



# **Starter Template**

v7.3

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## Contents

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1	Overview.....	3
2	Importing and Setup.....	3
2.1	Fields .....	3
2.2	Relational Fields.....	7
2.3	Propagation .....	7
3	dtSearch Index .....	7
4	Scripts .....	8
5	Transform Sets .....	9
6	Search Terms Report .....	10
7	Batching .....	11
7.1	View Table .....	12
8	Summary Reports.....	12
8.1	Work Product Tab.....	13
9	Considerations outside of the template.....	13
10	Appendix A Data Import Formats .....	13
10.1	Processed Data .....	13
10.2	Extracted Text or OCR data .....	14
10.3	Date Fields.....	14
10.4	Image files .....	15
10.5	Field List.....	15
11	Appendix B Import Errors for Desktop Client.....	23
12	Appendix C Views .....	26
13	Work Product Tab .....	28
14	Security Setup.....	28
15	Proprietary Rights .....	31

# 1 Overview

This manual is designed to familiarize you with the Starter Template installed with Relativity. Using this template and the information provided in the following sections, you will be able to setup and customize your workspace for a standard document review.

Before going through this manual, it is highly recommended you have completed the following:

- Relativity Admin training
- Infrastructure setup
- Data processing; (refer to Appendix A as a guideline for the output.)
- Client, Matter and Workspace creation; (use the Starter Template to create your workspace.)

While all aspects of workspace setup are found in the Admin guide, use this manual to get a deeper understanding of certain caveats with case setup. Each section discusses different aspects of case setup followed by Appendices 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.

## 2 Importing and Setup

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

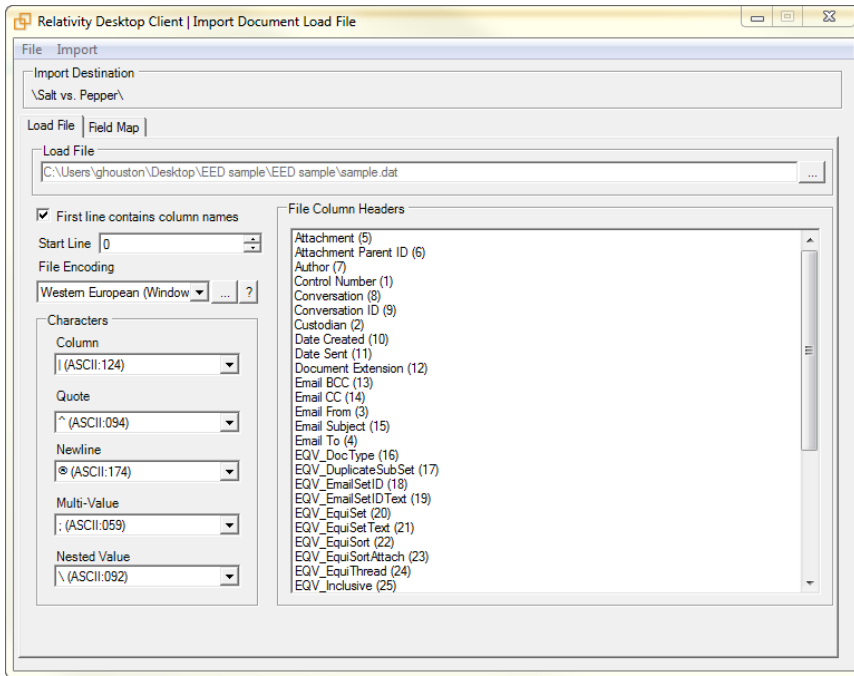
The Relativity Starter template is built with a strong core group of fields but may not contain every field your case might need.

All importing functionality is handled by the desktop client. You can download this from the Workspace details tab in Relativity.

### 2.1 Fields

Use the Relativity Desktop Client to begin the loading process by first checking 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 will make your database more intuitive and efficient.

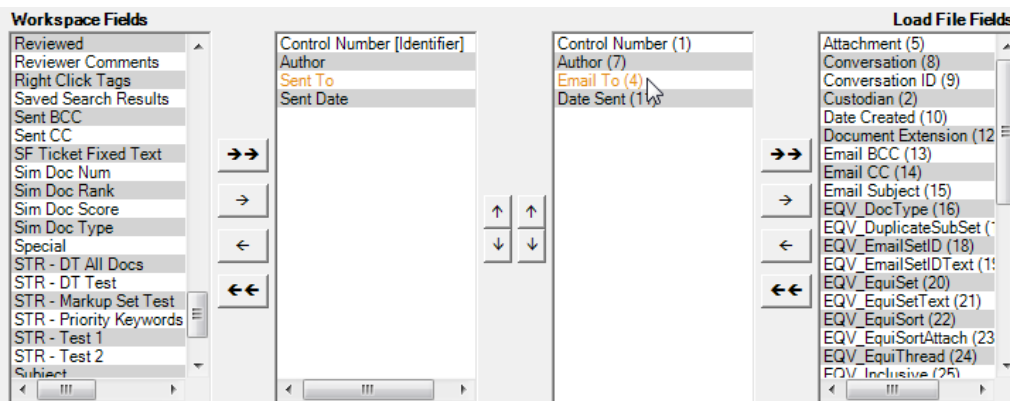
If your delimiters are all set with the correct specifications your field names should all appear in one column. Change your delimiters on the left after you select your load file. The first row of your load file will be displayed in the window to the right.



File Column Headers

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

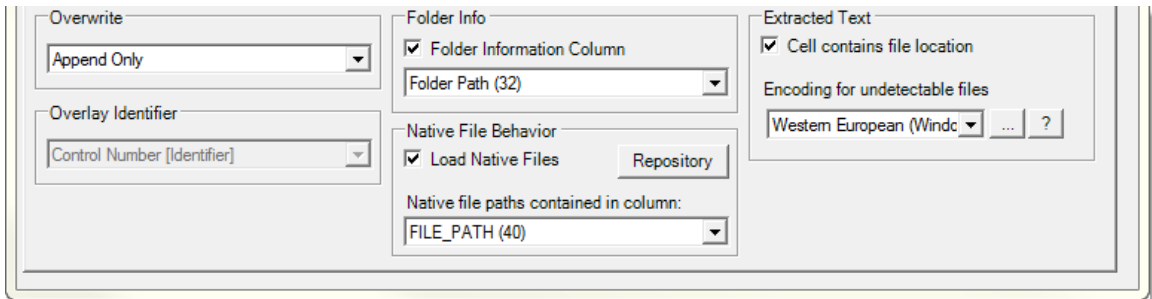
- The most important field is a unique identifier field. Our template uses the Beg Doc ID field.
- The identifier field must be unique for each record and is required as a part of every load or overlay.
- After creating a field you can change its name and other properties but you cannot change its type.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



Field Lists

You can choose to append new data or overlay data on already existing records by changing the settings below the field lists. If you are going to 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.

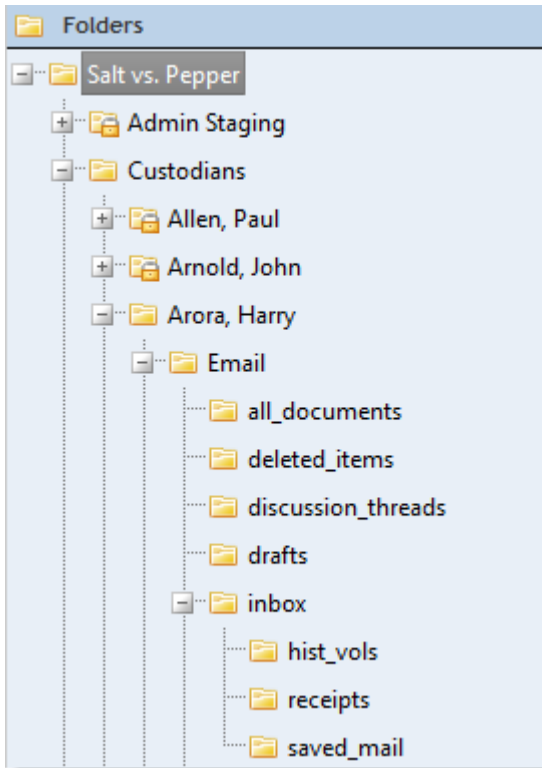
Loading the browser folder information and the link to the native file are chosen separately from the regular field list. Check the box next to the fields to indicate that you have data to load for a folder and file path. Choose the appropriate fields from the drop-down. The folder path is the hierarchy as the document appears in the browser window in Relativity. The file path connects the viewer to the native file.



The dialog box is titled "Specialized field information" and contains several sections:

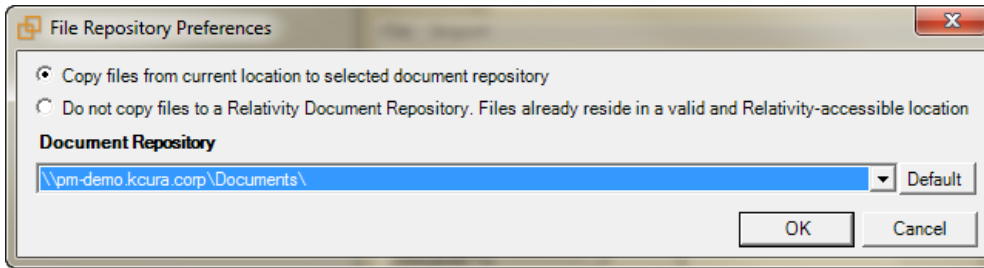
- Overwrite:** A dropdown menu set to "Append Only".
- Overlay Identifier:** A dropdown menu set to "Control Number [Identifier]".
- Folder Info:** A section with a checked box for "Folder Information Column" and a dropdown menu set to "Folder Path (32)".
- Native File Behavior:** A section with a checked box for "Load Native Files" and a "Repository" button.
- Native file paths contained in column:** A dropdown menu set to "FILE\_PATH (40)".
- Extracted Text:** A section with a checked box for "Cell contains file location" and a dropdown menu for "Encoding for undetectable files" set to "Western European (Windc)".

Specialized field information



Folder Path

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



File Repository Preferences

The extracted text option is where you indicate that the extracted text is available in a separate file. Only a file path will need to be present if this is checked. If this is not checked the extracted text data is expected in the load file.

If errors occur, the Desktop Client will produce an error file of all problematic records. Nothing from those records will be loaded. After the initial load is complete, click **OK** to save the error files, if needed. Edit the error file and then try to load it again. Appendix B has a list of errors and fixes for them. Because Relativity creates a separate file of only records with errors and does not load them you can edit the error load 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 will appear at the bottom of the field list not alphabetically.
- The Document Identifier must be unique. Only the first occurrence will get 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 will 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 will never be partially loaded.

## 2.2 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
<b>MD5 Hash</b>	Exact duplicate items
<b>Review Beg Attach</b>	Family items
<b>Conversation ID</b>	Email Threads

## 2.3 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 will only propagate to the duplicate not the duplicate and the duplicates family members.
- Propagation will not work when importing items through the desktop client.
- Propagation requires two steps:
  - Related Item creation
  - Checking Propagation on the field you want to propagate

## 3 dtSearch Index

While your database automatically creates a keyword search index, you will need to manually create and update the dtSearch index. With this index, you can perform proximity searches, stemming, and other advanced searching operations not available in Keyword Search.

Things to remember:

- If the dtSearch agent encounters a network-related error during the build process, it will execute up to three retry attempts at 20-second intervals.
- You can edit a dtSearch alphabet file directly in Relativity before building the index. The alphabet file is displayed in the lower-right corner of a dtSearch index's page and is fully editable. This will allow you to search single characters and symbols.
- You can safely estimate that any dtSearch index built will be approximately 25-30% of the size of the text you are indexing.
- If you overlay data onto existing records, you cannot use an incremental build to update your dtSearch index. This is because the dtSearch incremental build looks for new documents in the searchable set. As such, if previously indexed records are updated, they will not be re-indexed by an incremental build. A full build must be executed to add the newly overlaid data to the index.

## 4 Scripts

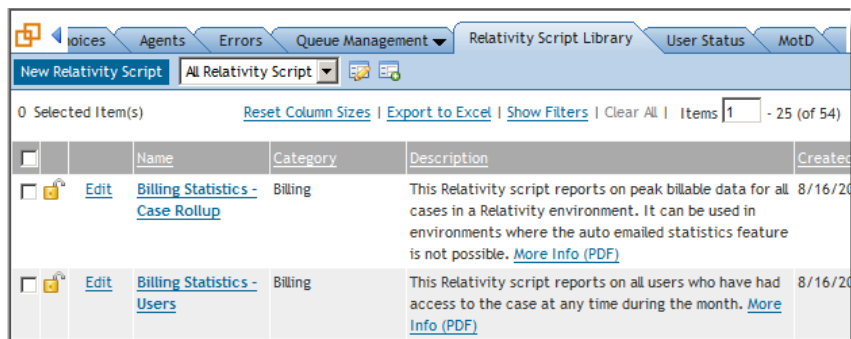
Relativity offers scripts as an option to manipulate or verify data. A Parent date field might not be something a vendor can create from processing software; yet it is extremely important when it comes time to sort family groups by date.

To complete this task 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 the parent date field to all items of the family group. This allows family groups to remain in order during sorting. If there isn't a parent document with a Sent Date such as loose files, you will 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
<b>Reviewer Statistics V2</b>	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.
<b>Propagate Sent Date to Family</b>	Sets all email families documents to the same sent date as their parent documents in the case.

## Documents



The screenshot shows the 'Relativity Script Library' interface. At the top, there are navigation tabs: 'Choices', 'Agents', 'Errors', 'Queue Management', 'Relativity Script Library', 'User Status', and 'MotD'. Below the tabs, there is a search bar with 'All Relativity Script' selected. The main area displays a table with columns for 'Name', 'Category', 'Description', and 'Created'. Two items are visible in the table:

	Name	Category	Description	Created
<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">Billing Statistics - Case Rollup</a>	Billing	This Relativity script reports on peak billable data for all cases in a Relativity environment. It can be used in environments where the auto emailed statistics feature is not possible. <a href="#">More Info (PDF)</a>	8/16/20
<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">Billing Statistics - Users</a>	Billing	This Relativity script reports on all users who have had access to the case at any time during the month. <a href="#">More Info (PDF)</a>	8/16/20

All Relativity Scripts View

## 5 Transform Sets

Transform Sets read through selected fields in a workspace, perform a defined process, and write the output of the process to other fields or object types. You can create a new transform set in your workspace that will pull from a source field and populate a destination field with the results. Current transform sets are:

- **Domain Parsing** takes field with email addresses and strips out only the domain information of the address  
[yourname@kcura.com](#) will become kcura.com.
- **Conversation Thread Index Parsing** extracts the first 44 characters of an email thread conversation index to create a relational field with the same number.

### Workflow Example:

After domain parsing is complete you will have a tab with a list of the domains. Clicking on a domain will bring up the list of documents associated from the domain. This can be useful for a number of different workflows.

<a href="#">aeglobalmarkets.com</a>
<a href="#">alerts.equityalert.com</a>
<a href="#">concureworkplace.com</a>
<a href="#">cs.com</a>
<a href="#">enron.com</a>
<a href="#">enron.net</a>
<a href="#">gulfsouthpl.com</a>
<a href="#">hotmail.com</a>
<a href="#">houston.rr.com</a>
<a href="#">intcx.com</a>
<a href="#">kindermorgan.com</a>
<a href="#">kptv.com</a>
<a href="#">lists.postmastergeneral.com</a>
<a href="#">neg.pge.com</a>
<a href="#">optinrealbig.com</a>

Use the Domains tab for:

- Find domains that might contain privileged information such as lawfirms 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

## 6 Search Terms Report

Search Terms Reporting allows you to see the breakdown of document count per search item. Often keyword searching is used as a method of filtering the initial dataset. Using those terms or search parameters in the Search Terms Report allows you to see which documents return which terms.

Knowing which documents contain which terms allows you prioritize certain groups for review. The template does not contain any pre-made

reports. Create a report based on terms related to your case. Remember you will need to create a dtSearch first before creating the report.

## 7 Batching

Batching is a useful way to secure what documents a user is able to view. Batches can also help in creating a workflow. Note, however, that batches do not carry over with the template. Therefore, you will need to create new batches for each workspace. The template does contain 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 documents they are assigned or they have checked out.

Before you batch you need to create a batch source. This is a saved search containing documents to batch. Then you can create a batch based on a particular unit within these documents. Batches might be based on:

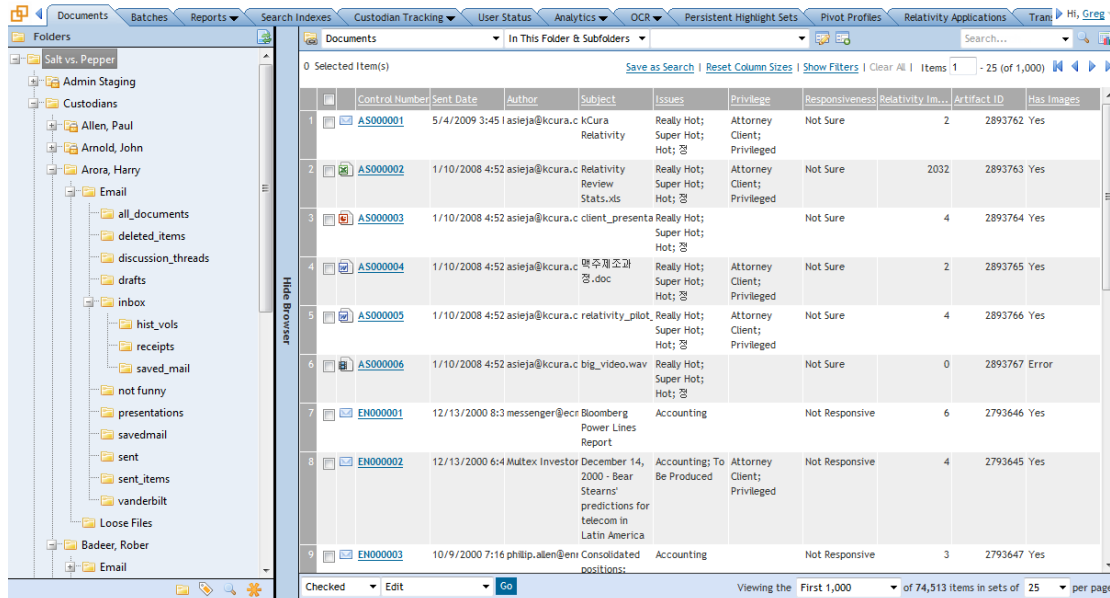
- Custodians
- Clusters
- Time Periods

Things to remember:

- Securing a batch set only applies security to the batches themselves, not their included documents.

## 7.1 View Table

Your template is equipped with a number of different views, each with its own fields and conditions.



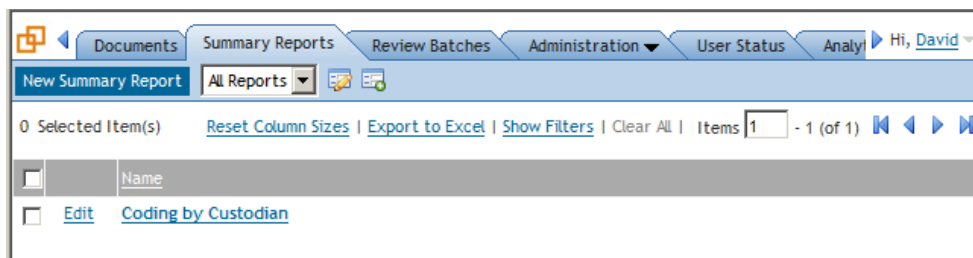
	Control Number	Sent Date	Author	Subject	Issues	Privilege	Responsiveness	Relativity Im...	Artifact ID	Has Images
1	AS000001	5/4/2009 3:45	asieja@kcura.c	kCura Relativity	Really Hot; Super Hot; Hot; ☹	Attorney Client; Privileged	Not Sure		2893762	Yes
2	AS000002	1/10/2008 4:52	asieja@kcura.c	Relativity Review Stats.xls	Really Hot; Super Hot; Hot; ☹	Attorney Client; Privileged	Not Sure	2032	2893763	Yes
3	AS000003	1/10/2008 4:52	asieja@kcura.c	client_presenta	Really Hot; Super Hot; Hot; ☹		Not Sure		2893764	Yes
4	AS000004	1/10/2008 4:52	asieja@kcura.c	명주제조과 경.doc	Really Hot; Super Hot; Hot; ☹	Attorney Client; Privileged	Not Sure		2893765	Yes
5	AS000005	1/10/2008 4:52	asieja@kcura.c	relativity_pilot	Really Hot; Super Hot; Hot; ☹	Attorney Client; Privileged	Not Sure		2893766	Yes
6	AS000006	1/10/2008 4:52	asieja@kcura.c	big_video.wav	Really Hot; Super Hot; Hot; ☹		Not Sure		2893767	Error
7	EN000001	12/13/2000 8:3	messenger@ecr	Bloomberg Power Lines Report	Accounting		Not Responsive		2793646	Yes
8	EN000002	12/13/2000 6:4	Mutex Investor	December 14, 2000 - Bear Stearns' predictions for telecom in Latin America	Accounting; To Be Produced	Attorney Client; Privileged	Not Responsive		2793645	Yes
9	EN000003	10/9/2000 7:16	philip.allen@eni	Consolidated positions:	Accounting		Not Responsive		2793647	Yes

All Views

## 8 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 is equipped with one summary report called **Designations by Custodian**.



Name
Coding by Custodian

Designations by Custodian

Because this is a workspace template, this summary report is a basic tally of a familiar field and common review task. Clicking the edit button in the summary information screen allows you to view its settings:

Summary Report	Fields
<b>Designations by Custodian</b>	<ul style="list-style-type: none"> <li>▪ Group By: Custodian</li> <li>▪ Report on Subfolders: Yes</li> <li>▪ Columns: <ul style="list-style-type: none"> <li>○ Designation: Non Responsive</li> <li>○ Designation: (not set)</li> <li>○ Designation: Not Sure</li> <li>○ Designation: Responsive</li> <li>○ Designation: Privilege</li> </ul> </li> </ul>

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

## 8.1 Work Product Tab

Relativity supports for custom objects. These datasets are created to hold data outside of the Document object. The Work Product tab allows scanned PDFs of pleadings or correspondence and associated information to be loaded into your database. You can add fields, views or layouts to this tab to customize it for your needs.

## 9 Considerations outside of the template

This document has discussed many attributes of a Relativity database that are part of the Starter template. Here are some other features that might be helpful when managing your case. Refer to the Admin manual or the Certified Admin Study guide to become more familiar with these features.

- Mark-up Sets
- Production Sets
- History Tab
- Admin Mode
- Field tree

## 10 Appendix A Data Import Formats

### 10.1 Processed Data

Some data originates from client files and needs processing to extract the metadata. This is the list of fields you will receive from your internal processing software or from your vendor. You can provide this list to your vendor to assist with their understanding of required delivery. These fields should be delivered as delimited files with the following

delimiters. The column or field names should be located in the first line of the load file.

Value	Character	ASCII Number
Column	¶	020
Quote	”	254
Newline	®	174
Multi-Value	;	059
Nested Value	\	092

```

pControl NumberpAttachmentpAttachment Parent IDpAuthorpCategorizationpCategorization F
pAMEYERS_0000001p
pAMEYERS_0000003pK Petersonp
pAMEYERS_0000004pJ Calzap
pAMEYERS_0000005pdeal 539246.1 Reliant HLP dms 7634/7636p
pAMEYERS_0000006p0.69pNon Responsive;pInfo on some cuts for 05
pAMEYERS_0000007p0.69pNon Responsive;pInfo on some cuts for 05
pAMEYERS_0000008p0.64pResponsive;pTAG #22872p
pAMEYERS_0000009pNEW PAC Numbersp
pAMEYERS_0000010pDates to Keep in mindp
pAMEYERS_0000011p0.76pResponsive;pAccomplishments and Goals 20
pAMEYERS_0000012p0.77pResponsive;pLV Cogen cut for HE 19p
pAMEYERS_0000013p0.83pNon Responsive;pCut on TAG 23841p
pAMEYERS_0000014p0.89pNon Responsive;pTAG 25883p
pAMEYERS_0000015p0.75pNon Responsive;pTAG 26235p
pAMEYERS_0000016pFrontier Unit Outage for 07/21/01p
pAMEYERS_0000017pTag #27652 & 27656p
pAMEYERS_0000018pLV COGEN for 07/21/01p

```

Sample Load file

## 10.2 Extracted Text or OCR data

The Extracted text field will hold OCR or full text metadata extracted from an email or file. Relativity accepts the data as a field in the delimited load file or as document level text files. Just include the relative or absolute path to the files if you include the data as separate load files. Remember that page level OCR is not an acceptable load format.

## 10.3 Date Fields

Relativity accepts date and time as one field. Date Sent and Time Sent should be one field. If they are shipped separately you will need to create a new field for time. Date fields can be formatted to accept only date without including the time but not the time without the date.

Dates cannot have any zero value and should be formatted in a standard date format.

## 10.4 Image files

Relativity accepts single page Group IV tiff and jpg images from outside sources. Load these using an Opticon formatted load file. This text file will reference the Control ID on a page level. The first page should match up to any data you intend to load.

Imported images not in the supported formats must be converted using a third-party conversion tool before they can be upload successfully.

## 10.5 Field List

Below is a breakdown of the fields found in the kCura template workspace, including their 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 will not be populated until a later time. These are system fields or fields dependent on tasks that will occur as you begin using the database.

### Extracted Metadata Fields

Field Name	Type	Description	Group By	Pivot
<b>Attachment Document IDs</b>	Long Text	Attachment Doc IDs of all child items in family group ***, delimited by semi-colon, only present on parent items		
<b>Attachment Name</b>	Long Text	Lists the file name(s) of each attachment to an e-mail message, separated by semi-colons, extracted from metadata. Only present on parent items		
<b>Author</b>	Fixed Length: 320	Author field extracted from the metadata of document by metadata extraction software. This field will be empty for emails.	Y	
<b>Categories</b>	Multi-Choice	Category field extracted from the metadata of the file by processing vendor	Y	Y
<b>Comments</b>	Long Text	Comments field extracted from the metadata of the native file by metadata extraction software		
<b>Conversation</b>	Fixed Length: 255	Normalized subject of e-mails extracted by metadata extraction software. This is the subject line of the email after removing the RE and FW added by the system when emails are forwarded or replied to. This is the		

Field Name	Type	Description	Group By	Pivot
		original subject of the email.		
<b>Conversation Index</b>	Long Text	E-mail thread created by the email system and extracted by the metadata extraction software. This is 44 character string of numbers and letters that is created in the initial email and which has 10 characters added for each reply or forward of an email		
<b>Custodian</b>	Single Choice	User-assigned custodian given to metadata extraction software or manually associated with scanned documents.		Y
<b>Date Created</b>	Date	Date and time from the Date Created property extracted by the metadata extraction software from original file.		
<b>Date Last Modified</b>	Date	Date from the Modified property of a document, representing the date and time that changes to the document were last saved extracted by metadata extraction software.		
<b>Date Received</b>	Date	Received date and time of an e-mail message (according to original time zones) extracted by metadata extraction software.		
<b>Date Sent</b>	Date	Sent date and time of an e-mail message (according to original time zones)		Y
<b>Delivery Receipt</b>	Yes/No	Created by the email application if the email author turn this option on the delivery receipt request notification is either true or false depending on whether the email was registered as delivered to a recipient.		
<b>Doc ID Beg</b>	Fixed Length: 60	Document ID beginning number for scanned/tiffed documents based on page level numbering.		
<b>Doc ID Beg Attach</b>	Fixed Length: 60	Document ID of first document page of family group ***for imaged documents		
<b>Doc ID End</b>	Fixed Length: 60	Document ID end number for scanned/tiffed documents based on page level numbering.		
<b>Doc ID End</b>	Fixed	Document ID of last page of family group *** for		

Field Name	Type	Description	Group By	Pivot
<b>Attach</b>	Length: 60	imaged documents		
<b>Document Extension</b>	Fixed Length: 60	Three character extension of document that represents the file type to Windows Operating System created by metadata extraction software.		Y
<b>Document Subject</b>	Fixed Length: 255	Subject field extracted from the metadata of native file		
<b>Email BCC</b>	Long Text	Recipients of 'Blind Carbon Copies' for e-mail messages extracted by software		
<b>Email CC</b>	Long Text	Recipients of 'Carbon Copies' of the e-mail message extracted by software.		
<b>Email From</b>	Fixed Length: 320	Author of e-mail message extracted by metadata extraction software	Y	Y
<b>Email Subject</b>	Fixed Length: 255	Subject of the e-mail message extracted by metadata extraction software		
<b>Email To</b>	Long Text	Recipients of email message extracted from email file by metadata extraction software	Y	Y
<b>Embedded Data Info</b>	Fixed Length: 400	Message indicating that tracked changes or hidden fields or data present in native file indicated by meadata processing software. Can be changed to HTML field in Relativity to provide warning to reviewers to check native file for data not available in viewer.		
<b>Exceptions</b>	Yes/No	"Y" for documents with issues while processing or extraction exceptions that occurred during metadata extraction		
<b>Extracted Text</b>	Long Text	The full unformatted content of the document either by extracting from electronic file or by OCR processing of scanned images		
<b>File Name</b>	255	File name of the native file extracted as metadata		
<b>File Path</b>	Fixed Length: 255	This is the full path or relative path to the location of the physical file to be viewed in Relativity.		

Field Name	Type	Description	Group By	Pivot
<b>Filesize</b>	Whole Number	Size of the native file in bytes provided by the metadata extraction software		
<b>Folder Path</b>	Fixed Length: 255	Path of original file not including file name. This can be the hierarchy of the files on the system.		
<b>Header</b>	Long Text	Contents of the e-mail message header extracted from metadata		
<b>Importance</b>	Single Choice	Importance field extracted from an e-mail (ex: Normal, Low or High)		
<b>Keywords</b>	Long Text	Keywords field extracted from the metadata of the native file		
<b>MD5 Hash</b>	Fixed Length: 32	Unique identifier created for electronic file or email generated by metadata extraction software and used for deduplication. This algorithm is not available for deduplication scanned images		
<b>Message ID</b>	Fixed Length: 255	Unique identifier of e-mails in mail stores created by software and extracted to field by software		
<b>Number of Attachments</b>	Whole Number	Number of attachments for a particular record. The count of the child items in the family group only appearing on the parent document record.		
<b>Organization</b>	Fixed Length: 255	Company field extracted from the metadata of the file		
<b>Original Folder Path</b>	Fixed Length: 255	Folder location of each native file with hierarchy extracted by software		
<b>Pages</b>	Whole Number	Available for imaged documents only		
<b>Parent Document ID</b>	Fixed Length: 50	Document ID Beg number of parent item for child items in family group *** This must be provided by extraction software		
<b>Privilege Hits</b>	Long Text	List of responsive privilege term hits found in document separated by semi-colon. These terms must be provided before metadata extraction.		

Field Name	Type	Description	Group By	Pivot
<b>Read Receipt</b>	Yes/No	Read receipt request notification saved in email system and extracted from metadata		
<b>Review Beg Attach</b>	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 will repeat for all members of the family group. ***		
<b>Review End Attach</b>	Fixed Length: 60	Review ID of the last file in a family group numbered by the metadata extraction software. ***		
<b>Review ID</b>	Fixed Length: 60	Unique document level identification number assigned by metadata extraction software incremented by one per document not based on pages		
<b>Review Volume</b>	Fixed Length: 60	Review volume name		
<b>Search Hits</b>	Long Text	List of responsive search term hits found in document separated by semi-colon. These terms must be provided before metadata extraction.		
<b>Sensitivity</b>	Single Choice	Sensitivity field extracted from an e-mail (ex: 0 = Normal; 1 = Personal; 2 = Private; 3 = Confidential)		
<b>Title</b>	Fixed Length: 500	Title field extracted from the metadata of native file		
<b>Unread</b>	Yes/No	Read status of an email indicating whether an has ever been opened by indicating true if unopened		

**Relativity Script:**

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

**Outside Source/Production Software/Relativity Script if produced in Relativity:**

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

**User Input:**

Field Name	Type	Description	Group By	Pivot
<b>Production Create Date</b>	Date	Date and time of production creation	Y	Y
<b>Designation</b>	Single Choice	Responsiveness of Document determined by reviewers to indicate whether this document needs to be produced for a document request. Choices typically one of the following Responsive, Non-Responsive, Privilege or Not Sure	Y	Y
<b>Issues</b>	Multi-Choice	Issues for the case	Y	Y
<b>Markup Set-Review</b>	Fixed Length: 400	Markup Set - Review		
<b>Privilege Description</b>	Long Text	Explanation of privilege reason coded by reviewers		
<b>Privilege Type</b>	Multi-Choice	Type of privilege information in document decided by reviewer choices might include: Attorney-Client Communication, Attorney Work Product	Y	Y
<b>Production Date</b>	Date	Date a production was sent	Y	Y
<b>Conversation Family</b>	Fixed Length: 50	Field used by Transform set to indicate Conversation		

## Equivio Fields

Field Name	Type	Description	Relational	Friendly Name
<b>EquiSort</b>	Fixed Length: 1024	Number to sort by based on creation order	N	
<b>EquiSortAttach</b>	Fixed Length: 1024	Number to make attachments sort with parent items	N	
<b>EqDocType</b>	Fixed Length: 10	Description between documents and email	N	
<b>EquiSet</b>	Whole Number	Number indicating near duplicate group	N	
<b>DuplicateSubSet</b>	Whole Number	Duplicate identifier	N	
<b>Similarity</b>	Fixed Length: 10	Indication of similarity	N	
<b>Pivot</b>	Fixed Length: 10	Indication of files that are main document near duplicates are based on	N	
<b>EmailSetID</b>	Whole Number	Email group identifier	N	
<b>EquiThread</b>	Fixed Length: 1024	Email identifiers indicating levels of thread	N	
<b>Inclusive</b>	Fixed Length: 20	Identifier to show group for near duplicates	N	
<b>EquiSetText</b>	Fixed Length: 30	Relational group identifier for near duplicates	Y	EquiSet
<b>EmailSetIDText</b>	Fixed Length: 30	Relational group identifier for email groups	Y	EmailSet

This field list does not include the system level fields.

\*\*\* 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.

## 11 Appendix B Import Errors for Desktop Client

The table below lists the most common import errors found in the Relativity Desktop Client, including their messages, causes, and fixes.

Message	Cause	Fix
<b>Invalid date.</b>	Invalid date format	Change date information to one of standard date formats
<b>Invalid boolean.</b>	Invalid Boolean (yes/no) format	Change data to YES or NO format
<b>Invalid decimal.</b>	Invalid decimal format	Change data to valid number
<b>Invalid integer.</b>	Invalid integer format	Change data to integer
<b>Input length exceeds maximum set length of &lt;max length&gt; for this VarChar field.</b>	Fixed-length text field too long	Increase character restriction on field
<b>Input length exceeds maximum set length of &lt;max length&gt; for the associated object field &lt;name&gt;.</b>	Object name too long	Increase character size of associated object
<b>Error uploading file. Skipping line.</b>	Error uploading file (image)	Verify and incorrect line information
<b>File upload failed. Either the access to the path is denied or there is no disk space available.</b>	Error uploading file (native/object)	Verify disk space is available and check permissions on data server
<b>File '&lt;file name&gt;' not found.</b>	Invalid filename/file does not exist	Verify file is available in path provided
<b>File '&lt;file name&gt;' contains 0 bytes.</b>	Native file empty	Data does not exist in file
<b>document has been previously processed in this file</b>	Identifier Overlap	Same id trying to load twice
<b>Error: full text file specified does not exist.</b>	full text file specified does not exist	Verify path of extracted text file
<b>There are an invalid number of cells in this row -</b>	Invalid cell count for row	Remove extra column delimiter from load file

Message	Cause	Fix
expecting:<expected>, actual:<actual>.		
- This document identifier does not exist in the system - no document to overwrite	Overwrite Error	Overlay unavailable must append
- A document with identifier <document identifier> already exists in the system	ErrorAppend	The identifier field already exists in system you need to do an overlay of this data to overwrite the current data
- This file identifier exists attached to another document with selected key field {0} - This file identifier exists attached to another document with selected ArtifactID {0} - This file identifier exists attached to another document	ErrorBates	Duplicate page id in different document
- Document is already in the selected production	ErrorDocumentInProduction	Bates number is already loaded
- This document contains redactions or annotations that can't be overwritten	ErrorRedaction	Delete the redactions
- There is no image specified on this line	NoImageSpecifiedOnLine	Make sure image id is present in load file
- One of the files specified for this document does not exist	FileSpecifiedDne	Make sure image files are present for represented path
- The image file specified is not a supported format in Relativity	InvalidImageFormat	This cannot be loaded without conversion to an approved format
- The file being uploaded is empty	EmptyFile	No data exists in file so it cannot be loaded
- The identifier field for this row is either empty or unmapped	EmptyIdentifier	Verify that an identifier exists

Message	Cause	Fix
- The identifier specified on this line has been previously specified in the file	IdentifierOverlap	Make sure the identifier field is unique or overlay data
- The document specified has been secured for editing.	SecurityUpdate	Change security permissions to allow document edit rights
- Your account does not have rights to add a document or object to this case	SecurityAdd	Change security permissions to allow document add rights
- A non unique associated object is specified for this new object.	ErrorDuplicateAssociatedObject	
- Your account does not have rights to add an associated object to the current object.	SecurityAddAssociatedObject	Change security permissions to allow updates to object
- An object field references a child object which does not exist.	ErrorAssociatedObjectIsChild	Add child object
- An object field references a document which does not exist.	ErrorAssociatedObjectIsDocument	
- This record's Overlay Identifier is shared by multiple documents in the case, and cannot be imported.	ErrorOverwriteMultipleKey	Use a unique id to overlay the data
- This document contains tags that can't be overwritten	ErrorTags	

## 12 Appendix C Views

The table below lists views found in the workspace template, including a description of purpose and the conditions found in each.

View Name	Description	Conditions
<b>Documents</b>	System default view of all documents loaded in the system	<p><b>Selected Fields</b> – Edit, File Icon, Doc ID Beg, Doc ID Beg Attach, Doc ID End Attach, custodian, Document Extension, Designation, Email From, Email To, Email CC, Email Subject, Author, Title, Parent Date, Date Sent, Date Last Modified</p> <p><b>Conditions</b> - None</p>
<b>My Checked-Out Batch</b>	Displays all the logged in user's checked out documents	<p><b>Selected Fields</b> – Edit, File Icon, Doc ID Beg, Designation, Doc ID Beg Attach, Doc ID End Attach, Custodian, Document Extension, Email From, Email To, Email CC, Email Subject, Author, Title, Parent Date, Date Sent, Date Last Modified.</p> <p><b>Conditions</b> – Batch these conditions – Batch::Assigned To is logged in user AND Batch::Status any of these In Progress</p> <p><b>Sort</b> – Based on Parent Date then Doc ID Beg.</p>
<b>My Checked-Out Batch Items Not Reviewed</b>	Displays all the user's checked-out documents not coded in designation field	<p><b>Selected Fields</b> – Edit, File Icon, Doc ID Beg, Designation, Doc ID Beg Attach, Doc ID End Attach, Custodian, Document Extension, Email From, Email To, Email CC, Email Subject, Author, Title, Parent Date, Date Sent, Date Last Modified.</p> <p><b>Conditions</b> – (Batch These Conditions – Batch::Assigned To is logged in user AND Batch::Status is any of these: In Progress) AND Designation is not set</p> <p><b>Sort</b> – Based on Parent Date then Doc ID Beg.</p>
<b>Responsive Documents</b>	Displays a list of documents that have been reviewed.	<p><b>Selected Fields</b> – File Icon, Doc Beg ID, Custodian, Email Subject, Date Sent.</p> <p><b>Conditions</b> – Designation is Responsive</p> <p><b>Sort</b> – Based on Parent Date then Doc ID Beg</p>

View Name	Description	Conditions
<b>Unassigned and Not Reviewed Documents</b>	Displays a list of documents not assigned.	<p><b>Selected Fields</b> – Edit, File Icon, Doc ID Beg, Custodian, Date Sent, Email From, Email To, Email Subject.</p> <p><b>Conditions</b> – Batch these conditions – Batch::Assigned To is not set AND Designation is not set</p> <p><b>Sort</b> – Based on Parent Date then Doc ID Beg</p>
<b>Unreviewed Documents</b>	Displays a list of documents that have not been reviewed.	<p><b>Selected Fields</b> – Edit, File Icon, Doc ID Beg, Custodian, Date Sent, Email From, Email To, Email Subject</p> <p><b>Conditions</b> – Designation is not set</p> <p><b>Sort</b> – Based on Parent Date</p>
<b>Redacted Documents</b>	Displays a list of documents that have redactions applied.	<p><b>Selected Fields</b> – Edit, File Icon, Doc ID Beg, Custodian, Designation, Markup-Set Review.</p> <p><b>Conditions</b> – Markup Set – Review any of these Has Redactions</p>
<b>Issues Log</b>	Displays a list of documents that have been coded with an issue.	<p><b>Selected Fields</b> – File Icon, Doc ID Beg, Email From, Email To, Email CC, Email Subject, Designation, Issue</p> <p><b>Conditions</b> – Issue is set</p>
<b>Privilege Log</b>	Displays a list of documents that have been coded as privileged.	<p><b>Selected Fields</b> – Edit, File Icon, Doc ID Beg, Designation, Custodian, Email From, Email To, Email CC, Emails Subject, Author, Title, Parent Date, Privilege Type, Privilege Description.</p> <p><b>Conditions</b> – Privilege Type is set</p> <p><b>Sort</b> – Based on Parent Date</p>

## 13 Work Product Tab

Field Name	Type	Description	Group By	Pivot
<b>Attorneys</b>	Multiple Object	List of attorneys from contact list that created document.		
<b>Case</b>	Multiple Object	Case information for document		
<b>City</b>	Fixed Length: 300	City of contact names		
<b>Company</b>	Fixed Length: 300	Company name of contact		
	Long Text	Explanation of privilege reason coded by reviewers		
<b>Privilege Type</b>	Multi-Choice	Type of privilege information in document decided by reviewer choices might include: Attorney-Client Communication, Attorney Work Product	Y	Y
<b>Production Date</b>	Date	Date a production was sent	Y	Y

## 14 Security Setup

The Starter Template has three levels of security setup. This is only a guideline and can be edited to the appropriate security in your environment.

Level 1 is targeted at base level reviewers who have very limited rights and primarily will check out batches and edit documents.

Level 2 will be able to do more case setup such as create searches and batches. This level will not have administrative rights or case setup rights but will have rights for setting up and administering the review process.

Level 3 is not a full administrator however all case loading and setup options are available to Level 3. This person will be responsible for loading the data and insuring layouts and views are properly created.

Security	Level 1	Level 2	Level 3
Workspace	View	View	View
Folder	View	Edit	Delete/Add/Edit Security

Security	Level 1	Level 2	Level 3
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 Choice	View	Edit/Add/Edit Security	Delete/Add/Edit Security
Markup Set	View	View	Delete/Add/Edit Security
Tab	View	Edit/Add	Delete/Add/Edit Security
Batch Set	View	View	Delete/Add/Edit Security
Batch	View	Edit/Add	Delete/Add/Edit Security
Object Type	View	Edit/Add	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
<b>Tab Visibility</b>			
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

Security	Level 1	Level 2	Level 3
Pleadings	No	Yes	Yes
Work Product	No	Yes	Yes
Workspace Details	No	No	Yes
Production Sets	No	Yes	Yes
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
<b>Browsers</b>			
Clusters	No	No	Yes
Folders	Yes	Yes	Yes
Advanced & Saved Searches	No	Yes	Yes
Field Tree	Yes	Yes	Yes
<b>Mass Actions</b>			
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
Create Word Index	No	Yes	Yes
Mass Move	No	No	Yes
Mass Replace	No	Yes	Yes
Tally/Sum/Average	Yes	Yes	Yes

Security	Level 1	Level 2	Level 3
<b>Admin Operations</b>			
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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