



Workstation Configuration

v7.3

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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.



Relativity viewer versions 6 and 7 are side by side compatible. To ensure proper viewer functionality, users must close their browsers before they switch from one version to the next.

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 2008
- Windows Vista
- Windows 7

2.1.2 Supported Browsers

- Microsoft Internet Explorer 7.x (32 bit)
- Microsoft Internet Explorer 8.x (32 bit)
- Microsoft Internet Explorer 9.x (32 bit)

Note: Relativity does not support 64 bit Internet Explorer.

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

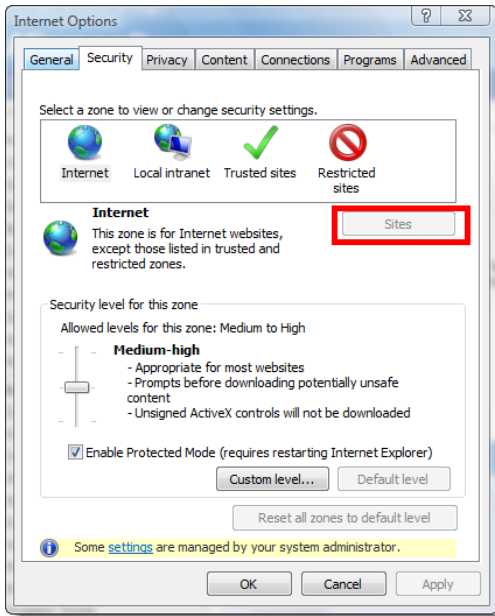


Note the following if you are running an OS that is x64 and not x86: because the Relativity Viewer is a 32-bit application, you need to use IE x86 (32-bit) when accessing Relativity.

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. The use of custom level settings within the Internet Options tab, also allow the Relativity viewer to be installed.

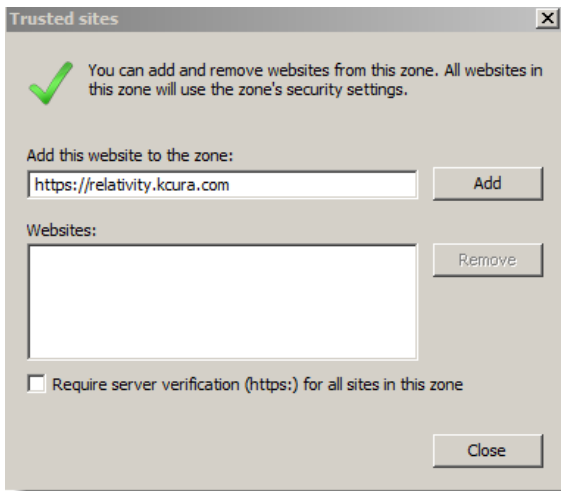
In Internet Explorer, browse to **Tools**, then **Internet Options**. From the Internet Option window, select the **Security** tab.



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 modify your custom level settings for the viewer to be installed. For more information on custom level settings, go to Appendix A: Custom Levels Inside Internet Options.

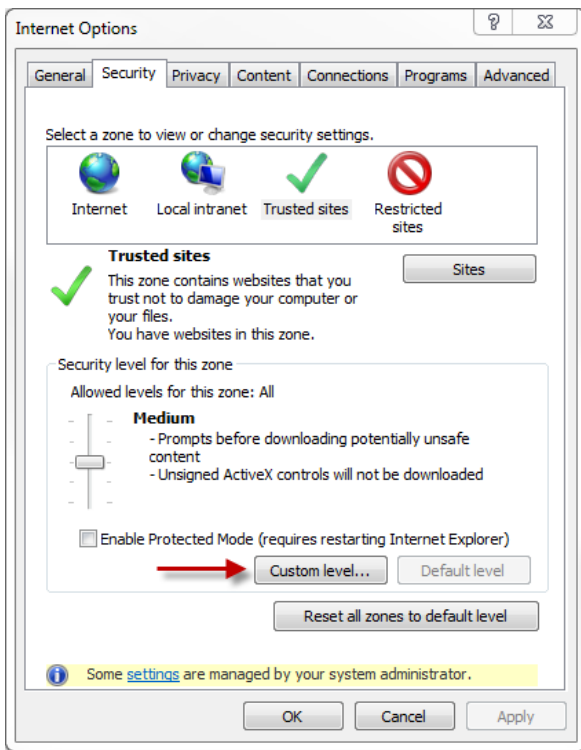
3.2 Configuring IE in Environments with Distributed Web Components

You will need to complete an additional configuration step for IE if your environment is configured with Relativity web components installed on separate web servers.



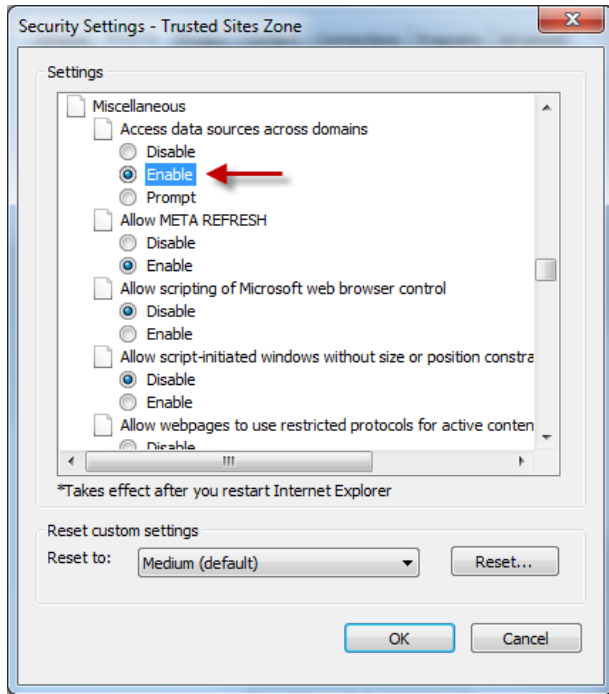
If you are not working in an environment with distributed web components, you can skip this configuration step. Contact your System Administrator for additional information about your environment configuration.

After you add Relativity as a Trusted Site, click **Custom level** on the Security tab.



Security Tab with Custom Level Button

On the Trusted Sites Zone window, scroll down to the option called **Access data sources across domain**. Select **Enable**, and click **OK**.



Option for Accessing Data Sources across Domains

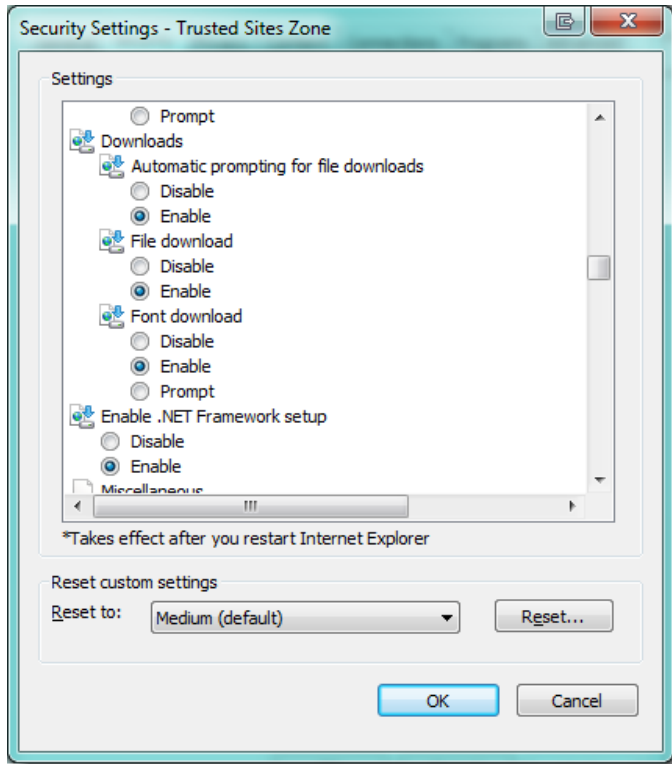
3.3 Configure Download Settings

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

On the Security tab, select **Trusted sites** (usually a green check mark) and then click on the **Custom Level** button on the lower half of the screen.

On the Security Settings – Trusted Sites Zone popup, scroll down to the **Downloads** section.

Configure the settings in this section to match the following:



Download Settings

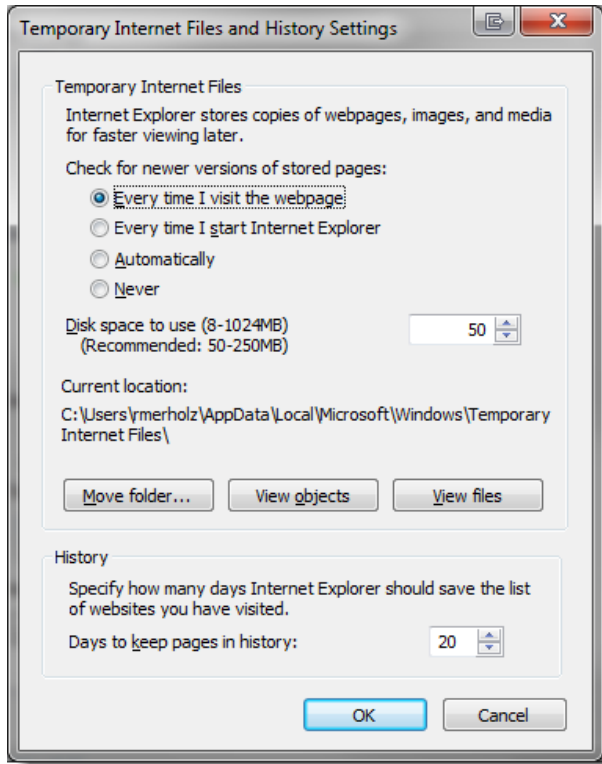
Click **OK**.

3.4 Configure Temporary Internet File Settings

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

On the General tab, under **Browsing History**, click **Settings**.

On the Temporary Internet Files and History Settings popup, check the radio button **Every time I visit the webpage**.



Temporary file settings

Click **OK**.

3.5 Enterprise Deployment of the Viewer

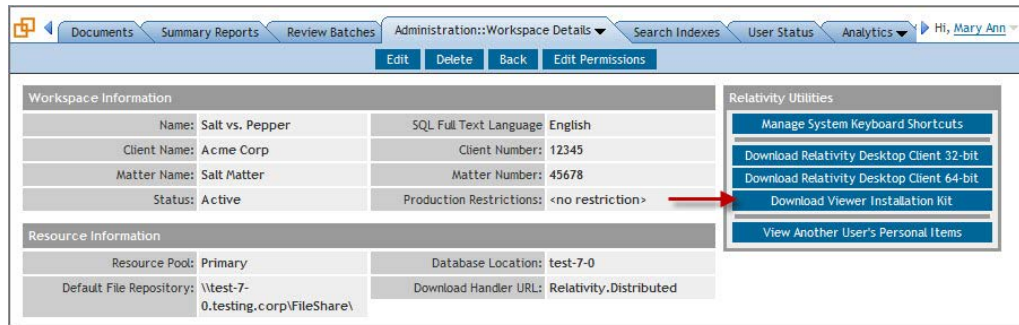
This section includes instructions for use by administrators who want to deploy the viewer across their organization. You can download a standalone utility for installing the viewer, and then run it according to the procedures established by your organization for installing applications.



To obtain the Viewer Installation Kit, you must be able to access a workspace in Relativity. You must also have the security permission **View Workspace Details** under Admin Operations on the Security page.

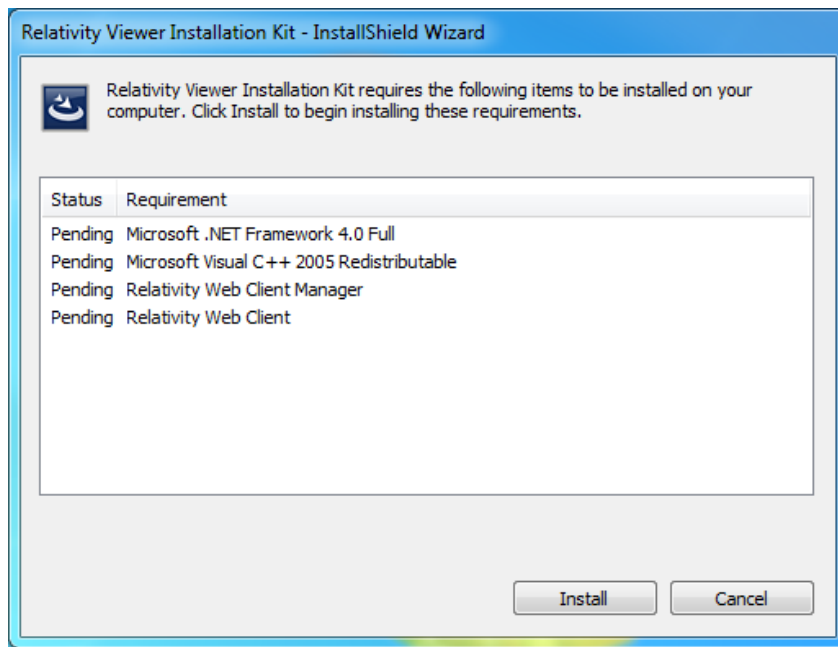
1. Log in to Relativity.
2. Click on a workspace where you have the security permission **View Workspace Details**.

3. Select the **Administration** tab, and click **Workspace Details**.



Workspace Details Page

4. Click **Download Viewer Installation Kit** to download the utility containing executable files for the viewer installation.
5. Run the executable and follow the instructions on the dialog boxes. Depending on the current workstation configuration, some or all of the files list in the following dialog box will be installed.



Workspace Details Page

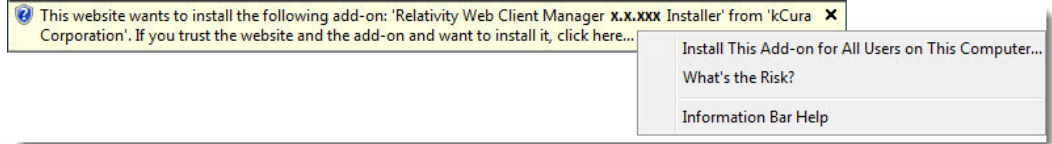
6. Restart the browser after the installation is completed.

3.6 Single Workstation Installation of the Viewer

You will need to complete a one-time process to install the Relativity viewer. This process is initiated when you open a document in the Relativity viewer for the first time. Before you begin, make sure that you have completed the steps in section Adding Relativity as a Trusted Site.

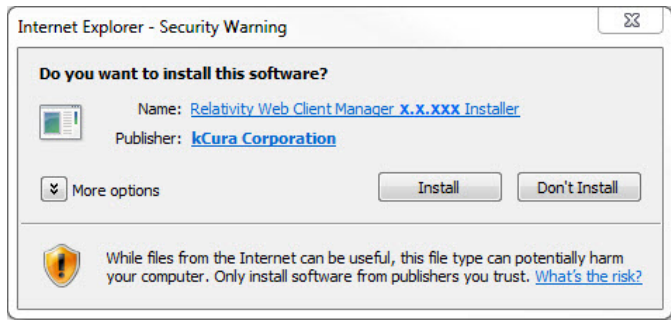
The settings on your workstation determine the steps that you will complete to install the viewer. This section describes the messages that most users will encounter and be required to install.

1. Log in to Relativity, and navigate to a workspace. Click on a document to open it.
2. If a warning message is displayed at the top or bottom of your browser, use the following instructions to install the add-on. Otherwise, complete Step 3.



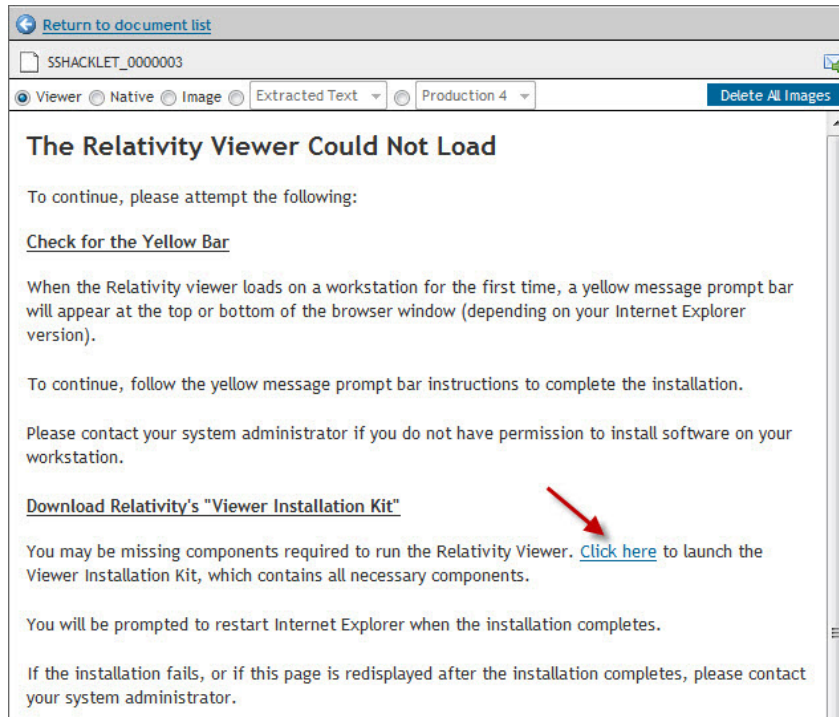
Viewer Installation Warning

- a. Right click on the warning and select **Install This Add-on for All Users on This Computer**.
- b. Click **Install** on the pop-up.



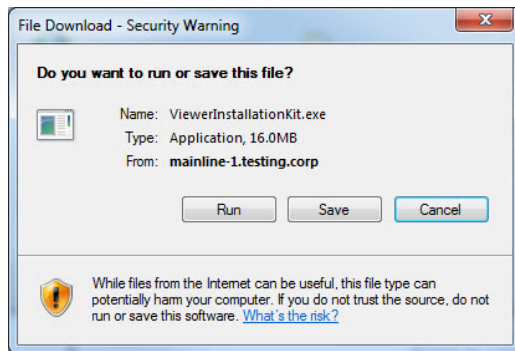
Install Confirmation

- c. If the viewer has successfully installed, you can begin working with your document. Complete Step 3 if an error message displays.
3. If Relativity displays a message indicating that the viewer could not load, use the following instructions to run the Viewer Installation Kit.



Relativity Error Page

- a. Click the link to launch the Viewer Installation Kit.
- b. Click **Run** on the File Download warning message.



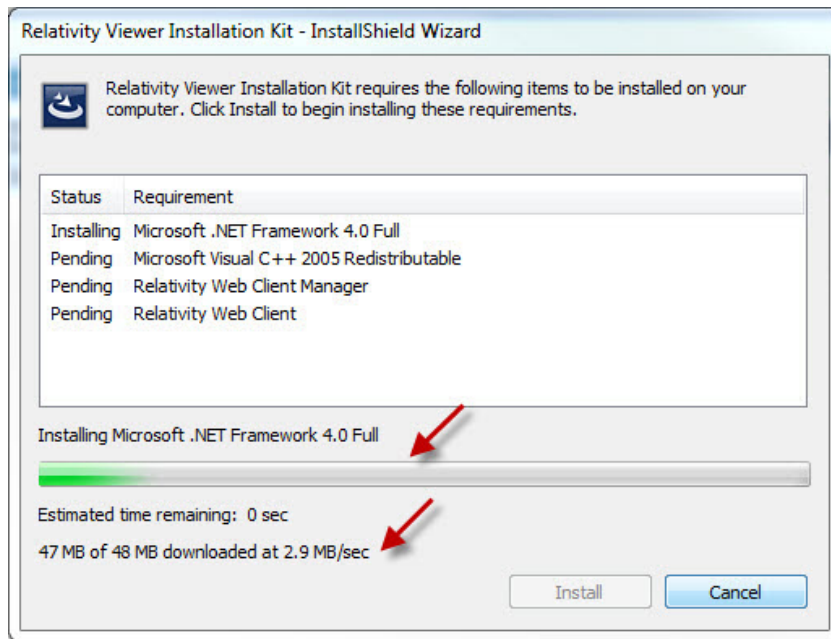
File Download – Security Warning

- c. Click **Run** to begin the installation process.



Confirm Viewer Installation

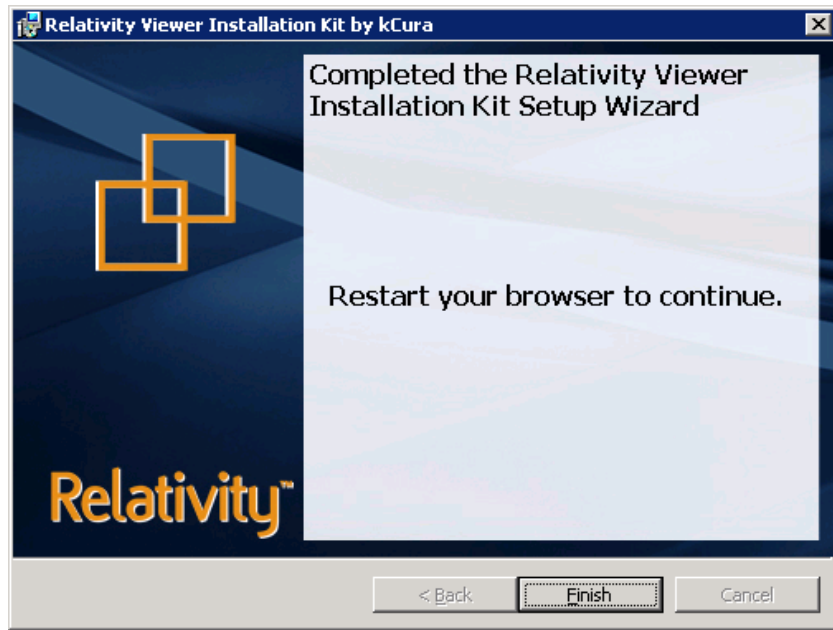
- d. Click **Install** to download the installation files. Depending on your workstation configuration, you may see all or some of the files listed in wizard for Relativity Viewer Installation Kit.



Installation Wizard for the Viewer

The required files for the viewer may take several minutes to download. The installation wizard will display a progress bar for monitoring the download of these files.

- e. After the installation completes, click **Finish** on the confirmation message.



Installation Confirmation Message

- f. Close and then reopen your browser. You can now use the viewer to display documents in your review.

3.6.1 Issues with Multiple File-Viewing Applications

If your workstation does not support multiple file-viewing applications, you may encounter Viewer issues.

An error can occur while attempting to load Oracle Outside In dlls when another version of Relativity is run in the same IE session or when other file-viewing tools such as Quick View Plus or iPro are installed on the machine.

To resolve this issue, close all IE windows and reopen Relativity. If this does not resolve the issue and you are using Quick View Plus, please refer to the Quick View Plus section of this document.

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

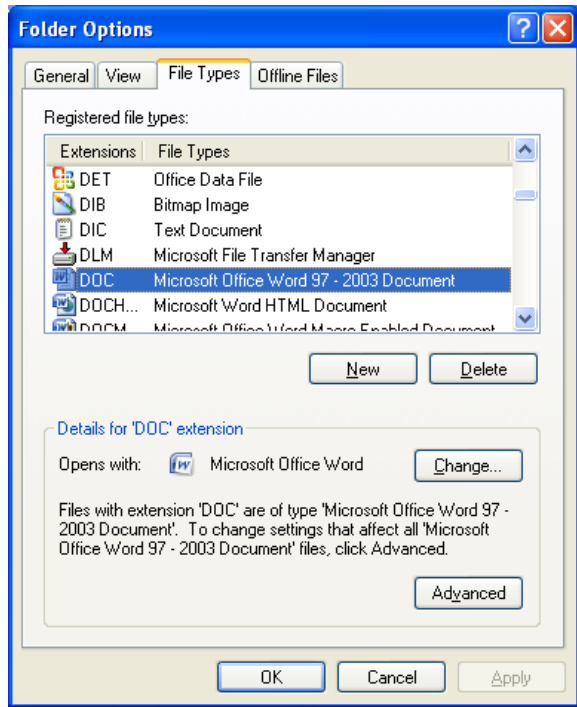
To configure a file type in Windows XP for viewing within Internet Explorer, complete the following. (Note that the “Browse in same window” option below is not available in Windows Vista or 7.):

1. Close all 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**.



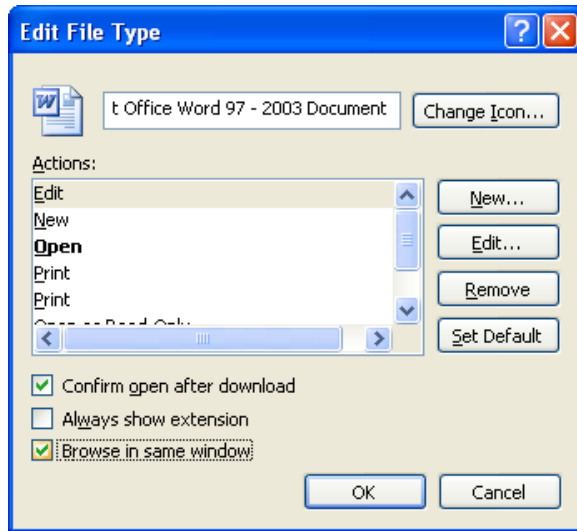
Internet Explorer Tools Menu

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:

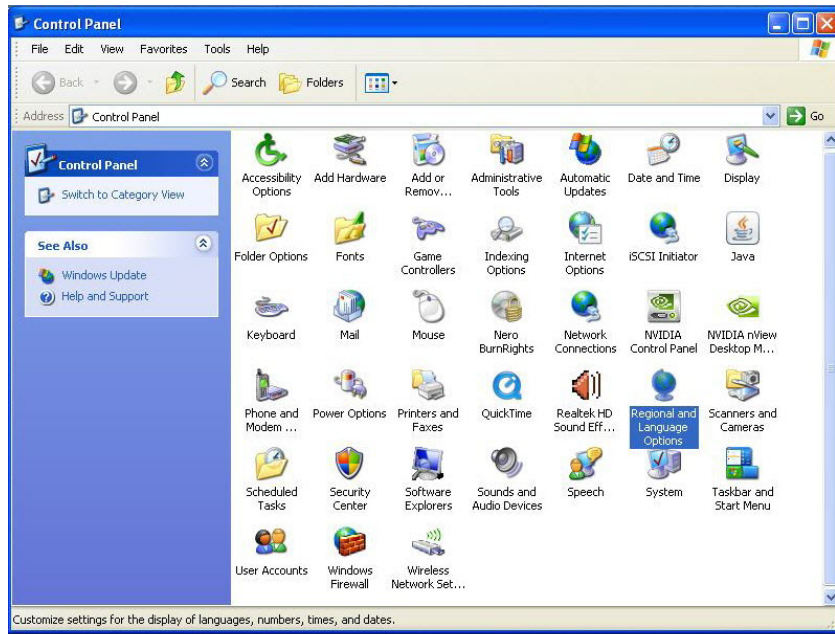
- Reviewing documents on a Windows XP PC
- Managing a background processing server
- Managing a web server

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.

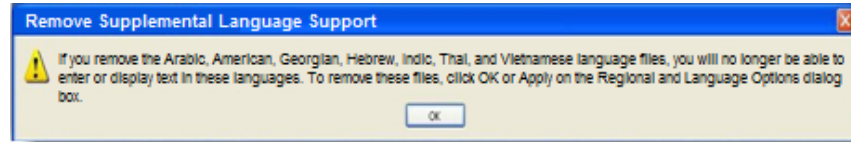


Languages Tab

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

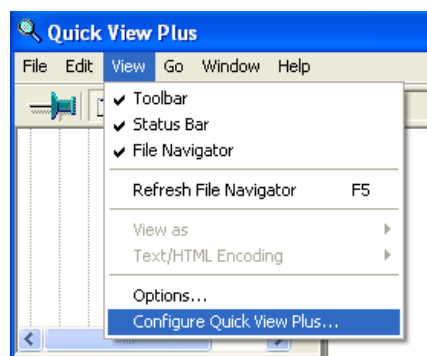
5. You will be prompted to insert the Windows CD-ROM or point to a network location where the files are located. After the files are installed, you must restart your computer. To remove the language files, deselect the **checkbox** beside the applicable collection and click **OK** and **Apply**.

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.

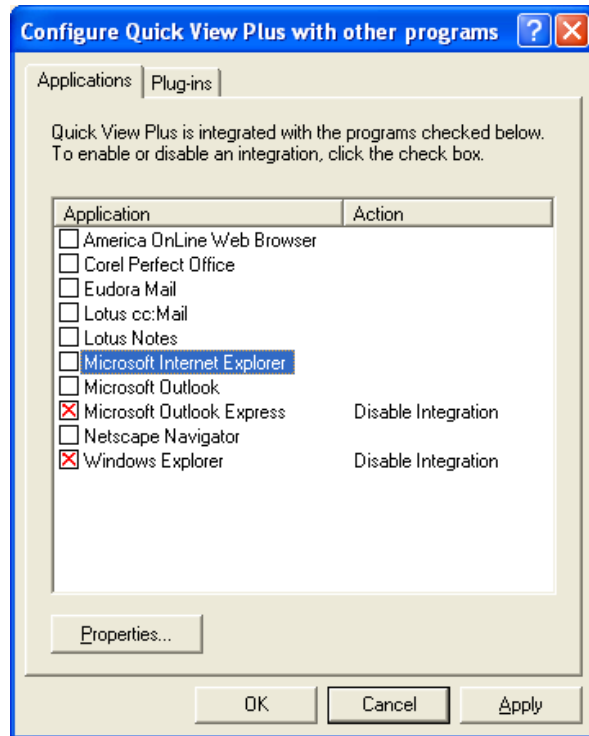
6.1 Configuring Quick View Plus

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.



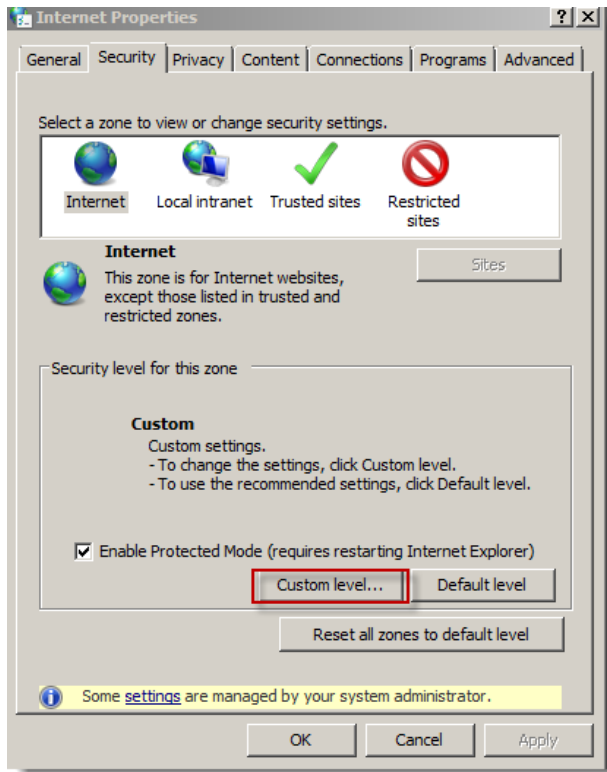
Applications Display

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.

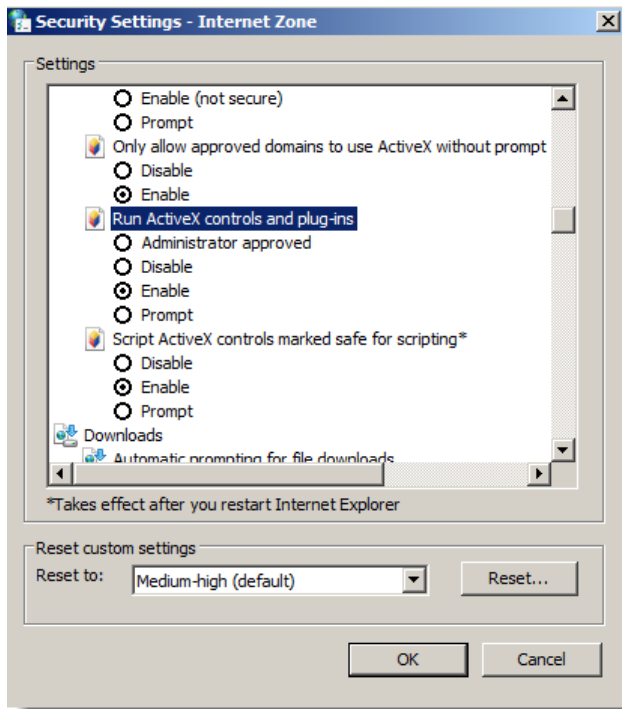
To set your custom levels, first click the **Custom level...** button inside your Internet Option | Security tab.



Custom Level Tab

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

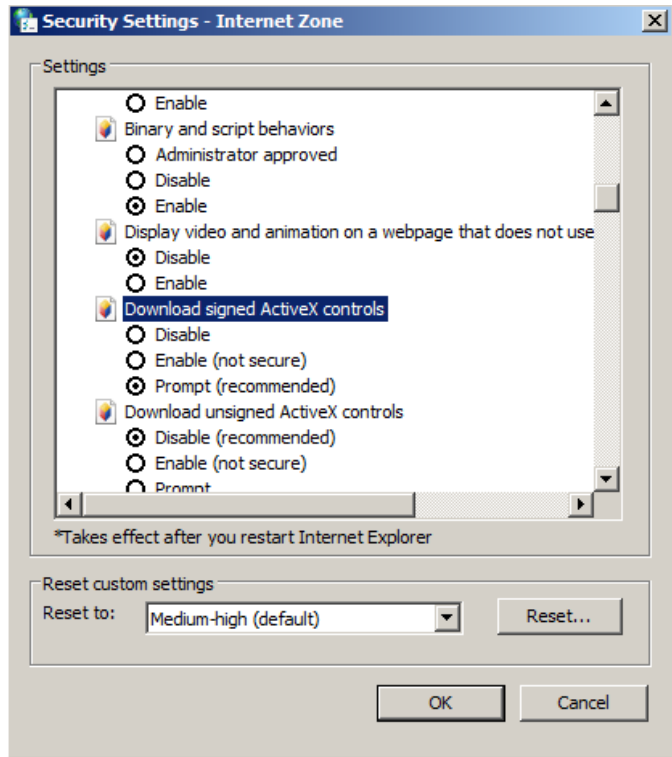
- **Run ActiveX controls and plug-ins**



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**

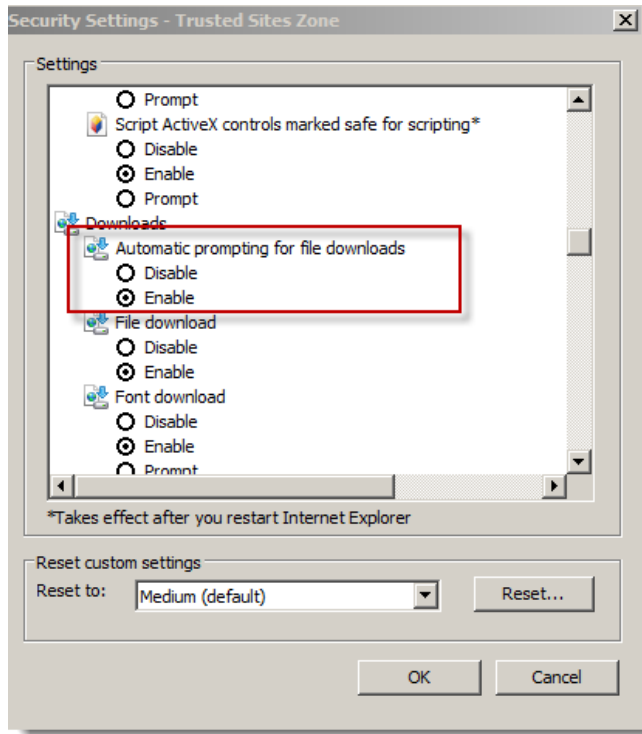


Download Signed ActiveX Controls

Note that failure to set properly 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 select **Enable** for **Automatic prompting for file downloads** as seen below.



File Downloads Display

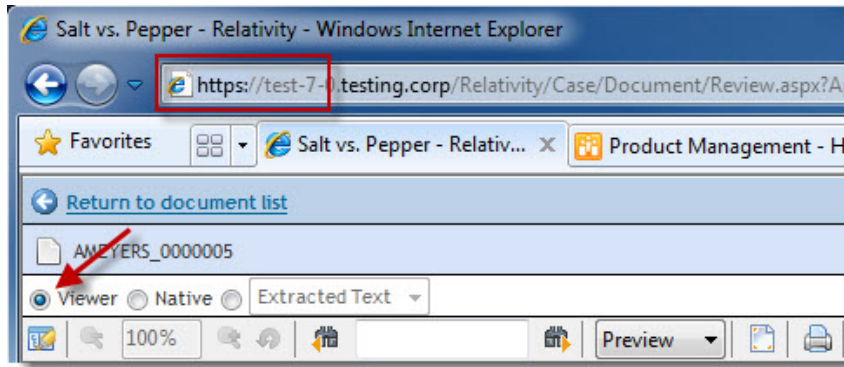


The **Automatic prompting for file downloads** security option applies to specific versions of Microsoft Internet Explorer. Internet Explorer 9 handles file downloads through the Internet Explorer Download Manager. Please refer to Microsoft for Internet Explorer 9 file download configuration options.

8 Appendix B: 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 indicated 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 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.

9 Proprietary Rights

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