Workstation Configuration Guide

November 24, 2021 | Version Server 2021

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1 Workstation configuration

Before using Relativity for document review, it's important to consider workstation configuration properties potentially required in your environment. This document outlines those workstation components that ensure Relativity's accessibility and functionality.

For ActiveX viewer workstation configuration details, see Legacy viewer installation.

1.1 Considerations for all browsers

Relativity does not support the following:

- Accessing the same Relativity instance with multiple tabs at the same time.
- Accessing the same Relativity instance with multiple browsers at the same time.

1.2 Google Chrome (Mac and PC) considerations

1.2.1 Disable pop-up blocker

1.2.2 Additional settings

Refer to Browser specific considerations for information on additional settings for Chrome.

1.3 Safari (Mac only) considerations

1.3.1 Disable Pop-up blocker

Relativity opens new windows where you can perform specific actions. Your web browser's pop-up blocker may block new windows from opening by default. Make sure to disable the pop-up blocker when you're working in Safari.

1.3.2 Additional settings

Refer to Browser specific considerations for information on additional settings for Safari.

1.4 Internet Explorer 10 and 11 considerations

Note: Microsoft Internet Explorer 10.x (32-bit) is supported only on Windows 8 for Relativity 7.5.630.50 and later. In addition, Relativity doesn't support Internet Explorer 10 and 11 with Compatibility View.

1.4.1 Legacy viewer

Relativity 9 uses the HTML viewer by default. You can configure your Relativity environment to use the legacy ActiveX viewer, or to switch from the HTML to the ActiveX viewer on an individual basis. You must

also download and install the latest version of the Viewer Installation Kit. For details, see Legacy viewer installation.

> **Note:** Make sure that you have the latest version of the legacy viewer from Oracle before you attempt to use the legacy ActiveX option in Relativity Server2021.

1.4.2 Custom level security

Internet Explorer may require you to enable the **Font download** option in the custom security settings to properly load the viewer toolbar icons.

To enable Font download in the Internet Explorer custom security settings, perform the following steps:

1. Open **Internet options** in Internet Explorer, and then click **Settings** under Browser history.

2. Select **Every time I visit the webpage** on the **Temporary Internet Files** tab.
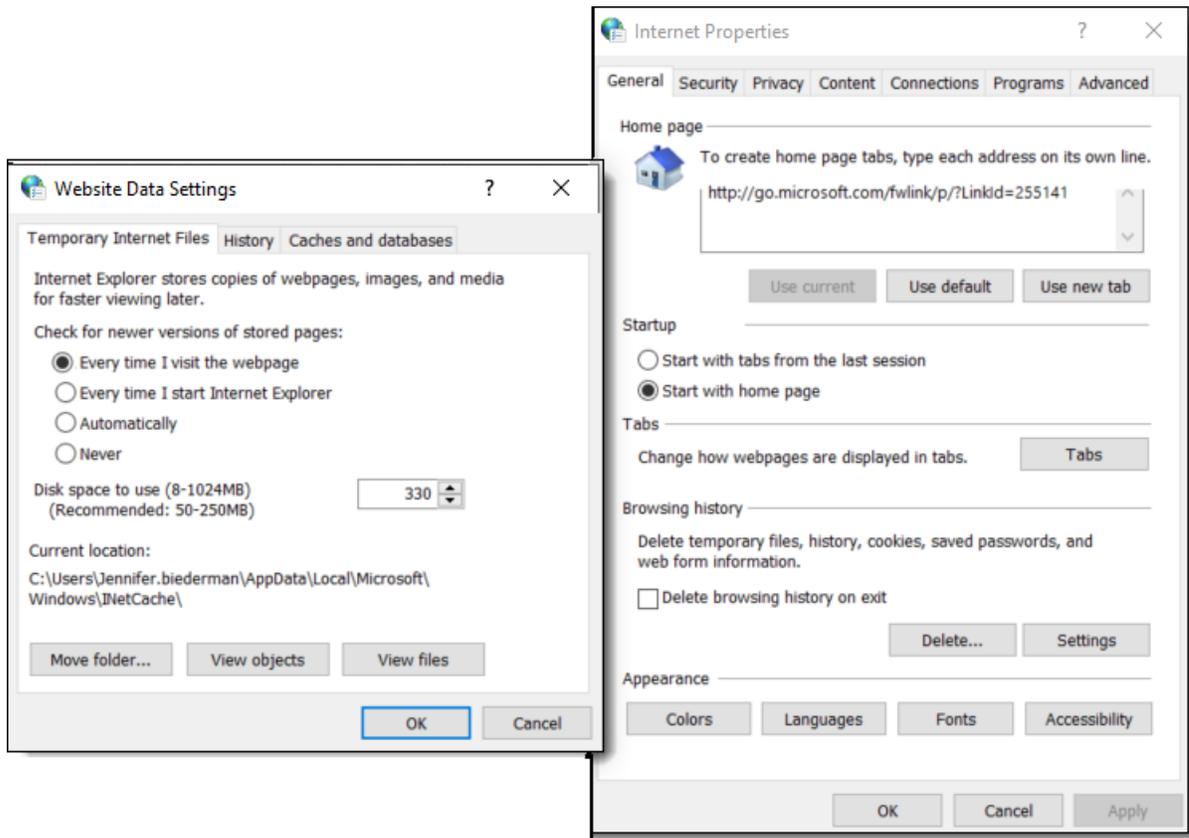
3. Click the **Security** tab. Select the zone that the Relativity website is in: **Internet**, **Local Intranet**, or **Trusted Sites**.

4. Click **Custom level**.
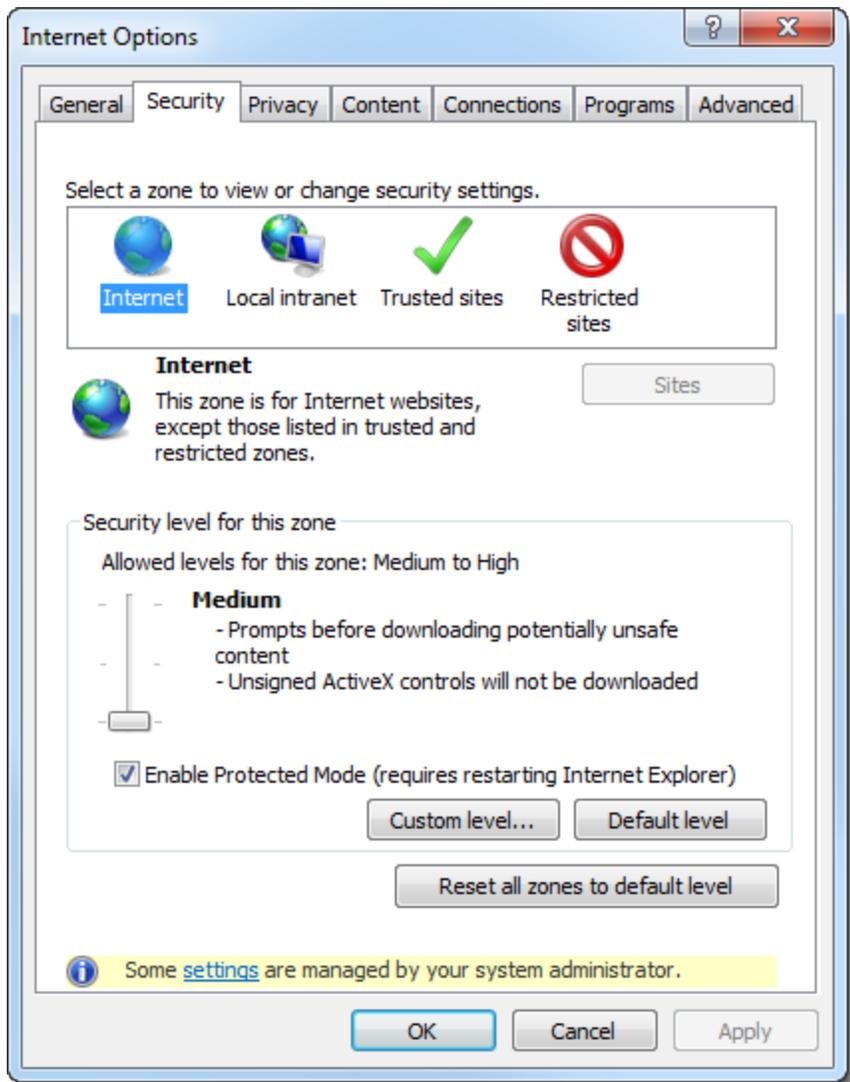
5. Select **Enable** for the **Font download** setting.
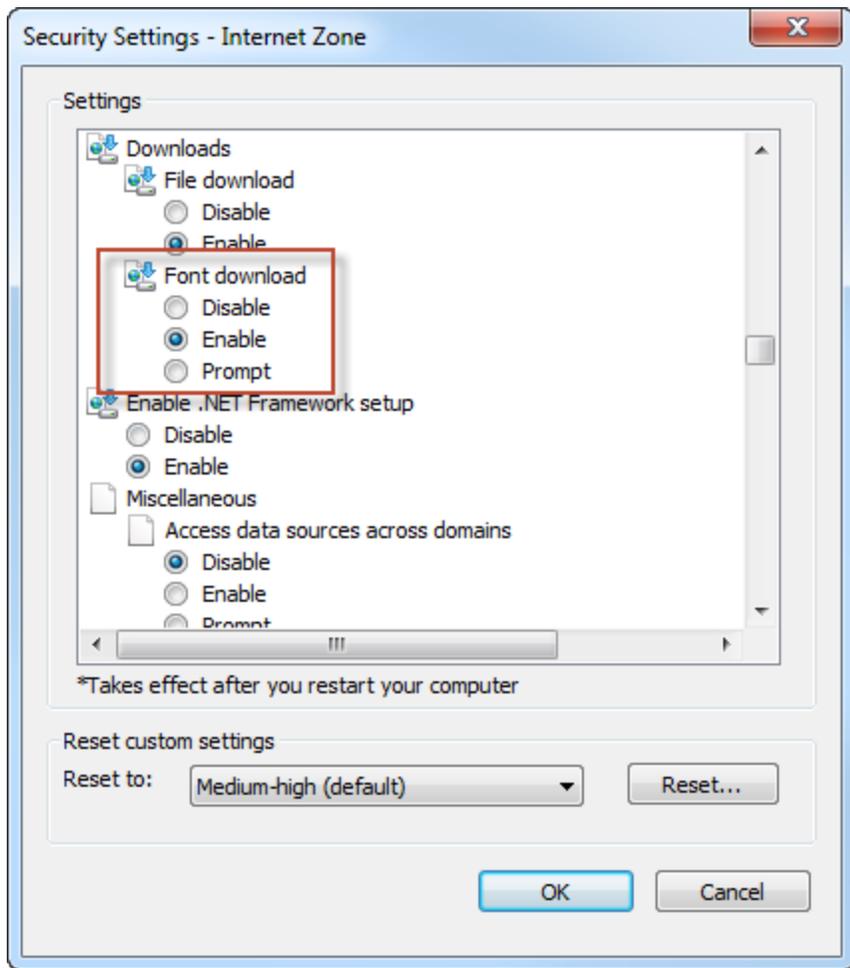
6. Click **OK**.

7. Click **Apply**, and then **OK**.

8. Exit and restart Internet Explorer.

1.4.3 Disable Pop-up blocker

Relativity opens new windows where you can perform specific actions. Your web browser's pop-up blocker may block new windows from opening by default . Refer to Change security and privacy settings for Internet Explorer > Pop-up Blocker for instructions to disable the pop-up blocker in Internet Explorer.

1.4.4 Network considerations

- The viewer uses the RelativityWebAPI as well as the Relativity.Distributed components.

  Note: Inside the viewer, the Distributed piece is called from within the application, as indicated by the URL referenced in the bottom left corner of the viewer pane.

- The files retrieved in the viewer are HTTPS.

> **Note:** If a user does not have the latest Microsoft updates to add 3rd Party Certificate authorities as trusted certificates, an error message could occur, even if the user is using the correct website.

1.4.5 Documents in other languages

In Relativity you can review documents in other languages.

If you are reviewing documents on Windows Vista or 7 PC, no steps are required. You should be able to view documents in other languages immediately.

However, installation steps are required if you are:

- Managing a background worker manager server

- Managing a web server

The following installation steps are provided by Microsoft. To learn more, visit their website at http://support.microsoft.com/, and see Installing alternate language settings on page 25 for step-by-step instructions.

2 User hardware and software requirements

This section outlines requirements and recommendations for a workstation used to access Relativity.

Note: Relativity viewer versions 6 and 7 are side-by-side compatible. To ensure proper viewer functionality, users must close their browsers before they switch from one version to the next.

2.1 Supported operating systems

The following operating systems support Relativity:

- Windows 10

- Windows 8 Desktop Mode (PC)

- Windows 8.1

- Windows Server 2012 R2

- Windows Server 2016

- Windows Server 2019

Note: Windows 8 User Interface mode is not supported whether you're using a PC or a tablet computer. The version of IE 10 for Windows 8 User Interface mode doesn't support installation of the Relativity viewer.

2.1.1 Relativity Desktop Client

The Relativity Desktop Client (RDC) is a utility used for importing and exporting documents, images, natives, and productions. This utility requires the following software:

- Upgrade to Microsoft .NET 4.6.2 to install the latest version of RDC. You must also install Microsoft Visual C++ 2015 Redistributable.

Note: Visual C++ 2005 SP1 Redistributable x86 is supported on 32-bit and 64-bit OS, but x64 is supported on 64-bit OS only.

For detailed installation instructions, see the Desktop Client Guide.

2.1.2 Supported browsers

The following browsers support Relativity:

- Microsoft Internet Explorer 11.x*

  Note: As of August 31, 2017, we no longer support Internet Explore (IE) 10. Please upgrade to a compatible version of IE 11.

- Google Chrome latest version (on both PC and Mac)

- Apple Safari v11+ (Mac OS X 10.9)

- Apple Safari v11+ (Mac OS X 10.10)
- Firefox latest version (on both PC and Mac)*

Note: Microsoft Internet Explorer 10.x (32-bit) is supported only on Windows 8 for Relativity 7.5.630.50 and later. In addition, Relativity doesn't support Internet Explorer 10 and 11 with Compatibility View.

2.1.3 Windows 8

There are two versions of Windows 8:

- **Windows RT** - this version of Windows is optimized for ARM processor-based tablets and PCs. Relativity does not support this version.
- **Windows 8 Pro** - this version runs the full Windows 8 software, so it can integrate with your existing infrastructure. This version is supported with Relativity 7.5.630.50 and later. Make sure you're running in Desktop mode with Compatibility View disabled in Internet Explorer 10.

2.1.4 JavaScript errors with IE10 and Windows 7

If you're using Internet Explorer 10 with Windows 7, you may encounter certain JavaScript errors like the following while running Relativity:
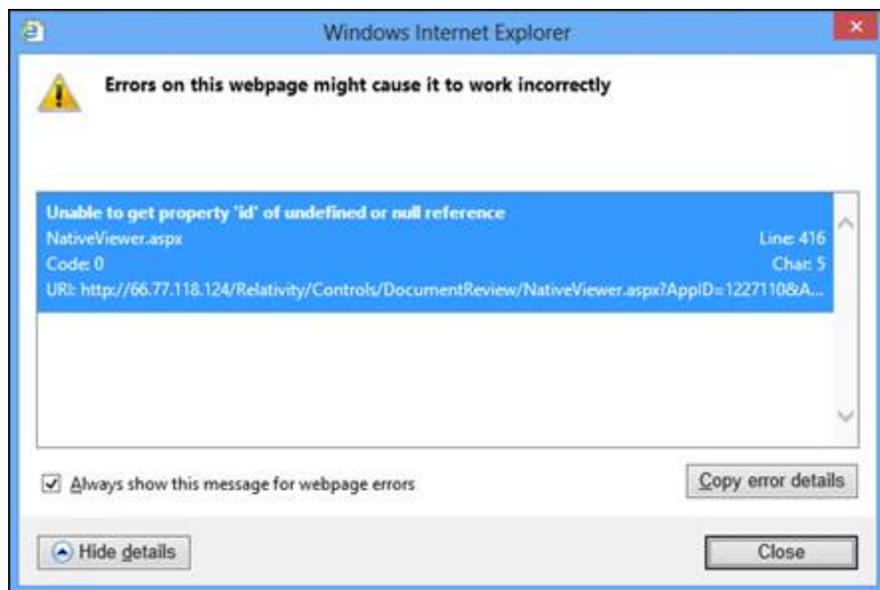
These errors can occur on the document review page when HTML-enabled fields are present on the layout. They can also occur when the stand-alone viewer is launched. These errors don't affect functionality. If you click **Close** on the error dialog, the error disappears and you can use Relativity as normal.

To resolve this issue, perform the following steps:

1. Open the Internet Options window, and then select the **Advanced** tab.
2. Deselect **Display a notification about every script error** in the Browsing section.

3. Select **Disable script debugging (Internet Explorer)**.

4. Click **OK**.

2.1.5 Resolution Support

Relativity is supported in the following resolutions:

- Standard resolution: 1920x1080

- Smallest resolution: 1366x768

- Largest resolution: 2560x1440

2.2 Hardware

A user's workstation and network connection have a significant influence on his/her Relativity experience.

2.2.1 Minimum workstation configuration

- 512MB SDR memory

- Intel Pentium 3 or equivalent

2.2.2 Recommended workstation configuration

- 1GB DDR memory

- Intel Pentium 4/AMD Athlon XP

3 Browser-specific considerations

Refer to the following browser specific considerations when using RelativityOne.

3.1 Changing the language settings in Chrome

Internet Explorer syncs the region and language settings with the operating system. Chrome does not have the same behavior.

You must manually change the language settings in Chrome to keep the language settings in sync with the operating system.

To change the language settings in Chrome, refer to the Chrome documentation.

Note: Make sure to place the selected language at the top of the Languages list, as Chrome uses the first language by default.

3.2 Using single sign-on (SSO) on a Mac in Chrome and Safari

In order for single sign-on (SSO) authentication to work on a Mac in Chrome and Safari, you must use SSO in conjunction with the Mac Keychain application.

- Safari considerations
  - Safari prompts for credentials the first time you access Relativity. If you select **Remember this password in my Keychain** you won't be prompted for credentials again
  - If you change your Active Directory password, you are prompted to update your Keychain at log in. This updates the Safari saved password and you are not prompted when accessing Relativity.
  - If you manually delete the entry in the Keychain, you are prompted for credentials when accessing Relativity.
- Chrome considerations
  - Chrome prompts you for credentials the first time you access Relativity. After you authenticate your machine, click **Yes** to remember the password and save the password in the Keychain.
  - Chrome pre-populates the prompt with credentials.

3.3 Pop-up blockers in Firefox

By default, Firefox blocks some pop-ups in Relativity. Normally, Firefox displays a message near the URL bar stating that a pop-up was blocked and asks whether to allow pop-ups for the website. For certain pop-ups, this message displays but then disappears immediately, before giving you a chance to allow pop-ups.

This error occurs in the Delete button in the action bar of any object's View page. To work around this issue, perform the following steps:

1. Navigate to the Firefox browser Options menu.

2. Click the **Content** tab, then under the Block pop-up windows section, click **Exceptions**.

3. Add the URL of Relativity (e.g.,, http://localhost/Relativity).

After performing these steps, Firefox doesn't block any Relativity pop-ups in the environment.

Alternatively, you can disable pop-up blocking for all websites by clearing the **Block pop-up windows** option in the Content tab.

3.4 Pop-up blockers in Safari

Similar to Firefox, Safari also blocks the Delete pop-up on any object's View page, but Safari never alerts the user. To work around this issue, open the Preferences menu, navigate to the **Security** tab, and clear the **Block pop-up windows** option. Safari no longer blocks pop-ups from any website.

3.5 Enable tabbing on a Mac in Safari or Firefox

When working in Relativity using Safari or Firefox on a Mac OS, you must configure the following settings to enable tabbing:

3.5.1 Safari

- Navigate to the Advanced tab from Safari Preferences, and then select **Press Tab to highlight each item on a webpage**.

3.5.2 Firefox

1. Click **Keyboard** from System Preferences, and then navigate to the Shortcuts tab.

2. Select **All Controls** near the bottom of the window in the Full Keyboard access section.

Enabling the All Controls setting can cause a cursor to appear to the right of any items you've highlighted using the Tab key. To stop this cursor from appearing, perform the following steps:

1. Navigate to the Advanced tab from System Preferences.

2. Click the **General** subtab if necessary, and then select **Always use the cursor keys to navigate within pages**.

4 Legacy viewer installation

This section outlines how to install the legacy ActiveX viewer. This information is only relevant to system admins who want to set up their Relativity Server2021 environment to use the ActiveX viewer instead of the HTML viewer. You can also let users switch from the HTML to the ActiveX viewer on an individual basis. If you plan on using only the default HTML viewer, you don't need to follow the steps on this page.

The ActiveX Server2021 viewer is compatible with Relativity Server2021. However, we recommend you always use the latest version of the ActiveX viewer.

If you have instances using a version prior to Relativity Server2021, you should not install the ActiveX Server2021 viewer in those instances. For details, see the Viewer section of the Relativity Admin Guide.

Notes:
- To install the latest version of ActiveX viewer, you must have Microsoft .NET 4.6.2 runtime or above and Microsoft Visual C++ 2015 Redistributable installed on the client machine.

- We recommend that you download and install the latest version of the Viewer Installation Kit.

- You can't use the Relativity 9.5.196.102 viewer with earlier versions of Relativity.

- Earlier versions of the ActiveX viewer aren't compatible with Relativity 9.5.196.102.

- If you have a client machine that accesses multiple instances of Relativity that require different versions of the ActiveX viewer, the corresponding ActiveX viewers must be installed. To ensure proper viewer functionality, you must close their browsers before they switch from one version to the next.

- If you are running an OS that is x64 and not x86, you need to use IE x86 (32-bit) when accessing Relativity because the Relativity Viewer is a 32-bit application.

- You can only use the ActiveX viewer in Internet Explorer.

- For ActiveX viewer versions before 9.5.196.102, you must install Microsoft .NET 4.5.1.

Make sure that you have the latest version of the legacy viewer from Oracle before you attempt to use the legacy ActiveX option in Relativity Server2021.

4.1 Pre-installation configuration

4.1.1 Adding Relativity as a trusted site

By default, IE prompts you to verify viewer downloads. Installation can proceed without warnings when you add Relativity as a trusted site, which is also required for proper operation of the viewer.

To add Relativity as a trusted site, perform the following steps:

1. Browse to **Tools**, then **Internet Options**in Internet Explorer.

2. Select the **Security** tab from the Internet Option window.
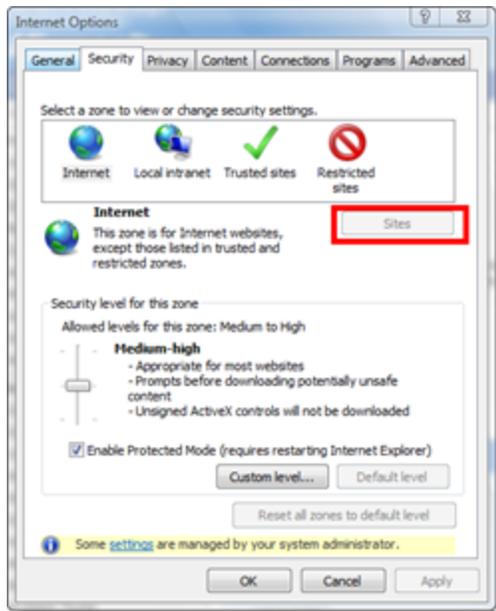
3. Select **Trusted sites** (usually a green check mark) on the Security tab, and then click **Sites**. The Trusted Site window appears. Your Relativity URL should display in the **Add this website to the zone** text box.

4. Click **Add** to add Relativity to the list of trusted sites.

In addition to adding Relativity as a trusted site within your Internet Options, you may have to modify your custom level settings to install the viewer.

4.1.2 Configuring Internet Explorer in environments with distributed web components

If your environment is configured with Relativity web components installed on separate web servers, perform the following configuration steps:

Note: If you are not working in an environment with distributed web components, you can skip this configuration step. Contact your system admin for additional information about your environment configuration.

1. Click **Custom level** on the Security tab after you add Relativity as a Trusted Site.

2. Scroll down to the option called **Access data sources across domain** on the Trusted Sites Zone window.

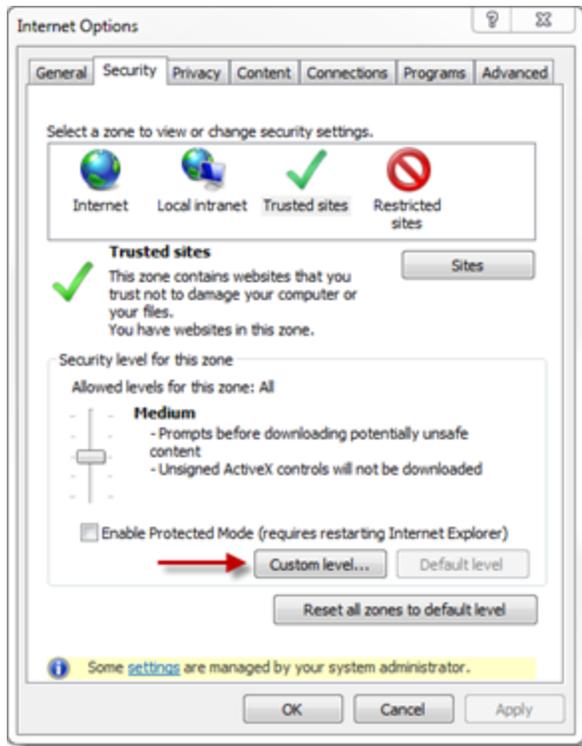3. Select **Enable**, and then click **OK**.

4.1.3 Custom level ActiveX settings

In addition to adding Relativity as a trusted site within your Internet Options, you may have to address your custom level settings for viewer installation.

To set your custom levels, perform the following steps:

1. Click the **Security** tab on the Internet Options window.

2. Click **Custom level**.

3. Confirm that Download signed ActiveX controls is set to **Prompt**.
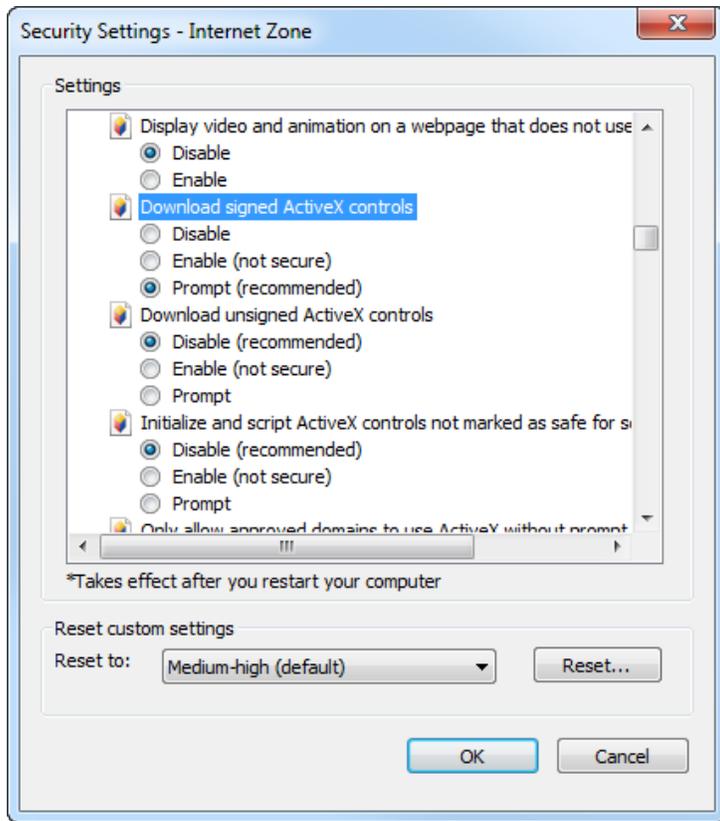
4. Confirm that Run ActiveX controls and plug-ins is set to **Enable**.
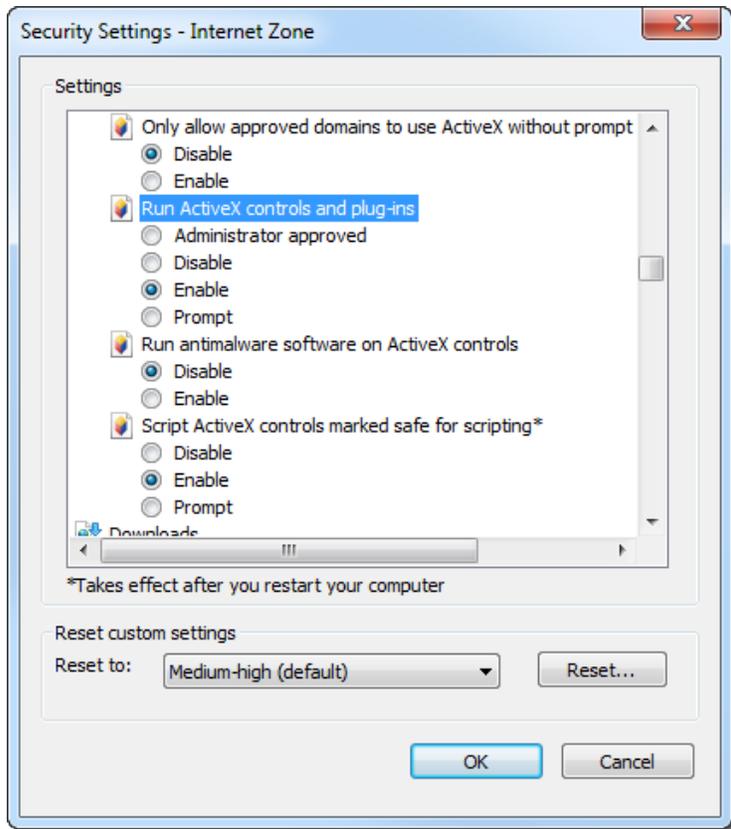
Note: Failing to set the above Internet custom levels could prevent viewer installation from completing.

4.1.4 Configuring download settings

To configure download settings, perform the following steps:

1. Browse to **Tools** > **Internet Options** in Internet Explorer.

2. Select the **Security** tab from the Internet Option window.

3. Select **Trusted sites** (usually a green check mark), and then click **Custom Level** on the lower half of the screen.

4. Scroll to the Downloads section on the Security Settings – Trusted Sites Zone pop-up.

5. Configure the settings in this section to match the following:

   - Automatic prompting for file downloads - **Enable (IE 10 and below)**

   - File download - **Enable**

   - Font download - **Enable**
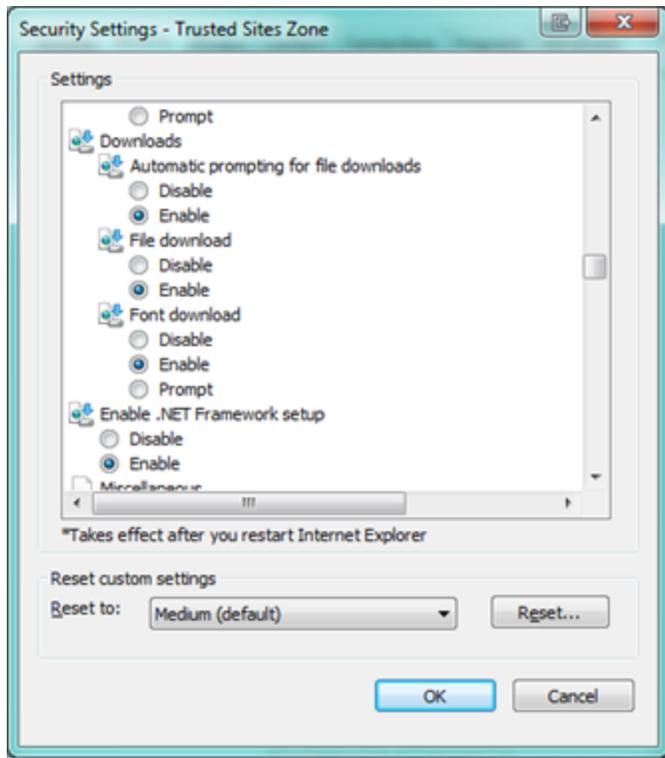
6. Click **OK**.

4.1.5 Configuring temporary Internet file settings

You can configure Internet Explorer to check for newer versions of pages and media instead of loading the previously stored versions.

To configure this temporary Internet file setting, perform the following steps:

1. Browse to **Tools** > **Internet Options** in Internet Explorer.

2. Select the **General** tab.

3. Click **Settings** under Browsing History. .

4. Select **Every time I visit the webpage** on the Temporary Internet Files and History Settings pop-up.
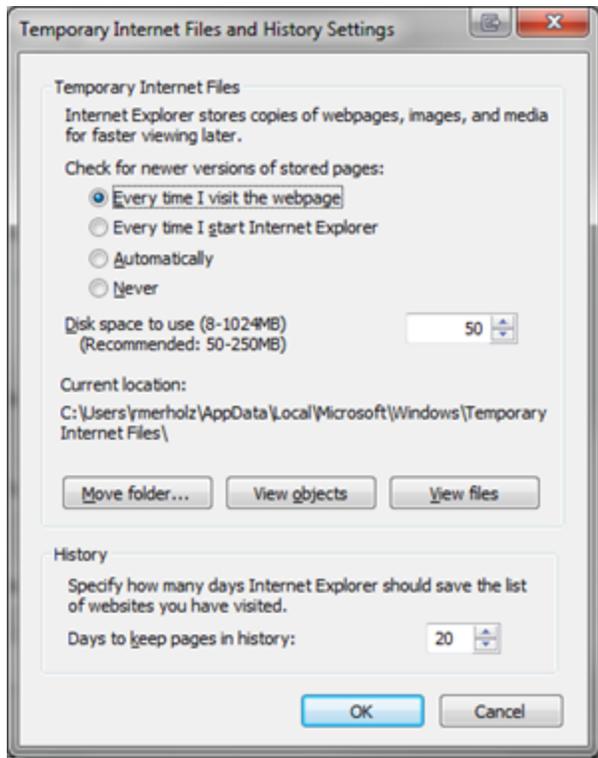
5. Click **OK**.

4.1.6 Network considerations

- The viewer uses the RelativityWebAPI as well as the Relativity.Distributed components.
  - Inside the viewer, the Distributed piece is called from within the application, as indicated by the URL referenced in the bottom left corner of the viewer pane.

- The viewer retrieves HTTPS files.

Note: If a user does not have the latest Microsoft updates to add 3rd Party Certificate authorities as trusted certificates, an error message could occur, even if the user is using the correct website.

4.1.7 Documents in other languages

In Relativity you can review documents in other languages.

If you are reviewing documents on Windows Vista or 7 PC, no steps are required.

However, installation steps are required if you are:

- Reviewing documents on a Windows XP PC

- Managing a background processing server

- Managing a web server

The following installation steps are provided by Microsoft. To learn more, visit their website at http://support.microsoft.com/, and see Installing alternate language settings on the documentation site for step-by-step instructions.

4.2 Installing the ActiveX viewer

4.2.1 Enterprise viewer deployment

This section includes instructions for use by system admins who want to deploy the ActiveX viewer across their organization. You can download a standalone utility for installing the viewer, and then run it according to the procedures established by your organization for installing applications.

Note: To obtain the Viewer Installation Kit, you must be able to access a workspace in Relativity. You must also have the security permission **View Workspace Details** under Admin Operations on the Security page.
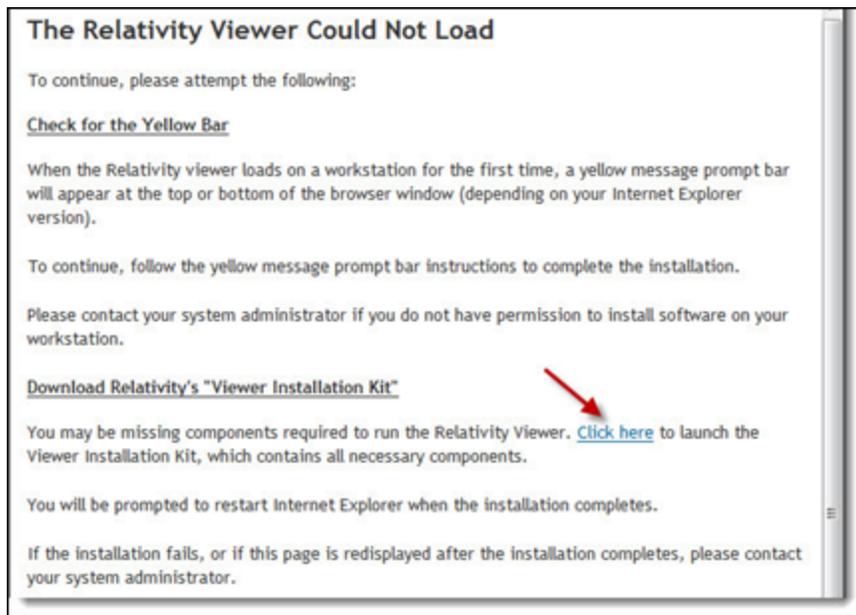
1. Log in to Relativity.

2. Click on a workspace where you have the security permission **View Workspace Details**.

3. Select the **Administration** tab, and then click **Workspace Details**.

4. Click **Download Viewer Installation Kit** to download the utility containing executable files for the viewer installation.

5. Run the executable and follow the instructions on the dialogs. Depending on the current workstation configuration, some or all of the files list in the dialog will be installed.

6. Restart the browser after the installation completes.

4.2.2 Single workstation viewer installation

To install the Relativity viewer, you must complete a one-time process, which initiates when you open a document in the Relativity viewer for the first time. Before you begin, make sure that you completed the steps in Adding Relativity as a trusted site on page 14.

The settings on your workstation determine the steps that you need complete to install the viewer. This section describes the messages that most users encounter.

1. Log in to Relativity, and navigate to a workspace.

2. Click a document to open it.

3. If a warning message appears at the top or bottom of your browser, use the following instructions to install the add-on. Otherwise, continue to step 3.

   a. Right-click the warning, and then select **Install This Add-on for All Users on This Computer**.

   b. Click **Install** on the pop-up. If the viewer has successfully installed, you can begin working with your document. Complete step 3 if an error message displays.

4. If Relativity displays a message indicating that the viewer could not load, use the following instructions to run the Viewer Installation Kit.

The Relativity Viewer Could Not Load

To continue, please attempt the following:

Check for the Yellow Bar

When the Relativity viewer loads on a workstation for the first time, a yellow message prompt bar will appear at the top or bottom of the browser window (depending on your Internet Explorer version).

To continue, follow the yellow message prompt bar instructions to complete the installation.

Please contact your system administrator if you do not have permission to install software on your workstation.

Download Relativity's "Viewer Installation Kit"

You may be missing components required to run the Relativity Viewer. Click here to launch the Viewer Installation Kit, which contains all necessary components.

You will be prompted to restart Internet Explorer when the installation completes.

If the installation fails, or if this page is redisplayed after the installation completes, please contact your system administrator.

a. Click the link to launch the Viewer Installation Kit.

b. Click **Run** on the File Download warning message.

c. Click **Run** to begin the installation process.

d. Click **Install** to download the installation files. Depending on your workstation configuration, you may see all or some of the files listed in wizard for Relativity Viewer Installation Kit. The required files for the viewer may take several minutes to download. The installation wizard displays a progress bar for monitoring the download of these files.

e. Click **Finish** on the confirmation message after the installation completes.

f. Close and then reopen your browser. You can now use the viewer to display documents.

4.2.2.1 Issues with multiple file-viewing applications

If your workstation doesn't support multiple file-viewing applications, you may encounter Viewer issues. An error can occur while attempting to load Oracle Outside In dlls when another version of Relativity is run in the same IE session or when other file-viewing tools such as Quick View Plus or iPro are installed on the machine.

To resolve this issue, close all IE windows and reopen Relativity. If this does not resolve the issue and you are using Quick View Plus, please refer to the Quick View Plus section of this document.

4.3 Uninstalling old versions of the viewer

Note that the ActiveX Server2021 viewer is only backward compatible with Relativity 9.4. If you have instances using a version prior to Relativity 9.4, you should maintain the ActiveX version relevant to the version of Relativity you're using.

Perform the following steps to uninstall the Relativity viewer:

1. Click **Start** > **Control Panel** > **Add/Remove Programs**.

2. Double-click **Relativity Web Client** in the program list.

3. Click **Yes** on the confirmation window.

4. Duble-click **Relativity Web Client Manager** in the program list .

5. Click **Yes** on the confirmation window.

5 Viewing native documents in Internet Explorer

When reviewing documents in Relativity, it may be beneficial to open the document in its native application. If you have Windows XP, you can configure Internet Explorer to launch the native application docked in the Relativity viewer frame.

Note: This functionality is not available in Microsoft Windows Vista and higher. Users running Windows Vista and higher may view native documents from the native application, but users can't dock that application into the IE browser.

To configure a file type in Windows XP for viewing within Internet Explorer, perform the following:

Note: If you're using Internet Explorer 7 or 8, you won't be able to open Microsoft Office 2010 or 2007 documents in the same window as Internet Explorer. For more information about this issue, see the Microsoft technical notes for Office 2010 or Office 2007 documents.

1. Close all IE sessions before you begin.

2. Open Windows Explorer by either double-clicking on the My Computer icon or combining **Windows Key + E** on your keyboard.

3. Open the **Tools** menu, and then select **Folder Options**.

4. Click the **File Types** tab, and then select the desired file type from the list.

5. Click **Advanced**.

6. Check **Browse in same window**, and then click **OK**.

   Note: Not all native file types support the Browse in same window option. You can only view a file in its native application if this option is disable for the file.

7. Log in to Relativity and open a document of this file type.

8. Click the **Native** tab, and then verify that the document opens within the IE browser window.

9. (Optional) Repeat these steps for any additional file types.

6 Installing alternate language settings

To view documents in other languages, you must have the applicable languages installed in your Microsoft Operating System. For more information about Relativity and documents in other languages, see Documents in other languages on page 8.

1. Select **Start | Control Panel**, and then click the **Regional and Language Options** icon.

2. Select the **Languages** tab.

3. Select the checkbox that applies to your language needs under Supplemental language support. The complex script and right-to-left languages include Arabic, Armenian, Georgian, Hebrew, the Indic languages, Thai, and Vietnamese; the East Asian languages include Chinese, Japanese, and Korean. The files for most other languages are installed on your computer automatically by Windows.

4. Click **OK**, and then click **Apply**. Windows prompts you to insert the Windows CD-ROM or point to a network location where the files are located. After you install the files, restart your computer.

To remove the language files, deselect the checkbox beside the applicable collection, and then click **OK** and then click **Apply**.

See the Supported languages matrix for a complete list of languages that the language identification operation can detect.

7 Configuring Quick View Plus

The technology that drives Quick View Plus also drives the Relativity Viewer. As a result, you may see conflicts while trying to use the Relativity viewer on a machine with Quick View Plus installed.

To configure Quick View Plus correctly, follow these steps:

1. Open Quick View Plus, and then select **View | Configure Quick View Plus**. A menu displays a list of the applications that integrate with Quick View Plus.

2. Click any of the following applications that appear on the list. The Action section reads **Disable Integration**.

   - Microsoft Internet Explorer

   - Microsoft Outlook

   - Microsoft Express

   - Microsoft Word

   - Microsoft Excel

   - Microsoft PowerPoint

3. Click **Apply**, and then close out of Quick View Plus.

4. Locate the small magnifying glass icon in your Windows task bar. This is the icon for Quick View Plus.

5. Right-click on the icon, and then select **Exit Quick View Plus**.

6. Close all open Internet Explorer Windows and begin a new session.

7. Log in to Relativity, and then verify that you can now correctly display documents in the Relativity Viewer.

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