

Post-installation verification test

Server 2024

Contents

[Overview 4](#_Toc126683097)

[Opening Relativity and verifying licenses 4](#_Toc126683098)

[Setting up the smoke environment 5](#_Toc126683099)

[Adding the Smoke client, matter, and group 5](#_Toc126683100)

[Adding and logging in as the Smoke user 6](#_Toc126683101)

[Creating the Smoke workspace 8](#_Toc126683102)

[Downloading and importing test data 10](#_Toc126683103)

[Creating workspace elements 12](#_Toc126683104)

[Creating a new search and imaging profile 14](#_Toc126683105)

[Image a document on the fly 18](#_Toc126683106)

[Simple file upload 18](#_Toc126683107)

[Performing searches 19](#_Toc126683108)

[Processing 20](#_Toc126683109)

[Search terms reports 34](#_Toc126683110)

[Review 35](#_Toc126683111)

[Analytics 38](#_Toc126683112)

[Structured Analytics 39](#_Toc126683113)

[Email threading 42](#_Toc126683114)

[Conceptual Analytics 43](#_Toc126683115)

[Active Learning 44](#_Toc126683116)

[Productions 46](#_Toc126683117)

[Creating and running a production 46](#_Toc126683118)

[Creating a new OCR set 50](#_Toc126683119)

[Case Dynamics 52](#_Toc126683120)

[Using Case Dynamics 52](#_Toc126683121)

[Creating dynamic objects 56](#_Toc126683122)

[Using the Relativity Dynamic Objects 56](#_Toc126683123)

[Widgets 57](#_Toc126683124)

[Relativity Integration Points 58](#_Toc126683125)

[Transcripts 61](#_Toc126683126)

[Using the Transcripts application 61](#_Toc126683127)

[Delete Smoke workspace components 64](#_Toc126683128)

# Overview

To verify that your Relativity environment is functioning properly after the initial installation, complete the following post-installation verification tasks. This is also known as a smoke test, which assists you in verifying that core Relativity functionality works correctly. You can use this guide as a top-to-bottom test, performing each test in order, or you can test only specific features within your environment, such as Analytics or Processing. Then, you can mark the Done column next to each procedure when it is complete.

This document assumes you are:

* Working in the newest version of Relativity, which includes template data that matches the information in this document.
* Using the new UI framework that is turned on by default in Server 2024.

**Note:** For some of the features included in this document, you will find a link to the corresponding feature topic in our documentation. However, many procedures do not have a corresponding topic or are specific to this post-installation verification test. In these scenarios, you can follow the instructions in the table below.

# Opening Relativity and verifying licenses

|  |  |  |  |
| --- | --- | --- | --- |
| Procedure | Documentation | Expected result | Done |
| Logging in to Relativity. | 1. Navigate to the Relativity login page: http://VM-INSTANCE-NAME/Relativity via one of the following browsers: Internet Explorer, Google Chrome, Firefox, or Safari. 2. This login can change. Verify the credentials of the machine you are testing. 3. Log in to Relativity using a system admin account. | The login credentials operate successfully. |  |
| Verify licensing remains unchanged. | Ensure that an **ALERT** message does not appear on the Instance Details tab. | No **ALERT** messages appear. |  |
| Verify agents. | Navigate to the **Agents** tab.  Refer to the list of agents here: <https://help.relativity.com/Server2024/Content/System_Guides/Agents_Guide/Agents.htm#List_of_agents>. For the purposes of this document, only verify the core Relativity feature agents as you may not have the other non-core application-specific agents installed. | All agents are present and running, the Enabled field is set to **Yes**. |  |
| Verify server registration. | Verify that all servers are registered on the **Servers** tab. Servers are named after the SQL instance, not as *localhost*.  Check to make sure your environment contains all the servers referred to here: <https://help.relativity.com/Server2024/Content/Relativity/Servers/Servers.htm>.  When you upgrade Relativity, some servers will not list the updated version number until you start them. This means that if a server lists an old version number after you upgrade, click the **Edit** icon next to the server name and change its **Status** field to **Active**. | All servers are present and upgraded to the correct version. Refer to the value listed in the Version field to validate. |  |

# Setting up the smoke environment

## Adding the Smoke client, matter, and group

|  |  |  |  |
| --- | --- | --- | --- |
| Procedure | Documentation | Expected result | Done |
| Create the Smoke client. | 1. Navigate to the **Clients** tab. 2. Click **New Client.** 3. Enter the following field information:    * **Name**—Smoke Client    * **Client Number**—Today’s date (MMDDYYYY)    * **Status**—Active 4. Click **Save**. | **Smoke Client** appears in the Clients list. |  |
| Create the Smoke matter. | 1. Navigate to the **Matters** tab. 2. Click **New Matter**. 3. Enter the following field information:    * **Name**—Smoke Matter    * **Matter Number**—Today’s date (MMDDYYYY)    * **Status**—Active    * **Client**—Smoke Client 4. Click **Save**. | **Smoke Matter** appears in the Matters list. |  |
| Create the Smoke group. | 1. Navigate to the **Groups** tab. 2. Click **New Group.** 3. Enter the following field information:    * **Name**—Smoke Group    * **Client**—Smoke Client 4. Click **Save**. | **Smoke Group** appears in the Groups list. |  |

## Adding and logging in as the Smoke user

|  |  |  |  |
| --- | --- | --- | --- |
| Procedure | Documentation | Expected result | Done |
| Add the AdminsCanSetPasswords instance setting. | 1. Navigate to the **Instance Settings** tab. 2. Click **New Instance Setting.** 3. Enter the following field information:    * **Name**—AdminsCanSetPasswords    * **Section**—Relativity.Authentication    * **Value Type**—True/False    * **Value**—True    * Leave the remaining fields default. 4. Click **Save**. | **AdminsCanSetPasswords** appears in the instance settings list with value set to True. |  |
| Create the Smoke user. | 1. Navigate to the **Users** tab. 2. Click **New User.** 3. Enter the following field information:    * **First Name**—Smoke    * **Last Name**—User    * **Email Address**—[Smokeuser@relativity.com](mailto:Smokeuser@relativity.com)    * **Type**—Internal    * **Client**—Smoke Client    * **Relativity Access**—Enabled    * **Saved Search Owner**—Public    * Leave the remaining fields default. 4. Click **Save**. A modal displays. Click **Yes** on the modal. 5. Navigate to the Login method (User) section and click **New**. 6. Enter the following in the Login Method Information section:    * **Provider**—Default Password Provider    * **Enable Two-factor Authentication**—Disabled 7. Enter the following in the Default Password Settings section:    * **Can Change Password**—Enabled    * **Require Change Password On Next Login**—Disabled    * **Maximum Password Age**—Enabled    * **Days**—100    * **Set Password for User**—Enabled    * **Password**—Create a password    * **Retype Password**—Retype the password you created. 8. Click **Save**. | **User, Smoke** appears in the Users list. |  |
| Add the Smoke user to the group. | 1. Navigate to the **Groups** tab and select the **System Administrators** group. 2. Click **Add** on the Users section. 3. Select the following user and click the Move selected left to right icon:    * Smoke User 4. Click **Apply**. | **Smoke User** appears in the Users section. |  |

## Creating the Smoke workspace

|  |  |  |  |
| --- | --- | --- | --- |
| Procedure | Documentation | Expected result | Done |
| Log in as the Smoke User. | Log in to Relativity using the credentials for Smoke User:   * **Email address**—[Smokeuser@relativity.com](mailto:Smokeuser@relativity.com) * **Password**—Use the password you assigned the Smoke user above. | Log in credentials operate successfully. |  |
| Create the Smoke workspace. | 1. Navigate to the **Workspaces** tab. 2. Click **New Workspace**. 3. Enter the following field information in the Workspace Information section:    * **Name**—Smoke Workspace    * **Matter**—Smoke Matter    * **Client**—Smoke Client    * **Template Workspace**—Relativity Starter Template 4. Enter the following field information in the Advanced Settings section:    * **Status**—Active 5. Enter the following field information in the Resource Information section:    * **Resource Pool**—Default    * **Database Location**—Default    * **Default File Repository**—Select the available repository.    * **Default Cache Location**—Select the available cache location.    * **Download Handler URL**—Default 6. Click **Save**. | **Smoke Workspace** appears in the Workspaces list. |  |
| Favorite the Smoke workspace. | 1. Navigate to the **Workspaces** tab and select the **Smoke Workspace** from the list. 2. Navigate to the **Documents** tab. 3. Click once on the Favorites star icon to add Documents (Folders) – Smoke Workspace to Favorites. | The star turns gold after you add the Documents tab. |  |
| Create the Parent Document ID field, if not already created. | 1. Navigate to the **Fields** tab. 2. Click **New Field**. 3. Enter the following field information:    * **Name**—Parent Document ID    * **Object Type**—Document    * **Field Type**—Fixed-Length Text    * **Maximum Length**—255    * **Required**—Disabled    * **Enable Group By**—Enabled    * **Enable Pivot**—Enabled    * Leave the remaining fields default. 4. Click **Save**. | **Parent Document ID** appears in the Fields list. |  |
| Add the Smoke group. | 1. Navigate to the **Workspace Details** tab. 2. Click **Manage Workspace Permissions** on the Relativity Utilities console. 3. Click **Add/Remove Groups** on the Group Management window. 4. Select **Smoke Group**. 5. Click **Add** andthen **Save**. | A message briefly displays confirming that the group was added successfully. Alternatively, you can repeat steps 2-3 to confirm the group was added. |  |
| Preview the Smoke group. | 1. Click **Manage Workspace Permissions** on the Relativity Utilities console. 2. Click **Preview** for the Smoke Group. 3. Verify expected results. 4. Click **Exit Preview** to leave the security preview mode and return to the **Workspace Details** tab. | A notification at the top of Relativity displays: **Previewing as group: Smoke Group**.  Only the **Documents** tab displays while previewing security. |  |

## Downloading and importing test data

When importing documents, ensure that the test data exists in a location that the Relativity Desktop Client (RDC) has access to. The test data is also used to check Processing Discovery functionality. For that section of the test, there are steps that assume the test data is in a folder named **Fileshare\SmokeTestData** on the Web Server. You can change the Processing test steps accordingly to reflect the location where you saved the test data.

|  |  |  |  |
| --- | --- | --- | --- |
| Procedure | Documentation | Expected result | Done |
| Download the test data. | 1. Download the **Post Installation Verification Test Data.zip** file from the [Post-installation verification test](https://help.relativity.com/Server2024/Content/Installing_and_Upgrading/Post-installation_verification_test/Post-installation_verification_test.htm) page on the Relativity Documentation site. 2. Unzip the contents of the test data zip file. | Smoke data is downloaded and unzipped to a location the RDC has access to. |  |
| Import the test data. | 1. Open the Relativity Desktop Client. 2. Log in using the system admin credentials. 3. Set the WebAPI path to the smoke environment using the following format: https://VM-INSTANCE-NAME/RelativityWebAPI/. 4. Select **Smoke Workspace** and click **OK**. 5. Right-click on the workspace name and select **Import | Load File…** 6. Click the **Load File** field ellipsis button . 7. Select the **Salt-v-Pepper (US date format).dat** or **Salt-v-Pepper (UK date format).dat** document load file in the SmokeTestData folder. 8. Click **Open**. 9. Select the following options on the **Load File** tab:    * **File Encoding**—Western European (Windows)    * **Column**—I (ASCII:124)    * **Quote**—^ (ASCII:094) 10. Click on the **Field Map** tab and map the following fields:     * Control Number     * Extracted Text     * Email From     * Email To     * Email CC     * Email Subject     * Date Sent     * Filename     * Group Identifier     * Parent Document ID     * Conversation Index, could also be Conversation ID 11. Select the following field options on the **Field Map** tab:     * **Overwrite** - Append Only     * **Folder info**       1. Select the **Folder Information Column** option.       2. Select **Folder Path** from the drop-down menu.     * **Native File Behavior**       1. Select the **Load Native Files** option.       2. Select **FILE\_PATH** from the drop-down menu.     * **Extracted Text**       1. Select the **Cell contains file location** option.       2. Select **Western European (Windows)** from the Encoding for undetectable files drop-down menu. 12. Click **Import** and select **Import File…**. When the RDC notifies you of the number of folders the load file creates on import, click **OK**. 13. Click **Close** when the import completes. | Folders and documents are imported and appear on the Documents tab in Relativity. |  |

## Creating workspace elements

|  |  |  |  |
| --- | --- | --- | --- |
| Procedure | Documentation | Expected result | Done |
| Create a new field. | 1. Navigate to the **Fields** tab. 2. Click **New Field**. 3. Enter the following field information:    * **Name**—Smoke Designation    * **Object Type**—Document    * **Field Type**—Single Choice    * **Required**—Disabled    * **Enable Group By**—Enabled    * **Enable Pivot**—Enabled    * Leave the remaining fields default. 4. Click **Save**. | The new **Smoke Designation** field appears in the Fields list. |  |
| Create new choices. | 1. Navigate to the **Fields** tab. 2. Select the **Smoke Designation** field. 3. In the Choices section, click **Add Choice**. 4. Enter **Smoke Responsive** in the textbox and press **Enter** on your keyboard to create the choice. 5. Hover your cursor over Smoke Responsive’s row in the Choices section and select **Details**. The Choice Details modal displays. 6. In the Choice Details modal, enter the following:    * **Order**—10    * **Keyboard Shortcut** - Click **Select** and choose the following options:      1. **Control**      2. **Alt**      3. **Main Key**—R    * Leave the remaining fields default. 7. Click **Apply** and then **Save**. 8. Click **Add Choice**, enter **Smoke Non-Responsive** in the textbox, and press **Enter** on your keyboard to create the choice. | The new choices appear on the field. |  |
| Create a new layout. | 1. Navigate to the **Layouts** tab. 2. Click **New Layout**. 3. Enter the following field information:    * **Object Type**—Document    * **Name**—Smoke Layout    * **Order**—10    * **Enable Copy From Previous**—Enabled 4. Click **Save**. 5. Click the **Build Layout** button on the Layout console to the right. 6. From the Layout Options console > Fields section, click and drag the **Smoke** **Designation** field to the Default Category under the default Control Number field. 7. Click **Save and Close**. | The new **Smoke Layout** layout appears in the Layouts list. |  |
| Create a new markup set. | 1. Navigate to the **Markup Sets** tab. 2. Click **New Markup Set**. 3. Enter the following field information:    * **Name**—Smoke Markup Set    * **Order**—10    * **Redaction Text**—Smoke Redaction Text 4. Click **Save**. | The new **Smoke Markup Set** markup set appears in the Markup Sets list. |  |

# Creating a new search and imaging profile

|  |  |  |  |
| --- | --- | --- | --- |
| Procedure | Documentation | Expected result | Done |
| Create a new saved search. | 1. Navigate to the **Documents** tab, click  to open the Saved Searches browser. 2. Click **Create New Search**. 3. Enter the following field information:    * **Name**—Smoke Search 1    * **Owner**—Public    * **Scope**—Selected Folders      + Click **Select** and select the **HernandezJuan** folder and its children.    * **Fields**—Move “Has Images” and “Extracted Text” to the right. 4. Click **Save & Search**. | Four documents return in the search results. |  |
| Create a new imaging profile. | 1. Navigate to the **Imaging Profiles** tab. 2. Click **New Imaging Profile**. 3. Set the following fields in the Imaging Profile section:    * **Name** **profile**—Smoke Imaging Profile    * **Type**—Native 4. Set the following fields in the Basic Imaging options section:    * **Image output quality (DPI)** —300    * **Image format**—TIFF    * **Image size**—Original Setting 5. Set the following fields in the Native Imaging options section:    * **Image output quality (DPI)** —300    * **Image format**—JPEG 6. Set the following fields in the Spreadsheet options section:    * **Paper size/orientation**—Original Setting    * **Page order**—Original Setting    * **Print area**—Original Setting    * **Include row and column headings**—Original Setting    * **Include headers and footers**—Original Setting    * **Include gridlines**—Original Setting    * **Show track changes in spreadsheet**—Disabled    * **Include comments**—Enabled    * **Include borders**—Disabled    * **Show hidden worksheets**—Enabled 7. Set the following fields in the Advanced options section:    * **Hide and page-break after \_ consecutive blank rows**—5 8. Set the following fields in the Email options section:    * **Orientation**—Portrait    * **Resize images to fit page**—Enabled    * **Resize tables to fit page**—Enabled    * **Split tables to fit page width**—Enabled    * **Download images from internet**—Disabled    * **Detect character encoding**—Disabled    * **Clear indentations**—Enabled    * **Display SMTP addresses**—Disabled    * **Show message type in header**—Enabled 9. Set the following fields in the Word processing options section:    * **Show track changes**—Disabled    * **Page Orientation**—Original Setting 10. Set the following option in the Presentation options section:     * **Show speaker notes**—Enabled 11. Set the following option in the HTML options section:     * **Remove non-breaking space (NBSP) codes**—Enabled 12. Click **Save**. | The new imaging profile appears in the Imaging Profiles list.  If the worker manager server is not installed on your machine, the default layout for creating a profile is the Basic Imaging Profile Layout. If you attempt to switch to the Native Imaging Profile Layout, you are directed back to the basic imaging layout. If the worker manager server is installed on your machine, the default layout for creating a profile is the Native Imaging Profile Layout. If you attempt to switch to the Basic Imaging Profile Layout you are directed back to the native imaging layout. |  |
| Create a new imaging set. | 1. Navigate to the **Imaging Sets** tab. 2. Click **New Imaging Set**. 3. Enter the following field information:    * **Name**—Smoke Imaging Set    * **Data Source**—Smoke Search 1    * **Imaging Profile**—Smoke Imaging Profile 4. Click **Save.** | The new imaging set appears in the Imaging Sets list. |  |
| Image the documents using native imaging. | 1. Navigate to the **Imaging Sets** tab and select **Smoke Imaging Set** from the list. 2. Click **Image Documents** on the Imaging Set console. 3. Click **Ok** on the Image Documents Options dialog box. 4. Click **Refresh Page** until the Status is Completed. | When you open a document from Smoke Search 1, the images render properly in the Image Viewer. You can access the saved search from the Documents tab. |  |
| Delete images. | 1. Navigate to the **Documents** tab and select **Smoke Search 1**. 2. Select the documents you imaged. 3. Click on the mass operations button and select **Delete**. The Delete Details modal displays. 4. Select **Only image(s)**. 5. Click **Delete**. | Open a document that has had its image removed. **The document is out of date** message may display. Click **Reload Document**. The document no longer has an image and the Image Viewer is updated to No Image. |  |
| Image the documents using basic imaging. | 1. Navigate to the **Imaging Profiles** tab. 2. Click the **Edit** icon next to the Smoke Imaging Profile. 3. Change the Type field to **Basic**. 4. Click **Save**. 5. Navigate to the **Imaging Sets** tab and select the **Smoke Imaging Set**. 6. Click **Image Documents** on the Imaging Set console. 7. Click **Ok**. 8. Click **Refresh Page** until the Status is Completed. 9. Navigate to the **Smoke Search 1** saved search on the Documents tab. | The images render properly in the Image Viewer.  If the images do not appear in the Viewer, try refreshing your browser or navigating to another workspace and then try to open an imaged document in the Smoke Workspace again. |  |

# Image a document on the fly

|  |  |  |  |
| --- | --- | --- | --- |
| Procedure | Documentation | Expected result | Done |
| Image a document on the fly in the Viewer. | 1. Open a document that has not been imaged in the Native Viewer. 2. Click on  to the right of the document’s name to view the Document Actions menu. 3. Hover your cursor over **Image on the Fly** and select an image profile. The document is imaged and opened in the Image Viewer. | The image is visible in the Image Viewer. |  |

# Simple file upload

|  |  |  |  |
| --- | --- | --- | --- |
| Procedure | Documentation | Expected result | Done |
| Uploading a document. | 1. Navigate to the **Documents** tab. 2. Click the **New Document** icon near the View bar. The New Documents modal displays. 3. Drag and drop up to 20 files into the New Documents modal or click on the modal to select files that you want to upload. The selected files will display in a list. 4. Click **Upload**. | A green check mark appears next to the file name of a successfully uploaded document. The progress bar is tracking the progress of all the files selected. |  |

# Performing searches

|  |  |  |  |
| --- | --- | --- | --- |
| Procedure | Documentation | Expected result | Done |
| Perform a keyword search. | 1. Navigate to the **Documents** tab and select the **Folders** browser icon. 2. Select the **HernandezJuan** folder and run a keyword search for **Delgado Lydia**. | Two documents return. |  |
| Create a new dtSearch index. | 1. Navigate to the **Search Indexes** tab. 2. Click **New dtSearch Index**. 3. Enter the following field information:    * **Name**—Smoke dtSearch    * **Searchable Set**—Smoke Search 1    * **Email notification recipients**—Enter a valid email address that can receive the notification.    * Verify the Index share is set to your dtSearch directory using the UNC path (i.e. [\\VM-NAME-HERE\DTSearch\](file:///\\VM-NAME-HERE\DTSearch\))    * Leave the remaining fields default. 4. Click **Save**. 5. Click **Build Full** **Index** on the dtSearch Index console. 6. Click **Yes**. Indexing progress displays. | The index is complete and displays a Status value of **Active-indexed** and a Document Breakdown value showing the number of documents indexed. |  |
| Verify dtSearch index creation is successful. | 1. Navigate to the **Folder Browser** on the **Documents** tab. 2. Select the **HernandezJuan** folder. 3. Verify the following:    * The View is **Documents**.    * The folder scope is **HernandezJuan** and Subfolders.    * The Related Items drop-down displays **+ No Related Items**— do not Include Family.    * The previous search terms are cleared. 4. Click on the Index drop-down menu and select **Smoke dtSearch.** 5. Enter and run the following proximity search against the new dtSearch index: **attached w/5 documents**. | One document returns.  Open the document in the Viewer to verify the search terms are highlighted. |  |
| Search for a term using the dtSearch dictionary | 1. Click on the dtSearch filter condition you just set up in the search panel on the left to launch the Index Search modal. 2. Click the **Dictionary** link next to the Search Terms field. 3. Type **attach** in the Dictionary search pop-up window. 4. Click **Search**. One word in one document returns. 5. Select **Enable stemming** and click **Search**. Two words in two documents return. 6. Set the fuzziness level to 6 and click **Search**. | One word in one document returns in addition to the previous results. |  |

# Processing

The following steps guide you through importing and verifying the functionality of the Processing application.

|  |  |  |  |
| --- | --- | --- | --- |
| Procedure | Documentation | Expected result | Done |
| Import the Processing application. | 1. From the Smoke Workspace, use the search bar to navigate to the **Relativity Applications** tab. 2. Click **New Relativity Application**. 3. Enter the following field information:    * **Application Type**—Select from the Application Library.    * **Choose from Application Library**—Processing. Click **OK**. The page refreshes. 4. Click **Import**. After the import completes, confirm you see the Processing object in the Relativity Applications list. | The applications list displays the Processing application imported in this step.  For product documentation, see [Installing applications](https://help.relativity.com/Server2024/Content/Relativity/Applications/Installing_applications.htm). |  |
| Generate the Processing license. | You are unable to process data in Relativity if any of the following conditions are true:   * You do not have a processing license associated with your environment. * The processing license associated with your environment is invalid. * The processing license associated with your environment is expired. * The worker manager server associated with the resource pool is not included in the processing license.   To generate a license request for processing:   1. Log in to Relativity and use the search bar to navigate to the **License** tab. 2. Click **Processing**. 3. Click **Request License Key** to display a pop-up with the request key. 4. Select and copy the **Request Key** text. 5. Paste the text into an email. Format your email as follows:    * **Email To**—[support@relativity.com](mailto:support@relativity.com).    * **Subject**—Request Processing License Key.    * **Email Body**—contains the copied request key text. Client Services will send you an email with your activation key. 6. After you receive your activation key, use the search bar to navigate once again to the **License** tab. 7. Edit the **Processing** record. 8. Click **Apply License Key** to display a pop-up window.. 9. Copy the activation key from your email, then paste it into the **License Key** text box. 10. Click **Apply**. The License Details section of the tab automatically displays your contractual information. | After Relativity processes your request key, you receive an email with your activation key.  For product documentation, see [Licensing an application](https://help.relativity.com/Server2024/Content/Installing_and_Upgrading/Licensing.htm#Obtainin). |  |
| Create a choice for processing source location; add the processing source location to the resource pool. | To create a choice for the Processing Source Location field:   1. In your File Explorer, locate the folder containing the files that you intend to publish. Right-click the folder and select **Properties**. 2. In the Properties window, select the **Sharing** tab. 3. Click the **Share** button in the Network File and Folder Sharing section. 4. In the File Sharing window, add the appropriate user and click the **Share** button. 5. Return to the Sharing tab in the Properties window and copy the folder path displayed in the **Network Path** field. When you create the corresponding choice in Relativity, you will use this path as the name of that choice. 6. Log in to Relativity and use the search bar to navigate to the **Choices** tab. 7. Click **New Choice**. 8. Enter the following values for the required fields:    * **Field**—select **Processing Source Location**. The Processing Source Location field is automatically created for you.    * **Name**—the name of the repository containing the files you want to process. Enter an absolute network path (UNC) for the Name field. For example, [\\pt-func-file01.example.com\FileShare\Custodian\MJones](file://pt-func-file01.example.com/FileShare/Custodian/MJones). The Relativity Service Account must have read access to the processing source location.    * **Order**—10. 9. Click **Save**.   Add the source location to the resource pool.   1. Use the search bar to navigate to the **Resource Pools** tab. 2. Click the resource pool used for Smoke Workspace. 3. In the Processing Source Location section, click **Add**. 4. Select the location choice created in the prior steps. 5. Use the arrow in the center of the screen to add the location. Click **Apply**. 6. Return to the **Workspaces** screen. 7. Open the **Smoke Workspace**, then click the **Documents** tab. 8. Open the **Folder** browser. 9. Right-click root folder and click **Create**. 10. Enter **Smoke Processing Destination** as the new folder name; click <ENTER> to set the name. | The Choices list displays the choice created in this step; the source location is attached to the appropriate resource pool.  For product documentation, see [Creating a choice for the processing source location](https://help.relativity.com/Server2024/Content/Relativity/Processing/Installing_and_configuring_processing.htm#Creating_a_choice_for_the_processing_source_location). |  |
| Designate a worker for processing. | To designate a worker for processing:   1. Use the search bar to navigate to the **Servers** tab. 2. From the list of servers, **edit** the **Worker** server you will use for processing jobs. 3. Navigate to the **Worker Designated Work** field. 4. Check the box next to the **Processing** choice if it is not already selected. 5. Click **Save**.   Manually install Processing agents. Optional. The Processing application uses the following agents:   * **Server Manager**—retrieves version information from the worker manager server and updates the processing queue tab with this information. * **Processing Set Manager**—manages the running of processing sets, retrieves errors encountered while sets are running, picks up processing set deletion jobs, and submits them to the worker manager server.   When you install the Processing application, one of each of these agents is automatically included. If your workspace requires additional agents, you can add them manually. It is not mandatory to add additional agents.  To manually install processing agents:   1. Use the search bar to navigate to the **Agents** tab. 2. Click **New Agent**. 3. Complete the following fields:    * **Agent Type**—click to display a list of agents. Filter, then select one of the processing agents, and click **Set**.    * **Number of agents**—enter the number of agents you want to add.    * **Agent Server**—click to display a list of servers, then select a server and click **Set**. Select the agent server; do not select the processing worker or processing queue manager if displayed.    * **Run interval**—enter the interval, in seconds, at which the agent should check for available jobs.    * **Logging level of event details**—select either **Log critical errors only**, recommended, **Log warnings and errors**, or **Log all messages**.    * **Initial Status**—select **Yes.** 4. Click **Save**. | Processing is checked for the Worker Designated Work field on the worker server.  For product documentation, see [Worker manager server](https://help.relativity.com/Server2024/Content/Relativity/Processing/Installing_and_configuring_processing.htm#Worker_manager_server). |  |
| Create a new entity. | 1. From the **Workspaces** screen, open **Smoke Workspace**. 2. Use the search bar to navigate to the **Entities** tab. 3. Click **New Entity** and enter the following field information:    * **Custodian Type**—Person    * **First Name**—Smoke    * **Last Name**—Custodian One    * **Classification**—Custodian – Processing 4. Click **Save and New** and enter the following field information:    * **First Name**—Smoke    * **Last Name**—Custodian Two    * **Classification**—Custodian – Processing 5. Click **Save and Back**. | The Entities list displays the two new entities created in this step.  For product documentation, see [Processing entities](https://help.relativity.com/Server2024/Content/Relativity/Entity_object/Entity_object.htm#Processing_entities). |  |
| Create a new processing profile. | 1. Use the search bar to navigate to the **Processing Profile** tab. 2. Click **New Processing Profile** and enter the following field information:    * **Name**—Smoke Processing Profile    * **Numbering Type**—Auto Number    * **Default document numbering prefix**—REL    * **Number of Digit**—10    * **Parent/Child Numbering**—Suffix Always    * **Delimiter**—period    * **DeNIST**—Yes      + If you do not have the latest NIST package installed on your Invariant Worker server, used to populate the NIST table, you cannot save the processing set created in the next step. As a work-around, set this value to No, then install the latest NIST package later.    * **DeNist Mode**—Do not break parent/child groups.    * **Default OCR languages**—English.    * **Default time zone**—(UTC) Coordinated Universal Time.    * **Include/Exclude**—No.    * **Extract children**—Yes.    * **When extracting children, do not extract**—MS Office embedded images.    * **Email Output**—MSG.    * **Excel Text Extraction Method**—Native.    * **Excel Header/Footer Extraction**—Do not extract.    * **PowerPoint Text Extraction Method**—Native.    * **Word Text Extraction Method**—Native.    * **OCR**—Disabled.    * **Deduplication method**—Global.    * **Propagate deduplication data**—No.    * **Auto publish set**—No.    * **Default destination folder**—SmokeWorkspace\Smoke Processing Destination.    * **Do you want to use source folder structure**—Yes. 3. Click **Save**. | The Processing Profile list displays the profile created in this step.  For product documentation, see [Processing profiles](https://help.relativity.com/Server2024/Content/Relativity/Processing/Processing_profiles.htm#Creating_or_editing_a_processing_profile). |  |
| Add a password to the Password Bank. | 1. Select the **Password Bank | Processing** tab**.** If necessary, use the search bar to navigate to the tab. 2. In the **Password Entry** section, click **New**. 3. Select **Passwords** from the **Type** drop-down menu. 4. Enter **Custodian One Passwords** in the description. 5. Enter **Relativity** in the **Password(s)** text box. 6. Click **Save**. | The Password Bank displays the password created in this step.  For product documentation, see [Creating or deleting a Password Bank entry](https://help.relativity.com/Server2024/Content/Relativity/Processing/Password_bank.htm#Creating_or_deleting_a_Password_Bank_entry). |  |
| Map processing fields. | 1. Use the search bar to navigate to the **Fields** tab. 2. Use the filter on the **Name** column to locate and edit the **Sort Date** field. 3. Click **Advanced Settings**. 4. Locate the **Source** control and click **Select**. 5. Use the filter for the Source Field name column to locate and select **Sort Date/Time**. 6. Click **Set**. 7. Click **Save and Back**. 8. Now you will map the Unified Title field to the Unified Title source. Use the filter on the **Name** column to locate and edit the **Unified Title** field. 9. Click **Advanced Settings**. 10. Locate the **Source** control and click **Select**. 11. Use the filter for the Source Field name column to locate and select **Unified Title**. 12. Click **Set**. 13. Click **Save and Back**. | The Sort date and Unified Title fields display mapped sources.  For product documentation, see [Mapping processing fields](https://help.relativity.com/Server2024/Content/Relativity/Processing/Mapping_processing_fields.htm). |  |
| Add a new processing set. | 1. Use the search bar to navigate to the **Processing Sets** tab. 2. Click **New Processing Set**. 3. Enter the following field information:    * **Name**—Smoke Processing Set    * **Processing Profile**—Smoke Processing Profile 4. Click **Save**.    * If you do not have the latest NIST package installed on your Invariant Worker server, used to populate the NIST table, you will see an error when you attempt to save the processing set. As a work-around, edit the Processing Profile and set the DeNIST value to No. 5. Click **New** in the Processing Data Source section. In this step, you add the Smoke Custodian One data source. 6. Enter the following field information:    * **Source path**—select the Custodian One folder in the Processing Source Location entered in the resource pool used for the Smoke Workspace.    * **Custodian**—Custodian One, Smoke    * **Destination Folder**—leave as root folder    * **Time Zone**—UTC Coordinated Universal Time    * **OCR languages**—English    * **Document numbering prefix**—REL    * **Start Number**—leave blank    * **Name**—Smoke Data Source    * **Order**—10 7. Click **Save and New**. In the next step, you add the Smoke Custodian Two custodian to the data source. 8. Enter the following field information:    * **Source path**—Select the Custodian Two folder in the Processing Source Location entered in the resource pool used for the Smoke Workspace.    * **Custodian**—Custodian Two, Smoke    * **Destination Folder**—leave as root folder    * **Time Zone**—UTC Coordinated Universal Time    * **OCR languages**—English    * **Document numbering prefix**—REL    * **Start Number**—leave blank    * **Name**—Smoke Data Source    * **Order**—10 9. Click **Save and Back**.   You are directed to the Processing Set Status screen. You can view the new data sources from the Processing Data Sources tab. | The Processing Sets list displays the processing set created in this step.  For product documentation, see [Creating a processing set](https://help.relativity.com/Server2024/Content/Relativity/Processing/Processing_sets.htm#Creating_a_processing_set). |  |
| Inventory files. | 1. If you are not already on the Processing Set Status screen, navigate to the Processing Sets list and click the **Smoke Processing Set**. 2. Click **Inventory Files** on the Processing Set console. 3. The inventory processing status displays as completed. In the image below, 31 files were inventoried; two files have unresolvable job errors.      1. Click **Filter Files** on the Processing Set console. 2. On the **Filters** layout, click **Enter Dates**. Enter a range that excludes at least one file from the data set. For this document, we removed the first date, which excluded two files. Click **Apply** for the date filter. Click **Apply** to apply the filter to the set. 3. In the **Inventory Progress** pane, confirm at least one file was excluded. 4. Click the **Smoke Processing Set** link at the top of the layout. 5. Click **Inventory Report** in the Process Set console. 6. Verify the **File Count Excluded by Filter** value matches the number of files excluded in the previous step. | The Processing Set Status pane shows the Inventory status as completed.  For product documentation, see [Running inventory](https://help.relativity.com/Server2024/Content/Relativity/Processing/Inventory.htm#Running_inventory). |  |
| Discover files. | 1. Click **Discover Files** on the Processing Set console. Click **Discover** on the confirmation pop-up dialog. 2. The Discover processing status displays as completed. In the image below, 33 files were discovered; two files have unresolvable job errors. | The Processing Set Status pane shows the Discovery status as completed.  For product documentation, see [Running file discovery](https://help.relativity.com/Server2024/Content/Relativity/Processing/Discovering_files.htm#Running_file_discovery). |  |
| Publish files. | 1. Click **Publish Files** on the Processing Set console. Click **Publish** on the confirmation window. 2. The Publish processing status displays as completed. In the image below, 28 files were published; five files are duplicates; two files have unresolvable job errors.      1. Navigate to the **Folders** browser on the **Documents** tab. 2. Select the **Smoke Processing Destination** folder. 3. Verify the number of documents matches the number of documents published in the previous step and the following fields have values. If necessary, edit the Documents view and add/move the columns so they are easier to view:    * Custodian    * Sort Date    * Unified Title | The Processing Set Status pane shows the Publish status as completed.  For product documentation, see [Running file publish](https://help.relativity.com/Server2024/Content/Relativity/Processing/Publishing_files.htm#Running_file_publish). |  |
| View the job status of processing jobs. | From the Home mode, use the search bar to navigate to the **Processing and Imaging Queue** tab. From this page, you can view active jobs and their processing status. |  |  |
| Review the processing set status | Verify the following:   1. Files Inventoried shows 31 files. 2. Files Discovered shows 33 files. 3. Filtered files shows 2 files. 4. Files Published shows 28 files. 5. Duplicate Files (Global) shows 5 files. 6. Unresolvable Job Errors shows 2 files. 7. Available to Retry File Errors shows 2 files. |  |  |

# Search terms reports

|  |  |  |  |
| --- | --- | --- | --- |
| Procedure | Documentation | Expected result | Done |
| Create a new Search Terms Report. | 1. Navigate to the **Search Term Reports** tab. 2. Click **New Search Terms Report**. 3. Enter the following field information:    * **Name**—Smoke STR    * **Index**—Smoke dtSearch    * **Searchable Set**—Smoke Search 1    * **Tag Hits**—Enabled    * **Calculate Unique Hits**—Enabled    * Leave all remaining fields as default. 4. Click **Save.** 5. Click **Add Terms**. 6. Enter the following new terms, each on a separate line:    * attached    * documents 7. Click **Add**. Both terms are displayed in the Terms section. 8. Select both search terms and click **Edit**. Select yellow as the background color and click **Save**. 9. Click **Run All Terms** on the Search Terms Report console. 10. Click **Accept**. | The Search Terms Report progress appears. When the report is complete, Relativity displays a Report Status: Completed, the Documents with Hits: 2, Number of Terms: 2, Documents with Hits + Relational Group: 0, and Documents in Searchable Set: 4.  You can view the documents that contain the term using the **Field Tree Browser** on the **Documents** tab. |  |

# Review

|  |  |  |  |
| --- | --- | --- | --- |
| Procedure | Documentation | Expected result | Done |
| Coding documents as responsive. | 1. Navigate to the **Documents** tab and open **JHERNANDE\_0000568** in the Viewer. 2. Select the **Smoke Layout** from the layouts drop-down menu on the right side of the Viewer. 3. Click **Edit**. 4. Select **Smoke Responsive** from the Smoke Designation field by using the keyboard shortcut you previously created. To use the shortcut, press **Ctrl + Alt and R** on your keyboard. 5. Click **Save**. | The file is properly coded as responsive. |  |
| Create a new summary report. | 1. Navigate to the **Summary Reports** tab. 2. Click **New Summary Report**. 3. Enter the following field information:    * **Name**—Smoke Summary Report    * **Report on Subfolders**—Yes    * **Columns – Add Columns** Smoke Designation (not set) and Smoke Designation: Smoke Responsive. 4. Click **OK**. 5. Click **Save**. | The summary report returns a count of 1 for the **Smoke Responsive** choice. |  |
| Create a new view to return responsive documents. | 1. Navigate to the **Views** tab. Alternatively, from the **Documents** tab, click on the Views drop-down menu and select **New View**. 2. Enter the following field information:    * **Object Type**—Document    * **Name**—Smoke Responsive Documents    * Leave all other settings as default. 3. Select the **Edit**, **Control Number**, **Smoke Designation**, and **Group Identifier** fields and click on the **Move Selected** icon. 4. Click the **Conditions** tab. 5. Click **Add Condition**. 6. Enter the following field information under Conditions:    * **Field**—Smoke Designation    * **Operator**—any of these    * **Add Condition**—Smoke Responsive 7. Click **Apply**. 8. Click **Save**. | Only the previously coded document displays in the Smoke Responsive Designation.  To validate the steps in this section, navigate to the **Documents** tab and select the **Smoke Responsive Designation** from the Views drop-down menu. |  |
| View responsive documents. | 1. Navigate to the **Documents** tab and select the **Folder Browser** in the upper-left. 2. Select the folder **HernandezJuan**. 3. Select **Smoke Responsive Documents** from the Views drop-down menu. 4. Verify that one coded document displays. 5. Change the related item list to **+Family** documents. Verify that three more documents return in the view.   If no documents return, change the view back to the default Documents view and perform the following steps:   1. Select the document that was coded as responsive and one additional document. 2. Select the **Replace** mass operation. 3. When the pop-up window appears, enter the following field information:    * **Field to Update**—Select the relational field for Family    * **Action**—Replace Entire Field    * **Update with**—Text    * **Text**—123   This process makes the two fields relational. If you followed the steps above, perform the following steps to verify:   1. Switch the view to **Smoke Responsive Documents**. 2. Change the related item list to **+ Family** documents. | The second document returns along with the responsive document. |  |
| Verify family documents display in the related documents pane. | 1. Click to open one of the documents from the **Smoke Responsive Documents** view in the Viewer. 2. Click the Family card in the bottom-right to expand it. | Four documents appear in the list. |  |
| Create a new batch set. | 1. Navigate to the **Batch Sets** tab. 2. Click **New Batch Set**. 3. Enter the following field information:    * **Name**—Smoke Batch Set    * **Maximum Batch Size**—3    * **Batch Prefix**—Smoke –    * **Batch Data Source**—Smoke Search 1    * Leave all remaining fields as default. 4. Click **Save**. 5. Click **Create Batches** on the Batch Set console. 6. Click **Create** in the Create Batches modal. Relativity creates two batches. 7. Click **Purge Batches** on the Batch Set console and then **Purge** in the Purge Batches modal. 8. Click **Edit**. 9. Enter the following field information:    * **Auto Batch**—Enabled    * **Minimum Batch Size**—1    * **Auto Create Rate (minutes)** —1 10. Click **Save**. 11. Click **Refresh Page** on the Batch Set console. | The Batch Set Batches section displays two batches. |  |
| Creating a persistent highlight set. | 1. Navigate to the **Persistent Highlight Sets** tab. 2. Click **New Persistent Highlight Set**. 3. Enter the following field information:    * **Name**—Smoke Persistent Highlight Set    * **Order**—10    * **Source**—Highlight Fields    * **Highlight Fields** - Click **Select**, select **STR – Smoke STR**, click the Move selected left to right icon, and click **Apply**. 4. Click **Save**. | The persistent highlight set is accessible in the persistent highlight sets list. |  |
| Verify the persistent highlight set functionality. | 1. Navigate to the **Documents** tab and select the **Field Tree Browser**. 2. Select the **Documents** view from the Views drop-down menu. 3. Click on **STR – Smoke STR** and select the first document in the list **JHERNANDE\_0000565**. 4. Click on the Persistent Highlighting icon. 5. Verify that the document has both attached and documents highlighted in yellow. 6. Click on the Smoke Persistent Highlight Set light bulb icon. | The text is no longer highlighted. |  |

# Analytics

Perform the following steps to bring Analytics into your environment and make it operational. Where necessary, make sure to select the data sources and other objects you created earlier as part of this post-installation verification test.

## Structured Analytics

|  |  |  |  |
| --- | --- | --- | --- |
| Procedure | Documentation | Expected result | Done |
| Install the Analytics application. | 1. Navigate to the **Applications Library** tab. 2. Select the **Analytics** application. 3. In the Workspaces Installed section, click **Select**. 4. Select **Smoke Workspace** and click the Move selected left to right icon, and click **Apply**. | The Smoke Workspace appears in the Workspaces Installed section. |  |
| Add the following structured analytics agents:   * Structured Analytics Manager * Structured Analytics Worker | <https://help.relativity.com/Server2024/Content/System_Guides/Agents_Guide/Adding_and_editing_agents.htm> | The agents appear in the agents list and the Enabled field displays **Yes**. |  |
| Edit the default Analytics profile. | 1. Navigate to the Smoke Workspace. 2. Navigate to the **Analytics Profile** tab. 3. Click to edit the **Default** analytics profile and enter the following field information:    * **Email from field**—Email From    * **Email to field**—Email To    * **Email cc field**—Email CC    * **Email bcc field**—Email BCC    * **Email subject field**—Email Subject    * **Email date sent field**—Date Sent    * **Parent Document ID field**—Parent Document ID    * **Attachment name field**—File Name    * **Conversation ID field**—Conversation Index 4. Click **Save**. | The default Analytics profile is updated and ready to be used. |  |
| Create Destination Email fields. | 1. Navigate to the **Fields** tab. 2. Click **New Field**. 3. Enter the following information in the Field Settings section:    * **Name**—Email Thread Group    * **Object Type**—Document    * **Field Type**—Fixed-Length Text 4. Click on theAdvanced Settings tab and enter the following information:    * **Relational**—Enabled 5. Click **Select** on the Relational Properties field. 6. Enter the following field information:    * **Friendly Name**—Email Thread Group    * **Import Behavior**—Leave blank values unchanged    * **Pane icon**—select and upload an icon. You can find icons in the test data set zip file.    * **Order**—10 7. Click **Apply**. 8. Click **Save and New**. 9. Enter the following information in the Field Settings section:    * **Name**—Email Duplicate ID    * **Object Type**—Document    * **Field Type**—Fixed-Length Text 10. Click on theAdvanced Settings tab and enter the following information:     * **Relational**—Enabled 11. Click **Select** on the Relational Properties field. 12. Enter the following field information:     * **Friendly Name**—Email Duplicate ID     * **Import Behavior**—Leave blank values unchanged     * **Pane icon**—select and upload an icon. You can find icons in the test data set zip file.     * **Order**—10 13. Click **Apply**. 14. Click **Save**. | The Destination Email fields display in the Fields list. |  |
| Create and run a structured analytics set with only email threading selected. | 1. Navigate to the **Structured Analytics Set** tab. 2. Click **New Structured Analytics Set**. 3. Enter the following field information:    * **Structured analytics set name**—Smoke Email Threading    * **Select document set to analyze**—All Documents    * **Select operations**—Email threading    * **Select profile for field mappings**—Default    * **Destination Email Thread Group**—Email Thread Group    * **Destination Email Duplicate ID**—Email Duplicate ID 4. Click **Save**. 5. Click **Run Structured Analytics** in the Structured Analytics Set console. 6. Select **All Documents**. 7. Click **Run**. | The Smoke Email Threading run is completed. The following results display:   * Inclusive Emails: 1078 * View Email Threading Summary is available in the Structured Analytics Set console. |  |
| View the email threading results. | Click **View Email Threading Summary**. | Email Threading Summary report opens and displays statistics related to the threading. The Emails with Attachments field on this summary report may display 0 as it relies on a tally between the Group ID and Parent Doc ID fields. |  |

## Email threading

|  |  |  |  |
| --- | --- | --- | --- |
| Procedure | Documentation | Expected result | Done |
| Create a view to display email threading. | 1. Navigate to the **Views** tab. 2. Click **New View**. 3. Enter the following information:    * **Object Type**—Document    * **Name**—Smoke Email Threading 4. On the **Fields** tab, select the following fields for the Smoke Email Threading structured analytics set:    * Edit    * Control Number    * <Structured Analytics Set prefix>::Email Threading Display    * <Structured Analytics Set prefix>::Email Thread Group    * <Structured Analytics Set prefix>::Email Threading ID    * <Structured Analytics Set prefix>::Inclusive Email    * <Structured Analytics Set prefix>:Inclusive Reason 5. Click **Save**. | The view is accessible from the views list and displays all appropriate fields when selected. |  |
| Test the email threading display. | 1. Navigate to the **Folder Browser** on the **Documents** tab. 2. Select the **Smoke Email Threading** view. 3. Open the first document in the Viewer. 4. Click  in the bottom-left of the Viewer. | Results display in the Email Thread Visualization. |  |

## Conceptual Analytics

|  |  |  |  |
| --- | --- | --- | --- |
| Procedure | Documentation | Expected result | Done |
| Create and build an Analytics conceptual index with Extracted Text Only as the Data Source. | 1. Navigate to the **Analytics Indexes** tab. 2. Click New **Analytics Index**. 3. Enter the following information in the Analytics Index Information section:    * **Name**—Smoke Analytics    * **Index Type**—Conceptual    * **Data Source**—Extracted Text Only    * **Analytics server**— select your analytics server from the drop-down list. 4. Enter the following information in the Advanced Settings section:    * **Optimize training set**—No    * Leave the remaining fields default. 5. Click **Save**. 6. Click **Run** in the Analytics Indexes console. | * The index status is active. * The Population Statistics modal displays the following statistics:   + Training Set: Searchable Set: 2,502 Document Errors: 0 |  |
| Run a concept search from the Viewer. | 1. Navigate to the **Documents** tab. 2. Select any document from the list. You may find it helpful to select or navigate to a document that has plenty of text. 3. Using your cursor, highlight 2-3 sentences in the document, right-click on the highlighted text, and select **Concept Search**. | The Concept Search card displays to the left of the Viewer. |  |
| Create a new cluster. | 1. Navigate to the **Analytics Indexes** tab. 2. Ensure that the **Documents** view is selected in the Views drop-down menu. 3. Select the **Smoke Workspace** folder in the Browser panel. 4. Click **+Condition**. 5. Select **(Index Search)**. 6. Select **Smoke Analytics** from the Index: drop-down menu. 7. Enter **power** in the Concepts: textbox and click **Apply**. 8. In the mass operations toolbar, ensure that **All X** is selected, click the mass operations button to expand it, and select **Cluster**. 9. Select **Create New Cluster** and enter the following information:    * **Name**—Smoke Cluster    * **Relativity Analytics Index**—Smoke Analytics 10. Click **Submit For Clustering**. | The documents are clustered based on terms.  To validate the steps in this section, navigate to the **Documents** tab and click on the **Clusters** icon in the Browser panel. Click **Visualize Cluster**. |  |

## Active Learning

|  |  |  |  |
| --- | --- | --- | --- |
| Procedure | Documentation | Expected result | Done |
| Install the Active Learning application. | 1. Navigate to the **Applications Library** tab. 2. Select the **Active Learning** application. 3. In the Workspaces Installed section, click **Select**. 4. Select **Smoke Workspace,** click the Move selected left to right icon, and click **Apply**. | The Active Learning application shows up in the applications list for the workspace. |  |
| Ensure your environment contains the following Active Learning agents:   * Relativity Analytics Index Manager * Analytics Index Progress Manager * Analytics Categorization Manager * Active Learning Manager (one per resource pool) * Active Learning Worker | <https://help.relativity.com/Server2024/Content/System_Guides/Agents_Guide/Adding_and_editing_agents.htm> | The agents appear in the agents list and the Enabled field displays **Yes**. |  |
| Create and build an Analytics classification index with Extracted Text Only as the Data Source. | 1. Navigate to the **Analytics Indexes** tab. 2. Click **New Analytics Index**. 3. Enter the following information in the Analytics Index Information section:    * **Name**—Smoke Classification    * **Index Type**—Classification    * **Data Source**—Extracted Text Only    * **Analytics server**— select your analytics server from the drop-down list. 4. Click **Save**. 5. Click **Run** in the Analytics Index console. | * Index Status is **Active** * Document Breakdown section reports the following statistics:   + Data Source: 2502   + Index Size: 2502 |  |
| Create an Active Learning project. | 1. Navigate to the **Active Learning Projects** tab. 2. Click **New Active Learning Project**. 3. Enter the following information:    * **Project Name**—Smoke Active Learning    * **Analytics Index (Classification)**—Select the Analytics classification index you created in the previous section.    * **Review Field**—Smoke Designation    * **Positive Choice**—Smoke Responsive    * **Negative Choice**—Smoke Non-Responsive    * **Suppress Duplicate Documents**—No    * **Reviewer Group**—Smoke Group 4. Click **Save**. | The project homepage displays. |  |

# Productions

## Creating and running a production

|  |  |  |  |
| --- | --- | --- | --- |
| Procedure | Documentation | Expected result | Done |
| Create a saved search. | 1. Navigate to the **Documents** tab, click on the Saved Searches browser, and click **Create New Search**. 2. Set the following field options:    * **Name**—Smoke Production Saved Search    * **Owner**—Select your current user. 3. Add the following conditions:    * **Add Condition**—Smoke Designation    * **Operator**—Any of these    * **Value**—Smoke Responsive 4. Add the following field:    * Custodian—Single Choice 5. Click **Save & Search**. | A saved search is created and the results are displayed in the Documents list. |  |
| Create a new production set. | 1. Navigate to the **Production Sets** tab. 2. Click **New Production**. 3. Enter the following field information in the Basic Settings section:    * **Name**—Smoke Production Set    * Leave the remaining fields in the Basic Settings section as default. 4. In the Number section, ensure **Page level numbering** is selected and enter the following field information:    * **Prefix**—Smoke    * **Start number**—1    * **Number of digits for document numbering**—5    * Leave the remaining fields as default. 5. Click **Save**. | A new production set is created and appears in the production set list. |  |
| Add a custom production placeholder. | 1. Navigate to the **Production Placeholder** tab. 2. Select **New Production Placeholder**. 3. Enter the following information:    * **Name**—Smoke Production Placeholder    * **Type**—Image    * **Placeholder**—Click **Select** and choose an image to serve as a placeholder. 4. Click **Save**. | A custom production placeholder is created and appears in the production placeholder list. |  |
| Add a production data source. | 1. Navigate to the **Production Sets** tab. 2. Select **Smoke Production Set**. 3. In the Production Data Source section, click **New**. 4. Enter the following information:    * **Name**—Smoke Data Source    * **Production Type**—Select Images and Natives    * **Document Source**—Smoke Production Saved Search    * **Use Image Placeholder**—When No Image Exists    * **Placeholder**—Smoke Placeholder    * **Burn Redactions**—Enabled    * **Markup Set**—Smoke Markup Set 5. Click **Save**. | A Production data source is added to the previously created production set. |  |
| Stage the production. | 1. From the **Production Sets** tab, select **Smoke Production Set**. 2. Click **Stage Production** in the Production Console. | In the Smoke Production Set section, the stage is marked completed. |  |
| Run the production. | Click **Run Production** in the Production Console. | In the Smoke Production Set section, the Produce and Brand are marked completed. |  |
| Export the production. | 1. Open the Relativity Desktop Client (RDC). 2. Select **Smoke Workspace**. 3. Navigate to **Tools** > **Export** > and select **Production Set**. 4. Select the Destination Files tab and enter the following field information:    * **Export Location**—Click the ellipsis and select a location on your workstation where you wish to export the production. Make sure you can find this location easily in order to verify the production.    * **Text and Native File Names**      + **Named after**—Begin production number    * **Image**      + **Export Images**—Checked      + **Data File Format**—Opticon      + **File Type**—Single-page TIF/JPG    * **Metadata**      + **Data File Format**—Concordance (.dat)      + **Data File Encoding**—Western European (Windows)      + Leave all other fields as default. 5. Click **File** > **Run** to start the export. | The production is exported to your workstation. |  |
| Copy the production set. | 1. Navigate to the **Production Sets** tab in Relativity. 2. Check the box next to Smoke Production Set. 3. Select **Copy** from the mass operations drop-down menu. 4. Click **Ok**. 5. Verify that **Smoke Production Set (1)** is created. | The Smoke Production Set is copied to the production set list. |  |
| Stage and run the copied production set. | 1. Navigate to the **Production Sets** tab. 2. Open **Smoke Production Set (1)**. 3. Click **Stage and Run Production** in the Production Console. 4. After the job finishes, click **View Documents** from the Production Console to verify that the job was successful. | The copied production set runs successfully and the responsive document displays in the results. |  |
| Delete the production. | 1. Navigate to the **Production Sets** tab. 2. Open the **Smoke Production Set**. 3. Click **Delete** followed by **Delete** again to delete the production set. | The original production set you created is deleted. |  |
| Verify the production deleted properly. | 1. Navigate to the **Saved Search Browser** on the **Documents** tab and select **Smoke Search 1**. 2. Click to open and view the first document. 3. Verify that the Productions Viewer is not available for this document. | The deletion of the production set has been verified. |  |

# Creating a new OCR set

|  |  |  |  |
| --- | --- | --- | --- |
| Procedure | Documentation | Expected result | Done |
| Ensure the OCR Job Manager and Worker agents exist in your environment. | <https://help.relativity.com/Server2024/Content/System_Guides/Agents_Guide/Adding_and_editing_agents.htm> | The OCR Job Manager and OCR Job Worker agents are present and enabled. |  |
| Create a new long text field. | 1. Navigate to the **Fields** tab. 2. Click **New Field**. 3. Enter the following information:    * **Name**—Smoke OCR Destination    * **Object Type**—Document    * **Field Type**—Long Text 4. Click **Save**. | The new **Smoke OCR Destination** field is created for use with an OCR set. |  |
| Create and run a new OCR set. | 1. Navigate to the **OCR Sets** tab. 2. Select **New OCR Set**. 3. Enter the following information:    * **Name**—Smoke OCR Set    * **OCR Profile**—Standard OCR    * **Destination Field**—Smoke OCR Destination    * **Saved Search**—Smoke Search 1 4. Click **Save**. 5. Click **OCR Documents** on the OCR Set Console. 6. Click **Yes**. 7. Click **Refresh Page** on the OCR Set Console until the Status is Completed. 8. Click on the first document link in the Document (OCR Results) item list. 9. Select the **Smoke Layout**. 10. Click the **Edit** icon. 11. Add the **Smoke OCR Destination** field to the layout. 12. Click **Save and Close**. | The new **Smoke OCR Set** is created and then run successfully. The results can be seen while viewing a document with the Smoke Layout selected. |  |

# Case Dynamics

## Using Case Dynamics

|  |  |  |  |
| --- | --- | --- | --- |
| Procedure | Documentation | Expected result | Done |
| Import and install the application. | 1. In the Relativity Community, download the Case Dynamics application for your current version of Relativity. 2. In Relativity, navigate to the **Application Library** tab. 3. Click **Upload Application**. 4. Click **Select File** and choose the Case Dynamics file that you downloaded. 5. Click **Save**. 6. Click **Select** in the Workspaces Installed section. 7. Select the **Smoke Workspace**, click on the Move selected left to right icon, and click **Apply**. | The Case Dynamics application installed in the Smoke Workspace. |  |
| Create an outline. | 1. Navigate to the **Outlines** tab. 2. Click **New Outline**. 3. Enter the following field information:    * **Name**—Smoke Outline    * **Textbox**—Smoke Custodian One started working at Relativity. Smoke Custodian Two started working at Relativity. 4. Highlight and right-click on **Smoke Custodian One**. 5. Select **Key Person**. The Create New Entity modal displays. 6. Click **Create New Entity**. 7. Highlight and right-click on **Relativity**. 8. Select **Key Organization**. The Create New entity modal displays. 9. Click **Create New Entity**. 10. Highlight and right-click on **Smoke Custodian One works at Relativity**. 11. Select **Fact**. The Add Fact modal displays. 12. Enter the following field information:     * **Data Type**—On     * **Primary Fact Date**—June 1, 2015     * **End Date**—June 1, 2015 13. Click **Add Fact**. 14. Click **Save.** | A new outline displays in the list. |  |
| Create a fact from the Facts tab. | 1. Navigate to the **Facts** tab. 2. Click **New Fact**. 3. Enter the following field information:    * **Fact**—Smoke Custodian One moved.    * **Description**—Smoke Custodian One moved to Illinois to be closer to Relativity’s Chicago office.    * **Date Type**—On    * **Primary Fact Date**—May 25, 2015    * **End Date**—May 25, 2015    * **Key Entities**—Smoke Custodian One 4. Click **Save**. | A new fact displays in the list. |  |
| Create an interview question from the Interview Questions tab. | 1. Navigate to the **Interview Questions** tab. 2. Click **New Interview Question**. 3. Enter the following information:    * **Key Entities**—Smoke Custodian One    * **Interview Question**—Why did you move?    * **Interview Question Facts**—Smoke Custodian One moved. 4. Click **Save**. | A new interview question appears in the list. |  |
| Create an issue from the Issues tab. | 1. Navigate to the **Issues** tab. 2. Click **New Issue**. 3. Enter the following information: **Issue**—Income lost. 4. Click **Save**. | A new issue appears in the list. |  |
| Review a document. | 1. Navigate to the **Documents** tab. 2. Open **TRANS\_00001** in the Viewer. 3. Select the Case Dynamics card in the upper-right. 4. Click the **Key People (Entity)** tab. 5. Select **Smoke Custodian One** in the Case Dynamics card. 6. Highlight and right-click on **PETER FRANC** on the fourth line of the Viewer. 7. Hover your cursor over **Add Case Dynamics Item** and select **Add New Key Person (Entity)**. The Create New Entity modal displays. 8. Click **Create New Entity**. 9. On page 4, highlight lines 20-23 and right-click on them. 10. Hover your cursor over **Add Case Dynamics Item** and select **Add New Fact**. The Add fact modal displays. 11. Click **Add Fact**. | The document has been reviewed and the relevant entity and fact are tagged. |  |
| Create a timeline. | 1. Navigate to the **Timeline Builder** tab. 2. Enter **Smoke Timeline** in the Name field. 3. In the Conditions section, select **Fact** and **Is Set**. 4. Click **Save**. | A new timeline appears that displays the previously created facts. |  |
| Create an offline report. | 1. Navigate to the **Report Set** tab. 2. Click **Smoke Timeline**. 3. Click **Create Offline Report** in the upper-right. The Report Set Layout opens. 4. Click **Generate Report** in the Report Set Console. | An offline report is created. |  |

# Creating dynamic objects

## Using the Relativity Dynamic Objects

|  |  |  |  |
| --- | --- | --- | --- |
| Procedure | Documentation | Expected result | Done |
| Create a new object type. | 1. Navigate to the **Object Type** tab. 2. Click **New Object Type**. 3. Enter the following field information:    * **Name**—Smoke Object    * **Parent Object Type**—Workspace    * Leave all remaining fields as default. 4. Click **Save**. | The new object type is accessible in the object types list. |  |
| Create a new field. | 1. Navigate to the **Fields** tab. 2. Click **New Field**. 3. Enter the following field information:    * **Name**—Smoke Multiple Object    * **Object Type**—Document    * **Field Type**—Multiple Object    * **Associative Object Type**—Smoke object    * Leave all remaining fields as default. 4. Click **Save**. | The new field is accessible in the fields list. |  |
| Add a field to a category. | 1. Navigate to the **Layouts** tab. 2. Using the All Document Layouts view, click **Smoke Layout**. 3. Click **Build Layout** from the Build Layout Console. 4. Enter **Smoke Multiple Object** in the Fields search bar. 5. Drag and drop the Smoke Multiple Object field into the Default Category section. 6. Click **Save and Close**. | The new field appears in the default category. |  |
| Add an associative object to the Smoke layout. | 1. Navigate to the **Layouts** tab. 2. Click on **Smoke Layout**. 3. Click **Build Layout**. 4. Click the arrow on the right side of the **Add Category** button and select **Add Object List**. 5. Select the following information:    * **Object**—Smoke Object    * **View**—All Smoke Objects    * **Link View**—All Smoke Objects 6. Click **Save and** **Close**. 7. Navigate to the **Documents** tab. 8. Open any document. 9. Select the **Smoke Layout**. | The associative object list is present on the layout. |  |

# Widgets

|  |  |  |  |
| --- | --- | --- | --- |
| Procedure | Documentation | Expected result | Done |
| Adding a new pivot to your dashboard. | 1. Navigate to the **Folder Browser** on the **Documents** tab. 2. Select the folder **HernandezJuan.** 3. Click the **Add Widget** button on your dashboard, and then select **Pivot** from the drop-down. 4. Select the following pivot options:    * **Group By**—Smoke Designation    * **Pivot On**—<Grand Total>    * **Default Display Type**—Select the type of pivot you want to display. Bar chart. 5. Click **Add Pivot**. | The results display 1 Smoke Responsive document.  If a field does not show up in the drop-down menu, perform the following steps to enable them for use in Pivot:   1. Navigate to the **Fields** tab. 2. Find the desired field and click **Edit** next to its name. 3. Change the **Allow Group By** or **Allow Pivot** field settings accordingly. |  |
| Adding a cluster visualization widget to your dashboard. | 1. Click the **Add Widget** button on your dashboard, and then select **Cluster Visualization** from the drop-down.  The Cluster Visualization Settings modal displays. 2. Select **Smoke Cluster** and then click **Apply**. | The cluster visualization displays on your dashboard. |  |
| Saving your new Smoke dashboard. | 1. Click the **Dashboards** drop-down menu in the top right corner of the screen. 2. Click **Save As** to save your configuration as a new dashboard, and then enter a **Smoke Dashboard** as the Name and **10** as the Order number. 3. Click **Save**. | Your Smoke Dashboard is saved with the pivot chart and cluster visualization widget that you created. |  |

# Relativity Integration Points

|  |  |  |  |
| --- | --- | --- | --- |
| Procedure | Documentation | Expected result | Done |
| Import the application. | 1. Navigate to the **Relativity Applications** tab. 2. Click **New Relativity Application**. 3. Enter the following field information:    * **Application Type**—Select from the Application Library    * **Choose from Application Library**—Integration Points 4. Click **Import** after the page refreshes. | After the application imports, the Import Status displays. |  |
| Add an integration points agent. | 1. Navigate to the **Agents** tab. 2. Click **New Agent**. 3. Click **Select** in the **Agent Type** field. 4. Filter and then select the **Integration Points Agent** option. 5. Click **Set**. 6. Enter the following remaining field information:    * **Agent Server**—the name of your server, VM-INSTANCE-NAME    * **Run interval**—5    * **Logging level of event details**—Log all messages    * **Initial Status**—Enabled 7. Click **Save**. | The new agent appears in the agents list. |  |
| Create a integration points destination workspace. | 1. Navigate to the **Workspaces** tab. 2. Click **New Workspace**. 3. Enter the following field information in the Workspace Information section:    * **Name**—Smoke Destination Workspace    * **Matter**—Smoke Matter    * **Client**—Smoke Client    * **Template Workspace**—Relativity Starter Template 4. Enter the following field information in the Advanced Settings section: **Status**—Active 5. Enter the following field information in the Resource Information section:    * **Resource Pool**—Default    * **Database Location**—Default    * **Default File Repository**—Select the available repository.    * **Default Cache Location**—Select the available cache location.    * **Download Handler URL**—Default 6. Click **Save**. | The destination workspace is appears in the workspace list. |  |
| Create an integration point. | 1. Navigate to the **Workspaces** tab. 2. Click **Smoke Workspace**. 3. Navigate to the **Integration Points** tab. 4. Click **New Integration Point**. 5. In the General section, enter the following field information:    * **Name**—Smoke Integration Point    * **Type**—Export    * **Source**—Relativity    * **Destination**—Relativity. For the purposes of this document, select **Relativity** as the destination of your integration point.    * **Transferred Object**—Document    * **Profile**—None    * **Email Notification Recipients**—Leave blank    * **Log Errors**—Yes    * **Enable Scheduler**—No 6. Click **Next**. 7. In the Connect to Source section, enter the following field information:    * **Source**—Saved Search    * **Saved Search**—Smoke Search 1    * **Destination Workspace**—Smoke Destination Workspace    * **Location**—Select **Folder** and then select the desired location for the export.    * **Create Saved Search**—No 8. Click **Next**. 9. In the Field Mappings section, complete the following fields:    * **Field Mappings**—map the **Extracted Text** and **Control Number** fields.      + If the WebAPIPath instance setting in the kCura.IntegrationPoints section is not configured correctly after upgrade or installation, the Source field list is empty because it cannot return any attributes, and you are not able to map fields.    * **Copy Images**—No    * **Copy Native Files**—Physical files    * **Use Folder Path Information**—No 10. Click **Save**. 11. Click **Run** on the Transfer Options Console. | The new integration point is accessible on the integration points list. |  |

# Transcripts

## Using the Transcripts application

|  |  |  |  |
| --- | --- | --- | --- |
| Procedure | Documentation | Expected result | Done |
| Import and install the application. | 1. In the Relativity Community, download the Transcripts application for your current version of Relativity. 2. In Relativity, navigate to the **Application Library** tab. 3. Click **Upload Application**. 4. Click **Select File** and choose the file that you downloaded. 5. Click **Save**. 6. Click **Select** in the Workspaces Installed section. 7. Select the **Smoke Workspace**, click on the Move selected left to right icon, and click **Apply**. | The Transcripts application is installed. |  |
| Upload transcripts files. | 1. Navigate to the **Workspaces** tab and select **Smoke Workspace**. 2. Navigate to the **Documents** tab. 3. Click on the Simple File Upload drop-down menu in the upper-left and select **New Transcript**. The Upload New Transcript modal displays. 4. Click **Select File** in the Upload field and in the Post-Installation Verification Test Data folder, navigate to **Post-installation verification test data\VOL00001\Transcripts\MaxineWolf.lef.** 5. Select MaxineWolf.lef and click **Open**. 6. Click **Upload** in the bottom-right. 7. Click on the Simple File Upload drop-down menu in the upper-left and select **New Transcript**. The Upload New Transcript modal displays. 8. Click **Select File** in the Upload field and in the Post-Installation Verification Test Data folder, navigate to **Post-installation verification test data\Transcripts\Lawrence Patterson Vol 1 page 1.xmef.** 9. Select Lawrence Patterson Vol 1 page 1.xmef and click **Open**. 10. Click **Upload** in the bottom-right. | The transcripts files are uploaded to Relativity. |  |
| Access the linked video. | 1. From the Documents tab, click **Lawrence Patterson Vol 1 page 1.xmef**. The transcript opens in the Viewer. 2. Click on the transcript to open the document in the Transcript Viewer. 3. Click  in the bottom-left corner of the Viewer. The video player opens. 4. In the Transcript Viewer, right-click on the line number **1:20**. 5. Select **Go to video from this line**. The video starts playing from line 1:20. | The linked video plays from the selected place in the transcript |  |
| Annotate transcript. | <https://help.relativity.com/Server2024/Content/Relativity/Transcripts_application/Annotating_transcripts.htm#Adding_designations_inline> | Annotations are added to transcript. |  |
| Use the word index to find and locate a search term in the document. | <https://help.relativity.com/Server2024/Content/Relativity/Transcripts_application/Word_Index.htm> | The word index finds your search term in the Viewer. |  |
| Create and edit a video clip. | 1. With Lawrence Patterson Vol 1 page 1.xmef still open in the Viewer, right-click on the designation bar for lines 1:6 through 1:9. 2. Select Create Video Clip. The Video Clips card opens on the right. 3. In the Video Clips card, change the To field from 1:9 to 1:11. 4. Click **Save Video Clip**. 5. Select the video clip you just created. 6. Click on the Merge and Export drop-down menu and select **Export Video Clips**. The Export Video Clips modal displays. 7. Click **Export Video Clips**. | The video clip is edited and exported successfully. |  |
| Create an Annotations Digest report. | 1. Navigate to the **Documents** tab. 2. Click the **Transcripts** folder. 3. Select both **MaxineWolf.lef** and **Lawrence Patterson Vol 1 page 1.xmef**. 4. Select **Transcript Reports** from the mass operations drop-down menu. The Export Transcripts pop-up displays. 5. Select **Annotations Digest** in the Report type field. 6. Select **Exhibits**, **Designations**, and **Notes** for the Include Annotations field. 7. Click **Export**. | An annotations digest report is downloaded to your workstation. |  |

# Delete Smoke workspace components

|  |  |  |  |
| --- | --- | --- | --- |
| Procedure | Documentation | Expected result | Done |
| Create and delete the Branding Manager agent. | 1. Navigate to the **Agents** tab. 2. Click **New Agent**. 3. Enter the following field information:    * **Agent Type**—Branding Manager    * **Agent Server**—the name of your server, VM-INSTANCE-NAME 4. Click **Save**. 5. Verify that the new Branding Manager agent is in the agents list. 6. Click on the Branding Manager agent. 7. Click **Disable Agent** in the Agent Actions console. 8. Click **Delete** and then **Delete** again. | The Branding Manager agent is removed and no longer visible in the agents list. |  |
| Verify the Smoke user. | 1. Open the Smoke Workspace from the **Workspaces** tab. 2. Navigate to the **User Status** tab. | User, Smoke is visible in the item list. |  |
| Delete the Smoke indexes. | 1. Navigate to the **Search Indexes** tab. 2. Click on the **Smoke Analytics** index and delete the index. Click Dependencies when deleting indexes to ensure you remove all dependencies first. | The Smoke Analytics indexes are no longer visible in the indexes list. |  |
| Delete the Smoke group. | 1. Navigate to the **Groups** tab. 2. Click on **Smoke Group**. 3. Click **Delete** and then **Delete** again. | The Smoke Group is no longer visible in the groups list. |  |
| Delete the Smoke user. | 1. Ensure you are logged in as an administrative account user. 2. Navigate to the **Users** tab. 3. Click on **User, Smoke**. 4. Click **Delete** and then **Delete** again. | User, Smoke is no longer visible in the users list. |  |
| Delete the Smoke workspace. | 1. Open the Smoke Workspace from the **Workspaces** tab. 2. Navigate to the **Workspace Details** tab. 3. Click **Delete** and then **Delete** again. | The Smoke workspace is no longer visible in the workspaces list. |  |

**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.

**©2021. Relativity ODA LLC. All rights reserved. Relativity® is a registered trademark of Relativity ODA LLC.**