opentext™ + Catalyst

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Insight Review User Guide

opentext™ + Catalyst

Insight User Guide

Welcome to Insight

Insight is OpenText's revolutionary e-discovery platform, engineered for the demanding requirements of modern litigation. This guide provides you with information on a wide range of features. Within your site, the features available to you depend on your system permissions.

Getting Started

To log in to OpenText Insight, use the link provided by your administrator or go to the legacy OpenText website: www.catalystsecure.com. In the top of the page, click **Login** and then **Login to Insight**.

You will be prompted for your **Username** and **Password**.

Browser Information

Access to OpenText Insight requires a Web browser; currently, we officially support the latest version of Google Chrome and Mozilla Firefox on a PC or Mac computer. Using any other browser or device (tablet, iPad, phone, etc.) may result in unexpected behavior and/or system errors.

Insight can host documents in virtually any file format. For most files in their native format, we create an HTML representation for quick preview of the content. You can also download a native record if you have the appropriate software on your computer to open the file (Word, Excel, etc.).

Clearing the Cache

We encourage you to clear your cache/browsing history after new releases to the Insight application.

In Chrome, click the **Chrome Settings** button in the top right of the page. Point to **History and recent tabs**. Click **History** and select **Clear browsing data**. Chrome allows you to chose the activity you want to clear and the date range.

In Firefox, click **History** in the **Navigation** bar and then **Clear Recent History**. You can set the date range and activity details you wish to clear.

Working in Multiple Sites

If you need to work in more than one site in Insight, you can do this using the Incognito Window feature. Click the **New incognito window i**n the **Chrome Settings** menu. You can also use the keyboard shortcut CTRL+SHIFT+N.

If you use Firefox, click **File** and select **New Private Window**.

Viewing PDFs

The Chrome browser provides a built-in reader for viewing PDF (Adobe Portable Document Format) records from within the browser. Chrome does not support the Adobe Acrobat Plugin. The Firefox browser uses your default PDF viewer, such as Adobe Reader.

Insight Settings

The **Settings** button gives you access to your user settings. In this screen, you can change the language of the user interface and change your password.

Interface Language

Click the **Change Language** button and select the appropriate option. Clicking **Choose Language** changes the words on the interface into the selected language.

Password

Password parameters are specific to your site. You may be asked to change it at login and receive notifications if it is set to expire. You can also use the **Settings** button. Click **Change Password** and enter the original password and the new one. The system will prompt you if your input does not meeting parameters set by your administrator.

Help and Support

Technical support is available 24 hours a day, seven days a week. You can call us at 303-824-0911 or email us at support@catalystsecure.com.

Our business hours are from 6:00 a.m. MT until 10:00 p.m. MT Monday through Friday and 8:00 a.m. until 5 p.m. Saturday and Sunday. If you call outside these hours, our call-back provider will answer your call and route your issue to the appropriate on-call technician.

To access the **Help** menu, click the **Support** button located in the upper right corner of each page.

Open the Online User Guide or access printable PDFs and quick guides at **Online Guide**.

Live Chat

Click **Live Chat** to start a conversation with the OpenText Resolution Center. Enter your support needs into the **Chat** box and a technician will respond. If your request is during non-business hours, submit the request and it will be routed to someone on staff. See our Support Policy for more information.

Support Tickets

Support tickets are questions or work requests clients submit electronically. These requests are routed to the appropriate person or department through our support ticketing system. Once submitted, clients with the appropriate permissions can view their tickets, add comments or additional information to their ticket, and monitor progress.

Select **Support Tickets** to open the ticketing system. Use the buttons at the top of the page to filter existing requests, by open or closed, for example. To view tickets that require additional information from the client, click the **Waiting for Client** button.

To view the details of a ticket, click it to open it. From the open ticket, you can add comments, upload files, and copy others on your activity, as appropriate. To create a new ticket, click the **Create New Request** button, complete the appropriate fields, and click **Submit Request**. Speak to your Project Consultant for more information on using the ticketing system.

Knowledge Center

Access the OpenText Support Site by clicking **Knowledge Center**. This site provides users and administrators with helpful information about Catalyst's products, services and policies. You will find training videos, manuals, and other useful information, such as FAQs and notifications of product releases.

Translation Assistant

If you'd like to translate foreign words and phrases, you can access the Google Translation Assistant by clicking the **Translation Assistant** link in the menu.

Privacy Policy

Access the OpenText Privacy Policy by clicking the link at this menu or at the bottom of our main website and Support Site.

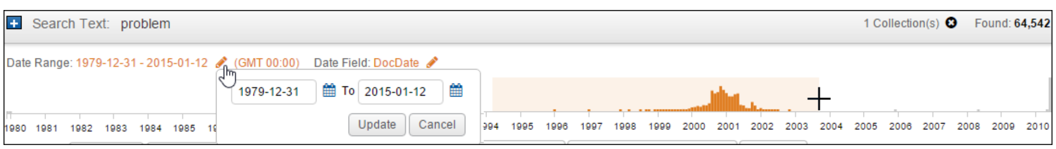
Results

When you run a search or open a folder, your documents are returned in the **Results** page. Insight offers several ways to access your documents and view information about those documents. Your search, any criteria used to find your documents and the number of documents returned are displayed in the **Search Text** area.

At the **Results** page, the **Table** view is the default view and displays your documents in pages of rows. Use the navigation buttons above the rows to navigate among the pages.

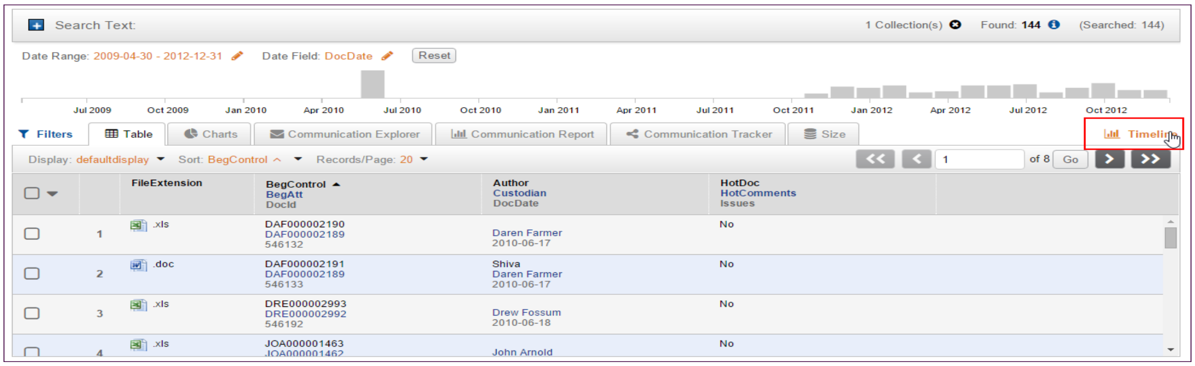
Timeline

The **Timeline**, an interactive date filter used to narrow your documents by dates ranges, is available in all **Results** page views.



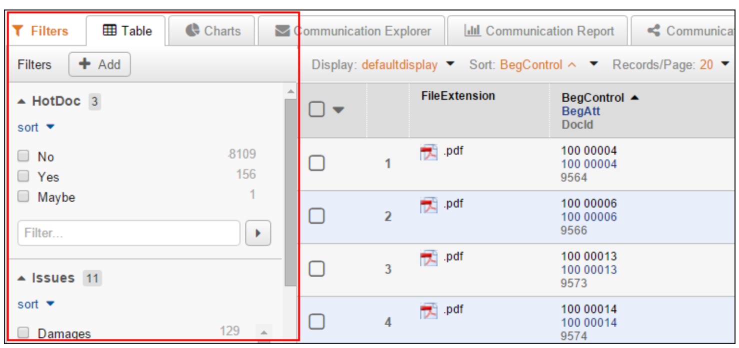
To revise the date range of the document set, click in the graph and highlight the desired date area, or select the dates using the calendars by clicking the Date (pencil) button. The documents available are dynamically narrowed by the date range you've selected, and you can continue to change the ranges using the filter.

You can also change the date fields on which the **Timeline** filter is set. By default, the filter is built on the **DocDate** field, but you change it to display other time stamp fields, such as the **UploadDate** or **ParentDocDate** fields. Click the Date Fields (pencil) button to make your selection. To return to the original document set, click the **Reset** button. This button is only available if you make changes to the Timeline filter. To close the filter, click the **Timeline** button.



Results Page Filters and Tabs Menu

In the **Results** page, use the **Filters** section to refine your document set. Click the **Filters** button and click **Add** to place a field in the display. Then, click a value or select the checkbox to filter by those fields and values. Expand the **sort** menu to display the values alphabetically or by hits or by the values included and excluded.



Select **Clear all** to remove all selections regardless of which field the value is associated. Select **clear** at the **Field** level to remove all the values you selected for just that field. Clear the checkbox or double-click a specific value to exclude it from the filtered results. Clicking the **Delete** (**X**) button removes the field from the **Filters** section.

When using **Filters**, **OR** connectors are placed between the values from the same field and the **AND** connectors between different fields.

The query created to return documents using **Results** page filtering is not saved in the **Search History**.

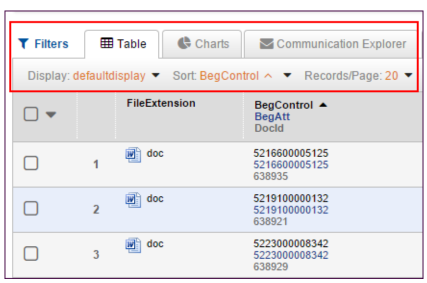
When you no longer need to use the **Filters**, click the **Filters** button to close the display. If any values remain selected, you'll see the total number listed on the button. When you run a new search, the values are cleared automatically.

Results Page Tabs Menu

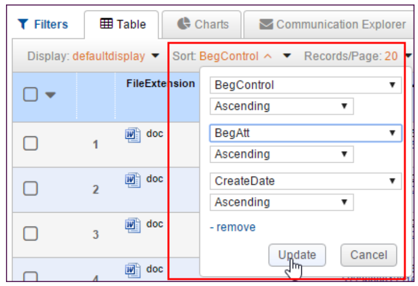
In addition to accessing the **Table** view and **Filters** menu, use the tabs in the **Results** page to view your search results by faceted fields at **Charts** or by graphing the different file sizes at **Size**. And you can examine communications using **Communication Explorer**, **Communication Report** or **Communication Tracker**. Click the **Table** tab to return to your original view of rows of documents.

Results Page Display

Using the menus above your document rows, change to other displays (your administrator has customized one or more ways your documents appear), the fields upon which to sort your documents and the number of documents you'd like to display per page.

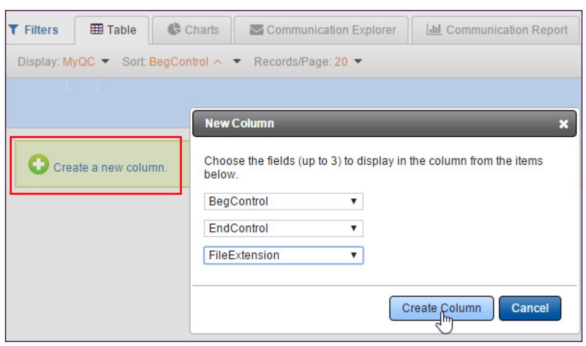


At **Sort**, you can select up to three fields to sort the order of your documents.

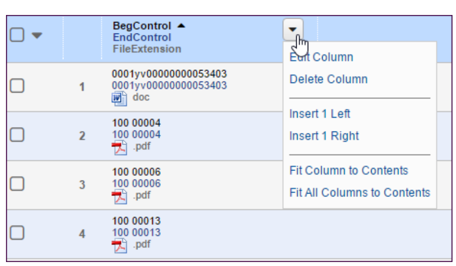


Edit Display

If your Role has the **Edit Display** permission, you can create and edit custom displays for your use only. Expand the **Display** menu and click the create **new link**, enter a name in the **Create Display** dialog box and click the **Create Update** button. Your new display is selected. To start adding columns, click **Create a new column**.



To continue adding columns to your display, click the **Column Menu** button and select **Insert 1 Left** or **Insert 1 Right**. (You can always rearrange columns at any point.)



The **Edit Column** dialog box works like the **Add Column** dialog box. When editing your own display you can remove an entire column using **Delete Column** and also fit the contents to the column width for this column or all your columns. You can rearrange the order of columns already placed in your display by pointing to the header of a column you'd like to move. When the pointer becomes a cross, hold down your mouse button, drag the column to the desired location and release your mouse button.

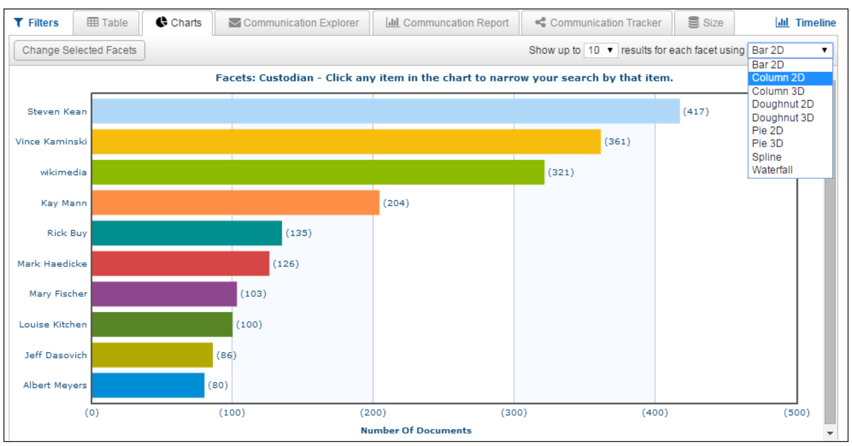
It is typically easier to use the **Save As** link to clone a display and then tailor it to meet your needs. Only administrators can edit default displays, but you can clone either a default or a custom display with the **Edit Display** permission.

Charts

The **Charts** feature provides a view of the number of documents from your search results according to the fields you select. For example, if you run a search for all documents that contain the term *program**, the information available in the chart is based upon the number of documents returned in your search related to the field or fields you select.

Click the **Change Selected Facets** button and use the checkboxes to select your fields. You can also set the number of values you wish to display, and there are several chart types to choose from. In the below chart, 10 values are graphed for the field **Custodian**.

Click a value within the chart to bring back those documents.



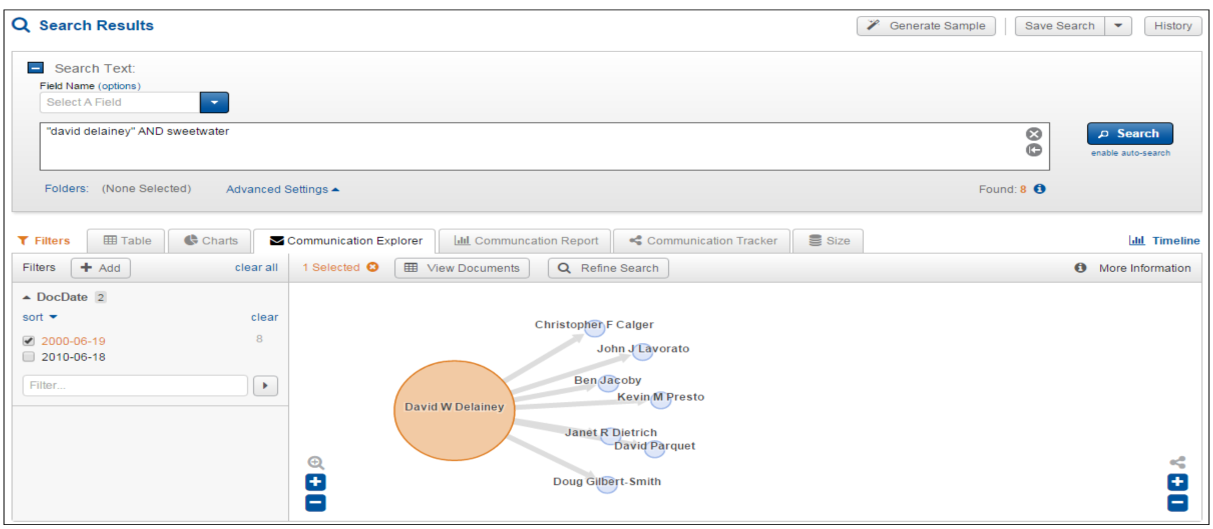
You can change the number of file types displayed or the type of chart you want to display using the menus.

Right-click in the chart to print it. If you've chosen a doughnut- or pie-shaped chart, you can also slice sections or rotate the chart using the **Right-click** menu.

Communication Explorer

Communication Explorer displays a network of communications based on data retrieved from the **From**, **To**, **CC** and **BCC** fields within the documents returned. You can then use this information to filter your results by the values in these fields.

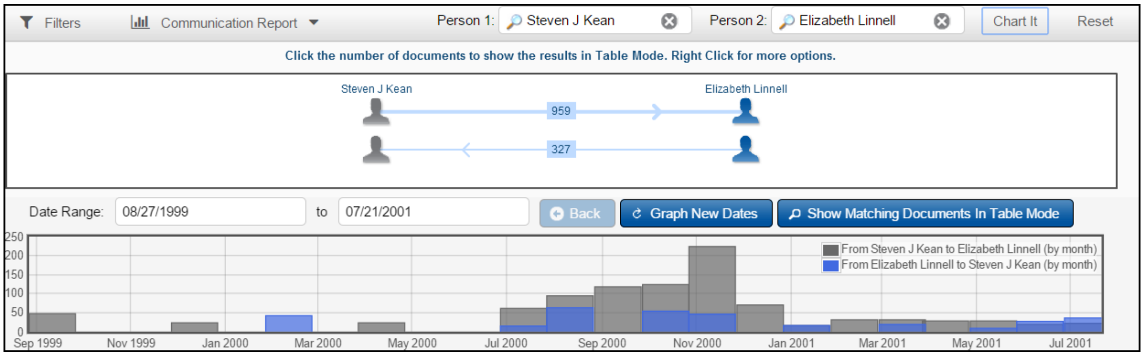
Each circle represents a person who is part of the communications in the email exchange. Click a circle to include the person as part of the filters, or expand the **Top Senders/Top Recipients** menu to select the names to filter the results.



Once you have selected your filters, click **View Documents**.

Communication Report

Click the **Communication Report** tab to find two people whose communications you want to explore. Expand the **Person 1** and **Person 2** menus, and make your selections.



After clicking **Chart It**, the number of documents going in each direction is provided. Click the number to bring back the documents in the **Results** page.

The graph displays a date range of the communications. You can change the date range by dragging your pointer over your chosen date range, and the new dates will graph automatically.

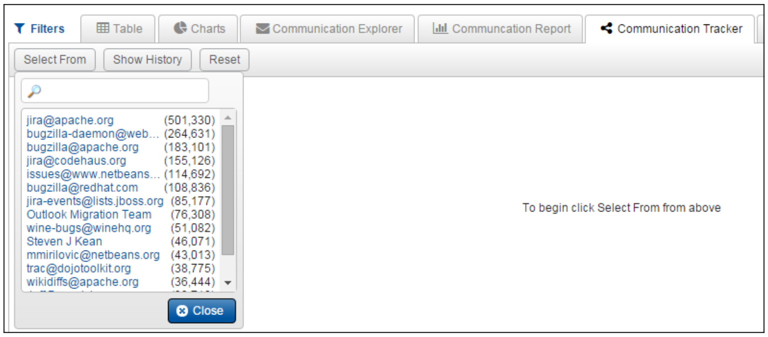
You can display the documents based on the new dates by selecting the **Show Matching Documents in Table Mode** button.

If at any time you want to change either the **Person 1** or **Person 2** values, click the name and select a different one. Then select **Chart It** to see the new results.

Communication Tracker

Communication Tracker allows you to explore documents authored by a particular person. You can see the names or emails of the people with whom the author communicated in a diagram. Then you can quickly jump to a results set of those documents. This visual representation is a good way to explore communications between key people.

Select **Communication Tracker** tab in the **Results** page.



Find the sender at the **From** field. The names appear with a number in parentheses to show you how many documents are authored by that particular person. Select the number of recipients to graph using **Graph up to # People**. The default is **9** but you can select a higher or lower number.

The sender is located in the middle of the graph. The top nine recipients (or the number you selected) are located around the sender. The number in the box connecting the author to each recipient represents the number of communications to that person. Click that number to bring back the records of those communications in the **Results** page.

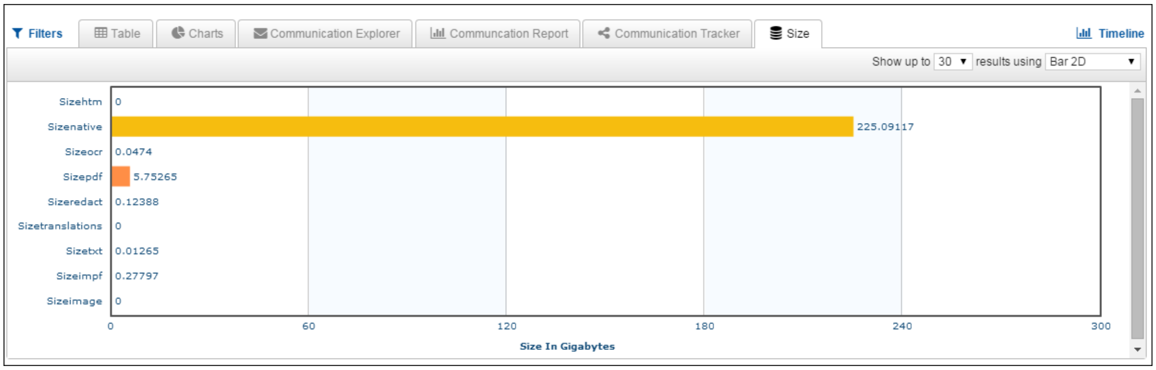
Click a recipient to see the communications from that person. This will put the recipient's name in the center of the diagram and then show the communications that person authored and who received those communications.

Select **Show History** to see the selections you made so that you can easily go back to your original author.

To start over with a completely new sender, start with a new search or clear the search from the search area. To go back to any of the other **Results** options, select that option from the menu.

File Size

To view a graph displaying the sizes of the files of your results, select the **Size** tab.The report is broken down by file types, for example, Text, Embedded, HTM, Native, OCR.



You can change the number of file types displayed or the type of chart you want to display using the menus.

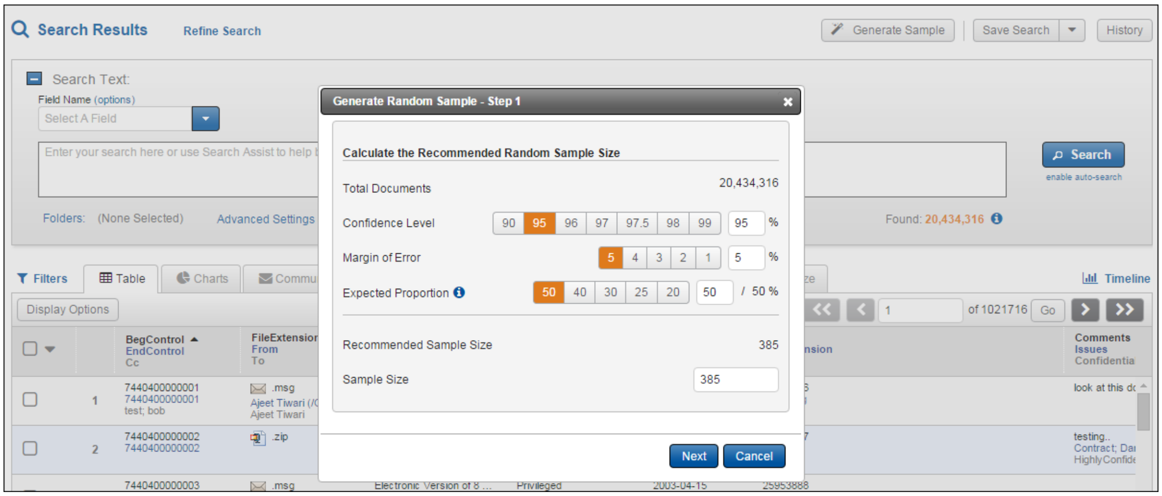
Generate Sample

It's often helpful to take a random sample of documents from a document set and examine them for quality control purposes. With Insight, you can quickly generate a random sample of documents from any search results set.

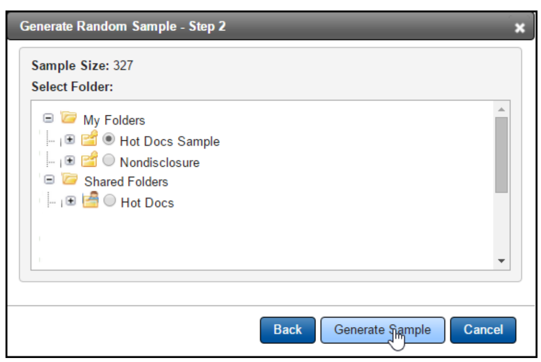
Samples generated in Insight are truly random. Even if you generate two different samples using the same parameters within minutes of each other, the two samples will not contain the same documents.

To generate a random sample from a search results set, complete the following steps:

1. In the **Results** page, click the **Generate Sample** button.
2. In the **Generate Random Sample - Step 1** dialog box, accept the default settings or change options at the top of the page.
3. Default settings determine the recommended sample size. Changing the percentages in the **Confidence Level**, **Margin of Error**, or **Expected Proportion** fields will adjust the number of documents that the system will return in the sample. The **Recommended Sample Size** is recalculated each time you adjust the options.



4. When you are satisfied, click **Next**.
5. In the **Generate Random Sample - Step 2** dialog box, indicate where you want the new sample to be stored. Select an existing folder or create a new folder on the fly.
6. Click the **Generate Sample** button and retrieve the documents from the specified folder.



Monitor sample generation progress through **Monitors & Reports**.

Results Page Search Text

If you've reached the **Results** page by running a search, the **Results** page allows you to view and change the search query without going back to the **Search** page. Your search will be populated in the **Search Text** field on the **Results** page. If you've opened a folder to access your results, the **Search Text** field will be empty, but you can use the **Search Text** field to focus a search within your folder results.

Expand the **Search Text** field using the **Plus** [**+**] button. You can change the search in the **Search** box or use the **Search Assist** to add clauses and edit the search.

Documents, Forms and Fields

Document review takes place within the document interface, also known as the **Detail** page. In the **Results** page, click anywhere in the document row, and the document opens in a new browser window or tab.

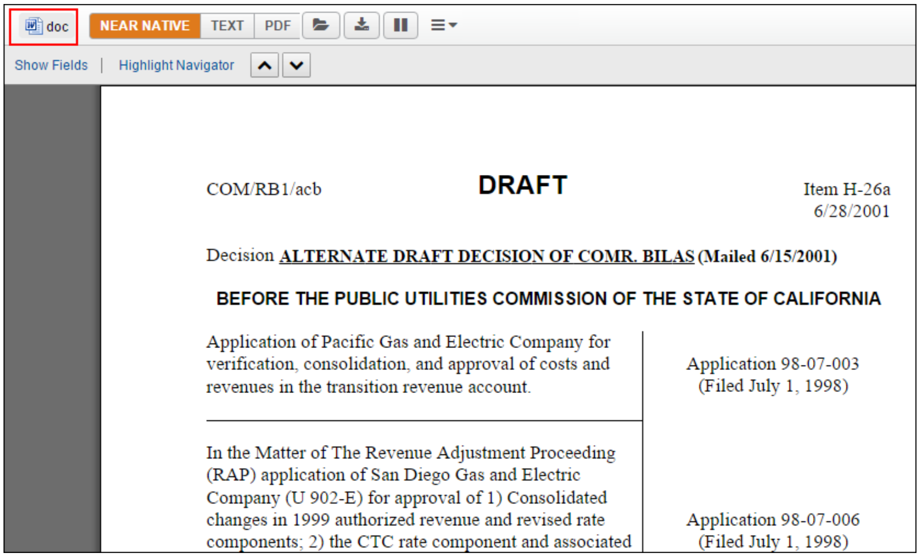
Documents are often uploaded in their native file format, meaning that Word or Excel or other records are uploaded in their original application. Insight provides viewers that quickly and accurately display the record contents without having to open it within the original application.

Viewers are provided for OCR, TIFF and PDF files (non-native files), as well.

Within specific document viewers, including the **HDHTML**, **Text** and **Preview**, you can view the metadata (properties) of a document by clicking the **Show Fields** link. Only populated fields appear. You can also view any highlighting in these viewers.

The body (the content) of the document is displayed in the left frame, and the form, which contains coding fields, is at the right. The buttons above the document take you to the formats available in which you can view the document. There are also permission-based command buttons, such as copying the document to a folder or creating a PDF file of the document.

When viewing a document that was processed and uploaded in its native format, the **File Type** icon is displayed at the top of the record next to the **Viewer** menu.



Near Native Viewer

The contents of most native records are displayed in the Insight High-Definition HTML (**HDHTML**) viewer. This viewer produces formatted text and inline images in a near native representation of the document. The supported formats for this viewer include:

- Word 97-2003
- Word 2007+
- PowerPoint 97-2003
- PowerPoint 2007+
- Visio
- ODF (Text)
- ODF (Sheet)
- ODF (Presentation)
- RTF
- WordPerfect

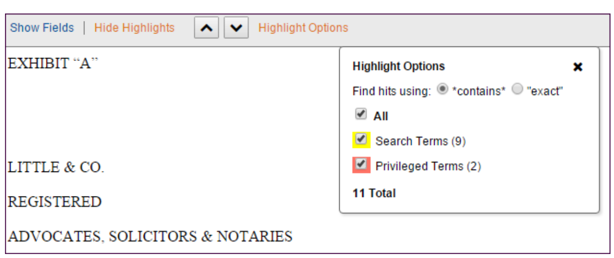
- EML
- MSG
- AutoCAD

Highlights

Insight provides search hit highlighting (**Search Terms**) and static highlighting (**Key Terms**). The terms are highlighted in the document when you are viewing documents in the **HDHTML**, **Preview** or **Text** mode and have turned on the highlights. Terms searched are highlighted in yellow. In addition, your site administrator may designate certain words to be highlighted each time these words appear within the documents on your site.

You can also turn on or off the types of highlights using the checkboxes to make your selections.

Click the **Show Highlights** link to display the **Highlight Options** link. Here you can select to show terms by the **contains** or the **exact** option. For example, if the hit is the word *program*, when the **contains** option is selected, the letters program will be highlighted within the words—program, programs, programmable, etc. Selecting **exact** ensures only the word program is highlighted within the record. Click the **Up** or **Down Arrow** buttons next to the **Highlight Options** link to scroll to the next or previous highlighted term.



As with other Insight features, **Highlights Options** will remain open until you change it.

Highlights are not case sensitive. If you searched for the name *White* limited by case so that documents containing only the lowercase word white are not returned, any documents returned for *White* will have *White* highlighted. If, coincidentally, there are any instances of the lowercase word *white* in the document, it will also be highlighted.

Viewing Excel Spreadsheets

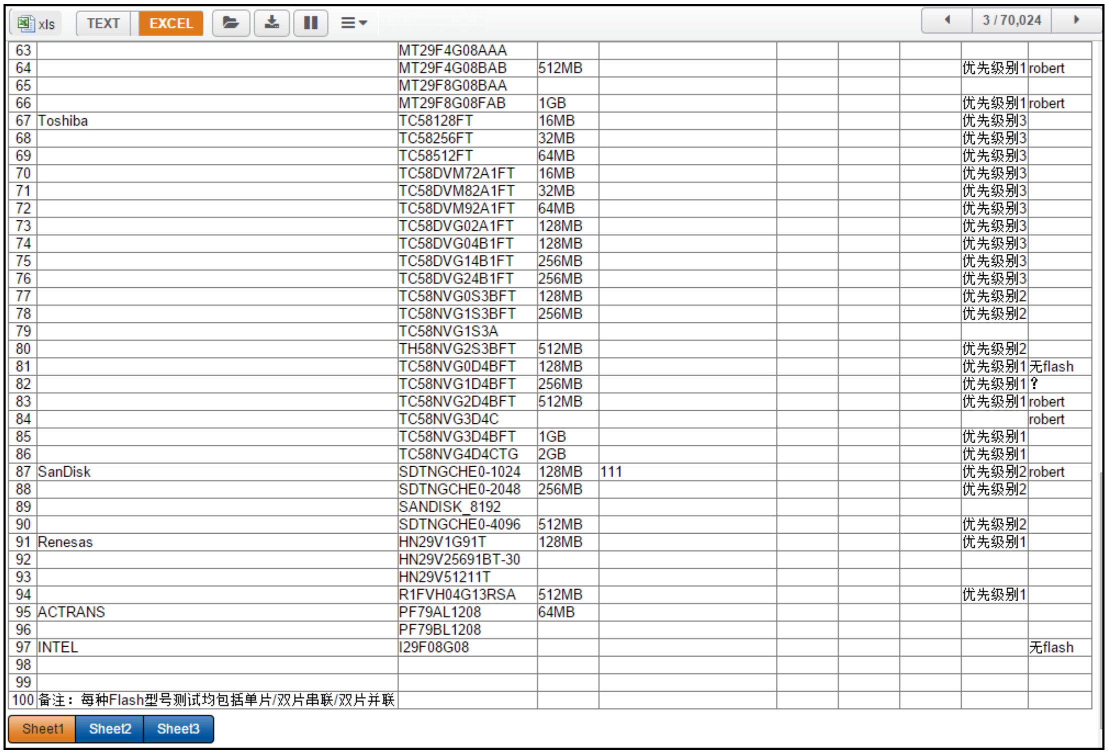
Excel records have an **Excel** button to display the **Excel** view in addition to the **Text** button. (**HTML**) view. If a PDF version of a native record has been created on the fly, the **PDF** button will also be available.

While the Text mode displays the preview of the body content of the file, the **Excel** mode of an Excel file displays hidden rows, columns, embedded charts and access to all the worksheets of an Excel spreadsheet. In order to view any formulas associated with the file, you will want to download and open it in Excel.

Click the **Excel** button to display the spreadsheet in Insight's Excel viewer. This viewer displays 100 rows of data and as many columns as exist per page. To see more rows, use the **Page Control navigation** buttons at the top of the page.

If the spreadsheet has more than one worksheet, you can view each worksheet by clicking the tabs at the bottom (just as you would in the native Excel format). To view the metadata information about the Excel file or any highlights, click the **Text** (on your site it could be named **Preview** or **HTML**) button.

If the spreadsheet has more than one worksheet, you can view each worksheet by clicking the tabs at the bottom (just as you would in the native Excel format).



63		MT29F4G08AAA							
64		MT29F4G08BAB	512MB					优先级别1	robert
65		MT29F8G08BAA							
66		MT29F8G08FAB	1GB					优先级别1	robert
67	Toshiba	TC58128FT	16MB					优先级别3	
68		TC58256FT	32MB					优先级别3	
69		TC58512FT	64MB					优先级别3	
70		TC58DVM72A1FT	16MB					优先级别3	
71		TC58DVM82A1FT	32MB					优先级别3	
72		TC58DVM92A1FT	64MB					优先级别3	
73		TC58DVG02A1FT	128MB					优先级别3	
74		TC58DVG04B1FT	128MB					优先级别3	
75		TC58DVG14B1FT	256MB					优先级别3	
76		TC58DVG24B1FT	256MB					优先级别3	
77		TC58NVG0S3BFT	128MB					优先级别2	
78		TC58NVG1S3BFT	256MB					优先级别2	
79		TC58NVG1S3A							
80		TH58NVG2S3BFT	512MB					优先级别2	
81		TC58NVG0D4BFT	128MB					优先级别1	无flash
82		TC58NVG1D4BFT	256MB					优先级别1	?
83		TC58NVG2D4BFT	512MB					优先级别1	robert
84		TC58NVG3D4C							robert
85		TC58NVG3D4BFT	1GB					优先级别1	
86		TC58NVG4D4CTG	2GB					优先级别1	
87	SanDisk	SDTNGCHE0-1024	128MB	111				优先级别2	robert
88		SDTNGCHE0-2048	256MB					优先级别2	
89		SANDISK_8192							
90		SDTNGCHE0-4096	512MB					优先级别2	
91	Renesas	HN29V1G91T	128MB					优先级别1	
92		HN29V25691BT-30							
93		HN29V51211T							
94		R1FVH04G13RSA	512MB					优先级别1	
95	ACTRANS	PF79AL1208	64MB						
96		PF79BL1208							
97	INTEL	I29F08G08							无flash
98									
99									
100	备注：每种Flash型号测试均包括单片/双片串联/双片并联								

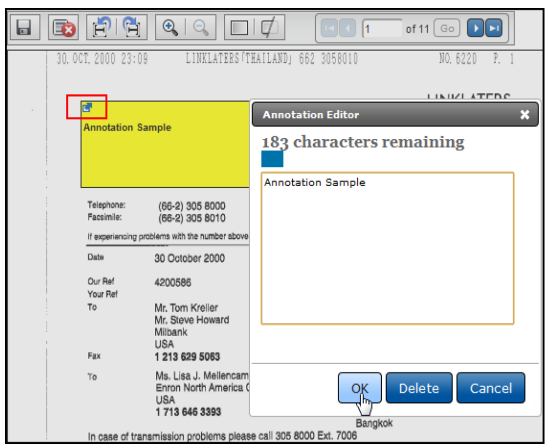
To view the metadata information about the Excel file or any highlights, click the **Text** button. (On your site it may have another name, but it functions the same way. Check with your administrator for further information.)

TIFF Records and Annotations

Insight supports multi-page TIFFs. TIFF records can be viewed in an image viewer (accessible by clicking the **Image** or **Annotation** button). This view displays the scanned contents (image) of the file. Clicking the **Preview** button, displays HTML rendering of the file and the **Show/Hide Fields** link. In the Image view, only one page of the TIFF record is displayed at a time in the document pane. Use the page navigation buttons (located to the right of the **Annotations** menu in the below image) to change pages in the document.

Annotations

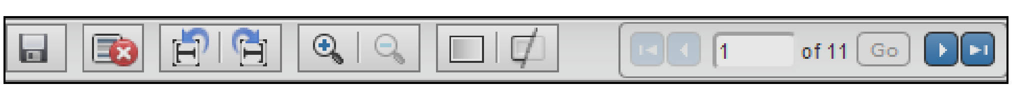
You may have the rights to place annotations on a TIFF image. In the **Annotation** view with the scanned TIFF record visible, place your mouse pointer in the document image. The pointer becomes a **Plus sign**. Click in the image, and holding down your mouse key, drag the pointer over the area you'd like to place your annotation and release the mouse key. This places the annotation box in the record and opens the **Annotation Editor** dialog box. Enter any text you would like to appear in the box (you can also leave this blank), and then click **OK**. Click **Delete** to remove the annotation.



To edit or remove a single annotation, click the **Annotation Editor** button in the top left of the annotation box. This reopens the **Annotation Editor** (see above image), allowing you to delete or add/edit the text.

Annotations Menu

The **Annotations** menu allows you to save or change the entire annotated version.



The system will automatically save a page of annotations when you move to a different page using the page navigation buttons. Once you've added your annotations to the record, you can also use the **Save** (**disk**) button at the far left of the menu to save the annotated version of the record.

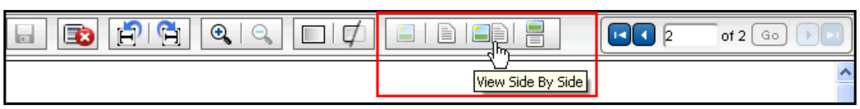
Moving to the right, the **Delete** button removes all the annotations in the page you are currently viewing (it doesn't remove annotations from other pages).

The next buttons allow you to rotate the image and increase or decrease the magnification.

The **Toggle Annotation Opacity** button allows you to switch between viewing opaque annotations that will not show you the underlying information or the transparent view, allowing you to see the annotations but view the underlying information.

Click the **Toggle Annotation Visibility** to view the record without the annotations showing. This doesn't remove the annotations; it makes them invisible. Click the button again to display the annotations.

If the image has been OCR'd, buttons are available to view the image with text in the Document frame. These include viewing just the image or just the text, the image and text side by side or the image and text with the image above the text.



Document Options

The menu of buttons along the top of the document display contains commands for you to complete tasks. Some of these are permission based. The full list of commands includes: **Copy to Folder**, **Convert to PDF**, **Download Original**, and **Pause**.

The **Options** menu also contains commands. These can include **Redact**, **Replace PDF** and **More Like This**. If you've been given permission to translate foreign language documents, the **Translate** link will also be in this menu.

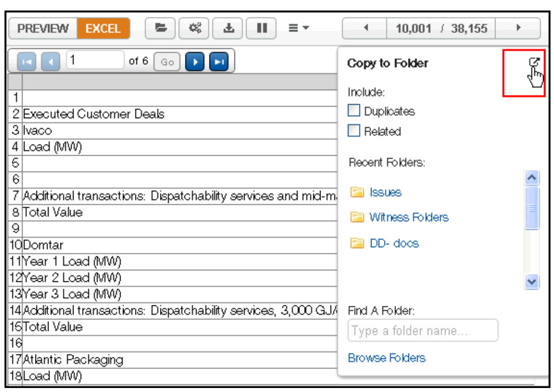
Use the **Pause** button when you need to stop the review timer and lock the document. This is used mostly with the **Review Projects** for reviewer heuristics. Click the button again to resume your review.

Copy a Document to a Folder

To copy a record to a **Static Folder** while within the opened record, click the **Copy to Folder** button. The **Copy to Folder** dialog box has options for selecting to copy any related or duplicate documents to the folder as well. At **Recent Folders**, select your destination folder if it appears in the list. You can also search for the folder. Click the **Browse Folders** link to bring up the top-level **Static Folders** structure. You can expand a folder to find your destination folder, or create a new folder on the fly. Point to the folder and click **New**.

See Copy to Folder for more information.

The **Copy to Folder** dialog box functions as a pod. It can be undocked and placed in another position in the form. It will open in this position across documents until you close the pod.

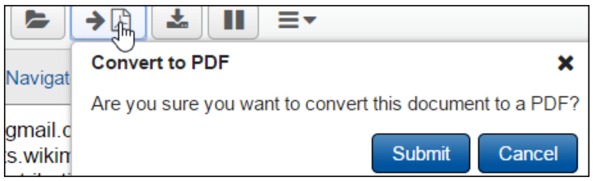


Convert to PDF

You may want to create a PDF version of the record you are in, and Insight allows conversion to PDF on the fly. This is a simple process that works much like converting a Word file to PDF.

If you need to redact a record that doesn't yet have a PDF available, you are required to first convert the record to PDF.

Click the **Convert to PDF** button and then **Submit**.



Once the new format is ready, a **PDF** button is available, and the record can be viewed in the **PDF** format. If you have rights to redact, the **Redact** link becomes available in the **Options** menu once a PDF is created, and the **Convert to PDF** button is no longer available.

Download Original

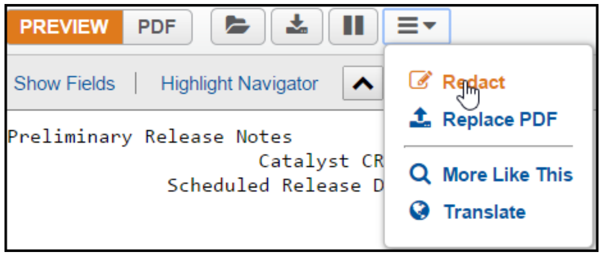
You can download the record for opening in its native application (the file format it was originally saved in) by clicking the **Download Original** button.

You can save the document to your computer, and if you have the native application, view the document in its native format. (For example to view an Excel spreadsheet in its native format, you'd need to have the Excel application loaded to your computer.)

Common native files are typically processed to include comments and track changes, hidden rows and columns. Certain information can only be viewed by opening the record in its native application, such as the formulas used to populate a cell in Excel.

Redaction

Insight provides web-based redaction. When a document has a PDF version, the **Redact** link is available in the **Options** menu if you have permissions to redact. Talk to your administrator if you feel you need redaction permissions.



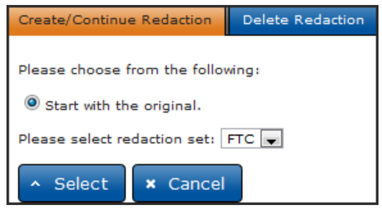
To start the redaction process, open the document you need to redact. If there is not a PDF version of the document, click the **Convert to PDF** button. Once a PDF of the record exists, an image file of the PDF is made at the beginning of the redaction process. You will redact the image version. Once you save the redacted image, the image file is then converted back into a redacted-version PDF. Insight's redaction system does not redact the PDF of the original record, so that when a redacted version is distributed, the redactions cannot be removed.

Click the **Redact** link to open the redaction module.

Redaction Sets

Redaction sets are used to group redacted documents, so that when it is time to produce documents, a particular set of redacted documents is pulled. More than one set is used typically when documents on a site need to be redacted differently for production to different parties. Your administrator will create appropriate redactions sets for your site and inform you about their use.

To create or continue a redacted version, click the **Redact** link in the **Options** menu, and in the **Create/Continue Redaction** dialog box, select whether to start with the original document, or if a document already has a saved redacted version, you can make changes to this version. Additionally, if the Redaction module was closed prior to saving the redaction, you can select to continue with the redaction that is in progress. Next, select the **Redaction Set** to store the document.

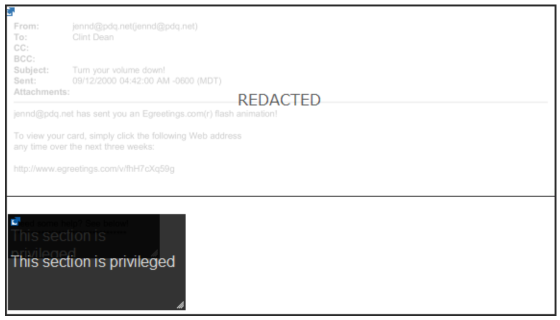


Using Redaction Buttons

Use the controls at the top of the screen to rotate the page, which is useful for scanned images that may be rotated, or to zoom in or out—increase or decrease the size of the document.

The **Redaction Button Controls** are at the top left of the document. These buttons allow you to place the appropriate redaction box within the document image. Your administrator will have set up a number of custom **Redaction Controls** with specific messages (e.g., Privileged, Work Product). Your site may have a **Blank Redaction** button. This button will redact but leave no redaction message, only a box with a border. Additionally, you may have the option of using a button that does not have borders, so that the redacted copy doesn't show areas that have been redacted using this button. (This can be useful when you want to redact an old Bates number that appears on the document.)

Click one of the redaction buttons and then draw a box around the text or image you need to redact by holding down your mouse button and dragging the pointer over the area you need to hide in the document.



You can change the size of the redaction box by dragging the corners or the sides with your pointer.

As you move from one page to the next on a multi-page document, the system will save the changes. You do not have to click the **Save** button or the **Save Draft** button as you move from page to page. Click **Safe Draft** if you want to manually save your work and have only partially completed a page.

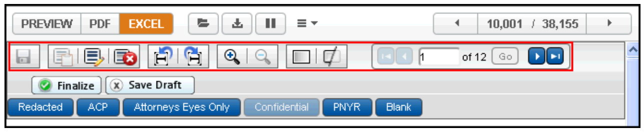
Once you have finished redacting the document, click **Finalize**. This signals the system to convert the redacted version into a secure PDF.

If you do not finalize the redaction by clicking the **Finalize** button, a redacted version will not be pulled, as the system does not considered an un-finalized saved draft a redacted version. The system does, however, notify the production manager of the drafts.

It is best practice to finalize each time you make a redacted version. You can go back and edit a finalized version, but make sure you remember to finalize it again.

Redaction Options

The **Redaction** tool bar at the top of the image gives you some flexibility in how you create your redactions on the document.



Point to each button to see the tool tip explaining the function of each button.

Save/Finalize

After you have input the redaction boxes, you can select the **Save** button (disc) to save your redactions. This is saving a draft and works the same as the **Save Draft** button. The system does not convert your redaction back to PDF unless you click the **Finalize** button. When redacted versions of a record are pulled for printing or production, only finalized documents are considered redacted versions. Always click **Finalize** when you have completed your redactions.

Copy Recently Redacted Page

The **Copy Recently Redacted Page** button will copy redactions and rotations from the most recently redacted page. This is useful if you are redacting duplicate documents one after the other.

Redact the Whole Page

Use this button to redact the entire page with the selected redaction text button.

Remove all Redactions from Page

Remove all redactions from the page by selecting the button with the red **X**.

Rotate and Zoom

Rotate and zoom in and out with the next four buttons on the menu.

Toggle Opacity and Visibility

When documents are redacted, we provide a transparent version so you can view the underlying words or images that have been redacted. Use the toggle buttons to switch between the transparent and opaque views. You can also temporarily remove the redaction visibility completely.

Navigate to Next Page to Redact

Use the page controls for multi-page documents. You do not need to save each page after you redact. The navigation will automatically save the redactions on each page.

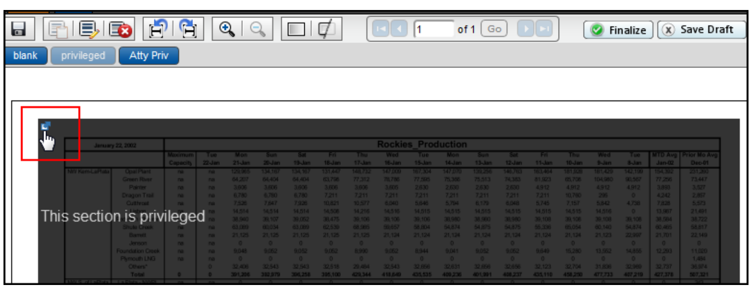
Deleting and Adjusting Single Redaction Boxes

The administrator of your site set up the redaction buttons and entered the text that appears on the redaction box. Redactions vary in size so you may find that adjusting the text within the box to a larger or smaller size is necessary.

In the above image, the text in the left redaction box is too big for the redaction. Click the menu at the top left of your redaction box to resize the text. Just drag the **Font-size** bar to the left to make the font smaller. Drag it right to make it bigger.

Redaction Box Menu

You can delete a redaction box by expanding the menu at the top left of the redaction box and selecting **Delete** from the options.

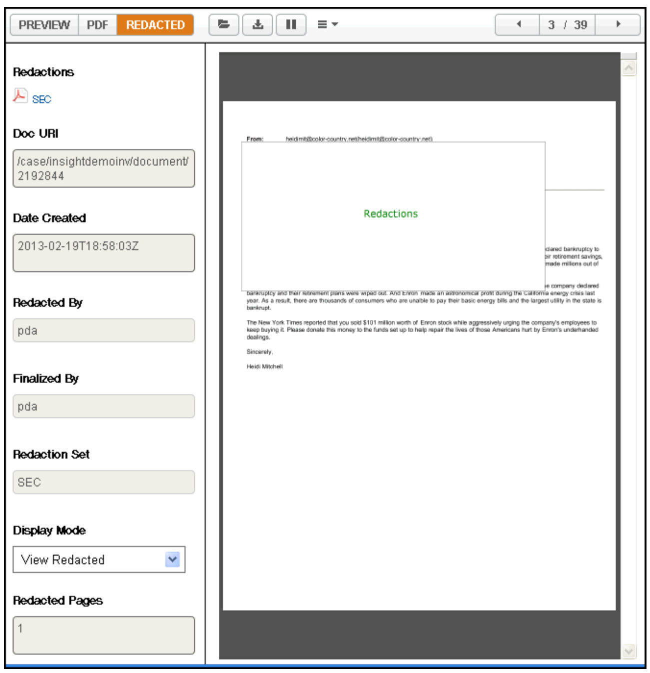


Redaction buttons may be set up so that you are able to edit the text of the redaction, the color of the text, box and border, the alignment of the text, and the font. If these options are available, click the menu at the top left of the redaction box (above image) and make your changes in the **Redaction** dialog box (below image).

Redacted versions of documents that contain colored fonts or images will retain the colors in the redacted version.

Viewing Redaction Versions

Records that have a finalized redacted version will display a **Redacted** button to open the redacted version or versions. (Stored redacted versions are only available to users who have the rights to redact). In the redacted version, the left pane displays information, which includes: **Doc URI, Date Created, Redacted By, Redaction Set, Display Mode**, **Finalized Date** and the **Redacted Pages**.



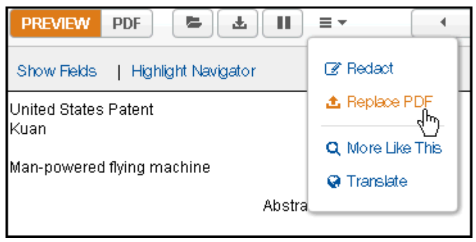
You can view the transparent version of the document by selecting **Transparent** from the **Display Mode** in the right pane of the redacted document. If you want to make changes to the redacted document, expand the **Options** menu and click the **Redact** link.

Upload PDF

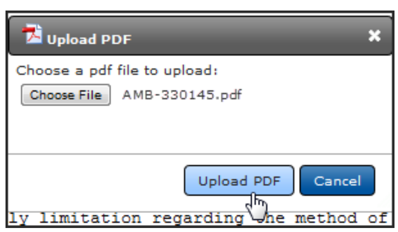
You may have permissions to upload a new PDF version of the record you are in. For example, perhaps the original file is an Excel spreadsheet, and the record was converted to PDF in the Insight system but is not formatted properly. If you have permissions to do so, you can create and upload a new PDF of the original file.

If you need to create a new PDF of the file, select the **Download Original** button. This will download the file in its native format. Save the file to your computer, and make any necessary formatting edits to the file. Print/Convert the file to PDF, and save the PDF version to your computer.

Then, click **Replace PDF** in the **Options** menu.



This takes you to the **Upload PDF** dialog box where you can browse to locate your newly saved PDF by selecting **Choose File**. When the file is populated in the field, select **Upload PDF**.



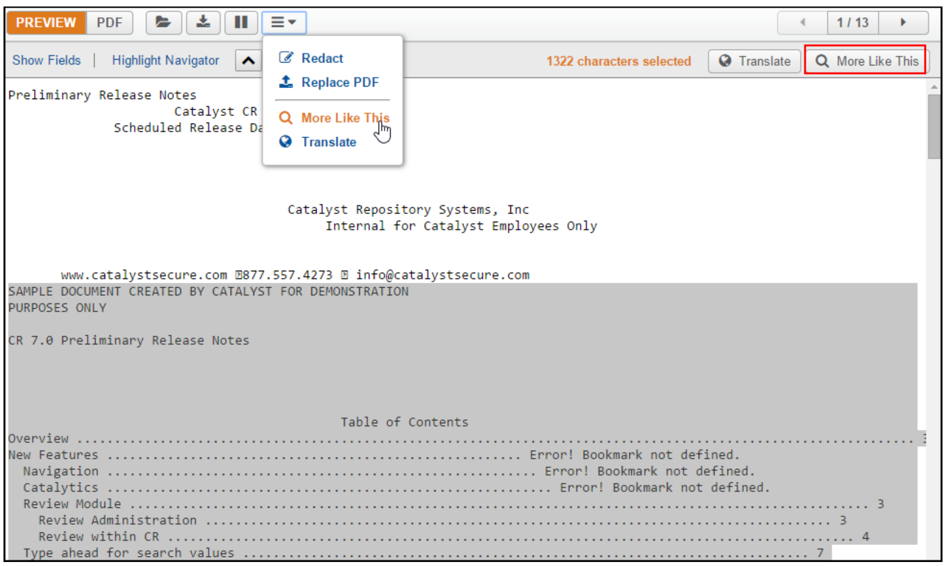
When the upload is complete, you can view the PDF by clicking the **PDF** button.

More Like This

Insight searching includes the **More Like This** functionality, which provides the ability to find documents similar to the document being reviewed. This allows you to quickly isolate documents with similar content and themes.

When reviewing an important document, use your mouse pointer to highlight specific text within the **Preview** panel of the record in the **Results** page or in the **HTML/Preview** view of the opened record. This enables the **More Like This** button in the top right of the frame. The number of characters you have highlighted is displayed (there is a 5,000 character maximum).

You can also expand the **Options** menu and select **More Like This** to include all the text within a record (provided it is under the 5,000 character limit).



Clicking the **More Like This** button places a new query within the **Results** page **Search** box. This is a BodyText query with an OR connector between each value highlighted in the text. The **Found:** document count updates based on this new search query. You can customize this search by removing or adding values or clauses to the search. As with all searching in Insight, you can use **Folders** and **Advanced Settings** to define other search parameters. Retrieve the documents by clicking **Search**.

Translation Assistant

You may have permission to translate sections of document text “on the fly” while working within the record. This is a quick way to understand the overall content of a foreign-language document.

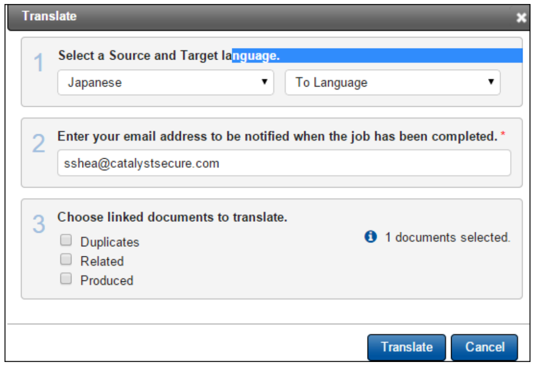
When reviewing documents that contain foreign words or phrases, highlight the text (in the **Preview** view of the opened record). This enables the **Translate** button at the top right. Click it to open the **Translate** dialog box. There is a 5,000 character limit.

Your highlighted text is in the left panel. The translator sets the source language (**From Language**) when possible. Expand the **To Language** menu and select your target language, and then click **Translate**.

Click **Close** to return to your document.

Document Translation

When working in a site with foreign language documents, you may have permission to send a document for machine translation. If you have this permission and need the document you are reviewing translated, expand the **Document Options** menu and select **Translate**. (Documents can also be sent for translation in bulk at the **Actions** menu of the **Results** page.)



Once you've made your selections and clicked **Translate**, the document is submitted to the Asia Online machine translation service. Once the translation is completed, the translated version is linked to the original as a separate record.

The languages available for machine translation are Arabic, Chinese Simplified, French, German, Italian, Japanese, Korean, Polish, Portuguese, Russian, Spanish, and Thai.

Forms

The database field information makes up the document form and is where you apply your coding changes to the document. In an opened record, the form is in the pane to the right of the document text.

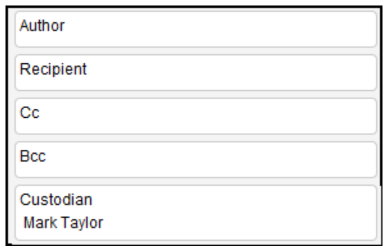
There may be more than one form associated with a document, and you have been given access to the forms appropriate to the work you need to do.

You typically have access to at least one review form, which may display some of the metadata information associated with your file. Metadata information can also be viewed by clicking **Show Fields** in the document pane. All metadata fields populated with data can be viewed at **Show Fields**.

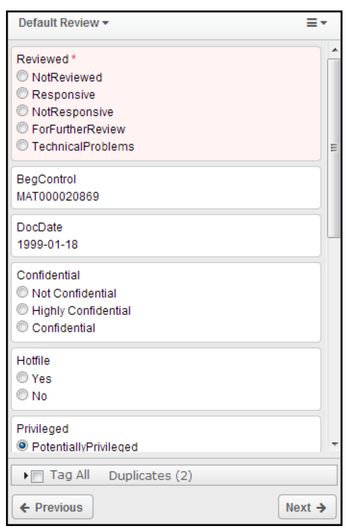
To see the forms available to you, expand the **Forms** menu at the name of the form you are in. To change forms, click the form name.

Fields

You will make coding changes to editable fields located in a specific **Review** form. These forms may also contain some non-editable label fields, which provide you information about the document.

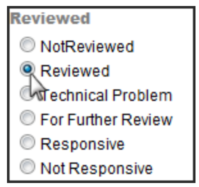


Fields can have properties and rules assigned to them. Fields with a faint red background and an asterisk (*) are required fields. You cannot save the record until you apply values to required fields.

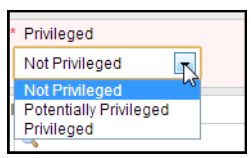


Insight forms may contain several different editable field types. Text fields allow you to add or edit text. These work like standard text boxes and may be limited to short entries or allow longer entries. Type in the box to include information.

Fields may allow you to choose one value from a list of values by selecting an option button (radio button).

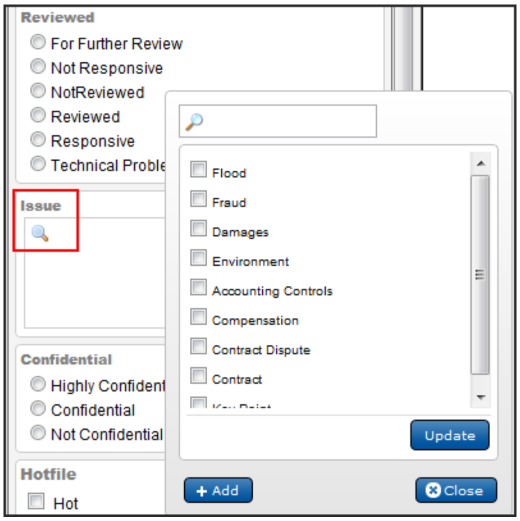


Another field which allows you to choose only one value is the drop-down menu. Expand the menu and highlight your value.



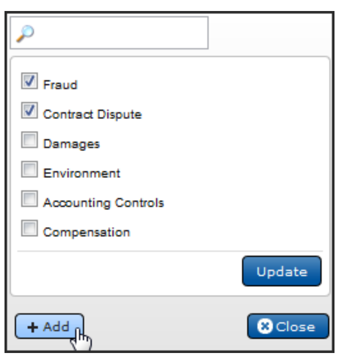
You may also have fields which allow you to select more than one value. Checkbox fields display all the value choices in the form, and you can select one or several.

The multi-value lookup field also allows you to make multiple choices. To populate this field, click the **Search** button (magnifying glass).

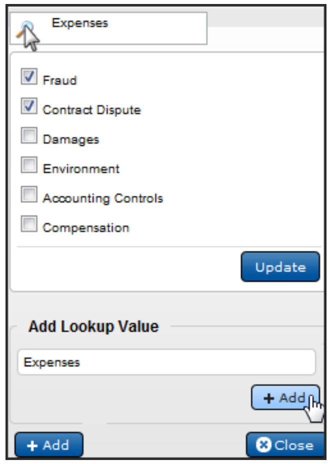


This opens the multi-value table. Find your values and select them using the checkboxes. You can search for a value if this list is large. Type part or all of the word into the **Search** box above the list, and click the **Search** button.

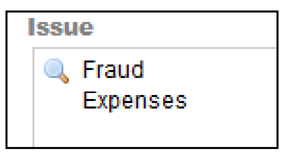
If the value isn't available, you may have the ability to add it. If the **Add** button is available at the bottom of the table, click it.



Type your value into the text box and click the **Add** button right beneath the text box.



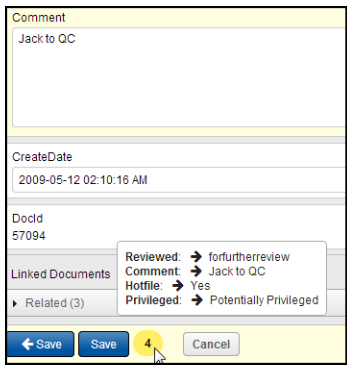
Back in the list, find your new value and select it using the checkbox. You can click **Close** to close the lookup table without adding any values. When you've chosen all the appropriate values you need, click **Update**. Your values will now populate the field.



Some fields, such as **Date** fields, may require you to enter information in a particular format. Insight adheres to the International Standards for Organization (ISO)-developed International date format of YYYY-MM-DD. You may receive an error when you enter fielded information in the wrong format and try to save the document.

The **Delete** (**X**) button is available in a field to clear the field of all input. The button appears when you point to a field.

When you change a field, it is shaded in yellow to reflect that you've made a change during this session.



For a quick look at all your field changes in the form, click the yellow button at the bottom of the form. The number reflects the number of fields you have changed.

Once you save the document, the fields will no longer be shaded in yellow, and the number will not appear at the bottom of the form.

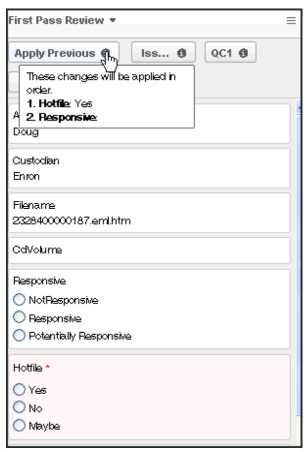
If you have the proper permissions, you can view a complete audit history of the saved changes to the record,. Expand the **Forms Options** menu, and select the **Coding History** link.

Shortcuts and Rules

Your administrator can create buttons and rules on your form, making coding consistent, easier and more efficient. Please speak with your administrator for specifics regarding the shortcut buttons and rules used in your **Review** forms.

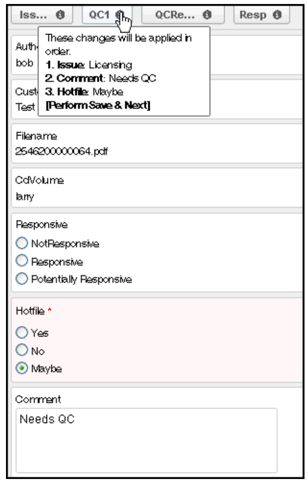
Apply Previous

The **Apply Previous** command is a user-permission that enables you to code a record with the same coding as the last record you saved. This button is not available until you code and save a record after each login. Click the **Information** (**i**) button to see how the last save was coded. Click the button to apply the changes to the current record. When you log out, the **Apply Previous** command ceases to capture. When you log back in, you must code and save a record in order for the button to appear in the form.



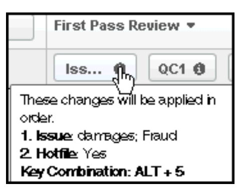
Shortcuts

Your administrator may create **Shortcut** buttons for quick, one-click editing of coding forms. These can be built for forms at any time during the review. Up to 10 **Shortcut** buttons can be placed within a form. Point to the **Information** (**i**) button to see the coding that is applied to the form when a **Shortcut** button is clicked. In the below example, clicking the **QC Shortcut** button will change three fields and save the record and open the next record.



Your administrator can also assign keyboard hot keys to use in addition to the **Shortcut** button. In this example, the **Issues Shortcut** button will change the **Issue** field to **damages** and **Fraud**, and it will change the **Hot file** field to **Yes**, but it will not save the record. Click **Save** or **Save & Next** or use the keyboard hot keys ALT+S to save your changes.

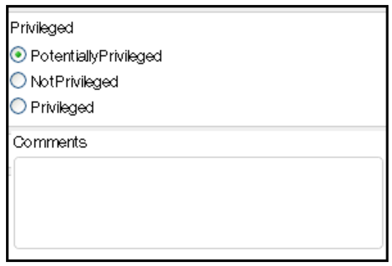
This **Shortcut** button also has a keyboard hot key combination of ALT+5; instead of clicking the **Shortcut** button, the reviewer can choose to hold down the ALT key and the 5 key to code the form according to this **Shortcut** button.



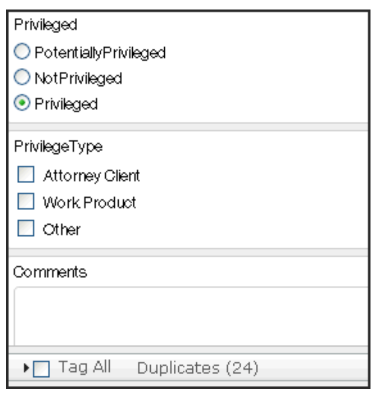
Rules

You may also find that some fields have Rules associated with them. Rules can show or hide a dependent field based upon the selections made in the parent field. Rules can also code a value in a dependent field or clear a dependent field. Rules are set up by your site administrator to suit the needs of your matter.

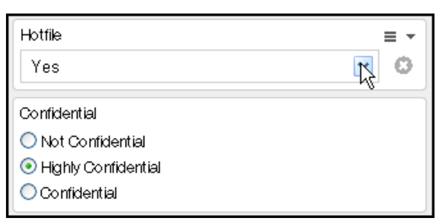
In the below example, this form has a rule built upon the **Privileged** field.



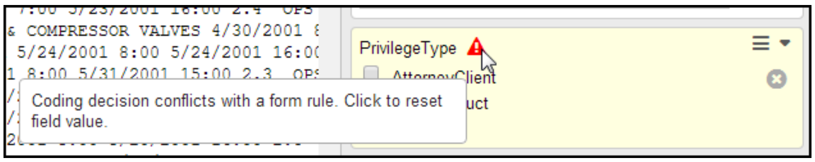
The command displays the **PrivilegeType** field when the **Privileged** value is selected in the **Privileged** field.



Rules can also select values at other fields. In the below example, when **Yes** is selected at **Hotfile**, the **HighlyConfidential** value is automatically coded at **Confidential**.

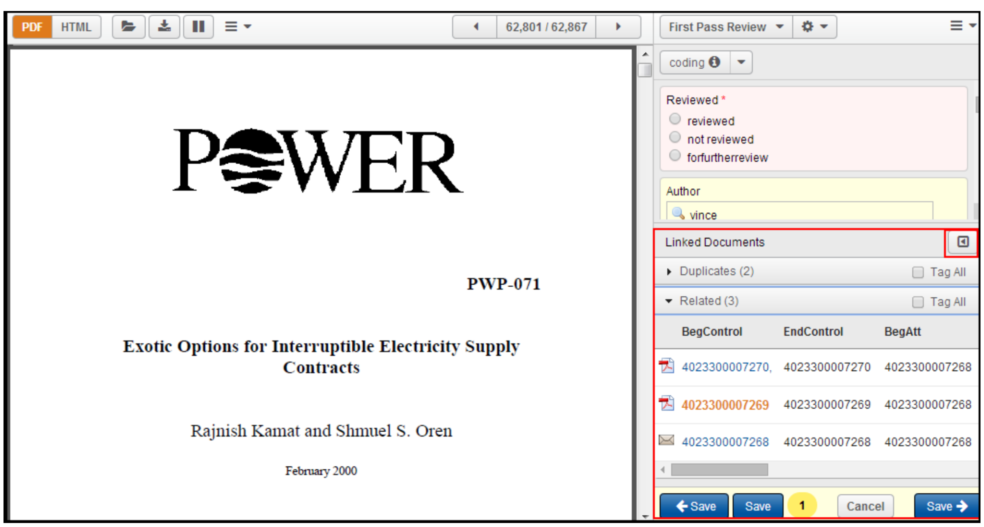


If you code a field in a way that is inconsistent with a Rule set up by the administrator or a Shortcut is inconsistent with a Rule, the Rule will take precedence and be applied to the form as it is saved. You will see a Warning.



Typically, sites may have documents that have other documents linked to them, such as related documents or duplicate documents. You can easily access these documents. These documents are grouped in the lower portion of the form at **Linked Documents**. Your site may have the **Tag All** checkbox available for you to apply the changes you make to all the documents in the relationship.

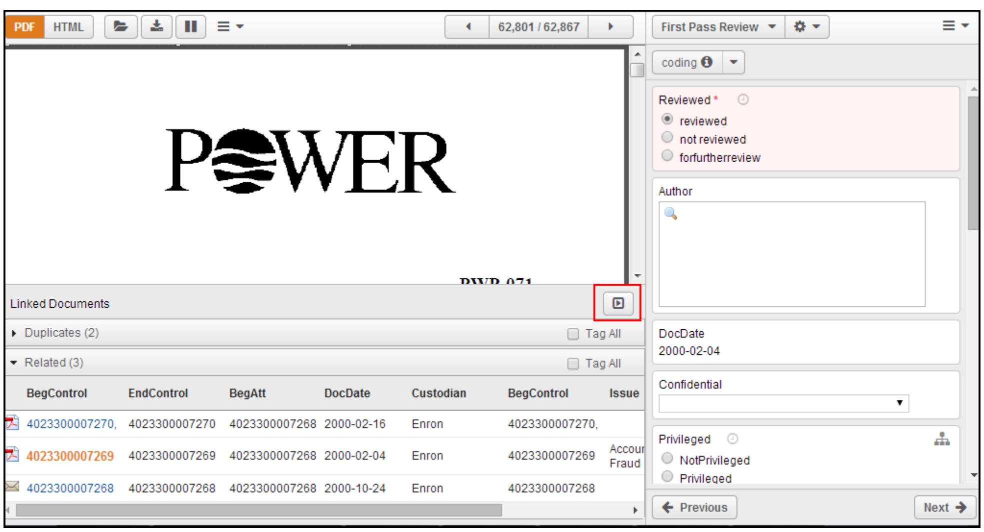
If **Continuous Active Learning** is turned on for your site, the **Tag All** checkbox is disabled.



It is important to note that the changes you make to any fields in the record are the changes applied to those fields in all records in the relationship when you select the **Tag All** checkbox. For example, perhaps you are reviewing a parent document that has an attachment. The attachment was coded by another reviewer in the **Issues** field with **Damages** and **Fraud**. If, in the parent document, you coded the **Issues** field as **Contract Dispute** and selected **Tag All** and saved the parent, the **Issues** field in the attachment (child document) will be cleared of **Damages** and **Fraud**. The only value selected will be the **Contract Dispute** you applied. It does not matter which document you code in the relationship. You may code a child document. If you select the **Tag All** checkbox, it and the coding you chose will be applied to the parent document and any other related documents.

Docking the Linked Documents to Your Detail Page

You can dock the **Linked Documents** section on the **Detail** page for ease of viewing. The **Linked Documents** section is by default at the bottom of your form. You can place it at the bottom of your document, by clicking the **Left Triangle** button. This section will stay this way as you open other documents until you move it back to the form. Return it to the form by clicking the **Right Triangle** button.



Related

Family relationships are organized at **Linked Documents** at the **Related** section at the bottom of your form. Documents with relationships include emails with attachments or source documents and attachments (these are commonly referred to as families with the parent being the email or source document and the attachments as the children.) The number represents the entire number of documents in the relationship (parent and all children).

Click the **Triangle** button at **Related** to expand this section and see a list of all related documents.

The document you are viewing is in the orange, larger font in the list. You can display a related document in the Document pane at the left by clicking it in the list. If the list is large, use the scroll bar to see the entire list. You can code related documents individually from this view by clicking to open each document (the text of the new document displays in the **Document** pane at the left).

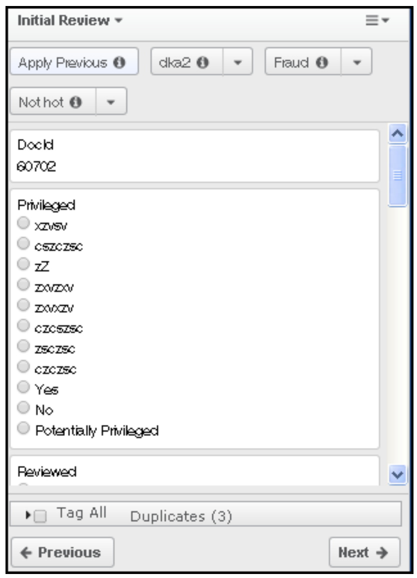
If **Tag All** is available and enabled on your site, you can select the **Tag All** checkbox to code all related documents at the same time and in the same way you are tagging the document you are viewing.

Duplicates

If duplicate documents have been identified on your site, you will see a **Duplicate** section in the bottom of the form. This allows you, when necessary, to open and view the duplicates and use the **Tag All** checkbox to code all duplicates in the same way if available.

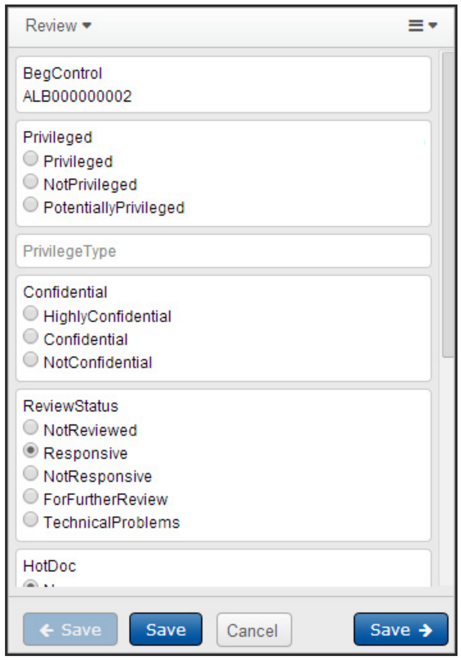
Saving a Record

When you open a document, before making any changes to the fields, the **Next** and **Previous** buttons are available at the bottom of the form, providing quick navigation. This is particularly helpful when you are coding families at one time using **Tag All** and need to quickly move past the family members already coded and saved.



Once a change is made to any of the fields, the buttons at the bottom of the form allow you to:

- Save the changes and navigate to the previous document (**Save with the left arrow** button).
- Save the changes and navigate to the next document in the **Results** set (**Save with the right arrow** button).
- Save the changes and remain in the current document (**Save** button).
- Take the document back to its last saved state (**Cancel** button). Note that this does not null out every field, it simply returns the form to the state it was in prior to your making changes on the form.



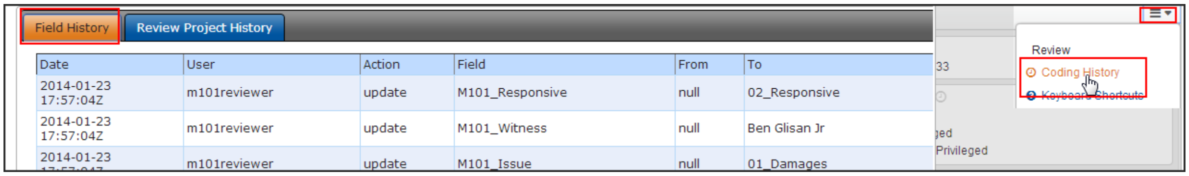
It is important to realize that if you open and view a document but do not change any fields, it is not considered reviewed. If using **Review Projects**, this means the documents will not release automatically when you decide to release documents from a stage. Your administrator will have to release these documents from your assigned documents in order for them to be pushed through the stage in the project.

Keyboard Shortcuts are available. Expand the **Form Options** menu and select **Keyboard Shortcuts** to see a list of shortcuts available for navigating among the documents and saving the record you are in.

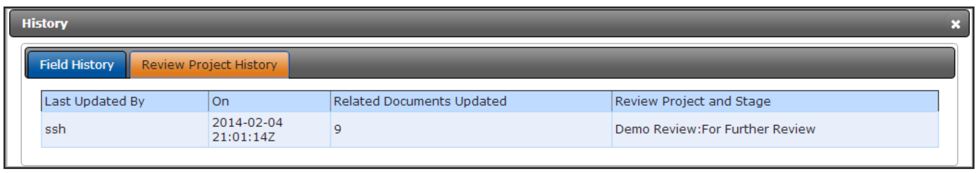
Coding History

You can view the history (audit trail) of changes made to a record while it has been associated to your matter in Insight. Expand the Forms **Options** menu and then click **Coding History**.

At the **Field History** tab, you can see the changes to the document's fielded data, who made the change, and the value or values that were changed. Redaction, conversion and other document changes will also be displayed.



The **Review Project History** displays the stage a document was changed in and the number of related or associated documents coded.



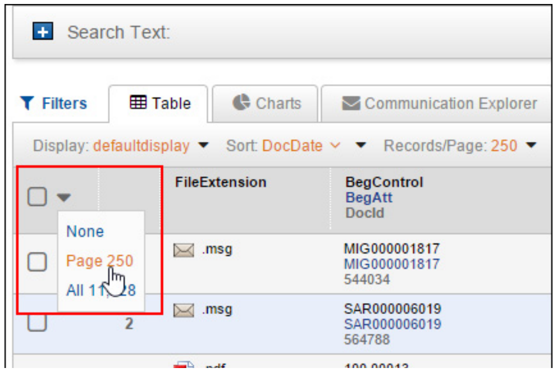
Actions

If you have appropriate permissions, you may take certain actions to documents through the **Results** page, including:

- Copying documents to a folder
- Creating a batch print job
- Exporting selected data from fields of selected documents
- Removing documents from a folder
- Locking documents, so that no changes can be made to the form or unlocking documents
- Batching documents
- Bulk converting documents
- Bulk OCRing documents
- Bulk updating specific fields in documents
- Selecting collections for documents
- Assigning documents to a review project
- Deleting documents
- Sending documents for machine translation

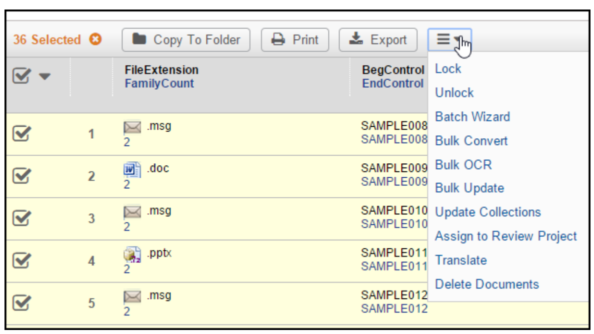
Actions are permission-based, and you will be given rights to conduct the actions you need. You may have access to all the available actions or only specific actions.

In the **Results** page, clicking a checkbox beside a document, enables the **Actions** commands. You can select specific documents, all documents or the current page of documents. Expand the **Selection** menu to see your options.



Typically, you will see the **Copy to Folder**, **Print** and **Export** buttons. Expand the **More Actions** menu to see other commands available to you.

If your **Results** set is the contents of a folder, you may see the ability to remove documents from the folder as well:



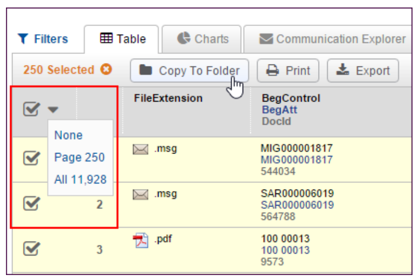
Copy to Folder

Insight allows you to view and work with documents in folders. You also may have the ability to create and edit folders, determine their contents and the other users who may see and access the folders. To create a folder from the **Folders** structure and for more information, see Folders.

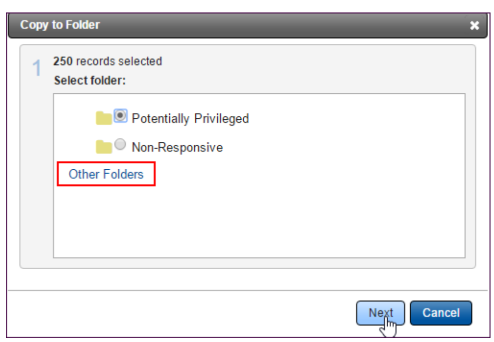
The **Copy to Folder** action in the **Results** page allows you to organize documents into **Static Folders**. You can copy documents from your **Results** page into folders. Copying a document or documents to a folder is not moving the document from one folder to another or creating a new instance of the document. Instead, you are creating a quick hyperlink to your chosen documents in an easy-to-use folder structure.

When using the **Copy to Folder** function, you can use an already created folder or create a new one during the process.

First, select your documents using the checkboxes (remember to expand the menu if you want to select all the documents or the current page). Then, click **Copy to Folder**.



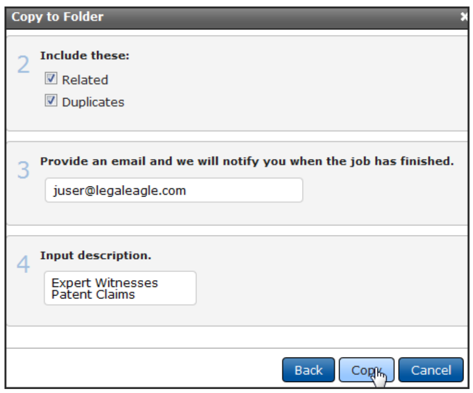
If you have already performed any copy to folder actions, will see a list of your most recently used folders. If the folder you'd like to use already exists, you can select its option button from the list and click **Next**.



If the folder does not already exist, point to the main-level structure (**My Folders**, **Public** or **Production**), click **New** and simply follow the wizard steps. The folder will automatically be selected in your folder list, so you can click Next to complete your copy process.

Copy to Folder Dialog Box

After selecting the appropriate folder to copy your documents, you can choose to include related documents (thereby linking an entire family of documents to a folder) or include duplicates. At Step 2, use the checkboxes to make these selections.



Your email address should automatically populate the Step 3 field; this field is editable if you need to enter a different address.

If you have other descriptive information, you can make it a tool tip by using the **Input description** text box. (This input will display at **Monitors** by clicking **Field/Folder Updates** under **Jobs**.)

Click **Copy** to complete your copy to folder action.

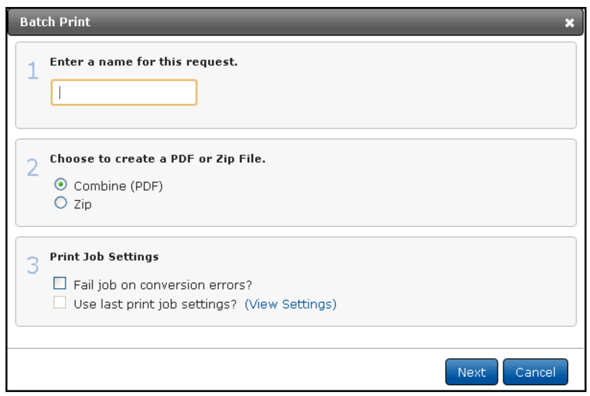
Printing and Downloading Documents

If you have permissions to do so, you can create a downloadable file of selected documents from your **Results** page. The Insight **Print** feature allows you to create a PDF file or a Zip file of the documents you select. You can also choose to replace a document with a redacted version in your print job. If you choose to make a PDF file, you can tailor it for printing to include separator sheets between each document with fielded data, bookmarks, headers, footers, and watermarks. If you choose to zip the records into a folder, you can select to use the native of the record or the HTML preview, which allows for quick opening and doesn't require the native application view the contents of the record.

In the **Results** page, select the document checkboxes and then click **Print** to open the **Batch Print** wizard.

Batch Print Wizard

In Step 1, enter a name for your print job using 5-100 alphanumeric (or Unicode) characters. (You will be prompted if the name is outside the character limit or contains unacceptable characters).



In Step 2, you can select your output file:

- Select the **Zip** option to create a zipped folder of each of your selected documents.
- Click the **Combine** option to create a PDF file, which combines all your selected documents into one PDF file.

Step 3 allows you to enter some settings information. If you want the entire print job to fail if any document fails to convert to PDF, select the **Fail job on conversion error** checkbox. Instead of creating a PDF with some missing documents, the entire job will fail.

The **Use last print job?** checkbox applies your last settings to this print job if you have run prior print jobs, you can click **View Settings** to see the way you customized your last print job.

Click **Next**.

Create a Zipped Folder

If you selected the **Zip** option in the **Batch Print Wizard**, you can make selections for your zipped folder.

At **Additional Documents to Include** (Step 4), select the appropriate checkboxes if you'd like to include related and duplicate documents in your folder.

Additional Options (Step 5) allows you to make some important selections for your zipped folder. Select the **Include Fields as a Load File** checkbox to create a load file. (You will be able to select specific fields in the next section.) You can choose to zip the native record or replace the original version of the record with a redacted version. You can also zip up the HTML preview of the record. The **HTML** option offers a smaller document file size, ensures quick opening of the documents from the zipped folder, and the native application does not have to be loaded to view the record.

If you selected the **Include Fields as a Load File** checkbox in the previous step, you will be prompted to select your fields at **Select fields for load file** (Step 6). Hold down the CTRL key or SHIFT key on your keyboard to highlight more than one field. The fields listed are determined by your site administrator.

Clicking **Next** opens the **Print Summary** dialog box.

Create PDF File (Combine)

If you selected the **Combine** option in Step 2 of the **Batch Print Wizard** and you have applied your Print Job Settings, you can select whether to include related or duplicate documents.

Step 5, **Choose Any of These Options**, allows you to customize your PDF file. Selecting the checkboxes, you can:

- Include bookmarks in your PDF file that will take you to a specific record
- Apply customized footers and watermarks to the PDF
- Insert a separator sheet between each document, so there is clear delineation showing when one record ends and another begins (this checkbox is selected by default, so if you do not want separator sheets between each document, clear this checkbox)

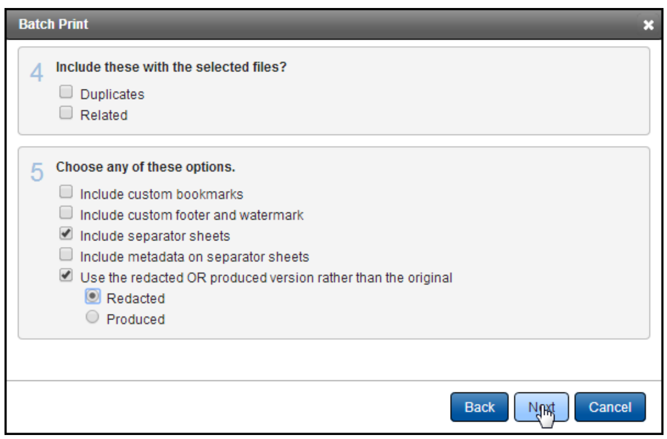
• Include fielded information (metadata) on the separator sheet

• Substitute the original document with a redacted or produced version

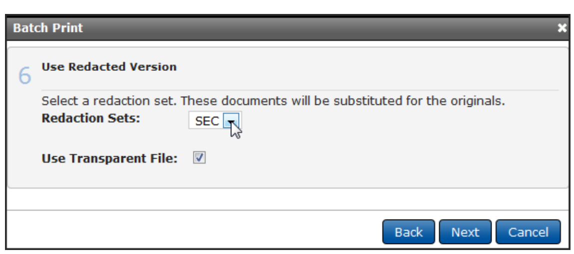
Click **Next** after you've selected the appropriate checkboxes.

Use Redacted or Produced Version

If you selected at Step 5 to include the redacted versions or produced versions of documents, the system only allows you to use one version or the other during this print job. By default the **Redacted** button is selected. You can change it to **Produced** if necessary.



In Step 6, expand the menu using click the appropriate set name. If you are using the redacted versions, you can also select to include the transparency of the redacted document by selecting the **Use Transparent File:** checkbox. This is often useful when you are wanting to first perform a quality check on the document set.

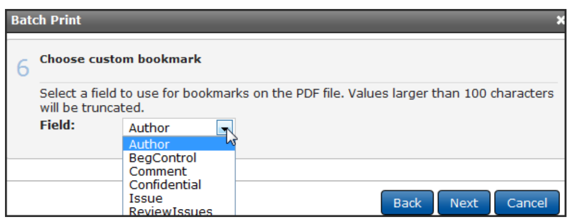


When printing produced versions, expand the **Production Sets** menu and select the appropriate set of produced documents.

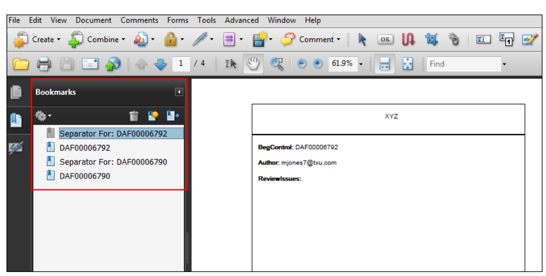
Custom Bookmarks

If you chose to include custom bookmarks at **Choose Any of These Options** in the **Batch Print Wizard**, you can select a field for the PDF bookmark at **Choose Custom Bookmark**.

Using the **Arrow**, expand the menu to see the fields available, and click your field, and then click **Next**. The fields available to use for a bookmark are enabled by your site administrator. You can only choose one field for your bookmarks. If the value populating the field is over 100 characters, the bookmark title will be shortened, if appropriate.



When your print job is ready, readers can quickly go to any document in your PDF file by opening it in Adobe Acrobat and using the bookmarks rather than having to scan the entire PDF file. In this example, the **BegControl** field value of each document is a bookmark.



Footer and Watermark Information

If you chose to include footers and watermarks at **Choose Any of These Options** in the **Batch Print Wizard**, you can design these at Step 7, **Footer Information**.

Select up to two fields to appear in the footer of your PDF. Expand the **Field 1:** menu using the arrow and select your field. If you'd like to include two fields, use the **Field 2**: menu to select your second field. The fields available are determined by your site administrator. You can also enter custom text for the footer. If you selected the **Include Custom Footer and Watermark** checkbox at Choose Any of These Options, you must include either a field or a custom entry for the footer. You will be prompted if you don't. You are not required to create a watermark.

To place a diagonal watermark on each page, enter a short word or phrase in the **Watermark:** text box.

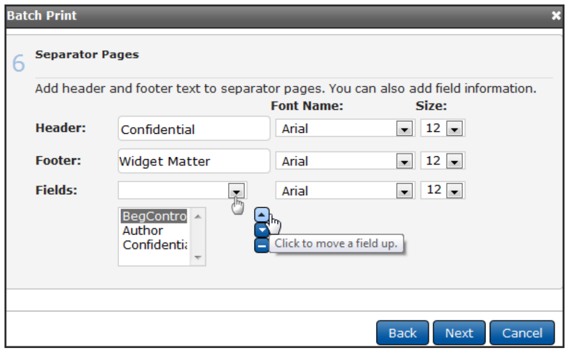
Click **Next** when ready.

All of the footer information will appear in the lower right of each page of your PDF file on a single line. The watermark will appear diagonally across each page of your PDF.

Separator Sheets

If you left the **Separator Sheets** checkbox selected, you will have a separator sheet between each record. If you selected **Include Metadata on Separator Sheet** at **Choose Any of These Options** in the **Batch Print Wizard**, you can select which fielded information to display on your separator sheets and you can create a custom header and/or footer to appear on the separator sheets.

Click the **Field Name** in the **Fields** drop-down list and the field will appear in the box below. You can order the fields using the **Up** and **Down Arrow** buttons. Delete a **Field** using the **Minus (-)** button. You can also select the fonts and font sizes using the appropriate drop-down arrows.



Click **Next**.

Print Summary

The **Print Summary** provides details of your print job, including the name, number of records you selected and the number of jobs ahead of yours in the queue. You can click **Cancel** to delete the print job or click **Back** if you'd like to change anything before initiating the print job.

At the next page, your email address should be automatically populated. You can add it or change it if it is incorrect or does not appear.

Click **Create Batch Print** to complete your print job.

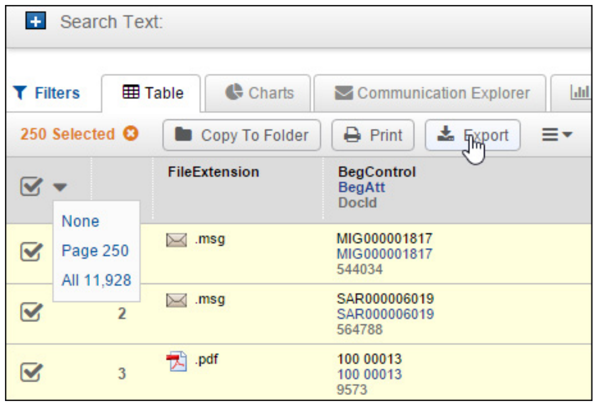
You will receive email notification when the Zip file or PDF file is ready. Access the file and details about your printing job by clicking the **Monitors** button and selecting **Print** under **Jobs**.

Exporting Fielded Information

If you have permissions to do so, you can select and download fielded information about the documents found in your search and save the information in a standard file format, such as Microsoft Excel, XML, HTML, Delimited Text, CSV and Word, or other programs that accept ASCII (comma) delimited format. You can choose metadata fields and fields that have been coded by reviewers to export to your report. You can create, for example, a Privilege Log using **Export**.

Please note that when you use the **Export** feature, you are downloading selected fielded information associated with the documents you choose; you are not exporting the contents of the documents. The **Print** feature allows you to build a downloadable file of a complete record or a set of records.

Select the documents using the checkboxes and then click the **Export** button.



Enter a name for your exported file in the **Job Name:** text box using 5-100 alphanumeric (or Unicode characters. (You will be prompted if the name is outside the character limit or contains unacceptable characters. Your email address should automatically populate the **Email** text box. If it is empty, enter your address. You can also enter a different email if you'd prefer.

If you've created an export file before, you may want to select the **Use last export settings?** checkbox which we create an export using the same settings as your prior export job.

Click the **View settings** link to view your last selections.

When ready, click **Next**.

Select the type of file to export your data into using the **Export Type** option buttons.
For large exports with many rows, OpenText recommends either selecting the **Delimited Text** format or the **Access** format rather than Excel. It will take less time to export.
To view the possible fields for your export file, click the **Plus sign** (**+** button to expand **Export Fields**. To select a specific field, use its **Arrow** button to move it from the **Available Fields** list to the **Fields to Export** list. You can also use the center **Triangle** buttons to move complete lists.

Click **Export**. The window will close, and the job will be submitted. You will receive an email containing a hyperlink for quickly accessing your file when the file is ready. You can also find any exported files at **Export** in the **Monitors** section. Administrators and users with appropriate rights can delete your export jobs in **Monitors**.

More Actions

You may be given permissions to high-level user permissions in Insight that allow you to take other actions to the documents in your **Results** page. These actions include:

- Locking documents, so that no more coding changes can be applied to the document form or unlocking them so that coding can be applied;
- Batching documents (grouping documents together)—documents can be batched by folder or by field;
- Converting multiple documents to PDF;
- Running OCR on documents, which do not have searchable text, making the documents indexable and, therefore, searchable;
- Copying documents to a review project;
- Updating or changing field tags to multiple documents at one time;
- Selecting a collection to place your documents.
- Bulk translating documents

To access any of these features you have permissions to, select your documents in the **Results** page, and expand the **More Actions** menu.

Lock/Unlock Documents

If you have the proper permissions you can lock or unlock documents. Locking makes documents read only— the coding in the form cannot be changed. **Save** and **Save & Next** and certain other functions are unavailable (they will appear dimmed).

You or other users may have the ability to override the locking of documents and apply coding changes when bulk updating.

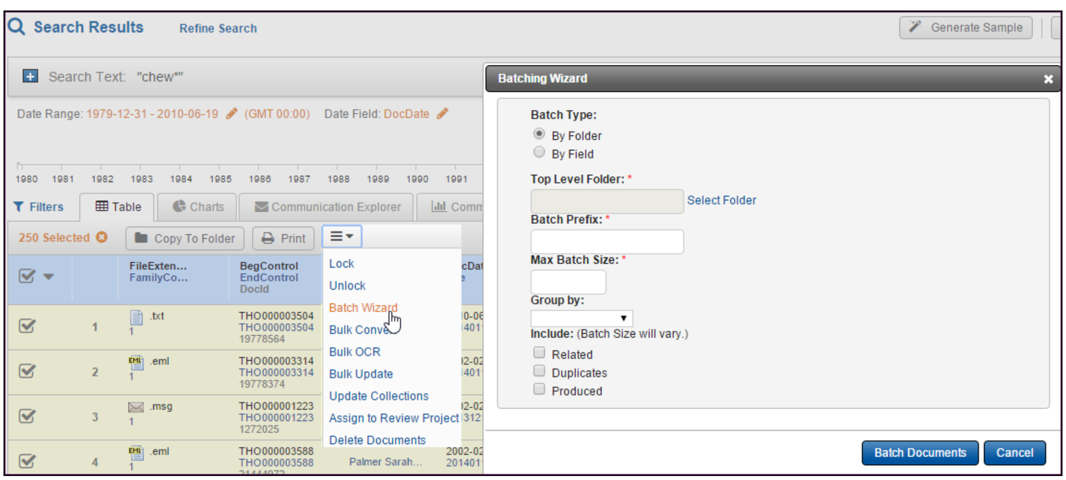
To access this feature, in the **Results** page, and select your documents using the checkboxes. Then expand the **More Actions** menu and click **Lock** (**Unlock** to make documents locked available for coding changes).

Use the **Related** and **Duplicates** checkboxes to lock documents related to or duplicates of the records you selected in the Results page. Then, click **Lock Documents**. The **Unlock** action also allows you to unlock related and duplicates, if applicable.

Batch Wizard

If you have the rights to group or batch documents into folders (batching can be organized by a field or a folder), the **Batch Wizard** action is available when you expand the **Actions** menu. First, you must find the documents you want to batch by running a search or opening another folder. Select the checkboxes of documents you need to batch.

In the **Batching Wizard** dialog box, you have the option to batch your selected documents into a **Static Folder** or to **Dynamic Folders** by a specific field.



Batch by Folder

By default, the **By Folder**, option is selected at **Batch Type**; use this option to batch documents into a **Static Folder**.

Top Level Folder is a required field. To populate it, click the **Select Folder** link. This opens the **Static Folders** structure. Expand the folders, and use the option button beside a folder to select it, and then click the **Select Folder** button.

Once the selected folder populates the **Top Level Folder** box, you must also provide information in the **Batch Prefix** and the **Batch Size** fields.

Batch Prefix

At **Batch Prefix**, enter a 1-14 alphanumeric characters. All batches in Insight will be padded with three zeros to sort properly. The first batch, for example, will be 0001. Batch nine hundred would be 0900. If for example, the prefix you enter is ABC, you will create batches ABC0001 through ABC0900. Typically, we suggest you use a prefix that provides information, such as HOT for documents coded as Hot.

Max Batch Size

Max Batch Size sets the maximum number of documents in each batch. You can choose to batch in any number between 1 and 9999, meaning the smallest batch you may make is 1 document and the largest is 9999 documents. For example, if you have 10,000 documents that need to be reviewed, you may choose to have batches of 500 documents (this is a typical batch size). This will result in 20 batches of documents. If the documents you want to batch total 10,200, you will have 21 batches, with the last batch having only 200 documents, rather than the full 500. Batch size will also be affected if you choose to keep related and/or duplicate documents together.

Group By

Expand the **Group By** menu field and select a field. Choosing to group the batches by a field ensures that documents are kept together based upon the field you select. For example, you may want to group documents by custodian. Documents will be structured by custodian and then batched per number of documents you select. The fields available in the **Group By** menu are configured in **Fields Administration** typically at site setup.

Include Related, Duplicates

To keep the related documents and/or the duplicates in the same batch as the parent/original documents, select the appropriate checkboxes. The document counts may increase in your batches, because the related or duplicate documents will be included in the parent or original document batch. We recommend keeping the families together.

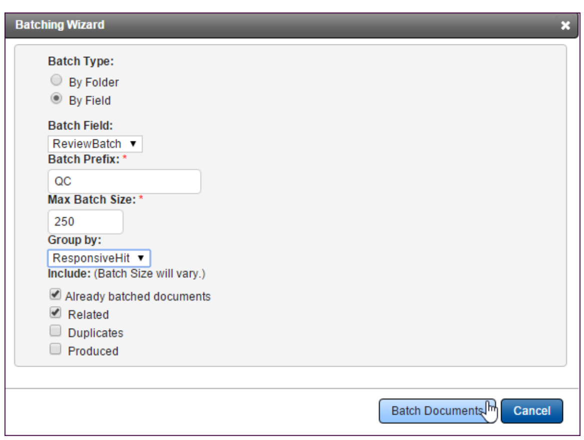
Click **Batch Documents** to execute the batching process.

Batch by Field

Batching documents by a specific field allows you to batch documents to **Dynamic Folders**. You must first set up your **Dynamic Folders** structure at **Administration/Site Configuration/ Dynamic Folders**.

In the **Batch Wizard**, select **By Field** at **Batch Type**. For example, you may want to bulk update all your documents to **Not Reviewed** and then batch your documents into the **Dynamic Folders** by the **ReviewBatch** field. The **Dynamic Folders** structure will be based on the values in this field.

Next, provide the prefix and size, as you would when batching by **Folders**.



Include Related, Duplicates, Already Batched

If any of the documents you selected have already been batched, you'll see the **Already Batched Documents** checkbox. This allows you to re-batch the documents using your new batch prefix, even if previous batch prefixes were applied. To keep the related documents and/or the duplicates in the same batch as the parent/original documents, select the appropriate checkboxes. The document counts may increase in your batches, because the related or duplicate documents will be included in the parent or original document batch.

Click **Batch Documents** to execute the batching process.

You can monitor the progress of the batching process by clicking the **Monitors** button and selecting **Batching**.

Bulk Convert to PDF

For most native files, you can create a PDF version when viewing the opened document; you can also create PDF versions of documents in bulk from the **Results** page.To convert multiple records to PDF, select your documents using the checkboxes. Expand the **Actions** menu and click **Bulk Convert**.

In Step 1, **Check conversion options**, you can overwrite an existing PDF if one exists for a record. Select the **Overwrite existing documents** checkbox.

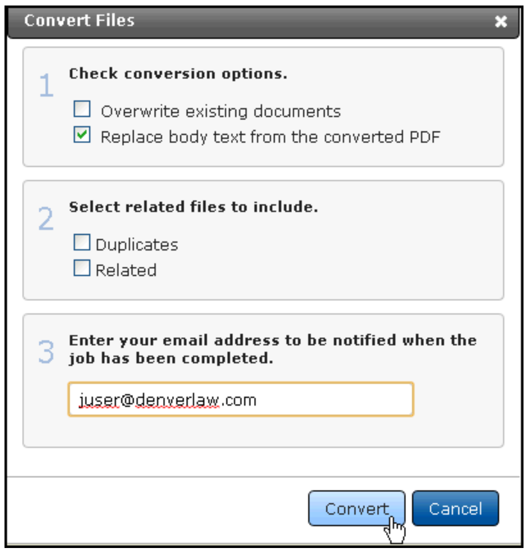
You may also have permission to replace the body text from the converted PDF. This replaces the document's text (for searching and in the HTML view) with the text taken from the PDF version.

Select the **Replace body text from the converted PDF** to use text taken from the PDF rather than from the native file.

Selecting the **Related** or **Duplicates** checkboxes in Step 2 will also convert those associated records into PDF in addition to the records you selected in the **Results** page.

Your email address will automatically display in Step 3. You can remove it if you do not wish to be emailed when the conversion is complete, or change the email address if preferable.

Click **Convert** to execute the conversion process. You can monitor the conversion job at **Conversion** in **Monitors**.



Bulk OCR

If you have appropriate permissions, you will be able to run OCR software on an image record or records directly in the Insight interface; image records typically have extensions such as pdf, png, tif, jpg, bmp, and gif. Once the OCR process is completed, a searchable PDF is appended to the record.

Other file types that require OCR, such as .htm files, have to be converted to PDF before the OCR process is initiated.

If the record were originally uploaded as a PDF or converted to PDF within Insight, during the bulk OCR process you can select to replace the PDF with your new OCR'd PDF. The text of the new PDF is then used for indexing.

To OCR image records, display them in the **Results** page and select your records using the checkboxes. Expand the **More Actions** list and click **Bulk OCR**.

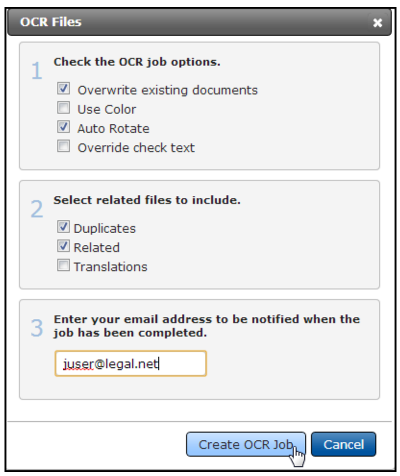
In **Step 1**, **Check the OCR job options**, use the checkboxes to:

- **Overwrite existing documents**—If a PDF of the record currently exists, you can replace it with this new OCR'd version by selecting this checkbox. The text of the new PDF is then used for indexing.

- **Use Color**—If the record is color or image intensive, you may want to select this checkbox to render your document in color rather than black and white.

- **Auto Rotate**—Selected by default. Clear this checkbox if you don't want the OCR process to possibly rotate the document.

- **Override Check Text**—During the OCR process, if a document has a page that has text content, the system, by default, will not OCR it. If you want to force OCR of every page, select this checkbox.



Selecting the **Related** or **Duplicates** checkboxes in **Step 2** will also OCR these associated records if any exist.

Your email address should automatically display in **Step 3**. You can remove your email if you don't want to get receive an email notification. You can also enter a different email if you'd prefer. Click **Create OCR Job** when you've completed your selections and are ready to run the OCR process.

Your OCR job can be monitored at **OCR Jobs** under **Monitors**.

Bulk Update

If you have the rights to do so, you can apply the same coding changes to multiple documents at once through the Insight **Bulk Update** feature. Fields available for bulk updating are established by your site administrator.

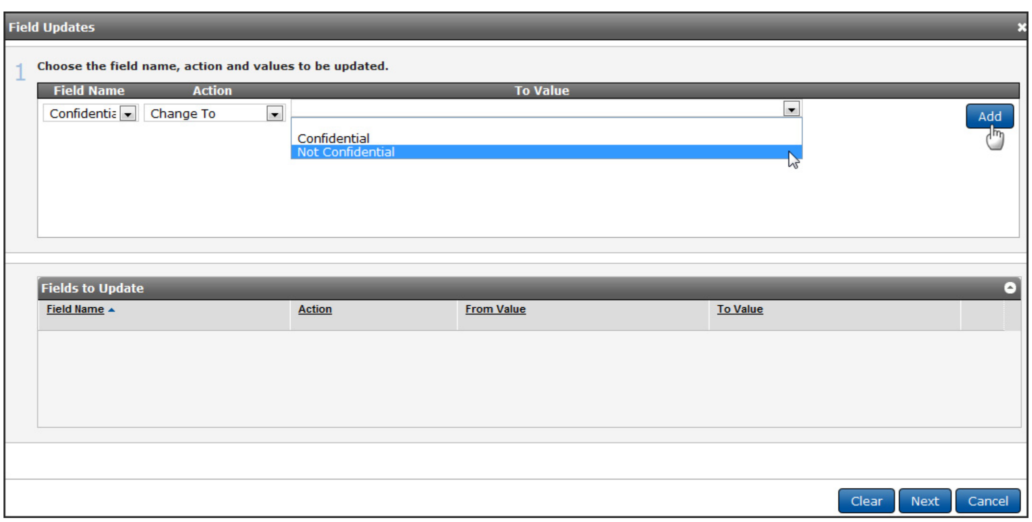
To apply codes to several documents at once, select your documents using the checkboxes, expand the **More Actions** menu and click **Bulk Update**.

In the **Field Updates** dialog box, expand the **Field Name** menu and select your field. The type of field you select determines your next options.

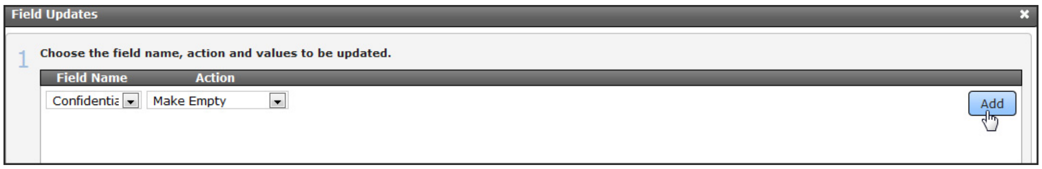
Bulk Updating a Single-Value Field

Single-value fields are fields in which only one coding choice can be made. In the document form, these fields are typically option button fields.

When bulk updating a single-value field, your **Action** selection will be limited to **Change To** and **Make Empty**. Because only one codiing choice can be made, when bulk updating you may select to set the value for all the documents you are updating or you can make the field null, taking it back to an empty field. If you want to change the value for your chosen documents and field, click **Change To**, and then select the value using the **To Value** menu.

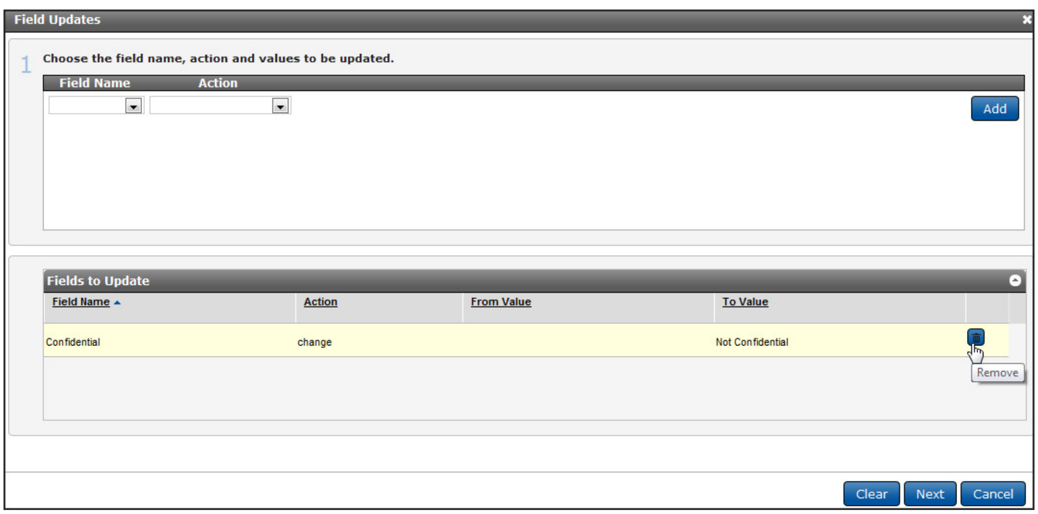


If you want to delete all data in the field, select **Make Empty** in the **Action** menu.



Click **Add** to place your action in the **Fields to Update** section. You can select additional fields you'd like to update as well by following the above steps.

If you don't want to use this bulk update query, you can delete it using the **Remove** button.

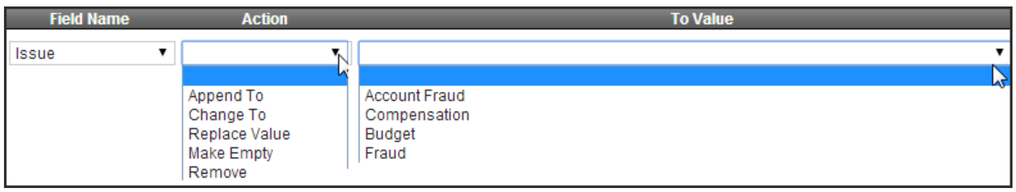


Click **Next** to go to the **Field Updates** dialog box.

Bulk Updating a Multi-Value Field

Mutli-value fields allow users to select and store more than one coding choice or value for the field. In the form of a document, these fields allow users to select checkboxes or a multi-value lookup table to apply one or more codes to a field.

When bulk updating a multi-value field for several documents, click **Actions** in the **Results** page and select your documents. Expand **More Actions** and select **Bulk Update**. Select your multi-value field in the **Field Name** menu. Then, expand the **Action** list menu. Options for multi-value fields include **Append To**, **Change To**, **Replace Value**, **Make Empty** and **Remove**



Append To

If you select **Append To** you will be adding to those values already selected and saved in your selected documents. For example, if the **Issues** field has been coded as **Liability**, and you have determined that **Fraud** also applies, click **Append To** in the **Actions** list.

Next, move the value from the **Available Values** list to the **Selected Values** list using the **Right Arrow** button adjacent to the value. You also remove a value or move all the values using the center **Triangle** buttons.

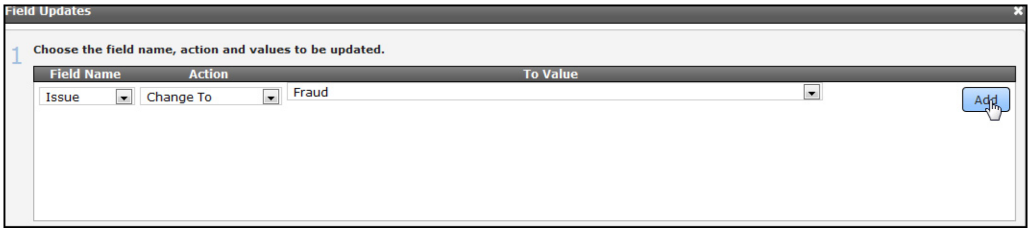
Click **Add** to add the bulk update query to the **Fields to Update** section. Then, click **Next** to go to the **Field Updates** dialog box.

Change To

Select **Change To** from the **Actions** list when you need to delete the value or values that already exist in the field and enter a newly chosen value. For example, if **Issue** were coded with one or more values already selected and saved in your documents, those values would be cleared, and only the value you select will be applied to the **Issue** field in all the documents you selected for bulk updating.

Remember that using the **Change To** action will delete the values currently saved for the field and use the new value you've chosen for bulk updating.

Click **Add** to add the bulk update query to the **Fields to Update** section.

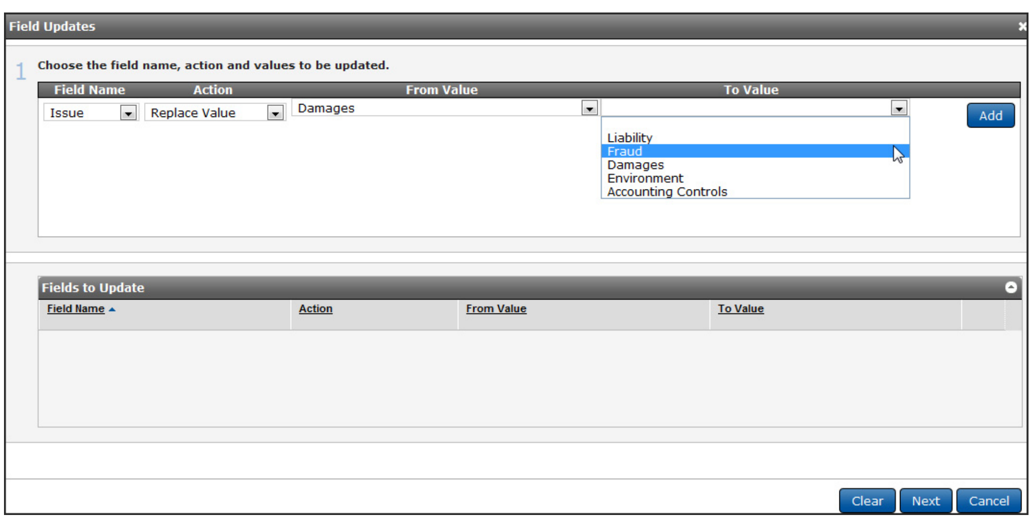


Click **Next** to go to the **Field Updates** dialog box.

Replace Value

Use **Replace Value** to replace an already saved value with another value, much like a find and replace action is used to correct a word or phrase. If the field value to be replaced isn't saved in the document, the replace will not occur. It is important to remember that **Replace Value** is only available in multi-value fields.

Select your **Field Name**, and then choose **Replace Value** using the **Action** list. You must now use the **From Value** drop-down list to select the value to replace. Next, expand the **To Value** list, to select the new value that will appear in the field in place of the older value. Click **Add** to add the bulk update query to the **Fields to Update** section.



Click **Next** to go to the **Field Updates** dialog box.

Make Empty

Select your field in the **Field Name** menu and then click **Make Empty** in the **Action** menu. Next, click **Add**. This update deletes all values in your chosen field.

Click **Next** to go to the **Field Updates** dialog box.

Remove

Select **Remove** in the **Actions** menu at **Update** to remove an individual value or multiple values (you can press the CTRL key to select additional values). The **Remove** option is used when you need to delete one or more values from a field but do not need to make the field entirely null as when using **Make Empty**.

Click **Add** to move your bulk update query to the **Fields to Update** section.

Then, click **Next** to go to the **Field Updates** dialog box.

Field Updates

Once you have added your bulk update query and clicked **Next** to open the **Field Updates** dialog box, your email address should be automatically entered in Section 2. You can change the email address or enter it if it doesn't appear automatically. The system will notify you when your bulk update is complete.

In Section 3, the **Related/Attached** checkbox enables you to include related documents in your update statement. This will apply your changes not only to the selected documents but also to any documents that are linked as related to the selected documents (attachments, parent, other documents designed as related). Please note that the documents must be specifically linked as **Related** for this to apply.

The **Duplicates** checkbox works in the same way for any documents specifically linked as **Duplicate**.

Section 3 also gives you information about your job, which includes the number of documents you've chosen to update and your bulk update job's position in the queue.

Section 4 allows you to apply your bulk update changes to documents that have been locked, meaning that typically changes to the form are no longer allowed. Select the **Override Locked Documents** checkbox.

You can also enter a description about the bulk update job. The description will display in the **Monitor** details. It must be 1-250 (alphanumeric or unicode) characters in length.

Click **Update**.

Make sure you have selected the correct action. You are changing multiple records, and there is no **Undo** button for this action. Your option to correct an incorrect bulk update to records would be to carry out a new bulk update.

Your update job, together with all other users' bulk updates, is posted into a queue.

You can find the status of your job by clicking the **Monitors** button and selecting **Folder/Field Updates**.

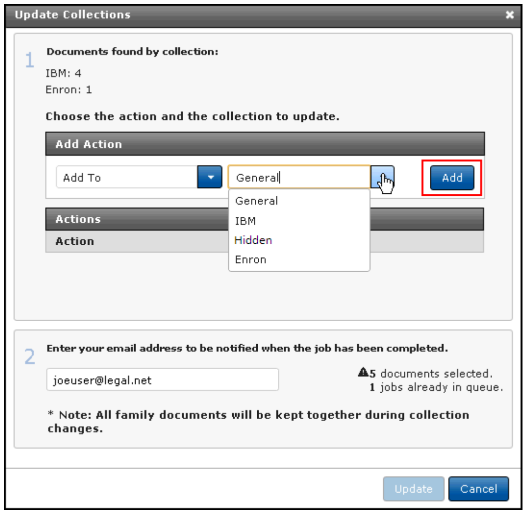
Update Collections

If you have proper permissions you can change the collections for a document or documents.

Documents in Insight can be updated to more than one collection. By updating collections, you are grouping your selected documents into your chosen collection or collections; you can also remove them from a collection, but remember that documents must remain in at lease one collection.

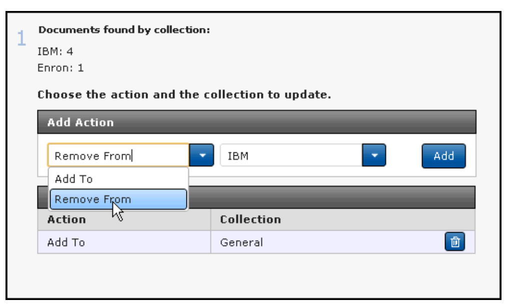
To access this feature, when the appropriate documents are available in the **Results** page, select the documents using the checkboxes. Then expand the **More Actions** menu and click **Update Collections**.

Step 1 shows you the number of documents you've selected and their current collection. At **Add Action**, selecting **Add To** includes the documents to your chosen collection (this does not remove them from their current collection). After selecting the collection, click the **Add** button.

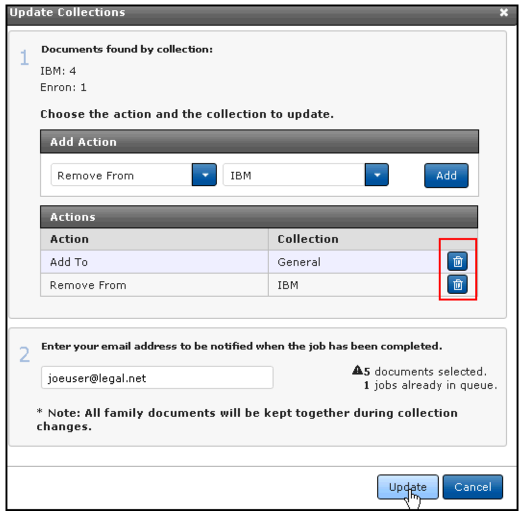


You can include more actions, such as adding the documents to yet another collection.

To remove documents from the collection they currently reside in, select **Remove From** at **Add Action** and select the collection. Click **Add** to carry out this action.



In the below example, five documents will be added to the **General** collection, and four documents will be removed from the **IBM** collection; therefore, one document will reside in both the **Enron** and the **General** collections. You can remove any of the actions by clicking the **Delete** (trash can) button if needed.



Your email address will automatically populate in Step 2. You can edit this field or remove your email address if you do not want notification.

Note that the system will by default move any related documents, keeping families together in collections.

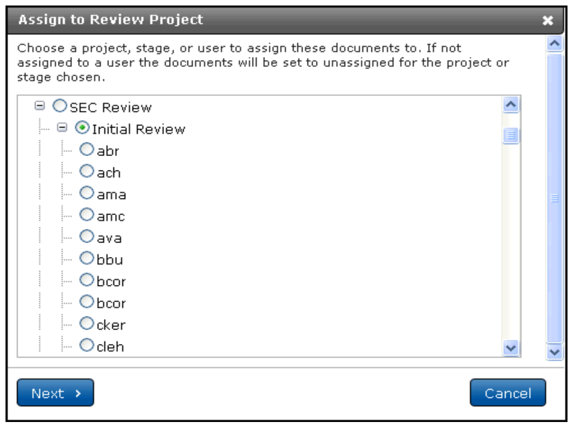
Click the **Update** button when you are ready to update the document collections for your selected records.

Go to **Monitors** to view the status of your update collections action.

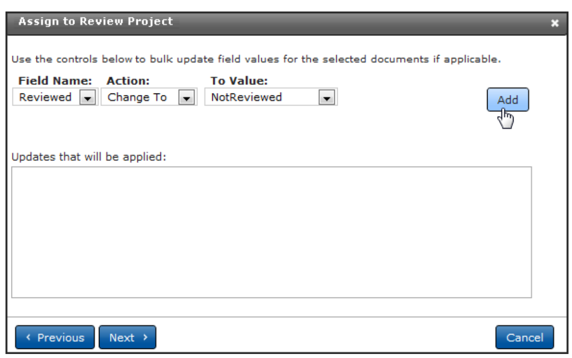
Assign to Review Project

If you have appropriate rights, you can use the **Assign to Review Project Action** to place documents into a Review Project. You must already have the project set up in order to place the documents into the correct stage and assign them to users if applicable.
In the **Results** page, select your documents using the checkboxes. Next, expand the **More Actions** menu and select **Assign to Review Project**.

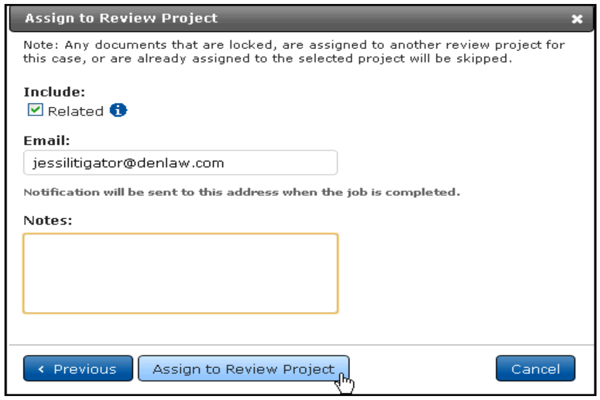
Expand your project using the **Plus sign** (**+**) button. You can use the option buttons to assign the documents to a stage. If the stage is set up to assign documents to particular users, you can select the user within the stage to assign the documents (the user must already be placed in the stage through the Review Administration).



Click **Next** and, if necessary, you can bulk update fields in the documents in the **Assign to Project** wizard (see Bulk Update for more information on using the **Bulk Update** menus). You are not required to bulk update fields.



After clicking **Next**, you can select the **Include Related** checkbox to keep the family relationships together. Your email address should automatically populate, but you can delete or change it if necessary. If you'd like to include any additional information, you can do this at **Notes**. Then, click **Assign to Review Project** will initiate the copy job.



You can track the status of the job by going to **Monitors** and selecting **Review Projects**.

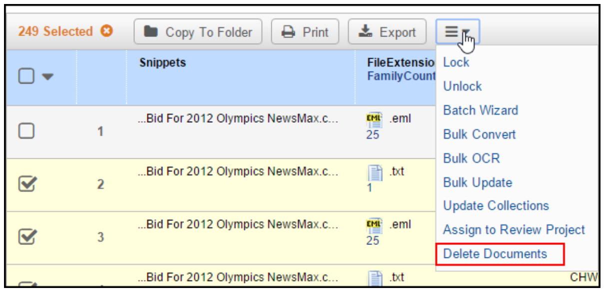
Assign to Predict Project

If you have appropriate rights, you can use the **Assign to Predict Project Action** to place documents into a Predict project. You must already have the project set up in order to place the documents into it. This permission is given only to high-level administrators with Predict training. In the **Results** page, click the **Actions** button, and use the checkboxes to select your documents. Next, expand the **More Actions** menu and select **Assign to Predict Project**. For more information, please see the *Predict Guide*.

Delete Documents From Your Site

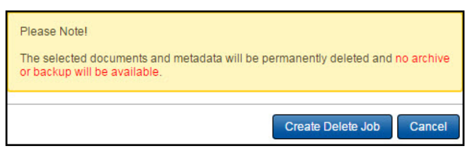
If you are a Case Administrator belonging to a **Role** with the **Delete Documents** permission to you will be able to remove documents from your site. Please only use this feature with great care. If you have not been trained or instructed on deleting documents, please contact your Project Consultant.

When you are ready to delete documents, bring back the records in the **Results** page. In the **Table** view, select documents using the checkboxes, and then expand the **Actions** menu and select **Delete Documents**.



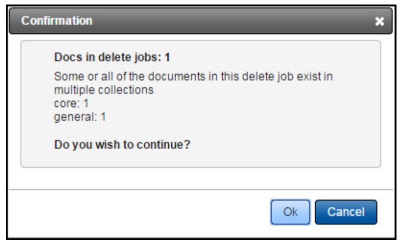
Walk through the wizard. At **Step 4**, you must correctly enter the name of the site to verify deletion. This is an extra security step to ensure you are deleting the correct documents from this site.

One of the most important things to realize with this **Delete Documents** feature is that the documents and their associated records are permanently deleted. There is no way to access the files or the data within the records once they are deleted, except by providing them to OpenText for a new upload. You cannot retrieve the documents on your own and are warned they will be permanently deleted.



Multiple Collections

If the documents you are deleting belong to multiple collections, you will receive a message displaying those collections. You should not delete documents belonging to a **Predict Collection**.



Deleting Documents with Duplicate BegControl Values

On occasion, you may mistakenly upload the same documents through the OpenText automated FTP, resulting in identical records with identical **BegControl** values on the site.

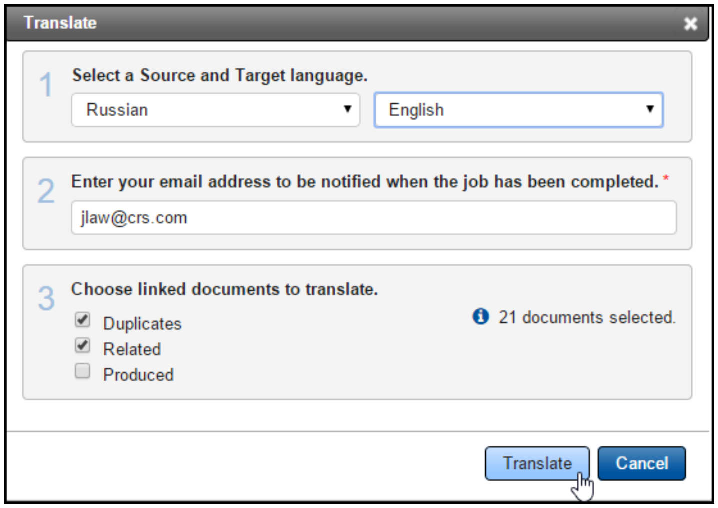
If this happens, do not delete the documents from Insight through the **Delete Documents** feature.

Initiate a ticket request with OpenText via an email to support@catalystsecure.com (copying your Project Consultant). Provide the **BegControl** range of the documents you wish to have removed and the reason for the deletion. OpenText must remove these documents for you. Deleting identical documents using this **Delete Documents** feature will permanently remove all records.

Translating Documents

Documents can be sent for machine translation in the **Results** page. Select the documents using the checkboxes, expand the **More Actions** menu and click **Translate**.

Unlike sending a single document for translation, the system does not determine the source language. Use the menus to set your Source and Target Language. Options available in the Target Language menu depend upon the your Source selection.



Include any other document, and click the **Translate** button. The documents are submitted to the Asia Online machine translation service. Once the translation is completed, the translated versions are linked to their original records as separate records.

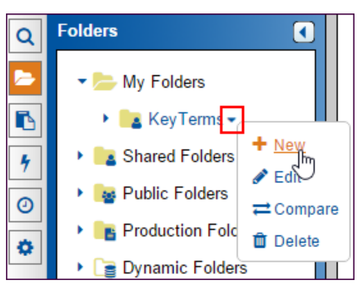
The languages available for machine translation are Arabic, Chinese Simplified, French, German, Italian, Japanese, Korean, Polish, Portuguese, Russian, Spanish, and Thai.

Folders

Insight allows users with rights to folders to view and work with documents in folders. Click the **Folders** button in the left navigation bar to display the **Folders** menu. The permissions to use folders and access to available folder levels are specific to the work you need to do in the site. Static Folders are user defined and allow users quick access to documents. It is important to realize that these folders refer or link to the files associated with them. Documents are not duplicated to the folders or moved to the folders; the documents are pointed to from the folder. Sub-folders available to you within **Static Folders** may include **My Folders**, **Shared Folders** and **Public Folders.**

Production Folders are used to segregate documents for production and to run the production automatically within your site. Typically only high-level users or administrators have rights to **Production Folders**.

Dynamic Folders are virtual folders that make navigating to documents quick and easy. The folder structure is based upon database fields and search queries met when you and other reviewers tag the documents. This folder hierarchy is determined by your site administrator. When you open a **Dynamic Folder**, a predefined search is run. As documents are tagged and saved, they automatically move to the folder that is based upon the new coding. Expand and close the folders using the triangles beside them. Point to a folder to display the **Folder** menu button. Click it to make changes.



Static Folders

Users with folders rights can create, manage and access folders within the top-level **Static Folders**. You may have access to any or all levels, which include **My Folders**, **Shared Folders**, **Public Folders**, and **Production Folders**.

The number of documents allowed per folder is 500,000 documents.

My Folders are the folders you create and can be private to just you or you can share them with select users.

Shared Folders are those folders created by other users and shared with you. You cannot edit or delete these folders. You can access the documents in these folders.

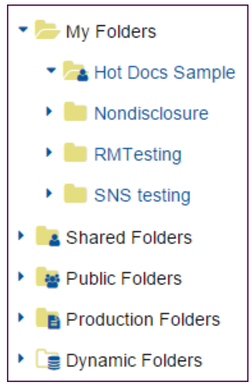
Public Folders are folders made available to everyone on the site. You or other users may have created the folders within **Public Folders**. If you created the folder, you can edit or delete it.

If you have access to **Production Folders**, you will see it in the folder structure as well. This folder is used to run productions through the Insight interface.

To display the contents of any folder available to you, expand to the folder structure using the **Plus** (**+**) buttons beside the folders and then click the folder name. The documents associated with the folder appear in the **Results** page.

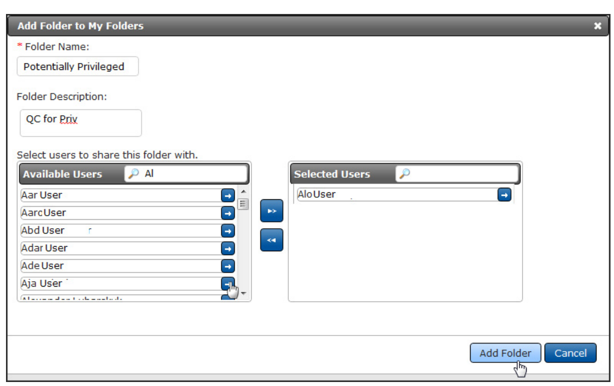
My Folders

To create, edit properties or delete a folder, To create, edit properties or delete a folder, click the **Folders** button to go to the **Folders** page. Ensure you are at the appropriate top-level folder (for example, if you want to edit or create a private folder for just your use or to share with a few other users, you need to work in the **My Folders** top-level folder). If you have existing folders you have already created via the **Folders** page or on the fly, you can view them by expanding **My Folders**. The folders that have a person symbol are folders you have shared with other users.



To create a private or shared folder, point to **My Folders**. Click the **Folder** menu button and then click **New**. In the **Add Folder** dialog box, enter your new folder's name. This is required, and if you enter an invalid character or character length, you will receive a prompt.You can also enter a description, which displays a tool tip when the folder is pointed to. If you want this to remain a folder private only to you, click **Add Folder**.

To share the folder (and therefore the contents) with selected users on your site, use the **Right Arrow** button to place a user in the **Selected User** box (you can also remove a user using the **Left Arrow** corresponding to the user's name). The center **Triangle** buttons allow you to move all users. Click **Add Folder,** and the users you selected will have access to the folder at their **Shared Folders**. If your site is a **Private Field** site, you will only be able to share a folder with users who have the same fields permissions as you.



At **My Folders**, you can also create folders within existing sub-folders (nest folders), edit folder properties, and delete folders. You may also be given the rights to compare one folder's contents to another folder's contents.

If you need to edit the folders properties, upon clicking **Edit** you can change the folder's name, add or edit the tool tip, and change the users who have access. The **Edit Folder** dialog box works identically to the **Add Folder** dialog box.

Shared Folders

To view documents shared with you by another user, click the **Folders** button in the navigation bar and then expand **Shared Folders**. These folders were not made public for everyone on the site to access. While you can open the folders and their contents, you cannot edit the folder properties.

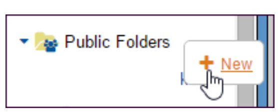
Public Folders

Users with rights to **Public Folders** can access existing folders and create folders within the top-level **Public Folders**. When creating or editing a folder at this level, all users with rights to **Public Folders** will see your folder. As a typical user, you will be able to edit and delete folders you created.

Administrators may have the right to edit or delete folders created by other users in **Public Folders**.

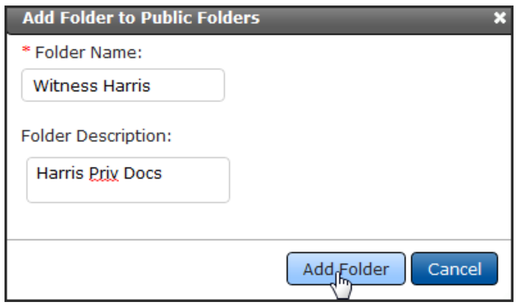
Click the **Folders** button to go to the **Folders** page and expand **Public Folders** to open an existing folder.

To create a new folder, point to **Public Folders**, click the menu and then **New**.



In the **Add Folder To Public Folders** dialog box, enter your new folder's name. This is required, and if you enter an invalid character or character length, you will receive a prompt.

You can also enter a description, which displays a tool tip when the folder is pointed to, and then click **Add Folder**.

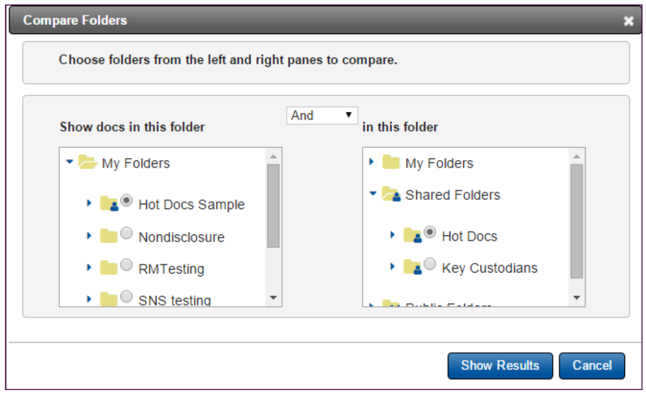


At **Public Folders**, you can also create folders within existing sub-folders, edit folder properties, and delete folders that you have created. You may also be given the rights to compare one folder's contents to another folder's contents.

If you are associated to a Role with the permission **ManagePublicFolders**, you can create sub-folders within user-created **Public Folders,** even those you did not create. This permission also allows you to edit the existing name of a folder in **Public Folders**, move a folder within **Public Folders** to another folder in **Public Folders** and delete folders and sub-folders.

Compare Folders

If you have permissions to **Compare Folders**, point to one of the folders you'd like to compare. In the **Compare Folders** dialog box, the folder you chose will be selected at the **Show Docs in this Folder**. You can keep it selected or change to another. Next, select a folder at **in this folder**. By default, the operator is set to **And**. Leaving it set to **And** will return only documents that appear in both folders when you click **Show Results**. You can change the comparison between the two folders by expanding the menu and selecting **Or** or **AndNot**. Using **Or** will show documents in either folder (in other words, all the documents in both folders). Selecting **AndNot**, will return documents that are in the left folder but not in the right one.



Dynamic Folders

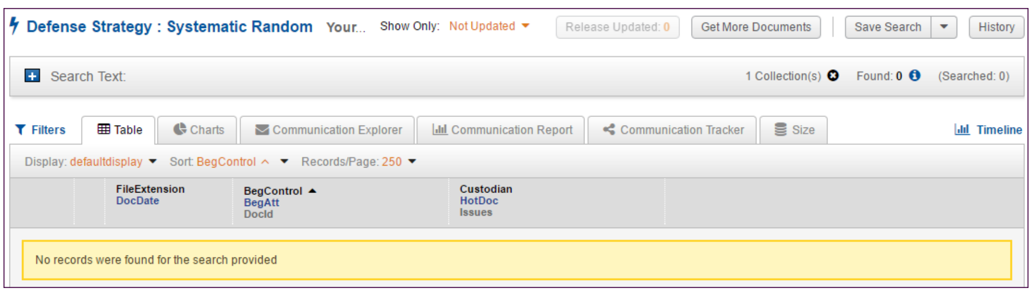
Dynamic Folders are virtual folders set up to structure the review workflow on your site. The structure is based upon fields or search queries. As you code and save a document, the document will move to a different folder based upon the way you coded it. For example, if a document is coded as **Reviewed**, and the **Dynamic Folders** are set up to move documents based upon values in the **Reviewed** field, the document will go into the **Reviewed** folder immediately upon being saved. (Because Insight is XML based, there is no delay for indexing.) To find documents in the **Dynamic Folders**, click the **Folder** button in the navigation bar, and then expand the **Dynamic Folders**. Click the folder you need to review to display the documents in the right **Results** pane.

Reviewing in a Predict or Review Project

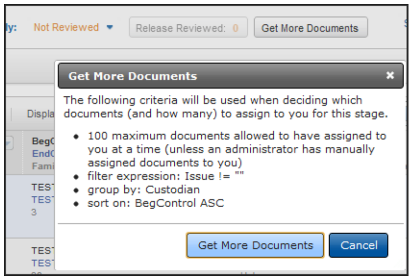
Documents in Your Stage

Your administrator can set up projects within Insight and assign you to stages in which to obtain, view and code records. If you are tasked with using either the **Review Projects** module or the **Predict** module, you will see those buttons in the Insight **Navigation** menu. Click the **Review Projects** (**clipboard**) button or Insight **Predict** button (**lightning bolt**) in the left navigation bar. The project or projects in which you have been assigned is listed in the sub-menu. To review your documents.

1. Expand the project and click the stage. The **Results** page appears at the right. Unless your review manager has assigned documents specifically to you, the page will be empty when you first access it.



2. Click the **Get More Documents** button to obtain documents. If no documents are currently available, the **Get More Documents** button is disabled. When documents are available in your stage, clicking this button displays a summary. This allows you to see the parameters established by your review manager for this stage when you pull in documents. This includes the maximum number of documents you can have in your possession at one time in a particular stage.
3. After reviewing the summary click the **Get More Documents** button.



Your review manager has determined the total number of documents that can be assigned to you at one time in a stage. As you begin to code and save your documents, they will move from the **Not Updated** status to **Updated**. Documents in the **Updated** status are available for release. If the threshold for the stage is 100 documents, and you have coded and saved 50 documents, you will not be able to get more documents until the 50 reviewed documents are released. The maximum number of documents is the total of all your documents for the stage. The default setting for displaying documents in your stage's **Results** page is **Not Updated**. Use the **Show Only** menu and select **All** to display all the documents assigned to you in the stage. Selecting **Updated** will display only those documents you've reviewed, coded and saved. Before clicking the **Release Updated** button and moving your saved documents out of the stage and your permissions, you may want to QC the documents. Selecting **Updated** in the **Show Only** menu allows you to quickly access those documents.

Your administrator can also establish filters that ensure specific documents are reviewed first. Perhaps all documents need to be reviewed in the **First Pass** stage, but certain custodian documents need to be reviewed and coded first. The way your documents are grouped and the order they are displayed can also be set up and will appear in the **Get More Documents** summary dialog box.

As you code and save documents, their status will change from **Not Updated** to **Updated**. Upon closing a document, you will get a **Refresh** dialog box. Click the **Refresh Search Results** button to update your **Results**, moving the reviewed documents out of the **Not Updated** status to **Updated**.

Family Relationships

Typically, **Review Projects** are set up to keep document family relationships together; this means the entire family is treated as one document. If a parent document is assigned to you, all documents in the family will be included when you get documents. Therefore, the limit on the maximum number of documents might be exceeded when families are kept together for review. Additionally, the project is set up to enforce certain rules based on the way documents are coded. When a project is set up to keep families together, the system looks at the rules and the family as a unit. Rules are enforced in order. If Rule 1 is met by any family member (for example, perhaps you are coding and saving an attachment), all documents in the family are considered to meet that rule and move as designated by the rule. Any other rules are irrelevant at that point.

Maximum Number of Documents

Your administrator has determined the total number of documents that can be assigned to you at a time in a stage. As you begin to code and save your documents, they will move from the **Not Updated** status to **Updated** and be available to release. If the threshold for the stage is 100 documents, and you have coded and saved 50 documents, you will not be able to get more documents until the 50 reviewed documents are released. The maximum number of documents is the total of all your documents for the stage, not the total number of not reviewed documents.

Typically, your review manager sets up your project to keep document family relationships together; this means the entire family is treated as one document. If a parent document is assigned as the threshold document, all members of the family will be included when you get more documents. Therefore, the limit on the maximum number of documents might be exceeded when families are kept together for review.

The default setting for displaying documents in your stage's **Results** page is **Not Updated**. Use the **Show Only** menu and select **All** to display all the documents assigned to you in the stage. Selecting **Updated** will display only those documents you've already reviewed and coded. Before clicking the **Release Updated** button and moving your saved documents out of the stage and your permissions, you may want to QC the documents. Selecting **Updated** in the **Show Only** menu allows you to quickly access those documents. In the below image, **Show Only** is set to **Not Updated**. Changing it to **All** will display all 100 documents in the stage. Selecting **Updated** will display the three documents which are reviewed and available for release. The number in the **Release Updated** button shows the number of documents ready for release. The **Found** number represents the number of documents you are currently displaying and will change when you make different selections in the **Show Only** menu.

Advanced Project Settings

You can search within your stage and control your **Advanced Settings** selections. Perhaps you have reviewed, coded and saved a number of documents and prior to releasing them you'd like to QC the documents you previously coded as **Privileged**. You can select to display your reviewed documents using the **Show Only** menu. Then, expand the **Search Text** section and enter your query. See the *Insight Search Guide* for more information on searching in Insight. You will see immediately the number of documents that meet the query. Click the **Search** button to display just those documents.

You can return to displaying all the reviewed documents by clicking the **Delete** (**X**) button at the right in the **Search Text** box.

You can also run searches in your not reviewed documents or all the documents assigned to you in the stage by making the appropriate selection in the **Show Only** menu and creating your query in the same way.

The **Search Text** section of the **Results** page of your stage also allows you to select or clear search settings and collections. Typically, it will be best practice to not limit the documents you display in your stage by these settings. It is always important to be aware of any settings selections as you are working within your stage. In most instances, you will want to ensure all Collections are selected. To do this, click **Advanced Settings** and select all your collections. Clicking the **Search** button will display the documents.

If your review manager has assigned you to a stage and you know documents should be available to you but you getting the message that no documents are available, ensure that you don't have any folders selected and all collections are selected and click **Get More Documents** to access your documents.

Release Documents

Review projects are automated to route documents based upon the needs of the matter. It is very important to release documents you've reviewed. These documents, once removed from your permissions, may remain in the stage until your review manager takes actions upon them or may move to other stages and other reviewers. These decisions of how the documents are routed or kept in the stage are determined by the rules set up for the project and the way you code the documents. For example, you may be reviewing in a **First Pass** stage that may be set up to move documents you've coded as privileged to a **Privileged** stage. The documents do not move or collect appropriately until you release them. Other reviewers may be working in subsequent stages, so releasing your documents may be necessary for them to access them.

Your review manager can also release your documents if appropriate.

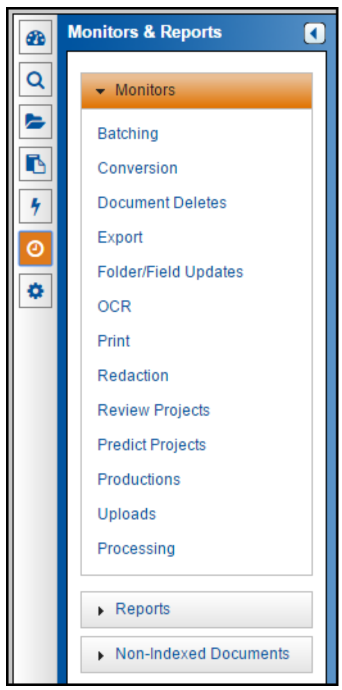
In addition to routing the documents appropriately releasing documents allows you to access and review more documents in the stage.

The **Release Updated** button is always available in the **Results** page of your stage. The number of documents ready for release updates as you save documents the first time. If you open reviewed documents, you can change and re-save them, but the **Updated** status will not change again in this stage. When ready, click **Release Updated**.

If appropriate, you will now be able to access new documents by clicking the **Get More Documents** button. Remember you will only be able to pull in the same number of documents as the number you released.

Monitors and Reports

Click the **Monitors & Reports** button to display information on actions you have performed based upon your permissions. Actions include **Batching**, **Conversion**, **Exports**, **Folder/Field Updates**, **OCR**, **Print**, **Redaction**, **Review Projects**, **Productions**, **Uploads** and **Processing**. If you are a site administrator, you may be able to monitor the actions all the users have taken on your site.



Additionally, most administrators have the rights to the **Reports** feature, which details document activity and user activity within the site. Please refer to the *Insight Administrator Guide* for information.

You may also have the rights to access documents that are not indexed and, therefore, the text is not searchable at **Non-Indexed Documents**.

Batching

Click **Batching** in the **Monitor** menu to review the details of batching jobs. You can review jobs by progress at **Filters** using the **By Status** checkboxes: **Pending** (jobs that are in the queue for conversion; **In Progress** (documents are being batched; **Completed** (jobs that are finalized; **Error** (jobs that caused an error at some point in the process and were not finalized.

Use the **Folder Batch Type** menu to view a report of all batching jobs or the jobs batched by a field or by a folder.

Administrators will see all batching jobs on the site. If you are a typical user on the site, you will see your own jobs.

Once you've made your selections the report displays. The **Folder Batch ID** is a reference number and is useful for working with OpenText Support in troubleshooting jobs. **Group By** displays the field that was selected in the **Batching Wizard** to group the documents. If there is no information in this column, this option was not selected during the batching job. The **Prefix** is the user-selected prefix added to the beginning of each batch name. The **Batch Size** is the user-selected number of documents per batch. The **Created By** and **Date** columns provide information about the user who created the job and when they requested the batching process.The **Status** reflects what stage the job is in.

Buttons available in the **Action** column may include **Delete** (trash can for pending or in progress jobs. The **Job State** button (clock displays details of the job state. If your job produced an error, this is a good place to examine what went wrong. If the job failed, click the **Resubmit** button (right triangle to re-run an errored job.

You can sort the results by clicking any of the column headings. Use the **Refresh** button at the top to refresh the page when you are waiting for **Pending** jobs to finish.

Conversion

Click **Conversion** in the **Monitor** menu to view the status of PDF conversion jobs—both single conversions and those that were done in bulk. You can review jobs by progress at **Filters** using the **By Status** checkboxes: **Pending** (jobs that are in the queue waiting for conversion; **In**

Progress (jobs that are being converted; **Completed** (jobs that are finalized; **Error** (jobs that caused an error at some point in the process and were not finalized. By default each status checkbox is selected. Use the **Conversion Type** menu to monitor single jobs or bulk jobs. Bulk conversions are created in the **Actions** menu in the Results page. Single conversions are created in the document using **Convert to PDF**.

Case Administrators will see all conversion jobs on the site. If you are a typical user on the site, you will see your own jobs.

The report displays information about the conversion jobs.The **Conversion Job ID** is a reference number and is useful for working with OpenText Support in troubleshooting jobs. The **Email**, **Created By** and **Date** columns provide you with information about the user who created the job and when they requested the conversion.**Error Info** provides you with information about why the conversion did not take place. **Status** shows where the job is in the process.

Buttons available in the **Action** column may include **Delete** (trash can for pending or in progress jobs. The **Job State** button (clock displays details of the job state. If your job produced an error, this is a good place to examine what went wrong. If the job failed, click the **Resubmit** button (right triangle to re-run an errored job.

You can sort the results by clicking any of the column headings. Use the **Refresh** button at the top to refresh the page when you are waiting for **Pending** jobs to finish.

Export

Go to **Export** in the **Monitors** menu to review information about export files. You can select to monitor exports based on progress at **Filters** using the **By Status** checkboxes: **Pending** (jobs that are in the queue; **In Progress** (the export file is in process; **Completed** (jobs that are finalized; **Error** (the export job caused an error at some point in the process. By default each status checkbox is selected.

Case Administrators on the site will see all export jobs on the site. If you are a typical user on the site, you will see your own jobs. You can sort the jobs based upon the column headers in the report.

The **Export Job ID** is a reference number and is useful for working with the OpenText Resolution Center in troubleshooting jobs. **Job Name** is the name created for the job. **Username** and **Create Date** show who created the job and when. **Status** shows the progress of the job.

The **Action** column may include **Delete** (**trash can**) for pending or in progress jobs. Click the **View** button (**magnifying glass**) to download the export file. You can save this file to your computer, print it, email it, etc.

The **Job State** button (**clock**) displays details of the job state. If the job produced an error, this is a good place to examine what went wrong.

If the job failed, click the **Resubmit** button (**right triangle**) to re-run an errored job.

You can sort the results by clicking any of the column headings. Use the **Refresh** button at the top of the report to refresh the page when you are waiting for **Pending** jobs to finish.

Folder/Field Updates

Click the **Monitors** button and then **Folder/Field Updates** to display certain updates (**Job Types**) performed from the **Actions** menu in the **Results** page. Case Administrators have the ability to view all users' actions (jobs) and can customize user reports at the **By User** menu. Most users and administrators will see only the actions they have performed. These information about these jobs can be viewed individually by selecting them in the **Job Type** menu and include:

- Copy to Folder
- Delete from Folder
- Bulk Update a field or several fields for more than one record
- Lock Documents
- Unlock Documents
- Organize documents into collections

The report results display in the lower part of the screen and include:

- **Bulk Update Job ID**: useful as a reference to discuss a job with OpenText Support.
- **Created by**: the user name of the person who took the action.
- **Create Date:** displayed in DD/MM/YYYY format, this is the date that the action took place.
- **Total Records:** displays how many records were updated due to the action.
- **Status:** Pending, In Progress, Completed or Error.
- **Job Status:** the summary of the completed job.
- **Description:** the description that the user gave the job when performing the action.

The **Actions** column allows you to remove the job by clicking the **Delete** button (**trash can**). Click the **View** button (**magnifying glass**) to display the job details. Select the **Job State** button (**clock**) to see the steps of the job process, and click the **Resubmit** button (**right triangle)** to re-run jobs that have produced errors.

You can sort the results by clicking any of the column headings. Use the **Refresh** button at the top to refresh the page when you are waiting for **Pending** jobs to finish.

OCR

Click **OCR Jobs** in the **Monitor** menu monitor to review OCR jobs. You can select to monitor OCR jobs based on progress at **Filters** using the **By Status** checkboxes: **Pending** (jobs that are in the queue); **In Progress** (the conversions are in process); **Completed** (jobs that are finalized); **Error** (OCR jobs that caused an error at some point in the process). By default each status checkbox is selected. The **OCR Type** menu defaults to **Bulk**. These jobs are created at the **Actions** menu in the **Results** page. Changing this menu to **Single** will show OCR conversions initiated for a single document within the document page.

Case Administrators on the site will see all export jobs on the site. If you are a typical user on the site, you will see your own jobs. You can sort the jobs based upon the column headers in the report.

The report shows information about the OCR jobs. The **OCR Job ID** is a reference number and is useful for working with OpenText Support in troubleshooting jobs. The **Email**, **Created By** and **Date** columns provide you with information about the user who created the job and when they requested the OCR. **Current Info** provides you with additional details about the job. **Error** Info provides you with information about why the OCR did not take place. **Status** shows where the job is in the process.

Buttons available in the **Action** column may include **Delete** (**trash can** for pending or in progress jobs. The **Job State** button (**clock** displays details of the job state. If your job produced an error, this is a good place to examine what went wrong. If the job failed, click the **Resubmit** button (**right triangle** to re-run an errored job.

You can sort the results by clicking any of the column headings. Use the **Refresh** button at the top of the report to refresh the page when you are waiting for **Pending** jobs to finish.

Print Monitor

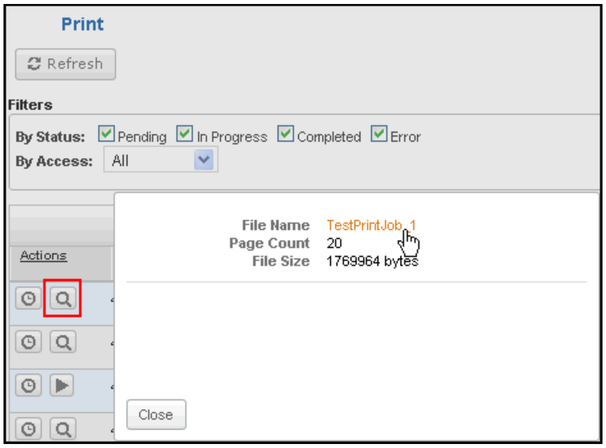
To check the status and obtain other information about print jobs (PDF Combine or Zip, click **Print** in the **Monitors** menu. You can select to monitor documents based on progress at **Filters** using the **By Status** checkboxes: **Pending** (jobs that are in the queue for combining or zipping; **In Progress** (the documents are being combined into PDF, being endorsed, or are in some other step of the process; **Completed** (jobs that are finalized and ready to download; **Error** (jobs that caused an error at some point in the process. By default each status checkbox is selected.

Case Administrators on the site can see all print jobs on the site. Some administrators and users may be given rights to delete other users' print jobs. If you are a typical user on the site, you will see your own print jobs and any print jobs shared with you or made public on the site. The **By Access** menu defaults to **All**, but you can change the menu to **Public**, **Shared** or **Private** to view just those jobs.

You can sort the jobs based upon the column headers in the report.

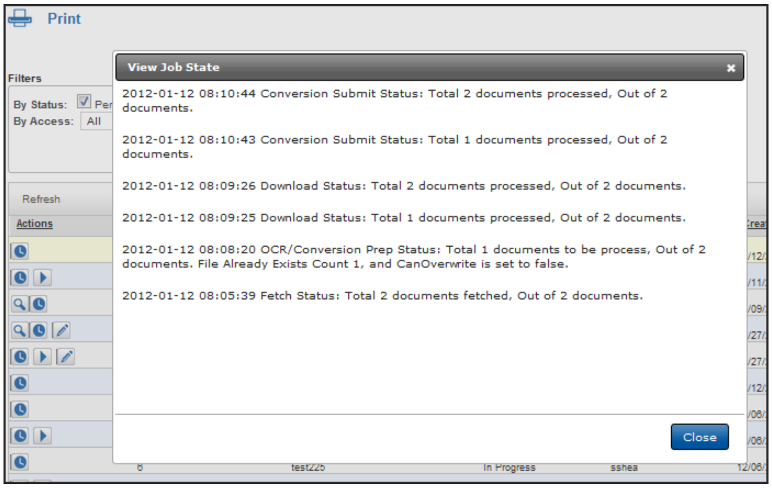
The **Print Job ID** is a reference number and is useful for working with OpenText Support in troubleshooting jobs. **Job Name** is the name created for the job. **Username** and **Create Date** show who created the job and when. The **Total Documents** and **Total Pages** columns show how many documents were selected for the print job and how big the document became after the completion of the job (including table of contents, separator pages, etc.). **Access** shows whether the job was made public, shared or left to private, and **Status** contains information about the print job's progress.

To download your complete print job file, click the **View** (**magnifying glass**) button in the row of the job, and then click the file name.



Buttons available in the **Actions** column may include **Delete** (**trash can**) if you created the print job. After downloading the file, you may want to permanently remove it from the system.

Click the **Job State** (**clock**) button to display details of the job state. If your print job produced an error, this is a good place to examine what went wrong.



If the job failed, click the **Resubmit** (**right triangle** button to re-run a job that produced an error.

Use the **Edit Access** (**pencil** button, which is available for print jobs you created to change the access. Select **Public** or **Shared** to share the print job with other users or make it available to all users. By default, all print jobs are **Private**.

You can sort the results by clicking any of the column headings. Use the **Refresh** button at the top to refresh the page when you are waiting for **Pending** jobs to finish.

Redaction

To monitor the status of redactions, click **Redaction** in the **Monitors** menu. At **By Status**, each checkbox is selected by default—**Pending** (documents in the queue for redaction; **In Progress** (documents in the redaction process; **Completed** (finalized redactions or **Error** (documents that incurred errors during the redaction process; **Redaction Completed, OCR in Progress**; **Redaction Completed, OCR Error**. You can clear or select the checkboxes you need.

The **Redaction Job ID** is a reference number and is useful when working with the OpenText Resolution Center in troubleshooting jobs. **Redaction ID** is the identification number of the redacted document. **Redaction Set** is set that contains the redacted document. **Status** is the state that the redaction is currently in. **Redacted by** and **Date** show who redacted the document and when. Unless you are a Case Administrator on the site, you will only be able to see information on documents redacted by you. **Parent DocURI** is the identification number of the original, non-redacted document.

The **Actions** column allows you to take certain actions on the jobs you are monitoring. Select the **Job State** button (**clock**) to see details about the job process.

Click the **Resubmit** button (**right triangle**) to re-run jobs that have produced errors.

You can sort the results by clicking any of the column headings. Use the **Refresh** button at the top to refresh the page when you are waiting for **Pending** jobs to finish.

Review Projects

To monitor the actions taken to Review Projects, click **Review Projects** in the **Monitors** menu. At **By Status**, each checkbox is selected by default—**Pending** (jobs in the queue); **In Progress** (the action is in process); **Completed** (finalized Review Projects jobs) or **Error** (jobs that incurred errors). You can clear or select the checkboxes you need.

You can leave the **Type** menu set to **All** or expand it to build you report by a specific action:

- Copy to Review Project
- Remove From Review Project
- Move To (this reports on the action of moving to a different stage)
- Assign To
- Release

The **Job ID** is a reference number and is useful when working with OpenText Support in troubleshooting jobs. **Email** shows the email of the review administrator who took the action if available. **Created By** displays who took the action. There is also a **Create Date** column that shows the time the action was initiated. If the review administrator chose to include any notes in the Wizard, this will show at **Notes** and you can see the **Status** and any **Error Info**, if available. The **Actions** column allows you to take certain actions on the jobs you are monitoring. Select the **Job State** button (**clock**) to see details about the job process.

You can sort the results by clicking any of the column headings. Use the **Refresh** button at the top to refresh the page when you are waiting for **Pending** jobs to finish.

Productions

To monitor the status of production jobs, click **Productions** in the **Monitors** menu. Under **Filters** at **By Status**, each checkbox is selected by default—**Pending** (documents in the queue for production); **In Progress** (documents in the process); **Completed** (finalized productions) or **Error** (documents that incurred errors during the process). You can clear or select the checkboxes in order to see the list of productions based on the filters you select.

The **Production ID** is a reference number and is useful when working with OpenText Support in troubleshooting jobs. **Production Name** is the name given to a production job during the set up of the production. If the user who ran the production, entered any extra information, this will display in **Comments**. The user’s email address populates **Email**. If your site has more than one redaction set, the set the documents were pulled from is listed at **Redaction Set**. **Create Date** is system generated and lists when the production was initiated. **Due Date** is entered by the person who created the job and is for reference purposes. If the job contains any errors, you can see this at **Error Info** and you can see the progress of the job at **Status**.

You can sort the results by clicking any of the column headings. Use the **Refresh** button at the top to refresh the page when you are waiting for **Pending** jobs to finish.

Click the **Job State** button (clock) in the **Actions** column to see details about the progress of the production.

The **Status** column lists whether a production is completed or in progress or has failed. Other information about the production is listed in the **Error Info** column.

Create Date	Due Date	Error Info	Status
2013-07-18 08:02:03 AM GMT-07:00		Production complete: 10 of 10 documents, 135 of 135 pages complete	Complete
2013-07-15 04:03:47 PM GMT-07:00		Production complete: 131 of 131 documents, 295 of 295 pages complete	Complete
2013-04-30 02:09:36 PM GMT-07:00		Insight service workflow process complete. Job submitted to production master.	In Progress

Uploads

To monitor the status of upload jobs, click **Uploads** in the **Monitors** menu. By default, the uploads are listed by **Ticket #** in descending order. You can sort by any column in ascending or descending order (these include the **Date**, **Custodian**, **Collection**, **Beg Control**, **End Control** and the **Count**—the number of documents in the particular job). Use the page navigation buttons to go to other pages of tickets. You can use the **Refresh** button to reload the page if you are not seeing a recently completed upload.

In order for the log of uploads to display, the **TicketNumber** field on your site must have a facet built upon it.

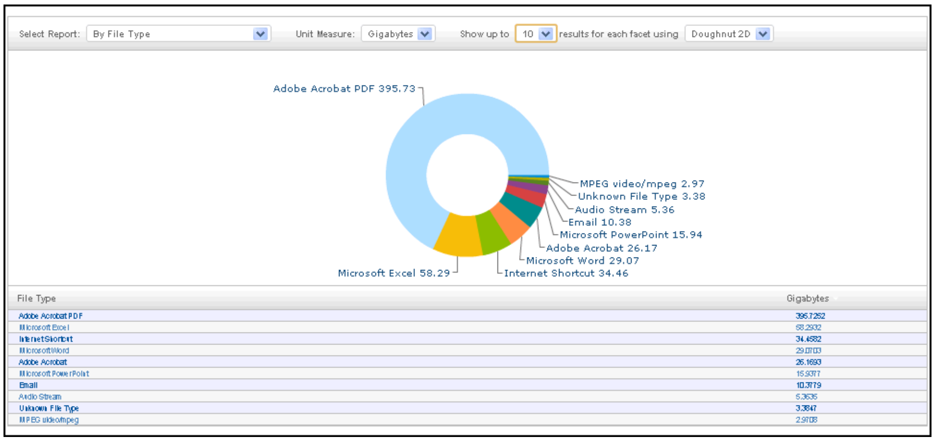
Processing

If you have appropriate rights, you will be able to access reports about processing jobs. Click **Processing** in the **Monitors** menu to display the processing reports associated with your case.

By default, the information is displayed **By Custodian** in both graphic and table format:

You can expand **Select Report** to create reports based on **File Type**, **Media**, **Duplicates Removed by Custodian**, or **Files Excluded by Type**. You can also change the **Unit Measure**, which by default displays **Record** (**document**), to **Gigabytes**.

You can also change the number of results for your information using the **Show up to** menu and graph your information using several different displays including columns and doughnuts:



Non-Indexed Documents

Your site may have documents the system could not index. Click the **Monitors & Reports** button and expand the **Non-Indexed Documents** menu to view the types of indexing errors on your site. Clicking an error runs a query and returns the documents associated with the error.