Relativity®

Case Workspace Quick Reference Guide
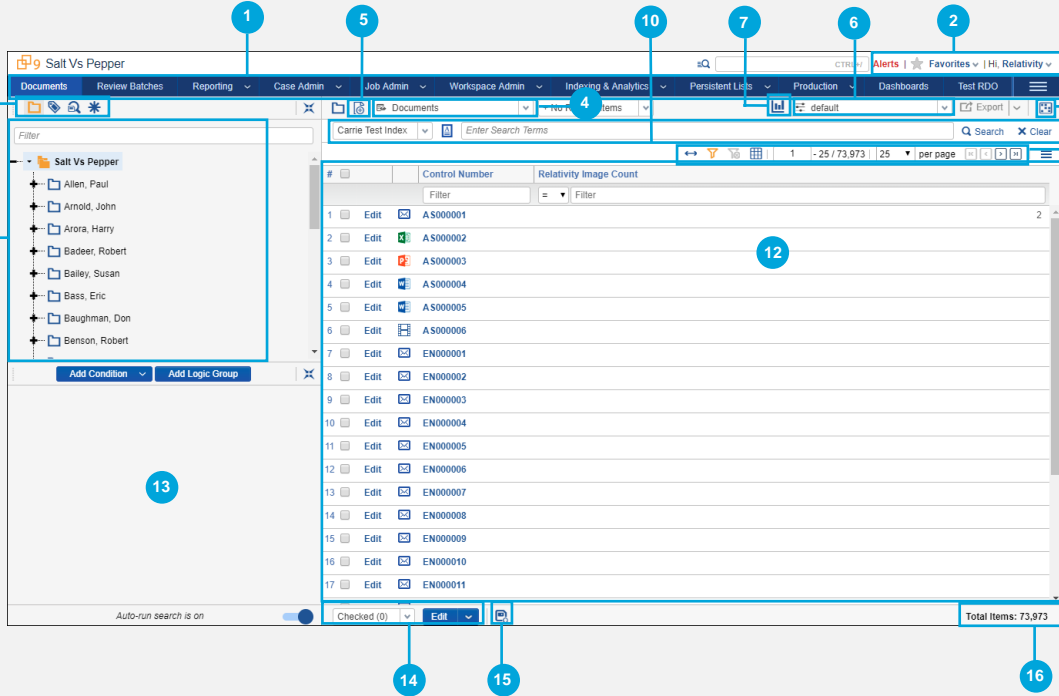
Case Workspace Areas		
1	Tab strip	Navigate between the different sections of your case.
2	User Settings / Navigation	Access alerts, your favorite, user drop-down options and settings, and quick nav to search tabs and workspaces.
3	Document browser menu	Controls whether the browser displays folders, tags, saved searches or clusters.
4	View bar	Controls which documents and fields are displayed in the document list.
5	New Document button	Upload a new document to your workspace.
6	Dashboard functions	Where you can save your current dashboard.
7	Add Widget button	Add a new Pivot or Cluster widget to the dashboard.
8	Document list controls	Controls how your documents are displayed and allows you to navigate through them.
9	Sampling button	Use sampling to create a randomized sample of the documents.
10	Search bar	Use the Search Bar to search documents for key terms.
11	Browser	Browse through documents using folders, saved searches or the field tree.
12	Document List	Central location for viewing and acting on your documents.
13	Search panel	Create and set search and filter conditions for your documents.
14	Mass operations bar	Options to take mass action on some or all documents in the document list.
15	Saved search button	Allows you to save your current search conditions on your list as a new saved search.
16	Total items	Displays the total number of documents in the set.
View Bar		
	View menu	Select a view or click the icons to edit or delete a document view.
	Related items menu	Select whether to display related items to the documents displayed (e.g., Family, Duplicates).
Document Browser Menu		
	Folders	Navigate the folder hierarchy for your workspace.
	Field Tree	Displays a tree of field selections.
	Saved Searches	Create a new saved search or access previously saved searches.
	Clusters	Shows the Relativity Analytics cluster hierarchy.
Document List Controls		
	Reset column sizes	To return to the original settings for the columns, click the Reset Column Sizes icon.
	Show / Hide Filters	Click the blue icon to show filters for columns in the item list. Click the orange icon to hide them.
	Clear Filters	Click this icon to clear any filters that have been applied to the item list.
	Turn Grid Style On / Off	This shrinks the row padding and alternates row shading to make your data more compact and easier to read.
		Use these navigational controls to navigate the pages in the item list.