



NUIX DISCOVER BASICS

QUICK START GUIDE

Nuix Discover® 10.21 brings a new level of simplicity, ease of use, and efficiency to document review. The following pages walk through scenarios based on common tasks. These examples show the Nuix Discover features that make the interface easier to use and that add speed and accuracy to review tasks.

Note: The features described in this document are available to hosted and on-premises users. Hosted (also referred to as SaaS) users may also have access to more recent features that are not yet included in this document.

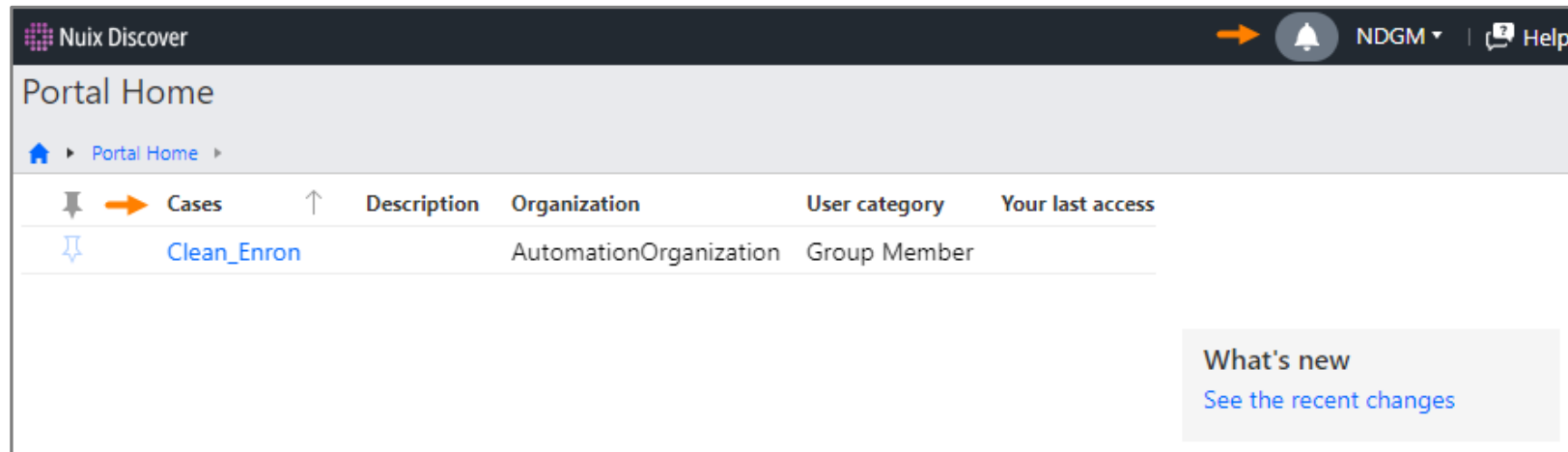
Note: Your administrator must enable and configure some features.

LOG IN AND SELECT A CASE

Follow the link that was provided by your administrator and log in to the application.

Note: If you bookmark the link to the application, use the address that was provided by your administrator or the address of the **Portal Home** page that appears after you log in.

On the **Portal Home** page, in the **Cases** column, click the name of a case.



Note: After you log in, the **Case Home** page typically appears. Your administrator may configure a different start page for your group, for example, the **Documents** or the **Transcripts** page.

Tips

- You can pin frequently accessed cases to the top of the list.
- To see notifications from your administrator, on the **Portal Home** page, click the **Notifications** bell.

CASE HOME PAGE

On the Case Home page, the Case Site Map allows you to access key features quickly.

The image displays two screenshots of the Nuix Discover Case Home page. The top screenshot shows the full dashboard with a 'Group leader' callout box. The bottom screenshot shows a 'sample view' for a 'Group member' with a callout box.

Group leader

Group member (sample view)

Case Home

Case Site Map

- My Assignments
- Review Dashboard
- Concept Cloud

REVIEW SETUP

- All Assignments
- My Assignments
- Phase Priorities
- Phases 7
- Teams 3
- Workflows 2

ANALYSIS

- Cubes 8
- Mines 4
- Populations 7
- Predictive Coding Template
- Predictive Models 2
- Review Dashboard
- Samples
- Search Terms
- Stop Concepts

CASE SETUP

- Binders 39
- Column Templates 12
- Conditional Templates 29
- Hierarchies 3
- Issues 8

MANAGE DOCUMENTS

- Deletion 96
- Export 37
- Hashes 25
- Imaging
- Levels

SECURITY

- Objects
- Users 75

What's new
See the recent changes

DOCUMENTS ADDED

- 8/4/2021 (6,950)
- 7/7/2021 (70)
- 6/10/2021 (1)
- 6/1/2021 (3)
- 5/31/2021 (69)
- All documents (293,251)

RESULTS HISTORY
You have no recent searches.

REVIEW SETUP

- My Assignments

ANALYSIS

- Cube 1
- Search Terms

What's new
See the recent changes

DOCUMENTS ADDED

- 8/4/2021 (6,950)
- 7/7/2021 (70)
- 6/10/2021 (1)
- 6/1/2021 (3)
- 5/31/2021 (69)
- All documents (293,251)

RESULTS HISTORY
You have no recent searches.

DOCUMENT HISTORY
You have no document history.

CASE HOME PAGE: USER INTERFACE ELEMENTS

The Case Home page includes some or all of the following items:

Navigation bar: This bar at the top includes the following items (from left to right):



- **Nux Discover logo:** Click the logo to navigate to the **Portal Home** page from any page in the case. You can access a different case from the **Portal Home** page.
- **Case name:** Click the case name to return to the Case Home page from any other page in the case.
- **Case Home menu:** Use this menu to access different areas of the application, such as the Documents page, the Search page, or the Review Setup page. The **Transcripts** option appears on this menu if you have permission to access transcripts that are loaded in the case. The remaining menu options appear if you have permission to access the associated pages.
- **Quick search box:** Type a word or phrase in this box to perform a quick search.
- **Quick search menu:** Use this menu to change the quick search options. The options that appear on this menu depend on your permissions.
- **Group name and menu:** If you belong to multiple groups, you can switch between groups that are listed on the menu.
- **User name and menu:** Hover over your user name to view details. To log out of the application, click Log out on the menu. You can also click the user name menu to set search preferences, reset your workspace to the default settings, access bookmarks set up by your administrator, or access a list of keyboard shortcuts.
- **Help button:** Click this button to search the online help. To open the online help, click the **Documentation** button. You may also see buttons to submit a support ticket (Ticketing) or contact customer support (Get Help).

Toolbar: This bar includes the following items:

- **Breadcrumb and breadcrumb menu:** Breadcrumbs allow you to track and navigate back to previous pages. Click the arrow next to the Home button to open the breadcrumb menu, which displays the same list of pages as the Case Home menu.
- **Browse:** Click this button to open the Documents page with a workspace that contains the **Browse** pane.
- **Search:** Click this button to create a new advanced search on the **Search** page.

Navigation pane: This pane is located on the left side of the page and allows you to access other pages in the application, for example, the **My Assignments** page or the **Review Dashboard** page.

Case Site Map: Allows you to access key features such as your assignments quickly. You can also access your results history and document history, and documents that were recently added to the case. If enabled, this page also includes a “What’s new” section. Follow the link to read about the latest features.

Information bar: The information bar at the bottom of every page contains copyright and version information.

CASE HOME PAGE: CONCEPT CLOUD

The **Concept Cloud** displays a word cloud of the concepts that were found in a specific document set. The larger the word, the more common the concept is. You can display concepts for all documents in the case, or for documents in a binder, issue, population, sample, or workflow or phase. Use the slider to hide common concepts and display concepts that are less common.

To view documents that contain a concept, click a word in the **Concept Cloud**. For example, if you click the word “commission” in the **Concept Cloud**, the application performs a search and displays your results on the **Documents** page.

The screenshot displays the 'Case Home' interface. On the left is a dark sidebar with navigation links: 'Case Site Map', 'My Assignments', 'Review Dashboard', and 'Concept Cloud'. The main area features a 'Document set' dropdown menu currently set to 'All documents in the case', and a slider control labeled 'Hide the top 151 concepts'. Below these controls is a word cloud of concepts. The most prominent words are 'Steve home', 'card CENTER', 'Richard', 'America', 'industry', 'comment net', 'Continental Resource', and 'Paul'. Other visible words include 'Yes', 'capital fees Base', 'estate LTD', 'Jones Lynn', 'Ray', 'Eric', 'Jun', 'Lee', 'letter', 'Brian', 'loss', 'Life', 'room', 'volatility paper', 'Heir', 'depth', 'thing', 'view', and 'Linda'.

DOCUMENTS PAGE OVERVIEW

On the **Documents** page, you can perform a variety of tasks.

To open the **Documents** page, perform a search for documents. Or, on the **Case Home** page, in the **Case Site Map**, click a link under **Documents Added, Results History, or Document History**.

DOCUMENTS ADDED	RESULTS HISTORY	DOCUMENT HISTORY
10/25/2018 (1)	"Binder - Shared" is "10,000 Docs" (10,000)	6/4/2019 (3)
10/4/2018 (1)	"Custodian ID" has a value (1)	5/22/2019 (8)
All documents (1,820,637)		

The application displays the **Documents** page with the default workspace.

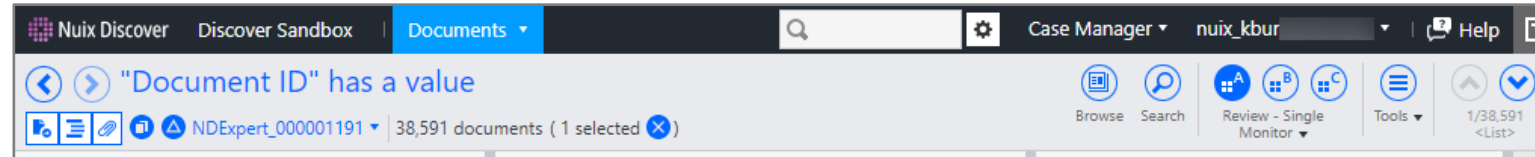
The screenshot shows the 'Documents' page interface. The top navigation bar includes a breadcrumb trail: '< > "Binder - Shared" is "All Documents"'. Below this, there are icons for 'Browse', 'Search', 'Espace de travail' (17), 'Tools', and a document count '1/37,059 <List>'. The main content area is divided into three sections:

- Left Sidebar:** Contains navigation options: Find, Hierarchies, Assignments, Quick Codes, Search Term Families, Concepts, Selected Concepts, and Organizations.
- Center List:** A table with columns 'Document ID' and 'Comment'. The first row is selected and highlighted in blue. The list contains several document IDs starting with 'NDExpert_000001191'.
- Right Panel:** Shows details for the selected document. It includes a 'Layout' dropdown, 'Coding' options, and a table with the following data:

Name	Value
Document ID	NDExpert_000001191
Creation Date	1/14/2020
Description	TAG 25883
Document Date	7/1/2001
Document Type	Microsoft Outlook Note

DOCUMENTS PAGE: USER INTERFACE ELEMENTS

The **Documents** page includes some or all of the following items on the toolbar (from left to right):



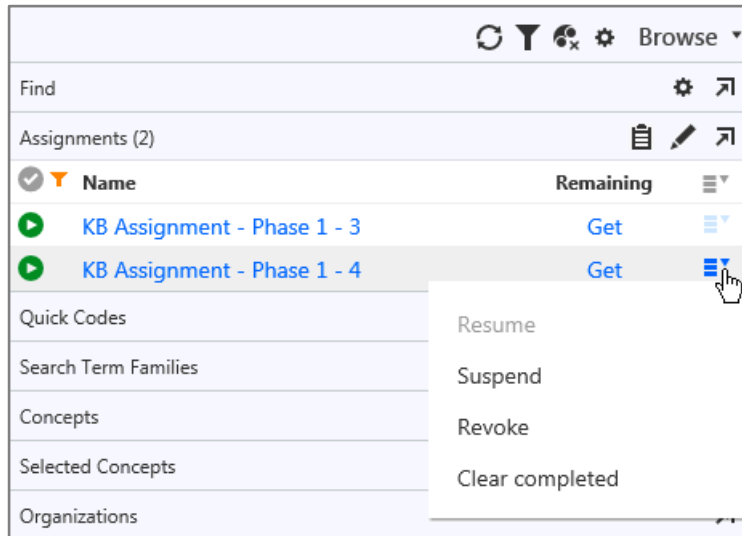
- **Search results arrows:** Use the arrows on the left to quickly browse through search results.
- **Search description:** Click the description of the search results to open the search.
- **Document information:** This information appears below the search results arrows and can include the following information:
 - **Search preferences buttons: Renditions, Threading, Sources and attachments**
 - **Note:** For information about how to work with these buttons, see [Work with search preferences buttons](#) in this document.
 - A button that allows you to copy the active Document ID to the clipboard.
 - **The active Document ID:** On the **Documents** page toolbar and elsewhere in the application, a triangle icon indicates the active document.
 - **Tip:** Click the arrow next to the active document ID to perform additional tasks, for example, to open the document in a linked workspace, copy the link to the document, or find similar documents.
 - The total document count.
 - The selected document count. To deselect these documents, click the **X**.
- **Browse:** Click the **Browse** button to open the **Browse** pane, if it is not already open.
- **Search:** Click the **Search** button to create a new advanced search.
- **Workspaces buttons and menu:** To change the current workspace configuration, click a different workspace button. To open a menu that allows you to add a new workspace, modify an existing workspace, or select workspaces to pin to the toolbar, click the arrow next to the workspaces button.
- **Tools:** To use document tools, click the arrow next to the **Tools** button.
- **Document arrows:** Use the arrows on the right to browse through documents in the results set.

Tip: To increase the height of your workspace, you can collapse the **Documents** page toolbar. On the navigation bar, click the **Collapse** button, next to the **Help** button.

WORK WITH ASSIGNMENTS

You can access your assignments in the **Browse** pane. To open the **Browse** pane, on the **Case Home** page or the **Search** page, click the **Browse** button on the toolbar. Then, click the **Assignments** section in the **Browse** pane.

Note: If you do not see the **Assignments** section in the **Browse** pane, click **Options** on the **Browse** pane menu. Then, add the **Assignments** section to the **Browse** pane.



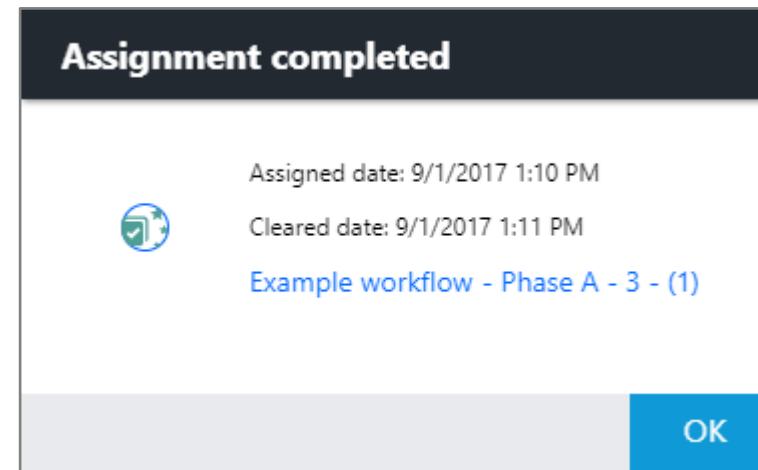
- To get the next set of documents that are assigned to you, on the toolbar, click the **Get next assignments** button, which looks like a clipboard.
- To open all documents in an assignment, click an assignment name.
- To open any uncoded documents that still require review, in the Remaining column, click **Get**.

When you open an assignment, the application displays the documents that require coding or review. The workspace panes that the documents appear in depend on your workspace configuration. The documents typically appear in the **List** pane.

If an assignment meets the coding requirements, the assignment is automatically cleared when you open it.

To clear a completed assignment, suspend an assignment, or resume an assignment, click the **Options** menu next to an assignment, and then select an action. Group leaders can also revoke assignments.

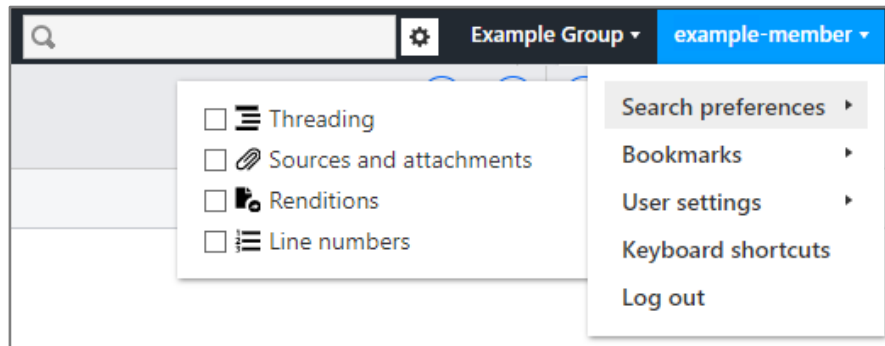
To manage your assignments on the **My Assignments** page, click the **Manage** button on the toolbar.



SET SEARCH PREFERENCES

You can set preferences for searches, including whether you want your search results to include threaded documents, attachments with source documents, or renditions. You can also include line numbers when your search results appear in the List pane. All options are cleared by default.

The **Search preferences** menu is available on the user name menu on the navigation bar of any page in the case.



After you save your search preferences, the application applies your preferences to all subsequent searches.




Note: The options that you set on the **Search preferences** menu sync with the search preference options at the bottom of the **Search** page.



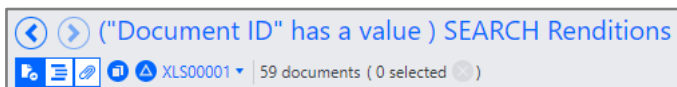
WORK WITH SEARCH PREFERENCES BUTTONS

Search preferences buttons

The following search preferences buttons are available on the toolbar on the **Documents** and **Search** pages:

-  Renditions
-  Threading
-  Sources and attachments

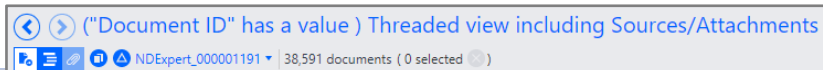
If you set your search preferences to include **Renditions**, **Threading**, or **Sources and attachments**, the search preferences buttons on the toolbar appear with a dark blue background.



If you do not set your search preferences to include **Renditions**, **Threading**, or **Sources and attachments**, the search preferences buttons on the toolbar appear with a white background.



Note: If you select **Threading**, the application automatically selects **Sources and attachments**, and the **Sources and attachments** button appears with a light blue background because threaded documents include sources and attachments.



Rerun your current search

To rerun your current search with different search preferences, click any of the three buttons. For example, to include renditions in your current search, click **Renditions**.



To rerun your search without renditions, click **Renditions** again.



Additional information

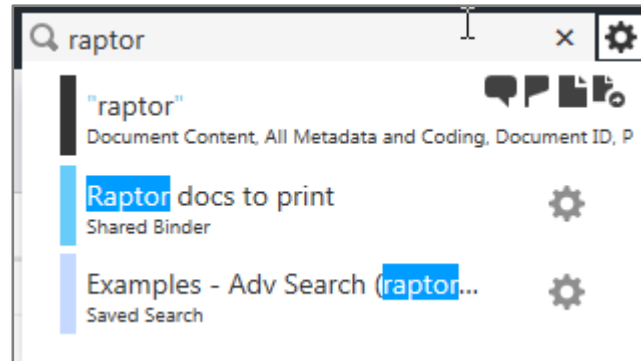
- The application captures any changes to the search settings in the search history.
- When you change your search settings for your current search using the buttons on the **Documents** or **Search** pages, the application does not apply the changes to the search preferences that you typically set on the **User name > Search preferences** menu or using the **Search preferences** check boxes on the **Search** page.

PERFORM A SIMPLE SEARCH

Use the quick search box, which is available on the navigation bar of all pages in the case, to perform simple searches.

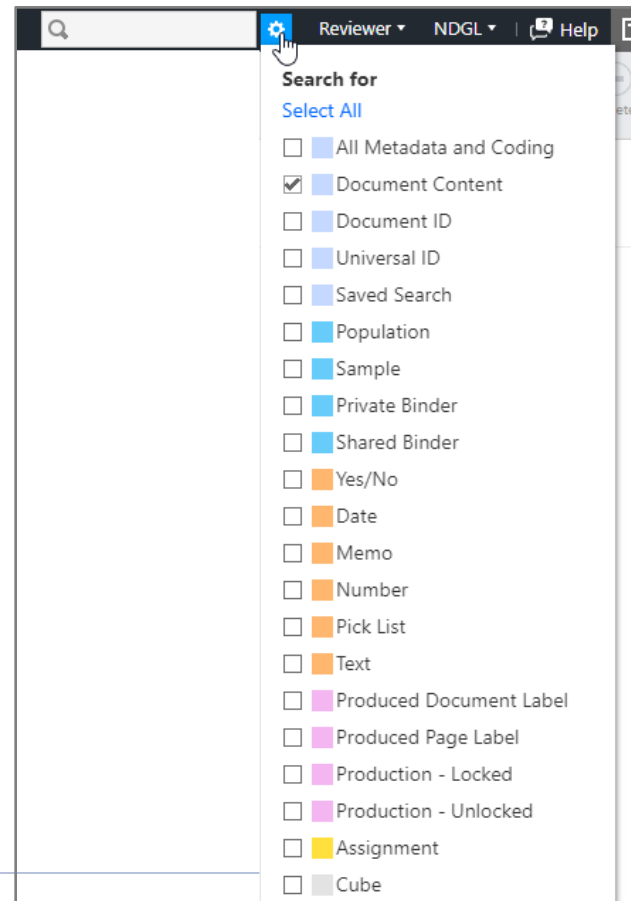
Start typing in the quick search box to start your search. In the results list, you can filter by certain search parameters.

If you have permissions, you can also manage the properties or security for objects such as binders.

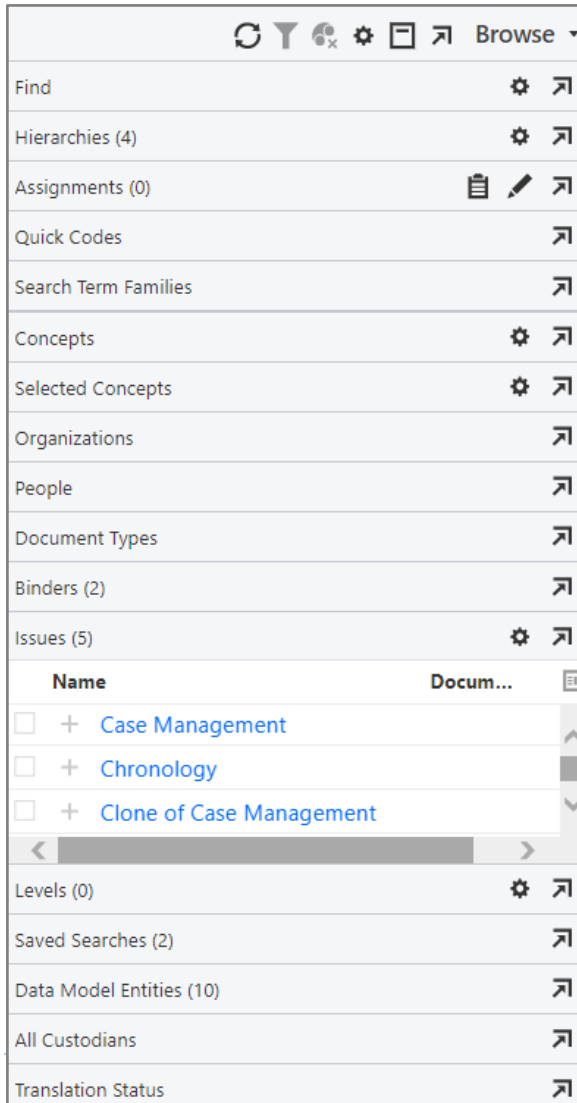


To change the type of search, click the gear button next to the quick search box. Then, select a search option on the menu.

Note: Only one option, **Document Content**, is selected by default.



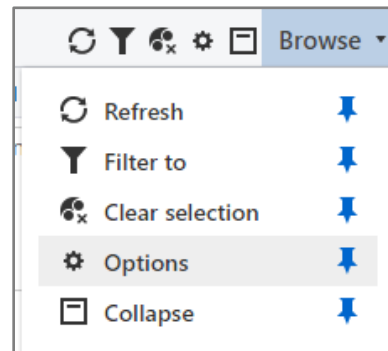
BROWSE AND FILTER DOCUMENTS



To open the **Browse** pane, on the **Case Home** page or the **Search** page, click the **Browse** button on the toolbar. The first workspace that includes the **Browse** pane appears and displays the Browse features available to you.

In the **Browse** pane, you can perform the following tasks:

- Browse for a new document set. To do this, click the name of the item that you want to browse for. For example, you can locate the documents in a binder, or browse to the documents that contain a specific concept.
- Select and filter documents within the current document set that meet various criteria. To do this, select the check box next to the criteria. For example, you can select all of the documents that are coded with a specific quick code value or that are designated with a specific issue, and then filter the results set to display only those documents.
- Use the **Find** feature to select documents within a results set based on content hits or coding values.
- You can customize the sections that appear in the Browse pane and the order in which they appear. For example, you can add pick list fields as new sections. To do this, click the **Options** button.



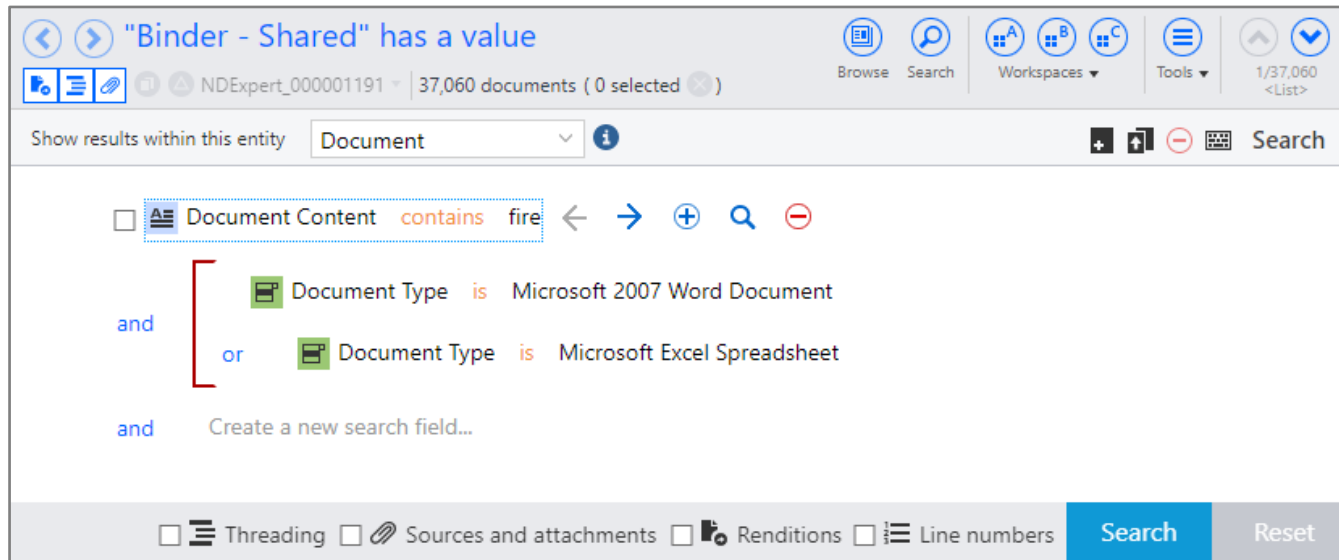
You can add the following sections to the **Browse** pane, if you have access to the features:

Pick list fields (for example, Translation Status, as shown in the figure on the left), Find, Hierarchies, Assignments, Quick Codes, Search Term Families, Concepts, Selected Concepts, Organizations, People, Document Types, Binders, Issues, Levels, Saved Searches, Data Model Entities, Identities, and All Custodians.

PERFORM AN ADVANCED SEARCH

You perform advanced searches on the **Search** page. To access the Search page, click the **Search** button on the **Case Home** page or the **Documents** page, or select the **Search** option on the **Case Home** menu.

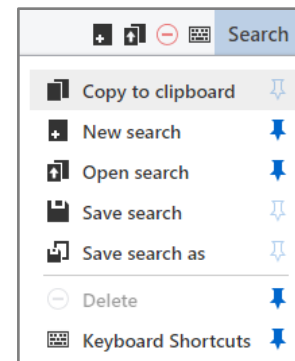
- Select from a wide range of fields, operators, and values.
- To set search preferences, select the check boxes at the bottom of the page.
- To run the search, click **Search** at the bottom of the page.



The screenshot shows the search interface with the following elements:

- Header: "Binder - Shared" has a value
- Navigation: Back, Forward, Home, Search, Workspaces, Tools, 1/37,060 <List>
- Entity: Show results within this entity: Document
- Query: Document Content contains fire
- Logic: and [or Document Type is Microsoft 2007 Word Document, Document Type is Microsoft Excel Spreadsheet]
- Footer: Threading, Sources and attachments, Renditions, Line numbers, Search, Reset

Use the **Search** menu to create a new search, or to copy, open, save, or delete a search. You can pin these options to the Search toolbar.



The Search menu options are:

- Copy to clipboard
- New search
- Open search
- Save search
- Save search as
- Delete
- Keyboard Shortcuts

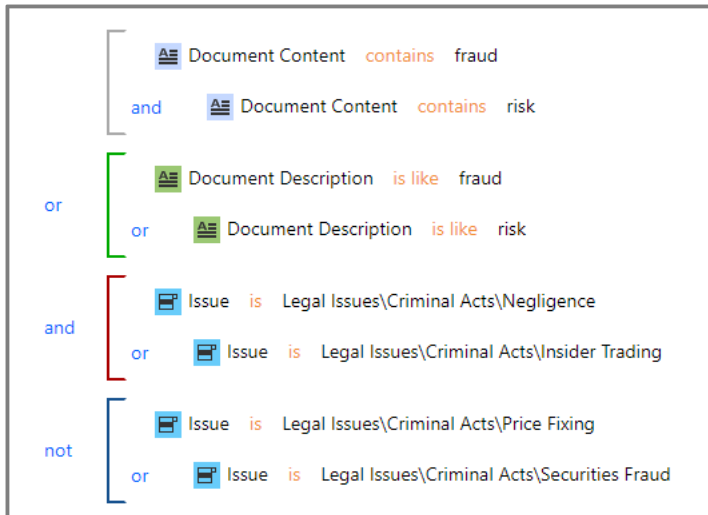
- To clear the current search criteria and create a new search, on the **Search** page, click **Reset**.
- To use the previous search criteria in a new search, click the search results name on the toolbar.



The screenshot shows the search toolbar with the search results name "Binder - Shared" has a value being clicked. A tooltip appears: "Open this search: 'Binder - Shared' has a value".

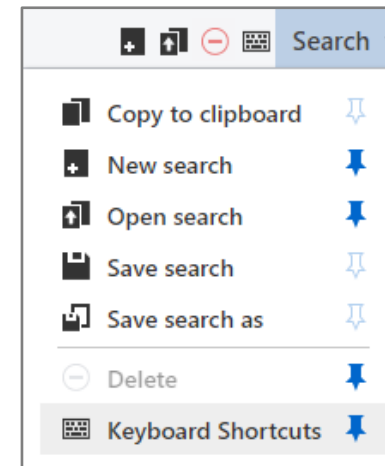
BUILD AN ADVANCED SEARCH QUERY

Build your search using the values, operators, and buttons on the Search page.








- ← **Gray bracket:** Group of search queries.
- ← **Green bracket:** Group of search queries joined by an “or” operator.
- ← **Red bracket:** Group of search queries joined by an “and” operator.
- ← **Blue bracket:** Group of search queries joined by a “not” operator.

Tip: To build your search without using a mouse, click the **Keyboard Shortcuts** button on the Search menu to see a list of keyboard shortcuts.



ADVANCED SEARCH: EXAMPLE SEARCH QUERY AND BUTTONS

Example search clause

A Document ID has a value     

and [Create a new search field...](#)

Search buttons

Button

Purpose



Add new clause



Add additional criteria (Coded by)



Remove additional criteria



Delete clause



Create group



Remove from or delete group



View selection (for example, mines and cubes)



Run only this line of the search query

WORK WITH SEARCH TERMS

You can view statistics for search term hits in documents using the Search Terms reporting feature.

To access the **Search Terms** page, on the **Case Home** page, under **Analysis**, click **Search Terms**.

- In the **Counts** section, you can view information about search term hits across document sets. You can also view how each search term contributes to the overall population of hits at a document and family level.
- In the **Coding** section, you can review how many documents containing a particular term were coded with specific values. This allows you to evaluate search term effectiveness using recall and precision values.

Search term family		Document set				Coding field		Positive		Negative		Apply
Common English Words 2		All documents in the case				[ACUITY] Case Issues		1. Watchdogs		2. Fraud		
✓	Term label	Counts				Coding						
		Document	Family	Unique document	Unique family	Recall	Precision	Positive with term	Negative with term	Not coded with term	Positive without term	Negative without term
	Total	714,403	842,727			100.00%	63.33%	38	22	714,345	0	1
✓	developments	4,182	13,095	1	0	2.63%	100.00%	1	0	4,181	37	23
✓	languages	846	2,135	1	0	0.00%		0	0	846	38	23
✓	managements	67	142	0	0	0.00%		0	0	67	38	23
✓	players	15,439	28,272	10,602	0	2.63%	100.00%	1	0	15,438	37	23

You can download the full report as a spreadsheet (.csv file).

Tip: For additional information about the individual columns on this page, see the [Search Terms](#) topic in the online help.

ABOUT THE WORKSPACE FEATURE (1 OF 2)

The workspace is the arrangement of panes on the Documents page. The workspace appears when you open the Documents page after you run a search or browse a document collection.

The screenshot displays a workspace interface with several panes:

- Left Pane:** A sidebar with navigation options: Find, Quick Codes, Search Term Families, Concepts, Selected Concepts, Organizations, People, Document Types, Binders, Issues, and Levels (4). Below this is a table with columns 'Name' and 'Count':

Name	Count
+ BERTHA	0
+ ESSO	0
+ MD Testing	0
- Top Center Pane:** A list of documents with columns 'Document ID' and 'Document Title'. The list includes:

Document ID	Document Title
ESSO.0012.0081	Student Transcript St...
ESSO.0012.0114	Student Transcrip...
ESSO.0012.0209	Student Transcrip...
- Top Right Pane:** A search pane with a 'Find' field and 'Find' and 'Reset' buttons.
- Bottom Left Pane:** A 'Concept Cloud' pane displaying a word cloud with terms like 'MICHAEL GIBBS', 'Stephen Bennett', 'No Complete', 'James Ward', 'Martin Gallagher', 'David DELAHUNTY', 'Richard Status', 'plant manager', 'name date', 'fire truck', '94-LFD flare', 'first aid', 'Andrew Noble', 'complete S', 'EAL ant', 'plant operator', and 'complete S'.
- Bottom Right Pane:** A 'Map' pane showing a cluster of blue dots and a 'Set Aside Clusters' button.

Tip: You can collapse or resize any of the panes, if you need more space. If you narrow the width of a pane, the pane name collapses into a menu.

ABOUT THE WORKSPACE FEATURE (2 OF 2)

You can perform different tasks in each pane, as follows:

- Use the **Audio** pane to transcribe individual audio documents or multiple audio documents.
- Use the **Browse** pane to open your assignments, browse for a new document set, select and filter documents within the current results set that meet various criteria, or find document content or coding hits.
- Use the **Code** pane or the **Conditional Coding** pane to code documents.
- Use the **Coding History** pane to view an audit history of coding changes.
- Use the **Compare** pane to view the differences between the text of two documents.
- Use the **List** pane to see information about each document, along with coding and document details.
- Use the **Map** pane to see a visualization of documents that are clustered based on the similarity of concepts.
- Use the **Memo Editor** pane to create and edit memos, create and remove links, and download memos in a Hypertext Markup Language (HTML) format. The **Memo Editor** works with documents and entities.
- Use the **Related** pane to see a list of documents that are related to each other based on threaded relationships, source and attachment relationships, or similarity of concepts.
- Use the **Timeline** pane to review the distribution of documents over time.
- Use the **Translate** pane to submit documents for machine language translation using a Google or Microsoft service.
- Use the **View** pane to view a document's text content, native files, and image files.
- Use the social network analytics panes (**Domain Network**, **Communication Network**, and **Concept Cloud**) to view the communication patterns between people and organizations.

CUSTOMIZE THE WORKSPACE

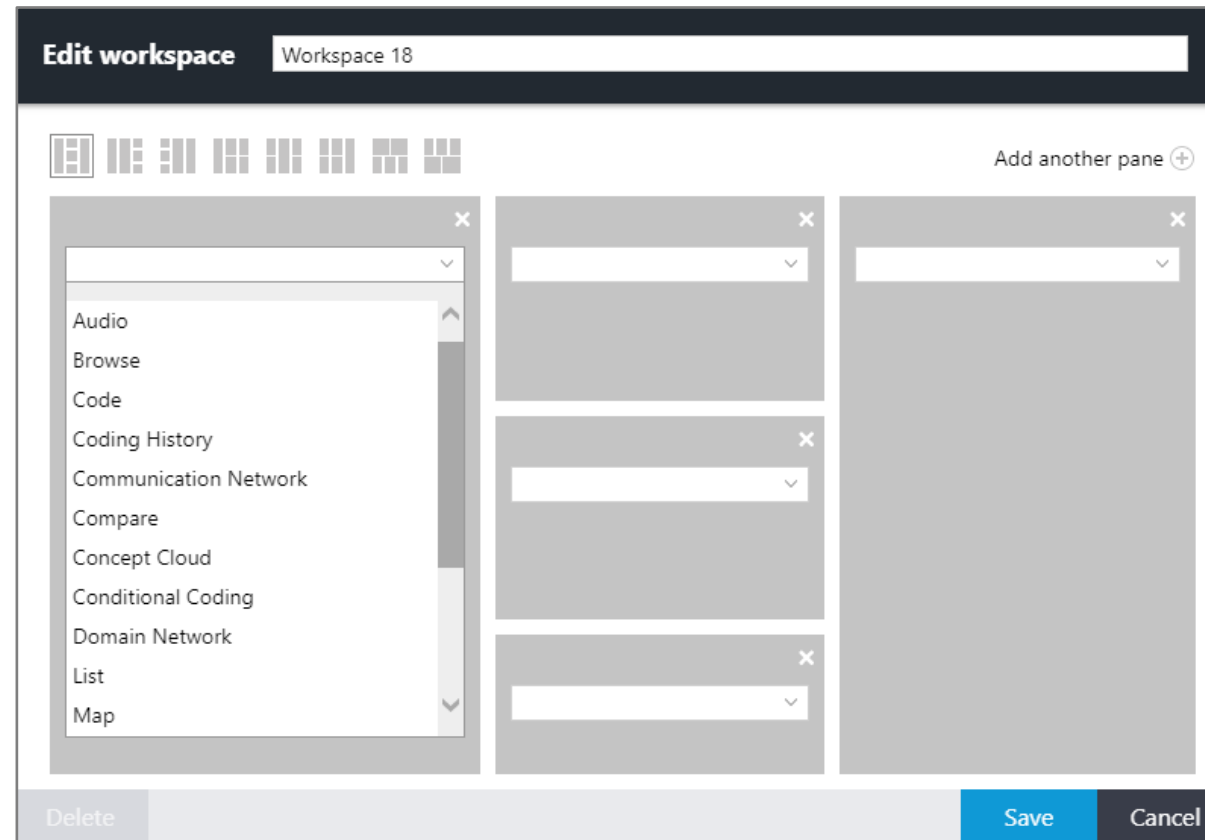
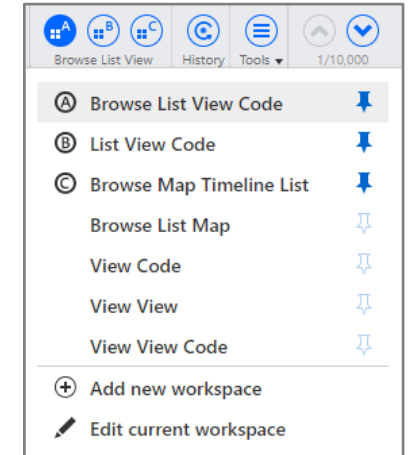
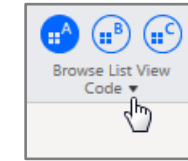
To change the current workspace, click one of the three pinned workspace buttons (A, B, or C) on the toolbar. Or, click a workspace name on the workspace menu.

You can pin up to three workspaces to the toolbar. To pin a different workspace to the toolbar, open the workspace menu, and then click the pin next to a workspace.

To add a new workspace or edit the panes in an existing workspace, open the workspace menu. Then, click **Add new workspace** or **Edit current workspace**.

You can configure a workspace to contain up to five panes, including **Audio**, **Browse**, **Code**, **Coding History**, **Communication Network**, **Compare**, **Concept Cloud**, **Conditional Coding**, **Domain Network**, **List**, **Map**, **Memo Editor**, **Related**, **Timeline**, **Translate**, **View (A)**, and **View (B)**.

Note: If you do not see the default workspaces for your group, on the user name menu, under **User settings**, select **Reset to group default**.



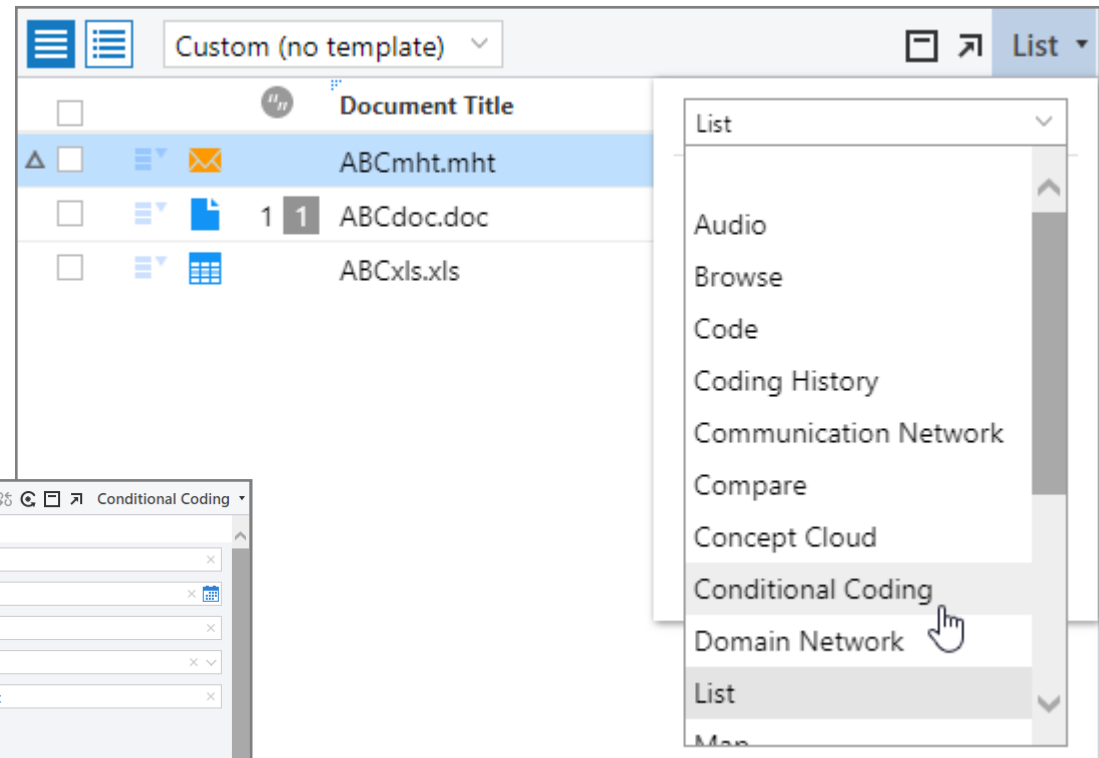
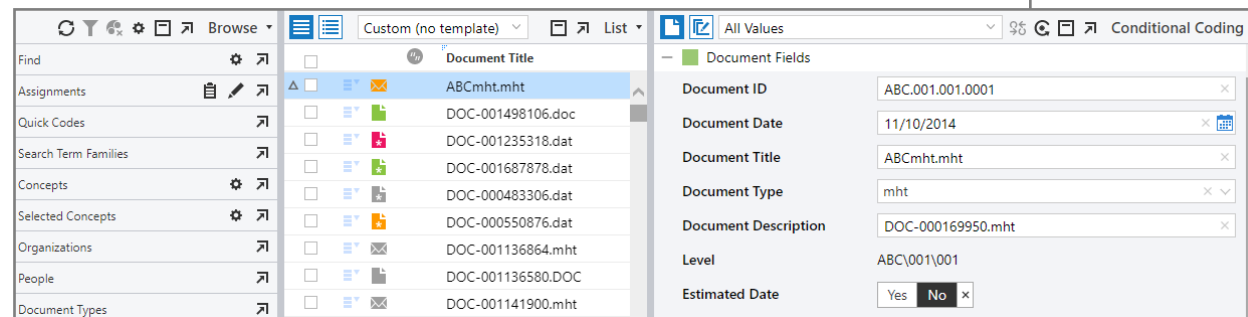
CUSTOMIZE THE WORKSPACE: CHANGE PANES

Once you have configured your workspace, you can change the configuration of the workspace panes on the fly.

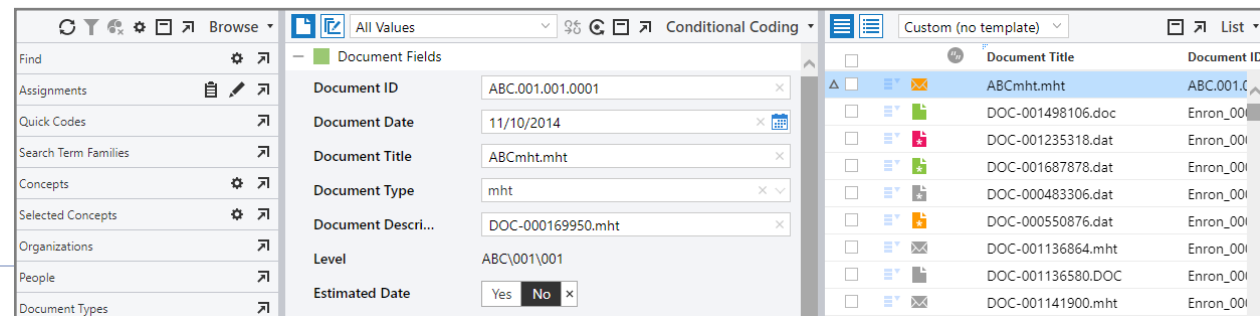
Simply select a different workspace pane from the workspace pane menu.

For example, if your workspace configuration includes a Browse pane, a **List** pane, and a **Conditional Coding** pane, if you change the **List** pane to a **Conditional Coding** pane, the **List** pane appears where the **Conditional Coding** pane used to be.

Before ↻

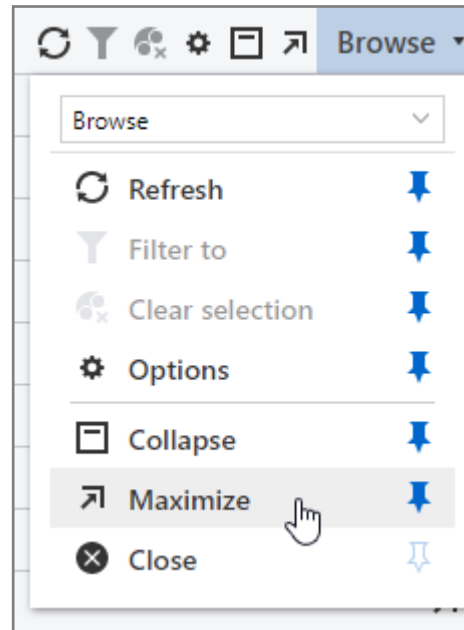


After ↻

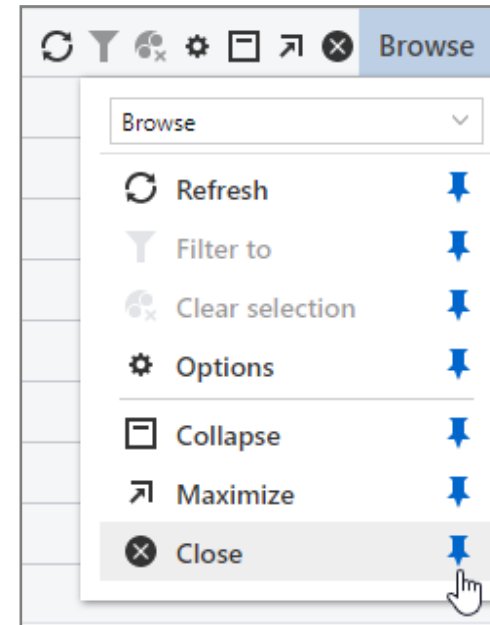


CUSTOMIZE THE WORKSPACE: MAXIMIZE OR CLOSE A PANE

To *maximize* a pane, select the **Maximize** option on the menu of any pane. The application maximizes the pane and hides all other panes in the workspace configuration.

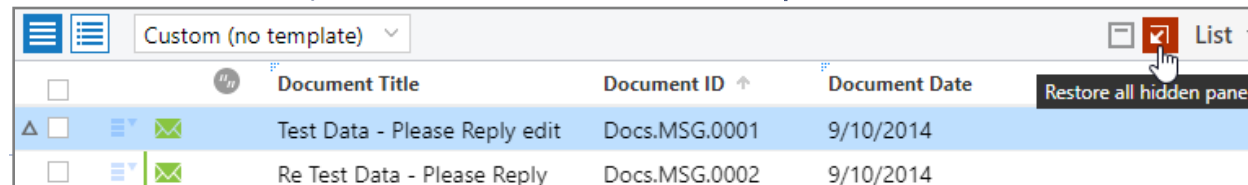


To *close* a pane, select the **Close** option on the menu of any pane. The application removes the pane from the current workspace as well as from the pre-set workspace configurations.



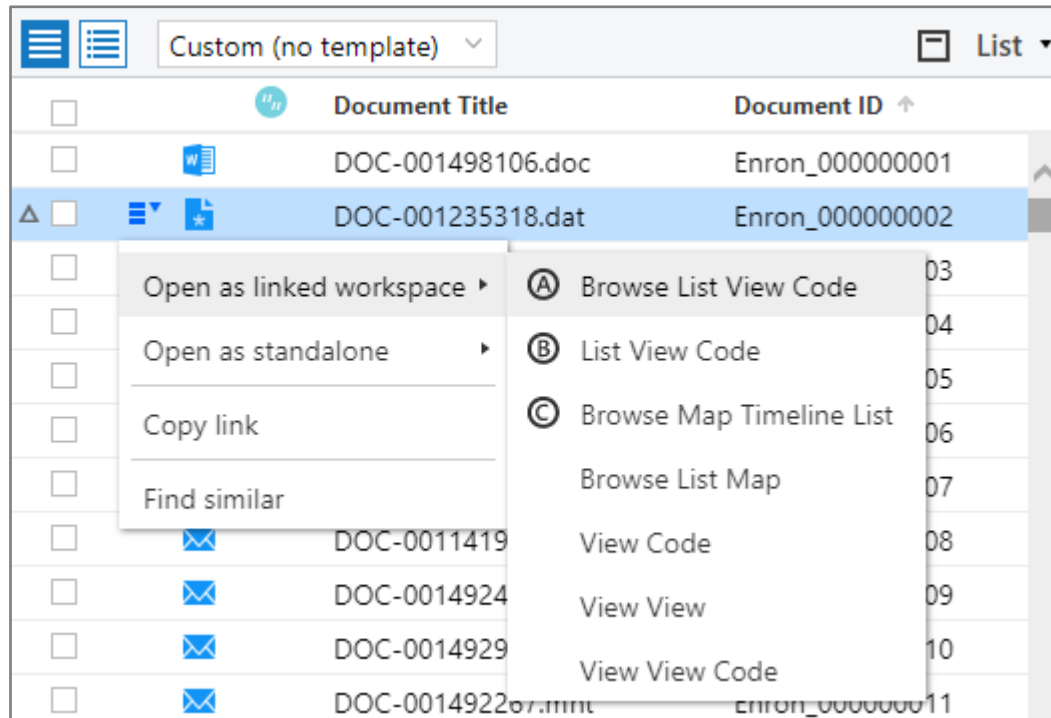
To add the pane that you closed back to a workspace, on the Workspaces menu, edit the workspace.

To restore the hidden panes, click the **Restore all hidden panes** button on the toolbar of the pane.



WORK WITH DOCUMENTS IN THE LIST PANE (STANDARD VIEW)

When you search for documents, the results typically appear in the **List** pane on the **Documents** page. The **List** pane includes information about each document, along with coding and document details.



Use the **List** pane to perform the following tasks:

- Select documents to view and code.
- Select documents for the Working list.
- Apply quick codes to documents.
- Work with email threads.
- Work with base documents and renditions.
- Filter and search the documents in the List pane.
- Open a document in a linked workspace or a standalone window.
- Copy the link to selected documents.
- Find similar documents.

To download a list of documents to a .csv or .xlsx format, click **Download** on the **List** menu. You can also provide a custom report title.

Note: To display line numbers in the **List** pane, select the **Line numbers** option on the **Search preferences** menu (on the user name menu or the **Search** page).

CONFIGURE COLUMNS IN THE LIST PANE

You can add or remove columns in the **List** pane, change the display order of columns, and select the default sort order for columns.

The screenshot displays the 'List' pane configuration interface. On the left, a sidebar contains options: 'Select Columns', 'Refresh', 'Collapse', 'Download', and 'Edit current tem...'. The main area shows a 'Columns' configuration window with a table of columns and a 'Save' button.

Name	Attribute	Sort	Order
Quick Code Family Field	Value		
Quick Code Field	Value		
Keywords Hits	Count		
Content Hits	Count		
Coding Hits	Count		
Document Title	Value		
Document ID	Value	1	A to Z
Document Date	Value		
Custodian	Value		

Below the table is a dropdown menu for 'Binder' with options: 'Binder - Private' and 'Binder - Shared'.

The 'Columns' dialog box is open, showing a 'Save these columns as a template' checkbox (checked), a 'Name' field with 'First review', and a table of columns:

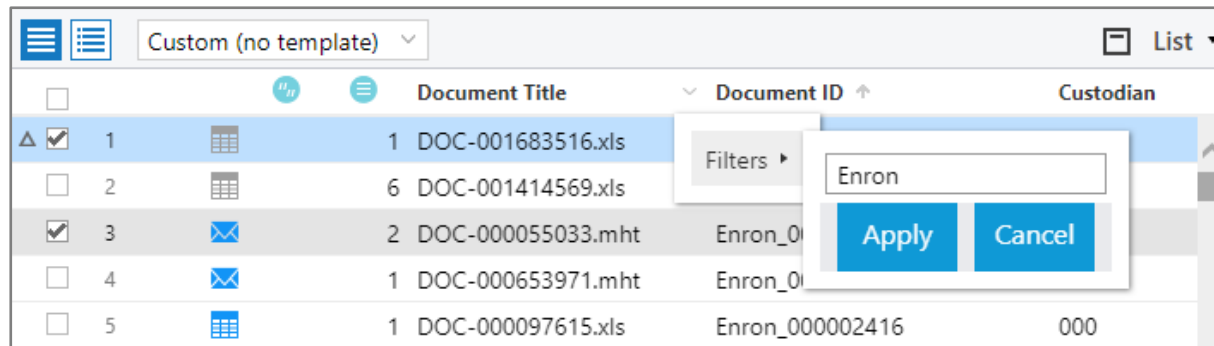
Name	Attribute	Sort	Order
Document Title	Value		
Document ID	Value	2	A to Z
Responsiveness	Value	1	A to Z
Responsive Reason	Value		
Select a field			

The dialog box has 'Save' and 'Cancel' buttons at the bottom.

To quickly access a set of columns in the **List** pane, save the columns as a column template.

FILTER COLUMNS IN THE LIST PANE

After performing a search, you can narrow your search results by filtering the columns in the **List** pane. You can filter for text, dates, yes/no values, or numbers.

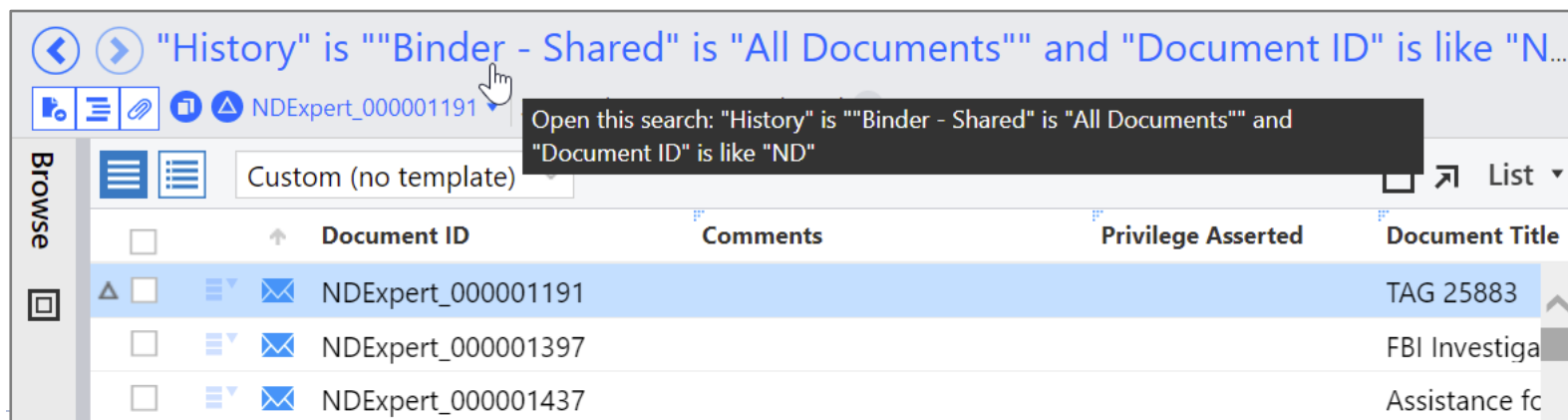


The screenshot shows a list pane with a search label "Custom (no template)". The list contains five rows with columns for Document ID, Document Title, and Custodian. A filter dialog box is open over the "Document ID" column, showing the text "Enron" and "Apply" and "Cancel" buttons.

	Document ID	Document Title	Custodian
1	DOC-001683516.xls		
2	DOC-001414569.xls		
3	DOC-000055033.mht	Enron_0	
4	DOC-000653971.mht	Enron_0	
5	DOC-000097615.xls	Enron_000002416	000

To return to the unfiltered results for the search, click the left arrow button on the left side of the toolbar.

After you apply a filter, the criteria used for the filter become part of the search label. You can click the search label to open an advanced search with these criteria on the **Search** page.



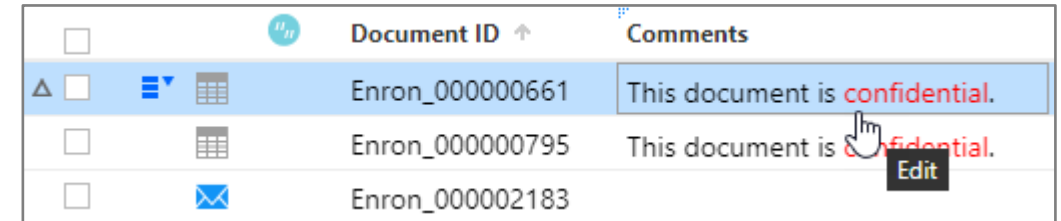
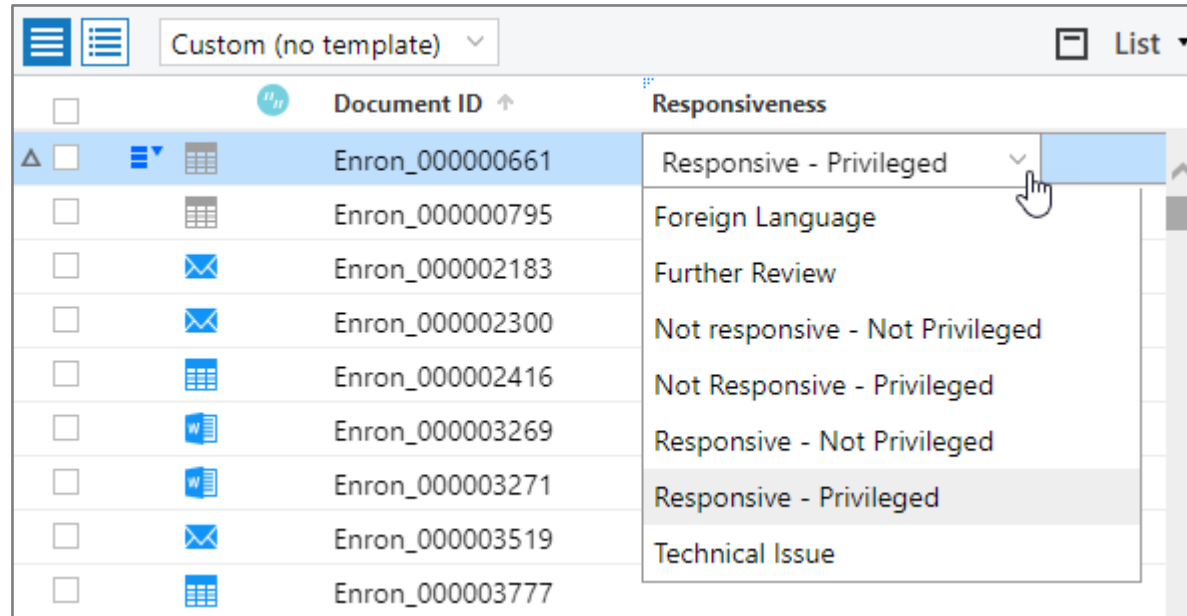
The screenshot shows a list pane with a search label "History" is ""Binder - Shared" is "All Documents"" and "Document ID" is like "N...". A tooltip is open over the search label, showing the text "Open this search: 'History' is ""Binder - Shared" is "All Documents"" and "Document ID" is like "ND".

Document ID	Comments	Privilege Asserted	Document Title
NDExpert_000001191			TAG 25883
NDExpert_000001397			FBI Investiga
NDExpert_000001437			Assistance fc

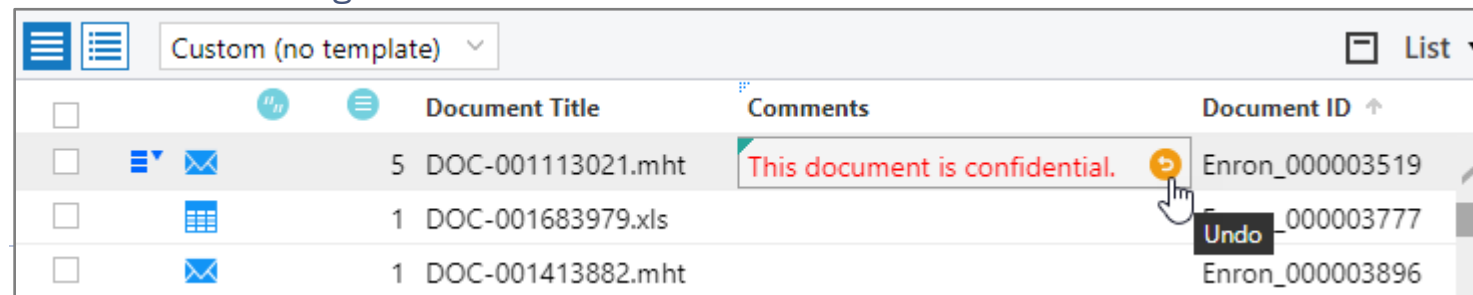
EDIT FIELDS INLINE IN THE LIST PANE

You can edit the values of some fields directly in the **List** pane. Fields that can be coded directly in the **List** pane appear with an icon in the column heading.

Double-click a field to edit its value.



You can undo changes made to editable fields in the List.



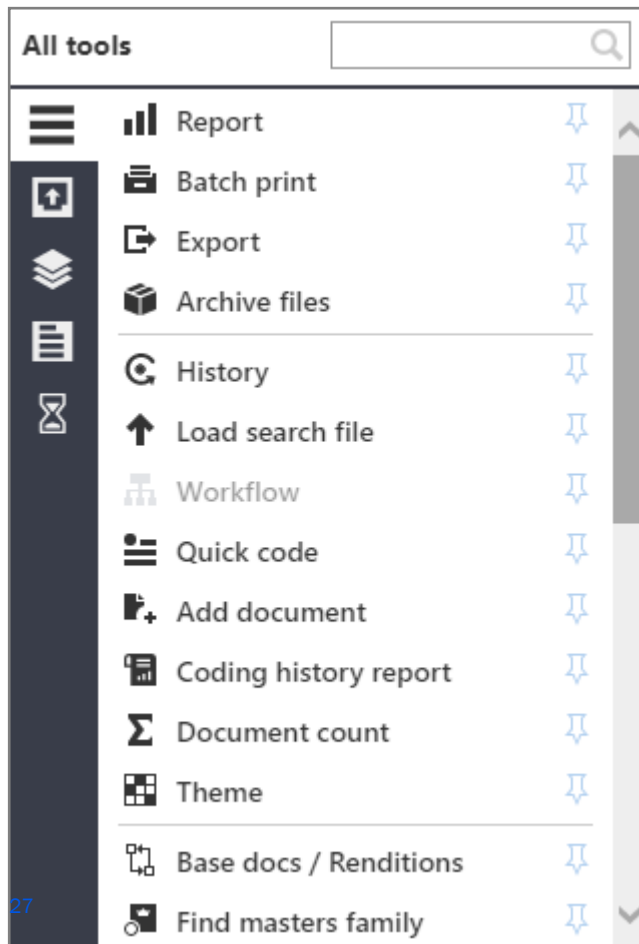
WORK WITH TOOLS ON THE DOCUMENTS PAGE (1 OF 2)

The **Tools** menu on the **Documents** page includes a variety of features for working with documents.

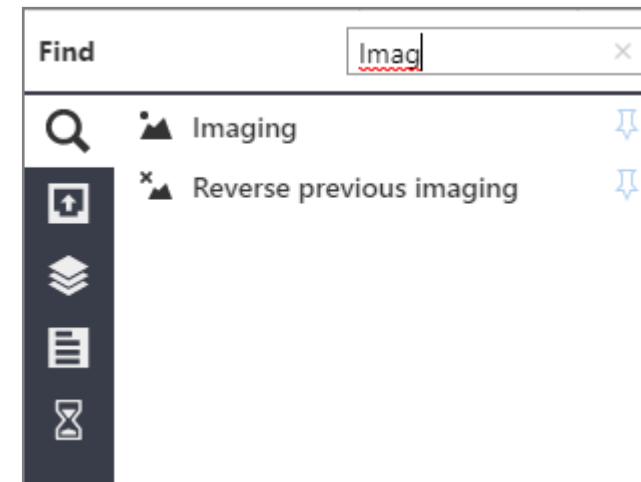
The tools are organized into logical groupings. You can view all tools. Frequently used tools are at the top of the menu. You can also search for tools without having to scroll through the menu.

Tip: You can pin the options on the **Tools** menu to the toolbar.

View all tools



Find tools quickly



WORK WITH TOOLS ON THE DOCUMENTS PAGE (2 OF 2)

The tools are organized into the following logical groups that you can access by clicking the buttons in the navigation pane on the menu:

- Output
- General
- Results
- Processing

The 'Output' menu is displayed with a search bar at the top. The navigation pane on the left contains icons for a menu, an up arrow, a stack of documents, and a document icon. The main menu items are: Report, Batch print, Export (highlighted), and Archive files. Each item has a blue pin icon to its right.

The 'Results' menu is displayed with a search bar at the top. The navigation pane on the left contains icons for a menu, an up arrow, a stack of documents, a document icon, and a sandglass icon. The main menu items are: Base docs / Renditions, Find masters family, Find family duplicates (highlighted), Find individual duplicates, Remove family duplicates, and Results remove individual duplicates. Each item has a blue pin icon to its right.

The 'General' menu is displayed with a search bar at the top. The navigation pane on the left contains icons for a menu, an up arrow, a stack of documents, a document icon, and a sandglass icon. The main menu items are: History, Load search file, Workflow, Quick code (highlighted), Add document, Coding history report, Document count, and Theme. Each item has a blue pin icon to its right.

The 'Processing' menu is displayed with a search bar at the top. The navigation pane on the left contains icons for a menu, an up arrow, a stack of documents, a document icon, and a sandglass icon. The main menu items are: Imaging, Reverse previous imaging, Renumbering, OCR processing, Bulk annotations, Extract text, Process audio (highlighted), Indexing and enrichment, Thread analysis, Convert page annotations, and Translate. Each item has a blue pin icon to its right.

PRINT DOCUMENTS TO PDF

You can print documents to PDF using the **Batch Print** tool, which is located on the **Tools** menu.

After you print documents to PDF, you can use the print options in your PDF viewer to print hard copies.

Note: The application will prefix the Document ID names on the files to maintain the order you specified.

You can print documents that contain image files or PDF files. You can specify whether to include highlights, redactions, and footers.

You can print each document separately or combine multiple documents into one PDF file.

The image displays three overlapping screenshots of the 'Batch print' tool interface. The top-left screenshot shows the main window with 'Selected documents: 14' and 'Total pages: 43'. Below this is a table for adding footers to non-produced documents:

Footer	Type	Value
Left	▼	
Middle	▼	
Right	▼	

The middle screenshot shows the 'Batch Print Settings' panel. Under 'Items to print', the following options are checked: Redactions, Footers, and Font size (pt) is set to 11. Under 'Redaction labels', the following options are checked: REDACTED, User name, Date stamp, and Redaction set. Font size (pt) is also set to 11.

The bottom-right screenshot shows the 'Document slip sheets' panel with 'Document ID' and 'Custom text' options. The 'Page orientation' panel has 'Rotate for best fit' selected. The 'Send to printer' panel has 'All selected files in one PDF in search result sort order' selected. 'Submit' and 'Close' buttons are visible at the bottom.

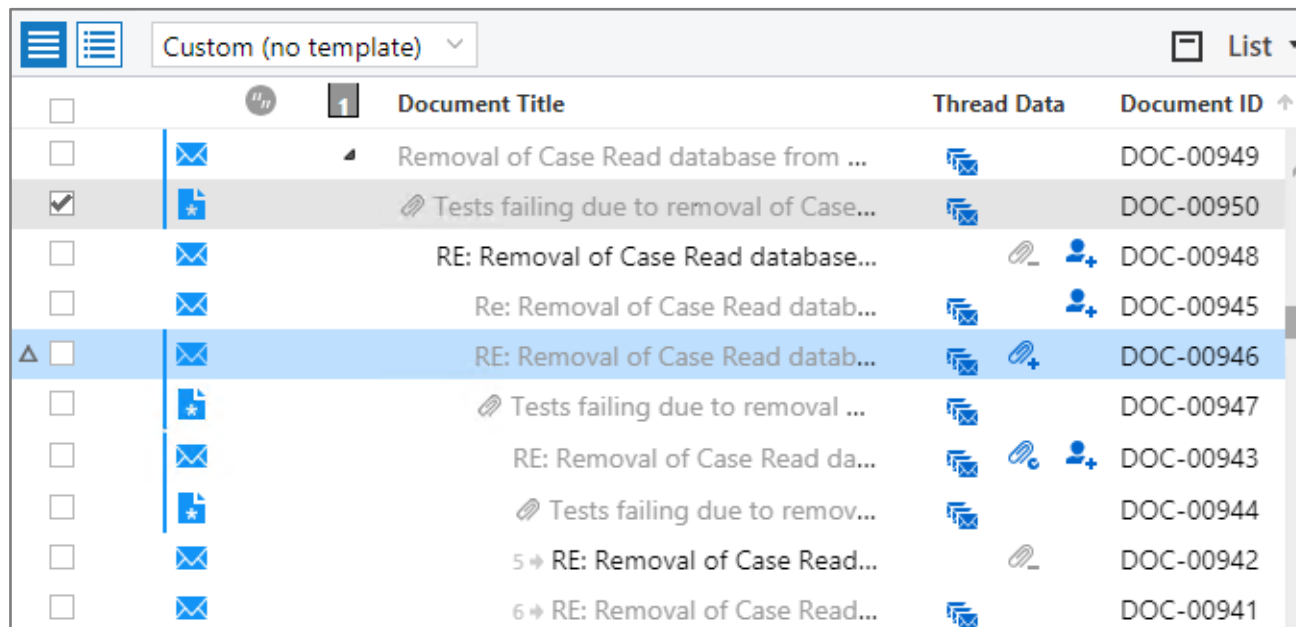
WORK WITH THE EMAIL THREADING FEATURE (1 OF 2)

The email threading feature analyzes document content and organizes email conversations into threads.

You can use email threading to perform the following tasks:

- Shorten review time by removing duplicate documents and coding only pivot documents.
- Increase review efficiency and accuracy by reviewing threaded documents together.

In threaded view in the **List** pane, you can review documents using both standard and threading-specific elements.



<input type="checkbox"/>	<input type="checkbox"/>	Document Title	Thread Data	Document ID
<input type="checkbox"/>		Removal of Case Read database from ...		DOC-00949
<input checked="" type="checkbox"/>		Tests failing due to removal of Case...		DOC-00950
<input type="checkbox"/>		RE: Removal of Case Read database...		DOC-00948
<input type="checkbox"/>		Re: Removal of Case Read datab...		DOC-00945
<input checked="" type="checkbox"/>		RE: Removal of Case Read datab...		DOC-00946
<input type="checkbox"/>		Tests failing due to removal ...		DOC-00947
<input type="checkbox"/>		RE: Removal of Case Read da...		DOC-00943
<input type="checkbox"/>		Tests failing due to remov...		DOC-00944
<input type="checkbox"/>		5 → RE: Removal of Case Read...		DOC-00942
<input type="checkbox"/>		6 → RE: Removal of Case Read...		DOC-00941

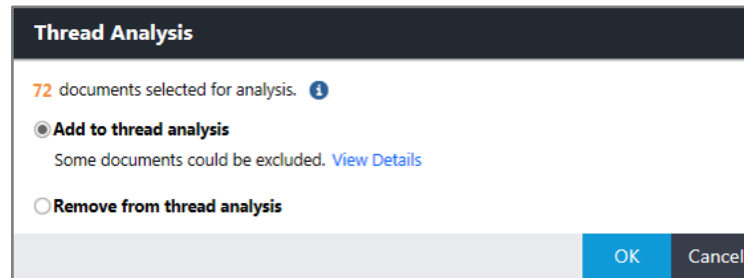
Threading-specific icons in the **Thread Data** column show the following information:

- Pivot documents. Pivot documents contain unique content. A thread can have one or more pivots.
- Recipient and attachment changes within a thread.

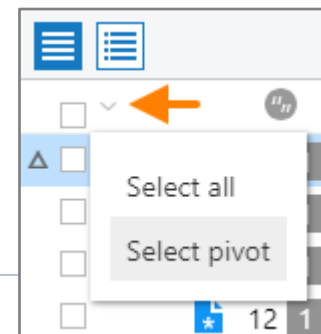
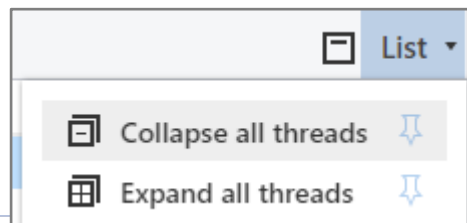
WORK WITH THE EMAIL THREADING FEATURE (2 OF 2)

To work with the email threading feature:

1. Select the **Threading** option on the **Search preferences** menu (on the user name menu or the **Search** page).
2. Return a set of documents.
3. Add documents to thread analysis or remove documents from thread analysis by using the **Thread analysis** option on the **Tools** menu.



4. After the application has analyzed the documents and created threads, review the threaded documents.
 - To view just the pivot and root documents in a thread, click the **Collapse all threads** button on the **List** menu. To view all documents in a thread, click the **Expand all threads** button.
 - To select only the pivot documents and their attachments, use the **Select pivot** option at the top of the **List** pane.



REVIEW DOCUMENTS IN THE VIEW PANE

When you review a document, you determine the document's relevance to a case and identify any important content. You review the content of individual documents in the **View** pane.

The **View** pane includes different view options to allow you to review a document in the format that is most appropriate for the document type, the case strategy, and the overall goals of the review. Because you can see different content in each view, it is important to review documents in all views.

Depending on the tasks that you want to accomplish, the type of document you are reviewing, and the specific content that you want to review, you can view a document in the following formats:

- **Formatted content:** Displays the text extracted from a document, with simple formatting applied.
- **Unformatted content:** Displays the text extracted from a document without any formatting.
- **Native:** Displays a document in the native file format of the original application that created the document, using the Quick View Plus viewer.
- **Office Online viewer:** Displays a native document in Microsoft Office Online directly in the browser.
- **Image viewer:** Displays image files, PDF documents, and media files.

REVIEW DOCUMENTS IN THE VIEW PANE: FORMATTED CONTENT VIEW

Formatted content view displays the text extracted from a document, with simple formatting applied.

You can perform the following tasks:

- View keyword hits.
- Conduct ad hoc keyword searches.
- Search for similar documents based on a selection of text.
- View streamlined Bloomberg chats, with interactive color-coding based on participants' organizations.

The screenshot displays a document viewer interface. The main document content is a legal agreement, with the word "ENRON" highlighted in yellow. A search overlay is active, showing a search bar and a list of search results. The search results list includes a checked item for "Enron search terms" with a count of 2, and other categories like "Legal firms", "Legal staff", "Sentiment (negative)", and "Sentiment (positive)".

Document text (left pane):

This PURCHASE OPTION ASSIGNMENT AND ASSUMPT AGREEMENT (this "Agreement"), effective as of December [], 20 among **ENRON** NORTH AMERICA CORP., a Delaware corporati ("ENA"), E-NEXT GENERATION LLC, a Delaware limited liability company ("DevCo"), and WESTDEUTSCHE LANDESBANK GIROZENTRALE, NEW YORK BRANCH ("WestLB"). Capitalized not otherwise defined herein are used herein as defined in the Develop Agreement (as defined below).

RECITALS

WHEREAS, ENA and WestLB have entered into an Amended and Re Acquisition and Development Agreement (the "Development Agree dated as of May 12, 2000, appointing ENA as WestLB's acquisition ag

Document text (right pane):

This PURCHASE OPTION ASSIGNMENT AND ASSUMPTION AGREEMENT (this "Agreement"), effective as of December [], 2000, is among **ENRON** NORTH AMERICA CORP., a Delaware corporation ("ENA"), E-NEXT GENERATION LLC, a Delaware limited liability company ("DevCo"), and

Search Results Panel:

<input type="checkbox"/>	Keywords	Count
<input checked="" type="checkbox"/>	Enron search terms	2
<input type="checkbox"/>	Legal firms	
<input type="checkbox"/>	Legal staff	
<input type="checkbox"/>	Sentiment (negative)	
<input type="checkbox"/>	Sentiment (positive)	

REVIEW DOCUMENTS IN THE VIEW PANE: UNFORMATTED CONTENT VIEW

Unformatted content view displays the text extracted from a document without any formatting.

You can perform the following tasks:

- View keyword hits.
- Conduct ad hoc keyword searches.
- Search for similar documents based on a selection of text.

The screenshot displays two overlapping windows of an email viewer. The left window shows the unformatted content of an email. The right window shows the same email content with a keyword search panel open on the right side.

Unformatted Content (Left Window):

Re: part-time work
From: "vince j kaminski" To: cantekin@mail.utexas.edu Cc: "vince j kaminski" Date: Mon, 18 Sep 2000 18:50:00 +0100
Cantekin,
I shall call you tomorrow to discuss the details.
Vince

"Cantekin Dincerler" <cantekin@mail.utexas.edu> on 09/18/2000 02:59:41 PM
Please respond to <cantekin@mail.utexas.edu>
To: <Vince.J.Kaminski@enron.com>
cc:
Subject: part-time work

Hi Vince,
I promised to get back to you on the part-time work issue. Sorry for the delay, I got back to Austin only last week. I talked to Ehud about this and he is OK with it. Just wanted to let you know.

Best

Unformatted Content (Right Window):

Re: part-time work
From: "vince j kaminski" To: cantekin@mail.utexas.edu Cc: "vince j kaminski" Date: Mon, 18 Sep 2000 18:50:00 +0100
Cantekin,
I shall call you tomorrow to discuss the details.
Vince

"Cantekin Dincerler" <cantekin@mail.utexas.edu> on 09/18/2000 02:59:41 PM
Please respond to <cantekin@mail.utexas.edu>
To: <Vince.J.Kaminski@enron.com>
cc:
Subject: part-time work

Hi Vince,
I promised to get back to you on the part-time work issue. Sorry for the delay, I got back to Austin only last week. I talked to Ehud about this and he is OK with it. Just wanted to let you know.

Best

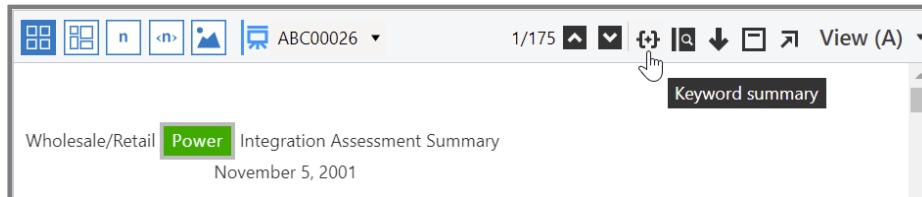
Keyword Search Panel (Right Window):

Find term

<input type="checkbox"/>	Keyw...	Count
<input type="checkbox"/>	[Dem...	
<input type="checkbox"/>	[senti...	
<input checked="" type="checkbox"/>	[senti...	1
<input type="checkbox"/>	Email...	
<input checked="" type="checkbox"/>	Enro...	0
<input checked="" type="checkbox"/>	Enro...	0
<input type="checkbox"/>	Enro...	
<input type="checkbox"/>	Excel...	
<input checked="" type="checkbox"/>	Finan...	0
<input checked="" type="checkbox"/>	HK -...	0

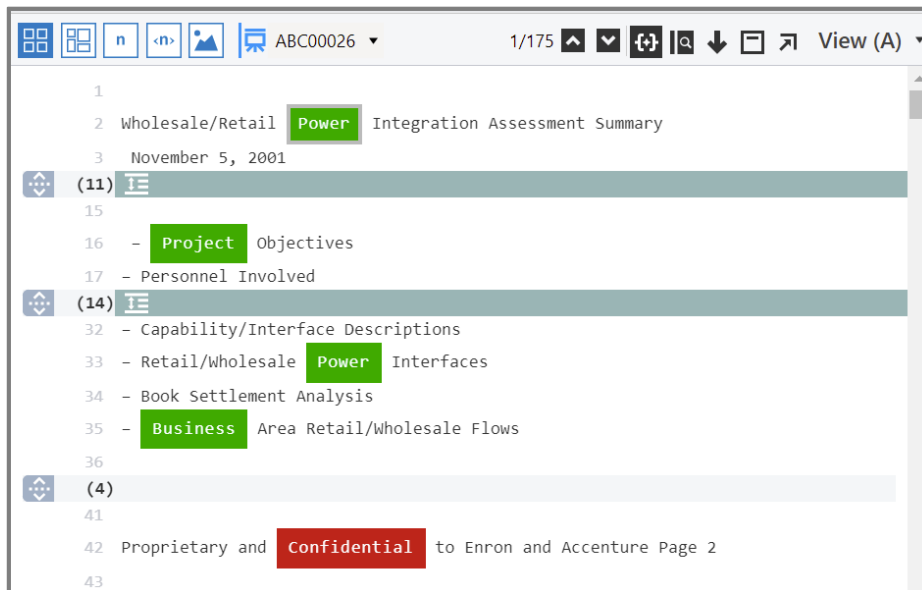
REVIEW DOCUMENTS IN THE VIEW PANE: KEYWORD SUMMARY

Use the Keyword summary feature in the View pane to review hits in a document in a more efficient manner and focus your review on the specific content immediately around the keyword highlights enabled in the formatted and unformatted content views.



After you click the **Keyword summary** button on the toolbar in the **View** pane, the layout changes and the application displays collapsed sections for only those parts of the document that contain hits. The layout also includes line numbers.

Note: If a document does not contain hits, the application does not collapse the sections but does display line numbers.



Each section includes a number next to the header of the section to indicate the number of collapsed lines, as well as the following buttons:

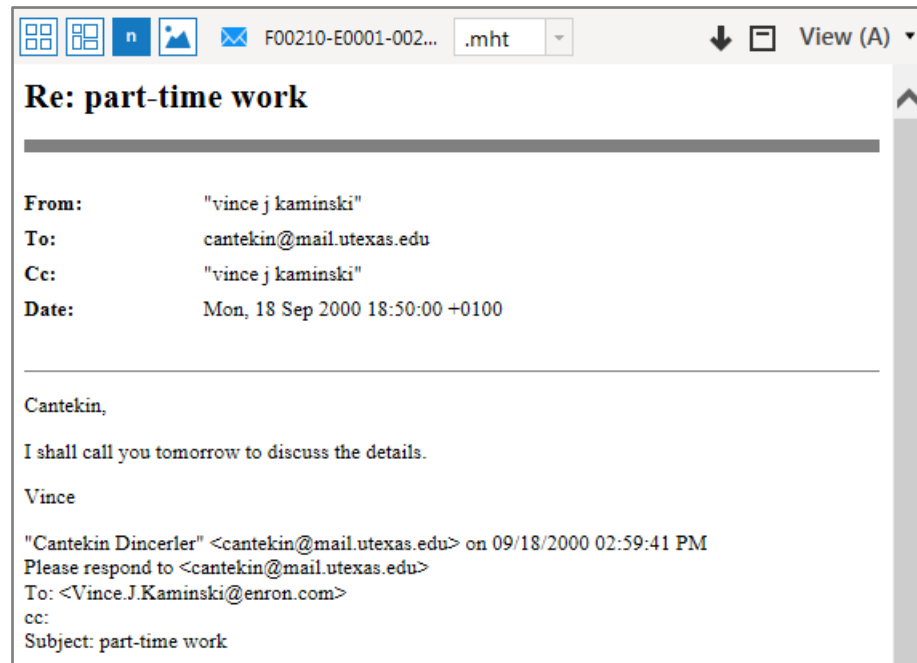
- **Expand more:** Expands the section with several lines before and after a hit, providing additional textual context of a hit in the document.
- **Collapse:** Collapses the section. This button appears in place of the **Expand more** button after clicking that button.
- **Expand all:** Expands the entire section and allows you to view all content in a section.
- **Collapse all:** Collapses the entire section. This button appears in place of the **Expand all** button after clicking that button.

REVIEW DOCUMENTS IN THE VIEW PANE: NATIVE VIEW

Native view displays a document in the native file format of the original application that created the document.

You can perform the following tasks:

- Search for content.
- Watch video files and listen to audio files.



Note: The file will start to download unless you have Quick View Plus installed.

REVIEW DOCUMENTS IN THE VIEW PANE: OFFICE ONLINE VIEWER

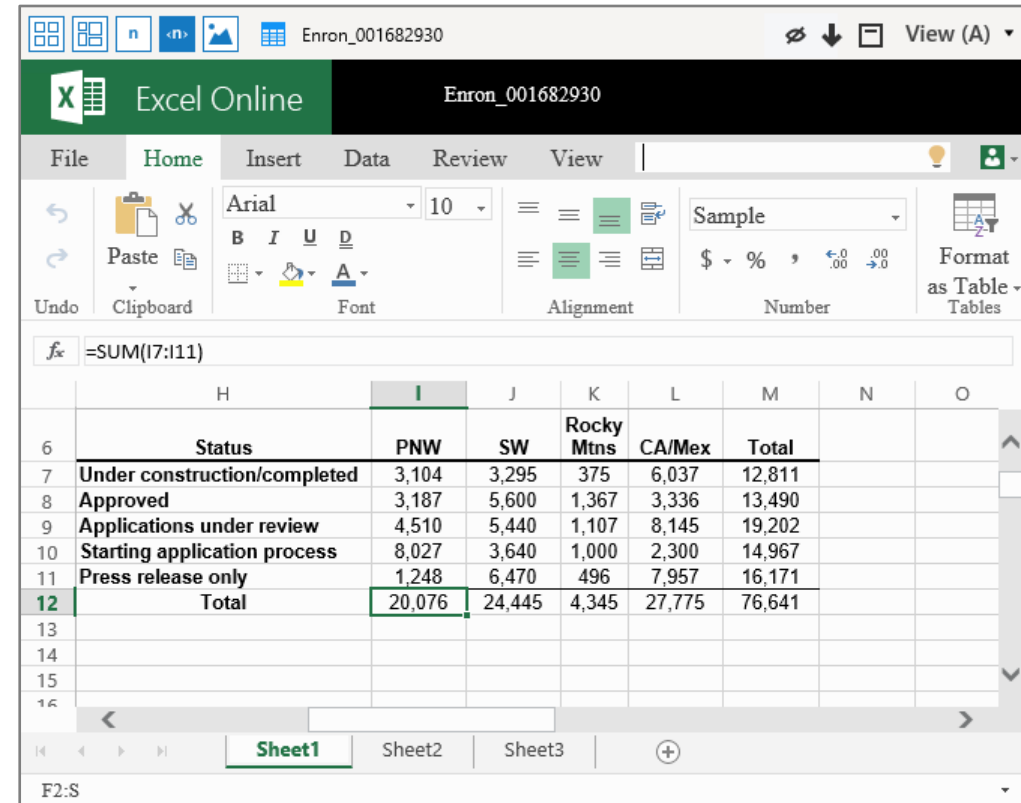
The **Office Online viewer** displays native files directly in the application using Microsoft Office Online. You can review native files without having to download documents to your computer.

You can perform the following tasks:

- Search for content.
- See formulas*, resize columns, and display hidden worksheets, rows, and columns* in a Microsoft Excel spreadsheet.
- View comments in Microsoft Word*, Microsoft Excel, and Microsoft PowerPoint.
- View slide notes*, slide thumbnails*, and hidden slides* in a Microsoft PowerPoint presentation.
- Use standard Microsoft Office features to review content*.
- View native files that were created in applications other than Microsoft Office.
- Watch video files and listen to audio files.
- Display hidden content.

Note: Depending on the portal configuration, you may be able to edit documents temporarily, such as adding temporary highlights. The application does not save any edits that you make in the Office Online viewer.

* The availability of features marked with an asterisk (*) depends on your organization's license with Microsoft and the portal options that are configured by your administrator.



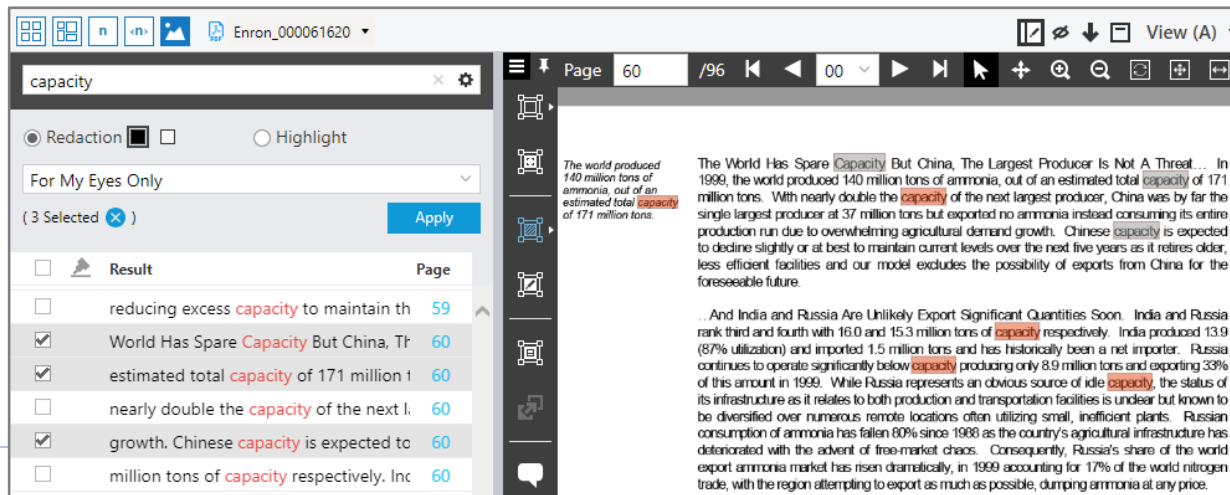
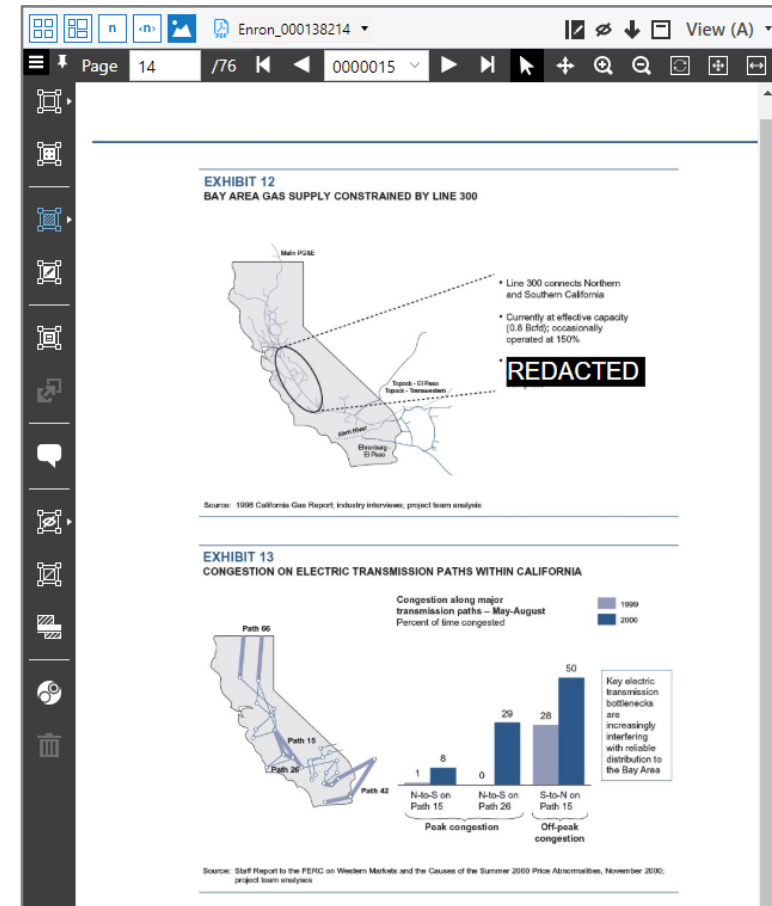
	H	I	J	K	L	M	N	O
6	Status	PNW	SW	Rocky Mtns	CA/Mex	Total		
7	Under construction/completed	3,104	3,295	375	6,037	12,811		
8	Approved	3,187	5,600	1,367	3,336	13,490		
9	Applications under review	4,510	5,440	1,107	8,145	19,202		
10	Starting application process	8,027	3,640	1,000	2,300	14,967		
11	Press release only	1,248	6,470	496	7,957	16,171		
12	Total	20,076	24,445	4,345	27,775	76,641		
13								
14								
15								
16								

REVIEW DOCUMENTS IN THE VIEW PANE: IMAGE VIEWER

The **Image viewer** displays image files, PDF documents, and media files.

You can perform the following tasks:

- View imaged document pages.
- Add annotations such as highlights or redactions.
- Search for text to highlight or redact in searchable PDFs.
- Convert highlights to redactions and convert redactions to highlights.
- Add notes to specific document pages.
- Download a document.
- Print a document.
- See who viewed a document and when, and download a report.
- Watch video files and listen to audio files.
- View comprehensive Bloomberg chats, including event logs and noise content.



OPTIMIZE VIDEO FOR VIEWING IN NUIX DISCOVER

The **Optimize video** feature allows users to bulk convert video to MP4 format for viewing within Nux Discover. To access the Optimize video feature, on the **Documents** page, select one or more documents for optimization and select **Optimize video** on the **Tools** menu, under **Processing**.

Note: Your administrator must configure and enable this feature.

The **Optimize video** window displays information on how many of the selected documents are eligible for optimization.

Optimize video

10,010 documents selected
5 documents will be submitted and 10005 will be excluded

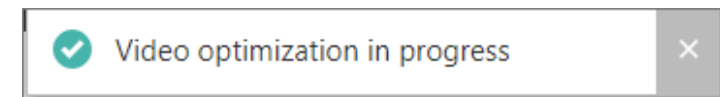
Optional inclusions	Documents that must be excluded
<input type="checkbox"/> Documents that do not need conversion (5)	Not eligible document types (10000)

OK Cancel

In this window, you can also include documents that do not need conversion in the optimization process.

Note: All non-video document formats are excluded from processing.

Click **OK** to begin the optimization process. A message appears indicating that the video optimization is in progress.



REVIEW DOCUMENTS IN THE VIEW PANE: APPLY ANNOTATIONS

You can highlight and redact the contents of a document. Highlights and redactions are annotations that allow you to mark specific content in a document.

You can highlight and redact one page in a document or multiple pages in a document.

Note: For detailed information about how to work with annotations, see [Annotate documents](#) in the online help.

Highlights

Highlights allow you to draw attention to content by applying different colors to the content. For example, if your review lead determines that content might be exempt from disclosure based on a variety of laws, you can use different colors to highlight content that meets each type of disclosure exemption.

The screenshot shows a document review interface with a search bar containing the word "capacity". Below the search bar, there are radio buttons for "Redaction" (selected) and "Highlight". A dropdown menu shows "For My Eyes Only" and a list of 3 selected results. The results table is as follows:

Result	Page
<input type="checkbox"/> reducing excess capacity to maintain th	59
<input checked="" type="checkbox"/> World Has Spare Capacity But China, Tr	60
<input checked="" type="checkbox"/> estimated total capacity of 171 million t	60
<input type="checkbox"/> nearly double the capacity of the next I.	60
<input checked="" type="checkbox"/> growth. Chinese capacity is expected to	60
<input type="checkbox"/> million tons of capacity respectively. Inc	60

The main document view shows text with several instances of the word "capacity" highlighted in red. The text discusses ammonia production and capacity in 1999, mentioning China and India.

Redactions

Redactions allow you to conceal privileged or confidential content with an opaque mask, to prevent third parties from viewing the content.

The screenshot shows a document review interface displaying a map of California. The map is titled "EXHIBIT 12 BAY AREA GAS SUPPLY CONSTRAINED BY LINE 300". A redacted area is visible on the map, labeled "REDACTED". The text next to the map states: "Line 300 connects Northern and Southern California. Currently at effective capacity (0.8 Bcf); occasionally operated at 100%". Below the map is a bar chart titled "EXHIBIT 13 CONGESTION ON ELECTRIC TRANSMISSION PATHS WITHIN CALIFORNIA". The chart shows congestion levels for various paths in 1999 and 2000. The data is as follows:

Path	1999	2000
Path 15	1	8
Path 28	0	29
Path 15	0	28
Path 15	0	50

The chart also includes a legend for "Peak congestion" and "Off-peak congestion".

REVIEW DOCUMENTS IN THE VIEW PANE: BULK ANNOTATIONS (1 OF 2)

The Bulk Annotations feature allows you to apply highlights or redactions to multiple documents simultaneously.

Apply bulk annotations using the **Bulk annotations** feature on the **Tools** menu on the **Documents** page. After the bulk annotation job is completed, you can view the annotations in the **Annotations List** pane, which you can access from the **Image viewer** in the **View** pane.

Note: Documents must be imaged in PDF format prior to using the Bulk Annotations feature.

Tip: To find the documents with bulk annotations, you can run a search on the **Search** page using the following search criteria: **Bulk Annotation Status is Succeeded**.

Label/Name	Page	Term	Type
Yellow	1	Search Terms	STP
Yellow	1	Search Terms	STP
Yellow	1	Search Terms	STP
Yellow	1	Search Terms	STP
Yellow	1	Search Terms	STP
Yellow	1	Search Terms	STP
Yellow	1	Search Terms	STP
Yellow	1	Search Terms	STP
Yellow	1	Search Terms	STP
Yellow	1	Search Terms	STP
Yellow	1	Search Terms	STP
Yellow	1	Search Terms	STP
Yellow	1	Search Terms	STP
Yellow	1	Search Terms	STP
Yellow	1	Search Terms	STP
Yellow	1	Search Terms	STP

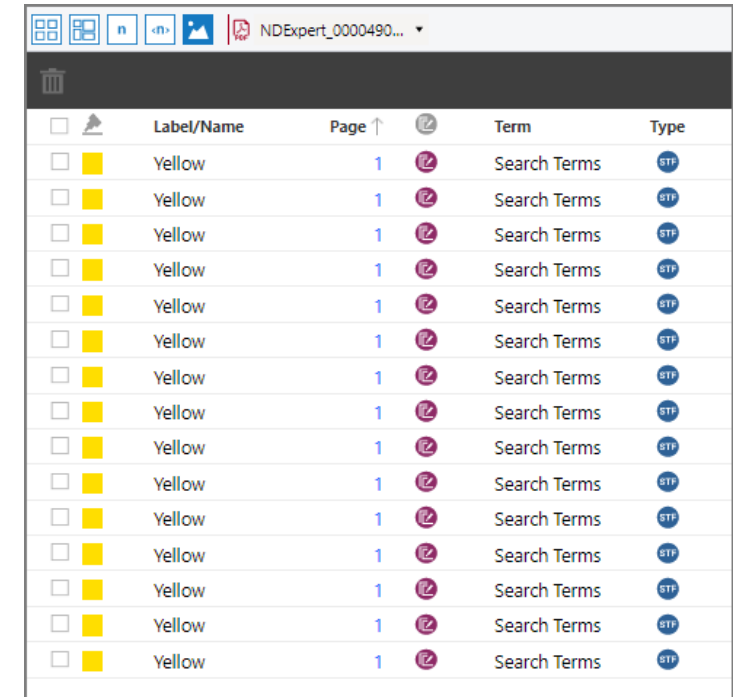
The document viewer displays a news release from ENRON titled "ENRON ENTERS INTO SETTLEMENT ON PROCEDURAL DISPUTE WITH DYNegy". The text includes details about a settlement with Dynegy, a lawsuit against Dynegy, and forward-looking statements. The ENRON logo is visible in the top left of the document.

Note: For detailed information about how to work with the Bulk Annotations feature, see **Work with Bulk annotations** in the online help.

REVIEW DOCUMENTS IN THE VIEW PANE: BULK ANNOTATIONS (2 OF 2)

The Annotation List pane contains the following columns:








- **Annotation type:** Select an annotation type to display. Options are **Black redactions**, **White redactions**, and **Highlights**.
- **Label/Name:** Filter by the label or the name of the annotation.
- **Page:** Displays the list of pages containing annotations in ascending or descending order. You can also filter the list of pages by entering a number that the page number you are looking for is less than, greater than, or equal to. To view the annotations on a specific page in the document, in the **Annotation List** pane, in the **Page** column, click a link.
- **Mass coded:** The mass coded icon indicates if it was a mass action to multiple documents at once. You can filter documents by **Single coded** or **Mass coded**.
- **Term:** This column displays the term used for the annotation. Enter text to filter by a specific term.
- **Type:** This column displays the source of the terms in the Term column. You can filter on any of the following types: **Advanced query syntax**, **Search Term Families**, or **Word or phrase**



<input type="checkbox"/>	<input type="checkbox"/>	Label/Name	Page ↑	<input type="checkbox"/>	Term	Type
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yellow	1	<input type="checkbox"/>	Search Terms	STP
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yellow	1	<input type="checkbox"/>	Search Terms	STP
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yellow	1	<input type="checkbox"/>	Search Terms	STP
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yellow	1	<input type="checkbox"/>	Search Terms	STP
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yellow	1	<input type="checkbox"/>	Search Terms	STP
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yellow	1	<input type="checkbox"/>	Search Terms	STP
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yellow	1	<input type="checkbox"/>	Search Terms	STP
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yellow	1	<input type="checkbox"/>	Search Terms	STP
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yellow	1	<input type="checkbox"/>	Search Terms	STP
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yellow	1	<input type="checkbox"/>	Search Terms	STP
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yellow	1	<input type="checkbox"/>	Search Terms	STP
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yellow	1	<input type="checkbox"/>	Search Terms	STP
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yellow	1	<input type="checkbox"/>	Search Terms	STP
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yellow	1	<input type="checkbox"/>	Search Terms	STP
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yellow	1	<input type="checkbox"/>	Search Terms	STP















VIEW PANE FEATURES (1 OF 2)

The following table describes the features in the **View** pane.

Element	Element Name	Purpose
	Formatted content	Displays the text extracted from a document, with simple formatting applied.
	Unformatted content	Displays the text extracted from a document without any formatting.
	Native	Displays a document in the native file format of the original application that created the document, using the Quick View Plus viewer.
	Office Online viewer	Displays native files in Microsoft Office Online directly in the browser.
	Image viewer	Displays image files, PDF documents, and media files.
	Quick code field and document type icon	<p>The icon shape indicates the document type.</p> <p>If quick coding is enabled, the color of the icon indicates the quick code value of the document. Click the document type button to apply a quick code to a document.</p>
	Quick code family field	A colored line next to the document type button indicates that the document is part of a document family. A document family consists of a source document and its attachments. The color of the line indicates the highest-ranking quick code that is applied to a document in the document family.
	Document ID	<p>The ID number of the document that appears in the View pane. The document ID is a unique number that is associated with each document in the database.</p> <p>The document that appears in the View pane is also referred to as the active document.</p>

VIEW PANE FEATURES (2 OF 2)

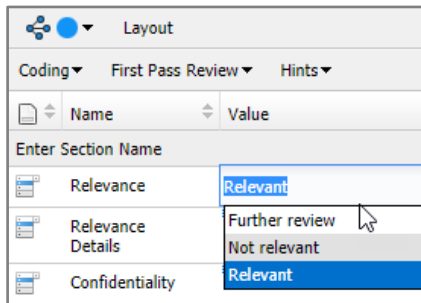
The following table describes the features in the **View** pane.

Element	Element Name	Purpose
	Hidden content warning	Indicates that a native file includes hidden content, such as tracked changes, speaker notes in a presentation, or hidden columns in a spreadsheet. Hover over the warning icon to determine the type of hidden content that the document contains.
	Truncated content warning	Indicates that a document is larger than the maximum file size set by your administrator. To see the whole document, switch to a different view or download the document.
1/17  	Keyword hit navigation	Displays the number of keyword hits in the document. To navigate between keyword highlights in the document, click the Next hit or Previous hit buttons. Note: If the document is larger than the maximum file size set by your administrator, only the number of visible keyword hits appears.
	Keyword summary	Allows you to review hits in a document in a more efficient manner and focus your review on the specific content immediately around the keyword highlights enabled in the formatted and unformatted content views.
	Keyword highlights	Displays keyword highlights and allows you to conduct ad hoc content searches.
	Find and redact	Allows you to find text in a searchable PDF document, and then add highlights or redactions to the text.
	Show hidden content	Displays hidden content in Microsoft Excel, Word, and PowerPoint documents.
	Update pages	Allows you to add or remove pages in a document, if you have permission to do so.
	Download	Downloads a document in its original file format.
	Batch print	Allows you to batch print documents.
	Document view history	Allows you to see who downloaded a document and when. You can also download a report.
	Collapse	Collapses the View pane.
	Maximize	Maximizes the View pane.

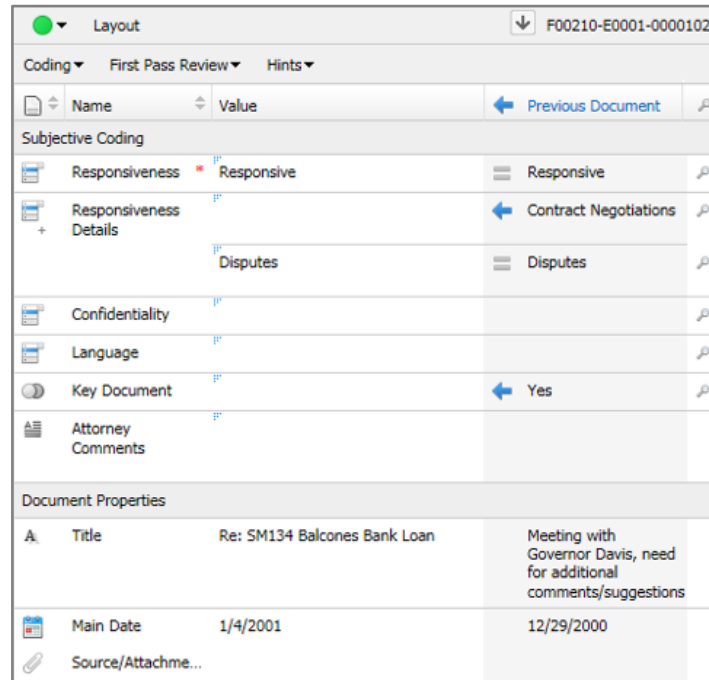
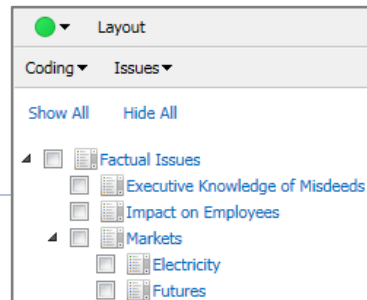
CODE DOCUMENTS IN THE CODE PANE

- To save field edits, press **Tab** or **Enter**.
- To delete field edits, click the field value, and then press **Delete**.
- Multivalue fields display a plus sign and allow you to code multiple values.
- When coding pick list fields with many values, type a few letters to narrow the list of values.

To edit a field, click in any field with a blue triangle and change its value. ▼

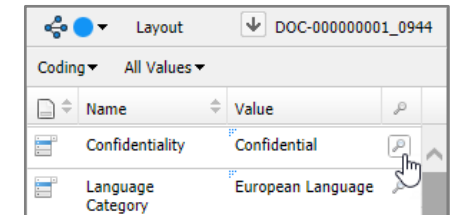


To apply issue coding, on the **All Values** menu, select Issues, and then select one or more check boxes. ▼

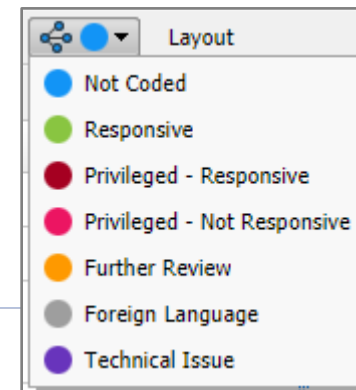


Tip: To apply values from the previously displayed document, select a coding template on the **All Values** menu, and then use coding hints.

To search for documents that have the same coding, click the magnifying glass. ▼



To apply a quick code, click the blue dot. ▼



CODE DOCUMENTS IN THE CONDITIONAL CODING PANE

In the **Conditional Coding** pane, you can code individual documents or mass code documents. When you code documents in the **Conditional Coding** pane using coding templates, you can quickly determine which fields, binders, and issues you should code depending on the values that you provide for related fields.

Note: To access this feature, add a **Conditional Coding** pane to your workspace.

🔄 To code individual documents, click the **Single coding** button on the toolbar, and then select a template from the list.

The screenshot shows the 'Conditional Coding' pane with a toolbar at the top containing a 'Single coding' button (a document icon with a plus sign) and a dropdown menu labeled 'Template with pick list fields'. The main area contains several coding fields:

- Pick list 1:1**: A dropdown menu with 'Not Coded' selected.
- Pick list 1:M**: Three checkboxes labeled 'item 1', 'item 2', and 'item 3', all of which are unchecked.
- Responsiveness**: Four radio buttons: 'Responsive' (green), 'Non Responsive' (orange), 'Further Review' (light blue), and 'Not Coded' (dark blue). 'Not Coded' is selected.
- Pick list 1:1**: A dropdown menu.
- Pick list 1:M**: A dropdown menu.
- Pick list 1:M [AC]**: A dropdown menu.
- Responsiveness**: Four radio buttons: 'Deferred' (light blue), 'Privileged' (green), 'Responsive' (orange), and 'Not Coded' (dark blue). 'Not Coded' is selected.
- DMMarks**: A section with a green checkmark on the left and five radio buttons: 'Deferred' (light blue), 'Privileged' (green), 'Responsive' (orange), 'Not Coded' (dark blue), and 'Non Responsive' (grey). 'Non Responsive' is selected.
- DMMarks [family]**: A dropdown menu with 'Non Responsive' selected.
- DMMarks**: A dropdown menu with 'Non Responsive' selected.

At the bottom, there is a toolbar with a document icon and a plus sign.

To code multiple documents, click the **Mass coding** button on the toolbar, and then select a template from the list. 🔄

The screenshot shows the 'Conditional Coding' pane with a toolbar at the top containing a 'Mass coding' button (a document icon with a plus sign) and a dropdown menu labeled 'Template with pick list fields'. A red warning banner at the top reads: 'The current values will be overridden. This cannot be undone.' The main area contains several coding fields:

- Pick list 1:1**: A dropdown menu.
- Pick list 1:M**: A dropdown menu.
- Responsiveness**: Four radio buttons: 'Responsive' (green), 'Non Responsive' (orange), 'Further Review' (light blue), and 'Not Coded' (dark blue). 'Not Coded' is selected.
- Pick list 1:M [AC]**: A dropdown menu.
- DMMarks**: A section with five radio buttons: 'Deferred' (light blue), 'Privileged' (green), 'Responsive' (orange), 'Not Coded' (dark blue), and 'Non Responsive' (grey). 'Not Coded' is selected.

Note: You can select a coding template created by your administrator or the **Active Quick Code, All Values, Binders, Issues, or Production - Unlocked** template.

Important: Applying mass coding will override the current values. This action cannot be undone.

CODE DOCUMENTS IN THE CONDITIONAL CODING PANE (CONT.)

After you code each object, the colors of the remaining objects change to indicate which items you still need to code.

The screenshot shows the 'Conditional Coding' pane for a document with ID 'ESSO.0012.0081'. The pane is divided into several sections, each with a green checkmark icon indicating a coding object. The sections are: 'Document ID' (text input), 'Responsiveness' (radio buttons for Responsive, Non Responsive, Further Review, Not Coded), 'Privilege' (radio buttons for Not Coded, Not Privileged, Privileged), 'For Further Review Type' (dropdown menu with 'Substantive' selected), 'YesNo' (Yes/No buttons), 'Pick list 1:M' (dropdown menu), 'Date 1:1' (date input), 'Text 1:M' (text input), 'Binder - Shared' (list of items: All ESSO, source/attach LFT Test, Timeline 100K, Timeline 50K), 'DMMarks' (dropdown menu with 'Non Responsive' selected), 'Text 1:1' (text input), and 'Number 1:M' (number input). At the bottom, there is a green bar with a checkmark and the text 'Coding is complete.' and a blue 'Next' button. Below that, a dark bar contains a pencil icon and a plus sign icon.

Objects that you have already coded appear in green, objects that your administrator does not expect you to code appear in gray, and objects that must still be coded appear in white.

If you code a value that is unexpected based on the other values that you have coded, the object appears in yellow and a warning message appears.

This close-up shows the 'Privilege' and 'Privilege Type' coding objects. The 'Privilege' object has three radio buttons: 'Not Coded', 'Privileged', and 'Not Privileged' (which is selected). The 'Privilege Type' object has two checkboxes: 'Attorney Client' (which is checked) and 'Work Product'. A yellow warning banner is visible at the bottom of the object, stating 'Value is coded, but not needed to complete this coding template.'

Tip: You can use coding macros to code a document to a predefined set of values by clicking a single button. You can also use coding macros to code a document with the same values as the previous document.

The screenshot shows the coding macro toolbar. It features a dropdown menu with the following options: 'Responsiveness' (Responsive, Confidential), 'Confidentiality' (Confidential), 'Privilege' (Privileged), and 'Privilege Type' (Attorney Client). Below the menu is a toolbar with five icons: a blue document icon, a radio tower icon with a '1', a checkered icon with a '2', a triangle icon with a '3', a starburst icon with a '4', and a plus sign icon.

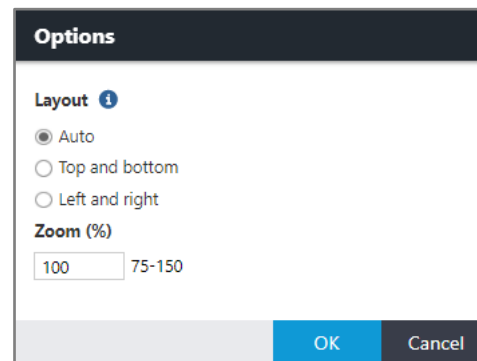
To create a new coding macro, click the plus (+) button on the macro toolbar.

Tip: To apply values from the previously displayed document, select a coding template on the **All Values** menu, and then use **Hints from previous**.

CUSTOMIZE THE LAYOUT IN THE CONDITIONAL CODING PANE

In the **Conditional Coding** pane, you can customize the layout of the coding field names and values in the **Single coding** and **Mass coding** views. On the menu in the **Conditional Coding** pane, select **Options**.

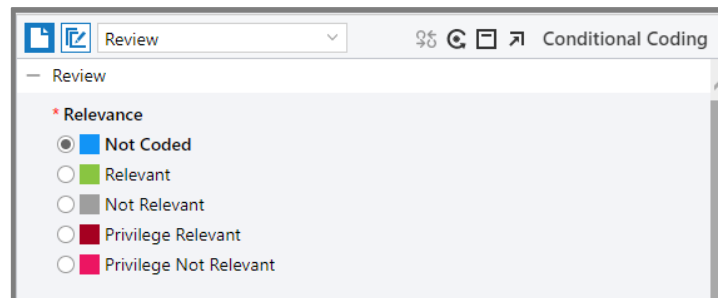
In the **Options** dialog box under **Layout**, select one of the following options:



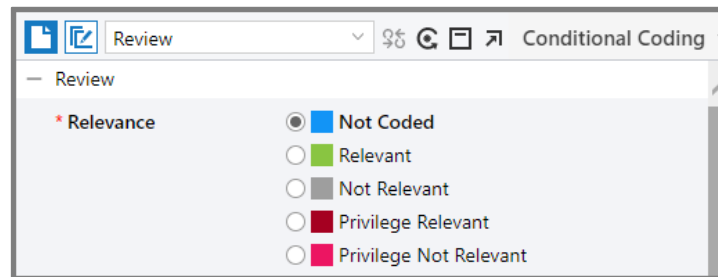
Tip: In the **Options** dialog box, under **Zoom**, you can change the zoom level to increase or decrease the display size of the content in the **Single coding** and **Mass coding** views. A smaller zoom level can be useful for showing more information on the screen.

Auto: With this option, which is selected by default, the application automatically adjusts the layout (top and bottom or left and right) of the field name and field values, depending on the width of the pane.

Top and bottom: If you select this option, the application always displays the field values underneath the field name.



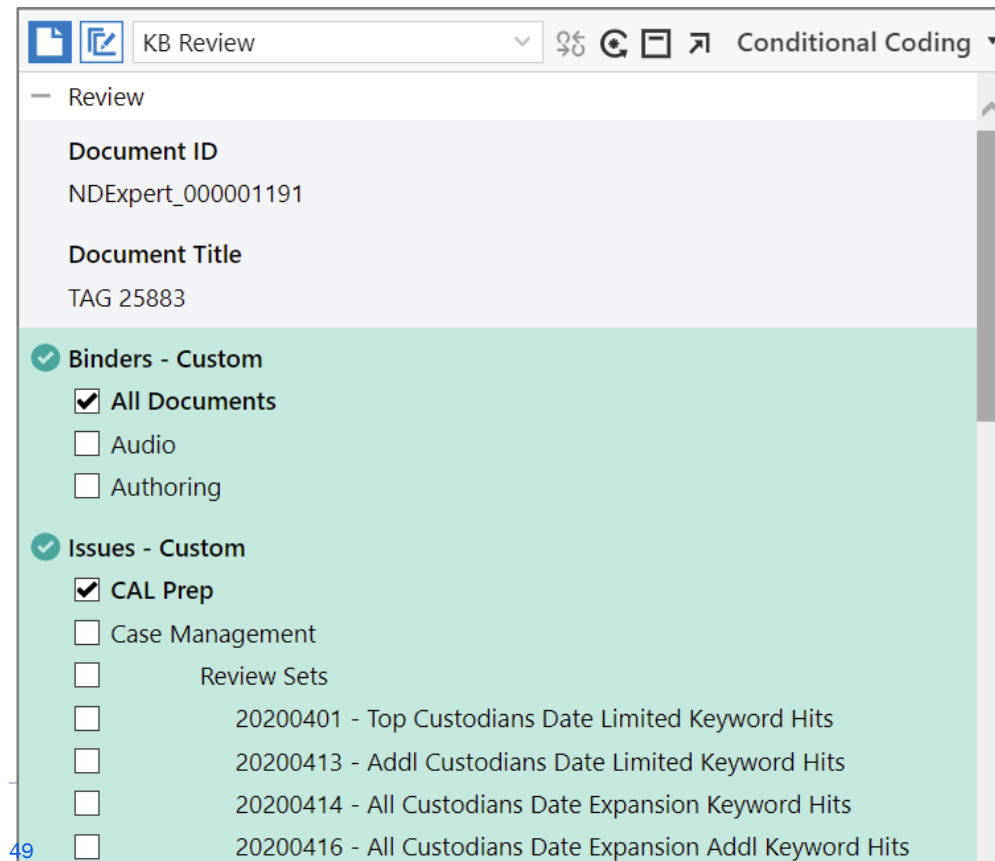
Left and right: If you select this option, the application always displays the field name on the left side of the pane and the field values on the right side of the pane.



CONDITIONAL CODING PANE: NEW FIELDS AVAILABLE FOR CODING

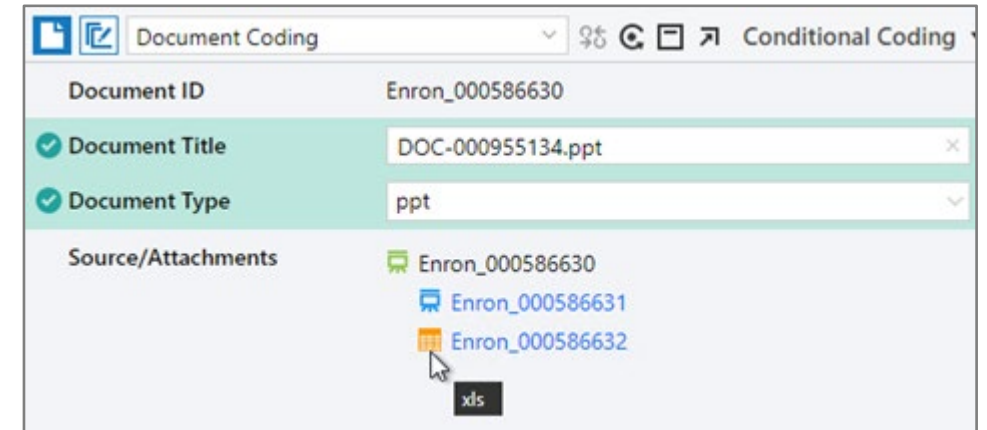
Binders - Custom and Issues - Custom fields

If your administrator added a **Binders - Custom** or **Issues - Custom** field to a conditional coding template, you can code documents to the binders or issues included in those fields.



Source/Attachments field

If your administrator added a **Source/Attachments** field to a conditional coding, you can use this field to see the position of a document within the tree of its related **Source/Attachments** documents.

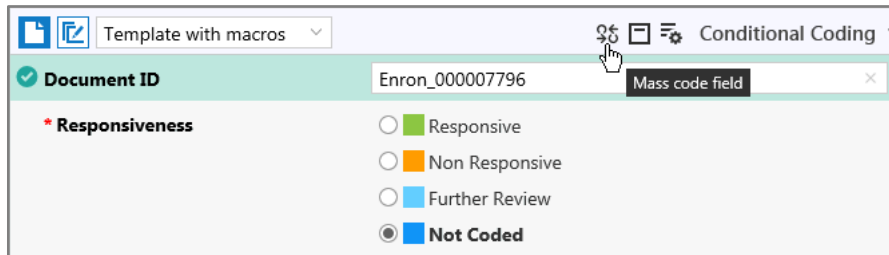


The current active document appears in black type, and the related document IDs are links that you can click to open each document in a standalone window. The icon and tooltip to the left of a document ID indicate the document type, and the icon color represents the coded value of the quick code field (if configured).

CONDITIONAL CODING PANE: MASS CODE FIELD FUNCTIONALITY

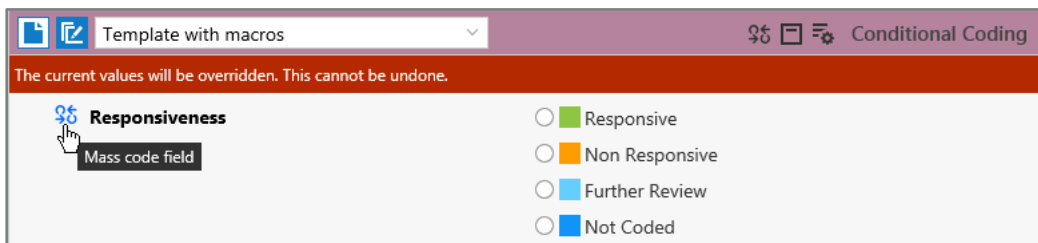
In the **Conditional Coding** pane, you can use the **Mass code field** functionality to add, remove, update, or find and replace coding fields.

On the **Single coding** tab, click the **Mass code field** on the toolbar.



The **Mass code field** dialog box appears, where you can add, remove, update, or find and replace coding fields.

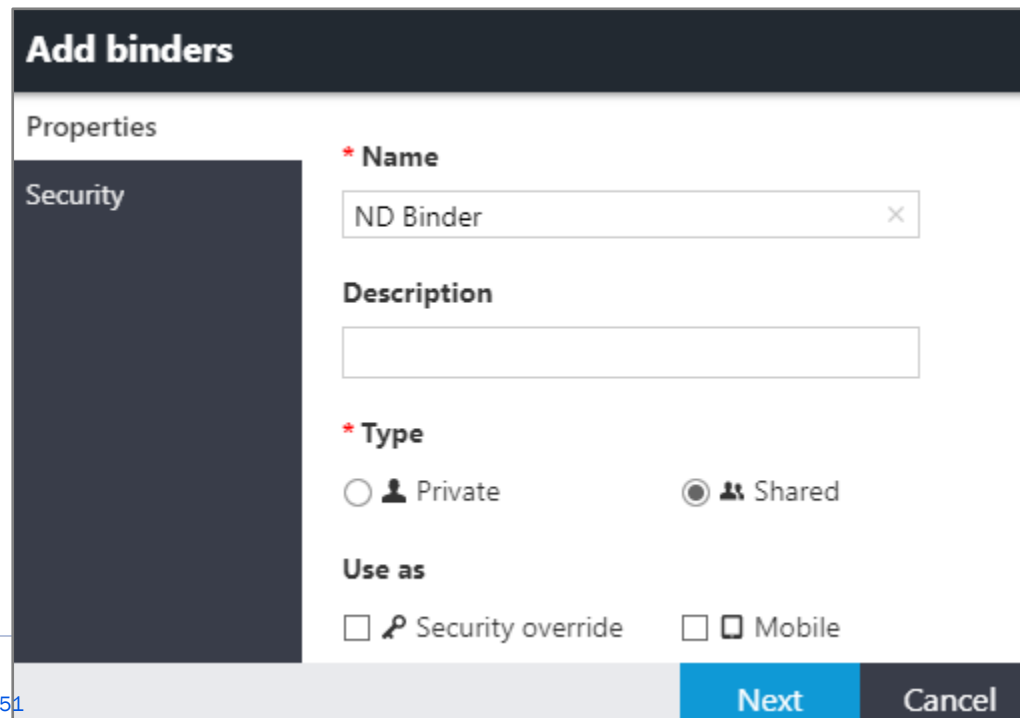
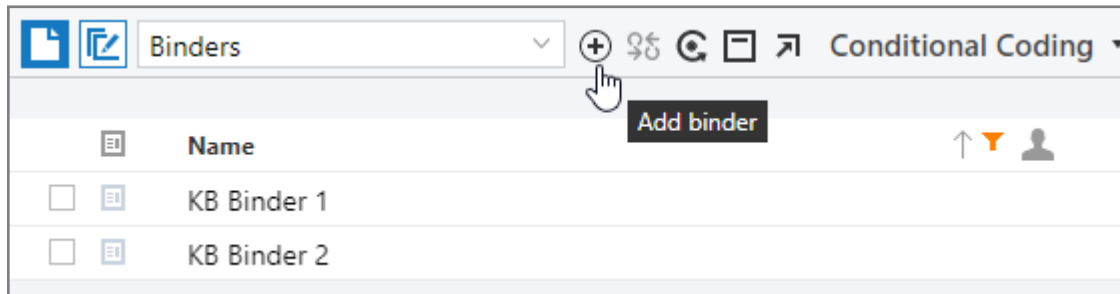
On the **Mass coding** tab, click the **Mass code field** button on the toolbar or the **Mass code field** button next to a field.



The **Mass code field** dialog box appears, where you can add, remove, update, or find and replace coding fields.

CONDITIONAL CODING PANE: ADD A BINDER ON THE FLY

In the **Conditional Coding** pane, administrators and group leaders who have permission to work with binders can add a binder on the fly.



The 'Add binders' dialog box is shown with the following fields and options:

- Name:** ND Binder
- Description:** (Empty text box)
- Type:** Private (selected), Shared
- Use as:** Security override, Mobile

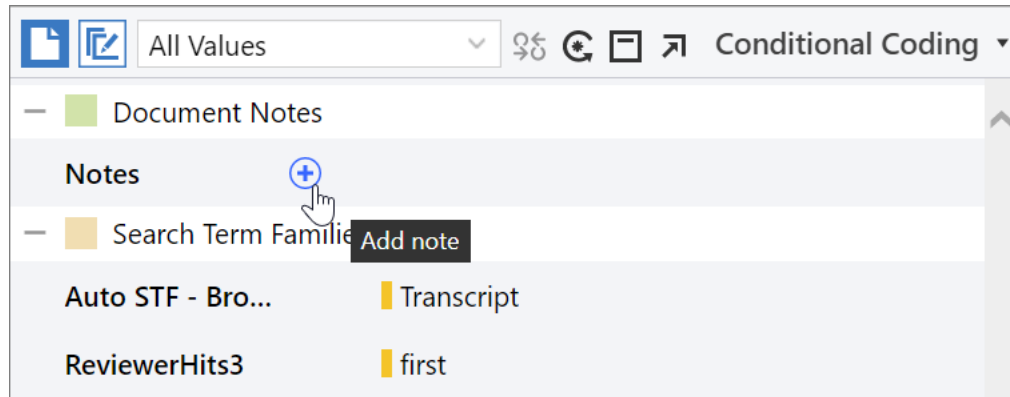
Buttons: Next, Cancel

When adding a binder, you can also set security for the binder.

Note: You must delete binders on the **Case Setup > Binders** page.

CONDITIONAL CODING PANE: NOTES FIELD

In the **Conditional Coding** pane, you can communicate with other reviewers by adding and replying to notes in a document. For example, you can use a note to ask your review lead a question about a document, and your review lead can add a reply to the note.



To add a note, select the **Notes** template or the **All Values** template. If your case administrator included the **Notes** field in your conditional coding template, select that coding template.

Click **Add note**.

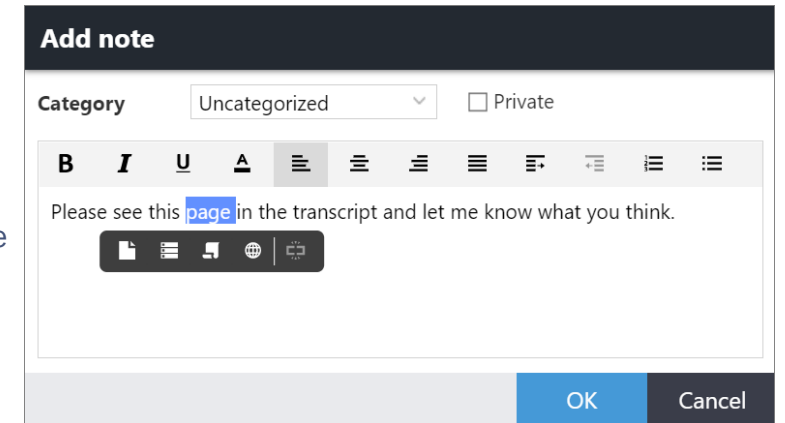
Optionally, select a category or hide the note from other users.

Note: Administrators can view private notes.

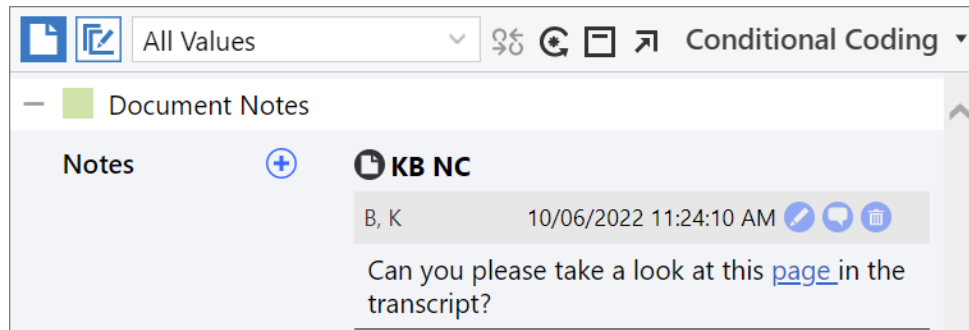
Enter the note text in the space provided.

Click **OK**.

Tip: You can add a link to a document, an object, a transcript, a transcript page, or a website to your note.

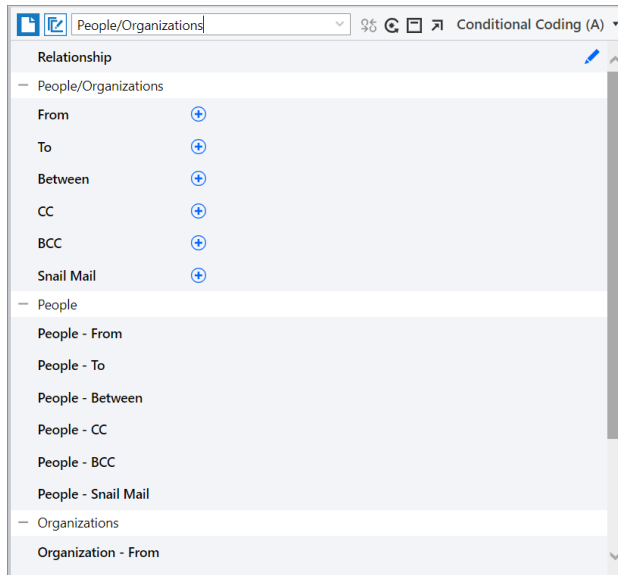


Notes appear in the **Conditional Coding** pane.



CONDITIONAL CODING PANE: PEOPLE/ORGANIZATION TEMPLATE

In the **Conditional Coding** pane, you can manually code documents with the names of relevant people or organizations. For example, if a document contains correspondence between different people, you can code the document with the names of the sender and recipients..



Reviewers with permissions can perform the following tasks with the People/Organizations template:

- Add people or organization coding to a document.
- Remove people or organization coding from a document.
- Add new people or organization names and relationships.
- Create new relationships between existing people and organizations.

To code a document with the names of people or organizations, in the **Conditional Coding** pane, select **People/Organizations** from the template menu at the top of the pane.

In the **People/Organizations** section, click the **Add value** button next to the correspondence field that you want to code.

In the **People/Organizations** dialog box, select people and/or organizations to code to the **Correspondence** field.

Note: The header on the **People/Organizations** dialog box changes to correspond to the correspondence field that you select.

Select **People** or **Organization** in the **View by** toggle.

To search for a person or organization name, begin typing the name in the search box at the top of the screen. Names appear on multiple rows if there are people and organization relationships that match the entry. You can code to the **Correspondence** field a person or organization alone or with a relationship.

Select the names in the list that you want to code. Selected names appear in the **Coded values** section on the right. To remove a name, click the **Remove** button to the right of the name or uncheck the name in the main list.

Click **Save**.

VIEW AN AUDIT HISTORY OF CODING CHANGES

The application retains an audit history of the coding changes that users make to field values.

The **Coding History** feature also captures audit records for field values that are updated by import jobs for existing document records.

The **Coding History** pane includes the current and previous values of each field, the name of the user who made the change, and the date and time of the change. It also indicates whether the value was added, updated, or deleted and whether the value was bulk coded.

Field	Value	Previous value			Date	User
Relevance [family]	Privilege Relevant		+		4/16/2020 11:03:54 AM	Ch...
Relevance	Privilege Relevant		+		4/16/2020 11:03:54 AM	Ch...
Production	DEMO NEVIN clone		+	⌘	4/22/2020 12:26:13 PM	Tic...
Production	DEMO NEVIN		+	⌘	4/21/2020 7:10:22 PM	Ch...
Production	ABC		+	⌘	4/16/2020 11:59:04 PM	Ch...
Priv Log Topic	client agreement		+		4/16/2020 11:36:25 AM	Ch...
Priv Log Status	Privilege Complete		+		4/16/2020 11:36:27 AM	Ch...
Priv Log Reason	prepared at the dir...		+		4/16/2020 11:36:21 AM	Ch...
Priv Log Doc Type	eMail	Agreement	+		4/16/2020 11:36:55 AM	Ch...
Priv Log Doc Type	Agreement		+		4/16/2020 11:36:10 AM	Ch...
Custodian	Dennis Roberts		+	⌘	4/16/2020 3:31:16 PM	Ch...
Binder	Important Docume...		+	⌘	4/16/2020 11:46:51 PM	Ch...
Binder	Email Threading		+	⌘	4/16/2020 11:29:32 PM	Ch...
Binder		Important Documents	✖	⌘	4/16/2020 11:16:33 PM	Ch...

Tip: On the **Search** page, you can use the **previous value ever was** operator to search for coding history changes for certain fields, for example, date, population, issues, and more.

(This operator does not support Memo field types.)

VIEW AND AUDIT THE CODING HISTORY

To view the coding history for a series of documents, you can add a **Coding History** pane to your workspace.

Or, to open the **Coding History** pane in a standalone window, you can click **Coding history** on the **Options** menu in the **List** pane or click the **Coding history** button in the **Conditional Coding** pane.

Optionally, select a conditional coding template in the list at the top of the pane.

To see a list of all coding changes, click the **History ungrouped** button. To see a list of coding changes grouped by field name, click the **History grouped by coding field** button. You can sort and filter the columns in both lists.

You can also download the data in the **Coding History** pane to a spreadsheet (.csv file).

Tip: To download a report with the history for a field for all documents selected in the **List** pane, select the **Coding history report** option on the **Tools** menu.

Fields / Values	Previous values		Date		User
Confidentiality					
Confidential	Not Confidential	✏	6/6/2017	5:13 PM	Doe, Jane
Not Confidential	Confidential	✏	6/6/2017	5:06 PM	Doe, Jane
Confidential		+	6/6/2017	5:06 PM	Doe, Jane
Further Review Type					
	Technical Issue	✖	6/6/2017	5:17 PM	Smith, John
Technical Issue		+	6/6/2017	5:07 PM	Doe, Jane
Privilege					
Privileged		+	6/6/2017	5:18 PM	Smith, John
	Not Privileged	✖	6/6/2017	5:06 PM	Doe, Jane
Not Privileged		+	6/6/2017	5:06 PM	Doe, Jane
Privilege Type					
Work Product		+	6/6/2017	5:18 PM	Smith, John
Relevance					
Not Relevant		+	6/6/2017	5:18 PM	Smith, John
Responsiveness					
Responsive		+	6/6/2017	5:18 PM	Smith, John
	Not Responsive	✖	6/6/2017	5:07 PM	Doe, Jane
Not Responsive		+	6/6/2017	5:06 PM	Doe, Jane

WORK WITH THE COMPARE PANE

In the **Compare** pane, you can view the differences between the text of two documents.

To compare two documents, you anchor one of the documents that you want to compare. Select the document, and then click the **Set active document as anchor** button on the Compare pane toolbar. The first document is anchored in the left pane.

Then, select a second, similar document in the **Related** pane, the **List** pane, or the **Map**. In the **Compare** pane, the anchored document in the left pane remains unchanged. The second document that you selected, which is now the active document, appears in the right pane. The differences between the two documents are marked in red.

Tip: To locate documents that are good candidates for comparison, add a **Related** pane to your workspace. In the **Related** pane, in the **Similar** section, you can see a list of documents that share the same concepts.

The **Compare** pane is available for documents without branded redactions. The maximum file size is 3 MB.

The screenshot displays the 'Compare' pane with two email documents side-by-side. The left pane shows an email titled 'FW: Raptor Debris' with redaction boxes. The right pane shows an email titled 'RE: Raptor Debris' with redaction boxes. The differences between the two documents are highlighted in red.

Left Pane (Anchored):

FW: Raptor Debris

From: buy, Rick
<"/o=enron/ou=na/cn=recipients/cn=rbuy">

To: gorte, David
<"/o=enron/ou=na/cn=recipients/cn=dgorte">
bradford, "William S."
<"/o=enron/ou=na/cn=recipients/cn=wbradfo">
port, David
<"/o=enron/ou=na/cn=recipients/cn=dport">

Date: Wed, 03-Oct 2001 23:51:40 +0100

fyi, lets have a mtg.
Original Message
From: Baker, Ron
Sent: Wednesday, October 03, 2001 2:02 PM
To: Buy, Rick
Subject: FW: Raptor Debris

Rick,
Let me know if you would like to get together to discuss how the Raptor unwind is accomplished from a mechanical standpoint, as well as, what comes back to Enron in the transaction. I would happy to sit down and walk you through it. Just let me know when might work for you to get together. Thanks Rick,
Ron Baker

-----Original Message-----
From: Causey, Richard
Sent: Wednesday, October 03, 2001 11:35 AM
To: Buy, Rick; Glisan, Ben; Baker, Ron; Butts, Bob; Colwell, Wes
Cc: Gorte, David
Subject: RE: Raptor Debris

I think that all investments that were hedged in Raptor are on th MPR and are being monitored and reported against. Is this true? Ron, will you take the lead in making sure we have a smooth transition on this? Thanks

Right Pane (Active):

RE: Raptor Debris

From: Glisan Ben <ben.glisan@enron.com>

To: Causey, Richard <richard.causey@enron.com>
Buy, Rick <rick.buy@enron.com>, Baker, Ron <ron.baker@enron.com>, Butts, Bob <bob.butts@enron.com>, Colwell, Wes <wes.colwell@enron.com>

Cc: Gorte, David <david.gorte@enron.com>, Mckean, George <george.mckean@enron.com>, Mckillop, Gordon <gordon.mckillop@enron.com>

Date: Tue, 09 Oct 2001 18:45:46 +0100

George & Gordon

Please work with RAC (Dave Gorte) to ensure that all of the Raptor Investments are being monitored.

Ben

-----Original Message-----
From: Causey, Richard
Sent: Wednesday, October 03, 2001 11:35 AM
To: Buy, Rick; Glisan, Ben; Baker, Ron; Butts, Bob; Colwell, Wes
Cc: Gorte, David
Subject: RE: Raptor Debris

I think that all investments that were hedged in Raptor are on th MPR and are being monitored and reported against. Is this true? Ron, will you take the lead in making sure we have a smooth transition on this? Thanks

-----Original Message-----
From: Buy, Rick
Sent: Wednesday, October 03, 2001 9:38 AM
To: Causey, Richard; Glisan, Ben
Cc: Gorte, David
Subject: Raptor Debris

Now that Raptor is blown up, should we begin valuation efforts of assets and include in merchant portfolio. I am

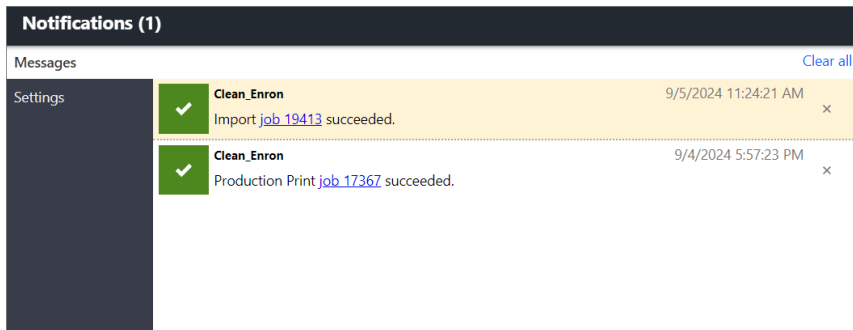
WORK WITH NOTIFICATIONS

When you have a new notification, the bell icon on the top navigation bar turns orange and displays the number of notifications received.



Click the bell from anywhere in Nuix Discover to open the **Notifications** window, where you can view and manage notifications.

On the **Messages** tab of the **Notifications** window, new notifications are highlighted in yellow.



The notification message contains the following information:

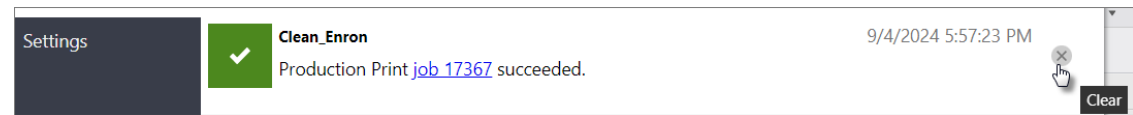
- The icon next to each message indicates the job's final status:
 - Completed: Jobs that are complete
 - Completed with warnings: Jobs that are complete but produced warnings
 - Error: Jobs that are not complete due to an error
- The Job ID is a link to the job stages on the portal **Processing** page.

Note: Informational notifications configured by your administrator that are not related to submitted jobs also appear on the **Messages** tab. The **Messages** tab displays up to 100 messages.

Delete all job notifications by clicking **Clear all**.



Delete job notifications individually by clicking the **Clear** icon next to the notification you want to delete



SUBSCRIBE TO NOTIFICATIONS

Subscribe to notifications that alert you when submitted jobs are completed.

Subscribe to job notifications on the **Settings** tab. Click **All jobs that you submit** to subscribe to all jobs that you submit. Use the **Subscribe to notifications** menus to select specific cases and job types to receive notifications for jobs submitted by other users.

Note: You can only subscribe to jobs for cases that you have permissions to access.

Click **Email notifications** to also receive notifications by email.

Note: Email notifications are not available if you do not have an email address configured. Your system administrator must enable email notifications in order for the option to work.

Notifications

Messages

Settings

Subscription settings

All jobs that you submit

Email notifications ⓘ

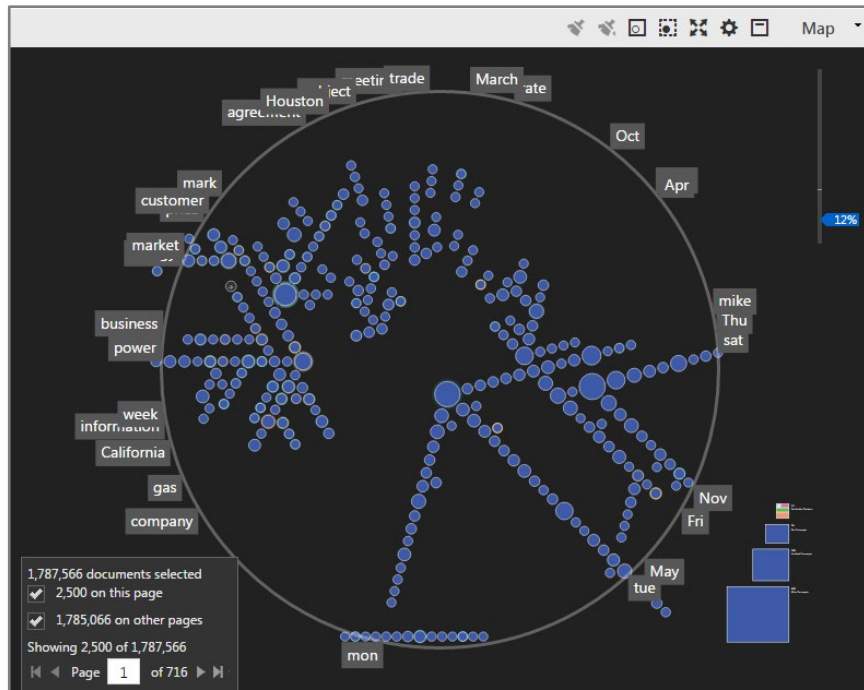
Subscribe to notifications

Clean_Enron Select a job type +

Case	Category Name	
Clean_Enron	Import	⊖
Clean_Enron	Ingestion	⊖
Clean_Enron	Production Print	⊖

To view all notifications, click the **My Notifications** link to navigate to the Portal Notifications area.

WORK WITH THE MAP



The **Map** pane is an alternate view of documents in an assignment or a search results set in which documents are clustered based on the similarity of concepts.

You can navigate from document to document, view relationships between documents, search documents, and code documents while viewing the Map.

You can display up to 10,000 documents per page.

You can perform the following tasks with the Map:

- Review documents based on their concepts.
- Explore concepts that tend to appear together in selected documents.
- Find documents that share common concepts.
- Apply quick codes to one or more documents directly in the Map.
- Find documents that have the same quick code or the same family quick code.
- Select multiple documents for a bulk action, such as coding or adding documents to a binder.
- Search the Map for keywords to locate clusters and documents with those terms.
- Select a document to preview in the View pane or in a standalone workspace.
- Discover new concepts in the documents.

MAP ELEMENTS

The **Map** pane contains the following elements:

- **Concept cluster:** A group of documents in a spiral arrangement in a circle. The circle may appear solid when you first open the Map, indicating that all the documents in the cluster have the same quick code value. You can configure the Map to always display individual document dots.
- **Cluster tooltip:** A tooltip that appears when you hover over a cluster. The tooltip displays the concept shared by clusters displayed on the spine. When spines intersect, multiple concepts display at the top of the tooltip. The tooltip displays the top concept, the next highest six concepts, the number of documents in the cluster, the percent of documents coded, and the top document titles in the cluster. You can configure the Map to position the tooltip in the corner of the pane.
- **Spine:** A line that connects clusters that have one or more significant concepts in common. Along a spine, documents in adjacent clusters are more similar to each other than to documents in clusters that are farther away.
- **Spine label:** The concept that clusters in a spine have in common. The spine label appears around the concept compass. Spine labels can provide a quick overview of the key concepts in an area of the Map.
- **Concept compass:** The ring that surrounds concept clusters. Clusters can appear inside or outside the ring depending on the cluster configurations.
- **Set-aside clusters:** Square containers, or clusters, in the lower right for storing coded documents. The color indicates the quick code value. Use the **Quick Codes** section in the **Browse** pane to move documents between the Map and the set-aside clusters.
- **Triangle:** Indicates the active document.
- **Map menu:** The menu associated with the Map pane that lists options for using and configuring the Map. You can pin the options on the menu to the Map toolbar for easy access.
- **Page navigation window:** A small window on the side of the Map that appears when the Map includes more documents than can be displayed on one page. Use the navigation controls to move through documents on additional pages of the Map. You can configure the number of documents to view per page on the Map pane's Options menu.
- **Zoom slider:** A vertical control on the right side of the Map that allows you to zoom in and out of clusters.

WORK WITH THE RELATED PANE

In the **Related** pane, you can review documents that are related to each other based on threaded relationships, source and attachment relationships, or similarity of concepts.

The **Related** pane includes the following sections:

- **Sources and attachments:** Displays the active document and any documents with a source or attachment relationship to the active document.
- **Threading:** Displays the active document and a list of documents with a threaded relationship to the active document.
- **Similar:** Displays the active document and a list of documents that share at least 70% of the same concepts. The number in the Similarity column indicates the fraction of concepts that the documents share in common.

You can perform the following tasks:

- Change the active document within a document family
- See the coding for related documents
- Apply quick codes to documents
- Review the documents that are similar to each document in a thread by pivoting from document to document
- Maximize a section, or collapse or expand sections

The screenshot shows the 'Related' pane for document ESSO.0627.0071. It is divided into three sections:

- Sources and attachments:** A table with columns 'Document Title' and 'Document ID'. It lists four documents: 'LFD Fire Systems Eng Tests' (ESSO.0627.0071), 'Test Results for Each Component of Test' (ESSO.0627.0073), 'Fire System Checks' (ESSO.0627.0074), and 'Transfer Line Test Procedure' (ESSO.0627.0075).
- Threading:** A table with columns 'Document Title', 'Thread Data', and 'Document ID'. It lists the same four documents as the 'Sources and attachments' section.
- Similar:** A table with columns 'Document Title', 'Similarity', and 'Document ID'. It lists one document: 'LFD Fire Systems Eng Tests' with a similarity of 100 and ID ESSO.0627.0071.

WORK WITH THE RELATED PANE (CONTINUED)

If your results set includes **data model entities**, you can also use the **Related entities** feature to view related entities or the **Related Entities Mapper** feature to view a visual representation of related entities.

A **data model** is a representational model of interconnected information that you want to track or analyze. A data model consists of a set of **entities**, such as documents, collections, or custodians, and the connections between those entities. The connections between interrelated entities allow you to answer complex questions about the data within the data model.

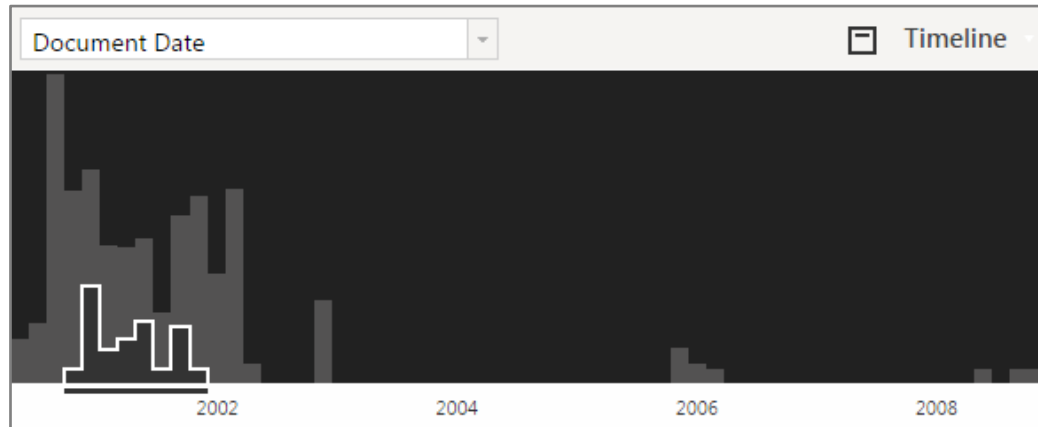
The screenshot displays the 'Related' pane interface. On the left, a table lists document details:

Document Title	Document Date	Document ID
.00 - Bonus Pilot Episode - G...	6/28/2018	Audio_000000075
.00 - Bonus Pilot Episode - G...	6/28/2018	Audio_000000018
.0002 - We Are Back & Better...	6/28/2018	Audio_000000046
.0002 - We Are Back & Better...	6/28/2018	Audio_000000110
.001 Exposing the Filter.mp3	6/28/2018	Audio_000000056
.001 Exposing the Filter.ogg	6/28/2018	
.001 Intro.mp3	6/28/2018	

On the right, the 'Related Entities Mapper' shows a grid of orange circles representing a data model. Below it, a diagram illustrates the relationships between entities: Evidence, Notice, Custodian, and Document (1149). The diagram shows connections between Evidence and Notice, Evidence and Custodian, and Custodian and Document. A context menu is open over the Custodian entity, showing options: 'Add new' (with a sub-menu for Evidence and Notice), and 'Connect existing' (with a sub-menu for Evidence and Notice).

WORK WITH THE TIMELINE

In the **Timeline** pane, you can review the distribution of documents over time and determine how they intersect with other information, such as concepts, quick codes, content searches (find), and search term families.



You can perform the following tasks:

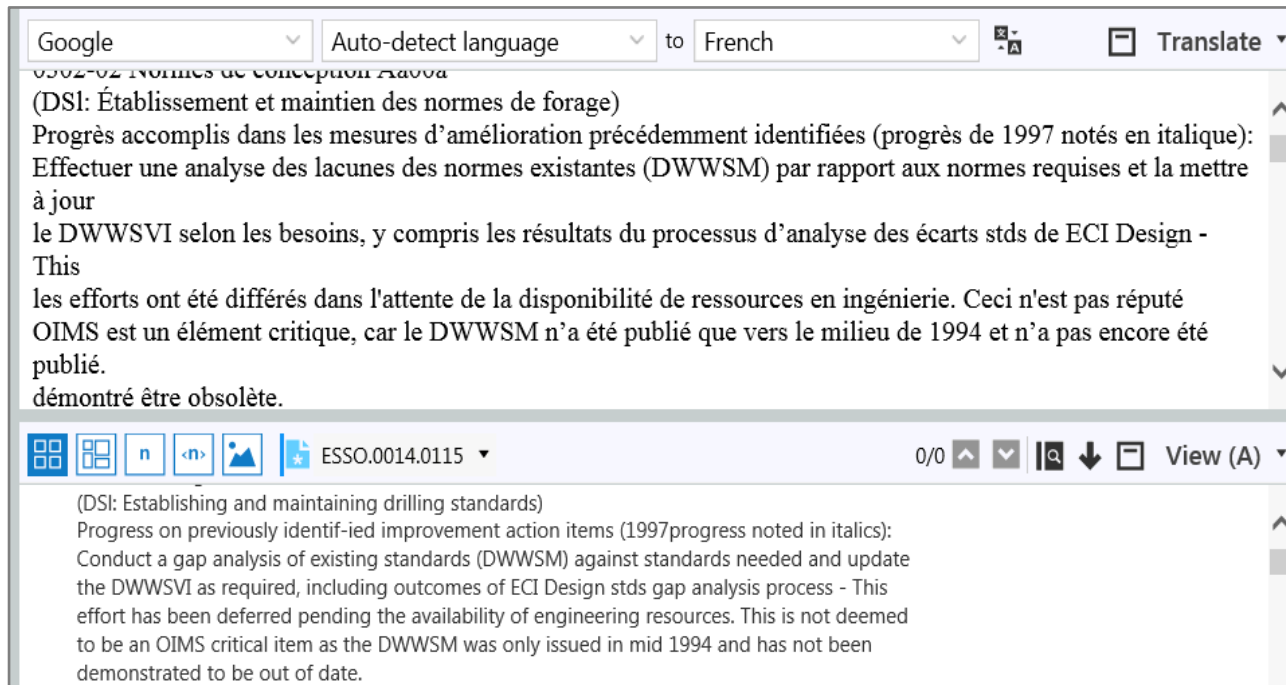
- Select documents in a time range, a specific time interval, or a selection of specific time intervals.
- As a reviewer, select a different Timeline date field to use during a review. The time field used to configure the Timeline is set at the case, group, and user level.

You can use the **Timeline** feature with result sets up to 50,000 documents.

TRANSLATE DOCUMENTS

You can use the Translate feature to submit documents for machine translation using a Google or Microsoft service. You can select from many source languages, and you can currently translate into the following target languages: **Chinese (Simplified), Chinese (Traditional), English, French, German, Italian, Japanese, Korean, Russian, Spanish.**

Note: Documents with branded redactions are not translated.



The screenshot shows a document translation interface. At the top, there are dropdown menus for the translation service (Google), the source language (Auto-detect language), and the target language (French). A 'Translate' button is visible. Below the controls, the original text in French is displayed, followed by its English translation. The text is: (DSI: Établissement et maintien des normes de forage) Progrès accomplis dans les mesures d'amélioration précédemment identifiées (progrès de 1997 notés en italique): Effectuer une analyse des lacunes des normes existantes (DWWSM) par rapport aux normes requises et la mettre à jour le DWWSVI selon les besoins, y compris les résultats du processus d'analyse des écarts stds de ECI Design - This les efforts ont été différés dans l'attente de la disponibilité de ressources en ingénierie. Ceci n'est pas réputé OIMS est un élément critique, car le DWWSM n'a été publié que vers le milieu de 1994 et n'a pas encore été publié. démontré être obsolète. The English translation below reads: (DSI: Establishing and maintaining drilling standards) Progress on previously identified improvement action items (1997 progress noted in italics): Conduct a gap analysis of existing standards (DWWSM) against standards needed and update the DWWSVI as required, including outcomes of ECI Design stds gap analysis process - This effort has been deferred pending the availability of engineering resources. This is not deemed to be an OIMS critical item as the DWWSM was only issued in mid 1994 and has not been demonstrated to be out of date.

Note: When you submit a document for translation, the translated text propagates across all duplicates of the document, so that you do not have to translate each duplicate document individually.

WORK WITH AUDIO DOCUMENTS

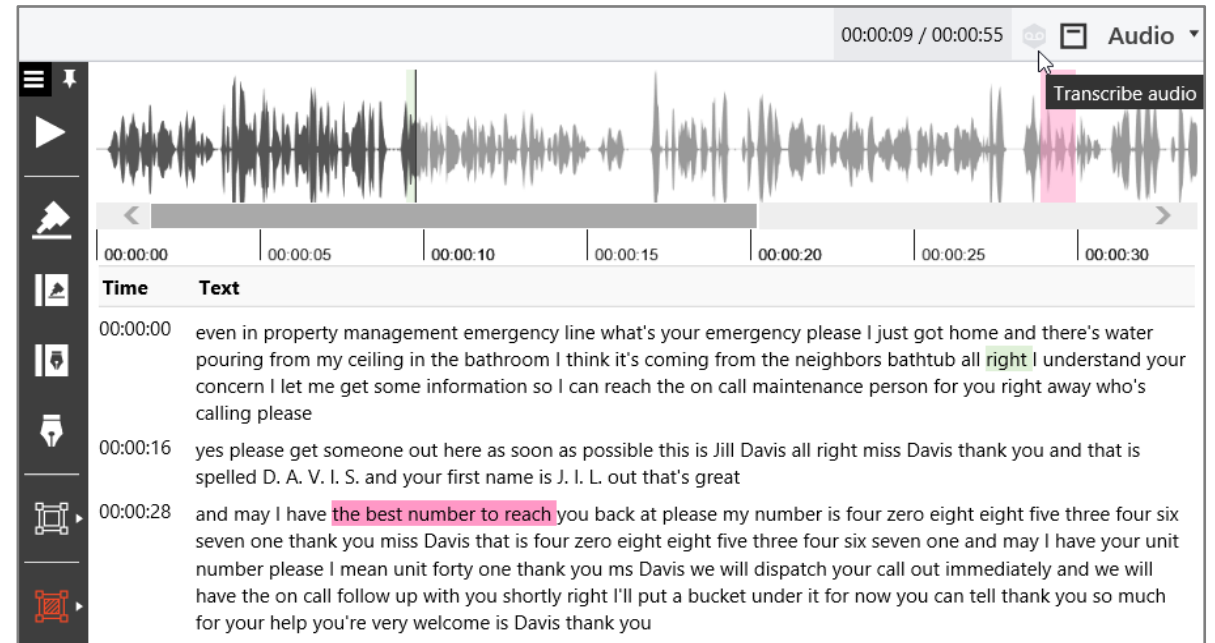
You can use the **Audio** feature to transcribe individual audio documents or multiple audio documents. After the documents are transcribed, you can search for, review, redact, and produce the audio documents. You can specify a language model before you transcribe an audio document, for example, if you know that the audio in a document uses British English instead of American English. You can also resubmit previously transcribed documents.

The quality of the original audio file has a big impact on the accuracy of the transcribed text. Factors that can work against speech-to-text accuracy include a lot of background noise or instances where multiple people are talking simultaneously. For these reasons, in addition to reviewing the transcribed text, we also recommend listening to the original audio file.

The Audio feature supports the following audio file types: .aif, .aifc, .aiff, .au, .mp3, .oga, .snd, .wav, .wma.

Note: Video files are not currently supported.

The Audio feature supports the following language models: Arabic (Modern Standard), Chinese (Mandarin), English (Australian), English (UK), English (US), French, French (Canadian), German, Italian, Japanese, Korean, Portuguese (Brazilian), Spanish, and Spanish (Latin America).



The screenshot displays the Audio feature interface. At the top, there is a progress bar showing 00:00:09 / 00:00:55. Below the progress bar is a waveform representing the audio file. A pink highlight is visible on the waveform, corresponding to a segment of the transcribed text. A 'Transcribe audio' button is located in the top right corner of the interface. Below the waveform is a table with two columns: 'Time' and 'Text'. The table contains three rows of transcribed text, with the third row having a pink highlight under the phrase 'the best number to reach'.

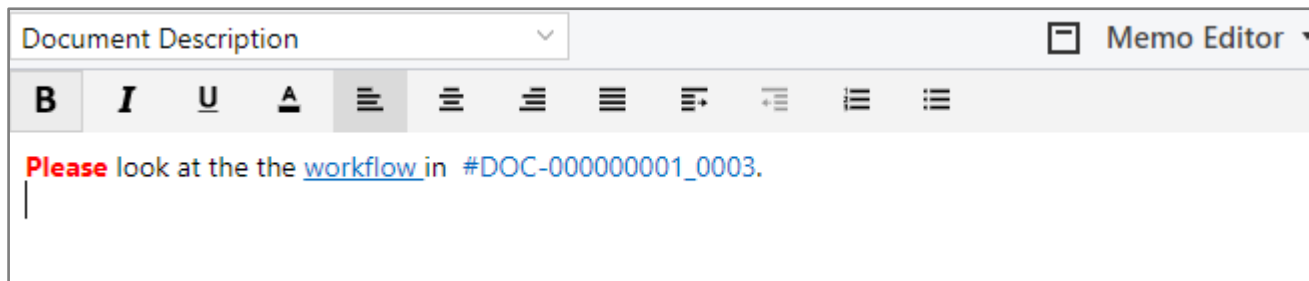
Time	Text
00:00:00	even in property management emergency line what's your emergency please I just got home and there's water pouring from my ceiling in the bathroom I think it's coming from the neighbors bathtub all right I understand your concern I let me get some information so I can reach the on call maintenance person for you right away who's calling please
00:00:16	yes please get someone out here as soon as possible this is Jill Davis all right miss Davis thank you and that is spelled D. A. V. I. S. and your first name is J. I. L. out that's great
00:00:28	and may I have the best number to reach you back at please my number is four zero eight eight five three four six seven one thank you miss Davis that is four zero eight eight five three four six seven one and may I have your unit number please I mean unit forty one thank you ms Davis we will dispatch your call out immediately and we will have the on call follow up with you shortly right I'll put a bucket under it for now you can tell thank you so much for your help you're very welcome is Davis thank you

WORK WITH THE MEMO EDITOR (1 OF 3)

The **Memo Editor** pane includes formatting capabilities, a new and quicker way of creating and removing links, and a new feature for downloading memos in a Hypertext Markup Language (HTML) format.

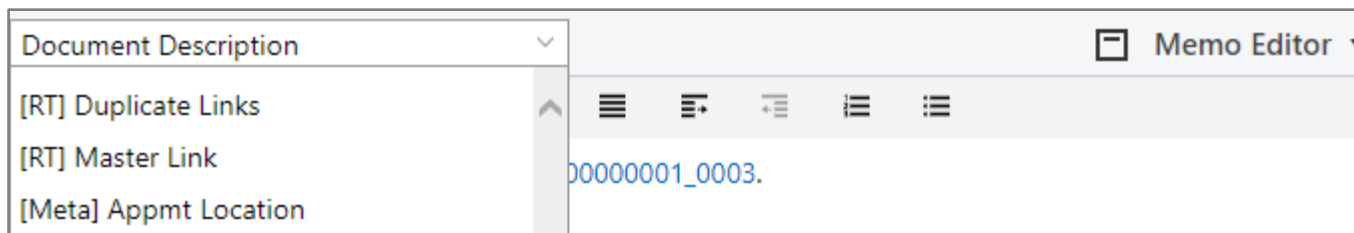
The Memo Editor pane is available for documents and entities.

Note: You can still use the existing editor capability within memo fields.



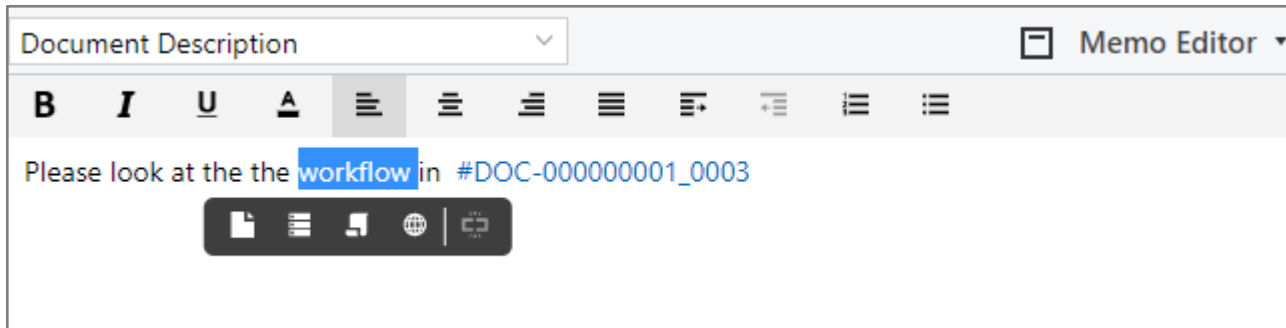
Memo field selection: To switch between the active memo fields, click the drop-down list on the toolbar and select a field. You can select the Comments, Timelines Description, [Meta] Chat HTML, and Document Description fields, as well as many others.

Note: From the memo fields list, the **Memo Editor** pane allows you to access only the one-to-one memo fields.

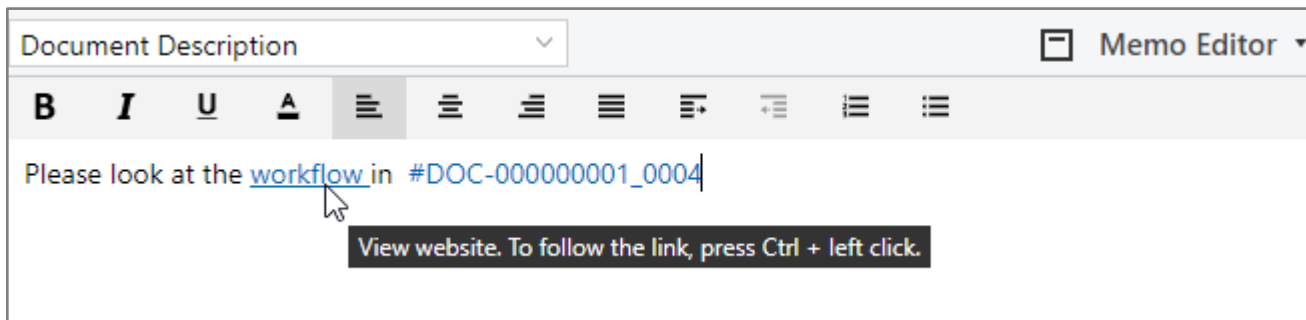


WORK WITH THE MEMO EDITOR (2 OF 3)

Hyperlinks: Creating hyperlinks to documents, binders, transcripts, or other data takes fewer mouse clicks using the **Memo Editor** pane. Hyperlinking is available for documents and entities.



After selecting a link option, a dialog box appears that allows you to search for and select the link data.



Note: You cannot edit the text in existing links. You must first remove the link, then correct spelling errors or other mistakes made in the link text.

When you enter text to create a link and either double-click or highlight the text, an inline menu appears that contains the **Document link**, **Object link**, **Transcript link**, **Web link**, and **Remove link** options.

To view link contents, each link contains a tooltip that appears when you point to an existing link.

Linked content opens when you hold down the **Ctrl** key on the keyboard and click the mouse.

To remove a link, double-click the link and select **Remove link**.

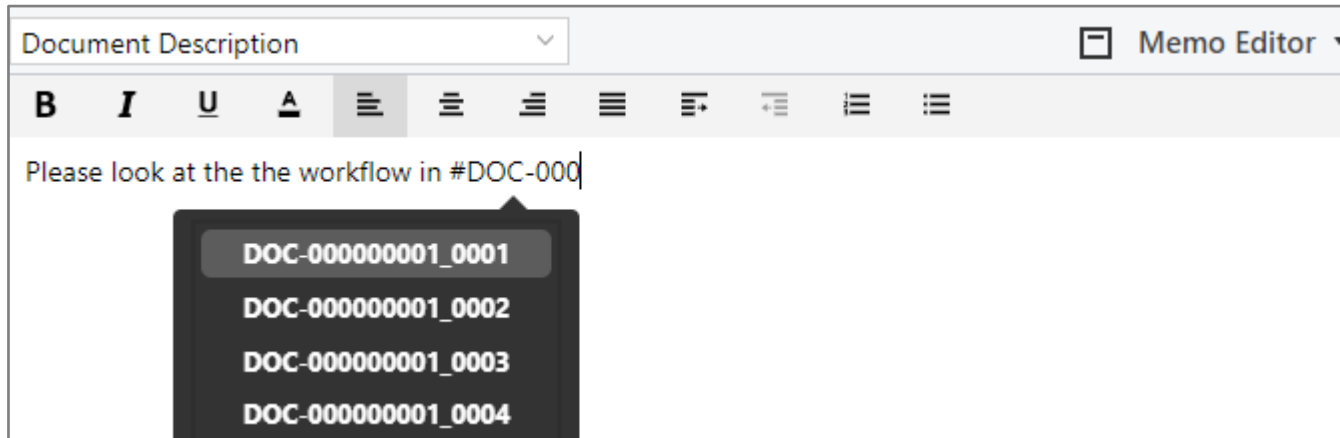
WORK WITH THE MEMO EDITOR (3 OF 3)

Auto-search linking: The **Mentions** feature allows you to do a quick search for document links.

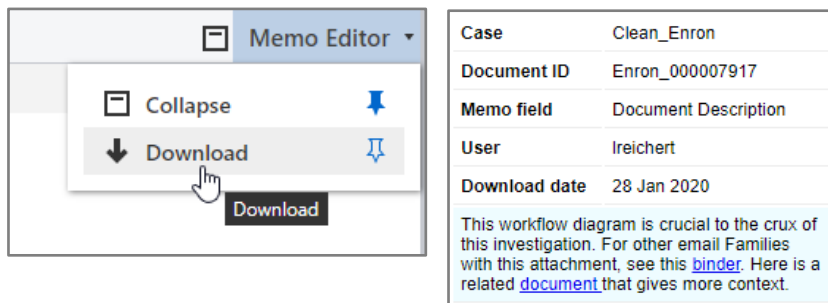
When you type the **hash (#)** sign, followed by six or more characters of a Document ID, an inline list appears with matching search results.

Select an item from this list to automatically create a link to the selected document and insert the link into the memo.

Note: You cannot create a link back to an active document.



Downloading: The **Download** option allows you to export memos to HTML.



The top portion of the HTML file shows general information such as the **Case**, **User**, **Download date**, and other information. Memo text follows.

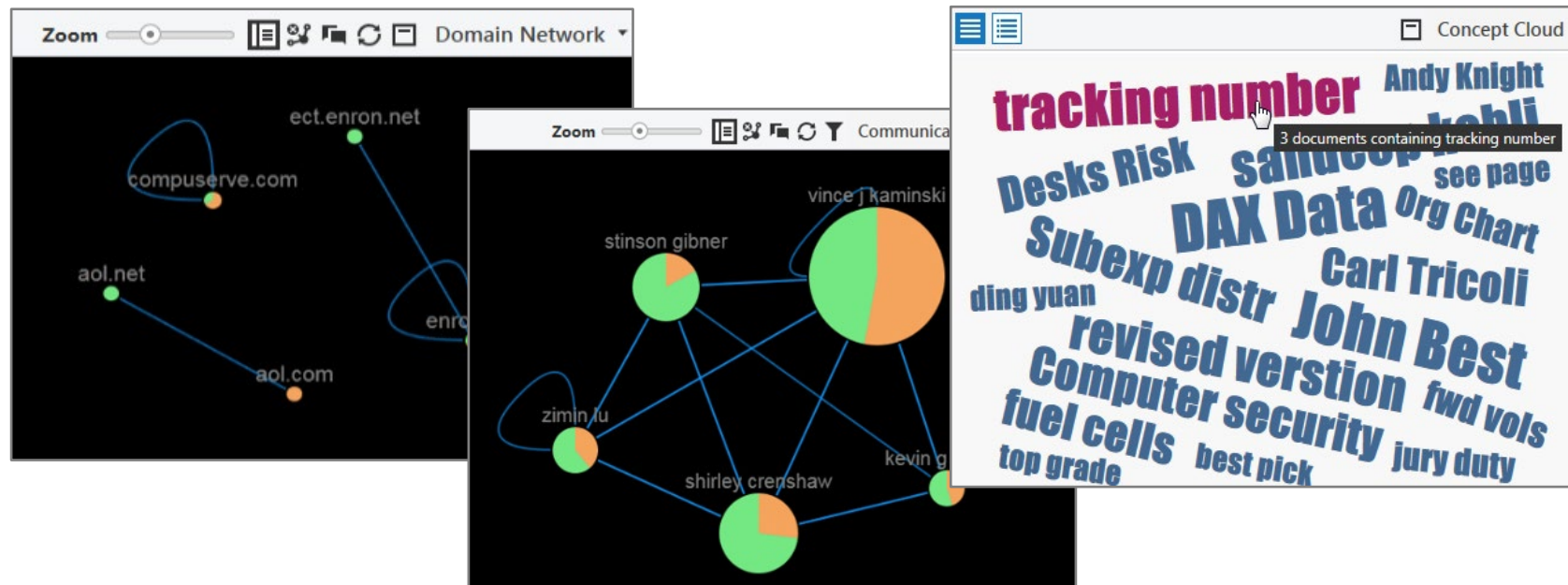
If the memo contains links, you can view the link contents in the same manner as in the **Memo Editor** pane. However, because transcript links are embedded data and do not have an associated URL, they do not open from the downloaded HTML file. They open only from the **Memo Editor** pane.

SOCIAL NETWORK ANALYTICS: OVERVIEW

Use the social network analytics feature to view the communication patterns between people and organizations. This feature is well suited for early case assessments and investigations where you are not sure what you are looking for.

To work with the social network analytics feature, you can add the following panes to your workspace:

- **Domain Network:** Displays email communication between organizations.
- **Communication Network:** Displays email communication between people or identities.
- **Concept Cloud:** Displays the concepts, or topics, that organizations or people are talking about.



The information in the panes stays in sync when you switch from one pane to another.

SOCIAL NETWORK ANALYTICS: SAMPLE WORKFLOW

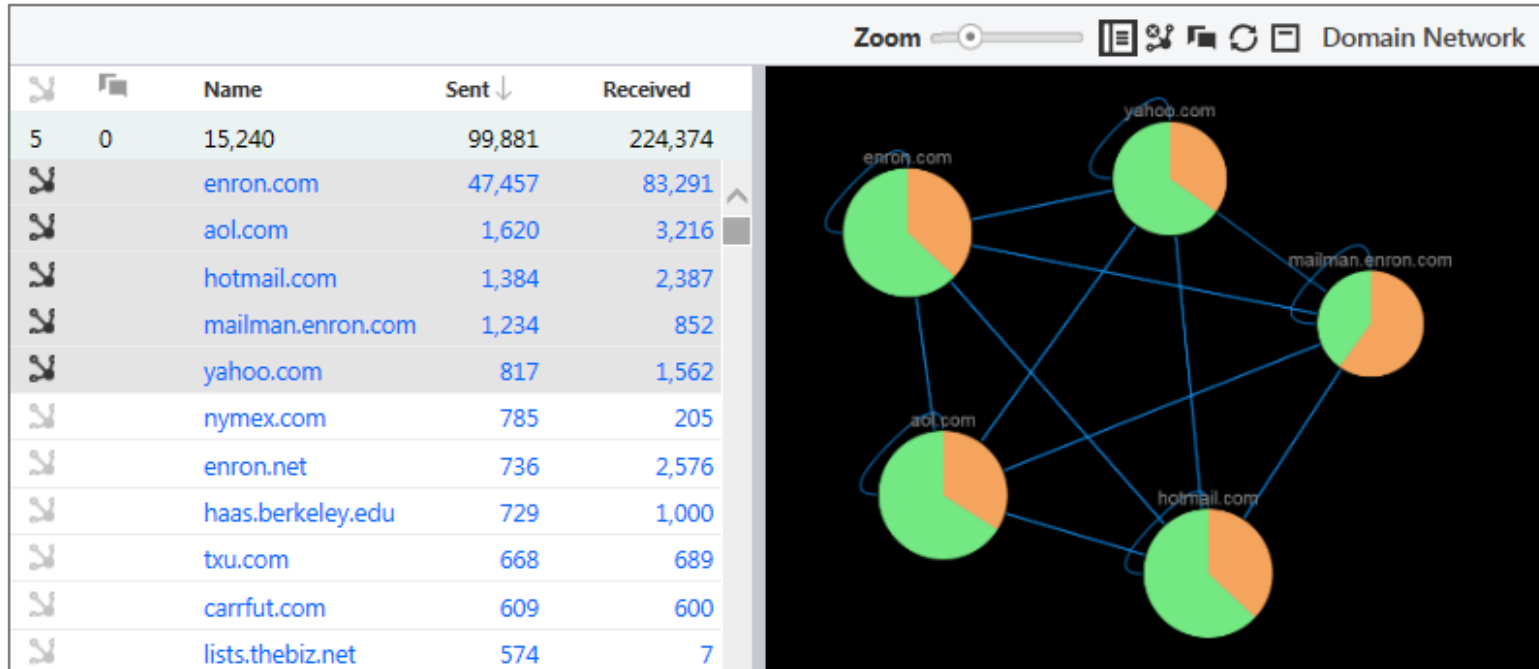
You can work with the social network analytics features with any search results set. A sample workflow might look like this:

1. Configure a workspace with the following panes: **Browse**, **Domain Network**, and **Communication Network**.
2. To explore the emails between organizations, in the **Browse** pane, in the **Organizations** section, select an organization.
3. View the results and visualization in the **Domain Network** pane to see which organizations are communicating with each other.
4. To view details about emails between people, select a line between two organizations in the **Domain Network** pane, and then view the visualization in the **Communication Network** pane.
5. Finally, add the **Concept Cloud** pane to your workspace to get an overview of which concepts, or topics, people are talking about.

Note: To view documents, add a **List** or **Map** pane, and a **View** pane, to your workspace.

DOMAIN NETWORK PANE

In the Domain Network pane, you can view email communication between organizations.



COMMUNICATION NETWORK PANE

In the **Communication Network** pane, in addition to viewing communications for non-normalized names, if your administrator has implemented the **People Identity** feature in your case, you can also view information based on the normalized identity names.

To view the communications for an identity, select **Identity** from the list on the toolbar. To view the communications for a person, select **Person**.

The screenshot shows the 'Communication Network' pane. On the left, there is a table with columns for 'Identity', 'Sent', and 'Received'. A dropdown menu is open over the 'Identity' column, showing 'Identity' and 'Person' options. The table lists several identities with their respective sent and received counts. On the right, a network diagram shows nodes representing identities connected by lines. The nodes include 'Astin Ronald T. RAstin@velaw.com@ENRON', 'Kenneth M. Raisler', ''schwartz', 'charles'', 'mary hain', and 'Marilou Schopper MSCHOPPER@houston.org@ENRON'. The diagram shows connections between these nodes, with 'mary hain' having a self-loop.

Identity	Sent ↓	Received
Person	37	741
Kenneth M. Raisler	13	0
Marilou Schopper M...	7	0
'schwartz', 'charles'	4	32
mary hain	4	3
Astin Ronald T. RAsti...	2	0
Gene Vaughan EHVa...	2	0
chris h foster	1	0
James V Derrick Jr.	1	2
Jamie Ramierez	1	0
jeff dasovich	1	4
jeffshaw00	1	2

Note: The Names Normalization feature, which is available on the **Case Setup > People Identity** page, allows administrators (and group leaders with permissions) to link various people names (email addresses and names) for an individual person to an **identity**.

SOCIAL NETWORK ANALYTICS: CONCEPT CLOUD

In the **Concept Cloud** pane, you can see the topics that organizations or people are communicating about. The **Concept Cloud** pane displays the most important concepts for your search results. The larger the word, the more important the concept is.

To select the documents within your search results set that include a specific concept, click a concept name.

The screenshot shows the 'Concept Cloud' pane on the left and a document list on the right. The word cloud contains terms like 'tracking number', 'Desks Risk', 'DAX Data', 'Subexp distr', 'revised version', 'Computer security', 'fuel cells', 'top grade', 'John Best', 'Carl Tricoli', 'Org Chart', 'see page', 'best pick', 'jury duty', 'fwd voles', 'ding yuan', 'sandco', 'Andy Knight', and 'Kobli'. A tooltip over 'tracking number' indicates '3 documents containing tracking number'. The document list on the right has columns for 'Document Title' and 'Document ID'. It lists several documents, with the first two having a blue checkmark and the number '2' in a box, indicating they contain the selected concept.

To see the concepts that specific documents contain, select the check box next to those documents. Then, click the **Concept cloud for working list** button on the toolbar.

The screenshot shows the 'Concept Cloud' pane on the left and a document list on the right. The word cloud contains terms like 'risk books', 'Hansford County Library', 'Stinson Gibner/HOU/ECT', 'Sherry Benton', 'Stinson Gibner', 'Thrift Shop', 'Day Enron', 'county city', 'short note', 'community donations', 'combination city', 'Texas Cindy', 'New York', 'Richard Fedrick', 'Amarillo newspaper', 'FREE offer', and 'Concept cloud for working list'. A tooltip over the 'Concept cloud for working list' button is visible. The document list on the right has columns for 'Document Title' and 'Document ID'. The document with ID 'RTAdmin_000081853' is selected, indicated by a blue checkmark and a blue highlight. The document with ID 'RTAdmin_000051069' also has a blue checkmark.



SOCIAL NETWORK ANALYTICS: USER INTERFACE ELEMENTS (1 OF 3)

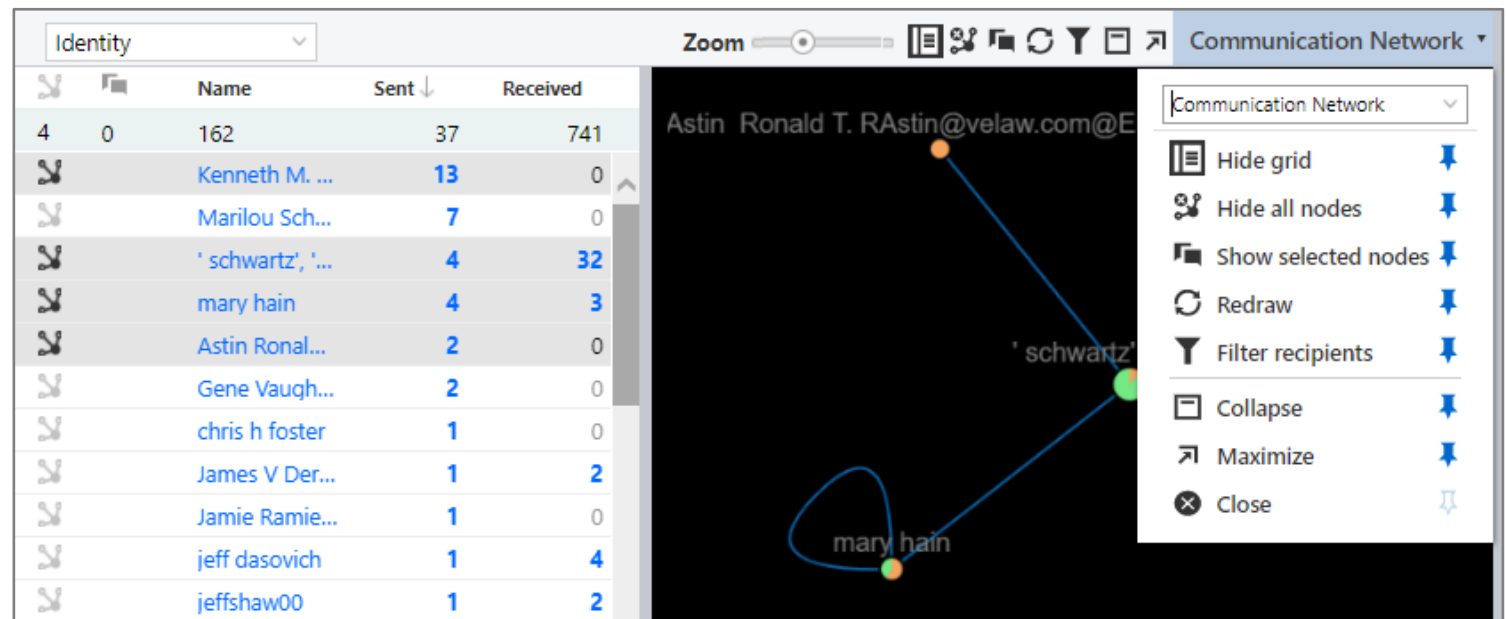
The **Domain Network** and **Communication Network** panes have similar layouts and include the following main components: a toolbar with a menu and options, a grid, and a visualization pane.

The toolbar at the top of the pane includes buttons that you can use to interact with the visualization. For example, you can display only the nodes that contain selected participants.

The **Communication Network** pane also includes a list that allows you to select and display an **Identity** view or a **Person** view in the visualization pane.

The grid includes the following columns and information:

- **Nodes** : The first column displays the number of nodes in the visualization pane. Each node in the visualization pane represents a person or organization. Click the buttons in this column to show or hide nodes in the visualization.
- **Participants** : The second column displays the number of participants in the selected emails, and indicates the people or organizations who are active participants in the emails.
- **Name**: Click a name to select the emails that were sent or received by that person or organization.
- **Sent**: Click a number to select the emails that a person or organization sent.
- **Received**: Click a number to select the emails that a person or organization received.



The screenshot displays the 'Communication Network' pane. On the left is a table with columns for 'Name', 'Sent', and 'Received'. The table shows data for various individuals, including Kenneth M. ... (13 sent, 0 received), Marilou Sch... (7 sent, 0 received), 'schwartz', '...' (4 sent, 32 received), mary hain (4 sent, 3 received), Astin Ronal... (2 sent, 0 received), Gene Vaugh... (2 sent, 0 received), chris h foster (1 sent, 0 received), James V Der... (1 sent, 2 received), Jamie Ramie... (1 sent, 0 received), jeff dasovich (1 sent, 4 received), and jeffshaw00 (1 sent, 2 received). The right side of the pane shows a network visualization with nodes and edges. A toolbar at the top right includes options like 'Hide grid', 'Hide all nodes', 'Show selected nodes', 'Redraw', 'Filter recipients', 'Collapse', 'Maximize', and 'Close'. The 'Communication Network' dropdown menu is open, showing these options.

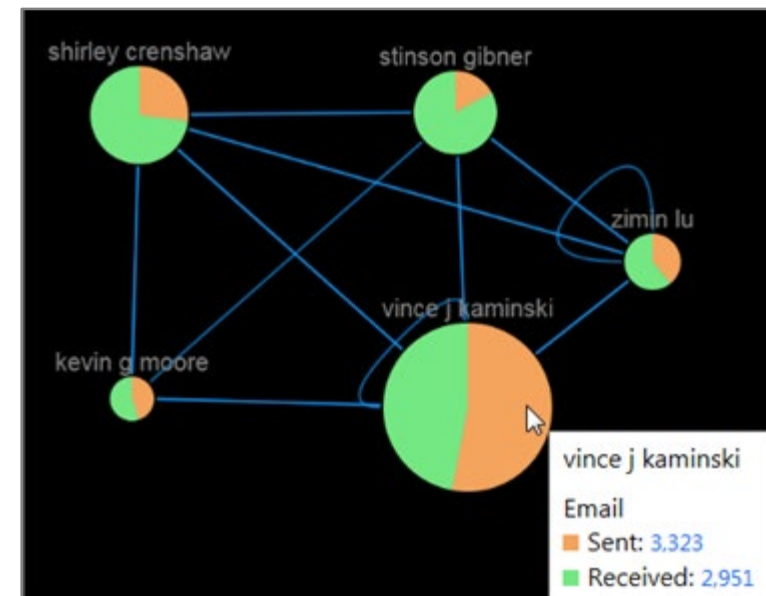
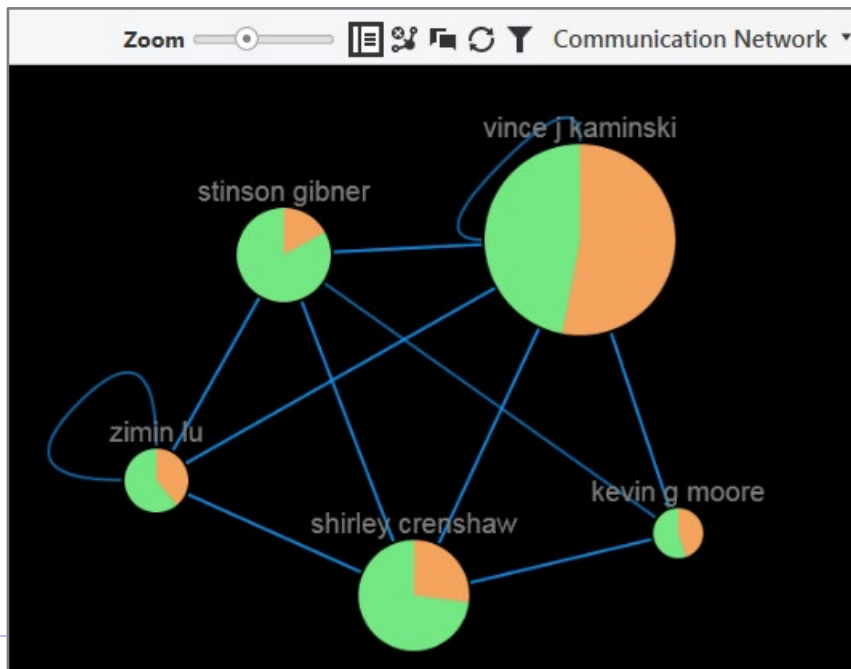
	Name	Sent ↓	Received	
4	0	162	37	741
	Kenneth M. ...	13	0	
	Marilou Sch...	7	0	
	'schwartz', '...	4	32	
	mary hain	4	3	
	Astin Ronal...	2	0	
	Gene Vaugh...	2	0	
	chris h foster	1	0	
	James V Der...	1	2	
	Jamie Ramie...	1	0	
	jeff dasovich	1	4	
	jeffshaw00	1	2	

SOCIAL NETWORK ANALYTICS: USER INTERFACE ELEMENTS (2 OF 3)

The visualization pane provides a graphic representation of the communication between people or organizations. Each node in the visualization pane represents a person or organization. The lines connecting the nodes show who communicated with each other.

Use the slider on the toolbar to zoom in and out of the visualization. To reset the visualization, click the **Redraw** button on the toolbar. You can also use your mouse to adjust the position of the nodes and zoom in and out.

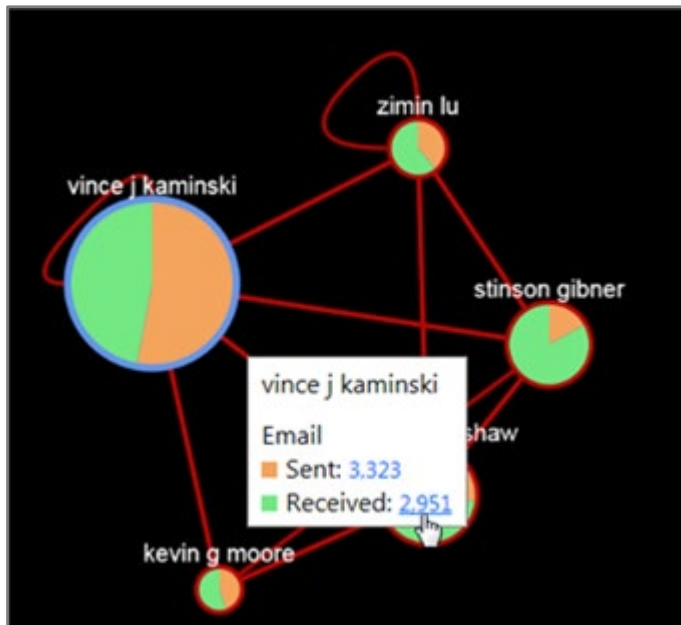
The colors in each node show the proportion of emails that were sent and received. To display the number of emails that a person or organization sent and received, hover over a node.



SOCIAL NETWORK ANALYTICS: USER INTERFACE ELEMENTS (3 OF 3)

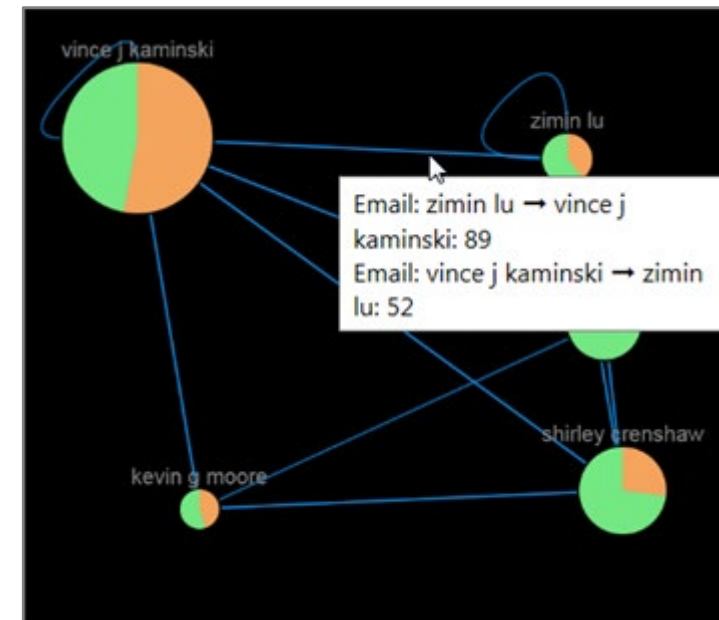
To select the emails that a person or organization sent and received, click a node.

When you select a node, a blue ring appears around the node. Red lines indicate all of the people or organizations who participated in the selected emails.



To view the number of emails and direction of the communication between two people or organizations, hover over a blue connecting line.

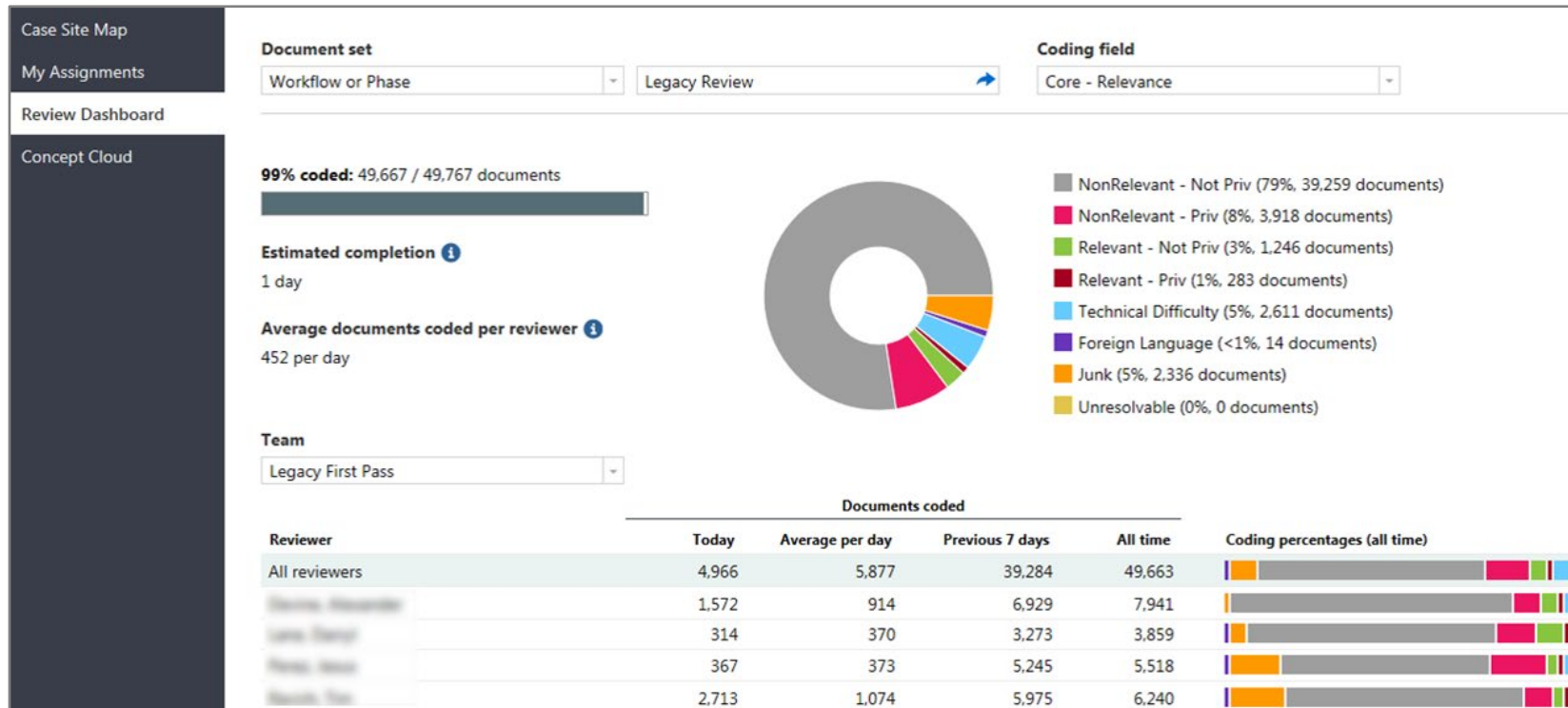
To select the emails between two people or organizations, click the blue line.



REVIEW DASHBOARD

You can view the progress of an active review using the **Review Dashboard**. The **Review Dashboard** includes a progress bar, graph, and reviewer matrix that display the review status of all documents in the case. The information in the Review Dashboard is pre-populated to show all documents in the case. If you select a different document set, coding field, or team, the dashboard updates accordingly.

To access the **Review Dashboard**, on the **Case Home** page, in the navigation pane, click **Review Dashboard**.



REVIEW DASHBOARD: USER INTERFACE ELEMENTS

The **Review Dashboard** includes the following information and options:

- **Document set:** The default option is **All documents in the case**. You can select a type of document set in the list, such as a binder. After you select a type, a second list appears. Depending on the type, select a specific document set from the list, or click the arrow and then select a specific document set. The progress bar, chart, and reviewer matrix update to show information for the newly selected set of documents.
- **Coding field:** This list prepopulates with a quick code field. You can change this field to any quick code field currently available in the case. When you select a different quick code field from the list, the Review Dashboard updates accordingly.
- **Progress bar:** Indicates the percentage of documents that are coded.
- **Estimated completion:** Indicates the estimated number of working days that are required to code the remaining uncoded documents, based on a rolling average review rate over the past seven days, excluding weekends.
- **Average documents coded per reviewer:** Indicates the rolling average of documents that are coded per reviewer per day, excluding weekends.
- **Doughnut chart:** Displays the number of documents and percentages of coded values for the selected coding field.
- **Team list:** Allows you to see the review status for different teams. The default option is **All teams**. When you select a different team, the information in the reviewer matrix updates, but the rest of the information in the Review Dashboard remains unchanged.
Note: The available teams depend on each team's security settings in the **Review Setup** section. Users with permissions to administer teams can choose from any team. Users without permissions to administer teams can choose from the teams that they are members of.
- **Reviewer matrix:** This table, located at the bottom of the page, displays coding metrics for individual reviewers, such as the average number of documents coded per day. A bar chart for each reviewer shows the percentages and number of documents that the reviewer coded for each quick code value. Hover over a bar to see the details. You can sort the columns in the Documents coded area.

Tip: To export information in the reviewer matrix to a spreadsheet (.csv file), click the **Download** button on the toolbar.

REVIEW TEXT MESSAGES

You can review text messages that were created using iMessage, SMS, and WhatsApp. A text message thread displays the names or phone numbers of participants, attachments such as images or videos, and metadata such as the date of the conversation.

In the **View** pane, depending on the view format that you select, images and videos appear along with the accompanying messages. Images, videos, and other attachments are also created as separate documents attached to the text message document.

The screenshot shows a software interface with three main panes. The left pane is a document list with columns for document title and icons. The center pane displays a summary table for a text message document. The right pane shows a detailed view of the text message, including a list of participants and a list of metadata fields.

	NAME	MSG	ATC	INV
PARTICIPANTS	+1412916	18	4	
	Galaxa Ringwood +1862596	10	1	
	+1412897	4	6	
	+1360306	4	2	
	Ray +1724831	4	2	
	Device Owner 1443808	3		
	man +1724650	1	3	
	+1412952		1	
	+1202679			
	+1917579			
	+1412759			

The right pane shows a list of metadata fields:

- Document ID: PO_000000021
- Creation Date: 7/11/2018
- Description:
- Document Date: 11/22/2017
- Document Type: SMS
- Level: 20180711A\Calleb... Sample\00001
- Title: [SMS] +1360306 Ray, +1412952, +1412897, +1412916 [+5 additional participants] (Part 1 of 2)
- [RT] Ingestion Complete: Yes
- [Meta] Chat End Date: 11/25/2017
- [Meta] Chat Start Date: 11/22/2017
- [Meta] Date Top Family: 11/22/2017
- [Meta] Chat End Time: 10:19:46
- [Meta] Chat Start Time: 08:42:21

A summary table displays the participants and the number of messages (MSG) and attachments (ATC) that were sent by each participant. To identify the content that was sent by specific people, in Formatted content view, select a participant's name or action in the summary table.

To add annotations to a text message document, create an image file of the document, and then annotate the image file.

Tip: To search for text message documents, create a search that includes the **Document Type** field with a value of **iMessage, SMS, or WhatsApp**.

The screenshot shows a text message thread. At the top, there is a summary table for participants. Below the table, there are several messages, including an audio message and a video message. The video message is a basketball game, and it has a play button overlay.

	NAME	MSG	ATC	INV
PARTICIPANTS	+144	4	3	
	Ryan Johnson +1724312	4	3	

REVIEW BLOOMBERG CHAT DOCUMENTS (1 OF 2)

You can review chat documents from Instant Bloomberg chats and persistent chat rooms. Chats are also called instant messages.

A chat includes a variety of information. In addition to the messages that participants send to each other, a chat can include the following information:

- Content that participants send to each other, such as messages, attachments, and invitations to ask other people to join the chat.
- Event logs that provide information about participants' actions, such as when a person entered and exited a chat, or whether a person viewed the chat history to learn what happened in a chat room before they entered.
- Noise content that is distracting or irrelevant to the review, such as automatic disclaimers that are posted when people enter a chat.
- Metadata, such as the date and time of the chat, the names of participants, and the number of messages in the conversation. You can search for chat metadata and use it to focus the review. The metadata for a chat document appears in the Code pane.

The screenshot shows a Bloomberg chat document interface. At the top, it displays "Bloomberg Instant [CHAT-000001]" and the time range "2016-11-14 08:42:42 - 2016-11-14 08:44:01". Below this is a summary table with columns for NAME, MSG, ATC, and INV. The table lists participants from "Avengers" and "Stark Enterprises".

	NAME	MSG	ATC	INV
Avengers	Captain America cap@avengers.net	4		
	Bruce Banner bbanner@avengers.net	4		
Stark Enterprises	Tony Stark tony.stark@stark.com	8	1	2

Below the table, the date "Monday, November 14, 2016" is shown. The chat log includes an invitation from Tony Stark to Captain America, followed by a response from Captain America and further messages from Tony Stark.

Tip: To search for chat documents, create a search that includes the **Document Type** field with a value of **Bloomberg Instant** or **Bloomberg Persistent**.

The screenshot shows a search interface. The search query is "Document Type is Blo". The search results are "Bloomberg Instant" and "Bloomberg Persistent". The interface also shows "Page 1 of 1" and navigation controls.

REVIEW BLOOMBERG CHAT DOCUMENTS (2 OF 2)

Depending on your review strategy, you can review chat documents in the **View** pane using the following views:

- **Lite chat (Formatted content view):** Quickly review only the content that participants sent to each other. Lite view displays a subset of chat information: messages, attachments, and invitations. The chat is color-coded based on participants' organizations. To identify content that was sent by specific people or organizations, select a participant's name, organization, or action in the summary table. You can also display or hide keyword highlights.
- **Full chat (Image viewer):** Review all of the information in a chat, including content that participants sent to each other, event logs, and noise content. You can use event logs to determine the full context of a chat. For example, you can identify whether an individual participated in a chat when something important was said, even if they only viewed the content and did not send a response. As another example, you can analyze an individual's view history to determine when they learned about particular information.

Both chat views include a summary table that displays the organization names, participant names, and the number of messages (MSG), attachments (ATC), and invitations (INV) that were sent by each participant.

Tip: People frequently use informal language, abbreviations, and jargon in chats, and typos may be common. Because of this, you should adjust your search and review strategy to make sure that you do not miss any important information. If you use keyword highlights to identify important content, your administrator or review lead should make sure that any search term families include all relevant phrases.

If the chat file includes attachments, the attachments are attached to the chat document in the application.

To add annotations to a chat document, create an image file of the document, and then annotate the image file.

REVIEW TRANSCRIPTS

You can review transcripts on the **Transcripts** page.

To access the **Transcripts** page, on the **Case Home** menu, click **Transcripts**.

All users can perform the following tasks:

- Search and filter transcripts based on content, annotations, or transcript type.
- Annotate transcripts with highlights (transcript issues) and notes.
- Link transcripts to other objects in a case, such as related transcripts.
- Create a report of the annotations in one or more transcripts.
- Export transcripts to Microsoft Word.

Group leaders can perform the following tasks:

- Upload transcripts to a case.
- Download transcripts as portable case format (PCF) files, to share with users outside of the application.
- Administer transcripts.

The screenshot displays the 'All Transcripts' interface. On the left, a table lists transcripts with columns for Type, Name, All Annotations, and Links. The transcript 'Lay, Kenneth - US Court Southern District of Texas - 05-18-2006' is highlighted. Below the table, a 'Pages' section shows a list of pages from 1 to 9. On the right, a detailed view of the transcript is shown, with a search bar and a list of annotations. The annotations include questions and answers, such as 'Q Okay. And who prepared the credit approval report?' and 'A I did.' A yellow highlight is visible on line 17: 'Q Okay. And this one is dated August 10, 1993. Is this'. The interface also shows a 'Timeline' tab and a footer with 'ABC Transcription Company, Inc. 800-555-0123'.

NEED MORE HELP?

To access the online help, click the Help button on the navigation bar on any page.



- The online help includes topics for end users, administrators, and developers.
- No login is required.
- You can print any topic.

DISCLAIMERS

Nuix (and any other Nuix trademarks used) are trademarks of Nuix Ltd. and/or its subsidiaries, as applicable. All other brand and product names are trademarks of their respective holders. Any use of Nuix trademarks requires prior written approval from the Nuix Legal Department. The Nuix Legal Department can be reached by e-mail at Legal@nuix.com.

THIS MATERIAL IS COMPRISED OF INTELLECTUAL PROPERTY OWNED BY NUIX LTD. AND ITS SUBSIDIARIES (“NUIX”), INCLUDING COPYRIGHTABLE SUBJECT MATTER THAT HAS BEEN NOTICED AS SUCH AND/OR REGISTERED WITH THE UNITED STATES COPYRIGHT OFFICE. ANY REPRODUCTION, DISTRIBUTION, TRANSMISSION, ADAPTATION, PUBLIC DISPLAY OR PUBLIC PERFORMANCE OF THE INTELLECTUAL PROPERTY (OTHER THAN FOR PREAPPROVED INTERNAL PURPOSES) REQUIRES PRIOR WRITTEN APPROVAL FROM NUIX.

