

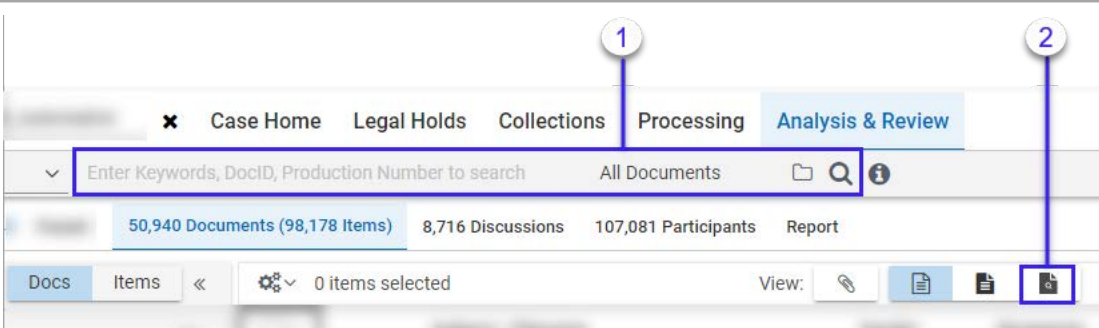
eDiscovery Platform User Interface Navigation Quick Reference Card

Review Mode

Note: Certain documents in Review Mode may be unavailable if they have not been designated for review.

Getting started

1. Run a search query or open your review folder.
2. Open Review Mode. (In 8.0: also expand the collapsed filter pane)
3. View documents in Native/Image View.
4. Undock the Tag and Related Items windows.





Review Tips & Tricks

Expand and Collapse the Tag Decision Tree

You can open the entire decision tree by clicking the + option.  

Expand and Collapse the Filters section and left navigation bar

Use the buttons with arrows to collapse or expand the left navigation bar or Filters bar.  

Use Hit Highlighting

Use the arrow buttons or keyboard shortcuts to display the next hit.



- Arrow buttons move to the next, or previous hit.
- Arrows surrounding the document number field move to the next, or previous document.

View Attachments before clicking Next Item

Choose your View mode deliberately:

Text Mode - Faster display and multicolor highlighting

Native Mode - Faster review by displaying messages in full, native fidelity.

Sort Records Chronologically

Before entering Review Mode, you can sort your records by date.

Keyboard Shortcuts:

- F11 hides browser toolbar
- ALT+N displays next document
- ALT+P displays previous document
- ALT+T displays thumbnails in Native views
- ALT + ↓ displays next hit
- ALT + ↑ displays previous hit

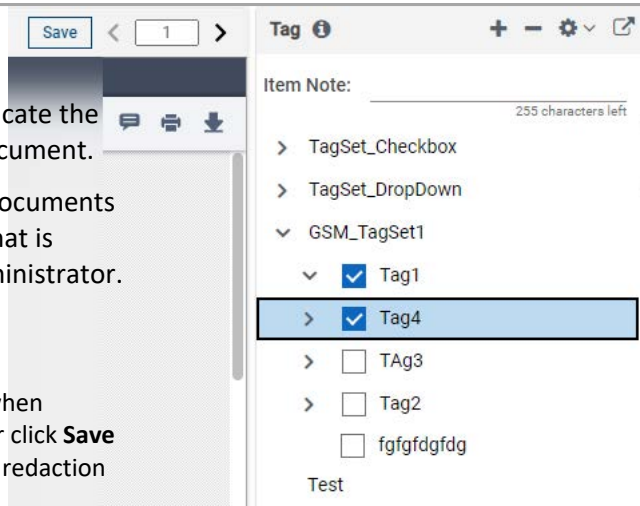
Tagging Documents

Tags are a simple way to indicate the status and relevance of a document.

Tags enable you to classify documents based on selection criteria that is predefined by your case administrator.

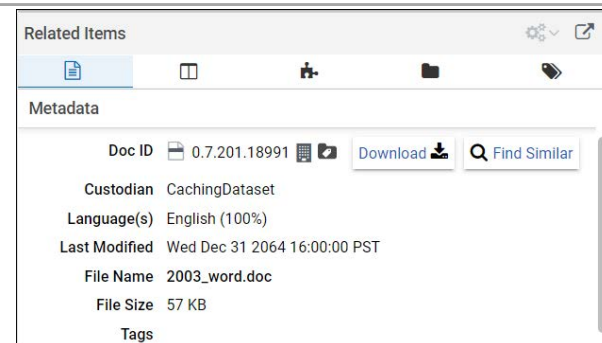
To tag a document:

1. Select a tag.
2. Tags will be auto-saved when navigating to next item or click **Save** at the top-right corner of redaction or annotation interface.



Viewing Related Items

The Related Items window accelerates review by providing a single place to view everything related to a document.



Options like Metadata, Attachments, Discussions, Similar Docs, Folders, Tag History, Analyze, and Custom Attributes are all accessible from Related Items enabling you to view, tag, and bulk tag without changing modes.

Redaction Mode

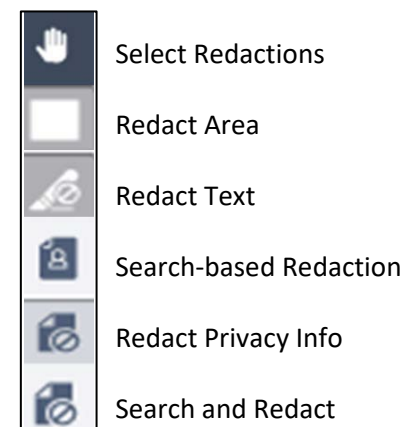
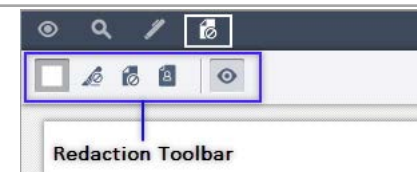
Use **Configure visible tag sets** icon to specify how you want to advance through the reviewable items, the options are:

- Hide or unhide tag sets
- Auto-Advance: Move to next document as soon as a tag is selected
- Select or unselect the skipping of attachments and Embeddings
- Select or unselect the skipping of non-matching items

Note: Redaction Mode may be unavailable for certain documents if they have not been designated for review.

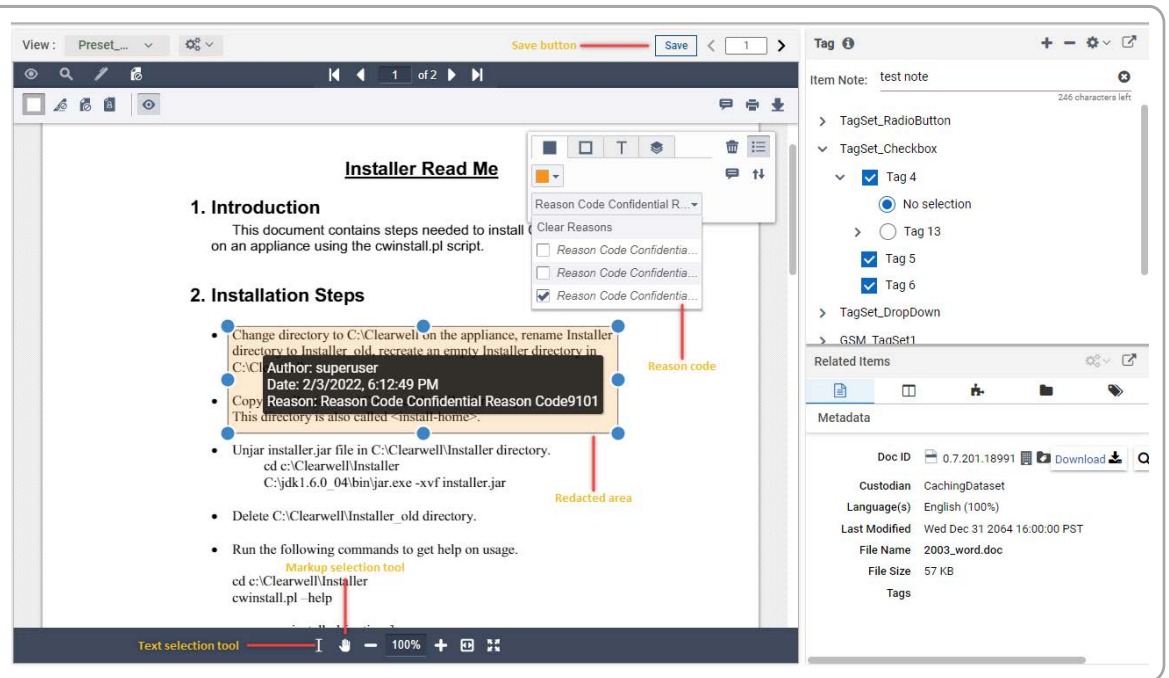
Getting Started

1. Open Redaction Mode and locate the redaction set. (View: **Redaction/Annotation** > select redaction set name.)
2. If using **Preset Redaction Codes**, select the redaction set the Case Admin has set up with presets (see page 4).
3. Redact the document using the Redaction drawing tools.
4. Choose one or more redaction reason codes in the quick access menu.
5. Use the Thumbnail and Verification views to review your redactions.
6. Produce the document to burn in your redactions.



Keyboard shortcuts

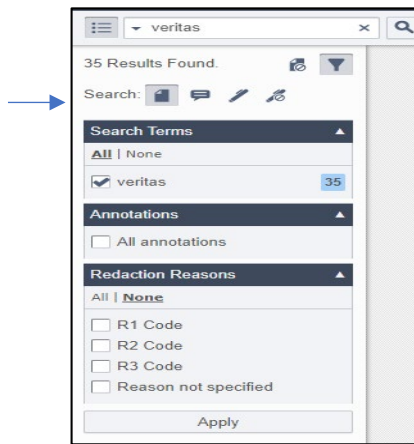
Alt + F	Full Screen toggle
Ctrl + Shift + C	View Comment
Page Down	Go to Next page
Page Up	Go to Previous page
Alt + V	Go to View tab
Alt + A	Go to Annotation Tab
Alt + R	Got to Redact Tab
Ctrl + F	Search in Native Viewer



Verifying Redactions

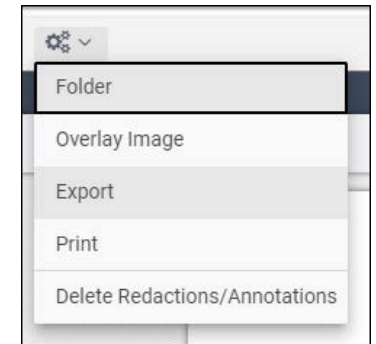
! Use thumbnail view to quickly see what has been redacted within long documents. Pages with redactions have black blocks on redacted area.

✓ Verify redaction accuracy by stepping through documents or searching based on case-specific criteria.



Redaction Tips and Tricks

1. For a faster redaction session, cache the review set first. If caching is not done, auto-cache occurs in the background for the next five items.
2. Redact in full screen view to see more of the document.
3. Redactions in different colors can be done for area redactions. Only black color is available for text redactions.



Annotating Documents

Reviewers can also add annotations to documents.

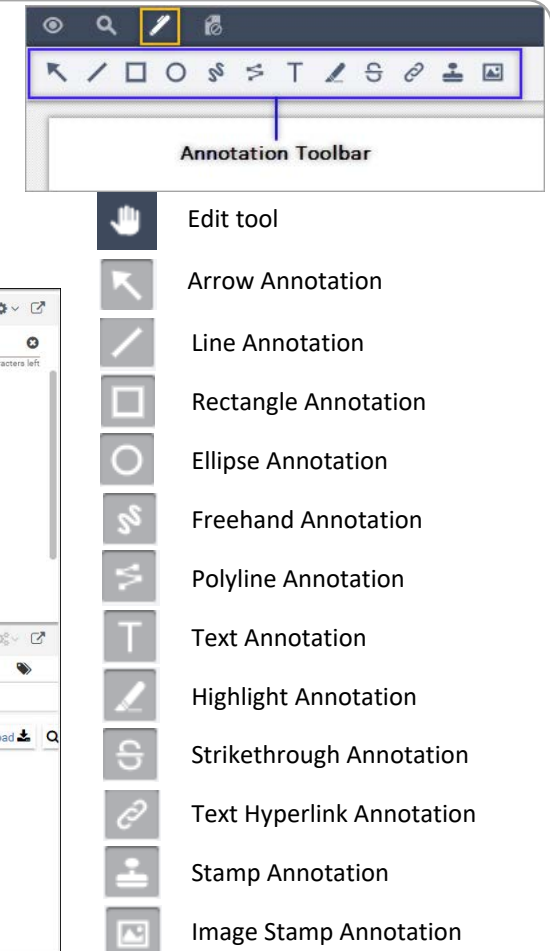
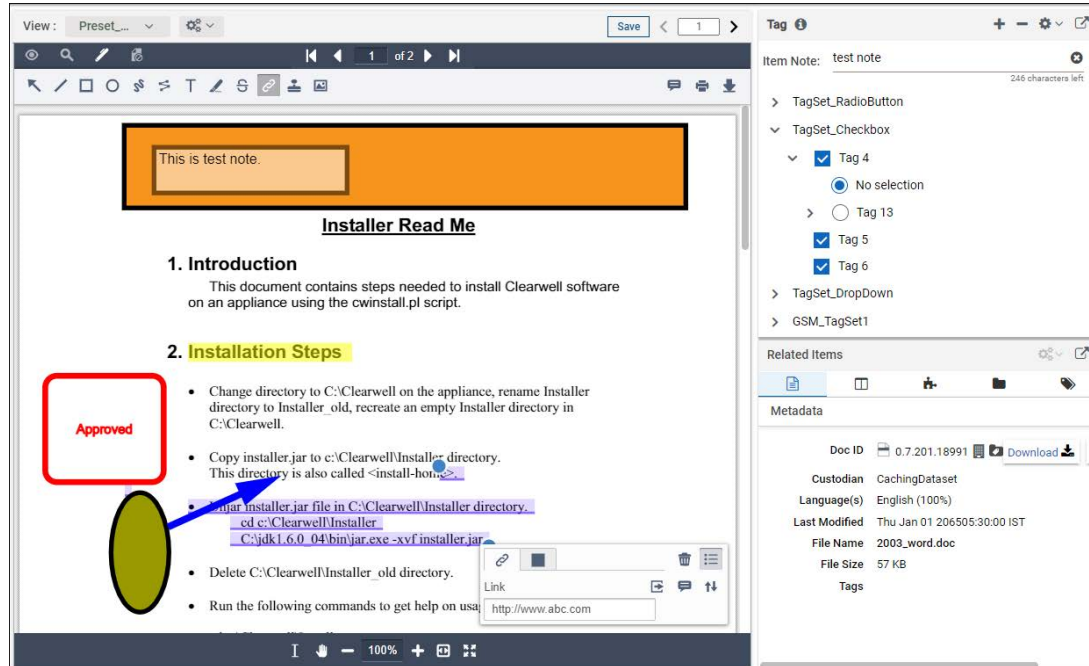
Annotations appear on produced documents, so messages, PDFs, or MS Office files can be produced with annotations that include text comments, added images, lines and arrows, and strikethroughs.

Documents with annotations are tagged with the system default Redacted tag.

Note: After production export, the annotated documents show the annotations only when viewed in image view.

Getting Started

1. Open Redaction Mode and locate the redaction set (View: **Redaction/Annotation** > select redaction set name.) Select the redaction set with the documents you want to annotate. →
2. Choose **Annotate**. Redaction Mode comes up as Redact by default.
3. Choose from the tools in the annotation bar to add your annotations.
4. Choose one or more redaction reason codes in the quick access menu.



Preset Reason Codes

Previously free text was the only option for applying reasons to redactions.

The Case Administrator can now also define preset reason codes. Reviewers are now able to consistently apply preset codes to redactions, and documents can be searched reliably using the tags for the preset codes.

Getting Started

Case Administrator:

Before Reviewers start redacting, the Case Admin needs to create a redaction set with preset redaction reason codes. See "Creating Redaction Set with Preset Codes" on this page.

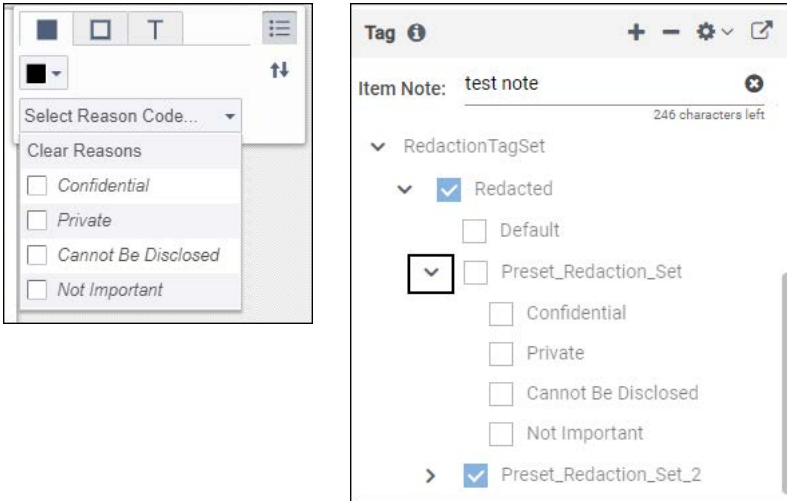
Case Reviewers:

Working in the redaction set with Preset Reason Codes the Case Admin has created, you can use the redaction tools as described on page 2. For your redactions, select a reason code from the available choices. See "Using Preset Reason Codes" on page 5.

General Users:

Filter using the preset reason code tags, run advanced search to find items that have the specific preset reason code tags. Tag information also appears in the export XML file.

Note: The UI has a limitation in displaying the Reason Codes in the pulldown area. Only the first 24 characters are displayed for the reviewers. However, the entire description is used to tag the redaction.

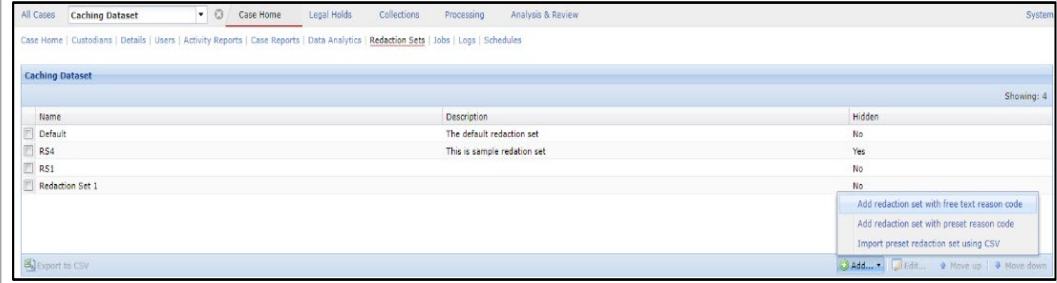


Creating a Redaction Set with Preset Codes

Case Administrator

Select the case.

From **Case Home > Redaction Sets**, in 8.3 CHF1 the case admin must choose between free text reason codes (previously the only option) or preset reason codes. For preset reason codes, choose the third option.



Note: Though the preset reason codes cannot be edited or removed, the redaction set name and description continue to be editable.

Additionally, you can hide and unhide existing redaction sets using the **Edit** button.



Using Preset Reason Codes

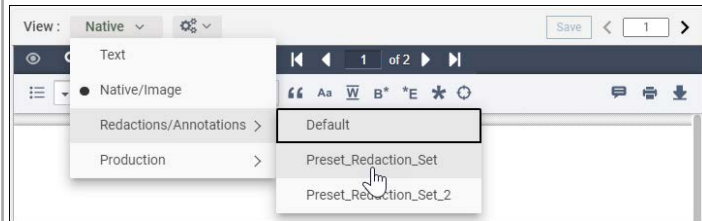
Case Reviewers

Case reviewers can apply the preset reason codes to redaction markups.

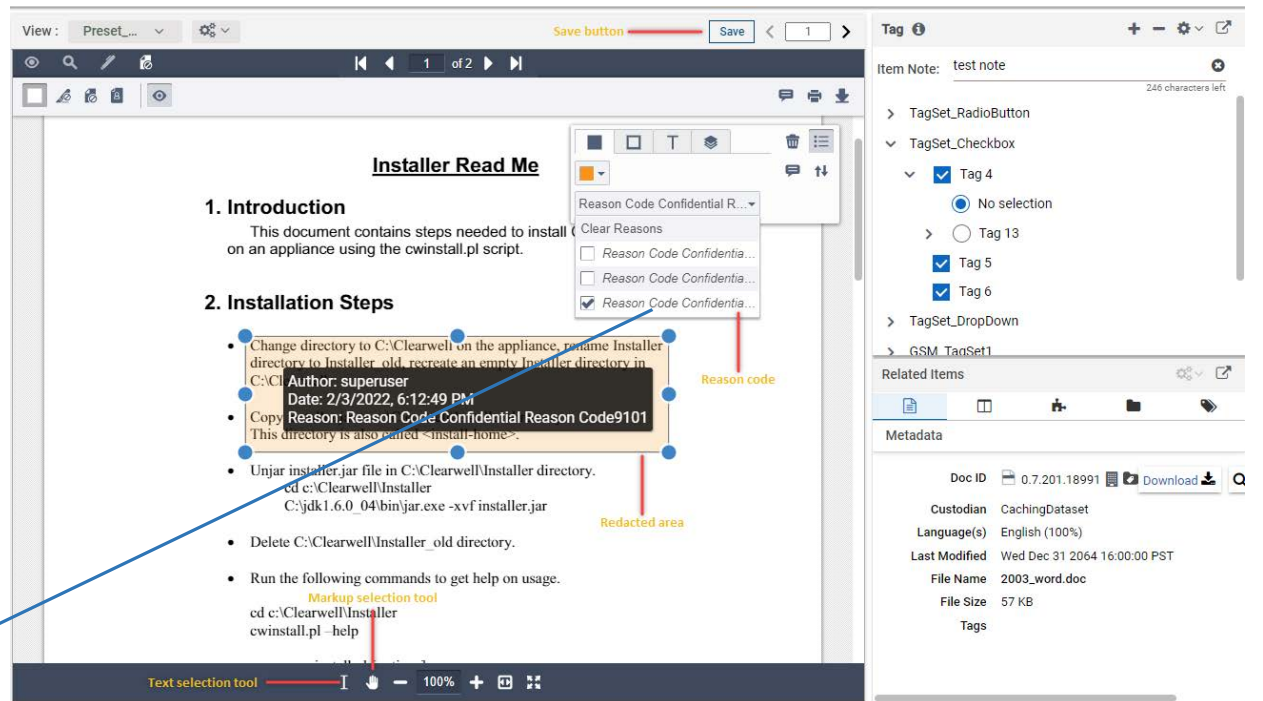
Select the case, then go to **Analysis & Review**.

In **Review** mode, change the View to Redaction/Annotation.

Choose the redaction set that the Case Admin has created with the preset reason codes.



As you redact, choose from the preset codes to identify the reason for redaction.



Filter/Search by Reason Code Tags

Users can filter or search documents based on the preset reason codes.

To filter, navigate to **Filters > Tag > RedactionTagSet > Redacted > 'Redaction Set Name' > 'Redaction Reasons'**.

Preset Reason Code Tags also appear in the Export XML.

To search, from **Advanced** search, enable the **Tags** panel and then under **Find items that have**, select tags under **RedactionTagSet > Redacted > 'Redaction Set Name' > 'Redaction Reasons'**.

