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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 guides you through the ways in which it can best be used for document review, from logging in to creating a word index inside a workspace.

2 Relativity objects

Relativity is a flexible document-review platform customized by your Relativity administrator to provide an intuitive document review.

Each workspace consists of an interconnected set of objects.

Each Workspace contains many Documents. Document information is stored in Fields. Fields may have predetermined sets of values you can select, called Choices in Relativity.

You can view or interact with documents using Views and Layouts.

Views are read-only lists of documents and are displayed in the item list manager.
Layouts are editable, web-based coding forms that allow you to view and make changes to your documents’ fields.
3 Workspace

After logging into Relativity and selecting your workspace, you see the Documents tab. The workspace consists of the following:

- Tab Bar
- Browser
- View Bar
- Search and Pivot Options
- Item List

The Tab Strip allows you to navigate between the different sections of the application, such as documents, summary reports and productions. Clicking on a tab takes you to that section. Depending on your permissions within Relativity, you may see only the documents tab. If not all tabs can be displayed at once, click on one of the triangle shaped icons at the end of the tabs to move across the tab list.

The Browser, which may not be available to all users, provides you with the following different ways of navigating your case documents:

- Folders
- Field Tree
- Saved searches
- Clusters

You may see some or all of these options.

The View Bar controls which documents and fields are displayed in the item list manager.
The Item list Manager is the central location for viewing lists of workspace documents. The Item list Manager allows you to do the following:

- Navigate through workspace documents
- Search and filter workspace data
- Export workspace information to file
- Mass-act on workspace documents
- Sort documents on the list

### 3.1 Workspaces mode

Clicking on Workspaces in the mode bar, or logging in, brings you to a list of your workspaces.

If you don't see your workspace, check the view bar, shown by the red arrow below. The view bar controls which workspaces appear in the list.

Try switching to different views to see if your workspace appears. If your workspace is unavailable, contact your Relativity administrator.

### 3.2 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 clicking the vertical Hide Browser or Show Browser link directly to the right of the browser. Clicking Hide Browser closes the browser and expands the item list manager to the full width of the Relativity window. The filtered selections you choose in the browser
appear on the vertical bar when the browser is hidden. Reopen the document browser by clicking the Show Browser link.

You can also resize the document browser. Use the browser resize handle—the thick, black vertical bar to the left of the show/hide browser link—to resize the browser to suit your preference.

### 3.2.1 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><img src="folder_icon" alt="Folder" /></td>
<td>Folder browser</td>
<td>Navigate the folder hierarchy for your workspace</td>
</tr>
<tr>
<td><img src="field_tree_icon" alt="Field Tree" /></td>
<td>Field Tree browser</td>
<td>Browse your documents according to how they were coded</td>
</tr>
<tr>
<td><img src="saved_searches_icon" alt="Saved Searches" /></td>
<td>Saved Searches browser</td>
<td>Create a new search, or browse previously saved searches</td>
</tr>
<tr>
<td><img src="clusters_icon" alt="Clusters" /></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>

#### 3.2.1.1 Displaying file paths

The current browser location drives what appears in the item list. The breadcrumb, pointed to by the red arrow below, shows the current browser selection.

You can also access the breadcrumb by clicking on the Show Current File Path (⌕) icon.
### 3.2.1.2 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 are expanded, you can use the collapse (-) button to collapse subfolders back into their root folder.

Click **expand (+)** to view the subfolders:

![Folder with subfolders]

Click **collapse (-)** to get back to the root folder:

![Folder with collapsed subfolders]
3.2.1.3 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 are available in a tree structure.

![Field tree browser](image)

Each single and multiple-choice field has its own choice folder in the field tree. The field’s choices appear as subfolders. A [Not Set] choice is also available for each field, which displays null values for the field.

You can click on a choice within 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 e-mail 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 e-mail message is pre-populated 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 on fields associated with the choice folder.

### 3.2.1.4 Saved searches browser

A saved search combines many of Relativity’s searching tools into one feature-rich interface. For detailed instructions on creating saved searches, see the [Searching Guide](#).

**Note:** You can find all documentation on the kCura website: [www.kcura.com/relativity/support/documentation](http://www.kcura.com/relativity/support/documentation)

Included in the Saved Searches browser are two icons in the upper right corner:

- Search List
- Refresh

Clicking the Search List icon brings up a list of saved searches similar to any other item list in Relativity.
By default, the Search List View contains the options listed in the following table:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit link</td>
<td>Click this link to display the Saved Search Form, where you can modify the current settings for the search.</td>
</tr>
<tr>
<td>Name link</td>
<td>Click this link to display documents returned by the search in the item list. You can open documents from this list.</td>
</tr>
<tr>
<td>Path</td>
<td>Displays the location of the search. For example, the path “Salt vs. Pepper \ Admin \ Batch Source” indicates that the search can be found in the Admin folder, which is in the root Salt vs. Pepper folder.</td>
</tr>
<tr>
<td>E-mail icon</td>
<td>In the Saved Search List, click this icon to open an e-mail message containing a link to the Saved Search. You can also send a link by clicking this icon in the item list. The Subject line of the message is pre-populated with the following text: “Relativity Review - &lt;Workspace Name&gt; - &lt;Search Name&gt;.” When the recipient clicks on the link, the Saved Search is displayed with the current result set. (This option is also available in the Search Folder Tree. See the Searching Guide.) Note: Relativity will display a permissions denied message if the recipient clicks the link to display the search but does not have access rights to it.</td>
</tr>
</tbody>
</table>

Clicking the Edit Search ( ) icon takes you to that search’s edit page, where you can adjust any fields and save the search again.

Clicking the Save Search ( ) icon allows you to save the search under a different name and/or owner through the following window:
Clicking on the Refresh (⟳) icon refreshes the browser. Note that any edits you make to an existing search, in addition to creating a new search, will automatically trigger a refresh. However, newly created searches and/or edits made to existing searches by other users in the database will not show up until you click the Refresh icon.

**Note:** When sorting on a column, click the header once to sort in ascending order, twice to sort in descending order and a third time to clear the sort.

### Re-running an out-of-date search

When you navigate away from a search to another area of Relativity, that search is considered out of date. When you return to the Saved Searches browser you will be required to run the search again to view the results.

The following message appears when you return to the Saved Searches browser:

![Message](image)

Click **Re-Run Search** to reload the search results. Click **Edit Search** to go to the search’s edit page, where you can change its conditions.

**Note:** Clicking on the saved search name in the browser upon returning also re-runs the search and reloads results. If you edit any item returned in a saved search, you receive the message above when you save the edit. Again, you must re-run the search, even if the items you edited still meet the search conditions and the search returns the same number of documents.

### Saving searches on the Documents tab

On the Documents tab, you can use 📝 to save a search based on the criteria that you have already set for filtering, keyword searches, dtSearches, Analytics, and pivot. You can enter a unique name for the search, select an owner, and choose a folder for it. Relativity also saves any settings that you selected for the view, sort order, or other features that control how your results appear. After you save your search, it's available in the Saved Searches Browser, and you can modify it using the same options available for saved searches. For more information, see the [Searching Guide](#).
Note: To use Save as Search, you must have added permissions for Search and access to the Saved Searches Browser assigned to you through the Security page.

1. Navigate to the Documents tab.
2. (Optional) In the Browser menu, select the Folders, Field Tree, or Clusters option. The item list for the selected browser appears.

3. Filter on the documents in the list, or select a keyword or other search option. To set search criteria, see the Searching Guide. Your search results appear in the item list on the Documents tab.

Any folder, tag, or cluster selected in the browser is included as a condition when the search is saved. The currently displayed columns and sort order are also saved.

Note: If you select an option in the Include Related Documents drop-down, and also set the filters, you aren't able to save this search with Save as Search. You can set Include Related Documents drop-down to blank or clear all filters, and then use this link to save the search.

4. Click .

5. Select or enter the following information:
   a. Owner: Select Public to make the search available to all users with the appropriate permissions, or choose a specific user from the list. Click Me to select your name from the list, making the search private.
b. **Name**: Enter a title for the search. The title appears in the Saved Searches browser.

c. **Folder List**: Click the **Plus** button to expand the folders in the list. Highlight the folder where you want to add the search.

To access the search, users must have access to the Saved Searches Browser and at least view permissions for Search on the Security page. For information about security, see the Admin Guide.

6. **Click Save**. Your search criteria are saved and the search is added to the Saved Searches browser. You can click the Saved Searches icon to display this browser.

To update the search, you follow the same steps as those used to edit a saved search. Right-click on the search in the Saved Search browser, and click **Edit**. The Saved Search form is pre-populated with information used in your search.

### 3.3 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.

The view bar consists of the following sections:
3.3.1 Views

The view menu, highlighted in red above, controls the following:

- The documents included in the searching set (in addition to the browser selection and any active searches); this is based on a set of criteria, which might include:
  - All documents in a workspace
  - Documents that have been assigned to you
  - Documents that fall within a specified date range
- The fields returned; any field in the workspace can be included
- The default sort order

If you would like to add or edit a view, contact your Relativity administrator.

**Note:** Your Relativity administrator can create a personal view for you – a view that is visible only to you and the Relativity administrator. Contact your Relativity administrator to have a personal view created. (An administrator can see all the personal items of a user by setting the option View Another User’s Personal Items on the Workspace Details tab.)

3.3.2 Scope menu

The scope menu, highlighted in red above, 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.

3.3.3 Including related documents

Include related documents 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. Learn more about related items in the Related Items Pane section of this document.
3.3.4 Dictionary

When using dtSearch, a dictionary search option is available. The dictionary search allows you to search the index for a specific term and see the total occurrences of the term and the number of documents containing it. To launch the dictionary search, click Dictionary next to the keywords textbox.

For more information, refer to the Searching guide.

3.3.5 Icons

In the left hand of the view bar, one icon appears, and at the right end of the view bar, there may be one or two icons, as seen below:

Once you used 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.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="Icon" /></td>
<td>Show the current path. This allows you to copy your current browser location to the clipboard paste into various locations. Clicking this brings up the following:</td>
</tr>
<tr>
<td><img src="image2" alt="Icon" /></td>
<td>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.</td>
</tr>
<tr>
<td><img src="image3" alt="Icon" /></td>
<td>Edit the current view. This will only be present if you have permission to edit the view. If it is not present, contact your Relativity administrator to edit the current view.</td>
</tr>
</tbody>
</table>

3.4 Pivot

Using pivot, you can quickly analyze your case data to identify specific trends or patterns. You can use pivot to summarize data in tables or charts, simplifying this analysis process. You can also easily create ad hoc pivot reports using the options available on the pivot menu. To generate a pivot report, select a specific field for grouping data totals and further characterize this data by selecting a secondary field.
In the following screenshot, the user performed a pivot report on custodians to determine the number of documents reviewed and coded as responsive. The pivot grid displays these results in a table format that you can customize for more convenient viewing. See Working With Pivot Grid Results.

Administrators or users with the appropriate permissions can create custom pivot profiles that you can reuse on multiple data sets. You can configure these profiles with field information and formatting for charts, including line, pie, and bar graphs.

**Note:** Pivot’s availability isn’t limited to or dependent on where you are in the data set. This means you can perform a pivot on any Relativity field that you enabled for Group By and/or Pivot On even if that field isn’t displayed in the current view.

### 3.4.1 Using Pivot profiles

You can quickly generate a pivot report by using the customized Pivot Profiles developed for your organization. Custom profiles include configured settings for the Group By, Pivot On, and Date fields, as well as the chart formats. When you select a profile, the fields in the Pivot menu are automatically populated with predefined values. You can modify these values to run additional pivot reports, but your settings will not be saved.

**Note:** You cannot create or save modifications to Pivot Profiles unless you have the required permissions. To save an update to a profile, you must edit it on the Pivot Profiles tab.

Similar to Saved Searches, you can apply Pivot Profiles to your active data set without modifying it. To generate pivot results, select a predefined profile from the drop-down box. Pivot automatically applies the profile to your data and displays the results. Click **Clear** to remove the profile settings and reset the fields with their initial values.
3.4.2 Creating a Pivot chart

In addition to showing pivot results in the pivot grid table, you can also show the results graphically using the pivot chart. You set up a pivot chart the same way you set up a pivot grid. See the Creating a Pivot report section for details on field selection and considerations.

If you already have a pivot grid loaded, you can easily switch to or add a pivot chart by activating the component:

![Pivot chart example]

The pivot chart reflects the results of the query executed in the pivot grid above.

3.4.3 Working with Pivot chart results

Pivot Charts allow many customization options to optimize their look and feel. The options are accessed by clicking on the Chart Options icon (يدة) within the chart area.

![Chart options example]
- **Chart Type** allows you to choose the chart type:
  - *Bar* – displays rectangular bars with lengths proportional to the value that they represent. The value will be shown above the bar.
  - *Pie* – displays a circular chart (pie chart) divided into sections to illustrate each value within the pie. The value and percentage will be shown for each section.
  - *Line* – compares two values plotted along an axis: the vertical and horizontal. The value is shown where the two axis meet.

- **Sort On** allows you to select how you want the chart information to be sorted by:
  - Grand Total
  - Your selected “Group By” field

- **Sort Order** is a drop-down that allows you to choose between the ASC and DESC settings:
  - ASC will display the field information in ascending in order in both the chart and the grid.
  - DESC will display the field information in descending order in both the chart and the grid.

- **Show Grand Total** toggles the display of grand total in the Pivot Chart. This value can help add context, but may throw off the scale of the Pivot Chart and reduce readability.
  - Show Legend toggles the display of the Pivot Chart legend. This information can often be intuited from looking at the chart. If not, it can be added.
  - Show (blank) Values is a checkbox that allows you to show or hide totals in the Pivot Chart. Blanks counts may be high, so hiding them may improve the readability of the chart.
  - Show Labels toggles the value count labels on Pivot Charts.

Labels shown / hidden:

![Chart Type Examples](chart_type_examples.png)

- **Rotate Labels** rotates the group by labels at a 45 degree angle. This can help readability in fields with many values.
- **Stagger Labels** is another option to improve readability of group by values. Stagger labels varies the horizontal position of the labels to improve readability.

- **Vertical** allows you to change the axes of the report to vertical.
- **Horizontal** allows you to change the axes of the report to Horizontal.
- **Switch Series** switches the Group by and Pivot On positions. In the above examples, our Group By field – Custodian, was the value on the horizontal axis, while our Pivot on field – Responsiveness, drove the bars on the chart. Selecting Switch Series would put Responsiveness on the horizontal axis, and chart bars for each Custodian. This allows you to work with a chart without having to change the original pivot settings.

- **Set** confirms, saves and executes the new charts options.

Clicking the **Size to Fit** icon expands the Pivot Chart to the maximum size allowed in the current window.

In the bottom right corner of the chart window is the items per page drop-down. This drop-down allows you to expand the number of items displayed per page. While adding more items can give the chart more scope, adding hundreds of items can make the chart illegible.
3.4.4 Creating a Pivot report

You can create an ad hoc pivot report using the options available in the pivot menu. The pivot grid displays the results of your pivot in a summary table that lists intersecting values of the selected fields. It displays a visual representation of the data similar to spreadsheet totals.

Use the following instructions to create and generate your own pivot report:

- **Group By** displays fields that you can use to define the vertical axis of the pivot grid.

- **Pivot On** displays optional fields that you can select to break down the totals that appear in each row. Pivot On acts as the horizontal axis of the report.

**Note:** To use fields for Pivot, you must enable them in the fields grid. If you don't see a required object in the Group By or Pivot On fields, contact your Relativity Administrator for more information.

- **Date** summarizes on each unique date. If a date field is selected, you can choose how to summarize based on:
  - **Month** summarizes on each month. Month is only available in “Pivot on” if your “Group By” field is also a date.
  - **Year** summarizes on each year.
  - **YearMonth** summarizes on each Year/Month combination, such as Jul-09.

- **Go** button is used to apply the settings you specified to the data set. To stop a long running search, click **Cancel Request**. If you selected a pivot profile, the settings contained in the profile are applied. Please see Working with Pivot Results.

- **Save** allows you to store the settings you specified as a pivot profile. Once saved, the profile is available in the drop-down and in the Pivot Profiles tab. Clicking Save or Save As brings up a box containing a required Name field. This is the name of the pivot profile you want to save. Clicking **Save** here saves the profile. Clicking **Cancel** cancels the action.

- **Clear** button is used to remove the pivot settings from the display - fields are reset with their initial values. No changes are made to the data set or to existing fields. Likewise, if a pivot profile was selecting, clicking **Clear** only de-selects it – no changes to the profile itself are made.
3.4.5 Working with Pivot grid results

Pivot results are displayed in grid or table format determined by the selections that you made in the Group By, Pivot on, and Date fields. In the example below, the grid displays rows listing each custodian, and columns with the number of documents tagged as responsive.

Depending on your pivot criteria, your report may require additional formatting to display the data conveniently in the browser. Perform the following tasks to view or export your pivot results:

- **Resize columns** by left-clicking on the column header and dragging the header border.
- Browse through the records returned by using the navigation buttons in the upper right corner of the Pivot Grid.

- Expand the page size to display more records in the browser. Select a new page size from the drop-down list at the bottom of the Pivot Grid.

- Modify the sort order of the results. By default, your pivot results are sorted in descending order based on the Group By field. You can modify the sort order by clicking on any of the column headers. (Click once for a descending sort, and twice for ascending.)
- Refine your data set by filtering on specific fields. Click Show Filters to display fields for the columns in the grid. Select one or more fields, and click the Enter key. See the Searching Guide for more information.

- Perform searches on your data by selecting a keyword search, dtSearch, or Relativity Analytics from the Search With drop-down. You can also click the Search Conditions icon to display the boxes for defining conditions. For more information, see the Searching Guide.

- Create a saved search based on any search or pivot criteria that you entered. Click . For more information, see Saving Searches on the Documents Tab.

Note: If you select an option in the Include Related Documents drop-down, and also set pivot criteria, you will not be able to save this search with Save as Search. You can the set Include Related Documents drop-down to blank, and then use this link to save the search.

- Export your pivot results to a file. Select Export to File from box in bottom left of the Pivot Grid, and click Go. Your results will be exported as an Excel spreadsheet (.xls file).
3.4.6 Pivot menu

The Pivot Menu is available in the workspace, document, and other browser modes. It displays the options to perform reports on pivot-enabled items listed in any view or saved search. To display the menu, click the pivot icon in the upper right corner of an item list.

The pivot menu contains the following sections:
- Pivot Profiles are predefined pivot configurations that you can apply to the data in the current view or tab.
- Display Settings are used to show or hide the grid, chart, and item lists.
- Pivot Settings include options for selecting the Group By and Pivot On settings used in ad hoc pivot reports.

3.4.7 Emailing or saving a pivot chart

Use the right-click functionality in the chart area to save the information outside of Relativity. Right-clicking allows you the following options:
- Save Picture As
- E-mail Picture
- Print Picture
3.4.8 Using Pivot to filter your document list

You can filter on documents directly from the Pivot Grid or Pivot Chart.

In the Pivot Grid, click a cell once to add it to your filter list. This adds the item, but does NOT execute the filter.

Selected cells display in yellow. Multiple selections can be made to refine the filter further.

Selected filters will display in the bar below the pivot grid / chart. When you have selected the desired filter conditions, ensure that “Set Filters” is applied in the drop-down, and click Go.

This filters the document list. Applying this filter will open the document list if it was hidden while you were working with the Pivot Grid.

If you would like to work strictly with the document list after applying the filter, you can hide the Pivot Grid and/or Chart by deselecting the icon.

Hiding the Pivot Grid brings up a filter bar above the item list, showing the active filters.
3.4.9 Filtering the document list with pivot chart

Using the pivot chart to filter the document list works much like filtering from the pivot grid. To filter in the pivot chart, click on the desired bar, line plot, or pie chart slice. Although there's no change to the chart, the filter selection appears in the filter bar. Click Go to apply the filters to the document list. To stop a long running search, click Cancel Request.

3.4.10 "Pivot Data is Out of Date"

Pivot grids or charts don't automatically refresh if you change your data source. Your data changes when you move to a new folder, move to a new choice, apply a filter, or a search. If you change the data source, you see a message above the pivot: “Pivot data is out of date. Please run the pivot.”

If the pivot grid and pivot chart are grayed out, it means that the data no longer applies to the current document set.
If the chart appears grayed out, click **Go** to re-run the pivot with the new data set. To stop a long running search, click **Cancel Request**.

### 3.5 Navigation bar

Based on the selections in your document set information bar, you can navigate the item lists using the navigation bar. The navigation bar appears in the upper-right corner of the item list manager.

![Navigation bar example]

The Show Filters link allows you to apply a filter on any field in the item list. Filters can help you narrow the item list to focus on key records. For information on how to use filters effectively, see the [Searching guide](#).

**Note:** You can find all [[[Undefined variable kCuravars.Product Name]]] documentation on the kCura website: [www.kcura.com/relativity/support/documentation](http://www.kcura.com/relativity/support/documentation)

Your selections in the information bet set your browsing options. Below, the display set is 1000 documents, and the returned set is 25 documents. Therefore, you’re able to browse through those 1,000 documents in 25 document sets.

![Navigation bar example]

To jump to a specific document, you can enter a record number in the textbox shown above and click enter. You can also use the navigation arrow links.

![Navigation bar example]

The navigation arrows do the following:

- **Top of first page**
- **Previous page**
- **Next page**
- **Last page**

If you would like to browse the documents in the core reviewer interface, click on a document identifier to launch that document. Remember, you're able to browse only the selected returned set. However, you can always add more documents if you need to.

### 3.6 Searching

You can run a search on your entire searching set by selecting an index from the Search drop-down in the upper-right corner of the item list manager. The options in your drop-down vary with each workspace.
You can also click the **Search Conditions** icon (🔍) to display the boxes for defining conditions. For more information about search indexes and conditions, see the [Searching guide](#).

### 3.7 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 bar at the edge of the column header. A double arrow indicates that you can move the column. You can drag it either direction to widen or narrow the column. The other columns on the page will 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 **Reset Column Sizes**.
3.7.1 Previewing a document

Note that if you hover your mouse pointer over a record’s file icon, you can left-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.

3.7.2 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 theReviewer 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 unable to sort a particular field, you should contact your administrator and make sure the field has the Sort option set to Yes.
3.8 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 what subset of your searching set Relativity returns. Your returned set is controlled by the drop-down seen in the above screenshot.

Note: The size of your returned set DOES NOT 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.

Any mass operation you run can be based on the number of checked items in the item list, the number of returned items, OR all the items in your searching set. Mass operations are further detailed later in this document.

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 aren’t able to browse to document 501 in the viewer.

However, you do have two courses of action:
- Add more documents
- Apply filters to bring back only the documents you’d like to browse.

3.8.1 Adding more documents

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

3.8.2 Applying filters

You may find it beneficial to use searching or filtering to narrow your searchable set, allowing you to browse through the key documents in the viewer.

For example, let’s say your workspace is 120,000 records, and you’d like to see documents in the middle of the workspace: EN045340 through EN045960. To get to those documents, click on Show Filters in the navigation bar, enter EN045340 BETWEEN EN045960 in the identifier field, and click Enter. The results become your searching set, allowing you to browse the documents.
Similarly, if you’re looking for documents after a specific date, say December 5, 1998, you could filter the correct date field with the search term >=12/5/98.

These are just two examples. For more information on searching techniques, see the Searching guide.

Note: All Relativity documentation can be found in the reference guides section of the kCura Support site: www.kcura.com/relativity/support/documentation

The set selector expanded below sets the number of documents shown in the item list at one time. The option you select remains the default during your session until you select another option.

4 Core Reviewer Interface

By clicking on a document identifier, you open the document in the core reviewer interface.
The core reviewer interface screen consists of four panes: persistent highlight sets (if activated), viewer, layouts, and the related items pane.
Several viewing options can be toggled using the icons in the upper-right-hand corner of the window.

4.1 Keyboard shortcuts

Clicking the ( ) icon displays the Keyboard Shortcuts Legend, which includes the following sortable columns:

- **Keyboard Shortcut** is the key-combination used to execute the shortcut during document review.
- **Action** is the action that results from using the keyboard shortcut.
- **Viewer Mode** lists the viewer mode for which each shortcut is available. Note that most of the system category shortcuts can be used in all viewer modes.
- **Category** lists the shortcut type. Below, the legend displays only those shortcuts designated by the System and Internet Explorer. This column also lists all field and choice shortcuts that your administrator configured via field and choice properties.
- **Note** the following Keyboard Shortcut Tips listed above the legend:
  - Shortcuts only execute in the Core Reviewer Interface.
  - Shortcuts only execute in the Viewer Modes listed in the legend.
  - If the document viewer is undocked, shortcuts that move the cursor focus to a textbox will only execute if Internet Explorer has a single tab open.
4.1.1 Special considerations for keyboard shortcuts

Please keep in mind the following when working with Relativity’s keyboard shortcuts feature:

- Keyboard shortcuts are active when:
  - Keyboard shortcuts are enabled
  - Focus is in the Core Reviewer Interface
  - The viewer is docked or Undocked and IE only has one tab open
  - If the shortcut overlaps with a Windows shortcut, both shortcuts are triggered; for example, if a program installed on a user’s computer uses the CTRL-ALT-R shortcut, clicking CTRL-ALT-R triggers that action regardless of whether a user is in Internet Explorer or not

- Keyboard shortcuts aren’t triggered when:
  - Keyboard shortcuts are disabled
  - Focus is NOT in the Core Reviewer Interface
  - The Stand-Alone viewer is launched
  - The viewer is undocked or in Stand-Alone mode and IE has more than one tab open
  - Viewing a document in NATIVE mode

- When the numbers 0-9 are used as shortcuts, they only fire when the user presses these digits in the main section of the keyboard, namely in the row above the letters. The shortcut doesn’t fire if the user presses those digits found in the keypad.

The following table outlines what Document Field types users can define shortcuts for and what behavior the shortcuts trigger:
### Field Type

<table>
<thead>
<tr>
<th>Field Type</th>
<th>Can define shortcut?</th>
<th>Layout Display Type</th>
<th>Behavior</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed Length Text</td>
<td>Yes</td>
<td>Text</td>
<td>Focus jumps to textbox</td>
</tr>
<tr>
<td>Long Text</td>
<td>Yes</td>
<td>Text Only</td>
<td>Focus jumps to textbox</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Rich Text</td>
<td>NO ACTION</td>
</tr>
<tr>
<td>Date</td>
<td>Yes</td>
<td>Date</td>
<td>Focus jumps to textbox</td>
</tr>
<tr>
<td>Whole Number</td>
<td>Yes</td>
<td>Integer</td>
<td>Focus jumps to textbox</td>
</tr>
<tr>
<td>Decimal</td>
<td>Yes</td>
<td>Decimal</td>
<td></td>
</tr>
<tr>
<td>Currency</td>
<td>Yes</td>
<td>Currency</td>
<td></td>
</tr>
<tr>
<td>User</td>
<td>Yes</td>
<td>Drop-down</td>
<td>Drop-down choices are toggled</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Picker</td>
<td>NO ACTION</td>
</tr>
<tr>
<td>Boolean</td>
<td>Yes</td>
<td>Checkbox</td>
<td>Checkbox state is toggled</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Drop-down</td>
<td>Drop-down choices are toggled</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Radio buttons</td>
<td>Radio button selected</td>
</tr>
<tr>
<td>Single Choice</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multiple Choice</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single Object</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multiple Object</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>File</td>
<td>No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The following table outlines what Document Choices users can define shortcuts for and what behavior the shortcuts trigger:

<table>
<thead>
<tr>
<th>Choice Type</th>
<th>Can define shortcut?</th>
<th>Layout Display Type</th>
<th>Behavior</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choice associated with Document Single Choice Field</td>
<td>Yes</td>
<td>Radio button</td>
<td>Choice is selected/deselected</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Drop-down</td>
<td>Choice is selected/deselected</td>
</tr>
<tr>
<td>Choice associated with Document Multiple Choice Field</td>
<td>Yes</td>
<td>Checkbox</td>
<td>Choice is selected/deselected</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Popup Picker</td>
<td>NO ACTION</td>
</tr>
</tbody>
</table>

- The following are keyboard shortcuts for system actions:
  - **Alt + Down Arrow** – Next Annotation
  - **Alt + E** – Switch to Long Text Mode
4.2 Document viewer

The document viewer displays workspace documents. The document viewer menu displays the loaded forms of the documents and controls which form of the document appears in the viewer.

When a document has not yet been imaged, the following options appear:

<table>
<thead>
<tr>
<th>Viewer</th>
<th>Native</th>
<th>Extracted Text</th>
<th>Default</th>
<th>Image</th>
</tr>
</thead>
</table>

The document viewer menu displays additional options after the document has been imaged:

<table>
<thead>
<tr>
<th>Viewer</th>
<th>Native</th>
<th>Image</th>
<th>Extracted Text</th>
<th>Acme Production</th>
<th>Delete Images</th>
</tr>
</thead>
</table>

The document viewer toolbar options include the following:

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viewer</td>
<td>Opens the document using the Relativity native file viewer. This is a “quick print” version, showing how the file would look in its native application.</td>
</tr>
</tbody>
</table>
4.2.1 Viewer and extracted text toolbars

The viewer and extracted text options load the same toolbar. The features are described below.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Show/Hide Persistent Highlight Sets" /></td>
<td>Show/Hide Persistent Highlight Sets</td>
<td>Display or hide a panel containing all Persistent Highlight Sets in the workspace</td>
</tr>
<tr>
<td><img src="image" alt="Zoom" /></td>
<td>Zoom</td>
<td>Zoom in and out of the current document with a 10%-300% limit</td>
</tr>
<tr>
<td><img src="image" alt="Reset" /></td>
<td>Reset</td>
<td>Resets previous function</td>
</tr>
<tr>
<td><img src="image" alt="Find previous &amp; next" /></td>
<td>Find previous &amp; next</td>
<td>Searches for terms in document and navigates through the hits</td>
</tr>
<tr>
<td><img src="image" alt="Draft/Normal/Preview Display Modes" /></td>
<td>Draft/Normal/Preview Display Modes</td>
<td>Drop-down for different viewer display modes. Note: Draft mode doesn't render any embedded objects, including attachments, graphics, graphic borders, or table borders.</td>
</tr>
<tr>
<td><img src="image" alt="Fit to window width" /></td>
<td>Fit to window width</td>
<td>Available only in the preview mode</td>
</tr>
<tr>
<td><img src="image" alt="Print current document" /></td>
<td>Print current document</td>
<td>Prints the current document</td>
</tr>
<tr>
<td><img src="image" alt="Hide annotations" /></td>
<td>Hide annotations</td>
<td>Shows/hides all annotations or highlights in the document Note: This does not delete the annotations</td>
</tr>
</tbody>
</table>

If you do not see a form of the document present in the menu, the form has not been loaded for the workspace, or you do not have permissions to see it.
<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🔄</td>
<td>Go to next or previous highlighted term</td>
<td>Moves through previous highlighted terms in the document</td>
</tr>
<tr>
<td>☰</td>
<td>About Native Viewer and Bandwidth Tester</td>
<td>Displays the version of Relativity Web Client and Outside In Version.</td>
</tr>
</tbody>
</table>

### 4.2.2 Image viewer toolbar

The image viewer offers different functionality and loads a different toolbar. Image viewer toolbar features include:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🕵️</td>
<td>Zoom</td>
<td>Allows you to zoom in and out of current document with a 10%-300% limit</td>
</tr>
<tr>
<td>🕵️</td>
<td>Fit options</td>
<td>Fit actual (resize to 100%); Fit width (resize to the width of the page); Fit page (resize to the height of the page)</td>
</tr>
<tr>
<td>🕵️</td>
<td>Rotate all document pages clockwise</td>
<td>Rotates all pages in a document clockwise 90 degrees</td>
</tr>
<tr>
<td>🕵️</td>
<td>Rotate current page clockwise</td>
<td>Rotates the current page clockwise 90 degrees</td>
</tr>
<tr>
<td>🕵️</td>
<td>Print</td>
<td>Prints the current document</td>
</tr>
<tr>
<td>🕵️</td>
<td>Switch to normal mode</td>
<td>Allows users to select within a document</td>
</tr>
<tr>
<td>🕵️</td>
<td>Highlight</td>
<td>Highlights selected text</td>
</tr>
<tr>
<td>🕵️</td>
<td>Redact</td>
<td>Stamp redaction</td>
</tr>
<tr>
<td>🕵️</td>
<td>Redact with text</td>
<td>Text redaction; message can be customized by right-clicking on textbox after redaction is drawn</td>
</tr>
<tr>
<td>🕵️</td>
<td>Change markup visibility</td>
<td>Changes the visibility mode of the annotations between full visibility, transparent and hidden Note: Hidden annotations are not deleted</td>
</tr>
<tr>
<td>🕵️</td>
<td>About image viewer</td>
<td>Displays the version of Relativity Web Client installed; if the version is out of date, the symbol is red</td>
</tr>
</tbody>
</table>

Toggle all hidden cells in a Microsoft Excel spreadsheet by clicking on the **Show/Hide Hidden Cells (雱)** icon in the Viewer mode. This functionality is only available for excel files and doesn't translate to imaging, as Relativity only images those cells that aren't hidden.
4.2.3 Using the stand-alone document viewer

Clicking the Stand-Alone Document Viewer icon in the core reviewer interface brings up another viewer pane with an *Unsynced* designation at the top of the screen. This means that the Stand-Alone viewer is currently not enabled to be synchronized with the core reviewer interface.
Clicking Unsynced switches the Stand-Alone viewer to **Synced**, allowing you to view text and images, natives, and productions side-by-side while navigating through the document queue.

Please note the following about syncing the Stand-Alone viewer:

- It syncs with the core reviewer interface during document navigation. This allows you to view a document in several different viewer modes at the same time.
- You can launch more than one Stand-Alone viewer per document.
- Keyboard shortcuts are available for use in the Stand-Alone. For example, if you execute the shortcut for save and next in the Stand-Alone, each window performs the operation and moves to the next document.
- If you click the Return to Document List link, the Stand-Alone viewer disappears.
4.2.4 Markup sets

Depending on your permissions, you may see a drop-down in the lower-left corner of the viewer. The drop-down shows your available markup sets. Markup sets are securable sets of redactions and annotations.

If you have more than one markup set, check with your Relativity administrator to learn when to use each markup set.

4.2.5 Persistent highlight sets

If there are any persistent highlight sets in your workspace, you can see them displayed in a panel on the left side of the Viewer. You can expand and collapse each set by clicking the + and – signs next to the name. If the document you are currently viewing contains any of the terms specified in the set, you can view those terms and the number of times they appear in the document when you expand the set. If the document contains no terms from the set, you can't expand or collapse the set in the tree.

For more information on using persistent highlight sets in the viewer, please refer to the Relativity Admin guide.

4.2.6 Annotating and redacting within the image

You can use the image viewer’s annotation and redaction tools to mark up a document. Select the function you would like to use – highlight, black-box stamp redaction, or text redaction.
- **Highlight**, also known as an annotation in Relativity, creates a transparent yellow box where specified, just like using a highlighter.

> ryan.slinger@enron.com, paul.thomas@enron.com

**Cc:**

**Bcc:**

**Subject:** you don't need access to stack manager?

I assume that since you didn't respond to my first two emails, n this is incorrect, please respond to my previous emails.

- **Stamp Redaction** creates a solid black box where specified, like using a black marker.

> ryan.slinger@enron.com, paul.thomas@enron.com

**Cc:**

**Bcc:**

I assume that since you didn't respond to my first two emails, i this is incorrect, please respond to my previous emails.

- **Text Redactions** are white redaction boxes with black text. You can right-click on a text redaction box to apply different text to the redaction box. The text options are set by your Relativity administrator.

**Note:** If two people edit a redaction at the same time, an error will occur.

### 4.2.7 Editing or deleting markups

Using the Edit feature, you can apply any term to a redaction. You can also right-click and select **Edit**.

**Allen, Paul**

**From:** messenger@ecm.bloomberg.com

**Sent:**

**To:**

**Cc:**

To delete an annotation or redaction, right-click it and click **Delete**. You can also hover over the redaction, and when it is outlined in red, press the **Delete** key.

### 4.2.8 Controlling markup visibility

You can toggle the annotation and redaction visibility. Click the **Change Markup Visibility** button to change the setting.

Clicking the Change Markup Visibility button once sets the markups to transparent.
Clicking the Change Markup Visibility button a second time sets the markups to invisible. The redactions have not been deleted. They are temporarily hidden.

Clicking the Change Markup Visibility button a third time will return the markups to full visibility.

4.2.9 Navigating through markups

In the viewer, you can locate markups in a document using the markup navigation pane. To open this pane, click the (🔍) Markup Finder icon in the lower right corner of the viewer. The markup navigation pane displays a list of all redactions, redactions with text, and highlights made in the document, as well as references to their page numbers and parent markup sets.
You can click the hyperlinked page number to display the page where the markup was added. In addition, Relativity updates the active markup set to the one associated with your hyperlinked selection in the markup navigation pane.

### 4.2.10 Using the thumbnail viewer

When in Image or Production mode, you can access thumbnail renderings of the document's pages you're currently working with in the core reviewer interface. This allows you to quickly scan, locate, and delete any malformed or blank Images within the document.

**Note:** The **Delete** functionality appears only when viewing documents in Image mode, not when viewing in Production mode.

To enable the thumbnail viewer, you must uninstall any previously existing versions of the Relativity web client and viewer and reinstall version 7.3 or above.

The admin operation permission called **View Image Thumbnails** determines access to the thumbnail viewer. If you don't have this permission, contact your case administrator.

The thumbnail viewer is enabled in the new version of the viewer if your group has permissions to see the thumbnail viewer and if you're in Image mode or Production mode in the viewer. To access thumbnails while in Image mode or Production mode, click the **Show Thumbnails** option below the core reviewer pane.
The thumbnail viewer is displayed at the bottom of the screen. It provides the first set of pages in the document from left to right. When you click *Show Thumbnails*, the option is changed to *Hide Thumbnails*.

Thumbnail images of the pages contained in the document display in sets in the thumbnail viewer panel below the main viewer pane. When you click a thumbnail from the set, the corresponding document displays in full size in the view pane.

The number of thumbnail images contained 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.

If all the pages for the document are visible in one set of thumbnails, an inactive gray arrow displays to the left and to the right of the thumbnails.
If the document you are working with contains more pages than can be displayed in one set, the arrow to the right of the thumbnails turns blue and displays the text **Next Set**. Use this arrow to advance to the next set of thumbnails.

Once in the next set of thumbnails, the previously inactive gray arrow to the left of the thumbnails turns blue and displays the text **Prev Set**. Use this arrow to return to the previous set of thumbnails.

### 4.2.10.1 Using the thumbnail viewer slideshow

When you access the thumbnail viewer, the buttons **Play** and **Pause** display below the thumbnail viewer panel. Click **Play** to begin a slideshow of the thumbnail sets in the thumbnail viewer. Click **Pause** to pause the slideshow.

If you are in Play mode and you click a thumbnail from the current set, the corresponding document displays in full size in the view pane and Play mode is paused. Click **Play** again to continue advancing image sets.

Using the speed controller, you can adjust the speed with which thumbnail sets are advanced. The slowest speed is 3 seconds per thumbnail image; the fastest speed is 0.5 seconds. When you first load the thumbnail viewer, the speed controller is set to the middle speed.
Thumbnails advance as a set; the amount of time after which they advance is determined by the number of thumbnails in the set. For example, if your screen allows six thumbnail images to appear in the thumbnail viewer at once and the slideshow speed is set to the slowest speed (3 seconds per thumbnail), that set of thumbnail images appear in the thumbnail viewer for 18 seconds before advancing to the next set.

You can adjust the speed of the thumbnail viewer slideshow while in Play mode or Pause mode. If you adjust the speed controller while in Pause mode, once you click Play, the slideshow advances at the new speed.

If you adjust the speed controller while in Play mode, the new speed is reflected for the next set of thumbnails. The currently displayed set of thumbnails continues to advance at the previously set speed; once that set of thumbnails advances, the following set advances at the new speed.

While in Play mode, if you click any thumbnail, the slideshow pauses and the thumbnail viewer mode switches to Pause. The Pause button appears and the Play button becomes enabled.

When you reach the end of the slideshow, the Play and Pause buttons are both disabled.

4.2.10.2 Markups in the thumbnail viewer

Any redactions made to a document image before the thumbnail viewer is launched for the first time appear on the thumbnail rendering of that imaged document. Any subsequent redactions to the document image require a refresh of the thumbnail viewer to appear on the thumbnail version. To refresh the thumbnail viewer, click Hide Thumbnails and then click Show Thumbnails again.
If you rotate a document image before launching the thumbnail viewer, the thumbnail rendering of that document image reflect its new rotation. Any subsequent rotation changes to a document image require a refresh of the thumbnail viewer to appear on the thumbnail version. Refresh the thumbnail viewer by clicking Hide Thumbnails and then clicking Show Thumbnails again.

When you switch to a different Markup Set via the Markup Set drop-down to the left, both the main viewer and thumbnail viewer automatically update to reflect the new markup set being used.

When you use the Change Markup Visibility button at the top of the main viewer, the thumbnails reflect changes to markups.

### 4.2.10.3 Deleting blank images

If you encounter any blank images in the Thumbnail Viewer, you can easily delete them by clicking on the image itself. Clicking on the image once puts a blue highlight around the thumbnail and activates the red Delete button.

![Thumbnail Viewer with Delete button highlighted](image-url)

**Note:** The **Delete** functionality is present only when viewing documents in Image mode, not when viewing in Production mode.

Clicking the Delete button prompts you to delete the highlighted thumbnail(s). Confirm the deletion by clicking Yes on the prompt.

Using SHIFT-click on the last image in the current set marks all thumbnails currently displayed in the viewer for deletion. No other thumbnails other than those currently displayed in the set can be marked for deletion.

Using CTRL-click on a thumbnail while another is already highlighted marks both for deletion.

When you click the blue Delete All Images button in the upper right corner of the main viewer, the thumbnails below aren’t visibly marked for deletion, but you’re prompted to confirm the deletion of all imaged pages in the document.

### 4.2.11 Working with transcripts

You can load ASCII transcripts into Relativity, and then work with them as you would other documents. In the viewer, you can also use the following features, which are available only for transcripts:

- Create a word index for a transcript
- Create links to other document within transcript
- Add inline tags to a transcript
4.2.11.1 Creating a word index for a transcript

Relativity offers word-indexing for transcripts. Word indexes provide a page number list for each word in the file that link to the word location.

**Note:** Before you can create a word index, you must process the transcript. See [Process transcripts](#) for more information.

Access the word index by clicking the book icon on the lower-right corner of the viewer with a transcript open.

The word index displays all non-noise words in the index, the page and line location of each of the occurrences, and the total number of times the word appears in the index.

**Note:** The word index is sorted in alphanumeric order, so it starts with numbers. It is filterable, so to see all words that start with “a,” click show filters and enter “a.”

To begin using the word index, enter into the filter bar the term – or part of the term – that you’d like to see. For example, if you wanted to see all of the instances in which there was an objection in the deposition, you would activate the filters, type “objection” in the filter bar, and click enter.

![Word Index](Image)

That search informs you there are three occurrences of the word objection in the transcript. The locations are listed by page number, a colon, then the line number. They are also hyperlinked; thus, clicking on the location jumps you to that location in the transcript.
**Note:** Right-click tagging and linking – may also be very useful. Transcripts often are hundreds of pages long, so being able to tag key sections or link to exhibits can be valuable.

### 4.2.11.2 Creating links in a transcript

Within the Relativity viewer, you can select a section of the text in a transcript and link it to another document.

**Note:** Before you can create links, you must process the transcript. See [Process Transcript](#) for more information.

To create a link, select a section of text in the viewer, right-click and select **Link**.

Selecting Link on the right-click produces a pop-up, allowing you to select the document to which you’d like to link.
Select the document to which you’d like to link from the list. Note that you can filter the list, so if you know the document identifier – or even the prefix – you quickly can find the desired document.

Linked text is shown with green text and underlined.

Clicking the link launches the record in a Stand-Alone viewer.

If you would like to remove a link, right-click to bring up the right-click menu, and then click **Remove**.
Note that all links on the active record appear in the related items pane, which is outlined later in this document.

### 4.2.11.3 Inline tagging in the viewer

You can right-click and tag a section of a transcript as a choice. This inline tag applies to the transcript. Your Relativity administrator can color-code your choices.

For example, issue coding is a common task. However, if a transcript is large and covers many topics, it may be difficult to identify which part of it relates to which issue.

**Note:** Before you can add an inline tag, you must process the transcript. See [Process Transcript](#) for more information.

To tag a section of text with a value, select the text, right-click and select Tag.
Clicking Tag brings up the inline tag layout.

On the tag layout, you can code the correct value and enter a note. Sometimes, tags may overlap. Consider the following example:
The sentence mentions “rent rolls” and it is also “hot.” The tag feature allows for overlapping tags. Below, the first section has been tagged as rent and is in green.

In the next example, the second half of the sentence has been tagged with a different value.
To identify all the tags on a document, you can open up the tag list by clicking the green tag icon in the lower-right corner of the viewer window. This icon is only available for transcripts.

Clicking the tag list icon brings up the tag list pane, which shows all the tags on the record.
The entries in the tag list pane are hyperlinked. Clicking on the link highlights the active tag in blue in the viewer.

**Note:** Note that new inline tag you apply doesn’t appear in the tag list pane until you reload the record or refresh the pane. The refresh button is in the upper-right corner of the pane.
You also can edit or remove a tag. Right-click on the tag to access the menu.

Clicking Edit Tag allows you to edit the same layout you used to apply the tag. Clicking Remove removes the tag.

If the area you right-click to edit or remove has overlapping tags, you are presented with a selection box.
Select the tag you’d like to edit or remove, then click OK to continue with the action.

4.2.12 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. The Add Fact option is located under Add to CaseMap when you right-click in the viewer.

**Note:** CaseMap is not compatible with Windows 8.
If you have not yet linked the source document to CaseMap, the first step after clicking Add Fact is to do so.

The three steps to link the document to CaseMap are:

1. Choose the CaseMap category for the document. The options are:
   - Document
   - Pleading
   - Proceeding
   - Research Authority
   - Other

2. Enter a Full Name for the new document you are linking to CaseMap.

3. Enter a Short Name for the document you are linking.

4. Click the Advanced link only if you want the option to Save or Save & Edit the document linking information you have already entered.

5. Click OK.

Once the source document is linked to CaseMap, you can proceed with adding the highlighted text excerpt as a fact through the following dialog box:
Although none of the settings above requires completion or editing in order to add the new fact, you may want to specify any or all of them for the sake of distinguishing this fact from others in CaseMap. Click OK to add this as a new fact. When you view your CaseMap, you should see the new fact added.
4.3 Navigation

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

You can type a number into the textbox and hit Enter to move to that document. You can use the navigation buttons:

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Top of first page Previous page Next page Last page

Note that you can't browse past the last document in your returned set. For example, in the above screenshot, there would be no way to get to document 1,001 using the above arrows. For more information on changing your returned set, see Document set information bar.

4.4 Layouts

Layouts, found in the upper-right corner of the core reviewer interface, are web-based coding forms. They give you access to view and edit document fields. To access the layout list, click the drop-down menu above the layouts pane:
You may have access to one or more layouts. Layouts correspond to a particular review process or task and contain only the fields necessary to complete the task. This is done to keep the area uncluttered. If you feel your layout is incomplete, or that you need access to a different layout, contact your Relativity administrator.

**Note:** Your Relativity administrator can create a personal layout for you – a view that is visible only to you and the Relativity administrator. Contact your Relativity administrator to have a personal layout created. (An administrator can see all the personal items of a user by setting the option View Another User’s Personal Items on the Workspace Details tab.)

If you simply are learning about the documents, select the layout that provides you with the proper information and browse the documents with the layout in view mode.

If you need to make changes to editable fields, select the correct layout, then click the **Edit** button next to the layout selector.
Any fields in the current layout that have been set to editable are open for changes.

Note that the Responsiveness field above is orange. Any field with an orange label is required. You aren’t allowed to save any other changes to the document without setting a value for required fields.

**Note:** In layouts, you can use the **Tab** key to highlight a checkbox in a Yes/No or Multiple-Choice field.

### 4.4.1 Adding a choice

An **Add** link appears on all Single Choice and Multiple Choice fields on your layout.
Clicking this link allows you to add an additional choice directly from the layout without navigating to the **Choices** tab. The **New Choice** dialog appears.

The fields to be entered for a choice are as follows:
- **Name** is the choice value.
- **Order** is a number that represents the position of the choice in relation to the field’s other choices. The lower the number, the higher the position on the list. Items that share the same value are sorted in alphanumeric order. Clicking on the **View Order** button allows you to see the order of the other items in the choice.
  - Pane order can be any integer (positive or negative). No decimals are allowed.

### Order Reference

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Name</th>
<th>Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>(All)</td>
<td>(All)</td>
<td></td>
</tr>
<tr>
<td>Not Sure</td>
<td>Not Sure</td>
<td>1000</td>
</tr>
<tr>
<td>Privileged</td>
<td>Privileged</td>
<td>2</td>
</tr>
<tr>
<td>Privileged \ Attorney Client</td>
<td>Attorney Client</td>
<td>1</td>
</tr>
<tr>
<td>Privileged \ Work Product</td>
<td>Work Product</td>
<td>2</td>
</tr>
</tbody>
</table>

**Note:** It’s always a good idea to “order” by 10s, 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 all items.

- **Parent choice** allows you to select a parent choice below which the current choice nests.
  - Once you have set your family of choices and tagged values, editing a parent choice creates inconsistencies.

**Note:** If you need to change a parent choice, create a new choice family, mass-edit the applicable documents, and then remove the old choice.

- **Highlight Color** allows you to set the annotation for the choice if it’s available for right-click tagging.

  In the Keyboard Shortcut section, you can designate a keyboard shortcut for this choice. For more information, please refer to the Keyboard Shortcuts section of this document.

  Once the new choice is created, it appears selected in the choice field on your layout. If you’ve created multiple new choices, the last one created is selected.

  New choices also appear in the Choices list view that appears when you click the **Choices** tab.

### 4.4.2 Adding an object

An **Add** link appears on all single object fields on your layout, whether the field appears as a drop-down menu or as a pop-up picker.
Clicking the Add link allows you to add an additional object instance on the fly. For example, say you've created an object called Custodian in your workspace, and you've added the Custodian field to your document layout as a single object field. When you click the Add link to add a new custodian, the Add Custodian dialog appears.

From the drop-down menu, you can choose a different custodian layout, which displays the fields configured for that layout. You can also click to edit the custodian layout. Changes to the custodian layout appear in this dialog and everywhere else that the custodian layout appears.

When you click Save, you return to the document layout, where the new custodian appears selected in the single object Custodian field.

If you've created multiple new custodians, the last one created is selected. New custodians also appear in the Custodians list view that appears when you click the Custodians tab.

### 4.4.3 Pop-ups on the layout

In most instances, you see your choices and objects as checkboxes and radio buttons, as you do above. However, there occasionally may be too many options to viably display on the layout – such as a large list of issues. In those instances, your Relativity administrator may present the field using a pop-up picker.

Clicking the ellipsis presents you with all of the choices on the field or objects available for the field.
Note that you can click Show Filters to filter your list if you don’t see your desired choice or object on the screen. For more information on filtering in Relativity, see the Searching guide.

If you are editing only one document, you can click Save to register your changes. If you are editing a list of documents, click the Save & Next button. This registers your changes and then moves to the next document.

4.4.4 Using the Copy from Previous toolbar

You can design a layout to include the Copy from Previous toolbar. This toolbar facilitates the review process by providing you with the ability to copy coding values from one document to another within a review session. In the layout, the Previous field displays the document identifier of the document that you last saved.
Relativity also displays the icon next to fields with values that can be copied from the previous document. After you copy the value into the field, this icon is replaced with the icon. The icon redisplays next to a copied field that you have modified.

**Note:** The default keyboard shortcut for the Copy from Previous button is Alt + Shift + Z. However, your workspace may be configured with a custom keyboard shortcut. Contact your Relativity administrator for additional information.

### 4.4.4.1 Understanding the Copy from Previous workflow

When you start a review session, you must code the values for the first document, and click Save & Next before you see the Copy from Previous button enabled on the document layout. Also note that the Previous field is updated with the document identifier of this first document.

Use the Copy from Previous button when you want to copy the coding values of the designated fields from the previously saved document to the current one. After Relativity populates the layout with these coding values, you can continue to modify them. Click the Save & Next button to save your changes, and continue the review process.
Note: If you click Save or Cancel, the layout is displayed as read-only and the Copy from Previous toolbar is disabled. You can click Edit to restart the review. You must then code the first document, and click Save & Next before the Copy from Previous toolbar is enabled. Whenever you leave Edit mode or select a different layout, you need to repeat this process.

4.5 Skipping to expedite review

During document review, you can use the Skip function to expedite the review process. This option sits at the bottom of the layout, but is only available if you have been given permission to it.

If Skip is selected, clicking the Save & Next button allows you to pass over any documents after the current document that do not already meet the View or Saved Search criteria until a document that does meet the criteria is found. Document skipping doesn't occur if any of the following occurs:

- The Skip drop-down is set to Normal
- The user clicks Save
- The user clicks Cancel
- The user clicks any of the document record navigators

The illustration below exhibits basic Skip functionality:
4.5.1 Skip scenario

Consider the following conditions under which Skip could be helpful:

- A user is using a view called My Unreviewed Documents containing documents that have yet to be reviewed.
- The Responsiveness field is used to indicate that a document has been reviewed.
- The My Unreviewed Documents view is looking at documents that have Responsiveness not yet set.
- Propagation is enabled for the Responsiveness field to family and duplicates.
- An email and its attachments are in your review queue.

Given these conditions, perform the following to see how Skip works:

1. Code the parent as Responsive. Because propagation is enabled, its attachments and duplicates are coded as Responsive.
2. Click Save and Next. Note that the attachments and duplicates to the email are skipped because they no longer meet the criteria of the My Unreviewed Documents view.
3. Although these documents are still part of the batch, the Responsiveness field has been set, thus disqualifying them from the condition. Instead, you see just the next document in the queue that is neither family to the email you just coded nor a duplicate of it.
4.6 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.

Below the related items pane, you find the related items menu bar.

The menu bar functions include the following:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Related items</td>
<td>Displays a group of documents related to the active document. Options vary within the workspace. Hover over each icon in the menu bar to display the name of the item. Examples are family group, duplicates or similar documents.</td>
</tr>
<tr>
<td></td>
<td>Document history</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>Production</td>
<td>Displays all productions in which the document was included. You may not have access to production information.</td>
</tr>
<tr>
<td></td>
<td>Linked</td>
<td>Displays all linked records on the active document. More information on linking documents can be found in Chapter 3 – Viewer.</td>
</tr>
<tr>
<td></td>
<td>Search results</td>
<td>Displays the results of a Relativity analytics search. More information can be found in the Searching Guide.</td>
</tr>
<tr>
<td></td>
<td>Batch sets</td>
<td>Shows all the batch sets for the active record. See Checking out batches. You may not have access to this section.</td>
</tr>
</tbody>
</table>

The related items pane allows you to quickly identify documents related to the active document. It also allows you to act on those groups of related items.

For instance, in the example of the related items pane below, the active document is an email, highlighted in yellow, with five attachments. You can select some or all of the documents in the related items pane and click Go. This brings up 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 entire range of documents. This is called mass-editing.
The same principal of mass-editing can be applied to documents in the item list manager back on the case workspace. For more information on mass-editing, see Mass operations.

4.7 Comparing extracted text

Relativity Compare lets you compare the extracted text of two specific documents, allowing you to understand the key differences. This field can be included in any view and displays the Compare icon.

Clicking the Relativity Compare icon opens the Document Compare selection window.
By default the document identifier of the selected document populates the Compare window. Click the ellipsis to the right of the With field to select a document to compare it with. You can change the value of either of these fields at any time while in the Compare window. When you click the ellipsis, the Available Items pop-up is displayed.

Select the desired document from the list, and then click **OK**.

The Document Compare window is refreshed loading the selected document in the With box. Next click **Compare**.

### 4.7.1 Comparing documents

The selected records are compared as shown below.
The similarities and differences between the documents are reflected in the legend at the bottom of the window:

- **Inserted** text is in green
- **Deleted** text is in red
- **Unchanged** text is in black

5 Reviewer options

When you first log in to Relativity, you see a list of your workspaces. You can click your name in the upper-right corner to see the mode drop-down.
By default, you are in Workspaces mode, which displays your workspaces. Depending on your permissions, you may have the option to edit your settings or reset your password. If you don't see the modes, your Relativity administrator can change the settings.

5.1 Reviewer options

When you first log in to Relativity, you see a list of your workspaces. You can click your name in the upper-right corner to see the mode drop-down.

By default, you are in Workspaces mode, which displays your workspaces. Depending on your permissions, you may have the option to edit your settings or reset your password. If you don't see the modes, your Relativity administrator can change the settings.
5.2 Logging In

To log in to Relativity, browse to your Relativity website. If you do not know the correct address, contact your Relativity administrator. After you enter the address, the login screen appears.

Enter your email address and password. If you do not know your login information, contact your Relativity administrator.

5.3 My settings

Clicking on My Settings takes you into a settings mode pop-up, which displays your user information. Click Edit to change your settings.
Clicking **Edit** allows you to edit your settings information. Note the orange fields are required.

- **First name** is your first name.
- **Last name** is your last name.

**Note:** Your first and last name will be used as your display name throughout Relativity.

- **Email address** is your email address and login.
- **Skip Default Preference** if changed from Normal to Skip will turn on the skip feature. When reviewing documents skip can eliminate a reviewer seeing documents already coded depending on the selected view.
- **Item list page length** is 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** is the default viewer mode.
  - Viewer
  - Native
  - Image
  - Long Text
  - Production
- **Advanced Search Public by Default** determines whether the saved search is 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, pre-loads the next native document in your review queue once the active document is loaded.
- **Data Focus** determines whether your default setting is to display the case name or hide it. Data Focus on will hide the workspace name at the top left and allow more space in the window for data information. This setting can also be changed from the Mode menu.

Once you have changed any settings as needed, click **Save**.
5.4 Resetting your password

There are two ways you can reset your password if your administrator has given you the appropriate permissions. You can use the Reset Password option inside Relativity or the Forgot your password? link outside Relativity.

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

5.4.1 Reset password inside Relativity

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

Enter your old password, then enter and retype your new password and click Save.

![Reset Password dialog](image)

You can use your new password the next time you log in to Relativity.

5.4.2 Reset 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.

![Login screen with忘记密码选项](image)
2. Enter your email address in the popup.

![Popup for entering email address]

An email is sent to the address that you provide. You should receive this email 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. We recommend opening the link in Internet Explorer. This link will be active for 15 minutes before it expires. If the link has expired, or if you click the link more than once, you'll have to generate a new password reset request.

The link directs you to a page where you can create a new password.

![Password reset form]

4. Enter a new password and retype it, then click Submit. When your password has been successfully reset, 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.

![Message for password reset success]

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**6 Checking out batches**

Your workspace workflow may require that you work with batches. Batches are sets of documents your Relativity administrator can create, allowing you to check out sets of documents to yourself. These batches are found on the Batches tab.

*Note: For a full explanation of creating and editing Batches, please see the Administrative guide.*

To check out a batch, go to the Review Batches tab (it may be named Batches in your workspace). Your Relativity administrator may give you instructions on which batches to check out. Find the batch you’d like to check out and click Edit. Note that you can’t check out batches that another user checked out.
After clicking edit, click **Check Out** on the resulting pop-up to check out the batch. Depending on permissions you might see a drop-down where you can select other users to assign batches. If the drop-down is not available you are only able to check out batches for yourself.

![Batch Edit](image)

Your Relativity administrator should have provided you with a view to display your checked-out documents. It's likely called “my checked-out documents” or something similar.

### 6.1 Checking a batch back in

When you're finished working with your batch, go back to the batches tab. Find your batch and click **Edit**.

![Batch Edit Pop-up](image)

Clicking **Edit** brings up the following pop-up. Depending on your work progress, check the batch back in, either as pending or as completed. Depending on permissions you might see a drop-down and a button to reassign a batch.
7 Mass operations for reviewers

Mass operations allow users to more easily and efficiently manage document sets during the review process. See the Admin Guide for more information on using mass operations in Relativity.

Note: You must have the appropriate mass actions permissions to use run a mass operation in Relativity.
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