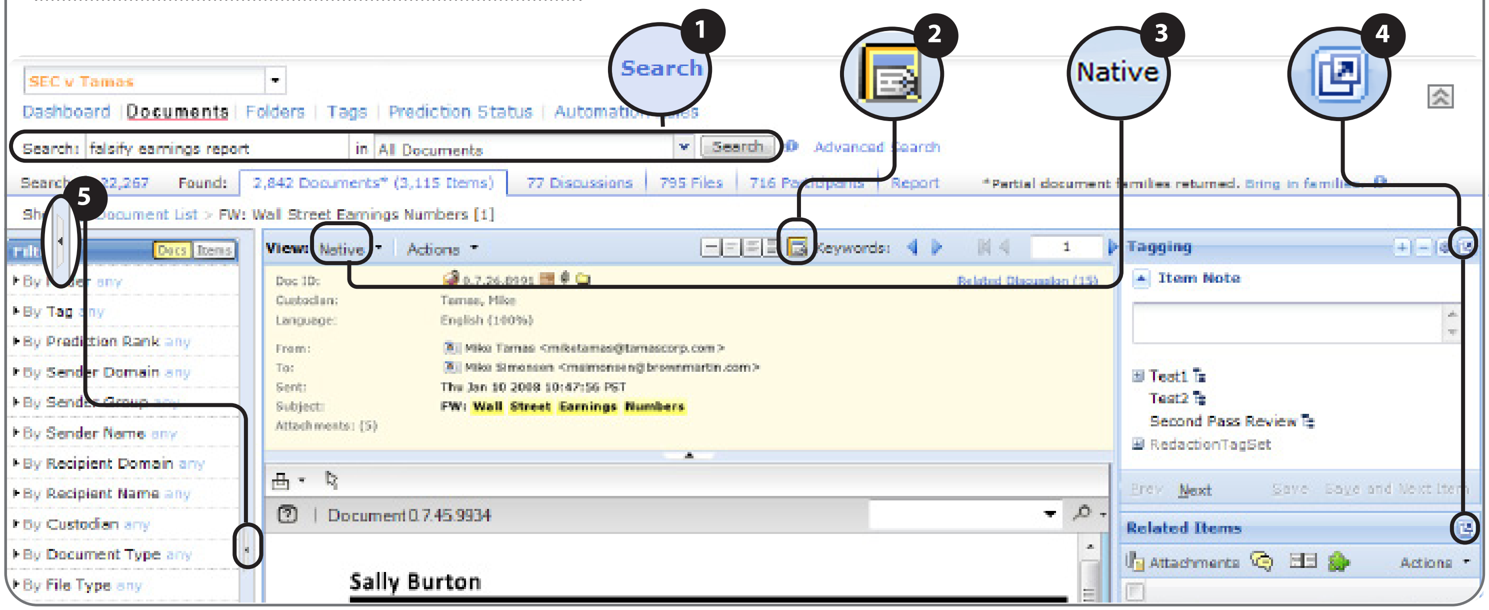
Review Mode

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

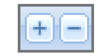
Getting Started

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 Tagging & Related Items windows.
5. Collapse the filter pane.



Review Tips & Tricks

Expand & Collapse the Tag Decision Tree



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

Expand & Collapse the metadata section and top navigation bar

Use the buttons with arrows to change the viewable area of items.

Use Hit Highlighting

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

- Circle 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 Document

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:

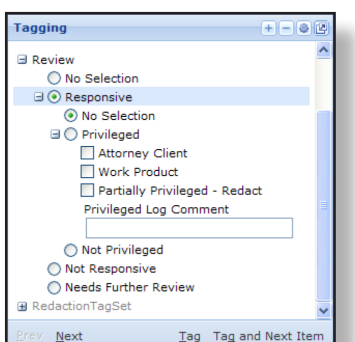
F11 hides browser toolbar
ALT+N displays next document
ALT+P displays previous document
ALT+T saves marked tags
ALT ↓ displays next hit
ALT ↑ displays previous hit

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 predefined by your case administrator.

To tag a document:

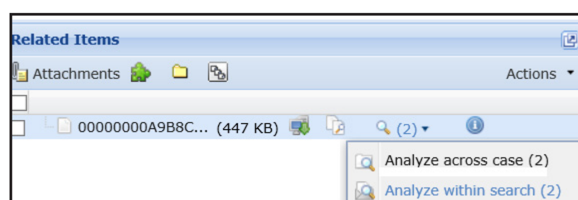
Select a tag.
Click the Tag button to save the selection.



Viewing Related Items

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

Options like 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.



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Redaction Mode

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.) If using **Preset Redaction Codes**, select the redaction set the Case Admin has set up with presets (see page 4).

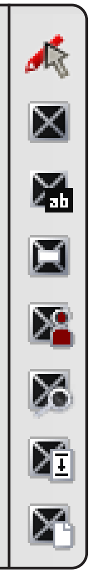
2. Redact the document using the Redaction drawing tools.

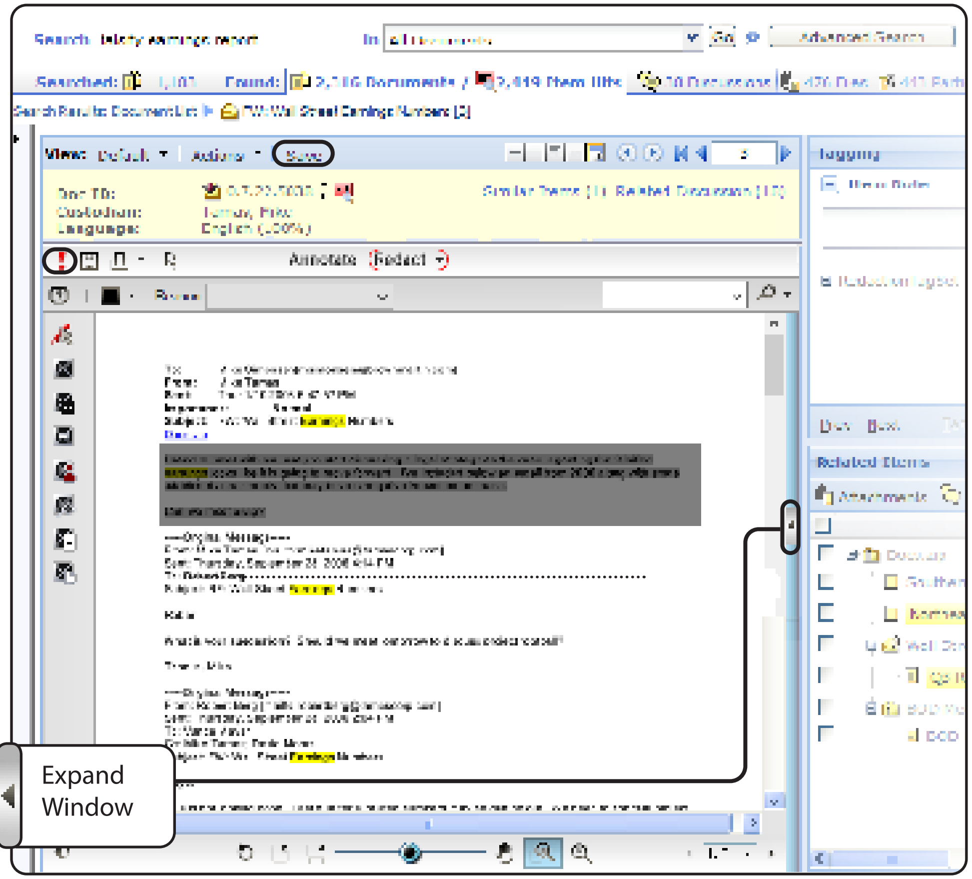
3. Save your redactions.

4. Use the Thumbnail & Verification views to review your redactions.

5. Produce the document to burn in your redactions.

Edit Tool
Select Redactions
Basic Tools
Redact Area
Redact Text
Allow Area
Search-based Redaction
Redact Privacy Data
Find and Redact
Bulk Redaction
Redact Section
Redact Page

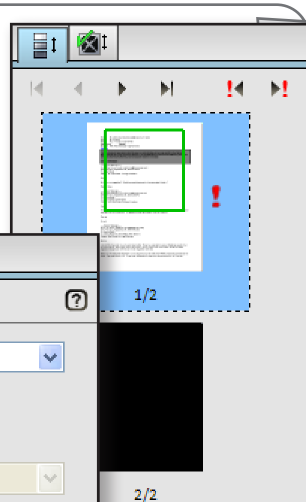




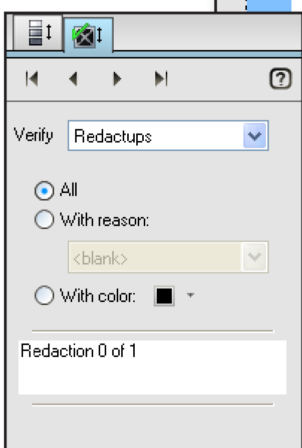
Expand Window

Verifying Redactions

Use thumbnail view to quickly see what has been redacted within long documents. Pages with redactions have an exclamation point and highlighted border.



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



Redaction Tips & Tricks

For a faster redaction session, cache the review set first.

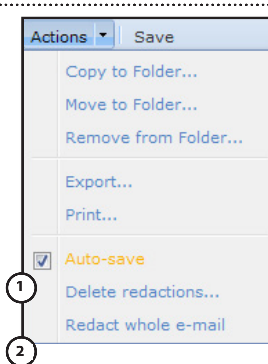
(1) The Auto-save feature automatically saves your redactions when you move to the next document.

You can redact an entire document two ways:

(2) **Redact whole document** (preferred).
Produced document is replaced with a single slipsheet.

Redact Pages
All pages print with black redaction fields. This option is available from the vertical Redaction tool bar.

Redactions should be either black or white.



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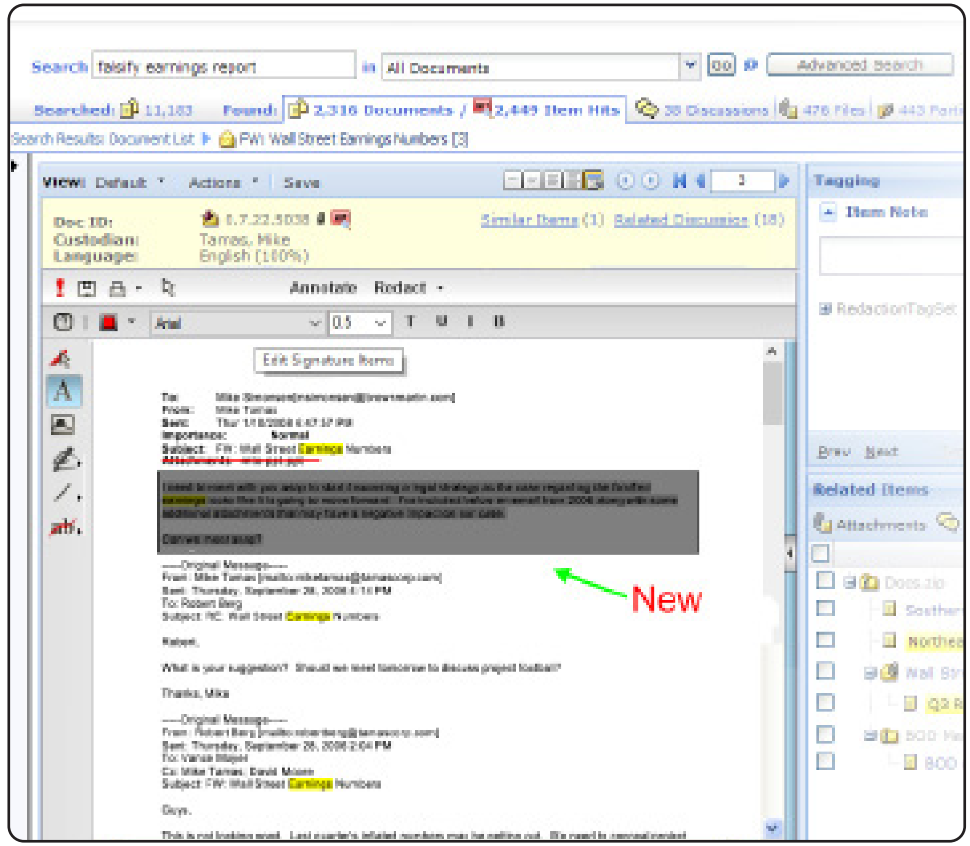
Annotating Documents

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. Save your annotations.

Edit Tool	
Basic Tools	
Text annotation	
Add an image	
Straight line/ arrow tool	
Strikethrough	

Annotations: Tips & Tricks

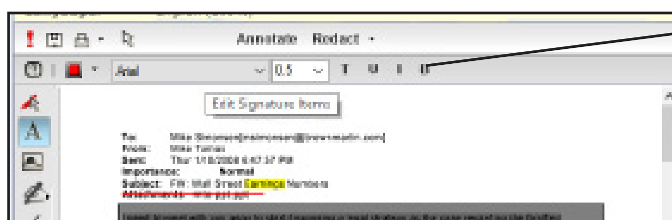
Within a document, you can use the **Annotate/Redact** toggle to switch between operations.

Tools with flyout arrows have options: change line style to include arrows, change strikethrough line styles.

Once annotated, the document can be reviewed by another reviewer, who can also add annotations.

Use colors and other formatting to differentiate reviewers.

Note: Select with the **Edit Tool** and press the **SHIFT** key to remove another user's redaction.



Selecting the text annotation, line, or strikethrough tool reveals colors and other formatting options.

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 will now be able to consistently apply preset codes to redactions, and documents can be searched reliably using the tags for the preset codes.

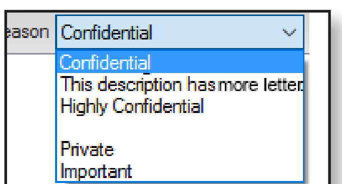
Getting Started

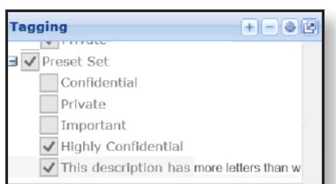
1. **Case Administrator:**
   Before Reviewers start redacting, the Case Admin needs to create a redaction set with preset redaction reason codes. See "Creating Redaction Set with Preset Codes" on this page.

2. **Case Reviewers**:
   Working in the redaction set with Preset Reason Codes the Case Admin has created, you will 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.

3. **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 Code description in the pulldown area. Only the first 24 characters will display for the reviewers. However, the entire description will be used to tag the redaction.
Consider that the users will need to choose between codes based on the first 24 characters.



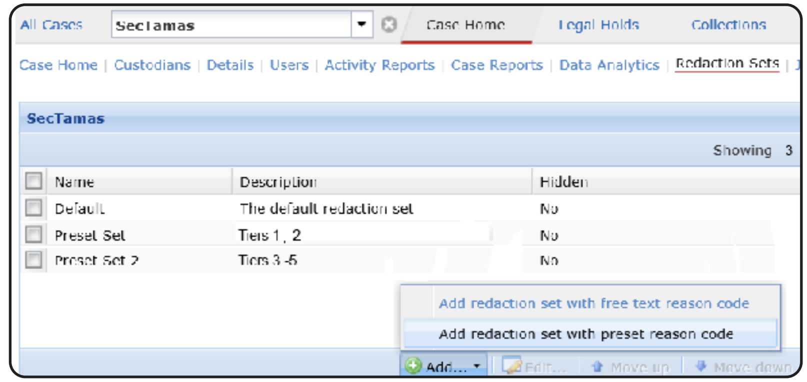


Creating a Redaction Set with Preset Codes

Case Administrator

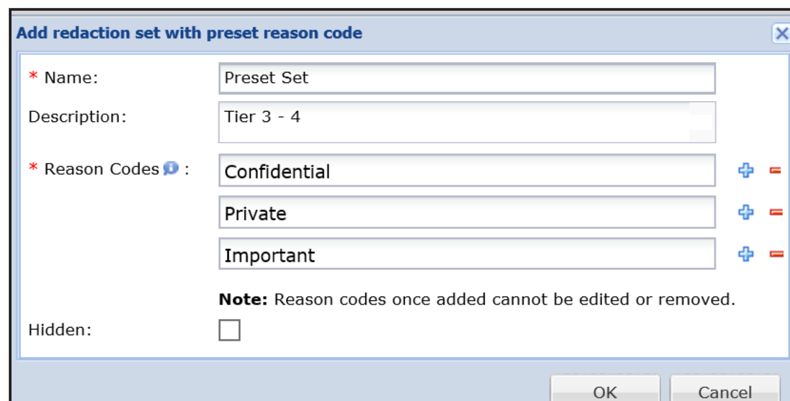
Select the case.

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 second option.



To create and save a redaction set, a **Name** and at least one **Reason Code** is required.

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.



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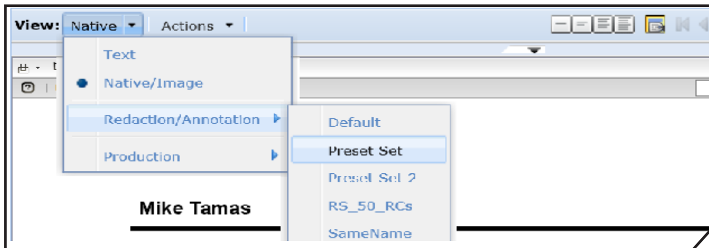
Using Preset Reason Codes

Case Reviewers

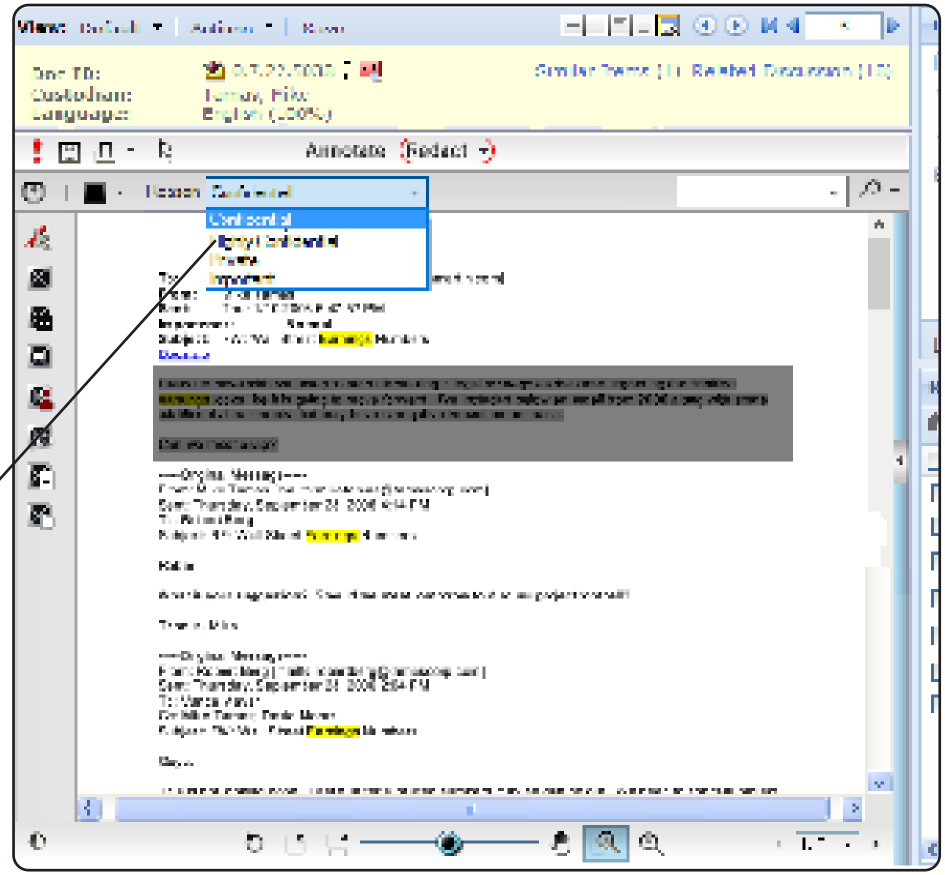
Case reviewers can apply the preset reason codes to redaction markups.

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.

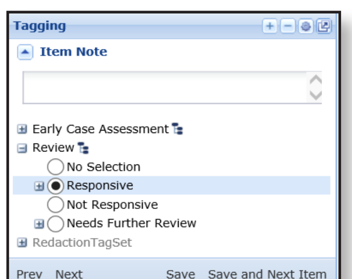


Filter/Search by Reason Code Tags

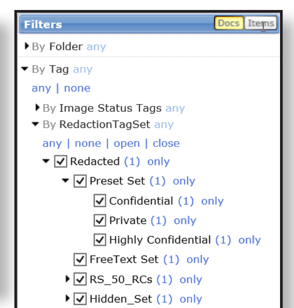
Users can filter or search documents based on the preset reason codes.

Preset Reason Code Tags will also appear in the Export XML.

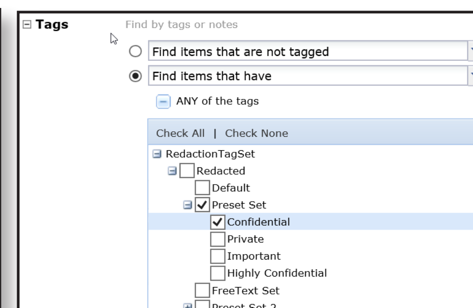
Tagging Panel



Tag Filters



Advanced Search



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