Relativity®

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 **Note:** The Starter Template has been replaced by the Quick Start Template.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:

- 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.
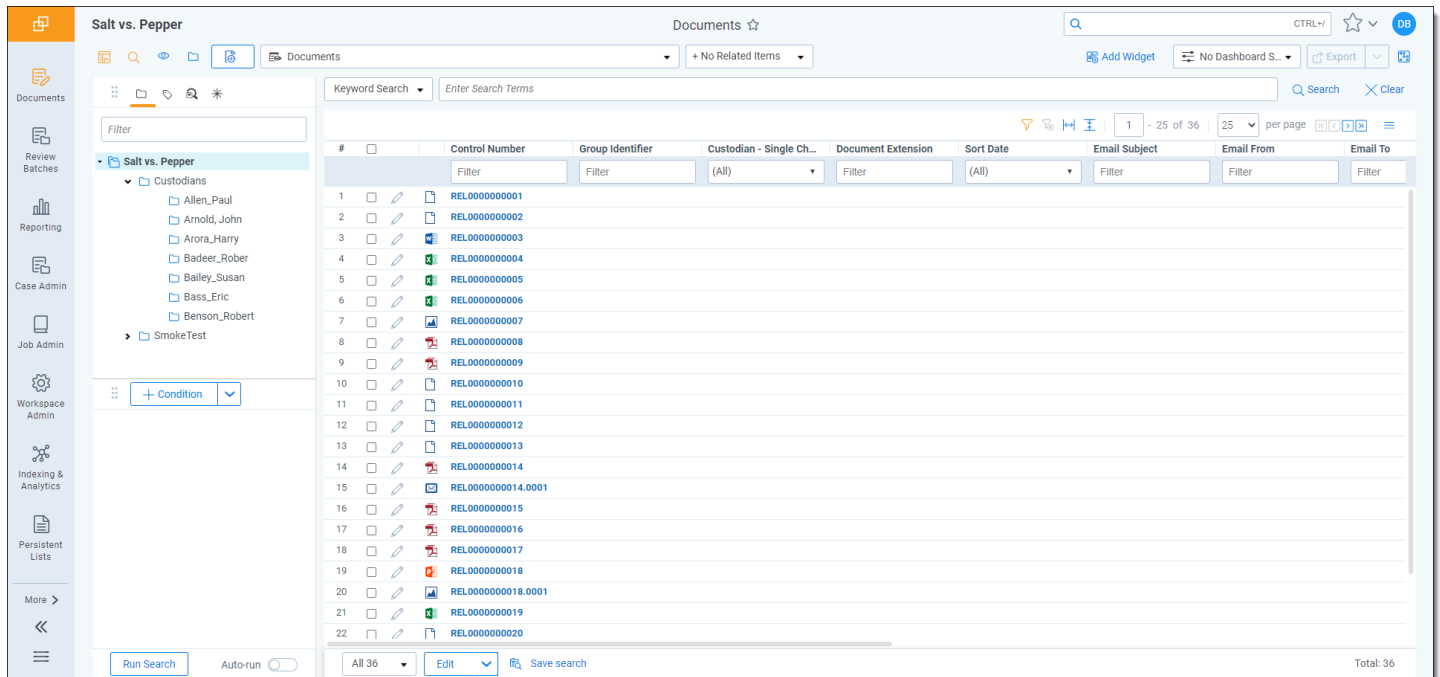
2.2 Review batches

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 s 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, and Scripts.

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.
	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

Object	View Name	Description	Conditions	Selected Fields	Sort order
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 Numbe,r Group Identifie,r 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	
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, Pro-	Bates Beg	

Object	View Name	Description	Conditions	Selected Fields	Sort order
			duction::Production Type, Sort Date, Email Subject, Email From, Email To, Responsive Designation, Privilege Designation, Confidential Designation, Issue Designation		
Desposition / 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	
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.

2.6 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 OCRed 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 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 overlayed 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	Returns only documents with	Extracted Text	is set	none	N/A	

Folder name	Saved search name	Description	Field	Operator	Value	Boolean operator
Text Only	extracted text.					
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.
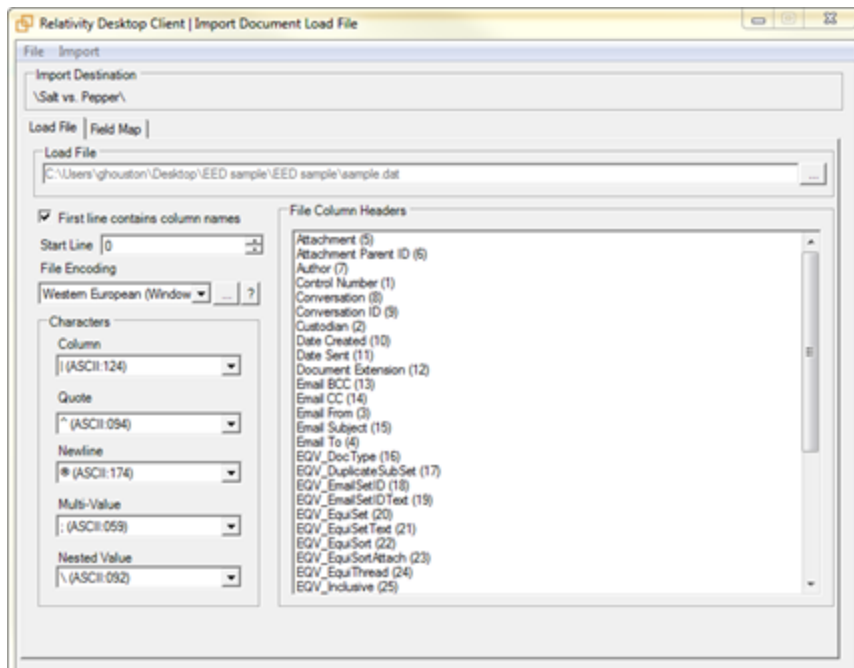
Click on the **Field Map** tab to line up your fields to load.

- 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.
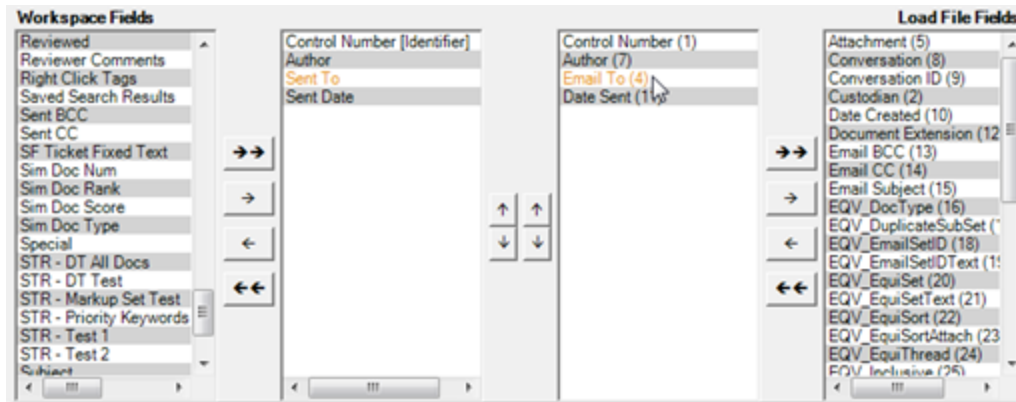
You can choose to append new data or overlay data on already existing records by changing the settings below the field lists. If you overlay records, you must select the identifying field for the overlay. It can be any fixed-length text field that is indexed. However, the best method for overlaying data 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.
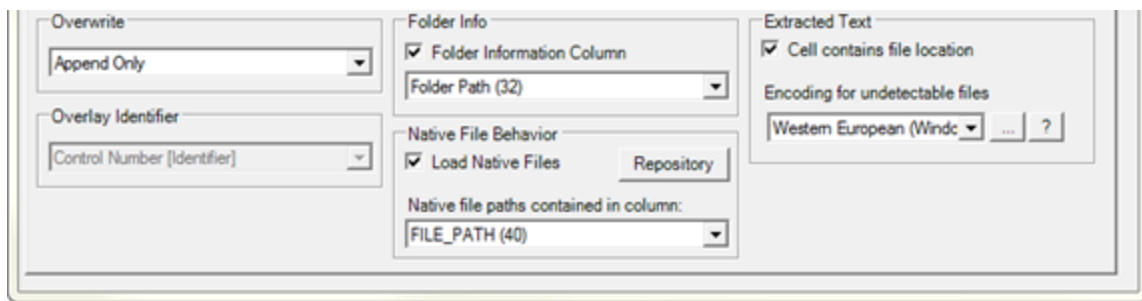
Use the Advanced button under Native File Behavior to copy the native files from a disk or link to files already on a image server.
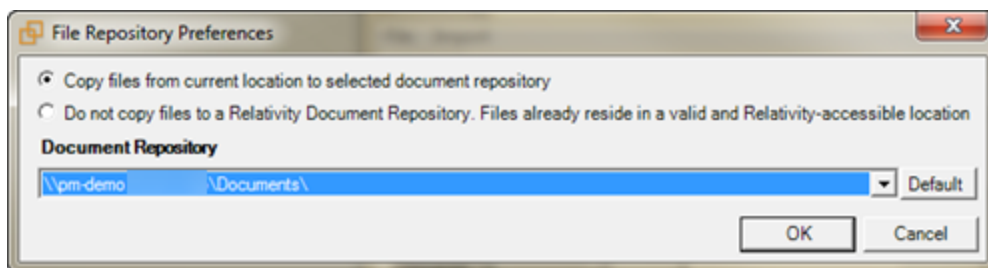
The extracted text option is where you indicate that the extracted text is available in a separate file. Only a file path is needed if this is checked. If this isn't checked the extracted text data is expected in the load file.

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-	Category field extracted from the metadata of the file by pro-	Y	Y

Field Name	Type	Description	Group By	Pivot
	Choice	cessing vendor		
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)		
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	The date and time at which an email was created.		

Field Name	Type	Description	Group By	Pivot
Date/Time				
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 Attach-ments	Yes/No	The yes/no indicator of whether an email has children (attach-ments).		
Email Folder ID	Long Text	The folder path in which a custodian stored an email.		
Email Format	Single Chocie	The indicator of whether an email is HTML, Rich Text, or Plain Text.		
Email Last Modi-fied 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
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		

Field Name	Type	Description	Group By	Pivot
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	Date	The date on which a loose file was last accessed.		
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	Long	The time at which a meeting item in Outlook or Lotus Notes		

Field Name	Type	Description	Group By	Pivot
Time	Text	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 Length: 255	Company field extracted from the metadata of the file		
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	The time at which an email message was received.		

Field Name	Type	Description	Group By	Pivot
	Text			
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***		
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 of parent document propagated to entire family group. Generally the		Y

Field Name	Type	Description	Group By	Pivot
Date		Date Sent field is used for email and date modified field is used for documents.		

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 a production was sent	Y	Y

Relativity

Field Name	Type	Description	Group By	Pivot
Date				

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
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

Security	Level 1	Level 2	Level 3
Search Terms Report	None	Edit/Add	Delete/Add/Edit Security
Search Term-sResult	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
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

Security	Level 1	Level 2	Level 3
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
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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