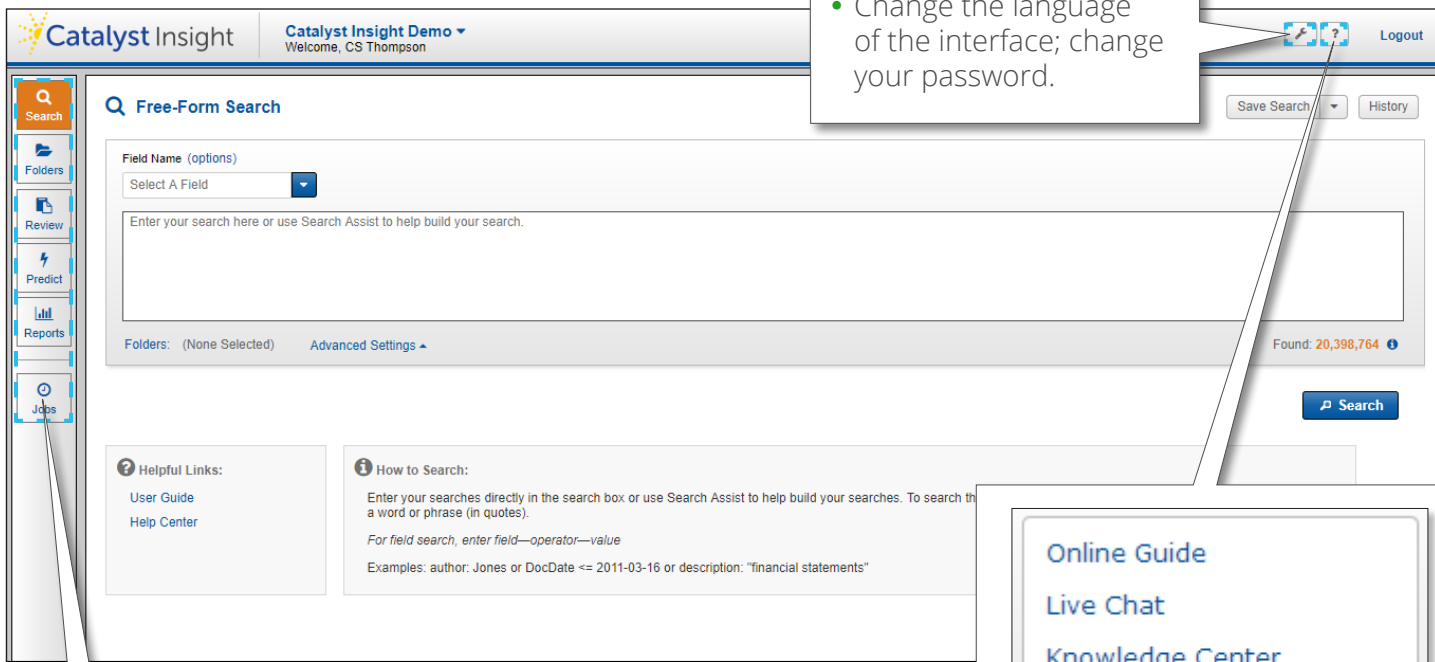


Insight Review

Quick Guide

GLOBAL NAVIGATION



- **Main Navigation:** On the left, your main controls: Search, Folders, Review, Predict, Reports and Jobs. If you are an administrator, you will also see the Dashboard and Admin buttons.

- Change the language of the interface; change your password.

[Online Guide](#)
[Live Chat](#)
[Knowledge Center](#)
[Translation Assistant](#)
[Privacy Policy](#)

- **Help:** Access guides, live help, and other information.



Chrome is the preferred browser.
Chrome Settings

1. Click the Chrome Settings button.
2. Point to and then click History.
3. Click Clear browsing data and then select the items to clear and click the CLEAR BROWSING DATA button.

We also support the Firefox browser.
Firefox Settings

1. In Firefox, click the Firefox Settings button in the top right of the page.
2. Click History and select Clear Recent History. Firefox allows you to choose the activities you want to clear and the date range.

FREE-FORM SEARCH

Enter searches into the search box using the proper search syntax or use the Search Assist to learn the syntax and help you build your search.

- **Search Assist:** Select your Field, Operator, and Value, and then click Add to Search.

Free-Form Search

Save Search History

Field Name (options) Operator Value (Multi-Value) Add Using

Author is (=) Kingsford Jones AND OR Add To Search

Enter your search here or use Search Assist to help build your search.

Folders: (None Selected) Advanced Settings

Found: 20,398,764

Search

- **Found:** Notice the instant record count!
- Click the **i** to see the family count.

Select Search Folders

My Folders

- For Further Review
- Key Documents
- More Like This
- Ranked Docs

Shared Folders

Selected:

- My Folders\For Further Review
- My Folders\Key Documents

clear all

- **Folders:** Search documents that are grouped into folders. Select from My Folders, Shared Folders, Public Folders, Dynamic Folders and Production Folders.

Field Name (options)

Select A Field

Settings

- Case Sensitive
- Diacritic Sensitive
- Stemming

Language: English

Collections all | none

- Enron (1,568,282)
- General (25,354)
- Language (280,124)
- MM Core (1,531,578)
- OS Email (18,713,921)

Folders: 2 Selected

Advanced Settings

- **Advanced Settings:** Customize the search by turning on case or diacritic sensitivity or stemming, set the language (even CJK) and choose secure collections/matters.

i View the [Search Quick Guide](#) for syntax information.

FACETED SEARCH

Some fields have facets built on them. Those fields have special indexes so you can see the counts associated with each value in the field. Using Faceted Search may be simpler than constructing search queries in Free-Form Search when you are searching fielded data.

• Click **+** to add non-faceted field searches or anytext/bodytext searches.

Inserts an OR connector between queries.

Inserts an AND connector between queries.

Inserts a NOT between queries.

1. Add Facets: Select the facets to display on the screen.

2. Select Facet Value: Click or drag and drop a value to one of the boxes on the left.

• Found: Notice the instant record count and family count!

• Click the Enable Auto Update button to narrow the values based upon your selections.

The interface shows a search bar with "Any of These" and "All of These" options. A list of facets is displayed, including "DocDate - (Timeline)" and "Custodian". A bar chart shows the distribution of document dates. A list of document types is shown on the right. The "Found" count is 545,756.

TRACKED SEARCH

Based on the bodytext of the records, find documents using Tracked Search. Narrow by custodian, dates and other criteria.

• Limit search by custodian.

• Limit search by date range.

• Select other criteria.

• Enter a value or partial value, then select the checkboxes to add the words to the search.

The interface shows a search bar with "Any of These" and "All of These" options. A list of tracked search criteria is displayed, including "FRAUD", "FRAUDAR", "FRAUDE", "FRAUDELENT", "FRAUDES", "FRAUDOU", "FRAUDS", "FRAUDSTER", "FRAUDULENT", "FRAUDULENTLY", "FRAUDULENTO", "FRAUDor", and "FraUDrop". A list of custodians is shown on the right. A list of dates is shown on the right. A list of criteria is shown on the right. The "Found" count is 152 of 152 Checked.

RESULTS

- Breadcrumb trail for retracing your path.

- Use other methods to view results, including charts and communication tools.

- Use Filters to narrow your search results.

- Change displays for results.
- Sort documents by selected fields and change the records displayed per page.

- Quick sort on a column.

Search Results [Refine Search](#)

Search Text: BodyText : ["JED" "JED4" "JED5"] Found: 2,081 (Searched: 20,398,764)

Filters Table Charts Communication Explorer Communication Report Communication Tracker Size

Display: Default Display Sort: BegControl BegAlt Records/Page: 100

	BegControl	DocId	FileExtension	FamilyCount	ReviewStatus	Privileged	PrivilegeType	Issues	Comments	HasRedactions	From	To	SentDate	Subject	Title	ReviewStatus	RedactionStatus
<input type="checkbox"/>	3	CHD000002884	579849	.msg	4	NotReviewed	PotentiallyPrivileged										
<input type="checkbox"/>	4	CHD000002881	579886	.msg	1	NotReviewed	PotentiallyPrivileged										
<input type="checkbox"/>	5	CHD000002908	579893	.xls	2	NotReviewed	PotentiallyPrivileged										
<input type="checkbox"/>	6	CHD000008556	583551	.msg	1	NotReviewed	PotentiallyPrivileged	237			Valdes Maria (Maria.Valdes@ENRON.com)			FW: A moment of Zen		NotReviewed	
<input type="checkbox"/>	7	COO000000092	1358498		2	NotReviewed	PotentiallyPrivileged				Erik Cramer cramer@cadvision.com@ENRON (...)			Jan 16 marks.xls		NotReviewed	

- Select document checkboxes to take other actions, such as copying documents to folders, creating print jobs, exporting fielded information, updating fields and more.

Filter Table Charts Communication Explorer Communication Report Communication Tracker Size

100 Selected [Copy](#) [Print](#) [Export](#) [Update Fields](#)

	BegControl	DocId	FileExtension	FamilyCount	ReviewStatus	Privileged	PrivilegeType	Issues	Comments	HasRedactions	From	To	SentDate
<input checked="" type="checkbox"/>	1	BIW000001308	2735998	.xls	8	NotReviewed	PotentiallyPrivileged						
<input checked="" type="checkbox"/>	2	CHD000002169	579154	.msg	4	NotReviewed	PotentiallyPrivileged	237			Chris Dorland	Chris Dorland @ENRON)	2002-01-11 01:12:35 PM
<input checked="" type="checkbox"/>	3	CHD000002864	579849	.msg	4	NotReviewed	PotentiallyPrivileged	237			McCulloch Angela (Angela.McCulloch@ENRO...	Biever Jason; Brodeur Stephane; Burnham Ste...	2002-01-11 01:05:59 PM

- Click anywhere in the table row to launch the document.

DOCUMENT DETAIL PAGE

• Convert to PDF and Redact

• Navigate to other documents.

• Move the form to the left or right of the document, view history and shortcut keys.

• Copy to Folder and Download.

• Select the document display.

• In the Viewer display, use the Thumbnails panel to find specific pages.

• Click Highlights to view Pattern-Based Terms, Static and Search Terms, and additionally, at Your Terms, enter your own term to find within a document.

• Access other forms

• Forms are created and customized by administrators.

• Linked documents (e.g. related, duplicates) are located at the bottom.

The screenshot shows a document titled "The UBSWenergy.com Trader" with a review status of "NotReviewed". The interface includes a top toolbar with "Text", "Viewer", and "Redact" tabs, and buttons for "Copy To Folder", "Download", "Previous", "Next", "Rotate", and "Print". A left sidebar shows "Highlights" and "Thumbnails". A bottom section displays "Linked Documents" including "Related", "Privileged", and "Duplicates".

FOLDERS

• Folder access.

• Static Folders (My Folders, Shared, Public - created by users).

• Based on data fields or searches.

• Point to the folder and click the Triangle to access the Folder menu.

The screenshot shows the "Folders" panel with a search bar and a list of folders. The "My Folders" section is expanded, showing "For Further Review", "Key Documents", "More Like This", and "Ranked Docs". A context menu is open for "For Further Review", showing options: "New", "Edit", "Compare", and "Delete".

REVIEW

- Your Projects and Stages.
- Click the stage to open the Results page and access documents assigned to you.

- Access Review Projects.

Standard Review : Initial First Pass

Show Only: Not Updated

Release Updated: 10

Get More Documents

Save Search

Found: 89

Filters

Table

Charts

Communication Explorer

Communication Report

Communication Tracker

Size

Display: Default Display

Sort: BegControl

Records/Page: 100

	BegControl	DocId	FileExtension	DocCount	ReviewStatus	Privileged	PrivilegeType	Issues	Comments	HasRedactions	From	To	SentDate
1		STK000000082	1470364		NotReviewed	PotentiallyPrivileged					Elizabeth Linnell	Garv Foster	Elizabeth Linnell

- Release Updated documents and Get More Documents to review.

- View documents not yet updated, all documents or updated documents by expanding the Show Only button within the stage.

REPORTS

- At Reports, bring back records that were not indexed by clicking the Indexing Exceptions links.

Reports

Indexing Exceptions

File not found: 40,088

File too large: 4

File password protected: 0

No searchable text (tiff, bmp, jpeg, etc.): 533

Content modified due to size: 0

Other exceptions:

JOBS

- Links to different types of jobs.

Jobs

Convert

Export

Folder/Field Updates

Print

Redaction Burning

Export

Filters

By Status: ☒ Pending ☒ In Progress ☒ Completed

By Job Type: All

By User: All

Copy to Folder

Remove From Folder

Update Fields

Lock

Unlock

Review Bulk Update

Update Collections

Generate Sample

Copy Ranked Documents

View Ranked Documents

- Access Jobs.