



Workstation Configuration

v6.5

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1 Overview

Before using Relativity for document review it is important to consider the properties involved in workstation configuration:

- End User PC Requirements
- Viewer Installation
- Viewing Native Documents in Internet Explorer
- Foreign Language Documents
- Quick View Plus

This document outlines those workstation components that ensure Relativity's accessibility and functionality.

2 End-User PC Requirements

This section outlines requirements and recommendations for a workstation used to access Relativity.

2.1 Supported Software

Relativity is accessible from a Windows based PC running Internet Explorer. Unlisted browsers and operating systems are not supported.

2.1.1 Supported Operating Systems

- Windows XP
- Windows Server 2003
- Windows Vista
- Windows 7

2.1.2 Supported Browsers

- Microsoft Internet Explorer 7.x
- Microsoft Internet Explorer 8.x

2.2 Hardware

A user's workstation and network connection have a significant influence on his/her Relativity experience.

2.2.1 Minimum workstation configuration

- 512MB SDR memory
- Intel Pentium 3 or equivalent

2.2.2 Recommended workstation configuration

- 1GB DDR memory
- Intel Pentium 4/AMD Athlon XP

3 Viewer Installation

Relativity displays case documents in the Viewer, Native, Image, Productions, and Extracted Text modes, each of which provide the user a different way to view and work with the content of those documents. This section outlines the installation of the viewer.

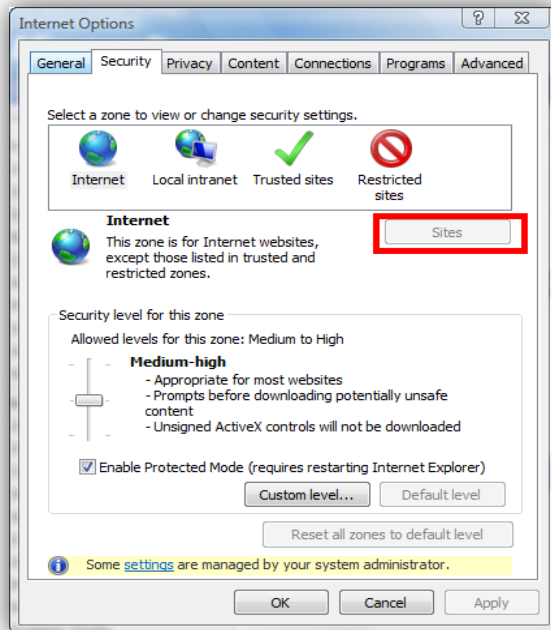


Note the following if you are running an OS that is x64 and not x86: because the Relativity Viewer is a 32-bit application, you need to use IE x86 (32-bit) when accessing Relativity.

3.1 Adding Relativity as a Trusted Site

By default, IE will prompt a user to verify viewer downloads. Adding Relativity as a trusted site allows the installation to proceed without warnings. It is also required for proper operation of the viewer. This, along with custom level settings within the Internet Options tab, will allow for the Relativity viewer to be installed.

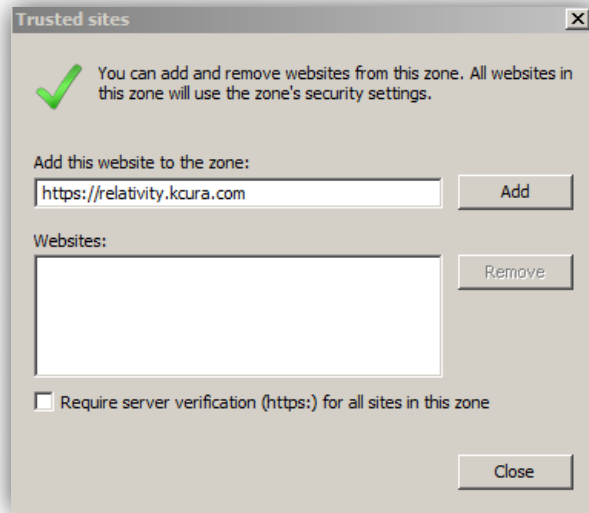
In Internet Explorer, browse to **Tools**, then **Internet Options**. From the Internet Option window, select the **Security** tab.



Internet Options Display

On the Security tab, select **Trusted sites** (usually a green check mark) and then click on the **Sites** button indicated above by the red box.

This will bring up the Trusted Site window:



Trusted Site Window

Your Relativity URL should display in the Add this website to the zone: textbox. Click **Add**. This adds Relativity to the list of trusted sites.

In addition to adding Relativity as a trusted site within your Internet Options, you may have to address your custom level settings to allow for the viewer to be installed. For more information on custom level settings, go to Appendix A: Custom Levels Inside Internet Options.

3.2 Installing the Viewer

There is a brief one-time process required install the Relativity viewer. This process starts when opening a document for the first time. The installation process should begin automatically, but there may be a warning from the pop-up blocker in the top bar of Internet Explorer:

- “This website wants to install the following add-on: ‘Relativity Web Client Manager x.xx.xxx.x Installer’ from ‘kCura Corporation’. If you trust the website and the add-on and want to install it, click here...”



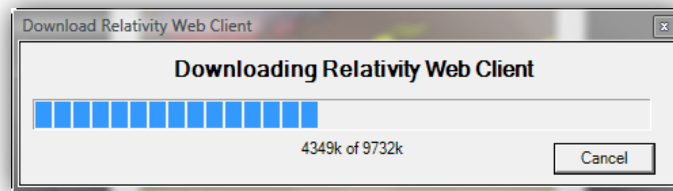
Viewer Installation Warning

Right click on the warning and select **Install Active X Control**. This launches the installer, as seen below:



Install Confirmation

Click **Install**. There may be a delay as the installation sets up, depending on PC speed. The installation process will start downloading the necessary files, as seen below:



Download Progress Display

After downloading, the viewer should install automatically.

Occasionally, this process may not start automatically, requiring you to download and install additional components:

- Microsoft .NET Framework v3.5
- Microsoft C++ 2005 SP1 Redistributable

To download .NET Framework v3.5, go to:

- <http://www.microsoft.com/downloads/details.aspx?familyid=A B99342F-5D1A-413D-8319-81DA479AB0D7&displaylang=en>

The second requirement for the viewer installation is Microsoft C++ 2005 SP1 Redistributable. It can be installed by visiting:

- <http://www.microsoft.com/downloads/details.aspx?familyid=2 00B2FD9-AE1A-4A14-984D-389C36F85647&displaylang=en>



In the event that the user encounters restrictions in installing the viewer, a ClassID may be required to enable the ActiveX controls. For more information on ClassID's contact kCura Support at support@kcura.com.

In the event that you encounter issues during any stage of the above viewer installation process or you are blocked from installing the viewer via the above process, go to Appendix B: Viewer Configuration for supplemental information on how the viewer is configured.

4 Viewing Native Documents in Internet Explorer

When reviewing documents in Relativity, it may be beneficial to open the document in its native application. If you have Windows XP, you can configure Internet Explorer to launch the native application docked in the Relativity viewer frame.



This functionality is not available in Microsoft Windows Vista. Users running Vista may view native documents from the native application, but cannot dock that application into the IE browser.

4.1 Configure a File Type for Viewing Within IE

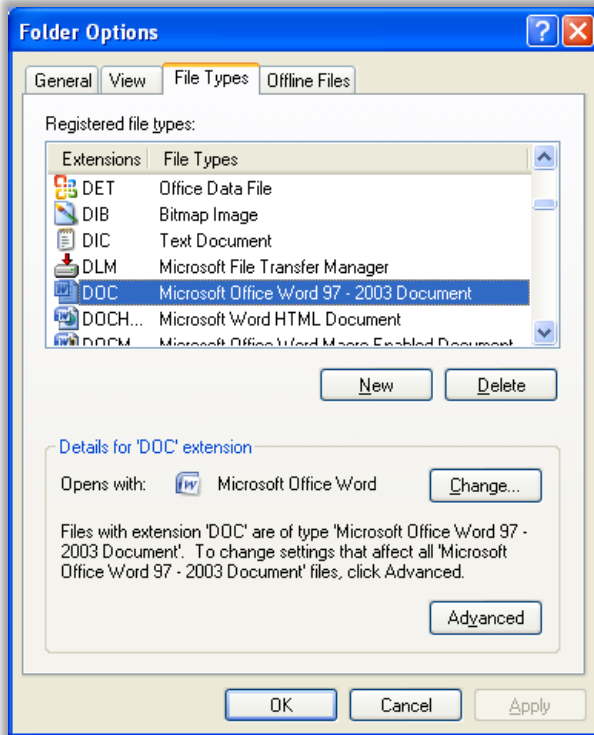
To configure a file type in Windows XP for viewing within Internet Explorer complete the following. (Note that the "Browse in same window" option below is not available in Windows Vista or 7.):

1. Close all open IE sessions before you begin.
2. Open **Windows Explorer** by either double-clicking on the My Computer icon or combining Windows Key + D on your keyboard.
3. Open the **Tools** menu and select **Folder Options**.



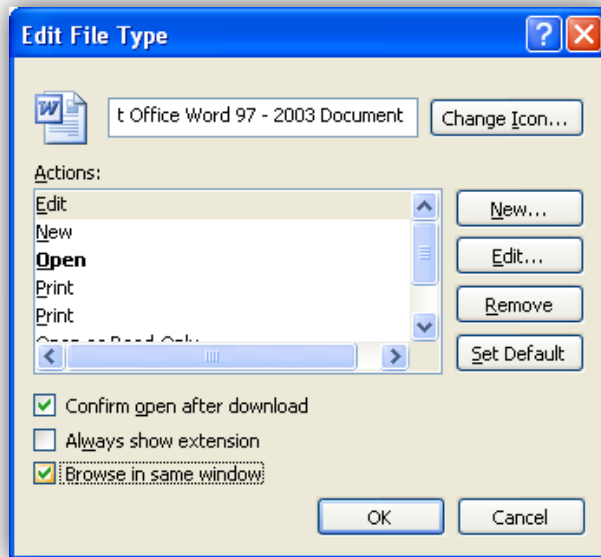
Internet Explorer Tools Menu

4. Click on the **File Types** tab and select the desired file type from the list.



File Types Display

5. Click on the **Advanced** button.
6. Check **Browse in same window** and click **OK**.



Edit File Type Display



Not all native file types support the “Browse in same window” option.

If this option is disabled for the file type you have selected, this file type may only be viewed in its native application.

7. Login to Relativity and open a document of this file type.
8. Click on the **Native** tab; verify that the document now opens within the IE browser window.
9. Repeat these steps for any additional file types, if desired.

5 Foreign Language Documents

Relativity allows you to review foreign language documents.

If you are reviewing documents on Windows Vista or 7 PC, no steps are required. You should be able to view foreign language documents immediately.

However, installation steps are required if you are:

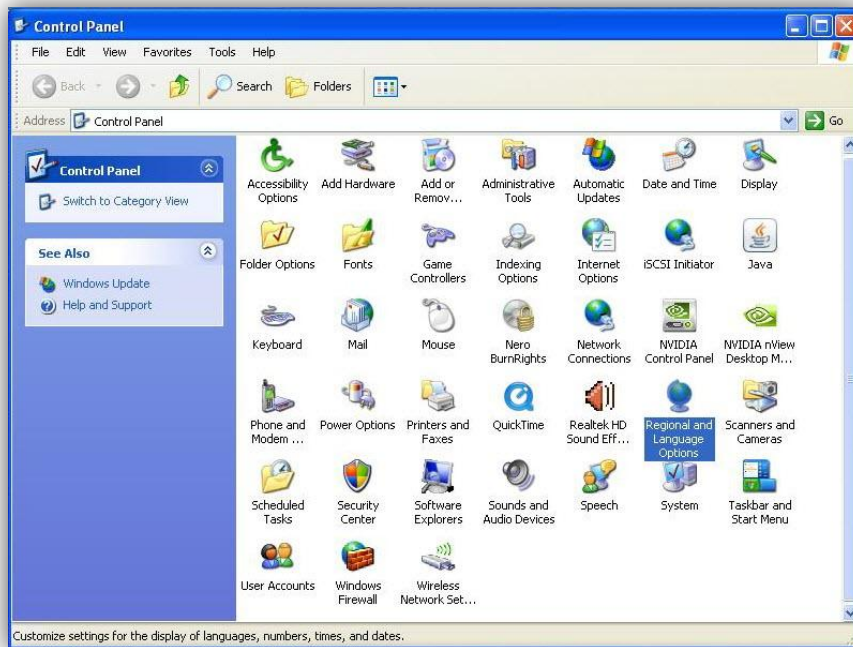
- Reviewing documents on a Windows XP PC
- Managing a background processing server
- Managing a web server

The following installation steps are provided by Microsoft. To learn more, visit their website at <http://support.microsoft.com/>.

5.1 Installing Foreign Language Settings

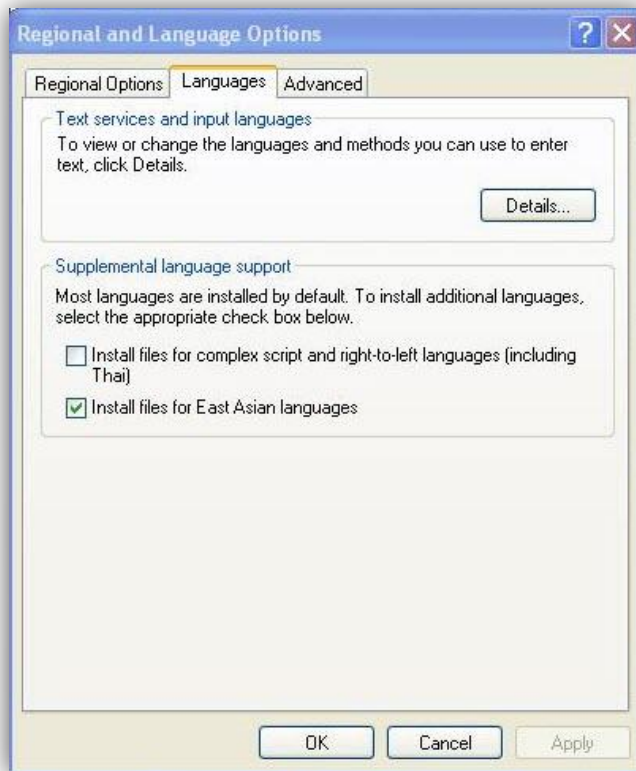
To view foreign language documents, you must have the applicable languages installed in your Microsoft Operating System.

1. Select **Start | Control Panel**, and click the **Regional and Language Options** icon.



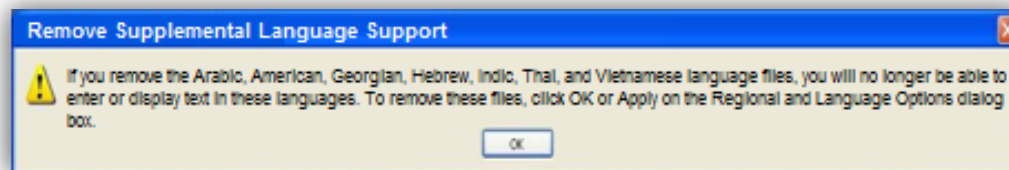
Regional and Language Options

2. Select the **Languages** tab.



Languages Tab

3. Under Supplemental language support, select the **checkbox** which applies to your language needs. The complex script and right-to-left languages include Arabic, Armenian, Georgian, Hebrew, the Indic languages, Thai, and Vietnamese; the East Asian languages include Chinese, Japanese, and Korean. The files for most other languages are installed on your computer automatically by Windows.
4. Click **OK** and **Apply**.



Remove Supplemental Language Support

5. You will be prompted to insert the Windows CD-ROM or point to a network location where the files are located. After the files are installed, you must restart your computer.

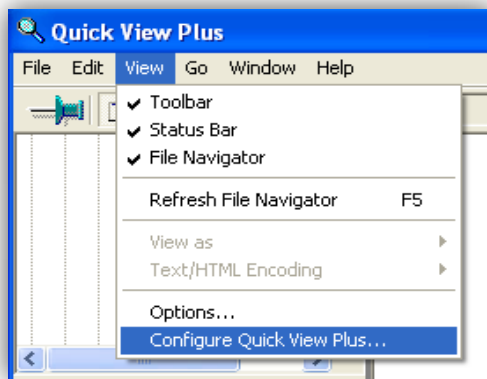
To remove the language files, deselect the **checkbox** beside the applicable collection and click **OK** and **Apply**.

6 Quick View Plus

The Relativity Viewer is driven by the same technology that drives Quick View Plus. As a result, you may see conflicts while trying to use the Relativity viewer on a machine with Quick View Plus installed.

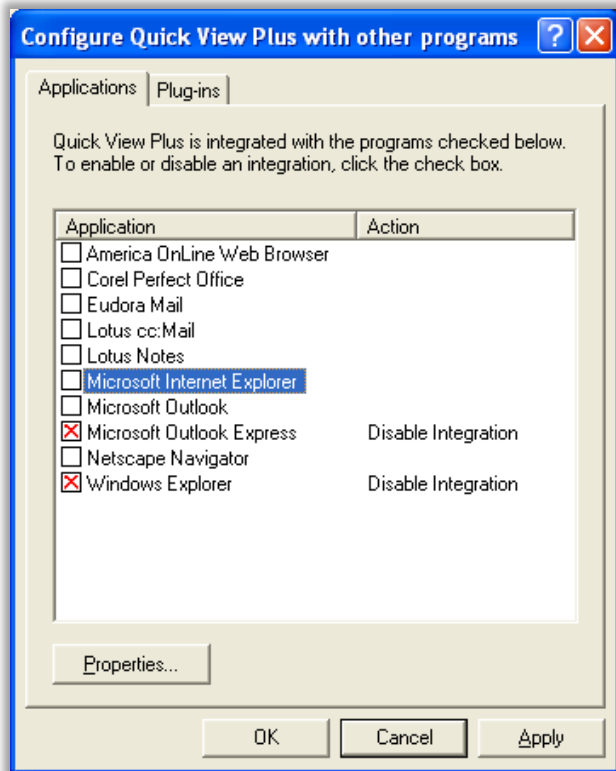
6.1 Configuring Quick View Plus

1. Open Quick View Plus and select **View | Configure Quick View Plus**.



Configure Quick View Plus Option

2. A menu displays a list of the application with which Quick View Plus integrates.



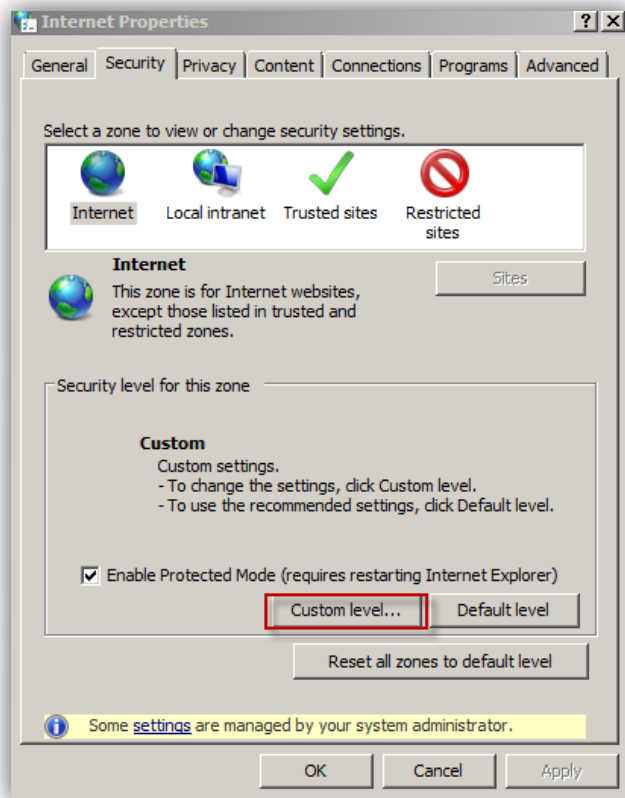
Applications Display

3. Click any of the following applications that appear on the list. The "Action" section will read "Disable Integration."
 - Microsoft Internet Explorer
 - Microsoft Outlook
 - Microsoft Express
 - Microsoft Word
 - Microsoft Excel
 - Microsoft PowerPoint
4. Click **Apply**, and then close out of Quick View Plus.
5. Locate the small magnifying glass icon in your Windows taskbar. This is the icon for Quick View Plus.
6. Right-click on the icon and select **Exit Quick View Plus**.
7. Close all open Internet Explorer Windows and begin a new session.
8. Login to Relativity and verify that you can now correctly display documents in the Relativity Viewer.

7 Appendix A: Custom Level Settings Inside Internet Options

In addition to adding Relativity as a trusted site within your Internet Options, you may have to address your custom level settings to allow for the viewer to be installed.

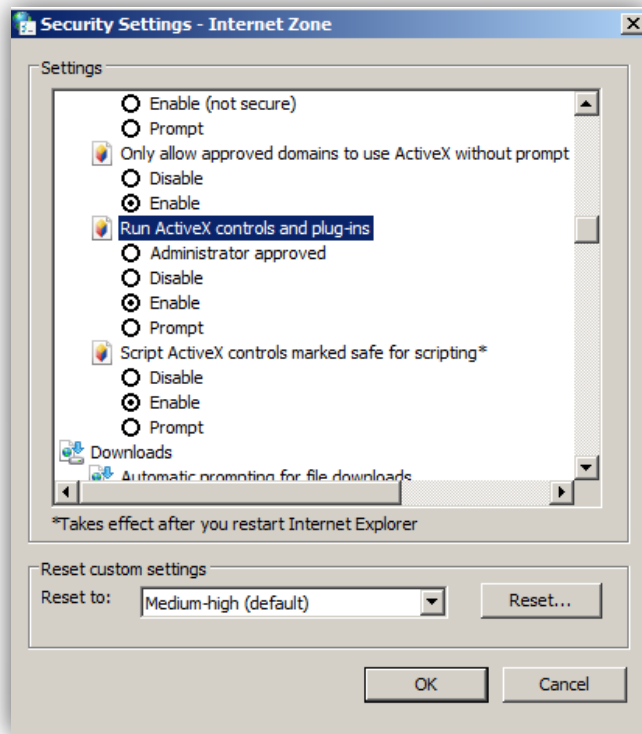
To set your custom levels, first click the **Custom level...** button inside your Internet Option | Security tab.



Custom Level Tab

The following custom level must be set to **Enable** via the radio button next to the level name:

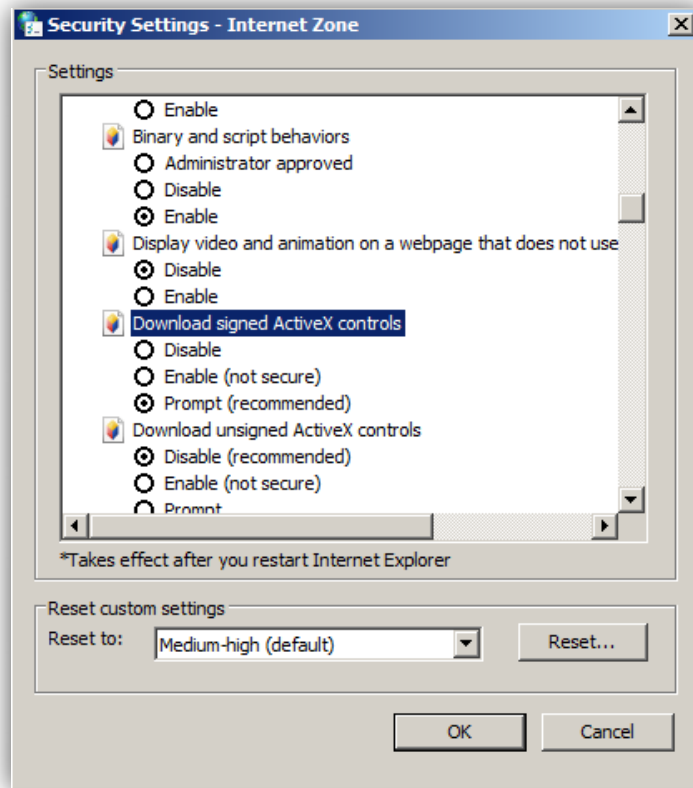
- **Run ActiveX controls and plug-ins**



Run ActiveX Controls and Plug-ins

The following custom level must be set to **Prompt** via the radio button next to the level name:

- **Download signed ActiveX controls**

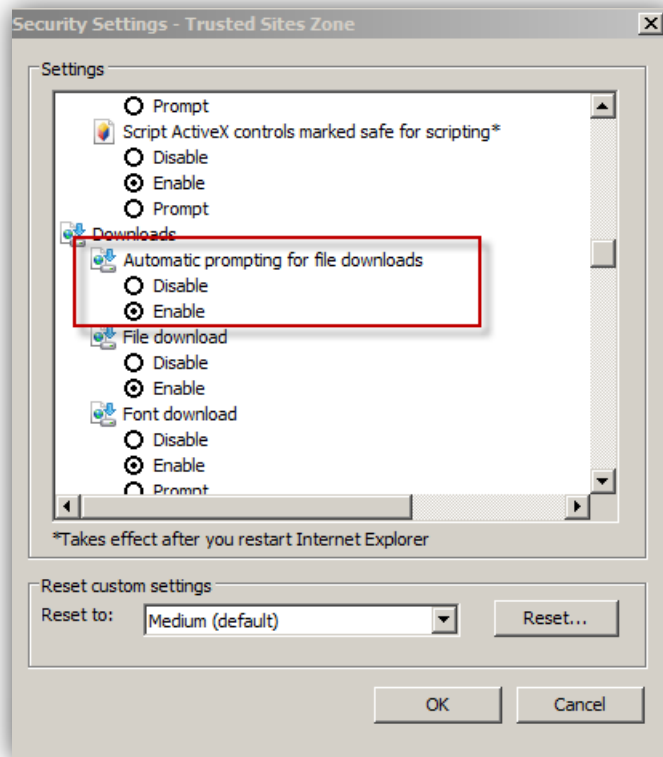


Download Signed ActiveX Controls

Note that failure to properly set the above internet custom levels could prevent viewer installation from being completed.

To ensure that document review within the Viewer is not repeatedly interrupted by download prompts at the top of the screen, consider enabling the Automatic prompting for file downloads option. To do so:

1. Go to **Internet Options**
2. Click on **Trusted Sites**
3. Select the **Custom level...** button
4. Scroll down to the **Downloads** heading and click the **Enable** radio button next to "Automatic prompting for file downloads" as seen below



File Downloads Display

8 Appendix B: Viewer Configuration

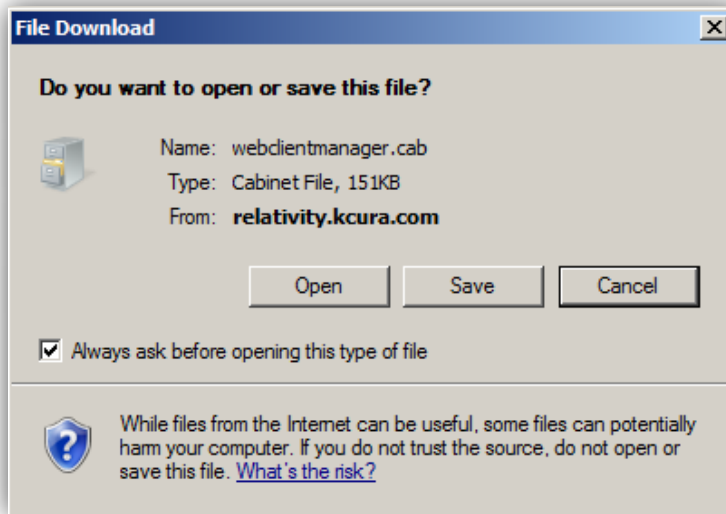
In the event that you encounter issues during any stage of the viewer installation process covered in section 3.2 Installing the Viewer, consider the following supplemental ways in which the viewer is configured.

Via your Relativity URL, download the following:

- Webclientmanager.cab
- Webclient.msi
- Vcredist_x86.exe

First download the Webclient Manager:

1. Go to:
Error! Hyperlink reference not valid.(your Relativity URL)/[activex/webclientmanager.cab](#)

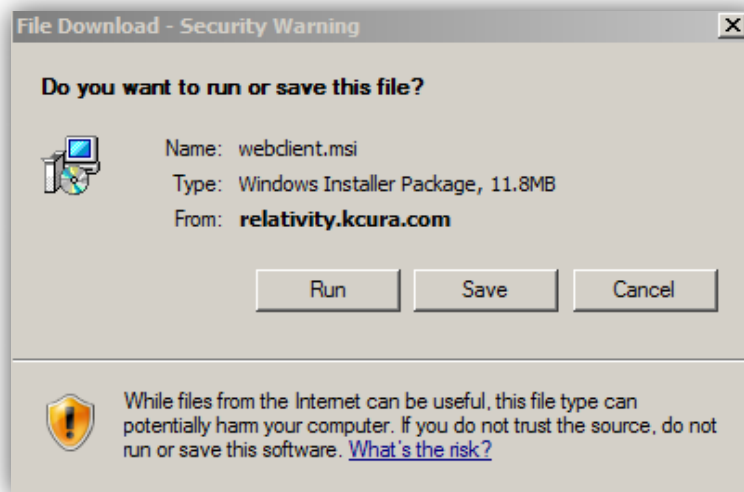


Webclient Manager Download

2. Click **Save**.
3. Click **Open** to view the files.

To download the Webclient.msi:

1. Go to:
Error! Hyperlink reference not valid.(your Relativity URL)/[activex/webclient.msi](#)



Webclient.msi Download

2. Click **Run**.



Run Software Display

3. Click **Run**.
4. Click **Next**.



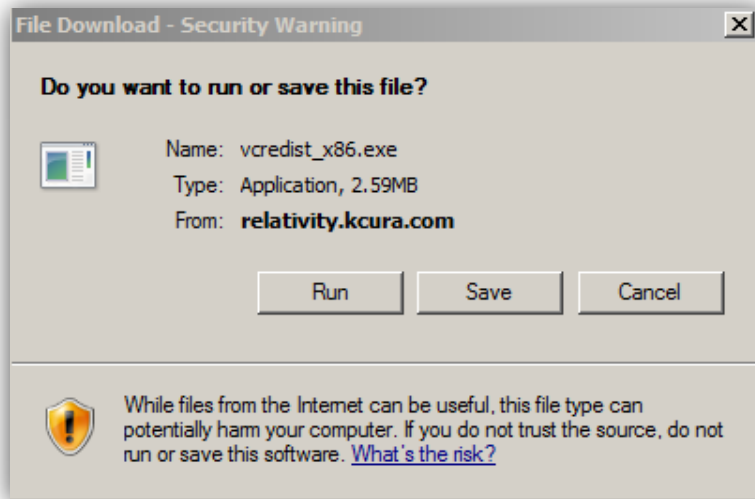
In the event that a user's environment is setup without SSL, it is possible for a file to download outside of SSL by changing the Download Handler URL setting inside the Case Details tab. To do this, contact your case administrator.

5. Click **Next**.
6. Click **Next**.

Relativity Web Client is now installed.

To download the vcredistx_86.exe file:

1. Go to:
Error! Hyperlink reference not valid.(your Relativity URL)/[activex/vcredist_x86.exe](#)



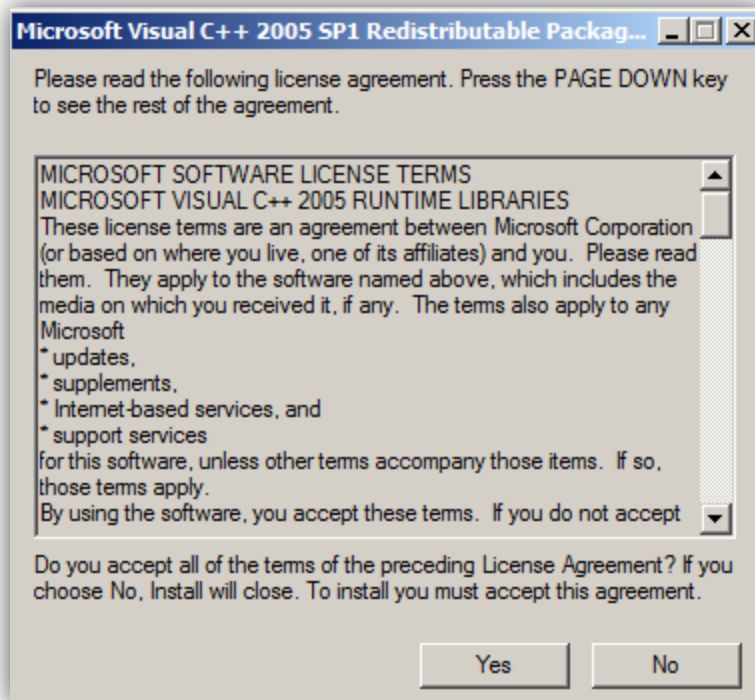
Vcredist_x86.exe File Download

2. Click **Run**.



Run Software Display

3. Click **Run**.



License Agreement Display

4. Click **Yes** to accept the terms and proceed with the installation.

In addition to the above options, the Relativity Viewer Installation Kit is also available on the Relativity Customer Portal.

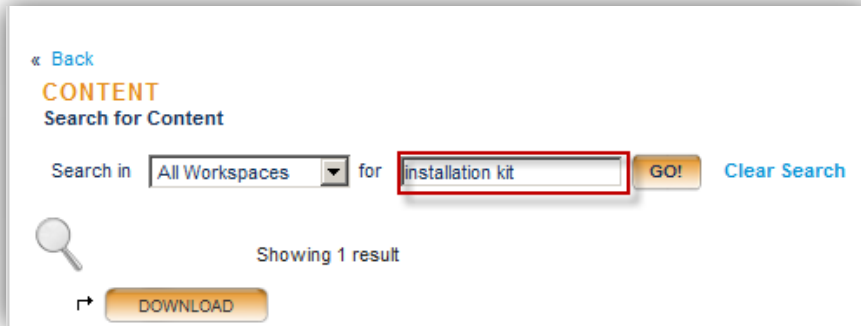
To download the Viewer Installation Kit:

1. Login in to the Customer Portal and select the **Content** tab.



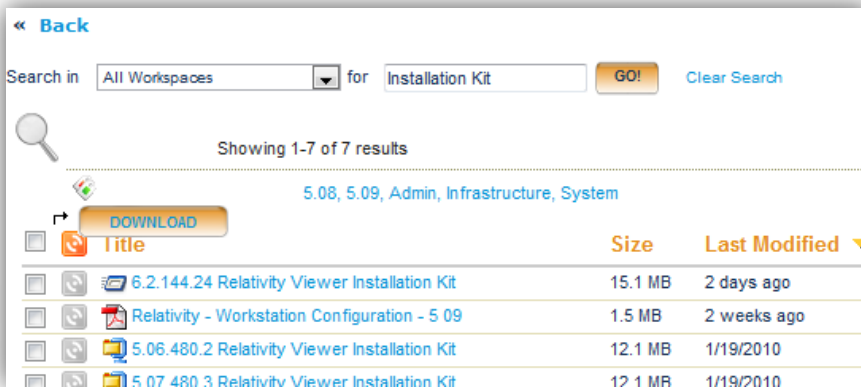
Customer Portal Content Tab

2. Search for **Installation Kit** in the Search in box.



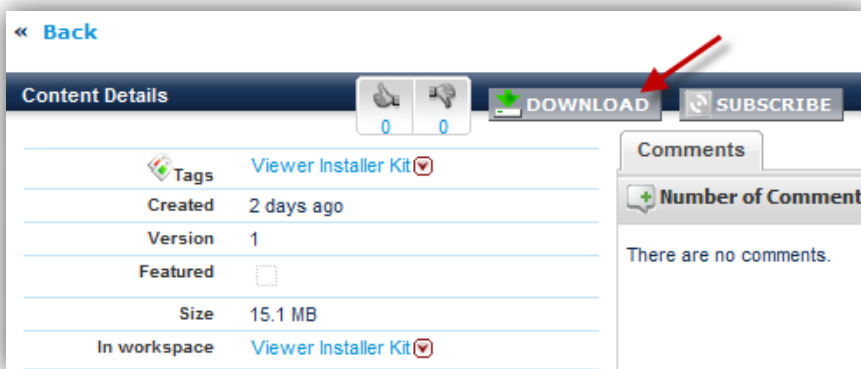
Installation Kit Search

3. Select the **6.2.xxx.x Relativity Viewer Installation Kit** hyperlink.



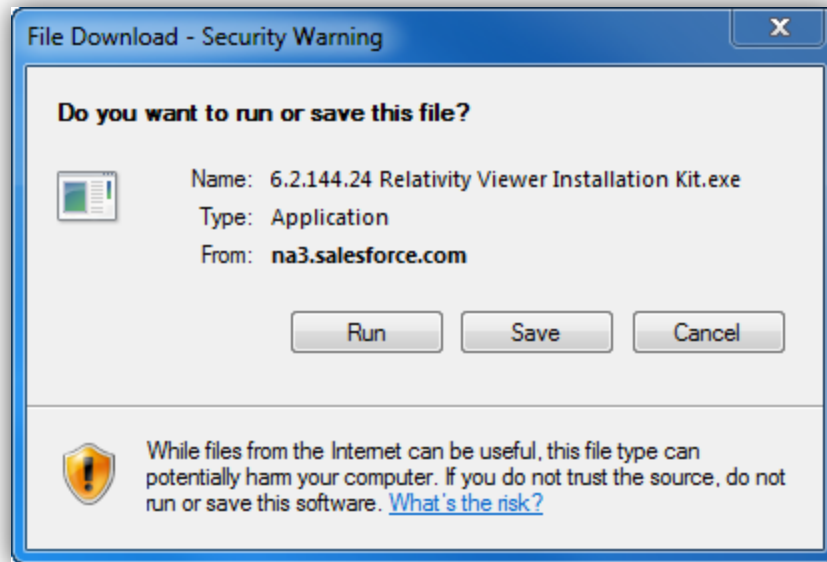
Viewer Installation Kit Hyperlink

4. Click the **Download** button.



Download Viewer Installation Kit

5. Open or Save the file.



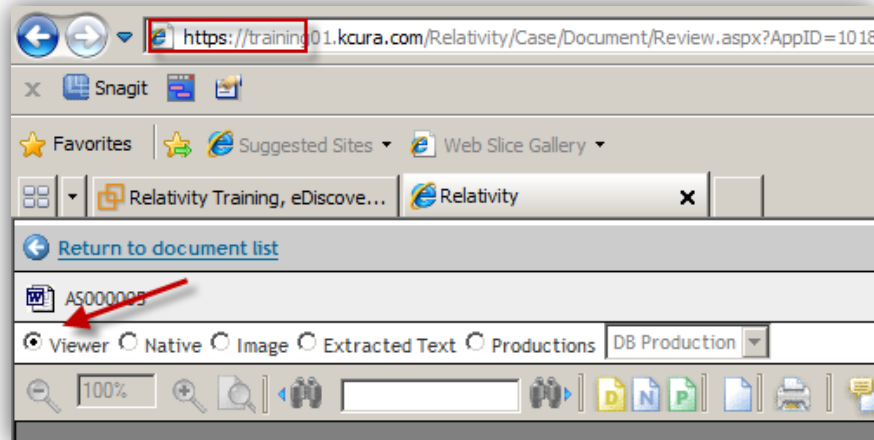
File Download Display

Note that the Viewer Installation Kit will go through and install any of the missing components required for the viewer to be installed on the user's machine. It will not, however, install the required ActiveX controls.

9 Appendix C: Network Considerations

Consider the following:

- The viewer uses the RelativityWebAPI as well as the Relativity.Distributed components.
 - Inside the viewer the Distributed piece is called from within the application, as evidence by the URL referenced in the bottom left corner of the viewer pane once the viewer radio button is clicked.
- The files retrieved in the viewer are HTTPS, as seen seen below:



Viewer URL Display



While certificate validation is often based on the standard HTTPS security feature based on the URL as found within Internet Options, it is not always.

If a user does not have the latest Microsoft updates to add 3rd Party Certificate authorities as trusted certificates, an error message could occur, even if the correct website is used.

10 Disclaimer

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