

Processing Document Error Review Quick Reference

This guide provides a high-level workflow for handling document-level processing errors in Relativity 9.5.370.136 and above. This workflow contains the following components:

- Review Document Exception Report
- Review errors on the Document Errors Tab
- Review individual errors on a document error's layout

For purposes of this guide, it's assumed that you've published documents and that you're handling all errors post-publish.

Review the Document Exception Report

The Document Exception Report provides a summary of exceptions for discovery and publishing errors that you can share with the case team. This report is dynamic. You can run it after discovery is complete and after you retry and publish errors.

Key Areas of the Report

- **Error Message column:** all error messages encountered.
- **Count column:** the total number of errors encountered.
- **Distinct Documents with Discover/Publish Errors row:** the total number of documents that encountered errors. Because any single document can have multiple errors, this count might be lower than the total number of errors.
- **Processing Sets section:** all processing sets included in this report.



Doe Derricks Ltd Processing: Document Exception Report

Document Level Errors - Discovery

Error Message	Count
Error occurred when attempting to open the Excel workbook. The workbook may be password protected.	28
Error occurred when attempting to open the Word document. The document may be password protected.	2
Total	30
Total Distinct Documents with Discovery Errors	30

Document Level Errors - Publishing

Error Message	Count
Error in line 1, column "EU". Input length exceeds maximum set length of 50 for the author field.	6
Error in line 100, column "EU". Input length exceeds maximum set length of 50 for the author field.	2
Total	8
Total Distinct Documents with Publishing Errors	8

Processing Sets

UAT-REV001

Custodian	Source Path
Coe, Jane	<u>\\files\Coe\Collected Files\EML Files</u>
Doe, John	<u>\\files\Doe\PSTS</u>

Report Generated: 5/23/2018 8:24:42 PM

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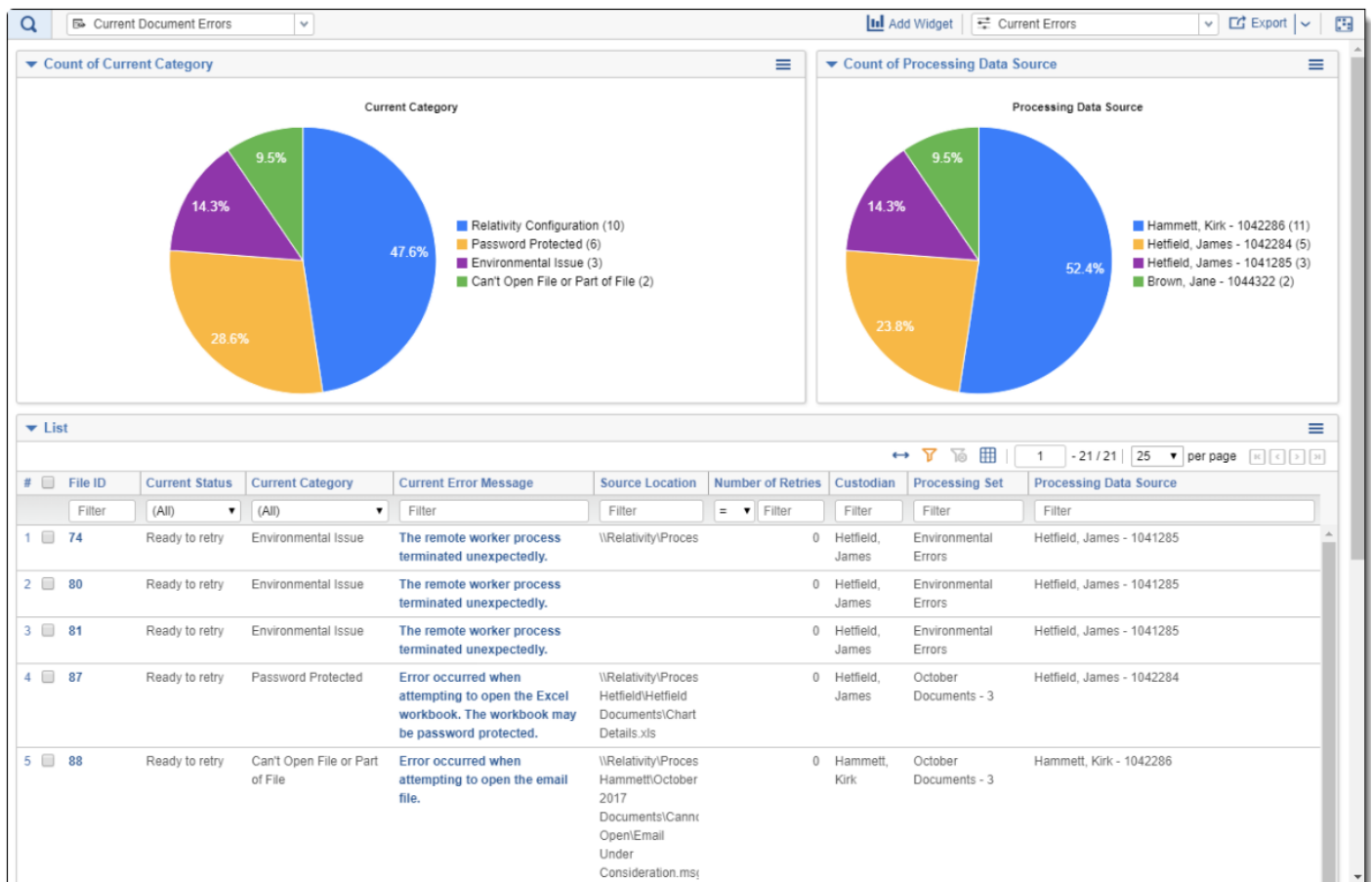
Review the Document Errors Tab

The Document Errors tab allows you to locate errors that occurred in your processing set(s). The view shown below is the Current Document Errors view and the default dashboard is the Current Errors dashboard. You can create your own custom views and dashboards to handle your specific workflow.

Even though a document can have multiple errors associated with it, the Current Document Errors view only displays the first error encountered that currently has a status of Ready to Retry.

Key Areas of the View

- **Count of Current Category Widget:** the system assigned category of the error. You can select a piece of the pie chart to view only the errors that are in that category.
- **Count of Processing Data Source Widget:** the name of the data source containing the files where the error occurred.
- **Error List View:** a list of fields that provide additional information on the error. Note that if a processed file contains more than one error, only the error that was first encountered on that file and currently has a status of ready to retry is listed in the document error view.
- **Mass Actions:** various actions that you can perform on selected errors.



Review the Document Error Layout

The document error layout provides more details about the file that has experienced errors. You can view the error layout by selecting the Current Error Message. You can select how to handle the error on the Error Actions console.

Options on the Error Actions console

- **Retry:** retries all the errors attached to the document.
- **Ignore:** marks Ready-to-Retry errors as Ignored.
- **Edit Notes:** brings up a window in which you can enter notes to be applied to the error.

Key areas of the layout

- **Document Error Details Tab:** provides information on the Processing Data Source, Processing Set, and the Current Category of the error.
- **Other Details Tab:** provides information on the processing file ID and the Processing File Path.
- **Processing Errors Object:** provides access to the processing errors view by selecting the Error Message field and additional details about an individual processing error.

Document Errors Layout – Document Error Details

Document Error Details
Other Details

Processing Data Source:

Processing Set:

Custodian:

Source Location:

File ID:

Current Category:

Number of Retries:

Current Status:

Document:

Notes:

ERROR ACTIONS

Retry

Ignore

Edit Notes

Processing Errors Items - 2 (of 2) ⏪ ⏩ ⏴ ⏵

	Message	Identified file ...	Processing p...	Error status	Error created...	Notes
<input type="checkbox"/>	(All) (All)	(All)	(All)	(All)	(All)	(All)
<input type="checkbox"/>	Edit Error occurred when attempting to open the Excel workbook. The workbook may be password protected.	Microsoft Excel 97-2003 Worksheet	Extracting data	Ready to retry	5/18/2018 5:50 PM	
<input type="checkbox"/>	Edit Error occurred when attempting to open the Excel workbook. The workbook may be password protected.	Microsoft Excel 97-2003 Worksheet	Extracting data	Retried	1/7/2017 1:14 AM	

0 Selected Item(s) Select Page Size:

Document Error Layout – Other Details Tab

Document Error Details Other Details

Storage ID: 729470

Document File Location: \\files\T002\Files\EDDS1084499\Processing\1172185\INV1084499\SOURCE\364\729470.XLS

Processing Errors

Items 1 - 2 (of 2)

Message	Identified file ...	Processing p...	Error status	Error created...	Notes
<input type="checkbox"/> Edit Error occurred when attempting to open the Excel workbook. The workbook may be password protected.	Microsoft Excel 97-2003 Worksheet	Extracting data	Ready to retry	5/18/2018 5:50 PM	
<input type="checkbox"/> Edit Error occurred when attempting to open the Excel workbook. The workbook may be password protected.	Microsoft Excel 97-2003 Worksheet	Extracting data	Retried	1/7/2017 1:14 AM	

0 Selected Item(s) Select Page Size: 10

ERROR ACTIONS

Retry

Ignore

Edit Notes

Review the Processing Error Layout

The Processing Errors layout provides more in-depth information on the file that has encountered an error and the file's location within Relativity Processing. You can reach this layout by selecting the Error Message field in the Processing Errors object on the Document Errors Tab.

Key areas of the Processing Errors Layout

- **General Tab:**
 - **Error Information:** provides more details about the error including the Message and Name of the error.
 - **Document Information:** provides more details about the document and the location of the document in the Processing engine as well. You can use the path fields to navigate to the document's location in Relativity and in the processing data source.
- **Advanced Tab:** provides the stack trace field for the error that you can share with Relativity Support.

GENERAL **ADVANCED****ERROR INFORMATION**

File ID: 887812

Message: Error occurred when attempting to open the Excel workbook. The workbook may be password protected.

Name: 0000000000001091257

Error status: Ready to retry

Error type: Document

Error created on: 5/18/2018 5:50 PM

System Last Modified On: 5/18/2018 5:50 PM

System Last Modified By: Service Account, Relativity

Notes:

DOCUMENT INFORMATION

Document file location

Path to document with error: \\files\T002\Files\EDDS1084499\Processing\1172185\INV1084499\SOURCE\364\729470.XLS

Document folder location

Path to parent folder of document with error: \\files\T002\Files\EDDS1084499\Processing\1172185\INV1084499\SOURCE\364\

Virtual location: \\Enron Custodians\Custodians\louise_kitchen\louise_kitchen_001_1_1_1.pst\kitchen-IE\Merge - Kitchen, Louise\Americas\Asset Marketing\00000000E224E1659A617040A0AAB75D509947F744302100.MSG

Source location:

Relativity Document Identifier

Link to document with error in Viewer: REL0000613757.0001

Relativity Parent Document Identifier

Link to parent document with error in Viewer: REL0000613757

Identified file type: Microsoft Excel 97-2003 Worksheet

Artifact ID: 3296112

Container ID:

Original group ID: 63354000

PROCESSING INFORMATION

Processing Set: EPC-REV001

Processing Data Source: 1172185

Processing phase: Extracting data

Resources

Documentation:

- [Processing Error Workflow](#)
- [Resolving Common Processing Errors](#)

Webinars:

- [Processing Error Workflow](#)