



Document Comparison Guide

February 9, 2010

Version 5.09



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1 Overview

Welcome to the Document Comparison Guide. This document outlines the functionality of Relativity's document compare feature.

This feature compares the extracted text of two specified documents, allowing you to understand the key differences.

The compare feature is available in Relativity version 5.05 and higher.

2 Prerequisites

In order for Relativity's compare feature to function properly, the feature must be installed in your environment. Contact support@kcura.com for a detailed installation guide.

Additionally, each user of the compare feature must have a license of Microsoft Word 2007 – the technology behind the comparisons.

3 Using the Compare Feature

The compare feature is launched from a standard, securable Relativity field. Rights to this field can be granted or denied.

This field can be launched from:

- The related items pane
- A layout
- The document list

The feature's functionality varies slightly, depending on the location of the field.

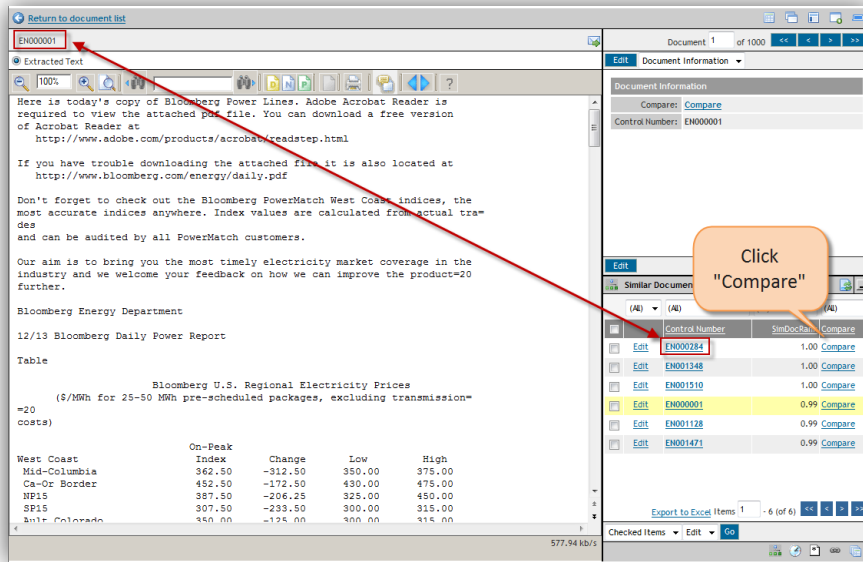
3.1 Related Items Pane

The compare field may be added to related items panes. This is particularly useful when working with groups of near duplicates, or conceptually similar documents.

Clicking the compare field of a record in the related items pane will compare that record with the active record in the viewer.

For example, in the screenshot below, EN000001 is the active record in the viewer.

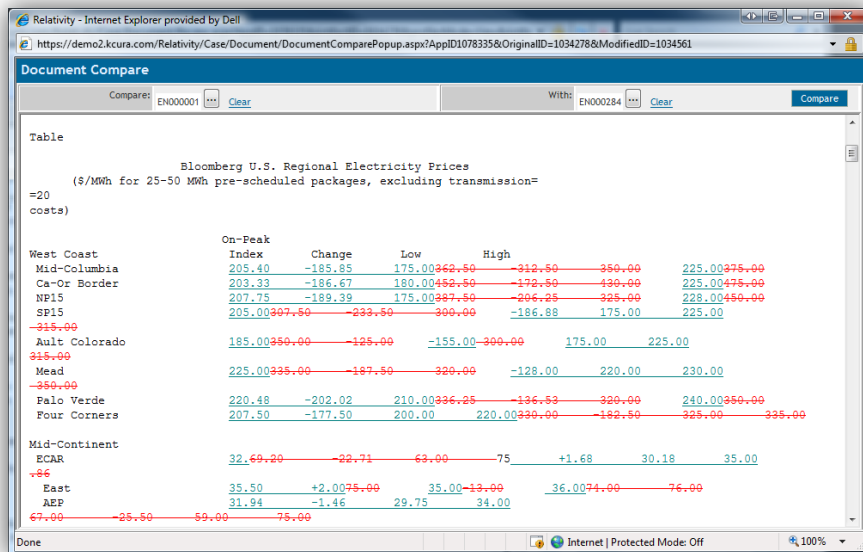
The compare field of a similar document, EN000284, is clicked.



Similar Document form

3.1.1 Comparing the documents

The above action launches the compare function, comparing the active record, EN000001, with the clicked record, EN000284.



Document Compare dialog box

The similarities and differences between the documents are color coded in the following way:

- Identical text is in **black**
- Added text is in **green**
- Deleted text is in **red**



The comparison is based on the documents' extracted text.

3.2 Layout

In addition to accessing the compare feature from the related items pane, the feature may be launched from a layout.

Coding form

Clicking the **Compare** link launches a new compare window.

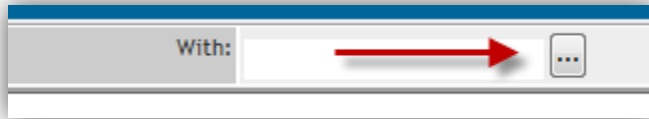
Compare textbox

The clicked document is automatically populated as the base document, found in the left box. The second document, found in the right box, is set using one of the following methods:

- The picker (accessed by clicking the ellipses)
- Shift-clicking

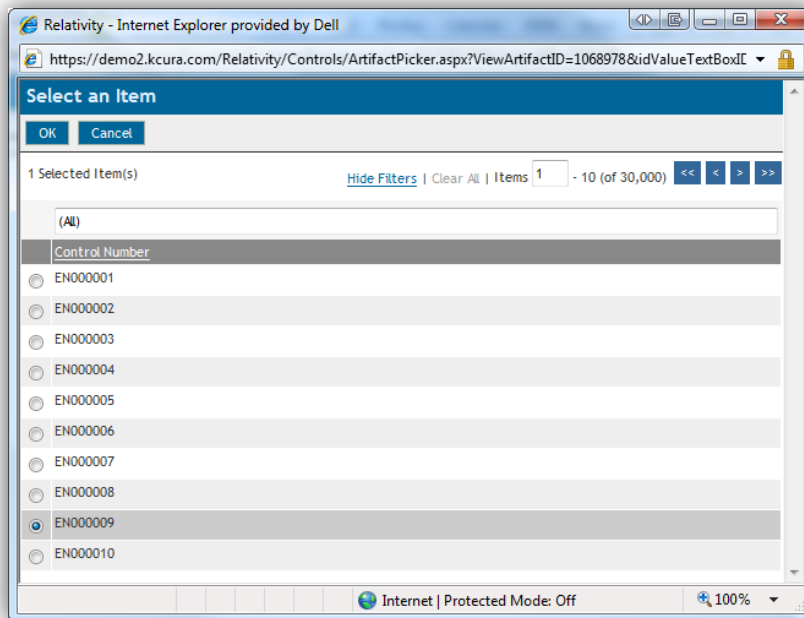
3.2.1 Selecting the second document using the picker

To select the second document using the picker, click the **ellipsis (...)** button next to the “With” textbox.



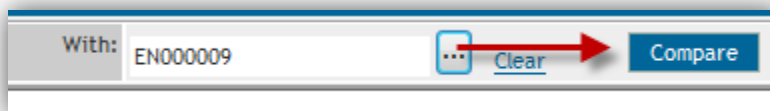
Ellipsis button

The “Select an Item” window opens. Click the radio button next to the desired document from the list and click **OK**.



Select an Item dialog box

The “Document Compare” window is refreshed. The selected document is populated in the “With” textbox. Click **Compare**.



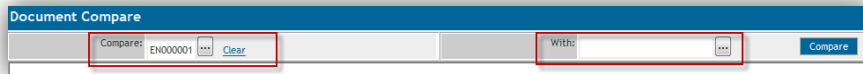
Compare button

The comparison is run, displaying in the “Document Compare” window.

3.2.2 Selecting the second document using shift-click

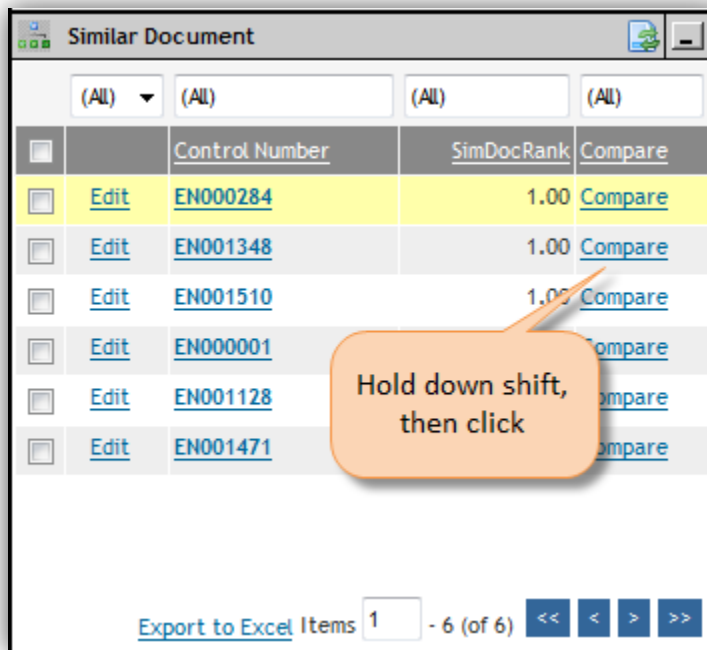
To select the second document from within the related items pane, shift-click.

With the “Document Compare” window open, move back to the core reviewer interface.



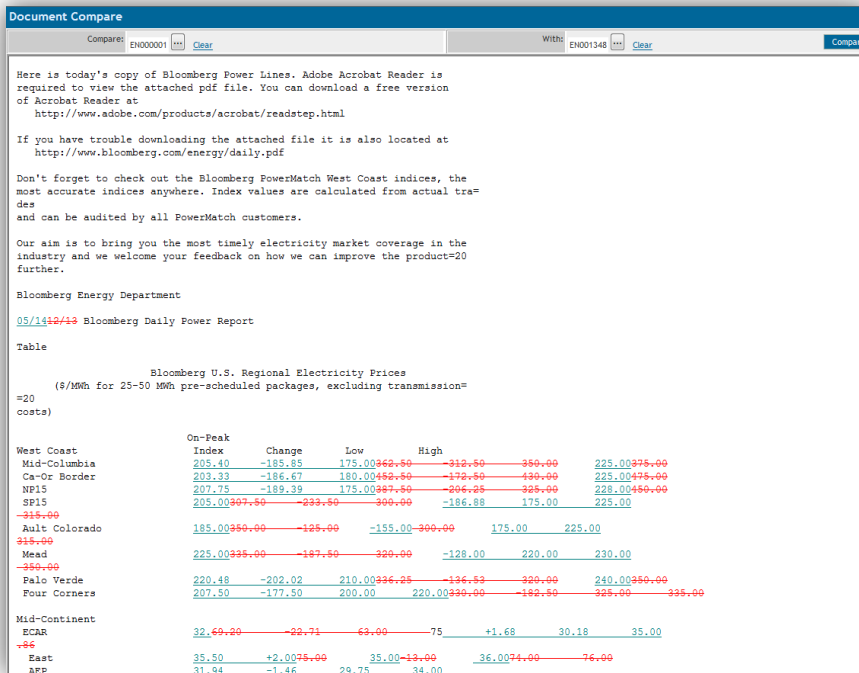
Document Compare

Find the second document to compare, hold down shift, and click the document’s **Compare** field.



Compare hyperlink

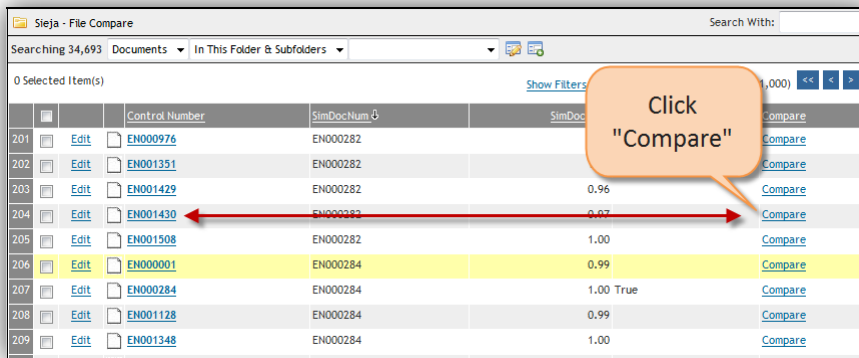
Shift-clicking **Compare** selects that document (in this instance EN000284) as the document to be compared with the active document. The compare will be automatically run.



Document Compare

3.3 Case Workspace

If the compare field is added to the view, you can click **Compare** to launch a document comparison from the document list.



Case Workspace

Clicking compare will launch a document comparison.



Compare textbox

The clicked document is automatically populated as the base document.
The second document is set using one of the following methods:

- The picker
- Shift-clicking

This works the same was as described in section 3.1.2.

4 Disclaimer

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