

Quick Start Template

March 25, 2019

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1 Overview

Beginning in October 2017, you can use the RelativityOne Quick Start template to jump start the creation of a RelativityOne workspace. This template provides components meant for typical litigation workspace setup, including the Processing application with all catalog fields mapped, common searches and Profiles created.

Note: This template isn't required to use Relativity; it's an option for logically customizing your Relativity environment and minimizing the manual effort associated with new workspace customization.

Note: The Base Template is also available for selection when you're creating a workspace. This template is more simplified than the RelativityOne Quick Start Template in that it doesn't include the following applications: Processing, Analytics, Integration Points, Assisted Review, or Set Long text Field Size. The Relativity Base Template is the most basic form of a Workspace. There are only system fields and the applications required for Standard Relativity to function. This is a great template to test an application or start from scratch for an alternative use of Relativity.

The tab structure in this template is organized to correspond to typical workflow based on use. Tabs are listed from left to right or lowest to highest order into the following workflows: Documents, Workspace Admin, Entities, Processing, Indexing & Analytics, Imaging & OCR, Scripts, Search Terms Reports, Integration Points, Reporting, Production, Audit, Case Admin, Dashboards, Processing Duplication Workflow, and Assisted Review.

1.1 Template change log

To help you determine when to download the latest template files, the following table lists all updates made to the RelativityOne Quick Start template.

Component	Change	Date updated
Saved Search	dtSearch index search changed to remove condition of Text Size > .01	July 1, 2018

1.2 Recommended pre-work

To use the template, it will be useful to understand topics covered in Admin and Processing training.

- Relativity Admin training - <https://www.relativity.com/ediscovery-training/>
- See the Processing User Guide for more information on Data processing.

All aspects of workspace setup are found in the Admin guide. Use this guide to get a deeper understanding of certain caveats with case setup. Each section discusses different aspects of case setup followed by references that outline the fields, views and layouts that make up the template. This template is just a starting point for creating your own workspace template.

Any Workspace can be used for a template, but be aware that the system is copying the entire Workspace to start and this will require enough server space to hold two copies before it removes all the documents. Also using a large Workspace will increase the time it takes to create a new Workspace. Our suggestion is to keep an empty version of the workspace as a template and update the master as needed.

1.2.1 Advanced components

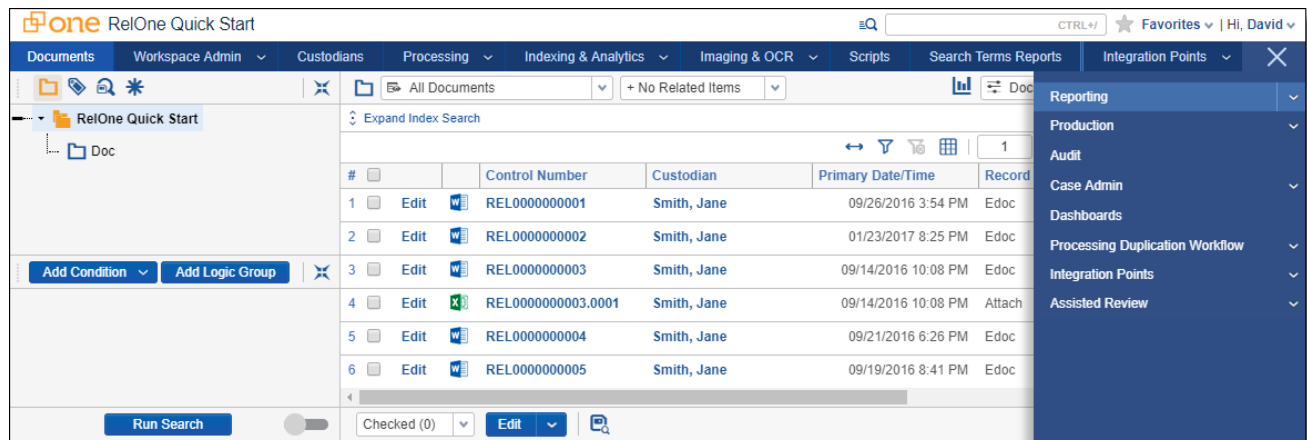
- Custom pages are available for programmers to use when creating custom layouts and dynamically display information stored in a Relativity database. They enhance application flexibility by providing the means to present or manipulate data in Relativity using formats other than layouts, views, or other Dynamic Objects. See the Admin guide for more information on custom pages.
- Object types are for more advanced workflows in Relativity. Each table of data is an object and in this tab you can manage things around a key object like the document or entity objects or create your own. Generally, users don't need to access to object types. See the Relativity objects guide for more information on object types.

2 Tab structure

The tab structure in this template is organized into the following workflows: Documents, Review batches, Reporting, Case admin, Index admin, Job admin, Application admin, Workspace admin, and Persistent lists.

2.1 Documents

The Documents tab in the RelativityOne Quick Start template is the starting point for more users, and it provides reviewers with access to workspace documents. See the User guide for more information on document review.



2.1.0.1 Document views

The RelativityOne Quick Start template includes the following workspace views. Document views guide workflows by dictating which documents get in front of users. Different views are useful for different actions on the database. An example is the email thread view or a privilege view for the privilege log.


Object	View Name	Description	Conditions	Selected Fields	Sort order
Docu- ment	All Docu- ments	System default view of all docu- ments loaded in the system	None	Edit, File Icon, Control Number, Custodian, Primary Date/Time, Record Type, Unified Title, Email From, Email To, Email CC, Respons- ive, Issues	None
	My Batched Out Docs	Displays all the logged in user's checked out documents	Batch these conditions – Batch::Assigned To is logged in user AND Batch::Status any of these In Progress	Edit, File Icon, Control Number, Custodian, Primary Date/Time, Record Type, Unified Title, Email From, Email To, Email CC, Respons- ive, Issues	None
	My Batched Out Inklus- ive Emails & Attach- ments	Displays all the logged-in user's checked out inclusive emails and attachments	Batch these conditions – Batch::Assigned To is logged in user AND Batch::Status any of these In Progress AND (Saved Search) docu- ment is in Inclusive Emails + Family	Edit, File Icon, Control Number, Email Thread- ing Display, Primary Date/Time, Custodian, Email From, Email To, Email CC, Responsive, Issues	Email Thread Group then Email Threading ID
	My Batched Out Unre- viewed Docs	Displays all the user's checked-out documents not coded in des- ignation field	Batch These Condi- tions – Batch::Assigned To is logged in user AND Batch::Status is any of these: In Pro- gress) AND Respons- ive is not set	Edit, File Icon, Control Number, Custodian, Primary Date/Time, Record Type, Unified Title, Email From, Email To, Email CC, Respons- ive, Issues	None
	Unreviewed Documents	Displays a list of documents that have not been reviewed for respons- iveness	Responsive is not set	Edit, File Icon, Control Number, Family Group, Custodian, File Name, Sort Date/Time, File Extension, File Type, File Size, Email From, Email To, Email CC, Responsive, Privilege, Confidential, Issues	None
	Responsive Documents	Displays a list of documents that have been reviewed	Responsive is any of these: Responsive	Edit, File Icon, Control Number, Family Group, File Extension, Sort Date/Time, Email Sub-	None

Object	View Name	Description	Conditions	Selected Fields	Sort order
				ject, Email From, Email To, Email CC, Last Modified Date/Time, Privilege, Confidential, Issues, Responsive	
	Privilege Log	Displays a list of documents that have been coded as privileged	Privilege is set	Edit, File Icon, Control Number, Family Group, File Extension, Sort Date/Time, Email Subject, Email From, Email To, Email CC, Last Modified Date/Time, Responsive, Privilege, Privilege Description, Confidential, Issues	Sort Date/Time
	Redacted Documents	Displays a list of documents that have redactions applied	Markup Set - Primary has any of these: Has Redactions	Edit, File Icon, Control Number, Family Group, File Extension, Sort Date/Time, Email Subject, Email From, Email To, Email CC, Last Modified Date/Time, Markup Set - Primary, Responsive, Privilege, Confidential, Issues	None
	Email View	Displays a list of emails, arranged by thread group	Email Thread Group is set	Edit, File Icon, Control Number, Email Threading Display, Custodian, Email From, Sort Date/Time, Inclusive Email, Inclusive Reason, Email Duplicate Spare	Email Thread Group then Indentation then Email Threading ID
	Inclusive Emails & Attachments	Displays a list of inclusive emails and attachments	(Saved Search) document is in Inclusive Emails + Family	Edit, File Icon, Control Number, Email Threading Display, Sort Date/Time, Email Thread Group, Email Action, Inclusive Email, Inclusive Reason, Responsive, Privilege, Confidential, Issues	Email Thread Group then Email Threading ID

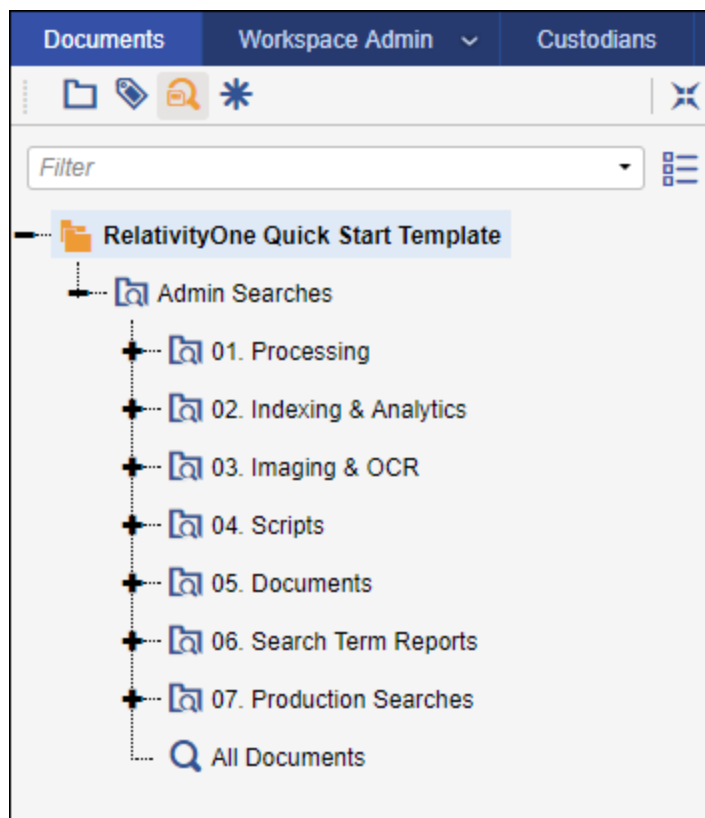
Object	View Name	Description	Conditions	Selected Fields	Sort order
	Textual Near Duplicate Groups	Displays a list of documents based on their textual near duplicate information	Textual Near Duplicate Group is set	Edit, File Icon, Control Number, Textual Near Duplicate Group, Textual Near Duplicate Similarity, Textual Near Duplicate Principal, Last Modified Date/Time, Custodian, File Type, File Size, Responsive	Textual Near Duplicate Group then Textual Near Duplicate Similarity then Textual Near Duplicate Principal
	Language Identification	Displays a list of documents based on their primary language	Primary Language is set	Edit, File Icon, Control Number, Primary Language, Docs-Languages, Docs-Languages::Percentage, Custodian, Unified Title, File Type, Responsive	None
	Production Documents	Displays a list of documents where the Bates Beg field has been set	Production these conditions Production::Begin Bates is set	Edit, File Icon, Control Number, Family Group, Production::Begin Bates, Production::End Bates, Production::Begin Attachment, Production::End Attachment, Bates Beg, Bates End, Bates Beg Attach, Bates End Attach, Sort Date/Time, Email Subject, Email From, Email To, Responsive, Privilege, Confidential, Issues	None
	Admin View	Displays system admin view of documents loaded in the system	None	Edit, File Icon, Control Number, Family Group, File Extension, Sort Date/Time, File Name, Document Folder Path	None

Object	View Name	Description	Conditions	Selected Fields	Sort order
	Processing Errors	Displays all documents that received errors during discovery and publish	(Saved Search) document is in <Name of Saved Search>	Edit, File Icon, Control Number, Level, Record Type, Custodian, Unified Title, File Extension, Sort Date/Time, Processing Errors, Processing Errors::Error Status, Processing Errors::Message, Processing Errors::Processing phase, Contains Embedded Files, Has Hidden Data, Password Protected, Speaker Notes, Track Changes, Unprocessable	None
	Technical Issues	Displays a list of documents that have been coded as having a technical issue designation	Responsive any of these: Technical Issues	Edit, File Icon, Control Number, Family Group, File Extension, Sort Date/Time, Email Subject, Email From, Email To, Email CC, Last Modified Date/Time, Responsive, Privilege, Confidential, Issues	None

2.1.1 Saved searches

You can access saved searches from the Documents tab with the  button in the upper left corner of Relativity.

The RelativityOne Quick Start template includes the following saved searches secured for system admins only:



Folder name	Saved search name	Description	Logic group	Conditions	Fields
Processing	Processing errors	Returns all documents on which a processing errors occurred.	+ No Related Items	Processing Errors these conditions Processing Errors is set	Edit, File Icon, Control Number, Level, Record Type, Custodian, Unified Title, File Type, Processing Errors, Processing Errors::Error Status, Processing Errors::Message, Processing Errors::Processing phase, Discover Errors on Child Documents, Discover Errors on Child Documents::Error Status, Discover Errors on Child Documents::Message, Discover Errors on Child Documents::Processing phase
Indexing & Analytics	dtSearch	Returns all documents returned by dtSearch	+ No Related Items	Extracted Text Size in KB is greater than 0.01	Extracted Text

Folder name	Saved search name	Description	Logic group	Conditions	Fields
		where the extracted text size is greater than .01			
Indexing & Analytics	Email Threading - Emails + Attachments	Returns all emails and attachments	+ No Related Items	Level is 1 AND Record Type any of these: Email AND Message Type any of these: Message	Edit, File Icon, Control Number
Indexing & Analytics	Email Threading - Parent Emails	Returns all parent emails	+ Family Group	Level is 1 AND Record Type any of these: Email AND Message Type any of these: Message	Edit, File Icon, Control Number, Level, Record Type, Message Type
Indexing & Analytics	Near Duplicate Analysis (No Parent Emails)	Returns all near duplicate documents but no parents	+ No Related Items	(Saved Search) document is not in 02.03 Email Threading - Parent Emails	Edit, File Icon, Control Number, Level, Record Type, Message Type
Indexing & Analytics	Language ID or Repeated Content	Displays a list of documents based on their primary language	+ No Related Items	Extracted Text Size in KB is greater than 0.01	Edit, File Icon, Control Number, Level, Record Type, Message Type

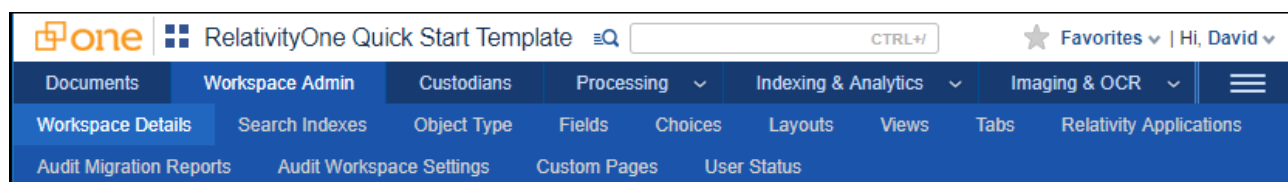
Folder name	Saved search name	Description	Logic group	Conditions	Fields
Indexing & Analytics	Analytics - Searchable Set	Returns documents with text present that can be utilized for analytics function where the extracted text size is greater than .01.	+ No Related Items	Extracted Text Size in KB is greater than 0.00 AND Extracted Text Size in KB is less than 30720.00	Extracted Text
Indexing & Analytics	Email Metadata Fields	Returns all emails with their metadata fields displayed	+ No Related Items	None	Email From, Email To, Email CC, Email BCC, Email Subject
Imaging & OCR	Extracted Text is Empty	Returns documents where the extracted text field is empty	+ No Related Items	Extracted Text Size in KB is greater than 0.01	Edit, File Icon, Control Number, Record Type, Custodian, Unified Title, File Type, File Size, Processing Folder Path, Artifact ID
Scripts	Parent Level Documents	Returns documents returned by the parent level documents script	+ No Related Items	Level is 1	Edit, File Icon, Control Number, Processing duplicate hash
Scripts	Document Level Documents	Returns all documents returned by the document level documents script	+ No Related Item	None	Edit, File Icon, Control Number, Processing duplicate hash
Scripts	Parent Level Dups + Family	Returns all parent level	+ No Related Item	Level is 1	Edit, File Icon, Control Number, Processing duplicate hash

Folder name	Saved search name	Description	Logic group	Conditions	Fields
		duplicate documents and their family members			
Documents	Single Recipient Emails + Family	Returns all emails that were received by a single recipient and their family members	+ Family Group	Level is 1 AND Email Recipient Count is 1	Edit, File Icon, Control Number
Documents	Bulk Emails + Family	Returns all emails that were received by bulk recipients and their family members	+ Family Group	Level is 1 AND Email Recipient Count is greater than 49	Edit, File Icon, Control Number
Documents	Inclusive Emails + Family	Returns all emails coded as inclusive and their family members	+ Family Group	Inclusive Email is Yes AND Email Duplicate Spare is No	Edit, File Icon, Control Number
Search Terms Reports	Search Term Report	Returns all documents returned by any search terms report	+ No Related Item	None	Edit, File Icon, Control Number
Production Searches	Excel Files	Returns all excel files	+ No Related Item	Relativity Native Type is like Excel AND Production these conditions Production::Begin Bates is not set	Edit, File Icon, Control Number, Relativity Native Type
Production Searches	Imaging Complete	Returns all	+ No	Has Images	Edit, File Icon, Control Number

Folder name	Saved search name	Description	Logic group	Conditions	Fields
		documents that were successfully imaged	Related Item	any of these: Yes AND Production these conditions Production::Begin Bates is not set	
Admin Searches (root)	All Documents	Returns all documents loaded into the workspace.	+ No Related Item	None	Edit, File Icon, Control Number

2.2 Workspace admin

The Workspace Admin tab in the RelativityOne Quick Start template provides options for working with the following features in Relativity:



2.2.1 Workspace details

On the Workspace Details page, Relativity displays read-only workspace settings, history information, Relativity Utilities console, Production Restrictions, and the Workspace Admin Group field. You can update the Production Restrictions field when you edit a workspace.

This page is extremely important for admins. The most useful component is the ability to manage the permissions of the workspace. This is also where you can get the compatible version of the Relativity Desktop Client to load or export data.

The screenshot displays the 'Workspace Admin' interface in Relativity One. The top navigation bar includes tabs for Documents, Workspace Admin (selected), Custodians, Processing, Indexing & Analytics, Imaging & OCR, Scripts, Search Terms Reports, Reporting, and Audit. Below this, a sub-navigation bar shows Workspace Details (selected), Search Indexes, Object Type, Fields, Choices, Layouts, Views, Tabs, Relativity Applications, Audit Migration Reports, and Audit Workspace Settings. The main content area is divided into three sections:

- Workspace Information:** Contains fields for Name (RelOne Quick Start), Client Name (RelativityOne Client), Matter Name (RelativityOne Matter), Status (Active), SQL Full Text Language (English), Client Number (1), Matter Number (Billing), Production Restrictions, and Workspace Admin Group.
- Resource Information:** Contains fields for Resource Pool (RelativityOne Pool), Default File Repository (\\files\T003\Files\), Default Cache Location (Default Cache Location), Aspera Credential (R1Aspera), Aspera Node Credential (R1AsperaNode), Database Location (SQLHA-INVARIANT01,24332), Enable Data Grid (Yes), and Download Handler URL (Relativity.Distributed).
- RELATIVITY UTILITIES:** Includes System Settings (Manage Workspace Permissions, Manage System Keyboard Shortcuts, View Another User's Personal Items) and Relativity Downloads (Viewer Installation Kit, Relativity Desktop Client (32-bit), Relativity Desktop Client (64-bit)).

See the Admin guide for more information on Workspace details.

2.2.2 Search indexes

Use the Search Indexes tab to create and edit Lucene Search, dtSearch and Analytics indexes.

The Lucene Search option provides you with a way to search on extracted text fields stored in Data Grid for any Data Grid-enabled workspaces in your Relativity environment. Once you enable Lucene Search, the Lucene Search option is available in the search drop-down, along with your Keyword Search, dtSearch, and Analytics indexes. You can access Lucene Search from the Documents folder, Field tree browser, Saved Searches browser, and Clusters browser within the New UI. Lucene Search syntax includes single-term search, exact phrase search, wildcards, fuzziness, proximity, Boolean operators, and grouping.

See the Admin guide for more information on search indexes.

See the Recipes section of the documentation site for more detailed steps in updating the index to look for certain symbols and special characters.

2.2.3 Fields

Fields store object information, document metadata, and coding choices within Relativity. You can use fields to display metadata on views and layouts. You can also use fields to create associations between different objects in Relativity.

When creating fields, remember you can edit many aspects of a field; however, after you first save a field, the type is locked in and cannot be changed. As a result, we recommend that you be deliberate in choosing the type for your fields.

Documents Workspace Admin Custodians Processing Indexing & Analytics Imaging & OCR Scripts Search Terms Reports Integration Points										
Workspace Details Search Indexes Object Type Fields Choices Layouts Views Tabs Relativity Applications Audit Migration Reports Audit Workspace Settings										
Custom Pages User Status										
New Field All Non-System Document Fields										
1 - 25 / 225 25 per page										
#		Name	Field Source	Field Type	Is Relational	Allow Sort/Tally	Allow Pivot	Relativity Applications	Keywords	Artifact ID
1	Edit	Alert		Long Text	No	No	No		kCura Template	1038073
2	Edit	All Custodians	All Custodians	Multiple Object	No	No	Yes			1039920
3	Edit	All Custodians (Script)		Long Text	No	No	No		kCura Template	1042334
4	Edit	All Paths/Locations	All Paths/Locations	Long Text	No	No	No			1039933
5	Edit	All Source Locations (Script)		Long Text	No	No	No		kCura Template	1042335
6	Edit	Analytics Index		Multiple Choice	No	Yes	No	Analytics Core		1038365
7	Edit	Attachment Document IDs	Attachment Document IDs	Long Text	No	No	No			1039935
8	Edit	Attachment List	Attachment List	Long Text	No	No	No			1037987
9	Edit	Attorney Review Comments		Long Text	No	No	No		kCura Template	1038164

See the Admin guide for more information on fields.

2.2.4 Choices

Choices are the predetermined values that you apply to single and multi-choice list fields. With the necessary permissions, you can create choices workspace fields.

Choices are created on fields that are usually part of the document object.

Note: When you click on the Choices tab, you're taken to the Choice Editor.

Documents Workspace Admin Custodians Processing Indexing & Analytics Imaging & OCR Scripts Integration Points

Workspace Details Search Indexes Object Type Fields Choices Layouts Views Tabs Relativity Applications Audit Migration Reports

Audit Workspace Settings Custom Pages User Status

Choice Editor

Select Fields

Object Type: Custodian

Field Name: Select Field

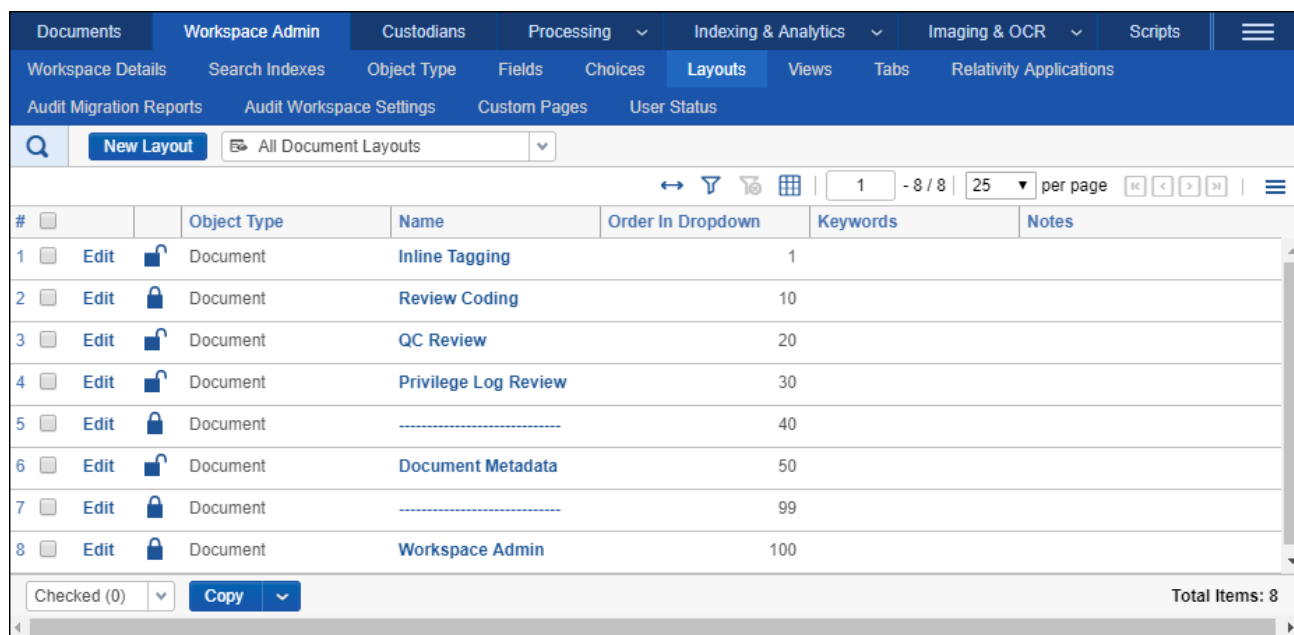
Select a Field Name to manage the choices

0 Selected Item(s)

See the Admin guide for more information on choices.

2.2.5 Layouts

The RelativityOne Quick Start template includes the following layouts that a reviewer can use to code documents with.



The screenshot shows the 'Layouts' tab in the RelativityOne interface. The top navigation bar includes 'Documents', 'Workspace Admin', 'Custodians', 'Processing', 'Indexing & Analytics', 'Imaging & OCR', and 'Scripts'. The 'Layouts' tab is selected, showing a list of document layouts. The table has columns for '#', 'Object Type', 'Name', 'Order In Dropdown', 'Keywords', and 'Notes'. There are 8 items listed, each with an 'Edit' button and a lock icon. The 'Name' column contains the layout names: 'Inline Tagging', 'Review Coding', 'QC Review', 'Privilege Log Review', 'Document Metadata', and 'Workspace Admin'. The 'Order In Dropdown' column shows values 1, 10, 20, 30, 40, 50, 99, and 100. The 'Keywords' column is empty for all items. The 'Notes' column is also empty. At the bottom, there is a 'Checked (0)' dropdown, a 'Copy' button, and a 'Total Items: 8' indicator.

#	Object Type	Name	Order In Dropdown	Keywords	Notes
1	Document	Inline Tagging	1		
2	Document	Review Coding	10		
3	Document	QC Review	20		
4	Document	Privilege Log Review	30		
5	Document	-----	40		
6	Document	Document Metadata	50		
7	Document	-----	99		
8	Document	Workspace Admin	100		

- **Inline Tagging** - an admin layout useful for selection of text in transcripts.
- **Review Coding** - meant for review purposes when assigning categories. The basic fields are updated for responsiveness and attorney comments.
- **QC Review** - contains basic review fields; this is used to provide a field confirmation for first pass review.
- **Privilege Log Review** - updates information for privilege log purposes based off of items deemed as privileged during the responsiveness review.
- **Document Metadata** - contains all of the metadata fields and is generally read only.
- **Workspace Admin** - contains all of the fields for the workspace admin.

See the Admin guide for more information on layouts.

2.2.6 Views

Views are customizable lists of items in Relativity.

Views can be edited from the drop-down list or in the Views tab. The Views tab displays some views that are used only for administrative purposes and are not visible in the main view drop-down from the Documents tab.

Documents

Workspace Admin

Custodians

Processing

Indexing & Analytics

Imaging & OCR

Scripts

Integration Points

Workspace Details

Search Indexes

Object Type

Fields

Choices

Layouts

Views

Tabs

Relativity Applications

Audit Migration Reports

Audit Workspace Settings

Custom Pages

User Status

Q

New View

All Document Views - Visible

1

- 25 / 28

25

per page

#		Name	Object Type	Order	Visible	Group Definition
1	<div>Edit</div>	<div>Duplicates Documents</div>	Document		1 Yes	
2	<div>Edit</div>	<div>Family Documents</div>	Document		1 Yes	
3	<div>Edit</div>	<div>All Documents</div>	Document		50 Yes	Family Group
4	<div>Edit</div>	<div>-----</div>	Document		60 Yes	
5	<div>Edit</div>	<div>My Batched Out Docs</div>	Document		100 Yes	Family Group
6	<div>Edit</div>	<div>My Batched Out Inclusive Emails & Attachments</div>	Document		100 Yes	Email Thread Group
7	<div>Edit</div>	<div>My Batched Out Unreviewed Docs</div>	Document		120 Yes	Family Group
8	<div>Edit</div>	<div>-----</div>	Document		190 Yes	
9	<div>Edit</div>	<div>Unreviewed Documents</div>	Document		200 Yes	Family Group
10	<div>Edit</div>	<div>Responsive Documents</div>	Document		300 Yes	

Checked (0)

Copy

Total Items: 28

See the Admin guide for more information on views.

2.2.7 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.

The lowest ordered tab will be the default tab that opens when you select the workspace. Tabs can be hidden and nested. Access to a particular object doesn't mean you have access to the corresponding tab. This means tabs can be used for security.

Documents

Workspace Admin

Custodians

Processing

Indexing & Analytics

Imaging & OCR

Integration Points

Workspace Details

Search Indexes

Object Type

Fields

Choices

Layouts

Views

Tab

Relativity Applications

Audit Migration Reports

Audit Workspace Settings

Custom Pages

User Status

New Tab

All Tabs

1

- 25 / 80

25

per page

#		Name	Tab Order	Parent
1	<div><div></div><div>Edit</div><div></div></div>	<div><div></div>Documents</div>		-1
2	<div><div></div><div>Edit</div><div></div></div>	<div><div></div>Workspace Admin</div>		0
3	<div><div></div><div>Edit</div><div></div></div>	<div><div></div>Custodians</div>		10
4	<div><div></div><div>Edit</div><div></div></div>	<div><div></div>Processing</div>		20
5	<div><div></div><div>Edit</div><div></div></div>	<div><div></div>Indexing & Analytics</div>		30
6	<div><div></div><div>Edit</div><div></div></div>	<div><div></div>Imaging & OCR</div>		40
7	<div><div></div><div>Edit</div><div></div></div>	<div><div></div>Scripts</div>		50
8	<div><div></div><div>Edit</div><div></div></div>	<div><div></div>Search Terms Reports</div>		100
9	<div><div></div><div>Edit</div><div></div></div>	<div><div></div>Reporting</div>		300
10	<div><div></div><div>Edit</div><div></div></div>	<div><div></div>Production</div>		800
11	<div><div></div><div>Edit</div><div></div></div>	<div><div></div>Case Admin</div>		1000
12	<div><div></div><div>Edit</div><div></div></div>	<div><div></div>Audit</div>		1000

Checked (0)

Delete

Total Items: 80

See the Admin guide for more information on tabs.

2.2.8 Relativity applications

The RelativityOne Quick Start template includes the following Relativity Applications.

Documents

Workspace Admin

Custodians

Processing

Indexing & Analytics

Imaging & OCR

Scripts

Search Terms Reports

Reporting

Integration Points

Workspace Details

Search Indexes

Object Type

Fields

Choices

Layouts

Views

Tabs

Relativity Applications

Audit Migration Reports

Audit Workspace Settings

Custom Pages

User Status

New Relativity Application

All Relativity Applications

Add Widget

No Dashboard Selected

Export

Keyword Search

Enter Search Terms

Search

Clear

1

- 24 / 24

25

per page

#		Name	Version	Locked	Is Dirty	System Last Modified...	System Last Modified...	System Created By	System Created On	Artifact ID
1	<div><div></div><div>Edit</div><div></div></div>	<div><div></div><div>Analytics</div></div>	9.5.278.11	Yes	No	Service Account, Relat...	09/18/2017 10:02 AM ...	Service Account, Relat...	09/15/2017 7:53 AM C...	1039735
2	<div><div></div><div>Edit</div><div></div></div>	<div><div></div><div>Analytics Core</div></div>	10.1.5.150	Yes	No	Service Account, Relat...	09/18/2017 10:02 AM ...	Service Account, Relat...	09/15/2017 7:53 AM C...	1038350
3	<div><div></div><div>Edit</div><div></div></div>	<div><div></div><div>Assisted Review</div></div>	9.5.278.11	Yes	No	Service Account, Relat...	09/18/2017 10:02 AM ...	Service Account, Relat...	09/15/2017 7:53 AM C...	1044224
4	<div><div></div><div>Edit</div><div></div></div>	<div><div></div><div>Choice Editor</div></div>	1.0.34.16	Yes	No	Service Account, Relat...	09/15/2017 7:53 AM C...	Service Account, Relat...	09/15/2017 7:53 AM C...	1039085
5	<div><div></div><div>Edit</div><div></div></div>	<div><div></div><div>Data Grid Core</div></div>	10.11.2.2	Yes	No	Service Account, Relat...	09/18/2017 10:03 AM ...	Service Account, Relat...	09/15/2017 7:53 AM C...	1045005
6	<div><div></div><div>Edit</div><div></div></div>	<div><div></div><div>Data Grid for Audit</div></div>	12.4.3.3	Yes	No	Service Account, Relat...	09/15/2017 10:50 AM ...	Service Account, Relat...	09/15/2017 7:53 AM C...	1044874
7	<div><div></div><div>Edit</div><div></div></div>	<div><div></div><div>Date Field Parsing</div></div>	0.0.0.1	Yes	No	Service Account, Relat...	09/15/2017 7:53 AM C...	Service Account, Relat...	09/15/2017 7:53 AM C...	1042541
8	<div><div></div><div>Edit</div><div></div></div>	<div><div></div><div>Document Viewer</div></div>	9.5.278.11	Yes	No	Service Account, Relat...	09/18/2017 10:01 AM ...	Service Account, Relat...	09/15/2017 7:53 AM C...	1038500
9	<div><div></div><div>Edit</div><div></div></div>	<div><div></div><div>Environment Sta...</div></div>	9.5.278.11	Yes	No	Service Account, Relat...	09/18/2017 10:03 AM ...	Service Account, Relat...	09/15/2017 7:53 AM C...	1039084

Checked (0)

Edit

Total Items: 24

- Analytics - for details, see the Analytics Guide.
- Analytics Core - for details, see the Analytics Guide.
- Assisted Review - for details, see the Assisted Review Guide.

- Choice Editor - for details, see the Admin Guide.
- Data Grid Core - for details, see the Relativity Data Grid Guide.
- Audit - for details, see the Relativity Data Grid Guide.
- Date Field Parsing - for details, see the Admin Guide.
- Document Viewer - for details, see the Admin Guide.
- Environment Statistics - for details, see the Admin Guide.
- Field Catalog - for details, see the Admin Guide.
- Imaging - for details, see the Admin Guide.
- Integration Points - for details, see the Integration Points Guide.
- Processing - for details, see the Processing User Guide.
- Processing Duplication Workflow - - for details, see the Processing User Guide.
- Lists - for details, see the Admin Guide.
- OCR - for details, see the Admin Guide.
- Production - for details, see the Admin Guide.
- Relativity Color Map - for details, see the Admin Guide.
- Relativity List Page - for details, see the Admin Guide.
- Search Terms Report - for details, see the Admin Guide.
- Set Long Text Field Size - for details, see the Admin Guide.
- Transform Set - for details, see the Admin Guide.
- Workspace Portal (Duplicate) - for details, see the Admin Guide.
- Workspace Portal (Master) - for details, see the Admin Guide.

Applications allow you to perform specialized functions in a workspace. You can configure new objects or link to existing objects for use with your application. See the developer Application Deployment System guide for more information on creating an application.

2.2.9 Audit Migration Reports

The Audit Migration Reports tab provides you with the option of generating a migration error and migration status report for you to monitor the status of audit data as you migrate it into Elasticsearch. You also have the option of running a migration error retry script.

Documents
Workspace Admin
Custodians
Processing
Indexing & Analytics
Imaging & OCR
Integration Points

Workspace Details
Search Indexes
Object Type
Fields
Choices
Layouts
Views
Tabs
Relativity Applications

Audit Migration Reports
Audit Workspace Settings
Custom Pages
User Status

Audit Admin

☒ Migration Error Report
☐ Migration Error Retry Script
☐ Migration Status Report

This Relativity script reports on all errors that have occurred while migrating audit data into the Data Grid repository.

Preview
Run

To run your script click **Run**.

See the Admin guide for more information on audit migration reports.

2.2.10 Audit Workspace Settings

Use the Audit Workspace Setting tab to configure settings specific to the Audit application. The Audit Workspace Setting tab contains two settings, DisplayAuditDataSource and HistoryTabVisibleOnUpgrade.

Documents
Workspace Admin
Custodians
Processing
Indexing & Analytics
Imaging & OCR
Integration Points

Workspace Details
Search Indexes
Object Type
Fields
Choices
Layouts
Views
Tabs
Relativity Applications

Audit Migration Reports
Audit Workspace Settings
Custom Pages
User Status

New Audit Workspace Setting
All Audit Workspace Settings
No Dashboard Selected
Export

1 - 2 / 2 | 25 per page

#		Name	Initial Va...	Value	Description	System Last Modified On
1	<input type="checkbox"/> Edit	DisplayAuditDataSource	0	1	Display Data Grid audit records in Relativity's artifact history display (0 - SQL then Data Grid post migration (auto), 1 - Data Grid, 2 - SQL (per...	09/15/2017 7:58 AM CDT
2	<input type="checkbox"/> Edit	HistoryTabVisibleOnUpgrade	False	False	Display the SQL-based History tab when upgrading the Data Grid for Audit application (False - Hidden, True - Visible)	09/15/2017 7:54 AM CDT

Checked (0)
Edit

Total Items: 2

See the Admin guide for more information on audit workspace settings.

2.2.11 User Status

You can view information about users currently logged in to Relativity from the User Status tab, which is available from within any workspace or from Home.

#	User Name	Email Address	Client Name	Web Server	Last Update	Message
1	Bachmann, David	david.bachmann@relativity.com	Relativity Template	VM-T003WEB002	09/26/2017 2:45:14...	

Checked (0) Send Message Total Items: 1

See the Admin guide for more information on user status.

2.3 Entities

Entities are the people or aliases who own or facilitate the data found in the data sources that you attach to processing sets and then publish to a workspace.

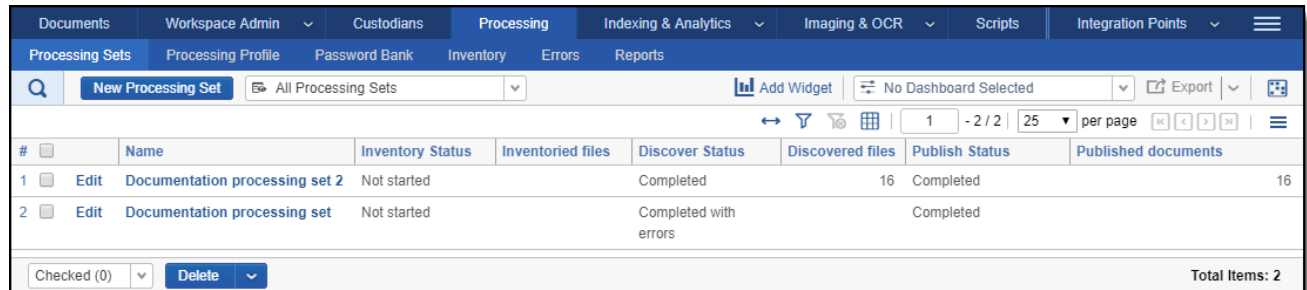
#	Full Name	Document numbering...	Notes
1	EMZ Hunt		
2	iText7		
3	iWorks		
4	MHT sample		
5	Regression		
6	September		

Checked (0) Edit

See the Admin Guide for more information on entities.

2.4 Processing

Use the Relativity's processing feature to ingest raw data directly into your workspace for eventual search, review, and production without the need for an external tool. You can use the various processing objects to create custom processing jobs that handle a wide array of information. Folders of files and PST containers will have data imported and fields linked to.



The screenshot shows the 'Processing' tab in the Relativity interface. It features a top navigation bar with tabs for Documents, Workspace Admin, Custodians, Processing (selected), Indexing & Analytics, Imaging & OCR, Scripts, and Integration Points. Below this is a sub-navigation bar with tabs for Processing Sets, Processing Profile, Password Bank, Inventory, Errors, and Reports. The main area displays a table of processing sets. The table has columns for #, Name, Inventory Status, Inventoried files, Discover Status, Discovered files, Publish Status, and Published documents. Two rows are visible: 'Documentation processing set 2' (Not started, Completed, 16 files, Completed, 16 documents) and 'Documentation processing set' (Not started, Completed with errors, Completed, 0 documents). A 'New Processing Set' button and a search bar are at the top left. A 'Delete' button and 'Total Items: 2' are at the bottom right.

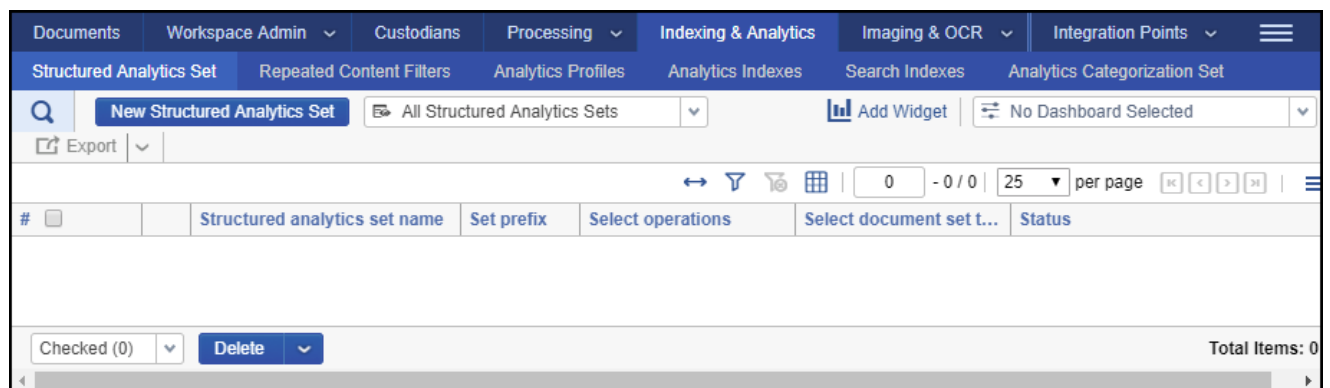
#	Name	Inventory Status	Inventoried files	Discover Status	Discovered files	Publish Status	Published documents
1	Edit Documentation processing set 2	Not started		Completed	16	Completed	16
2	Edit Documentation processing set	Not started		Completed with errors		Completed	

The Processing object contains the following tabs:

- Processing Sets - see the Processing User guide for more information.
- Processing Profiles - see the Processing User guide for more information.
- Password Bank - see the Processing User guide for more information.
- Inventory - see the Processing User guide for more information.
- Errors - see the Processing User guide for more information.
- Reports - see the Processing User guide for more information.

2.5 Indexing & Analytics

The Indexing and Analytics tab provides the following sub tabs.



The screenshot shows the 'Indexing & Analytics' tab in the Relativity interface. It features a top navigation bar with tabs for Documents, Workspace Admin, Custodians, Processing, Indexing & Analytics (selected), Imaging & OCR, and Integration Points. Below this is a sub-navigation bar with tabs for Structured Analytics Set, Repeated Content Filters, Analytics Profiles, Analytics Indexes, Search Indexes, and Analytics Categorization Set. The main area displays a table of structured analytics sets. The table has columns for #, Structured analytics set name, Set prefix, Select operations, Select document set t..., and Status. No rows are visible. A 'New Structured Analytics Set' button and a search bar are at the top left. A 'Delete' button and 'Total Items: 0' are at the bottom right.

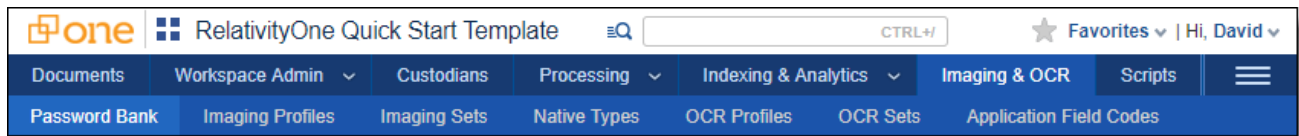
#	Structured analytics set name	Set prefix	Select operations	Select document set t...	Status
---	-------------------------------	------------	-------------------	--------------------------	--------

- Structured Analytics Sets- see the Analytics guide for more information.
- Repeated Content Filters- see the Analytics guide for more information.
- Analytics Profiles - see the Analytics guide for more information.

- Analytics Indexes - see the Analytics guide for more information.
- Search Indexes - see the Searching guide for more information.
- Analytics Categorization Set - see the Analytics guide for more information.

2.6 Imaging & OCR

The Imaging & OCR tab in the RelativityOne Quick Start template provides options for working with the following jobs:



- Password Bank - for details on the Password Bank, see the Processing User Guide.
- Imaging Profiles - for details on Imaging Profiles, see the Admin Guide.
- Imaging Sets - for details on Imaging Sets, see the Admin Guide.
- Native Sets - for details on Native Types, see the Admin Guide.
- OCR Profiles - for details on OCR Profiles, see the Admin Guide.
- OCR Sets - for details on OCR Sets, see the Admin Guide.
- Applications Field Codes - for details on Application Field Codes, see the Admin Guide.

2.7 Scripts

You can use Relativity scripts to create and execute flexible SQL-based scripts to customize and augment Relativity functionality. Scripts are Relativity artifacts. This means they have the same features as standard Relativity objects, allowing them to be secured and audited.

Documents					Workspace Admin	Custodians	Processing	Indexing & Analytics	Imaging & OCR	Scripts	Search Terms Reports	Assisted Review	
New Relativity Script					All Relativity Script								
					1 - 17 / 17 25 per page								
#			Name	Category	Description								
1	<input type="checkbox"/>	Edit	Run	01. All Custodians	Processing	This script will create a semicolon delimited list of all Custodians for an identified list of related documents in a saved search. KCD_1041105							
2	<input type="checkbox"/>	Edit	Run	02. All Source Locati...	Processing	This script will update a destination long text field with a list of semicolon delimited values from a source long text field for an identified lis...							
3	<input type="checkbox"/>	Edit	Run	03. Update Duplicate ...	Processing	This Relativity case script will repopulate the existing single-choice field with one of three values—Master, Duplicate, or Unique. This script als...							
4	<input type="checkbox"/>	Edit	Run	Assign legacy docu...	Case Functionality	This script updates Bates fields you create on the Document table with the Bates numbering information stored in the Production Information RDO of ...							
5	<input type="checkbox"/>	Edit	Run	Check Converted Do...	Case Functionality	Returns the list of documents and their types that have been previously converted							
6	<input type="checkbox"/>	Edit	Run	Create Sample Set	Case Functionality	This script provides the ability to create a random sample set of documents based on a defined sample universe.							
7	<input type="checkbox"/>	Edit	Run	Date Field Parsing	Case Functionality	This script will populate the Date Destination field with the date portion of the Date Source field and the Time Destination field with the time po...							
8	<input type="checkbox"/>	Edit	Run	Migration Error Report	Audit Admin	This Relativity script reports on all errors that have occurred while migrating audit data into the Data Grid repository.							
9	<input type="checkbox"/>	Edit	Run	Migration Error Retry...	Audit Admin	This Relativity script will resubmit audit records with errors to be migrated into the Data Grid repository.							
10	<input type="checkbox"/>	Edit	Run	Migration Status Rep...	Audit Admin	This Relativity script reports on the progress of migration of audit data into the Data Grid repository.							
Checked (0)					Copy								Total Items: 17

Relativity provides scripts as a way to manipulate or verify data. For example, a Parent date field might not be something a vendor can create from processing software; yet it's required to sort family groups by date.

To complete this task, you can use a Relativity Script named **Propagate Sent Date to Family Documents**. It takes the sent date field from emails, copies it to a parent date field, and passes the parent date field to all items of the family group.

This lets family groups remain in order during sorting. If there isn't a parent document with a sent date such as loose files, you'll need to copy another date field over to the parent date field.

Below are some example scripts you might want to add to your workspace.

Script	Description
Reviewer Statistics	Reports on the efficiency of reviewers over the specified date range. The returned statistics provide a count on how many documents were reviewed over a certain period of time.
Propagate Sent Date to Family Documents	Sets all email family documents to the same sent date as their parent documents in the case.

See the Admin guide for more information on Library scripts.

2.8 Search Terms Reports

Search terms reports provide the ability to identify documents containing specific keywords or terms . You can enter multiple terms and generate a report listing the number of hits for each term in a document.

#	Name	Index	Type	Status	Searchable set
1	Edit	RelOne Quick STR	dtSearch	Report only	All Documents

For more information on search terms reports, see the Admin guide.

2.9 Reporting

The Reporting tab in the RelativityOne Quick Start template provides the following sub-tabs.

#	Batch Set	Batch	Batch Status	Batch Unit	Assigned To
---	-----------	-------	--------------	------------	-------------

2.9.1 Review batches

The Review Batches tab in the RelativityOne Quick Start template provides users with access to batches of documents. A user can check out those batches, and begin a review on the documents they contain. See the User guide for more information on checking out batches.

2.9.2 Search terms reports

Search terms reporting provides a breakdown of document count per search item. Keyword searching is often used as a method of filtering the initial dataset. Use those terms or search parameters in the search terms report to see which documents return which terms. You can then prioritize certain groups of documents for review.

The template doesn't contain any pre-made reports. You can create a report based on terms related to your case. Remember that you need to create a dtSearch first before creating the report. See the Admin guide for more information on creating a search terms report.

2.9.3 Summary reports

Summary Reports provide aggregate tallies of field values. These reports are based on an optional grouping criteria and the fields to be tallied. Your workspace contains one default summary report called **Coding by Custodian**.

This summary report provides a basic tally of a familiar field and common review task. Click the **Edit** button in the summary information screen to view its settings:

Summary Report	Fields
Designations by Custodian	Group By: Custodian Report on Subfolders: Yes Columns: -Designation: Non Responsive -Designation: (not set) -Designation: Not Sure -Designation: Responsive -Designation: Privilege

You can edit the settings of this, and any additional summary report you create, at any time during the review process.

2.9.4 Pivot profiles

Pivot Profiles allow you to create, save, and edit custom Pivot settings. You can then apply these Pivot profile settings while using Pivot in the data set. See the Admin guide for more information on Pivot profiles.

By default, the RelativityOne Quick Start template includes the following pivot profiles:

- **Tally of File Types** - returns a grid of the types of files in the workspace
 - Group By... Relativity Native Type
 - Pivot On... <Total Only>
- **Issues Related to Custodians** - returns a pie chart of issue by custodian
 - Group By... Custodian - Single Choice
 - Pivot On... Issue Designation
- **Issues Timeline** - returns a grid of dates and how many issues fall within those dates
 - Group By... Sort Date
 - Pivot On... Issue Designation

- **File Types Related to Custodians** - returns a pie chart of file types by custodian
 - Group By... Custodian - Single Choice
 - Pivot On... Relativity Native Type

2.9.5 Domains

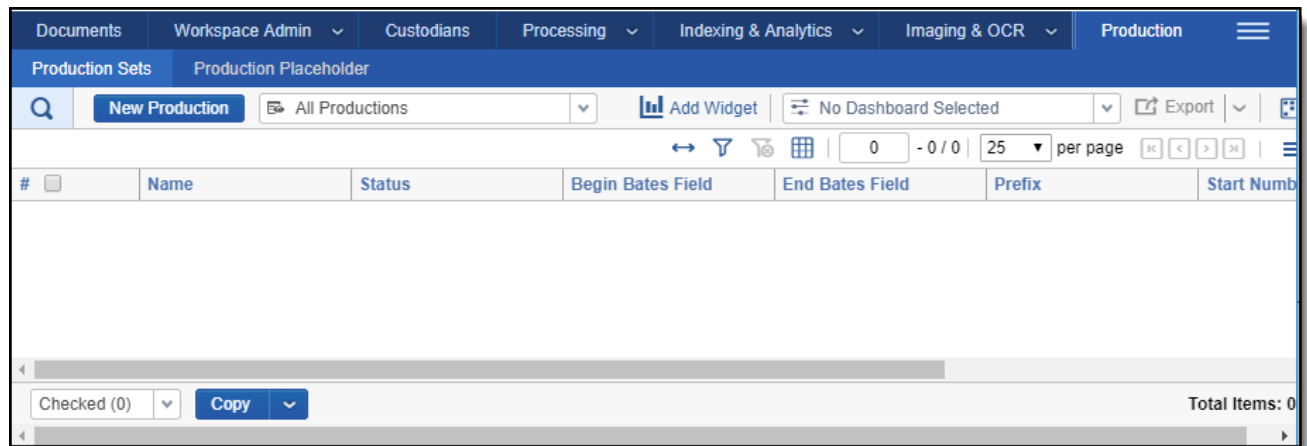
Use the Domains tab to create a new domain. Use the Domains tab to:

- Find domains that might contain privileged information such as law firms and assign accordingly
- Assign lower priority to spam email and personal email addresses; bulk code or assign to entry level reviewers
- Prioritize emails from key domains
- Utilize Author and Recipient domains with Pivot to determine conversation relationships

After domain parsing is complete you'll see a tab with a list of the domains. Click on a domain to bring up the list of documents associated with the domain. This can be useful for a number of different workflows.

2.10 Production

The Production tab in the RelativityOne Quick Start template provides the following sub-tabs.



2.10.1 Production sets

When you want to produce documents in a case workspace, you can create a production set that defines the markup set for redactions, the document numbering, the appearance of the numbering, and other settings. Relativity uses these settings when running the production. You can then view the produced images in the Core Reviewer Interface by selecting Production mode and the production set.

See the Admin guide for more information on adding a production set.

2.10.2 Production placeholder

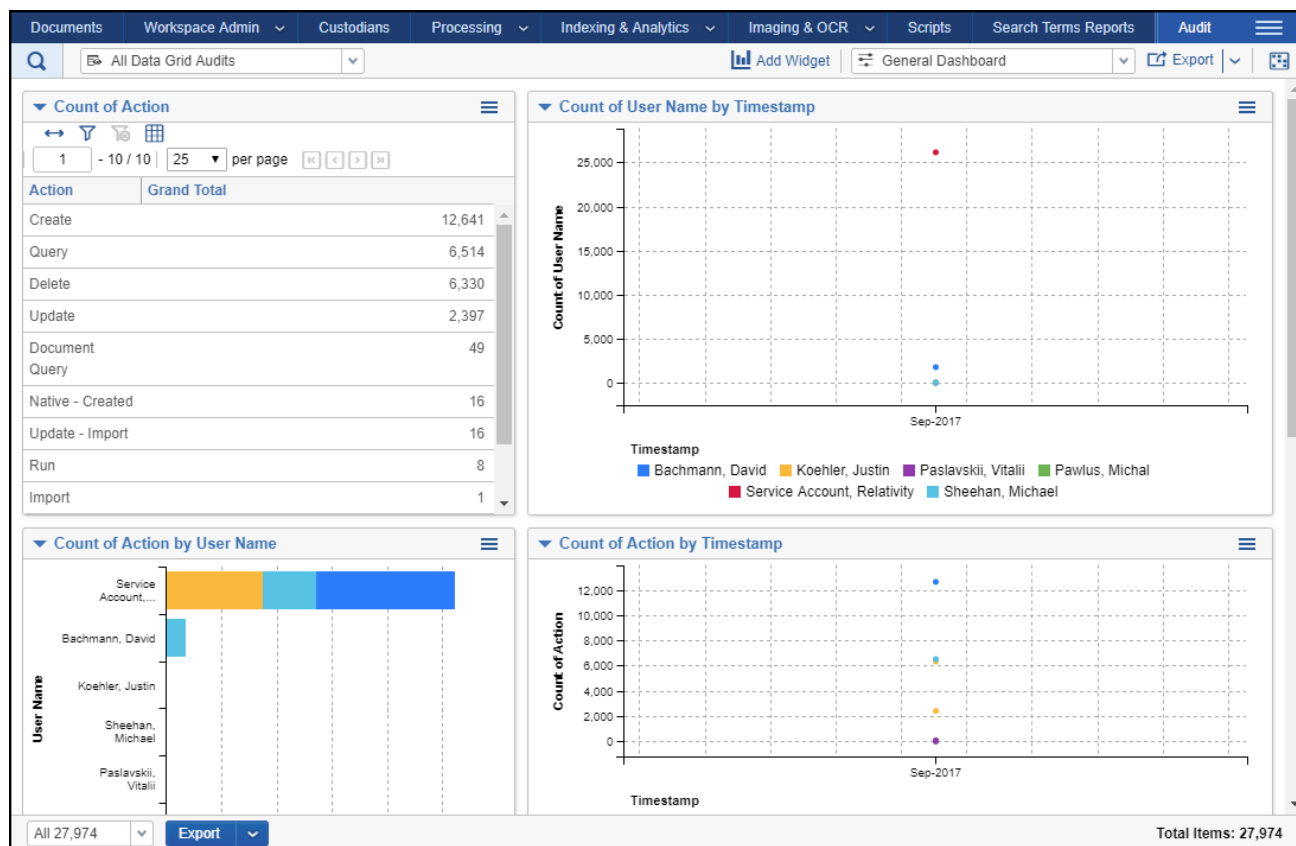
You can create your own unique placeholders for productions using images or custom text. Once you create the placeholders, you can attach the placeholders to the production data source. You can also

produce the same document in multiple productions with different placeholders. The Production Placeholder library automatically includes a default image placeholder.

See the Admin guide for more information on production placeholders.

2.11 Audit

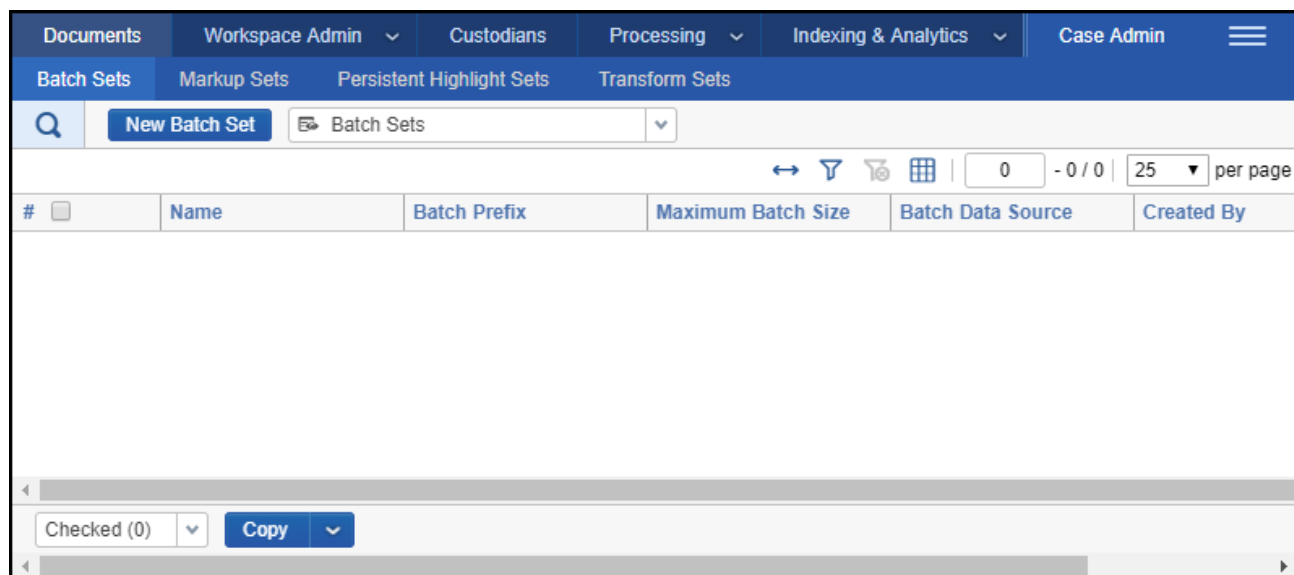
Use the Audit application to monitor and run reports on audited user activity. Audit provides insight into review planning for productivity analysis and enables you to easily find reviewer or propagation coding values for follow-up action. In the Audit application, you can add widgets for custom visualization of audit data, as well as custom dashboards.



For more information, see the Relativity Data Grid guide.

2.12 Case admin

The Case Admin tab in the RelativityOne Quick Start template provides options for working with the following admin functions: Batch Sets, Markup Sets, Persistent Highlight Sets, Production Sets, Scripts, and Transform Sets.



2.12.1 Batch sets

Batching is a useful way to secure which documents a user is able to view. Batches can also help in creating a workflow. However, batches don't carry over with the template. As a result, you need to create new batches for each workspace. The template contains views setup to work with batches.

My Checked-Out Batches and **My Checked-Out Batches Not Reviewed** are views setup for first-level reviewers to view only their assigned documents or documents they have checked out.

Before you batch documents, you need to create a batch source. The batch source is a saved search containing documents to batch. You can then create a batch based on a specified parameter of these documents. Batches might be based on:

- Custodians
- Entities
- Clusters
- Time Periods

Securing a batch set applies security only to the batches themselves, not to their included documents. See the Admin guide for more information on adding batch sets and batches.

2.12.2 Markup sets

Markup sets are securable sets of highlights and redactions. Reviewers use markup sets to apply highlights and redactions to documents in the Viewer. See the Admin guide for more information on Markup sets.

2.12.3 Persistent highlight sets

Persistent Highlight Sets are reusable, transferable sets of persistent highlight parameters. You can select Persistent Highlight Sets in the Viewer to assist in document review. See the Admin guide for more information on Persistent highlight sets.

2.12.4 Transform sets

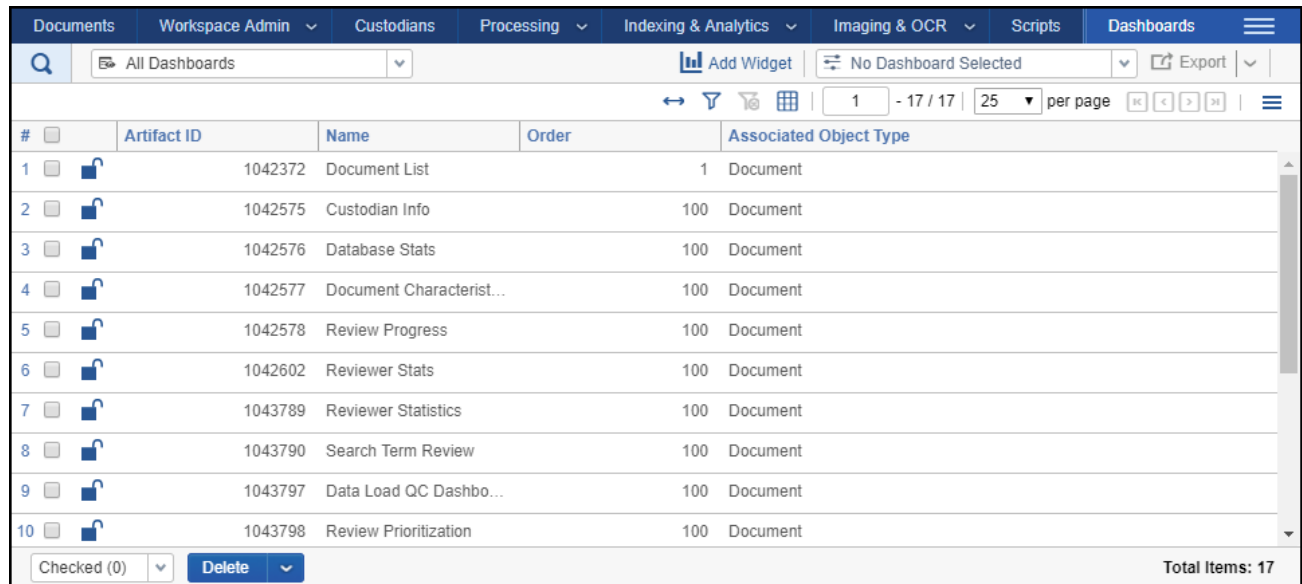
Transform Sets read through selected fields in a workspace, perform a defined process, and writes the output to other fields or object types. You can create a new transform set in your workspace that pulls from a source field and populate a destination field with the results. In Relativity, the transform set handlers are:

- Domain Parsing - takes field with email addresses, strips out the domain information, and writes it to a new field. For example, the address yourname@relativity.com becomes relativity.com.
- Conversation Index Parsing extracts the first 44 characters of an email thread conversation index to create a relational field with the same number.

See the Admin guide for more information on Transform sets.

2.13 Dashboards

When you've created a page configuration you'd like to preserve, you can create a customized dashboard. You can save multiple dashboards to quickly change the page configuration. The item list and any widgets on the dashboard will update automatically in response to filtering or searching.



The screenshot shows the 'Dashboards' tab in the Relativity application. At the top, there's a navigation bar with tabs: Documents, Workspace Admin, Custodians, Processing, Indexing & Analytics, Imaging & OCR, Scripts, and Dashboards. Below the navigation bar, there's a search bar with 'All Dashboards' selected. To the right of the search bar, there's an 'Add Widget' button and a dropdown menu showing 'No Dashboard Selected'. Below these, there's a table with 10 rows of dashboard information. The table has columns: #, Artifact ID, Name, Order, and Associated Object Type. The rows are numbered 1 through 10. At the bottom of the table, there's a 'Checked (0)' button and a 'Delete' button. On the far right, it says 'Total Items: 17'.

#	Artifact ID	Name	Order	Associated Object Type
1	1042372	Document List	1	Document
2	1042575	Custodian Info	100	Document
3	1042576	Database Stats	100	Document
4	1042577	Document Characterist...	100	Document
5	1042578	Review Progress	100	Document
6	1042602	Reviewer Stats	100	Document
7	1043789	Reviewer Statistics	100	Document
8	1043790	Search Term Review	100	Document
9	1043797	Data Load QC Dashbo...	100	Document
10	1043798	Review Prioritization	100	Document

For more information on dashboards, see the Admin guide.

2.14 Processing Duplication Workflow

The Processing Duplication Workflow is a Relativity application that identifies master and duplicate documents, all custodians, and all source files for documents. It also provides capabilities to identify unique, master and duplicate files based on a relational field.

Documents
Workspace Admin
Custodians
Processing Duplication Workflow

Processing Scripts

Processing

☒ 01. All Custodians
☐ 02. All Source Locations
☐ 03. Update Duplicate Status

This script will create a semicolon delimited list of all Custodians for an identified list of related documents in a saved search.
KCD_1041105

Inputs


Saved Search:

Relational Identifier:

Custodian:

Custodian Field:

Destination (output):

 To run your script click **Run**.

2.15 Integration Points

Integration Points offers a solution to configure integrations from third party systems to Relativity objects, as well as to move data from one workspace to another. Integration Points provides you with the ability to import and export data directly from your workspace through the same functionality that the Relativity Desktop Client (RDC) provides for importing and exporting the document object.

Documents
Workspace Admin
Custodians
Processing
Indexing & Analytics
Imaging & OCR
Integration Points

Integration Points
Job History
Job History Errors
Destination Workspaces
Integration Point Profile

- 0 / 0 | 25 per page

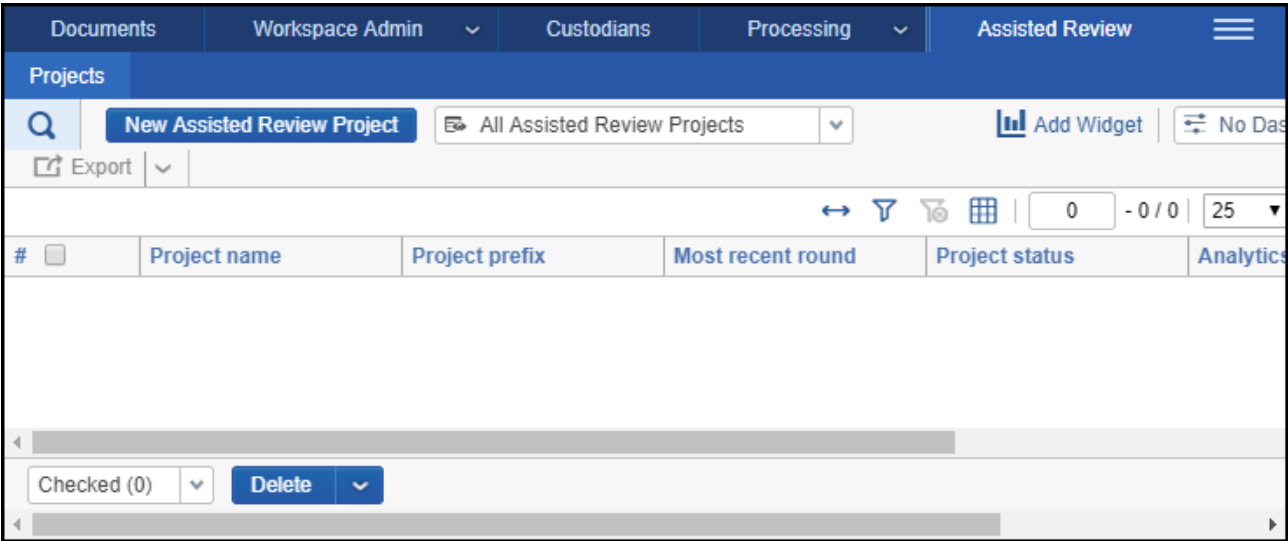
#	Name	Type	Source Provider	Destination Provider	Enable Scheduler	Has Errors
<input type="button" value="Checked (0)"/> <input type="button" value="Delete"/> Total Items: 0						

The Integration Points tab provides the following sub-tabs:

- Integration Points - for details on the Password Bank, see the Integration Points Guide.
- Job History - for details on Job History, see the Integration Points Guide.
- Job History Errors- for details on Job History Errors, see the Integration Points Guide.
- Destination Workspaces - for details on Destination Workspaces, see the Integration Points Guide.
- Integration Point Profile - for details on Integration Point Profiles, see the Integration Points Guide.

2.16 Assisted Review

Relativity Assisted Review (RAR) is a feature of Relativity that uses a search technology called categorization to teach Relativity how to determine whether a document is responsive or non-responsive, as well as what issues apply to that document.



For more information, see the Analytics guide.

3 Importing and setup

Loading data is one of the first and most important parts of the system admin role. Performing this incorrectly can negatively impact subsequent processes and complicate document review.

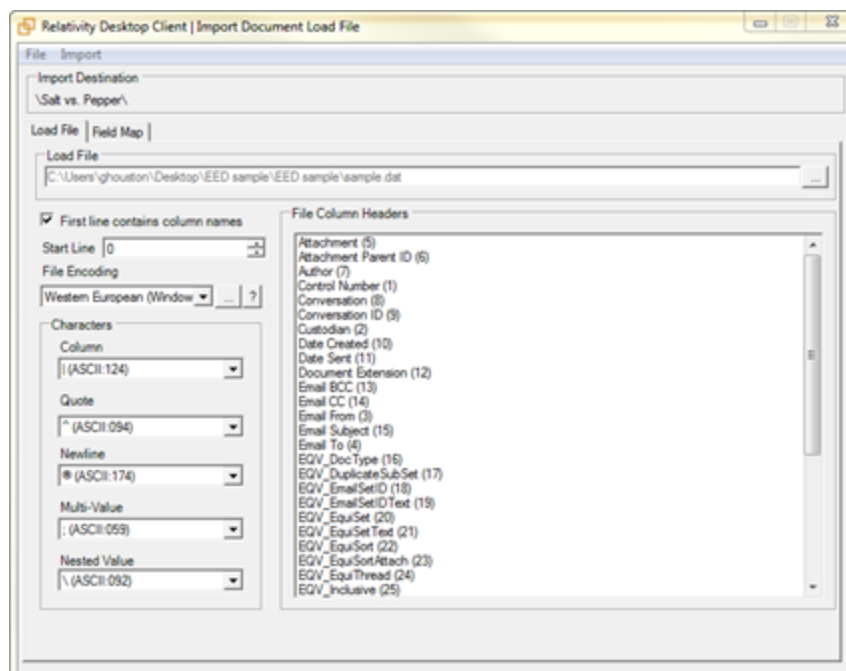
The RelativityOne Quick Start template is built with a strong core group of fields but may not contain every field your case might need.

All importing functionality is handled by the Desktop Client. You can download this utility from the Workspace details tab in Relativity.

3.1 Fields

To begin the loading process, first check to see that you have fields created for all of your data. Relativity offers a variety of field options. Determining the most appropriate field type for your data makes your database more intuitive and efficient. See the Admin guide for more information on the Relativity Desktop Client.

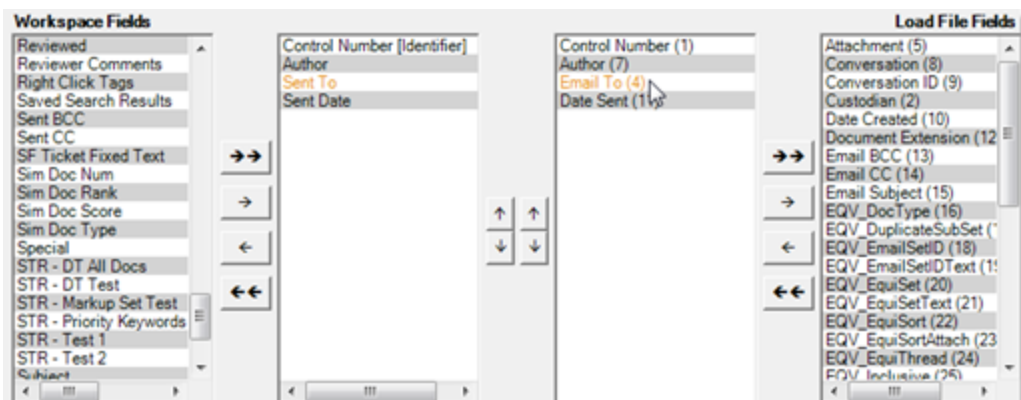
After you select your load file, you can change the delimiters on the left. The first row of your load file appears in the window to the right. If all delimiters are set with the correct specifications, then all the field names should appear in one column.



Click on the **Field Map** tab to line up your fields to load.

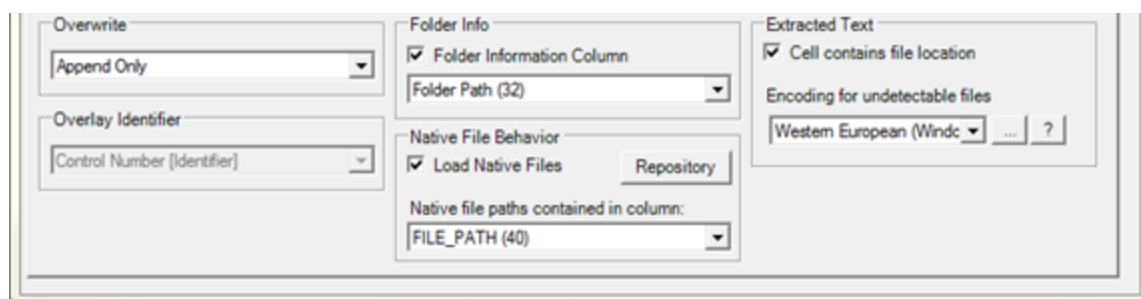
- The most important field is a unique identifier field. The RelativityOne Quick Start template uses the Beg Doc ID field.
- The identifier field must be unique for each record and is required as a part of every load or overlay.
- After creating a field you can change its name and other properties, but you can't change its type.

- Load file field names do not have to match database field name. You can load a field named Control Number into the template Beg Doc ID field. Likewise, Email BCC field might be named BCC in the load file.

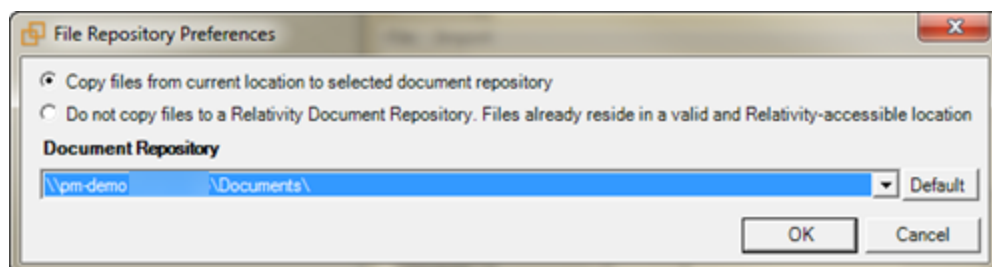


You can choose to append new data or overlay data on already existing records by changing the settings below the field lists. If you overlay records, you must select the identifying field for the overlay. It can be any fixed-length text field that is indexed. However, the best method for overlaying data is to use the unique identifier field.

You enter the browser folder information and native file paths separately. Select the check box next to the fields to indicate that you have data to load for a folder and file path, then choose the appropriate fields. The folder path is the location within the folder hierarchy that the document appears in Relativity. The file path connects the viewer to the native file.



The Advanced button under Native File Behavior copied the native files from a disk or link to files already on a image server.



The extracted text option is where you indicate that the extracted text is available in a separate file. Only a file path is needed if this is checked. If this isn't checked the extracted text data is expected in the load file.

If errors occur, the Desktop Client produces an error file listing all problematic records, and no part of those records is loaded into Relativity. After the initial load is complete, click **OK** to save the error files, if needed. Edit the error file and then try to load the records again. See the Relativity Desktop Client guide for a list of errors and fixes. Because Relativity creates a separate file of only records with errors and doesn't load them, you can edit the error load file instead of the large and sometimes cumbersome original load file.

Things to remember:

- At this point you can still create and add fields. If you find one in the load file that was missed in the database, go ahead and open Relativity and add a field or edit a field to match the data to load. Go to the File menu and select Refresh to see the field in the Relativity Desktop Client list. The new field appears at the bottom of the field list; it is not placed alphabetically.
- The Document Identifier must be unique. Only the first occurrence is loaded if there are duplicates in your load file. Choose Overlay to add more data to existing records. The Overlay must have the Document Identifier with the new data.
- You cannot change the field type for fields already created. You need to rename the current field and make a new one with the required field type.
- Not all fields need to be loaded. Leave the fields you don't want loaded in the outside column.
- Don't start the load process while creating fields. Be sure to only create fields before or after loading data.
- Fixed Length text fields should not be greater than 500 characters, larger field sizes might affect database performance.
- Be sure you have permissions to load to the selected folder.
- When overlaying a multi-choice field the previous content of the record is overwritten not merged with new data.
- If for any reason a record is not able to be loaded the entire record is skipped. A record is never partially loaded.

3.2 Field list

Below is a breakdown of the fields found in the RelativityOne Quick Start template workspace, including type and a description. Fields can be added at anytime during the case but this standard set of fields should provide a solid foundation for your database. There are other fields visible in the case; however, those fields won't be populated until a later time. These are system fields or fields dependent on tasks that occur as you begin using the database.

Note: Family group is all items that are physically or electronically attached. A fax cover sheet and documents sent are a family group as well as an email and its attachments. The parent item is the email and the child items are the attachments to the email.

3.2.1 Extracted metadata fields

The following tables list document metadata fields included in the RelativityOne Quick Start template. These lists don't include the system-level fields.

Extracted metadata fields accommodate document extracted text.

Field Name	Type	Description	Group By	Pivot
All Custodians	Multi-Object	All custodians (deduped and original) associated with a file (available only when Global Deduplication is enabled and duplicates are present).		
All Path-s/Locations	Multi-Object	All path fields (deduped and original) associated with a file (available only when Global Deduplication is enabled and duplicates are present).		
Attachment Name	Long Text	Lists the file name(s) of each attachment to an email message, separated by semicolons, extracted from metadata. Only present on parent items		
Categories	Multi-Choice	Category field extracted from the metadata of the file by processing vendor	Y	Y
Control Num Beg Attach	Fixed Length: 60	Document ID of first document page of family group ***for imaged documents		
Control Num End Attach	Fixed Length: 60	Document ID of last page of family group *** for imaged documents		
Control Num End	Fixed Length: 60	Document ID end number for scanned/TIFFed documents based on page level numbering		
Control Number	Fixed Length: 60	Document ID beginning number for scanned/TIFFed documents based on page-level numbering		
Created Date	Long Text	The date on which a file was created.		
Created Time	Long Text	The time at which a file was created.		
Custodian	Single Choice	User-assigned custodian passed to metadata extraction software or manually associated with scanned documents		Y
Date Created	Date	Date and time from the Date Created property extracted by the metadata extraction software from the original file		
Date Last Modified	Date	Date from the Modified property of a document, representing the date and time that changes to the document were last saved		
Date Received	Date	Date and time an email message was received (according to original time zones)		

Field Name	Type	Description	Group By	Pivot
Date Sent	Date	Date and time an email message (according to original time zones) was sent		Y
Delivery Receipt	Yes/No	Created by the email application if the email author turned on the delivery receipt request notification. The value is either (True) or (False) depending on whether the email was registered as delivered to a recipient.		
Document Extension	Fixed Length: 60	Three-character extension of document that represents the file type to Windows Operating System created by metadata extraction software.		Y
Document Title	Long Text	The title of a non-email document. This is blank if there is no value available.		
Email BCC	Long Text	Recipients of blind carbon copies of email messages		
Email CC	Long Text	Recipients of carbon copies of email messages		
Email Created Date/Time	Date	The date and time at which an email was created.		
Email Entry ID	Long Text	The unique Identifier of an email in an mail store.		
Email From	Fixed Length: 320	Author of the email message extracted by metadata extraction software	Y	Y
Email Has Attachments	Yes/No	The yes/no indicator of whether an email has children (attachments).		
Email Folder ID	Long Text	The folder path in which a custodian stored an email.		
Email Format	Single Chocie	The indicator of whether an email is HTML, Rich Text, or Plain Text.		
Email Last Modified Date/Time	Date	The date and time at which an email was last modified.		
Email Modified Flag	Yes/No	The yes/no indicator of whether an email was modified.		
Email Sent Flag	Yes/No	The yes/no indicator of whether an email was sent, versus saved as a draft.		
Email Subject	Fixed Length: 255	Subject of the email message extracted by metadata extraction software		
Email To	Long Text	Recipients of email message extracted from email file by metadata extraction software	Y	Y

Field Name	Type	Description	Group By	Pivot
Embedded Data Info	Fixed Length: 400	Message indicating that there are tracked changes, hidden fields or data present in native file. Can be changed to HTML field in Relativity to provide warning to reviewers to check native file for data not available in viewer.		
Excel Hidden Columns	Yes/No	The yes/no indicator of whether an Excel file contains one or more hidden columns.		
Excel Hidden Rows	Yes/No	The yes/no indicator of whether an Excel file contains one or more hidden rows.		
Excel Hidden Worksheets	Yes/No	The yes/no indicator of whether an Excel file contains one or more hidden worksheets.		
Excel Pivot Tables	Yes/No	The yes/no indicator of whether an Excel file contains pivot tables.		
Exceptions	Yes/No	"Y" for documents with issues while processing or exceptions that occurred during metadata extraction		
Extracted Text	Long Text	The full, unformatted content of the document obtained either by extracting from electronic file or by OCR processing of scanned images		
File Name	255	File name of the native file extracted as metadata		
File Path	Fixed Length: 255	The full path or relative path to the location of the physical file to be viewed in Relativity		
Filesize	Whole Number	Size of the native file in bytes		
Folder Path	Fixed Length: 255	Path of original file not including file name. This may be the file hierarchy on the system.		
Header	Long Text	Contents of the email message header extracted from metadata		
Image Taken Date/Time	Date	The date and time at which an original image was taken.		
Is Embedded	Yes/No	The yes/no indicator of whether a file is embedded in a Microsoft Office document.		
Is Parent	Yes/No	The yes/no indicator of whether a file is not a child.		
Keywords	Long Text	Keywords field extracted from the metadata of the native file		
Last Accessed	Date	The date on which a loose file was last accessed.		

Field Name	Type	Description	Group By	Pivot
Date				
Last Modified Date	Date	The date on which changes to a file were last saved.		
Last Modified Time	Long Text	The time at which changes to a file were last saved.		
Last Printed Date	Date	The date on which a file was last printed.		
Last Printed Time	Long Text	The time at which a file was last printed.		
Last Saved Date	Long Text	The date on which a file was last saved.		
Last Saved Time	Long Text	The time at which a file was last saved.		
Lotus Notes Other Folders	Long Text	A semi-colon delimited listing of all non-primary folders that a Lotus Notes message or document was included.		
MD5 Hash	Fixed Length: 32	Unique identifier created for electronic file or email generated by metadata extraction software and used for deduplication. This algorithm isn't available for deduplication scanned images.		
Meeting End Date	Long Text	The date on which a meeting item in Outlook or Lotus Notes ended.		
Meeting End Time	Long Text	The time at which a meeting item in Outlook or Lotus Notes ended.		
Meeting Start Date	Long Text	The date on which a meeting item in Outlook or Lotus Notes started.		
Meeting Start Time	Long Text	The time at which a meeting item in Outlook or Lotus Notes started.		
Message Class	Single Choice	The type of item from an email client (e.g., email, contact, calendar, etc.).		
Message ID	Fixed Length: 255	Unique identifier of emails in mail stores created by software and extracted to field by software		
Number of Attachments	Whole Number	Number of attachments for a particular record. The count of the child items in the family group only appear on the parent document record.		
Organization	Fixed	Company field extracted from the metadata of the file		

Field Name	Type	Description	Group By	Pivot
	Length: 255			
Original Author Name	Fixed-Length Text	The display name of the original author of an email.		
Original Email Author	Fixed-Length Text	The email address of the original author of an email.		
Original File Extension	Fixed-Length Text	The original three (or more) character extension of the file that represents the file type to the Windows Operating System (e.g., PDF, DOC, TXT, etc.).		
Original Folder Path	Fixed Length: 255	Folder location of each native file within the hierarchy extracted by software		
Outlook Flag Status	Single Choice	The indicator of which flag, if any, an Outlook item has assigned to it (NoFlag, FlagMarked, or FlagComplete).		
Pages	Whole Number	Available for imaged documents only		
PowerPoint Hidden Slides	Yes/No	The yes/no indicator of whether a PowerPoint file contains hidden slides.		
Privilege Hits	Long Text	List of responsive privilege term hits found in the document and separated by semicolons. These terms must be provided before metadata extraction.		
Read Receipt	Yes/No	Read receipt request notification value saved within the email system and extracted from metadata		
Received Date	Date	The date on which an email message was received.		
Received Time	Long Text	The time at which an email message was received.		
Recipient Name (To)	Long Text	The name(s) of the recipient(s) of an email message.		
Review Beg Attach	Fixed Length: 60	Review ID of the first item in a family group *** created by the metadata extraction software. The same numbers for begin and end attachments repeat for all members of the family group. ***		
Review End Attach	Fixed Length: 60	Review ID of the last file in a family group*** numbered by the metadata extraction software***		

Field Name	Type	Description	Group By	Pivot
Review ID	Fixed Length: 60	Unique document-level identification number assigned by metadata extraction software. It's incremented by one per document and not based on pages.		
Review Volume	Fixed Length: 60	Review volume name		
Search Hits	Long Text	List of responsive search term hits found in document separated by semicolons. These terms must be provided before metadata extraction.		
Sender Name	Fixed-Length Text	The name of the sender of an email message.		
Sensitivity	Single Choice	Sensitivity field extracted from an email (ex: 0 = Normal; 1 = Personal; 2 = Private; 3 = Confidential)		
Sent Date	Date	The date on which an email was sent.		
Sent Time	Long Text	The time at which an email message was sent.		
Suspect File Extension	Yes/No	The yes/no indicator if whether the extension of a file does not correspond to the actual type of the file (e.g., XLS for a Word document).		
Title	Long Text	The title of the file. For emails, this is the subject line. For non-emails, this is any available title.		
Unread	Yes/No	Read status of an email indicating whether an has ever been opened. True means is has never been opened. False means it has been opened.		

3.2.2 Processing fields

The following system-created metadata fields are always populated when data is processed.

Processing Field Name	Field Type	Description
Container Extension	Fixed-Length Text	Document extension of the container file in which the document originated.
Container ID	Fixed-Length Text	Unique identifier of the container file in which the document originated. This is used to identify or group files that came from the same container.
Container Name	Fixed-Length Text	Name of the container file in which the document originated.
Control Number	Fixed-Length Text	The identifier of the document.

Processing Field Name	Field Type	Description
Custodian	Single Object	Custodian associated with (or assigned to) the processing set during processing.
Discovery Error Child Document	Long Text	The identifier of the file that contains the parent document on which the error occurred.
Extracted Text	Long Text	Complete text extracted from content of electronic files or OCR data field. This field holds the hidden comments of MS Office files.
Last Published On	Date	Date on which the document was last updated via re-publish.
Level	Whole Number	Numeric value indicating how deeply nested the document is within the family. The higher the number, the deeper the document is nested.
Originating Processing Set	Single Object	The processing set in which the document was processed.
Originating Processing Data Source	Single Object	A single object field that refers to the processing data source.
Processing Duplicate Hash	Fixed-Length Text	Identifying value of an electronic record that is used for deduplication during processing.
Processing File ID	Fixed-Length Text	Unique identifier of the document in the processing engine database.
Processing Folder Path	Long Text	The folder structure and path to the file from the original location, which is used to generate the Relativity folder browser for your documents. This field is populated every time you process documents. See the Processing user guide for more information.
Processing Errors	Multiple Object	Any associated errors that occurred on the document during processing. This field is a link to the associated Processing Errors record.
Time Zone Field	Single Object	Indicates which time zone is used to display dates and times on a document image.
Virtual Path	Long Text	Folder structure and path to file from the original location identified during processing. See the Processing user guide for more information.

3.2.3 Relativity script fields

Relativity script fields are required when using Relativity scripts.

Field Name	Type	Description	Group By	Pivot
Parent Date	Date	Date of parent document propagated to entire family group. Generally the Date Sent field is used for email and date modified field is used for documents.		Y

3.2.4 Outside source fields

These outside fields are used to accommodate data from production software.

Field Name	Type	Description	Group By	Pivot
Bates Prod Beg	Fixed Length: 60	Bates number or production number on first page of document		
Bates Prod Beg Attach	Fixed Length: 60	First Bates number or production number in family group ***		
Bates Prod End	Fixed Length: 60	Bates number or production number on last page of document		
Bates Prod End Attach	Fixed Length: 60	Last Bates number or production number of last page in family group ***		
Production Volume	Fixed Length: 60	Production volume name assigned during production and only available on documents produced		

3.2.5 User input

User input fields handle coding and production information.

Field Name	Type	Description	Group By	Pivot
Designation	Single Choice	Responsiveness of document determined by reviewers. Indicates whether document needs to be produced for a document request. Choices typically are Responsive, Non-Responsive, Privilege or Not Sure.	Y	Y
Issues	Multi-Choice	Issues for the case	Y	Y
Markup Set-Review	Fixed Length: 400	Markup Set - Review		
Privilege Description	Long Text	Explanation of privilege reason coded by reviewers		

Field Name	Type	Description	Group By	Pivot
Privilege Type	Multi-Choice	Type of privilege information in document decided by reviewer. Choices might include Attorney-Client Communication, Attorney Work Product, etc.	Y	Y
Production Create Date	Date	Date and time of production creation	Y	Y
Production Date	Date	Date a production was sent	Y	Y

3.3 Relational fields

Relativity has a Related Items pane for viewing groups of related documents. When reviewing a single document the related items pane is at the lower right corner by default. This relational information is passed to the database from the loaded data. Any fixed-length text field under 450 characters can be relational. Using the same document identifier information across documents, the database knows what items are related. Examples of relational fields are:

Field Name	Displays
Conversation ID	Email Threads
MD5 Hash	Exact duplicate items
Review Beg Attach	Family items

3.4 Propagation

Propagation makes the field information consistent across all records in a related items group. In the template no fields have been set for propagation. You might want to propagate duplicates or family groups, but remember the field must be relational.

Things to remember:

- Propagation applies to only one tier of related items. Selecting the duplicate of an item only propagates to the duplicate, not to the duplicate and the duplicate's family members.
- Propagation doesn't work when importing items through the Desktop Client.
- Propagation requires two steps:
 - Related item creation
 - Checking Propagation on the field you want to propagate

4 Security setup

The RelativityOne Quick Start template has three levels of security setup. This is only a guideline and can be edited for your environment. Typically a new set of three groups are created for each workspace and system admins copy the security from the template level groups to the unique workspace groups, mimicking the same levels as the template with minor edits.

- **Level 1** is targeted at base level reviewers who have very limited rights and primarily check out batches and edit documents.
- **Level 2** users are able to do more case setup such as create searches and batches. This level doesn't have system admin rights or case setup rights but does have rights for setting up and administering the review process.
- **Level 3** is not a full system admin, but all case loading and setup options are available. This person is responsible for loading the data and insuring layouts and views are properly created.

4.1 Security

The following table shows the security setup levels in the RelativityOne Quick Start template.

Security	Level 1	Level 2	Level 3
Workspace	View	View	View
Folder	View	Edit	Delete/Add/Edit Security
Document	Edit	Edit	Delete/Add/Edit Security/Print/Local Access (Download, Copy Text, PrintScreen)/Redact Document/Highlight Document/Add Image/Delete Image
Report	View	Delete/Add/Edit Security	Delete/Add/Edit Security
Field	View	View	Delete/Add/Edit Security/Add Field Choice by Link
Layout	View	Edit	Delete/Add/Edit Security
Production	View	Edit	Delete/Add/Edit Security
View	View	Edit	Delete/Add/Edit Security
Search Folder	View	Edit/Add/Edit Security	Delete/Add/Edit Security
Search	View	Edit/Add/Edit Security	Delete/Add/Edit Security
Choice	View	View	Delete/Add/Edit Security
Markup Set	View	Edit/Add	Delete/Add/Edit Security
Tab	View	View	Delete/Add/Edit Security

Security	Level 1	Level 2	Level 3
Batch Set	View	Edit/Add	Delete/Add/Edit Security
Batch	View	Edit/Add	Delete/Add/Edit Security
Object Type	View	View	Delete/Add/Edit Security
RelativityScript	View	View	Delete/Add/Edit Security
Search Index	View	View	Delete/Add/Edit Security
TransformSet	None	View	Delete/Add/Edit Security
Search Terms Report	None	Edit/Add	Delete/Add/Edit Security
Search TermsResult	None	Edit/Add	Delete/Add/Edit Security
WorkProduct	None	View	Delete/Add/Edit Security
Contacts	None	View	Delete/Add/Edit Security
CaseInfo	None	View	Delete/Add/Edit Security
PivotProfile	Edit	Edit/Add	Delete/Add/Edit Security
OCRProfile	View	View	Delete/Add/Edit Security
OCRSet	View	View	Delete/Add/Edit Security

4.2 Tab visibility

The following table shows the tab visibility security levels in the RelativityOne Quick Start template.

Security	Level 1	Level 2	Level 3
Documents	Yes	Yes	Yes
Markup Sets	No	No	Yes
Choices	No	No	Yes
Relativity Utilities	No	No	Yes
Batch Sets	No	Yes	Yes
Administration	No	Yes	Yes
User Status	No	Yes	Yes
Pleadings	No	Yes	Yes
Work Product	No	Yes	Yes
Workspace Details	No	No	Yes
Production Sets	No	Yes	Yes

Security	Level 1	Level 2	Level 3
Layouts	No	No	Yes
Tabs	No	No	Yes
Object Type	No	No	Yes
Scripts	No	No	Yes
Transform Sets	No	No	Yes
Contacts	No	Yes	Yes
Summary Reports	No	Yes	Yes
Fields	No	No	Yes
Views	No	No	Yes
History	No	Yes	Yes
Review Batches	Yes	Yes	Yes
Search Indexes	No	No	Yes
Search Terms Reports	No	Yes	Yes
Case Info	No	No	Yes
OCR Profiles	No	No	Yes

4.3 Browsers

The following table shows the browsers security levels in the RelativityOne Quick Start template.

Security	Level 1	Level 2	Level 3
Clusters	No	No	Yes
Folders	Yes	Yes	Yes
Advanced & Saved Searches	No	Yes	Yes
Field Tree	Yes	Yes	Yes

4.4 Mass actions

The following table shows the mass actions security levels in the RelativityOne Quick Start template.

Security	Level 1	Level 2	Level 3
Cluster	No	Yes	Yes
Mass Copy	No	Yes	Yes
Mass Delete	No	Yes	Yes
Mass Images	No	Yes	Yes
Send to Casemap	No	No	Yes
Process Transcript	No	No	Yes
Mass Edit	No	Yes	Yes
Mass Produce	No	Yes	Yes
Mass Print Image	No	Yes	Yes
Export to File	Yes	Yes	Yes
Mass Move	No	No	Yes
Mass Replace	No	Yes	Yes
Tally/Sum/Average	Yes	Yes	Yes

4.5 System admin operations

The following table shows the system admin operations security levels in the RelativityOne Quick Start template.

Security	Level 1	Level 2	Level 3
Assign Batches	No	No	Yes
View Workspace Details	No	No	No
Override Production Restrictions	No	No	Yes
Manage Object Types	No	No	Yes
View User Status	No	Yes	Yes
View All Audits	No	Yes	Yes
Use Pivot/Chart	No	Yes	Yes
View Relativity Utilities	No	No	Yes
View Batch Pane	No	Yes	Yes

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