

Legal Technologies **US**

Printing and Saving Documents as PDFs in RelativityOne

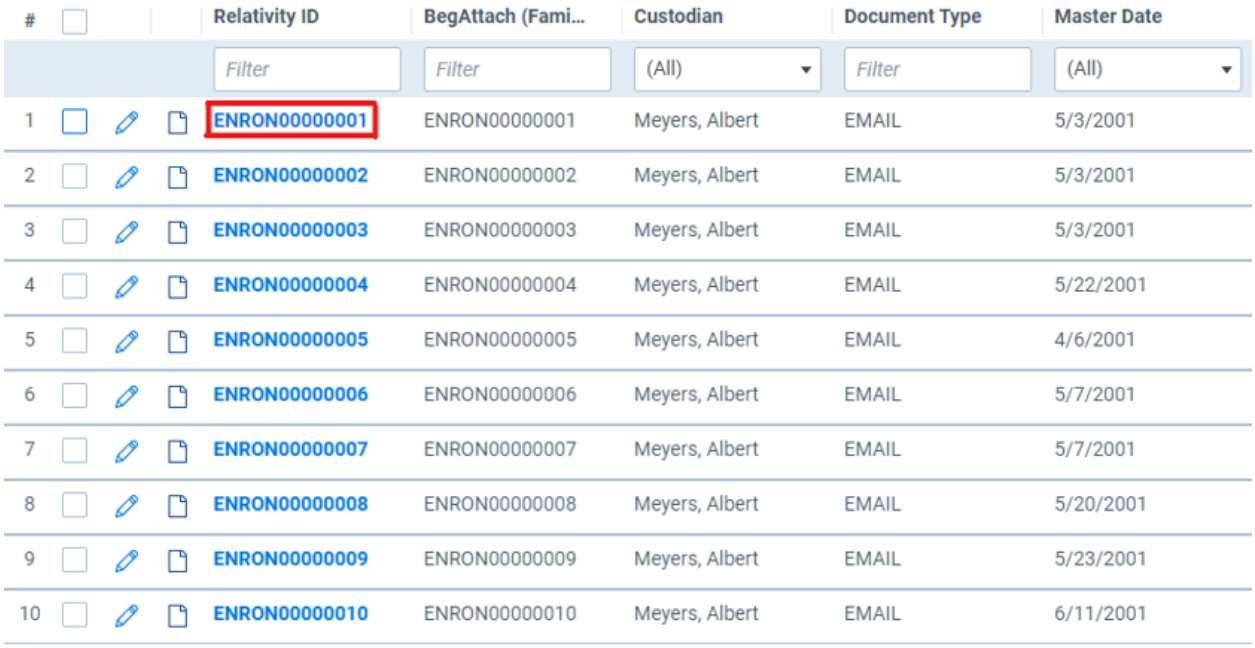
KLDiscovery™

Printing and Saving Documents as PDFs in RelativityOne

The following explains how to print and save documents as PDFs in RelativityOne.

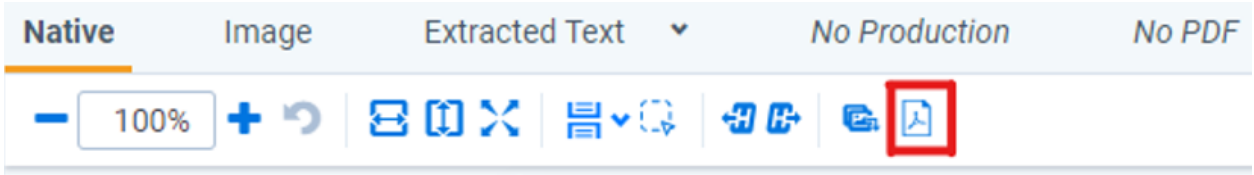
To save a document as a PDF

1. On the Documents page, locate the document you want to print and click its **Relativity ID**.

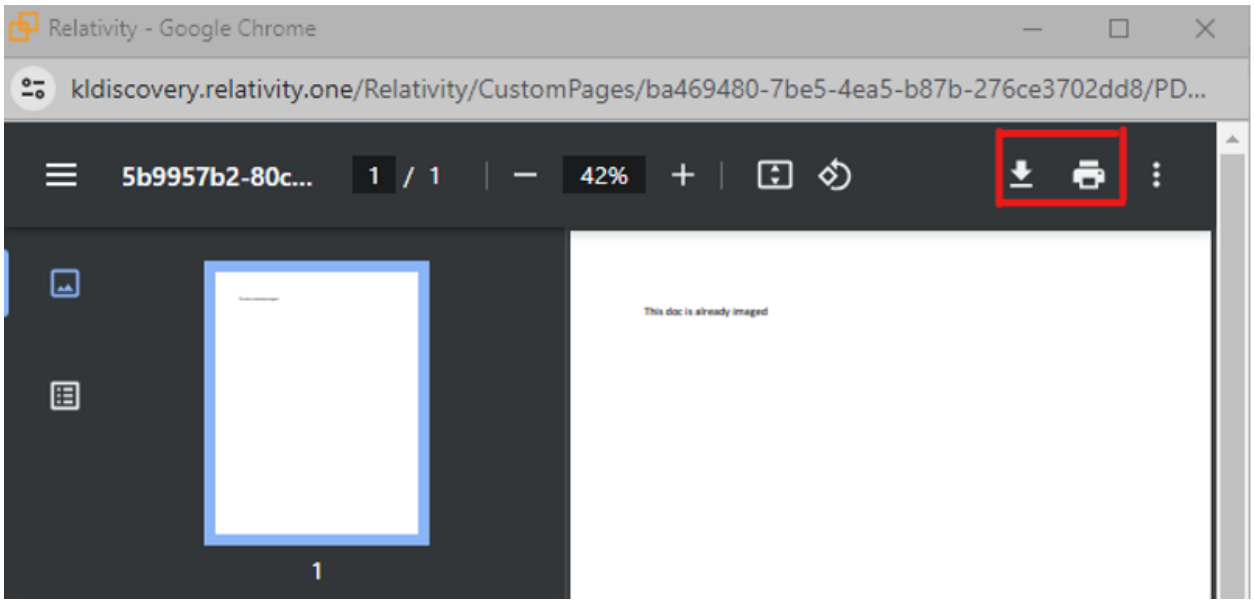


#	Relativity ID	BegAttach (Fami...	Custodian	Document Type	Master Date
	Filter	Filter	(All)	Filter	(All)
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2	ENRON00000002	ENRON00000002	Meyers, Albert	EMAIL	5/3/2001
3	ENRON00000003	ENRON00000003	Meyers, Albert	EMAIL	5/3/2001
4	ENRON00000004	ENRON00000004	Meyers, Albert	EMAIL	5/22/2001
5	ENRON00000005	ENRON00000005	Meyers, Albert	EMAIL	4/6/2001
6	ENRON00000006	ENRON00000006	Meyers, Albert	EMAIL	5/7/2001
7	ENRON00000007	ENRON00000007	Meyers, Albert	EMAIL	5/7/2001
8	ENRON00000008	ENRON00000008	Meyers, Albert	EMAIL	5/20/2001
9	ENRON00000009	ENRON00000009	Meyers, Albert	EMAIL	5/23/2001
10	ENRON00000010	ENRON00000010	Meyers, Albert	EMAIL	6/11/2001

2. On the Native page tool bar, click the Create PDF icon .



3. Choose how you want to create the pdf from the following:
   - *To download the pdf*, click .
   - *To print the pdf*, click .

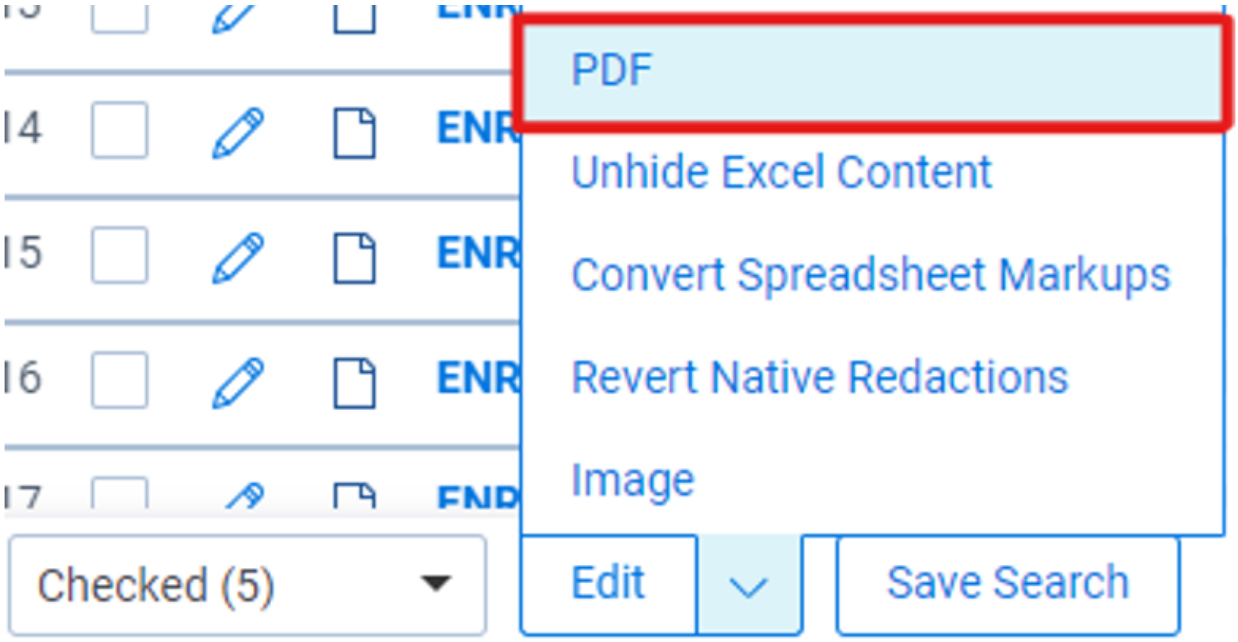


To save multiple documents as a PDF

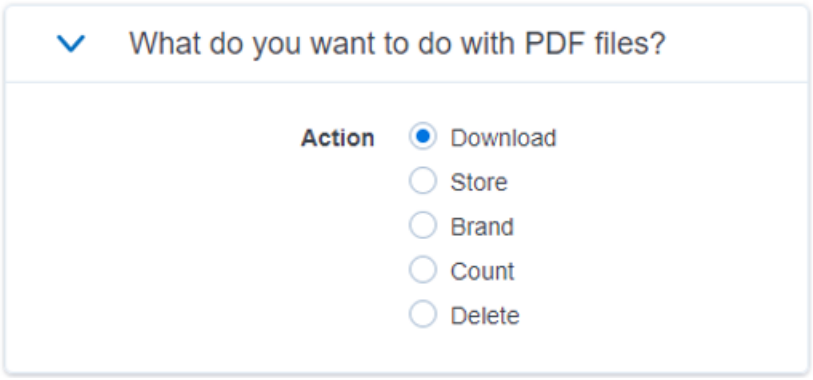
1. On the Documents page, locate and select the documents you want to save as a PDF.

#		Relativity ID	BegAttach (Fami...	Custodian	Document Type	Master Date
		Filter	Filter	(All)	Filter	(All)
1	☑	ENRON00000001	ENRON00000001	Meyers, Albert	EMAIL	5/3/2001
2	☑	ENRON00000002	ENRON00000002	Meyers, Albert	EMAIL	5/3/2001
3	☑	ENRON00000003	ENRON00000003	Meyers, Albert	EMAIL	5/3/2001
4	☑	ENRON00000004	ENRON00000004	Meyers, Albert	EMAIL	5/22/2001
5	☑	ENRON00000005	ENRON00000005	Meyers, Albert	EMAIL	4/6/2001
6	☐	ENRON00000006	ENRON00000006	Meyers, Albert	EMAIL	5/7/2001
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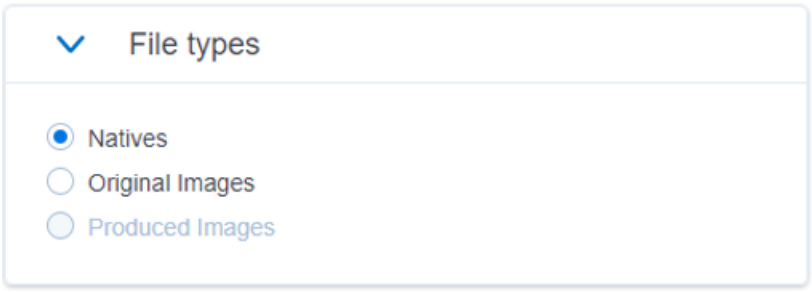
2. In the footer of the Documents page, click the mass operations button and select **PDF**.



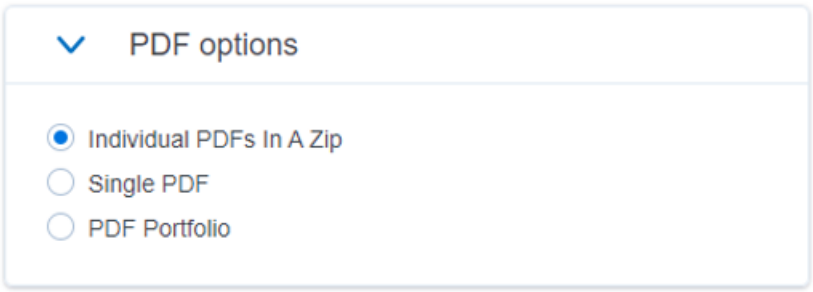
3. On the Download PDF for (#) Documents dialog box, select the **Action** you want performed.The contents of Download PDF for (#) Documents dialog box adjusts based on the action selected.



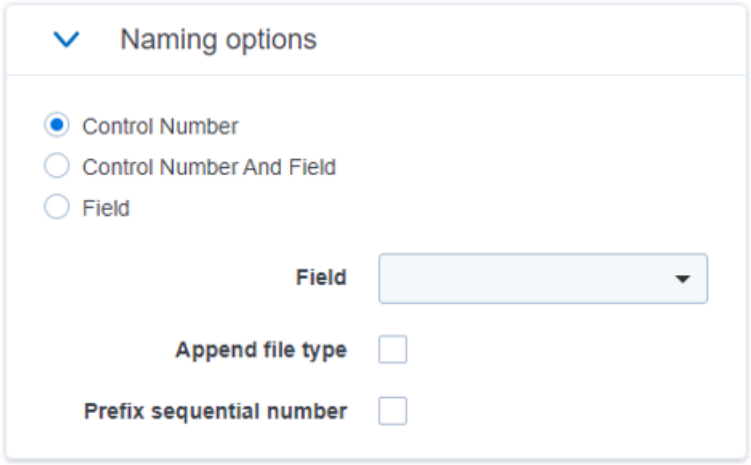
4. In the **File types** section, select from the following:
   - **Natives**: Saves the native of the documents
   - **Original Image**s: Saves non-produced versions of the documents
   - **Produced Images**: Saves produced versions of the documents.
     - **Include original images for documents that haven't been produced**: If selected, this will creates PDF versions from the images of records that haven't been produced.
     - **Modify Production Order**: Creates a list of productions in your workspace. From here, you can select which version of the document to be included in the PDF set. There is a trumping order for documents with multiple images. The save job first looks at the production set at the top of the list. If the document is included in this production, that version is saved. If not, the save job checks if the document is in the next production. If it is, that version is saved. If not, it moves to the next production and so on. One version per document is saved.



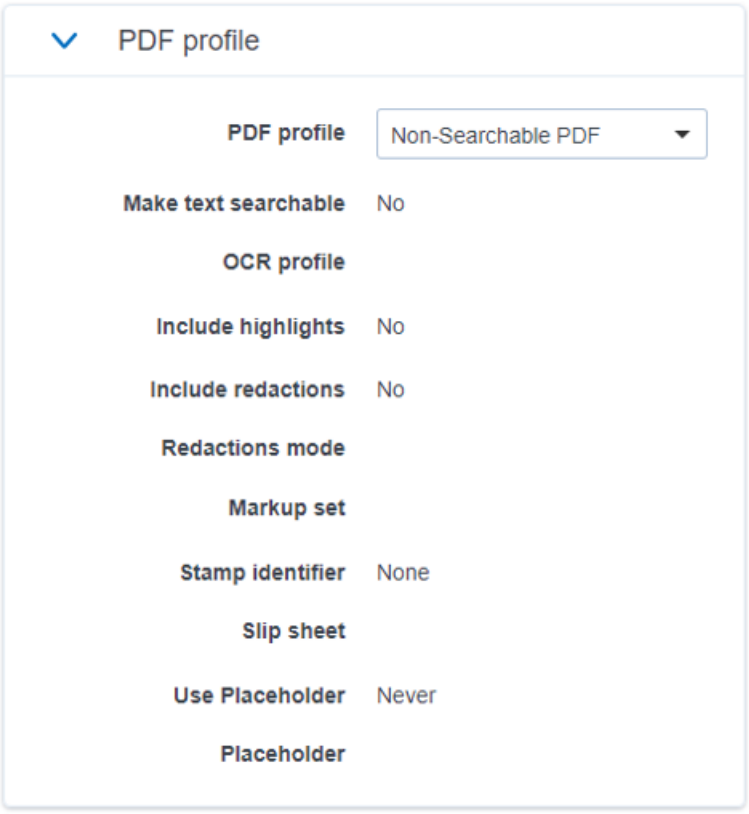
5. In the **PDF Options** section, select from the following:
   - **Individual PDFs In A Zip**: Saves the documents as a Zip file with multiple PDFs
   - **Single PDF**: Saves the documents as a PDF file with all documents.
   - **PDF Portfolio**: Saves the documents as a PDF Portfolio with all documents



6. In the **Naming Options** section, select from the following:
   - **Control Number**: Select to name the download after the original document's control number.
   - **Control Number And Field**: Select to add the value of a field to the record's control number (example: `1234567_Responsive`).
   - **Field**: Select any fixed-length or long text field available in the workspace to use as the name for the PDF.
   - **Append File Type**: Select to add `_native`, `_image`, or `_production` at the end of the file name based on the type of documents used to create the PDF.
   - **Prefix Sequential Number**: Select to add a number as a prefix in the name. This prefix is based off the record's location in the sorted document list (example: `01_Record.pdf`, `02_Record.pdf`, `03_Record.pdf`).



7. In the **PDF Profile** section, select from the following:
   - **PDF Profile**: Select from the following:
     - Non-Searchable PDF
     - Non-Searchable PDF/Branded ID
     - Searchable PDF
     - Searchable PDF/Branded ID
   - **Include Highlights**: Prints any existing highlighting on the PDF image.
   - **Include Redactions**: Prints any redactions on the PDF image.
     - **Normal**: Includes redactions as they currently appear on the document.
     - **Transparent**: Includes redactions as transparent on the document



8. Click **Download**.

Once downloaded, the files are located in the default download folder for your workspace.

Note: *When you mass save a group of documents to PDF, the documents will retain their sort order based on the order in which they appear within your document list.*

Note: *If you have any further questions, please contact the TechQ department at techq@kldiscovery.com or your Project Manager.*