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1 User guide overview

When working with Relativity as a reviewer, it’s important to familiarize yourself with the tool’s many implementations.

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

1.1 Navigation

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

1.1.1 Logging in

To log in to Relativity, browse to your Relativity website. If you don't know the correct address, contact your Relativity admin. After you enter the address, the login screen appears.

![Relativity 9 Login Screen](image.png)

Enter your email address and password. If you don't know your login information, contact your Relativity admin.

**Note:** The *Forgot your password?* link only displays if an admin enables the ShowForgotPasswordLink configuration table value. See the Configuration table guide.
1.1.2 User options

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

You can click your name in the upper-right corner to see the user drop-down menu.

![User drop-down menu]

Depending on your permissions, you may have the option to edit your settings or reset your password. If you don't see admin tabs, your Relativity admin can change your permission settings.

1.1.2.1 Changing the default Home tab

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

Perform the following steps to change the default Home tab:

1. From Home, click the Administration tab.
2. Click the Tabs tab.
3. Click the tab you want to set as the default Home tab.
4. Click Edit.
5. Select Yes in the Is Default drop-down menu.
6. Click Save.

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

1.1.2.2 My settings

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

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

- **Email address** - your email address and login.
- **Skip Default Preference** - When reviewing documents, skip prevents a reviewer seeing documents that are already coded (depending on the selected view). See Document skip in the Admin guide. Choose one of the following options:
  - **Normal** - this setting disables the skip feature.
  - **Skip** - this setting turns on the skip feature.
- **Default Filter Visibility** - determines whether or not the filters for columns in views display by default.
  - **Hidden** - hides filters by default.
  - **Visible** - displays filters by default.
- **Item list page length** - a numeric field indicating the default list length for all lists in Relativity. It can be set from 1 to 200.
- **Default Selected File Type** - the default viewer mode (Viewer, Native, Image, Long Text, or Production). See Viewer on page 70 for details.
- **Advanced Search Public by Default** - determines whether saved searches are public or private by default. If set to Yes, the search is public and all users with rights to it can see it. If setting is No, the search is private and only you are able to see it.

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

- **Native Viewer Cache Ahead** - if checked, this field pre-loads the next native document in your review queue when the active document is loaded.
- **Data Focus** - determines whether your default setting is to show or hide the workspace name in the interface. Data Focus On hides the workspace name at the top left and allows more space in the window for data information. Data Focus Off shows the workspace name. You can also toggle the Data Focus setting directly from the Home menu.

After changing your settings as needed, click **Save**.
1.1.3 Core reviewer interface

To open a document in the core reviewer interface, click on a document name or identifier on the Documents tab.

The core reviewer interface screen consists of the following areas:

1. Document view selector
2. Viewer
3. Navigation bar
4. Layouts
5. Related Items pane
6. Persistent Highlight Sets

You can toggle between several viewing options by using the icons in the upper-right corner of the window.
- **Keyboard shortcuts legend** - displays the keyboard shortcuts legend for the workspace.
- **Enable/disable keyboard shortcuts** - enables and disables keyboard shortcuts for the workspace.
- **Show/hide document list** - show or hide the document list from the Core Reviewer Interface.
- **Dock/undock document viewer** - docks or undocks the viewer from the Core Reviewer Interface.
- **Swap panes** - flips the Viewer from the left side of the window to the right or vice-versa.
- **Launch stand-alone document viewer** - pops out a static standalone version of the Viewer.
- **Show/hide tab strip** - shows or hides the tab strip.

You can move through a set of documents by using the navigation menu located in the upper-right corner of the core reviewer interface.

<table>
<thead>
<tr>
<th>Document 1 of 1000</th>
<th>❯</th>
<th>❯</th>
<th>❯</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top of first page</td>
<td>Previous page</td>
<td>Next page</td>
<td>Last page</td>
</tr>
</tbody>
</table>

You can't browse past the last document in your returned set. For example, in the above screenshot, you can't use the navigation arrows to get to document 1,001.

### 1.1.4 Resetting your password

There are two ways you can reset your password if your admin has given you the appropriate permissions. You can use the **Reset Password** option inside Relativity or the **Forgot your password?** link on the Relativity login screen.

**Note:** If your password has expired, the Reset Password dialog appears automatically when you log in to Relativity. Your admin determines when your password expires and the number of previous passwords that you can't reuse.

#### 1.1.4.1 Resetting your password inside Relativity

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

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

### 1.1.4.2 Resetting your password outside Relativity

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

1. Click **Forgot your password?** on the login screen.
2. Enter your email address in the popup.

   ![Email Address](image)

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

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

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

### 1.1.5 Favorites

The Favorites menu contains all your bookmarks (Favorites) and the last 10 pages in your browsing history (Recents). The Favorites menu appears at the top of the application window next to your username.
Use Favorites to quickly navigate the Relativity application. If you visit a particular page on a regular basis, minimize the number of clicks it takes to get there by adding the page as a favorite.

To mark a page a favorite, click the gray star next to Favorites, or click the gray star next to a page name in the Recents section. The star turns yellow and Relativity adds the page to the Favorites section. Relativity doesn't limit the number of pages you can mark as a favorite.

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

### 1.1.6 Using Favorites

Imagine you're a system admin whose duties include resetting passwords for an average of 20 to 30 users per day. You could navigate to the Administration tab, then click the Users tab each time a password reset request comes through the queue, but instead you create a favorites bookmark to easily jump you the Users tab from any tab in Relativity you might be working on.

You create favorites bookmarks for all of the tabs that you most frequently visit optimizing your productivity.

**Note:** If you're an administrator, you can turn off this feature by editing the RecentHistoryEnabled and FavoritesEnabled configuration values. You can also change the number of Recents the Favorites menu displays by editing the RecentHistoryNumberOfItemsDisplays configuration value.

### 1.1.7 Quick nav

Quick nav allows you to quickly search for and navigate to any workspace or tab in Relativity. To access quick nav, click \[ \] in the upper right corner of Relativity, or use the keyboard shortcut Ctrl+/.
Note: Verify that the quick nav Ctrl+/ keyboard shortcut works on custom pages. Contact Client Services with any problems.

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

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

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

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

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

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

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

  Note: This item only appears when you are in a workspace.
- **Admin Tabs** - lists all admin tabs that fit the search criteria and are available with your permission settings.
- **Workspaces** - lists all workspaces that fit the search criteria and are available with your permission settings. Click the workspace to go to the default tab for that workspace.

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

### 1.1.8 Using quick nav

Imagine you're a system admin in a workspace within Relativity, and a user emails you with a password reset request. You press Ctrl+/ and type the letters “use”. The results filter to only contain Admin and Workspace tab names with the letters u-s-e.

The results display a Users tab in the Admin Tabs section. You click the Users tab and find the user who needs a password reset in the list. Once their password is reset, you use quick nav to get back to the workspace you were previously working in.

### 1.1.9 Quick nav functionality

The following list highlights more features of quick nav functionality.

- Type the word "home" in quick nav to navigate to your default Home tab.
- Quick nav is enabled or disabled with the QuickNavEnabled configuration table setting.
- Quick nav is available to look up workspaces and admin tabs from Home for groups assigned the **Use Quick Nav** admin permission, and it is available to look up tabs in a workspace for groups assigned the **Use Quick Nav** workspace permission.
- The maximum number of returned quick nav search results is limited to any number between 2 and 50, but the default is 20. Use the QuickNavMaxResults configuration table setting to adjust the maximum number of results.
- The maximum number of searchable characters is 50.

### 2 History

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

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

**Using history**

You’re a Relativity administrator and you recently had to let one of your reviewers go after it was discovered that he’d insufficiently redacted sensitive information contained in a large group of
documents right before you were planning to produce those documents and send them to the presiding judge. In addition to going back and correctly applying that reviewer’s redactions, you need to look up all the other places in the workspace in which he might have incorrectly coded documents or, in general, entered inaccurate information.

To find all areas in the workspace that this reviewer touched, you navigate to the Administration tab, then to the History tab. Since he’d been working on this project for at least a month, you change the view from its default of Document Updates - Last 7 Days to All History. Then you simply filter the User Name field and select the name of the reviewer.

When the results come back, you notice that this reviewer was particularly active and that there are over 1,000 user actions attached to his name. To ensure that none of these actions compromised any other segment of the review project or skewed information intended to be used as evidence, you need to review each one. To help in this effort, you enlist two of your more reliable reviewers to go through this list of History items and check the departed reviewer’s clicks.

2.1 History view fields

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

The following fields are available in views on this tab:

- **Action** - the user activity captured in the audit record.
- **Artifact ID** - the artifact ID of the audit action.
- **Details** - the detailed description of the audit action.
- **Execution time** - the length of time in milliseconds for a document query to run.
- **ID** - the identifier for the audited item; each tracked action has its own unique identifier.
- **Name** - the name of the object.
- **Object type** - the type of object.
- **Request origination** - the connection details for the user that sent the change request.
- **Timestamp** - the date and time when the audit action occurred.
- **User name** - the user who initiated the action.
You can export the contents of a view to Excel using at the top of the screen. Only the currently-loaded records are included in the Excel file. For example, in the following workspace, only 1,000 records would be included instead of the full 2,501 records.

Some features' history views are more detailed.

- For more information, see Saved search history in the Searching Guide.
- For more information on imaging history, see Imaging history in the Admin guide.

### 2.2 Filters on the History tab

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

You can also search for choice values using the Details Filter. Actions related to field choices are recorded using Artifact ID. To display the Artifact ID for choice values, click the Choice Legend icon in the view bar.
On the Choice Legend popup, you can search for choices in the workspace, their artifact IDs, and their associated fields. You can then enter Artifact ID listed for a choice value in the Details Filter and filter the audit records. For example, you would use the Artifact ID 2881180 to filter on the Issue choice "Responsive."
Note: You can also use views to filter audit records. See History view fields on page 16.

### 2.3 Audited actions

The following table lists audited actions in Relativity:

<table>
<thead>
<tr>
<th>Action name</th>
<th>Description of activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>CaseMap - Add Document</td>
<td>A document was sent to CaseMap.</td>
</tr>
<tr>
<td>CaseMap - Add Fact</td>
<td>A selection of text from the viewer was sent to CaseMap as a fact.</td>
</tr>
<tr>
<td>Conversion Complete</td>
<td>A file was converted by way of a user clicking on a file link in the document list, running an imaging set, imaging on the fly, running a mass image operation, or switching to text or production mode in the viewer.</td>
</tr>
<tr>
<td>Create</td>
<td>An item was created.</td>
</tr>
<tr>
<td>Delete</td>
<td>An item was deleted.</td>
</tr>
<tr>
<td>Document Query</td>
<td>A query was run on a list of documents, or a document query was canceled. (A message indicating that a query was canceled is displayed in the details and on the Query Text pop-up.)</td>
</tr>
<tr>
<td>Export</td>
<td>The contents of a production set, saved search, folder, or subfolder were exported.</td>
</tr>
<tr>
<td>Images - Created</td>
<td>Images were created.</td>
</tr>
<tr>
<td>Images - Created for Production</td>
<td>Images corresponding to a production outside of Relativity were imported into the system.</td>
</tr>
<tr>
<td>Images - Deleted</td>
<td>Images were deleted.</td>
</tr>
<tr>
<td>Import</td>
<td>Content associated with a load, production, or image file was imported.</td>
</tr>
<tr>
<td>Markup - Image - Created</td>
<td>Redactions or highlights were added to an image.</td>
</tr>
<tr>
<td>Markup - Image - Deleted</td>
<td>Redactions or highlights were removed from an image.</td>
</tr>
<tr>
<td>Markup - Image - Modified</td>
<td>Redactions or highlights were moved, resized or edited on an image.</td>
</tr>
<tr>
<td>Markup - Native - Created</td>
<td>Redactions or highlights were added. This audit entry applies to transcripts only.</td>
</tr>
<tr>
<td>Markup - Native - Deleted</td>
<td>Redactions or highlights were removed. This audit entry applies to transcripts only.</td>
</tr>
<tr>
<td>Markup - Native - Updated</td>
<td>Redactions or highlights were moved, resized or edited. This audit entry applies to transcripts only.</td>
</tr>
<tr>
<td>Move</td>
<td>A document was moved from one folder to another.</td>
</tr>
<tr>
<td>Native - Created</td>
<td>A native file was loaded into Relativity.</td>
</tr>
<tr>
<td>Native - Deleted</td>
<td>A native file was removed from Relativity.</td>
</tr>
<tr>
<td>Pivot Query</td>
<td>A Pivot report was run, or a Pivot report was canceled. (A message indicating that a query was canceled is displayed in the details and on the Query Text pop-up.)</td>
</tr>
<tr>
<td>Print</td>
<td>A document was printed.</td>
</tr>
<tr>
<td>Production - Add Document</td>
<td>A document was added to a production.</td>
</tr>
<tr>
<td>Production - Remove</td>
<td>A document was removed from a production.</td>
</tr>
<tr>
<td>Action name</td>
<td>Description of activity</td>
</tr>
<tr>
<td>--------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Document</td>
<td></td>
</tr>
<tr>
<td>Query</td>
<td>A process ran a query (such as categorization), or a query was canceled. (A message indicating that a query was canceled is displayed in the details and on the Query Text pop-up.)</td>
</tr>
<tr>
<td>RelativityScriptExecution</td>
<td>A Relativity script was run.</td>
</tr>
<tr>
<td>ReportQuery</td>
<td>A summary report was run.</td>
</tr>
<tr>
<td>Run</td>
<td>An Imaging Set, Image-on-the-Fly, or Mass Image job was performed</td>
</tr>
<tr>
<td>Search Cache Table</td>
<td>A search cache table was created. (Search cache tables are created the first time you search for a term or phrase using dtSearch or Relativity Analytics.)</td>
</tr>
<tr>
<td>Creation</td>
<td></td>
</tr>
<tr>
<td>Security</td>
<td>Security rights were assigned or changed</td>
</tr>
<tr>
<td>Tally/Sum/Average</td>
<td>The mass operation Tally/Sum/Average was run in the workspace.</td>
</tr>
<tr>
<td>Update</td>
<td>Document metadata was updated on a single-document basis. In addition, filters on information related to applications installed through the workspace or by an agent.</td>
</tr>
<tr>
<td>Update - Mass Edit</td>
<td>Document metadata was updated on a mass basis.</td>
</tr>
<tr>
<td>Update - Mass Replace</td>
<td>Document metadata was edited using a text mass replacement.</td>
</tr>
<tr>
<td>Update - Propagation</td>
<td>Document metadata was edited according to a propagation rule.</td>
</tr>
<tr>
<td>View</td>
<td>A document was viewed.</td>
</tr>
<tr>
<td>Workspace Upgrade</td>
<td>Details about scripts run on a workspace during an upgrade.</td>
</tr>
</tbody>
</table>

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

### 3 Indented lists

Indented lists provide additional information to users by displaying levels within a relationship, such as an email conversation thread. Viewing a list in the indented hierarchy allows for easier understanding of the email order in the family.

Indented items are aligned with dots indicating levels between the initial record and subsequent records, as in the following example of emails and their replies or forwards. While you can define indented lists based on any related items field, this example shows an indented list in the context of setting up an email thread view that shows Reply and Forward emails nested under the parent.

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>12</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Here are some examples of indented lists in the context of setting up an email thread view that shows Reply and Forward emails nested under the parent.
Indented lists are available in the document item list as shown in the example above and in the related items pane in the Viewer. See Indented lists on the previous page for a related items pane example.

http://help.kcura.com/9.0/#../Subsystems/Default/Content/Recipes/Data Visualization and Analysis/Displaying family groups by building an indented view.htm

4 Inline tagging

Inline tagging is a feature that allows you to tag sections of text within a transcript that you can then reference through hyperlinks. If a record is large and covers many topics, it may be difficult to identify which part of the record relates to which issue. For example, issue coding is a common task. With inline tagging, you can create tags named after the issues in your case, and tag specific sections of documents as relating to those issues.

Inline tagging is only available for transcripts. See Transcripts on page 69. For information on using layouts to code non-transcript documents, see Layouts in the Admin guide.

*Note:* If you want to add inline tagging to a transcript, you must first process the transcripts using the Process Transcripts mass action.

**Using inline tagging**

Imagine you're analyzing documents, looking for content related to the issues of "contracts" and "buildings". You encounter a document that you want to apply both issues to, but you want to call out the specific areas in the document.

Because tags allow you to label individual pieces of text as related to different issues, you decide to use inline tagging. You highlight "signed this contract", right-click, select **Tag**, and choose the "contracts" tag.
You want to tag the mention of construction as "buildings", so you repeat the same process.

You’ve now applied two tags to the same document. To view the tags you applied, you click the tag list icon to bring up the tag list pane, which shows all the tags in the document.
When you click the hyperlinked entries in the pane, the active tag appears in blue in the viewer.
4.1 Adding a tag to a transcript

To add a tag to a processed transcript:

1. Open a transcript from the Documents tab.
2. Highlight the text you want to tag.
3. Right-click on the selected text, and click Tag.
4. Select the checkbox next to the tag(s) you want to apply.
5. Click Save.

4.2 Viewing tags in a transcript

To view all the tags in a transcript:

1. Open a transcript from the Documents tab.
2. Click the tag icon in the lower right corner.
4.3 Removing a tag from a transcript

To remove a tag from a transcript:

1. Open a transcript from the Documents tab.
2. Right-click on the tag in the document.
3. Click Remove.

5 Markups

Markups in Relativity refer to highlights and redactions. You can add markups to documents using the Relativity image viewer. When you open a document in the core reviewer interface, select Image to image the document if necessary and open the document as an image.

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

Using markups

You’re a reviewer at a law firm, and one of your firm’s clients, a construction company, is involved in litigation regarding the use of materials that they weren’t informed were potentially environmentally damaging when they purchased them from a major supplier.

Included in the data set are many invoices from the past year that contain the various department and personal credit cards numbers used to purchased said materials, as well as a few instances of social security numbers used in conjunction with those cards.

These invoices are crucial pieces of evidence that your firm plans on producing and handing over to the judge. Before those documents can be produced, however, you need to go through them and find all instances of credit card and social security numbers and apply redactions to those instances, as this is sensitive information.

Your admin has already set up a view specifically for invoices, bank statements, and other files related to purchases and accounts. To redact any sensitive information contained in these documents, you open them in the Viewer and scan the imaged document for instances of said numbers. When you come across them, you select the black redaction and draw it over the number or list of numbers you need to obscure.
Now there’s no danger of your production being tainted by inadvertently revealing this sensitive information, which in some cases could render the produced documents inadmissible.

5.1 Highlights

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

5.1.1 Creating highlights

To create a highlight, perform the following steps:

1. Click . Yellow is the default color. Click the drop-down menu to select a different color.
2. Draw the highlight across the section(s) of text you want to highlight.

When you create a highlight, it appears in the Markup Navigation Pane. See Using the Markup Navigation pane on page 32.

5.2 Redactions

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

- Creating basic redactions on the next page
- Creating inverse redactions on the next page
Creating full-page redactions on the next page
Creating mass redactions on the next page

When you create a redaction, it appears in the Markup Navigation Pane. See Using the Markup Navigation pane on page 32.

5.2.1 Creating basic redactions

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

1. Click \( \text{ό} \). The black redaction tool is the default. Click the drop-down menu to select a different tool. You can select from the following:
   - **Black** - creates a solid black box, like using a black marker. While you draw the box, a gray translucent fill appears.
   - **Cross** - creates a white redaction box black border and a black X from corner to corner.
   - **Text** - creates a white redaction box with black text. The text will fill the box by default. To change the font size, keep the redaction box selected and click \( \text{ό} \), then select a new font size from the drop-down menu. You can right-click a text box redaction to apply different text. See Editing redaction text on page 30. The Administrator determines which text options are available.
   - **White** - creates a solid white box with a gray border. The gray border won’t be printed or produced.

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

5.2.2 Creating inverse redactions

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

1. Click \( \text{ό} \).

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

A full-page redaction creates a redaction across the entire page. To apply a full-page redaction, click □. The black full page redaction tool is the default. Click the drop-down menu to select a different tool. You can select from the following:

- **Black** - creates a solid black box, like using a black marker.
- **Cross** - creates a white redaction box with a black border and a black X from corner to corner.
- **Text** - creates a white redaction box with black text. You can right-click a text box redaction to apply different text. See Editing redaction text on page 30. The Administrator determines which text options are available.
- **White** - creates a solid white box with a gray border. The gray border won’t be printed or produced.

You can also create a keyboard shortcut to apply a full-page redaction. See Creating keyboard shortcuts in the Admin guide.

After you apply a full-page redaction, you can resize it to make it smaller than the full page and then work with it like a normal redaction.

5.2.4 Creating mass redactions

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

1. Click □ The Mass Redact Options popup appears.
2. Select the type of redaction to apply. You can select from the following:

- **Black** - creates a solid black box, like using a black marker.
- **Cross** - creates a white redaction box with a black border and a black X from corner to corner.
- **Text** - creates a white redaction box with black text. In the Text Options section, you can select the font size and text to apply to the redactions. To apply custom text, select `<Enter Custom Text>` from the Text drop-down menu, then enter the text in the Text field.
- **White** - creates a solid white box with a gray border. The gray border won't be printed or produced.

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

4. Click **OK**. The redactions are applied to the set of pages you specified.

### 5.3 Editing markups

To resize a single markup, click inside the markup shape. White dot controls will appear on the corners and edges of the markup. Select any control and drag to resize the markup.

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

To move, click and drag the selected markups to a new location. You can also move selected markups using the arrow keys. Each time you hit an arrow key, the markups move 10 pixels in that direction. For finer control, hold Shift while pressing an arrow key, and the markups move only 1 pixel in that direction.

To delete, right-click a selected markup and click Delete, or press the Delete key and click Yes on the Confirm Delete popup. All selected markups are deleted. For Mac users, press Fn + Delete.

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

### 5.3.1 Working with overlapping markups

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

![Diagram of overlapping markups]

### 5.3.2 Editing redaction text

To edit the text in a text box redaction, perform the following steps:
1. Right-click the redaction and select **Edit**. The Enter Redaction Text popup opens.

![Edit Redaction Text](image)

2. Enter the new redaction text in the field and click **OK**. The new text appears in the redaction.

### 5.3.3 Editing font size in text box redactions

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

1. Select the text box redaction(s). You can press **Ctrl** or **Shift** and click to select multiple text box redactions.

2. Click the Font Size tool ![Font Size Tool](image) and select a font size. The font size is applied to the text in all selected text box redactions.

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

### 5.4 Mass deleting markups

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

1. Click ![Delete Markups Button](image). The Mass Delete Markup Options popup appears.
2. Select the markup types you want to delete. You can select Non full-page redactions, Full-page redactions, Highlights, or any combination of these.
3. Select the range of pages from which to delete the selected markups. You can select This page, Pages (enter a set of pages), or All pages in document.
4. Click OK. The selected markup types are deleted from the range of pages you selected.

5.5 Controlling markup visibility

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

- Click once to set the markups to transparent.
- Click a second time to set the markups to invisible. The redactions are not deleted, just temporarily hidden.
- Click a third time to return the markups to full visibility.

5.6 Viewing markup history

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

5.7 Using the Markup Navigation pane

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

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

6 Persistent highlight sets

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

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

Persistent highlight sets are reusable, transferable, and independent of markup sets. See *Markup sets* in the Admin guide.

---

**Using persistent highlight sets**

You’re a Relativity administrator and one of your clients, a medical patient advocate group, is suing a hospital system because their IT department accidentally allowed a security breach that resulted in the theft of thousands of patients’ social security numbers and pieces of personal health information.

The data set you need to review for this case includes thousands of emails, invoices, and other notifications containing references to the pieces of information that were compromised in the breach. You need to equip a small group of reviewers with everything they need to find relevant documents as quickly as possible. You want your reviewers to find and code all files related to the following:

- Social security number
- Biometrics
- Medicare
- Insurance
- Diagnosis
- Treatment
- Beneficiaries

You created coding layouts, views, and search indexes, and now you want to enable your reviewers to quickly and easily locate instances of these terms in the documents they’re reviewing. For that, you use persistent highlight sets.

You create a new persistent highlight set with a name of “Patient Privacy,” which is congruent with the other objects you’ve already set up for this case. You give this set an order of 10 and you select Terms for the Source field choice. Then, in the Terms field, you enter the terms most prevalent to the data set and the specific highlight colors in which you want those terms to appear.
When you save this new persistent highlight set, reviewers can select it from a menu for every document they load in the Viewer. When they apply highlights, the document instantly points them to the locations of each term that appears. From there, they can easily tell if the document is responsive and if it’s worthy of being coded for some of the issues you’ve defined in this case. With this new persistent highlight set, you’ve expedited and ensured a thorough document review project.

6.1 Getting started with persistent highlight sets

Persistent highlight sets are created on the Persistent Highlight Sets tab of a workspace. Each set includes a list of terms populated manually or from a source field in the set configuration. After you create a persistent highlight set, the set and its terms are available in the Persistent Highlight Pane of the viewer.

The following persistent highlight set includes several terms with highlight color-coding. See Color-coding persistent highlights on page 40 for more information.

This set is available when a user opens the viewer and any edits made to this set are reflected immediately.
6.1.1 Showing and hiding persistent highlight sets in the viewer

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

Click the + sign next to a persistent highlight set to expand it and show the list of terms from that set found in the document. By default, all persistent highlight sets are enabled in the viewer, and terms found in a document are selected in the Persistent Highlight Pane and highlighted in the document. Click a persistent highlight set's name or the icon to hide all term highlights from the set in the document.
viewer. When a persistent highlight set's icon is 👀 and the terms appear partially transparent in the Persistent Highlight Pane, the term highlights for the set are hidden in the viewer.

**Note:** In Extracted text mode, the Persistent Highlight pane shows the term count per page of an open document. Navigate between pages using the viewer paging control in order to view the persistent highlight term count for other pages of a document. See [Extracted text mode](#) and [Viewer paging](#).

Clear a term's check box to hide its highlights in the viewer. Select its check box to apply highlighting for the term in the viewer again.

If any of the set's terms aren't present in the current document open in the viewer, they don't display in the Persistent Highlight Pane. For example, if you created a set named Investments that contains five highlight terms, and only three of the terms show in the pane for a particular document, the other two terms aren't present in the document.

When you select a persistent highlight term in the Persistent Highlight Pane, in addition to highlighting all instances of that term in the body of an email, the viewer also highlights instances of the term in the email header.
If a document doesn't contain any terms found in a set, you won't have the + expand option for the set in the pane. It is possible to have many highlight sets enabled but no highlights appear in a document.

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

- Showing or hiding the Persistent Highlight Pane.
- Enabling or disabling a persistent highlight set.
- Expanding or collapsing the term list for a persistent highlight set.
- Checking or clearing terms check boxes in a persistent highlight set.

### 6.1.2 Navigating highlighted terms in the viewer

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

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

When navigating through a document's highlighted terms, the following notification informs you when you reach the beginning or end of the document and there are no more highlights.

![Highlight Navigation]

**You have reached the end of the document.**

### 6.1.3 Persistent highlight set behavior across viewer modes

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

- Any changes made to a persistent highlight set tree in the panel when the viewer is undocked, such as terms selected or unselected, will display when the viewer is docked again.
- A synced stand-alone viewer won't display changes made to a persistent highlight set, such as terms selected or unselected, in the pane of the main viewer. However, Persistent Highlight Pane settings remain the same in the stand-alone viewer as the reviewer goes from doc to doc within the stand-alone viewer.
- The Persistent Highlight Pane maintains its current state when you swap viewer panes.
- The Persistent Highlight Pane in Extracted Text mode and Viewer mode are independent of each other. A change made to the pane in Extracted Text mode is not automatically reflected when the reviewer switches to Viewer mode and vice versa.
6.2 Creating persistent highlight sets

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

1. In a workspace, select the Persistent Highlight Sets tab.
2. Click the New Persistent Highlight Set button to display the default Persistent Highlight Set layout.
3. Complete all required fields in the persistent highlight set information section. See Fields below for details.
4. Click Save to create a new set

Note: Verify that reviewers are not actively reviewing documents when creating Persistent Highlight Sets. Creating Persistent Highlight Sets while reviewers are actively reviewing documents can cause errors.

6.2.1 Fields

Persistent highlight sets include the following fields.

- **Name** is the descriptive name under which you want this set to appear in the Viewer and item list.
- **Order** is the order in which you want this set to appear.
- **Source** determines the area that will be drawn from when designating characters to be highlighted and displayed in the Viewer. There are two options:
- **Highlight Fields** designates fields as the source of highlighting. Selecting this radio button means you must select a Highlight Field in order to save this set.
- **Terms** designates terms as the source of highlighting. Selecting this radio button means you must enter terms into the Terms field below to save this set.

- **Highlight Fields** allows you to choose the field referencing the list of terms to be highlighted. Click to bring up the system view called Field Picker on Persistent Highlight Sets, which displays the Name and Object Type for applicable multiple object fields, including those created by Search Terms Reports. To select the desired Highlight Field, check the field’s box, click Add, and click Set. The field is displayed on the layout. See Using the highlight fields source on page 42.
- **Terms** allows you to enter terms to be highlighted and the color code with which to distinguish them in the Viewer. See Entering highlight terms below.

**Note:** Persistent highlighting created by using search terms reports or other multiple object fields requires version 6.9 or higher of the Relativity web interface and Viewer. Users will receive an error message indicating that persistent highlighting is unavailable if they are using an incompatible version of the Viewer.

### 6.3 Entering highlight terms

If you choose **Terms** as the source of your highlighting, you will have to enter them in the Terms field text box in order to save the new highlight set. You also have the option of specifying color-coding to these terms to make them appear in your desired colors in the Viewer.

![Persistent Highlight Set Information](image)

### 6.3.1 Color-coding persistent highlights

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

```
[background color];[text color];[term to be highlighted]
```
For example, enter “3;16;Relativity” to highlight Relativity with dark green background and white text. The following table includes available color codes.

<table>
<thead>
<tr>
<th>Color name</th>
<th>Color</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Default]</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>Black</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Dark red</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>Dark green</td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>Dark yellow</td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>Dark blue</td>
<td></td>
<td>5</td>
</tr>
<tr>
<td>Dark magenta</td>
<td></td>
<td>6</td>
</tr>
<tr>
<td>Dark cyan</td>
<td></td>
<td>7</td>
</tr>
<tr>
<td>Light gray</td>
<td></td>
<td>8</td>
</tr>
<tr>
<td>Gray</td>
<td></td>
<td>9</td>
</tr>
<tr>
<td>Red</td>
<td></td>
<td>10</td>
</tr>
<tr>
<td>Green</td>
<td></td>
<td>11</td>
</tr>
<tr>
<td>Yellow</td>
<td></td>
<td>12</td>
</tr>
<tr>
<td>Blue</td>
<td></td>
<td>13</td>
</tr>
<tr>
<td>Magenta</td>
<td></td>
<td>14</td>
</tr>
<tr>
<td>Cyan</td>
<td></td>
<td>15</td>
</tr>
<tr>
<td>White</td>
<td></td>
<td>16</td>
</tr>
</tbody>
</table>

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

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

### 6.3.2 Guidelines for adding terms or phrases

Use the following guidelines when adding terms or phrases:

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

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

  **Note:** Quotation marks are not compatible with persistent highlighting, which automatically searches for an exact phrase. You don't need to use quotation marks, which will result in slower document loading speeds.

- Keep lists simple. Do not use punctuation, special characters, operators, or dtSearch syntax.

  - **Operators** including “AND” or “OR”, are not utilized as in keyword searching. If used, Relativity will look for the exact phrase including “AND” or “OR”. For example, you entered these search terms: Apple AND Banana. Relativity would highlight the entire phrase “apple and banana” in the document. Separate occurrences of apple, and occurrences of banana would NOT be
highlighted.

- **Wildcards** are supported in persistent highlight set terms. You can view highlighted terms that contain a * (asterisk) character, including a wildcard in the middle of a term. For example:
  - term* matches and highlights any word that starts with "term" with zero or more following characters.
  - *term matches and highlights any word that ends with "term" with zero or more preceding characters.
  - *term* matches and highlights any word that has "term" in it with zero or more preceding or following characters.

- Do not enter duplicate terms.
- Identify and remove terms with large hit counts.
- List variations of a term first and enter the root term last.
- If the list of terms is large (>100 terms), use Highlight Fields with a Search Terms Report.

### 6.4 Using the highlight fields source

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

Select the Highlight Fields source, then click the to open the field picker on Persistent Highlight Sets system view. This system view displays the Name and Object Type for applicable multiple object fields, including those created by Search Terms Reports.

**Note:** Persistent highlights generated by a Search Terms Report don't automatically update after you load new data into a workspace. You must rebuild the dtSearch index to incorporate the text from new documents.

In the following example, the picker view shows all completed Search Terms Reports in the workspace of the Report and Tag type. To select a Highlight Field, check the field’s box, click Add followed by Set. The field appears on the layout.
When using a Search Terms Report as the highlight fields source, the number of terms that Relativity searches for will vary among different records. Relativity only looks for the terms listed in the Search Terms Report for that document.

The application highlights only the terms in the STR field created by the Report and Tag Search Term Report for each document.
6.4.1 Best practices

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

- Enter terms exactly as they appear in the document.
- Do not use operators such as AND and OR. Operators including “AND” or “OR,” are not used in keyword searching. If used, Relativity will look for the exact phrase including “AND” or “OR.” For example, if you entered these search terms: Apple AND Banana, Relativity would highlight the entire phrase “apple and banana” in the document. Separate occurrences of apple, and occurrences of banana would NOT be highlighted.
- Wildcards are useful in some cases. For example, the search term appl* will highlight apple, application, applies, and so on. An excessive use of wildcards will affect performance. Leading wildcards such as *itting, are not recommended. Using asterisks in the middle of a term will not count as wildcards.
- Avoid using advanced dtSearch functionality, including proximity, stemming, and fuzziness.
  - Persistent highlighting does not understand proximity searching. If you enter the phrase “Relativity w/5 kCura” as a search term, the search term report will use a dtSearch to find and tag all documents that meet those criteria. However, persistent highlighting will function differently than the dtSearch, as it will look for the term Relativity, a space, the letter w, any special character (instead of “/“), the number 5, a space, and then the term kCura.
  - Persistent highlighting does not understand the stemming character (“~). If you enter the term “apply~” as a search term, the search term report will find and tag all documents with the word apply, or any document that stems from apply, including applied, applies, application, and so on. However, persistent highlighting will look for the term “apply” followed by any special character, so you will not see the expected terms highlighted.
- In Search Terms Reports, you can work around these limitations by using the Dictionary Search function to identify search terms using stemming or fuzziness. Copy the list of terms returned in this search. Paste them in the Add Terms box on the Search Terms Report form. You will enhance your search term
list, while avoiding errors caused by special characters.

6.5 Importing search terms for persistent highlighting

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

6.5.1 Relativity component setup

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

1. Navigate to the Object Type tab in your workspace.
2. Click New Object Type.
   a. Provide a name for the new object in the required Name property.
   b. Keep all remaining properties at their default values.
   c. Click Save.
3. Navigate to the Fields tab.
4. Click New Field to create the field that will hold the persistent highlight color information and that will connect your Dynamic Object to the Document object.
5. In the New Field form, specify the following properties:
   a. **Object Type**: <Dynamic Object created in step 2>
   b. **Name**: Highlight Color
   c. **Field Type**: Fixed-Length Text
   d. **Length**: 10
   e. Keep all remaining properties at their default values.
   f. Click **Save and New**.

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

7. Navigate to the **Persistent Highlight Sets** tab in your workspace.
8. Click **New Persistent Highlight Set**.

9. Create a new set with the following properties:
   a. **Name**: <User preference>
   b. **Order**: <User preference>; this controls the position of this set in the Persistent Highlight Tree in the Viewer.
   c. **Source**: Highlight Fields
   d. **Highlight Fields**: <The name of the field created in step 6b.>
   e. Click **Save**.

### 6.5.2 Importing terms

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

1. Open the **Relativity Desktop Client**.
2. Select the workspace you are importing into.
3. Select the Dynamic Object you created above from the object drop-down menu.
4. Select **Tools** from the top menu.
5. Select **Import** | **<Dynamic Object>** load file.
6. Select your terms load file and corresponding delimiters.
7. Map the field in your load file that contains the terms to the Name field in Relativity.
   Here you can also import Relativity Highlight Color. You must have this information in the load file contained in a field in the following format: text color; highlight color (for example, 15;9). If you do not have this information in the load file, you can manually enter it for terms in Relativity. Because the latter can be time consuming, we recommend having this information in the load file if possible.
8. Click **Import** to import the terms.
9. Navigate to the object tab you created in step two of the Relativity component setup section.
10. Click on a term.
11. Select the layout you want to use from the drop-down menu.
12. Click the pencil icon to edit the layout.
13. Click **Add Associative Object list**.
14. Use the drop-down menu to select the field you created in 6b of the Relativity component setup section.
15. Set the View field to your preferred document view.
16. Set the Link View field to your preferred document view.
17. Click Save.
18. Click Link.
19. Select all documents.
20. Click Add.
21. Click Set.
22. Repeat steps 10 through 22 on each term.
23. Verify that the terms are highlighted through the following:
   a. Open a document in the workspace.
   b. Open the Persistent Highlight Tree in the Viewer.
   c. Note the presence of the newly created Persistent Highlight Set and verify that terms are highlighted in the appropriate colors.

### 6.6 Creating efficient searches for persistent highlighting

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

Avoid the following when writing searches for persistent highlighting:

- Do not use "AND" or "OR" connectors. Persistent highlighting will look for the exact phrase "trade and complete" instead of the word "trade" and the word "complete."
- Do not use proximity, fuzziness, and stemming search logic. The system ignores the dtSearch syntax. Your terms will not be highlighted if you use these advanced searching features, even though the search terms report Count column lists the number of matching terms. For example:
  - The search term “oil w/10 water” will highlight the term “oil” and the term “water,” even if they are not within 10 terms of each other.
  - If you enter the term “apply~” as a search term, persistent highlighting technology will look for the term apply followed by any special character, so you will not see expected terms highlighted.
- Avoid using terms with a large number of hits per document because persistent highlighting will highlight each hit. For example, it will take longer to load a Word document containing 1,000 instances of a single term or an Excel document with a high frequency of the same number.
- Avoid using terms that only occur once in a document. Use search terms reports for those terms so that they do not strain the system searching each document.
- Avoid long lists of numbers, such as Bates numbers or account numbers. They can bloat the search.
- Do not use duplicate terms.

Use the following techniques to optimize your searches:

- Use the dtSearch Dictionary to identify variations of a term instead of using wildcards.
  - Identify which terms should be in the highlight set and which terms are not necessary.
  - You may want to avoid highlighting terms with high word counts.
Note: To highlight terms using objects, create a fixed-length text field for your object called Relativity Highlight Color. You can enter color-coding in this field using the format: [highlight color];[text color].

7 Search terms reports

A search terms report simplifies the process of identifying documents that contain a specific group of keywords. Instead of running complicated queries, you can use a search terms report to enter a list of terms or phrases and then generate a report listing their frequencies in a set of documents. You can determine the output of the report by selecting one of the following type options:

- **Report Only** - Creates a report that includes the number of hits for each term or phrase. (A hit indicates one or more uses of the term or phrase in a document.)
- **Report and Tag** - Creates a report that includes the number of hits for each term or phrase in addition to the following:
  - Creates a multiple object field named after the search term report with the prefix STR.
  - Tags the documents using the multiple object field with the search term(s) found.

You can also use the field created with the report and tag option in your persistent highlight sets. When you select a search terms report for use with a persistent highlight set, the report determines which terms or phrases are highlighted in the documents viewed through the core reviewer interface.

**Using search terms reports**

You’re a Relativity system admin at a law firm and one of your clients, a construction company, is involved in litigation regarding the use of materials that they weren’t informed were potentially environmentally damaging when they purchased them from a major supplier.

There are roughly three million files related to this case, including emails, email attachments, invoices, and technical manuals related to construction practices and material handling.

Before you begin review, you want a report that tells you how many times the names of toxic substances appear in the documents. To get this, you create a new search terms report. You give it a name congruent with a number of the other objects you’ve created for this case, "Hazardous Materials search terms report.” For the Index field, you select the dtSearch index you already created for your reviewers. Since you don’t need to actually tag the documents that contain the terms you want to include, you select the Report Only option for the Type field. For the Searchable Set field, you select the set of documents you specified when you created the saved search for the dtSearch index data source. Finally, in the Add Terms field, you enter the substances you want reported on, which are the same ones included in your client’s lawsuit and the same ones for which you’ve already created choices for an issue coding field. These terms are:

- lead
- asbestos
- asphalt
- radioactive isotopes
You save and run the report and the results tell you how prevalent these terms are syntactically represented in the data set that your reviewers are about to start reviewing. You now have a better idea of what lies ahead.

### 7.1 Guidelines for using search terms reports

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

- Define a saved search using conditions that return the required group of documents for the **Searchable Set**. Persistent highlighting applies only to documents in the searchable set. If including relational group, only related items in the searchable set are counted.
- Confirm that the dtSearch used for the search terms report has been used to index all the documents in the **Searchable Set**.
- Select **Report and Tag** in the **Type** radio button list for the report. If you don’t select this option, then a multiple object field isn’t created for the search terms report, and you can’t select it in the **Highlight Fields** option when creating a persistent highlights set. See [Persistent highlight sets on page 33](#).
When you use search terms reports for persistent highlights, only the terms in documents associated with the current reports appear highlighted. If you add new search terms to the reports, you must run pending terms so that they appear highlighted in documents.

7.2 Creating a search terms report

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

1. Click the Search Terms Report tab.
2. Click New Search Terms Report.
3. Complete the fields on the form. See Fields below.
4. Click Save.

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

7.2.1 Fields

Search terms reports contain the following fields:

- **Name** - the search terms report’s name.
- **Index** - the index used to create the report. Select only dtSearch indexes.
- **Searchable set** - a saved search that includes the set of documents used to create the report.
- **Type** - select one of the following options:
  - **Report and tag** - creates a report that includes the number of hits for each term or phrase in addition to the following:
    - Creates a multiple object field named after the search term report with the prefix STR, i.e. STR - Industry terms.
    - Tags each document containing search hits using the STR multiple object field with the search term(s) found in each document.
  - **Report only** - creates a report that includes the number of hits for each term or phrase.
- **Calculate unique hits** - if set to Yes, this setting includes a Unique hits value for each term in the search terms results. Unique hits is the count of documents in the searchable set returned by only that particular term. If more than one term returns a particular document, that document is not counted as a unique hit. Unique hits reflect the total number of documents returned by a particular term and only that particular term.

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

- **Include relational group** - includes the “Documents with hits, including group” counts for each term in the search terms results. This value counts the documents with hits for each term as well as all documents in the same relational group as the documents with hits. Include relational group only includes hits of related items in the searchable set. It will not look outside of the searchable set. Click the ellipsis and select a relational group to include.
7.2.2 Adding or editing terms and highlight colors

To add or edit terms for your search terms report:

1. You must create a Persistent highlight set for highlighted terms to appear in your documents. See Persistent highlight sets for more information.
2. To open the terms management screen, click the Modify Terms button.
3. To add new terms, enter your terms in the large text box under the New Terms heading so that each term appears on a separate line.
   Alternatively, click the Dictionary link to display the Dictionary Search pop-up, where you can perform searches using fuzziness levels and stemming. See Running a Dictionary search in the Searching guide. Click Copy to List to add the Dictionary search results to the New Terms text box.

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

4. To move your new terms to the existing terms list, click Add Terms. A single term has a character limit of 450. A confirmation message displays with the count of new terms added and duplicate terms ignored.

5. (Optional) To change the background color and text color for one or more of the terms, select the checkbox next to the term(s) and select the background color and text color using the drop-down menus. See the preview text to verify that the resulting highlighted text is readable. Click Apply Color.

   Note: By default, highlighted terms appear as black text with a magenta background.

6. To return to the search terms report screen, click Done.

After adding new search terms to an existing report, you must run the terms so that they appear highlighted in documents. See Running a search terms report on the next page for details.

7.2.3 Deleting terms

To remove terms from the search terms report:

1. To open the terms management screen, click the Modify Terms button.
2. Under Existing Terms, select the checkbox next to the term(s) you want to remove.
3. Click Delete.
4. To return to the search terms report screen, click Done.

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

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

The console includes the following options:

- **Modify Terms** - opens the terms management screen. On this screen, you can add new terms to the report, apply text and background highlight colors, and delete existing terms from the report.
- **Run All Terms** - generates counts for each term. Use this option when generating the report for the first time or if you want to regenerate counts for all terms in the report. Run all terms after adding new documents to the searchable set. See Search terms reports on page 48.
- **Run Pending Terms** - updates an existing report. It runs a report on only those terms with a Pending status.
- **View Results** - opens the Search Terms Results page. This page displays the report results, listing the number of document hits for each term.
The Search Terms Results page provides the following:

- **Name** - search term included in search terms report.
- **Documents with hits** - the number of documents in the searchable set that contain the search term.

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

- **Documents with hits, including group** - counts the documents with hits for each term as well as all documents in the same relational group as the documents with hits. The count only includes hits of related items in the searchable set. It will not look outside of the searchable set.
- **Unique hits** - counts the number of documents in the searchable set returned by only that particular term. If more than one term returns a particular document, that document is not counted as a unique hit. Unique hits reflect the total number of documents returned by a particular term and only that particular term.
- **Last run time** - timestamp when the search terms report last ran.

- **View Term Report** - In the Search Terms Report console, click **View Term Report** to open the graphical search terms report. You can print or save the report. To save, select a file type at the top of the report.
- **Retry Errors** - attempts to regenerate the report for search terms that returned error messages.
- **Refresh Page** - updates the information displayed on the page.

### 7.3.1 Search terms report status

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

- **Number of terms** - total number of terms run in the search terms report.
- **Documents in searchable set** - total documents in the designated searchable set.
- **Total documents with hits** - the number of documents in the searchable set that contain the search term.
- **Total documents with hits, including <relational group name>** - counts the documents with hits for each term as well as all documents in the same relational group as the documents with hits.

### 7.4 Accessing tagged documents using the Field Tree browser

After you run a search term report with the **Report and Tag** option enabled, Relativity creates a folder in the Field Tree browser with documents grouped by tags found by the search term report. The folder is named after the STR multiple object field created by the search term report.

Click a search term tag in the Field Tree browser to view documents in your searchable set tagged with the selected term.
7.5 Using tagged search terms in a saved search

After you run a search term report with the Report and Tag option enabled, Relativity creates choices for each of the terms that you specified. You can then use these choices as criteria in a saved search. You must add each of the search terms separately to the saved search to return the correct results.

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

1. Follow the instructions for setting fields in the Information and Search Conditions sections on a saved search.
2. In the Conditions section, select your search term report in the Field box and select a condition in the Operator box.
3. In the Value field, click to display the Select STR dialog.
4. On the Select STR dialog, perform these tasks:
   a. In the Field box, select your search term report.
   b. Select an Operator, such as any of these.
c. Click to select a single search term on the Select Items dialog.

**Note:** If you select multiple tagged search terms on this dialog, your saved search won’t return the correct results.

d. Set any other fields as necessary.

5. Click **OK**. If you added the tagged search terms called money, power, and oil, the Conditions section would appear as follows:

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

7. Click **Search** to run your query.
8 Searching overview

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

Filters

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

Keyword searches

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

Saved searches

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

dtSearches

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

Analytics

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

Additional features

Relativity provides additional features that make searching easily accessible from the Documents tab. With the search condition option, you can build queries using the same condition options available for saved searches. You can click Save as Search on the Documents tab to create saved searches based on the criteria defined for keyword searches, dtSearches, Analytics, or the search conditions option. See the Searching Guide for more information.

8.1 Search conditions

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

For search condition rules and an explanation of expected search behavior when applying search conditions to Long Text and Fixed-Length Text fields using the is, is like, is not like, or is not operators, see the Search condition rules in the Searching Guide.

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

To set up search conditions, follow these steps:

1. Navigate to the Documents tab or to a Dynamic Object tab.
2. Click to display fields for a search condition. The search conditions icon's appearance changes when conditions are active.
3. Set the following options to define a search condition:
   - **Left or Opening Parentheses** - Use the first box in the row to select a single, double, or triple parentheses for grouping criteria or controlling precedence in the query.
     
     Note: To enable this menu, you must first select a value for **Field**.
   - **Field** - Select a field available in your workspace.
   - **Operator** - Select a search operator. The field type determines the available operators. See Operators in the Searching guide.
   - **Value** - Enter or select a value. The field type determines the available values.
     
     Note: With date-based fields, you can enter @today as the value instead of choosing a date if “is before” or “is after or on” operator is selected.
   - **Right or Closing Parentheses** - Use the last box in the row to select a single, double, or triple parentheses to group criteria.
   - **AND or OR Operators** - Use these operators to connect the criterion in each row.

   To remove your current selections for a condition, click the **Clear** link for the row.

4. (Optional) Click **Add another condition** to display another search condition row. Repeat Step 3 to set the options in the new row. You can set a total of five conditions with the search conditions option. If your query requires more than five conditions, create a saved search. Creating a saved search in the Searching guide.

5. Click **Search**.

6. (Optional) Perform any of the following tasks to work with your search:
   - **Hide Search Conditions** - Click **.** A message appears above the item list indicating that the search conditions are active.
   - **Save Search Settings** - Click **.** See the Searching guide.
   - **Remove Search Settings** - Click the **Clear** button to remove the current conditions and any search type settings.

**8.1.1 Canceled queries**

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

When you click **Cancel Request**, Relativity stops the background query used to populate documents in an item list. If you edit a search and click this link, your changes save, but the item list doesn't load. For example, your changes save when you perform a mass edit on a list of documents in a search and then click **Cancel Request** when the query is running to redisplay the updated list.
Note: Relativity creates an audit record in the History tab for canceled queries. The query description displays the running time of the query and indicates that it was canceled. You must have the appropriate permissions to view this tab.

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

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

**8.1.2 Frequently asked searching questions**

This section includes frequently asked questions from Relativity users.

**8.1.2.1 Multiple Terms**

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

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

**8.1.2.2 Proximity Searches**

**Why are terms in my proximity search highlighted even when they don't match my defined W/N criteria?**
Relativity highlights terms that meet the requirements of your proximity search as well as the individual search terms. This behavior doesn't affect the results of your proximity search, which returns the appropriate documents. For example, the results of a proximity search for instances of law within three words of order (that is "law W/3 order") includes highlighted terms of "law" and "order" when they aren't within three words of each other. To accommodate this behavior, focus only on the results that match the proximity search criteria, and disregard the other highlighted terms.

8.1.2.3 Using ampersands

Can I use an ampersand (&) in my search queries?

Overall, searching with the & character is unpredictable and gives inconsistent results. Although the & character is in the search index as a space character, it's also reserved as an operator in dtSearch and can skew search results. In order to get the most accurate results when searching with the & character is to search with proximity instead. Searching with the & character as a dtSearch operator returns search results as expected.

8.1.2.4 Multiple Conditions

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

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

8.1.2.5 Nesting Searches

Can I nest multiple searches in a saved search?

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

9 Summary reports

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

- Multiple-choice list
- Single-choice list
- User
- Yes/No
The reports are based on an optional grouping criterion (the vertical axis) and the fields to be tallied (the horizontal axis).

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

### Using summary reports

Imagine you’re a system admin, and the review manager for your firm requests metrics on the job performances of reviewers. You want to be able to track the effectiveness of each reviewer by retrieving information about how many documents he or she reviews per day along with how many they code as responsive, not responsive, or unsure.

You create a summary report that lists the number of documents reviewed by the reviewers and export the report to excel to pass on to the manager.

### 9.1 Creating and editing a summary report

To create a summary report, follow these steps:

1. Click the **Summary Reports** tab.
2. Click **New Summary Report**, or if you’re editing an existing summary report, click **Edit**.
3. Complete the fields on the form. See **Fields on the next page**.
4. Click **Save**.
9.2 Fields

- **Folders** - located in the browser to the left of the form, folders allow you to specify the scope of the report. You can report on the entire case workspace or only on specific folders and subfolders.
- **Name** - the title of the summary report.
- **Group By** - an optional field that allows you to select a grouping criterion for the report. Grouping criteria appear as rows on the report.
  - Leave the group by field blank to display only a summary with no grouping.
  - Click to select your grouping condition.

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

- **Report on subfolders** - a yes/no field that allows you to report on just a folder or a folder and its subfolders. Defaults to "Yes," which reports on folders and their subfolders.
- **Columns** - allows you to select which fields are tallied. Selected fields are displayed as columns on the report.
○ **Add Columns** - allows you to add columns to the report. Click the **Add Columns** button and select the checkbox for each field you want to tally. You can use filters to quickly find the desired fields. Only multi-choice list, single-choice list, user, and yes/no fields can be reported on.
○ **Remove selected columns** - allows you to remove fields from your columns section.

## 10 Tabs

A workspace contains tabs that provide you with easy access to different Relativity features, including documents, search terms reports, views, and other default functionality. Relativity is a highly customizable platform. You can apply any template with a tabs arrangement that best serves your review needs. Some workspace templates also include custom tabs for specialized functionality.

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

In addition, Relativity automatically creates a tab when you add a new object type. If you are developing a custom application, you may want to obtain the globally unique identifier (GUID) for a tab. For information about obtaining GUIDs, see Basic concepts for the application framework on the Relativity 9 Developers site.

### Using tabs

You’re an admin facilitating a document review project involving thousands of patients whose private personal health information was stolen during a security breach.

You’re in the process of creating an application for tracking the many attorneys associated with this litigation, and you want to add to this application a list of all the law firms where these attorneys work to go along with the master list of attorney names you’ve already created.

To do this, you want to create a new tab to hold the names of these law firms. You go to the Tabs tab and create a new tab with a name of Law Firms and an order of 10. You keep the Link Type field at its default value of Object. For the Object Type field, you select the Law Firm object type, which you just created as one of the several objects that will make up the application you’re creating.
Once you save the Law Firms tab, you can now populate it with the names of firms that employ the many attorneys involved in your case.

10.1 Creating and editing tabs

To create or edit a tab, follow these steps:

1. Click the Tabs tab.
2. Click New Tab. If you're editing an existing tab, click Edit.
3. Complete the fields on the form. See Fields on the next page.
4. Click Save.
10.2 Fields

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

- **Order** - represents the position of the tab by a numerical value. It can be any positive or negative integer. No decimals are allowed. The lowest-numbered tab will be the leftmost tab. The highest-numbered tab will be the rightmost tab. Items that share the same value are sorted in alphanumeric order.

  **Note:** It’s always a good idea to set Tab Order by 10’s, starting with 10, then 20, then 30, etc. Numbering in groups of 10 allows you to insert an item into any position later in the workspace, without the need to reorder (such as 10, 20, 25, 30, 40).

- **View Order** - when clicked, displays a list of active tabs and their current order.

- **Link Type** - determines the type of tab you want to create:
  - **Object** - creates a tab for a non-document object in your workspace.
  - **External** - allows you to link to any URL or any Relativity Dynamic Object.

  **Note:** Selecting External from the Link Type menu causes the Link field to appear below the Parent field. In the Link field, you can enter a web address to link to a URL.

Alternatively, you can link to a Relativity Dynamic Object by entering the Artifact ID or the GUID for that object. Use the following format to link to a Relativity dynamic...
object: **ObjectArtifactIdentifier=[identifier]**, where [identifier] is the Artifact ID or GUID of the Dynamic Object. For example, **ObjectArtifactIdentifier=1039242**.

Use the following text replacement options to customize the URL, allowing you to display current details about your workspace:

<table>
<thead>
<tr>
<th>Text Replacement Option</th>
<th>Replacement Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>%ApplicationPath%</td>
<td>The actual application path</td>
</tr>
<tr>
<td>%AppID%</td>
<td>AppID=&lt;Current Workspace ID&gt;</td>
</tr>
<tr>
<td>%AuthenticationToken%</td>
<td>AuthenticationToken=&lt;New Authentication Token&gt;</td>
</tr>
<tr>
<td>%artifactTypeID%</td>
<td>ArtifactTypeID=&lt;Current ArtifactTypeID&gt;</td>
</tr>
<tr>
<td>%parentArtifactID%</td>
<td>ParentArtifactID=&lt;Current Parent ArtifactID&gt;</td>
</tr>
<tr>
<td>%associatedArtifactID%</td>
<td>AssociatedArtifactID=&lt;Current Instance Artifact ID&gt;</td>
</tr>
<tr>
<td>%connectorfieldartifactid%</td>
<td>ConnectorFieldArtifactID=&lt;Current Connector Field Artifact ID&gt;</td>
</tr>
</tbody>
</table>

In addition, you can modify the URL of an external tab when you want to create a link to custom page containing HTML5. Append a question mark (?) followed by the token **StandardsCompliance=true** to the URL. See the following sample URL for a custom page using HTML5:

```
%ApplicationPath%/custompages/626bb65e-6143-4cd1-86b7-3a48737b06e6/679-Project1-master/index.html?StandardsCompliance=true
```

For more information about custom pages, see [Basic concepts for custom pages](#) in the Relativity Developers site.

**Note:** Support for HTML5 markup elements varies by the version of Microsoft Internet Explorer (IE) that you are using. For more information about supported tags, see the recommendations for your browser version.

- **Parent** - establishes the tab as a parent tab. This allows existing tabs to be set as children of the parent tab, thereby creating a drop-down tab structure. Selecting this changes the layout by hiding the Parent, Object Type, and Is Default fields and bringing up the required **Tab Display** field.
- **Tab Display** - determines whether the child tabs of this parent will display in a horizontal or a vertical arrangement. See the images after this section for an example.

- **Parent** - allows the tab to be placed as a child tab in the drop-down list of any parent tab.
- **Object Type** - determines which object’s information is displayed in the tab for those specified as **Link Type = Object**.
- **Is Default** - allows the tab to serve as the workspace’s default tab. Reviewers logging into the workspace are taken to the default tab. If a reviewer does not have access to the default tab, he or she is directed to the Documents tab.
- **Is Visible** allows you to select this tab from the tab menu. Setting this to No allows you to create a new tab to be used in an application with a horizontal tab structure.
- **Relativity Applications** - allows you to add this tab to a Relativity application. Clicking ![3] brings up a list of available applications.
This is an example of vertical tab display:

![Vertical Tab Display](image1)

This is an example of horizontal tab display:

![Horizontal Tab Display](image2)

### 10.3 Nesting tabs

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

1. Create a new tab with a Link Type of Parent or edit an existing tab.
2. Click the **Edit** link next to the tab you want to nest.
3. Under the **Parent** drop-down menu, choose the parent tab name.
4. Click **Save**.

Repeat for each tab you wish to nest. Nested tabs reside in the drop-down menu of the parent. The tab will disappear from the tab strip and reside below the new tab.
11 Transcripts

ASCII transcripts are a type of document you can load into Relativity and review just like any other type of document. Working with transcripts in Relativity allows you to use three unique features including: creating word indexes of terms in a transcript, linking to related documents in a workspace from within a transcript, and inline tagging to add identifiable reference terms to specific content in a transcript. When processing transcripts, you also have the option to add or remove header and footer content to and from your transcripts.

**Note:** Relativity accepts only ASCII transcripts.

**Note:** You can’t print highlights and redactions on a native transcript in the HTML viewer. In order to do this, you must revert to the ActiveX viewer.

### Using transcripts

You’re an attorney and have a copy of the deposition from the defendant in the form of a transcript. Some of the statements made during the deposition conflict with statements made in certain emails sent by the defendant.

You load the transcript into Relativity and link each statement in the transcript to the conflicting email and prepare your cross examination.

11.1 Importing transcripts

Importing transcripts into Relativity is the same process as importing any other type of native file. Use the Relativity Desktop Client to import transcripts with a load file. See Importing document metadata, files, and extracted text in the Desktop Client guide.

11.2 Links

Links are references to other documents in your workspace. You can only add links within transcripts, but you can link to any other document type. Linked text appears green in the transcript.
11.2.1 Adding a link to a transcript

Before you can create a link, you have to process the transcript. See Process transcripts in the Admin guide.

To add a link to a transcript:

1. Open a transcript from the Documents tab.
2. Highlight the text you want to hyperlink.
3. Right-click on the selected text, and click Link.
4. Select the radio button next to the document you want to link to.
5. Click Set.

Note: All links on the transcript appear in the related items pane.

12 Viewer

Relativity's viewer displays workspace documents. You can use the viewer menu to toggle the loaded formats of documents, such as native, image, extracted text, or production. Using the viewer, you can control the form of document that displays in the interface. If a document hasn't been imaged, you can image documents on the fly in the viewer.

If you don't see the document in the viewer, it either hasn't been loaded to the workspace, its conversion failed, or you don't have permission to see it.

Note: In all applicable modes of the viewer, you can collapse an email header if the email header field contains more information than can be displayed on a single line. If you collapse or expand an email header, the viewer maintains the expanded or collapsed state as you move through documents in the set.

For information on working with transcripts in the viewer, see Transcripts on the previous page.
Using the viewer

Imagine you're a reviewer and your manager assigns you a batch of 50 documents to review. You open the batch and see a list of 50 Word documents, Lotus Notes files, and Outlook emails. Unfortunately, you don’t have any of those applications installed on your computer, so you have to rely on Relativity’s viewer to open the documents.

Without the viewer you would need to have each file's native application installed locally on your machine, and even then the data might become corrupted by opening the files within their respective software applications by changing the date modified. But the viewer allows you to easily review any of these various file types without launching each relevant application while preserving the metadata.

You open the first file, an .NSF file, and recognize it as a Lotus Notes file. When you open it in the viewer it doesn’t render the document appropriately, so you click the Native radio button at the top. That displays the document how it would display in Lotus Notes, and you’re able to make your coding decision.

12.1 Viewer mode

Viewer mode displays an HTML rendering of the document that is as close to the original version of the document as possible. Viewer mode provides options for navigating through a single document and between documents in a document set and allows for text searching, highlighting, zooming, arranging, and saving pages you review.

When you open a document that has not yet been imaged, you have the option to image the document on the fly while in Viewer mode. For more information, see Imaging on the fly on page 83.

**Note:** Beginning in Relativity 9.0, you can view files that are password protected in Viewer mode if those files are run through a processing or imaging set and the password is in the password bank. For more information, see the Password bank section of the Processing User Guide.

Viewer mode provides the following toolbar options:

**Note:** Relativity automatically hides toolbar buttons and controls that aren’t applicable to the currently loaded document type so that your toolbar isn’t cluttered while you’re reviewing documents.

- Show/Hide Persistent Highlight Pane - displays or hides a panel containing all persistent highlight sets in the workspace.
- **Zoom Out/In** - zooms out and in on the current document in increments of 10% within a range of 10% to 500%. If you attempt to zoom out to a percentage lower than 10%, the viewer automatically sets the display to 10%. If you attempt to zoom in to a percentage higher than 500%, the viewer automatically sets the display to 500%. Your zoom setting persists as you navigate through a document set. This means that if you’ve set one document to 150% and you go to the next document, the next document defaults to 150% zoom.

To specify a zoom percentage without using the zoom out/in toolbar buttons, type the number in the percentage field and press the Enter key.

- **Reset Zoom** - resets the zoom to 100%.
- **Find Previous/Next** - searches for terms in the current document and navigates through the hits.
  - Entering a term and either clicking the left or right arrow button or pressing Enter in this text box scrolls to and highlights the text of the next instance of the term (from the placement of the cursor).
  - Searching in this text box is not case sensitive
  - Search results match partially-entered words.
  - Matching is done on the literal character typed into the search-box, including non-alphanumeric characters. This means that the viewer doesn’t treat non-alphanumeric characters as wildcards.

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

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

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

- **Save as PDF** - gives you the option of saving the current native document as a PDF file. Clicking this option opens the following window, in which you must click **Save as PDF** again to save the document as a PDF. Note that the options for saving an image as a PDF are different than for a native.
**Note:** You can't print highlights and redactions on a native transcript in the HTML viewer. In order to do this, you must revert to the ActiveX viewer.

After you click **Save as PDF**, a copy of the document converts to a PDF file you can save from your web browser downloads.

![Save Document as PDF](image)

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

- **Go To Next/Previous Highlight** - moves through previous and next highlighted terms in the document.

- **About** - displays the version of the native file converter that converted the document when you opened it from the document list, the native document viewer version, and the latest installed version of the native document viewer. The icon is red if a version is out of date.

![About the Viewer](image)

- If the "native document viewer version" doesn't match the "document converted by version", you'll receive a conversion mismatch warning when you try to view a document in the viewer. If you receive this, contact your System Administrator, as an upgrade may be required.
12.1.1 Copying text in the viewer

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

To do this:

1. Highlight the text you want copied.
2. Right-click and select Copy from the menu.
3. Copy the text from the Copy Text window with another right-click and Copy or a Control+C or Com-
mand+C keyboard command.

You can't copy text if you:

- Haven't highlighted any text.
- Don't have permission to the Local Access option on the Document object. This is the same permission that allows you to open the file in its native application. For more information, see Object list in Relativity Admin guide.

### 12.2 Native mode

When you switch to **Native** mode, you're downloading or opening a document in its native form. This option is only available if a native copy exists in Relativity for a document open in the viewer. If
you don't see this option in the viewer, you may not have sufficient permissions or the Prevent Native Download setting for that particular file type has been set to Yes.

To switch to Native mode, click **Native** on the mode menu.

Note that your options for interacting with a document in Native mode are limited, in that the options available in Viewer and Image modes aren't available in Native mode.

### 12.3 Image mode

When you switch to **Image** mode, the viewer displays a TIFF or JPEG version of the document. You can highlight and redact images in this mode. Image mode is available only if you've loaded an imaged version of the document in the viewer or if you've manually imaged the file through the **Image** button on the right side of the toolbar.

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

The viewer displays the following icons for the image version of the document:

**Note:** Relativity automatically hides toolbar buttons and controls that aren't applicable to the currently loaded document type so that your toolbar isn't cluttered while you're reviewing documents.
- **Show/Hide Thumbnails** - displays a thumbnail version of the document in a new pane on the left side of the viewer. Each page of the document you're reviewing has its own numbered thumbnail.

- **Zoom Out/In** - zooms out and in on the current document in increments of 10% within a range of 10% to 500%. If you attempt to zoom out to a percentage lower than 10%, the viewer automatically sets the display to 10%. If you attempt to zoom in to a percentage higher than 500%, the viewer automatically sets the display to 500%. Your zoom setting persists as you navigate through a document set. This means that if you've set one document to 150% and you go to the next document, the next document defaults to 150% zoom.

To specify a zoom percentage without using the zoom out/in toolbar buttons, type the number in the percentage field and press the Enter key.

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

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

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

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

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

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

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

- **Save as PDF** - gives you the option of saving the image as a PDF. For more information, see Saving an image as a PDF on the next page.

- **Selector** - select within a document.

- **Highlight** - highlights the selected text with the color you specify from the drop-down. The default color is yellow. Select from the following:
  - Pink
  - Orange
  - Yellow
  - Green
- Blue
- Purple

- **Redact - <Style>** - enables single redaction tool. For more information on redacting, see *Creating basic redactions on page 27*. Select from the following types of redactions:
  - **Black** - applies a solid black box to the selected text.
  - **Cross** - applies a white box with an X in the middle of it over the selected text.
  - **Text** - applies a box over the selected text, in which you can add text such as "Privileged" or "Redacted."
  - **White** - applies a solid white box over the selected text.

- **Redact - Inverse** - enables the inverse redaction tool. For more information, see *Creating inverse redactions on page 27*.

- **Redact - Full page** enables the full-page redaction tool. The drop-down menu for this redaction type offers the same options as the basic Redact icon, except that the redaction you choose will be applied to the entire page. For example, if you select White, the entire page will become white. For more information, see *Creating full-page redactions on page 28*.

- **Mass Redact** - allows you to apply a full-page redaction across all images or a range of images in the document. For more information, see *Creating mass redactions on page 28*.

- **Font Size** - allows you to change the font size of the text within a text box redaction. For more information, see *Editing font size in text box redactions on page 31*.

- **Delete Redactions and Highlights** - allows you to mass delete markups from any or all images in the document. For more information, see *Mass deleting markups on page 31*.

- **Markup Visibility** - changes the visibility mode of the markups between full visibility, transparent and hidden. By default, this is set to Solid, which means all highlights and redactions appear as solid as you applied them. For more information, see *Controlling markup visibility on page 32*.

- **Delete Images** button - click to delete an existing document image.

**Note:** If you don't have permission to the Local Access option on the Document object, you can't use the Ctrl+C or Ctrl+Ins options in either Viewer or Extracted Text mode.

### 12.3.1 Saving an image as a PDF

Clicking this icon brings up the following window, in which you can specify your PDF settings:
**Print range** - select from the following standard print range options:

- All images - saves all images in the document.
- Current image - saves only the image you're currently on.
- Image range - saves a range of images that you specify in the text box to the right.

**Print options** - select from the following options:

- Print highlights - check this box to include in the PDF any highlights that you added to the images in the document.
- Print redactions - check this box to include in the PDF any redactions you applied to the images in the document. If you check this box, select one of the following redaction display options:
  - Normal - saves the PDF with the redactions displayed normally, as you applied them to the images in the document.
  - Transparent - saves the PDF with semi-transparent redactions. Note that with this option, the reader of the PDF can see both the text under the redaction and a trace of the redaction itself.
Note: Transparent redactions are useful when an attorney needs to access a hard copy (because they are unable to log in to a Relativity environment) of a document in order to approve the redactions that someone else applied to that document. In this case, the attorney needs a printed copy of the document that clearly displays both the redacted text and the fact that the text was redacted. Transparent redactions are also relevant when a judge needs to decide if one side of the litigation covered up too much a piece of evidence (the document).

- **Print slip sheet** - includes a slip sheet between the images in the document. If you check this box, you must select one of the following from the drop-down to the right:
  - *(Blank Page)* - includes a blank page slip sheet.
  - *(Identifier Only)* - includes a page with the document identifier stamped on it.
  - `<Document layouts>` - includes a slip sheet with the fields from any document coding layout. The values for the document are shown for those fields.

- **Stamp identifier** - select whether you’d like to print any identifier value on the images in the PDF. You have the following options:
  - *None* - doesn't include any identifier.
  - *Document Identifier* - includes the images' document identifiers.
  - *Image Number* - includes the images' page identifiers.

- **Stamp location** - select the location on each image in which you’d like either the Document Identifier or the Image Number stamp to appear. This is not available if you selected None for the Stamp identifier setting. Select from the following locations:
  - Top Left
  - Top Center
  - Top Right
  - Bottom Left
  - Bottom Center
  - Bottom Right

### 12.4 Extracted text mode

When you switch to **Extracted Text** or **Long Text** mode, the viewer toolbar displays a drop-down menu of extracted text and all long-text fields made available in the viewer on the field edit/creation page. See Creating fields in the Admin guide. The drop-down menu lists long-text fields that contain text for the current document open in the viewer and those you have permissions to.

Extracted text mode provides the following options:

Note: Relativity automatically hides toolbar buttons and controls that aren’t applicable to the currently loaded document type so that your toolbar isn’t cluttered while you’re reviewing documents.
- **Show/Hide Persistent Highlight Pane** - displays or hides a panel containing all persistent highlight sets in the workspace. In Extracted text mode, this pane shows the persistent highlight term count per page of an open document. Navigate between pages using the viewer paging control in order to view the persistent highlight term count for other pages of a document. See [Viewer paging on page 88](#).

- **Zoom Out/In** - zooms out and in on the current document in increments of 10% within a range of 10% to 500%. If you attempt to zoom out to a percentage lower than 10%, the viewer automatically sets the display to 10%. If you attempt to zoom in to a percentage higher than 500%, the viewer automatically sets the display to 500%. Your zoom setting persists as you navigate through a document set. This means that if you've set one document to 150% and you go to the next document, the next document defaults to 150% zoom.

To specify a zoom percentage without using the zoom out/in toolbar buttons, type the number in the percentage field and press the Enter key.

- **Reset zoom** - resets the zoom function to 100 percent.

- **Find previous and next** - searches for terms on the current page of an open document and navigates through the hits on the page.
  - Entering a term and either clicking the left or right arrow button or pressing Enter in this text box scrolls to and highlights the text of the next instance of the term (from the placement of the cursor).
  - Search hits return for the current page open in Extracted text mode. Navigate between pages using the viewer paging control in order to search for terms on other pages of a document. See [Viewer paging on page 88](#).
  - Searching in this text box is not case sensitive
  - Search results match partially-entered words.
  - Matching is done on the literal character typed into the search-box, including non-alphanumeric characters. This means that the viewer doesn't treat non-alphanumeric characters as wildcards.

- **Fit Width** - fits the document to the window. This function is only available in the preview mode.

- **Go To Next/Previous Highlight** - navigates to the previous and next persistent highlight terms on the current page of an open document. Navigate between pages using the viewer paging control in order to view persistent highlight terms found on other pages of a document. See [Viewer paging on page 88](#).

**Note:** If you don't have permission to the Local Access option on the Document object, you can't use the Ctrl+C or Ctrl+Ins options in either Viewer or Extracted Text mode.
12.5 Productions mode

When you switch to **Productions** mode, the viewer toolbar displays a drop-down menu of available production sets that contain the document currently open in the viewer. For information about creating production sets, see Production sets in the Admin guide.

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

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

Productions mode provides the following options:

**Note:** Relativity automatically hides toolbar buttons and controls that aren't applicable to the currently loaded document type so that your toolbar isn't cluttered while you're reviewing documents.

- **Show/Hide Thumbnails** - displays or hides a panel containing thumbnail images for pages of a document open in the viewer.
- **Zoom Out/In** - zooms out and in on the current document in increments of 10% within a range of 10% to 500%. If you attempt to zoom out to a percentage lower than 10%, the viewer automatically sets the display to 10%. If you attempt to zoom in to a percentage higher than 500%, the viewer automatically sets the display to 500%. Your zoom setting persists as you navigate through a document set. This means that if you've set one document to 150% and you go to the next document, the next document defaults to 150% zoom.

To specify a zoom percentage without using the zoom out/in toolbar buttons, type the number in the percentage field and press the Enter key.

- **Reset zoom** - resets the zoom function to 100 percent.
- **Fit Actual** - fits the document display to the actual size it was in its native application. By default, this resets the zoom percentage to 100%.
- **Fit Width** - increases the size of the document to fit the maximum width of the viewer. This setting persists when you re-size the window.
- **Fit Page** - fits the entire document into the total size of the page. Clicking this zooms out the document and reduces the font size.

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

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

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

- **Save as PDF** - gives you the option of saving the image as a PDF. For more information, see Saving an image as a PDF on page 78.

- **About** - displays the version of the production viewer. The icon is red if a version is out of date.

### 12.6 Imaging on the fly

You can image a single document on the fly using the **Image** button in the viewer.

**Note:** The Image button is disabled if the Processing application isn't installed.

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

![Image button](image-button.png)

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

After imaging a document on the fly, you can access thumbnail renderings of the imaged pages of the document. See Adding information to CaseMap on page 89.

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

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

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

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

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

**Note:** The default priority for all image-on-the-fly jobs is determined by the current value of the `ImageOnTheFlyJobPriorityDefault` entry in the configuration table. See the Configuration Table Guide for more information.

### 12.6.1 Image-on-the-fly process

The following graphic and accompanying steps depict what happens behind the scenes when you run an imaging job. These apply to imaging sets, mass imaging operations, and image-on-the-fly requests.

This is for reference purposes only.

(Click to expand)

1. The client’s browser sends image requests via HTTP POST to the conversion API hosted in the Imaging application on the Relativity web server.
2. The conversion API communicates with the SQL server to prepare the image requests.
3. The conversion API sends the prepared image requests in batches of 1,000 via the TCP-WCF service endpoint to Invariant. The number of requests per batch is configurable.
4. Invariant retrieves the documents from the file server via a standard field I/O stream.
5. Invariant writes the images contained in the request to a temporary location on the file server.
6. Invariant sends a notification of the image request completion to the conversion API via HTTP-WebAPI endpoint. Completion notifications are sent for every document.
7. The conversion API updates the Relativity data stored in the SQL server so that Relativity communicates the image progress/completion to the user.
8. The client’s browser periodically polls the conversion API for updates throughout the imaging process.
9. The conversion API writes files to a permanent destination directory in the file server.

12.7 Stand-alone document viewer

To view the document in a separate browser window, click the stand-alone document viewer icon in the upper right of the core reviewer interface. This opens another viewer pane with an Unsynced designation at the top of the screen. This means that the stand-alone viewer isn’t yet set to synchronize with the core reviewer interface.

To synchronize the standalone viewer with the core viewer, click Unsynced. This switches the stand-alone viewer setting to Synced where you can view text and images, natives, and productions side-by-side while navigating through the document queue.

Note: Keyboard shortcuts are available for use in the stand-alone viewer. For example, if you execute the shortcut for Save & Next in the stand-alone viewer, each window performs the operation and moves to the next document.

12.8 Related items pane

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

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

RAR Overturn Analysis - displays overturned documents, seed documents, and seed excerpts. For more information about this functionality, see Reports in the Assisted Review Guide.

Document history - displays a history of actions taken on the current document. You may not have access to document history.

Note: In the document history pane, you can click the Details link to display a pop-up with the audit history for the document. Click Run Details to display information about document imaging jobs, including the name of the imaging profile and the formatting options used during mass imaging or imaging on the fly.

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

Linked - displays all linked records on the active document. For more information on linking documents, see Links on page 69.

Search results - displays the results of a Relativity Analytics search. See Searching overview on page 57.

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

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

For instance, in the example of the related items pane below, the active document is highlighted and listed with two related family documents. You can select some or all of the documents in the related items pane and click Go. This opens a window for you to access all of your active layouts – the same layouts available in the layouts pane. Using these layouts, you can make coding decisions and apply them to the selected documents using mass editing. See Mass edit in the Admin guide.
12.9 Thumbnail viewer

When in Image or Productions mode, you can access and browse thumbnail renderings of a document’s pages. Quickly scan, locate, and navigate to pages in an open document.

Any highlights or redactions you apply to images won’t appear in the thumbnail viewer images. See Markups on page 25.

To open the thumbnail viewer when in Image or Productions mode, click the **Show/Hide Thumbnails** button on the viewer toolbar. The thumbnail viewer opens on the left side of the screen. Scroll up and down to navigate all pages in the open document and click a page to view it.

**Note:** To access to the thumbnail viewer, you must have the Admin Operation permission View Image Thumbnails. If you don’t have this permission, contact your administrator.
The number of thumbnail images in a set is determined by the size of your browser window. Resize your browser window to view a different number of thumbnails per set.

**12.10 Viewer paging**

When a document opens with multiple pages in the viewer, use the paging control to navigate to the previous or next page or to the first or last page in the document.
The paging control loads if a document opens with multiple pages in the following modes:

- Viewer
- Image
- Extracted text
- Productions

**Note:** The number of pages that load in Extracted text mode doesn't represent the number of pages in the original document. The TextViewerMaxPageSize and TextViewerPageBufferSize configuration table values control the amount of text that loads per page in Extracted text mode. See TextViewerMaxPageSize and TextViewerPageBufferSize in the Configuration Table Guide.

### 12.11 Adding information to CaseMap

You can capture documents and text in the Relativity viewer for analysis in the CaseMap tool. You can then use a mass operation to export the data to CaseMap. See Send to CaseMap in the Admin guide for details.
Note: CaseMap is not compatible with Windows 8.

12.11.1 Adding a document to CaseMap

To add a document to a CaseMap database from the viewer, right click the document and select Case Map > Add to CaseMap.

12.11.1.1 Linking a document to CaseMap

Next, you must link the document to CaseMap:

1. Choose the CaseMap category for the document (Document, Pleading, Proceeding, Research Authority, or Other).
2. Enter a Full Name for the new document you’re linking to CaseMap.
3. Enter a Short Name for the document you’re linking.
4. (Optional) Click Advanced to Save or Save & Edit the document linking information you’ve already entered.
5. Click OK.

12.11.2 Adding a fact to CaseMap

In addition to adding a document to CaseMap, you can add a highlighted text excerpt from a document as a fact:

1. After highlighting the text in the viewer, right click and select Case Map > Add Fact.

This action results in the download of a .cmbulk file. Your browser may prompt you with the options to open or save the downloaded .cmbulk file.

2. Open the .cmbulk file download from your browser to launch the Bulk 'Send to CaseMap' Wizard.
3. Click Next on the Welcome to the Bulk 'Send to CaseMap' Wizard dialog.

   Note: If you edited your field mappings in a previous Add Fact operation, the Welcome dialog presents you with an option to view or edit your existing field mappings. To view and edit your field mappings, select Yes. To skip the field mapping step, select No.

4. Click Modify on the View/Edit Field Mappings dialog and map the source data fields to your CaseMap fields. If you previously edited your field mappings and selected No on the Welcome dialog, proceed to step 7.
5. Click **Next** on the View/Edit Field Mappings dialog after mapping your fields.
6. Click **Next** to confirm the destination CaseMap case.
7. Click **Finish** to send the fact text to CaseMap.
8. Click **OK** to confirm the number of records sent to CaseMap from Relativity.

When you view your case in CaseMap, you should see the new fact has been added.

### 12.12 Relativity Compare

You can use Relativity Compare to view the key differences between the extracted text of two documents. To access the Relativity Compare system field, you must first add it to a view. See Views in the Admin guide. If you compare documents from within the related items pane,
To compare two documents in Relativity:

1. Click to open the Document Compare selection window.
2. By default the document identifier of the selected document populates the Document Compare window. Click by the With field to select a document with which to compare it. A Select Item pop-up window displays.

   **Note:** You can change the value of either of the fields at any time while in the Document Compare window.

3. Select the desired document from the list and click **Set**. The Document Compare window displays the selected document in the With field.
4. Click **Compare**. The window displays the similarities and differences between the documents.
5. The similarities and differences between the documents are reflected in the legend at the bottom of the window:
   - **Inserted** - Text appears in the "With" document but doesn't appear in the "Compare" document.
   - **Deleted** - Text appears in the "Compare" document but doesn't appear in the "With" document.
Unchanged - Text appears in both documents.

You can also compare related documents from within the viewer. To compare related documents in the viewer, open the Related Items pane and click next to the document you want to compare. The Document Compare selection window opens. The document you select from the Related Items pane automatically populates in the With field, while the document open in the viewer automatically populates the Compare field.

12.13 Viewer-supported file types

Relativity uses Oracle Outside In to display rendered versions of native files within the legacy ActiveX viewer. Reviewers can see how the file looked in its native application without opening the file in that native application.

This document provides a comprehensive list of files types supported by the viewer, according to Oracle. This list applies to version 8.5.0.

See the Admin guide for more information on the viewer.

12.13.1 Text only designation

Some file types have a "text only" designation. When viewing these files in the viewer mode of the Relativity viewer, the document's text is the only data that renders. For Microsoft Project files and
XML files, the view doesn't display items such as Gantt charts, icons, or other graphics. There is typically no formatting (bold, italics, fonts, etc.) of the text.

12.13.2 File ID only designation

Some file types have a "file ID only" designation. The viewer is able to identify the file ID correctly, but it returns an error message indicating that the file format is not supported. Despite returning an error message, the viewer identifies the file so that you can easily locate it and open it in an alternate application.

12.13.3 File identification values in Outside In 8.5.0

Before referring to the list of file types supported in Outside In 8.5.0, you may want to note the following changes in file identification values from version 8.4.0 to version 8.5.0.

12.13.3.1 File identification values added in 8.5.0

The following file identification values were added in Outside In 8.5.0.

<table>
<thead>
<tr>
<th>File ID</th>
<th>Name</th>
<th>Super Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1498</td>
<td>Apache Office 3.x Calc (ODF 1.2)</td>
<td>Spreadsheet</td>
</tr>
<tr>
<td>2258</td>
<td>Apache Office 3.x Draw (ODF 1.2)</td>
<td>Presentation</td>
</tr>
<tr>
<td>2257</td>
<td>Apache Office 3.x Impress (ODF 1.2)</td>
<td>Presentation</td>
</tr>
<tr>
<td>1382</td>
<td>Apache Office 3.x Writer (ODF 1.2)</td>
<td>Word processor</td>
</tr>
<tr>
<td>1499</td>
<td>Apache Office 4.x Calc (ODF 1.2)</td>
<td>Spreadsheet</td>
</tr>
<tr>
<td>2260</td>
<td>Apache Office 4.x Draw (ODF 1.2)</td>
<td>Presentation</td>
</tr>
<tr>
<td>2259</td>
<td>Apache Office 4.x Impress (ODF 1.2)</td>
<td>Presentation</td>
</tr>
<tr>
<td>1383</td>
<td>Apache Office 4.x Writer (ODF 1.2)</td>
<td>Word processor</td>
</tr>
<tr>
<td>2231</td>
<td>Apple iWork Keynote File</td>
<td>Word processor</td>
</tr>
<tr>
<td>2232</td>
<td>Apple iWork Keynote File Preview</td>
<td>Vector</td>
</tr>
<tr>
<td>1485</td>
<td>Apple iWork Numbers File</td>
<td>Spreadsheet</td>
</tr>
<tr>
<td>1486</td>
<td>Apple iWork Numbers File Preview</td>
<td>Vector</td>
</tr>
<tr>
<td>1367</td>
<td>Apple iWork Pages File</td>
<td>Word processor</td>
</tr>
<tr>
<td>1368</td>
<td>Apple iWork Pages File Preview</td>
<td>Vector</td>
</tr>
<tr>
<td>2245</td>
<td>AutoCAD 2013 Drawing</td>
<td>Vector</td>
</tr>
<tr>
<td>2244</td>
<td>Corel Presentations X6</td>
<td>Presentation</td>
</tr>
<tr>
<td>2036</td>
<td>Flexiondoc v5.7 (XML)</td>
<td>Word processor</td>
</tr>
<tr>
<td>2246</td>
<td>Harvard Graphics 98</td>
<td>Vector</td>
</tr>
<tr>
<td>1496</td>
<td>Libre Office 3.x Calc (ODF 1.2)</td>
<td>Spreadsheet</td>
</tr>
<tr>
<td>2254</td>
<td>Libre Office 3.x Draw (ODF 1.2)</td>
<td>Presentation</td>
</tr>
<tr>
<td>2253</td>
<td>Libre Office 3.x Impress (ODF 1.2)</td>
<td>Presentation</td>
</tr>
<tr>
<td>1379</td>
<td>Libre Office 3.x Writer (ODF 1.2)</td>
<td>Word processor</td>
</tr>
<tr>
<td>2256</td>
<td>Libre Office 4.x Draw (ODF 1.2)</td>
<td>Presentation</td>
</tr>
<tr>
<td>2255</td>
<td>Libre Office 4.x Impress (ODF 1.2)</td>
<td>Presentation</td>
</tr>
</tbody>
</table>
### 12.13.4 File types supported in Oracle 8.5.0

The viewer supports the following native file types. The supported file types are listed by category.

<table>
<thead>
<tr>
<th>Program/File Type</th>
<th>Category</th>
<th>Type/Version</th>
<th>File Extension</th>
</tr>
</thead>
<tbody>
<tr>
<td>7z</td>
<td>Archive</td>
<td></td>
<td>.7z</td>
</tr>
<tr>
<td><strong>Note:</strong> BZIP2 and split archives are not supported.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apache Office Calc (ODF 1.2)</td>
<td>Spreadsheet</td>
<td>3.x, 4.x</td>
<td></td>
</tr>
<tr>
<td>Apache Office Draw (ODF 1.2)</td>
<td>Presentation</td>
<td>3.x, 4.x</td>
<td></td>
</tr>
<tr>
<td>Apache Office Impress (ODF 1.2)</td>
<td>Presentation</td>
<td>3.x, 4.x</td>
<td></td>
</tr>
<tr>
<td>Apache Office Writer (ODF 1.2)</td>
<td>Word processor</td>
<td>3.x, 4.x</td>
<td></td>
</tr>
<tr>
<td>Apple iWork Keynote File</td>
<td>Word processor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apple iWork Keynote File Preview</td>
<td>Vector</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apple iWork Keynote Numbers File</td>
<td>Spreadsheet</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apple iWork Keynote Numbers File Preview</td>
<td>Vector</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apple iWork Pages File</td>
<td>Word processor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apple iWork Pages File Preview</td>
<td>Vector</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AutoCAD Drawing</td>
<td>Vector</td>
<td>2013</td>
<td>.dwg</td>
</tr>
<tr>
<td>Corel Presentations</td>
<td>Presentation</td>
<td>X6</td>
<td>.shw</td>
</tr>
<tr>
<td>Flexiondoc (XML)</td>
<td>Word processor</td>
<td>v5.7</td>
<td>.xml</td>
</tr>
<tr>
<td>Harvard Graphics</td>
<td>Vector</td>
<td>98</td>
<td>.cht</td>
</tr>
<tr>
<td>Libre Office Calc (ODF 1.2)</td>
<td>Spreadsheet</td>
<td>3.x, 4.x</td>
<td></td>
</tr>
<tr>
<td>Program/File Type</td>
<td>Category</td>
<td>Type/Version</td>
<td>File Extension</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>------------------</td>
<td>-----------------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Libre Office Draw (ODF 1.2)</td>
<td>Presentation</td>
<td>3.x, 4.x</td>
<td></td>
</tr>
<tr>
<td>Libre Office Impress (ODF 1.2)</td>
<td>Presentation</td>
<td>3.x, 4.x</td>
<td></td>
</tr>
<tr>
<td>Libre Office Writer (ODF 1.2)</td>
<td>Word processor</td>
<td>3.x, 4.x</td>
<td></td>
</tr>
<tr>
<td>Microsoft Access</td>
<td>Database</td>
<td>2007/2010</td>
<td>.accdb</td>
</tr>
<tr>
<td>Microsoft OneNote File</td>
<td>Word processor</td>
<td></td>
<td>.one</td>
</tr>
<tr>
<td>Office Calc (ODF 1.2)</td>
<td>Spreadsheet</td>
<td>4.x</td>
<td></td>
</tr>
<tr>
<td>PKZip</td>
<td>Archive</td>
<td></td>
<td>.zip</td>
</tr>
<tr>
<td>Quattro Pro Win</td>
<td>Spreadsheet</td>
<td>X6</td>
<td>.qpw</td>
</tr>
<tr>
<td>7z Self Extracting exe</td>
<td>Archive</td>
<td></td>
<td>.exe</td>
</tr>
<tr>
<td><strong>Note:</strong> BZIP2 and split archives are not supported.</td>
<td></td>
<td></td>
<td></td>
</tr>
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<td>LZA Self Extracting Compress</td>
<td>Archive</td>
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<td>.lza</td>
</tr>
<tr>
<td>LZH Compress</td>
<td>Archive</td>
<td></td>
<td>.lzh</td>
</tr>
<tr>
<td>Microsoft Office Binder</td>
<td>Archive</td>
<td>95, 97</td>
<td>.obd</td>
</tr>
<tr>
<td>Microsoft Cabinet (CAB)</td>
<td>Archive</td>
<td></td>
<td>.cab</td>
</tr>
<tr>
<td>RAR</td>
<td>Archive</td>
<td>1.5, 2.0, 2.9</td>
<td>.rar</td>
</tr>
<tr>
<td>Self-extracting .exe</td>
<td>Archive</td>
<td></td>
<td>.exe</td>
</tr>
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<td>UNIX Compress</td>
<td>Archive</td>
<td></td>
<td>.z</td>
</tr>
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<td>UNIX GZip</td>
<td>Archive</td>
<td></td>
<td>.gz</td>
</tr>
<tr>
<td>UNIX tar</td>
<td>Archive</td>
<td></td>
<td>.tar</td>
</tr>
<tr>
<td>Uuencode</td>
<td>Archive</td>
<td>PKZip, WinZip</td>
<td>.zip</td>
</tr>
<tr>
<td>Zip</td>
<td>Archive</td>
<td>PKZip, WinZip</td>
<td>.zip</td>
</tr>
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<td>DataEase</td>
<td>Database</td>
<td>4.x</td>
<td>.dba</td>
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<td>DBase</td>
<td>Database</td>
<td>III, IV, V</td>
<td>.dbf</td>
</tr>
<tr>
<td>First Choice DB</td>
<td>Database</td>
<td>Through 3.0</td>
<td>.fol</td>
</tr>
<tr>
<td>Framework DB</td>
<td>Database</td>
<td>3.0</td>
<td></td>
</tr>
<tr>
<td>Microsoft Access (text only)</td>
<td>Database</td>
<td>1.0, 2.0, 95 - 2010</td>
<td>.accdb, .mdb</td>
</tr>
<tr>
<td>Microsoft Works DB for DOS</td>
<td>Database</td>
<td>2.0</td>
<td>.wdb</td>
</tr>
<tr>
<td>Microsoft Works DB for Macintosh</td>
<td>Database</td>
<td>2.0</td>
<td>.wdb</td>
</tr>
<tr>
<td>Microsoft Works DB for Windows</td>
<td>Database</td>
<td>3.0, 4.0</td>
<td>.wdb</td>
</tr>
<tr>
<td>Microsoft Works DB for DOS</td>
<td>Database</td>
<td>1.0</td>
<td>.wdb</td>
</tr>
<tr>
<td>Paradox for DOS</td>
<td>Database</td>
<td>2.0 - 4.0</td>
<td>.db</td>
</tr>
<tr>
<td>Paradox for Windows</td>
<td>Database</td>
<td>1.0</td>
<td>.db</td>
</tr>
<tr>
<td>Q&amp;A Database</td>
<td>Database</td>
<td>Through 2.0</td>
<td>.db</td>
</tr>
<tr>
<td>R:Base</td>
<td>Database</td>
<td>R:Base 5000, R:Base System V</td>
<td>.rb1, .rb2, .rb3</td>
</tr>
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<td>Reflex</td>
<td>Database</td>
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<td>.rdx</td>
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<td>SmartWare II DB</td>
<td>Database</td>
<td>1.02</td>
<td>.db</td>
</tr>
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<td>Apple Mail Message (EMLX)</td>
<td>Email</td>
<td>2.0</td>
<td>.emlx</td>
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<tr>
<td>Program/File Type</td>
<td>Category</td>
<td>Type/Version</td>
<td>File Extension</td>
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<td>----------------------------------------------------------------------------------</td>
<td>-----------</td>
<td>------------------------------------------------------------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Encoded mail messages</td>
<td>Email</td>
<td>MHT, Multi Part Alternative, Multi Part Digest, Multi Part Mixed, Multi Part News Group, Multi Part Signed, TNEF</td>
<td></td>
</tr>
<tr>
<td>EML with Digital Signature</td>
<td>Email</td>
<td>SMIME</td>
<td>.eml</td>
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<tr>
<td>IBM Lotus Notes Domino XML Language DXL</td>
<td>Email</td>
<td>8.5</td>
<td>.xml</td>
</tr>
<tr>
<td>IBM Lotus Notes NSF (Win32, Win64, Linux x86-32 and Oracle Solaris 32-bit only with Notes Client or Domino Server)</td>
<td>Email</td>
<td>8.x</td>
<td>.nsf</td>
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<td>MBOX Mailbox</td>
<td>Email</td>
<td>RFC 822</td>
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<td>Microsoft Outlook (MSG)</td>
<td>Email</td>
<td>97 - 2013</td>
<td>.msg</td>
</tr>
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<td>Microsoft Outlook (OST )</td>
<td>Email</td>
<td>97 - 2010, 2013</td>
<td>.ost</td>
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<tr>
<td>Microsoft Outlook (PST )</td>
<td>Email</td>
<td>97 - 2013</td>
<td>.pst</td>
</tr>
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<td>Microsoft Outlook Express (EML)</td>
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<td>.eml</td>
</tr>
<tr>
<td>Microsoft Outlook Forms Template (OFT)</td>
<td>Email</td>
<td>97 - 2010</td>
<td>.oft</td>
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<tr>
<td>Microsoft Outlook PST (Mac)</td>
<td>Email</td>
<td>2001</td>
<td>.pst</td>
</tr>
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<td>MSG with Digital Signature</td>
<td>Email</td>
<td>SMIME</td>
<td>.msg</td>
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<tr>
<td>AVI (Metadata only)</td>
<td>Multimedia</td>
<td></td>
<td>.avi</td>
</tr>
<tr>
<td>Flash (text extraction only)</td>
<td>Multimedia</td>
<td>6.x, 7.x, Lite</td>
<td>.swf</td>
</tr>
<tr>
<td>MP3 (ID3 metadata only)</td>
<td>Multimedia</td>
<td></td>
<td>.mp3</td>
</tr>
<tr>
<td>MPEG – 1 Audio layer 3 V ID3 v1 (Metadata only)</td>
<td>Multimedia</td>
<td></td>
<td>.mpg</td>
</tr>
<tr>
<td>MPEG – 1 Audio layer 3 V ID3 v2 (Metadata only)</td>
<td>Multimedia</td>
<td></td>
<td>.mpg</td>
</tr>
<tr>
<td>MPEG – 4 (Metadata only)</td>
<td>Multimedia</td>
<td></td>
<td>.mpg</td>
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<tr>
<td>MPEG – 7 (Metadata only)</td>
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<td>Multimedia</td>
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<td>WAV (Metadata only)</td>
<td>Multimedia</td>
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<td>Windows Media ASF (Metadata only)</td>
<td>Multimedia</td>
<td></td>
<td>.asf</td>
</tr>
<tr>
<td>Windows Media Audio WMA (Metadata only)</td>
<td>Multimedia</td>
<td></td>
<td>.wma</td>
</tr>
<tr>
<td>Windows Media DVR-MS (Metadata only)</td>
<td>Multimedia</td>
<td></td>
<td>.dvr-ms</td>
</tr>
<tr>
<td>Program/File Type</td>
<td>Category</td>
<td>Type/Version</td>
<td>File Extension</td>
</tr>
<tr>
<td>-------------------</td>
<td>----------</td>
<td>--------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Windows Media Video WMV (Metadata only)</td>
<td>Multimedia</td>
<td></td>
<td>.wmv</td>
</tr>
<tr>
<td>Microsoft Live Messenger (via XML filter)</td>
<td>Other</td>
<td>10.0</td>
<td></td>
</tr>
<tr>
<td>Microsoft OneNote (text only)</td>
<td>Other</td>
<td>2007, 2010, 2013</td>
<td>.one</td>
</tr>
<tr>
<td>Microsoft Project (sheet view only, Gantt Chart, Network Diagram, and graph not supported)</td>
<td>Other</td>
<td>98-2003</td>
<td>.mpp</td>
</tr>
<tr>
<td>Microsoft Project (sheet view only, Gantt Chart, Network Diagram, and graph not supported)</td>
<td>Other</td>
<td>2007, 2010</td>
<td>.mpp</td>
</tr>
<tr>
<td>Microsoft Windows DLL</td>
<td>Other</td>
<td></td>
<td>.dll</td>
</tr>
<tr>
<td>Microsoft Windows Executable</td>
<td>Other</td>
<td></td>
<td>.dll</td>
</tr>
<tr>
<td>Trillian Text Log File (via text filter)</td>
<td>Other</td>
<td>4.2</td>
<td>.txt</td>
</tr>
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<td>vCalendar</td>
<td>Other</td>
<td>2.1</td>
<td>.vcs</td>
</tr>
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<td>vCard</td>
<td>Other</td>
<td>2.1</td>
<td>.vcf</td>
</tr>
<tr>
<td>Yahoo! Messenger</td>
<td>Other</td>
<td>6.x–8</td>
<td>.yps</td>
</tr>
<tr>
<td>Apple iWork Keynote (MacOS, text and PDF preview)</td>
<td>Presentation</td>
<td>09</td>
<td>.key, .keynote</td>
</tr>
<tr>
<td>Harvard Graphics Presentation</td>
<td>Presentation</td>
<td>3.0</td>
<td>.prs</td>
</tr>
<tr>
<td>IBM Lotus Symphony Presentations</td>
<td>Presentation</td>
<td>1.x</td>
<td></td>
</tr>
<tr>
<td>Kingsoft WPS Presentation</td>
<td>Presentation</td>
<td>2010</td>
<td></td>
</tr>
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<td>Lotus Freelance</td>
<td>Presentation</td>
<td>1.0 - Millennium 9.8</td>
<td>.prz</td>
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<td>Lotus Freelance for OS/3</td>
<td>Presentation</td>
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<td>Lotus WordPro (text only)</td>
<td>Word processing</td>
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<td>Mass 11</td>
<td>Word processing</td>
<td>Through 8.0</td>
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<td>Word processing</td>
<td>2.0</td>
<td>.wps</td>
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<tr>
<td>Microsoft Works WP for Windows</td>
<td>Word processing</td>
<td>3.0, 4.0</td>
<td>.wps</td>
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<td>Microsoft Write for Windows</td>
<td>Word processing</td>
<td>1.0 – 3.0</td>
<td>.wri</td>
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<td>MultiMate</td>
<td>Word processing</td>
<td>Through 4.0</td>
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<tr>
<td>MultiMate Advantage</td>
<td>Word processing</td>
<td>2.0</td>
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<td></td>
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<tr>
<td>Nota Bene</td>
<td>Word processing</td>
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<td>Novell PerfectWorks Word Proces-</td>
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<td>Word processing</td>
<td>4.0-6.0</td>
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<td>OpenOffice Writer</td>
<td>Word processing</td>
<td>1.1 - 3.0</td>
<td>.sdw</td>
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<td>Oracle Open Office Writer</td>
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<td>5.0</td>
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<td>Word processing</td>
<td>A, B</td>
<td>.pfs</td>
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<td>Professional Write for DOS</td>
<td>Word processing</td>
<td>1.0, 2.0</td>
<td></td>
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<tr>
<td>Professional Write Plus for Win-</td>
<td>Word processing</td>
<td>1.0</td>
<td></td>
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<td>dows</td>
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<td>.jw</td>
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<td>Samna Word IV</td>
<td>Word processing</td>
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<tr>
<td>Samna Word IV+</td>
<td>Word processing</td>
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<td>Signature</td>
<td>Word processing</td>
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<td>1.0</td>
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<td>StarOffice Writer</td>
<td>Word processing</td>
<td>5.2 – 9.0</td>
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<td>Total Word</td>
<td>Word processing</td>
<td>1.2</td>
<td></td>
</tr>
<tr>
<td>Wang IWP</td>
<td>Word processing</td>
<td>Through 2.6</td>
<td>.iwp</td>
</tr>
<tr>
<td>WordMarc Composer</td>
<td>Word processing</td>
<td></td>
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</tr>
</tbody>
</table>
### 13 Workspaces

In Relativity, a workspace provides a secure data repository for documents used in cases or for applications developed with Dynamic Objects. You can store all types of documents (such as productions, witness testimony, and so on) in a workspace to facilitate searching, organizing, and categorizing content. In addition, you can use granular security settings to grant or deny permissions to specific content stored in the workspace.

At the workspace level, you can also define views, layouts, fields, and choices. These Relativity features streamline workflows, as well as simplify the processes for organizing and categorizing content. Views support filtering on item lists, while layouts, fields, and choices are used for categorizing documents.

View the 9.0 object relationships

In Relativity 9.0, workspaces are associated with matters, groups, custom objects and the document object.

View the 9.1 object relationships.

In Relativity 9.1, workspaces are associated with clients, matters, groups, custom objects, and the document object.

---

<table>
<thead>
<tr>
<th>Program/File Type</th>
<th>Category</th>
<th>Type/Version</th>
<th>File Extension</th>
</tr>
</thead>
<tbody>
<tr>
<td>WordMarc Composer+</td>
<td>Word processing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>WordMarc Word Processor</td>
<td>Word processing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>WordPerfect for DOS</td>
<td>Word processing</td>
<td>4.2</td>
<td>.wpd</td>
</tr>
<tr>
<td>WordPerfect for Macintosh</td>
<td>Word processing</td>
<td>1.02 - 3.1</td>
<td>.wpd</td>
</tr>
<tr>
<td>WordPerfect for Windows</td>
<td>Word processing</td>
<td>5.1 – X5</td>
<td>.wpd</td>
</tr>
<tr>
<td>Wordstar 2000 for DOS</td>
<td>Word processing</td>
<td>1.0 - 3.0</td>
<td>.wsd</td>
</tr>
<tr>
<td>Wordstar for DOS</td>
<td>Word processing</td>
<td>3.0 - 7.0</td>
<td>(none defined)</td>
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<tr>
<td>Wordstar for Windows</td>
<td>Word processing</td>
<td>1.0</td>
<td>.ws1</td>
</tr>
<tr>
<td>XyWrite</td>
<td>Word processing</td>
<td>Through III+</td>
<td>.xy</td>
</tr>
</tbody>
</table>
13.1 Workspace admin group

A system admin can assign any group in Relativity to have full admin rights over a particular workspace. A workspace admin group has full control over all objects within the workspace, but members of the group do not have the script permissions available only to system admins and can’t alter the permission settings of users within the workspace. Workspace admins can be permitted to edit group permissions in Relativity 9.1.

Use the following steps to set a designate a workspace admin group:

1. Click **Edit** on the **Workspace Details** tab.
2. Click ![Workspace Admin](image) in the **Workspace Admin** field.
3. Click the radio button next to the group you want to set as the workspace admin group.
4. Click **Ok**.

**Note:** You can only designate one group per workspace as a workspace admin group.

**Note:** Migrating a workspace that contains published data to a resource pool associated with a different worker manager server results in the loss of all references to previously published data.

1. Select the client with tenancy enabled from the list.

13.2 Workspace navigation

The workspace has several key areas that are important to understand as a Relativity user.
13.2.1 Browser

The browser is located on the left side of the workspace. Depending on your permissions, you may not see the browser. If you don't have a browser in your workspace, you can skip this section.

If you can see the browser, it contains at least three of the following options for browsing through your documents:

- Folders
- Field Tree
- Saved Searches
- Clusters

No matter which of these options you use, there are several display options you can use to customize your workspace.

The browser opens by default. Hide or show the browser by using the arrow icon the upper left of the browser. Clicking » closes the browser and expands the item list manager to the full width of the Relativity window. Reopen the document browser by clicking «.

You can also resize the document browser. Use the browser resize handle—the gray bar separating the document browser from the folder browser—to resize the browser to suit your preference.

13.2.1.1 Browser options

The browser menu is located directly below the browser. Click on one of the menu’s options to display that mode of the browser:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Folder browser</td>
<td>Navigate the folder hierarchy for your workspace</td>
</tr>
<tr>
<td>📁</td>
<td>Field Tree browser</td>
<td>Browse your documents according to how they were coded or grouped</td>
</tr>
<tr>
<td>Icon</td>
<td>Name</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>-----------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>🝃</td>
<td>Saved Searches browser</td>
<td>Create a new search, or browse previously saved searches</td>
</tr>
<tr>
<td>🝃</td>
<td>Clusters browser</td>
<td>Browse your workspace clusters, which are groupings of conceptually correlated documents. You must have Relativity Analytics to use the cluster browser and define clusters in your workspace. See the Analytics Guide.</td>
</tr>
</tbody>
</table>

**Folder browser**

Clicking on the folder icon allows you to navigate the folder hierarchy for your workspace. The folder structure is set when documents are imported. It can be based on the document’s source, or according to a folder structure set by your Relativity administrator. Clicking on a folder displays that folder’s documents in the item list.

A folder often has multiple subfolders. You can view the subfolders with the expand (+) button to the left of the desired folder. Once the subfolders expand, you can use the collapse (-) button to collapse them back into their root folder.

**Field tree browser**

Clicking on the field tree icon displays the field tree in the browser. Selected single- and multiple-choice list fields and their choices appear in a tree structure.
Each single and multiple-choice field has its own choice folder in the field tree. The field's choices appear as subfolders. Each field also has a [Not Set] choice, which displays null values for the field.

You can click on a choice in the field tree to display all the documents in the item list manager that have the selected choice value AND meet the criteria of the active view. In the item list, click this icon to send a link to the documents currently displayed in it.

**Sending email links to choices**

You can send an email message with a link to a choice, a choice folder, or the item list that appears when the field tree browser is open. In the field tree browser, right-click on a choice (or a choice folder) to display the E-mail Link option. Click this option on a choice to open an email message containing a link to it. You can also send a link by clicking this icon in the item list.
The subject line of the email message pre-populates with the following text: "Relativity Review - <Workspace Name> - <Choice Name: Value>." When the recipient clicks on the link, the documents associated with the choice appear in the item list manager. Relativity displays a permissions denied message if the recipient clicks the link but doesn't have access rights on the field associated with the choice.

**Note:** If you send an email link to a choice folder, the subject line displays the folder name instead of the choice name and the value. The item list manager displays all documents associated with the choices in the folder. Recipients must have access rights to fields associated with the choice folder.

### 13.2.2 View bar

You can use the view bar, as well as any searches or filters, to narrow further the document set. The following illustration shows the view bar displayed on the Documents tab.

- **Show current path icon** - displays the current browser location. See [Icons below](#) below.
- **Views drop-down menu** - allows you to select a view.
- **Scope drop-down menu** - controls the folder scope of the documents returned. The scope menu contains the following options:
  - **In This Folder and Subfolders** - displays the documents in the currently selected folder AND the documents in all of its subfolders. This is the default option.
  - **In This Folder** - displays ONLY the documents in the currently selected folder in the browser, not its subfolders.
- **Include Related Documents drop-down menu** - returns documents related to the documents currently in the view. The options vary by workspace, but may include email family groups, duplicates, or similar documents.
- **Edit view icon** - allows you to edit the current view. See [Icons below](#) below.
- **Create view icon** - allows you to create a new view. See [Icons below](#) below.

For more information, see the Views chapter of the Admin guide.

#### 13.2.2.1 Icons

Once you use your browser selection and view bar to select the correct searching set of documents, you can begin working with them in the item list manager.
Show the current path. This allows you to copy your current browser location to the clipboard to paste into various locations. Clicking this icon displays the following:

Current browser location
Salt vs. Pepper

Add a new view. This will only be present if you have permission to add a new view. If it is not present, contact your Relativity administrator to add a view.

Edit the current view. This will only be present if you have permission to edit the view. If it’s not present, contact your Relativity administrator to edit the current view.

13.2.3 Item list

The item list manager consists of the item list as well as controls for working with the documents. The fields that appear in the item list are based on the selected view, which is editable.

Contact your Relativity administrator to change the fields in your view.

To change a column’s size, hover over the white line at the edge of the column header. A double arrow appears, indicating that you can move the column. Drag it in either direction to adjust the column width. The other columns on the page automatically adjust to fill the rest of the window. Column data can be cut off. If you wish to return to the original settings click the Reset Column Sizes icon.

13.2.3.1 Previewing a document

Note that if you hover your mouse pointer over a record’s file icon, you can click to open a pop-up viewer showing the record.

Note: If your item list doesn’t contain the file icon, contact your Relativity administrator to add it.

13.2.3.2 Sorting

You can use any field in the view to sort the entire searching set – the number of documents indicated in the bottom right.
Click any field heading once to sort the documents in that field in ascending order, alphabetically. A down arrow appears next to the heading name, as in the Reviewer field below. Click a second time to sort the documents in descending order, alphabetically. An up arrow appears. Clicking the field name a third time clears the sort and returns the field to its original order.

If you're not able to sort a particular field, contact your administrator to make sure the field has the Sort option set to Yes.

### 13.2.4 Document set information bar

The document set information bar appears in the bottom right corner of the workspace. It consists of the returned set selector and the displayed set selector. The document set information bar gives you further control over how you work with your searching set.

The returned set selector indicates the subset of your searching set that Relativity returns. Your returned set is controlled by the drop-down menu that appears in the above screenshot.

**Note:** The size of your returned set doesn't control which items you can search or on which items you can run a mass operation. Any search you run is based on the number of documents in your searching set.

You can run any mass operation on the number of checked items in the item list, the number of returned items, OR all the items in your searching set. See Mass operations in the Admin guide.

Depending on your environment, the default returned set size may be 500 or 1,000. If you’d like to change your environment’s results set selector defaults, contact your Relativity administrator.

Note that the number of documents in your result set selector is the number of documents you're able to browse in the core reviewer interface.

For instance, if your result set selector is set to 500 documents, you're able to browse the first 500 documents of your searchable set. You can't browse to document 501 in the viewer.

To do so, you can either:

- Add more documents
- Apply filters to return only the documents you want to browse

### 13.2.4.1 Adding more documents

Click the drop-down menu to add documents to the returned set. Depending on your environment, you may be able to add 500, 1,000, or 5,000 more documents to your returned set. If you want to change your environment’s results set selector defaults, contact your Relativity administrator.
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