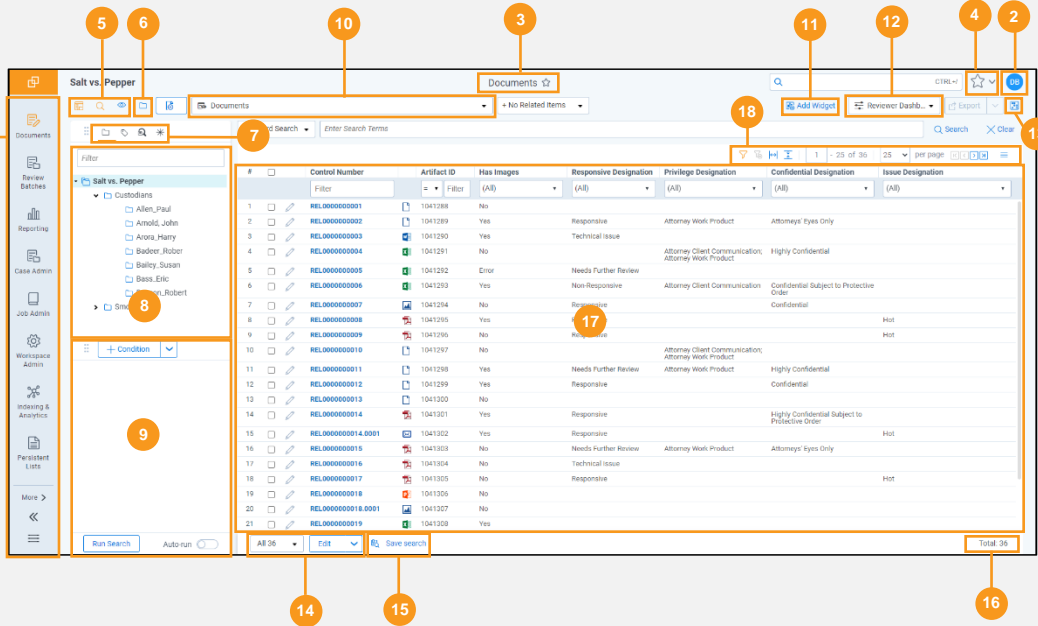




Case Workspace Quick Reference Guide



Case Workspace Areas

1	Sidebar	A vertical navigation pane containing parent tabs, object tabs, and/or external link tabs. The tabs shown here are determined by the workspace admin and are meant to contain the most frequently used tabs.
2	Avatar	An image containing the user's initials which you can click to access the user menu.
3	Breadcrumbs	Displays the current page you are on and the tab path used to navigate there.
4	Favorites menu	Click to view pages that you have saved as favorites as well as a list of recently visited pages. Click on any page in the menu to navigate there.
5	Panel toggle icons	Determines whether the browser, search panel, and/or document preview panel display.
6	Current browser location	Click to display where the user has selected a folder or saved search in the browser panel.
7	Document browser menu	Determines whether the browser displays folders, tags, saved searches or clusters.
8	Browser	Browse through documents using folders, saved searches, or the field tree.
9	Search panel	Create and set search and filter conditions for your documents.
10	View bar	Determines which documents and fields are displayed in the document list.
11	Add Widget button	Add a new Pivot or Cluster widget to the dashboard.
12	Dashboard functions	Where you can save your current dashboard.
13	Sampling button	Use sampling to create a randomized sample of the documents.
14	Mass operations bar	Options to take mass action on some or all documents in the document list.
15	Save search button	Click to save the current search conditions on your list as a new saved search.
16	Total items	Displays the total number of documents in the set.
17	Document List	The central location for viewing and acting on your documents.
18	Document list controls	Determines how your documents are displayed and allows you to navigate through them.

View Bar

View menu	Select a view or click the icons to edit or delete a document view.
Related items menu	Select whether to display related items to the documents displayed (e.g., Family, Duplicates).

Document Browser Menu

	Folders	Navigate the folder hierarchy for your workspace.
	Field Tree	Displays a tree of field selections.
	Saved Searches	Create a new saved search or access previously saved searches.
	Clusters	Shows the Relativity Analytics cluster hierarchy.
	Show / Hide Filters	Click the orange icon to show filters for columns in the item list. Click the blue icon to hide them.
	Clear Filters	Click this icon to clear any filters that have been applied to the item list.
	Reset column sizes	To return to the original settings for the columns, click the Reset Column Sizes icon.
	Turn Grid Style On / Off	This shrinks the row padding and alternates row shading to make your data more compact and easier to read.
		Use these navigational controls to navigate the pages in the document list.