



Starter Template Guide

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1 Overview

Note: The Starter Template has been replaced by the Quick Start Template. While you can still use the Starter Template in your environment, it does not have the full functionality of the Quick Start Template.

You can use the Relativity starter template installed with Relativity to customize your workspace for standard document review.

Note: This template isn't required to use Relativity; it's an option for logically customizing your Relativity environment.

1.1 Recommended pre-work

Before getting into the starter template, we recommend you familiarize yourself with/complete the following:

- Relativity Admin training - <https://www.relativity.com/ediscovery-training/live/relativity-admin-essentials-1/>
- See the Environment Optimization guide for more information on Infrastructure setup.
- See the Processing User Guide for more information on Data processing.
- See the Admin guide for more information on creating a client, matter, and workspace (use the Relativity starter template to create your workspace).

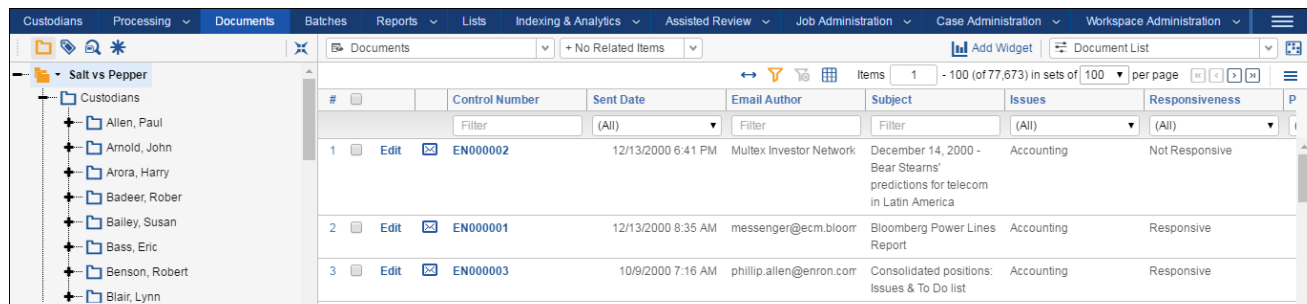
All aspects of workspace setup are found in the Admin guide. Use this guide to get a deeper understanding of certain caveats with case setup. Each section discusses different aspects of case setup followed by references that outline the fields, views and layouts that make up the template. This template is just a starting point for creating your own workspace template.

2 Tab structure

The tab structure in this template is organized into the following workflows: Documents, Review batches, Reporting, Case admin, Index admin, Job admin, Application admin, Workspace admin, and Persistent lists.

2.1 Documents

The Documents tab in the starter template provides reviewers with access to workspace documents. From here, a reviewer can click on any document to work with it in the viewer. See the User guide for more information on document review.



2.2 Review batches

The Review Batches tab in the starter template provides users with access to batches of documents. A user can check out those batches, and begin a review on the documents they contain. See the User guide for more information on checking out batches.

2.3 Layouts

The starter template includes the following layouts that a reviewer can use to code documents with. These layouts are available based on administrator role, such as Legal Team Admin, Case Team Admin, or Workspace Admin.

Document Metadata – This layout contains all of the metadata fields and is generally read only.

First Pass Review – This layout contains basic review fields.

Second Pass Review QC – This layout is for confirmation of first pass decisions and checks.

Issue Coding – This layout is for review purposes when assigning categories.

Privilege Log – This layout updates information for privilege log purposes based off of responsive documents.

Inline Tagging - This layout is for inline tagging.

Deponent / Witness Kit - This layout is for depositions.

2.4 Reporting

The Reporting tab in the starter template provides options for working with Search Terms Reports, Summary Reports, Pivot Profiles, and Domains.

2.4.1 Search terms reports

Search terms reporting provides a breakdown of document count per search item. Keyword searching is often used as a method of filtering the initial dataset. Use those terms or search parameters in the search terms report to see which documents return which terms. You can then prioritize certain groups of documents for review.

The template doesn't contain any pre-made reports. You can create a report based on terms related to your case. Remember that you need to create a dtSearch first before creating the report. See the Admin guide for more information on creating a search terms report.

2.4.2 Summary reports

Summary Reports provide aggregate tallies of field values. These reports are based on an optional grouping criteria and the fields to be tallied. Your workspace contains one default summary report called **Coding by Custodian**.

This summary report provides a basic tally of a familiar field and common review task. Click the **Edit** button in the summary information screen to view its settings:

| Summary Report | Fields |
|---------------------------|--|
| Designations by Custodian | Group By: Custodian Report on Subfolders: Yes Columns: -Designation: Non Responsive -Designation: (not set) -Designation: Not Sure -Designation: Responsive -Designation: Privilege |

You can edit the settings of this, and any additional summary report you create, at any time during the review process.

2.4.3 Pivot profiles

Pivot Profiles allow you to create, save, and edit custom Pivot settings. You can then apply these Pivot profile settings while using Pivot in the data set. See the Admin guide for more information on Pivot profiles.

By default, the starter template includes the following pivot profiles:

- **Tally of File Types** - returns a grid of the types of files in the workspace
 - Group By... Relativity Native Type
 - Pivot On... <Total Only>
- **Issues Related to Custodians** - returns a pie chart of issue by custodian
 - Group By... Custodian - Single Choice
 - Pivot On... Issue Designation
- **Issues Timeline** - returns a grid of dates and how many issues fall within those dates
 - Group By... Sort Date
 - Pivot On... Issue Designation
- **File Types Related to Custodians** - returns a pie chart of file types by custodian
 - Group By... Custodian - Single Choice
 - Pivot On... Relativity Native Type

2.4.4 Domains

Use the Domains tab to create a new domain. Use the Domains tab to:

- Find domains that might contain privileged information such as law firms and assign accordingly
- Assign lower priority to spam email and personal email addresses; bulk code or assign to entry level reviewers
- Prioritize emails from key domains
- Utilize Author and Recipient domains with Pivot to determine conversation relationships

After domain parsing is complete you'll see a tab with a list of the domains. Click on a domain to bring up the list of documents associated with the domain. This can be useful for a number of different workflows.

2.5 Case admin

The Case Admin tab in the starter template provides options for working with the following admin functions: Batch Sets, Markup Sets, Persistent Highlight Sets, Production Sets, Scripts, and Transform Sets.

2.5.1 Batch sets

Batching is useful way to secure which documents a user is able to view. Batches can also help in creating a workflow. However, batches don't carry over with the template. As a result, you need to create new batches for each workspace. The template contains views setup to work with batches.

My Checked-Out Batches and **My Checked-Out Batches Not Reviewed** are views setup for first-level reviewers to view only their assigned documents or documents they have checked out.

Before you batch documents, you need to create a batch source. The batch source is a saved search containing documents to batch. You can then create a batch based on a specified parameter of these documents. Batches might be based on:

- Custodians
- Clusters
- Time Periods

Securing a batch set applies security only to the batches themselves, not to their included documents. See the Admin guide for more information on adding batch sets and batches.

2.5.1.1 View table

The template contains a number of different views, each with its own fields and conditions.

2.5.1.2 Workspace template views

The table below lists views found in the workspace template, including a description of purpose and the conditions found in each.

| Object | View Name | Description | Conditions | Selected Fields | Sort order |
|----------|---|--|--|--|------------------------------|
| Document | Documents | System default view of all documents loaded in the system | None | Edit, File Icon, Doc ID Beg, Doc ID Beg Attach, Doc ID End Attach, Custodian, Document Extension, Designation, Email From, Email To, Email CC, Email Subject, Author, Title, Parent Date, Date Sent, Date Last Modified | None |
| | Documents - All Metadata | View of the documents loaded in the system with all metadata fields showing | None | Control Number, Group Identifier, File Name, File Type, Document Extension, File Size, Original Folder Path, MD5 Hash, Sort Date, Email From, Email To, Email CC, Email BCC, Email Subject, Date Received, Date Sent, Number of Attachments, Attachment Name, Delivery Receipt, Conversation Index, Title, Date Last Modified, Date Created, Date Last Printed | None |
| | My Checked-Out Batch | Displays all the logged in user's checked out documents | Batch these conditions – Batch::Assigned To is logged in user AND Batch::Status any of these In Progress | Edit, File Icon, Doc ID Beg, Designation, Doc ID Beg Attach, Doc ID End Attach, Custodian, Document Extension, Email From, Email To, Email CC, Email Subject, Author, Title, Parent Date, Date Sent, Date Last Modified | Parent Date then Doc ID Beg. |
| | My Checked-Out Batch Items Not Reviewed | Displays all the user's checked-out documents not coded in designation field | Batch These Conditions – Batch::Assigned To is logged in user AND Batch::Status is any of these: In Progress) AND Designation is not set | Edit, File Icon, Doc ID Beg, Designation, Doc ID Beg Attach, Doc ID End Attach, Custodian, Document Extension, Email From, Email To, Email CC, Email Subject, Author, Title, Parent Date, Date Sent, Date Last Modified | Parent Date then Doc ID Beg. |

| Object | View Name | Description | Conditions | Selected Fields | Sort order |
|--------|---------------------------------------|---|---|---|-----------------------------|
| | Responsive Documents | Displays a list of documents that have been reviewed. | Designation is Responsive | File Icon, Doc Beg ID, Custodian, Email Subject, Date Sent | Parent Date then Doc ID Beg |
| | Unassigned and Not Reviewed Documents | Displays a list of documents not assigned. | Batch these conditions – Batch::Assigned To is not set AND Designation is not set | Edit, File Icon, Doc ID Beg, Custodian, Date Sent, Email From, Email To, Email Subject | Parent Date then Doc ID Beg |
| | Unreviewed Documents | Displays a list of documents that have not been reviewed. | Designation is not set | Edit, File Icon, Doc ID Beg, Custodian, Date Sent, Email From, Email To, Email Subject | Based on Parent Date |
| | Technical Issues | Displays a list of documents that have been coded as having a technical issue designation | Responsive Designation is Technical Issue | Edit, File Icon, Control Number, Group Identifier, Document Extension, Sort Date, Email Subject, Email From, Email To, Email CC, Title, Date Last Modified, Responsive Designation, Privilege Designation Confidential Designation, Issue Designation | None |
| | Redacted Documents | Displays a list of documents that have redactions applied. | Markup Set – Review any of these Has Redactions | Edit, File Icon, Doc ID Beg, Custodian, Designation, Markup-Set Review | None |
| | Issue Log | Displays a list of documents that have been coded with an issue. | Issue Designation | File Icon, Doc ID Beg, Email From, Email To, Email CC, Email Subject, Designation, Issue | None |

| Object | View Name | Description | Conditions | Selected Fields | Sort order |
|--------|---------------------------|---|-----------------------------------|--|----------------------|
| | Privilege Log | Displays a list of documents that have been coded as privileged. | Privilege Type is set | Edit, File Icon, Doc ID Beg, Designation, Custodian, Email From, Email To, Email CC, Emails Subject, Author, Title, Parent Date, Privilege Type, Privilege Description. | Based on Parent Date |
| | Production Documents | Displays a list of documents where the Bates Beg field has been set. | Bates Beg is set | Edit, File Icon, Control Number, Production::Begin Bates, Production::End Bates, Production::Begin Attachment, Production::End Attachment, Production::Has Redactions, Production::Production Type, Sort Date, Email Subject, Email From, Email To, Responsive Designation, Privilege Designation, Confidential Designation, Issue Designation | Bates Beg |
| | Deposition / Witness Kits | Displays a list of documents where Deponent / Witness Kit field is not set. | Deponent / Witness Kit is not set | Edit, File Icon, Control Number, Group Identifier, Deponent / Witness Kit, Sort Date, Email Subject, Email From, Email To, Email CC, Title, Responsive Designation, Privilege Designation, Confidential Designation, Issue Designation | Sort Date |
| | Admin View | Displays system admin view of documents loaded in the system | None | Edit, File Icon, Control Number, Group Identifier, Deponent / Witness Kit, Sort Date, Email Subject, Email From, Email To, Email CC, Title, Responsive Designation, Privilege Designation, Confidential Designation, Issue Designation | None |

| Object | View Name | Description | Conditions | Selected Fields | Sort order |
|-------------|-------------------------|----------------------------------|------------------------|---|------------|
| Native Type | All Native Types | Displays on the Native Types tab | None | Edit, Name, Imaging Method, Category (Basic), Restricted From Imaging By Default Prevent Native Download | |
| | Restricted Native Types | Displays on the Native Types tab | No conditions are set? | Edit, Name, Imaging Method, Category (Basic), Restricted From Imaging By Default, Prevent Native Download | None |

2.5.2 Markup sets

Markup sets are securable sets of highlights and redactions. Reviewers use markup sets to apply highlights and redactions to documents in the Viewer. See the Admin guide for more information on Markup sets.

2.5.3 Persistent highlight sets

Persistent Highlight Sets are reusable, transferable sets of persistent highlight parameters. You can select Persistent Highlight Sets in the Viewer to assist in document review. See the Admin guide for more information on Persistent highlight sets.

2.5.4 Production sets

When you want to produce documents in a case workspace, you can create a production set that defines the markup set for redactions, the document numbering, the appearance of the numbering, and other settings. Relativity uses these settings when running the production. You can then view the produced images in the Core Reviewer Interface by selecting Production mode and the production set.

See the Admin guide for more information on adding a production set.

2.5.5 Scripts

Relativity provides scripts as a way to manipulate or verify data. For example, a Parent date field might not be something a vendor can create from processing software; yet it's required to sort family groups by date.

To complete this task, you can use a Relativity Script named **Propagate Sent Date to Family Documents**. It takes the sent date field from emails, copies it to a parent date field, and passes the parent date field to all items of the family group, family groups will remain in order during sorting. If there isn't a parent document with a sent date such as loose files, you'll need to copy another date field over to the parent date field.

Below are some example scripts you might want to add to your workspace.

| Script | Description |
|---|--|
| Reviewer Statistics | Reports on the efficiency of reviewers over the specified date range. The returned statistics provide a count on how many documents were reviewed over a certain period of time. |
| Propagate Sent Date to Family Documents | Sets all email family documents to the same sent date as their parent documents in the case. |

See the Admin guide for more information on Library scripts.

2.5.6 Transform sets

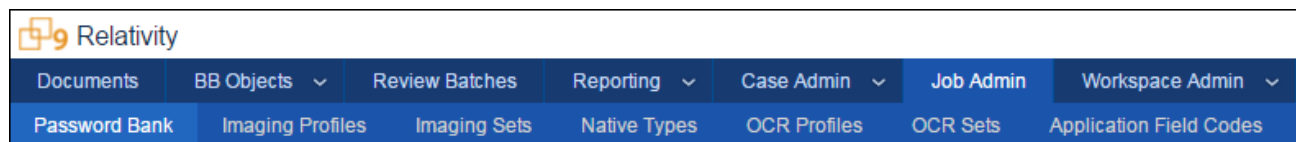
Transform Sets read through selected fields in a workspace, perform a defined process, and writes the output to other fields or object types. You can create a new transform set in your workspace that pulls from a source field and populate a destination field with the results. In Relativity, the transform set handlers are:

- Domain Parsing - takes field with email addresses, strips out the domain information, and writes it to a new field. For example, the address yourname@relativity.com becomes relativity.com.
- Conversation Index Parsing extracts the first 44 characters of an email thread conversation index to create a relational field with the same number.

See the Admin guide for more information on Transform sets.

2.6 Job admin

The Job Admin tab in the starter template provides options for working with the following jobs: Password Bank, Imaging Profiles, Native Types, Imaging Sets, OCR Profiles, OCR Sets, and Application Field Codes.



2.6.1 Password bank

The Password Bank is a password repository used to decrypt certain password-protected files during inventory, discovery and basic and native imaging. By creating a password bank, you can have Relativity run passwords against each encrypted document until it finds a match. Likewise, when you run an imaging job, mass image, or use image-on-the-fly, the list of passwords specified in the bank accompanies that job so that encrypted files are imaged in that job.

The password bank potentially reduces the number of errors in each job and eliminates the need to address password errors outside of Relativity.

For more information, see the Admin guide.

2.6.2 Imaging profiles

An imaging profile controls the settings used to image a group of documents. You can convert documents to black and white TIFF files or colored JPEG files. After you create a profile, you can use it in multiple imaging sets, edit the profile settings, and set permissions on it. Imaging profiles, as well as any updates to the default profile, are included in workspace templates.

See the Admin guide for more information on Imaging profiles.

2.6.3 Imaging sets

An imaging set consists of a saved search containing the documents that you want to image and an imaging profile. See the Admin guide for more information on Creating an imaging set.

2.6.4 Native types

On the Native Types tab, you see a list of file types that Relativity supports. Reference this list when selecting file types that you want to restrict from imaging. The RelativityDesktop Client also supports the same list of file types.

See the Admin guide for more information on Native types.

2.6.5 OCR profiles

An OCR Profile is a saved, reusable set of parameters that you use when creating an OCR Set. See the Admin guide for more information on Creating an OCR profile.

2.6.6 OCR sets

Use the OCR Sets tab to submit groups of documents defined by a data source or production to be OCR'd based on the settings defined by the OCR Profile. See the Admin guide for more information on Creating an OCR set.

2.6.7 Application Field Codes

Application Field Codes is how Relativity refers to fields that Microsoft documents use to store document data. For example, [Date] is a field code in Microsoft that shows the date a document is created. Excel and PowerPoint refer to these fields as header and footer, Word refers to them as field codes, and Visio refers to them as fields. But for simplicity, Relativity refers to them as field codes, regardless of which Microsoft application document you're viewing. See the Admin guide for more information on Creating Application Field Codes.

2.7 Workspace admin

The Workspace Admin tab in the starter template provides options for working with the following features in Relativity:

- See the Admin guide for more information on Workspace details.
- See the Relativity objects guide for more information on object types.
- See the Admin guide for more information on fields.

- See the Admin guide for more information on choices.
- See the Admin guide for more information on views.
- See the Admin guide for more information on tabs.
- See the Admin guide for more information on History.
- See the Admin guide for more information on user status.

2.7.1 Search indexes

Use the Search Indexes tab to create and edit dtSearch and Analytics indexes.

Your database automatically creates a keyword search index. You can also create the structure for a dtSearch Index in the starter template. Use a dtSearch index to perform proximity searches, stemming, and other advanced searching operations not available in Keyword Search. You can also build a list of custom noise words and an alphabet file in your starter template to be used throughout your instance.

Things to remember:

- If the dtSearch agent encounters a network-related error during the build process, it executes up to three retry attempts at 20-second intervals.
- You can edit a dtSearch alphabet file directly in Relativity before building the index. The alphabet file is displayed in the lower-right corner of a dtSearch index's page and is fully editable. You can edit the alphabet file to enable searching for a single character and symbols.
- You can safely estimate that any dtSearch index built is approximately 25-30 percent of the size of the text you are indexing.
- If you overlay data onto existing records, you can't use an incremental build to update your dtSearch index. An incremental build only looks for new documents in the searchable set. Previously indexed records aren't re-indexed by an incremental build. You must execute a full build to add the newly overlaid data to the index.

See the Admin guide for more information on search indexes.

2.7.2 Relativity applications

Applications allow you to perform specialized functions in a workspace. You can configure new objects or link to existing objects for use with your application. See [Creating an application](#) in the Developers site. See the developer Application Deployment System guide for more information on creating an application.

2.7.3 Custom pages

Custom pages allow you to create custom layouts and dynamically display information stored in a Relativity database. They enhance application flexibility by providing the means to present or manipulate data in Relativity using formats other than layouts, views, or other Dynamic Objects.

See the Custom Pages section in the Relativity Developer's site for more information.

2.7.4 Choices for Assisted Review Designation:

Choices allow reviewers to code documents in viewer layouts.

The template has two choices configured by default.


- **Responsive** - use this choice to tag documents as relevant to the case.
- **Non-Responsive** - use this choice to tag documents that are irrelevant to the case.

Some cases involve multiple issues relating to the case. The starter template also includes two placeholder issue choices configured by default:

- **Issue - A** - use this choice to tag documents as relevant to Issue A.
- **Issue - B** - use this choice to tag documents as relevant to Issue B.

You can rename these issues to more accurate terms related to a specific case.

2.8 Saved searches

You can access saved searches from the Documents tab with the  button in the upper left corner of Relativity.

The starter template includes the following saved searches secured for system admins only:

| Folder name | Saved search name | Description | Field | Operator | Value | Boolean operator |
|----------------|----------------------------|---|--|---------------------------------|-------------|------------------|
| Admin Searches | All Documents | Returns all documents loaded into the workspace. | none | none | none | N/A |
| | Extracted Text Only | Returns only documents with extracted text. | Extracted Text | is set | none | N/A |
| | Analytics - Searchable Set | Returns all documents with extracted text under 30720 bytes. | Extracted Text Size | is less than | 30720 | N/A |
| | Analytics - Training Set | Returns all documents with extracted text over .2 bytes but less than 2048 bytes. | Extracted Text Size Extracted Text Size | is greater than is less than | 0.2 2048 | AND |
| | Produced Documents | Returns only documents that have beginning Bates numbers | Bates Beg | is set | none | N/A |

3 Importing and setup

Loading data is one of the first and most important parts of the system admin role. Performing this incorrectly can negatively impact subsequent processes and complicate document review.

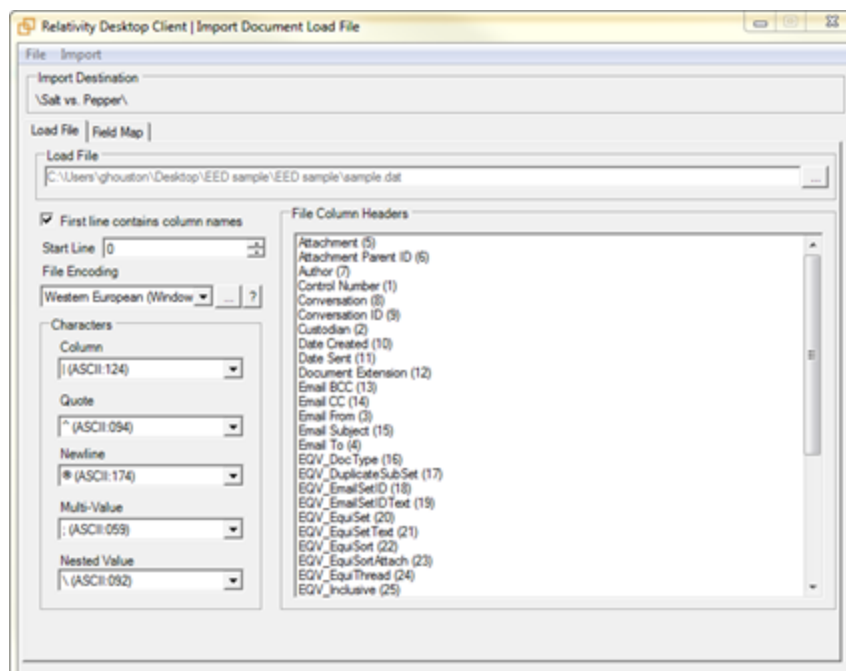
The Relativity starter template is built with a strong core group of fields but may not contain every field your case might need.

All importing functionality is handled by the Desktop Client. You can download this utility from the Workspace details tab in Relativity.

3.1 Fields

To begin the loading process, first check to see that you have fields created for all of your data. Relativity offers a variety of field options. Determining the most appropriate field type for your data makes your database more intuitive and efficient. See the Admin guide for more information on the Relativity Desktop Client.

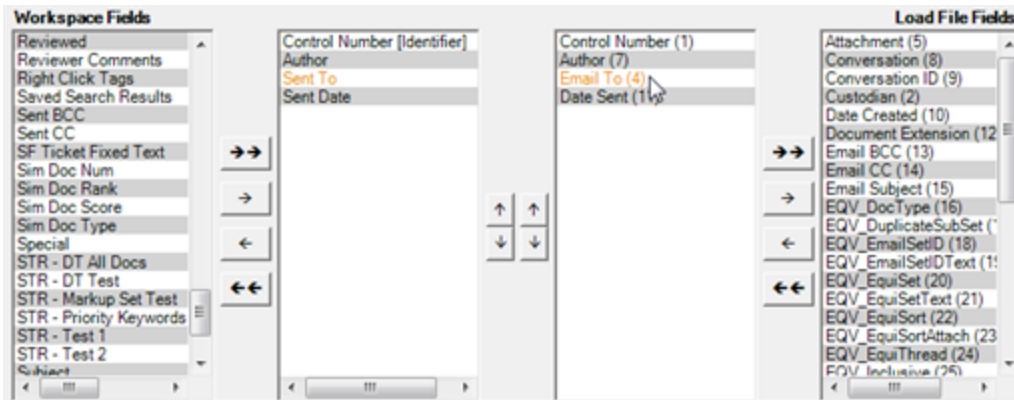
After you select your load file, you can change the delimiters on the left. The first row of your load file appears in the window to the right. If all delimiters are set with the correct specifications, then all the field names should appear in one column.



Click on the **Field Map** tab to line up your fields to load.

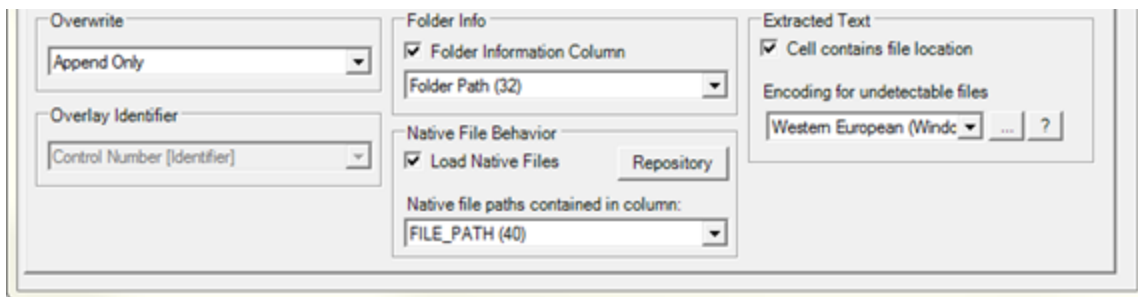
- The most important field is a unique identifier field. The starter template uses the Beg Doc ID field.
- The identifier field must be unique for each record and is required as a part of every load or overlay.
- After creating a field you can change its name and other properties, but you can't change its type.

- Load file field names do not have to match database field name. You can load a field named Control Number into the template Beg Doc ID field. Likewise, Email BCC field might be named BCC in the load file.

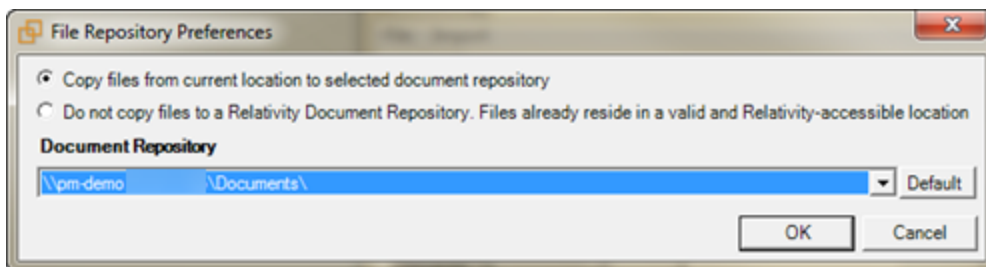


You can choose to append new data or overlay data on already existing records by changing the settings below the field lists. If you overlay records, you must select the identifying field for the overlay. It can be any fixed-length text field that is indexed. However, the best method for overlaying data is to use the unique identifier field.

You enter the browser folder information and native file paths separately. Select the check box next to the fields to indicate that you have data to load for a folder and file path, then choose the appropriate fields. The folder path is the location within the folder hierarchy that the document appears in Relativity. The file path connects the viewer to the native file.



Use the Advanced button under Native File Behavior to copy the native files from a disk or link to files already on a image server.



The extracted text option is where you indicate that the extracted text is available in a separate file. Only a file path is needed if this is checked. If this isn't checked the extracted text data is expected in the load file.

If errors occur, the Desktop Client produces an error file listing all problematic records, and no part of those records is loaded into Relativity. After the initial load is complete, click **OK** to save the error files, if needed. Edit the error file and then try to load the records again. See the Relativity Desktop Client guide for a list of errors and fixes. Because Relativity creates a separate file of only records with errors and doesn't load them, you can edit the error load file instead of the large and sometimes cumbersome original load file.

Things to remember:

- At this point you can still create and add fields. If you find one in the load file that was missed in the database, go ahead and open Relativity and add a field or edit a field to match the data to load. Go to the File menu and select Refresh to see the field in the Relativity Desktop Client list. The new field appears at the bottom of the field list; it is not placed alphabetically.
- The Document Identifier must be unique. Only the first occurrence is loaded if there are duplicates in your load file. Choose Overlay to add more data to existing records. The Overlay must have the Document Identifier with the new data.
- You cannot change the field type for fields already created. You need to rename the current field and make a new one with the required field type.
- Not all fields need to be loaded. Leave the fields you don't want loaded in the outside column.
- Don't start the load process while creating fields. Be sure to only create fields before or after loading data.
- Fixed Length text fields should not be greater than 500 characters, larger field sizes might affect database performance.
- Be sure you have permissions to load to the selected folder.
- When overlaying a multi-choice field the previous content of the record is overwritten not merged with new data.
- If for any reason a record is not able to be loaded the entire record is skipped. A record is never partially loaded.

3.2 Field list

Below is a breakdown of the fields found in the kCura template workspace, including type and a description. Fields can be added at anytime during the case but this standard set of fields should provide a solid foundation for your database. There are other fields visible in the case; however, those fields won't be populated until a later time. These are system fields or fields dependent on tasks that occur as you begin using the database.

Note: Family group is all items that are physically or electronically attached. A fax cover sheet and documents sent are a family group as well as an email and its attachments. The parent item is the email and the child items are the attachments to the email.

3.2.1 Extracted metadata fields

The following tables list document metadata fields included in the Relativity starter template. These lists don't include the system-level fields.

Extracted metadata fields accommodate document extracted text.

| Field Name | Type | Description | Group By | Pivot |
|------------------------|------------------|---|----------|-------|
| All Custodians | Multi-Object | All custodians (deduped and original) associated with a file (available only when Global Deduplication is enabled and duplicates are present). | | |
| All Paths/Locations | Multi-Object | All path fields (deduped and original) associated with a file (available only when Global Deduplication is enabled and duplicates are present). | | |
| Attachment Name | Long Text | Lists the file name(s) of each attachment to an email message, separated by semicolons, extracted from metadata. Only present on parent items | | |
| Categories | Multi-Choice | Category field extracted from the metadata of the file by processing vendor | Y | Y |
| Control Num Beg Attach | Fixed Length: 60 | Document ID of first document page of family group ***for imaged documents | | |
| Control Num End Attach | Fixed Length: 60 | Document ID of last page of family group *** for imaged documents | | |
| Control Num End | Fixed Length: 60 | Document ID end number for scanned/TIFFed documents based on page level numbering | | |
| Control Number | Fixed Length: 60 | Document ID beginning number for scanned/TIFFed documents based on page-level numbering | | |
| Created Date | Long Text | The date on which a file was created. | | |
| Created Time | Long Text | The time at which a file was created. | | |
| Custodian | Single Choice | User-assigned custodian passed to metadata extraction software or manually associated with scanned documents | | Y |
| Date Created | Date | Date and time from the Date Created property extracted by the metadata extraction software from the original file | | |
| Date Last Modified | Date | Date from the Modified property of a document, representing the date and time that changes to the document were last saved | | |
| Date Received | Date | Date and time an email message was received (according to original time zones) | | |

| Field Name | Type | Description | Group By | Pivot |
|-------------------------------|-------------------|--|----------|-------|
| Date Sent | Date | Date and time an email message (according to original time zones) was sent | | Y |
| Delivery Receipt | Yes/No | Created by the email application if the email author turned on the delivery receipt request notification. The value is either (True) or (False) depending on whether the email was registered as delivered to a recipient. | | |
| Document Extension | Fixed Length: 60 | Three-character extension of document that represents the file type to Windows Operating System created by metadata extraction software. | | Y |
| Document Title | Long Text | The title of a non-email document. This is blank if there is no value available. | | |
| Email BCC | Long Text | Recipients of blind carbon copies of email messages | | |
| Email CC | Long Text | Recipients of carbon copies of email messages | | |
| Email Created Date/Time | Date | The date and time at which an email was created. | | |
| Email Entry ID | Long Text | The unique Identifier of an email in an mail store. | | |
| Email From | Fixed Length: 320 | Author of the email message extracted by metadata extraction software | Y | Y |
| Email Has Attachments | Yes/No | The yes/no indicator of whether an email has children (attachments). | | |
| Email Folder ID | Long Text | The folder path in which a custodian stored an email. | | |
| Email Format | Single Choice | The indicator of whether an email is HTML, Rich Text, or Plain Text. | | |
| Email Last Modified Date/Time | Date | The date and time at which an email was last modified. | | |
| Email Modified Flag | Yes/No | The yes/no indicator of whether an email was modified. | | |
| Email Sent Flag | Yes/No | The yes/no indicator of whether an email was sent, versus saved as a draft. | | |
| Email Subject | Fixed Length: 255 | Subject of the email message extracted by metadata extraction software | | |
| Email To | Long Text | Recipients of email message extracted from email file by metadata extraction software | Y | Y |

| Field Name | Type | Description | Group By | Pivot |
|-------------------------|-------------------|--|----------|-------|
| Embedded Data Info | Fixed Length: 400 | Message indicating that there are tracked changes, hidden fields or data present in native file. Can be changed to HTML field in Relativity to provide warning to reviewers to check native file for data not available in viewer. | | |
| Excel Hidden Columns | Yes/No | The yes/no indicator of whether an Excel file contains one or more hidden columns. | | |
| Excel Hidden Rows | Yes/No | The yes/no indicator of whether an Excel file contains one or more hidden rows. | | |
| Excel Hidden Worksheets | Yes/No | The yes/no indicator of whether an Excel file contains one or more hidden worksheets. | | |
| Excel Pivot Tables | Yes/No | The yes/no indicator of whether an Excel file contains pivot tables. | | |
| Exceptions | Yes/No | "Y" for documents with issues while processing or exceptions that occurred during metadata extraction | | |
| Extracted Text | Long Text | The full, unformatted content of the document obtained either by extracting from electronic file or by OCR processing of scanned images | | |
| File Name | 255 | File name of the native file extracted as metadata | | |
| File Path | Fixed Length: 255 | The full path or relative path to the location of the physical file to be viewed in Relativity | | |
| Filesize | Whole Number | Size of the native file in bytes | | |
| Folder Path | Fixed Length: 255 | Path of original file not including file name. This may be the file hierarchy on the system. | | |
| Header | Long Text | Contents of the email message header extracted from metadata | | |
| Image Taken Date/Time | Date | The date and time at which an original image (e.g., document scan or .jpg) was taken. | | |
| Is Embedded | Yes/No | The yes/no indicator of whether a file is embedded in a Microsoft Office document. | | |
| Is Parent | Yes/No | The yes/no indicator of whether a file is not a child. | | |
| Keywords | Long Text | Keywords field extracted from the metadata of the native file | | |
| Last Accessed | Date | The date on which a loose file was last accessed. | | |

| Field Name | Type | Description | Group By | Pivot |
|---------------------------|-------------------|---|----------|-------|
| Date | | | | |
| Last Modified Date | Date | The date on which changes to a file were last saved. | | |
| Last Modified Time | Long Text | The time at which changes to a file were last saved. | | |
| Last Printed Date | Date | The date on which a file was last printed. | | |
| Last Printed Time | Long Text | The time at which a file was last printed. | | |
| Last Saved Date | Long Text | The date on which a file was last saved. | | |
| Last Saved Time | Long Text | The time at which a file was last saved. | | |
| Lotus Notes Other Folders | Long Text | A semi-colon delimited listing of all non-primary folders that a Lotus Notes message or document was included. | | |
| MD5 Hash | Fixed Length: 32 | Unique identifier created for electronic file or email generated by metadata extraction software and used for deduplication. This algorithm isn't available for deduplication scanned images. | | |
| Meeting End Date | Long Text | The date on which a meeting item in Outlook or Lotus Notes ended. | | |
| Meeting End Time | Long Text | The time at which a meeting item in Outlook or Lotus Notes ended. | | |
| Meeting Start Date | Long Text | The date on which a meeting item in Outlook or Lotus Notes started. | | |
| Meeting Start Time | Long Text | The time at which a meeting item in Outlook or Lotus Notes started. | | |
| Message Class | Single Choice | The type of item from an email client (e.g., email, contact, calendar, etc.). | | |
| Message ID | Fixed Length: 255 | Unique identifier of emails in mail stores created by software and extracted to field by software | | |
| Number of Attachments | Whole Number | Number of attachments for a particular record. The count of the child items in the family group only appear on the parent document record. | | |
| Organization | Fixed | Company field extracted from the metadata of the file | | |

| Field Name | Type | Description | Group By | Pivot |
|--------------------------|-------------------|---|----------|-------|
| | Length: 255 | | | |
| Original Author Name | Fixed-Length Text | The display name of the original author of an email. | | |
| Original Email Author | Fixed-Length Text | The email address of the original author of an email. | | |
| Original File Extension | Fixed-Length Text | The original three (or more) character extension of the file that represents the file type to the Windows Operating System (e.g., PDF, DOC, TXT, etc.). | | |
| Original Folder Path | Fixed Length: 255 | Folder location of each native file within the hierarchy extracted by software | | |
| Outlook Flag Status | Single Choice | The indicator of which flag, if any, an Outlook item has assigned to it (NoFlag, FlagMarked, or FlagComplete). | | |
| Pages | Whole Number | Available for imaged documents only | | |
| PowerPoint Hidden Slides | Yes/No | The yes/no indicator of whether a PowerPoint file contains hidden slides. | | |
| Privilege Hits | Long Text | List of responsive privilege term hits found in the document and separated by semicolons. These terms must be provided before metadata extraction. | | |
| Read Receipt | Yes/No | Read receipt request notification value saved within the email system and extracted from metadata | | |
| Received Date | Date | The date on which an email message was received. | | |
| Received Time | Long Text | The time at which an email message was received. | | |
| Recipient Name (To) | Long Text | The name(s) of the recipient(s) of an email message. | | |
| Review Beg Attach | Fixed Length: 60 | Review ID of the first item in a family group *** created by the metadata extraction software. The same numbers for begin and end attachments repeat for all members of the family group. *** | | |
| Review End Attach | Fixed Length: 60 | Review ID of the last file in a family group*** numbered by the metadata extraction software*** | | |

| Field Name | Type | Description | Group By | Pivot |
|------------------------|-------------------|--|----------|-------|
| Review ID | Fixed Length: 60 | Unique document-level identification number assigned by metadata extraction software. It's incremented by one per document and not based on pages. | | |
| Review Volume | Fixed Length: 60 | Review volume name | | |
| Search Hits | Long Text | List of responsive search term hits found in document separated by semicolons. These terms must be provided before metadata extraction. | | |
| Sender Name | Fixed-Length Text | The name of the sender of an email message. | | |
| Sensitivity | Single Choice | Sensitivity field extracted from an email (ex: 0 = Normal; 1 = Personal; 2 = Private; 3 = Confidential) | | |
| Sent Date | Date | The date on which an email was sent. | | |
| Sent Time | Long Text | The time at which an email message was sent. | | |
| Suspect File Extension | Yes/No | The yes/no indicator if whether the extension of a file does not correspond to the actual type of the file (e.g., XLS for a Word document). | | |
| Title | Long Text | The title of the file. For emails, this is the subject line. For non-emails, this is any available title. | | |
| Unread | Yes/No | Read status of an email indicating whether an has ever been opened. True means is has never been opened. False means it has been opened. | | |

3.2.2 Relativity script fields

Relativity script fields are required when using Relativity scripts.

| Field Name | Type | Description | Group By | Pivot |
|-------------|------|---|----------|-------|
| Parent Date | Date | Date of parent document propagated to entire family group. Generally the Date Sent field is used for email and date modified field is used for documents. | | Y |

3.2.3 Outside source fields

These outside fields are used to accommodate data from production software.

| Field Name | Type | Description | Group By | Pivot |
|-----------------------|------------------|--|----------|-------|
| Bates Prod Beg | Fixed Length: 60 | Bates number or production number on first page of document | | |
| Bates Prod Beg Attach | Fixed Length: 60 | First Bates number or production number in family group *** | | |
| Bates Prod End | Fixed Length: 60 | Bates number or production number on last page of document | | |
| Bates Prod End Attach | Fixed Length: 60 | Last Bates number or production number of last page in family group *** | | |
| Production Volume | Fixed Length: 60 | Production volume name assigned during production and only available on documents produced | | |

3.2.4 User input

User input fields handle coding and production information.

| Field Name | Type | Description | Group By | Pivot |
|------------------------|-------------------|--|----------|-------|
| Designation | Single Choice | Responsiveness of document determined by reviewers. Indicates whether document needs to be produced for a document request. Choices typically are Responsive, Non-Responsive, Privilege or Not Sure. | Y | Y |
| Issues | Multi-Choice | Issues for the case | Y | Y |
| Markup Set-Review | Fixed Length: 400 | Markup Set - Review | | |
| Privilege Description | Long Text | Explanation of privilege reason coded by reviewers | | |
| Privilege Type | Multi-Choice | Type of privilege information in document decided by reviewer. Choices might include Attorney-Client Communication, Attorney Work Product, etc. | Y | Y |
| Production Create Date | Date | Date and time of production creation | Y | Y |
| Production Date | Date | Date a production was sent | Y | Y |

3.3 Relational fields

Relativity has a Related Items pane for viewing groups of related documents. When reviewing a single document the related items pane is at the lower right corner by default. This relational information is passed to the database from the loaded data. Any fixed-length text field under 450 characters can be relational. Using the same document identifier information across documents, the database knows what items are related. Examples of relational fields are:

| Field Name | Displays |
|-------------------|-----------------------|
| Conversation ID | Email Threads |
| MD5 Hash | Exact duplicate items |
| Review Beg Attach | Family items |

3.4 Propagation

Propagation makes the field information consistent across all records in a related items group. In the template no fields have been set for propagation. You might want to propagate duplicates or family groups, but remember the field must be relational.

Things to remember:

- Propagation applies to only one tier of related items. Selecting the duplicate of an item only propagates to the duplicate, not to the duplicate and the duplicate's family members.
- Propagation doesn't work when importing items through the Desktop Client.
- Propagation requires two steps:
 - Related item creation
 - Checking Propagation on the field you want to propagate

4 Security setup

The starter template has three levels of security setup. This is only a guideline and can be edited for your environment. Typically a new set of three groups are created for each workspace and system admins copy the security from the template level groups to the unique workspace groups, mimicking the same levels as the template with minor edits.

Level 1 is targeted at base level reviewers who have very limited rights and primarily check out batches and edit documents.

Level 2 users are able to do more case setup such as create searches and batches. This level doesn't have system admin rights or case setup rights but does have rights for setting up and administering the review process.

Level 3 is not a full system admin, but all case loading and setup options are available. This person is responsible for loading the data and insuring layouts and views are properly created.

4.1 Security

The following table shows the security setup levels in the starter template.

| Security | Level 1 | Level 2 | Level 3 |
|---------------|---------|--------------------------|--|
| Workspace | View | View | View |
| Folder | View | Edit | Delete/Add/Edit Security |
| Document | Edit | Edit | Delete/Add/Edit Security/Print/Local Access (Download, Copy Text, PrintScreen)/Redact Document/Highlight Document/Add Image/Delete Image |
| Report | View | Delete/Add/Edit Security | Delete/Add/Edit Security |
| Field | View | View | Delete/Add/Edit Security/Add Field Choice by Link |
| Layout | View | Edit | Delete/Add/Edit Security |
| Production | View | Edit | Delete/Add/Edit Security |
| View | View | Edit | Delete/Add/Edit Security |
| Search Folder | View | Edit/Add/Edit Security | Delete/Add/Edit Security |
| Search | View | Edit/Add/Edit Security | Delete/Add/Edit Security |
| Choice | View | View | Delete/Add/Edit Security |
| Markup Set | View | Edit/Add | Delete/Add/Edit Security |
| Tab | View | View | Delete/Add/Edit Security |
| Batch Set | View | Edit/Add | Delete/Add/Edit Security |

| Security | Level 1 | Level 2 | Level 3 |
|---------------------|---------|----------|--------------------------|
| Batch | View | Edit/Add | Delete/Add/Edit Security |
| Object Type | View | View | Delete/Add/Edit Security |
| RelativityScript | View | View | Delete/Add/Edit Security |
| Search Index | View | View | Delete/Add/Edit Security |
| TransformSet | None | View | Delete/Add/Edit Security |
| Search Terms Report | None | Edit/Add | Delete/Add/Edit Security |
| Search TermsResult | None | Edit/Add | Delete/Add/Edit Security |
| WorkProduct | None | View | Delete/Add/Edit Security |
| Contacts | None | View | Delete/Add/Edit Security |
| CaseInfo | None | View | Delete/Add/Edit Security |
| PivotProfile | Edit | Edit/Add | Delete/Add/Edit Security |
| OCRProfile | View | View | Delete/Add/Edit Security |
| OCRSet | View | View | Delete/Add/Edit Security |

4.2 Tab visibility

The following table shows the tab visibility security levels in the starter template.

| Security | Level 1 | Level 2 | Level 3 |
|----------------------|---------|---------|---------|
| Documents | Yes | Yes | Yes |
| Markup Sets | No | No | Yes |
| Choices | No | No | Yes |
| Relativity Utilities | No | No | Yes |
| Batch Sets | No | Yes | Yes |
| Administration | No | Yes | Yes |
| User Status | No | Yes | Yes |
| Pleadings | No | Yes | Yes |
| Work Product | No | Yes | Yes |
| Workspace Details | No | No | Yes |
| Production Sets | No | Yes | Yes |
| Layouts | No | No | Yes |

| Security | Level 1 | Level 2 | Level 3 |
|----------------------|---------|---------|---------|
| Tabs | No | No | Yes |
| Object Type | No | No | Yes |
| Scripts | No | No | Yes |
| Transform Sets | No | No | Yes |
| Contacts | No | Yes | Yes |
| Summary Reports | No | Yes | Yes |
| Fields | No | No | Yes |
| Views | No | No | Yes |
| History | No | Yes | Yes |
| Review Batches | Yes | Yes | Yes |
| Search Indexes | No | No | Yes |
| Search Terms Reports | No | Yes | Yes |
| Case Info | No | No | Yes |
| OCR Profiles | No | No | Yes |

4.3 Browsers

The following table shows the browsers security levels in the starter template.

| Security | Level 1 | Level 2 | Level 3 |
|---------------------------|---------|---------|---------|
| Clusters | No | No | Yes |
| Folders | Yes | Yes | Yes |
| Advanced & Saved Searches | No | Yes | Yes |
| Field Tree | Yes | Yes | Yes |

4.4 Mass actions

The following table shows the mass actions security levels in the starter template.

| Security | Level 1 | Level 2 | Level 3 |
|----------|---------|---------|---------|
| Cluster | No | Yes | Yes |

| Security | Level 1 | Level 2 | Level 3 |
|--------------------|---------|---------|---------|
| Mass Copy | No | Yes | Yes |
| Mass Delete | No | Yes | Yes |
| Mass Images | No | Yes | Yes |
| Send to Casemap | No | No | Yes |
| Process Transcript | No | No | Yes |
| Mass Edit | No | Yes | Yes |
| Mass Produce | No | Yes | Yes |
| Mass Print Image | No | Yes | Yes |
| Export to File | Yes | Yes | Yes |
| Mass Move | No | No | Yes |
| Mass Replace | No | Yes | Yes |
| Tally/Sum/Average | Yes | Yes | Yes |

4.5 System admin operations

The following table shows the system admin operations security levels in the starter template.

| Security | Level 1 | Level 2 | Level 3 |
|----------------------------------|---------|---------|---------|
| Assign Batches | No | No | Yes |
| View Workspace Details | No | No | No |
| Override Production Restrictions | No | No | Yes |
| Manage Object Types | No | No | Yes |
| View User Status | No | Yes | Yes |
| View All Audits | No | Yes | Yes |
| Use Pivot/Chart | No | Yes | Yes |
| View Relativity Utilities | No | No | Yes |
| View Batch Pane | No | Yes | Yes |

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