

Creating Relativity Dynamic Objects

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1 Relativity Objects

Relativity contains two kinds of objects: System objects and Relativity Dynamic Objects (RDOs). Both kinds, collectively called objects, are the building blocks of Relativity applications. Objects connect together, whether implicitly resulting from a workflow, or explicitly by you defining the connections. Through these connections or links, you extend functionality by storing data and making efficient use of its organization. You can attach many kinds of objects to additional features or functionality, such as object rules and event handlers. By attaching objects to additional features you can introduce custom features specific to your needs.

As an example of using objects to extend data reach, from within a workspace, you can create your own RDO for storing custodian information, including not only custodian names but also their emails, sent and received dates, and recipients. This information can then link to other documents or for greater granularity in sorting, searching, or listing those documents.

This page contains the following sections:

- [System objects below](#)
- [Relativity Dynamic Objects \(RDOs\)](#)
- [Programmatically using Relativity objects and RDOs on the next page](#)

1.1 System objects

System objects are objects that come with Relativity applications by default. They are predefined objects that either load during installation or Relativity automatically creates during a process. They include items such as workspaces, documents, fields, and OCR sets. However, Relativity sets their capabilities and you cannot change the design of them. For example, a system object may limit the number of fields that attach to it, or prohibit adding event handlers and object rules.

1.2 Relativity Dynamic Objects (RDOs)

RDOs are objects you define. You can set their capabilities, manage data links to other objects, and incorporate additional features including attaching event handlers and object rules. You can create RDOs from home as well as from a workspace. See [Editing Relativity Objects](#).

Read a scenario for Relativity Dynamic Objects

Using Relativity Dynamic Objects

Imagine you're a system admin and your firm's latest case involves email exchanges between many people with various roles at many different companies. The lead attorney approaches you with ideas for organizing all the custodians, their companies, and their various roles within those companies. You decide to use RDOs to store information about a custodian by creating a custodian object. This object stores information about the custodian - their name, company, role, start date, and so on.

You then connect the custodian object to any related objects such as the document and company objects in the following example.

Using objects in your workspace helps keep items organized in your doc set.

1.3 Programmatically using Relativity objects and RDOs

You can also create and use objects programmatically with the Services API. For information about programmatically working with objects, see [Using the Services API on the Relativity Server2021 Developers site](#).

2 Creating and editing Relativity Objects

RDOs are object types that you create and manage from within any Relativity application. They help process and organize data. For example, you can assign information to them and create new data structures. You can also attach external applications such as event handlers and rules to extend their functionality.

This page contains the following sections:

- [Creating an object from a workspace below](#)
- [Creating an object from home on the next page](#)
- [Deleting an object from a workspace on the next page](#)
- [Deleting an object from home on the next page](#)
- [Fields for an object type on page 9](#)
- [Adding an event handler on page 12](#)
- [Adding an object rule on page 12](#)
- [Adding a custom mass operation on page 19](#)
- [Adding information to objects on page 21](#)

For information about programmatically working with RDO types, see [ObjectType](#) in DTO reference and code samples on the [Relativity Server2021 Developers site](#).

2.1 Creating an object from a workspace

To create an object from a workspace:

1. Click the **Workspace Admin** tab, and then click **Object Type**.
2. Click **New Object Type** to display the Object Type form.
3. Complete the fields on the Object Type Information panel. See [Fields for an object type on page 9](#).
4. Click **Save**.

2.2 Creating an object from home

To create an object from home:

1. Click the **Admin Workspace Configuration** tab, and then click **Object Type**. Only system admins can create objects in this area.
2. Click **New Object Type** to display the Object Type form.
3. Complete the fields on the Object Type Information panel. See [Fields for an object type on page 9](#). Some fields may not be available for Home objects.
4. Click **Save**.

2.3 Deleting an object from a workspace

To delete an object from a workspace:

1. Click the **Workspace Admin** tab, and then click **Object Type**.
2. Select the checkbox next the object you want to delete. You may select more than one object at a time.
3. Select **Delete** from the Mass Operations menu near the bottom left of the page.
4. Click **Go**.
A confirmation dialog displays. If the object has any dependencies, the Dependencies button is active.
5. Click **Delete**.

2.4 Deleting an object from home

To delete an object from Home:

1. Click the **Admin Workspace Configuration** tab, and then click **Object Type**. Only system admins can delete objects in this area.
2. Select the checkbox next the object you want to delete. You may select more than one object at a time.
3. Select **Delete** from the Mass Operations menu near the bottom left of the page.
4. Click **Go**.
A confirmation dialog displays. If the object has any dependencies, the Dependencies button is active.
5. Click **Delete**.

For every Relativity object, you can view details about it, as well as change certain characteristics such as permitting pivot or sampling. Some objects may have additional restrictions or allowances, such as associating them with event handlers, object rules, and mass operations. The following screen shot shows a typical Objects details page.

Object Type Information

Name: Entities

Parent Object Type: Workspace

Dynamic: Yes

Enable Snapshot Auditing On Delete: Yes

Pivot: Enabled

Sampling: Enabled

Lists: Disabled

Use Relativity Forms: _____

Copy Instances On Workspace Creation: No

Copy Instances On Parent Copy: No

Relativity Applications: _____

Control Panel

Field usage: 6.38% (514 bytes used out of 8060). Please note that exceeding this limit may cause system instability or performance issues.

Other

Keywords: _____

Notes: _____

Record History

Created: Smith, Jane - 12/5/2018
4:44:34 PM GMT

Last Modified: Smith, Jane - 12/5/2018
4:44:34 PM GMT

Event Handlers

[New](#) [Delete](#)

Items - (of) [↔](#) [✖](#) [🔍](#) [🔄](#) [📊](#)

<input type="checkbox"/>	DLL	Class Name	Company Name	Description	Execution Type	Application Name
<input type="checkbox"/>	(All)	(All)	(All)	(All)	(All) ▼	(All)

Rules

[New](#) [Delete](#)

[↔](#) [📊](#)

<input type="checkbox"/>	Name	Type	Field	Value	Action	Artifact ID
--------------------------	------	------	-------	-------	--------	-------------

Mass Operations

[New](#) [Delete](#)

Items - (of) [↔](#) [✖](#) [🔍](#) [🔄](#) [📊](#)

<input type="checkbox"/>	Name	Type	Custom Page URL	Class Name	Application Name
--------------------------	------	------	-----------------	------------	------------------

0 Selected Item(s)

Select Page Size: ▼

The objects details page appears in one of two ways:

- When you create a new object. The details page appears after you click **Save** on the Object Type form for a newly created object. See [Creating an object from a workspace on page 6](#)
- From the objects list. Click the object's name from the **Object Type** object list. Clicking **Edit** partially displays the details page, but the additional actions of event handlers, rules, or mass operations do not appear.

The information page displays in two parts. The first part displays the Action bar near the top of the page followed by several categories about the object type settings.

You can use the Action buttons near the top of this page to perform these tasks:

- **Edit** - edits certain object type details. You can't change some details after you create an object.
- **Delete** - removes the object type from Relativity. After you click **Delete**, a confirmation message appears. If the object has dependencies, that is, the object uses or links with other objects, the **Dependencies** button is active. See [Deleting object dependencies](#).
- **Back** - redirects you back to the Object Type list page.
- **Edit Permissions** - opens a window that lets you set access rights on the object. These rights modify only the security for the current object. The object is secured with the following default rights:
 - If you created the object within a workspace, it inherits workspace-level rights, unless it inherits permissions from a parent object.
 - If you created the object within Home, it inherits the client rights, unless it inherits permissions from a parent object.

See the Admin guide for more information on security.

- **View Audit** - displays the update history for the object type.

The second part displays additional actions that you can attach to the RDO. Not all RDOs will have additional actions, and only the available actions appear. Before adding any actions, consult your system admin. When present, you can attach the following actions:

- **Event Handlers** - adds special functionality or conditions to layouts. See [Adding an event handler on page 12](#).
- **Rules** - adds special functionality or conditions with user configurable options to layouts. See [Adding an object rule on page 12](#).
- **Mass Operations** - provides the ability to add functionality for mass operations using mass operation handlers or custom pages. See [Adding a custom mass operation on page 19](#).

2.5 Fields for an object type

When creating or editing an object, the object type form contains the following fields:

Object Type Information

Name:

Parent Object Type:

Dynamic: Yes

Enable Snapshot Auditing On Delete:

Pivot:

Sampling:

Lists:

Use Relativity Forms:

Copy Instances On Workspace Creation:

Copy Instances On Parent Copy:

Relativity Applications:

Other

Keywords:

Notes:

- **Name** - the name of the object.
- **Parent Object Type** - select the object type the object links to. That is, the object that you are creating is a child of the selected object type. The list of available parent objects displays in the drop-down menu.
- **Dynamic** - indicates whether you can extend an object by adding fields, views, and other items. It's set to **Yes** for Document objects and all RDOs. It's set to **No** for system objects, excluding Document objects.
- **Enable Snapshot Auditing On Delete** - captures audit information about the values stored in object fields. The following options are available:
 - **Yes** - the default setting, which results in Relativity capturing a snapshot of the current field values for the object. By capturing this data, the size of the delete audit record increases, but the

- field values are available when querying the workspace history.
 - **No** - indicates that Relativity deletes the object without capturing its field values.
- **Pivot** - enables or disables pivot functionality on the object. The default value is **Enabled**, which displays the Pivot icon on the object tab. Pivot runs on only the object fields when enabled. Select **Disabled** to remove the icon from the object tab.
- **Sampling** - determines if sampling functionality is enabled on the object you are creating or editing. The default is Enabled for a new RDO. It is also enabled for the Document object, which means you can create a sample of documents for QC purposes using the settings in the sampling menu. The options are:
 - **Disabled** - hides the sampling menu on the object you are creating or editing.
 - **Enabled** - displays the sampling menu on the object you are creating or editing.
- **Lists** - determines if the user has the ability to save a list of this object's items as a persistent list. The options are:
 - **Disabled** - hides the Persistent Lists icon on the object you are creating or editing.
 - **Enabled** - makes the Persistent Lists icon available on the object you are creating or editing.
- **Use Relativity Forms** - determines whether this type's Layouts are rendered using the Relativity Forms engine, a new Layout-rendering option, providing the developer with robust JavaScript APIs and a granular front-end page life cycle for easier, more controlled Relativity Object customization. For more information, see [Relativity Forms API Relativity Forms API Relativity Forms API](#). For more information, see Relativity Forms API on the Developers site. The options are:
 - **Yes** - use Relativity Forms to render the Layout (view, edit, and new) pages for objects of this type.
 - **No** - do not use Relativity Forms for objects of this type.
 - **(Not Set)** - leave the decision whether or not to render this type's Layout pages using Relativity Forms up to the DefaultUseRelativityFormsValue Instance Setting.
- **Copy Instances On Workspace Creation** - determines whether Relativity copies instance of an object when you create a workspace. Relativity copies RDOs from the template workspace regardless of this field's value. **Copy Instances On Workspace Creation** only controls whether or not Relativity copies object instances to the new workspace. Consider the following when setting this value:
 - If the template workspace contains an object with **Copy Instances On Workspace Creation** set to **Yes**, but one of its associative objects has this same field set to **No**, the instances are unlinked from the object. The new workspace copies the object type, but none of the instances.
 - An instance of an object type doesn't copy if its parent object is set to **No**.
 - An instance of an object type doesn't copy if its parent object contains a File field.
 - You can't copy instances if the template workspace contains an object that is associated with a Document object.
- **Copy Instances On Parent Copy** - copies all child objects when the parent object is copied. This option only copies child objects that do not have Workspace as their parent object. This option is also disabled on parent objects.
 - **Yes** - copies all child objects if the parent object is copied.
 - **No** - does not copy any child objects attached to the parent object.
- **Relativity Applications** - associates the object type with an application created on the Relativity Applications tab. Click the **ellipsis (...)** button to select an existing application. To use this option, you must have the permission **Manage Relativity Applications** in the Admin Operations section of the Security page.
- **Keywords** - filters on the object type in a view, as well as for other identification purposes.

- **Notes** - enter additional comments about the object type.

2.6 Adding an event handler

An event handler is a process or action that attaches to an RDO. The event handler permits special or additional functions but without user configurable options. It introduces restrictions, limitations, or addition actions. It activates explicitly on a user event, such as clicking a specific button, or implicitly such as receiving a message or encounters a data limitation. You may need to consult your system admin for additional information.

You can add an event handler at the time you create an RDO or edit an object. To add an event handler:

1. [Create an RDO](#) or see the [Creating and editing Relativity Objects on page 6](#) section.
2. Click **New** in the Event Handlers category on the Object Type Details page.
The Select Event Handlers dialog appears. All the available event handlers display as DLL files.
3. Select the checkbox for each event handler that you want to add.
The list may contain several event handlers with the same name, so select one with the appropriate execution type and application. You may need to consult your system admin for additional information.
4. Click **OK**.
The event handler file name appears in the DLL column. Its action becomes immediately available and invokes the condition is met.

2.6.1 Deleting an event handler

To delete an event handler:

1. Click the name of an object to display the Object Type Details page.
2. Select each event handler that you want to delete.
3. Click **Delete** in the Event Handlers' category.
4. Confirm the action by clicking **OK**.

2.7 Adding an object rule

An object rule is a Relativity-provided action that permits special or additional functions with user-configurable options. An example is the **New Button Override** that redirects an object's **New** button action to another Relativity page or other URL as directed by the user.

Permissions don't control restrictions or allowances granted by an object rule . For example, if the object rule **Mass Action Visibility** hides the **Edit** option in the Mass Actions menu, adjusting permissions doesn't make that option visible. In the same way, if that rule shows the Edit option, removing permissions doesn't hide it.

To add an object rule:

1. [Create an RDO](#) or display the [Creating and editing Relativity Objects on page 6](#) page.
2. Click **New** in the Rules category.
The Add New Rule dialog displays.
3. Select the Rule Type.
Each Rule Type has a unique set of conditions or configuration listed individually.
4. Complete the fields for the selected Rule Type. See [Creating and editing Relativity Objects on page 6](#).
5. Click **Save**.

The following object rule types are available:

- [Default Layout below](#)
- [Custom Single Object Add Link Visibility on the next page](#)
- [Default Layout on New on the next page](#)
- [Global Button Visibility on the next page](#)
- [Mass Action Visibility on page 15](#)
- [New Button Override on page 17](#)
- [Choice Behavior on page 16](#)
- [Sub-List Button Visibility on page 16](#)
- [Override edit link URL on page 18](#)
- [Override view link URL on page 19](#)

2.7.1 Default Layout

The Default Layout rule determines which layout that a reviewer sees by default, or if the reviewer can see any layout at all. One default layout displays per document. If there are multiple default layouts for a single document, Relativity will select the default layout with the lowest Artifact ID to display. To change the default layout for a document, create a new default layout with a lower numbered Artifact ID than the current default.

The field choices are:

- **Rule Type** - specifies using a default layout.
- **Name** - the name for the rule.
- **Field** - the field that drives the rule behavior. The drop-down list contains the complete set of fields available.
- **Value** - the field value that drives the rule behavior. The drop-down list contains the complete set of values available for the selected field.
- **Action** - the layout that displays based on the **Field** and **Value** conditions. The drop-down list contains the complete set of layouts available for the parent object.
- **User can select another layout** - determines the layouts reviewers can see.
 - If checked, reviewers see the layout selected in the **Action** field by default. They are also able to move to another layout.
 - If not checked, reviewers see only the layout selection in the **Action** field.

Write an Example

You want a rule controlling the layout that a reviewer sees in first and second pass reviews. Assume the workspace contains:

- A **First Pass Review Complete** single choice field with **Yes** and **No** values.
- A **First Level Review** layout.
- A **Second Level Review** layout.

When the **First Pass Review Complete** field is equal to **Yes** for a document, the reviewer is taken to the **Second Level Review** layout automatically and is able to see only that layout. For this case:

1. Add a rule to a Document object, selecting **Default Layout** for the **Rule Type**.
2. Set **Field** to **First Pass Review Complete**.
3. Set **Value** to **Yes**.
4. Set **Action** to **Second Level Review**.
5. Uncheck **User can select another layout**.

2.7.2 Custom Single Object Add Link Visibility

You can control the availability of the **Add** link button to add RDO instances to existing custom single objects from a layout.

The field choices are:

- **Custom Single Object Add Link Visibility** - controls availability of the **Add** link to add object instances to existing objects from a layout. When you apply the Custom Single Object Add Link Visibility object rule to an object, clearing the **Show Add Link** checkbox means that the Add link won't display the custom single object field pointing to that object, and you won't be able to add object instances from a layout.
- **Name** - the name for the rule.
- **Visibility** - determines if the Add link is visible for the object.
 - If checked, the Add link is visible.
 - If not checked, the Add link is not visible.

Note: System single object fields and custom single object fields of Document object type don't display the Add link.

2.7.3 Default Layout on New

You can determine which layout displays when a user creates a new custom object.

The field choices are:

- **Default Layout on New** - determines which layout displays when a user creates a new custom object.
- **Name** - the designation used to identify the rule. This is the friendly name for the rule.
- **Action** - determines which layout displays by default.

2.7.4 Global Button Visibility

You can determine the visibility of specific buttons or action options available on an object type.

The field choices are:

- **Global Button Visibility** - determines the visibility of specific buttons or action options available on an object type.
- **Name** - the name for the rule.
- **Visibility** - determines the visibility of specific buttons or action options available for an object type. The following table outlines the effect of clearing these checkboxes.

Visibility Option	When You Clear this Check box:
Show New	The following options do not display: <ul style="list-style-type: none"> ■ New button on the Object List page ■ Mass Copy on the Object List page, and on any other page where the mass operation is available for this object type ■ Save & New button on the edit page for an object instance ■ New button on child or associative object lists of this object type
Show Delete	The following options do not display: <ul style="list-style-type: none"> ■ Mass Delete on the Object List page, and on any other page where the mass operation is available for this object type ■ Delete button on the details page for an object instance
Show Link	The Link button doesn't display on associative objects lists added to the layout of another object associated by a multiple or single object field to the current object type. See the Admin guide for more information on Adding child and associative object lists.
Show Unlink	The Unlink button doesn't display on associative objects lists added to the layout of another object associated by a multiple or single object field to the current object type. See the Admin guide for more information on Adding child and associative object lists.

Note: A Sub-List Button Visibility rule overrides a Global Button Visibility rule when a conflict occurs between the two.

2.7.5 Mass Action Visibility

You can control the visibility of buttons for the mass operations for an object type.

The field choices are:

- **Mass Action Visibility** controls the visibility of the Edit, Replace, Copy and Tally/Sum/Average mass operations for an object type.
- **Name** - the name for the rule.
- **Visibility** - determines the visibility of specific buttons or action options available on an object type. When you add a Mass Action Visibility rule, the visibility check boxes are clear by default. If you

don't select the visibility check box for a given mass operation, then that option won't be available in the mass operations drop-down list for the object.

Note: If the object has a Global Button Visibility rule with the Show New visibility option disabled, then the Copy mass operation doesn't display even if the Show Copy check box is selected.

2.7.6 Choice Behavior

You can control whether the users can add or delete choices for fields.

The field choices are:

- **Choice Behavior** - controls whether your users can add or delete choices for fields.
- **Name** - the name for the rule.
- **Field** - the field the choice behaviors affect.
- **Behavior** - which actions apply to the choices. The following table describes the expected behavior when applying a Choice Behavior object rule to a single- or multiple-choice field.

Behavior When you clear this checkbox:	
Allow Add	<ul style="list-style-type: none">■ the Add hyperlink doesn't appear for the selected single- or multiple-choice field■ the field you configured in the object rule is unavailable in the Field drop-down menu when creating a new choice in Administration::Choices■ a user can't perform a Mass Copy action on choices
Allow Delete	<ul style="list-style-type: none">■ the Delete button doesn't appear in Administration::Choices form■ a user can't perform a Mass Delete action on choices
Allow Rename	<ul style="list-style-type: none">■ users don't have the ability to rename choice names

2.7.7 Sub-List Button Visibility

You can provide granular control over the display of the buttons for child and associative object lists.

The field choices are:

- **Sub-List Button Visibility** - provides granular control over the display of the buttons for child and associative object lists. You can define a condition that determines the availability of these options, or you can create a rule that targets these options for a specific associative or child list without defining any condition.
- **Name** - the name for the rule.
- **Associative/Child Object** - displays all child or associative objects lists for the object type. You control the button visibility for this object type. See the Admin guide for more information on Adding child and associative object lists.
- **Field** - optional field setting a condition for controlling the display of the Visibility options. Only single choice fields appear in the **Field** drop-down menu.

- **Field** and **Value** - specifies the value of the selected field that affects the button visibility.
- **Visibility** - the list of options controlling the display of specific buttons. The list of button options depend on the Associative/Child Object type:
 - If Associative/Child Object is a child object list, only the Show New and Show Delete options display.
 - If Associative/Child Object is an associative object list, only the Show New, Show Link, and Show Unlink options display.

The following table describes how to hide a button by clearing its checkbox. If Field and Value are blank, the buttons are always hidden or displayed, depending on the selected checkboxes.

Visibility Option	When you clear this checkbox:
Show New	The New button doesn't display on the list selected in the Associative/Child Object option.
Show Delete	The Delete button doesn't display on the child object list selected in the Associative/Child Object option.
Show Link	The Link button doesn't display on the associative object list selected in the Associative/Child Object option.
Show Unlink	The Unlink button doesn't display on the associative object list selected in the Associative/Child Object option.

2.7.8 New Button Override

You can override the page that displays by default by clicking **New** on the object page. Enter a URL in the Link field. Clicking **New** on the object page bypasses the default edit page and launches this URL.

The field choices are:

- **New Button Override** - overrides the page displayed by default when clicking the New button on the object page.
- **Name** - the name for the rule.
- **Link** - the URL when you click New. This follows the standard URL notation.

Use the following case insensitive text replacement options to customize the URL, allowing you to display current details about your workspace:

Text Replacement Option	Replacement Text
%AppID%	AppID=<Current Workspace ID>
%ApplicationPath%	The actual application path
%ArtifactTypeID%	ArtifactTypeID=<Current ArtifactTypeID>
%AssociatedArtifactID%	AssociatedArtifactID=<Current Instance Artifact ID>

Text Replacement Option	Replacement Text
%AuthenticationToken%	AuthenticationToken=<New Authentication Token>
%ConnectorfieldArtifactID%	ConnectorFieldArtifactID=<Current Connector Field Artifact ID>
%ParentArtifactID%	ParentArtifactID=<Current Parent ArtifactID>
%SystemID%	SystemID=<Current System ID>
%SelectedSearchArtifactID%	SelectedSearchArtifactID =<Current Search Artifact ID>

The link double encodes the text so if you use text replacements, you have to also include in the *DirectTo* definition the ASCII character hex values for symbols. Common symbols include:

- %25 for "%"
- %2f for "/"
- %3f for "?"

See [Example 2](#) for a sample usage.

As an alternative to using text replacement, copy and paste the URL of the destination page into the Link value.

Examples:

1. You are creating and RDO. In order to complete the fields properly, you would like users and developers to read your documentation about that object. Use a Link value like, but specific to your actual page: `https://www.example.com/CustomObjectInformation`.
2. You are creating an RDO. You want users to go to a Relativity custom page instead of being able to create new object. This example uses the GUID of the object. Use a Link value like, but specific to the actual page: `%applicationPath%/External.aspx?%AppID%&DirectTo=%25applicationPath%25%2fCustomPages%2f1601ea45-5ac3-47f0-92e7-92f04fe91e91%2f%3f%25AppID%25&SelectedTab=1044864`.

2.7.9 Override edit link URL

You can override the page that displays by default when clicking the edit link on the object page. In some cases you may need to customize an RDO's view page, perhaps to include a custom page or an external web site. You can use this control to override the standard view URL and specify your own page or destination. As an example, the authentication's provider method view page uses custom controls and overrides the standard edit links.

Enter a URL in the **Link** field. Clicking Edit on the object page bypasses the default edit page and launches this URL.

The field choices are:

- **Rule Type** - select **Override Edit Link URL** to override the default page that appears when clicking the **Edit** link on the object page.

- **Name** - specifies the name for the rule. This name appears in the Parent Object Type field of the Object Type view list.
- **Link** - specifies the URL when you click the **Edit** link. This follows the standard URL notation.

2.7.10 Override view link URL

You can override the page that displays by default when clicking the object name link on the object page. In some cases you may need to customize an RDO's view page, perhaps to include a custom page or an external web site. You can use this control to override the standard view URL and specify your own page or destination. As an example, the authentication's provider method view page uses custom controls and overrides the standard view links.

Enter a URL in the **Link** field. Clicking the object name on the object page bypasses the default view page and launches this URL.

The field choices are:

- **Rule Type** - select **Override View Link URL** to override the default page that appears when clicking the object name on the object page.
- **Name** - specifies the name for the rule. This name appears in the **Parent Object Type** field of the **Object Type** view list.
- **Link** - specifies the URL when you click the object name. This follows the standard URL notation.

2.8 Adding a custom mass operation

You can associate a custom mass operation with your new object type. You can create a custom page that appears when the user runs the custom mass operation, or you can develop your own mass operation handler assembly that uses a standard Relativity layout. For more information, see Mass Operation handlers or Custom pages in the Relativity Server2021 Developers site.

Note: Relativity adds your custom mass operation to the Mass Actions section of the security page for a workspace. You can control the groups with access to the mass operation from this page. By default, all groups have access to your custom mass operation unless you restrict them from using it.

Use the following procedure to add a mass operation:

1. Click **New** in the **Mass Operations** category on the [Object Type Information](#) page.
2. Complete the fields on the Add New Mass Operation dialog. See [Mass operation fields below](#).
3. Click **Save**.

2.8.1 Mass operation fields

- **Name** - determines the name of the mass operation that appears in the Relativity user interface.
- **Relativity Applications** - links the mass operation to one or more applications. The Select Item dialog lists only applications that are currently unlocked. Relativity displays the mass operation on the details view of any applications that you select. This mass operation is also included in an application when

you lock or export it.

Note: If you are adding a mass operation that uses a mass operation handler, you should select only one application. This application must include the assembly that contains the class with the code for the mass operation. Failure to use the appropriate application causes an error. To view this error, click **Show Errors** in the Relativity Application console on the application details view.

If your mass operation requires a custom page tied to a specific application, you should select this application. For custom pages, you need to verify that the URL or page works properly, since you won't see an error if you select a mass operation that isn't tied to the domain.

- **Pop-up Directs To** - select one of the following and then complete the additional fields for your selection.
 - **Custom Page** - select a custom page as the target for the mass operation. See [Additional fields for custom pages below](#).
 - **Mass Operation Handler** - select a mass operations handler as the target for the mass operation. See [Additional fields for mass operation handler below](#).

2.8.1.1 Additional fields for custom pages

When you select Custom Page, Relativity displays the following additional fields:

- **Custom Page URL** - indicates the URL of the page after clicking **Go** on the mass operations bar.

Note: When you develop your mass operation, you can create your own custom page or use the Relativity custom page framework. See [Customize the UI](#). See [Customize the UI](#). See [Customize the UI](#). For more information, see [Customize the UI](#) on the Relativity Developers site.

- **Set Default Pop-up Height (in pixels)** - indicates the number of pixels used to display the height of the custom page. The default value is 250 pixels.
- **Set Default Pop-up Width (in pixels)** - indicates the number of pixels used to display the width of the custom page. The default value is 250 pixels.

2.8.1.2 Additional fields for mass operation handler

When you select Mass Operation Handler, Relativity displays the following additional fields:

- **Select Mass Operation Handler** - click  to choose an assembly containing the class that provides functionality for your mass operation. When you select a mass operation handler, make sure that it is associated with the correct Relativity Application. Check the **Application Name** column on the **Select Mass Operation** dialog to confirm that you have the correct handler. If you aren't using a mass operation for a specific application, you can select one associated with the Default application. You may also check with your system admin for additional details.

To display your custom mass operation handlers in this list, add them to Relativity as resource files. See [Resource files](#) and [Mass Operation handlers](#) in the Relativity Server2021 Developers site. See [Mass Operation handlers](#) in the RelativityOne Developers site. See [Mass Operation handlers](#) in the Early

Access Developers site. See Resource files in the Relativity Server 2021 Documentation site and Mass Operation handlers in the Developers site.

- **Select Layout** - click  to choose the layout that appears after the user clicks **Go** on the mass operations bar. You can define custom layouts for your mass operations on this object type. When you create a layout, select your new object type in the Object Type field. If you are adding this mass operation to an application, make sure that the layout and object type are components of this application.

After you click **Save**, the **Class Name** column in the Mass operations section displays the class containing the code for the handler. The **Application Name** column displays the application domain where the assembly containing the class for handler has been loaded.

2.9 Adding information to objects

You can add information to Dynamic Objects in the same way you add information to documents in Relativity. In addition, you can export this information to an external file using the Relativity Desktop Client.

A new object has defaults for fields, a view, and a layout. You can add fields to Dynamic Objects and place those fields on layouts and views. To learn more about adding information to objects, see the following in the Admin guide:

- Fields
- Layouts
- Views

3 Deleting object dependencies

Deleting object dependencies removes that object's interactions, or dependencies, from other objects. Because the purpose of objects is to interact with other objects, there may be a certain amount of dependencies. Most are created at the time the object is initially instantiated, although you can add some later, either implicitly as a result of a workflow, or manually adding one, such as an event handler. However, deleting some dependencies may have unexpected effects on other objects. To mitigate those effects, Relativity may display a dependencies report, and asks you to confirm before deleting.

You also need to have the correct level of permissions. See your system admin for addition details. With the **Delete Object Dependencies** permission, you can force delete the current object, which includes deleting its children and unlinking associative objects.

3.1 Force deleting object dependencies

The option to delete object dependencies appears only when you have the corresponding delete object dependencies security permission. See the Admin guide for more information on Security Permissions.

Before you force delete an object, you should:

- View a report listing the affected objects by clicking **Dependencies**. For more information, see [Displaying and interpreting the dependencies report below](#).
- Think about the fields of the selected object before forcing a delete. For more information, see [Considering the fields of force deleted objects on the next page](#).

To force delete one or more documents or RDOs:

1. Navigate to the parent or child tab of the object you want to delete.
2. Click the name of the single object that you want to delete, and then click **Delete** on the object details page. If you want to mass delete objects, select the items you want to delete, and then select **Delete** from the mass operations menu. See the Admin guide for more information on Mass delete.
3. Click **Delete** to remove the object and its children and to unlink associative objects.

Note: If the **Delete** button is disabled, then you don't have the security permission **Delete Object Dependencies**. See the Admin guide for more information on Security Permissions.

For information about programmatically deleting dependent objects, see RDO in DTO reference and code samples on the Relativity Server2021 Developers site.

3.2 Displaying and interpreting the dependencies report

The dependencies report helps you understand how deleting an object affects its child and associative objects. You can run this report before deleting an object or group of objects to determine how this operation changes your workspace. The dependencies report is available for workspace-level objects in Relativity, including documents. You can display this report when you delete a single object or perform a mass delete operation.

To display the dependencies report, click **Dependencies** in the Delete Object Type dialog. If the object(s) you're trying to delete doesn't have any children or associative objects, the **Dependencies** button is disabled.

The dependencies report displays a list of the object's child and associative objects as well as a count of each object type.

Use Relativity's filter, sort, and page features to manage your report results. You can also mass export the report results to an Excel file. See the Admin guide for more information on Mass export to file.

A dependency report contains the following fields:

- **Object Type** - identifies child and associative objects that have a dependency on the selected object.
- **Action** - displays **Delete** for child objects and **Unlink** for most associative objects. When you force delete the selected object, Relativity automatically performs these actions on child and associative objects.

- **Count** - indicates the number of object instances for each object type dependency on the selected object.
- **Connection** - indicates the type of dependency that exists between the selected object and the object type listed in the report.

3.3 Considering the fields of force deleted objects

The dependencies report provides information about the relationship between the selected object and other child or associative objects. However, it doesn't list objects that reference the fields on the selected object because they're not identified as children or linked by association.

When you force delete an object, Relativity may modify the content of the object's fields or delete them. Because other objects may reference these fields, make sure that you have a clear understanding of how they're used in Relativity.

The following examples illustrate how the force delete of an object affects references to its fields.

3.3.1 Analytics categorization set example

When you create a categorization set, Relativity generates a **Category Set Result** field, which users can add to searches, views, and pivot profiles. If you force delete the categorization set, the Category Set Result field becomes blank. As a result, any saved searches referencing this field are blank, and any views using this field as a condition no longer list it.

3.3.2 Search terms reports example

Relativity generates a **Search Terms Results** field when you create a search terms report. You can use terms from the search terms report to create a persistent highlight set. If you force delete the search terms report, Relativity also deletes the **Search Terms Results** field, and the viewer no longer displays persistent highlights based on the search terms report. In this case, the persistent highlight set still references the **Search Terms Results** field, but it doesn't contain any results.

4 Creating a question object

Custodians can have multiple documents linked to them, but documents can have only one custodian. This is a one-to-many relationship – many documents to one custodian.

A reviewer may have one or many questions about a document, and each question may be associated with one or many documents – another many-to-many relationship.

For such a case, you can use the following steps to build a question and answer object that functions as a conversation about a document.

1. Select the **Object Type** tab.
2. Click **New Object**.
 - **Name** - Question
 - **Parent Object Type** - Workspace
 - **Enable Snapshot Auditing On Delete** - Yes
3. Click **Save & Back**.

The new Object Type Question appears in the list.

4.1 Editing views

After creating a Question object type, browse through other tabs in the system to view and verify the impacted changes. To do this, edit the views within each tab to see which fields and layouts pertain to the object type.

If you already created a custodian object, you can skip this procedure and go to [Question object field layout creation on the next page](#).

To edit field and layout views:

1. Select the **Fields** tab, and then click **Edit View**. The View Information form opens.
2. Leave Name as **All Fields** to view all system fields that pertain to the Question object.

The screenshot shows a web interface for editing views. At the top, there are buttons for 'Cancel', 'Back', 'Next', and 'Save'. Below this is the 'View Information' section with the following fields:

- Name:** All Questions
- Order:** 1 (with a 'View Order' button)
- Visible In Dropdown:** Yes

Below the 'View Information' section is the 'Set Fields' section, which is divided into two columns:

- Available Fields:** A list of system fields including 'Allow Group By', 'Allow HTML', 'Allow Pivot', 'Allow Sort/Tally', 'Artifact ID', 'Associative Object Type', 'Auto Add Choices', 'Available In Field Tree', 'Available In Viewer', 'Created By', 'Created On', 'Enable Data Grid', 'Field Category ID', 'Field Source', 'Field Tree View', 'Fields', 'Filter Type', 'Formatting', 'Friendly Name', 'Highlight Sets', and 'Import Behavior'.
- Selected Fields:** A list of fields currently selected for the view, including 'Edit', 'Name', 'Field Type', 'Include in Text Index', and 'Is Relational'.

Navigation arrows are present between the two columns to move fields back and forth.

3. Select **Object Type** from Available Fields. Move Object Type to the Selected Fields column. Adjust its position using the Up arrow on the right-hand side.
4. Click **Save**.
5. Click **Show Filters**. In the Object Type field you can filter and view on the Question object.

After editing your field view, you must do the same for your layout view.

1. Select the **Layouts** tab.
2. Click **Edit View**.
3. Leave Name as **All Layouts** to view all system layouts that pertain to the Question object.
4. Select **Object Type** from the list of fields from the Available Fields column. Move the Object Type to the Select Fields column using the single blue arrow in the center. Adjust its position using the Up arrows on the right-hand side.
5. Click **Save**.
6. Click **Show Filters**. In the Object Type you can filter and view on Question.

4.2 Question object field layout creation

You have an object to store data, but you need question and answer fields to hold the information for that object. The question can be about a document, and a reviewer completes the answer field.

To add fields to the question object:

1. Select the **Fields** tab.
2. Filter the fields to show the **Question** Object Type.
3. Look for the **Name** field.
4. Click **Edit**, and then change the Name of the Name field to **Question**.
5. Click **Save**.

To create an answer field:

1. Click **New Field**.
2. Customize the Answer field as follows:
 - **Name** - Answer
 - **Object Type** - Question
 - **Field Type** - Long Text
 - **Open to Associations** - Yes
3. Click **Save**.

You must also create a multiple object field on the Document object to connect the fields you previously created. To create the multiple object field:

1. Click **New Field**.
2. Customize the Questions field as follows:
 - **Object Type** - Document
 - **Name** - Questions
 - **Field Type** - Multiple Object
 - **Associative Object Type** - Question
3. Click **Save**.

4.3 Question views

You can use the Question object to create views and layouts to visualize the object fields.

To add new questions:

1. Select the **Question** tab.
2. Click **New Question**. Type a question in the field and save it.

There is no way to answer the question yet, so you must add the Answer field to this layout. To add the Answer field:

1. Click the **Layouts** Tab, and then filter on the **Question** object type.
2. Select the **Question Layout**.
3. Click **Build Layout**.
4. Drag and drop the **Answer** field into the Default Category.
5. Click **Save**.

The Answer field appears on the layout.

You must also add an associative object list to add the documents view to the layout. To add the documents view to the layout:

1. Click the **Add Category** drop down > **Add Object List**.
2. Ensure the list contains the following:
 - **Object** - Questions
 - **View** - Documents
 - **Link View** - Documents
 - **Links to Popup** - No
 - **Friendly Name** - Questions
3. Click **Save**.

You must edit the Question view to include the associative object list. To edit the Question view:

1. Select the **Views** tab, and then filter Object Type to Question.
2. Click **Edit** for the **All Questions** view.
3. Click **Next**.
4. Double-click the **Answer** field in the left column to move it to the right, and then click **Save**.

While in the Views tab, you can create views for documents without answers to Questions or documents with Questions.

5. Go to the **Layouts** tab, and then select the **Default** document layout.
6. Click **Build Layout**.
7. Click the **Add Category** drop down > **Add Object List**.
8. Ensure the list contains the following:
 - **Object** - Questions
 - **View** - All Questions
 - **Link View** - All Questions
 - **Links Point to Popup** - No
 - **Order** - 10
9. Click **Save**.

Note: By selecting **Yes** in the **Links Point to Pop-up** drop-down menu, Relativity opens a dialog beside the document view. By selecting **No**, Relativity navigates away from the document and redirects the reviewer to another page.

To view the updates to the layout:

1. Click the **Documents** tab and open a document.
2. Select the **Basic layout** from the coding drop down menu. The Question section appears.
3. Click **New** to add a Question and answer to this document.
4. Return to the document list.
5. Click **Edit** and include the **Q&A** and the **Q&A::Answer** field.
6. Click **Done**.

The documents and their corresponding questions and answers are listed. You can create layouts to show only the questions without answers for higher level reviewers. You can add questions and answers to layouts for reviewers to note comments or answers regarding certain documents.

5 Building Media Tracker with Relativity Dynamic Objects

Media Tracker is an application you can build using Relativity Dynamic Objects (RDOs). With Media Tracker, you can track media received from vendors, clients, and opposing counsel. After you build and deploy the application in a workspace, you can manually input the media and related metadata.

Complete the following steps to create a Media Tracker application and then import it into Relativity workspaces.

To build Media Tracker with Relativity Dynamic Objects:

1. [Create a new application](#).
2. [Link and create object types](#).
3. [Update and create fields](#).
4. [Update views](#).

5. [Build layouts.](#)
6. [Export the Media Tracker application.](#)

5.1 Create a new application

Create a new application in the target workspace. To create a new application:

1. Select the **Relativity Applications** tab.
2. Click **New Relativity Application**.
3. Enter **Media Tracker** as the new application name.
4. Click **Save**.

The Media Tracker application information page displays.

5.2 Link and create object types

Next, add object types to the application from the Media Tracker application information page. For more information, see [Editing Relativity Objects](#).

1. Click **Link**, and then select **Document** under the Object Type section.
2. Click **Add**, and then click **Set**.
3. Click **New** under Object Type, to create the following new object types:

Note: For each new object type, set Parent Object Type to **Workspace** and Relativity Applications to **Media Tracker**.

- **Media Received** - stores information about each delivery including a scanned PDF copy of the letter received.
- **Source Media** - serves as a record of each disk or hard drive received.
- **Processed Media** - records the volume of data on the disks or the hard drive and relate back to the documents in the database.

The four object types appear on the Media Tracker application information page.

5.3 Update and create fields

Create and edit fields for the Media Tracker application. See the Admin guide for more information on Fields.

1. Click the **Fields** tab in the target workspace.
2. Select **All Fields** from the View drop-down menu.
3. Click **Show Filters**.
4. Type **Name** in the **Name** column filter.
5. Press **Enter**.
6. Click **Edit** to rename the **Name** fields for the following object types:
 - **Source Media** - change name to **Media ID**.
 - **Media Received** - change name to **Media Received ID**.
 - **Processed Media** - change name to **Processed Volume**.

7. Click **Save** to apply each name change.
8. Click **New Field** to create the following fields. The options in the Field Information section must be completed first before the remaining options are displayed. For each field, set the object type, name, and field type as specified in the table below. Set Relativity Applications to **Media Tracker**, and leave the rest of the options as the default values.

Object Type	Name	Field Type
Media Received	Letter Date	Date
Media Received	Letter From	Fixed-Length Text : 255
Media Received	Letter Scan	File
Media Received	Letter Title	Fixed-Length Text : 255
Media Received	Letter To	Fixed-Length Text : 255
Media Received	Received From	Single Choice
Media Received	Received On	Date
Media Received	Type	Single Choice
Source Media	Custodians	Multiple Choice; Set Open to Associations to Yes .
Source Media	Media Scan	File
Source Media	Media Type	Single Choice
Source Media	Media Received	Single Object with Associative Object Type: Media Received
Source Media	Source Media Storage Location	Fixed-Length Text : 255
Processed Media	Processed By	Single Choice

Object Type	Name	Field Type
Processed Media	Processed Media Storage Location	Fixed-Length Text : 255
Processed Media	Source	Single Object with Associative Object Type: Source Media
Document	Processed Volume	Single Object with Associative Object Type: Processed Media

5.4 Update views

In the Relativity Applications tab, go to the Media Tracker application information page. Using the new fields, you can now update the application's views. See the Admin guide for more information on Layouts.

1. Click **Link**, and then select the **Document** view under View.
2. Click **Add**, and then click **Set**.

Note: Adding the Document view requires adding all fields referenced by the Document view to the application.

3. Click **Edit** to update the following views under the View section. For each view, set the fields as listed below. Click **Save** to apply the view settings.

- **Name** -All Media Received
 - **Object Type**- Media Received
 - **Fields**
 - Edit
 - Security
 - Media Received ID
 - Type
 - Received From
 - Received On
- **Name**- All Source Media
 - **Object Type**- Source Media
 - **Fields**
 - Edit
 - Security
 - Media ID
 - Media Type
 - Media Received
 - Source Media Storage Location
 - Custodians

- **Name-** All Processed Media
 - **Object Type-** Processed Media
 - **Fields**
 - Edit
 - Security
 - Processed Volume
 - Processed Media Storage Location
 - Processed By
 - Source::Custodians

5.5 Build layouts

Finally, you can build the layouts that drive the Media Tracker workflow. See the Admin guide for more information on Layouts.

To build a layout for Media Tracker:

1. Click **Edit Layout Information: Media Tracker** to add order in drop-down values (using increments of 10) to each of the following layouts.
 - **Media Received Layout** (Object Type of Media Received)
 - **Source Media Layout** (Object Type of Source Media)
 - **Processed Media Layout** (Object Type of Processed Media)
 - Click **Save**.
2. Build the **Media Received Layout** using the following steps:
 - Click **Build Layout** in the Layout console.
 - Click **Add Category** and enter Media Received. Click **Save**.
 - Drag and drop the following fields into the Media Received category:
 - **Received From**
 - **Received On**
 - **Type**
 - Click **Add Category** and name the new category **Letter Information**.
 - Drag and drop the following fields into the Letter Information category:
 - **Letter From**
 - **Letter To**
 - **Letter Date**
 - **Letter Title**
 - **Letter Scan**
 - Click the **Add Category** drop down > **Add Object List**. Enter the following:
 - **Object** - Source Media - Media Received
 - **View**- All Source Media
 - **Link View**- All Source Media
 - **Links Point to Popup**- No
 - **Friendly Name**- Source Media - Media Received
 - Click **Save**.

3. Build the **Source Media Layout** using the following steps:

- Click **Build Layout** in the Layout console.
- Click **Add Category** and enter Media for the name.
- Drag and drop the following fields into the Media category:
 - **Media ID**
 - **Media Received**
 - **Media Type**
- Click **Add Category** and name it **Custodians**.
- Drag and drop the following fields in the Custodians category:
 - **Source Media Storage Location**
 - **Media Scan**
- Click the **Add Category** drop down > **Add Object List**. Enter the following:
 - **Object**- Processed Media - Source
 - **View**- All Processed Media
 - **Link View** - All Processed Media
 - **Links Point to Popup**- No
 - **Friendly Name** - Processed Media - Source
- Click **Save**.

4. Build the **Processed Media Layout** through the following steps:

- Click **Build Layout** in the Layout console.
- Click **Add Category** and enter Processed Media for the name. Click **Save**.
- Drag and drop the following fields into the Processed Media category:
 - Processed Volume
 - Processed By
- Click **Add Category** and name it **Source Media**.
 - Drag and drop the Source field into the Source Media category.
- Click **Add Category** and name it **Storage Location**.
 - Drag and drop the Processed Media Storage Location field into the Storage Location category.
- Click the **Add Category** drop down > **Add Object List**. Enter the following:
 - **Object** - Document - Processed Volume
 - **View**- Processed Documents (You may have to create this view. Set the **Processed Volume** field you created as the field for this view.)
 - **Link View** - Processed Documents
 - **Links Point to Popup**- No
 - **Friendly Name** - Document - Processed Volume
- Click **Save**.

5.6 Export Media Tracker application

You can now export the Media Tracker application. When you export the application you can also import the application into other workspaces.

1. Click **Export Application** on the Application Console.
2. Save the application as an XML file or a RAP file to a folder on your machine.
3. Install the application to a workspace or to the Application Library from Home.

Note: Media Tracker is only one way that Relativity applications can support your workflow and data management needs. After you create this sample application and become familiar with its functionality, try modifying its views, field names, and/or layouts to best fit your needs.

6 Creating a tab to bookmark an object

You can create new a tab that links directly to any web page or a location within Relativity. This is useful for bypassing list views or for going to specific locations.

If the target is a Relativity page or object, you need the ArtifactID.

To retrieve the ArtifactID:

1. Navigate to the page or object From within a workspace. System admins may navigate to pages or objects in the Admin Mode area. The ArtifactID appears in the browser's URL for that page.
2. The ArtifactID value follows the string beginning with **ArtifactID=**.

In the screen below, this text is ArtifactID=1035255 and ArtifactID value is 1035255.

To create a bookmark tab:

1. Select the **Tabs** tab, and then click **New Tab**.
The New Tab form appears with required fields in orange and optional fields in gray.
2. Complete the following fields:
 - **Name** - the name for the new tab. The name must be between 1 and 50 characters.
 - **Order** - the numerical position of the tab. The lower the Order value is, the more the new tab appears to the left in the tab strip. Click **View Order** to display a list of active tabs and their current order.
 - **Link Type** - select **External** from the menu. The **Link** field displays below the **Parent** field.
 - **Parent** - optionally specifies the parent workspace tab for this new tab to appear under. Leave as **Select...**, the default value, for the new tab to appear as a separate tab in the tab strip.
 - **Link** - enter one of following options:
 - The URL of a non-Relativity target webpage. For example, enter **http://www.example.com** or **http://www.example.com/Instructions**.
 - The **ArtifactID** of a Relativity page or object, specified in this format: **ObjectArtifactIdentifier=identifier**, where *identifier* is the ArtifactID.
For example, in the dialog below, the Link value is **ObjectArtifactIdentifier=1035255**
 - **Is Default** - select **Yes** to set this tab as the default when a reviewer logs in; otherwise, select **No**.
 - **Relativity Applications** - click  to associate this tab with an application.
3. Click **Save**.
The tab appears immediately in the tab strip.

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