Relativity®

User Guide

June 13, 2025 | Version 12.3.857.3

Table of Contents

1 User guide overview

When working with Relativity as a reviewer, it's important to familiarize yourself with the software's many features.

This guide outlines Relativity's capabilities and walks you through how you can best use Relativity for document review, from logging in to creating a word index inside a workspace.

1.1 Navigation

Relativity is a complex application with many screens and functions. This section describes the Review Interface you use to review documents as well as some of the standard procedures you'll need to perform as you use the product.

1.1.1 Logging in

Relativity offers several ways to log in and it's possible to have two or more methods available to you. Your system admin will provide you with all the information you need to log on. Contact your system admin if you have additional questions.

For procedures to log in, see Logging in to Relativity.

1.1.2 Tab navigation

When you log in to Relativity, you see tabs displayed in the Sidebar on the left side of the page. You may also be able to access tabs using the Tab strip which runs horizontally across the top of the page. The Sidebar and Tab strip display the currently available tabs whether you are on the instance or workspace-level. The active tab in the Sidebar is indicated by the tab icon displaying in orange and in the Tab strip, the active tab is indicated by an orange line displaying under the name.

The tabs are arranged based on the Order value for each tab.
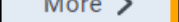
You can navigate tabs using the following features.

1.1.2.1 Sidebar

The Sidebar allows you to place tabs that you commonly use on the left-side of Relativity so that you can access them at your convenience.

Tabs are ordered from top to bottom of the Sidebar based on the value entered in **Order**. The lowest Order value displays at the top and the highest value displays at the bottom.

The total number of tabs that display in the Sidebar is determined by the resolution of your browser. Tabs that have been assigned to the Sidebar and do not fit, are available by hovering your cursor over the More ❯ icon. If a tab has one or more child tabs, you can view and select those tabs by hovering over the parent tab's row in the fly-out menu.

The More icon will display with an orange bar on the right side to indicate that the active tab is located in the More menu.
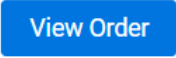
To add a new or pre-existing tab to the Sidebar, toggle the **Show in Sidebar** on and click **Save**.

Tab Location

Show in Sidebar * [toggle on]

Icon * [dropdown]

Parent [dropdown]

Order * [text field] **View Order**

Tabs can display in the Sidebar with their name and icon. Alternatively, to reduce the width of the Sidebar and increase the number of icons that can display, you can click the Collapse icon to only display the icon for each tab.

1.1.3 All tabs menu

Click the ⟦≡⟧ icon at the bottom of the Sidebar to display the All tabs menu. Every child tab that a user can view, as determined by their permissions, will display in the menu in alphabetic order. This menu does not display parent tabs.
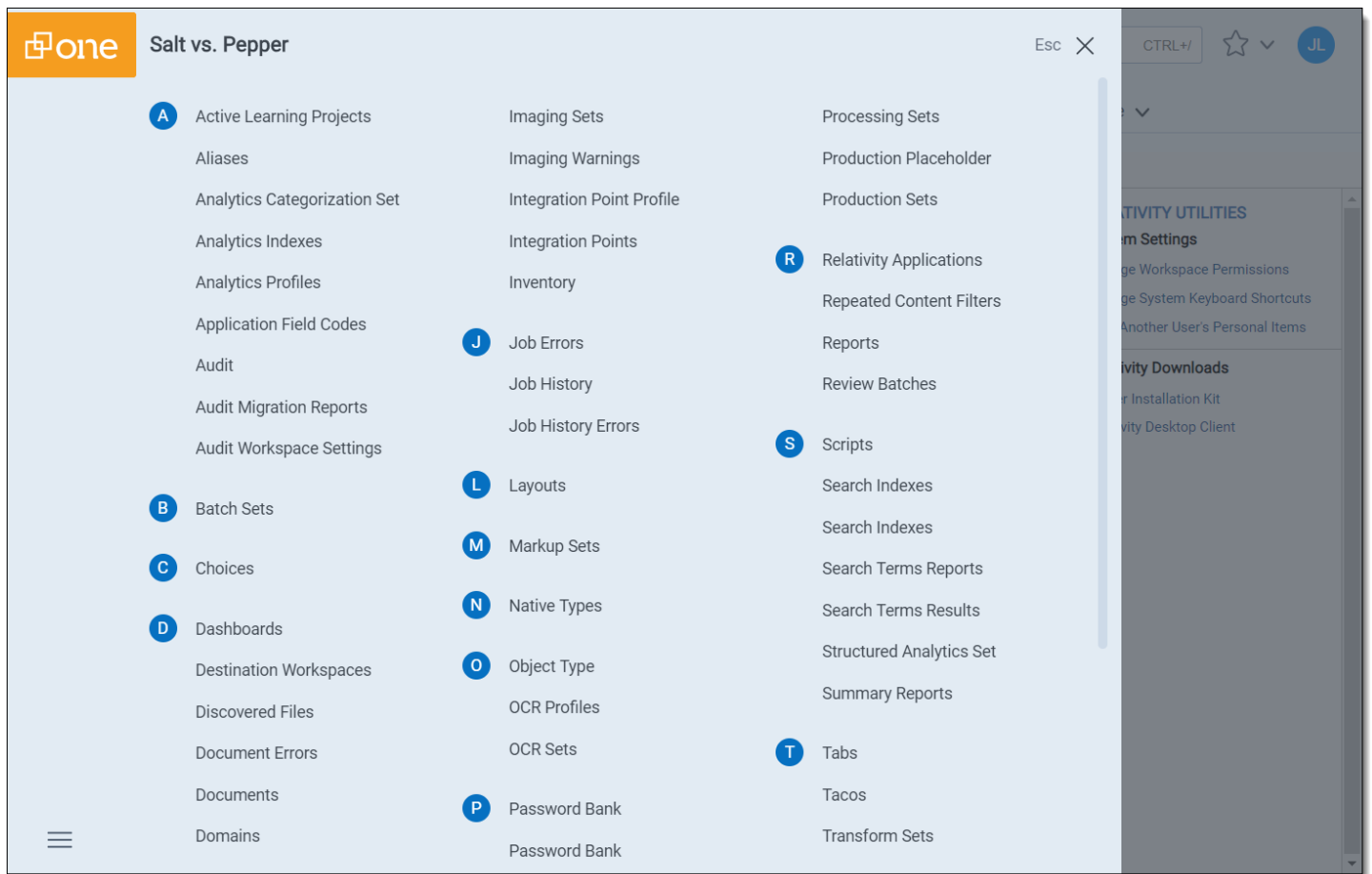
1.1.4 Tab strip

If you select a tab that either has child tabs or is a child tab to a parent tab, the Tab strip will display horizontally across the top of Relativity. If a tab in the Tab strip has one or more children tabs, hover your cursor over it to view and select the desired tab. Depending on the size of your browser, there may be more tabs than can display in the Tab strip. You can hover your cursor over More ⌄ in the Tab strip to view additional tabs in a fly-out menu.

1.1.4.1 Parent and child tab display

Parent tabs can be displayed in the Sidebar or the Tab strip. Tabs that have child tabs in the Tab strip will display with an arrow on the right side.
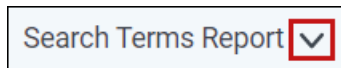
To view the child tabs of a parent tab in the Sidebar or Tab strip, hover your cursor over the parent tab and the child tabs will display in a fly-out menu.
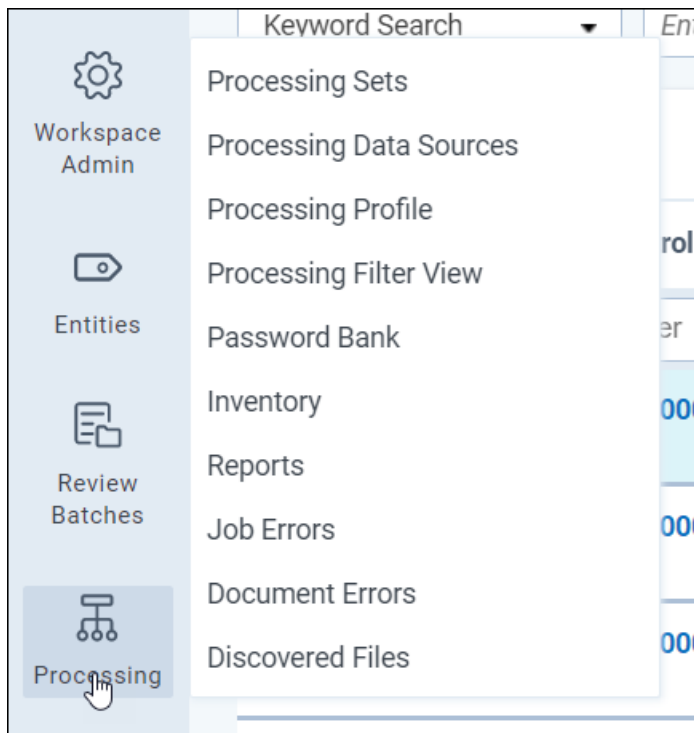
When you select a child tab (for example, Production Sets) from the Sidebar or the Tab strip, you are taken to that page. In addition to an orange bar displaying underneath the parent tab in the Sidebar, the child tab and the path to reach the active tab is highlighted in blue to help you track your location in the Sidebar or the Tab strip.
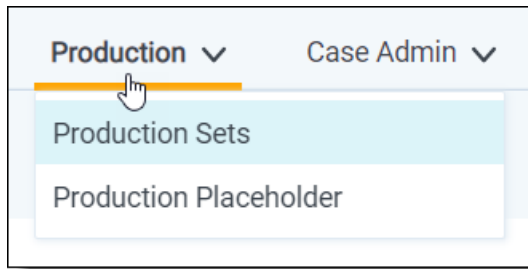
Instead of clicking the drop-down arrow, you can also click the parent tab itself. Clicking the parent tab takes you to the default child tab, which is identified by the Order setting for each child tab.

1.1.5 User options

When you first log in to Relativity, you see the default Home tab. Relativity displays the Workspaces tab as your default Home tab when you navigate to Home, but you can change the default Home tab to be any tab you want.

You can click your avatar in the upper-right corner to see the user drop-down menu. The avatar contains the initials of your first and last name

1.1.5.1 Changing the default Home tab

Relativity displays the Workspaces tab as your default Home tab when you navigate to Home, but you can change the default Home tab to be any tab that is available for default and that is not a specific tab within a workspace.

Perform the following steps to change the default Home tab:

1. Navigate to the **Tabs** tab.

2. Click on the tab you want to set as the default Home tab.

3. Click the ✎ in the row of the tab you wish to edit.

4. Toggle the **Set as Default Tab** field on.

5. Click **Save**.

Note: If a user is not a member of a group with permission to view the tab set as the default Home tab, Relativity redirects to the lowest ordered tab the user's permissions allow.

1.1.5.2 My settings

Clicking **My Settings** from within the user drop-down menu opens a settings mode pop-up, which displays your user information. Click **Edit** to change your settings.

My Settings

Save   Cancel

User Information

First Name: myfirstname
Last Name: mylastname
Email Address: test@relativity.com
Skip Default Preference: Normal
Default Filter Visibility: Visible

Item List Page Length: 100
Default Selected File Type: Viewer
Default Saved Search Owner: Public
Native Viewer Cache Ahead: ☑
User-Group Email Notifications: ○ All Emails
○ No Emails
● Only Failed Operations

- **First name** - your first name.

- **Last name** - your last name.

   Note: Your first and last name appear as your username throughout Relativity.

- **Email address** - your email address and login.

- **Skip Default Preference** - When reviewing documents, skip prevents a reviewer seeing documents that are already coded (depending on the selected view). Choose one of the following options:
    - **Normal** - this setting disables the skip feature.
    - **Skip** - this setting turns on the skip feature.

- **Default Filter Visibility** - determines whether or not the filters for columns in views display by default.
    - **Hidden** - hides filters by default.
    - **Visible** - displays filters by default.

- **Item list page length** - a numeric field indicating the default list length for all lists in Relativity. It can be set from 1 to 200.

- **Default Selected File Type** - the default viewer mode (Viewer, Native, Image, Long Text, or Production) used when first loading the Viewer. If the mode selected is not available, the Viewer will instead use the first available option. See Viewer on page 86 for details.

- **Default Saved Search Owner** - determines whether saved searches are public or private by default. If set to Public, the search is public and all users with rights to it can see it. If set to Logged in User, the search is private and only the logged in user is able to see it.

   Note: Depending on your permissions, you may not have rights to edit the **Default Saved Search Owner** field.

- **Native Viewer Cache Ahead** - if checked, this field pre-loads the next native document in your review queue when the active document is loaded.

- **User-Group Email Notifications** - user's preference for email notifications when adding or deleting Users or Groups.

- **All Emails** - receive all email notifications.

- **No Emails** - receive no email notifications.

- **Only Failed Operations** - receive email notifications on failed operations only.

> **Note:** Depending on your permissions, you may not have rights to edit the **User-Group Email Notifications** field.

After changing your settings as needed, click **Save**.

1.1.6 UI framework

In the UI framework, you can access dashboards and the search panel.

1.1.6.1 Dashboards

When you've created a page configuration you'd like to preserve, you can create a customized dashboard. You can save multiple dashboards to quickly change the page configuration. The item list and any widgets on the dashboard will update automatically in response to filtering or searching. Dashboards only report on data within the workspace you are in.

> **Note:** For a list of dashboards that provide an effective starting point for administrators to help review teams visualize their data set, see the Creating commonly-used dashboardsCreating commonly-used dashboards in the Admin Guide.
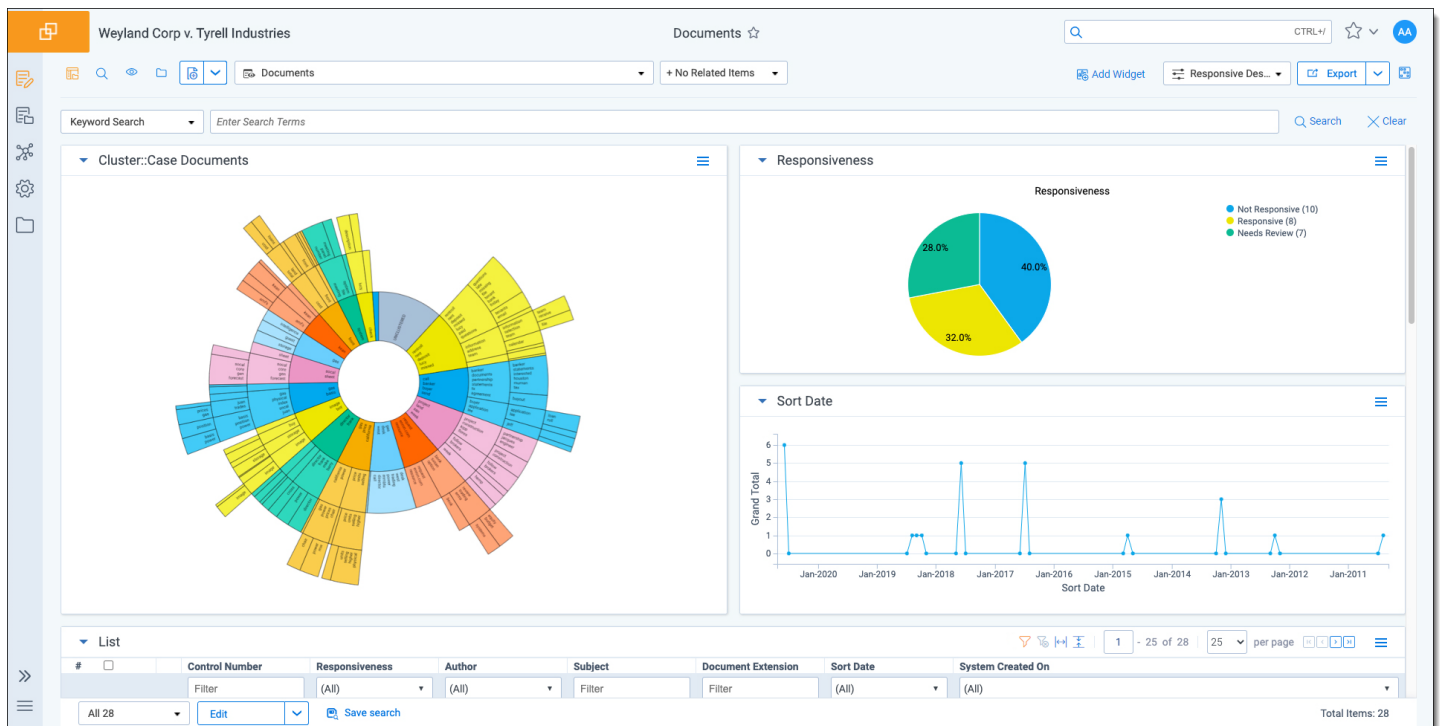
The page initially appears with the folder browser on the top left, the search panel on the bottom left and the item list to the right. Within this new framework, you have multiple options for customizing your display.

You can resize, move, or collapse any panel on the page, including any widgets you create.

- To resize any panel, hover over the line separating the item list from the panel until you see the mouse pointer change to horizontal arrows, then click and drag.

- To move, hover over the top of the panel until you see the ⊕ icon. Then, click and drag the panel to the new location.

- To collapse the search panel or browser pane, click the ▼ icon. Once collapsed, click the 🔲 icon to restore the browser pane or the 🔍 icon to restore the search panel.

Additionally, you can drag and drop panels to rearrange on the page. Click any panel and drag it to a new location. The other panels will automatically move to accommodate the panel you're dropping.

Dashboards and widgets can be copied over to newly created workspaces if they are part of a template. Dashboards only report on data within the workspace you are in if data is loaded in the workspace.

Note: You must have the correct workspace permissions to add, edit, or save a dashboard and to save pivot widgets to your dashboard.
You can also export individual Pivot widgets to Excel or to PNG format from each widget's context menu. See Exporting a Pivot widget in the Admin Guide for more information.

Note: To enable the Add Widgets button and Pivot functionality for an Relativity Dynamic Object (RDO), you must select Enabled for the **Pivot** property in the Object Type Information section for the object.

Creating a dashboard

To create a dashboard:

1. Click the **Dashboards** drop-down menu in the top right corner of the screen.

   Note: You can only access the drop-down if Pivot is Enabled for the given object type.

2. Click **New Dashboard** to save the current page configuration as a new dashboard.

3. Enter a name and an order number for the dashboard.

Note: The dashboard with the lowest order number will appear by default when you log in to Relativity.

Adding widgets to a dashboard

You can add the following widgets to customize your dashboard:

- **Pivot charts and tables** - You can use Pivot to summarize data in tables or charts to visually analyze trends in your data.

- **Cluster visualizations** - On the Documents tab, you can use Relativity Cluster Visualization to render your cluster data as an interactive visual map by adding a Cluster Visualization widget. This offers you a quick overview of your document cluster sets and quickly drill into each cluster set to view subclusters and conceptually-related clusters of documents. Please note that there may be only one cluster visualization widget per dashboard.

- **Communication Analysis** - After running the name normalization operation within structured analytics, you can use this widget to visualize communication frequencies, patterns, and networks between the entities linked to the documents in the view.

Note: When you reach the maximum number of widgets allowed on a dashboard, the **Add Widget** button will be grayed out and a tooltip displays when you hover over it that lets you know the reason you cannot add any additional widgets to your dashboard. This is controlled by the **MaxNumberDashboardWidgets** instance setting.

Saving changes to a dashboard

You can also make changes on the fly and save a dashboard with the changes. If a dashboard has not been saved, an orange notification displays in the Dashboard drop-down menu until it is saved.

1. Click the Dashboards drop-down menu in the top right corner of the screen to display the list of dashboards available on the current tab.

2. Click **Save** to save the changes to the existing dashboard. Click **Save As** to save the page configuration as a new dashboard, and then enter a **Name** and **Order** number.

Note: If a dashboard is part of a locked application, the option to save the dashboard is unavailable.

Deleting a dashboard

To delete a dashboard from the current tab you are in, click the icon to the right of the dashboard you want to delete in the Dashboards drop-down menu.

Click **Delete** in the Delete Dashboard Confirmation popup to delete the dashboard.

Note: If a dashboard is part of a locked application, the option to delete the dashboard is unavailable.

Renaming a dashboard

To rename a dashboard:

1. Click on the icon next to the name of the dashboard in the Dashboard drop-down menu.

2. Enter a **Name** and an **Order** number for the dashboard. The order number controls the order in which the dashboard displays in the list.

3. Click **Save** to save your changes.

Note: If a dashboard is part of a locked application, the option to edit the dashboard is unavailable.

1.1.6.2 Using the search panel

While working in the Document list in the new UI framework, you can use the search panel to filter your data.

1.1.7 Resetting your password

There are two ways you can reset your password if your system admin has given you the appropriate permissions. You can use the **Reset Password** option inside Relativity or the **Forgot your password?** link on the Relativity login screen.
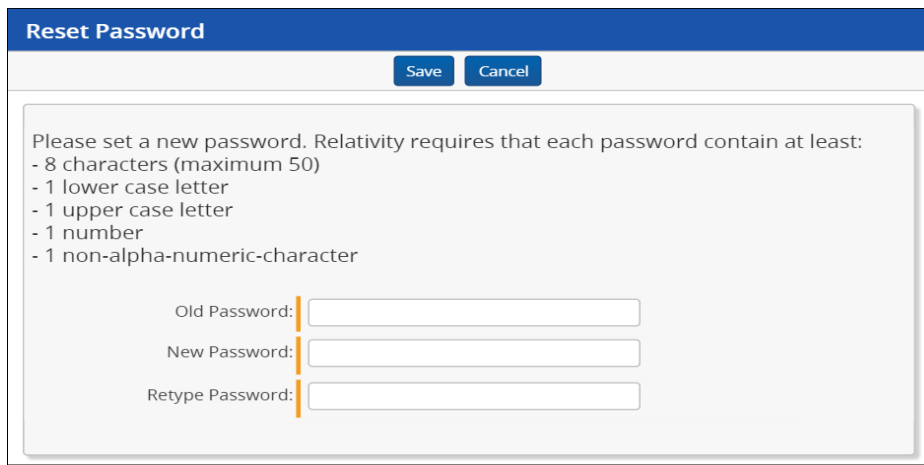
Note: If your password has expired, the Reset Password dialog appears automatically when you log in to Relativity. Your system admin determines when your password expires and the number of previous passwords that you can't reuse.

1.1.7.1 Resetting your password inside Relativity

If you're already logged in to Relativity, you can reset your password by clicking **Reset Password** in the Home drop-down menu. This directs you to a Reset Password pop-up.

Enter your old password, then enter and retype your new password. Click **Save**.
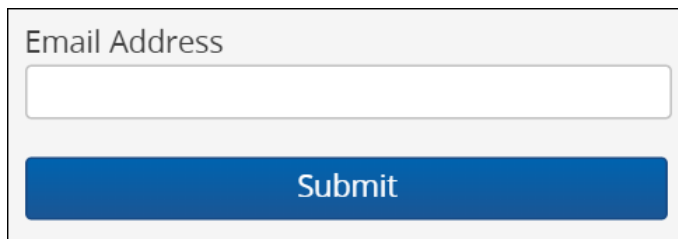
You can use your new password next time you log in to Relativity.

1.1.7.2 Resetting your password outside Relativity

If you can't log in to Relativity because you've forgotten your password, perform the following steps to reset your password.

1. Click **Forgot your password?** on the login screen.

2. Enter your email address in the pop-up.

   Relativity sends an email to the address you provide. You should receive this message within a few minutes. If you don't receive an email, check your spam or junk mail folder.

3. Click the link in the email to reset your password. This link will be active for 15 minutes and expires after that time. If the link has expired, or if you click the link more than once, you'll have to generate a new password reset request.

4. The link directs you to a page where you can create a new password.

5. Enter a new password and retype it, then click **Submit**. After your password successfully resets, you'll get a message prompting you to log in with your new password. An email will be sent to the address you entered, notifying you that your password reset was successful.

1.1.8 Favorites

The Favorites menu contains all your bookmarks (Favorites) and the last 10 pages in your browsing history (Recents).

The Favorites menu can be accessed by clicking the icon in the upper-right part of the page.
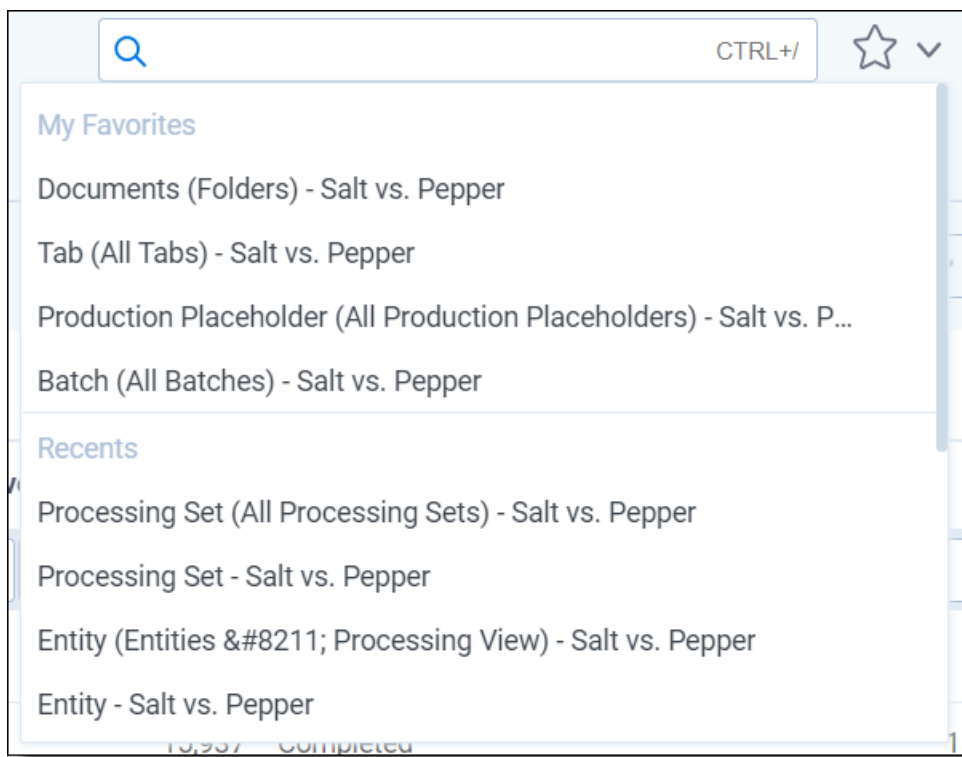
Use Favorites to quickly navigate the Relativity application. If you visit a particular page on a regular basis, minimize the number of clicks it takes to get there by adding the page as a favorite.

To mark a page as a favorite, click the star to the right of the breadcrumbs at the top of the page. The star turns yellow and Relativity adds the page to the Favorites section. Relativity doesn't limit the number of pages you can mark as a favorite.

Relativity records pages in the Recents section on each page load. That means that pop-up windows aren't recorded as Recents.

Note: If you're a system admin, you can turn off this feature by editing the RecentHistoryEnabled and FavoritesEnabled instance setting values. You can also change the number of Recents the Favorites menu displays by editing the RecentHistoryNumberOfItemsDisplays instance setting value.

1.1.9 Quick nav

Quick nav can be used to quickly search for and navigate to any workspace or tab in Relativity. To access quick nav, click Quick nav search box in the upper right corner of Relativity, or use the keyboard shortcut **Ctrl+/**.

Note: Verify that the quick nav Ctrl+/ keyboard shortcut works on custom pages. Contact Customer Support with any problems.

Open quick nav, and type the name of any tab or workspace.

Any tab or workspace that contains the character string within the name appears in the list of results. Results appear after you type more than one character, and they refine with each character you type. The results link you directly to the tab or workspace in Relativity.

Note: In Relativity terms, the search works the same as a leading and trailing wildcard search.

You can click on any result or use the up and down arrow keys to move through the results. Press **Enter** to navigate to the selected item.

Your search remains until the page is refreshed or you navigate to a new tab. The Esc key also clears your search from quick nav. If no text is entered in the quick nav search field, the Esc key closes quick nav. You can also click anywhere outside the quick nav window to close it.

Quick nav displays three types of results in the following order:

- **Workspace tabs** - lists all workspace tabs that fit the search criteria and are available with your permission settings.

  Note: This item only appears when you are in a workspace.

- **Admin Tabs** - lists all admin tabs that fit the search criteria and are available with your permission settings.

- **Workspaces** - lists all workspaces that fit the search criteria and are available with your permission settings. Click the workspace to go to the default tab for that workspace.

Quick nav results only reflect items available with your permission settings.

1.1.10 Quick nav functionalitysection

The following list highlights more features of quick nav functionality.

- Type the word "home" in quick nav to navigate to your default Home tab.

- Quick nav is enabled or disabled with the QuickNavEnabled instance setting.

- Quick nav is available to look up workspaces and admin tabs from Home for groups assigned the **Use Quick Nav** admin permission, and it is available to look up tabs in a workspace for groups assigned the **Use Quick Nav** workspace permission.

- The maximum number of returned quick nav search results is limited to any number between 2 and 50, but the default is 20. Use the QuickNavMaxResults instance setting to adjust the maximum number of results.

- The maximum number of searchable characters is 50.

1.2 Logging into Relativity

Relativity offers several ways to log in and it is possible to have two or more methods available to you. As a Relativity user, your system admin provides you with all the information you need to log in.

1.2.1 Logging in to Relativity with a password

1. Enter your **Username**.
2. Click **Continue**.
3. Enter your password.
4. Click **Login**.

Note: The **Forgot your password?** link only displays if the admin enables Allow Password Recovery via Email setting, for more information see the Authentication Guide.

1.2.2 Password

This method uses only a user name and a password. Your system admin provides you with the following:

- Login email address.
- Password request email.

Prior to logging in, if you have not already, create your password. See Creating or resetting a password on page 25.

To log in:

1. Navigate to the Relativity site.
2. Log in with your password. See Logging in to Relativity with a password above

1.2.3 Two-factor authentication

The two-factor authentication method requires a passcode in addition to the user name and password. The system emails you the passcode during login and is different each time. Your system admin provides you with the following:

- Login email address.
- Password request email.

Prior to logging in, if you have not already, create your password. See [Creating or resetting a password on page 25](#).

Prior to logging in, if you have not already, download the required two-factor authentication app. When using the authenticator app for the first time, Relativity will need to connect your profile to the app.

Note: When using email for two-factor authentication, your web servers must have access to the SMTP server so it can distribute emails and passwords to authenticate.

To connect your authentication app,

1. Enter your user name.
2. Enter your password.
3. On the Two-Step Verification Required step, click **Continue**.
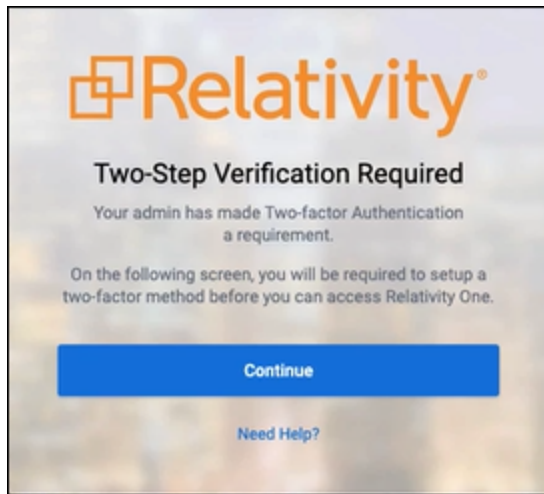
4. Open your authenticator app on your device.
5. In your app, tap the button to add a new account.

6. Hold phone up and scan the QR code provided by Relativity.

If you are unable to scan the QR code, click the **Can't scan QR code?** link below the QR code. Once clicked, a code will appear. Enter the code into your authenticator app on your phone. Once entered into the authenticator app, you can continue to the next step.

7. Click **Next**.

8. Re-enter your email and password.

9. Enter the authentication code in the app.

10. Click **Next**.

11. Click **Done**.

To log in with an authenticator app method:

1. Navigate to the Relativity site.

2. Log in with your password.

3. Follow the instructions on the app or enter the authentication code from the authentication app.

4. Click **Next**.

To log in with the Relativity email method:

1. Navigate to the Relativity site.

2. Log in with your password. An **Authenticate Login** dialog appears. The system immediately emails you a passcode, and the passcode will be different each time.

3. Enter that value in **Passcode**.

4. Click **Login**.

1.2.4 Active Directory

This method uses Microsoft Active Directory Domain Services to log in. You must log in from a computer within a valid domain. Your system admin provides you with the following:

- Login email address.

- An account on a Windows domain.

- Windows network password.

To log in:

1. Navigate to the Relativity site.

2. Enter your Relativity email address in **Username**.

3. Click **Continue**.

4. Enter your Windows network password in **Password**.
   Contact your system admin or IT department for password requirements.

5. Click **Login**.

1.2.5 Integrated Authentication

This method uses Integrated Windows Authentication to log in. There are no additional requirements to log in other than having a Windows domain account.

To log in, navigate to the Relativity site. The system automatically logs you in to Relativity. If you are not connected or if the Relativity logon dialog appears, contact your system admin.

1.2.6 RSA

This method requires an RSA SecurID token along with a username and passcode. Your system admin provides you with the following:

- Username

- RSA SecurID token

- (Optional) PIN

To log in:

1. Navigate to the Relativity site.

2. Enter your username in **Username**.

3. Click **Continue**.

4. Enter your RSA password in **Password** in the format set by your system administrator. This password is either:
   - The RSA tokencode, the eight-digit number from the RSA SecurID token hardware, if you have not been assigned or created a PIN

   - Your combined PIN and RSA tokencode without a space between them

5. Click **Login**.

You may also be asked to create or to reset your PIN. Follow the instructions on those screens.

1.2.7 OpenID Connect

This method requires you to have an OpenID Connect account. Your system provides you with the following:

- OpenID Connect account user name from the identify provider's side.

- Relativity OpenID Connect button name on the login page.

To log in:

1. Navigate to the Relativity site.

2. Click the Relativity OpenID Connect button name.

3. Enter your user name.

4. Click **Logon**.

5. Authenticate with your OpenID provider.

1.2.8 SAML 2.0

This method requires you to have an account with SAML 2.0 authentication provider set up by your system admin. Your admin provides you with a Relativity account with a SAML 2.0 login method.

To log in:

1. Log into the SAML 2.0 provider system.

2. Navigate to the Relativity instance using a shortcut in the SAML 2.0 provider interface or a bookmark in your browser. You are automatically logged in.

1.2.9 Creating or resetting a password

Use this procedure if you are logging in to Relativity for the first time or if you are resetting your password. Your system admin must send you a password reset email. If you forget your password, you can click the **Forgot your password** link on the login screen if it is available, or contact your system admin. In either case, the system sends you a new password email.

Note: If you are a system admin, the Password Reset Email will not be sent to you. For more information, see the Authentication Guide.

1. Within the password request email, click **Reset Password** or enter the full URL into your browser.

> We received a request to reset the password associated with this email address. Click the link below to reset your password. This link will expire after 15 minutes.
>
> Reset Password
>
> We recommend opening this link in Internet Explorer.
>
> You can also copy and paste the following text into your address bar:
>
> https://ml14.testing.corp/Relativity/Identity/ResetPassword?token=74a572da-60e1-4058-2ffe-20b36965c0f9
>
> If you did not request this change, contact your system administrator.
>
> Please do not reply to this email.
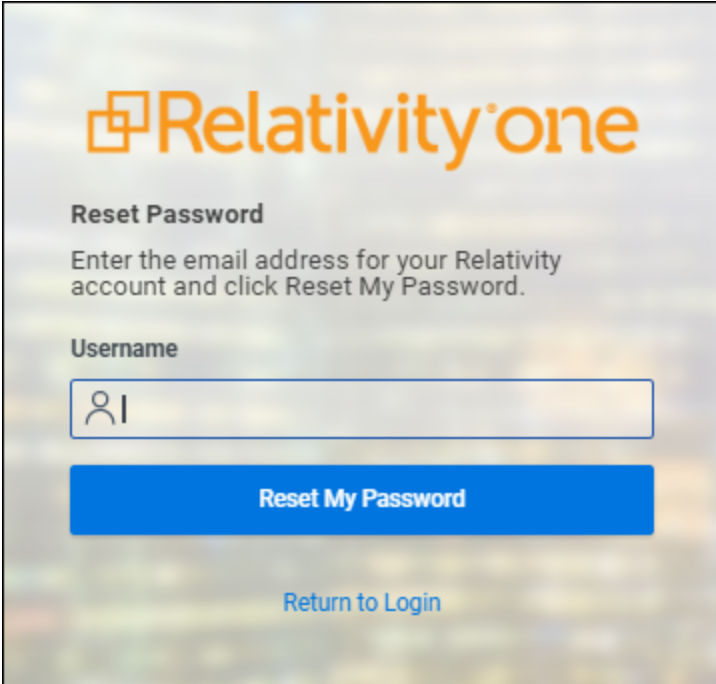
2. Enter a password following the restrictions listed on the screen. You must remember this password to log in. The link within the email is valid for 15 minutes, and you can only use the most recent email. Although, once the password is set, you do not have to log in immediately.

> **Note:** The following non-alpha-numeric characters are not allowed: \, ", <, >, £ in passwords.

Relativity one

Reset Password

Enter the email address for your Relativity
account and click Reset My Password.

Username

[👤 |]

Reset My Password

Return to Login

3. Click **Submit**.
4. Click **Return to Relativity**.

2 History

On the History tab, you can view the actions of users throughout the workspace. Relativity has a comprehensive audit system that logs actions that users perform, object types, timestamps, and other details. This tab also includes views and filters to help you navigate through the audit records.

If the workspace has been restored, ensure that Audits have been migrated properly. Also, ensure you have allowed viewing of audits at the workspace level for the group.

Note: When you view a document in the Review Interface, you can display its history in the related items pane by selecting the Document History icon.

2.1 History view fields

You can customize the views available on the History tab or create new views as necessary. The History tab includes pre-configured views for recently updated documents, long running queries, and imaging history, which you can modify.
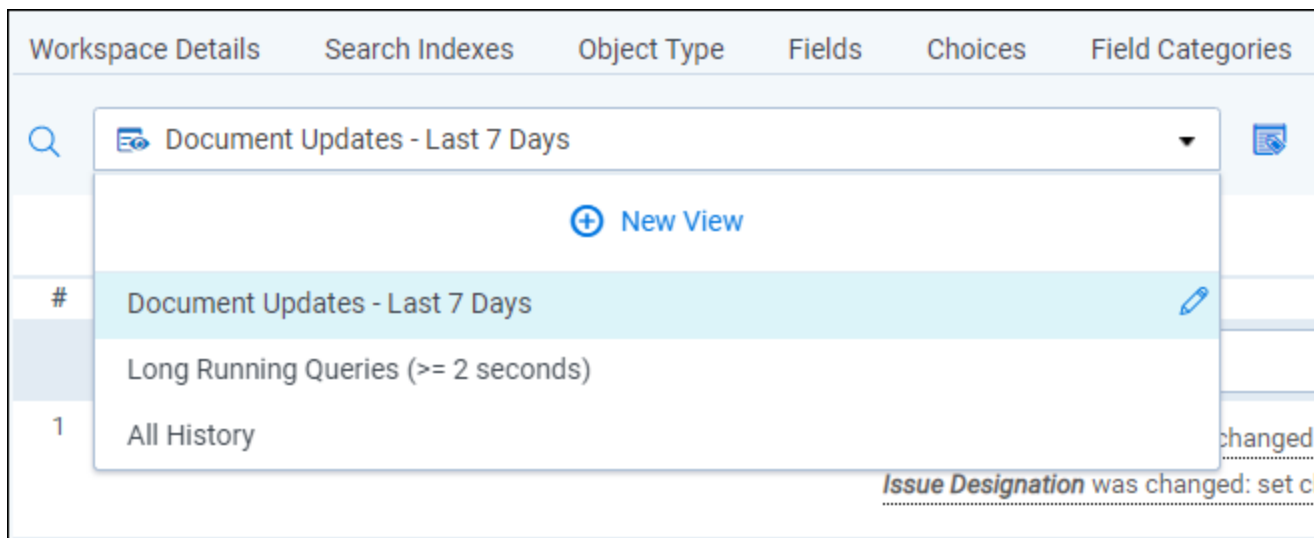
The following fields are available in views on this tab:

- **Action**—the user activity captured in the audit record.

- **Artifact ID**—the artifact ID of the audit action.

- **Details**—the detailed description of the audit action.

- **Execution time**—the length of time in milliseconds for a document query to run.

- **ID**—the identifier for the audited item; each tracked action has its own unique identifier.

- **Name**—the name of the object.

- **Object type**—the type of object.

- **Request origination**—the connection details for the user that sent the change request.

- **Timestamp**—the date and time when the audit action occurred.

- **User name**—the user who initiated the action.

You can export the contents of a view to Excel using ![Excel icon] at the top of the screen. Only the currently-loaded records are included in the Excel file. For example, in the following workspace, only 1,000 records would be included instead of the full 2,501 records.

Some features' history views are more detailed.

- For more information, see Saved search history in the Searching Guide.

2.2 Filters on the History tab

On the History tab, you can search for specific audit records by using filters just as you would on other tabs. For more information on filtering, see Filters in the Searching Guide.

You can also search for choice values using the **Details Filter**. Actions related to field choices are recorded using Artifact ID. To display the Artifact ID for choice values, click the **Choice Legend** icon in the view bar.

On the Choice Legend pop-up, you can search for choices in the workspace, their artifact IDs, and their associated fields. You can then enter Artifact ID listed for a choice value in the Details Filter and filter the audit records.

Note: You can also use views to filter audit records. See .

2.3 Audited actions

The following table lists audited actions in Relativity:

Note: If you perform a job while previewing a user's security settings, the audit action will be credited to your user name and not to the user whose security you were previewing when you started the job.

Action name	Description of activity
CaseMap - Add Document	A document was sent to CaseMap.
CaseMap - Add Fact	A selection of text from the viewer was sent to CaseMap as a fact.
Conversion Complete	A file was converted by way of a user clicking on a file link in the document list, running an imaging set, imaging on the fly, running a mass image operation, or switching to text or production mode in the viewer.
Create	An item was created.
Delete	An item was deleted.
Document Query	A query was run on a list of documents, or a document query was canceled. (A message indicating that a query was canceled is displayed in the details and on the Query Text pop-up.)
Export	The contents of a production set, saved search, folder, or subfolder were exported.
Images - Created	Images were created.
File Download	A file was downloaded through the Single Simple File Upload application. For example, a user clicked Download File on the Error Actions console of an individual processing error layout.
File Upload	A file was uploaded through the Single SimpleFile Upload application. For example, a user clicked Upload Replacement File on the Error Actions console of an individual processing error layout.
Images - Created for Production	Images corresponding to a production outside of Relativity were imported into the system.
Images - Deleted	Images were deleted.
Import	Content associated with a load, production, or image file was imported.
Markup - Image - Created	Redactions or highlights were added to an image.
Markup - Image - Deleted	Redactions or highlights were removed from an image.
Markup - Image - Modified	Redactions or highlights were moved, resized or edited on an image.
Markup - Native - Created	Redactions or highlights were added. This audit entry applies to transcripts only.
Markup - Native - Deleted	Redactions or highlights were removed. This audit entry applies to transcripts only.
Markup - Native - Updated	Redactions or highlights were moved, resized or edited. This audit entry applies to transcripts only.

Action name	Description of activity
Move	A document was moved from one folder to another.
Native - Created	A native file was loaded into Relativity.
Native - Deleted	A native file was removed from Relativity.
Pivot Query	A Pivot report was run, or a Pivot report was canceled. (A message indicating that a query was canceled is displayed in the details and on the Query Text pop-up.)
Print	A document was printed. (ActiveX viewer only)
Production - Add Document	A document was added to a production.
Production - Remove Document	A document was removed from a production.
Query	A process ran a query (such as categorization), or a query was canceled. (A message indicating that a query was canceled is displayed in the details and on the Query Text pop-up.)
RelativityScriptExecution	A Relativity script was run.
ReportQuery	A summary report was run.
Run	A file was imaged, saved as a PDF, or otherwise converted for viewing
Search Cache Table Creation	A search cache table was created. (Search cache tables are created the first time you search for a term or phrase using dtSearch or Relativity Analytics.)
Security	Security rights were assigned or changed
Tally/Sum/Average	The mass operation Tally/Sum/Average was run in the workspace.
Update	Document metadata was updated on a single-document basis. In addition, filters on information related to applications installed through the workspace or by an agent.
Update - Mass Edit	Document metadata was updated on a mass basis.
Update - Mass Replace	Document metadata was edited using a text mass replacement.
Update - Propagation	Document metadata was edited according to a propagation rule.
View	A document was viewed.
Workspace Upgrade	Details about scripts run on a workspace during an upgrade.

Note: No login action exists when you access a workspace. Relativity interprets the login based on any other auditable action in the workspace. For example, if you view a document in Workspace A, Relativity audits that view action on the History tab and indicates that a user accessed Workspace A.

2.4 Exporting the history list

You can export a history list view as a .csv file using the following steps:

Note: When Audit is installed, you can't export from the History tab.

1. Navigate to the **History** tab.

2. Select the history objects you would to export.

3. Click **Export to File**.

4. A pop-up appears. Select values for the fields:

    1. **Format**—select Comma Separated Values, .csv, which creates a comma delimited text file.

    2. **Encoding**—select the desired encoding for the output file.

    3. **Escape Formulas**—select yes or no. When you select yes, any line starts with the following special characters: =,@,+,-, or if the line starts with any combination of spaces before those characters, Relativity prepends a single quote to the line.

5. Click **Run** to export the file or **Cancel** to cancel the export.

3 Markups

Markups in Relativity refer to highlights and redactions. You can add markups to documents that contain an image using the Image Viewer. When you open a document in the Native Viewer that has not been imaged, select **Image on the Fly** from the Document actions menu to image the document which can then be opened in the Image Viewer.

> **Note:** If two people edit a markup at the same time, an error occurs.

3.1 Permissions

The following permissions are required to use markups:

Object Security	Tab Visibility
Document: View, Edit • Redact Document • Highlight Document	Documents

> **Note:** The Redact Document and Highlight Document allow a user to apply any redaction and any highlight respectively. For example, if the user has the Redact Document permission and not the Highlight Document permission, they can apply any type of redaction but they cannot apply any highlights.

3.2 Highlights

When you create a highlight, a colored box appears in the area you select, just like using a highlighter.

3.2.1 Creating highlights

To create a highlight, perform the following steps:

1. Click ![blue square] ∨ . Blue is the default color. Click the drop-down menu to select a different color.

2. Draw the highlight across the section(s) of text you want to highlight.

When you create a highlight, it appears in the Markup Navigation Pane. See Using the Markup Navigation pane on page 40.

3.3 Redactions
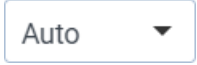
A redaction hides text on a page. In Relativity, you can create several different types of redactions:

- Creating basic redactions on the next page

- Creating inverse redactions on the next page

- Creating full-page redactions on page 34

- Creating mass redactions on page 34

When you create a redaction, it appears in the Markup Navigation Pane. See Using the Markup Navigation pane on page 40.

3.3.1 Creating basic redactions

To apply a basic redaction to a document, perform the following steps:

1. Click ■▾. The black redaction tool is the default. Click the drop-down menu to select a different tool. You can select from the following:

   - **Black Redaction** ■—creates a solid black box, like using a black marker. While you draw the box, a gray translucent fill appears.

   - **Cross Redaction** ⊠—creates a white redaction box black border and a black X from corner to corner.

   - **Text Redaction** T—creates a white redaction box with black text. The text will fill the box by default. To change the font size, keep the redaction box selected and click [Auto ▾], and then select a new font size from the drop-down menu. You can right-click a text box redaction to apply different text. See Editing redaction text on page 38. The system admin determines which text options are available.

   - **White Redaction** □—creates a solid white box with a gray border. The gray border won't be printed or produced.

2. Draw the redaction box(es) across the section(s) of the page you want to redact. You can draw in any direction.

3.3.2 Creating inverse redactions

An inverse redaction creates a black redaction across the full page except on the locations where you draw boxes. To create an inverse redaction, perform the following steps:

1. Click the Redaction Mode ▤▾ icon and select **Inverse Redact** from the drop-down menu.

2. Draw the inverse redaction box(es) across the section(s) of the page you do not want to redact. A blue cast indicates where the black redaction is created, and the white box indicates the area that is not redacted. You

can move or resize the white box using the controls. You can also highlight text that is not redacted.

> **CEC/DWR:**
> AB 29X provides the CEC with $35 million to provide customers with peak demand of 200kW or greater with TOU or RTP meters. The CEC has determined that it will only provide RTP meters. The CEC filed an emergency Petition to Modify D.01-05-064 to clarify language to reflect the language of AB 29X, i.e. all customers 200kW and above must install an interval meter.
>
> **Georgia Power RTP Program (See attached Power Point presentation):**
> Currently 1,650 customers are enrolled in Georgia Power's RTP program. Although this represents a small number of their total customers, it accounts for 1/3 of their load. Low turnover demonstrates high customer satisfaction with the program. To date only 12 participates have opted out. During critical high priced periods, up to 1000 MW of load responds, to the RTP program ensuring reliability is maintained.
>
> The program consists of two parts, Day Ahead (DA) and Hour Ahead (HA) hourly rates. Each provides the customer with hourly rates for a 24-hour period enabling the customer to see his/her cost of electricity for each hour of the day so that an informed decision can be made in regards to energy consumption. Both programs have minimum load requirements in order to participate. For the DA program, customers must have a minimum demand of 250 kW and for the HA program a minimum of 10 MW. Transaction costs require that a cutoff threshold be established. Small companies, those with small loads, don't value a 10-20% bill reduction, as do larger companies.

3.3.3 Creating full-page redactions

A full-page redaction creates a redaction across the entire page. To apply a full-page redaction, click the Redaction Mode icon and select **Full-Page Redact** from the drop-down menu. The black full page redaction tool is the default. Click the Redaction Type drop-down menu to select a different tool. You can select from the following:

- **Black Redaction** —creates a solid black box, like using a black marker.

- **Cross Redaction** —creates a white redaction box with a black border and a black X from corner to corner.

- **Text Redaction** —creates a white redaction box with black text. You can right-click a text box redaction to apply different text. See Editing redaction text on page 38. The system admin determines which text options are available.

- **White Redaction** —creates a solid white box with a gray border. The gray border won't be printed or produced.
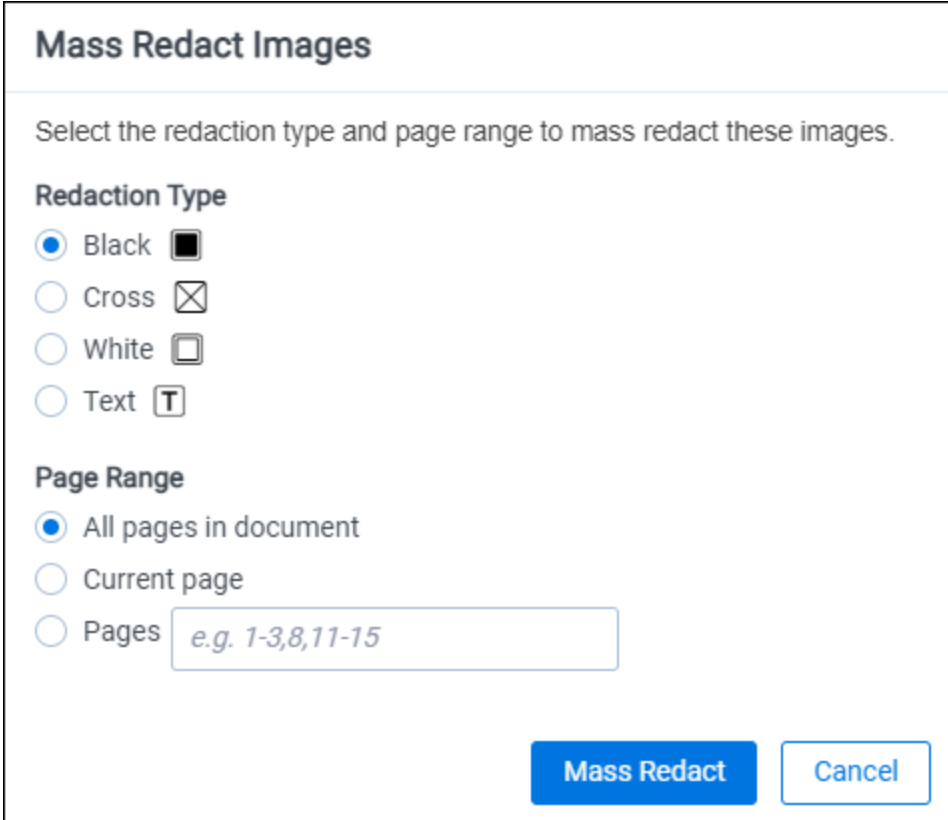
You can also create a keyboard shortcut to apply a full-page redaction. See Creating keyboard shortcuts in the Admin guide.

After you apply a full-page redaction, you can resize it to make it smaller than the full page and then work with it like a normal redaction. Additionally, you can create new redactions on top of a full-page redaction if desired.

3.3.4 Creating mass redactions

You can use the mass redact option to apply full-page redactions of any type to a set of pages in your document. To apply mass redactions, perform the following steps:

1. Click the Redaction Mode ![icon] icon and select **Mass Redact** from the drop-down menu. . The Mass Redact Options pop-up appears.

2. Select the type of redaction to apply. You can select from the following:

Mass Redact Images

Select the redaction type and page range to mass redact these images.

Redaction Type
- ⦿ Black ■
- ○ Cross ⊠
- ○ White ☐
- ○ Text Ⓣ

Page Range
- ⦿ All pages in document
- ○ Current page
- ○ Pages [e.g. 1-3,8,11-15]

[**Mass Redact**] [Cancel]

- **Black**—creates a solid black box, like using a black marker.

- **Cross**—creates a white redaction box with a black border and a black X from corner to corner.

- **Text**—creates a white redaction box with black text. In the Text Options section, you can select the font size and text to apply to the redactions. To apply custom text, select **<Enter Custom Text>** from the **Text** drop-down menu, then enter the text in the **Text** field.

- **White**—creates a solid white box with a gray border. The gray border won't be printed or produced.

3. Specify a range of images to apply the redaction to. Select **Pages** and enter a set of pages or select **All pages in document** to apply the full-page redactions to the entire document.

4. Click **OK**. The redactions apply to the set of pages you specify.

3.4 Editing markups

To re-size a single markup, click inside the markup shape. Blue dot controls appear on the corners and edges of the markup. Select any control and drag to re-size the markup. You can also re-size markups using the arrow keys. To re-size a markup in a larger increment, press **Shift** + the arrow key on your keyboard that points in the direction you would like to expand the markup. To re-size a markup in a smaller increment, press **Ctrl** + **Shift** + the arrow key on your keyboard that points in the direction you would like to expand the markup.

You can move markups individually or as a set. To select multiple markups on a page, click the selector tool and drag across the markups. Alternatively, press **Shift** or **Ctrl** and click to select individual markups, or click **Ctrl + A** to select all markups on an image. Controls appear on the corners and edges of all selected markups.

To move, click and drag the selected markups to a new location. You can also move selected markups using the arrow keys. To move a markup in a larger increment, press the arrow key on your keyboard that points in the direction you would like to move the markup. To move a markup in a smaller increment, press **Ctrl** + the arrow key on your keyboard that points in the direction you would like to move the markup.

3.5 Deleting markups

You can delete markups individually or as a set. To delete a single markup, right-click a markup and click **Delete**. You can also press the **Delete** key with a markup selected and click **Yes** on the Confirm Delete pop-up. For Mac users, press **Fn + Delete**.

To delete multiple markups, do the following:

1. You can use any of the following methods to select markups for deletion:

   - Left-click and drag the selection box over the markups you wish to delete.

   - Hold down on **Ctrl** on your keyboard, and left-click on each markup you wish to delete.

   - Right-click on a markup after selecting any other markups you would like to delete.

2. Select **Delete** from the right-click menu.
   The Delete Markups modal displays.

3. Verify that you wish to delete the number of markups displayed in the modal and click the **Delete X Markups** button.
   The selected markups are deleted.

Note: If you have a full-page redaction applied to an image, then you apply an additional full-page redaction, the most recently applied full-page redaction appears on top. If you then delete the second redaction, the first full-page redaction persists.

3.5.1 Working with overlapping markups

If you have multiple markups on a page that overlap each other, when you hover over the markups, translucent controls appear. Click the markup you want to work with, and the controls become active to indicate which markup is active. In the following example, the black box redaction is active.
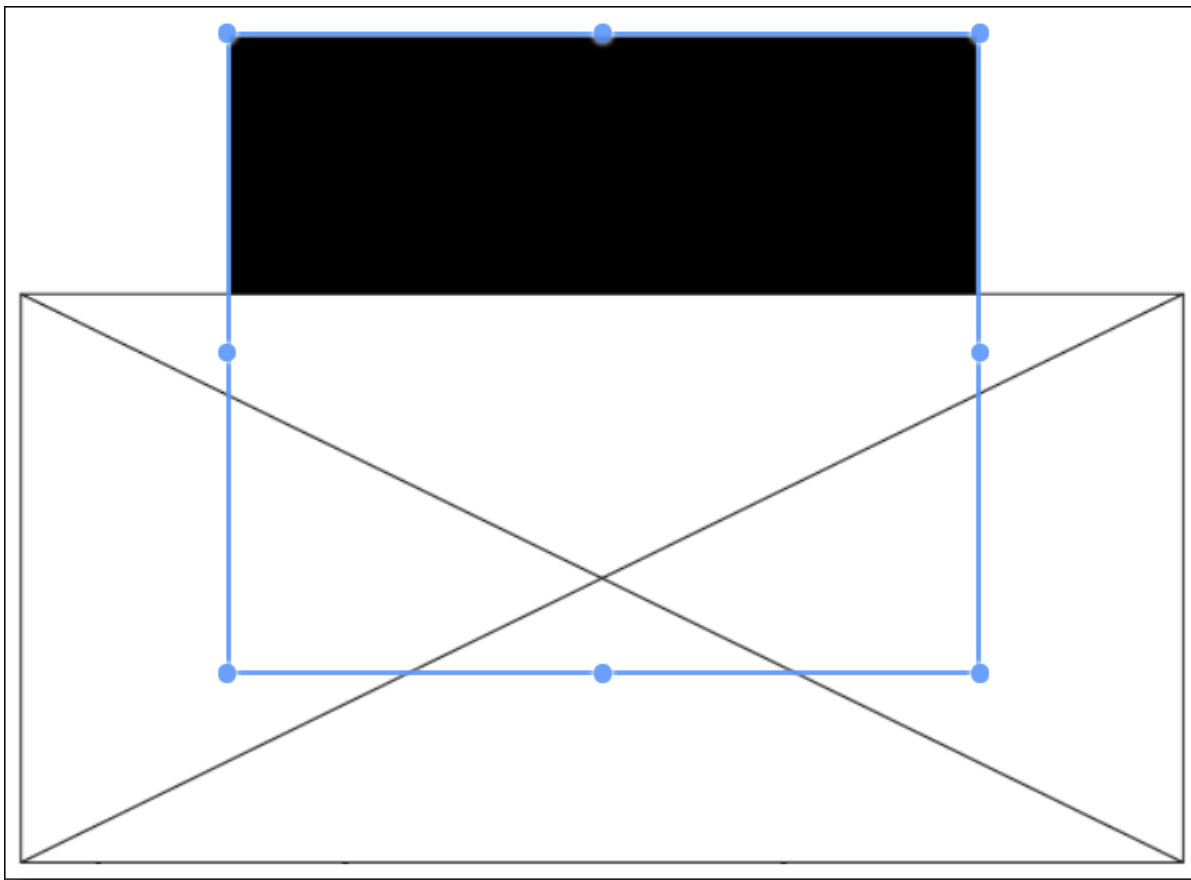
3.5.2 Working with markups outside of page boundaries

If you have markups that exist outside the boundaries of an image, such as those created by custom applications, they will render in their currently saved coordinates in the Viewer. Interacting with the markup by attempting to move or select it will move the markup within the page boundaries. This change is saved and audited in the workspace.
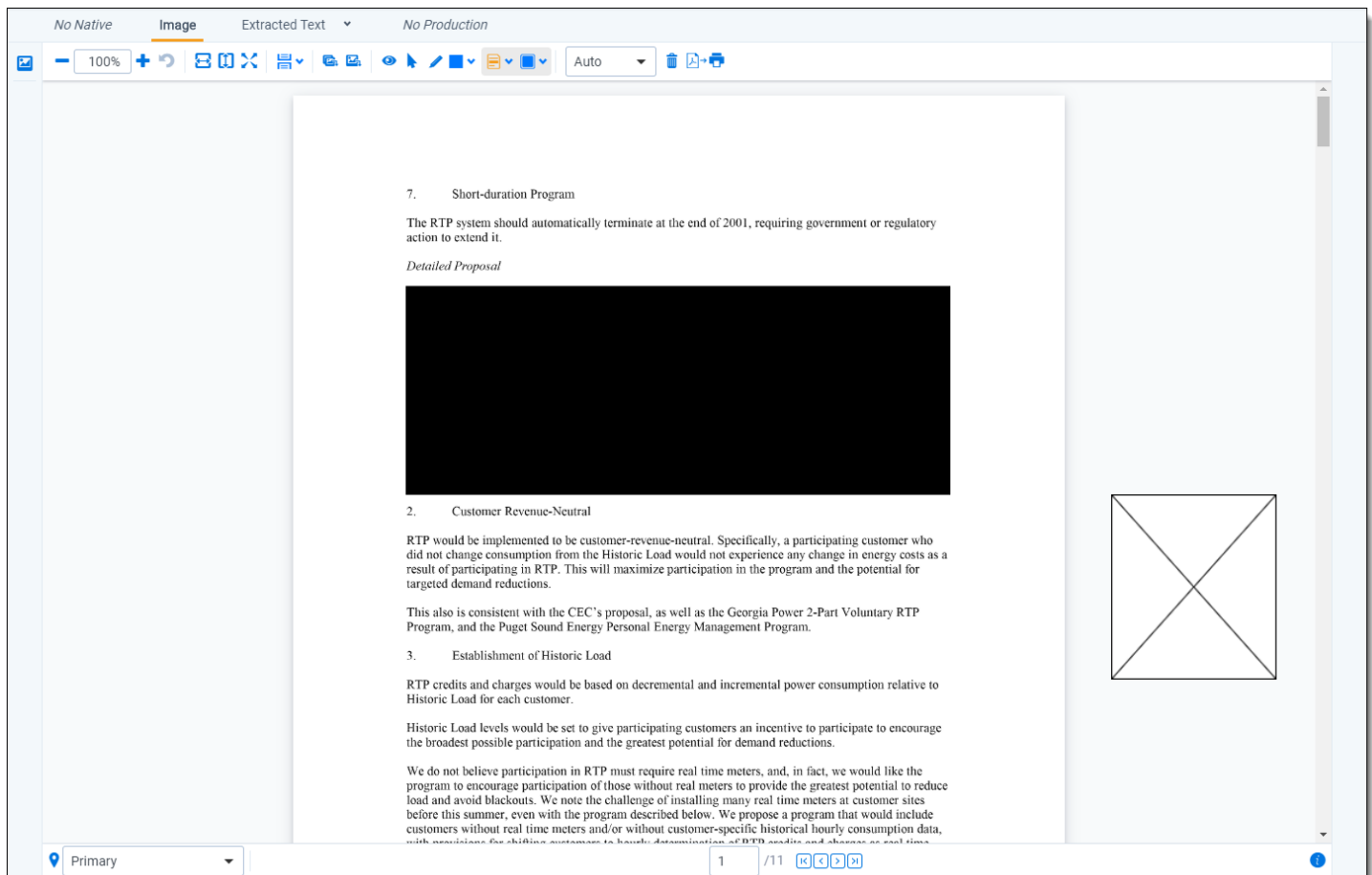
3.5.3 Editing redaction text with a markup set

When you create a text redaction, it will display the most recent word or phrase you entered while editing a redaction. If you have never edited or created a text redaction before, it will display **Redacted** instead.

To perform this task you need the permissions for the markup sets object as well as the individual markup set you wish to use.

To edit the text in a text box redaction using the default text for a markup set, perform the following steps:

1. Choose the desired markup set from the drop-down list in the bottom-left corner of the Viewer.

2. Right-click the redaction and select the default redaction text from the markup set.
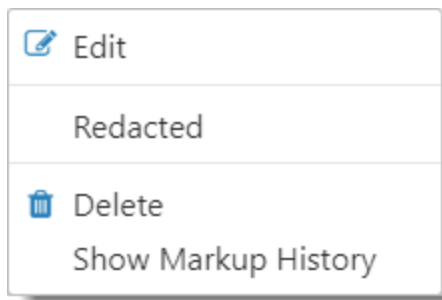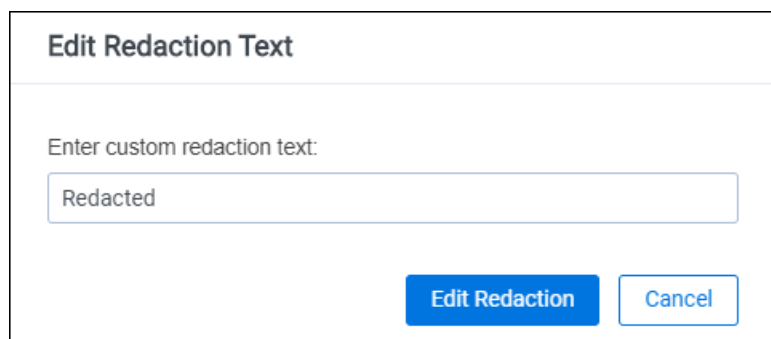
The new text appears in the redaction.

3.5.4 Editing redaction text

To edit the text in a text box redaction, perform the following steps:

1. Right-click the redaction and select **Edit**.

   The Edit Redaction Text pop-up opens.

   Edit Redaction Text

   Enter custom redaction text:

   Redacted

   Edit Redaction   Cancel

2. Enter the new redaction text in the field and click **Edit Redaction**.

   The new text appears in the redaction. Any new redactions you create will display the same text until you edit a redaction or use the default Redacted option.

3.5.5 Editing font size in text box redactions

The font size for text box redactions defaults to fill the entire text box. To edit the font size, perform the following steps:

1. Select the text box redaction(s). You can press **Ctrl** or **Shift** and click to select multiple text box redactions.
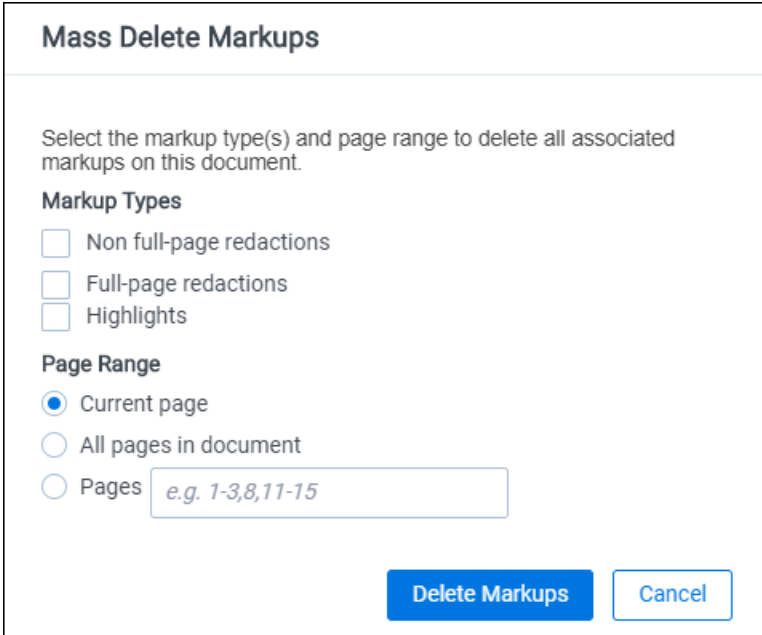
2. Click the Font Size Auto ▼ drop-down menu and select a font size. The font size applies to the text in all selected text box redactions.

When you create a new text box redaction, the last selected font size automatically applies to the text.

3.6 Mass deleting markups

You can mass delete markups from a single page, from a range of pages, or from your entire document at once using the delete redactions and highlights option. To mass delete markups, perform the following steps:

1. Click 🗑. The Mass Delete Markup pop-up appears.

Mass Delete Markups

Select the markup type(s) and page range to delete all associated markups on this document.

Markup Types
- ☐ Non full-page redactions
- ☐ Full-page redactions
- ☐ Highlights

Page Range
- ⦿ Current page
- ○ All pages in document
- ○ Pages [*e.g. 1-3,8,11-15*]

[**Delete Markups**] [Cancel]

2. Select the markup types you want to delete. You can select **Non full-page redactions**, **Full-page redactions**, **Highlights**, or any combination of these.

3. Select the range of pages from which to delete the selected markups. You can select **Current page**, **Pages** (enter a set of pages), or **All pages in document**.

4. Click **Delete Markups**. The selected markup types are deleted from the range of pages you selected.

3.7 Controlling markup visibility

You can toggle redaction visibility between visible, transparent, and invisible. Use the **Change Markup Visibility** button 👁 to change the setting.

- Click once to set the markups to transparent.

- Click a second time to set the markups to invisible. The redactions are not deleted, just temporarily hidden.

- Click a third time to return the markups to full visibility.

3.8 Viewing markup history

To view the history of any highlight or redaction, right-click it and select **Show Markup History**. The Markup Information pop-up appears with information identifying each action, the user who performed the action, and the date and time at which the action was performed.

3.9 Using the Markup Navigation pane

In the Viewer, you can locate markups in a document using the Markup Navigation pane. To open this pane, click 📍 in the lower left corner of the Viewer. The Markup Navigation pane displays a list of all redactions and highlights that reviewers created in the document, as well as references to their page numbers and parent markup sets.

Page Number	Markup Type	Markup Sub Type	Markup Text	Full Page	Markup Set
= ▾ Filter	Filter	(All) ▾	Filter	(All) ▾	(All) ▾
1	Redaction	Black			Primary
1	Redaction	Cross			Primary
1	Redaction	Text	Redacted		Primary
2	Highlight	Blue			Primary

Primary ▾   1   /11

You can click anywhere on the markup row to jump to the page where the markup occurs. In addition, Relativity updates the active markup set to the one associated with your row selection in the Markup Navigation pane.

4 Persistent highlight sets

With persistent highlight sets you can configure and apply term highlighting to assist with document review in the Viewer. In the Persistent Highlight Pane of the Viewer, you can see all sets saved in a workspace and apply or hide term highlights in the document you're reviewing.

If a document you're reviewing contains any of the terms specified in a set, the list of terms and the number of times they appear in the document appear under the set. If a document contains no terms from the set, you can't expand or collapse the set in the tree. If the document contains some terms in the set, only the terms that exist in the document appear below the set name.
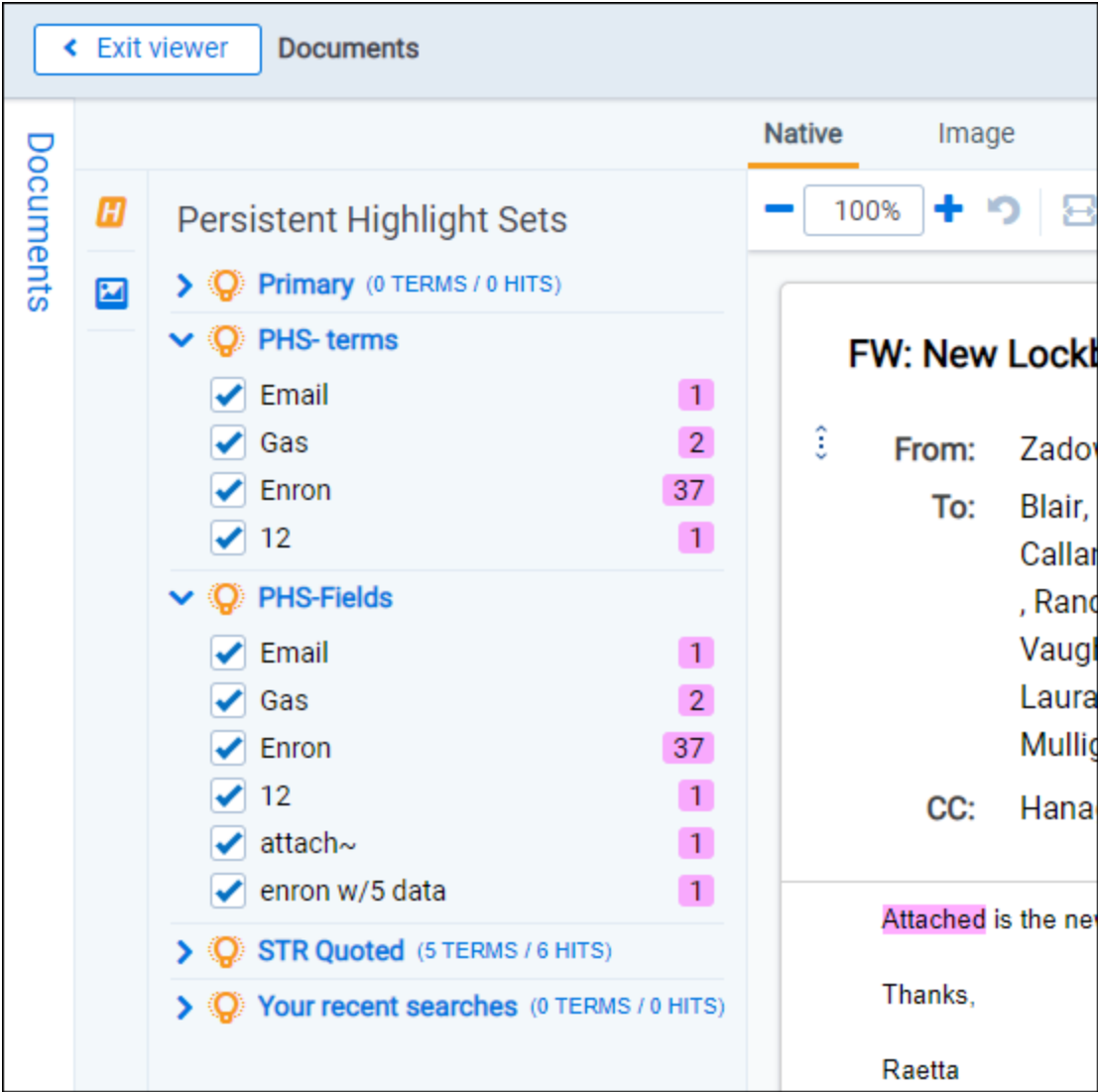
System admins can control which highlight sets different users see when working within a document. See Workspace security in the Admin guide.

Persistent highlight sets are independent of markup sets. See Markup sets in the Admin guide.

4.1 Getting started with persistent highlight sets

You create persistent highlight sets in the **Persistent Highlight Sets** tab of a workspace. Each set includes a list of terms populated manually or from a source field in the set configuration. After you create a persistent highlight set, the

set and its terms are available in the Persistent Highlight Pane of the Viewer.

The following persistent highlight set includes several terms with highlight color-coding. See Color-coding persistent highlights on page 52 for more information.

This set is available when a user opens the viewer and any edits made to this set are reflected immediately.

4.1.1 Showing and hiding persistent highlight sets in the Viewer

To view the list of available persistent highlights sets and related terms in the Persistent Highlight pane, click the Show/Hide Persistent Highlight Pane icon in the left drawer.

Native   *No Image*   Extracted Text   *No Production*

Search within Document 🔍

Consumers remain wary of deregulation, survey finds

10/23/2000
The Energy Report
(c) Copyright 2000 Pasha Publications, Inc. All Rights Reserved.

U.S. consumers are more aware than ever about electric restructuring, and
believe that market rates will rise despite what incumbent utilities are telling them,
according to a recent survey presented by Deloitte & Touche, an international
consulting firm.

In its annual Consumer Awareness Survey of Electric Deregulation,
Deloitte&Touche says that nationwide customer awareness about power choice
has jumped roughly 13% in one year, to 50.5%. Consumers in the West and the
Northeast, where competition already exists, have a better awareness of how
deregulation affects customers, particularly with electric reliability and rate
increases. Among consumers in the South, with little or no deregulation
experience, roughly 49% are aware of electric restructuring, representing no
increase from the previous year.

The survey, conducted in September 2000, reflects public reaction to the price
spikes in the market and the subsequent increase in electric bills,
Deloitte&Touche Director Branko Terzic said. When the prices rose, so did the
skepticism about deregulation, Terzic said, adding that utilities and state
regulators have a hard battle ahead of them to convince consumers that
competition will be beneficial.

Out of 600 people surveyed, 52.7% believe that if restructuring is completed in all
50 states, energy rates will increase, nearly a 10% jump from last year, when
consumer opinions were evenly split down the middle.

Some 35% believe that consumers will not benefit from electric restructuring,
despite "successes" in the several market regions, such as Pennsylvania, Terzic
said. While 29% believe that rates will decrease, if not immediately then

1   /2   ⟨ ⟨ ⟩ ⟩   View Similar Documents   ⓘ

Click the ❯ next to a persistent highlight set to expand it and show the list of terms from that set found in the
document. By default, all persistent highlight sets are enabled in the Viewer, and terms found in a document are
selected in the Persistent Highlight Pane and highlighted in the document. Click a persistent highlight set's name or
the 💡 icon to hide all term highlights from the set in the Viewer. When a persistent highlight set's icon is 💡 and the
terms appear partially transparent in the Persistent Highlight Pane, the term highlights for the set are hidden in the
Viewer.
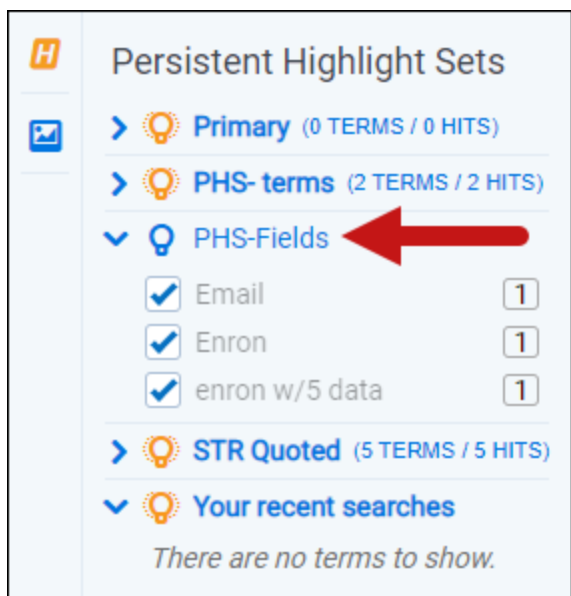
Clear a term's check box to hide its highlights in the Viewer. Select its check box to apply highlighting for the term in the Viewer again.

While using persistent highlight sets, you can determine whether terms that do not have any hits display in the Persistent Highlight Sets pane or not. If the Show terms with zero hits option is enabled, all terms in a persistent highlight set, including those with zero hits display in the Persistent Highlight Sets pane. If the Show terms with zero hits option is disabled, then any terms in a persistent highlight set that are not present in the current document will not display in the Persistent Highlights Set pane. For example, if you created a set named Investments that contains five highlight terms and have the Show terms with zero hits option disabled, only three of the terms show in the pane for a particular document, because the other two terms have no hits and thus, are not present in the document.
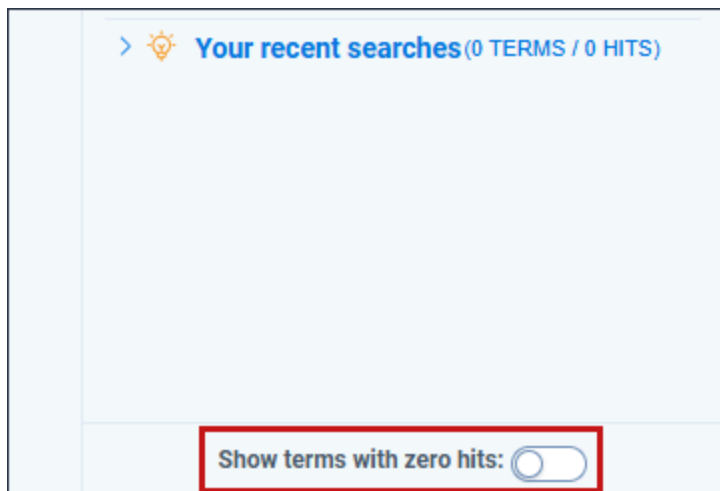
4.1.2 Navigating persistent highlight hits in the Viewer

You can navigate through the hits for a persistent highlight set or for a term while viewing a document in the Viewer. Click on either the persistent highlight set or the desired term in the Persistent Highlight Pane and the Go to Next/Previous Highlights icons display in the row.
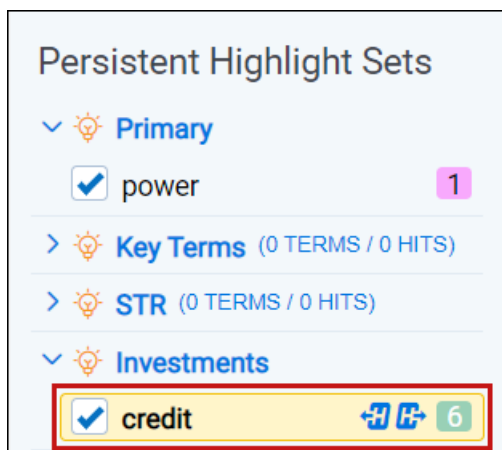
You can use the Next/Previous icons to cycle through the hits for either the persistent highlight set or the highlighted term. Regardless of where you are in a document, when you click the Next icon for the first time, you will be taken to the first highlight in the document for that persistent highlight set or term even if you've moved past it while browsing the document.

Clicking the Next/Previous icons also emphasizes the actively navigated highlight with an orange glow to help you track which one is active.
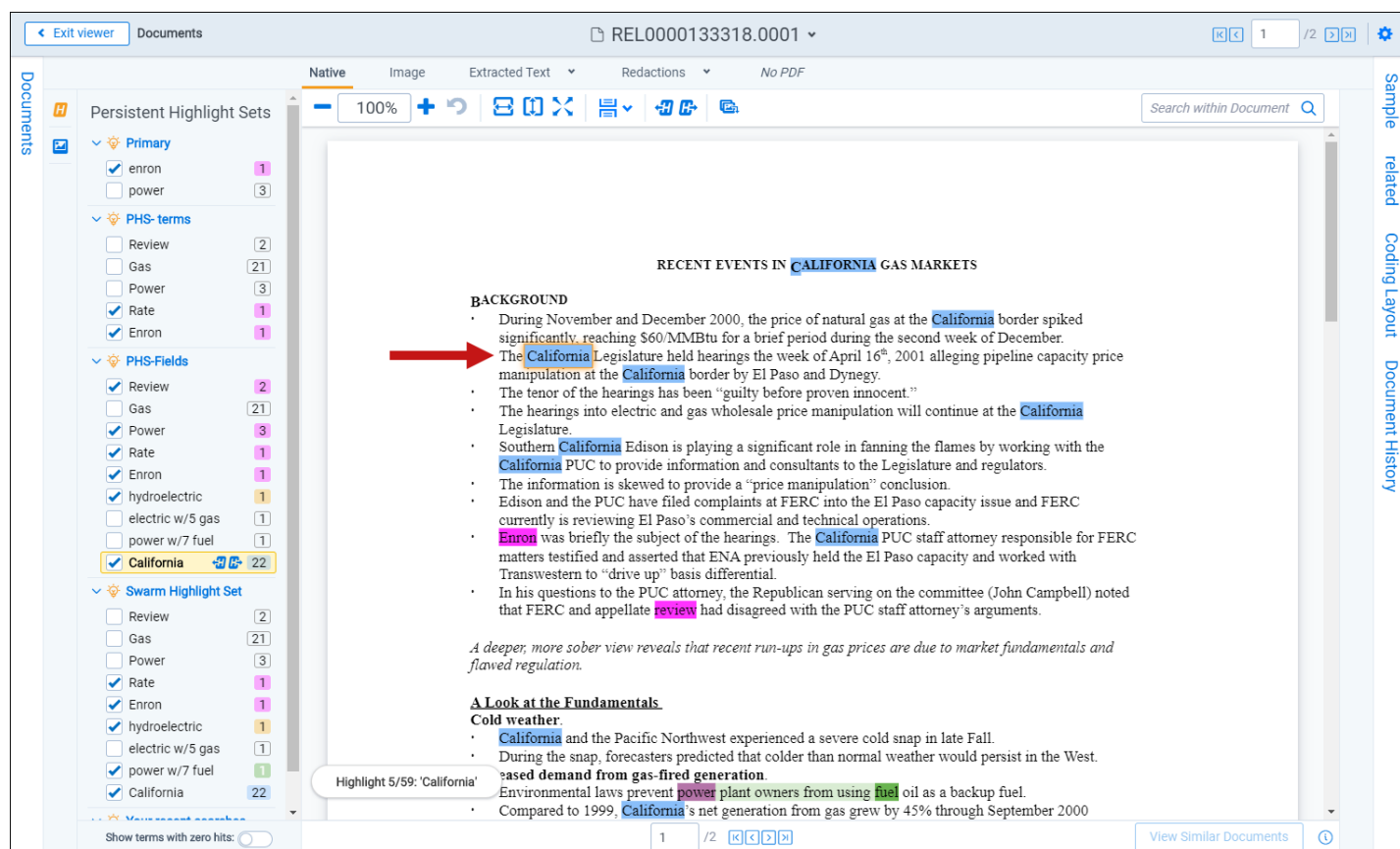
When you select a persistent highlight term in the Persistent Highlight Pane, in addition to highlighting all instances of that term in the body of an email, the Viewer also highlights instances of the term in the email header.
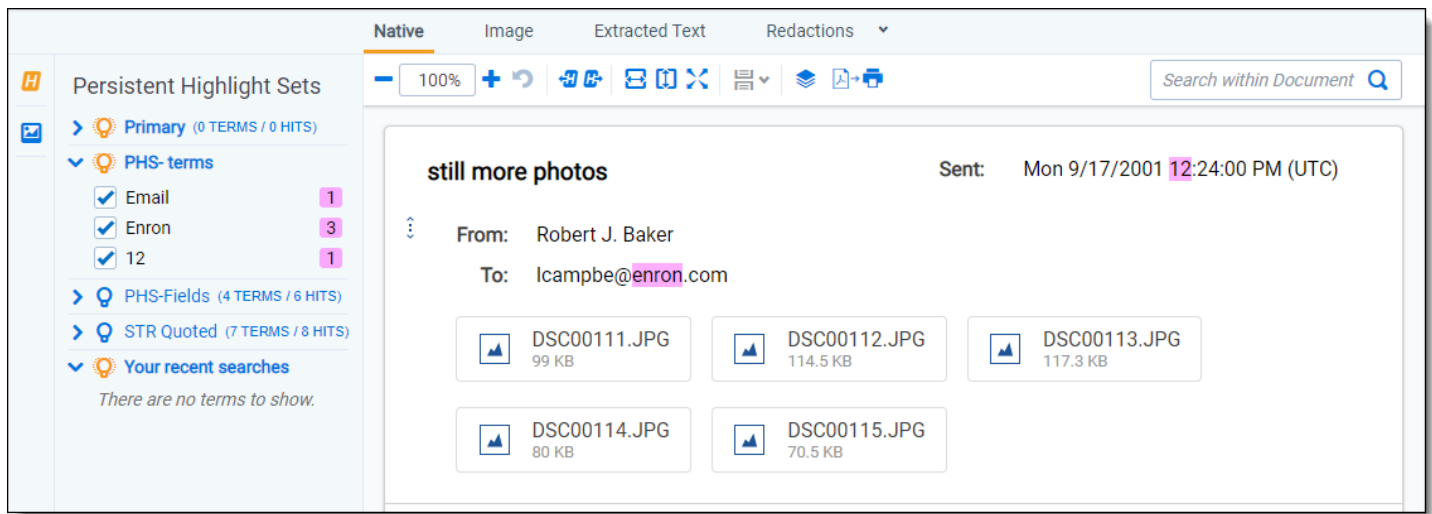
The number of terms and hits is listed to the left of the persistent highlight set's name. It is possible to have many highlight sets enabled but no highlights appear in a document.

Selections made in the Persistent Highlight pane persist throughout a user's session in Relativity. This includes any of the following changes related to the Persistent Highlight Pane in the Viewer:

- Showing or hiding the Persistent Highlight Pane.

- Enabling or disabling a persistent highlight set.

- Expanding or collapsing the term list for a persistent highlight set.

- Checking or clearing terms check boxes in a persistent highlight set.

4.1.3 Navigating highlighted terms in the Viewer

To navigate between terms highlighted on a document in the Viewer, use the **Go to Previous Highlight** and **Go to Next Highlight** icons on the Viewer toolbar.

The **Go to Previous Highlight** and **Go to Next Highlight** icons only navigate between terms enabled in the Persistent Highlight Pane.

When navigating through a document's highlighted terms, the following notification displays in the bottom-left to inform you that you've reached the beginning or end of the document and there are no more highlights.

Robert J. Baker, Ph.D.
Horn Professor
Department of Biological Sciences
Texas Tech University
Lubbock, TX 79409
phone: (806) 742-2702
fax: (806) 742-2963
rjbaker@ttu.edu

****

EDRM Enron Email Data Set has been produced in EML, PST and NSF for
licensed under a Creative Commons Attribution 3.0 United States License
<http://creativecommons.org/licenses/by/3.0/us/> . To provide attribution, pl

Reached the end of the document.

4.1.3.1 Actively navigated and inactive highlights

To support advanced highlights within persistent highlight sets, two types colors can be available in the Viewer -
actively navigated and inactive highlights. The colors are the same, but have a different level of opacity. Active
highlights are the highlights that the Viewer is focused on. Active highlights are at full opacity and inactive highlights
are at a lower opacity level. See Color-coding persistent highlights for more information.

Note: Beginning in Relativity 11.3.1, the auto-contrast feature has been added to color-coding persistent highlights.
This feature automatically determines the text color based off the background color you select to ensure readability
no matter which colors are selected. For example, if the background color is closer to black, the text will
automatically be white or if the background color is closer to white, the text will automatically be black.

Note: The opacity level of the highlights for proximity searching and inactive terms can be adjusted by editing the
value of the **ViewerHighlightStyleDefault** instance setting.

Color name	Highlight Color	Number
[Default]		0
Black		1
Dark red		2
Dark green		3
Dark yellow		4
Dark blue		5
Dark magenta		6

Color name	Highlight Color	Number
Dark cyan		7
Light gray		8
Gray		9
Red		10
Green		11
Yellow		12
Blue		13
Magenta		14
Cyan		15
White		16
Light green		17
Light blue		18
Light yellow		19
Light purple		20
Light red		21
Light orange		22
Purple		23
Orange		24
Dark purple		25
Dark orange		26

4.1.4 Persistent highlight set behavior across Viewers

Note the following regarding persistent highlight set behavior as the reviewer moves from document to document, changes Viewers, and uses pane toggles:

- Any changes made to a persistent highlight set tree in the panel when the Viewer is undocked, such as terms selected or unselected, will display when the Viewer is docked again.

- A synced standalone Viewer won't display changes made to a persistent highlight set, such as terms selected or unselected, in the pane of the main Viewer. However, Persistent Highlight Pane settings remain the same in the standalone Viewer as the reviewer goes from doc to doc within the standalone Viewer.

- The Persistent Highlight Pane maintains its current state when you swap Viewer panes.

- The Persistent Highlight Pane in the Extracted Text Viewer and Native Viewer are independent of each other. A change made to the pane in the Extracted Text Viewer is not automatically reflected when the reviewer switches to the Native Viewer and vice versa.

- Advanced persistent highlighting, available when using a search term report as a highlight field source, is only available in the Native and Extracted Text Viewer. See Using the highlight fields source on page 54.

See the Viewer documentation in the Admin Guide.

4.1.5 Persistent highlight behavior

When using a search term report that includes search syntax as a highlights source field, the highlight behavior is more inclusive than using persistent highlight terms. See Using the highlight fields source on page 54.

The different levels of opacity occur on a key term and interval term level. The key terms in the search are high opacity level highlights. The other interval terms picked up with search syntax are highlighted at a lower opacity level. For example, if you use the search "account w/5 cap" the words "account" and "cap" are highlighted with the full opacity highlight. The words between "account" and "cap" will have the lower opacity level highlight.
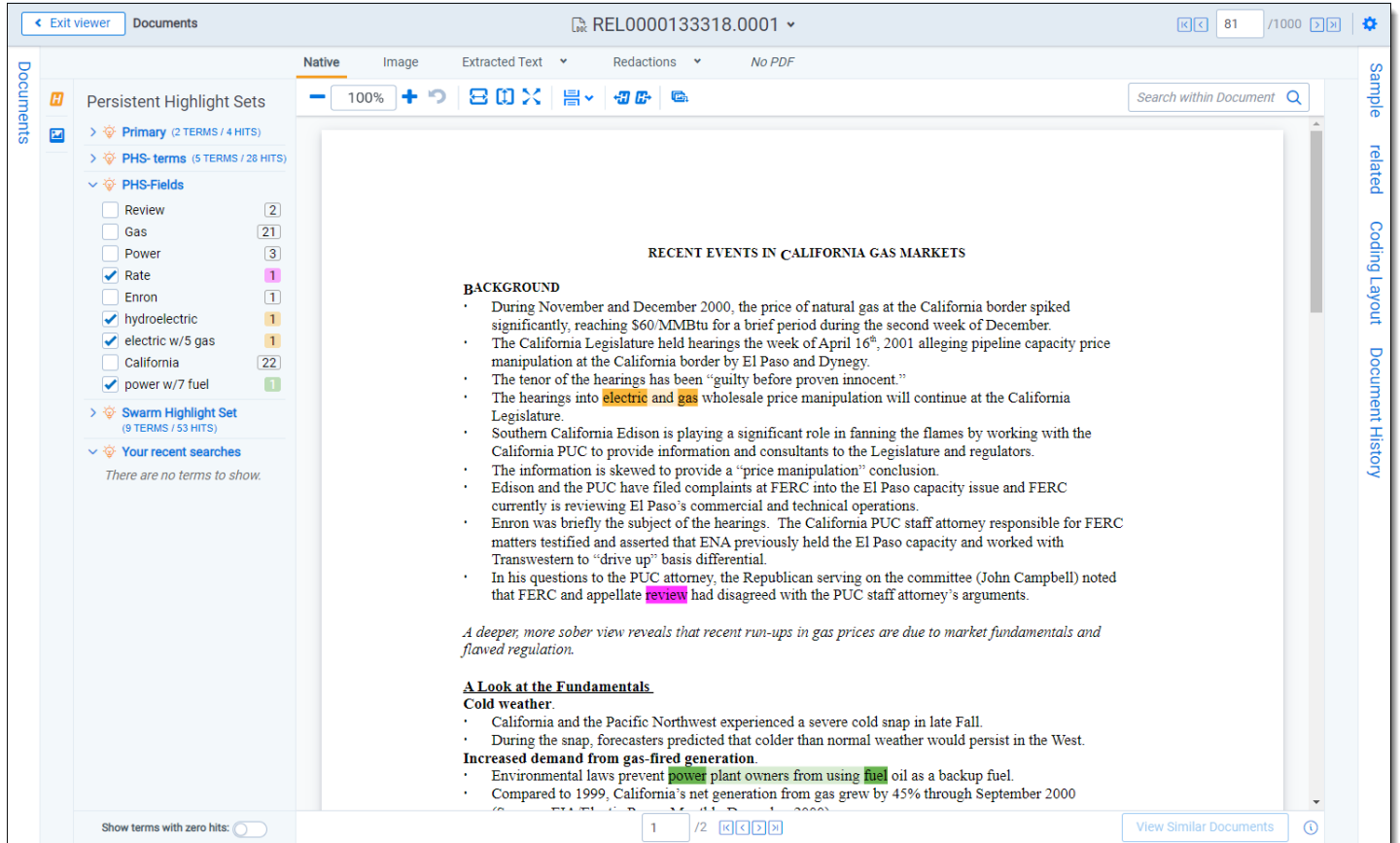
4.2 Creating persistent highlight sets

To create a new persistent highlight set, follow these steps.

Note: If you plan to use the Source: Highlight Fields, you may need to create a search terms report. For more information, see Using the highlight fields source on page 54.

1. Navigate to the **Persistent Highlight Sets** tab.

2. Click **New Persistent Highlight Set**.

3. Complete all required fields in the Persistent Highlight Set Information section. See [Fields below](#) for details.

4. Click **Save**.

> **Note:** Verify that reviewers are not actively reviewing documents when creating persistent highlight sets. Creating persistent highlight sets while reviewers are actively reviewing documents can cause errors.

4.2.1 Fields

Persistent highlight sets include the following fields.

- **Name**- the descriptive name under which you want this set to appear in the Viewer and item list.

- **Order** -the order in which you want this set to appear.

- **Source** - determines the area the set draws from when designating characters to be highlighted and displayed in the Viewer. There are two options:
    - **Highlight Fields** - designates fields as the source of highlighting. Highlight Fields is capable of using dtSearch functionality. Selecting this radio button means you must select a Highlight Field in order to save this set.

    - **Terms**- designates terms as the source of highlighting. Selecting this radio button means you must enter terms into the Terms field below to save this set.

- **Highlight Fields**- choose the field referencing the list of terms to be highlighted. Click the `Select` button to bring up the system view called Field Picker on Persistent Highlight Sets, which displays the Name and Object Type for applicable multiple object fields. It also includes those created by search terms reports. To select the desired Highlight Field, check the field's box, click Add, and click Set. The field displays on the layout. See [Using the highlight fields source on page 54](#).

> **Note:** If your search terms report is run against a dtSearch index with a customized alphabet file, the hits on the STR may not match the highlights rendered in the Viewer. Depending on how the alphabet file has been customized, you may see fewer highlight hits rendered in the Review Interface.

- **Terms** - enter terms you wish to highlight and select the color code to distinguish them in the Viewer. See [Entering highlight terms below](#).

4.3 Entering highlight terms

If you choose **Terms** as the source of your highlighting, you have to enter the terms in the Terms field text box to save the new highlight set. You also have the option of applying color-coding to these terms in the Viewer.

Persistent Highlight Set Information

Name *	Primary
Order *	0
Source *	○ Highlight Fields ● Terms
	Manage
Highlight Fields	Select
Terms	10;16;petroleum 10;16;gasoline 10;16;trad* 10;16;credit 10;16;internal

4.3.1 Color-coding persistent highlights

When you enter a term in the Highlight Terms box, you can also specify the color for both the text and the background. Use the following format to color-code your persistently highlighted text:

[background color];[text color];[term to be highlighted]

For example, enter "3;16;Relativity" to highlight Relativity with dark green background and white text.

> **Note:** Beginning in Relativity 11.3.1, the auto-contrast feature has been added to color-coding persistent highlights. This feature automatically determines the text color based off the background color you select to ensure readability no matter which colors are selected. For example, if the background color is closer to black, the text will automatically be white or if the background color is closer to white, the text will automatically be black.

Highlights are rendered at full opacity (using the original highlight color) when they are active. When they are not active, they will be rendered in a lighter shade of the original highlight color.

> **Note:** The opacity level of the highlights can be adjusted by editing the value of the **ViewerHighlightStyleDefault** instance setting.

The following table includes available color codes.

Color name	Highlight Color	Number
[Default]		0
Black		1

Color name	Highlight Color	Number
Dark red		2
Dark green		3
Dark yellow		4
Dark blue		5
Dark magenta		6
Dark cyan		7
Light gray		8
Gray		9
Red		10
Green		11
Yellow		12
Blue		13
Magenta		14
Cyan		15
White		16
Light green		17
Light blue		18
Light yellow		19
Light purple		20
Light red		21
Light orange		22
Purple		23
Orange		24
Dark purple		25
Dark orange		26

If you enter terms with no color-coding, the background defaults to magenta and black text.

Note: Default has different implications for text and background. The default background color is white and the default text color is black.

4.3.2 Guidelines for adding terms or phrases

Use the following guidelines when adding terms or phrases into the Terms text box:

- Enter a term that you want highlighted and press **Enter**. You can enter multiple terms but each one must be on a separate line.

- Enter terms for persistent highlighting exactly as they appear in the document. Don't use quotation marks and connectors.

Note: Quotation marks are not compatible with persistent highlighting with terms as a source, which automatically searches for an exact phrase. Quotation marks are compatible when using highlight fields as a source however. Using highlight fields as a source can result in slower document loading speeds.

- Keep lists simple. Do not use punctuation, special characters, or operators. Do not use dtSearch syntax when entering a list of terms as the source for the set. You may use dtSearch index terms in a search terms report, then use Fields as the Persistent Highlight Source instead to support highlights for dtSearch syntax.
  - AND or OR operators are not used in keyword searching. If used, Relativity looks for the exact phrase including AND or OR. For example, you entered these search terms: Apple AND Banana. Relativity highlights the entire phrase apple and banana in the document. Separate occurrences of apple, and occurrences of banana, are not highlighted.
  - Persistent highlight set terms do support wildcards. You can view highlighted terms that contain an * (asterisk) character, including a wildcard in the middle of a term. For example:
    - term* matches and highlights any word that starts with term with zero or more following characters.
    - *term matches and highlights any word that ends with term with zero or more preceding characters.
    - *term* matches and highlights any word that has term in it with zero or more preceding or following characters.
- Do not enter duplicate terms.
- Identify and remove terms with large hit counts.
- List variations of a term first and enter the root term last.
- If the list of terms is large (>100 terms), use Highlight Fields with a Search Terms Report. For more information, see Search terms reports on page 63.

4.4 Using the highlight fields source

Using the Highlight Fields source in a persistent highlight set you can choose a field referencing a list of terms to highlight.

Select the **Highlight Fields** option, and then click the Select button to open the Select items - Highlight Fields modal. This system view displays the Name and Object Type for applicable multiple object fields, including those created by Search Terms Reports.

Note: Persistent highlights generated by a search terms report don't automatically update after you load new data into a workspace. To incorporate the text from new documents, perform either a full or incremental build on the dtSearch Index, then a full or incremental build on the search terms report.

To select a Highlight Field, check the field's box, click right arrow to move it the right section. Once all of the desired fields have been selected, click **Apply**. The field appears on the layout.

Note: We recommend selecting a search terms report or the Domains field as your highlight fields source.

Select Items - Highlight Fields

#		Name	Object Type
		Filter	(All) ▾
1	☐	OCR Results	Document
2	☐	Domains (Email BCC)	Document
3	☐	Domains (Email CC)	Document
4	☐	Domains (Email From)	Document
5	☐	Domains (Email To)	Document
6	☐	Imaging Set	Document

1 - 10 of 39 | 10 ▾ per page

0 - 0 of 0 | 10 ▾ per page

#		Name	Object Type
		Filter	(All) ▾
		No data.	

Apply Cancel

When using a Search Terms Report as the highlight fields source, the number of terms that Relativity searches for will vary among different records. Relativity only looks for the terms listed in the Search Terms Report for that document.

#		Artifact ID				Control Number	STR - Search term report	Relativity Native Type
		= ▾ Filter				Filter	Filter	Filter
5	☐	1048583	✎	🔓	✉	REL0000073644	12 attach~ Email Enron enron w/5 data Gas	Outlook Email
6	☐	1102379	✎	🔓	✉	REL0000110895	Email Enron enron w/5 data	Outlook Email
7	☐	1079453	✎	🔓	✉	REL0000098527	Email Enron enron w/5 data	Outlook Email
8	☐	1134400	✎	🔓	✉	REL0000131183	attach~ David Email Enron enron w/5 data Power	Outlook Email

Relativity exhibits similar behavior when using an email Domains field as the highlight fields source. Relativity only looks for the email domains listed in the field for that document.
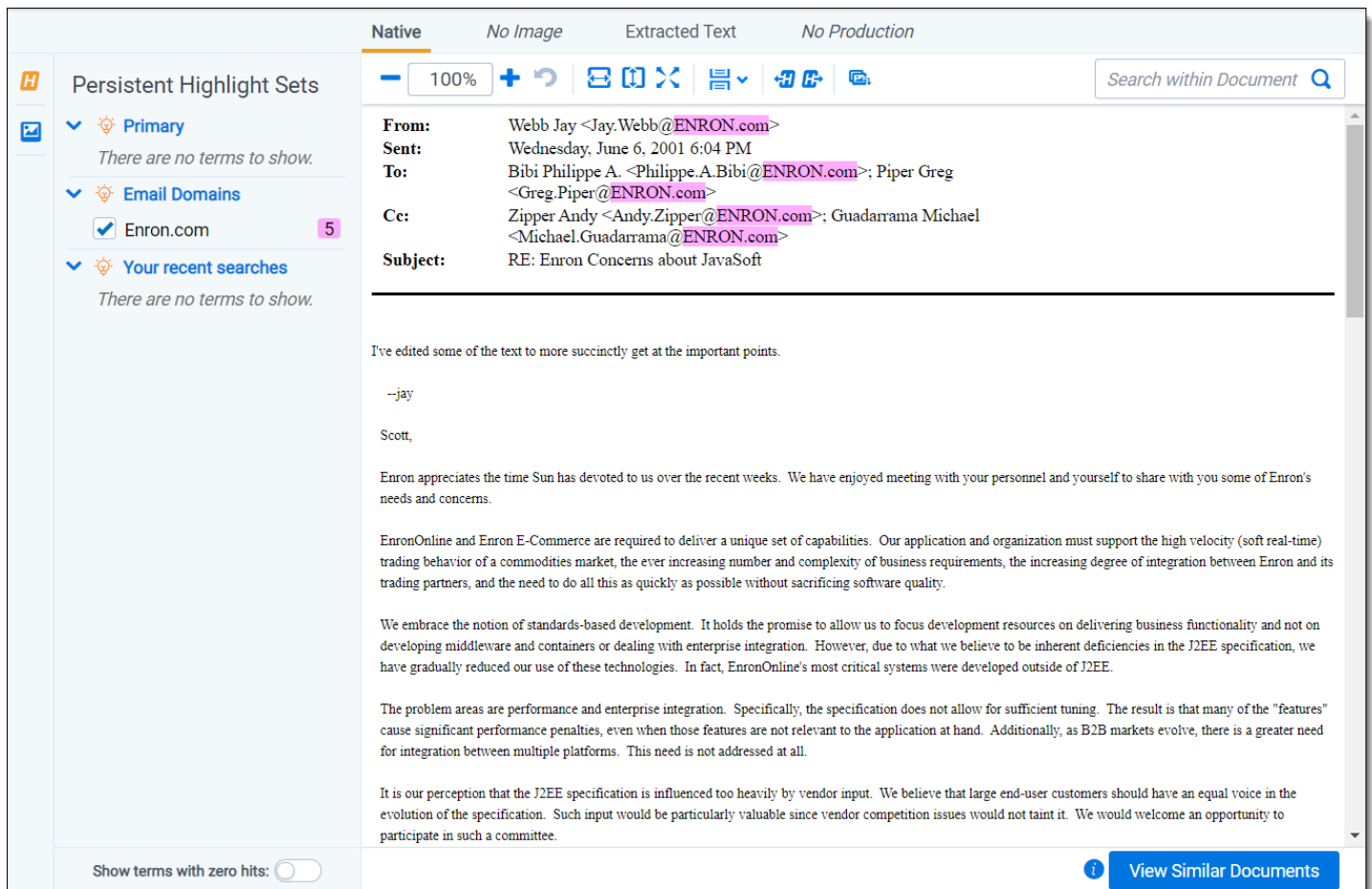
4.4.1 Best practices

Consider the following guidelines when creating or adding terms using Search Terms Reports as the highlight fields source:

- Enter terms exactly as they appear in the document.

- You can use operators such as AND and OR. For example, if you enter these search terms: Apple AND Banana, Relativity would highlight the two terms "apple" and "banana" in the document. See Search terms reports on page 63 for more information.

- Wildcards are useful in some cases. For example, the search term appl* highlights apple, application, applies, and so on. An excessive use of wildcards affects performance. Leading wildcards such as *itting, are not recommended. Using asterisks in the middle of a term don't count as wildcards.

- dtSearch operators can be used to highlight searches when used for a Persistent Highlight Sets in the Native Viewer. You must use a Highlight Fields source (such as a Search Terms Report results field) to use dtSearch syntax. The highlights for these searches use the active and inactive highlighting functionality. Actively navigated highlights are the highlights that the Viewer is focused on and display with full opacity. Inactive highlights display at a lower opacity level.

Note: The increase of dtSearch operators does decrease performance.

- Persistent highlight does understand proximity searching. If you enter the phrase Relativity w/5 software as a search term, the search term report uses a dtSearch to find and tag all documents that meet the criteria. When viewed in the Viewer, the persistent highlighting functions as a dtSearch.

- Persistent highlights does understand the stemming character (~). If you enter the term apply~ as a search term, the search term report finds and tags all documents with the word apply, or any document that stems from apply; including applied, applies, application, and so on. When looking at the document in the Viewer, the persistent highlight functions as a dtSearch. See [Search terms reports on page 63](#) for information on supported syntax.

- Any operator in quotes will be treated as literal by the Viewer search. For example, stemming "~" and wild-card "*" operators. However, dtSearch will treat stemming and wild card operators in quotes not as literal, but as the operator itself. For example, "run~" in the Viewer will find the exact phrase "run~" and "run~" in dtSearch will return hits for run, runner, running, etc.

4.5 Importing search terms for persistent highlighting

To import search terms to use as a source for persistent highlighting perform the following procedures.

4.5.1 Relativity component setup

Before importing search terms, use the following steps to create a Relativity Dynamic Object to handle the data.

1. Navigate to the **Object Type** tab in your workspace.

2. Click **New Object Type**.
   a. Provide a name for the new object in the required **Name** property.
   b. Keep all remaining properties at their default values.
   c. Click **Save**.

3. Navigate to the **Fields** tab.

4. Click **New Field** to create the field that to hold the persistent highlight color information. This field also connects your Dynamic Object to the Document object.

5. In the New Field form, specify the following properties:
   a. **Object Type**- <Dynamic Object created in step 2>
   b. **Name**- Highlight Colors
   c. **Field Type**- Fixed-Length Text
   d. **Length**- 10
   e. Keep all remaining properties at their default values.
   f. Click **Save and New**.

6. Create a new field to link your Dynamic Object and the Document object. Specify the following properties:
   a. **Object Type**- Document
   b. **Name**- <User preference>
   c. **Field Type**- Multiple Object
   d. **Associative Object Type**- <Dynamic Object created in step 2>
   e. Keep all remaining properties at their default values.
   f. Click **Save**.

7. Navigate to the **Persistent Highlight Sets** tab in your workspace.

8. Click **New Persistent Highlight Set**.

9. Create a new set with the following properties:

    a. **Name**- <User preference>

    b. **Order**- <User preference>; this controls the position of this set in the Persistent Highlight Tree in the Viewer.

    c. **Source**- Highlight Fields

    d. **Highlight Fields**- <The name of the field created in step 6b.>

    e. Click **Save**.

4.5.2 Importing terms

To import a CSV or other Relativity-supported load file containing terms, use the following procedure.

1. Open the **Relativity Desktop Client**.

2. Select the workspace you are importing into.

3. Select the Dynamic Object you created above from the object drop-down menu.

4. Select **Tools** from the top menu.

5. Select **Import | <Dynamic Object>** load file.

6. Select your terms load file and corresponding delimiters.

7. Map the field in your load file that contains the terms to the Name field in Relativity.
   Here you can also import Relativity Highlight Color. You must have this information in the load file contained in a field in the following format: highlight color; text color (for example, 15;9). If you do not have this information in the load file, you can manually enter it for terms in Relativity. Because the latter can be time consuming, we recommend having this information in the load file if possible.

Color name	Highlight Color	Number
[Default]		0
Black		1
Dark red		2
Dark green		3
Dark yellow		4
Dark blue		5
Dark magenta		6
Dark cyan		7
Light gray		8
Gray		9
Red		10
Green		11
Yellow		12
Blue		13

Color name	Highlight Color	Number
Magenta		14
Cyan		15
White		16
Light green		17
Light blue		18
Light yellow		19
Light purple		20
Light red		21
Light orange		22
Purple		23
Orange		24
Dark purple		25
Dark orange		26

8. Click **Import** to import the terms.

9. Navigate to the object tab you created in step two of the Relativity component setup section.

10. Click on a term.

11. Select the layout you want to use from the drop-down menu.

12. Click the pencil icon to edit the layout.

13. Click **Add Object list**.

14. Use the drop-down menu to select the field you created in 6b of the Relativity component setup section.

15. Set the **View** field to your preferred document view.

16. Set the **Link View** field to your preferred document view.

17. Click **Save**.

18. Click **Link**.

19. Select all documents.

20. Click **Add**.

21. Click **Set**.

22. Repeat steps 10 through 22 on each term.

23. Verify that the terms are highlight through the following:

    a. Open a document in the workspace.

    b. Open the Persistent Highlight Tree in the Viewer.

    c. Note the presence of the newly created Persistent Highlight Set and verify that terms are highlight in the appropriate colors.

4.6 Creating efficient searches for persistent highlighting

Creating efficient searches improves the performance of persistent highlighting, whether you're working with a Terms Search or Highlight Fields. Use the following guidelines to create efficient searches.

4.6.1 Using terms search

Avoid the following when writing searches for persistent highlighting:

- Do not use "AND" or "OR" connectors. Persistent highlighting looks for the exact phrase, trade and complete, instead of the word, trade, and the word, complete.

- Proximity, fuzziness, and stemming logic cannot be used in a Terms Search. Consider using Highlight Fields to access these search features as described below. The system ignores the dtSearch syntax. Terms receive no highlight if you use these advanced searching features. The search terms report Count column still lists the number of matching terms. For example:

  - The search term, oil w/10 water, searches for the exact phrase oil w/10 water.

  - If you enter the term apply~ as a search term, persistent highlighting technology looks for the term apply followed by any special character.

- Avoid using terms with a large number of hits per document. Persistent highlighting highlights each hit. For example, it takes longer to load a Word document containing 1,000 instances of a single term.

- Avoid using terms that only occur once in a document. Use search terms reports for those terms instead.

- Avoid long lists of numbers, such as Bates numbers or account numbers.

- Do not use duplicate terms.

Use the following techniques to optimize your searches:

- Use the dtSearch Dictionary to identify variations of a term instead of using wildcards.
  - Identify which terms should be in the highlight set and which terms are not necessary.
  - You may want to avoid highlighting terms with high word counts.

Note: To highlight terms using objects, create a fixed-length text field for your object called Highlight Colors. You can enter color-coding in this field using the format: **[highlight color];[text color].**

4.6.2 Using highlight fields

Consider the following guidelines when creating or adding terms using Search Terms Reports as the highlight fields source:

- Enter terms exactly as they appear in the document.
- You can use operators such as AND and OR. For example, if you enter these search terms: Apple AND Banana, Relativity would highlight the two terms "apple" and "banana" in the document. See Search terms reports on page 63 for more information.
- Wildcards are useful in some cases. For example, the search term appl* highlights apple, application, applies, and so on. An excessive use of wildcards affects performance. Leading wildcards such as *itting, are not recommended. Using asterisks in the middle of a term don't count as wildcards.
- dtSearch operators can be used to highlight searches when used for a Persistent Highlight Sets in the Native Viewer. You must use a Highlight Fields source (such as a Search Terms Report results field) to use dtSearch syntax. Relativity dtSearch operators are not supported in the Extracted Text Viewer. The highlights for these searches use the active and inactive highlighting functionality. Actively navigated highlights are the highlights that the Viewer is focused on and display with full opacity. Inactive highlights display at a lower opacity level.

  Note: The increase of dtSearch operators does decrease performance.

- Proximity searching logic can be used with Highlight Fields. If you enter the phrase "Relativity w/5 software" as a search term, the search term report uses a dtSearch to find and tag all documents that meet the criteria. When viewed in the Viewer, the persistent highlighting functions as a dtSearch. See Search terms reports on the next page for information.

- Stemming, including the stemming character (~), can also be used with Highlight Fields. If you enter the term "apply~" as a search term, the search term report finds and tags all documents with the word apply, or any document that stems from apply; including applied, applies, application, and so on. When looking at the document in the Viewer, the persistent highlight functions as a dtSearch. See Search terms reports on the next page for information.

- In Search Terms Reports, you can work around these limitations by using the Dictionary Search function to identify search terms using stemming or fuzziness. Copy the list of terms returned in this search. Paste them in the Add Terms box on the Search Terms Report form. Doing this enhances your search term list, while avoiding errors caused by special characters.

- Use the dtSearch Dictionary to identify variations of a term instead of using wildcards.
  - Identify which terms should be in the highlight set and which terms are not necessary.
  - You may want to avoid highlighting terms with high word counts.

5 Search terms reports

 Search terms reports provide the ability to identify documents containing specific keywords or terms. You can enter multiple terms and generate a report listing the number of hits for each term in a document. You can also select an option to create a multiple object field for the search terms report to use in your persistent highlight sets. When you select a search terms report for use with a persistent highlight set, the report determines which terms or phrases to highlight in the documents through the Review Interface.

5.1 Guidelines for using search terms reports

Use the following guidelines to ensure that your search terms report properly highlights the required terms:

- Define a saved search using conditions that return the required group of documents for the **Searchable Set**. Persistent highlighting applies only to documents in the searchable set. Relativity also only counts hits that fall within the searchable set. Related items not included in the searchable set will not be searched for search terms.

- Confirm that your dtSearch index includes all documents in the **Searchable Set** of the search terms report.

- Select the **Tag Hits** toggle to create a multiple object field for the search terms report. If this field is not created you cannot select it in the **Highlight Fields** option when creating a persistent highlights set. See Persistent highlight sets on page 42.

- When using a search terms report as a highlight source in a persistent highlight set, only the terms in documents associated with the current reports appear highlighted. If you add new search terms to the reports, you must run pending terms so that they appear highlighted in documents.

- The system automatically preserves the precise order in which the terms were entered when generating a report.

5.2 Creating a search terms report

To create a new search terms report, follow these steps:

1. Navigate to the **Search Terms Report** tab.

2. Click **New Search Terms Report**.

3. Complete the fields on the form. See Fields below.

4. Click **Save**.

After saving the search terms report, the Search Terms Report Status section and Search Terms Report console appear. As the status section indicates, you must add terms to your new report. See Adding terms and highlight colors on page 66.

5.2.1 Fields

Search terms reports contain the following fields:

- **Name**—the search terms report's name. This value cannot exceed 75 characters.

- **Index**—the dtSearch index used to create the report.

- **Searchable set**—a saved search that includes the set of documents used to create the report.

- **Include relational group**—includes the "Documents with Hits + [Group Name]" counts for each term in the search terms results. This value counts the documents with hits for each term as well as all documents in the same relational group as the documents with hits. Include relational group only includes hits of related items in the searchable set. Relativity does not look outside of the searchable set. Click **Select** and then choose a relational group to include.

- **Tag Hits**—if enabled, saves the results to a multiple object field named after the search terms report with the prefix STR, like *STR - Industry terms*, so the results can be reviewed later. Tags each document containing search hits using the search terms reports multiple object field with the search terms found in each document.

- **Show in Field Tree**—if enabled, automatically adds the terms to the field tree on the Documents view.

- **Calculate unique hits**—if enabled, includes a unique hits value for each term in the search terms results. Unique hits is the count of documents in the searchable set returned by only that particular term. If more than one term returns a particular document, that document is not counted as a unique hit. Unique hits reflect the total number of documents returned by a particular term and only that particular term.

  Note: Unique hits can help you identify terms in your search terms report that may be overly inclusive.

- **Remove Hidden Characters**—if enabled, automatically filters out hidden or non-displayable text control characters when creating or editing terms for the search terms report.
    - These hidden control characters have been known to cause issues in searching and can be unknowingly copied from Word or Excel documents.
    - The list of control characters that are filtered are the same as the default ignore section of the dtSearch alphabet file text.

- **Email notification recipients**—specifies recipients to send an email notification to when your search terms report finishes running. Enter the email addresses of the recipients. Separate entries with a semicolon.

- **Notes**—enter notes specific to the search terms report.

5.2.1.1 Creating search terms reports through workspace templates

Additionally, you can create search terms reports through workspace templates using the following steps:

1. From your active workspace, ensure that the **Search Terms Report** object type setting for **Copy Instances On Workspace Creation** is **enabled**.

2. **Create a new workspace** using the active workspace as your workspace template.
   The search terms reports are copied over to the new workspace.

5.2.2 Adding terms and highlight colors

To add terms to your search terms report:

Note: You must create a persistent highlight set for highlighted terms to appear in your documents. See Persistent highlight sets for more information.

1. Click the name of your search terms report.

2. Click **Add Terms**.

3. Enter your terms in the text box so that each term appears on a separate line.
   Alternatively, you can also click the **Dictionary** link to display the Dictionary Search pop-up. In the pop-up you can perform searches using fuzziness, proximity, and stemming. Click **Copy to List** to add the Dictionary search results to the New Terms text box.

   Note: Each line is treated as an individual dtSearch query. For more information about dtSearch, refer to the Searching Guide .

4. (Optional) Select a background color and text color using the color picker. See the preview text to verify that the resulting highlighted text is readable.

   Note: By default, highlighted terms appear as black text with an orange background.

5. Click **Add** to add your new terms to the terms list.

   Note: A single term has a character limit of 450.

A confirmation message displays with the count of new terms added. Duplicate terms are ignored. After adding new search terms to an existing report, you must run the terms so that they appear highlighted in documents. For more information, see Running a search terms report on the next page.

5.2.3 Editing terms and highlight colors

To edit a term in your search terms report:

1. Click the name of your search terms report.

2. In the Term column, click on the term you would like to change. The field will become editable.

3. Edit the text, then press **Enter**.

4. **Run Pending Terms** in order to update the search terms report. For more information, see Running a search terms report on the next page.

To edit the background and text color of terms:

1. Click the name of your search terms report.

2. Select the checkbox next to the terms you want to change, then click **Edit**.

3. Choose the new background and text color, then click **Save**.

   Note: Changes to background and text color apply to all terms being edited.

5.2.4 Deleting terms

To remove terms from the search terms report:

1. Click the name of your search terms report.

2. Select the checkbox next to the terms you want to edit, and then click **Edit**.

3. Click **Delete**.

4. Click **Delete**.

If you remove search terms from the reports, the terms automatically disappear from the search terms report results. You must run the report again for accurate totals in the status bar and when using View Term Report.

5.2.5 Copying a search terms report

You can copy an existing search terms report using the mass copy operation.

To copy a search terms report:

1. From the **Search Terms Reports** tab, click the checkbox next to the search terms report you want to copy.

2. From the mass operations bar, select **Checked**. Alternatively, you can select **All** to copy all search terms reports.

3. Select **Copy** in the drop-down menu.

   The Copy window displays.

4. Click **Ok** to copy the items.

5.3 Running a search terms report

You generate a search terms report by using the options available in the search terms report console. The console appears after you save a search terms report or when you open an existing report from the Search Terms Report tab.

The console includes the following options:

- **Run All Terms**—generates counts for each term. Use this option when generating the report for the first time or if you want to regenerate counts for all terms in the report. Run all terms after adding new documents to the searchable set.

- **Run Pending Terms**—updates an existing report. It runs a report on only those terms with a Pending status.

- **View Results**—opens the Search Terms Results page. This page displays the report results, listing the number of document hits for each term.
  The Search Terms Results page provides the following:

  - **Name**—search term included in search terms report.

  - **Documents with hits**—the number of documents in the searchable set that contain the search term.

    Note: Documents with hits is not security-aware or influenced by permissions. This means that it includes documents the user cannot view in a basic search. For example, a user could perform a dtSearch that returns a total of five documents, including two inaccessible documents. Even though the user can only view three documents, the search terms count still includes all five documents originally tagged with the search term.

  - **Documents with hits, including group**—counts the documents with hits for each term as well as all documents in the same relational group as the documents with hits. The count only includes hits of related items in the searchable set. It will not look outside of the searchable set.

- **Unique hits**—counts the number of documents in the searchable set returned by only that particular term. If more than one term returns a particular document, that document is not counted as a unique hit. Unique hits reflect the total number of documents returned by a particular term and only that particular term.

  - **Last run time**—timestamp when the search terms report last ran.

  In this page, you can also access a list of any terms that failed during the creation of the Search Terms Report. To read these error messages, change your view to **Search Terms Results Details**.

- **View Term Report**—In the Search Terms Report console, click **View Term Report** to open the graphical search terms report. You can print or save the report. To save, select a file type at the top of the report.

- **Retry Errors**—attempts to regenerate the report for search terms that returned error messages.

Note: You can now run multiple Search Terms Reports in parallel, simultaneously, by adding more Search Terms Reports agents to the same resource pool as the workspace. You can queue as many reports as needed and they will run when others complete.

5.3.1 Search terms report status

After running a search terms report, the search terms report status section appears. It lists the search terms report name and status. The status indicates the current progress of the report. This field contains either Searching your terms, Completed, or Error.

Report Status: Completed			
Number of Terms	Documents with Hits	Documents with Hits + Relational Groups	Documents in Searchable Set
2	380	0	15937

This section also provides a summary of the search terms report and its results:

- **Number of Terms**—total number of terms run in the search terms report.

- **Documents with Hits**—the number of documents in the searchable set that contain the search term.

- **Documents with Hits + Relational Groups**—counts the documents with hits for each term as well as all documents in the same relational group as the documents with hits.

- **Documents in Searchable Set**—total documents in the designated searchable set.

5.4 Accessing tagged documents using the Field Tree browser

After you run a search terms report with the **Tag** option enabled, Relativity creates a folder in the Field Tree browser with documents grouped by tags found by the search terms report. Each tag includes the count of documents containing that term. The folder is named after the search terms reports multiple object field created by the search terms report. For example, if your search terms report is named Produced Documents, the folder in the Field Tree browser is named STR - Produced Documents.

Click a search term tag in the Field Tree browser to view documents in your searchable set tagged with the selected term. You can also email a link to the tagged documents by right-clicking the tag results and selecting **Email Link**.
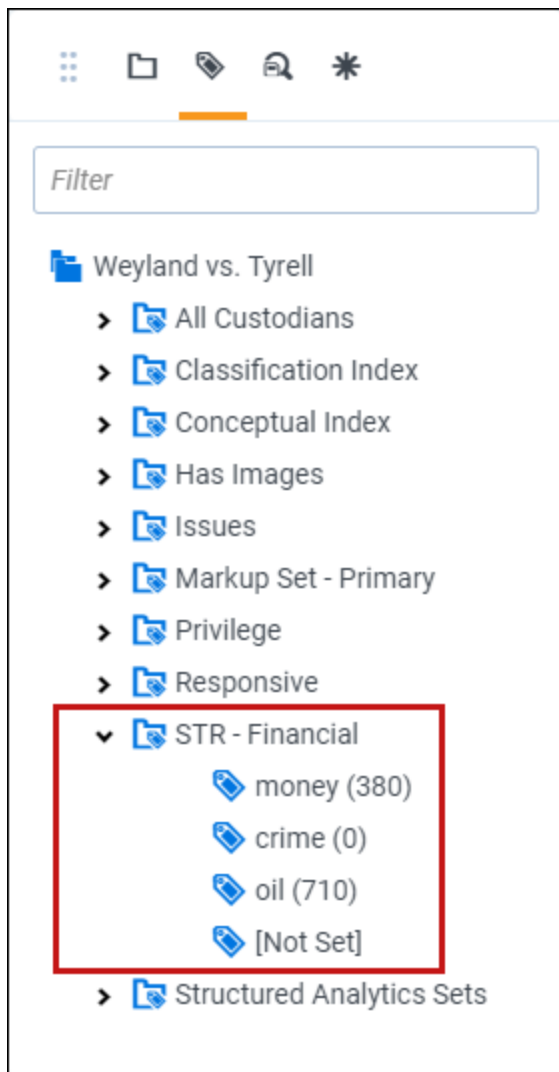
5.5 Using tagged search terms in a saved search

After you run a search terms report with the **Tag** option enabled, Relativity creates choices for each of the terms that you specified. You can then use these choices as criteria in a saved search.

Use this procedure to create a saved search using tagged search terms:

1. Follow the instructions for setting fields in the Information and Search Conditions sections on a saved search.

2. Click on the **Fields** tab in the Saved Search pop-up.

3. Select the desired field in the Unselected section and move it to the Selected section using the arrow icons.

4. Click the **Condition** button and select an option from the pop-op.

5. Perform the following tasks on the **Select STR** dialog:

   a. Select your search terms report in the Field box.

   b. Select an Operator, such *as any of these*.

   c. Select the STR option from the **Condition** drop-down menu to select search terms on the **Select Items**

dialog.

    d. Set any other fields as necessary.

6. Click **OK**.

For example, if you added the tagged search terms called money, crime, and oil, the Conditions section would appear as follows:

Condition: STR - Financial

these conditions ▼

⊕ Condition ▼   ⊕ Logic Group

1. STR - Financial
any of these: money

AND ▼

2. STR - Financial
any of these: crime

AND ▼

3. STR - Financial
any of these: oil

Apply   Cancel

7. Repeat steps 1 to 3 for each tagged search terms.

8. Click **Apply** and **Save & Search** to run your query.

5.6 Permissions

You may have an occasion where you want to grant limited permissions to a group of users outside of the site administrators. For example, you want to limit users from creating new search terms reports to keep your environment organized. However, at the same time, you want users to view, edit, and add to existing terms lists.
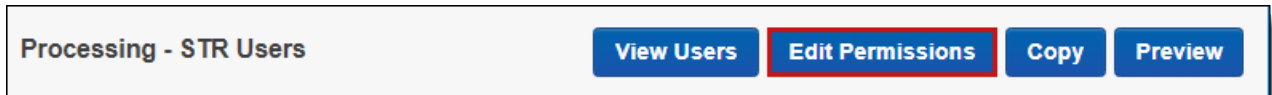
To add search terms report permissions to a user group:

1. Create a new user group and add it to your workspace.

   Note: If you do not know how to create a new user group, see The Admin Guide. If you need help adding the group to your workspace, see The Admin Guide.

2. From the Manage Workspace Permissions modal window, click **Edit Permissions**.
   In the image below, the group name is **Processing - STR Users**.


3. Scroll down to locate the two entries for search terms reports--Search Terms Report and Search Terms Result. You want to edit permissions for existing terms, so you will edit the Search Terms Result object. The Search Terms Report object grants permissions for reports overall and not the content within the report. Click one or more icons to enable the permission level. Available levels include **Disable**, **View**, **Edit**, **Delete**, **Add**, or **Manage Security**.

4. Click **Save**.

5. Click the **Manage Workspace Permissions** link.

6. Click the **Preview** button for your group.
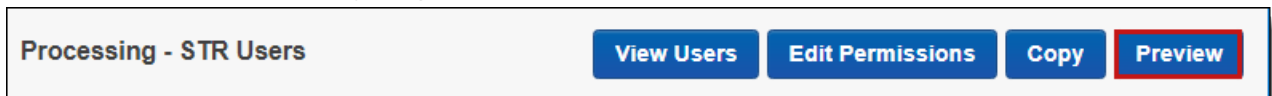
   The workspace opens with the group permissions applied. This view is helpful if you want to see how the workspace looks and functions as a group member. A banner across the top of the page reminds you of the preview mode.
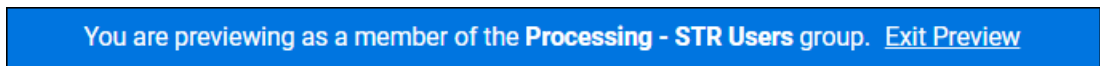
7. Open a search terms report.
   You now see buttons above the search terms list corresponding to the permissions granted. In the image below, add and edit permissions apply.

8. Check the box next to one or more search terms.
   The permission level buttons become active.

9. Click the appropriate button to edit the search term.

Note: If the only permission level granted is Edit, you will not see any buttons above the list. In this case, you can click any search term to enable a text box. Complete your edits and click **Enter** to save and exit.

6 Searching overview

Relativity includes flexible search features designed to facilitate the document review process. These features support a range of searching needs from filtering on fields and simple keyword searches to the development of complex queries. The following list summarizes the searching features available in Relativity.

Filters

You can use filters to limit the documents or items that appear in item lists on Relativity tabs and pop-ups. When you enable the filters for an item list, you can set criteria on single or multiple fields so that only matching documents or items appear in the view. Filters query across the searchable set of documents in the active view to return your results. Relativity supports multiple filter types so that you can choose the best format for different field types. See the Searching Guide for more information.

Keyword searches

You can run keyword searches from the Documents tab and from Dynamic Object tabs. With these searches, you can leverage the basic functionality for querying the SQL full-text index populated with data from extracted text fields. The keyword search engine supports the use of Boolean operators and wildcards. See the Searching Guide for more information.

Saved searches

Saved searches give you the functionality to define and store queries for repeated use. With flexible settings, you can create a saved search based on any Relativity search engine, assign security permissions to it, and define specific columns to display your search results. Saved searches support the development of complex queries that you build using a form with search condition options. These queries run dynamically to ensure that updated results appear when you access a saved search. See the Searching Guide for more information.

dtSearches

Available on the Documents tab, you can use the advanced searching functionality to run queries with proximity, stemming, and fuzziness operators, along with basic features such as Boolean operators and wildcards. System administrators can create a dtSearch index for a specific subset of documents in a workspace, and then assign security to it. They must manually update indexes when you modify the document search sets used to create them. See the Searching Guide for more information.
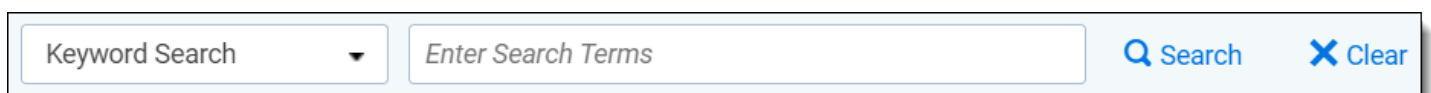
Analytics

Supporting conceptual searching, Analytics includes documents in a result set when they contain similar ideas or conceptual relationships, rather than matching specific search terms or conditions. You can create searches with Analytics that categorize your documents based on the concepts contained in a sample document set. Instead of categorizing documents, you can also perform clustering, which uses specific algorithms, system-defined rules, to identify conceptually related documents. See the Searching Guide for more information.

Regular expressions

Regular Expressions (RegEx) is a form of advanced searching that looks for specific patterns, as opposed to certain terms and phrases. With RegEx you can use pattern matching to search for particular strings of characters rather than constructing multiple, literal search queries. You can use RegEx with a dtSearch index using dtSearch syntax options to construct complex queries. See the Searching Guide for more information.

Additional features

Relativity provides additional features that makes searching easy to use from the Documents tab. Use the **search bar** to run a keyword search query, or click the drop-down list to select another search index you created.
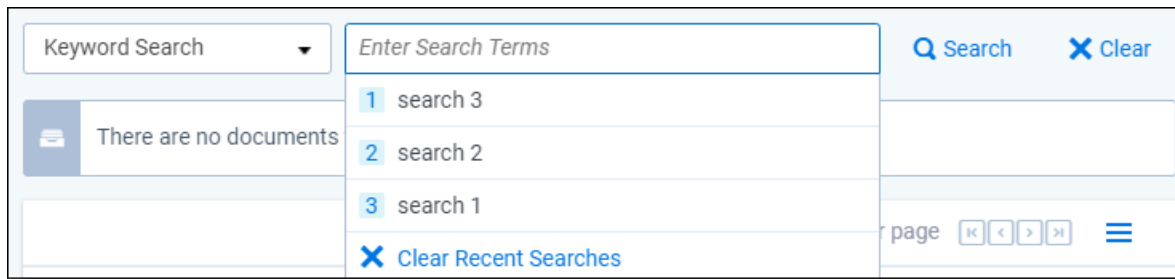
| Keyword Search ▾ | Enter Search Terms | 🔍 Search | ✕ Clear |

With the **search condition** option, you can build queries using the same condition options available for saved searches. You can click **Save as Search** on the Documents tab to create saved searches based on the criteria defined for keyword searches, dtSearches, Analytics, or the search conditions option. See the Searching Guide for more information.

You can also use the search bar to view **recent searches**. Click in the search bar to see up to 10 of the most recent searches from any index in descending order, with the most recently run search first.

Select any search from the list to run that search. To clear the list, click **Clear Recent Searches**.

6.1 Search conditions

You can use the search conditions option to build complex queries by selecting fields, operators, and values. While this feature has the same functionality as the search condition section of the saved search form, it's conveniently available from the Documents tab and Relativity Dynamic Object tabs. This option displays up to five rows, with each row representing a separate criterion. Depending on the type of field you select, different operators appear. You can use this option alone or in conjunction with keyword searches, dtSearches, Analytics, or Cluster visualization. When you use search options in conjunction with another search feature, documents must both meet the search criteria and also the conditions specified.

Note: To use the search conditions option, you must have add or edit permissions for **Search** and access to the **Saved Searches Browser** assigned to you through the Security page. See Workspace security in the Admin Guide.

6.1.1 Setting up search conditions

6.1.1.1 Setting up search conditions in the Search panel
To set up search conditions in the Search panel follow these steps:

1. Navigate to the Search Builder.

2. Click **Add Condition** and select the fields to which you want to apply conditions.

   A pop-up window opens for each condition field you select.

3. Set the required conditions in the relevant field pop-up window by selecting the desired field or by choosing a field category and then selecting the desired field.

4. Click **Apply**.

5. (Optional) Click **Add Logic Group** to add a logic group. Logic groups are evaluated first, and then connected to other filter conditions or logic groups using AND / OR operators.

6. (Optional) Drag and drop conditions together to create logic groups.

7. (Optional) Add the AND or OR operators to connect the criterion.

8. Click **Apply**.

If you need to edit the condition, click on the condition card. The pop-up reopens so you can make changes.

6.1.1.2 Setting up search conditions in the Search browser

To set up search conditions in the Search browser, follow these steps:

1. Click to navigate to the Search Browser.

2. Click **New Search**.

3. Click **Add Condition** and select the fields to which you want to apply conditions.

    A pop-up window opens for each condition field you select.

4. Set the required conditions in the relevant field pop-up window.

5. Click **Apply**.

6. (Optional) Click **Add Logic Group** to add a logic group and drag and drop your conditions into the frames. Logic groups are evaluated first and then connected to other filter conditions or logic groups using AND / OR operators.

7. (Optional) Add the **AND** or **OR** operators to connect the criterion.

8. Enter all required fields.

9. Click **Save** or **Save As**.

If you need to edit the condition, click on the condition card. The pop-up reopens so you can make changes.

6.1.1.3 Using the multiple object condition builder

You can set conditions for **multiple object fields** from a single pop-up window. The following example uses Batch as a multiple object field condition.

To use the multi-object condition builder, follow these steps:

1. Click **Add Condition** from the Search browser or Search panel.

2. Enter or select **Batch**.

    The Condition: Batch window opens.

3. Select the desired operator from the **Operator** drop-down list. For example, **these conditions**.

4. Click **Add Condition**.

5. Select the condition from the **Add Condition** drop-down list. For example, **Batch:: Batch Set**.

6. Click the available fields from the **Available** column and move them to the **Selected** column as desired.

7. Click **Apply**.

8. (Optional) Click **Add Logic Group** to add a logic group. Logic groups are evaluated first and then connected to other filter conditions or logic groups using AND / OR operators.

9. (Optional) Drag and drop conditions into logic groups as desired.

10. Click **Apply** on the Condition: Batch window.

    Relativity applies your search conditions.

For more information about multiple object searching logic, see Multiple object searching.

6.1.2 Canceling queries

You can cancel a long-running search or view by clicking the **Cancel** button. This link appears when you perform a keyword search, dtSearch, Analytics search, or use Pivot. It also appears when you filter or sort a document or Dynamic Object list. It also appears when you perform other actions on item lists containing documents or Dynamic Objects that initiate a query in the background.

When you click **Cancel Request**, Relativity stops the background query used to populate documents in an item list. If you edit a search and click this link, your changes save, but the item list doesn't load. For example, your changes save when you perform a mass edit on a list of documents in a search and then click **Cancel Request** when the query is running to redisplay the updated list.

> **Note:** Relativity creates an audit record in the History tab for canceled queries. The query description displays the running time of the query and indicates that it was canceled. You must have the appropriate permissions to view this tab.

The following table explains different scenarios in which you might cancel a running query and whether the query actually cancels.

Scenario	Result
You start a query and click **Cancel Request** or **Cancel**.	The query is canceled.
You start a query and close the browser.	The query is canceled.
You start a query and an system admin resets the IIS on the server.	The query is not canceled.
You start a query and leave your browser idle for longer than the session timeout specified in Relativity web.config, regardless of whether you clicked **OK** or **Cancel** on the message from the webpage pop-up.	The query is not canceled.
You start a query and click **Cancel** on the message from the webpage pop-up within the session timeout specified in Relativity web.config.	The query is canceled.
You start a query and click **OK** on the message from webpage pop-up within the session timeout specified in Relativity web.config.	The query continues to run. Relativity returns you back to the waiting screen (see the first row of this table).
You start a query and paste a different URL into your browser, or you refresh the page.	The query is canceled.

6.1.3 Frequently asked searching questions

This section includes frequently asked questions from Relativity users.

6.1.3.1 Multiple terms in dtSearch queries

Why would I receive an error message saying my query is too complex?

Relativity can't return precise results when a query includes search conditions that are too complex due to the use of multiple search terms. To avoid this error message, simplify your search criteria. For example, search for 10 instead of 50 terms in your query. You can save and tag your search results from each simpler query. With this approach you can search on the required terms, while providing better results.

6.1.3.2 Proximity searches in dtSearch queries

Why are terms in my proximity search highlighted even when they don't match my defined W/N criteria?

Relativity highlights terms that meet the requirements of your proximity search as well as the individual search terms. This behavior doesn't affect the results of your proximity search, which returns the appropriate documents. For example, the results of a proximity search for instances of law within three words of order (that is "law W/3 order")

includes highlighted terms of "law" and "order" when they aren't within three words of each other. To accommodate this behavior, focus only on the results that match the proximity search criteria, and disregard the other highlighted terms.

6.1.3.3 Using reserved characters in dtSearch queries

Can I use a reserved character such as ampersand (&) in my dtSearch queries?

The following characters have special meaning in dtSearch, and must be treated with care when they appear in your queries: ?, *, %, ~, #, =, :, &, (). Use the dictionary to explore syntax options if necessary.

If you want to make any of these characters searchable, you must add them to the alphabet file and, in some cases, use Regular Expressions in your search. For more information, see the Searching Guide.

6.1.3.4 Multiple conditions

Why do my searches run slowly when I use multiple conditions?

When you add multiple search conditions to a query, Relativity searches on these conditions relative to each other, which slows down the return of your results. For example, you experience slow performance when running a query on all email messages received "after June 1" and "before June 30" of the same year. You can improve performance by using as few conditions as possible, such as excluding the condition "before June 30". Run the query with only the condition "after June 1", and then sort or filter your results to display messages received between the desired dates.

6.1.3.5 Nesting searches

Can I nest multiple searches in a saved search?

For performance reasons, we don't recommend nesting multiple searches in a saved search. You can select a search as a condition, but using multiple searches as conditions slows down the return of your results. See the Searching guide for more information.

7 Summary reports

Summary reports provide aggregate tallies of field values. Field types available for reporting are limited to the following:

- Multiple-choice list

- Single-choice list

- User

- Yes/No

The reports are based on an optional grouping criterion (the vertical axis) and the fields to be tallied (the horizontal axis).

For example, you can create a summary report with the grouping criterion custodian, where the field to be tallied is responsiveness. The report shows the number of documents that have been tagged with each responsiveness value per custodian.

7.1 Creating and editing a summary report

To create a summary report, follow these steps:

1. Click the **Summary Reports** tab.

2. Click **New Summary Report**, or if you're editing an existing summary report, click **Edit**.

3. Complete the fields on the form. See Fields on the next page.

4. Click **Save**.

7.2 Fields

- **Folders** - located in the browser to the left of the form. You can specify the scope of the report using folders. You can report on the entire case workspace or only on specific folders and subfolders.

  > **Note:** We recommend selecting no more than 30 folders and/or subfolders. Selecting more than 30 folders can result in an error when trying to save the summary report.

- **Name** - the title of the summary report.

- **Group By** - an optional field where you can select a grouping criterion for the report. Grouping criteria appear as rows on the report.
    - Leave the group by field blank to display only a summary with no grouping.

    - Click [...] to select your grouping condition.

      > **Note:** You can use filters to quickly find your field.

- **Report on subfolders** - a yes/no field that reports on a single folder or a folder and its subfolders. Defaults to Yes, which reports on folders and their subfolders.

- **Columns** - select which fields are tallied. Selected fields display as columns on the report.
    - **Add Columns** - add columns to the report. Click **Add Columns**and select the checkbox for each field you want to tally. You can use filters to quickly find the desired fields. Only multi-choice list, single-choice

list, user, and yes/no fields can be reported on.

- **Remove selected columns** - remove fields from your columns section.

8 Tabs

A workspace contains tabs that provide you with easy access to different Relativity features, including documents, search terms reports, views, and other default functionality. Relativity is a highly customizable platform. Commonly used tabs can be added to the Sidebar so that they can conveniently be accessed at any time.

You can also apply any workspace template with a tabs arrangement that best serves your review needs. Some workspace templates also include custom tabs for specialized functionality.

You can add custom tabs in workspaces or at Home. Users with admin rights also have access to a Tabs tab from Home. The functionality of this Tabs tab is the same as the Tabs tab in a workspace.

In addition, Relativity automatically creates a tab when you add a new object type. If you are developing a custom application, you may want to obtain the globally unique identifier (GUID) for a tab. For information about obtaining GUIDs, see Basic concepts for the application framework on the Relativity 2023 Developers site.For information about obtaining GUIDs, see Basic concepts for the application framework on the Relativity 2023 Developers site.

8.1 Creating and editing tabs

> **Note:** We do not recommend entering sensitive data in a tab name because it cannot be secured with client domains.

To create or edit a tab, follow these steps:

1. Click the **Tabs** tab.

2. Click **New Tab**. If you're editing an existing tab, click the ✎ icon in the row of the tab you would like to edit.

3. Complete the fields on the form. See Fields below.

4. Click **Save**.

8.2 Fields

Information on the fields in the Tab Information and Tab location are described below.

8.2.1 Tab Information

- **Name** - the tab's name. This field must be between 1 and 50 characters. Be as concise as possible when naming tabs.

- **Tab Type** - determines the type of tab you want to create:

  - **Object** - creates a tab for a non-document object in your workspace.

  - **Parent** - establishes the tab as a parent tab. Existing tabs can then be set as children of the parent tab, which causes them to display in the Sidebar's fly-out menu or in the Tab strip when the parent tab is currently selected. Selecting this option changes the layout by hiding the Object Type and Set as Default fields.

  - **External** - link to any URL or object type in Relativity.

    > **Note:** Selecting **External** from the **Link Type** menu causes the **Link** field to appear below the **Parent** field. In the **Link** field, you can enter a web address to link to a URL.
    > Allowed external domains can be whitelisted via the DomainNameWhiteListUrls instance setting.

    You can create a link from a tab to an Relativity Dynamic Object (RDO) or a script, using either an Artifact ID or GUID. To create links to other objects, you must use their GUIDs. For information about working with objects that don't have GUIDs, see Assigning a GUID to an object on page 84.

    Use the following token to link to an object: **ObjectArtifactIdentifier=[identifier]**, where [identifier] is the GUID of the object, or in the case of RDOs and scripts, the GUID or Artifact ID. For example, you would use the format **ObjectArtifactIdentifier=736b1c1f-d22f-43cf-9094-cc8acf94c60** to create a link from a tab to the object with this GUID.

    You can use the following case insensitive text replacement options to customize the URL. This lets you display current details about your workspace.

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

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

- **Object Type** - determines which object's information is displayed in the tab for those specified as **Link Type = Object.**

- **Set as Default Tab** - toggle on to make this tab serve as the workspace's default tab. Reviewers logging in to the workspace are taken to the default tab. If a reviewer does not have access to the default tab, he or she is directed to the Documents tab instead.

- **Visible** - toggle on to display this tab from the Sidebar, Tab strip, and/or Quick nav.

- **Relativity Applications** - add this tab to a Relativity application. Clicking Select brings up a list of available applications.

8.2.2 Tab Location

- **Show in Sidebar** - toggle on to add this tab to the Sidebar. Depending on the number of tabs that have already been added to the Sidebar, the Order value assigned to this tab, and your browser's resolution, the tab may be displayed in the More menu if it does not fit into the current Sidebar.

- **Parent** - select a parent tab to assign the current tab as a child tab. The current tab will display in the fly-out menu for the parent tab.

- **Order** - represents the position of the tab by a numerical value. It can be any positive or negative integer. You cannot use decimals in this field. The lowest-numbered tab displays at the top of the Sidebar. The highest-numbered tab displays at the bottom of the Sidebar or in the More menu. Items that share the same value are sorted in alphanumeric order.

  Note: It's always a good idea to set tab order by 10's, starting with 10, then 20, then 30, etc. By numbering in groups of 10 you can insert an item into any position later in the workspace, without the need to reorder (for example, you can use 10, 20, 25, 30, 40 to insert a new tab between 20 and 30).

- **View Order** - displays a list of active tabs and their current order when you click the View Order button.

8.3 Nesting children tabs

You may prefer to nest several tabs within a parent to reduce clutter in your Relativity interface and make tabs easier to locate. You must first specify a tab as a parent (step 1) and then specify children tabs (steps 2-4).

1. Create a new tab with a **Tab Type** of **Parent** or edit an existing tab.

2. Click the ✎ icon next to the tab you want to nest.

3. Choose the parent tab name under the **Parent** drop-down menu.

4. Click **Save**.

Repeat for each child tab you wish to nest. Hover your cursor over the parent tab to display the nested child tabs in a fly-out menu.

8.4 Assigning a GUID to an object

You need to assign a GUID to a Relativity object that only has an Artifact ID, before you can link a tab to it. To assign a GUID to an object, you run a SQL script on database for the workspace where the object resides. This script adds this identifier to the record for the object on the Artifact.Guid table in the database.

You need to complete this assignment process for all Relativity objects except for the following cases:

- **RDOs and scripts** - you can link these objects to tabs using their Artifact IDs or GUIDs, if available. See Creating and editing tabs on page 81.

- **Objects in applications** - Relativity automatically assigns GUIDs to objects added to applications. For information about obtaining their GUIDs, see Viewing component GUIDs on the Relativity 2023 Developers site.

Use the following procedure to assign a GUID to an object:

1. Obtain the Artifact ID for an object from the URL used to access it, or by adding the Artifact ID field to the list view for the object in Relativity.
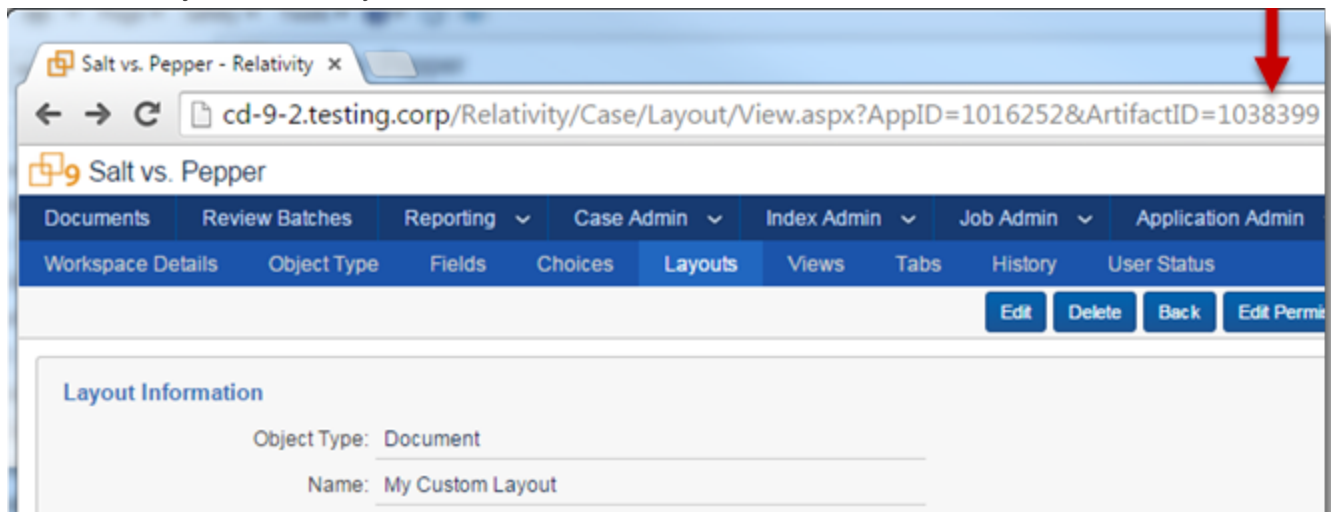
2. Log in to your database server. You must be a database admin.

3. Locate the workspace database for the object that requires a GUID.

4. Execute the following SQL script on the workspace database for the object:

```
DECLARE @artifactID int = 0 -- Your artifact that is missing a GUID.
IF NOT EXISTS (SELECT 1 FROM EDDSDBO.[ArtifactGuid] WHERE ArtifactID =
@artifactID)
BEGIN
    INSERT INTO EDDSDBO.[ArtifactGuid] VALUES (@artifactID, NEWID())
END
SELECT [ArtifactGuid] FROM EDDSDBO.[ArtifactGuid] WHERE ArtifactID = @artifactID
```

5. Assign the GUID added to the database to the ObjectArtifactIdentifier token to link a tab to the object. See Creating and editing tabs on page 81.

9 Viewer

Relativity's Review Interface displays workspace documents. You can use the Viewer type tabs to toggle the loaded formats of documents, such as Native Viewer, Image Viewer, Extracted Text Viewer, or Productions Viewer. Using the Viewer, you can control the form of document that displays in the interface. If a document has not been imaged, you can image documents on-the-fly in the Viewer.

> **Note:** Using your internet browser to zoom to any size other than 100% while using the Viewer is not supported and can cause unexpected behavior.

If you do not see the document in the Viewer, it either has not been loaded to the workspace, its conversion failed, or you do not have permission to see it.

Note: In the Native Viewer, you can expand the email header to display full email addresses. If you collapse or expand an email header, the Viewer maintains the expanded or collapsed state as you navigate through documents in the set.
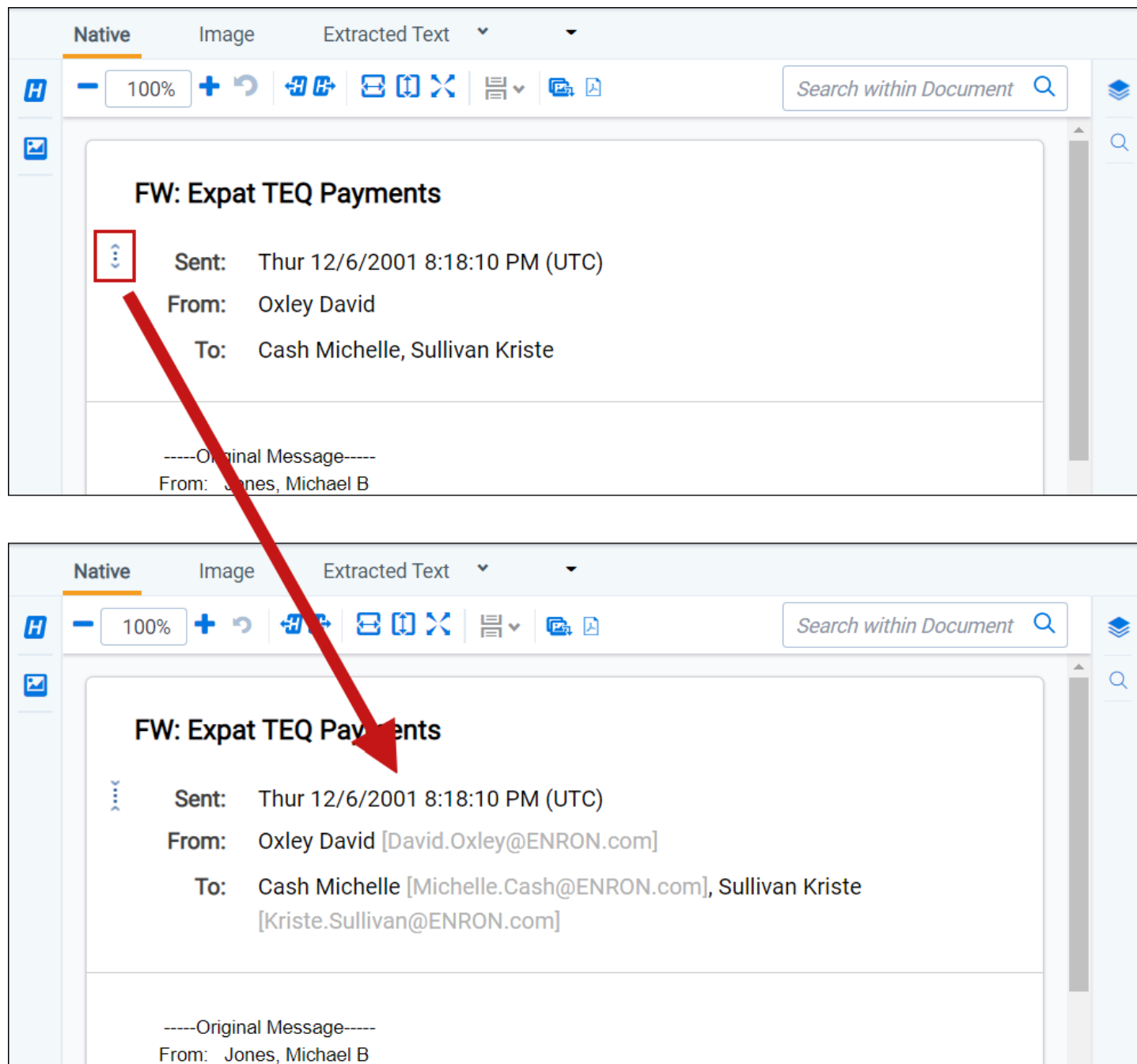
9.1 Native Viewer

The Native Viewer displays an HTML rendering of the document that is as close to the original version of the document as possible. It also provides options for navigating through a single document and between documents in a document set. You can also conduct text searching, highlighting text to copy and paste, zooming, arranging, and saving pages you review in the Native Viewer. You also have the option to print single documents from the Native Viewer by saving the document as a PDF. For more information, see Create PDF.

Note: The Viewer displays PDF text by mapping the character codes to Unicode in most cases. To check whether PDF text has been properly encoded and will display correctly in the Viewer, copy the text in the original PDF file and paste it into another application like Microsoft Word or Notepad. If the pasted text does not display correctly, the PDF is not properly encoded. If the pasted text displays correctly in another application but not in the Viewer, contact Support for assistance.

9.1.1 Navigating the Native Viewer

The Native Viewer offers several ways of viewing and working with documents. There are options available in the following sections of the Viewer:
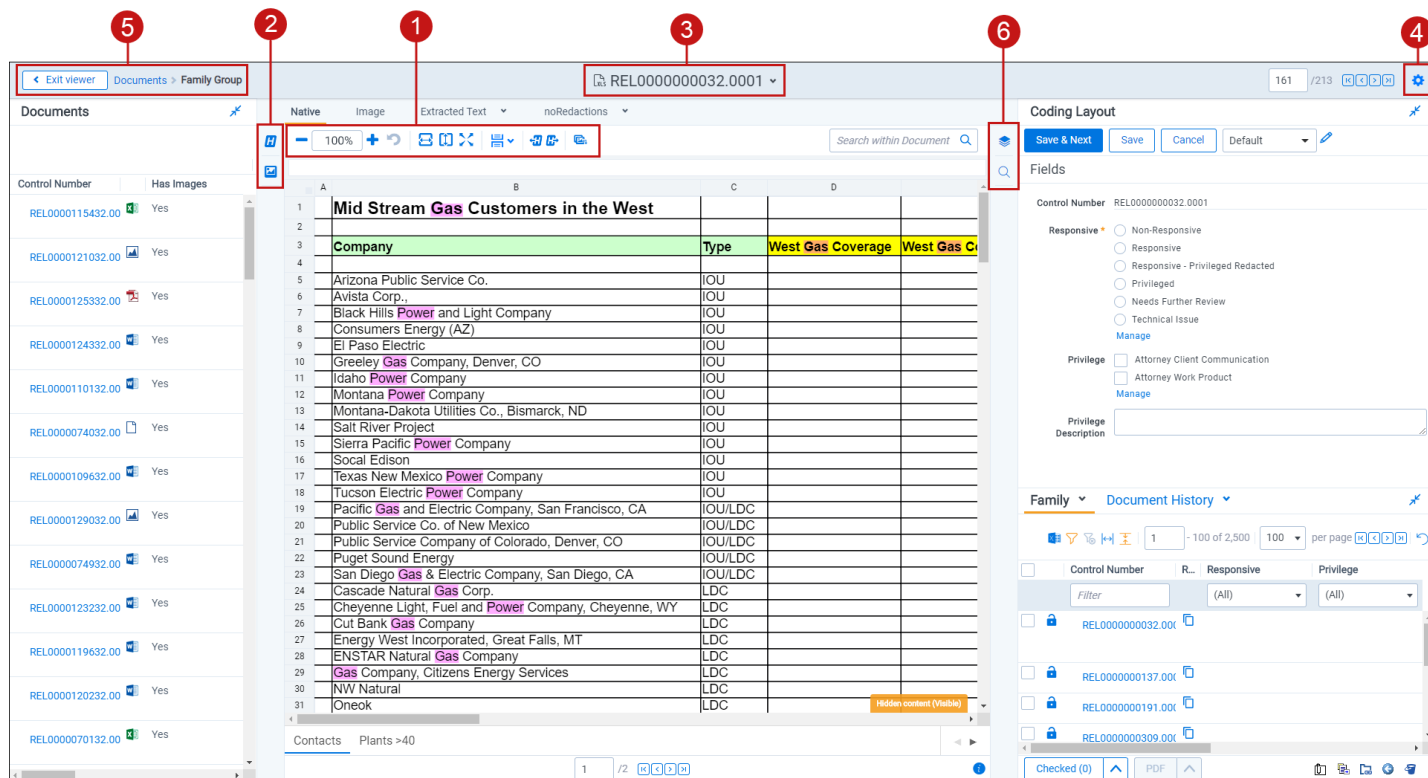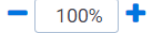
1. Native Viewer toolbar options

2. Left drawer Viewer options

3. Document actions menu

4. Viewer settings menu

5. Viewer breadcrumbs

6. Right drawer Viewer options

Each of these options and menus is described in more detail in the sections below.

9.1.1.1 Native Viewer toolbar options

The following toolbar options are available in the Native Viewer:

- **Zoom out/in** ▬ 100% ✚ —zooms out and in on the current document in increments of 10% within a range of 10% to 4,000%. Your zoom setting persists as you navigate through a document set. This To specify a zoom percentage without using the zoom out/in toolbar buttons, type the number in the percentage field and press the **Enter** key.

- **Reset zoom** ↺—resets the zoom to 100%.

- **Fit width** ⬌—increases the size of the document to fit the maximum width of the Viewer. This setting persists when you re-size the window.

- **Fit page** ⬍—fits the entire document into the total size of the page. Clicking this zooms out the document and reduces the font size.

- **Fit actual** ⤢ - fits the document display to the actual size it was in its native application. By default, this resets the zoom percentage to 100%.

- **Layout mode** ▤⌄ —select one of the following options to determine how documents that are more than one page long display in the Viewer.

    - **Single** ▤—one page of a document will display at a time. Use the page navigation options at the bottom of the Viewer to adjust which page you view.

    - **Single continuous** ▤—displays the pages in the document stacked vertically so you can scroll up and down to view them.

    - **Facing continuous** ▦—displays the pages in the document in a row horizontally so you can scroll left and right to view them.

- **Go to next/rrevious highlight** ⬅➡ —moves through previous and next highlighted terms in the document.

- **Rotate all pages** ⟳—rotates all pages in a document clockwise 90 degrees. This option is only available for documents that have been paginated.

- **Create PDF** 🗎 —click to save the current native document as a PDF file. When you click this option, the Create PDF pop-up displays. The document then opens in a new window in your browser as a PDF where you can then choose to save or print the document image. This option is only available if the PDF application is installed in your workspace.

9.1.1.2 Searchable PDF improvements per configuration

When you Create PDF from the Native Viewer or using the Mass PDF operations bar, most types of searchable PDFs will now have significantly smaller file sizes. More specifically, images without highlights, but configured to be searchable and stamped, will benefit from the most dramatic decrease in file size. But, the Create PDF feature now generates reduced file saves for a wide range of configurations when creating searchable PDFs. To accomplish this for previously unknown file-types and mixed TIFF and JPEG Create PDF jobs, Relativity now treats each page individually, instead of treating the entire document as a whole, allowing for the best file-size-reduction technique possible for each page.

Image Format	Redactions	Highlights	File Size Reduction
TIFF	Yes	No	Up to 76%
TIFF	Yes	Yes	Up to 43%
JPEG	Yes	No	Up to 43%
JPEG	Yes	Yes	Up to 43%

After you click **Create PDF**, a copy of the document converts to a PDF file you can save from your web browser downloads. Relativity assigns a GUID for Create PDF file names.
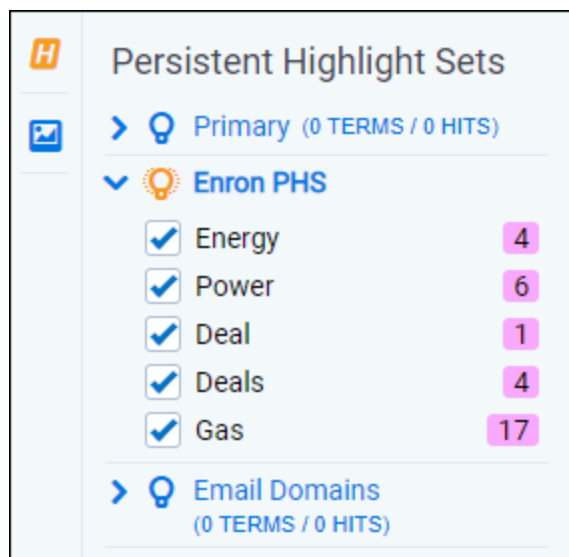
- **Search bar** *Search within Document*—searches for terms in the current document and navigates through the hits.

    - Entering a term and either clicking the left or right arrow button or pressing **Enter** in this text box scrolls to and highlights the text of the next instance of the term from the placement of the cursor.

    - Searching in this text box is not case sensitive.

    - The Search Bar supports dtSearch and some proximity, fuzziness, and stemming.

    - You can remove a term you previously searched for, or all of the terms you have recently searched for, from the Persistent Highlight pane. Removing a term or terms will also remove any highlights they generated in the document. To remove a term or terms, hover your cursor over the row of the term you wish to remove or hover your cursor over your recent searches and then click on ⊗ on the right side of the row.

- **Show/Hide Hidden Cells** —displays or hides all hidden cells in a Microsoft Excel spreadsheet. This functionality is only available for Excel files and does not work on imaged documents because Relativity only images unhidden cells.

9.1.1.3 Left drawer Viewer options

The following options are available in the left drawer:

- **Persistent Highlighting** —displays or hides a panel containing all recent searches from the criteria entered in the search bar and any persistent highlight sets in the workspace. You can also create a dtSearch or keyword search in the Your recent searches section. Only terms in the sets and recent searches that are in the current document will display in the pane.
  Additionally, you can control which highlights display in the current document by clicking on either the persistent set to only display highlights from that set or you can click on a specific term to only see that term highlighted in the document. You can also navigate to and from highlights using this pane.

- **Thumbnail** —click to expand the left drawer and display the Thumbnail Viewer. Each page of the document you're reviewing has its own numbered thumbnail in the Thumbnail Viewer. To learn more, visit Thumbnail Viewer.

9.1.1.4 Right drawer Viewer options
The following options are available in the right drawer:

- **Show/Hide hidden cells** —displays or hides all hidden cells in a Microsoft Excel spreadsheet. This functionality is only available for Excel files and does not work on imaged documents because Relativity only images unhidden cells.

- **Show/Hide Contextual Search pane** —click to expand the right drawer and display the Contextual Search pane. This feature allows you to quickly navigate to matching search terms in a document. The Contextual search pane has the same functionality as the search bar. To learn more about the search bar's functionality, see Search Bar.
  Additionally, each search term match is displayed in a box that includes both words before and after the search term match to view the context of each one.
  Enter a term or terms in the search box and press **Enter** on your keyboard to highlight in yellow any matches in the current document. You can click on a desired search term box in the pane to jump to that place in the document. The active search term box will display with a blue border and the matching search term in the

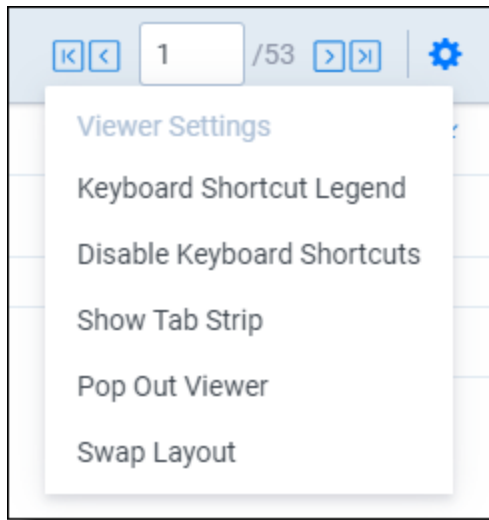document will be highlighted in blue to make it easy to find.
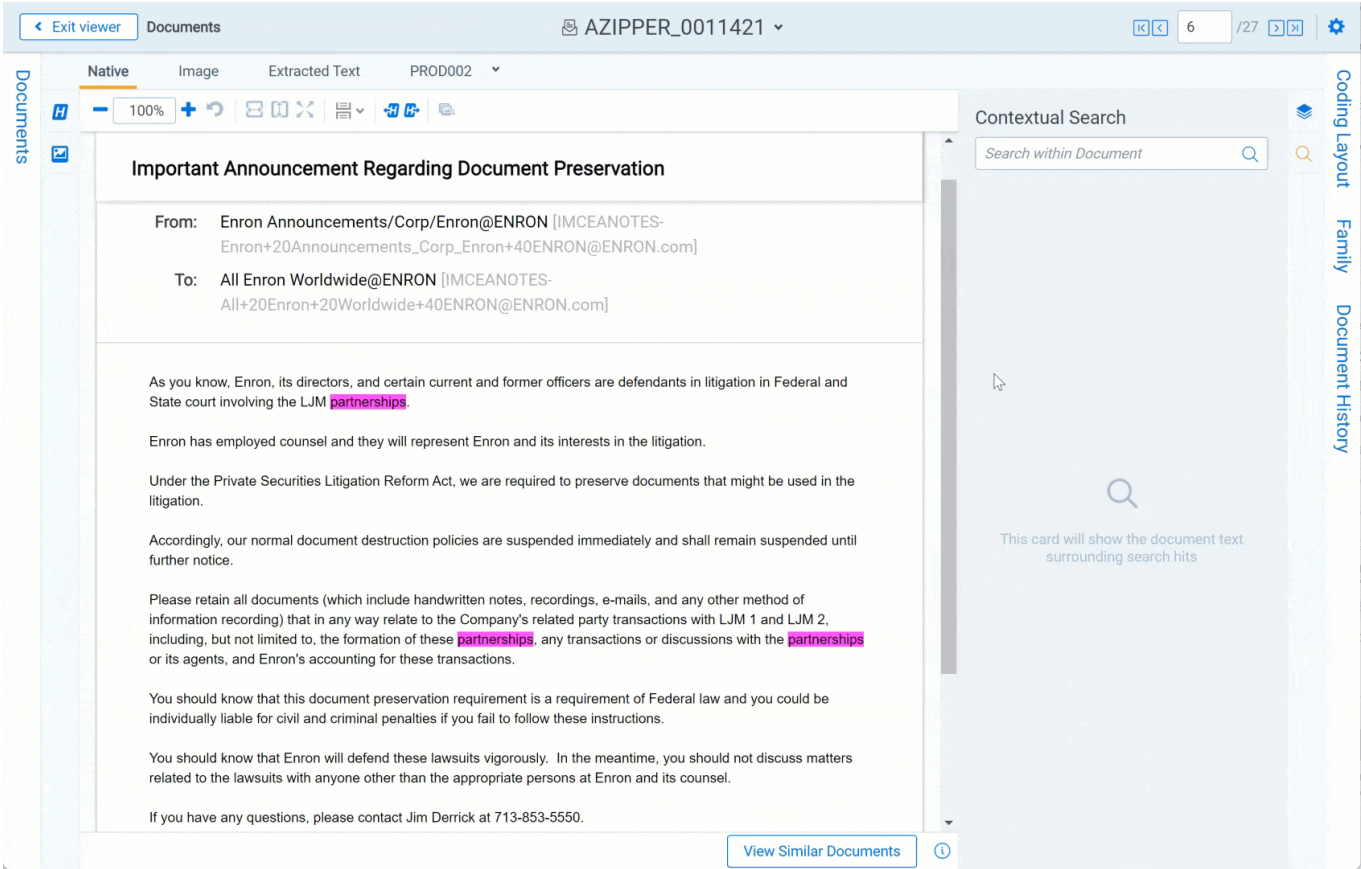
9.1.1.5 Document actions menu
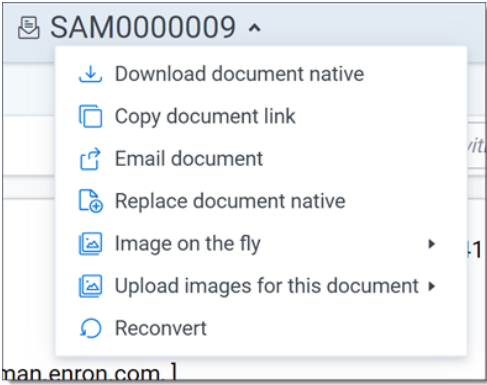
To learn more about these options, see Document actions menu.

9.1.1.6 Viewer settings menu

To learn more about these options, see Viewer settings menu.

9.1.1.7 Viewer breadcrumbs

The Viewer breadcrumbs help you track your current location while browsing documents in the Related items card. The information on your current location updates as you navigate. If Documents is an active link, you can click it to return to the document you were viewing before browsing documents in the Related items card.
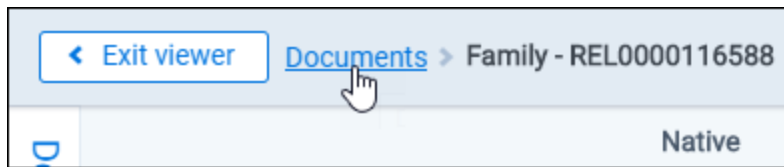
Additionally, to exit the Viewer and return to the page you were previously on, you can click the **Exit viewer** button at any time.

9.1.2 Copying text

While viewing a document in the Native Viewer, you have several right-click options, including the **Copy** option. Use this option to copy text from the document you are currently viewing and then paste it into another application.

To do this:

1. Highlight the text you want copied.

2. Right-click., and then select ✛ Copy from the menu.

You cannot copy text if you do not have permission to the Local Access option on the Document object. This is the same permission that permits you to open the file in its native application. For more information, see Object list in Relativity Admin guide.

-   Have not highlighted any text.

-   Do not have permission to the Local Access option on the Document object. This is the same permission that permits you to open the file in its native application. For more information, see Object list in Relativity Admin guide.

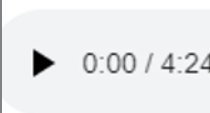## 9.1.3 Streaming audio and video files

Audio and video files can be streamed in the Native Viewer. Audio and video file type compatibility varies depending on your internet browser.
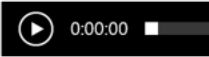
Note: If an audio or video file has not been opened in the Native Viewer, it may display with a value of **No** for the Supported by Viewer field. Once a file has been successfully opened by the Viewer, the Supported By Viewer field displays **Yes**.
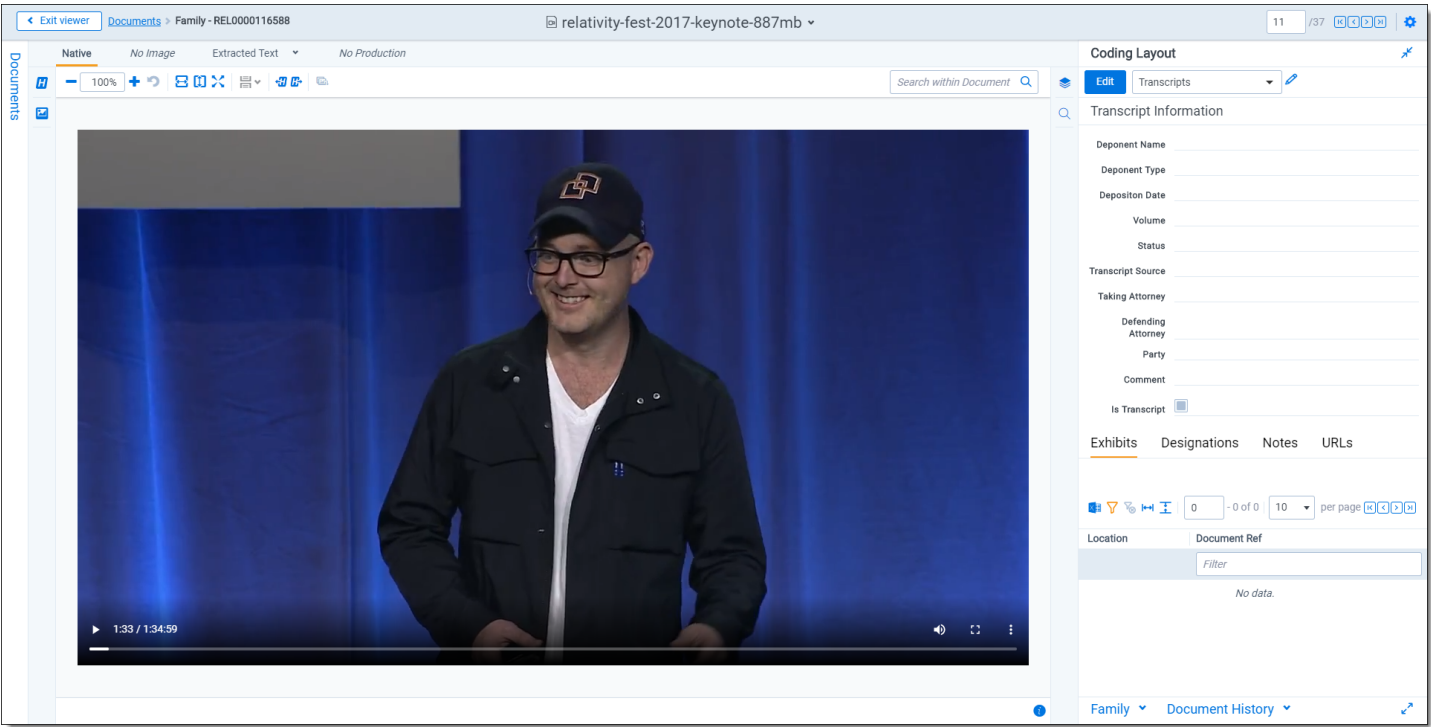
Note: To adjust how large of files can be streamed in the Viewer, edit the **MaximumNativeSizeForViewerForMediaFilesinMegaBytes** instance setting.

The audio and video controls that display in the Viewer depend on your internet browser.

Browser	Audio Controls	Video Controls
	▶ 0:00 / 4:24	0:00 / 0:30

Browser	Audio Controls	Video Controls

9.1.4 Document intelligence

Document intelligence notifies you that there is hidden or annotated content present in the current document in the Native Viewer. This hidden content are the annotations and modifications tracked in certain document formats. For more information on the file types, see Tracking annotations. When hidden content is found in a document, a pop-up modal appears in the lower right corner. Highlighting and bordering is also visible in the Viewer where the changes were made and a annotation bar is available to sort and view each annotation. Once the notifications appear, you can then choose whether or not to view tracked changes, hidden text and comments in the Viewer.
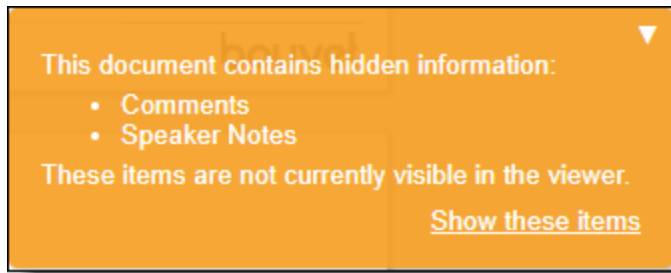
9.1.4.1 Tracking annotations

The various file types each have distinct annotations that are tracked. Below is each file type that is supported and the related tracked changes:

File type	File exten-sions	Annotation type	Tracked changes
Excel	.xls, .xlsx, .xlsb	Tracked changes, formulas, hidden pages/-columns/rows, Comments	Inserted cell, moved cell, modified cell, cleared cell Inserted column, deleted column Inserted row, deleted row Inserted sheet, renamed sheet
Word	.doc, .docx	Tracked changes, comments, hidden text	Insertions, deletions, moves
PowerPoint	.ppt, .pptx	Speaker notes, comments, hidden slides	
PDF	.pdf	Comments, text content outside the printable page	

9.1.4.2 Using notifications and the annotation bar

When using document intelligence, an orange pop-up modal appears in the bottom right corner of the Viewer when hidden content exists. Click on the pop-up modal to see the hidden content on that document. If there is no hidden content found, the modal will say so. If there is hidden content found, it lists each piece of content. Click **Show these items** to open the annotation bar.

A hidden content icon is available when a supported file type is in the Native Viewer. Click to open or close the annotations bar. If you are viewing an unsupported file type, the icon is not available. For supported file types, see the Tracking annotations.

Annotation bar

The annotation bar is for sorting and viewing the hidden content found with document intelligence. Each annotation has a card that lists the tracked change, a description of the change, time and date, and author of the change.

If there are multiple annotation cards in the annotation bar, then you can sort them in multiple ways. Click the **Sort By** drop down menu for these options:

- Location
- Author A-Z
- Author Z-A
- Oldest first
- Newest first
- Annotation type

Annotation types and highlights

Each type of annotation comes with its distinct highlight in the Native Viewer. Below is a table that lists each annotation type with its highlight in the Viewer:

File type	Modification	Annotation
Excel	Inserted cell	Green dotted border around cell.
Excel	Deleted cell	Red dotted border around cell.
Excel	Modified cell	Purple dotted border around cell.
Excel	Moved cell	Red dotted border around original location. Green dotted border around new location.
Excel	Inserted row	Green shading in the row header.
Excel	Deleted row	Red shading with *DEL* in the row header. If the row is added then deleted, the shading is purple.
Excel	Inserted column	Green shading in column header.

File type	Modification	Annotation
Excel	Deleted column	Red shading with *DEL* in the column header. If the row is added then deleted, the shading is purple.
Excel	Inserted sheet	Green shading in the sheet tab.
Excel	Hidden sheet	Grey text in the sheet tab.
Excel	Modified sheet	Purple shading on the sheet tab.
Word	Comments	Blue background on text and note bubble in document.
Word	Insertions	Green shading behind text.
Word	Deletions	Red shading behind text.
Word	Moves	Purple shading behind text.
Word	Hidden text	Red shading behind text.
PowerPoint	Speaker notes	Page under sheet. Each of these pages count toward the document's total number of pages. If you try to navigate to a speaker note, the Viewer will take you to the page above the speaker note, so you can see what the note applies to.
PowerPoint	Comments	Note bubble in presentation.
PowerPoint	Hidden slide	Hidden icon in bottom left corner of slide.
PDF	Comments	Note bubble in document.

Leader lines

Clicking on an annotation in the Viewer connects the selected annotation to the related annotation tile in the annotation bar. Click on another annotation to view the leader line to that annotation card.

One grey connector line is available at a time, unless you moved a cell. In this case, there is a leader line where the cell was originally located and a leader line in the cell's new location. Click the same annotation to remove the leader line.
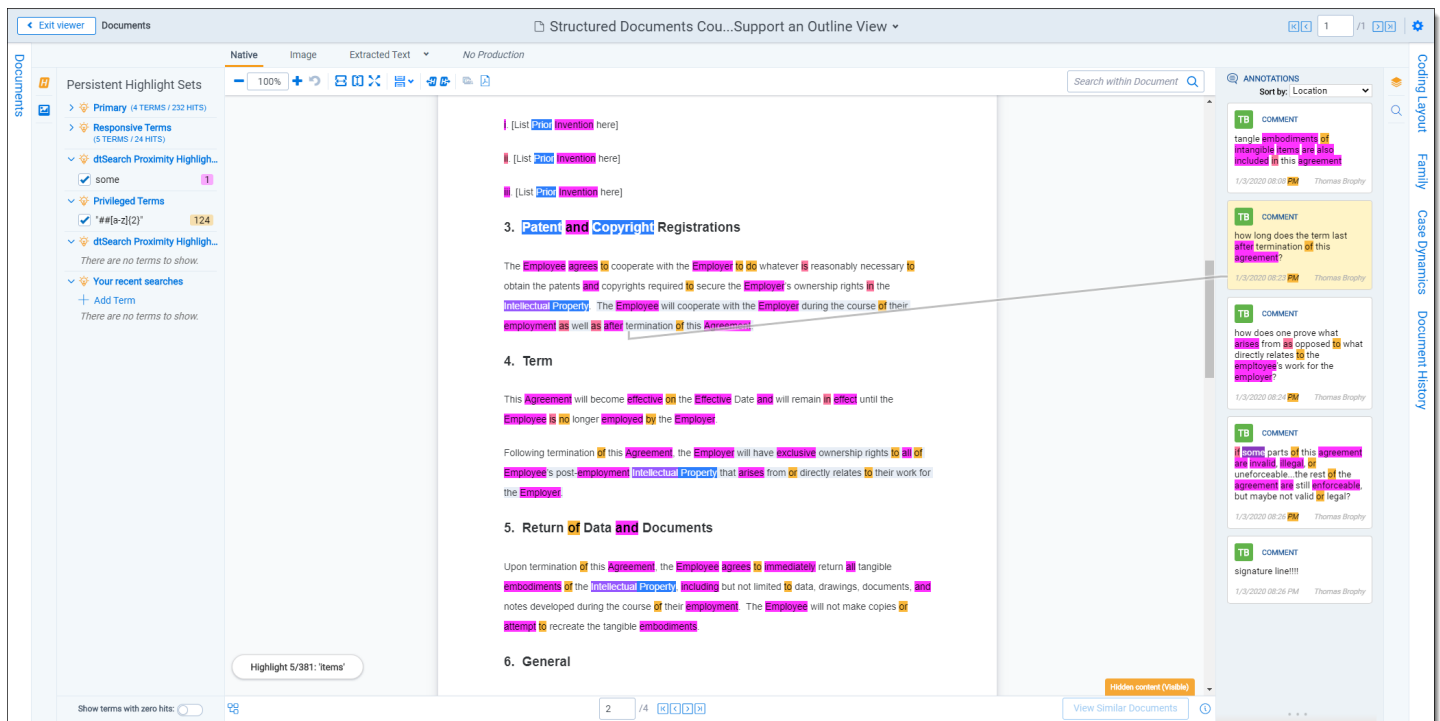
Note: The *Has Hidden Data* field is populated during processing. The hidden content that the Viewer finds may not be perfectly in-sync with the hidden data that the processing engine finds.

9.1.5 Document Conversion

Beginning in 10.2.270.1, the Image Viewer and Productions Viewer support conversation streaming. This allows users to begin reviewing large documents without having to wait for the entire document to load.

The instance setting, MinimumSupportedVersionOfOutsideIn, determines the OutsideIn version to use when converting a document. The earliest OutsideIn version Relativity will support is 2017.1. Any document converted using a prior OutsideIn version will automatically re-convert with at least the minimum supported version input as the value in this instance setting. As a result, users will no longer have to mass-convert to benefit from the latest OutsideIn version.

Documents automatically re-convert in the following priority:

- Priority One—documents currently being viewed.

- Priority Two—the next three documents in the review set.

- Priority Three—related documents, checked-out batch documents, the first 10 documents in a list.

All other documents not subject to the requirements listed above must be manually re-converted.

9.2 Image Viewer

When you switch to the Image Viewer, a .tiff or .jpeg version of the document displays. You can highlight and redact images in this mode.

The Image Viewer is only available if you have loaded an imaged version of the document in the Viewer or if you have manually imaged the file using the Image on the fly option in the Document actions menu. For more information, see Imaging on the fly.

The redactions that are burned into a produced image are the redactions that were on the image at the time that you produced it. If you add or remove redactions from an image after you have produced it, then the image and the produced version of that image will be out of sync.

9.2.1 Navigating the Image Viewer

The Image Viewer offers several ways of viewing and working with documents.

Note: If you used the Basic Imaging profile to produce images of a .pdf file, please note that the Viewer displays .pdf text by mapping the character codes to Unicode in most cases.
To check whether .pdf text has been properly encoded and will display correctly in the Viewer, copy the text in the original .pdf file and paste it into another application like Microsoft Word or Notepad. If the pasted text does not display correctly, the .pdf file is not properly encoded. If the pasted text displays correctly in another application but not in the Viewer, contact Support for assistance.

There are options available in the following sections of the Viewer:

1. Image Viewer toolbar options
2. Left drawer Viewer options
3. Document actions menu

4. Viewer settings menu

5. Viewer breadcrumbs

Each of these options and menus is described in more detail in the sections below.

9.2.1.1 Image Viewer toolbar options
The Image Viewer displays the following icons in the toolbar:

- **Zoom out/in** —zooms out and in on the current document in increments of 10% within a range of 10% to 4,000%. Your zoom setting persists as you navigate through a document set.
  To specify a zoom percentage without using the zoom out/in toolbar buttons, type the number in the percentage field and press the **Enter** key.

- **Reset zoom** —resets the zoom to 100%.

- **Fit width** —increases the size of the document to fit the maximum width of the Viewer. This setting persists when you re-size the window.

- **Fit page** —fits the entire document into the total size of the page. Clicking this zooms out the document and reduces the font size.

- **Fit actual** —fits the document display to the actual size it was in its native application. By default, this resets the zoom percentage to 100%.

- **Layout mode** —select one of the following options to determine how documents that are more than one page long display in the Viewer.

    - **Single** —one page of a document will display at a time. Use the page navigation options at the bottom of the Viewer to adjust which page you view.

    - **Single continuous** —displays the pages in the document stacked vertically so you can scroll up and down to view them.

    - **Facing continuous** —displays the pages in the document in a row horizontally so you can scroll left and right to view them.

- **Rotate all pages** —rotates all pages in a document clockwise 90 degrees.

- **Rotate current page** —rotates only the current page clockwise 90 degrees.

  Note: Image rotation is persistent. Any pages that you rotate will be rotated the next time you return to them in the Viewer and for other users who view them after you rotate them. Rotation is also applied when you run the production containing the images.
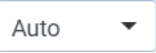
- **Selector** —select within a document.

- **Markup visibility** 👁 —changes the visibility mode of the markups between full visibility, transparent and hid-den. By default, this is set to Solid, which means all highlights and redactions appear as solid as you applied them.

- **Highlight - <Color>** 🟦 ⌄ —highlights the selected text with the color you specify from the drop-down menu. The default color is blue. Select from the following: blue, green, orange, pink, purple, and yellow.

- **Redaction mode - Basic redact** 🗎 —enables the basic redaction tool. For more information, see Creating inverse redactions on page 33.

- **Redaction mode - Full page** 🟦 —enables the full-page redaction tool. The drop-down menu for this redac-tion type offers the same options as the basic Redact icon, except that the redaction you choose is applied to the entire page. For example, if you select White, the entire page becomes white. For more information, see Creating full-page redactions on page 34.

- **Redaction mode - Inverse** 🟦 —enables the inverse redaction tool. For more information, see Creating inverse redactions on page 33.

- **Redaction mode - Mass redact** 🗎 —apply a full-page redaction across all images or a range of images in the document. For more information, see Creating mass redactions on page 34.

- **Redaction Type - <Style>** 🟦⌄ —enables single redaction tool. For more information on redacting, see Creat-ing basic redactions on page 33. Select from the following types of redactions:

  - **Black** ▪—applies a solid black box to the selected text.

  - **Cross** ⊠—applies a white box with an X in the middle of it over the selected text.

  - **Text** ⊤—applies a box over the selected text, in which you can add text such as *Privileged* or *Redacted*.

  - **White** ▫—applies a solid white box over the selected text.

- **Font Size** [Auto ▼] —change the font size of the text within a text box redaction.

- **Delete Highlights** 🗑—mass delete markups from any or all images in the document. For more information, see Mass deleting markups on page 39.

- **Create PDF** 📄—gives you the option of saving the image as a PDF. For more information, see Saving an image as a PDF. This option is only available if the PDF application is installed in your workspace.

9.2.1.2 Left drawer Image Viewer options

The following options are available in the left drawer:
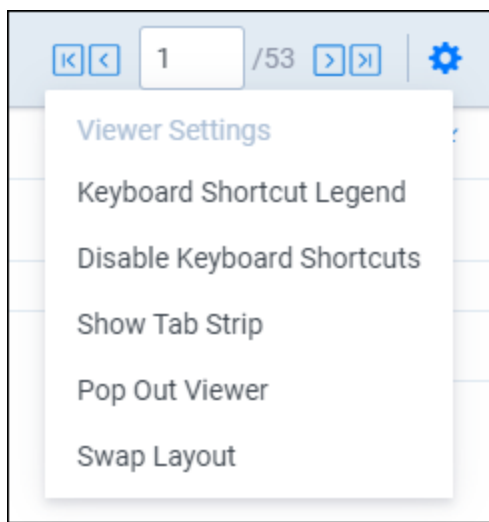
- **Thumbnail** 🖼—click to expand the left drawer and display the Thumbnail Viewer. Each page of the document you're reviewing has its own numbered thumbnail in the Thumbnail Viewer. To learn more, visit Thumbnail Viewer.

9.2.1.3 Document actions menu
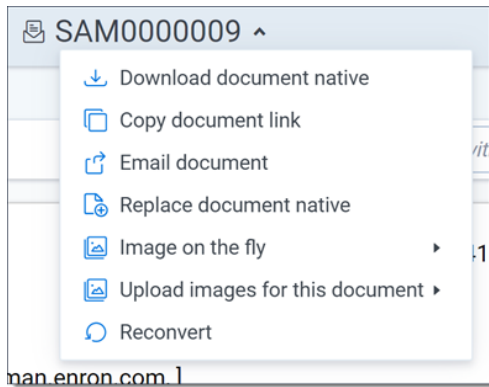
To learn more about these options, see Document actions menu.

9.2.1.4 Viewer settings menu

To learn more about these options, see Viewer settings menu.

9.2.1.5 Viewer breadcrumbs
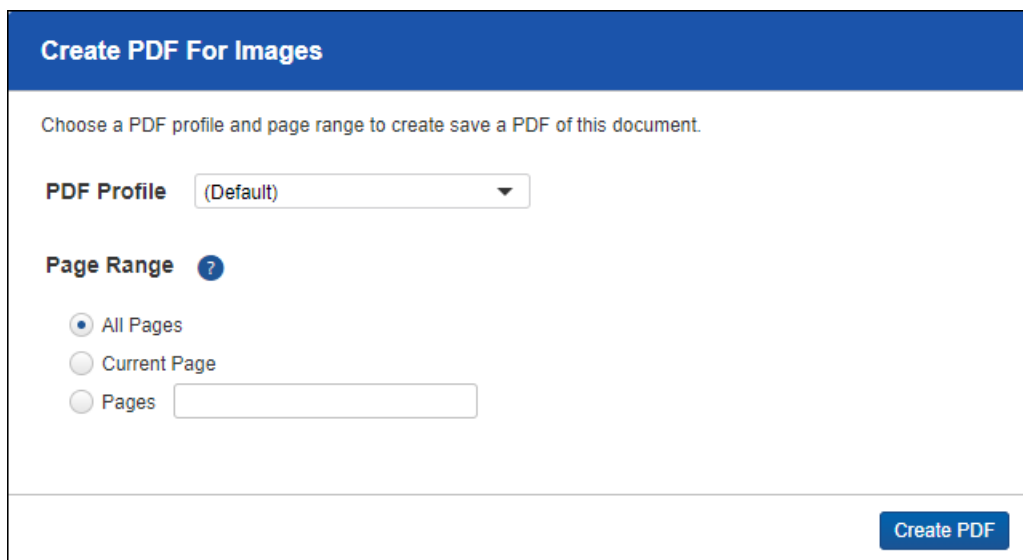
The Viewer breadcrumbs help you track your current location while browsing documents in the Related items card. The information on your current location updates as you navigate. If Documents is an active link, you can click it to return to the document you were viewing before browsing documents in the Related items card.
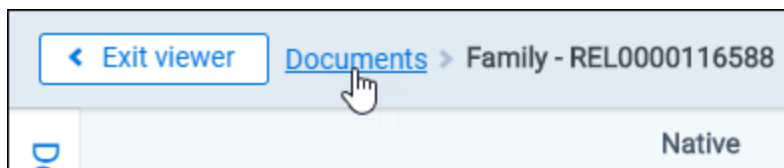
Additionally, to exit the Viewer and return to the page you were previously on, you can click the **Exit viewer** button at any time.

9.2.2 Saving an image as a PDF

Clicking the PDF icon brings up the following window, in which you can specify your PDF settings:

Create PDF For Images

Choose a PDF profile and page range to create save a PDF of this document.

PDF Profile   (Default) ▼

Page Range ❓

- ● All Pages
- ○ Current Page
- ○ Pages [   ]

Create PDF

- **PDF Profile**—select the desired PDF profile to determine how the PDF will be customized.

- **Page Range**—select from the following standard print range options:

  - **All pages**—saves all pages in the document.

  - **Current Page**—saves only the page you are currently on.

  - **Pages**—saves a range of pages that you specify in the text box to the right.

9.3 Extracted Text Viewer

When you switch to Extracted Text Viewer in the Viewer type tabs, you can access a drop-down menu on the right side of the Extracted Text tab where all extracted text and all long text fields on the field edit/creation page are available. Creating fields in the Admin guide. The drop-down menu lists long-text fields that contain text for the current document open in the Viewer and those you have permissions to.

Note: Relativity displays all long text fields made available in the Viewer in the drop-down menu, regardless of whether that field contains text for the current document. If you select a long text field from the drop-down list, and the current document does not have text for that field, the Viewer displays a message stating, "This page is empty".

Note: The Viewer displays .pdf text by mapping the character codes to Unicode in most cases. To check whether .pdf text has been properly encoded and will display correctly in the Viewer, copy the text in the original .pdf file and paste it into another application like Microsoft Word or Notepad. If the pasted text does not display correctly, the .pdf file is not properly encoded. If the pasted text displays correctly in another application but not in the Viewer, contact Support for assistance.

9.3.1 Navigating the Extracted Text Viewer

The Extracted Viewer offers several ways of viewing and working with documents. There are options available in the following sections of the Viewer:
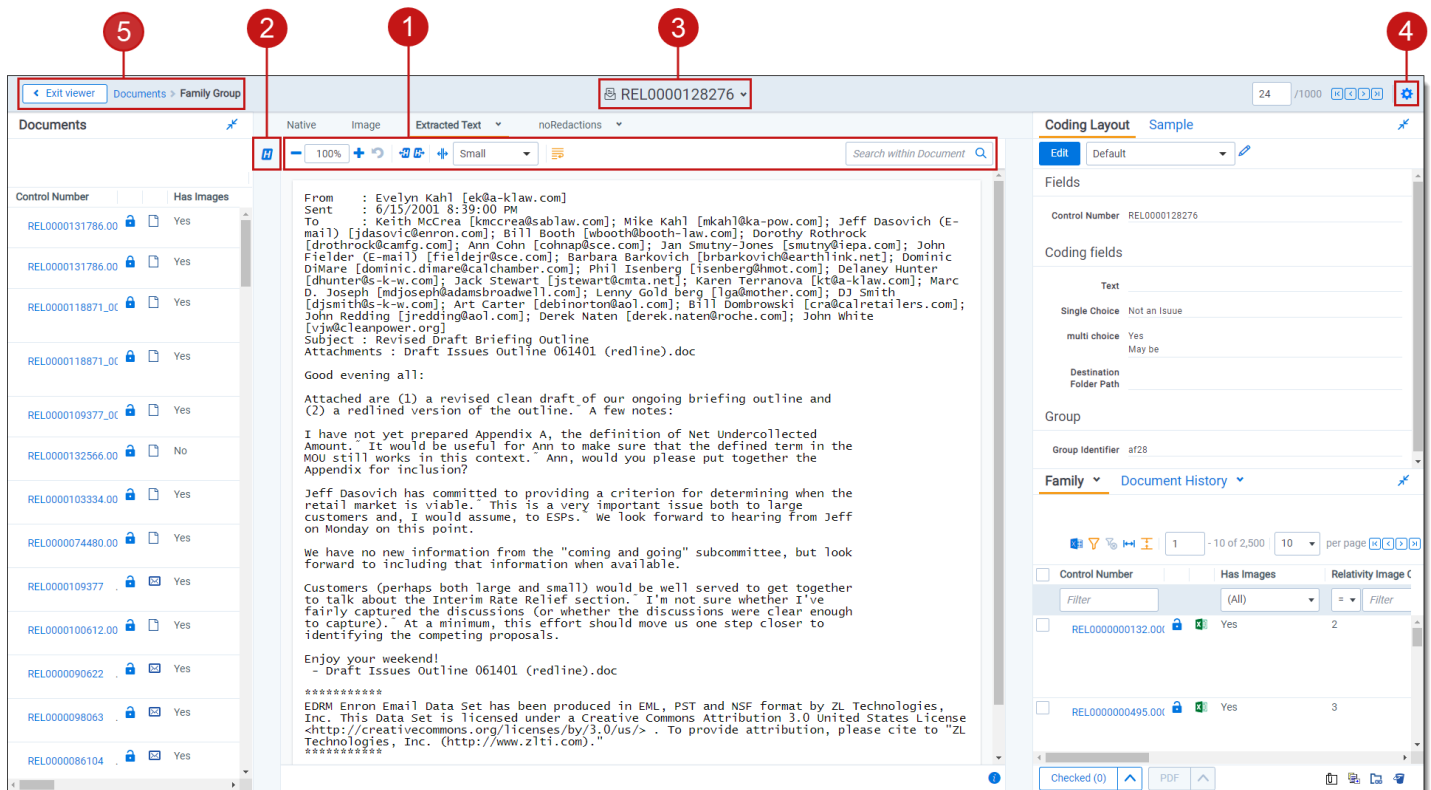
1. [Extracted Text Viewer toolbar options](#)

2. [Left drawer Viewer options](#)

3. [Document actions menu](#)

4. [Viewer settings menu](#)

5. [Viewer breadcrumbs](#)

Each of these options and menus is described in more detail in the sections below.

9.3.1.1 Extracted Text Viewer toolbar options

The Extracted Text Viewer provides the following options:

- **Zoom out/in** —zooms out and in on the current document in increments of 10% within a range of 10% to 4,000%. Your zoom setting persists as you navigate through a document set.
  To specify a zoom percentage without using the zoom out/in toolbar buttons, type the number in the percentage field and press the **Enter** key.

- **Reset zoom** —resets the zoom to 100%.

- **Go to next/previous highlight** —moves through previous and next highlighted terms in the document.

- **Tab character size** ⟷ Small ▾ —select an option from the drop-down menu to determine the amount of space that is taken when the Tab key was used in the current document. This option can help you ensure that the spacing in a spreadsheet document is aligned and works best when the Tab key is used after each column in the spreadsheet.

- **Toggle wordWrap** —determines whether the text in the current document will wrap so that it fits on the current page or not.

  - **Enabled**—text in the current document will be forced onto the next line if it cannot display in the current window size. You cannot scroll horizontally with Toggle WordWrap enabled.

  - **Disabled**—text in the current document will not be forced onto the next line will display in more horizontal fashion. You can scroll horizontally to control to view the desired text.

- **Search bar** Search within Document 🔍 —searches for terms in the current document and navigates through the hits.

  - Entering a term and either clicking the left or right arrow button or pressing **Enter** in this text box scrolls to and highlights the text of the next instance of the term from the placement of the cursor.

  - Searching in this text box is not case sensitive.

  - The search bar supports dtSearch and so proximity, fuzziness, and stemming can be used.

Note: If you do not have permission to the Local Access option on the document object, you cannot use the *Ctrl+C* or *Ctrl+Ins* options in either the Native Viewer or the Extracted Text Viewer.
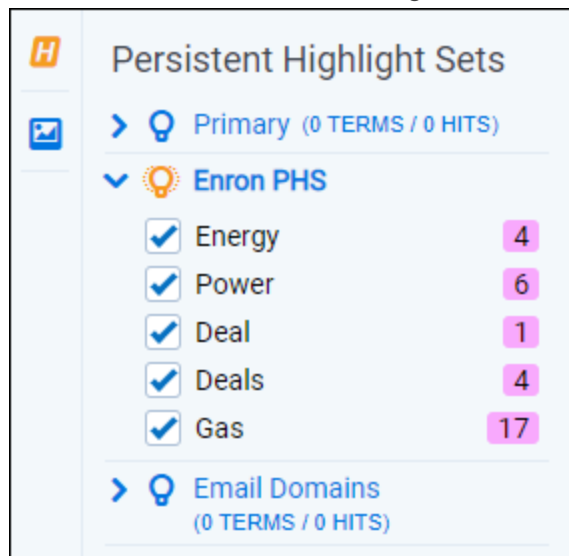
9.3.1.2 Left drawer Viewer options
The following options are available in the left drawer:

- **Persistent Highlighting** 🄷 —displays or hides a panel containing all recent searches from the criteria entered in the search bar and any persistent highlight sets in the workspace. You can also create a dtSearch or keyword search in the Your recent searches section. Only terms in the sets and recent searches that are in the current document will display in the pane.
Additionally, you can control which highlights display in the current document by clicking on either the persistent set to only display highlights from that set or you can click on a specific term to only see that term highlighted in

the document. You can also navigate to and from highlights using this pane.

9.3.1.3 Document actions menu
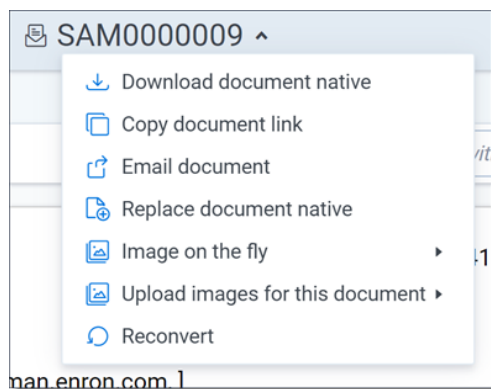
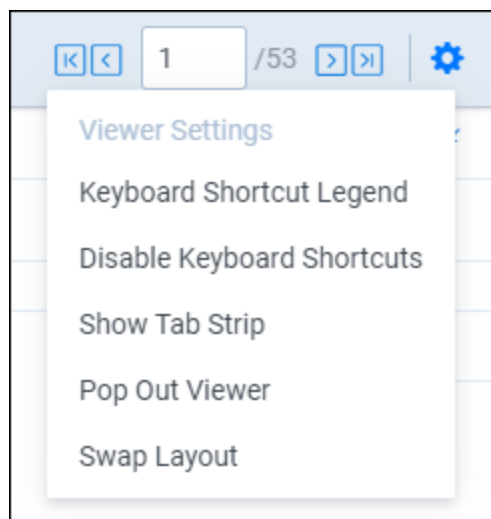To learn more about these options, see Document actions menu.

9.3.1.4 Viewer settings menu

To learn more about these options, see Viewer settings menu.

9.3.1.5 Viewer breadcrumbs

The Viewer breadcrumbs help you track your current location while browsing documents in the Related items card. The information on your current location updates as you navigate. If Documents is an active link, you can click it to return to the document you were viewing before browsing documents in the Related items card.
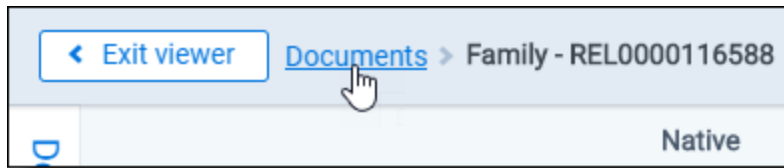
Additionally, to exit the Viewer and return to the page you were previously on, you can click the **Exit viewer** button at any time.

9.4 Productions Viewer

When you switch to the Productions Viewer in the Viewer type tabs, you can access a drop-down menu on the right side of the Productions Viewer tab that displays available production sets that contain the current document. For information about creating production sets, see Production sets in the Admin guide.

> **Note:** The redactions that are burned into a produced image are the redactions that were on the image at the time that you produced it. If you add or remove redactions from an image after you have produced it, then the image and the produced version of that image will be out of sync.

Select a production set from the drop-down menu to see how a document was produced in the selected production. If a document is not included in a production, the productions mode option is unavailable.

9.4.1 Navigating the Productions Viewer

The Productions Viewer offers several ways of viewing and working with documents. There are options available in the following sections of the Viewer:
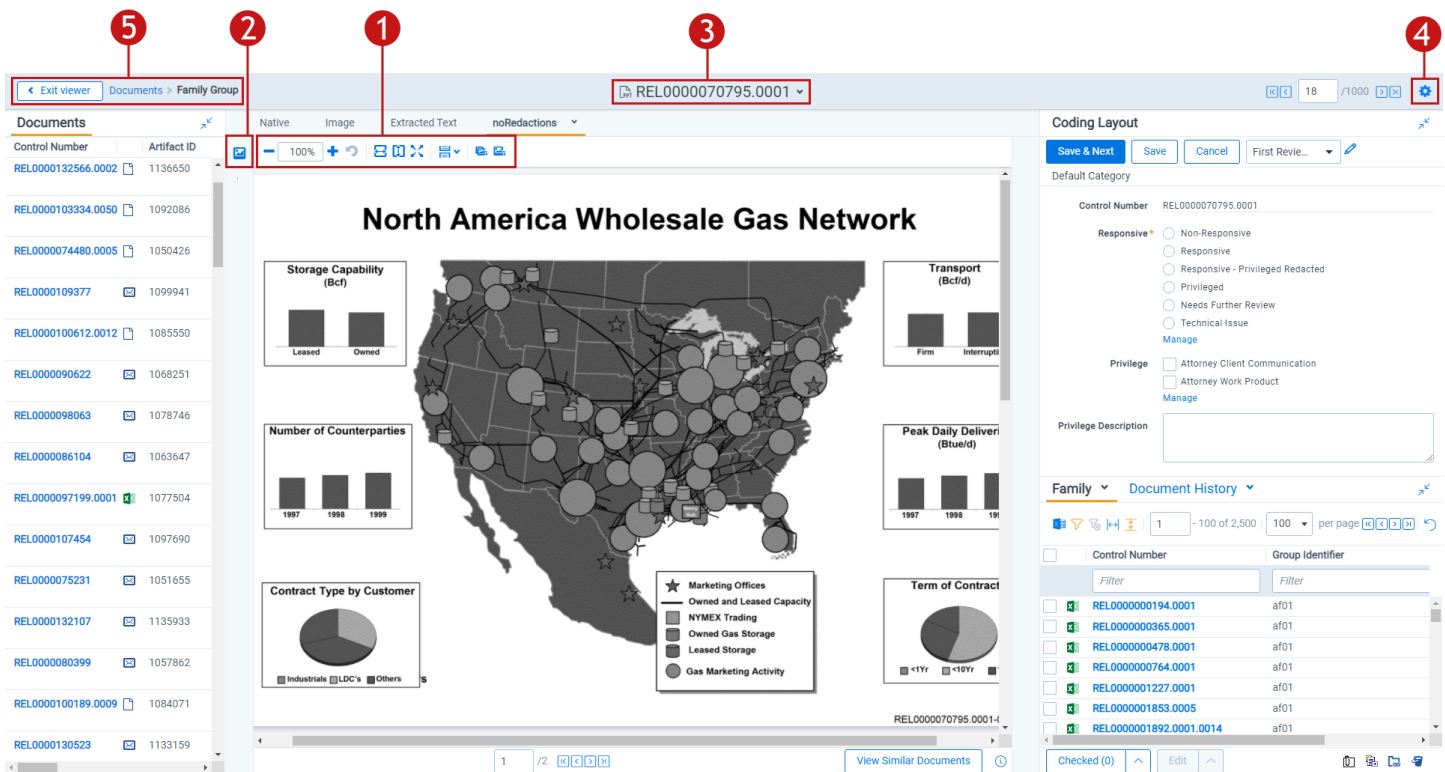
1. [Productions Viewer toolbar options](#)

2. [Left drawer Viewer options](#)

3. [Document actions menu](#)

4. [Viewer settings menu](#)

5. [Viewer breadcrumbs](#)

Each of these options and menus is described in more detail in the sections below.

9.4.1.1 Productions Viewer toolbar options

Productions Viewer provides the following options:

- **Zoom out/in** —zooms out and in on the current document in increments of 10% within a range of 10% to 4,000%. Your zoom setting persists as you navigate through a document set.
  To specify a zoom percentage without using the zoom out/in toolbar buttons, type the number in the percentage field and press the **Enter** key.

- **Reset zoom** —resets the zoom to 100%.

- **Fit width** —increases the size of the document to fit the maximum width of the Viewer. This setting persists when you re-size the window.

- **Fit page** ⬍ —fits the entire document into the total size of the page. Clicking this zooms out the document and reduces the font size.

- **Fit actual** ⤡ —fits the document display to the actual size it was in its native application. By default, this resets the zoom percentage to 100%.

- **Layout mode** ⬇ —select one of the following options to determine how documents that are more than one page long display in the Viewer.

  - **Single** ⬛ —one page of a document will display at a time. Use the page navigation options at the bottom of the Viewer to adjust which page you view.

  - **Single continuous** ⬛ —displays the pages in the document stacked vertically so you can scroll up and down to view them.

  - **Facing continuous** ⬛ —displays the pages in the document in a row horizontally so you can scroll left and right to view them.

- **Rotate all pages** 🖼 —rotates all pages in a document clockwise 90 degrees.

- **Rotate current page** 🖼 —rotates only the current page clockwise 90 degrees.

  > **Note:** Image rotation is persistent. Any pages that you rotate will be rotated the next time you return to them in the Viewer and for other users who view them after you rotate them. Rotation is also applied when you run the production containing the images.

- **Create PDF** 📄 —gives you the option of saving the image as a PDF. For more information, see Saving an image as a PDF. This option is only available if the PDF application is installed in your workspace.

9.4.1.2 Left drawer Productions Viewer options

The following options are available in the left drawer:

Thumbnail 🖼 —click to expand the left drawer and display the Thumbnail Viewer. Each page of the document you are reviewing has its own numbered thumbnail in the Thumbnail Viewer. To learn more, visit Thumbnail Viewer.

9.4.1.3 Document actions menu
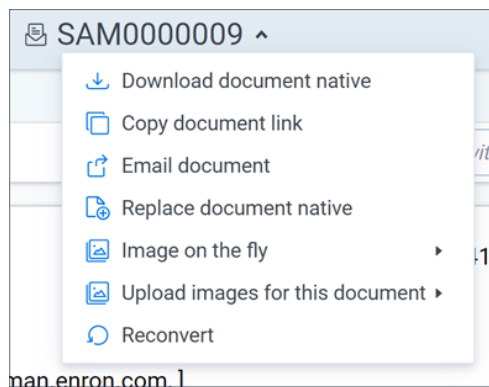
To learn more about these options, see Document actions menu.

9.4.1.4 Viewer settings menu
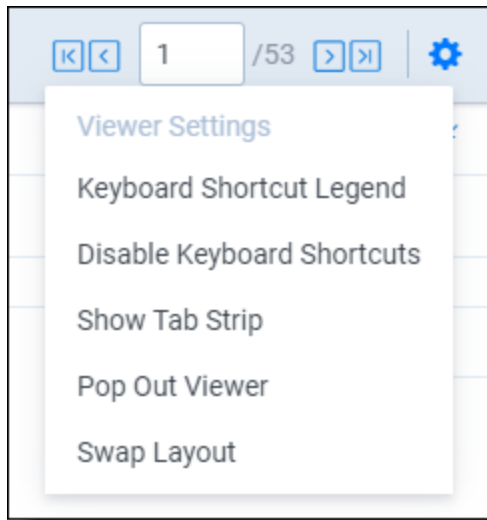
To learn more about these options, see Viewer settings menu.

9.4.1.5 Viewer breadcrumbs

The Viewer breadcrumbs help you track your current location while browsing documents in the Related items card. The information on your current location updates as you navigate. If Documents is an active link, you can click it to return to the document you were viewing before browsing documents in the Related items card.
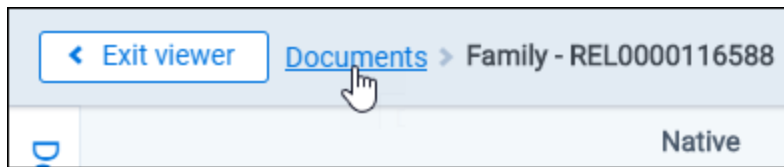
Additionally, to exit the Viewer and return to the page you were previously on, you can click the **Exit viewer** button at any time.

9.4.2 Imaging on the fly

You can image a single document in the Viewer by selecting the Image on the fly option from the Document actions menu at the top-center of the page.

Using this feature, you can select any imaging profile you have permissions to view and use it to image the document.

> **Note:** If the source file of the document you are imaging is changed during the conversion process, for example through overlay, that document becomes undeliverable and you receive an error. To resolve this error, refresh the page or re-image the document.

After imaging a document on the fly, you can access thumbnail renderings of the imaged pages of the document.

Imaging some file formats can cause problems. Consider the following:

- Many .pdf files render and image very well. However, you may have problems rendering and imaging some .pdf files due to the variety of their content.

- While most Microsoft Office documents render and image well, you may experience issues when imaging documents with embedded files.

- You may have problems rendering and imaging vector-based documents like Visio and CAD.

For more information, see the Viewer-Supported File Types guide.

> **Note:** The default priority for all image-on-the-fly jobs is determined by the current value of theImageOnTheFlyJobPriorityDefaultentry in the Instance setting table.

9.5 PDF Viewer

The PDF Viewer allows you to view .pdf files in the Review Interface.

> **Note:** You may experience slowness if you try to open .pdf documents that are larger than 300 megabytes.

> **Note:** The Viewer displays .pdf text by mapping the character codes to Unicode in most cases. To check whether .pdf text has been properly encoded and will display correctly in the Viewer, copy the text in the original .pdf file and paste it into another application like Microsoft Word or Notepad. If the pasted text does not display correctly, the .pdf is not properly encoded. If the pasted text displays correctly in another application but not in the Viewer, contact Support for assistance.

There are options available in the following sections of the Viewer:
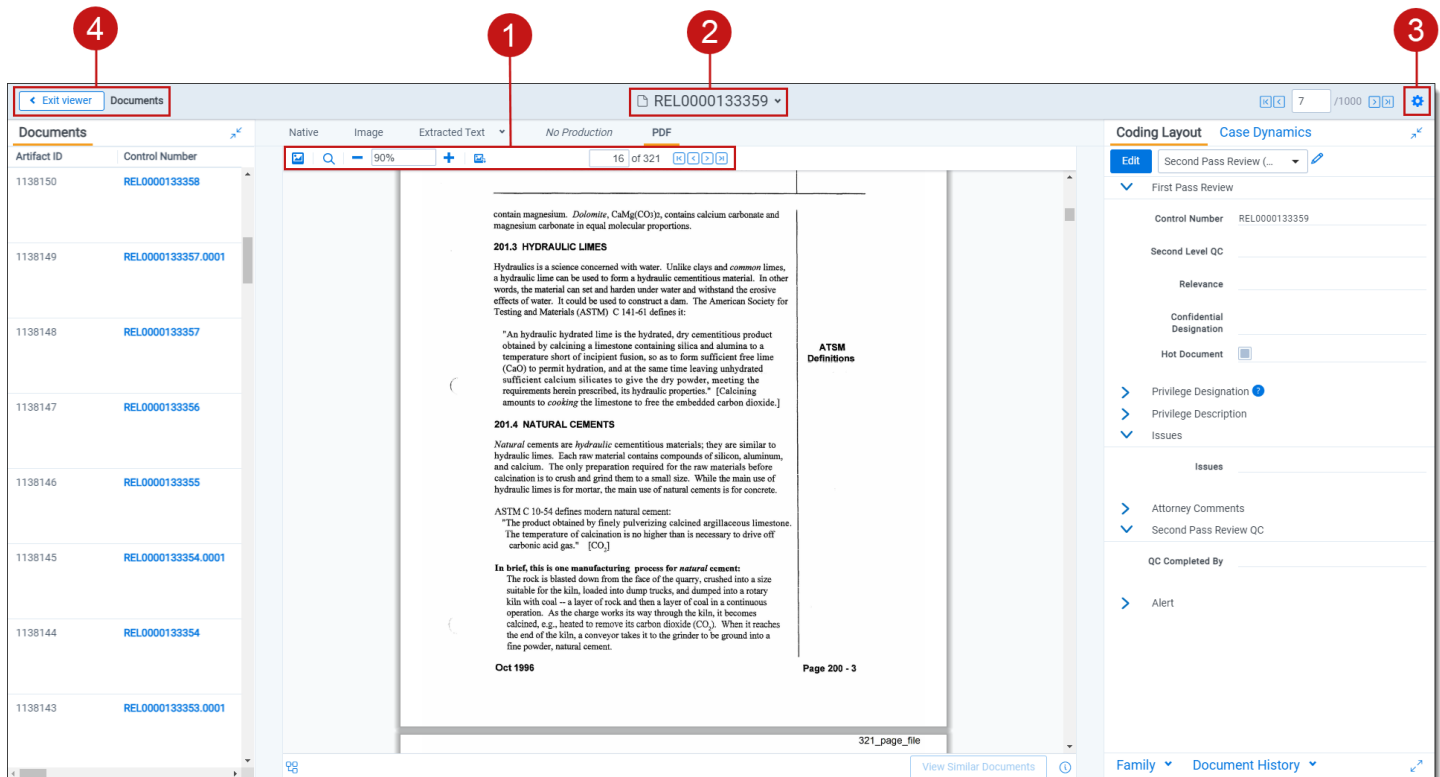
1. PDF Viewer toolbar options

2. Document actions menu

3. Viewer settings menu

4. Viewer breadcrumbs

Each of these options and menus is described in more detail in the sections below.

9.5.0.1 PDF Viewer toolbar options
The PDF Viewer provides the following options:

- **Thumbnail** —click to display the Thumbnail Viewer. Each page of the document you're reviewing has its own thumbnail in the Thumbnail Viewer. To learn more, visit Thumbnail Viewer.

- **Find in document** —searches for terms in the current PDF, if enabled, and navigates through the hits. The ability to search a PDF is determined by the Make Text Searchable option.

  - Entering a term and either clicking the left or right arrow button or pressing **Enter** in this text box scrolls to and highlights the text of the next instance of the term from the placement of the cursor.

  - Searching in this text box is not case sensitive.

- **Zoom out/in** 100% —zooms out and in on the current document in increments of 10% within a range of 10% to 4,000%. Your zoom setting persists as you navigate through a document set.
  To specify a zoom percentage without using the zoom out/in toolbar buttons, type the number in the percentage field and press the **Enter** key.
  Alternatively, click the percentage field and select the desired display option from the drop-down menu.

- **Rotate all pages** —rotates all pages in a document clockwise 90 degrees.

  Note: Image rotation is persistent. Any pages that you rotate will be rotated the next time you return to them in the Viewer and for other users who view them after you rotate them. Rotation is also applied when you run the production containing the images.

- **Page controls** 16 of 321 —allows you to navigate the pages in the .pdf file that is currently displayed in the PDF Viewer.

9.5.0.2 Document actions menu
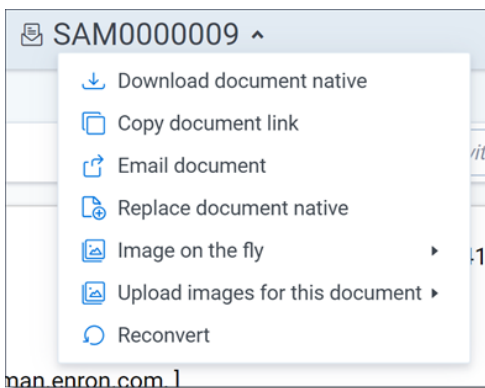
To learn more about these options, see Document actions menu.

9.5.0.3 Viewer settings menu
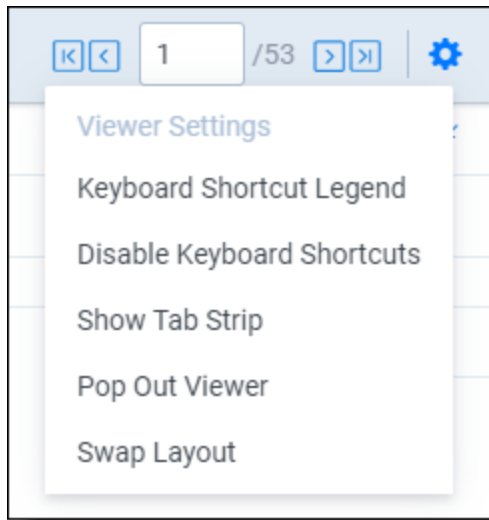
To learn more about these options, see Viewer settings menu.

9.5.0.4 Viewer breadcrumbs

The Viewer breadcrumbs help you track your current location while browsing documents in the Related items card. The information on your current location updates as you navigate. If Documents is an active link, you can click it to return to the document you were viewing before browsing documents in the Related items card.
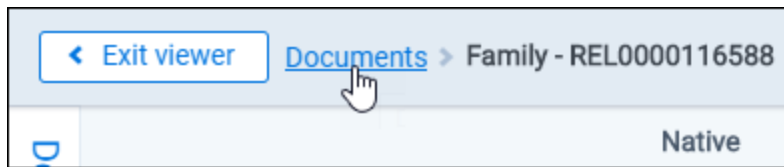
Additionally, to exit the Viewer and return to the page you were previously on, you can click the **Exit viewer** button at any time.

9.6 Document actions menu

The following options are available in the Document actions menu:
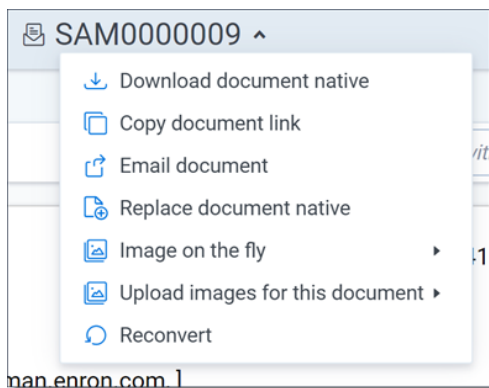
- **Download document native**—select to download a copy of the current document.

- **Copy document link**—select to copy the URL to the current document to your clipboard.

- **Email document**—select to open an email in your default email application with the URL to the current document included in the body of the email. The subject of the email will include the name of the workspace and the current document.

- **Replace document native**—select to replace the native file of the current document with a new file.

- **Image on the fly/Delete all images for this document**—image on the fly will display if the current document has not been imaged. If the current document has been imaged. Delete all images for this document will display instead.

  - **Delete all images for this document**—select to delete all original images associated with the current document.

    Note: If the document has produced images, these are not affected by this option. To remove the produced images from a document, delete the production set instead.

  - **Image on the fly**—to image the current document from the Viewer, hover your cursor over this option and the image profile options will display. Select the desired profile option to begin the imaging process.

- **Replace images for this document**—to replace the images for the current document using an imaging profile, hover your cursor over this option and select the desired imaging profile option to begin the imaging process.

- **Reconvert**—select to clear your internet browser's cache and reload the current document for review.

9.7 Viewer settings menu

The following options are available in the Viewer settings menu:
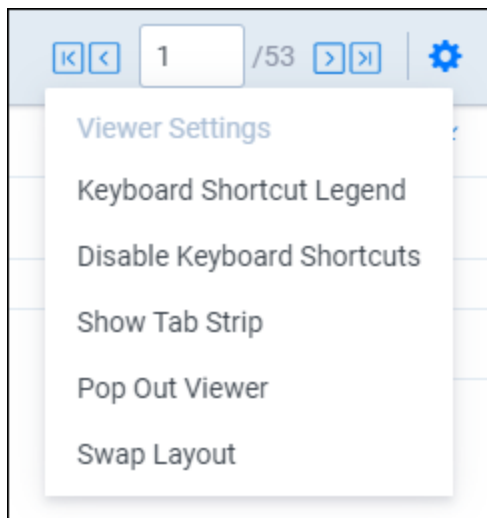
- **Keyboard Shortcut Legend**—select to open the Keyboard shortcut legend pop-up to view the current keyboard shortcuts available in the Viewer.

- **Enable/Disable Keyboard Shortcuts**—select to enable or disable the keyboard shortcuts feature while in the Viewer.

- **Show/Hide Tab Strip**—select to show or hide the sidebar and tab strip in the Native Viewer.

- **Pop Out Viewer**—select to open the Viewer in a new window in your browser. To learn more, visit Pop Out Viewer.

- **Swap Layout**—select to move the coding layout and the document card to the opposite side of the Viewer from where they are currently located.

9.7.1 Pop Out Viewer

You can use the Pop Out Viewer to open the Viewer in a new window in your browser. The document card and the coding card remain in the previously opened browser window and can be expanded to a greater width to take advantage of the space freed up by the Pop Out Viewer. The Pop Out Viewer retains the same functionality as the Viewer. For example, you can switch Viewer types and view highlights or the Thumbnail Viewer as desired.
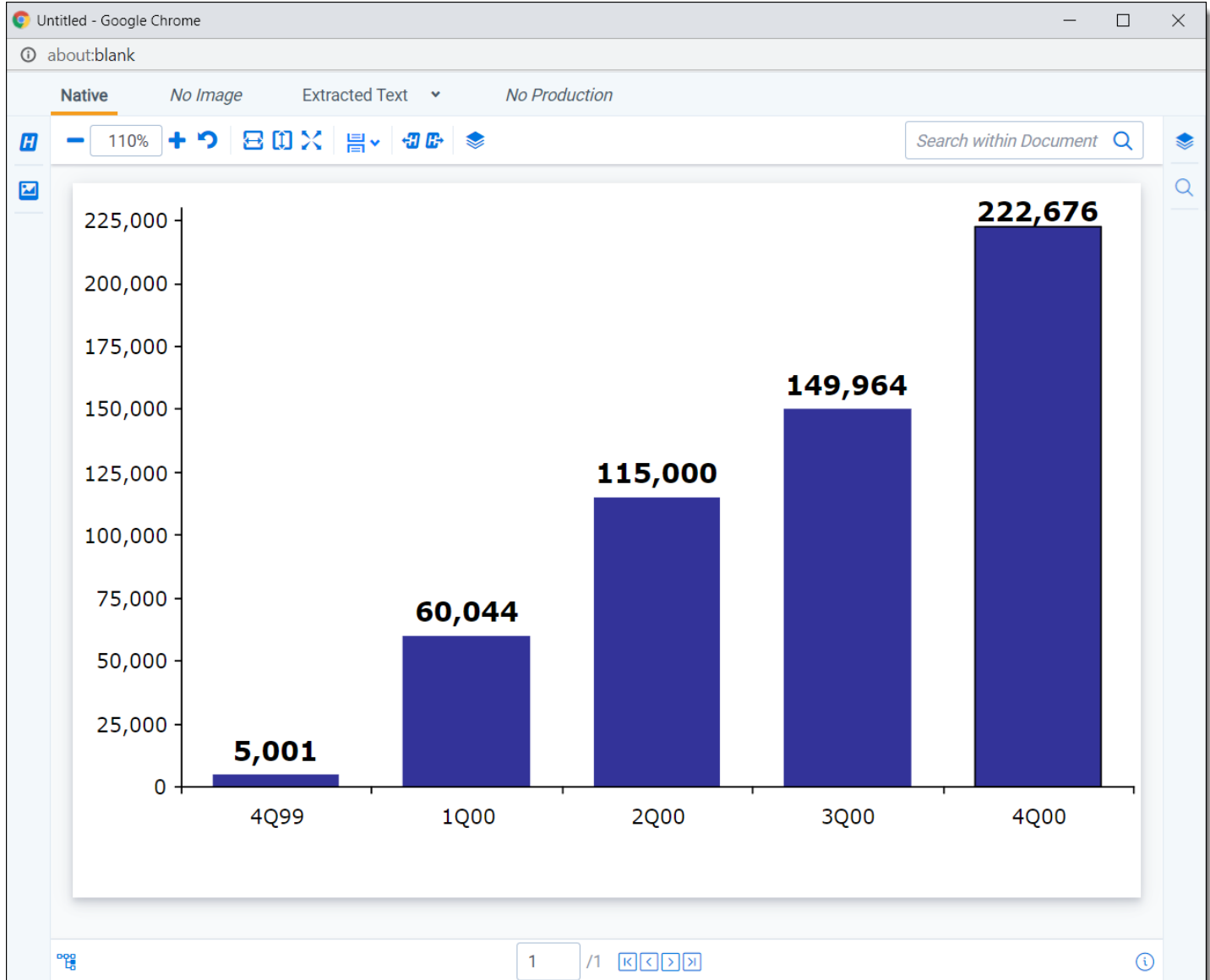
To open the Pop Out Viewer in a new browser window, select the **Pop Out Viewer** option from the Viewer settings menu in the upper-right corner.
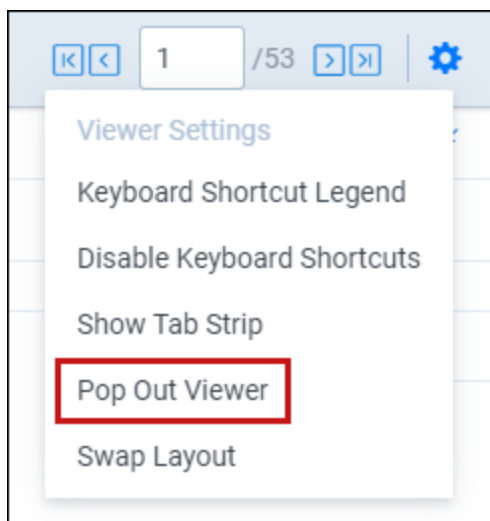
To return the Viewer to the previous browser window where the document card and coding card are located, you can click either the Pop In Viewer button on the previous browser window or you can select the Pop In Viewer option from the Viewer settings menu in the upper-right.
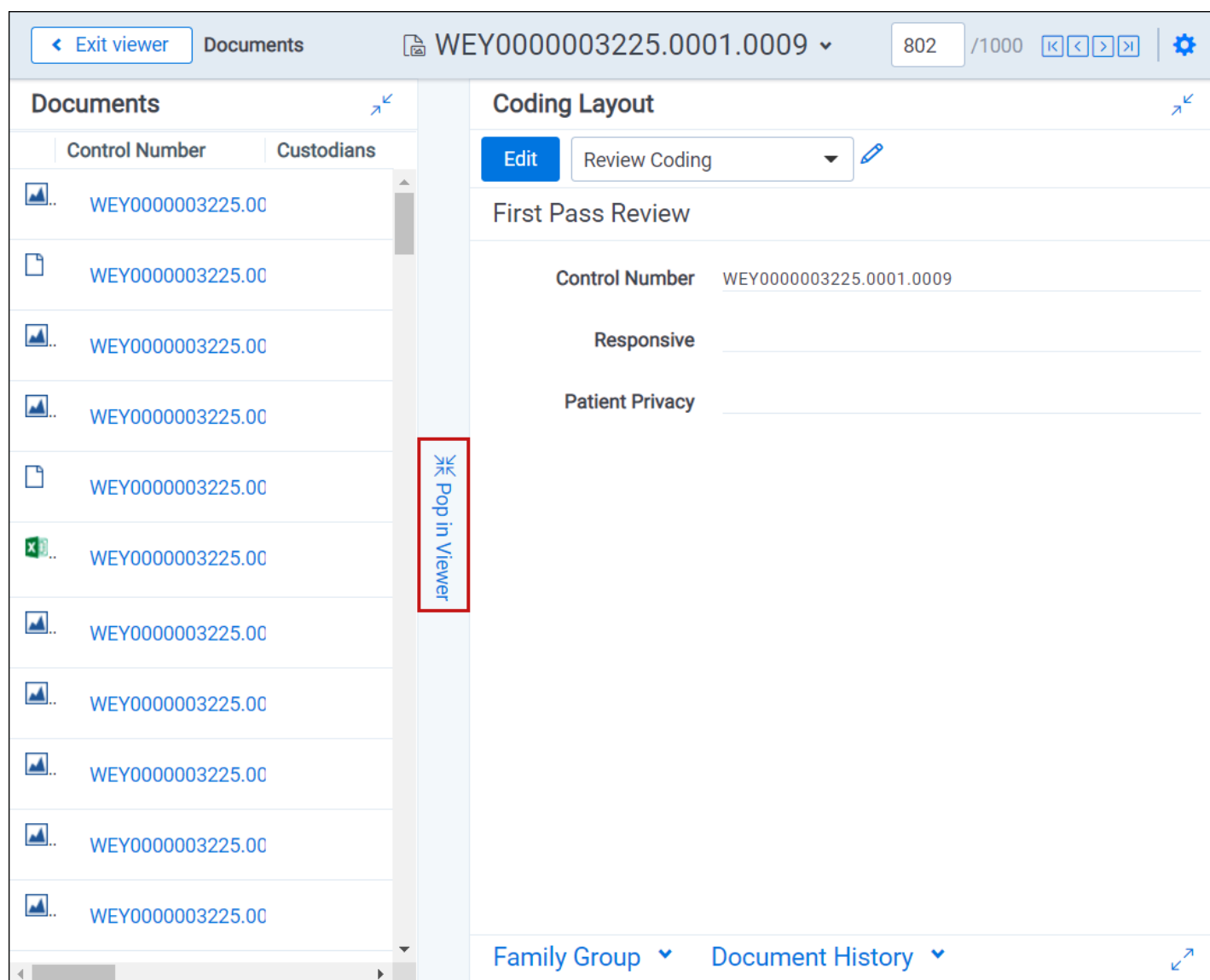
Alternatively, if you close the browser window that the popped out Viewer is in, the Viewer pops in to the review interface or in other words, returns to the original browser window.

9.7.2 Standalone Viewer

To view a document in a separate browser window, click the file icon in the document list or in the Viewer on the documents card or family card. Launching the Standalone Viewer from either the documents and family card launch the Review interface.
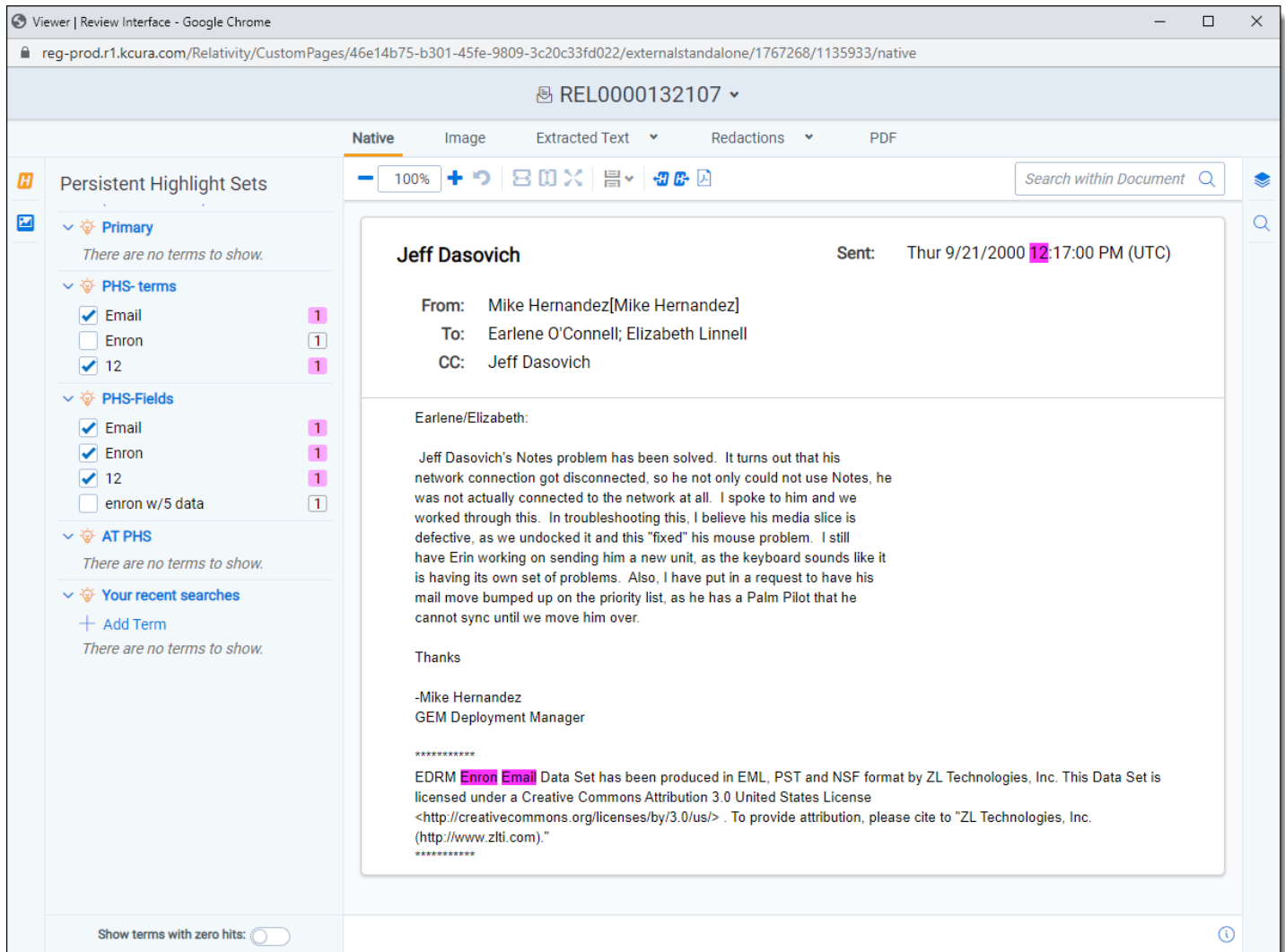
Keyboard shortcuts are available for use in the Standalone Viewer. For example, if you execute the shortcut for Save & Next in the Standalone Viewer, each window performs the operation and moves to the next document.

9.7.3 Document preview panel

The Document preview panel allows you to view documents in the document list before launching the Viewer. It also allows you to filter the list and quickly view documents in the results which makes the process of finding documents more efficient. To learn more, visit Document preview panel.

9.7.4 Related items card

The related items card is located at the bottom-right corner of the Viewer. Related items are customizable groups of documents within a workspace. Common examples are family groups, duplicates, or similar documents.

The Edit field will be available in the Related items card if you add it to the Relational card view.

The related items toolbar includes the following:

- **Related items** —displays a group of documents related to the active document. Options vary within the workspace. Hover over each icon to display the name of the item. Examples include: family group, duplicates, and thread group.

- **Document history** —displays a history of actions taken on the current document. You may not have access to document history. If you store your audits in Data Grid, this displays the field name, old value, and new value.
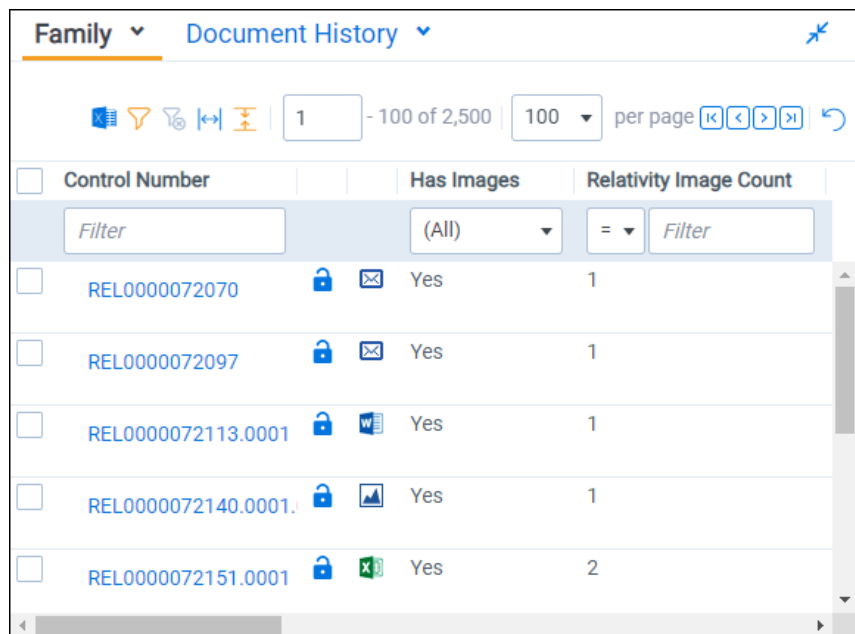
  Note: In the Document History card, you can click the **Details** link to display a pop-up with the audit history for the document. Click **Run Details** to display information about document imaging jobs, including the name of the imaging profile and the formatting options used during mass imaging or imaging on the fly.

- **Production** —displays all productions in which the document was included. You may not have permissions to view production information.

- **Linked** —displays all linked records on the active document.

- **Search results** —displays the results of an Analytics search.

- **Batch sets** ![icon]—shows all the batch sets for the active record. See Batches in the Admin manual. You may not have permissions to view this section.

When a coding decision is made, the information in the Related Items card automatically refreshes. If there are two or more reviewers on the same document, a user can refresh this card by clicking on the menu icon and selecting **Refresh card**.

The Related items card can be opened in a separate browser window. Click the menu icon and select **Pop out card** to open the card in its own window. Click the menu icon and select **Pop in card** to close the browser window and return the card to the Viewer.

9.7.4.1 Related items card actions

You can use the Related items card to quickly identify documents related to the active document. You can also use this card to act on those groups of related items.

For instance, in the example of the Related items card below, you can select some or all of the documents in the Related items card and click **Edit**. This opens a window for you to access all of your active layouts—the same layouts available in the layouts pane. Using these layouts, you can make coding decisions and apply them to the selected documents using mass editing. Alternatively, you can mass PDF, Save as List, Image, or Tally/Sum/Average. To learn more, see Mass operations in the Admin guide.

If you add the Edit field to your relational card view, you can click the Edit icon in the row of a document and immediately open that document in the Viewer with the layout ready to be edited.

9.8 Document and Production History card

The Document History and Production History card is located in the bottom-right of the Viewer. This card displays either the document history or the production history, depending on which you have selected. The Document History card displays information about the most recent actions taken by users with the current document. The Production History card displays information on any productions that the current document was included in.

You can filter the columns to help find information or export the information in the Document History card to a .csv file.

You can refresh this card by clicking on the Menu icon and selecting **Refresh card**.

The Document History card can be opened in a separate browser window. Click the Menu icon and select **Pop out card** to open the card in its own window. Click the Menu icon and select **Pop in card** to close the browser window and return the card to the Viewer.
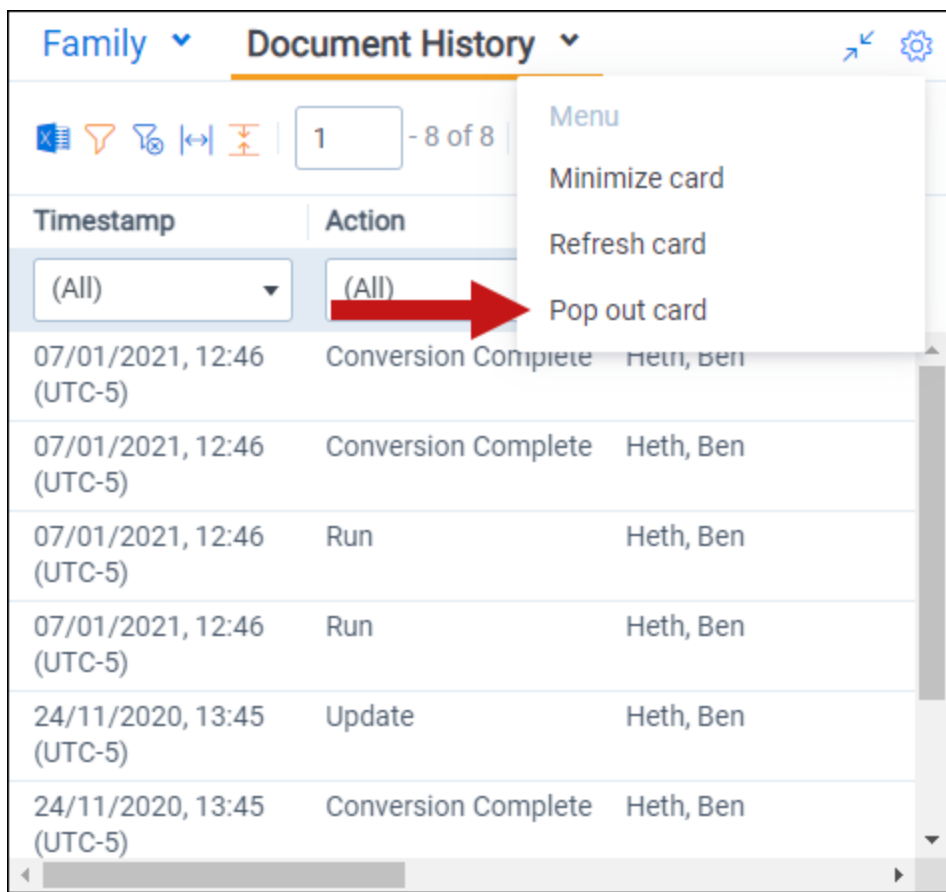
9.8.1 Document and Production History card permissions

The following permissions are required to access Document and Production History:

Object Security	Tab Visibility	Admin Operations
• **Document** - View • **Production** - View		• View All Audits

9.9 .eml and .msg header dates and times in the Viewer

.eml and .msg documents have header dates and times in Coordinated Universal Time (UTC) format. The Relativity Native Time Zone Offset field determines how the Viewer handles time zones for .eml, .msg, and RSMF documents.

Note: Relativity does not automatically account for Daylight Savings Time. If you need the Viewer to account for Daylight Savings Time, deploy the Set Native Timezone Offset with DST script. You must be a Relativity admin to deploy this script.

9.9.1 Documents card

The Documents card contains the document list so you can conveniently navigate from document-to-document without having to leave the Viewer. The fields that display in the card are based on which view is selected in the document list. Each time that you save a coding decision in the Viewer, the Documents card refreshes to show the

latest results. The highlighted document in the document list now updates when you navigate from document-to-document to make tracking even easier.
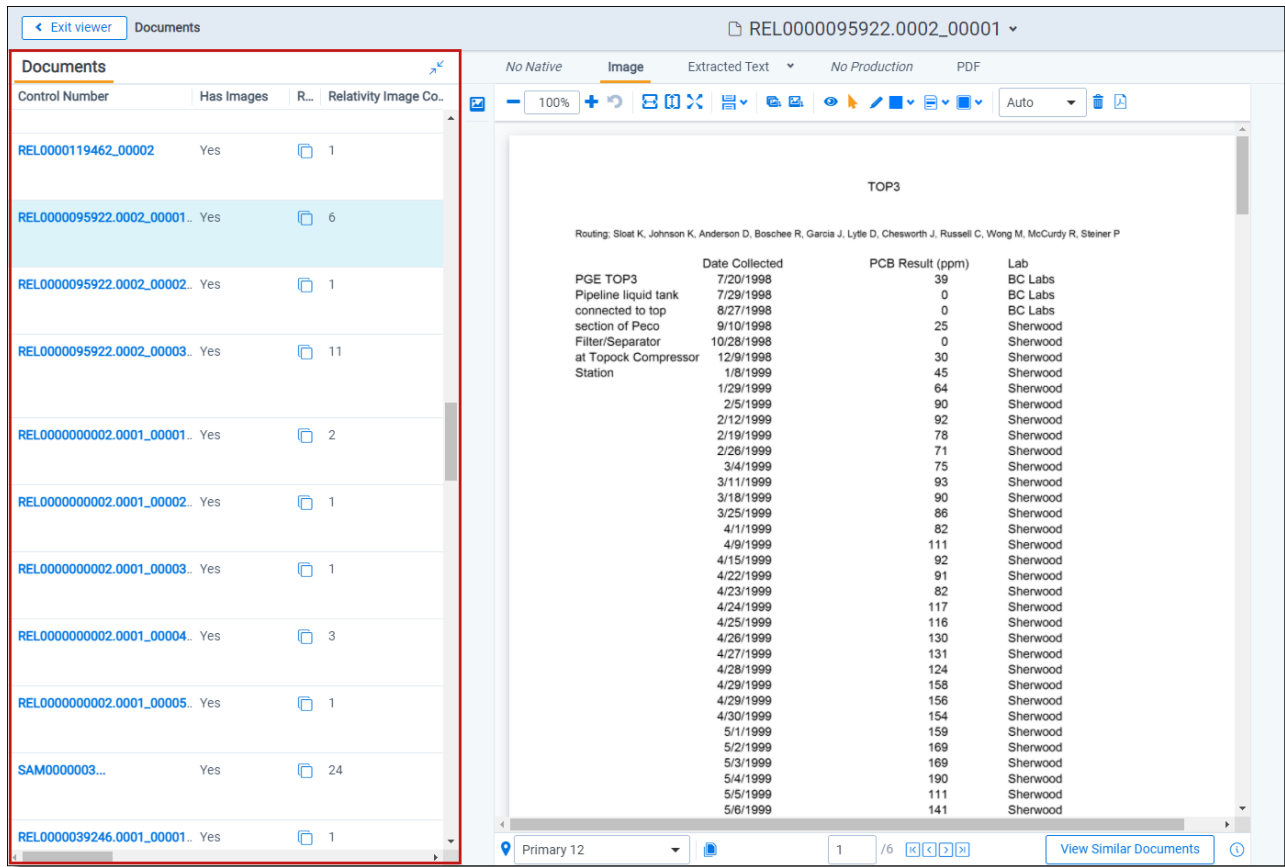
9.9.1.1 Securing Related items

Users are granted permissions or access to related items by default. If you would like to prevent a user from accessing these features, you can disable the following permissions or secure them using item-level security:

Related item	Permission or item-level security
Email Duplicates	Secure using Email Duplicate Spare Field
Thread Group	Secure using Email Thread Group Field
Near Dupe Group	Secure using Textual Near Duplicate Group Field
Conversational Family	Secure using the Conversation Family Field
Duplicates	Secure using the MD5 Hash Field
Family	Secure using the Group Identifier Field
Batches	Disable the View Batch Pane permission in Admin Operations
RAR Overturn Analysis	Disable the Assisted Review Overturn permission in Object Types
Production History	Disable the Production permission in Security
Linked Documents	Secure using the Link Pane view. This icon cannot be hidden but you can restrict access to it.
Document History	Disable the View All Audits permission in Admin Operations

Related item	Permission or item-level security
Search Results	This icon cannot be hidden or secured in Relativity.

9.9.2 Thumbnail Viewer

When in the Native Viewer, Image Viewer, or Productions Viewer, you can access and browse thumbnail renderings of a document's pages. Quickly scan, locate, and navigate to pages in an open document.

Beginning in 10.2.270.1, the Thumbnail Viewer displays highlights and redactions on the document. This requires that the ImageViewerHTMLConversionType instance setting is set to True.
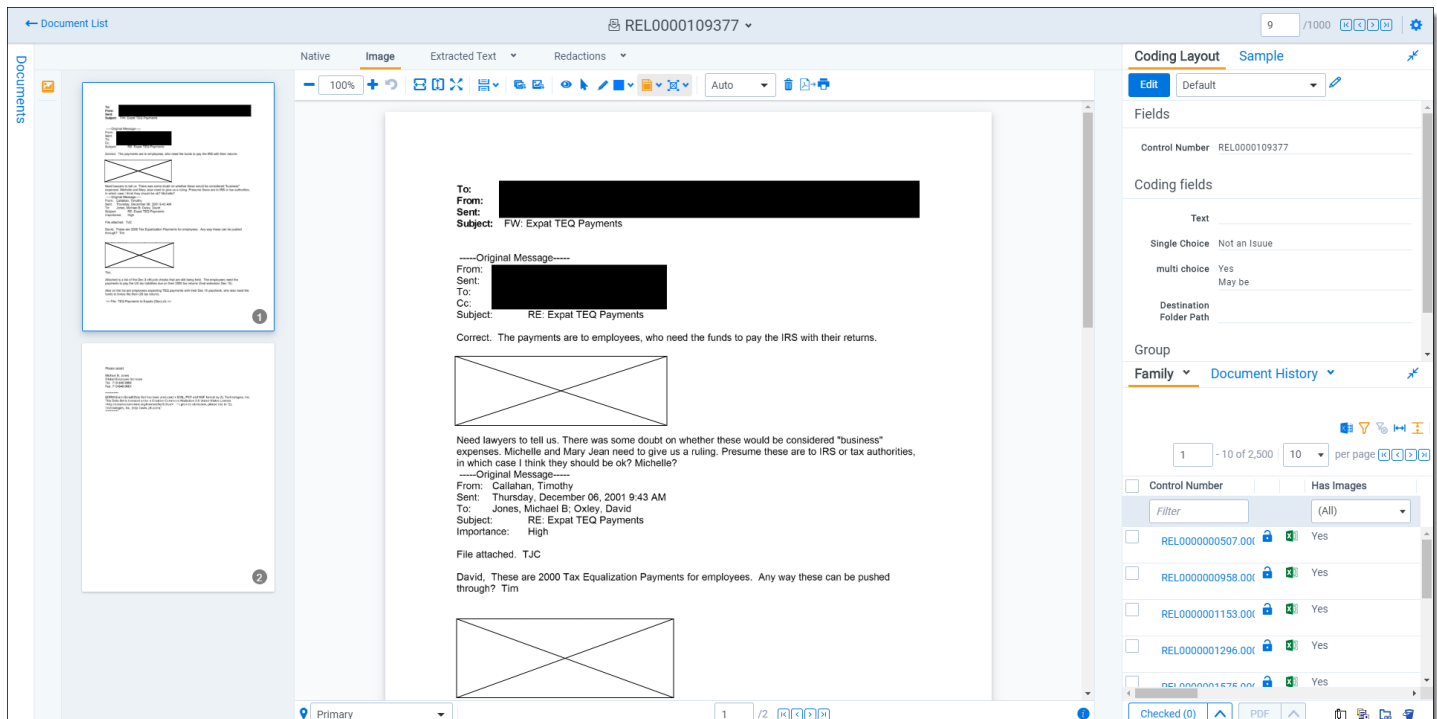
Note: Setting the ImageViewerHTMLConversionType instance setting to **True** may cause unexpected behavior with third-party Viewer integrations that interact with the Image Viewer or Productions Viewer. Please contact our Support team if you have any questions or would like more information.

To open the Thumbnail Viewer, click ![icon] in the left drawer. The left drawer expands and displays the Thumbnail Viewer. Scroll up and down to navigate all pages in the open document and click a page to view it. As you scroll through the document, the thumbnail viewer scrolls simultaneously to keep the viewed pages in focus.

The Thumbnail Viewer is compatible with word processor, presentation, vector Image, and raster image file types.

Note: The Thumbnail Viewer may not be available in the Native Viewer for document types that do not paginate such as spreadsheets or plain text.

Note: To access to the Thumbnail Viewer, you must have the Admin Operation permission View Image Thumbnails. If you don't have this permission, contact your system admin.

9.10 Document compare

You can use Document Compare to view the key differences between the extracted text of two documents. Unlike most fields, the Relativity Compare field is not visible on the Fields tab. To access Document Compare, you must first add the Relativity Compare system field to a view. See Views in the Admin guide.

To compare two documents in Relativity from the document list:

1. Click to open the Document Compare selection window. By default the document identifier of the selected document populates the Document Compare window.

2. Click by the With field to select a document with which to compare it. A Select Item pop-up window displays.

   Note: You can change the value of either of the fields at any time while in the Document Compare window.

3. Select the desired document from the list and click **Set**. The Document Compare window displays the selected document in the With field.

4. Click **Compare**. The window displays the similarities and differences between the documents.

5. The similarities and differences between the documents are reflected in the legend at the bottom of the window:

   - **Inserted** - text appears in the "With" document but doesn't appear in the "Compare" document.

   - **Deleted** - text appears in the "Compare" document but doesn't appear in the "With" document.

   - **Unchanged** -text appears in both documents.

Document Compare

Compare: LKITCHEN_0000583   ... Clear   With: LKITCHEN_0000574   ... Clear   **Compare**

obligations with respect to a Transaction, including, without limitation, all amounts then otherwise payable hereunder, determined in a commercially reasonable manner.

"Event of Default" means with respect to a party (the "Defaulting Party") any of the following: (i) the failure by the Defaulting Party to make, when due, any payment required hereunder[, hereunder or to provide credit support pursuant to Section 16, in each case] if such failure is not remedied within three days after notice of such failure is given to the Defaulting Party; (ii) any representation or warranty made by the Defaulting Party herein shall prove to have been false or misleading in any material respect; (iii) the breach by the Defaulting Party of any material covenant set forth herein other than the [obligation obligation to make payment] payment [covenants set forth in item (i) above] if such failure is not remedied within 30 days after notice of such failure is given to the Defaulting Party; (iv) the institution, with respect to the Defaulting Party, of a bankruptcy, reorganization, moratorium, liquidation or similar insolvency proceeding, or other relief under any bankruptcy or insolvency law affecting creditors' rights or a petition is presented or instituted for its winding-up or liquidation (a "Bankruptcy Event of Default"); (v) the Defaulting Party consolidates or amalgamates with, or merges into or with, or transfers substantially all of its assets to another entity and (a) the resulting entity fails to assume all of the obligations of the Defaulting Party hereunder or (b) the resulting entity's creditworthiness is materially weaker than that of the Defaulting Party; (vi) the Defaulting Party's failure to schedule the Daily Contract Quantity for a cumulative period of 45 or more days in a 12 month period in any one Transaction unless excused by Force Majeure or the other party's failure to perform its obligations hereunder (a "Scheduling Event of Default"); [or](vii) or (vii) an event of default occurs (howsoever determined) under any transaction consummated under the Spot General Terms & Conditions (Gas) between Company and counterparty (the "Spot GTC"), if any, or any transaction consummated under Base Contract For Short-Term Sale and Purchase of Natural Gas (GISB Form) between Company and counterparty (the "GISB Contract"), if any, or any other transaction between Company and counterparty for the purchase or sale of natural gas[; gas. (viii) the guarantor of the Defaulting Party fails to perform any covenant set forth in any guaranty agreement provided pursuant to Section 16, any representation or warranty made by the guarantor in such guaranty agreement shall prove to have been false or misleading in any material respect, or the guarantor shall take or suffer any actions set forth in item (iv) above as applied to it; or (ix) the issuer of a letter of credit provided pursuant to Section 16 shall fail to comply with or perform its obligations under such letter of credit if such failure shall be continuing after the lapse of any applicable grace period, or shall disaffirm, disclaim, repudiate or reject, in whole or in part, or challenge the validity of, such letter of credit, or shall take or suffer any actions set forth in item (iv) above as applied to it, or such letter of credit shall expire or terminate, or shall fail or cease to be in full force and effect at any time during the term of the Transaction for which it is issued without having been replaced].

4. Force Majeure. Except with respect to payment obligations, in the event either party is rendered unable, wholly or in part, by Force Majeure to carry out its obligations under a Transaction, it is agreed that upon such party's giving notice of such Force Majeure to the other party as soon as reasonably possible (to be confirmed in writing), the obligations of such party, to the extent they are affected by such event, shall be suspended from the inception and during the continuance of the Force Majeure. The cause of the Force Majeure shall be remedied with all reasonable dispatch by the party claiming same (the "Claiming Party"). No provision herein shall require or permit either party to schedule gas in excess of the Daily Contract Quantity or at points other than the Delivery Point(s).

Inserted   ~~Deleted~~   Unchanged

You can also compare related documents from within the viewer. To compare related documents in the viewer, open the Related Items pane and click next to the document you want to compare. The Document Compare selection window opens. The document you select from the Related Items pane automatically populates in the With field, while the document open in the viewer automatically populates the Compare field.

9.11 Viewer-supported file types

Relativity uses the Viewer to display rendered versions of native files. Reviewers can see how the file looked in its native application without opening the file in that native application.

When converting email file types such as EML, the Viewer will not download images from the internet. Any linked images will display as a gray box in the Viewer.

This document provides a comprehensive list of files types supported by the Viewer. Find out which Viewer version you have, by navigating to your Viewer and clicking .

See the Admin guide for more information on the Viewer.

Note: Relativity does not support any third-party applications after the user downloads a file. This includes specific browser and media-player combinations, such as Internet Explorer and Windows Media Player.

9.11.1 Text only designation

Some file types have a "text only" designation. When viewing these files in the Native Viewer, the document's text is the only data that renders. For Microsoft Project files and XML files, the view doesn't display items such as Gantt charts, icons, or other graphics. There is typically no formatting (bold, italics, fonts, etc.) of the text.

9.11.2 File ID only designation

Some file types have a "file ID only" designation. The Viewer is able to identify the file ID correctly, but it returns an error message indicating that the file format is not supported. Despite returning an error message, the Viewer identifies the file so that you can easily locate it and open it in an alternate application.

9.11.3 Supported File ID-only file types

The Viewer supports file ID-only functionality the following native file types. The supported file types are listed by category.

Program/File Type	Category	Type/Version	File Extension
Microsoft Access Report Snapshot	Database	2000-2003	
IBM Lotus Notes NSF	Email	7.x, 8.x	
DICOM	Multimedia		
Flash	Multimedia	9, 10	
Real Media	Multimedia		
MPEG-1 Video V 2	Multimedia		.mpg
MPEG-1 Video V 3	Multimedia		.mpg
MPEG-2 Audio	Multimedia		.mpg
Windows Media Playlist	Multimedia		
AOL Messenger	Other		
Microsoft InfoPath	Other	2007	
Microsoft Office Theme files	Other	2007-2013	
Microsoft Windows Compiled Help	Other		.chm
Microsoft Windows Explorer Command	Other		.scf
Microsoft Windows Help	Other		.hlp
Microsoft Windows Shortcut	Other		.ink
Trillian XML Log File	Other	4.2	
Adobe Photoshop PSD	Raster		
TrueType Font	Other		.ttf, .ttc
WebP	Raster		
XHTML	Text and	1.0	

Program/File Type	Category	Type/Version	File Extension
	Markup		
Visio XML VSX	Vector Image	2007	
Microsoft Publisher	Word Processing	2003-2007	
Samsung JungUm Global	Word Processing		
Strict Open XML - Presentation **Note:** Relativity does not support the password protected version for these three Strict Open XML file formats.	Presentation	2013, 2016	
Strict Open XML - Spreadsheet	Spreadsheet	2013, 2016	
Strict Open XML - Document	Word Processing	2013, 2016	

9.11.4 Supported Text-only file types

The Viewer supports text-only functionality the following native file types. The supported file types are listed by category.

Program/File Type	Category	Type/Version	File Extension
Microsoft Access	Database	1.0, 2.0, 95 - 2010	.accdb, .mdb
Flash	Multimedia	6.x, 7.x, Lite	.swf
Microsoft Excel for Windows	Spreadsheet	2003 XML	.xml
XML	Text and markup		.xml
Microsoft XPS	Vector Image		
Visio	Vector Image	2013	
Lotus WordPro	Word processing	9.7, 96 - Millennium 9.8	.lwp, .mwp
Microsoft Word for Windows	Word Processing	2003 XML	

9.11.5 Supported File types

The Viewer supports the following native file types. The supported file types are listed by category.

Program/File Type	Category	Type/Version	File Extension
7z **Note**: BZIP2 and split archives are not supported.	Archive		.7z
7z Self Extracting exe **Note**: BZIP2 and split archives are not supported.	Archive		.exe
LZA Self Extracting Compress	Archive		.lza

Program/File Type	Category	Type/Version	File Extension
LZH Compress	Archive		.lzh
Microsoft Office Binder	Archive	95, 97	.obd
Microsoft Cabinet (CAB)	Archive		.cab
PKZip	Archive		.zip
RAR	Archive	1.5, 2.0, 2.9	.rar
UNIX Compress	Archive		.z
UNIX GZip	Archive		.gz
UNIX tar	Archive		.tar
Uuencode	Archive		.uue
Zip	Archive	PKZip, WinZip	.zip
DataEase	Database	4.x	.dba
DBase	Database	III, IV, V	.dbf
First Choice DB	Database	Through 3.0	.fol
Framework DB	Database	3.0	
Microsoft Access	Database	2007/2010	.accdb
Microsoft Works DB for DOS	Database	2.0	.wdb
Microsoft Works DB for Macintosh	Database	2.0	.wdb
Microsoft Works DB for Windows	Database	3.0, 4.0	.wdb
Microsoft Works DB for DOS	Database	1.0	.wdb
Paradox for DOS	Database	2.0 - 4.0	.db
Paradox for Windows	Database	1.0	.db
Q&A Database	Database	Through 2.0	.db
R:Base	Database	R:Base 5000, R:Base System V	.rb1, .rb2, .rb3
Reflex	Database	2.0	.rdx
SmartWare II DB	Database	1.02	.db
Apple Mail Message (EMLX)	Email	2.0	.emlx
Encoded mail messages	Email	- MHT - Multi Part Alternative - Multi Part Digest - Multi Part Mixed	

Program/File Type	Category	Type/Version	File Exten-sion
		• Multi Part News Group • Multi Part Signed • TNEF	
EML with Digital Signature **Note:** .EML files that have a password or are encrypted are not supported in the Viewer. These documents will display the attachment but the body will appear blank.	Email	SMIME	.eml
IBM Lotus Notes Domino XML Language DXL	Email	8.5	.xml
IBM Lotus Notes NSF (Win32, Win64, Linux x86-32 and Oracle Solaris 32-bit only with Notes Client or Domino Server)	Email	8.x	.nsf. .ntf
MBOX Mailbox **Note:** Any MBOX file that is ingested into Relativity using the Relativity Desktop Client will display as an archive, regardless of how many messages it may have or what extension it might have. An MBOX file is characterized as a text file with the string "From<space>email address<space>date string". When a file of this nature is viewed in Relativity, it may appear to only show summaries of messages. Essentially, if that "from" line is at the top of the document, Relativity treats it as MBOX and displays it as an archive.	Email	RFC 822	.mbox
Microsoft Outlook (MSG)	Email	97 - 2013	.msg
Microsoft Outlook (OST)	Email	97 - 2010, 2013	.ost
Microsoft Outlook (PST)	Email	97 - 2013	.pst
Microsoft Outlook Express (EML)	Email		.eml
Microsoft Outlook Forms Template (OFT)	Email	97 - 2013	.oft
Microsoft Outlook OLM for Mac	Email	2011	
Microsoft Outlook PST (Mac)	Email	2001	.pst
MSG with Digital Signature **Note:** .MSG files that have a password or are encrypted are not supported in the Viewer. If you open an .MSG file that is encrypted in the Viewer, the body of the document will be blank and the contents of the encrypted data is placed into a single attachment with a .p7m file extension.	Email	SMIME	.msg
Microsoft Live Messenger (via XML filter)	Other	10.0	
Microsoft OneNote	Other	2007, 2010, 2013	.one

Program/File Type	Category	Type/Version	File Extension
Note: The Viewer does not support OneNote files with the Relativity Native type: Microsoft OneNote SOAP/HTTP File.			
Microsoft Outlook, Google Calendar, and Apple Calendar	Other		.ics
Microsoft Project (sheet view only, Gantt Chart, Network Diagram, and graph not supported)	Other	98-2013	.mpp
Microsoft Project (sheet view only, Gantt Chart, Network Diagram, and graph not supported)	Other	2007, 2010, 2013	.mpp
Microsoft Windows DLL	Other		.dll
Microsoft Windows Executable	Other		.dll
Trillian Text Log File (via text filter)	Other	4.2	.txt
vCalendar	Other	2.1	.vcs
vCard	Other	2.1	.vcf
Yahoo! Messenger	Other	6.x – 8	.yps
Apache Office Draw (ODF 1.2)	Presentation	3.x, 4.x	
Apache Office Impress (ODF 1.2)	Presentation	3.x, 4.x	
Apple iWork Keynote (MacOS, text and PDF preview)	Presentation	09	.key, .keynote
Harvard Graphics Presentation DOS	Presentation	3.0	.prs
IBM Lotus Symphony Presentations	Presentation	1.x	
Kingsoft WPS Presentation	Presentation	2010	
Libre Office Draw (ODF 1.2)	Presentation	3.x, 4.x	
Libre Office Impress (ODF 1.2)	Presentation	3.x, 4.x	
Lotus Freelance	Presentation	1.0 - Millennium 9.8	.prz
Lotus Freelance for OS/3	Presentation	2	
Lotus Freelance for Windows	Presentation	95, 97, SmartSuite 9.8	
Microsoft PowerPoint for Macintosh	Presentation	4.0 - 2011	.ppt
Microsoft PowerPoint for Windows	Presentation	3.0 – 2013	.ppt
Microsoft PowerPoint 2016 **Note:** Beginning in Relativity 12.2.190.4 (Prairie Smoke 1), .pptx files that have Ink drawings are supported in the Native and Image Viewer. Any documents with Ink drawings that were imported prior to Relativity 12.2.190.4 will need to be reconverted to take advantage of this new functionality.	Presentation	2016	.pptx
Microsoft PowerPoint for Windows Slideshow	Presentation	2007-2013	.ppt

Program/File Type	Category	Type/Version	File Extension
Microsoft PowerPoint for Windows Template	Presentation	2007-2013	.pot
Novell Presentations	Presentation	3.0, 7.0	.shw
OpenOffice Impress	Presentation	1.1, 3.0	.sdd
Oracle Open Office Impress	Presentation	3.x	.odp
StarOffice Impress	Presentation	5.2 - 9.0	.sda, .sdd
WordPerfect Presentations	Presentation	5.1 - X5	
Adobe Photoshop	Raster image	4.0	.psd
Adobe Photoshop XMP only	Raster image	8.0 - 10.0 (CS 1-5)	
CALS Raster (GP4)	Raster image	Type I-II	.cg4, .cal
Computer Graphics Metafile	Raster image	ANSI, CALS, NIST	.cgm
Encapsulated PostScript (EPS)	Raster image	TIFF Header only	.eps
GEM Image (Bitmap)	Raster image		.bmp
Graphics Interchange Format (GIF)	Raster image		.gif
IBM Graphics Data Format (GDF)	Raster image	1.0	.gdf
IBM Picture Interchange Format	Raster image	1.0	.pif
HEIC Image file	Raster image		.heic
JBIG2	Raster image	Graphic Embeddings in PDF	
JFIF (JPEG not in TIFF format)	Raster image		.jfif
JPEG	Raster image		.jpg
JPEG 2000	Raster image	JP2	
Kodak Flash Pix	Raster image		.fpx
Kodak Photo CD	Raster image	1.0	.pcd
Lotus PIC	Raster image		.pic
Lotus Snapshot	Raster image		
Macintosh PICT	Raster image	BMP only	.bmp
Macintosh PICT2	Raster image	BMP only	.bmp
MacPaint	Raster image		.pntg
Microsoft Windows Bitmap	Raster image		.bmp
Microsoft Windows Cursor	Raster image		
Microsoft Windows Icon	Raster image		.ico
OS/2 Bitmap	Raster image		
OS/2 Warp Bitmap	Raster image		

Program/File Type	Category	Type/Version	File Extension
Paint Shop Pro (Win32 only)	Raster image	5.0, 6.0	.psp
PC Paintbrush (PCX)	Raster image		.pcx
PC Paintbrush DCX (multi-page PCX)	Raster image		.dcx
Portable Bitmap (PBM)	Raster image		.pbm
Portable Graymap PGM	Raster image		.pgm
Portable Network Graphics (PNG)	Raster image		.png
Portable Pixmap (PPM)	Raster image		.ppm
Progressive JPEG	Raster image		.jpg, .jpeg, .jpe
StarOffice Draw	Raster image	6.x - 9.0	
Sun Raster	Raster image		.srs
TIFF	Raster image	Group 5 & 6	.tif, .tiff
TIFF CCITT	Raster image	Group 3 & 4	
TruVision TGA (Targa)	Raster image	2.0	.tga
WBMP wireless graphics format	Raster image		
Word Perfect Graphics	Raster image	1.0	.wpg
WordPerfect Graphics	Raster image	2.0 – 10.0	.wpg, .wpg2
X-Windows Bitmap	Raster image	x10 compatible	.xbm
X-Windows Dump	Raster image	x10 compatible	.xdm
X-Windows Pixmap	Raster image	x10 compatible	.xpm
Apache Office Calc (ODF 1.2)	Spreadsheet	3.x, 4.x	
Apple iWork Numbers (MacOS, text, and PDF preview)	Spreadsheet	09	.numbers
Enable Spreadsheet	Spreadsheet	3.0 - 4.5	
First Choice SS	Spreadsheet	Through 3.0	
Framework SS	Spreadsheet	3.0	
IBM Lotus Symphony Spreadsheets	Spreadsheet	1.x	
Kingsoft WPS Spreadsheets	Spreadsheet	2010	
Libre Office Calc (ODF 1.2)	Spreadsheet	3.x, 4.x	
Lotus 1-2-3	Spreadsheet	Through Millennium 9.8	.wk1, .wk3, .wk4, .wks
Lotus 1-2-3 Charts (DOS and Windows)	Spreadsheet	Through 5.0	.wk1, .wk3, .wk4, .wks
Lotus 1-2-3 for OS/2	Spreadsheet	2.0	
Microsoft Excel Charts	Spreadsheet	2.x - 2007	.xlsx, .xls

Program/File Type	Category	Type/Version	File Extension
Microsoft Excel for Macintosh	Spreadsheet	98 – 2011	.xlsx, .xls
Microsoft Excel for Windows **Note:** Excel files with slicers will convert and display normally in the Viewer, but slicer elements in those files will not display.	Spreadsheet	3.0 - 2016	.xlsx, .xls
Microsoft Excel for Windows (.xlsb)	Spreadsheet	2007-2013 (Binary)	.xlsb
Microsoft Works SS for DOS	Spreadsheet	2.0	.wks
Microsoft Works SS for Macintosh	Spreadsheet	2.0	.wks
Microsoft Works SS for Windows	Spreadsheet	3.0, 4.0	.wks
Multiplan	Spreadsheet	4.0	.sylk
Novell PerfectWorks Spreadsheet	Spreadsheet	2.0	.wpw
OpenOffice Calc	Spreadsheet	1.1-3.0	.sdc
Oracle Open Office Calc	Spreasheet	3.x	.sdc
Office Calc (ODF 1.2)	Spreadsheet	4.x	
PFS: Plan	Spreadsheet	1.0	
QuattroPro for DOS	Spreadsheet	Through 5.0	.wb1
QuattroPro for Windows	Spreadsheet	Through X5	.qpw, .wb3, .wb2, .wb1
Quattro Pro Win	Spreadsheet	X7	.qpw
SmartWare II SS	Spreadsheet	1.02	.def
SmartWare Spreadsheet	Spreadsheet		.def
StarOffice Calc	Spreadsheet	5.2 – 9.0	.sdc
SuperCalc	Spreadsheet	5.0	.cal
Symphony	Spreadsheet	Through 2.0	.wrk
VP-Planner	Spreadsheet	1.0	
ANSI Text	Text and markup	7 & 8 bit	.ans
ASCII Text	Text and markup	7 & 8 bit	.asc
DOS character set	Text and markup		
EBCDIC	Text and markup		
HTML (CSS rendering not supported)	Text and markup	1.0 – 4.0	.html
IBM DCA/RFT	Text and		

Program/File Type	Category	Type/Version	File Extension
			markup
Macintosh character set	Text and markup		
Rich Text Format (RTF)	Text and markup		.rtf
Unicode Text	Text and markup	3.0, 4.0	.txt
UTF-8	Text and markup		
Wireless Markup Language	Text and markup		.wml
Adobe Illustrator	Vector image	4.0 – 7.0, 9.0	
Adobe Illustrator (PDF Preview only)	Vector image	9.0, CS1-6	.pdf
Adobe Illustrator XMP	Vector image	11 – 13 (CS 1 - 5)	
Adobe InDesign XMP	Vector image	3.0 – 5.0 (CS 1 - 5)	
Adobe InDesign Interchange XMP only	Vector image		
Adobe PDF	Vector image	1.0 – 1.7 (Acrobat 1 - 10)	.pdf
Adobe PDF Package	Vector image	1.7 (Acrobat 8 - 10)	.pdf
Adobe PDF Portfolio	Vector image	1.7 (Acrobat 8 - 10)	.pdf
Ami Draw	Vector image	SDW	.sdw
Apple iWork Keynote File Preview	Vector	09	.key, .keynote
Apple iWork Keynote Numbers File Preview	Vector	09	.numbers
Apple iWork Pages File Preview	Vector	09	.pages
AutoCAD Drawing	Vector image	2.5, 2.6, 9.0-14.0, 2000i -2012	.dwg
AutoCAD Drawing	Vector	2013	.dwg
AutoShade Rendering	Vector image	2	.rnd
Corel Draw	Vector image	X4 - X7	.cdr
Corel Draw Clipart	Vector image	5.0, 7.0	.cmx
Enhanced Metafile (EMF)	Vector image		.emf
Escher Graphics	Vector image		.egr
FrameMaker Graphics (FMV)	Vector image	3.0 – 5.0	.fmv

Program/File Type	Category	Type/Version	File Extension
Gem File (Vector)	Vector image		.img
Harvard Graphics	Vector	98	.cht
Harvard Graphics Chart DOS	Vector image	2.0 – 3.0	.ch3
Harvard Graphics for Windows	Vector image		.prs
HP Graphics Language	Vector image	2.0	.hp, .hpg
IGES Drawing	Vector image	5.1 – 5.3	.iges
Micrografx Designer	Vector image	Version 6	.dsf
Micrografx Designer	Vector image	Through 3.1	.drw
Micrografx Draw	Vector image	Through 4.0	.drw
Novell PerfectWorks Draw	Vector image	2.0	
OpenOffice Draw	Vector image	1.1 – 3.0	.sda
Oracle Open Office Draw	Vector image	3.x	.sda
SVG (processed as XML, not rendered)	Vector image		.xml
Microsoft Visio: • Stencil • Template • Macro Enabled Drawing • Macro Enabled Stencil • Macro Enabled Template	Vector image	5.0 – 2007, 2013	.vsd
Visio (Page Preview mode WMF/EMF)	Vector image	4.0	.wmf, .emf
Windows Metafile	Vector image		.vmf
Adobe FrameMaker (MIF only)	Word processing	3.0 - 6.0	.mif
Adobe Illustrator Postscript	Word processing	Level 2	.eps
Ami	Word processing		
Ami Pro for OS2	Word processing		.sam
Ami Pro for Windows	Word processing	2.0, 3.0	.sam
Apache Office Writer (ODF 1.2)	Word processer	3.x, 4.x	
Apple iWork Pages (MacOS, text and PDF preview)	Word processing	09	.pages

Program/File Type	Category	Type/Version	File Extension
DEC DX	Word processing	Through 4.0	.dx
DEC DX Plus	Word processing	4.0, 4.1	.dx, .wpl
Enable Word Processor	Word processing	3.0 - 4.5	
First Choice WP	Word processing	1.0, 3.0	.pfx
Framework WP	Word processing	3.0	
Hangul	Word processing	97 - 2010	.hwp
IBM DCA/FFT	Word processing		.dca, .fft
IBM DisplayWrite	Word processing	2.0-5.0	.rft, .dca
IBM Writing Assistant	Word processing	1.01	.iwa
Ichitaro	Word processing	5.0, 6.0, 8.0 - 13.x, 2004 - 2014	.jtd
JustWrite	Word processing	Through 3.0	.jw
Kingsoft WPS Writer	Word processing	2010	.wps
Legacy	Word processing	1.1	.leg
Libre Office Writer (ODF 1.2)	Word processor	3.x, 4.x	
Lotus Manuscript	Word processing	Through 2.0	.manu
MacWrite II	Word processing	1.1	.mcw
Mail Rule DXL	Word processing		
Mass 11	Word processing	Through 8.0	.m11
Microsoft Word for DOS	Word processing	4.0 – 6.0	.doc
Microsoft Word for Macintosh	Word processing	4.0-6.0, 98 - 2016	.doc

Program/File Type	Category	Type/Version	File Extension
Microsoft Word for Windows	Word processing	1.0 – 2016	.doc, .docx
Microsoft WordPad	Word processing		.rtf
Microsoft Works WP for DOS	Word processing	2.0	.wps
Microsoft Works WP for Macintosh	Word processing	2.0	.wps
Microsoft Works WP for Windows	Word processing	3.0, 4.0	.wps
Microsoft Write for Windows	Word processing	1.0 – 3.0	.wri
MultiMate	Word processing	Through 4.0	.dox
MultiMate Advantage	Word processing	2.0	.dox
Navy DIF	Word processing		.dif
Nota Bene	Word processing	3.0	.nb
Novell PerfectWorks Word Processor	Word processing	2.0	.wpw
OfficeWriter	Word processing	4.0-6.0	
OpenOffice Writer	Word processing	1.1 - 3.0	.sdw
Oracle Open Office Writer	Word processing	3.x	.sdw
PC File Doc	Word processing	5.0	
PFS: Write	Word processing	A, B	.pfs
Professional Write for DOS	Word processing	1.0, 2.0	
Professional Write Plus for Windows	Word processing	1.0	
Q&A Write	Word processing	2.0, 3.0	.jw
Samna Word IV	Word processing	1.0 – 3.0	.sam

Program/File Type	Category	Type/Version	File Extension
Samna Word IV+	Word processing		.sam
Signature	Word processing	1.0	
SmartWare II WP	Word processing	1.02	.def
Sprint	Word processing	1.0	.spr
StarOffice Writer	Word processing	5.2 – 9.0	.sdw
Total Word	Word processing	1.2	
Wang IWP	Word processing	Through 2.6	.iwp
WordMarc Composer	Word processing		
WordMarc Composer+	Word processing		
WordMarc Word Processor	Word processing		
WordPerfect for DOS	Word processing	4.2	.wpd
WordPerfect for Macintosh	Word processing	1.02 - 3.1	.wpd
WordPerfect for Windows	Word processing	5.1 – X5	.wpd
Wordstar 2000 for DOS	Word processing	1.0 - 3.0	.wsd
Wordstar for DOS	Word processing	3.0 - 7.0	(none defined)
Wordstar for Windows	Word processing	1.0	.ws1
XyWrite	Word processing	Through III+	.xy

Note: Program/file types listed with text only or PDF preview only can be reviewed in the Viewer as listed. If PDF preview only, a PDF file saved as part of the native will be viewed. Text only will just display the text without any formatting.

9.11.6 Viewer audio and video-supported file types

Relativity can stream audio and video files within the Viewer.

This document provides a comprehensive list of files types supported by the Viewer. Certain file types may not be compatible with your internet browser, refer to the sections below to learn more about browser compatibility. Find out which Viewer version you have, by navigating to your Viewer and clicking 🛈 .

See the Admin guide for more information on the Viewer.

> **Note:** Relativity does not support any third-party applications after the user downloads a file. This includes specific browser and media-player combinations, such as Internet Explorer and Windows Media Player.

9.11.7 Troubleshooting errors

If an audio or video file cannot be streamed in the Viewer, one of the following messages will display:

Unable to play audio stream
- Your browser may not support the audio codec.
- The native file may not have an audio stream.
- The native file may be partially corrupted.

Unable to play video stream
- Your browser may not support the video codec.
- The native file may not have a video stream.
- The native file may be partially corrupted.

Sorry, we're experiencing playback issues with this multimedia file.
- Ensure that you are connected to Relativity.
- Your browser may not fully support this multimedia format.
- The native file may be partially corrupted.

To resolve the error, ensure that your internet browser can play the selected file type. If that does not resolve the error, check the **MaximumNativeSizeForViewerForMediaFilesinMegaBytes** instance setting to ensure that the file type is not too big for the Viewer to stream.

9.11.8 Supported audio file types

> **Note:** Safari works with Mac OSX only.

File Format	Container - Audio Codec	Chrome	Firefox	Internet Explorer	Safari
FI_RIFFWAVE	wave - pcm	√	√	√	
Quicktime Movie	mov - aac	√	√	√	√
Quicktime Movie	mov - vorbis	√			
MPEG Layer3 ID3 Ver 1.x	mp3 - mp3	√	√	√	
MPEG Layer3 ID3 Ver 2.x	mp3 - mp3	√	√	√	√
FI_MPGAV2L3	mp3 - mp3	√	√	√	
MPEG-4 file	mp4 - aac	√	√	√	√
MPEG-4 file	mp4 - opus	√			
MPEG-4 file	mp4 - vorbis	√			
MPEG-1 audio - Layer 3	mov - mp3	√	√		√

File Format	Container - Audio Codec	Chrome	Firefox	Internet Explorer	Safari
MPEG-1 audio - Layer 2	mp4 - mp2	√	√		
MPEG-1 audio - Layer 3	mp4 - mp3	√	√	√	
Ogg Opus	ogg - opus	√	√		
Ogg Vorbis	ogg - vorbis	√	√		

9.11.9 Supported video file types

Note: Safari works with Mac OSX only.

File Format	Container - Video Codec - Audio Codec	Chrome	Firefox	Internet Explorer	Safari
Quicktime Movie	mov - h264 - aac	√	√	√	
Quicktime Movie	mov - h264 - dolby_digital	√	√		
Quicktime Movie	mov - h264 - mp2	√	Video-only		
Quicktime Movie	mov - h264 - mp3	√	√		√
Quicktime Movie	mov - h264 - vorbis	√	√		
Quicktime Movie	mov - h264 - wma1	√	√		
Quicktime Movie	mov - h264 - wma2	√	√		
Quicktime Movie	mov - mpeg4 - aac	Audio-only	Audio-only		√
Quicktime Movie	mov - mpeg4 - mp3	Audio-only	Audio-only		
Quicktime Movie	mov - mpeg4 - vorbis	Audio-only			√
Quicktime Movie	mov - theora - aac	√	Audio-only		
Quicktime Movie	mov - theora - dolby_digital	√			
Quicktime Movie	mov - theora - mp2	√			
Quicktime Movie	mov - theora - mp3	√	Audio-only		
Quicktime Movie	mov - theora - vorbis	√			
Quicktime Movie	mov - theora - wma1	√			
Quicktime Movie	mov - theora - wma2	√			
MPEG-4 file	mp4 - h264 - aac	√	√	√	
MPEG-4 file	mp4 - h264 - dolby_digital	√	√		√
MPEG-4 file	mp4 - h264 - mp2	√	√		√
MPEG-4 file	mp4 - h264 - mp3	√	√	√	√

File Format	Container - Video Codec - Audio Codec	Chrome	Firefox	Internet Explorer	Safari
MPEG-4 file	mp4 - h264 - opus	√			√
MPEG-4 file	mp4 - h264 - vorbis	√	√		√
MPEG-4 file	mp4 - mpeg4 - aac	Audio-only			√
MPEG-4 file	mp4 - mpeg4 - mp2	Audio-only	Audio-only		√
MPEG-4 file	mp4 - mpeg4 - mp3	Audio-only	Audio-only		√
MPEG-4 file	mp4 - mpeg4 - opus	Audio-only			√
MPEG-4 file	mp4 - mpeg4 - vorbis	Audio-only			√
MPEG-4 file	mp4 - vp9 - aac	√	√		
MPEG-4 file	mp4 - vp9 - dolby_digital	Audio-only	Audio-only		
MPEG-4 file	mp4 - vp9 - mp2	√	√		
MPEG-4 file	mp4 - vp9 - mp3	√	√		
MPEG-4 file	mp4 - vp9 - opus	√			
MPEG-4 file	mp4 - vp9 - vorbis	√	√		
Ogg Theora Opus	ogg – theora - opus	√	√		
Ogg Theora Vorbis	ogg – theora - vorbis	√	√		
Ogg VP8 Opus	ogg – vp8- opus	√	Audio-only		
Ogg VP8 Vorbis	ogg – vp8 - vorbis	√	Audio-only		

10 Workspaces

In Relativity, a workspace provides a secure data repository for documents used in cases or for applications developed with dynamic objects. You can store all types of documents, such as productions, witness testimony, and so on, in a workspace to facilitate searching, organizing, and categorizing content. In addition, you can use granular security settings to grant or deny permissions to specific content stored in the workspace.

At the workspace level, you can also define views, layouts, fields, and choices. These features streamline workflows, as well as simplify the processes for organizing and categorizing content. Views support filtering on item lists, while layouts, fields, and choices are used for categorizing documents.

Relativity Framework
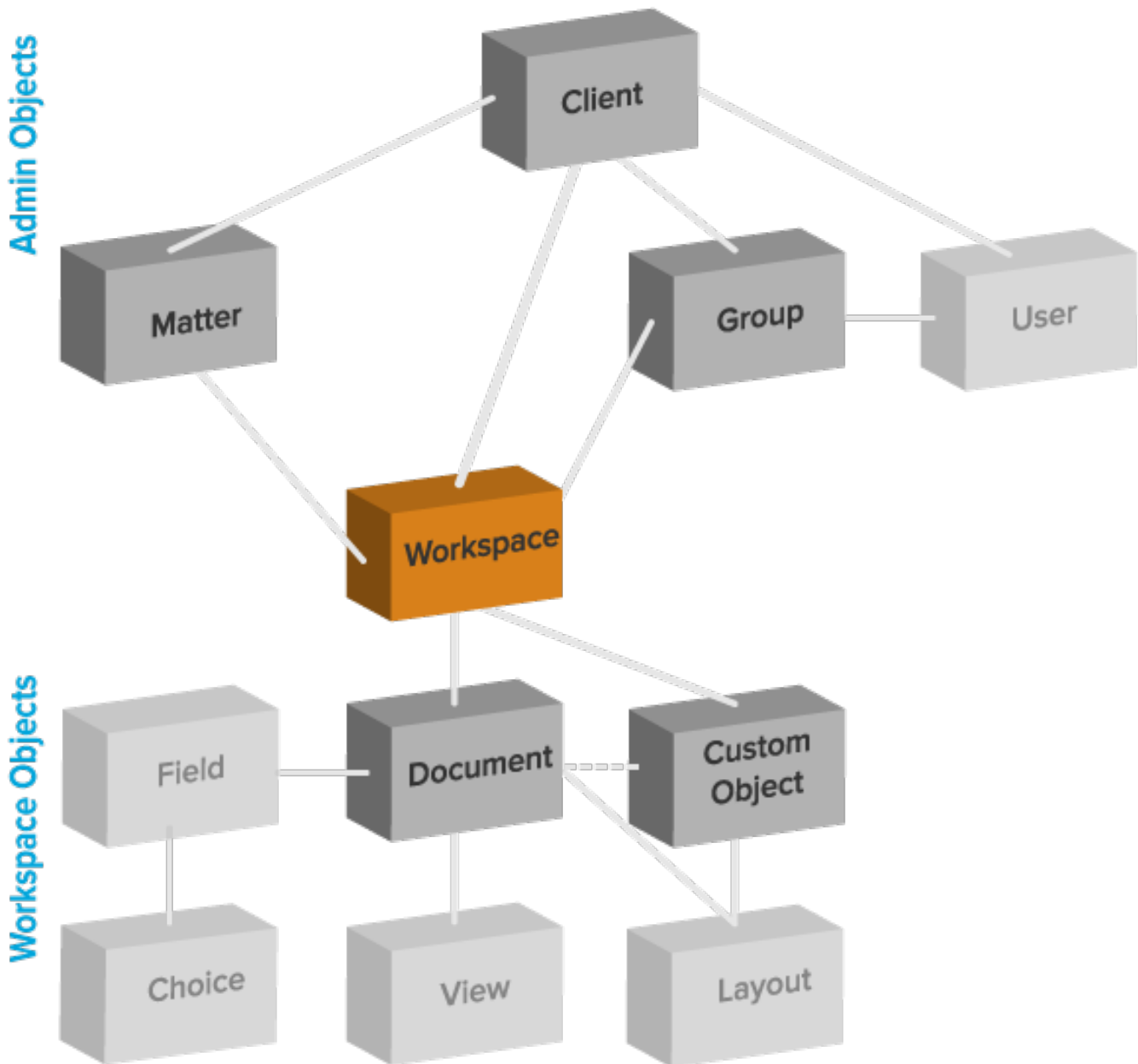
Also see these related workflows:
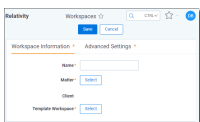
- **Client**—the name of this workspace's client object. This field is populates when you select a matter.

10.1 Viewing workspace details

On the Workspace Details tab, Relativity displays read-only workspace fields, history information, Relativity Utilities console, Production Restrictions, and the Workspace Admin Group field. You can update the Production Restrictions field when you edit a workspace. See Workspaces on page 142.
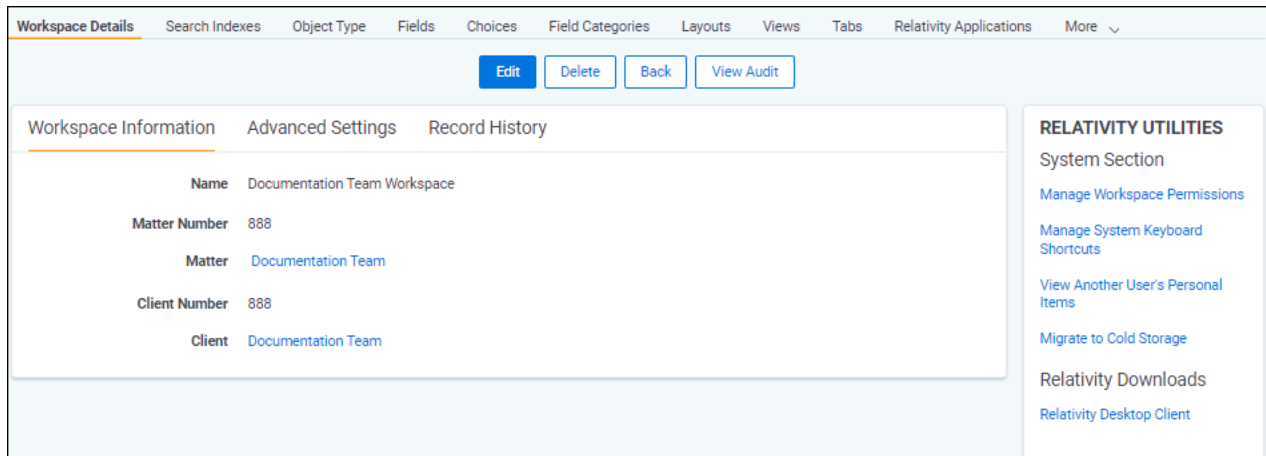
Note: Once a workspace is created, only System Administrators and Client Domain Administrators can make updates to the Matter object. Even users with full permissions for Matters and Clients will not have the ability to modify this object unless they are System Administrators or Client Domain Administrators.

10.1.1 Relativity Downloads

In the Relativity Downloads section, click any link to download the corresponding component.

- **Viewer Installation Kit**—download a standalone utility containing executable files used to install the viewer software.

- **Relativity Desktop Client**—downloads an executable file called **Relativity.Desktop.Client.Setup.exe**, which is used to install the Relativity Desktop Client (RDC). You can use this executable file on both 32-bit and 64-bit operating systems.

10.1.2 Re-run event handlers

The console includes the following button for rerunning event handlers:

- **Re-run Event Handlers**—executes Post Workspace Create event handlers that failed to complete properly. The Workspace Details page displays this button and an error message at the top of the page only when Post Workspace Create event handlers have failed. If the Post Workspace Create event handlers continue to fail, contact Customer Support via the Community site.

  Note: For additional information, see Post Workspace Create event handlers on the Relativity 2023 Developers site.For additional information, see Post Workspace Create event handlers on the Relativity Developers site.

10.2 Workspace admin group

A system admin can assign any group in Relativity to have full admin rights over a particular workspace. A workspace admin has full control over all objects within the workspace, but members of the group do not have the script

permissions available only to system admins.

Use the following steps to set a designate a workspace admin group:

1. Click **Edit** on the **Workspace Details** tab.

2. Click ![...] in the **Workspace Admin Group** field.

3. Click the radio button next to the group you want to set as the workspace admin group.

4. Click **Ok**.

Note: You can only designate one group per workspace as a workspace admin group.

10.3 Workspace navigation

The workspace has several key areas that are important to understand as a Relativity user.

- Review Interface quick reference

10.3.1 Browser panel

The browser is located on the left side of the workspace. Depending on your permissions, you may not see the browser. If you don't have a browser in your workspace, you can skip this section.

If you can see the browser, it may contain the following options for browsing through your documents:

- Folders

- Field Tree

- Saved Searches

- Clusters

No matter which of these options you use, there are several display options you can use to customize your workspace.
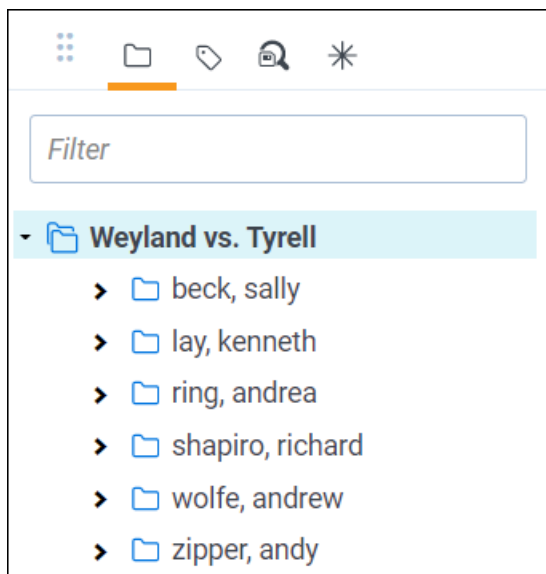
The browser opens by default. Hide or show the browser by using the arrow icon in the upper left of the browser.

Clicking ![icon] closes the browser. Reopen the browser by clicking ![icon]. You can also resize the browser by hovering over

the line separating the panel from the other panel or item list until the line is highlighted. You may then click and drag the line to the desired dimensions.

10.3.1.1 Browser options

The browser menu is located directly below the browser. Click on one of the menu's options to display that mode of the browser:

Icon	Name	Description
🗀	Folder browser	Navigate the folder hierarchy for your workspace
🏷	Field Tree browser	Browse your documents according to how they were coded or grouped
🔍	Saved Searches browser	Create a new search, or browse previously saved searches.See Saved Search in the Searching Guide.
✳	Clusters browser	Browse your workspace clusters, which are groupings of conceptually correlated documents. See Clustering in the Analytics Guide. You must have Analytics to use the cluster browser and define clusters in your workspace. See the Analytics Guide.

Folder browser

Click on the folder icon to navigate the folder hierarchy for your workspace. The folder structure is set when documents are imported. It can be based on the document's source, or according to a folder structure set by your Relativity administrator. Clicking on a folder displays that folder's documents in the item list.

Considerations

- Please be aware that folder names in Relativity workspaces are subject to a character limit. The maximum allowed length for folder names is 200 characters. While our system allows you to input names up to 255 characters, any name exceeding the 200-character limit will be automatically truncated. We recommend keeping folder names concise and under 200 characters to ensure they remain intact and fully visible in your workspace. If you anticipate the need for longer folder names, consider using abbreviations or adopting a naming convention to convey necessary information within the character limit.

- To ensure stable performance, we recommend creating no more than 250,000 folders in a workspace and having 15 sub-folders or less within each folder.

A folder often has multiple subfolders. You can view the subfolders with the expand ❯ button to the left of the desired folder. Once the subfolders expand, you can use the collapse ⌄ button to collapse them back into their root folder.

To change the folder scope (Only this folder or This folder and subfolders), click the arrow icon to the left of the Folder browser, and then select either **This folder and subfolders** or **Only this folder** from the drop-down list.
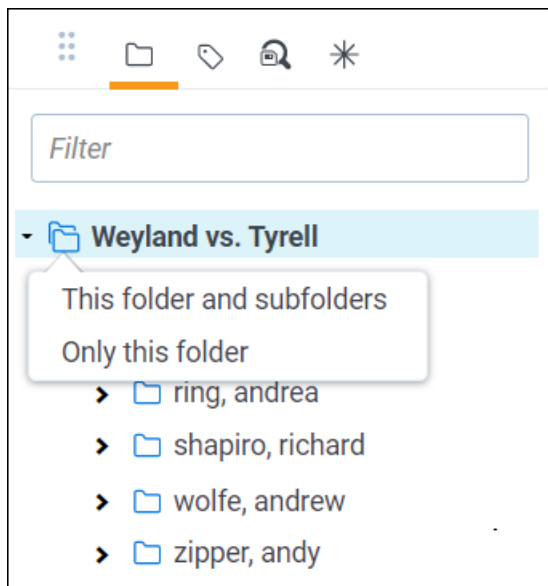
Field tree browser

Clicking on the field tree icon displays the field tree in the browser. Selected single- and multiple-choice list fields and their choices appear in a tree structure.
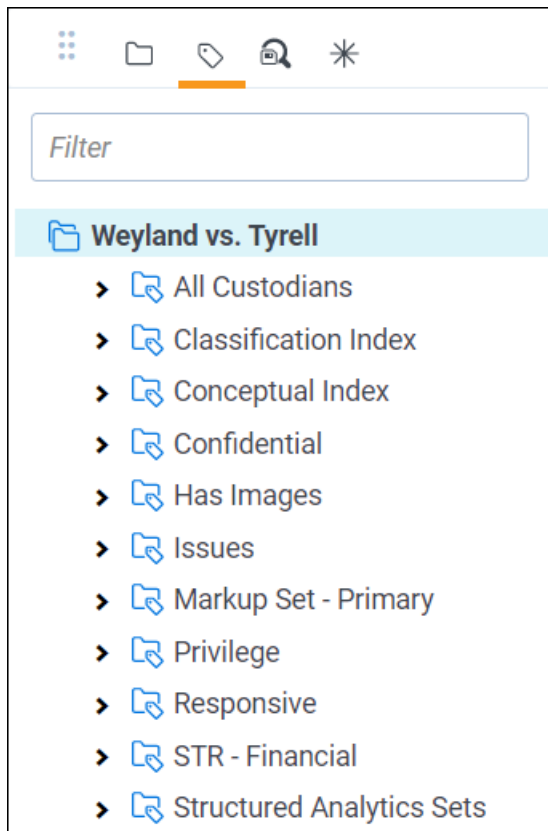
Each single and multiple-choice field has its own choice folder in the field tree. The field's choices appear as subfolders. Each field also has a [Not Set] choice, which displays null values for the field.

You can click on a choice in the field tree to display all the documents in the item list manager that have the selected choice value AND meet the criteria of the active view. In the item list, click this icon to send a link to the documents currently displayed in it.

Relativity®

Sending email links to choices

You can send an email message with a link to a choice, a choice folder, or the item list that appears when the field tree browser is open. In the field tree browser, right-click on a choice (or a choice folder) to display the **E-mail Link** option. Click this option on a choice to open an email message containing a link to it.
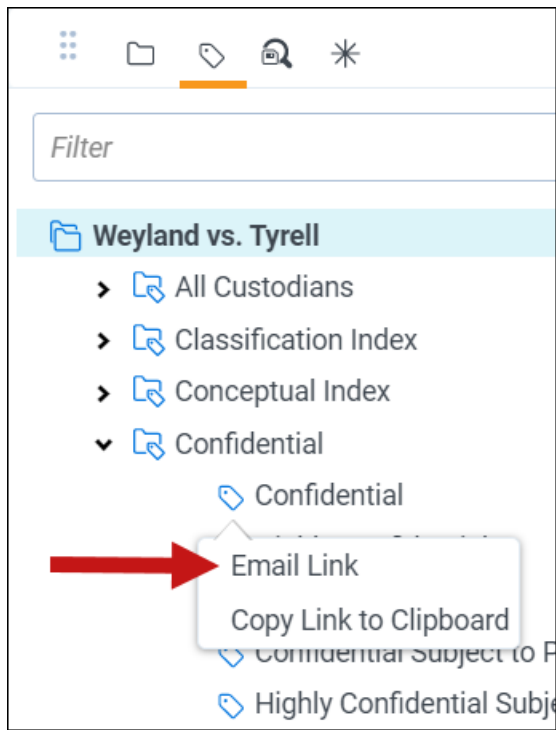
The subject line of the email message pre-populates with the following text: "Review - <Workspace Name> - <Choice Name: Value>." When the recipient clicks on the link, the documents associated with the choice appear in the item list manager. Relativity displays a permissions denied message if the recipient clicks the link but doesn't have access rights on the field associated with the choice.

Note: If you send an email link to a choice folder, the subject line displays the folder name instead of the choice name and the value. The item list manager displays all documents associated with the choices in the folder. Recipients must have access rights to fields associated with the choice folder.

10.3.2 View bar

The view bar consists of the following elements:

(Click to expand)

- **Show/Hide Browser Panel** - Click to show or hide the browser panel.

- **Show/Hide Search Panel** - Click to show or hide the search panel.

- **Show/Hide Document Preview Panel** - If the **EnableDocumentPreview** instance setting is set to True, click to display a panel which allows you to view documents before launching the Viewer. For more information, see Document Preview Panel.

- **Show current path** - view the current folder browser location for the displayed document list.

- **Views drop-down menu** - select a view.

  - **Edit view icon** ✎ - edit a view that displays within the view drop-down menu. This will only be present if you have permission to edit the view. If it's not present, contact your Relativity administrator to edit the current view.

  - **New view icon** ⊕ New View - create a new view from within the view drop-down menu. This will only be present if you have permission to add a new view. If it is not present, contact your Relativity administrator to add a view.

- **Include Related Items drop-down menu** - returns documents related to the documents currently in the view. The options vary by workspace, but may include email family groups, duplicates, or similar documents. Learn more about related items in the Related items card on page 118 section of this document.

- **Add Widget** - add a custom widget to your document list dashboard (e.g., pivot chart, list, grid, or cluster visualization).

- **Dashboard drop-down** - select a custom dashboard to view in your document list. See Dashboards in the Navigation section of the Admin Guide for more information.

- **Export drop-down button** - you can select export your dashboard widgets to an editable Excel document. See Dashboards in the Admin Guide for more information.

- **Sampling button** ⊞ - If you have proper permissions, clicking the Sampling button lets you create random sample sets from the document list using three different methodologies from the pop-up menu that appears.

For more information, see the Views chapter of the Admin guide.

Note: The drop-down menu that determined the folder scope has been removed from the view bar and repositioned in the folder browser. To use this new control, see Changing folder scope.

10.3.3 Document preview panel

The Document preview panel allows you to view documents in the document list before launching the Viewer. It also allows you to filter the list and quickly view documents in the results which makes the process of finding documents more efficient. You can view the native, images, production images, and text of documents in the Document preview panel, as well as view and navigate through highlight hits for any previously created persistent highlight sets. Unlike the Viewer, you cannot search or create ad hoc search terms in the Document preview panel however. Additionally, searching for terms in the document list will not create highlights in a document you are viewing in the Document preview panel.

To access the Document preview panel, the **EnableDocumentPreview** instance setting should be set to True. The Show Document Preview Panel icon 👁 will then display in the View bar. Additionally, users will need to have the **Document Preview** permission in Other Settings provided to a group they are in.

Note: The Document preview panel does not support viewing hidden content, creating or modifying markups, or editing coding decisions. Please open the document in the Viewer to perform these tasks.

10.3.3.1 Navigating the Document Preview Panel

The Document preview panel can be re-sized at any time by clicking and on the edge of the panel and dragging your cursor to the desired sizing.

The Document preview panel can be moved from the right or left side of the document list to the other side as well. To move the preview panel, click in the upper-left corner and drag the window to the blue strip on the other side of the screen.

The following options are available in the Document preview panel:

- **Show/Hide Persistent Highlight Pane** - displays or hides a panel containing any persistent highlight sets in the workspace. See Persistent highlight sets on page 42 for more information. Only terms in the sets that are in

the current document will display in the pane.

Additionally, you can control which highlights display in the current document by clicking on either the persistent set to only display highlights from that set or you can click on a specific term to only see that term highlighted in the document.
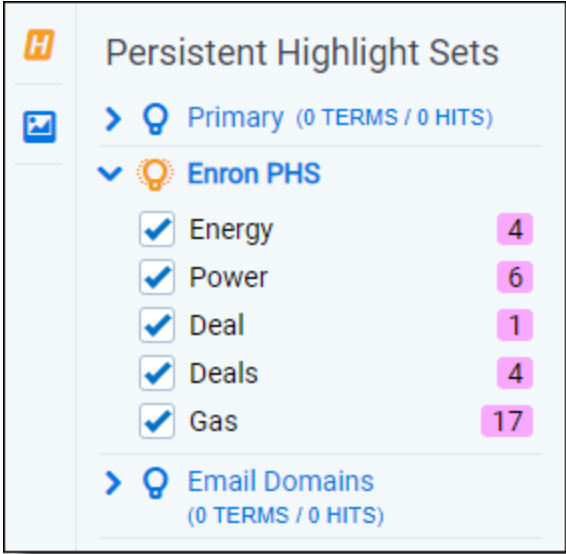
- **Document Preview Panel Mode** - click the name of the mode in which you would like to view the document. Mode names that are displayed in light blue indicate that the document is available for viewing in that mode. If a name appears in a black font and italics, that mode is not available for viewing in the current document.
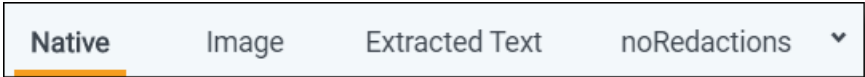
The mode that is currently open will display in a darker blue with an underline underneath the name.

- **Markup set** - displays the active markup set in a drop-down menu. Choose a markup set from the drop-down menu to make a different set active. This menu only appears when viewing a document in Image mode of the Document preview panel.

- **Page navigator** - use any of the following options to help you navigate the pages in the document you are previewing:

Option	Description
⏮	Click to move to the first page in the document.
◀	Click to move to the previous page in the document.
▶	Click to move to the next page in the document.
⏭	Click to move the last page in the document.

10.3.4 Item list

The item list manager consists of the item list as well as navigational and other controls for working with the list of items.

Icon	Description
▽ Show / Hide Filters	Click the blue icon to show filters for columns in the item list. Click the orange icon to hide them.
▽⊗ Clear Filters	Click this icon to clear any filters that have been applied to the item list.
↤↦ Reset column sizes	To return to the original settings for the columns, click the Reset Column Sizes icon.
⊥ Turn Grid Style On / Off	Click the blue icon to turn grid style on. This shrinks the row padding and alternates row shading to make your data more compact and easier to read. Click the orange icon to turn grid style off.
1 - 100 of 100,002 100 ⌄ per page |< < > >|	Use these navigational controls to navigate the pages in the item list.

The fields that appear in the item list are based on the selected view, which is editable. A view can also be edited to re-arrange the order that the columns display. Contact your Relativity administrator to change the fields in your view.

To change a column's size, hover over the white line at the edge of the column header. A double arrow appears, indicating that you can move the column. Drag it in either direction to adjust the column width. The other columns on the page automatically adjust to fill the rest of the window. Column data can be cut off. If you wish to return to the original settings click the Reset Column Sizes icon ↤↦.

(Click to expand)

10.3.4.1 Saving a search from the Documents tab

You can save the conditions you've currently set up for the item list as a new search using the ⬚ Save search icon located next to the mass operations bar at the bottom of the item list.

10.3.4.2 Previewing a document

Note that if you hover your mouse pointer over a record's file icon, you can click to open a pop-up viewer showing the record.

Note: If your item list doesn't contain the file icon, contact your Relativity administrator to add it.

10.3.4.3 Sorting

You can use any field in the view to sort the entire searching set – the number of documents indicated in the bottom right.

Click any field heading once to sort the documents in that field in ascending order, alphabetically. A down arrow appears next to the heading name, as in the Responsive field below. Click a second time to sort the documents in descending order, alphabetically. An up arrow appears. Clicking the field name a third time clears the sort and returns the field to its original order.

If you're not able to sort a particular field, contact your administrator to make sure the field has the Sort option set to Yes.

10.3.5 Document set information bar

If you are using the new UI, the document set information bar no longer displays the bottom of your screen. In the new user interface, you can now browse your entire returned document set using the item list or the Review Interface without having to incrementally add more documents.The maximum number of documents you can load in the Review Interface can be changed using the FluidReviewQueueSize instance setting.

10.4 Commonly-used dashboards

This topic provides recommendations for the fields to group by and pivot on to create some commonly used dashboards in your case life cycle.

With these dashboards, you and your case team will be better equipped to explore and prioritize your review, identify patterns and trends across custodians, and develop better review strategies with real-time insight.
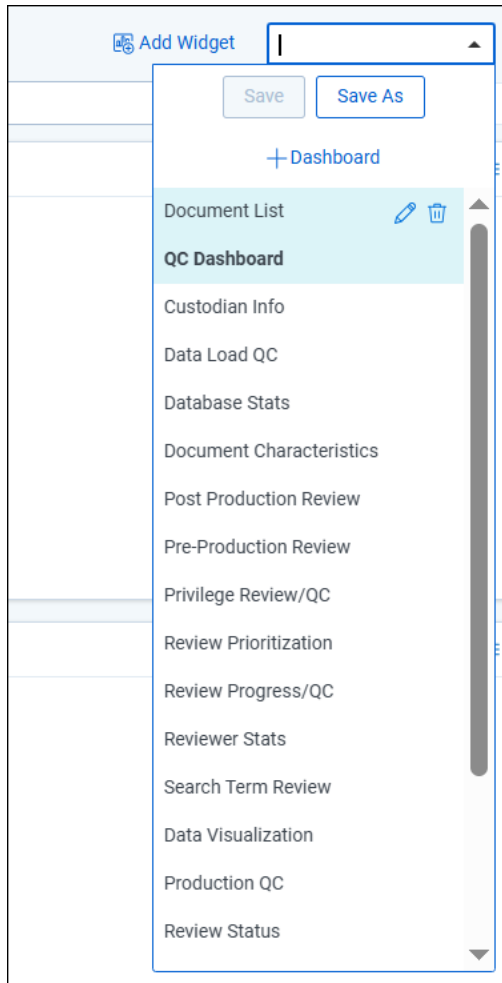

Use the examples described below to generate ideas for dashboards you may want to create in your cases.

Note the following:

- The fields described here may differ in name than what you see in your workspace.

- When adding a widget, you cannot select fields that have not been enabled for pivot on or group by; you must manually enable those fields in order to select them. If those fields are part of a locked application, you must unlock it in order to edit them.

- A widget will not render if the included fields do not contain any data. For example, if you attempt to create an STR-based dashboard without having run STR on key terms, you will see the following:
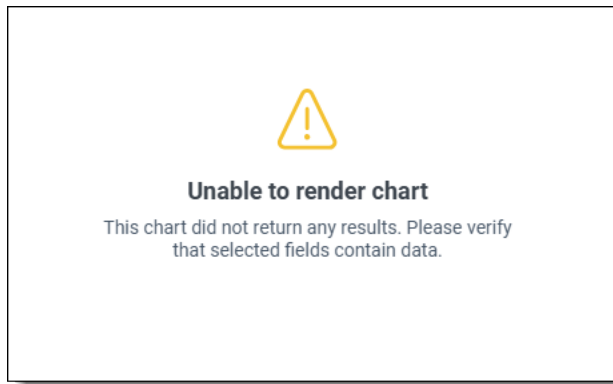
10.4.1 Communicators

If you've run name normalization and want to create a Communicators dashboard within the Entities tab, group by and pivot on the following fields:
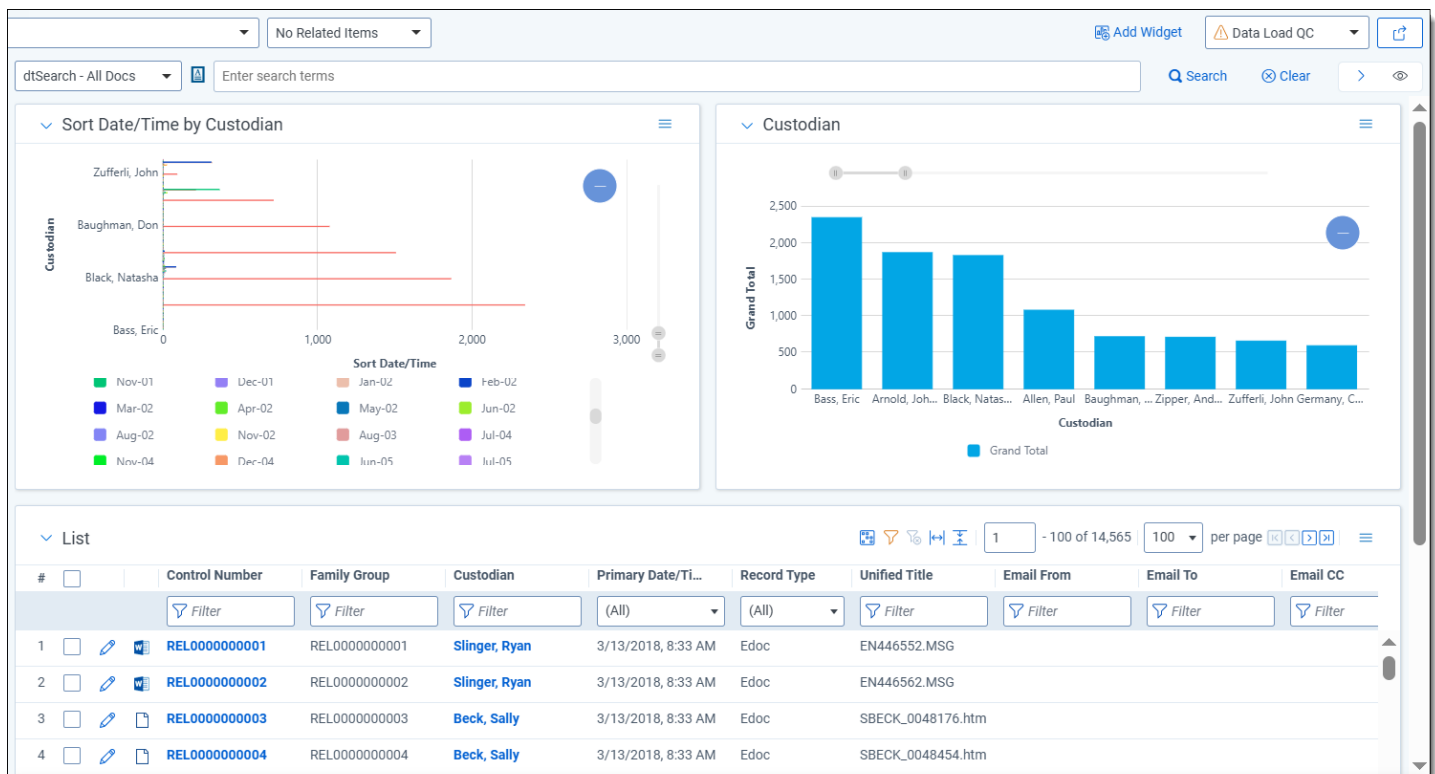
- Group by Aliases: Domain
- Group by Aliases
- Group by Classification
- Group by Entity To
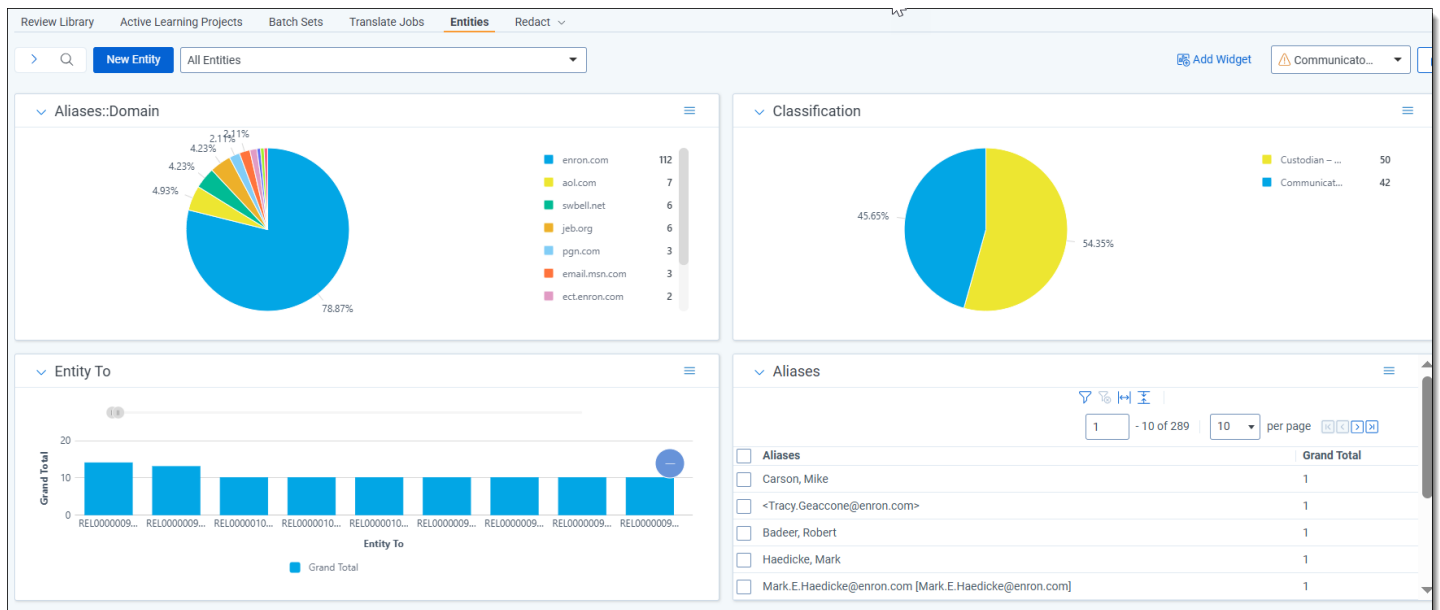
10.4.2 Data Load QC

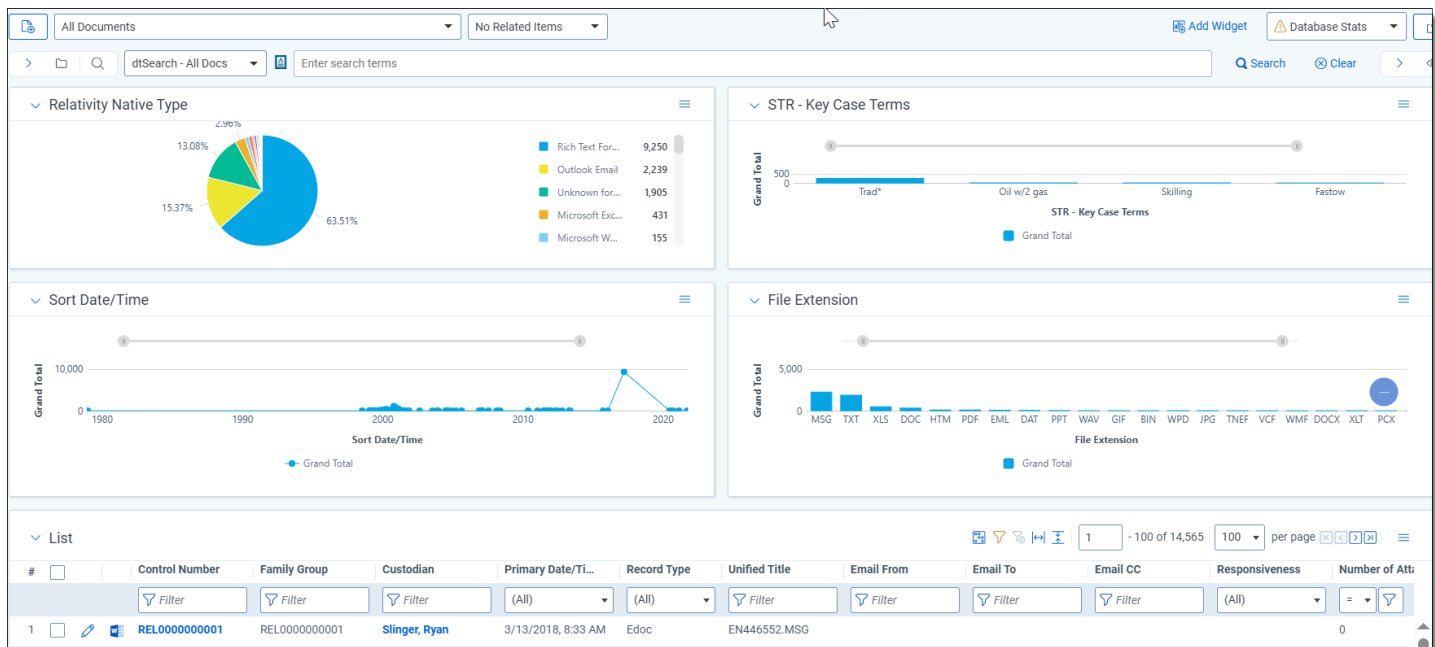To create the Data Load QC dashboard, group by and pivot on the following fields:

- Group by Custodian
- Group by Custodian and pivot on Sort Date (Year)

10.4.3 Database Stats

To create the Database Stats dashboard, group by and pivot on the following fields:

- Group by Native Type

- Group by Extension

- Group by Sort Date

- Group by Key Term STR

10.4.4 Document Characteristics

To create the Document Characteristics dashboard, group by and pivot on the following fields:

- Group by Unprocessable

- Group by Track Changes

- Group by Password Protected

- Group by File Type

- Group by Has Hidden Data - this widget is collapsed in the dashboard example below.

Note: You can collapse your widgets, as seen in Has Hidden Data below. If you save your dashboard with a widget collapsed, it will remain collapsed.
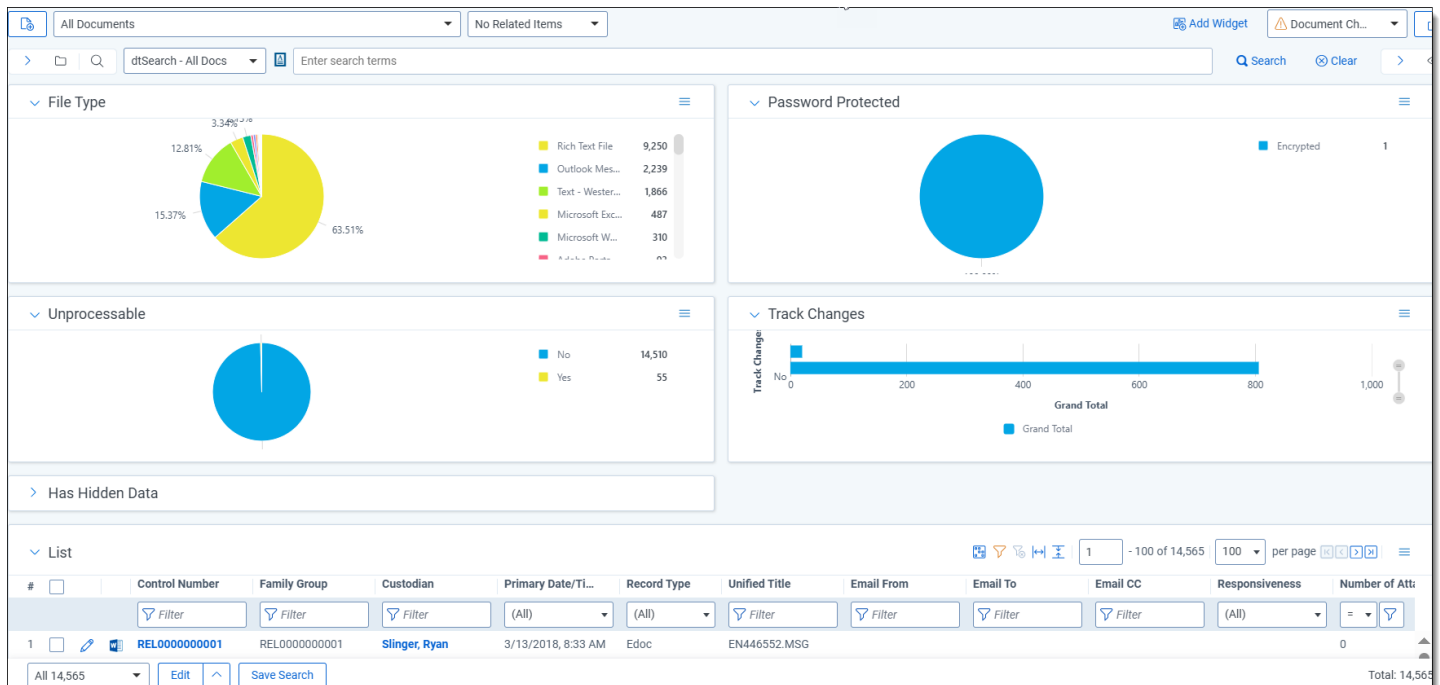
10.4.5 Review Prioritization

To create the Review Prioritization dashboard, group by and pivot on the following fields:
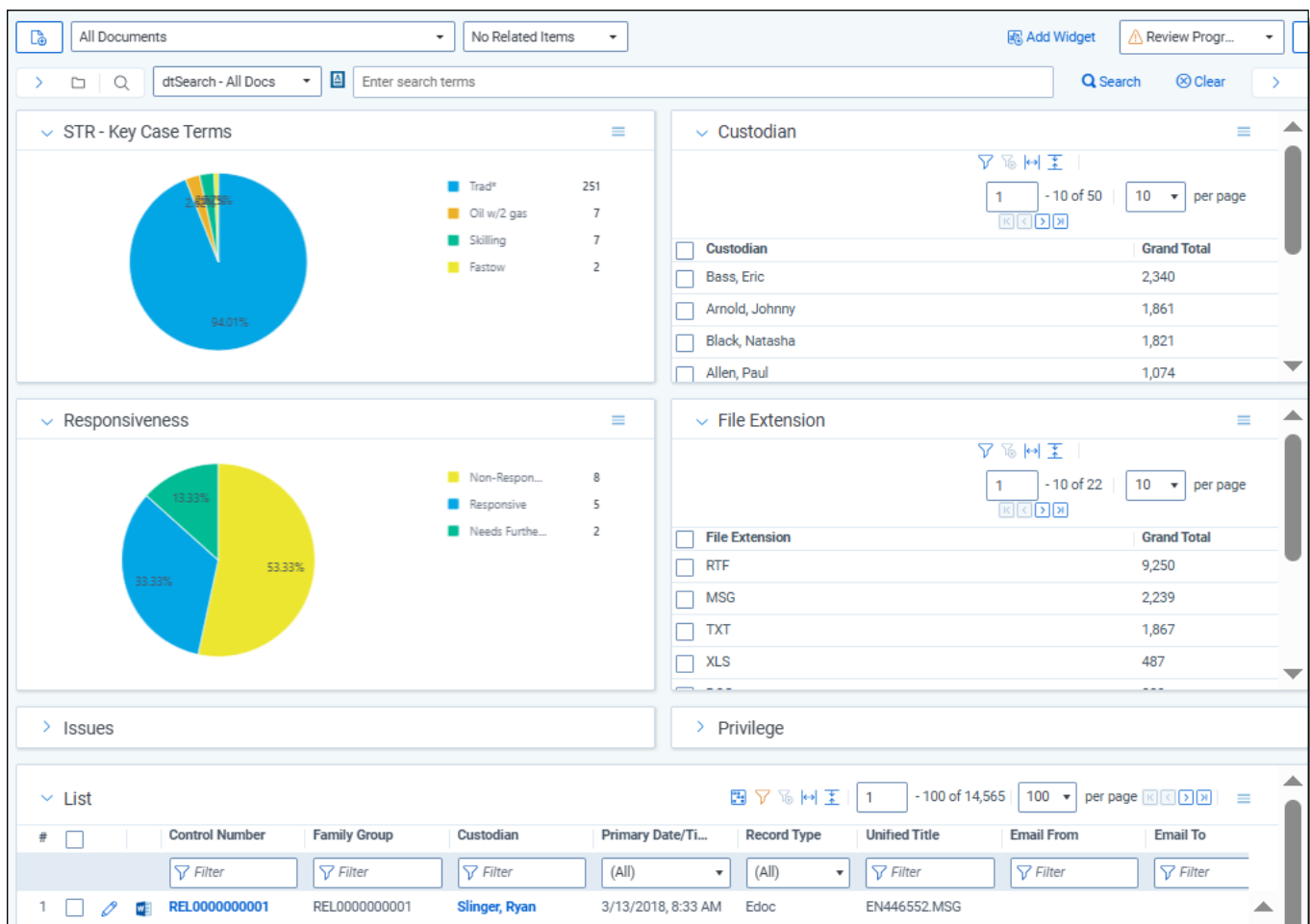
- Cluster Visualization Widget

- Group by Key Term STR
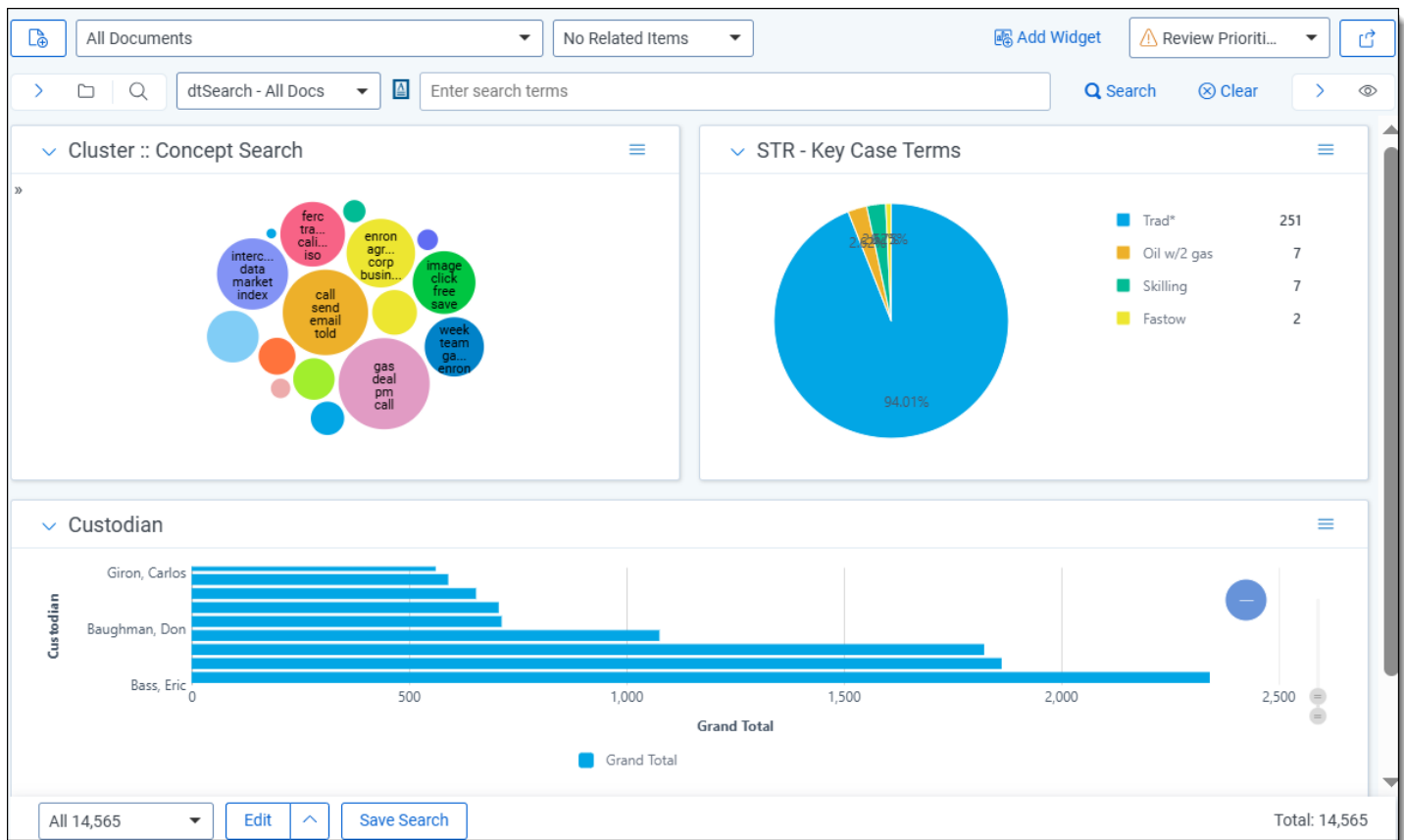
- Group by Custodian

10.4.6 Review Progress/QC

To create the Review Progress/QC dashboard, group by and pivot on the following fields:
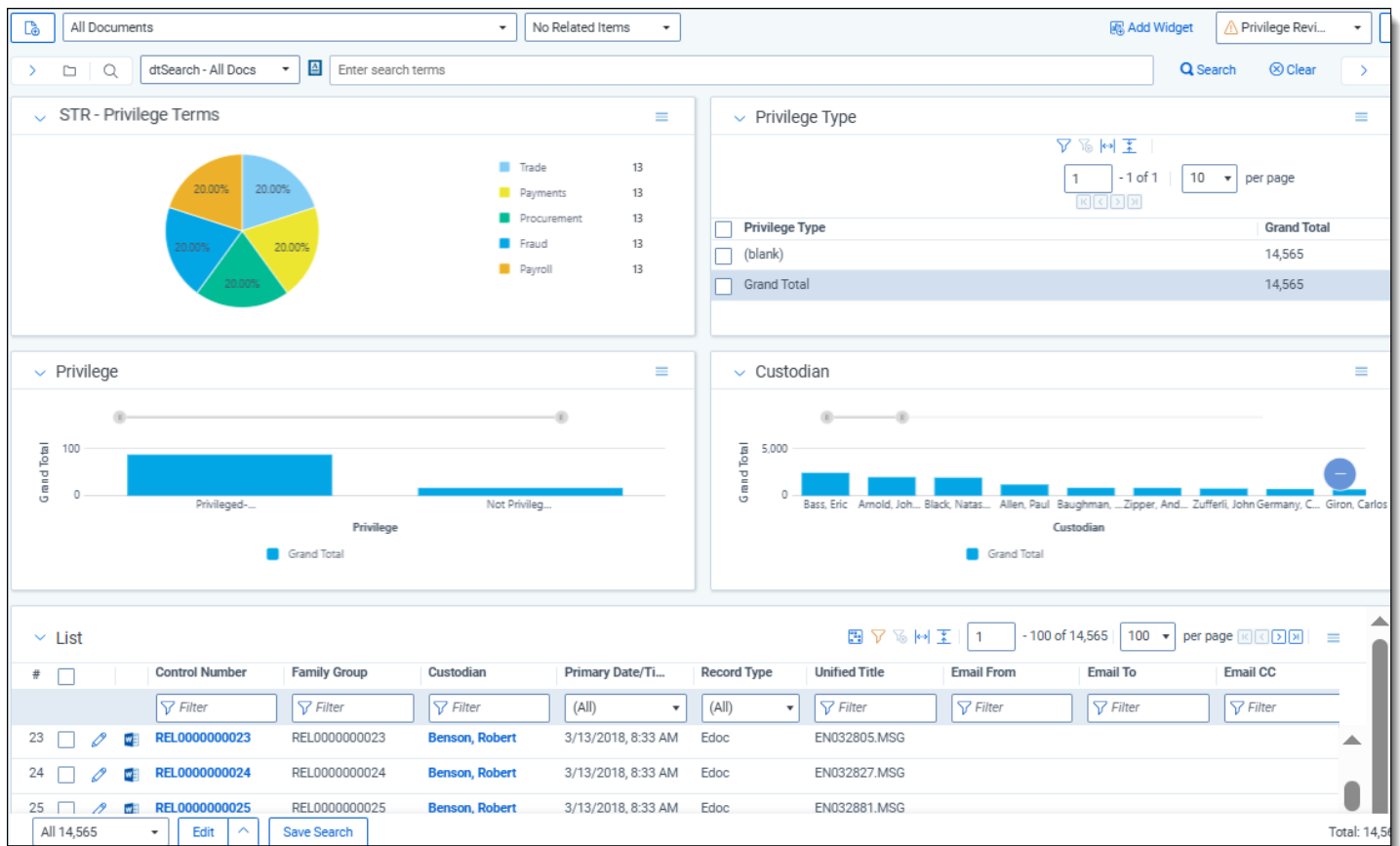
- Group by Responsive Designation

- Group by Privilege

- Group by Issues

- Group by Key Term STR

- Group by Custodian

- Group by File Extension

10.4.7 Privilege Review/QC

To create the Privilege Review/QC dashboard, group by and pivot on the following fields:
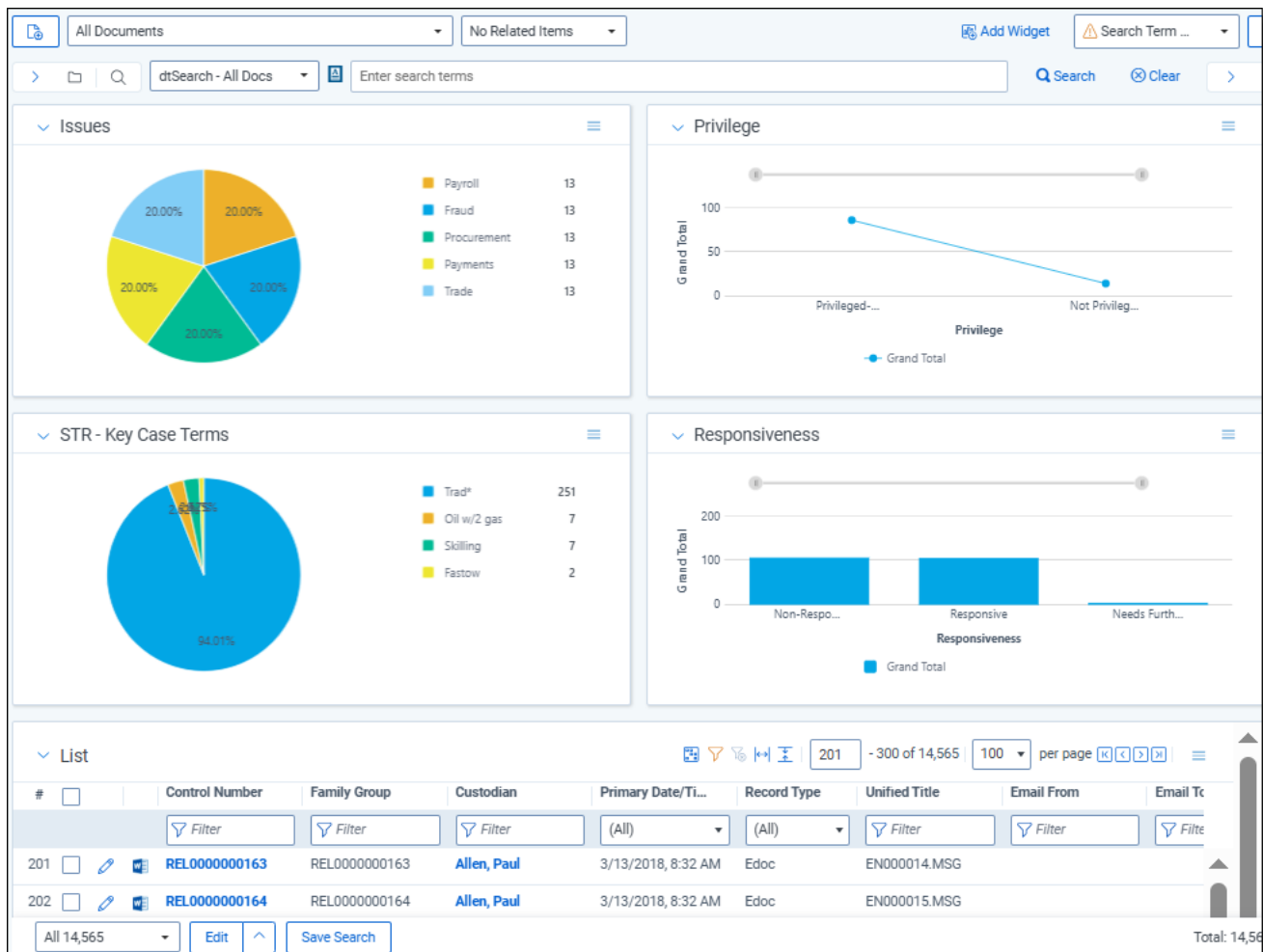
- Group by Privilege
- Group by Privilege Designation
- Group by Privilege Terms STR
- Group by Custodian

10.4.8 Search Term Review

To create the Search Term Review dashboard, group by and pivot on the following fields:

- Group by Responsive Designation

- Group by Key Term STR

- Group by Issue Coding STR

- Group by Issues

- Group by Privilege

- Group by Privilege Terms STR

10.4.9 Pre-Production QC

Note: The production fields in your environment may not be enabled for group by/pivot on, and you may be unable to manually enable them if the application is locked.

To create the Pre-Production QC dashboard, group by and pivot on the following fields:

- Group by Custodian
- Group by Responsive Designation
- Group by Privilege
- Group by Key Term STR
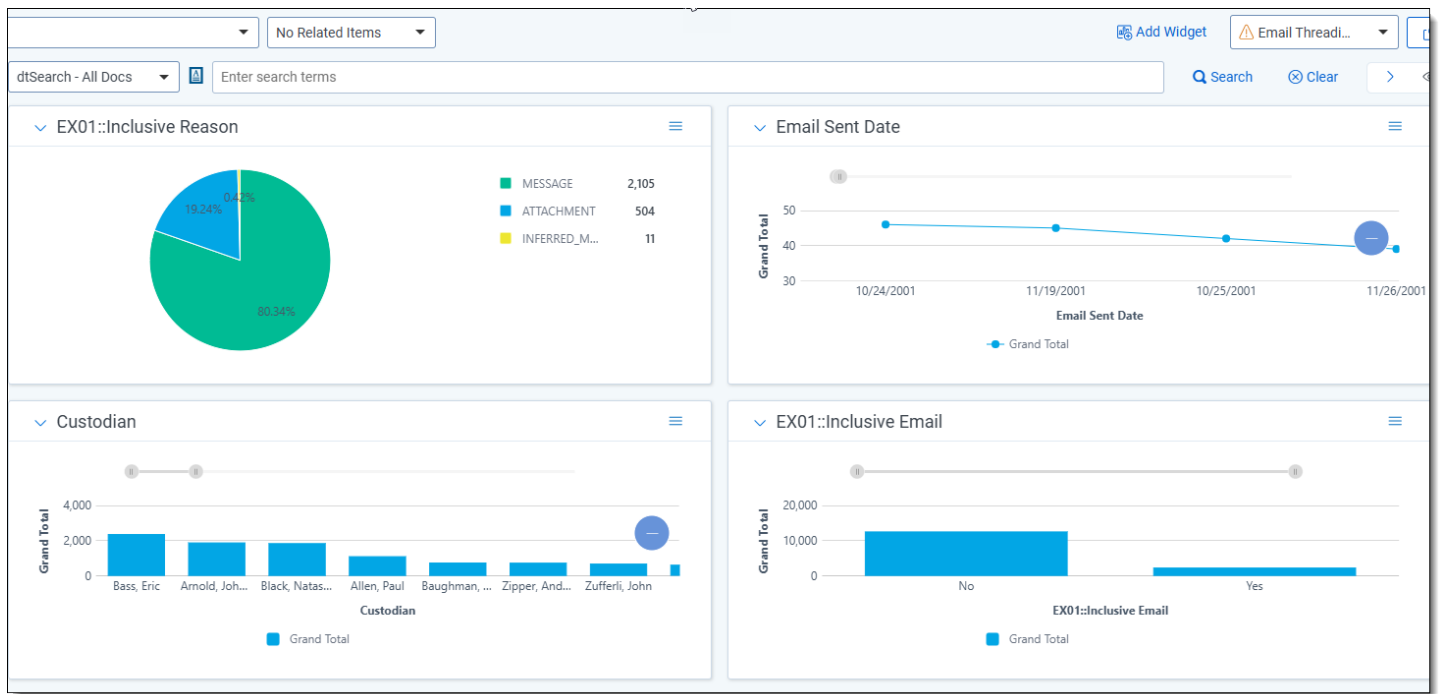- Group by Has Images
- Group by Issues
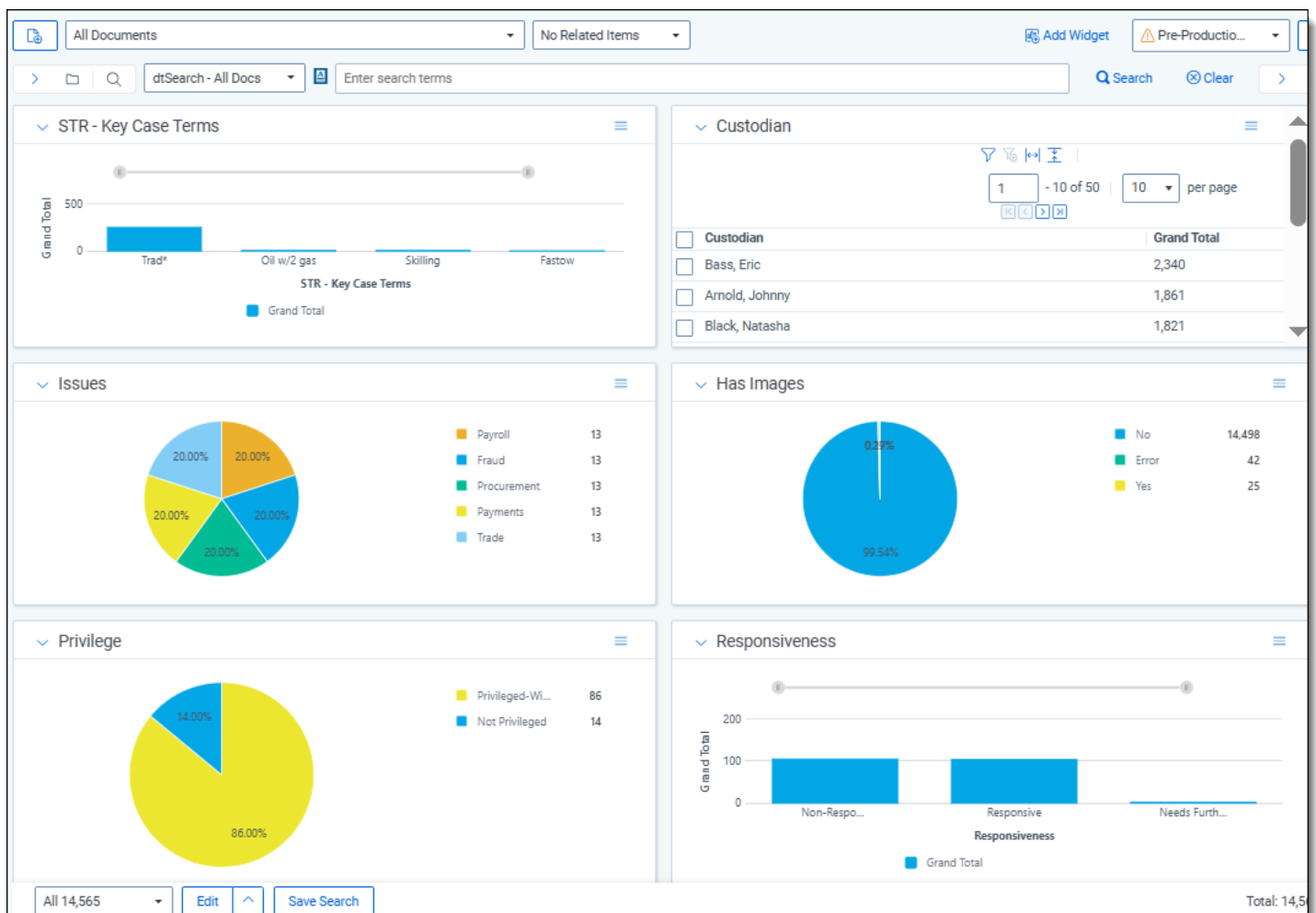
10.4.10 Email Threading

To create the Email Threading dashboard, group by and pivot on the following fields:

- Group by Inclusive Email
- Group by Inclusive Reason
- Group by Custodian
- Group by Date Sent (year)

Note: We recommend using your Email Threading view with this dashboard.
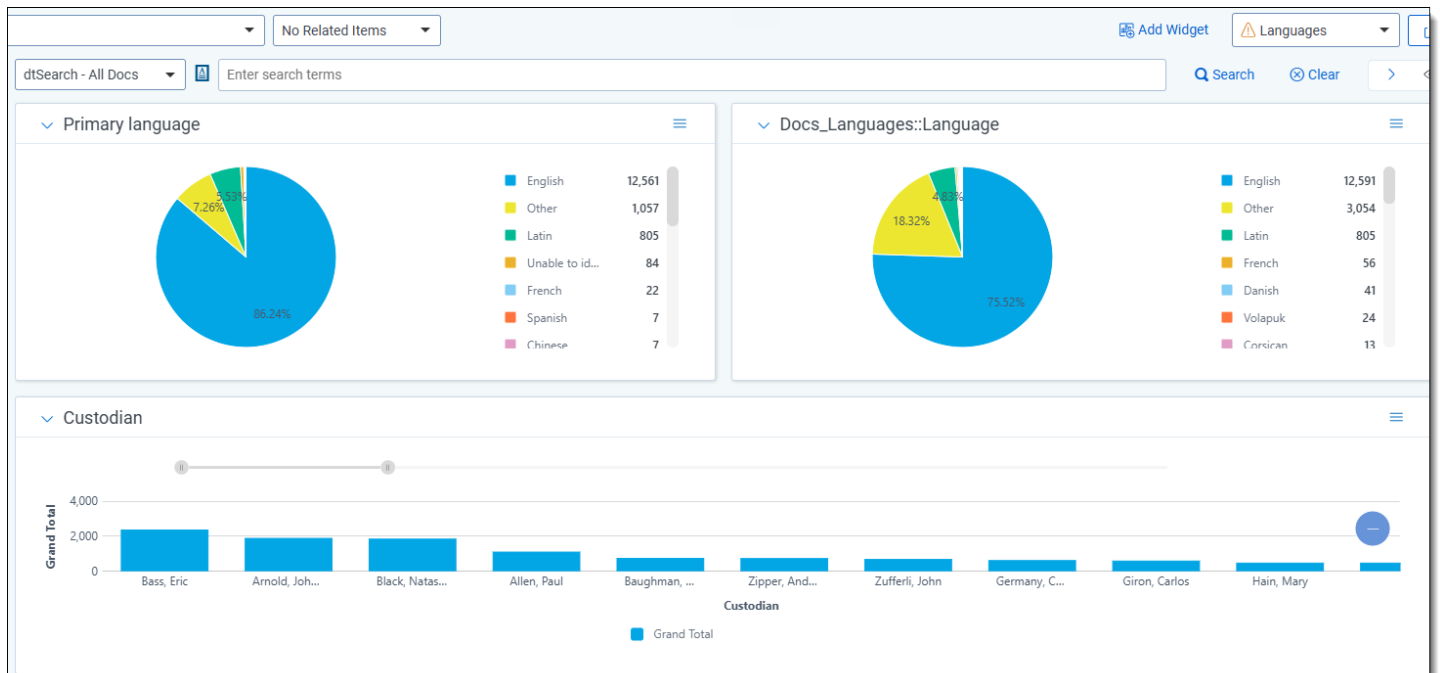
10.4.11 Language Identification

To create the Language Identification dashboard, group by and pivot on the following fields:

- Group by Primary Language

- Group by Docs_Languages::Language

- Group by Custodian

Note: We recommend using your Language Identification view with this dashboard.

10.4.12 Special considerations

- Create a default Document List dashboard (lowest order number) with only the item/document list, no additional widgets.

- You can only have one Cluster Visualization widget on a dashboard.

- You can create dashboards on other objects.

- Dashboards can be created in your template, so they carry over to your new workspaces. However, some dashboards, such as those with search term report widgets or cluster visualization, will need to be created in the individual workspace once you've created your clusters and/or STRs.

Proprietary Rights

This documentation ("**Documentation**") and the software to which it relates ("**Software**") belongs to Relativity ODA LLC and/or Relativity's third party software vendors. Relativity grants written license agreements which contain restrictions. All parties accessing the Documentation or Software must: respect proprietary rights of Relativity and third parties; comply with your organization's license agreement, including but not limited to license restrictions on use, copying, modifications, reverse engineering, and derivative products; and refrain from any misuse or misappropriation of this Documentation or Software in whole or in part. The Software and Documentation is protected by the **Copyright Act of 1976**, as amended, and the Software code is protected by the **Illinois Trade Secrets Act**. Violations can involve substantial civil liabilities, exemplary damages, and criminal penalties, including fines and possible imprisonment.