Relativity®

Transcripts application

October 30, 2024 | Version 24.0.315.10

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1 Transcripts application

The Transcripts application gives users the ability to upload, review, code, and annotate transcript files in Relativity.

Note: You can only view Transcripts using Review or the HTML Document Viewer.

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Uploading transcripts	When uploading transcripts, Relativity automatically creates folders named after the Deponent Name field. Transcripts are stored in these folders, along with any corresponding attachments. This topic includes: ■ Uploading transcripts with Simple File Upload ■ Mass importing transcripts with the Relativity Desktop Client ■ Editing the Transcripts Import Layout
Supported file types for the Transcripts application	This topic covers the load file requirements for each supported file type.
Annotating transcripts	When you open a transcript in the Viewer, you can add notes, designations, exhibits, and URLs to transcripts. This topic includes: ■ Adding notes, designations, exhibits, and URLs ■ Uploading a CSV file containing designations ■ Working with Case Dynamics
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Printing transcripts	This topic covers how to print transcripts from the Viewer.
Transcripts tab	The Transcripts tab contains individual tabs with views for Notes, Exhibits, URLs, Comments, Designations, and Designation types. This topic defines the fields on each tab.

2 Installing the Transcripts application

The latest version of the Transcripts application can be found in the Application Library and is part of the upgrade process.

This application is also available for download in the Relativity Community. Search for the name of the file, and then select the **Files** tab in the search results.

> **Note:** You must have valid Relativity Community credentials in order to download any Community file linked to the documentation site. You'll need to enter those credentials on the Community login screen if you're not already logged in. If you're already logged in to the Community at the time you click a link, the file is automatically downloaded in the bottom left corner of your screen. If you get an error message stating "URL No Longer Exists" after clicking a Community link, it may be due to a single sign-on error related to the SAML Assertion Validator, and you should contact your IT department.

2.1 Transcripts application compatibility matrix

Transcripts application version	Relativity Server 2024	Relativity Server 2023
Transcripts application 24000.0.3	X	
Transcripts application 13.1.0		X

2.2 Installing the Transcripts application

In Relativity, confirm that you have the appropriate system admin permissions to install the application. For more information, see Installing applications.

To add the application to the Application Library:

1. On the **Applications & Scripts** tab, click the **Application Library** tab.

2. Click **Upload Application**.

3. Click **Select File**, navigate to and select the Transcripts rap file, and then click **Open**.

4. Click **Save**.

5. Click **Select** in the Workspaces Installed section to install the application on workspaces.
    1. In the column on the left, select the workspace(s) you want to install the application to.
    2. Use the single arrow between the columns to move the selected workspaces over to the column on the right.
    3. Click **Apply**.

6. Click **Save** to install the application to the selected workspaces.

2.3 Security permissions

You must configure certain permissions for proper functionality of the Transcripts application.

To configure the Transcripts application:

1. Navigate to the **Workspace Details** tab.

2. Click **Manage Workspace Permissions**.

3. Click **Edit Permissions** for a group on the Group Management tab. Or, click **Object Security** and select a group from the **Current Group** drop-down menu.

4. Enable the following security permissions:

Object Security	Tab Visibility	Other settings
■ **Document** - Add **Note:** The **Document - Add** permission enables users to upload both transcripts and other documents to Relativity. ■ **Transcripts - Designation** - View, Edit, Delete, Add ■ **Transcripts - Designation Reference** - View, Edit, Delete, Add ■ **Transcripts - Fact** - View, Edit, Delete, Add ■ **Transcripts - Interview Question** - View, Edit, Delete, Add ■ **Transcripts - Issue** - View, Edit, Delete, Add ■ **Transcripts - Link to document** - View, Edit, Delete, Add ■ **Transcripts - Link to Url** - View, Edit, Delete, Add ■ **Transcripts - Location** - View, Edit, Delete, Add ■ **Transcripts - Note** - View, Edit, Delete, Add ■ **Transcripts - Note** - Comment - View, Edit, Delete, Add ■ **Transcripts - Organization** - View, Edit, Delete, Add ■ **Transcripts - People** - View, Edit, Delete, Add ■ **Transcripts - Video Clip** - View, Edit, Delete, Add	■ Transcripts (parent) 　◦ Exhibits (child) 　◦ Designations (child) 　◦ Designations Type (child) 　◦ Notes (child) 　◦ Comments (child) 　◦ URL (child) 　◦ Video Clips (child)	■ Mass operations 　◦ Delete 　◦ Transcript Report ■ Admin Operations: Allow Import

2.4 Reviewer security permissions

A system administrator can assign the following permissions to reviewers so that they can only add and apply designations when annotating transcripts.

Object Security	Tab Visibility Other settings
■ **Transcripts - Designation** - View, Edit, Delete, Add ■ **Transcripts - Designation Reference** - View, Edit, Delete, Add ■ **Transcripts - Link to document** - View, Edit, Delete, Add ■ **Transcripts - Location** - View, Edit, Delete, Add	

3 Uploading transcripts

When uploading Transcripts, Relativity automatically creates folders named after the Deponent Name field. Transcripts are stored in these folders, along with any corresponding attachments. When exhibit folders are uploaded with a transcript, the naming convention includes an underscore (_). If there are no exhibits, an exhibit folder is not created.

3.1 Special considerations

Special considerations include:

- The Transcripts application supports transcript files up to 10GB. The upload can be a mix of transcript files, exhibits and video files.

- The Transcripts application does not support transcript files that contain footers. For example, the .txt transcript file below is not supported because it contains a footer.

  See Uploading transcripts.

- The Transcripts application does not support Transcript files that contain a word index before they are uploaded to Relativity. For example, the .txt transcript file below is not supported because it contains a word index.

  See Word index.

- Transcripts are ordered alphabetically in the document list. See below for example:
  - Exhibit 1
  - Exhibit 10

- Exhibit 11
- Exhibit 12
- Exhibit 2
- Exhibit 20
- Exhibit 21

- The Transcripts application doesn't support uploading a draft version of a transcript and then later replacing it with the final version of the transcript. You can import both transcripts to Relativity, but one will not override the other and annotations aren't carried over.

3.2 Upload a transcript from the Documents tab

Once uploaded, native files can be seen in the Native Viewer. All non-native files can be seen in the Extracted Text Viewer instead.

To upload a new transcript to a workspace from the **Documents** tab:

1. Navigate to the **Documents** tab.

2. Click the arrow on the right side of the Simple File Upload icon to open a drop-down menu, and then select **New Transcript**.
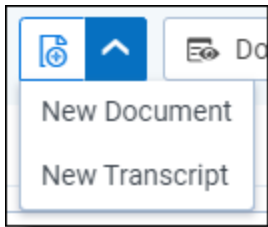
3. Click **Choose File** or drag and drop your file to upload. When the transcript imports successfully, a green check mark appears.

If you uploaded a bundle of files, Relativity extracts the transcript file and displays the extra files as exhibits. Supported bundle file types include .lef and .xmef. To ensure the files are uploaded, the Transcript file name and the file extension must be 200 characters or less.

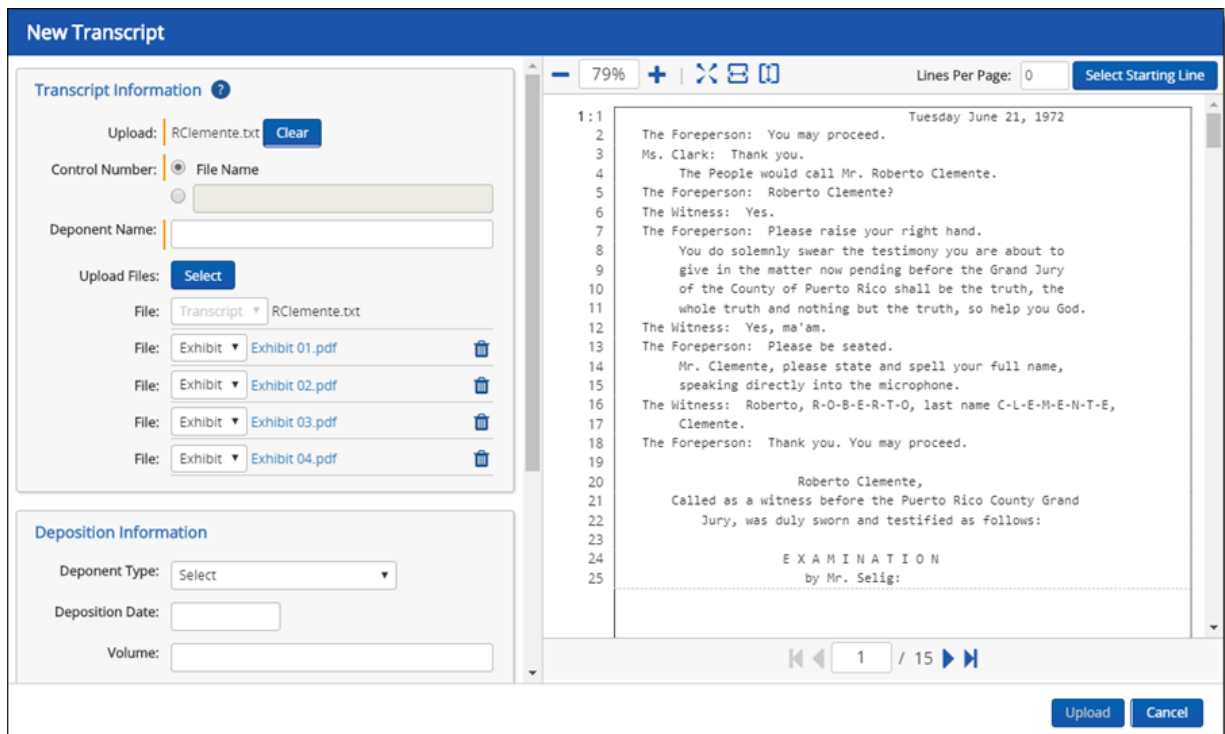Once they are uploaded, you can find the exhibits as document references in the transcripts layout. They will not have a page or line number unless they are directly linked to a page and line on the transcript. Existing links to exhibits in transcripts files will be visible in the Viewer once they are uploaded to Relativity.

4. Click **Select File** to upload exhibits. To upload and link additional exhibits to a transcript, use Simple File Upload and then link the exhibits using the Transcripts layout.

> **Note:** Only 20 exhibits can be linked to a transcript upon initial upload. By modifying the SFUMaxFilesToUpload instance setting, administrators can increase the number of files you can upload up to 100 files.
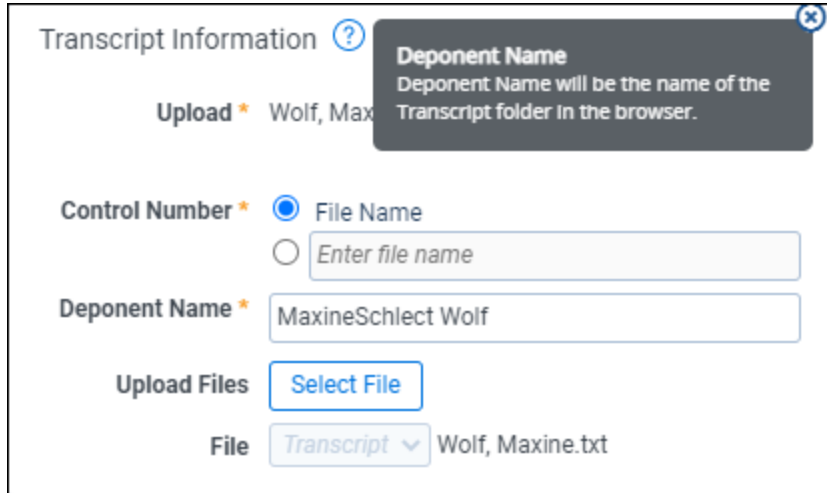
5. Fill out the fields:

- **Control Number** - choose the file name or a enter a control number.

- **Deponent Name** - enter the name of the deponent.

- **Upload Files** - click **Select** to choose which exhibit files you would like to add along with the transcript.

- **Deponent Type** - select Fact, Expert, or Character deponent.

- **Deposition Date** - enter the date of the transcript's creation.

- **Volume** - enter the volume of the transcript you are reviewing.

- **Status** - select Draft or Final.

- **Transcript Source** - select Hearing, Trial, Or Deposition.

- **Taking Attorney** - enter the name of the taking attorney.

- **Defending Attorney** - enter the name of the defending attorney.

- **Party** - select Plaintiff or Defendant.

- **Lines per page** - enter the number of lines per page reflected on original transcript file taken by the respective court reporter.

- **Comments** - add custom comments to the transcript being imported in this custom field.

6. (Optional) If you want to change the number of lines per page, type the number of lines per page that you want into the **Lines Per Page box** and then hit enter on your keyboard. Click **Reset** in the upper right corner to revert the number of lines per page.

7. (Optional) If you want the transcript to have a different starting line, click **Select Starting Line** and then click the line of the transcript that you want to be the first line. Click **Clear** in the upper right corner to revert the starting line.

8. Click **Upload**.

A tool tip indicates that the Deponent Name will be the name of the transcripts folder created.

3.2.1 Uploading a video of an interview

Transcripts load files often come with a video of the interview. The video can be played in the Viewer in sync with the text of the transcript.

> **Note:** You must import videos at the same time you are uploading transcripts or the video and transcript cannot sync.

To upload a video using a .txt file:

1. Click **New Transcript**. A pop-up appears.

2. Click **Choose File** or drag and drop your .txt file to upload.

3. Multiple attachments will appear uploaded along with the transcript. Make sure that you keep the .mp4 check box selected.

4. Fill out the relevant fields. See Uploading transcripts with Simple File Upload.

5. Click **Upload**.

To upload a video using a .mp4 file:

1. Click **New Transcript**. A pop-up appears.

2. Upload your transcript file.

3. Next to **Upload Files** click **Select.**

4. Navigate to your .mp4 file and upload it.

5. Fill out the relevant fields. See Uploading transcripts with Simple File Upload.

6. Click **Upload**.

Videos are not documents and are not stored in the document list in Relativity. Videos are stored as a file field within a transcript. To access a video, you will need to open it from the Viewer or find it in the folder browser. To distinguish videos from transcripts, videos will have an icon ( ) next to them.

To open the video player in the Viewer, click the video icon ( ) in the bottom, left side of the Viewer. To go directly to a specific line of the transcript in the video:

1. Hover your cursor over the desired line number.

2. Right-click and select **Go to video from this line**.
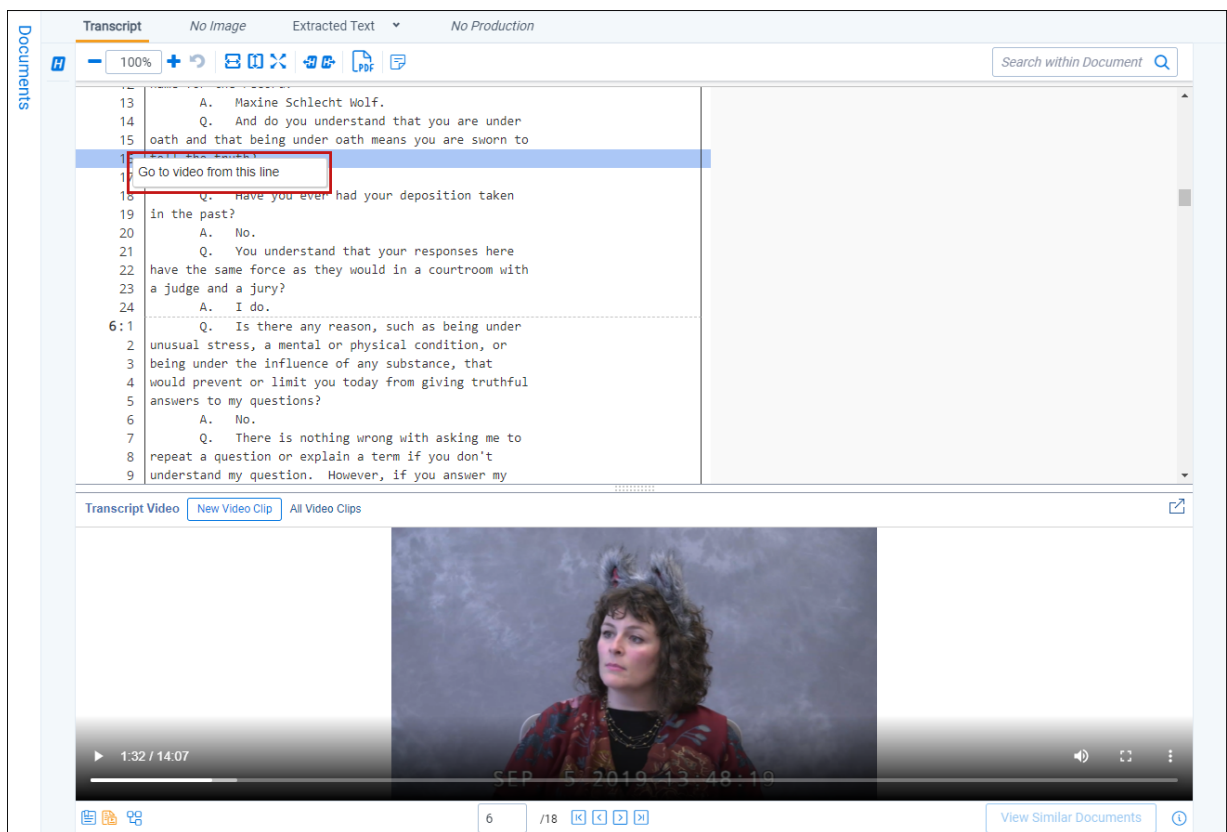
To give yourself more room to annotate the transcript, click , which will pop the video player out of the viewer. To pop the video player back in the viewer, click .
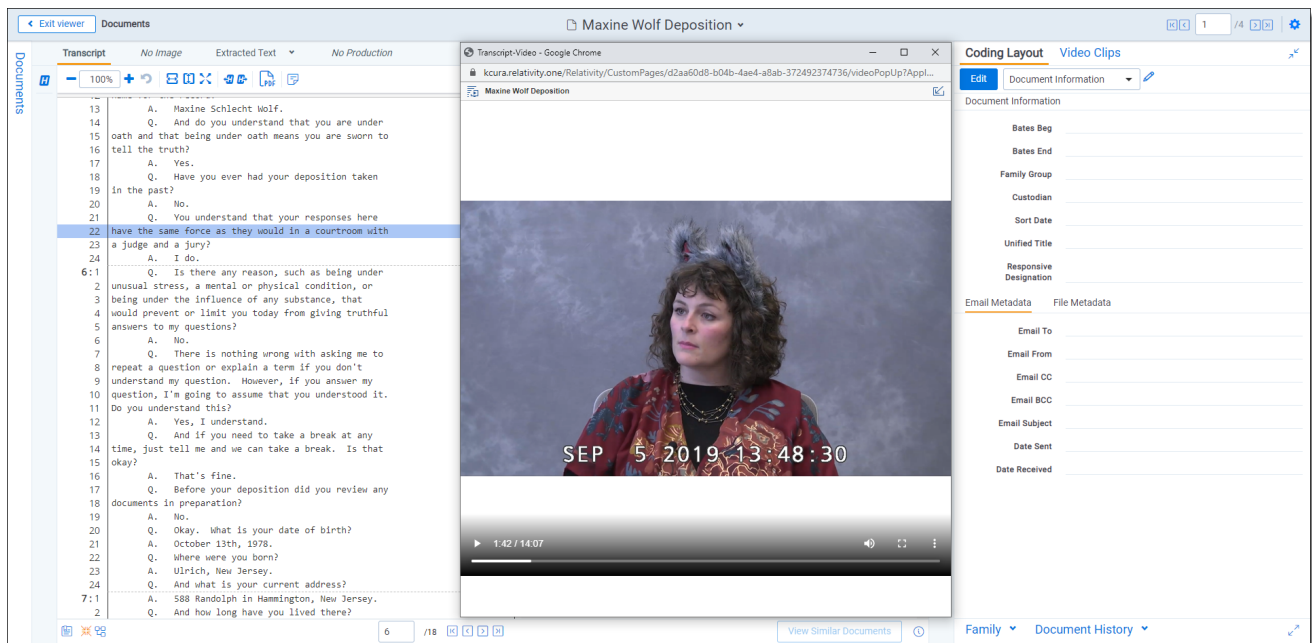
3.3 Mass importing transcripts with the Relativity Desktop Client

Since a transcript is a document file, you can mass import transcripts using the Relativity Desktop Client, specifically by selecting the appropriate Document object to import.
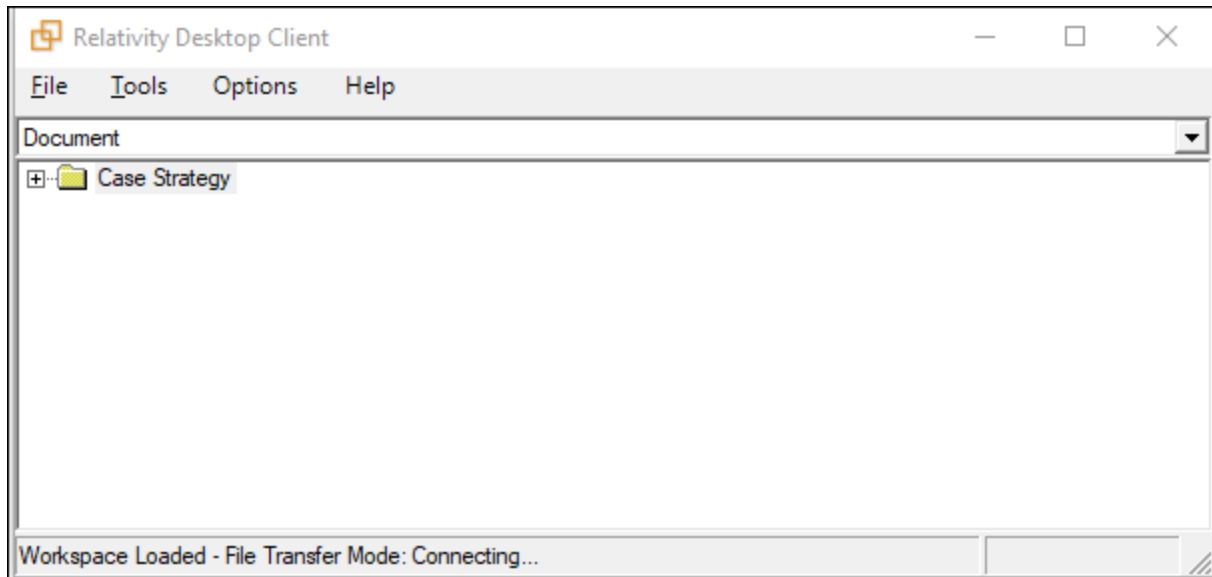
For more information, see Importing through the RDC.

When transcripts are imported using Relativity Desktop Client, they are initially created as native documents. When you view the native documents in the Viewer, the transcript is processed and all of the transcript data is populated.

You can use a relative or absolute path when importing transcripts using the RDC. An example of a load file is provided below.
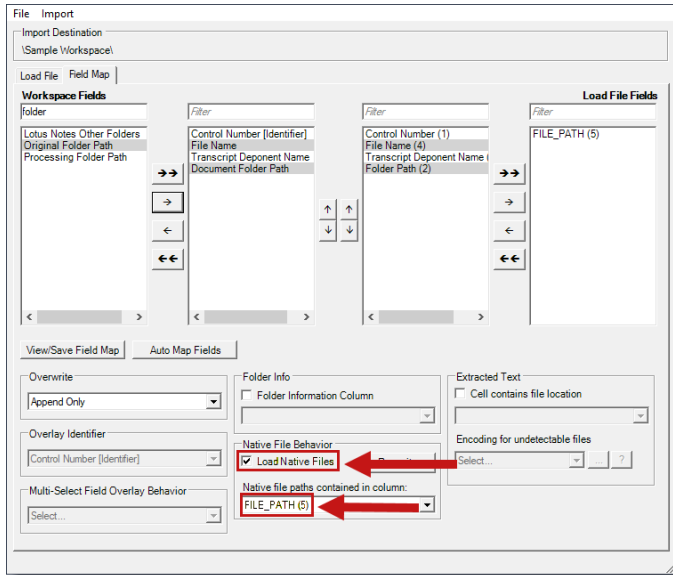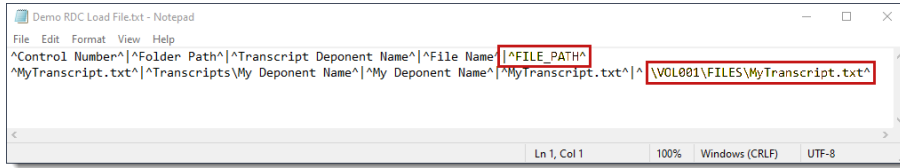
3.4 Reading transcripts with page number

There may be situations where you only upload a portion of a transcript, or split up a witness transcript in volumes.

Page numbers will appear on transcripts to indicate the page number for the whole transcript, and not the imported portion. The Viewer will still show page number based on the uploaded amount of pages.

```
32:1                                          Tuesday June 21, 1994
   2     The Foreperson:   You may proceed.
   3     Ms. Clark:   Thank you.
   4         The People would call Mr. Jose Camacho.
   5     The Foreperson:   Jose Camacho?
   6     The Witness:   Yes.
   7     The Foreperson:   Please raise your right hand.
   8         You do solemnly swear the testimony you are about to
   9         give in the matter now pending before the Grand Jury
  10         of the County of Los Angeles shall be the truth, the
  11         whole truth and nothing but the truth, so help you God.
  12     The Witness:   Yes, ma'am.
  13     The Foreperson:   Please be seated.
  14         Mr. Camacho, please state and spell your full name,
  15         speaking directly into the microphone.
  16     The Witness:   Jose, J-O-S-E, last name C-A-M-A-C-H-0,
  17         Camacho.
  18     The Foreperson:   Thank you. You may proceed.
  19
  20                     Jose Camacho,
  21       Called as a witness before the Los Angeles County Grand
  22          Jury, was duly sworn and testified as follows:
  23
  24                   E X A M I N A T I O N
  25                     by Mr. Conn:
- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
33:1
   2     Q.   Sir, can you tell us where it is that you work?
   3     A.   I work at 306 -- excuse me -- 310 South Broadway in
   4          downtown Los Angeles.
   5     Q.   What type of business is that?
   6     A.   It's a cutlery shop.  We sell knives, scissors, clippers,
   7          driers, different items.
```

3.5 Supported file types

The Transcripts application supports a number of different file types.

3.6 Editing the Transcripts Import Layout

To edit the Transcripts Import Layout:

1. Navigate to the **Layouts** tab.

2. Click on the **Transcripts Import Layout**.

3. Click **Build Layout**.

4. Customize your layout by dragging and dropping fields into the Transcript Fields category. Certain fields will not display as options when you're customizing the Transcripts Import Layout because they are set during the import process of a transcript file. These fields include:

   - Control Number

   - Extracted Text

   - File Extension

   - File Name

   - File Size

   - Is Transcript

   - Transcript Bundle

   - Transcript Deponent Name

   - Transcript Document Type

   - Transcript Metadata

   - Transcript Name

   - Transcript OI Metadata

   - Transcript Viewer Text

   - Transcript Word Index

   For more information, see Using the layout builder.

5. Click **Save**.

The Transcript Information category does not change and includes the following fields:

- Control Number
- Deponent Name

If you upgrade, your customized layout does not change.

4 Supported file types for the Transcripts application

The Transcripts application supports a number of file types and each one is described below.

These sections detail the load file requirements for the respective file types.

4.1 Supported file types

- .ptf
- .xmptf
- .rtf
- .trn
- .lef
- .xmef
- .txt
- .mp4

4.2 Special considerations

Special considerations include:

- The Relativity Desktop Client only supports these transcript file types: .ptf, .xmptf, .rtf, .txt, .trn, and .lef.
- The Transcripts applications supports UTF-8 encoding. UTF-8 BOM is not supported.
- The Transcripts application does not support transcript files that contain footers. For example, the .txt transcript file below is not supported because it contains a footer.
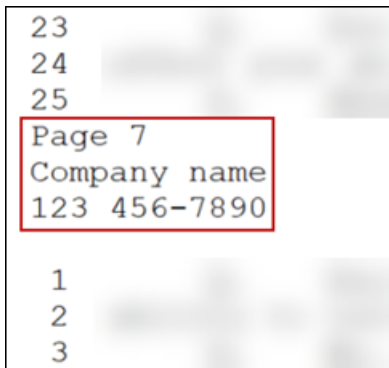
  See Uploading transcripts.

- The Transcripts application does not support Transcript files that contain a word index before they are uploaded to Relativity. For example, the .txt transcript file below is not supported because it contains a word index.

```
allegations 80:17
83:25 199:13,23
201:5 244:3
allege 199:1
alleged 79:5,14
80:18,24,25 81:6,7
82:1,8,13,24
[6 - alleged]
```

See Word index and Uploading transcripts.

4.3 Transcripts sync to video

When uploading video with transcripts files, each transcript must be synced to one .MP4 video. Transcripts synced to multiple videos are not supported. If you have a transcript synced to multiple videos, please have your transcript provider merge the files into a single .MP4 file.

Note: The Transcripts application supports transcript files up to 10GB. The upload can be a mix of transcript files, exhibits, and video files.

The Transcripts application supports the following syncing method:

- **TimeCoder Pro syncing, using their Export to ASCII Format** - The transcripts application supports video synced transcripts through TimeCoder Pro. You should provide the following specifications to the Transcripts vendor so that the files you receive can easily be imported into the Relativity Transcripts application. From TimeCoder Pro, the Transcript text file should be exported selecting the export to ASCII format with the additional option of export with time codes selected. When exporting with time codes, you can select to include seconds and milliseconds. If the time codes are not included in the text file export, the Transcripts application will not have the data necessary to play the synchronized transcript. To import your synced transcript, you will first select the .txt file you want to upload and then select the single .MP4 video file and any exhibits that you would like

to link to your transcript.

```
00:00:09.250  00004:01        THE VIDEOGRAPHER:  Good afternoon.  We are
00:00:10.740       02  going on the video record at 1:47 p.m.  Today's date
00:00:15.240       03  is September 5th, 2019.  This begins Media Unit 1 in
00:00:20.250       04  the video recorded deposition of Maxine Wolf taken on
00:00:23.210       05  behalf of the plaintiffs in the case matter of
00:00:28.790       06  Cerdito, et al., versus Wolf Development filed in the
00:00:31.290       07  United States District Court for the District of New
00:00:34.561       08  Jersey.
00:00:34.880       09            This deposition is being held at the
00:00:36.500       10  law offices of Halliwell and Phillips located in
00:00:40.310       11  Hammington, New Jersey.
00:00:42.930       12            My name is Kevin Duncan, and I am a
00:00:44.580       13  certified legal video specialist from the firm of
00:00:47.250       14  Veritext Legal Solutions.  The court reporter today
00:00:49.750       15  is Ms. Theresa Lazzaro from the firm of Veritext
00:00:53.040       16  Legal Solutions.
00:00:54.213       17            Will the court reporter please
00:00:55.494       18  administer the oath?
00:00:58.338       19                (WHEREUPON, the witness was
00:01:01.181       20                 duly sworn.)
00:01:04.025       21    THE VIDEOGRAPHER:  You may proceed.
00:01:04.506       22
```

4.3.1 .txt files

Transcripts application completes a header validation for .txt files. You can use the following as an example of a .txt file: MaxineWolf_Deposition_Text.txt.

The first five lines of a text file need to be one of the three options below:

- number space text

```
1  0233
2  1              UNITED STATES DISTRICT COURT
3  2              SOUTHER DISTRICT OF CALIFORNIA
4  3
5  4   CROSSFIT, INC., a Delaware
```

- number symbol space text

```
1  0=
2  1=                         Court NS : T-1439-02
3  2=
4  3=
5  4=
```

- space number space text

```
1  Johnson, Frank - Vol. I
2  page 1
3
4   1
5   2        SUPERIOR COURT OF THE STATE OF CALIFORNIA
```

4.4 Transcripts with hyperlinked exhibits

4.4.1 .lef files

Transcripts application supports .lef files that are a zip file and contain any of the following files:

- .ptf
- .xmptf
- .txt

.lef files that are password protected are not supported.

4.5 Text transcript file types

4.5.1 .ptf files

.ptf files will normally have the same file format that includes the following three lines:

- begin=Head
- type=ptf
- begin=Text

```
 1    begin=Head
 2    type=ptf
 3    version=1.3
 4    end=Head
 5    begin=CaseInfo
 6    path=C:\Users\Public\Documents\Westlaw Case Notebook\Cases\_DEMO35_.pxl
 7    name=Gil Bower v. DC Corporation
 8    end=CaseInfo
 9    begin=TranscriptInfo
10    datetime=2007 12 10 08 30 00
11    name=Evans, Walter
12    begin=DocLevelIssues
13    end=DocLevelIssues
14    begin=comments
15    end=comments
16    pagenames=1,2,3,4,5,6,7,8,9,10,11,12,13,14,15,16,17,18,19,20,21,22,23,24,25,2
17    linenames=1,2,3,4,5,6,7,8,9,10,11,12,13,14,15,16,17,18,19,20,21,1,2,3,4,5,6,7
18    linetimestamps=,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
19    firstpage=1
20    pagelen=25
21    end=TranscriptInfo
22    begin=ActiveIssues
23    begin=IssueNumbering
24    12=4.0
25    end=IssueNumbering
26    begin=IssueColor
27    12=#FD553E
28    end=IssueColor
29    12=Impeachment by plaintiff
30    end=ActiveIssues
31    begin=DeletedIssues
32    end=DeletedIssues
33    begin=Annotations
34    begin=anno
35    pos=555 0 558 22
36    issues=12
37    begin=note
38    0=
39    1=
40    2=          Plaintiff may try to portray Parker as deceptive or incompeten
41    3=
42    4=
43    end=note
44    end=anno
45    end=Annotations
46    begin=Text
47    0=          IN THE UNITED STATES DISTRICT COURT
48    1=        FOR THE NORTHERN DISTRICT OF CALIFORINIA
49    2=GIL R. BOWER   ,                    | CASE NO. 3:05-CV-90991
50    3=                                    |
```

4.5.2 .xmptf files

.Xmptf files will normally have the same file format that includes the following three lines:

- begin=Head
- type=ptf
- begin=Text

To differentiate from .ptf files, these also contain the following lines:

- linesnames=
- linetimestamps=

```
1    begin=Head
2    type=ptf
3    version=1.3
4    end=Head
5    begin=CaseInfo
6    path=
7    name=
8    end=CaseInfo
9    begin=TranscriptInfo
10   datetime=
11   name=
12   guid=38a3410090872a4a4972378f39d69b283d92f464
13   fp=f8e70e8c7cf5f737f8993205958088c4fad9c249
14   depolines=0
15   restartid=
16   pagenames=1,2,3
17   linenames=1,2,3,4,5,6,7,8,9,10,11,12,13,14,15,16,17,18,19,20,21,22,23
18   linetimestamps=,,11:17:22,11:17:22,11:17:22,11:17:23,11:17:27,11:17:3
19   firstpage=1
20   pagelen=25
21   end=TranscriptInfo
22   begin=ActiveIssues
23   end=ActiveIssues
24   begin=DeletedIssues
25   end=DeletedIssues
26   begin=IssueColors
27   end=IssueColors
28   begin=Annotations
29   end=Annotations
30   begin=Text
31   0=                              JOHN DOOLEY,
32   1=having first been duly sworn, testified as follows:
33   2=                         DIRECT EXAMINATION
```

4.5.3 .rtf files

With .rtf files, all transcripts must contain one of the following headers:

- \rt-f1\ansi\ansicpg1252\uc1\deff0\stshfdbch0\stshfloch0\stshfhich0\stshfbi0\deflang1033\deflangfe1033

○ Transcript lines start on \fs22.

■ \rtf1\ansi\ansicpg1252\deff0\deflang1033

○ Transcript lines end on \line.

4.5.4 .trn files

Transcripts application supports .trn files that adhere to the following requirements:

■ Start with an XML element

■ Contain a <TRN> element.

■ Contain a <Transcript> element.

■ Contain a control character for line page divider.

```
  1    <?xml version="1.0"?>
  2   ⊟<TRN>
  3    <DocType>Summation Transcript Export File</DocType>
  4    <Version>0.9</Version>
  5    <Source_Loc>S:\DATA\SUMLG\CASEDATA\P. FRANC VS. K. MORRIS (version 2.5)\TRAN\</Source_loc>
  6    <Transcript_Name>Lambert1.txt</Transcript_Name>
  7    <Transcript_Description>Lambert1</Transcript_Description>
  8   ⊞<Notes>
 76   ⊟<Transcript Info>
 77    -1,10,6,0,0
 78    </Transcript Info>
 79   ⊟<Transcript>
 80    00010
 81       1                                         Court N : T-1439-02
 82       2                        FEDERAL COURT OF CANADA
 83       3                             TRIAL DIVISION
 84       4                               OBERTHUR GAMING TECHNOLOGIES
 85       5                                          Plaintiff
 86       6                        -vs-
 87       7                        POLLARD BANKNOTE LIMITED
 88       8                                          Defendant
 89       9   Appearances:
 90      10   Mr. CHRISTOPHER C. VAN BARR
 91      11   Ms. MARTHA J. SAVOY
 92      12   for Plaintiff
 93      13   Mr. RONALD E. DIMOCK
 94      14   Mr. DAVID M. REIVE
 95      15   for Defendant
 96      16                               SEPTEMBER 9, 2003
 97      17   AA030909.A                   ANITA AUZA O.C.R.
 98      18
 99      19
100      20
101      21
102      22
103      23
104      24
105      25
106   ⌷⌷00011
107       1                        I N D E X
108       2                                          PAGE
109       3   EXAMINATION ON DISCOVERY
110       4      CLAUDE LAMBERT
111       5         Examination . . . . . . . . . . . . . . . . . 11
112       6            ----------------------
113       7
114       8
```

4.5.5 .xmef files

Transcripts application supports .xmef files that are zip file and contain any of the following files:

- .ptf
- .xmptf
- .txt

Note: .xmef files that are password protected are not supported.

4.5.6 .txt files

Transcripts application completes a header validation for .txt files. You can use the following as an example of a .txt file: MaxineWolf_Deposition_Text.txt.

The first five lines of a text file need to be one of the three options below:

- number space text

```
  1    0233
  2   1                    UNITED STATES DISTRICT COURT
  3   2                    SOUTHER DISTRICT OF CALIFORNIA
  4   3
  5   4    CROSSFIT, INC., a Delaware
```

- number symbol space text

```
1   0=
2   1=                                    Court N§ : T-1439-02
3   2=
4   3=
5   4=
```

- space number space text

```
1   Johnson, Frank - Vol. I
2   page 1
3
4   |1
5   2        SUPERIOR COURT OF THE STATE OF CALIFORNIA
```

5 Annotating transcripts

When you open a transcript in the Viewer, you can add the following annotations:

- Notes
- Designations
- Exhibits
- URLs

You can also use the same functionality that you use with other file types in the Viewer. For more information, see the Viewer documentation.

> **Note:** If you want to see the full document while using Case Dynamics, you can open the document in the pop-out viewer and still use the coding panel.

5.1 Transcripts layout

These annotations are logged in the Transcripts layout and are called out by page and line numbers. If you click on the line number, this takes you to the exact place the annotation is located on the transcript. Clicking on the Exhibit hyperlink opens the document in the Viewer. Clicking on the Note hyperlink sends you directly to the Notes object under the Transcripts tab. The objects on the tabs are sorted by the **Created On** field. The newest object created is listed first. For more information, see Transcripts tab.

Coding Layout   Case Dynamics   Video Clips

Edit   Transcripts ▾ ✏️

Transcript Information

Deponent Name	Maxine Schlect Wolf
Deponent Type	Character Witness
Depositon Date	05/09/2019
Volume	3
Status	Final
Transcript Source	Deposition
Taking Attorney	Mark Simpson
Defending Attorney	Breanna Johnson
Party	Plaintiff
Comment	
Is Transcript	✔

Exhibits   Designations   Notes   URLs   Video Clips

Link   Unlink

📊 🔽 🔽 ↔ ⬍ | 1 | - 4 of 4 | 10 ▾ | per page ⏮ ◀ ▶ ⏭

☐	Location	Document Ref
		Filter
☐	6:17 - 6:17	SAM0000008
☐	10:10 - 10:10	SAM0000002
☐	13:7 - 13:7	SAM00000014
☐	17:13 - 17:13	SAM00000018

Family ▾   Document History ▾

5.2 Adding notes

To add a note:

1. Select text and right-click.

2. Select **Add Note**. A pop-up appears in the margins.

3. Type your note.
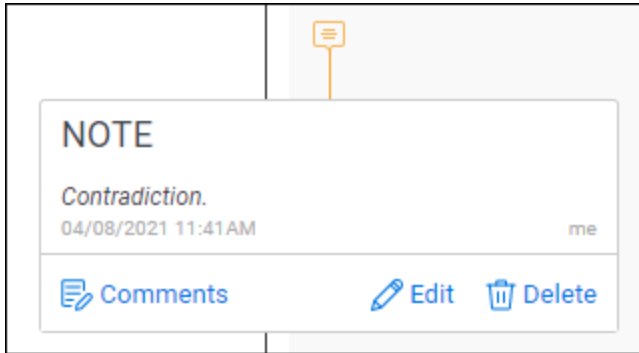
4. Click **Save**.

You can then edit, delete, or comment on the note. Other users can comment on your note as well with the ability to create comment threads by replying. You can edit or delete your comments.
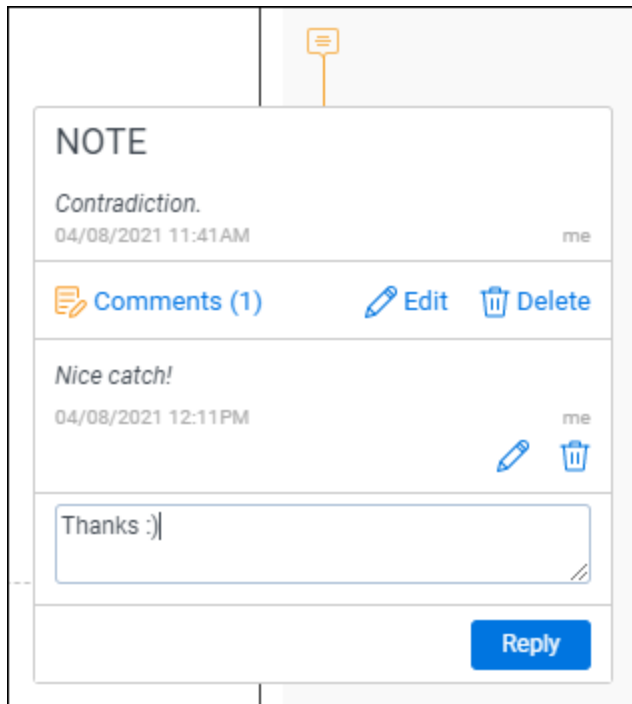
Comments and replies are time stamped along with the name of the user who left the comment.
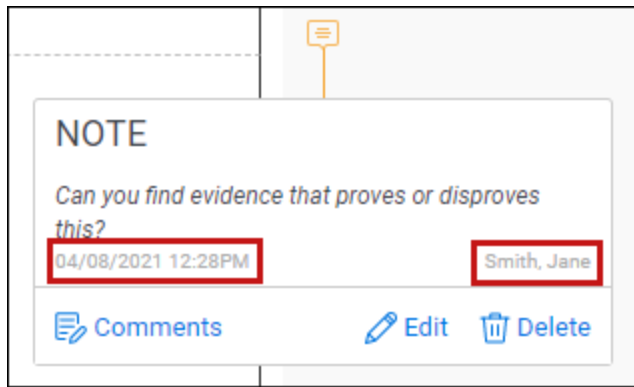
5.2.1 Expanding notes

Sometimes there are many notes on a single page of a transcript and you cannot read the text all at once.

Beginning in 9.7.229.5, you can choose to expand or collapse all the notes in a page at once.

To expand/collapse notes, click on the expand/collapse notes icon ( ) along the top of the Transcripts Viewer. When notes are expanded, they will appear on the left side of the transcript text. Each note indicates which page and line number it is tied to.

5.3 Adding designations inline

To add a designation:

1. Select text and right-click.

2. Select **Add Designation**.

3. Click to add a Designation Type or choose an existing designation type. The list of designations are alphabetized.
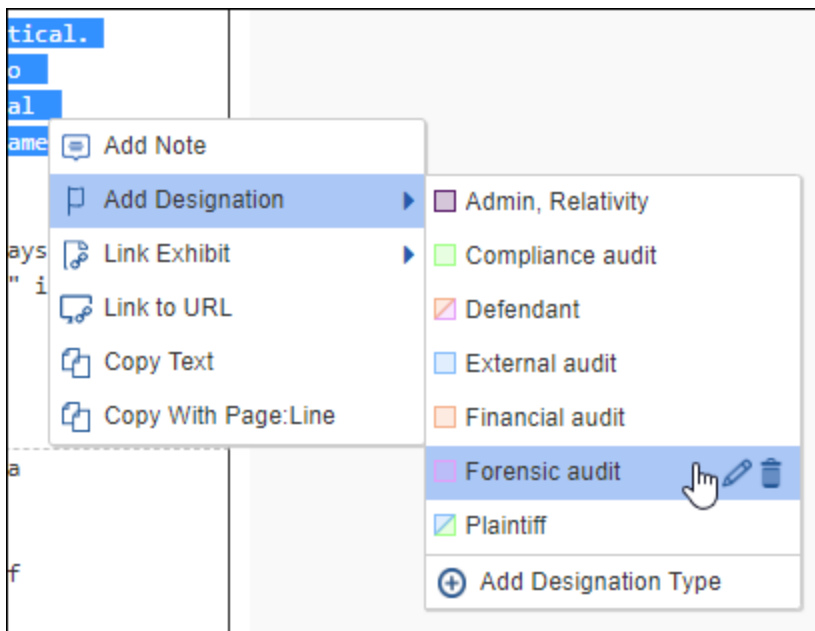
You can also edit or delete an existing designation.

> **Note:** Deleting a designation removes all instances of the designation. You receive a warning notifying you before you delete.

4. A bracket appears in the margins. You can change the color of the bracket for all designations of that type by right-clicking on the bracket and selecting the drop-down arrow next to the designation type under **Change Designation**. You can also change the designation type or remove the designation by right-clicking.

When you add a Designation Type, a pop-up window appears where you can select up to two colors.
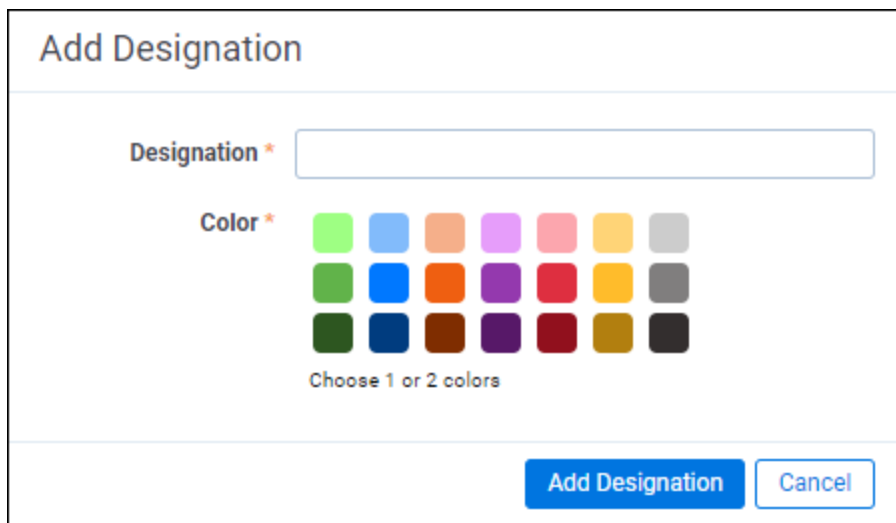
You can add designations over existing designation types. The brackets appear in the order the designations are created with the inner bracket being the first addition.

```
 4  BY MR. JONES:
 5      Q. Please state your name for the record and spell it?
 6      A. My name is John Dooley, D-O-O-L-E-Y.
 7      Q. Please state your address?
 8      A. 4143 White Pine Street, Chicago, Illinois, 60334.
 9      Q. Please state your Social Security number?
10      A. 803-30-4772.
11      Q. Where are you employed?
12      A. I work at Tricor, it is a division of International Association for
    Financial Planning.
13      Q. Division of what -- wait?
14                          (Discussion off the record.)
```

5.4 Uploading designations

You can upload a CSV file containing designations and then view those designations in the Viewer alongside any existing designations that were already on the transcript.

The CSV file must have the following columns:

- **Transcript name** - The name of the transcript.
- **Page From** - The page number on the transcript where the designation starts.
- **Line From** - The line number on the transcript where the designation starts.
- **Page To** - The page number on the transcript where the designation ends.
- **Line To** - The line number on the transcript where the designation ends.
- **Designation** - The designation.

To upload designations from a CSV file:

1. Go to the Designations tab and click **Upload Designations**.

2. Drag and drop your CSV file into the pop-up window or click **browse for a file** and select your CSV file.

3. Verify that Relativity auto-mapped your columns correctly and click **Next**.

4. Verify that Relativity auto-mapped your transcripts correctly and click **Next**.

5. Click **Upload**.

Note: The field for uploaded designations is the same field as designations that are added inline. This means that you will not be able to differentiate in the Viewer of the Review Interface between uploaded designations and designations added inline. To verify that your designations uploaded, look at the System created on field for designations.

5.4.1 Resolving upload designations warnings and errors

When you upload designations, two types of warnings and errors can occur - warnings related to missing data or data type errors in the CSV and import errors.

Uploading designations warnings occur when the CSV file has missing data or data in an invalid format. To resolve the warnings:

1. In the Upload Designations window, click the **Preview # Errors** link.

The Preview Errors pop-up window will open. The Preview Errors pop-up window tells you the location of cells that have warnings attached to them in the CSV file.

Preview Errors

Transcript	Start Page Number	Start Line Number	End Page Number	End Line Number	Designations
1 Christopher C. Van II TRN CH	3	No data exists for this column. Enter data.	No data exists for this column. Enter data.	15	d2
2 Christopher C. Van II TRN CH	No data exists for this column. Enter data.	1	18	10	d4
3 Christopher C. Van II TRN CH	1	Data is in an invalid format. Revise data format to meet column requirements.	Data is in an invalid format. Revise data format to meet column requirements.	9	D11
4 Christopher C. Van II TRN CH	Data is in an invalid format. Revise data format to meet column requirements.	16	34	5	D15
5 Christopher C. Van II TRN CH	15	14	32	13	No data exists for this column. Enter data.
6 Christopher C. Van II TRN CH	14	13	31	12	No data exists for this column. Enter data.

Total items: 6

2. Locate the cells that have warnings in the CSV file and resolve them by either entering the missing data or revising the data format to meet column requirements.

3. Upload the revised CSV.

When an import error occurs, go to the **Errors** tab to find our more information about the error.
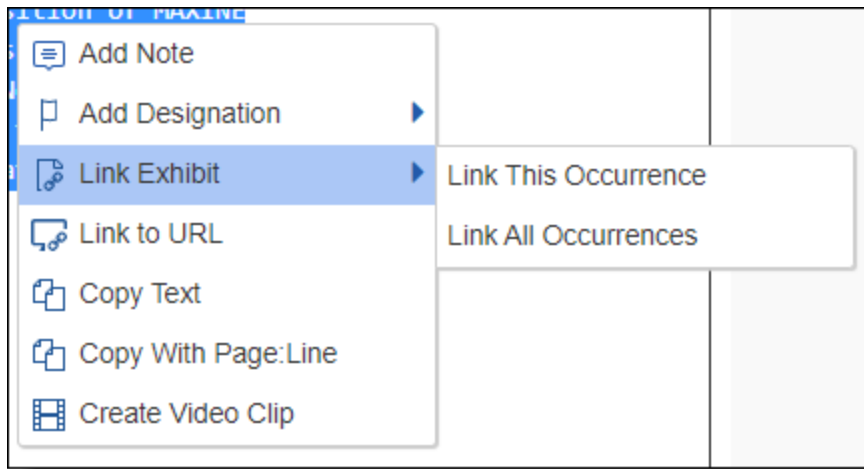
5.5 Linking to exhibits

To link to an exhibit:

1. Select text and right-click.

2. Hover over **Link Exhibit**.

3. Select one of the following:

- **Link This Occurrence** - Links exhibit only to the selected text.

- **Link All Occurrences** - Links exhibit to all occurrences of the selected text in the Transcript.

> **Note:** When you select Link All Occurrences, you will see the progress as each occurrence is saved and you can continue working and completing other actions.

4. A pop-up appears. Select the document you would like to link and click **Set**.

You can remove the link by right-clicking and selecting **Remove Link**. If you click on the link, the document opens in another tab.

You can also link exhibits on the Transcripts layout without directly linking to a line on the transcript:

1. Navigate to the **Exhibits** tab on the layout.

2. Click **Link**.

3. Select the exhibit(s) you would like to link.

4. Click **Add**.

5. Click **Set**.

5.6 Linking to URLs

To link to a URL:

1. Select text and right-click.

2. Select **Link URL**. A pop-up appears.

3. Enter the URL.

4. Click **Link URL**.

You can remove the link by right clicking and selecting **Remove Link**. If you click on the link, the URL opens in a new tab.

5.7 Working with Case Dynamics

You can create and link Case Dynamics items when viewing transcripts or through the Case Dynamics coding pane on the Transcripts layout. For more information, see Case Dynamics.

Case Dynamics items are highlighted with a corresponding color.

The Transcripts Viewer provides a legend to identify Case Dynamics items. To expand the legend, click along the bottom right corner of the Viewer.
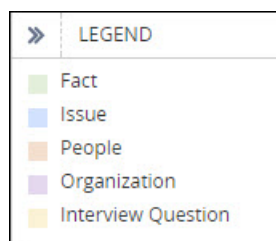
You can hide the legend by clicking [»].

6 Transcript video clips

With the Transcripts application, you can create and export video clips in .CSS (for use in TrialDirector) or .CSV file formats. Exporting in .MP4 format is not available at this time.

6.1 View video clips

To see a list of all the video clips in a workspace, navigate to the **Video Clips** tab.

To see a list of video clips for a particular transcript:

1. Open the transcript in the Viewer.

2. Select the **Transcripts** layout.

3. Click the **Video Clips** tab.

To open a particular video clip in the Video Clipping pane, click on the Video Clip Name of a video clip. The video clip opens in view mode. In view mode, text from the transcript that is not part of the video clip turns gray. You can still annotate gray text.

6.2 Create a video clip

From the Viewer, you can create video clips. Methods include:

- Create a video clip by highlighting text below
- Create a video clip from a preexisting designation below
- Create a video clip while the video is playing in the Viewer on the next page

6.2.1 Create a video clip by highlighting text

To create a video clip by highlighting text:

1. Open a transcript with a video in the Transcripts Viewer.

2. Highlight the text that you want in the video clip.

3. Right click with your mouse. A context menu opens.

4. Click **Create Video Clip**. The Video Clipping pane opens.

5. (Optional) Edit the video clip in the Video Clipping pane. Once you save a video clip, you can only edit the Video Clip Name and Video Clip description fields. See Edit a video clip on the next page.

6. Click **Save Video Clip**.

6.2.2 Create a video clip from a preexisting designation

To create a video clip from a preexisting designation:

1. Open a transcript with a video in the Transcripts Viewer.

2. Right click on a preexisting designation that you want to turn into a video clip. A context menu opens.

3. Click **Create Video Clip**. The Video Clipping pane opens.

4. (Optional) Edit the video clip in the Video Clipping pane. Once you save a video clip, you can only edit the Video Clip Name and Video Clip description fields. See Edit a video clip below.

5. Click **Save Video Clip**.

6.2.3 Create a video clip while the video is playing in the Viewer

To create a video clip while the video is playing in the Viewer:

1. Open a transcript with a video in the Transcripts Viewer.

2. Click to open the video player in the Viewer. The video transcripts starts playing.

3. Click New Video Clip when the video reaches the spot where you want your video clip to start. The Video Clipping pane opens. Relativity marks the **To** field as the last page:line number of the Transcript.

4. (Optional) Edit the video clip in the Video Clipping pane. Once you save a video clip, you can only edit the Video Clip Name and Video Clip description fields. See Edit a video clip below.

5. Click **Save Video Clip**.

6.3 Edit a video clip

Before you save a new video clip, you can edit it in the Video Clipping pane.
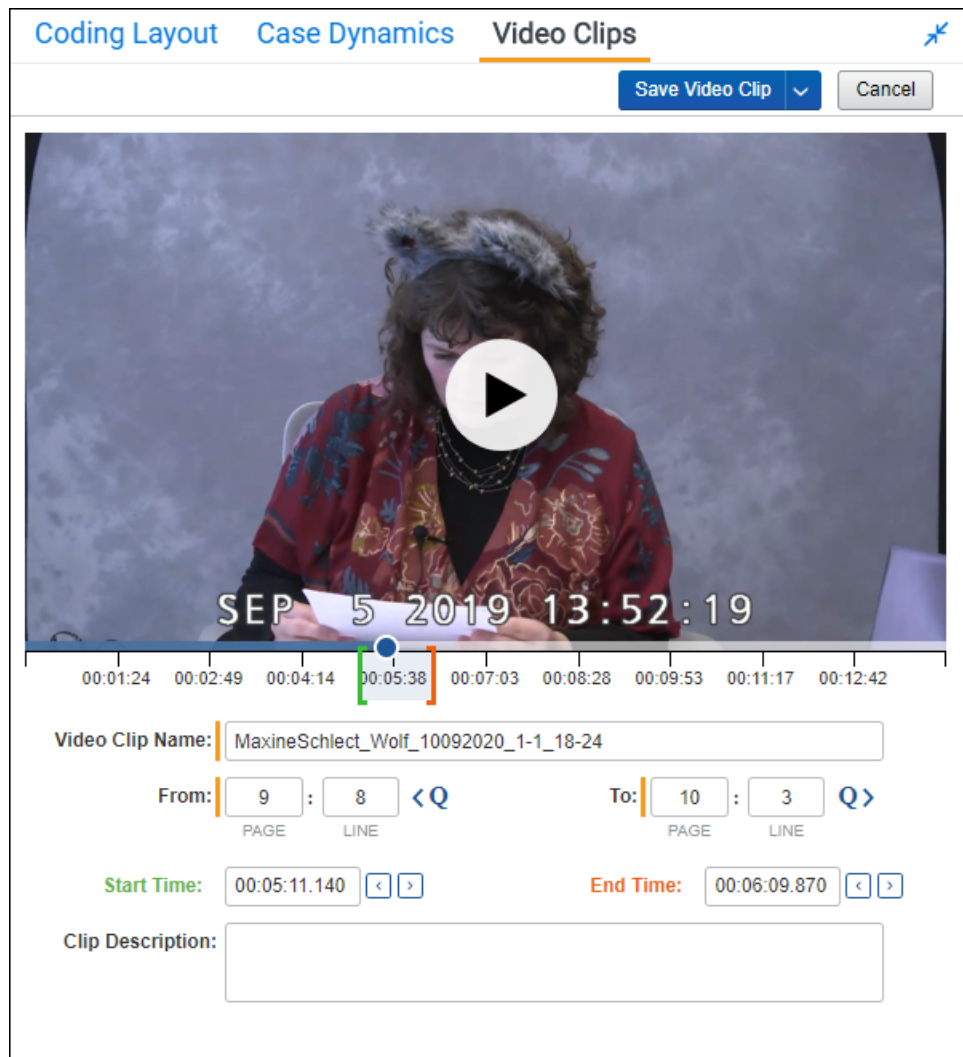
The Video Clipping pane contains these editable features and fields:

- **Video** and **Video clip bar** - a video of the transcript with a bar that allows you to dynamically adjust the video clip position and duration. When you click play on the video, only the clipped portion of the video will play, and a blue dot shows where in the clip you are. In addition to the blue dot, the Video clip bar contains two brackets. The green bracket shows where the video clip starts, and the red bracket shows where it ends. Only the video contained within the brackets will be part of the video clip when you save it. You can move both brackets to edit the video clip as well as move the blue dot to dynamically seek any time position within the brackets. To make it clear where the video clip ends, the blue dot snaps back to the red bracket automatically when you drag the blue dot beyond the red bracket on the time stamp bar.

- **Video Clip Name** - the name of the video clip. When you create a new video clip, Relativity automatically generates this field. The default naming convention is [Deponent's name]_[Today's date]_ [the first line number of the video clip]_[the final line number of the video clip]. As long as the Video Clip Name is unique, you can edit the field. An error message will display if the Video Clip Name already exists.

- **From** - denotes the starting page and line number of the video clip. You can manually edit both the page and line number. To move the page and line number to where the previous question starts, click ⟨Q . If the icon is grayed out, there isn't a previous question in the file.

- **To** - denotes the last page and line number of the video clip. You can manually edit both the page and line number. To move the page and line number to the following question, click Q⟩ . If the icon is grayed out, there isn't another question in the file.

- **Start Time** - denotes the time at which the video clip starts. You can manually edit the this field. You can also click ⟨ or ⟩ to move the start time to the previous or next time stamp.

- **End Time** - denotes the time at which the video clip ends. You can manually edit the this field. You can also click ⟨ or ⟩ to move the end time to the previous or next time stamp.

- **Clip Description** - a space for you to enter a description of the video clip.

All of the fields in the Video Clipping pane are synchronized. For example, if you change the Start Time of the video clip, the green bracket on the time stamp bar and the From field adjust to reflect the new time. The text in the Viewer also adjusts to reflect the change. On the Transcript in the Viewer, black text is included in the video clip while gray text is not part of the video clip. You can still annotate gray text in the Viewer.

If you enter an invalid entry in a Video Clipping pane field, an error message displays above the video. Once you resolve the error, the error message goes away.

6.3.1 Edit a saved video clip

Once you save a video clip, you can only edit the **Video Clip Name** and **Clip Description** fields. If you need a saved video clip to be longer or shorter, delete the saved video clip and create a new video clip.

There are two ways to edit the Video Clip Name and Clip Description fields:

- From the Video Clips Pane, open the video clip that you want to edit in view mode and click **Edit**. After editing the fields, click **Save**.

- From the Video Clips tab, click on the Video Clip Name of the video that you want to edit. The Transcript Video Clip layout opens. Click **Edit**. After editing the fields, click **Save**.

6.4 Export a video clip in .CSS or .CSV

**Note:** Exporting in .MP4 format is not available at this time.

You can export a video clip three ways:

- Save and export a video clip below

- Merge and export video clips on the next page

- Export video clips on the next page

6.4.1 Save and export a video clip

To save and export a video clip once you're done editing it:

1. In the Video Clips card, click the drop-down arrow on the save menu and select **Save and Export**. The Save and Export Video Clip modal displays.
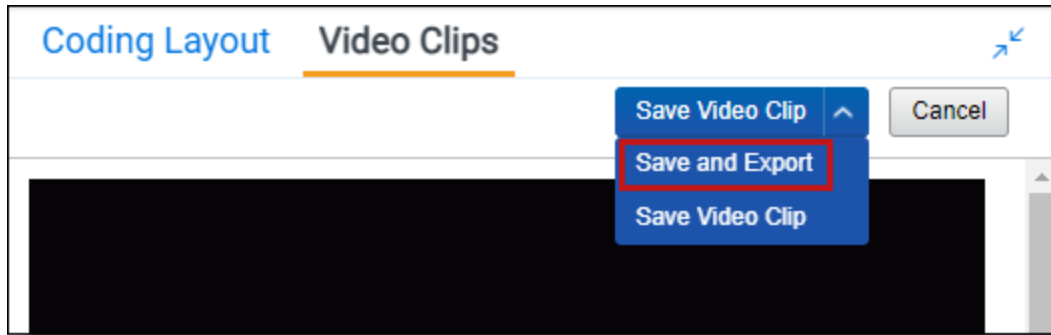
2. Select a **Video Clip Format**. Options include .csv and .ccs.

3. Click **Save and Export Video Clip**.

6.4.2 Merge and export video clips

To reorder and export video clips from the same transcript:

1. In the Video pane, click **All Video Clips**.

2. Select the video clips that you want to merge and export.

3. Click **Merge and Export** from the mass operations bar. The Merge and Export Video Clips pop-up opens.

4. Modify the fields on the Merge and Export Video Clips window as needed.

   - **Merge Video Name** - the name of the file you will export.

   - **Video Clip Format** - options include .csv and .ccs.

   - **Clip Order** - the order the video clips are listed. To reorder the clips, you can drag and drop the clips. To remove a clip from the merge and export, hover over the clip video clip you want to remove with your mouse and then click 🗑 when it appears.

5. Click **Merge and Export Video Clips**.

6.4.3 Export video clips

To export video clips from the same transcript:

1. Open the Video Clips card.

2. Select the video clips that you want to export.

3. Select **Export Video Clips** from the mass operations bar. The Export Video Clips modal displays.
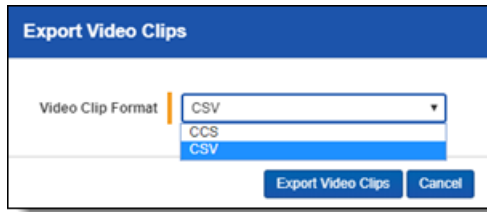
4. Select a **Video Clip Format**. Options include .csv and .ccs.

5. Click **Export Video Clips**.

6.4.4 Export fields

Export fields include:

- **Control Number** - the control number of the transcript file that the video clip is from.
- **Video Clip Name** - the name of the video clip.
- **Location From** - the page and line number at which the video clip starts.
- **Location To** - the page and line number at which the video clip ends.
- **Start Time** - the time at which the video clip starts.
- **End Time** - the time at which the video clip ends.
- **Clip Length** - the length of the video clip.
- **Clip Transcript Text** - the transcript text from the video clip.
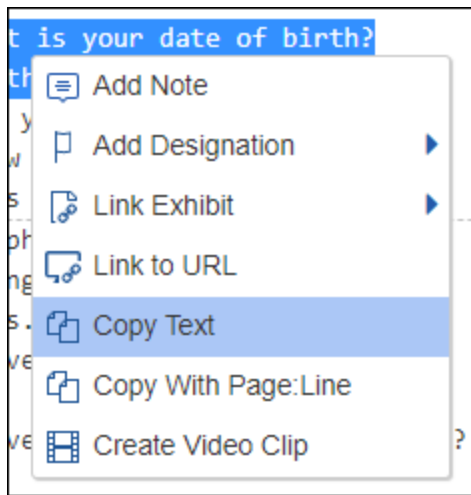- **Clip Description** - a description of the video clip.

7 Copying text from a transcript

You can copy transcript text with or without page:line numbers with the Transcripts application.

7.1 Copying text only

To copy transcript text only:

1. Open a transcript in the Viewer .

2. Select the text you want to copy.

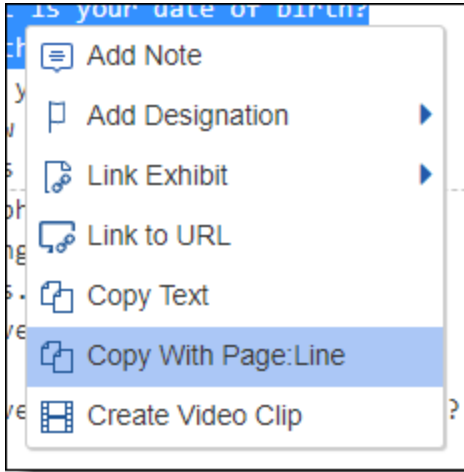3. Right-click and select **Copy Text**.

7.2 Copying text with page:line numbers

To copy text with page:line numbers:

1. Open a transcript in the Viewer.

2. Select the text you want to copy.

3. Right-click and select **Copy With Page:Line**.

You can also use the following keyboard shortcuts after selecting the text you want to copy:

- **Ctrl + C** - copies text only.
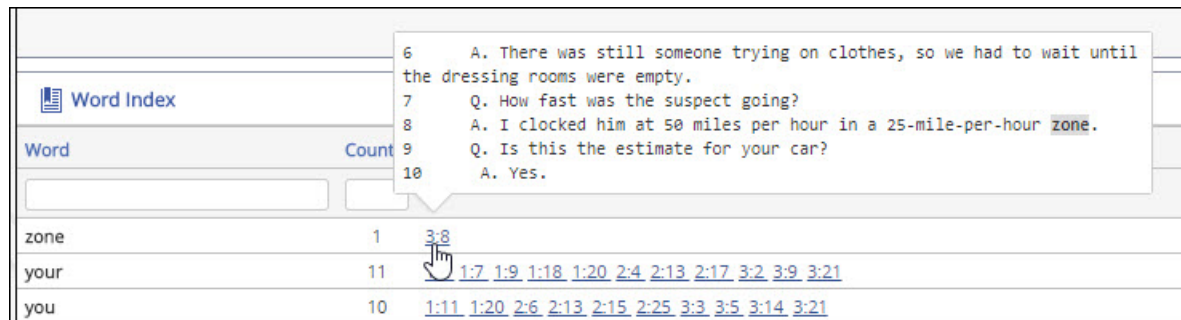- **Ctrl + Alt + C** - copies text with page:line numbers.

8 Word Index

The Word Index lists out all the different terms that are found in the transcript.

8.1 Using the Word Index

To access the Word Index, click , located along the bottom right corner of the Viewer.

You can search the Word Index for a phrase that has up to 5 words. For example, you can search for Exhibit 1.

When you hover over a location hyperlink, a pop-up appears that shows you the section of the transcript where the term appears. You can also filter by word or count.

You also have the ability to add up to three additional lines above and below the line where the term is located by using the tool tip. To access the tool tip, click and enter the number of lines you would like to add above and below where the word is located. The default additional lines above and below is two.
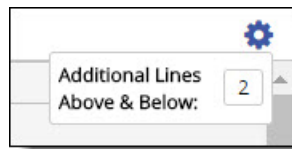
8.2 Word Index fields

The Word Index contains the following fields:

- **Word** - contains the term.
- **Count** - contains how many times the term appears in the transcript.
- **Locations** - contains hyperlinks to all the places in the transcript where the term appears.

9 Transcript reports

You can export the different annotations and items that have been linked to the transcript(s), including Case Dynamics items.

9.1 Creating a transcript report

To create a transcript report:

1. Navigate to the Documents tab.

2. Select multiple or a single transcript(s) to report on.

3. Click the mass operations button and select **Transcript Report**. A pop-up appears.

4. Select one of the following report types:

   - Annotations Digest

   - Key Terms

5. Fill out the applicable fields and select **Export.**

9.2 Annotations Digest

The Annotations Digest report exports a PDF with the selected annotations that contains the following information:

- Case Name

- Transcript Name

- Type of annotation with total number of annotations selected

- Individual representations of each annotation with corresponding page and line numbers

- Case Dynamics items

- Time and date of digest generation

To run the Annotations Digest, fill out the following fields:

- **Include All Annotations** - select all or which annotation types and Case Dynamics items you would like to include. In the bottom section of the report pop-up, you can choose to include or exclude specific annotations.

  Note:

- **Include Entire Question and Answer** - select Yes/No to include the nearest question and answer in the selected annotation.

Export 1 Transcript

Export **Cancel**

Report

Report type ● Annotation Digest
        ○ Key Terms

Include annotations
☐ All
☐ Exhibits
☐ Designations
☑ Notes
☐ URLs
☐ Facts
☐ Issues
☐ People (Entity)
☐ Organizations (Entity)
☐ Interview Questions

Include entire question & answer ● Yes
       ○ No

Additional lines above & below `3`

Exhibits   Designations   **Notes**   URLs

🔻 🔻⊘ | Items `1` - 3 (of 3) |◄ ◄ ► ►|

☑	Document	Location	Text	Created By	Created On
☑	Wolf, Maxine.txt	7:11 - 7:11	Contradiction.	Admin, Relativity	4/8/2021, 4:41:31 PM
☑	Wolf, Maxine.txt	7:21 - 7:21	Did we receive this evidence?	Admin, Relativity	4/8/2021, 4:35:42 PM
☑	Wolf, Maxine.txt	8:23 - 8:24	Can you find evidence that proves or disproves this?	Smith, Jane	4/8/2021, 5:28:33 PM

3 Selected Item(s)   Select Page Size: `10` ⌄

9.3 Key Terms

The Key Terms report exports a PDF with the chosen key terms that contains the following information:

- Case Name

- Transcript Name

- List of key terms

- Individual representations of each key term with corresponding page and line numbers, including the additional lines above and below the term

- Time and date of digest creation

Key terms are highlighted in the report.

To run the Key Terms report, fill out the following fields:

- **Include Entire Question and Answer** - select Yes/No to include the nearest question and answer in the selected annotation.

- **Additional Lines Above & Below** - enter the additional lines (up to 10) you would like to include above and below the line where the term is located.

- **Key Terms** - enter the key terms you would like to run the report on, with each term on a separate line.

Export 1 Transcript

Export   Cancel

Report

Report type   ○ Annotation Digest
○ Key Terms

Include entire question & answer   ● Yes
○ No

Additional lines above & below   3

Key Terms

Key Terms

10 Printing transcripts

To print transcripts from the Viewer:

1. Select the Print/Save As PDF to print icon along the top of the Transcripts Viewer.
The Transcripts pop-up displays.

2. Complete the following fields as desired:

    1. **Pages per Sheet** - Select to print transcript pages as one page per sheet or select condensed printing to print four pages to a sheet.

    2. **Branding** - Select to include branding as a Center Header, Center Footer, or select None for no branding.

    3. **Include** - Select to include the Workspace Name, Transcript Name, Deposition Date, Deponent Name, and/or Page Numbers.

    4. **Print With** - Select to include Notes and/or Designations in the print out.

        Notes:
        - Notes and/or Designations will only appear if you select to print transcripts as one page per sheet.

        - Comments within notes are included when you select Notes, so you can see the full dialogue on printed transcripts.

3. Select **Print Transcript**.

11 Transcripts tab

The Transcripts tab contains individual tabs with views for Notes, Exhibits, URLs, Comments, Designations, and Designation types.

11.1 Notes tab

The Notes tab contains the following fields:

- **Document** - contains the name of the transcript file. It appears as a hyperlink that opens the file directly in the Viewer.

- **Location** - contains the page and line range in the transcript where the note is found. It appears as a hyperlink that opens the file in the Viewer and takes you directly to the location of the note.

- **Note** - contains the full text of the note. It appears as a hyperlink that takes you to the Notes Layout with full note details.

11.2 Exhibits tab

The Exhibits tab contains the following fields:

- **Document** - contains the name of the transcript file. It appears as a hyperlink that opens the file directly in the Viewer.

- **Location** - contains the page and line range in the transcript where the exhibit is linked. It appears as a hyperlink that opens the file in the Viewer and takes you directly to the place where the exhibit is linked. If the exhibit is not directly linked to a location in the transcript, this field will be empty.

- **Document ref** - contains the name of the linked exhibit. It appears as a hyperlink that opens the file directly in the Viewer.

11.3 URLs tab

The URLs tab contains the following fields:

- **Document** - contains the name of the transcript file. It appears as a hyperlink that opens the file directly in the Viewer.

- **Location** - contains the page and line range in the transcript where the URL is linked. It appears as a hyperlink that opens the file in the Viewer and takes you directly to the location where the URL is linked.

- **Link** - contains the full text of the URL.

  Note: The URL is only text and does not link out. You need to copy the URL and paste it in another window/tab to access the link. From within the transcript, you can click directly on hyperlinked text.

11.4 Comments tab

The Comments tab contains the following fields:

- **TranscriptsNote::Note** - contains the full text of the note left on the transcript that a user commented on.
- **System Created By** - contains the name of the user who left the comment.
- **System Created On** - contains the date and time the user left the comment.
- **Comment** - contains the full text of the comment.

11.5 Designations tab

The Designations tab contains the following fields:

- **Document** - contains the name of the transcript file.
- **Location** - contains the page and line range in the transcript where the designation type is found. It appears as a hyperlink that opens the file in the Viewer and takes you directly to the designation type location.
- **Designation Type** - contains the type of designation assigned.

11.6 Designation Types tab

The Designation Types tab contains the designation types users have created. You can edit or delete designation types in this tab.

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