Name: output_20250919_110449.mdb

Designation : Plaintiff

Page 2, Line 8–9

Transcript Text

2:7 Yes, I felt reassured.
8 Would you say that the discussions during the meeting alleviated your concerns about the appearance of bribery?
9 Yes, they alleviated my concerns.
10 How did the assurances provided by BigThorium's representatives influence your decision to award them the contract?

Comment

Page 2, Line 12–14

Transcript Text

2:11 Their assurances confirmed that they were committed to a fair evaluation.
12 In your view, was the Rolex watch you received from BigThorium intended as a bribe or merely a token of
13 appreciation for your consideration of their proposal?
14 It was intended as a token of appreciation.
15 Did you discuss the ethical implications of receiving the Rolex watch with anyone from BigThorium during

Comment

Jeff Lanter - 06/12/2026 05:06 PM
We should verify that we have evidence to refute this. @Brian.Williams

Comment

Page 2, Line 15–17

Transcript Text

2:14 It was intended as a token of appreciation.
15 Did you discuss the ethical implications of receiving the Rolex watch with anyone from BigThorium during
16 your meetings?
17 Yes, we discussed it.
18 Did you have any internal discussions with your colleagues about the integrity of the procurement process before

Comment

Jeff Lanter - 06/12/2026 05:02 PM
This is a key admission and very relevant to our case.

Designation : Defendant

Page 2, Line 18–20

Transcript Text

2:17 Yes, we discussed it.
18 Did you have any internal discussions with your colleagues about the integrity of the procurement process before
19 awarding the contract to BigThorium?
20 Yes, we had discussions about it.
21 Did you ever feel pressured by BigThorium to award them the contract during your discussions?

This report contains the following fields:

- **Include**—Select one of the following options to determine if comments, exhibit links, and designations display in the report:
  - **All**—Select to display comments, exhibit links, and designations in the report.
  - **Comments**—Select to display comments in the report.
  - **Exhibits**—Select to display exhibit links in the report.
  - **Designations**—Select to display designations in the report.
- **Designation Types**—This option only displays if **All** or **Designations** are selected for the Include option. You can use this option to determine which types of designations display in the report. Enable this option to display a legend that contains the designation type on each page that has one or more designations. If this option is disabled, the legend does not display in the report.
- **Include entire question & answer**—This option determines if the nearest question and answer are included in the annotation.
  - **Yes**—If selected, the nearest question and answer are included in the annotation. For this option to work, the transcript file should have the questions and answers marked with the letters Q and A. If your transcript file does not have questions and answers marked, consider using the Additional lines above & below option to provide more context in the report.
  - **No**—If selected, the nearest question and answer are not included in the annotation.
- **Additional lines above & below**—Click on the drop-down menu and select an option to determine how many rows above and below each comment, exhibit links, and designation display in the report. For example, if you select 2, there will be two lines above and below each comment, exhibit links, and designation in the report.

5.1.1.3 Key Terms

Transcript Name: output_20250919_110449.mdb

Key Term : sarah thompson

Page 1, Line 17–19

Transcript Text

1:17 Yes, I understand.
18 Can you describe the meeting you had with John Maxwell, Sarah Thompson, and the BigThorium legal team?
19 The meeting focused on BigThorium's commitment to ethics and fairness.

Key Term : bigthorium

Page 1, Line 17–20

Transcript Text

1:17 Yes, I understand.
18 Can you describe the meeting you had with John Maxwell, Sarah Thompson, and the BigThorium legal team?
19 The meeting focused on BigThorium's commitment to ethics and fairness.
20 John Maxwell and Sarah Thompson reiterated that the Rolex was only intended to be a 'token of appreciation'

Key Term : sarah thompson

Page 1, Line 19–21

Transcript Text

1:19 The meeting focused on BigThorium's commitment to ethics and fairness.
20 John Maxwell and Sarah Thompson reiterated that the Rolex was only intended to be a 'token of appreciation'
21 for being considered for the contract.

Key Term : bigthorium

Page 1, Line 21 – Page 2, Line 2

Transcript Text

1:21 for being considered for the contract.
22 How did the discussions during the meeting with BigThorium's legal team impact your decision to award the contract?

2:1 I was explicitly told that BigThorium only hoped for a fair and impartial evaluation, and should they win
2 the contract, it would be due to having the strongest project proposal only.

Key Term : sarah thompson

Page 2, Line 2–4

Transcript Text

2:2 the contract, it would be due to having the strongest project proposal only.
3 During your meeting with John Maxwell, Sarah Thompson, and the BigThorium legal team, did they provide any
4 specific assurances regarding ethical conduct in the procurement process?

Key Term : bigthorium

Page 2, Line 2–4

Transcript Text

2:2 the contract, it would be due to having the strongest project proposal only.
3 During your meeting with John Maxwell, Sarah Thompson, and the BigThorium legal team, did they provide any
4 specific assurances regarding ethical conduct in the procurement process?

This report contains the following fields:

- **Include entire question & answer**—This option determines if the nearest question and answer are included in the annotation.
    - **Yes**—If selected, the nearest question and answer are included in the annotation. For this option to work, the transcript file should have the questions and answers marked with the letters Q and A. If your transcript file does not have questions and answers marked, consider using the Additional lines above & below option to provide more context in the report.
    - **No**—If selected, the nearest question and answer are not included in the annotation.
- **Additional lines above & below**—Click on the drop-down menu and select an option to determine how many rows above and below each key term match in the report. For example, if you select 2, there will be two lines above and below each key term match in the report.
- **Key Terms**—enter the exact terms you would like to search for in the transcript document and highlight in the report and press **Enter** on your keyboard. Enter each term on its own separate line. Wildcards are not supported.

5.2 Transcripts application

5.2.1 Creating a transcript report

To create a transcript report:

1. Navigate to the **Documents** tab.
2. Select one or more transcript documents to report on.
3. Click the mass operations button and select **Transcript Report**. A pop-up appears.
4. Select one of the following report types:
    - Annotations Digest
    - Key Terms
5. Complete the remaining applicable fields.
6. Select **Export.**

5.2.2 Annotations Digest

The Annotations Digest report exports a PDF with the selected annotations that contains the following information:

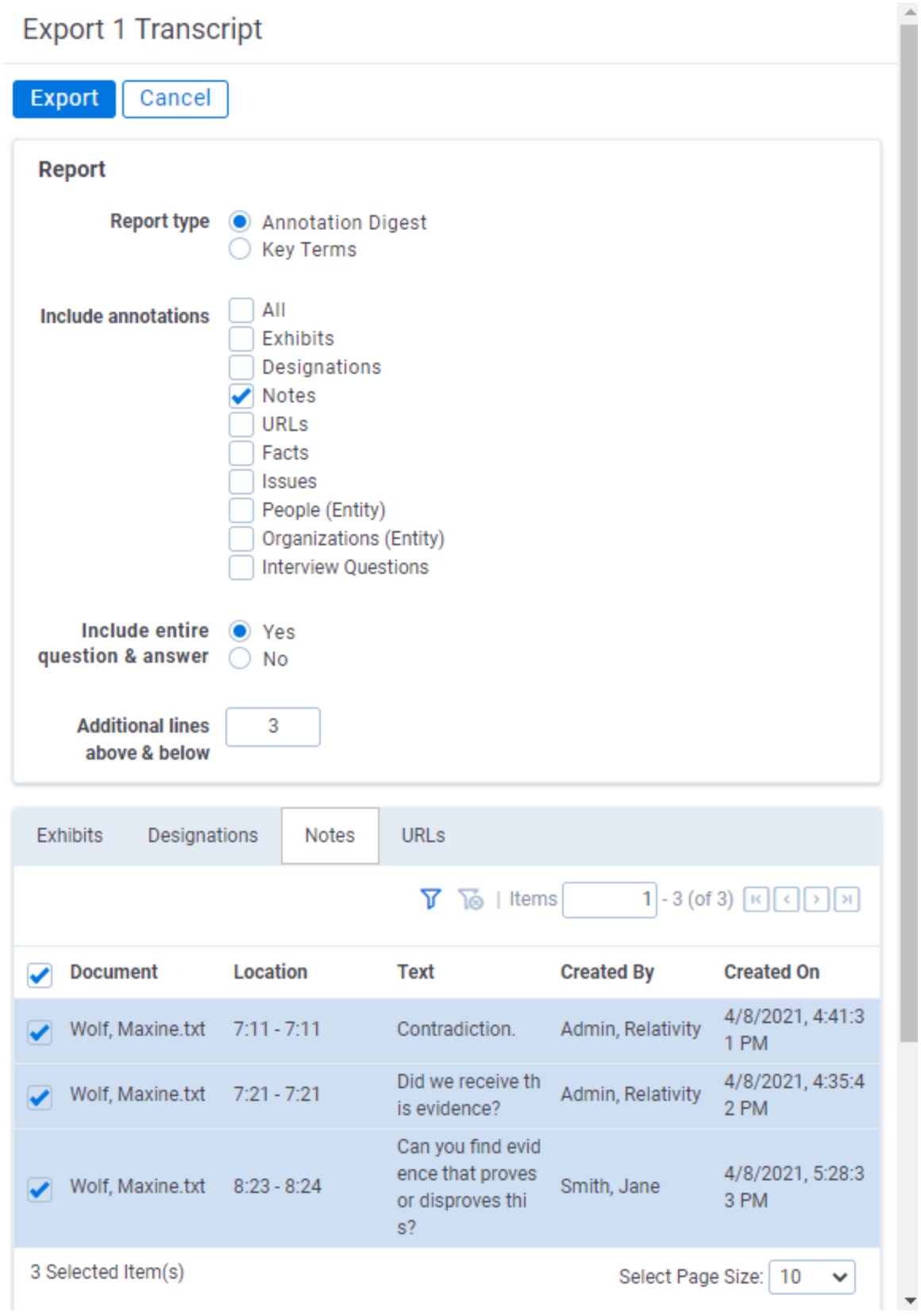
- Case Name
- Transcript Name
- Type of annotation with total number of annotations selected
- Individual representations of each annotation with corresponding page and line numbers
- Case Dynamics items
- Time and date of digest generation

To run the Annotations Digest, fill out the following fields:

- **Include All Annotations** - select all or which annotation types and Case Dynamics items you would like to include. In the bottom section of the report pop-up, you can choose to include or exclude specific annotations.

  Note: Comments within notes are included when you select Notes, so you can see the full dialogue on printed transcripts.

- **Include Entire Question and Answer** - select Yes/No to include the nearest question and answer in the selected annotation.



5.2.3 Key Terms

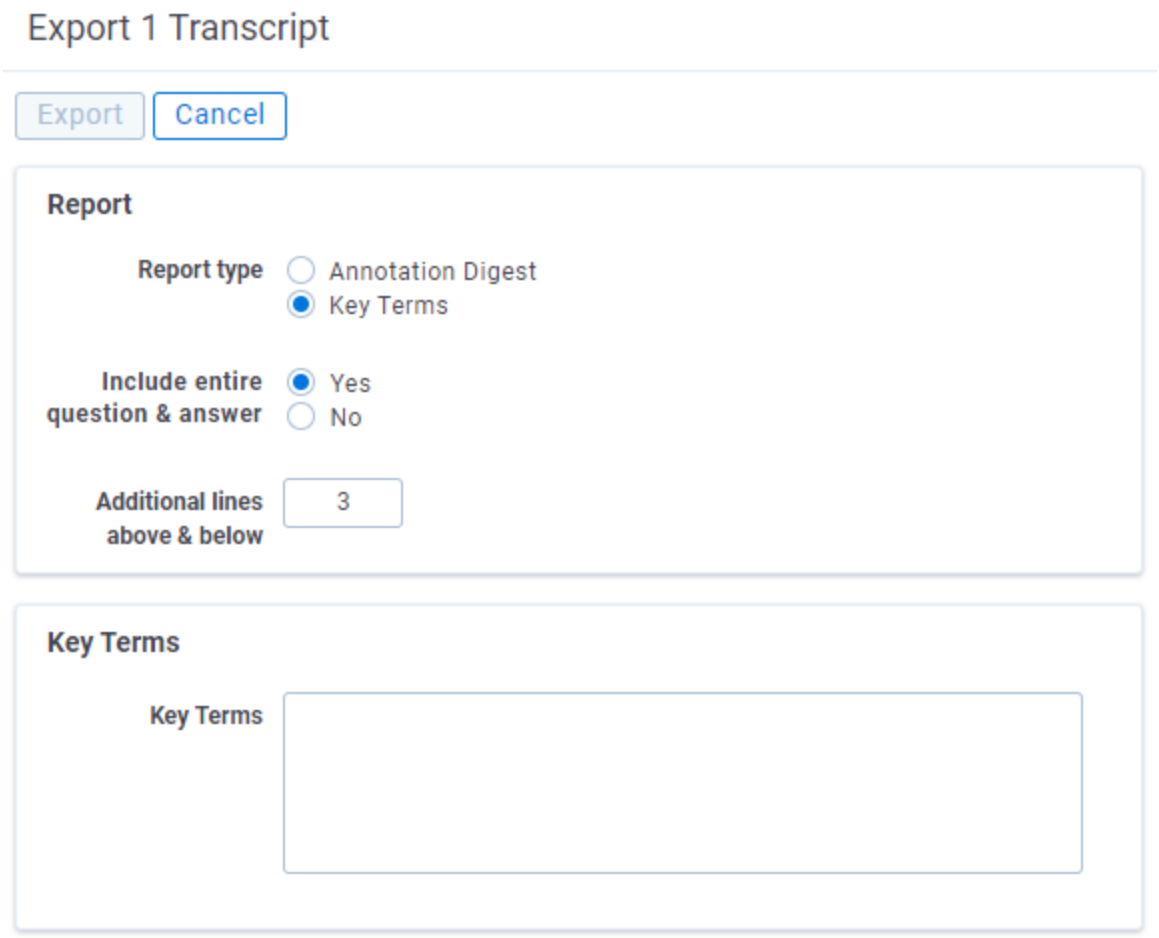
The Key Terms report exports a PDF with the chosen key terms that contains the following information:

- Case Name
- Transcript Name
- List of key terms
- Individual representations of each key term with corresponding page and line numbers, including the additional lines above and below the term
- Time and date of digest creation

Key terms are highlighted in the report.

To run the Key Terms report, fill out the following fields:

- **Include Entire Question and Answer** - select Yes/No to include the nearest question and answer in the selected annotation.
- **Additional Lines Above & Below** - enter up to 10 additional lines that you would like to include above and below the line where the term is located.
- **Key Terms** - enter the key terms you would like to run the report on, with each term on a separate line.



5.2.4 Printing from the Viewer

To print transcripts from the Viewer:

1. Open a .ptf, .xmptf, .rtf, .trn, .lef, .xmef, or .txt document in the Viewer.
2. Click on the **Print/Save As PDF** icon in the Viewer toolbar.

3. Complete the following fields as desired:
    - **Pages per sheet**—Select to print transcript pages as one page per sheet or select condensed printing to print four pages to a sheet.
    - **Branding**—Select to include branding as a Center Header, Center Footer, or select None for no branding.
    - **Include**—Select to include the Workspace Name, Transcript Name, Deposition Date, Deponent Name, and/or Page Numbers.
    - **Print with**—Select any of the following to include them in the print out:
        - **Designations**—Designations will only display if you select to print transcripts as one page per sheet.
        - **Notes**—Notes will only display if you select to print transcripts as one page per sheet. If Notes is selected, comments within notes are included so you can see the full dialogue on printed transcripts.
        - **Legends**—Select this option to include a designation cover page and legend to help you understand the designations included in the printed transcript. The designation legend is displayed at the bottom-right of the transcript page. If there is more content than can be displayed in a single page, the extra designation legend content will display on a second page.
4. Select **Print Transcript**.

6 Transcript supported file types

Relativity.Transcripts supports MDB transcript files.

The Transcripts application supports a number of file types and each one is described below.

These sections detail the load file requirements for the respective file types.

6.1 Supported file types

The following file type is supported by the Relativity.Transcripts application:

- MDB transcript files

The following file types are supported by the Transcripts application:

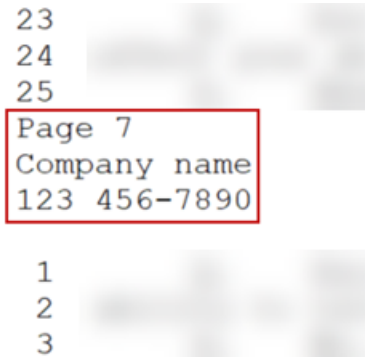
- .ptf
- .xmptf
- .rtf
- .trn
- .lef
- .xmef
- .txt
- .mp4

6.2 Transcripts application

6.2.1 Special considerations

Special considerations include:

- Import/Export only supports these transcript file types: .ptf, .xmptf, .rtf, .txt, .trn, and .lef.
- The Transcripts applications supports UTF-8 encoding. UTF-8 BOM is not supported.
- The Transcripts application does not support transcript files that contain footers. For example, the .txt transcript file below is not supported because it contains a footer.



See Uploading transcripts.

- The Transcripts application does not support Transcript files that contain a word index before they are uploaded to Relativity. For example, the .txt transcript file below is not supported because it contains a word index.

```
allegations 80:17
83:25 199:13,23
201:5 244:3
allege 199:1
alleged 79:5,14
80:18,24,25 81:6,7
82:1,8,13,24
[6 - alleged]
```

See Searching transcripts and Uploading transcripts.

6.2.2 Transcripts sync to video

MDB transcript files that are synced to multiple videos are only compatible with Relativity.Transcripts. You can use the Relativity.Transcripts import workflow to upload and review it.

The Transcripts application only supports transcript files synced to a single video.

Note: The Transcripts application supports transcript files up to 10GB. The upload can be a mix of transcript files, exhibits, and video files.

The Transcripts application supports the following syncing method:

- **TimeCoder Pro syncing, using their Export to ASCII Format** - The transcripts application supports video synced transcripts through TimeCoder Pro. You should provide the following specifications to the Transcripts vendor so that the files you receive can easily be imported into the Relativity Transcripts application. From

TimeCoder Pro, the Transcript text file should be exported selecting the export to ASCII format with the additional option of export with time codes selected. When exporting with time codes, you can select to include seconds and milliseconds. If the time codes are not included in the text file export, the Transcripts application will not have the data necessary to play the synchronized transcript. To import your synced transcript, you will first select the .txt file you want to upload and then select the single .MP4 video file and any exhibits that you would like to link to your transcript.

```
00:00:09.250  00004:01        THE VIDEOGRAPHER:  Good afternoon.  We are
00:00:10.740          02  going on the video record at 1:47 p.m.  Today's date
00:00:15.240          03  is September 5th, 2019.  This begins Media Unit 1 in
00:00:20.250          04  the video recorded deposition of Maxine Wolf taken on
00:00:23.210          05  behalf of the plaintiffs in the case matter of
00:00:28.790          06  Cerdito, et al., versus Wolf Development filed in the
00:00:31.290          07  United States District Court for the District of New
00:00:34.561          08  Jersey.
00:00:34.880          09                  This deposition is being held at the
00:00:36.500          10  law offices of Halliwell and Phillips located in
00:00:40.310          11  Hammington, New Jersey.
00:00:42.930          12                  My name is Kevin Duncan, and I am a
00:00:44.580          13  certified legal video specialist from the firm of
00:00:47.250          14  Veritext Legal Solutions.  The court reporter today
00:00:49.750          15  is Ms. Theresa Lazzaro from the firm of Veritext
00:00:53.040          16  Legal Solutions.
00:00:54.213          17                  Will the court reporter please
00:00:55.494          18  administer the oath?
00:00:58.338          19                       (WHEREUPON, the witness was
00:01:01.181          20                        duly sworn.)
00:01:04.025          21        THE VIDEOGRAPHER:  You may proceed.
00:01:04.506          22
```

6.2.2.1 .txt files

Transcripts application completes a header validation for .txt files. You can use the following as an example of a .txt file: .

The first five lines of a text file need to be one of the three options below:

- number space text

```
1  0233
2  1                UNITED STATES DISTRICT COURT
3  2                SOUTHER DISTRICT OF CALIFORNIA
4  3
5  4   CROSSFIT, INC., a Delaware
```

- number symbol space text

```
1  0=
2  1=                                Court N$ : T-1439-02
3  2=
4  3=
5  4=
```

- space number space text

```
1  Johnson, Frank - Vol. I
2  page 1
3
4   1
5   2       SUPERIOR COURT OF THE STATE OF CALIFORNIA
```

6.2.3 Transcripts with hyperlinked exhibits

6.2.3.1 .lef files

Transcripts application supports .lef files that are a zip file and contain any of the following files:

- .ptf
- .xmptf
- .txt

.lef files that are password protected are not supported.

6.2.4 Text transcript file types

6.2.4.1 .ptf files

.ptf files will normally have the same file format that includes the following three lines:

- begin=Head
- type=ptf
- begin=Text

```
begin=Head
type=ptf
version=1.3
end=Head
begin=CaseInfo
path=C:\Users\Public\Documents\Westlaw Case Notebook\Cases\_DEMO35_.pxl
name=Gil Bower v. DC Corporation
end=CaseInfo
begin=TranscriptInfo
datetime=2007 12 10 08 30 00
name=Evans, Walter
begin=DocLevelIssues
end=DocLevelIssues
begin=comments
end=comments
pagenames=1,2,3,4,5,6,7,8,9,10,11,12,13,14,15,16,17,18,19,20,21,22,23,24,25,
linenames=1,2,3,4,5,6,7,8,9,10,11,12,13,14,15,16,17,18,19,20,21,1,2,3,4,5,6,
linetimestamps=,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
firstpage=1
pagelen=25
end=TranscriptInfo
begin=ActiveIssues
begin=IssueNumbering
12=4.0
end=IssueNumbering
begin=IssueColor
12=#FD553E
end=IssueColor
12=Impeachment by plaintiff
end=ActiveIssues
begin=DeletedIssues
end=DeletedIssues
begin=Annotations
begin=anno
pos=555 0 558 22
issues=12
begin=note
0=
1=
2=              Plaintiff may try to portray Parker as deceptive or incompeten
3=
4=
end=note
end=anno
end=Annotations
begin=Text
0=             IN THE UNITED STATES DISTRICT COURT
1=           FOR THE NORTHERN DISTRICT OF CALIFORINIA
2=GIL R. BOWER   ,                            | CASE NO. 3:05-CV-90991
3=                                            |
```

6.2.4.2 .xmptf files

.Xmptf files will normally have the same file format that includes the following three lines:

- begin=Head
- type=ptf
- begin=Text

To differentiate from .ptf files, these also contain the following lines:

- linesnames=
- linetimestamps=

```
begin=Head
type=ptf
version=1.3
end=Head
begin=CaseInfo
path=
name=
end=CaseInfo
begin=TranscriptInfo
datetime=
name=
guid=38a3410090872a4a4972378f39d69b283d92f464
fp=f8e70e8c7cf5f737f8993205958088c4fad9c249
depolines=0
restartid=
pagenames=1,2,3
linenames=1,2,3,4,5,6,7,8,9,10,11,12,13,14,15,16,17,18,19,20,21,22,2
linetimestamps=,,11:17:22,11:17:22,11:17:22,11:17:23,11:17:27,11:17:
firstpage=1
pagelen=25
end=TranscriptInfo
begin=ActiveIssues
end=ActiveIssues
begin=DeletedIssues
end=DeletedIssues
begin=IssueColors
end=IssueColors
begin=Annotations
end=Annotations
begin=Text
0=                                    JOHN DOOLEY,
1=having first been duly sworn, testified as follows:
2=                                  DIRECT EXAMINATION
```

6.2.4.3 .rtf files

With .rtf files, all transcripts must contain one of the following headers:

- \rtf1\ansi\ansicpg1252\uc1\deff0\stshfdbch0\stshfloch0\stshfhich0\stshfbi0\deflang1033\deflangfe1033
  - Transcript lines start on \fs22.

```
{\rtf1\ansi\ansicpg1252\uc1\deff0\stshfdbch0\stshfloch0\stshfhich0\stshfbi0\deflang1033\deflangfe1033

{\fonttbl{\f0\froman\fcharset0\fprq2 Times New Roman;}

{\f2\fmodern\fcharset0\fprq1 Courier New;}}

{\colortbl;\red0\green0\blue0;\red255\green255\blue255}

{\stylesheet

{\ql \li0\ri0\widctlpar\aspalpha\aspnum\faauto\adjustright\rin0\lin0\itap0 \f2\fs22\lang1033

\langfe1033\cgrid\langnp1033\langfenp1033 \snext0 Normal;}

{\*\cs10 \additive \ssemihidden Default Paragraph Font;}

{\*\cs16 \additive \sbasedon10 page number;}{\*\cs17 \additive \sbasedon10 line number;}}

{\*\generator Reallegal E-Transcript Manager;}{\info}

\sectd \psz1\pgnrestart\pgnstart1\linemod1\linex0\sectdefaultcl\sftnbj \marg4800\marg4800

{\header \pard\plain \s15\ql \li0\ri0\widctlpar\tqc\tx4320\tqr\tx8640\pvpara\phmrg\posxr\posy0

\aspalpha\aspnum\faauto\adjustright\rin0\lin0\itap0

\f2\fs22\lang1033\langfe1033\cgrid\langnp1033\langfenp1033

{\field{\*\fldinst {\cs16 PAGE  }}{\fldrslt {\cs16\lang1024\langfe1024\noproof 9708}}}

{\cs16\par }\pard \s15\ql \li0\ri360\widctlpar\tqc\tx4320\tqr\tx8640\aspalpha\aspnum\faauto\adjustright\rin360\lin0\itap0 {

\par }}{\*\pnseclvl1\pnucrm\pnstart1\pnindent720\pnhang {\pntxta .}}{\*\pnseclvl2\pnucltr\pnstart1\pnindent720\pnhang {\pntxta .}}{\*\pnseclvl3\pndec\pnsta

{\*\pnseclvl5\pndec\pnstart1\pnindent720\pnhang {\pntxtb ({\pntxta )}}}{\*\pnseclvl6\pnlcltr\pnstart1\pnindent720\pnhang {\pntxtb ({\pntxta )}}}{\*\pnseclv

\pnlcltr\pnstart1\pnindent720\pnhang {\pntxtb ({\pntxta )}}{\*\pnseclvl9\pnlcrm\pnstart1\pnindent720\pnhang {\pntxtb ({\pntxta )}}\pard\plain \ql \li0\ri

\pard\plain \ql \li0\ri0\sl480\slmult1\nowidctlpar\faauto\rin0\lin0\itap0\f2\fs22\lang1033\langfe1033\cgrid\langnp1033\langfenp1033{\pard\plain \ql \li0\ri

\pard\plain \ql \li0\ri0\sl480\slmult1\linemod1\f2\fs22  Ms. Clark:  Thank you.\par

\pard\plain \ql \li0\ri0\sl480\slmult1\linemod1\f2\fs22       At this time, Madame Foreman, I would like to call Mr.\par

\pard\plain \ql \li0\ri0\sl480\slmult1\linemod1\f2\fs22       Brian Kaelin to the witness stand. \par

\pard\plain \ql \li0\ri0\sl480\slmult1\linemod1\f2\fs22  The Foreperson:  Brian Kaelin, please raise your right hand.\par

\pard\plain \ql \li0\ri0\sl480\slmult1\linemod1\f2\fs22       You do solemnly swear the testimony you are about to\par
```

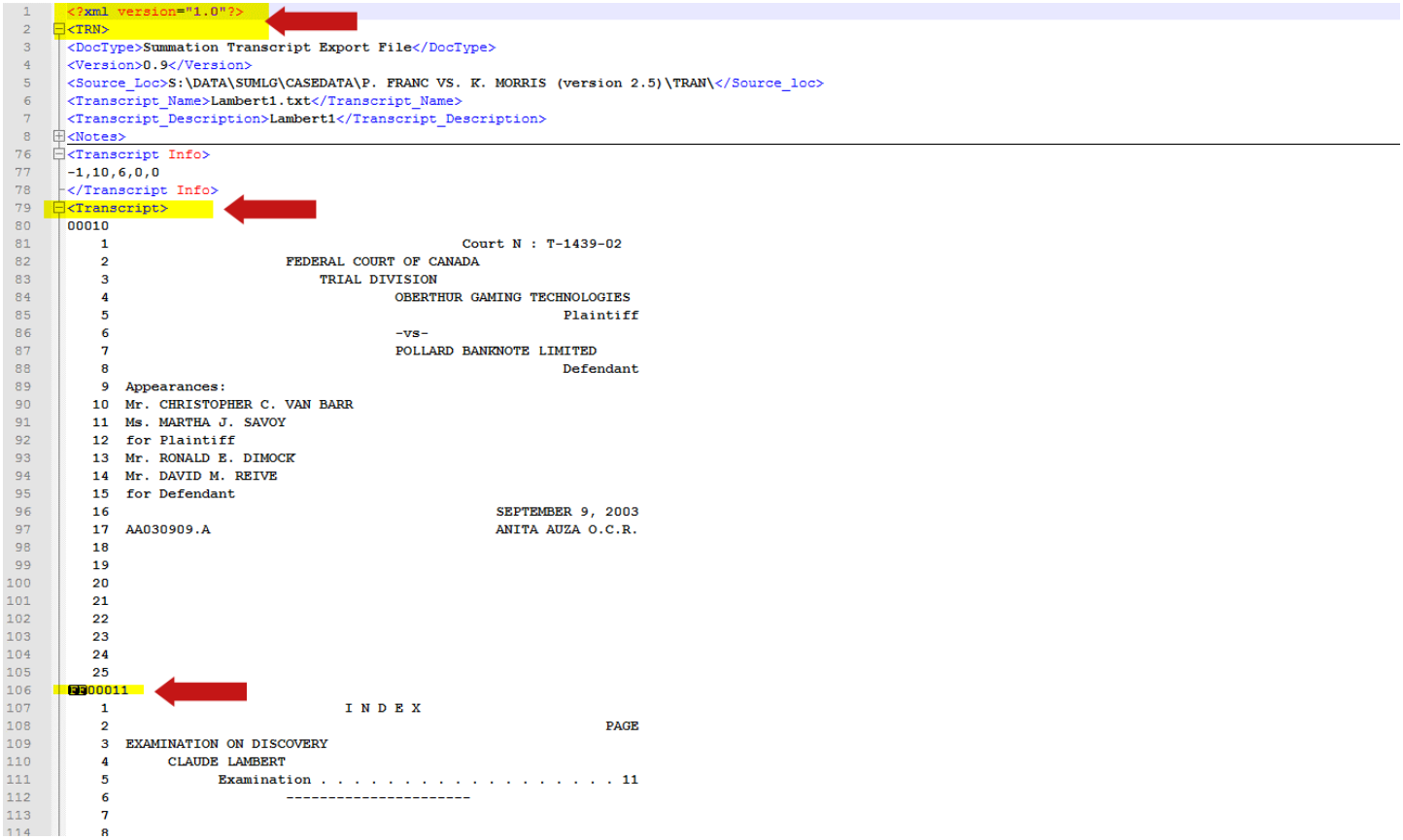
- \rtf1\ansi\ansicpg1252\deff0\deflang1033
    - Transcript lines end on \line.

```
{\rtf1\ansi\ansicpg1252\deff0\deflang1033
{\fonttbl{\f0\fmodern\fprq1\fcharset0 Courier New;}}
{\header
\viewkind4\uc1\pard\f0\fs20\qc

}
{\footer
\viewkind4\uc1\pard\f0\fs20\qc

}
\margl200\margr200\margt200\margb200
\viewkind4\uc1\pard\f0\fs20\sl495
000001\par
      01     IN THE SUPERIOR COURT OF THE STATE OF CALIFORNIA\line
      02           IN AND FOR THE COUNTY OF SANTA CLARA\line
      03                        ---o0o---\line
      04  PETER FRANC,\line
      05             Plaintiff,\line
      06                                    No. CV772727\line
      07       vs.\line
      08  \line
      09  KELLY MORRIS; JAMIE MORRIS;\line
      10  VIKING CONSTRUCTION; STEVENS\line
      11  GEOTECHNICAL,INC.; ROGER\line
```

6.2.4.4 .trn files

Transcripts application supports .trn files that adhere to the following requirements:

- Start with an XML element
- Contain a <TRN> element.
- Contain a <Transcript> element.
- Contain a control character for line page divider.



6.2.4.5 .xmef files

Transcripts application supports .xmef files that are zip file and contain any of the following files:

- .ptf
- .xmptf
- .txt

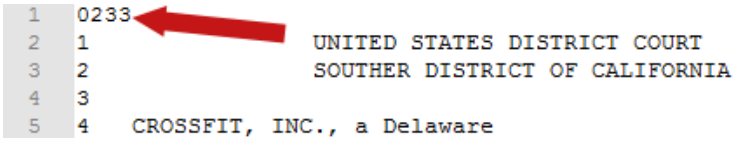
Note: .xmef files that are password protected are not supported.

6.2.4.6 .txt files

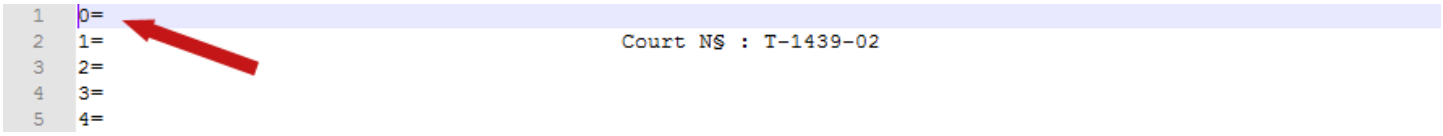
Transcripts application completes a header validation for .txt files. You can use the following as an example of a .txt file: MaxineWolf_Deposition_Text.txt.

The first five lines of a text file need to be one of the three options below:

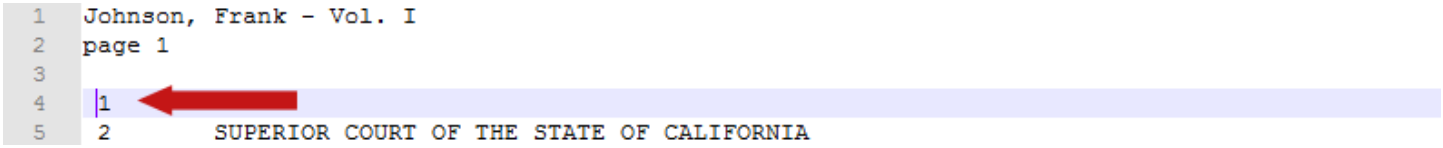
- number space text



- number symbol space text



- space number space text



7 Transcript video clips

With the Transcripts application, you can create and export video clips in .css, for use in TrialDirector, or .csv file formats. Exporting in .mp4 format is not available at this time.

7.1 Transcripts application

7.1.1 View video clips

To see a list of all the video clips in a workspace, navigate to the **Video Clips** tab.

To see a list of video clips for a particular transcript:

1. Open the transcript in the Viewer.
2. Select the **Transcripts** layout.
3. Click the **Video Clips** tab.

To open a particular video clip in the Video Clipping pane, click on the Video Clip Name of a video clip. The video clip opens in view mode. In view mode, text from the transcript that is not part of the video clip turns gray. You can still annotate gray text.

7.1.2 Create a video clip

From the Viewer, you can create video clips. Methods include:

- Create a video clip by highlighting text below
- Create a video clip from a preexisting designation on the next page
- Create a video clip while the video is playing in the Viewer on the next page

7.1.2.1 Create a video clip by highlighting text

To create a video clip by highlighting text:

1. Open a transcript with a video in the Viewer.
2. Highlight the text that you want in the video clip.
3. Right click with your mouse. A context menu opens.
4. Click **Create Video Clip**. The Video Clipping pane opens.
5. (Optional) Edit the video clip in the Video Clipping pane. Once you save a video clip, you can only edit the Video

Clip Name and Video Clip description fields. See Edit a video clip below.

6. Click **Save Video Clip**.

7.1.2.2 Create a video clip from a preexisting designation

To create a video clip from a preexisting designation:

1. Open a transcript with a video in the Viewer.
2. Right click on a preexisting designation that you want to turn into a video clip. A context menu opens.
3. Click **Create Video Clip**. The Video Clipping pane opens.
4. (Optional) Edit the video clip in the Video Clipping pane. Once you save a video clip, you can only edit the Video Clip Name and Video Clip description fields. See Edit a video clip below.
5. Click **Save Video Clip**.

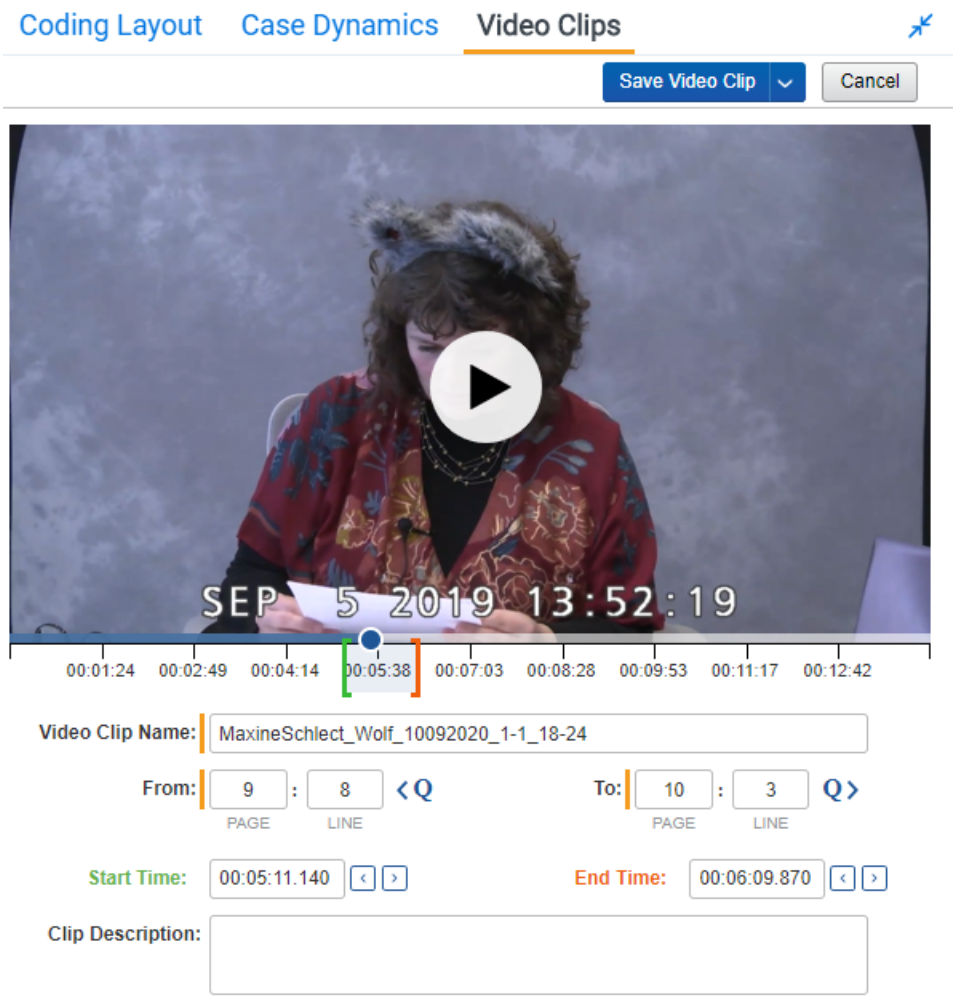
7.1.2.3 Create a video clip while the video is playing in the Viewer

To create a video clip while the video is playing in the Viewer:

1. Open a transcript with a video in the Viewer.
2. Click **Video Sync** icon to open the video player in the Viewer. The video transcripts starts playing.
3. Click the **New Video Clip** button when the video reaches the spot where you want your video clip to start. The Video Clipping pane opens. Relativity marks the **To** field as the last page:line number of the Transcript.
4. (Optional) Edit the video clip in the Video Clipping pane. Once you save a video clip, you can only edit the Video Clip Name and Video Clip description fields. See Edit a video clip below.
5. Click **Save Video Clip**.

7.1.3 Edit a video clip

Before you save a new video clip, you can edit it in the Video Clipping pane.



The Video Clipping pane contains these editable features and fields:

- **Video** and **Video clip bar** - a video of the transcript with a bar that allows you to dynamically adjust the video clip position and duration. When you click play on the video, only the clipped portion of the video will play, and a blue dot shows where in the clip you are. In addition to the blue dot, the Video clip bar contains two brackets. The green bracket shows where the video clip starts, and the red bracket shows where it ends. Only the video contained within the brackets will be part of the video clip when you save it. You can move both brackets to edit the video clip as well as move the blue dot to dynamically seek any time position within the brackets. To make it clear where the video clip ends, the blue dot snaps back to the red bracket automatically when you drag the blue dot beyond the red bracket on the time stamp bar.
- **Video Clip Name** - the name of the video clip. When you create a new video clip, Relativity automatically generates this field. The default naming convention is [Deponent's name]_[Today's date]_[the first line number of the video clip]_[the final line number of the video clip]. As long as the Video Clip Name is unique, you can edit the field. An error message will display if the Video Clip Name already exists.
- **From** - denotes the starting page and line number of the video clip. You can manually edit both the page and line number. To move the page and line number to where the previous question starts, click the **Include Previous Question** icon. If the icon is grayed out, there isn't a previous question in the file.
- **To** - denotes the last page and line number of the video clip. You can manually edit both the page and line number. To move the page and line number to the following question, click the **Include Next Question** icon. If the icon is grayed out, there isn't another question in the file.

- **Start Time** - denotes the time at which the video clip starts. You can manually edit the this field. You can also click the **Backward** icon or the **Forward** icon to move the start time to the previous or next time stamp.
- **End Time** - denotes the time at which the video clip ends. You can manually edit the this field. You can also click the **Backward** icon or the **Forward** icon to move the end time to the previous or next time stamp.
- **Clip Description** - a space for you to enter a description of the video clip.

All of the fields in the Video Clipping pane are synchronized. For example, if you change the Start Time of the video clip, the green bracket on the time stamp bar and the From field adjust to reflect the new time. The text in the Viewer also adjusts to reflect the change. On the Transcript in the Viewer, black text is included in the video clip while gray text is not part of the video clip. You can still annotate gray text in the Viewer.

If you enter an invalid entry in a Video Clipping pane field, an error message displays above the video. Once you resolve the error, the error message goes away.

7.1.3.1 Edit a saved video clip

Once you save a video clip, you can only edit the **Video Clip Name** and **Clip Description** fields. If you need a saved video clip to be longer or shorter, delete the saved video clip and create a new video clip.

There are two ways to edit the Video Clip Name and Clip Description fields:

- From the Video Clips Pane, open the video clip that you want to edit in view mode and click **Edit**. After editing the fields, click **Save**.
- From the Video Clips tab, click on the Video Clip Name of the video that you want to edit. The Transcript Video Clip layout opens. Click **Edit**. After editing the fields, click **Save**.

7.1.4 Export a video clip in .css or .csv

Note: Exporting in .mp4 format is not available at this time.

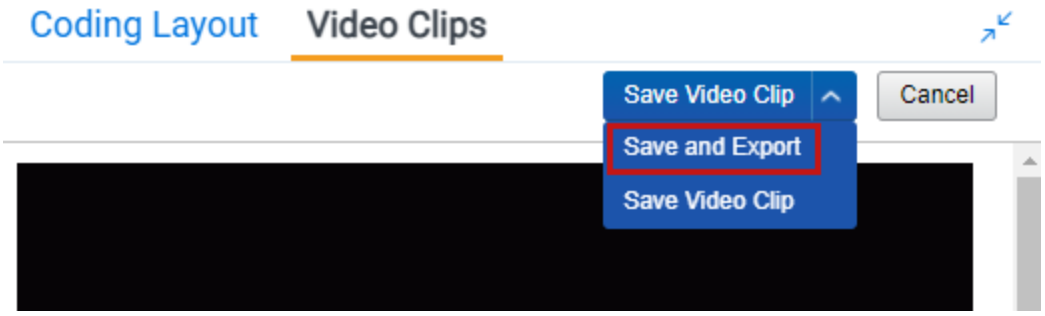
You can export a video clip three ways:

- Save and export a video clip below
- Merge and export video clips on the next page
- Export video clips on the next page

7.1.4.1 Save and export a video clip

To save and export a video clip once you're done editing it:

1. In the Video Clips card, click the drop-down arrow on the save menu and select **Save and Export**. The Save and Export Video Clip modal displays.



2. Select a **Video Clip Format**. Options include .csv and .ccs.
3. Click **Save and Export Video Clip**.

7.1.4.2 Merge and export video clips

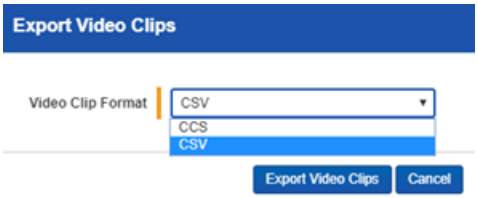
To reorder and export video clips from the same transcript:

1. In the Video pane, click **All Video Clips**.
2. Select the video clips that you want to merge and export.
3. Click **Merge and Export** from the mass operations bar. The Merge and Export Video Clips pop-up opens.
4. Modify the fields on the Merge and Export Video Clips window as needed.
    - **Merge Video Name** - the name of the file you will export.
    - **Video Clip Format** - options include .csv and .ccs.
    - **Clip Order** - the order the video clips are listed. To reorder the clips, you can drag and drop the clips. To remove a clip from the merge and export, hover over the clip video clip you want to remove with your mouse and then click the **Delete** icon when it appears.
5. Click **Merge and Export Video Clips**.

7.1.4.3 Export video clips

To export video clips from the same transcript:

1. Open the Video Clips card.
2. Select the video clips that you want to export.
3. Select **Export Video Clips** from the mass operations bar. The Export Video Clips modal displays.



4. Select a **Video Clip Format**. Options include .csv and .ccs.
5. Click **Export Video Clips**.

7.1.4.4 Export fields

Export fields include:

- **Control Number** - the control number of the transcript file that the video clip is from.
- **Video Clip Name** - the name of the video clip.
- **Location From** - the page and line number at which the video clip starts.
- **Location To** - the page and line number at which the video clip ends.
- **Start Time** - the time at which the video clip starts.
- **End Time** - the time at which the video clip ends.
- **Clip Length** - the length of the video clip.

- **Clip Transcript Text** - the transcript text from the video clip.
- **Clip Description** - a description of the video clip.

8 Transcript Summary

You can create a summary of a transcript using Generative AI to quickly find relevant information for your case. Once a Transcript Summary has been created, it can be viewed in the Viewer or if you have Case Strategy installed, you can also view a more detailed summary on the Case Home tab.

Summaries are supported for MDB transcripts with the Relativity.Transcripts application and summaries of ptf, .xmptf, .rtf, .trn, .lef, .xmef, .txt transcripts are supported with the installation of the Transcripts application.

Note: If you are trying to create a summary for a ptf, .xmptf, .rtf, .trn, .lef, .xmef, or .txt file that was not brought into Relativity using Simple File Upload, we recommend opening that file in the Viewer first so that it is converted to a file type that can be summarized. Then you can create a summary of the transcript using the instructions below.

8.1 Before you begin

- We recommend installing Case Strategy to maximize the functionality of the Relativity.Transcripts application.
- Import/Export utilizes Processing to capture transcript metadata, create a transcript document, link the attached audio/video files, and publish the transcript family to the workspace for MDB files. The Viewer utilizes the Family Group field in order to properly display the transcript alongside the audio/video content. Please ensure that the Family Group field is mapped to your workspace before Publish commences.

8.1.1 Permission

Each user can view transcript summaries regardless of permissions.

To create, cancel, or clear a transcript summary, a user must have the Add permission. To edit a Transcript Summary on the Case Home tab, a user must have the Edit permission.

Object Security
• **Case Strategy Case Document** - View, Edit, Add

8.1.2 Relativity.Transcripts billing and usage

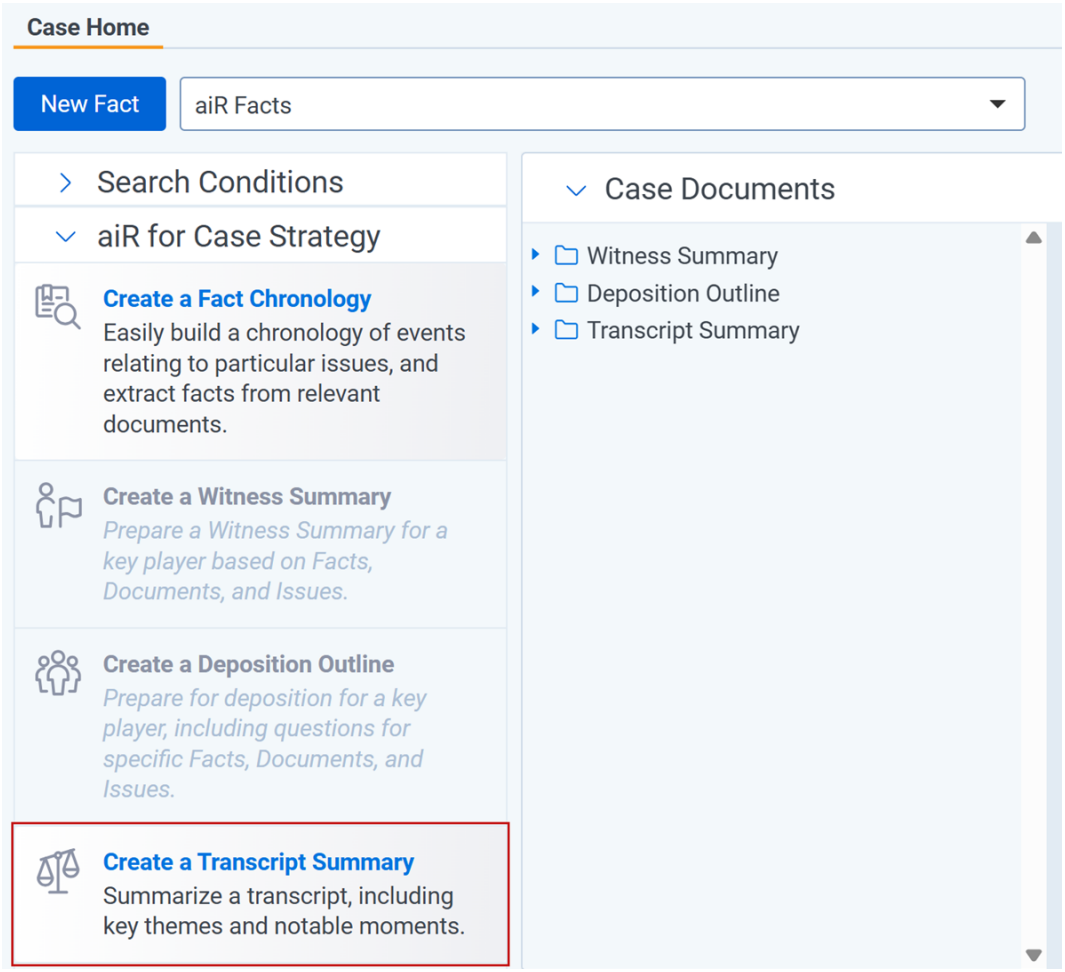
A workspace fee is charged when you run the first successful Fact Chronology job using Case Strategy or Transcript Summary job. To learn more about Transcript Summary, see Transcript Summary. You receive a quota of documents, and after exceeding that quota, billing transitions to a per-document rate. The workspace fee also provides 150 GB of .mp4 deposition video hosting and unlimited witness summaries and deposition outlines. Any video storage beyond the 150 GB is charged at your contractual Review rate.

8.2 Creating a Transcript Summary

You can create a Transcript Summary from the Case Home tab. This method of summary creation is compatible with the most transcript file formats. Alternatively, you can also create a Transcript Summary from the Viewer, depending on the document's file format.

To create a summary of a transcript document from the Case Home tab:

1. Navigate to the **Case Home** tab.
2. On the Case Strategy panel, click **Create a Transcript Summary**.

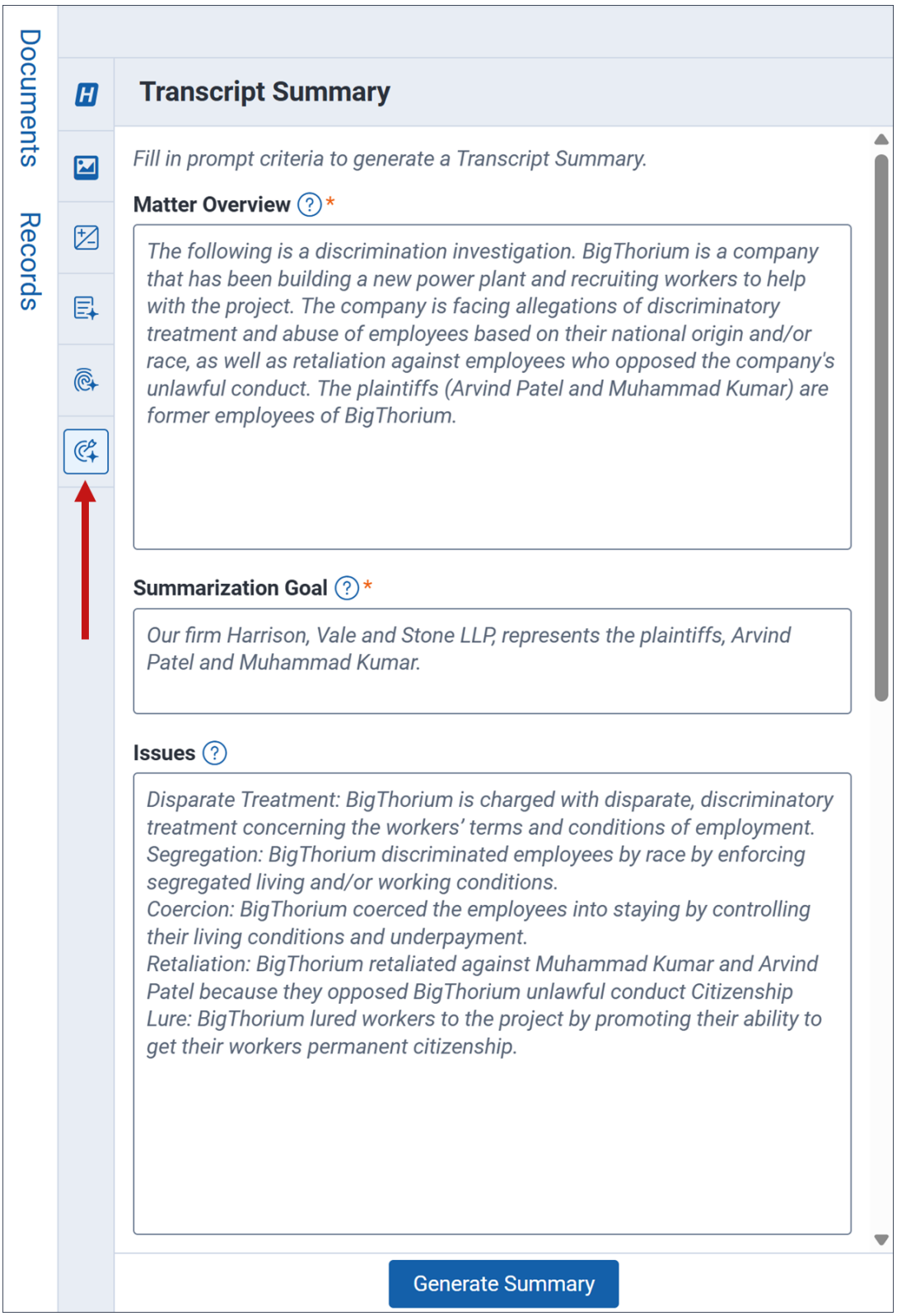


3. Click on the **Transcript Document** field and select the desired document from the drop-down menu.
4. Complete the remaining prompt criteria to determine how the summary is generated. The Matter Overview and Summarization Goal fields are required. In most cases, the more prompt criteria you can complete, the better the results are. To learn more about the prompt criteria, see Transcript Summary prompt criteria.
5. Click **Generate Summary**.
   The Transcript Summary job begins. Once the job is complete, an email is sent to the user that started Transcript Summary job.

   Note: You can monitor the progress of a Transcript Summary job by opening the document that is being summarized in the Viewer and expanding the Transcripts Summary Panel.

To create a summary of a transcript document from the Viewer:

1. Navigate to the **Documents** tab.
2. Select a transcripts document from the list.
   The transcripts document opens in the Viewer.
3. Click on the **Transcripts Summary** icon to expand the panel.



4. Complete the prompt criteria to determine how the summary is generated. The Matter Overview and Summarization Goal fields are required. In most cases, the more prompt criteria you can complete, the better the results are. To learn more about the prompt criteria, see Transcript Summary prompt criteria.
5. Click **Generate Summary**.
   The Transcript Summary job begins. Once the job is complete, an email is sent to the user that started Transcript Summary job.

Note: You can monitor the progress of a Transcript Summary job by opening the document that is being summarized in the Viewer and expanding the Transcripts Summary Panel.

8.3 Viewing a Transcript Summary

There are two ways to view a Transcript Summary. You can view a Transcript Summary from the Viewer to conveniently review the summary or if you have Case Strategy installed, you can view it from the Case Home tab and if desired, edit the summary.

Note: If a Transcript Summary was previously edited on the Case Home tab, the edited summary only displays on that tab and not in the Viewer.

To view a Transcript Summary from the Viewer:

1. Navigate to the **Documents** tab.
2. Select a transcript from the list that has a summary created.
3. Click on the **Transcripts Summary** icon to expand the panel.

8.4 Citation navigation

Once you have opened an MDB transcript document in the Viewer, you can click on a citation hyperlink to navigate to the relevant text in the Transcript Text panel. You can also access citation hyperlinks on the Case Home tab and clicking on a link from there opens the transcript document in the Document Preview panel.

8.4.1 Citation navigation from the Viewer

If you open an MDB transcript document in the Viewer and expand the Transcript Summary panel, citations display in many of the Transcript Summary sections. Click on a hyperlinked citation to navigate in the Transcript Text panel to the location that generated this part of the Transcript Summary. The relevant transcript text is also highlighted to make it easy to reference.

8.4.2 Citation navigation from the Case Home tab

On the Case Home tab, if you open a Transcript Summary in the Case Documents section, hyperlinked citations display in the document. Click on a citation hyperlink to open the document in the Document Preview panel with the relevant text highlighted.

8.4.3 Downloading a Transcript Summary

You can download a .docx version of a Transcript Summary to your workstation from the text editor. The downloaded document is text-based and includes hyperlinks. If you click on a link, you are prompted to login to Relativity and then the Viewer opens with the linked document highlighting the text referenced by the citation.

To download a Transcript Summary:

1. Navigate to the **Case Home** tab and select the Transcript Summary you wish to download in the Case Documents widget.
2. Click on the **Download Word Document** icon in the text editor toolbar.
   A copy of the Transcript Summary is downloaded to your workstation.

8.4.4 Editing a Transcript Summary

Editing a document's Transcript Summary only affects the summary that displays on the Case Home tab and not the summary that displays in the Viewer for that document.

To view and edit a Transcript Summary from the Case Home tab:

1. Navigate to the **Case Home** tab.
2. Optionally, click on the **Case Documents** widget to expand it.
3. Click on **Transcript Summaries** to display the list of transcript summaries.
4. Select the desired summary from the list.
5. Optionally, edit the Transcript Summary as desired with the text editor.
6. Either click **Save** or enable **Autosave** to save any edits you made.

Note: If you have unsaved changes and try to navigate away from the Transcript Summary, a pop up displays. Click **OK** to discard any unsaved edits and navigate away from the current document or click **Cancel** to stay on the current Transcript Summary so that you can save your edits.

8.4.5 Clearing a Transcript Summary

You can remove a Transcript Summary from a document so that you can create a new one. If you clear a Transcript Summary, it will no longer display in the Viewer for that document but it can still be accessed on the Case Home tab.

To clear a summary of a transcript document:

1. Navigate to the **Documents** tab.
2. Select the transcript document from the list where you wish to clear a Transcript Summary.
   The document opens in the Viewer.
3. Click on the **Transcripts Summary** icon to expand the panel.
4. Click **Clear Summary**.
   The Clear Summary modal displays.
5. Click **Clear**.
   The Transcript Summary is cleared and you can now create a new one for this document.

8.5 Transcript Summary prompt criteria

The prompt criteria in transcript summaries give the large language model (LLM) the broad context surrounding a matter. This includes an overview of the matter, people and entities involved, detail on the legal issues that facts must relate to, and any jargon or terms that might help in understanding the deposition.

The Matter Overview and Summarization Goal fields are required to create a transcript summary.

Most fields display information which can guide the voice and tone of what you write. Further description of the fields for transcript summaries are provided below.

- **Transcript Document**—This option is only available if you are creating a Transcript Summary from the Case Home tab. Click on the drop-down menu and select a transcript file from the list to summarize. You can select either MDB transcript files or file formats such as .txt, .ptf, .lef, .xmptf, .rtf, .trn and .xmef from this drop-down menu.

- **Matter Overview**—Enter a concise overview of the case. Include the names of the parties involved, the nature of the dispute, and other important case characteristics.
- **Summarization Goal**—Outline your side of the argument and what you are trying to achieve in the case. This helps the generative AI determine what information is useful to your case.
- **Issues**—Enter a list of issues in your case and their descriptions.
- **People and Aliases**—Enter the names and aliases of key individuals in the case. Include their role and any other affiliations.
- **Deposition Intent**—Enter why this deposition is being carried out and why the person being deposed is relevant to the case. Additionally, provide information on whether the person is a key witness, providing expert testimony, or providing factual background for the case.
- **Witness Credibility**—Enter how credible the witness is and include information such as their employment history, criminal record, or any conflicts of interest.
- **Additional Context**—Enter any additional information that does not fit the other fields. This section is typically left blank.

9 Transcripts tab

You can see a list of transcripts that were previously uploaded on the Transcripts tab. Alternatively, transcripts can also be opened on the Documents tab. On the Transcripts tab, you can mark a transcript as a key document and open it in the Viewer for review. You can also edit the details of a transcript and download reports on selected transcripts from the Transcripts tab.

Note: There are currently two Transcripts tab in Relativity. The tab described near the top of this page is associated with Relativity.Transcripts and the one further below comes with the Transcripts application. The older Transcripts tab is scheduled for deprecation in the future.

9.1 Transcripts list

The Transcripts list displays any transcript files that were previously uploaded. To learn more about uploading transcripts, see Uploading transcripts.

You can open an uploaded transcript in the Viewer by clicking the **Open in Viewer** icon.

You can mark a transcript as key by clicking the star to the left of the name and then filter the list to only show key transcripts. You can also filter the list by clicking **Filter** and completing any of the following fields:

- **Deposition Date**—Select a beginning and end date to filter the transcript list to only display files uploaded during that time period.
- **Deponent Name**—Click on the drop-down menu and select any deponents you'd like to include in the filter results. Only uploaded transcripts with the selected deponents will display in the list when this filter is active.
- **Show only key transcripts**—Select this option to only display transcript uploads that currently have the star selected.

9.1.1 Edit transcript details

You can adjust a transcript's details from the Transcripts tab.

To edit a transcript's details:

1. Navigate to the **Transcripts** tab and select the transcript in the list that you wish to edit.
2. You can edit the following transcript details:
    - **Date**—Click on the textbox and select the desired date in the calendar menu.
    - **Status**—Hover your cursor below Status and select an option to indicate the current status of the transcript.
    - **Deponent type**—Hover your cursor below Deponent type and select an option to indicate what type of deponent is in the transcript.
    - **Taking attorney**—Click on the textbox and enter the taking attorney's name using your keyboard. When finished, click outside of the field to save their name.
    - **Comment**—Click on the textbox and enter an optional note about the transcript using your keyboard. When finished, click outside of the textbox to save the note.
    - **Proceeding type**—Hover your cursor below Proceeding type and select an option to indicate the type of legal proceeding that is related to the transcript.
    - **Deponent name**—Click on the textbox and enter the deponent's name using your keyboard. When finished, click outside of the textbox to save their name.
    - **Party**—Hover your cursor under Party and select an option to indicate which party is related to the transcript.
    - **Defending attorney**—Click on the textbox and enter the defending attorney's name using your keyboard. When finished, click outside of the textbox to save their name.

9.1.2 Create and export a transcript report

You can create one or more reports on the selected transcripts from the Transcripts tab and export them to your workstation.

9.2 Transcripts application

If you have installed the Transcripts application, you can access the Transcripts tab which contains individual tabs with views for Notes, Exhibits, URLs, Comments, Designations, and Designation types.

Note: While everything described below is still accessible in Relativity, it is scheduled to be deprecated in the future. We recommend starting to use the new upload transcripts feature now so that you can prepare for the deprecation.

9.2.1 Notes tab

The Notes tab contains the following fields:

- **Document** - contains the name of the transcript file. It appears as a hyperlink that opens the file directly in the Viewer.
- **Location** - contains the page and line range in the transcript where the note is found. It appears as a hyperlink that opens the file in the Viewer and takes you directly to the location of the note.

- **Note** - contains the full text of the note. It appears as a hyperlink that takes you to the Notes Layout with full note details.

9.2.2 Exhibits tab

The Exhibits tab contains the following fields:

- **Document** - contains the name of the transcript file. It appears as a hyperlink that opens the file directly in the Viewer.
- **Location** - contains the page and line range in the transcript where the exhibit is linked. It appears as a hyperlink that opens the file in the Viewer and takes you directly to the place where the exhibit is linked. If the exhibit is not directly linked to a location in the transcript, this field will be empty.
- **Document ref** - contains the name of the linked exhibit. It appears as a hyperlink that opens the file directly in the Viewer.

9.2.3 URLs tab

The URLs tab contains the following fields:

- **Document** - contains the name of the transcript file. It appears as a hyperlink that opens the file directly in the Viewer.
- **Location** - contains the page and line range in the transcript where the URL is linked. It appears as a hyperlink that opens the file in the Viewer and takes you directly to the location where the URL is linked.
- **Link** - contains the full text of the URL.

Note: The URL is only text and does not link out. You need to copy the URL and paste it in another window/tab to access the link. From within the transcript, you can click directly on hyperlinked text.

9.2.4 Comments tab

The Comments tab contains the following fields:

- **TranscriptsNote::Note** - contains the full text of the note left on the transcript that a user commented on.
- **System Created By** - contains the name of the user who left the comment.
- **System Created On** - contains the date and time the user left the comment.
- **Comment** - contains the full text of the comment.

9.2.5 Designations tab

The Designations tab contains the following fields:

- **Document** - contains the name of the transcript file.
- **Location** - contains the page and line range in the transcript where the designation type is found. It appears as a hyperlink that opens the file in the Viewer and takes you directly to the designation type location.
- **Designation Type** - contains the type of designation assigned.

9.2.6 Designation Types tab

The Designation Types tab contains the designation types users have created. You can edit or delete designation types in this tab.

10 Upload transcripts

Note: The new transcript upload feature replaces the functionality of Simple File Upload.

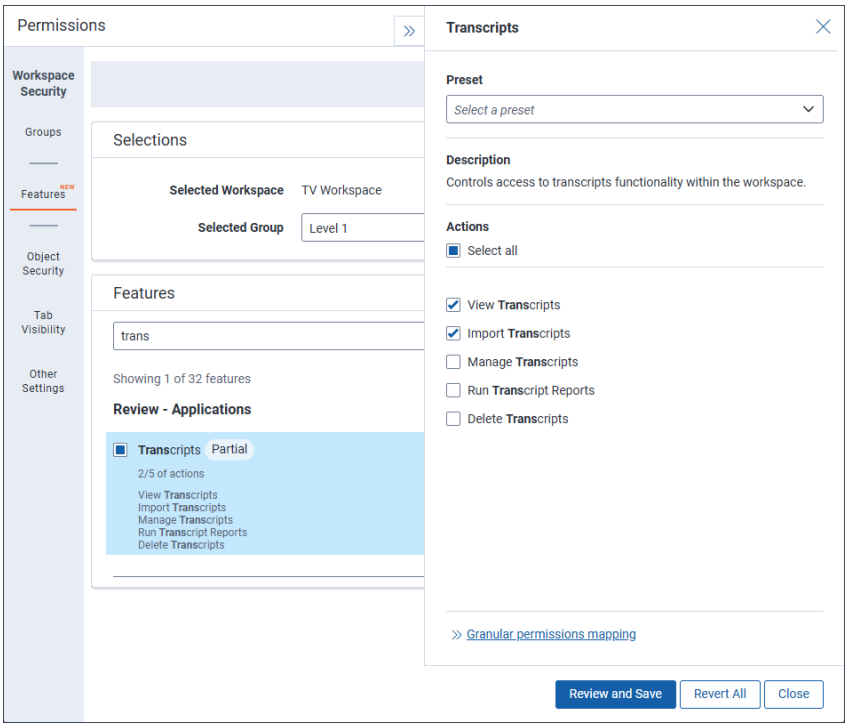
You can upload multiple transcript files in a single job from the Transcripts tab. The following transcript file formats are supported by upload transcript: .mdb, .rtf, .ptf, .txt, .trn, .lef, .xmef, and .xmptf. If you are uploading an .mdb file, a video file must be associated for the .mdb file to be supported in the Viewer. You can attach .mp4 video files and exhibit files to transcript files as part of the upload process.

Once you have uploaded transcripts, you can interact with them on the Transcripts tab.

Alternatively, you can upload .mdb transcripts using Import/Export.

10.1 Permissions

Note: This feature supports feature permission actions. Each action grants access to a specific task within the feature. You can grant groups access to individual actions, allowing them to perform only the tasks they need. To grant access to the entire feature, select all of its actions. Manage feature actions on the Features tab in a group's workspace permissions. For instructions, see Setting workspace permissions. For more information about feature permissions, see Feature permissions.



The following actions must be granted to users to upload transcripts:

- **View Transcripts**—Select to allow users in a group to open the Transcripts tab.
- **Upload Transcripts**—Select to allow users in a group to upload transcripts to Relativity.

10.2 Uploading transcripts

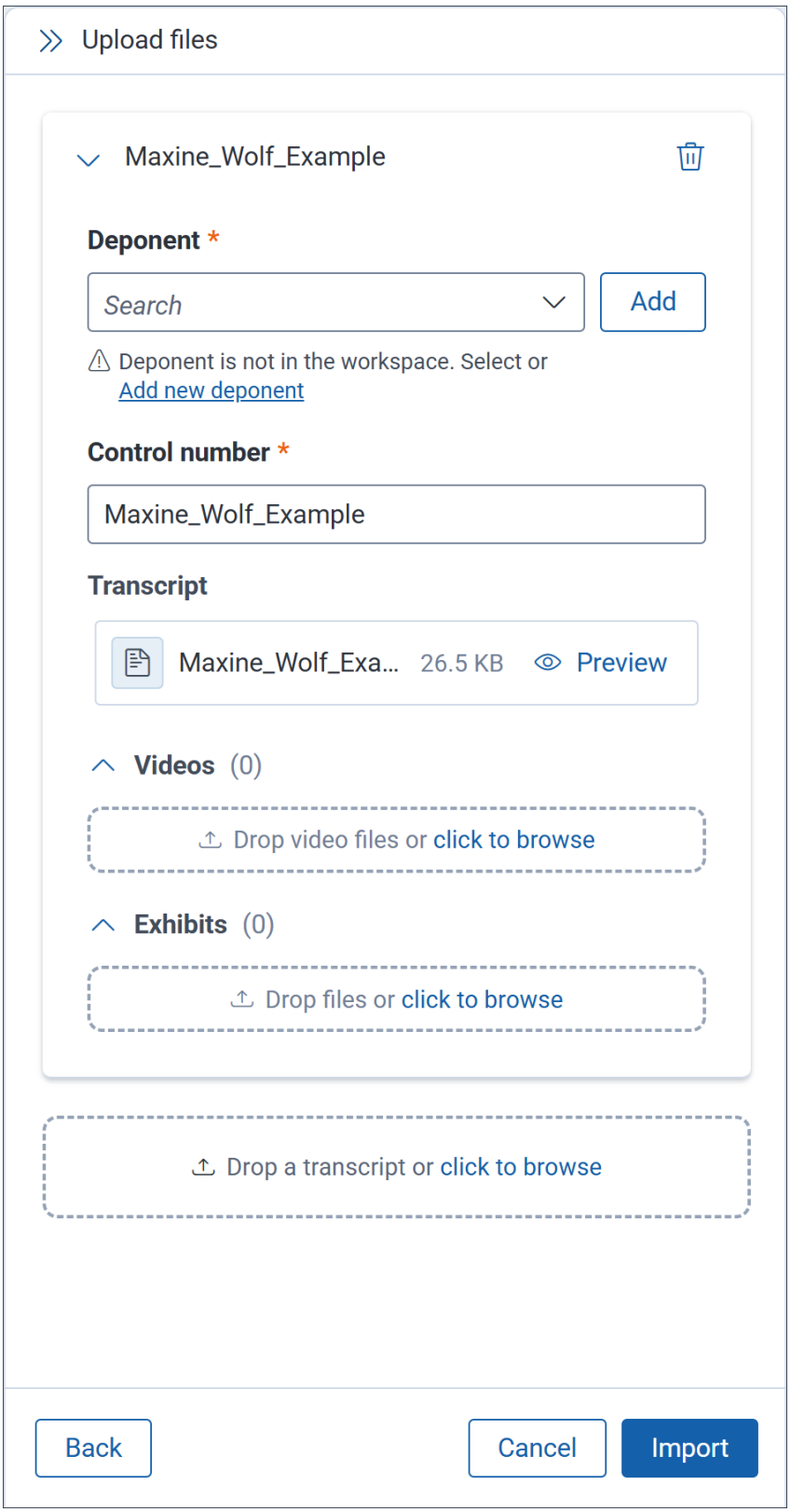
You can upload multiple transcript files at once by drag and dropping them into the upload area. Once this process is complete, you can optionally attach .mp4 video files and exhibit files associated with the transcript.

Note: Once you start importing transcripts, you can navigate away from the Transcript tab and continue using Relativity while you wait. We do not recommend closing your internet browser when uploading transcripts because this disrupts data transfer. Once the upload process progresses to the import step, you can close your browser and the files will still import into the workspace.

To upload transcripts to Relativity:

1. Navigate to the **Transcripts** tab.
2. Click on **Upload**.

3. Either drag and drop the transcript file on the **Drop transcript files here** or click on that area, choose the transcript file you wish to upload, and click **Open**.
4. Once you are done selecting transcripts to upload, click **Next**.



5. Complete the following fields for each transcript you are uploading:
    - **Deponent**—Either select an existing deponent from the drop-down menu or click **Add**, enter the deponent's first and last name using your keyboard, and click **Add Deponent**. Once a deponent has been added, it is available in the drop-down menu to use with other transcript files.

- **Control number**—The name of the transcript file populates in this field automatically. You can edit it to adjust the transcript file's control number. If a transcript file has a non-unique control number, (1) is automatically appended to their name. If another file already has (1) appended, then the next highest unique number is added instead. Once you click **Import**, you are notified if any transcript control numbers are not unique.
  Any exhibit or video files that are uploaded are assigned the file name as a control number. If that results in a non-unique control number, (1) is appended to their name instead. If another file already has (1) appended, then the next highest unique number is added instead.
- **Transcript**—The uploaded transcript file's original name and file type display here along with the file size. Optionally, click **Preview** to see what the transcript file looks like in the Viewer once the upload is complete.
  - After clicking Preview, you can navigate to another transcript file that is being uploaded from the top drop-down menu.
  - If you would like to adjust the formatting of the transcript compared to what was originally provided, you can adjust how the transcript displays by entering a value in the **Lines per page** field.
  - Optionally, you can click on a line in the transcript to make it the new starting point in the document. All lines prior to the one you selected are transparent to help you visualize the new starting point.
  - You can use the icons near the bottom of the page to navigate to different pages or the first or last page in the transcript.
  - When you are done previewing transcript files, click **Close Preview** to return to the previous modal.
- **Videos**—Optionally, either associate .mp4 files to the transcript by dragging-and-dropping them on this field or click on the field, select the desired .mp4 files you wish to upload, and click **Open**. Multiple synced videos are currently only supported with .mdb transcripts.
- **Exhibits**—Any .lef or .xmef files that contain exhibits and are bundled with the transcript file are populated here along with their name and file size. These files are linked in-line with the transcripts as well. Optionally, you can click **Remove** to delete the exhibit.
  To add an exhibit, either drag and drop each exhibit file on the field, drag and drop a folder that contains all of the exhibits grouped together, or click on the field, select the desired exhibit file you wish to upload, and click **Open**. Exhibits that are not part of the .lef or .xmef transcript bundle upload normally but these files are not linked in-line in the transcript document.

6. Once you have completed the fields for each transcript file, click **Import**.
   The process for uploading transcripts has two parts: upload to storage and import to workspace. You can continue using Relativity and navigate away from this tab once the process begins. Once the first step, upload to storage is complete, you can close your browser and the progress will not be disrupted. The Upload files panel displays information on the upload job so you can track progress. Once the upload is complete, you can click **New** to start a new upload job.

10.2.1 Viewing previously uploaded transcripts

You can view uploaded transcripts in two different places. Transcripts can be accessed on the Documents tab in the Transcripts folder. A folder for each deponent is automatically created by Relativity. Within each deponent folder, there are nested folders for transcripts, videos, and exhibits if they were imported alongside the transcript.

You can also view uploaded transcripts on the Transcripts tab.

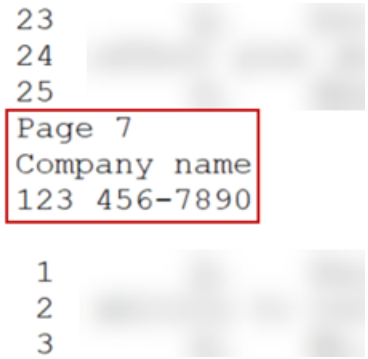
10.3 Transcripts application

Note: While everything described below is still accessible in Relativity, it is scheduled to be deprecated in the future. We recommend starting to use the new upload transcripts feature now so that you can prepare for the deprecation.

10.3.1 Special considerations

Special considerations include:

- The Transcripts application supports transcript files up to 10GB. The upload can be a mix of transcript files, exhibits and video files.
- The Transcripts application does not support transcript files that contain footers. For example, the .txt transcript file below is not supported because it contains a footer.



- The Transcripts application does not support Transcript files that contain a word index before they are uploaded to Relativity. For example, the .txt transcript file below is not supported because it contains a word index.

```
allegations 80:17
83:25 199:13,23
201:5 244:3
allege 199:1
alleged 79:5,14
80:18,24,25 81:6,7
82:1,8,13,24
[6 - alleged]
```

  See Searching transcripts.

- Transcripts are ordered alphabetically in the document list. See below for example:
  - Exhibit 1
  - Exhibit 10
  - Exhibit 11
  - Exhibit 12
  - Exhibit 2
  - Exhibit 20
  - Exhibit 21

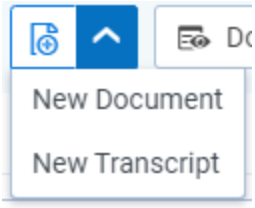
- The Transcripts application doesn't support uploading a draft version of a transcript and then later replacing it with the final version of the transcript. You can import both transcripts to Relativity, but one will not override the other and annotations aren't carried over.

10.3.2 Upload a transcript from the Documents tab

Once uploaded, native files can be seen in the Viewer. All non-native files can be seen in the Extracted Text Viewer instead.

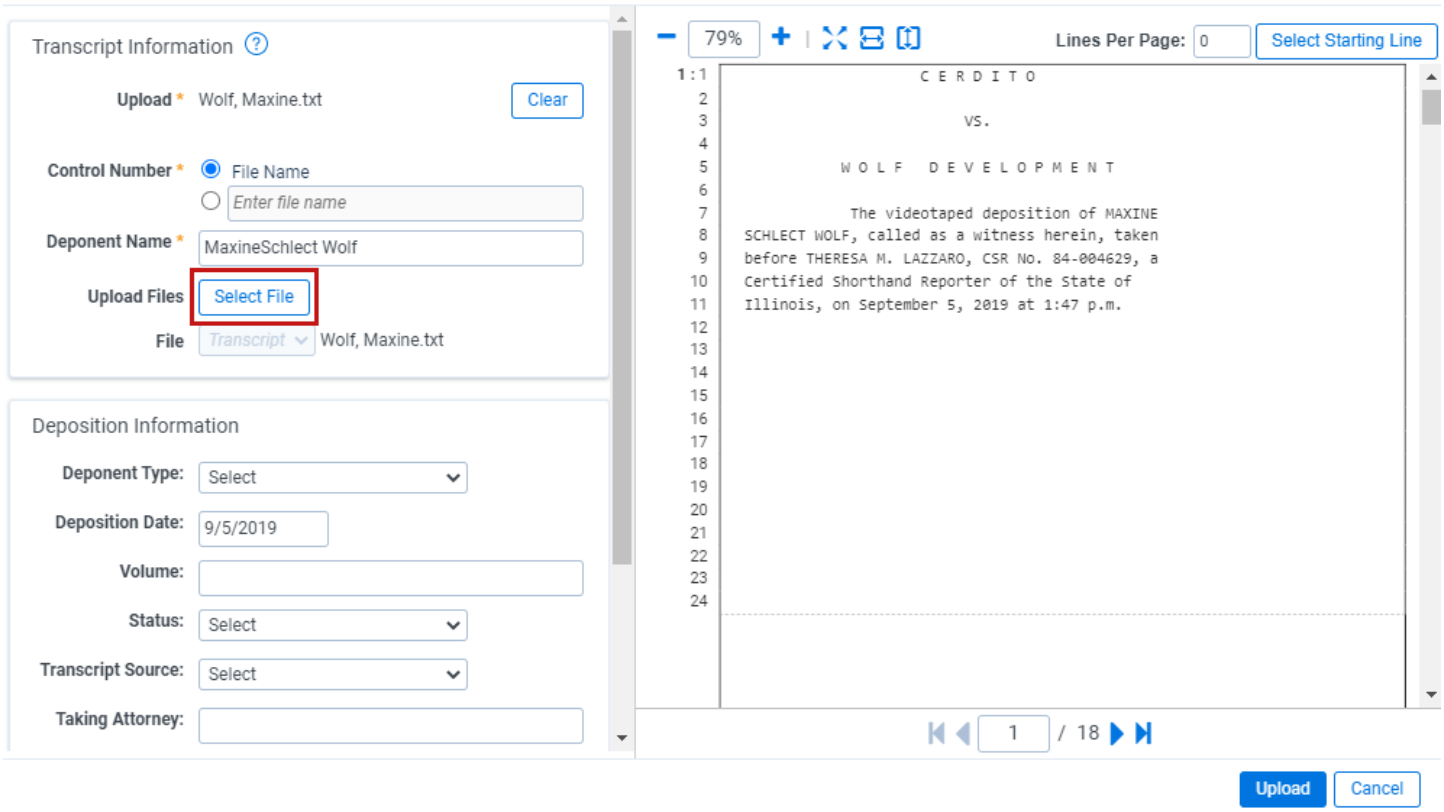
To upload a new transcript to a workspace from the **Documents** tab:

1. Navigate to the **Documents** tab.
2. Click the arrow on the right side of the Simple File Upload icon to open a drop-down menu, and then select **New Transcript**.



3. Click **Choose File** or drag and drop your file to upload. When the transcript imports successfully, a green check mark appears.
   If you uploaded a bundle of files, Relativity extracts the transcript file and displays the extra files as exhibits. Supported bundle file types include .lef and .xmef. To ensure the files are uploaded, the Transcript file name and the file extension must be 200 characters or less.
   Once they are uploaded, you can find the exhibits as document references in the transcripts layout. They will not have a page or line number unless they are directly linked to a page and line on the transcript. Existing links to exhibits in transcripts files will be visible in the Viewer once they are uploaded to Relativity.
4. Click **Select File** to upload exhibits. To upload and link additional exhibits to a transcript, use Simple File Upload and then link the exhibits using the Transcripts layout.

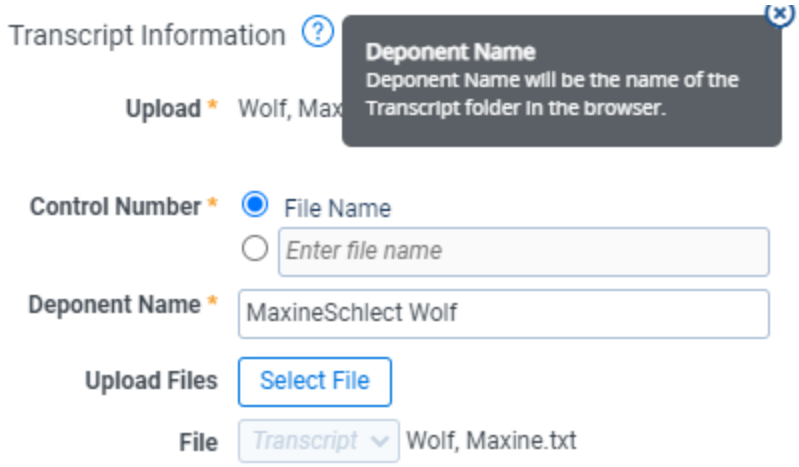
   Note: Only 20 exhibits can be linked to a transcript upon initial upload. By modifying the SFUMaxFilesToUpload instance setting, administrators can increase the number of files you can upload up to 100 files.



5. Fill out the fields:
    - **Control Number** - choose the file name or a enter a control number.
    - **Deponent Name** - enter the name of the deponent.
    - **Upload Files** - click **Select** to choose which exhibit files you would like to add along with the transcript.
    - **Deponent Type** - select Fact, Expert, or Character deponent.
    - **Deposition Date** - enter the date of the transcript's creation.
    - **Volume** - enter the volume of the transcript you are reviewing.
    - **Status** - select Draft or Final.
    - **Transcript Source** - select Hearing, Trial, Or Deposition.
    - **Taking Attorney** - enter the name of the taking attorney.
    - **Defending Attorney** - enter the name of the defending attorney.
    - **Party** - select Plaintiff or Defendant.
    - **Lines per page** - enter the number of lines per page reflected on original transcript file taken by the respective court reporter.
    - **Comments** - add custom comments to the transcript being imported in this custom field.
6. (Optional) If you want to change the number of lines per page, type the number of lines per page that you want into the **Lines Per Page box** and then hit enter on your keyboard. Click **Reset** in the upper right corner to revert the number of lines per page.

7. (Optional) If you want the transcript to have a different starting line, click **Select Starting Line** and then click the line of the transcript that you want to be the first line. Click **Clear** in the upper right corner to revert the starting line.
8. Click **Upload**.

A tool tip indicates that the Deponent Name will be the name of the transcripts folder created.



10.3.2.1 Uploading a video of an interview

Transcripts load files often come with a video of the interview. The video can be played in the Viewer in sync with the text of the transcript.

Note: You must import videos at the same time you are uploading transcripts or the video and transcript cannot sync.

To upload a video using a .txt file:

1. Click **New Transcript**. A pop-up appears.
2. Click **Choose File** or drag and drop your .txt file to upload.
3. Multiple attachments will appear uploaded along with the transcript. Make sure that you keep the .mp4 check box selected.
4. Fill out the relevant fields. See Uploading transcripts with Simple File Upload.
5. Click **Upload**.

To upload a video using a .mp4 file:

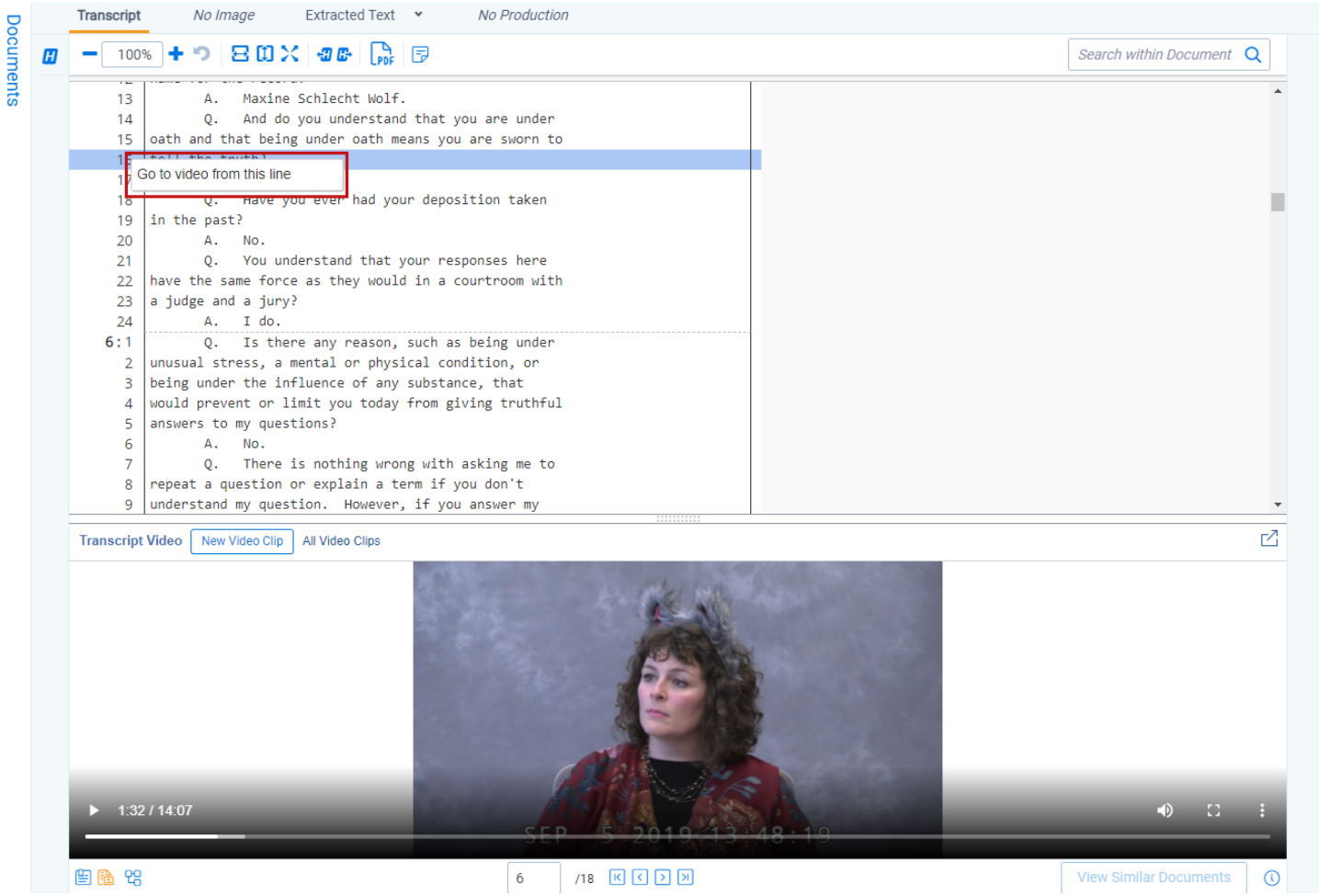
1. Click **New Transcript**. A pop-up appears.
2. Upload your transcript file.
3. Next to **Upload Files** click **Select.**
4. Navigate to your .mp4 file and upload it.
5. Fill out the relevant fields. See Uploading transcripts with Simple File Upload.
6. Click **Upload**.

Videos are not documents and are not stored in the document list in Relativity. Videos are stored as a file field within a transcript. To access a video, you will need to open it from the Viewer or find it in the folder browser. To distinguish videos from transcripts, videos will have the Video Sync icon next to them.

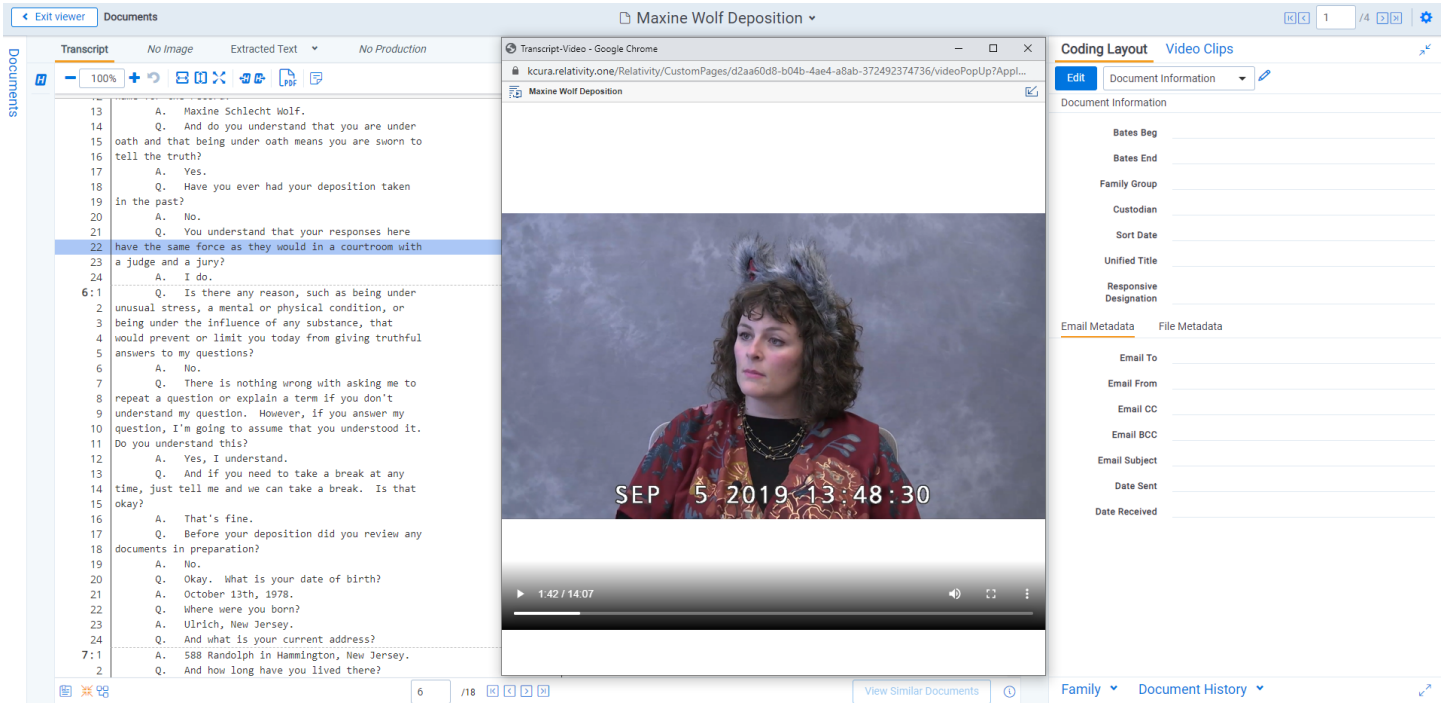
To open the video player in the Viewer, click on the video icon in the bottom, left side of the Viewer.

To go directly to a specific line of the transcript in the video:

1. Hover your cursor over the desired line number.
2. Right-click and select **Go to video from this line**.



To give yourself more room to annotate the transcript, click on the **PopIn Transcripts Video**, which will pop the video player out of the Viewer. To pop the video player back in the Viewer, click on the **Popout Transcripts Video** icon.



10.3.3 Mass importing transcripts with Import/Export

Since a transcript is a document file, you can efficiently mass import transcripts using Import/Export.

10.3.3.1 Before you begin

- Ensure that Import/Export is installed in the workspace where you would like to import transcripts.
- Create a .zip folder that contains your transcript files and any related exhibits.

10.3.3.2 Importing transcripts with Import/Export

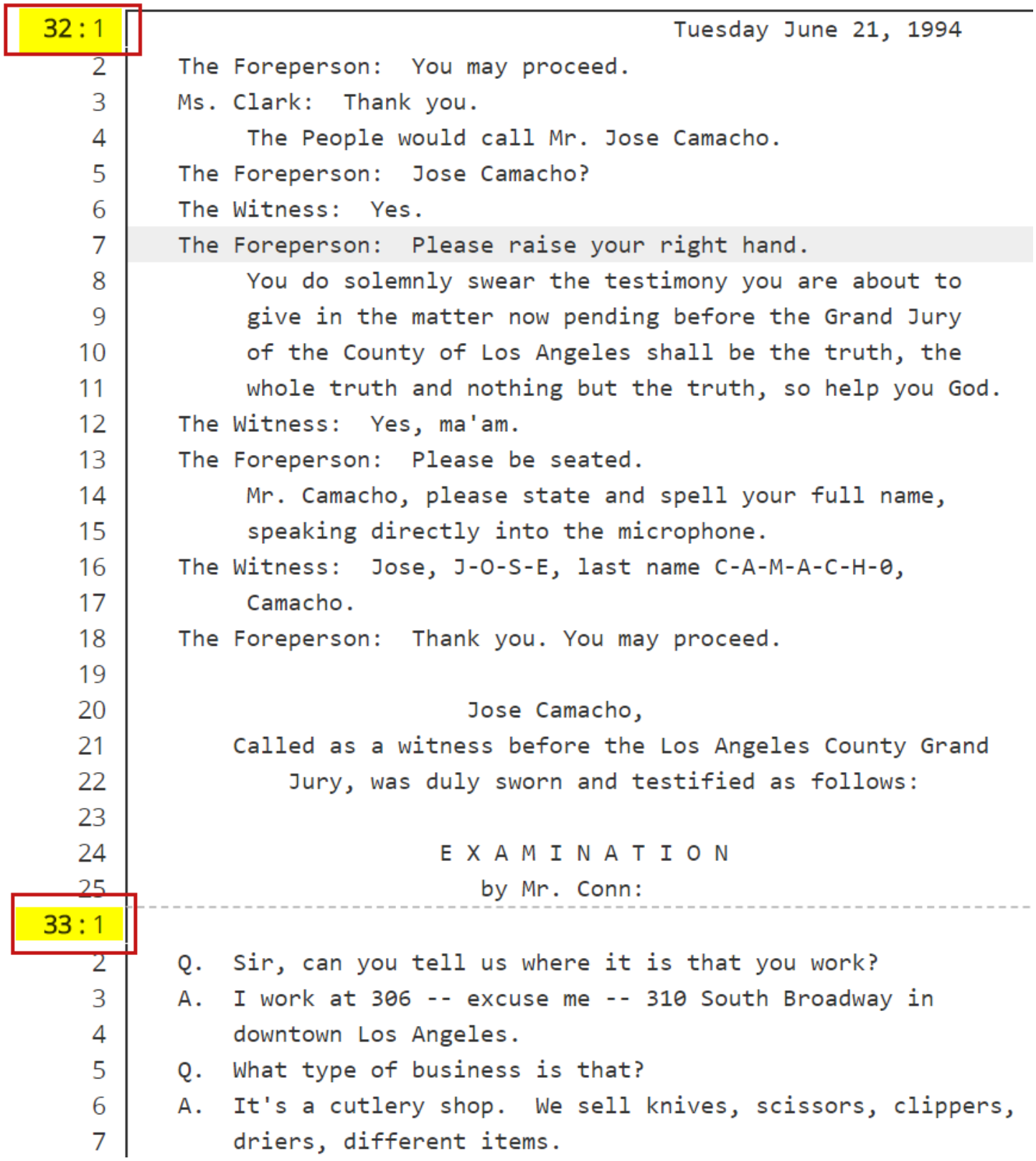
To import transcripts into a workspace:

1. Navigate to the **Import/Export Job** tab.
2. Click on **New Import/Export Job**.
   The Import/Export modal displays.
3. Select **Raw (Unprocessed) Data**.
4. Select and upload the .zip folder that contains your transcript files.
5. Complete the required fields in the modal, select the transcript files as data sources, and assign custodians.
6. Click **Run Job**.
7. Process the transcripts to prepare them for review in Relativity.

10.3.4 Reading transcripts with page number

There may be situations where you only upload a portion of a transcript, or split up a witness transcript in volumes.

Page numbers will appear on transcripts to indicate the page number for the whole transcript, and not the imported portion. The Viewer will still show page number based on the uploaded amount of pages.



32:1
Tuesday June 21, 1994
The Foreperson: You may proceed.
Ms. Clark: Thank you.
The People would call Mr. Jose Camacho.
The Foreperson: Jose Camacho?
The Witness: Yes.
The Foreperson: Please raise your right hand.
You do solemnly swear the testimony you are about to give in the matter now pending before the Grand Jury of the County of Los Angeles shall be the truth, the whole truth and nothing but the truth, so help you God.
The Witness: Yes, ma'am.
The Foreperson: Please be seated.
Mr. Camacho, please state and spell your full name, speaking directly into the microphone.
The Witness: Jose, J-O-S-E, last name C-A-M-A-C-H-0, Camacho.
The Foreperson: Thank you. You may proceed.

Jose Camacho,
Called as a witness before the Los Angeles County Grand Jury, was duly sworn and testified as follows:

E X A M I N A T I O N
by Mr. Conn:

33:1
Q. Sir, can you tell us where it is that you work?
A. I work at 306 -- excuse me -- 310 South Broadway in downtown Los Angeles.
Q. What type of business is that?
A. It's a cutlery shop. We sell knives, scissors, clippers, driers, different items.

10.3.5 Supported file types

The Transcripts application supports a number of different file types. To learn more, see Supported file types for the Transcripts application.

10.3.6 Editing the Transcripts Import Layout

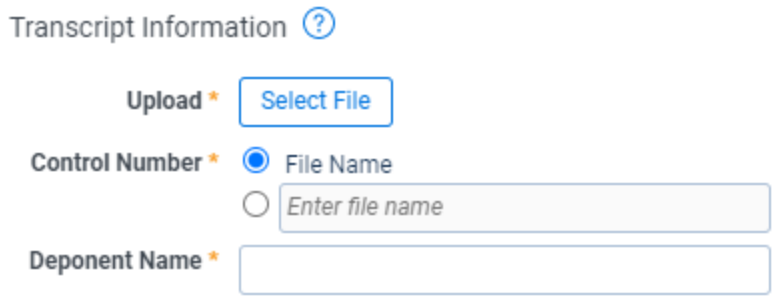
To edit the Transcripts Import Layout:

1. Navigate to the **Layouts** tab.
2. Click on the **Transcripts Import Layout**.
3. Click **Build Layout**.
4. Customize your layout by dragging and dropping fields into the Transcript Fields category. Certain fields will not display as options when you're customizing the Transcripts Import Layout because they are set during the import process of a transcript file. These fields include:
    - Control Number
    - Extracted Text
    - File Extension
    - File Name
    - File Size
    - Is Transcript
    - Transcript Bundle
    - Transcript Deponent Name
    - Transcript Document Type
    - Transcript Metadata
    - Transcript Name
    - Transcript OI Metadata
    - Transcript Viewer Text
    - Transcript Word Index

    For more information, see Using the layout builder.
5. Click **Save**.

The Transcript Information category does not change and includes the following fields:

- Control Number
- Deponent Name



If you upgrade, your customized layout does not change.

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