

USER GUIDE

CATALYST 
INSIGHT

The Power To See

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Welcome to Insight

Insight is Catalyst's revolutionary e-discovery platform, engineered for the demanding requirements of modern litigation. This guide provides you with information and procedures covering a wide range of user features. The features available to you depend on the rights given you.

Browser Settings

You can work in Insight using a Mac or PC computer. You need a connection to the Internet, a Web browser and a PDF reader to work in Insight. Insight was developed in the [Chrome browser](#), but it is compatible with most major browsers. For opening and viewing PDFs, Catalyst recommends using the free [Adobe Acrobat Reader](#). Please note that while the FoxIt and SchuberJit plugins for viewing PDFs will work with Insight, Catalyst recommends using Adobe Reader with all browsers.

The [Browser Compatibility Chart](#) lists the operating systems and browsers you can use with Insight. Below are Catalyst-recommended settings to optimize your experience.

Chrome Settings

Viewing PDFs

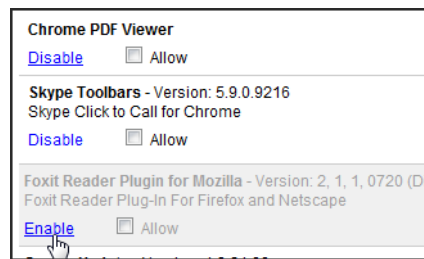
Catalyst recommends working in Insight using the Chrome browser. Insight is designed and fully tested in Chrome. The Chrome browser provides a built-in reader for viewing PDFs from within the browser; however, this Chrome PDF Viewer offers limited functionality when viewing records in the PDF format. You can adjust your Chrome settings to open PDFs in another reader. Catalyst recommends using the Adobe Reader, because Adobe allows you to view highlights in an opened record and the number of pages in the PDF document. You can download a free version of [Adobe Reader](#) if you do not already have Adobe Reader or Adobe Acrobat loaded to your machine.

To set Adobe as your PDF viewer, open the Chrome browser and enter this URL in the address bar: Chrome://plugins.

Find the Adobe Reader section on the Plugins page and click the **Enable** link. This automatically enables the Adobe Reader and disables the Chrome PDF Viewer in the Chrome browser.




If you prefer to use the Foxit Reader or are using a Mac computer with the Schubertjit plugin, enable that PDF reader in the same way:



Clearing the Cache

Catalyst recommends clearing your Chrome cache/browsing history after new releases to the Insight application. You should receive an email when we release updates to the software, and you can also visit the **What's New?** section of our [Documentation Center](#).

To clear your cache, open Chrome and click the **Chrome Settings**  button in the top right of the page.

Point to **Tools** and select **Clear browsing data**.

Expand the **Obliterate the following items** menu to set a time frame for the amount of data you want to delete. Set the **beginning of time** to delete everything.

Select the **Clear Browsing History** checkbox and any other checkboxes for the types of information that you want to remove.

Click **Clear browsing data**.


If you are using a Windows machine, the keyboard shortcut for quickly opening the **Clear Browsing Data** dialog box is CTRL+SHIFT+DELETE. Follow the steps above once in the dialog box.

You can also download a free plug-in for clearing your browsing data in Chrome. There are several free plug-ins available at the [Chrome Web Store](#). Select one and follow the instructions for adding it to your Chrome browser.

Reloading Chrome

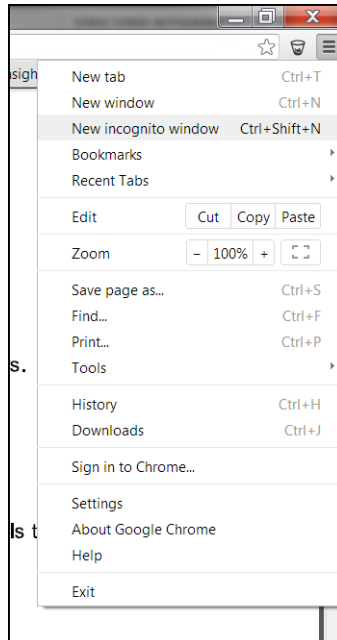
You can reload a document to ensure you are viewing the latest updates/changes to it. To do this if using a Windows machine, use the keyboard shortcut of CTRL+SHIFT+R to reload the page.

Updating your Chrome Browser

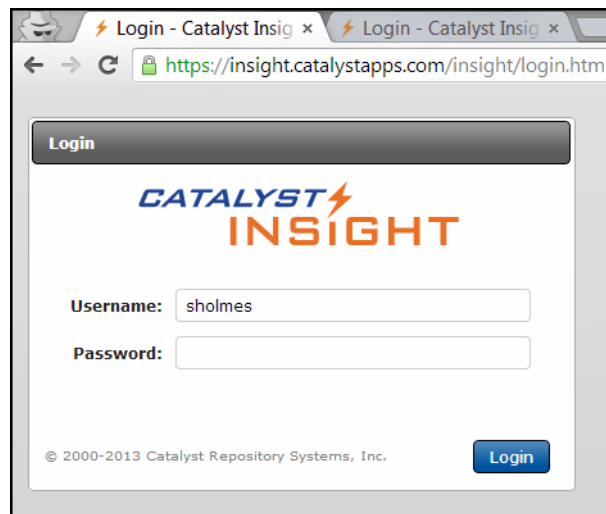
Your Chrome browser needs to be updated if there is an arrow on the **Settings**  button in the Chrome browser tool bar. Click the **Settings** button and then click **Update Google Chrome**.

Multiple Chrome Windows

Insight can be opened in two separate Chrome windows at the same time by using the **Incognito Window** feature. To do so, select **New incognito window** from the **Settings** button. Or use the keyboard shortcut CTRL+SHIFT+N. Open two of these windows.



You can log in to Insight from within each **Incognito window** without loss of functionality. You can combine the two tabs into a single window by dragging one **Incognito window** into the other.

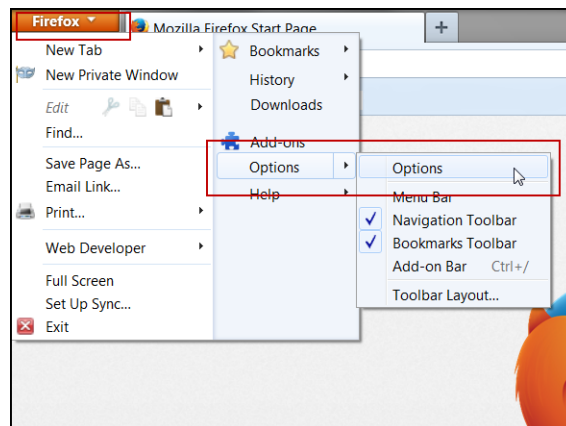


Firefox Settings

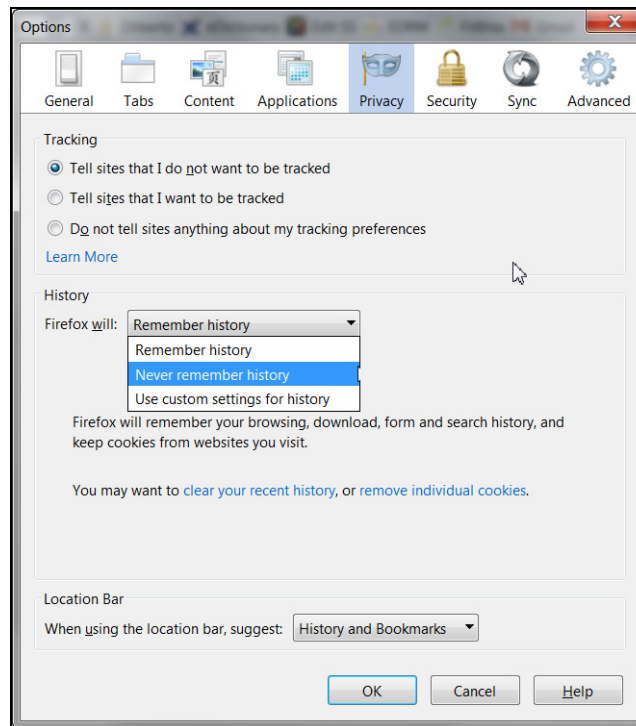
Before using Insight in Firefox, it is recommended that you have the latest update to Adobe Flash Player installed on the browser to properly display many of the features of Catalyst Insight. To determine if your version of Firefox has the latest update, visit the [Adobe Flash Player](#) page. If your version of Firefox requires an update, follow the Adobe prompts to install the latest version Adobe Flash Player.

Catalyst recommends you clear your cache after a new Insight software upload.

You can also turn off caching when using the Firefox browser. To do this, open an instance of Firefox and point to the **Firefox** button at the top of the screen and then select **Options** from the menu.



In the **Privacy** tab, select **Never remember history** from the **History** menu. Doing so will prevent Firefox from storing any temporary Internet files.

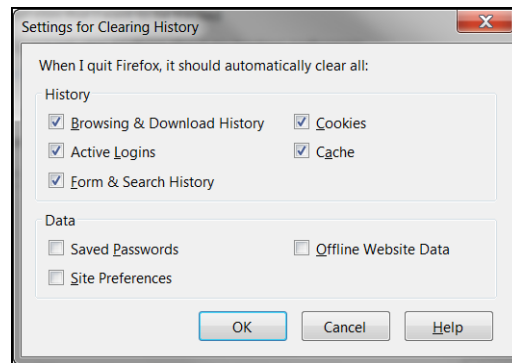


If you don't want to turn off all caching, you can select the **clear your recent history** link at the bottom of the **Privacy** tab prior to reopening records.

You can also customize what Firefox clears or does not save from the **Privacy** tab.

At **History**, expand the menu and select **Use custom settings for history** and clear the **Remember my browsing and download history** checkbox and any others that you'd like to ensure are not saved by Firefox.

You can set up Firefox to clear certain histories when you close all instances of the Firefox application. Select to **Clear history when Firefox closes**, and click the **Settings** button to designate which histories you'd like to automatically clear upon exit.



Safari Settings

Before using Insight in Safari, it is recommended that you have the latest update to Adobe Flash Player installed on the browser to properly display many of the features of Catalyst Insight. To determine if your version of Safari has the latest update, visit the [Adobe Flash Player](#) page. If your version of Safari requires an update, follow the Adobe prompts to install the latest version Adobe Flash Player.

Catalyst recommends clearing your cache in Safari after each Insight software upload. To empty the cache, open an instance of Safari, and point to **Edit** in the main menu, and select **Empty Cache**, and then click **Empty**. Or press CTRL+ALT+E, and then click **Empty**.

Reloading a page always shows you the latest version of the page, bypassing the cache. To reload or refresh the page you are in, click the **Refresh** button in the Safari address field. You can also use the keyboard shortcut of CTRL+R.

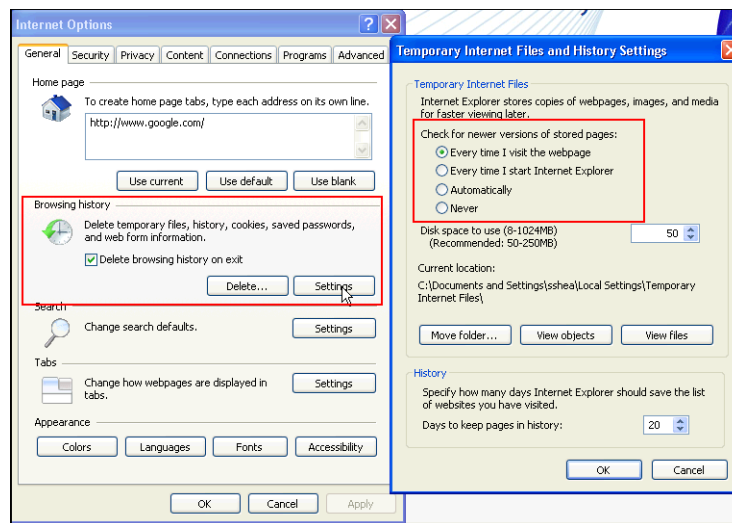
Internet Explorer Browser Settings

Catalyst recommends you clear your browser cache after Insight releases (delete temporary Internet files). To disable browser caching and/or clear your cache of stored, previously viewed web pages, open Internet Explorer.

On the **Tools** menu, click **Internet Options**. In the **General** tab, click the **Settings** button located in the **Browsing History** section.

To delete temporary files every time you exit Internet Explorer, under **Browsing history** in the **General** tab, select the **Delete browsing history on exit** checkbox.

To manually delete temporary files, click **Delete** and select the **Temporary Internet files** checkbox and any other data you want to delete, click **Delete** to confirm, and select **OK**.



IE Trusted Sites

We recommend you add your site to your list of **Trusted Sites** in Internet Explorer to prevent IE from blocking access to records in your site and allowing your records to open normally. Making a website a trusted site is the way you tell Internet Explorer that the website is reliable, and you trust that the files you download from the site will not harm your computer. IE will then allow the information from the site to be displayed. Without doing this, it could result in information not displaying or displaying improperly.

To add your site to your list of **Trusted Sites**, access your Insight case (site) in the Internet Explorer browser, and click **Internet Options** in the **Tools** menu.

Open the **Security** tab, click **Trusted Sites** to enable it, and then click the **Sites** button.

Your site URL will appear in the **Add this website to the zone:** text box. Click the **Add** button, and the URL will move to the **Websites** text box. Click **Close** and then **OK** to close the **Internet Options** dialog box.

Close and restart Internet Explorer.

Adobe Settings

Typically, most sites contain images in Adobe Acrobat's Portable Document Format (PDF). If you are using Adobe Acrobat or the Adobe Reader to view PDFs, here are some changes to view PDF files more quickly on our systems.

In your Adobe application, from the **Edit** menu select **Preferences**. Highlight **Internet** under **Categories** in the left frame. Under **Web Browser Options**, select the **Allow fast web view** checkbox.

We recommend other settings changes based upon your Adobe version.

Acrobat X and XI	No other settings suggestions.
Version 9.0	Make sure the Allow speculative downloading in the background checkbox <i>is</i> selected and click OK .
Pre 9 versions	If you are using a version prior to 9.0, make sure the Allow speculative downloading in the background checkbox <i>is not</i> selected.

Getting Started

To log in to Catalyst Insight, go to the Catalyst website: www.catalystsecure.com. In the top of the page, click **Login** and then **Login to Insight**.

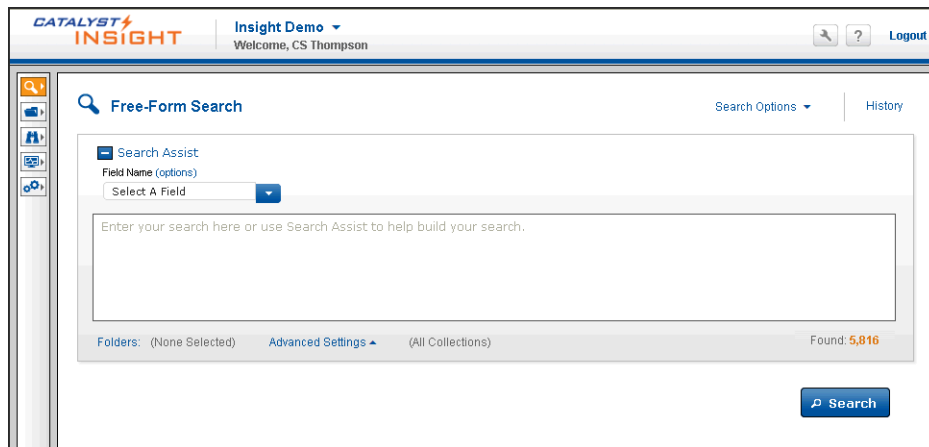


You will be prompted for your Username and Password.

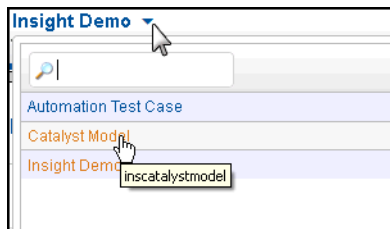


Once you have logged in, you will either be taken to your site, or if you have access to more than one site, you will be taken to a list of your sites.

After you select the case, you will enter the site. You will see your name and the site name (**Case Name**) at the top of the screen, next to the Catalyst Insight logo.



The **Case Name** is a menu. If you have rights to more than one case, click the name of the case you are in, and switch cases by selecting the case in the list:



Navigating in Insight

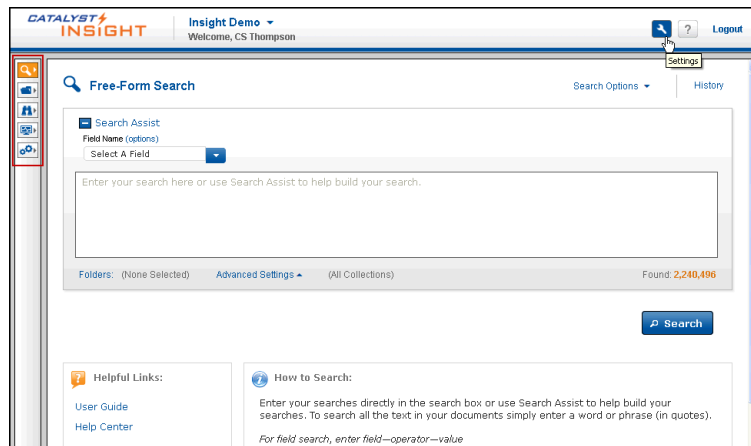
You will see certain buttons and options from every screen in Insight, including your name as well as the **Case Name**, the **Settings** and **Support** buttons, and the **Logout** link.



Remember your case name, so you will be able to quickly identify the site if you need to contact Catalyst Support. This will help the support team more quickly resolve your issue.

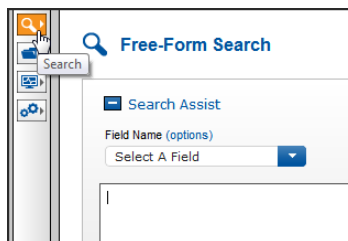
Global Navigation

The buttons on the left side of the screen navigate the site. The buttons you see will take you to the areas of the site to which you've been given access.

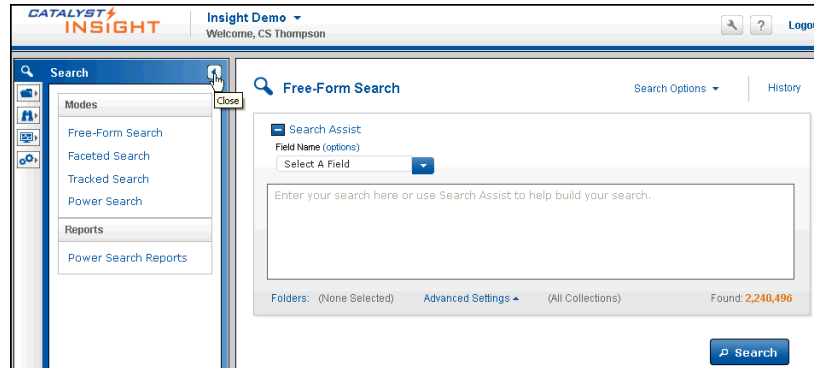


Point to a button in the interface to see the tool tip associated with it. The left navigation bar takes you to different sections of the site, and the buttons you see will be based on the permissions you have. For example, you may have access to **Search**, **Folders**, **Review Projects**, **Monitors**, and **Administration**.

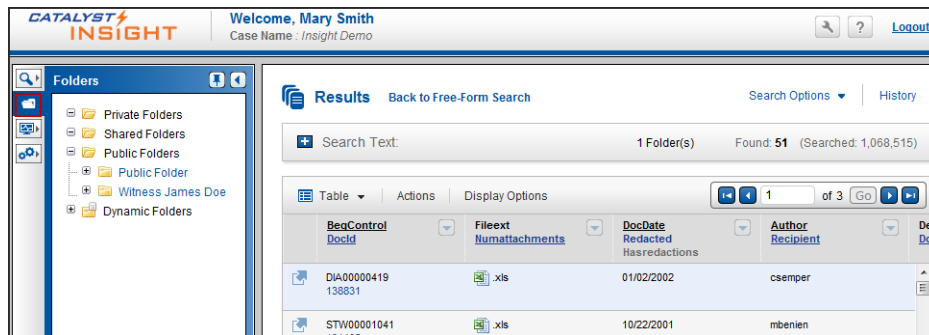
Click the **Search** button to show the **Search** modes.



After selecting your mode, you can use the **Close** button (left triangle) to minimize the **Search** navigation frame and view your selected mode in full screen.



Clicking the **Folders** button takes you to the different types of folders available to you on your site. Some folders are set up by Catalyst or the site administrator, and some are set up by users of the site. Most users have permissions to **Private, Shared, Public** and **Dynamic Folders**. Click the **Plus sign (+)** button next to a folder to expand it and see the sub-folders.



Depending on your permissions, you may not have rights to any folders, or you may see folders in addition to the ones in the above image.

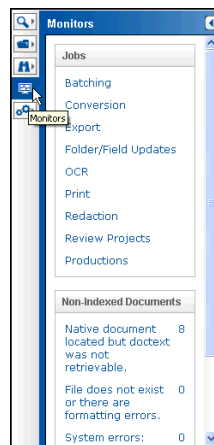
Click the **Review Projects** (binoculars) button to access your documents if you are a reviewer. If you are a review administrator on the site, you will be able to manage your projects by clicking this button as well.



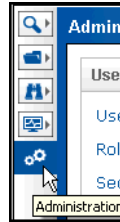
Clicking the **Monitors** button allows you to view information about and the results of actions taken in Insight. Reports, downloads, and other job information can be found here.



Most users can monitor only their actions, but administrators can access all user actions as well as non-indexed documents.




Click the **Administration** button to access the administrative features in Insight. If you are not an administrator, you may not see the button.



Insight Settings and Support

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.

Change Language

Click the **Change Language** button and select the appropriate option. Your choices other than English are Japanese, Hindi and Chinese, either simplified or traditional. Clicking **Choose Language** changes the words on the interface into the selected language.



All menus and options are now displayed in this language.



To return it to English, follow the same steps.

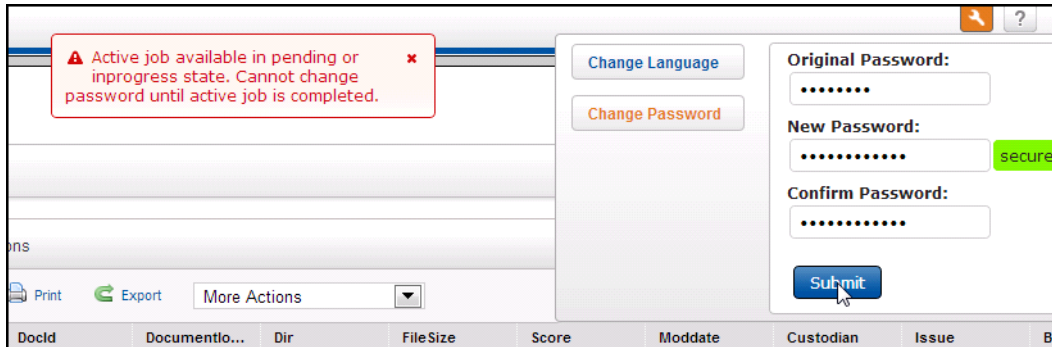
Change Password

You can also change your password using the **Settings** button. Click **Change Password** and enter the original password and the new one. The system will tell you if you have selected a weak or a secure password. You must create a secure password between 8-24 characters, and it must contain at least one uppercase, one lowercase, one special and one numeric character.

Confirm the new password, and then click **Change Password** to complete the change.

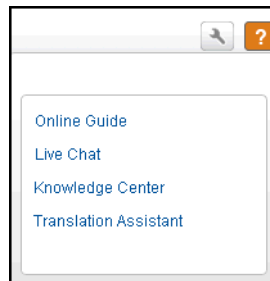


If you have active jobs running, such as batch printing documents, bulk updating, etc., you will not be able to change your password until the job is complete.



Help and Support

Click the **Support** button  to access the **Help** menu.



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

Access the [Catalyst 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.

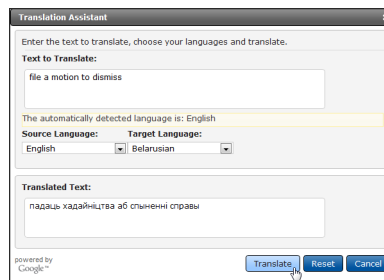
Click **Live Chat Support** from the **Help** menu to start a conversation with the Catalyst Support department. Enter your support needs into the **Chat** box and a technician will respond. If your

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.

Catalyst's Technical Support is also available and can be reached 24 hours a day, 7 days a week at 303-824-0911 or email Support at: support@catalystsecure.com.

Catalyst Insight allows you to translate words or phrases (usually used for searching purposes) with automatic language detection, and it supports 54 languages.

Click the **Translation Assistant** link in the **Help** menu.



Enter the text you wish to translate in the **Text to Translate** box. If you don't select a **Source Language**, the application will attempt to identify the language used and automatically translate the phrase into English. Select the **Target Language** and then click the **Translate** button. Upon successful translation, the text will display. If you don't want to use the automatic language detection, select your **Source** and **Target** languages in the lists provided.

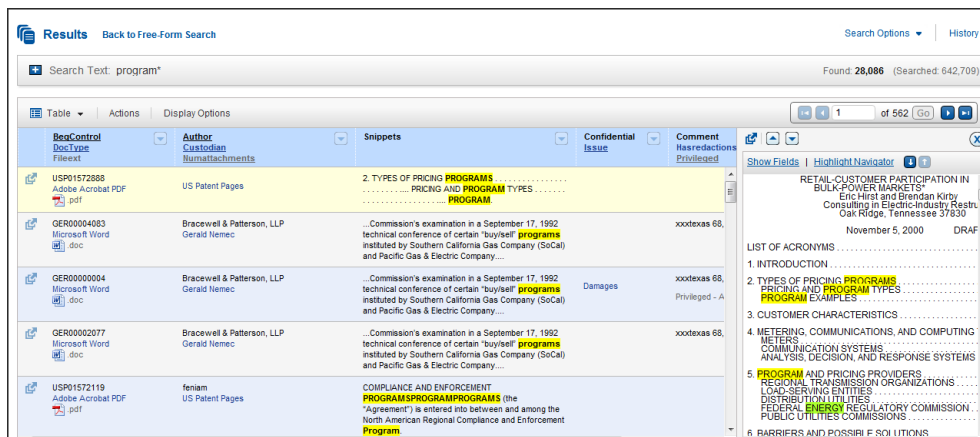
To search a translated word or phrase, highlight it, right-click and copy the text. Then you can paste it into the **Free-Form Search** box. Please refer to [Insight Search](#) for detailed information about searching in Insight.

Results

When you run a valid search or open a folder, the **Results** page displays. The **Results** page is the central location for document activities. It provides access to the documents found. It also shows your search query and the total number of documents your search found. The default display for the document results is the **Table** (column and row) view shown here.



This **Results** page below shows the document preview enabled at the right of the page.



The screenshot shows the 'Results' page with a search for 'program'. The table view displays several results with columns for DocType, Author, Snippets, Confidential Issue, and Comment. A document preview is visible on the right side of the page, showing a table of contents for a document titled 'RETAIL CUSTOMER PARTICIPATION IN BULK-POWER MARKETS'.

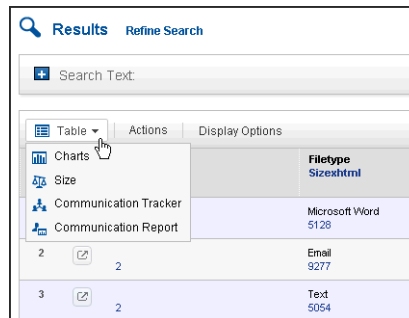
You'll access your documents or preview them in the **Table** view, and you may have more than one layout (displays) at **Display Options**. You'll also be able to establish your sort order and the number of records you'd like to appear on each page.



The screenshot shows the 'Display Options' menu with a mouse cursor hovering over it. The menu items include 'Table', 'Actions', and 'Display Options'. Below the menu, a preview of the current display is shown, including fields for 'BeqControl', 'Author', and 'Snippets'.

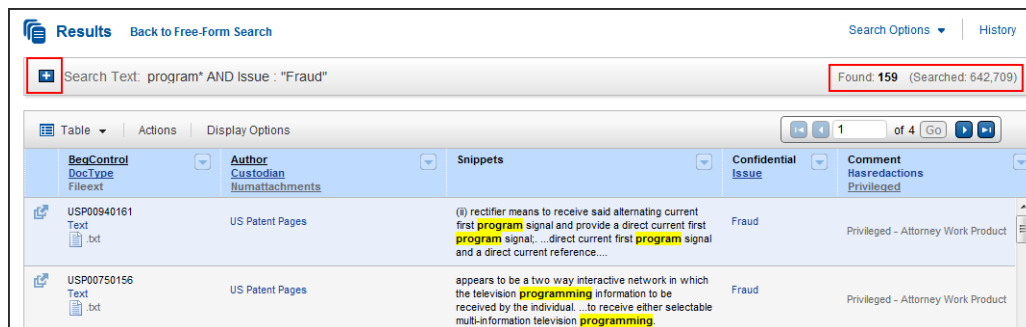
If you have appropriate rights, you can create and save your own displays. Refer to [Edit Displays](#) for more details.

You can retrieve other information and create reports about the documents in your results by expanding the **Table** menu and selecting another view: **Charts**, **Size**, **Communication Tracker**, and **Communication Report**. Refer to [Other Results Options](#) for more information.



Number of Documents Found

The **Results** page lists the number of documents found and the number of documents searched against. Your search query is also listed. To edit it, click the **Search Text Plus (+)** button.



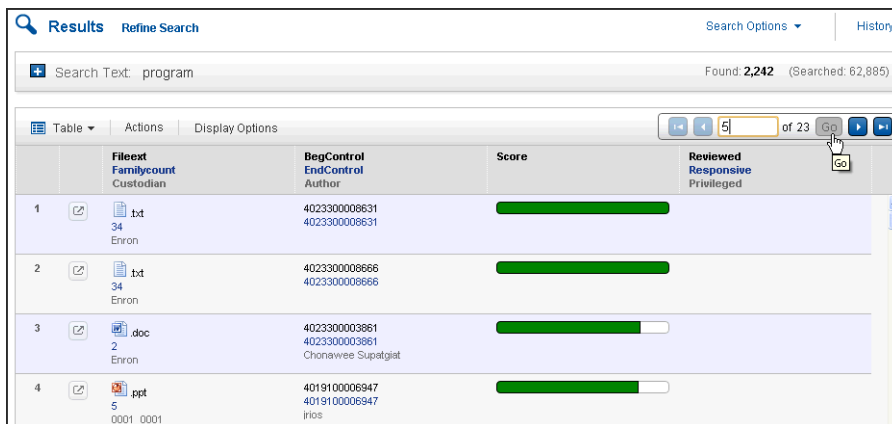
If you've opened or searched a folder, you'll see the number of folders searched and the number of documents found.



Table View

The **Results** page can display 10, 20, 50 or 100 documents per page in the **Table** view (select the number of documents per page in **Display Options**). Use the navigation buttons to go to other pages of results. Enter a number and click **Go** or press ENTER on your keyboard to go to a specific page; use the left and right arrow buttons to go forward or back one page. The double arrow buttons will take you to the first or last page of documents.

You can also leave the page number set to the page you are in and click the **Go** button to refresh the current page of documents.



	Fileext	Familycount	Custodian	BegControl	EndControl	Author	Score	Reviewed	Responsive	Privileged
1	.txt	34	Enron	4023300008631	4023300008631		[Green bar]			
2	.txt	34	Enron	4023300008666	4023300008666		[Green bar]			
3	.doc	2	Enron	4023300003861	4023300003861	Chonawee Supatgrat	[Green bar]			
4	.ppt	5	0001_0001	4019100006947	4019100006947	inios	[Green bar]			

Score

The Insight default sort order for documents displayed in the **Results** page is **Score** (relevance). If the **Score** field is displayed in a column of your **Results** page, you will see an indicator to let you know how the search engine scores or ranks the documents. The score is determined using a term frequency-inverse document frequency (TF-IDF) algorithm. Term frequency (TF) takes into account the number of times a term appears in a document, and this number is normalized to account for the size of the document. Inverse document frequency (IDF) provides a measurement of how rich the document content is. Each time a search is run in Insight, the TF-IDF algorithm calculates the number of documents in the database, the frequency in which the search terms appear in the database, and the frequency in which the search terms appear in the

document. This document score or ranking is displayed when a **Results** page contains the **Score** column; the longer the green bar, the higher the document is ranked.

When your documents are sorted by **Score**, the document with the highest score based upon the algorithm is displayed first with the lowest scored document last. You cannot reverse the order to show the lowest scored document first. You also cannot continue sorting on other fields. You can select other fields to sort your documents by rather than **Score** in the **Display Options**.

Columns

When in the **Table** view of the **Results** page, your documents are displayed with column headers, which are fields associated with your documents. The corresponding fielded information appears in the document row, if available, and the font color of the column header matches the font color of the fielded information in the document row. If your display is set up to show the column header in each row, you'll see this as well as the corresponding data.

Table ▾ Actions Display Options			
	BegControl DocType Fileext	Author Custodian Numattachments	Snippets
...	BegControl : RIR00000029 DocType : Microsoft Word Fileext :  .doc	Author : CA Energy Commission Custodian : Richard Ring Numattachments :	Snippets : Instructions for completing this form are contained in Volume 4 of the guidebook for the Renewable Technology Program .
...	BegControl : RIR00000030 DocType : Microsoft Word Fileext :  .doc	Author : CA Energy Commission Custodian : Richard Ring Numattachments :	Snippets : Instructions for completing this form are contained in Volume 4 of the guidebook for the Renewable Technology Program .

You can quickly sort the order of your documents by clicking certain column headers. Point to the column header. A tool tip will let you know if you can sort your documents by that field. In the below example, clicking the **DocDate** field reorders the documents based upon ascending date order (the oldest document will appear first). Clicking **DocDate** a second time will reorder the records again, but this time in descending order, so the first document will be the document with the latest date.

	Fileext Familycount Custodian	BegControl DocDate	Score Numattachments
1	Fileext : .txt Familycount : 34 Custodian : Enron	BegControl : 4023300008644 DocDate : 1992-06-25 Author :	Score : Numattachments :
2	Fileext : .txt Familycount : 34 Custodian : Enron	BegControl : 4023300008679 DocDate : 1992-06-25 Author :	Score : Numattachments :
3	Fileext : .txt Familycount : 34 Custodian : Enron	BegControl : 4023300008642 DocDate : 1992-09-26 Author :	Score : Numattachments :
4	Fileext : .txt Familycount : 34 Custodian : Enron	BegControl : 4023300008677 DocDate : 1992-09-26 Author :	Score : Numattachments :
5	Fileext : .txt Familycount : 34 Custodian : Enron	BegControl : 4023300008640 DocDate : 1992-09-26 Author :	Score : Numattachments :

When a numeric field, such as the **Numattachments** field is not populated, sorting by this field displays the documents with the null value first when sorted in ascending order or last in descending order.

	Fileext Familycount Custodian	BegControl DocDate Author	Score Numattachments	Reviewed Responsive Privileged
2011	Fileext : .msg Familycount : 1 Custodian : Enron	BegControl : 4023300009169 DocDate : 2000-12-13 Author : Vince J Kaminski (Vince J Kaminski)	Score : Numattachments :	Reviewed : Responsive : Privileged :
2012	Fileext : .msg Familycount : 1 Custodian : Enron	BegControl : 4023300009172 DocDate : 2000-12-13 Author : Jacob	Score : Numattachments :	Reviewed : Reviewed Responsive : Privileged :
2013	Fileext : .msg Familycount : 2 Custodian : Enron	BegControl : 4018800000028 DocDate : 2001-08-22 Author : Lay (Lay)	Score : Numattachments : (1)	Reviewed : Responsive : Privileged :
2014	Fileext : .msg Familycount : 2 Custodian : Enron	BegControl : 40188000000915 DocDate : 2001-08-22 Author : Lay (Lay)	Score : Numattachments : (1)	Reviewed : Responsive : Privileged :
2015	Fileext : .msg Familycount : 2 Custodian : Enron	BegControl : 4023300007064 DocDate : 2000-10-16 Author : Chonawee Supatglat (Chonawee Supatglat)	Score : Numattachments : (1)	Reviewed : Responsive : Privileged :

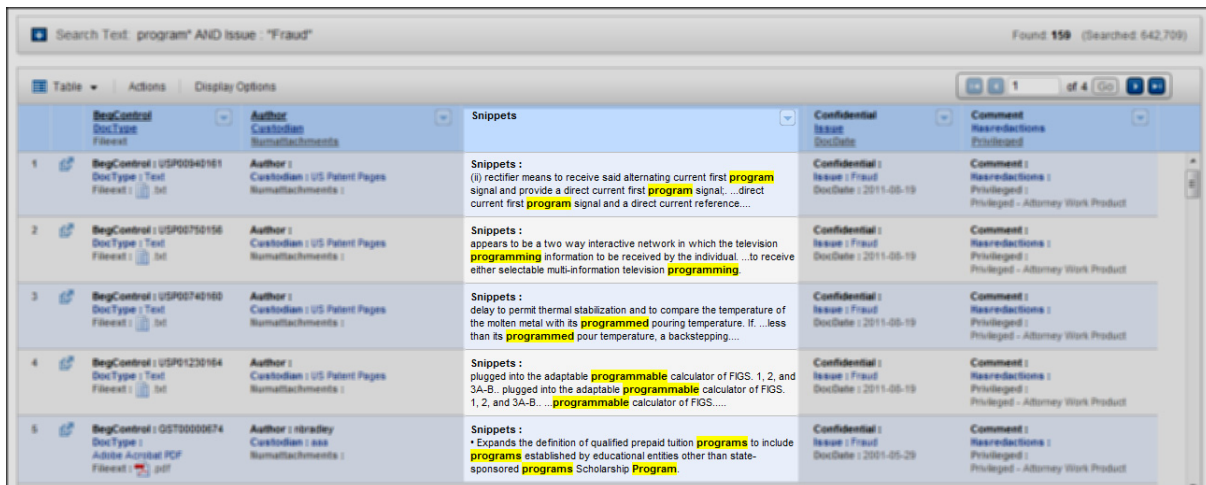
You can fit the contents of a column or all your columns to width. This works like standard text wrapping for cells. Open the column menu by pointing to right part of the column header and clicking the **Triangle** button. You can choose to fit all columns to width or just the column you are in. You can also point to the border of a column, and when the pointer becomes a double-headed arrow, drag the pointer to move the split line.

	Fileext Familycount Custodian	BegControl DocDate	Score Numattachments	Reviewed Responsive Privileged
1	Fileext : .txt Familycount : 34 Custodian : Enron	BegControl : 4023300008644 DocDate : 1992-06-25 Author :	Score : Numattachments :	
2	Fileext : .txt Familycount : 34 Custodian : Enron	BegControl : 4023300008679 DocDate : 1992-06-25 Author :	Score : Numattachments :	
3	Fileext : .txt Familycount : 34 Custodian : Enron	BegControl : 4023300008642 DocDate : 1992-09-26 Author :	Score : Numattachments :	Reviewed : Responsive : Privileged :
4	Fileext : .txt Familycount : 34 Custodian : Enron	BegControl : 4023300008677 DocDate : 1992-09-26 Author :	Score : Numattachments :	Reviewed : Responsive : Privileged :

Snippets

Your **Results** page may contain a **Snippets** field. (If you have rights, you can also add the **Snippets** field to an existing column or create a new display.)

Insight displays snippets of the document text in context with your search terms to provide you with a general idea of how the word or phrase you've searched is used within the text and highlights these terms within the snippet.



BegControl DocType Fileext	Author Custodian Numattachments	Snippets	Confidential Issue DocDate	Comment Reactions Privileged
BegControl : USPO0940181 DocType : Text Fileext : .txt	Author : Custodian : US Patent Pages Numattachments :	Snippets : (i) rectifier means to receive said alternating current first program signal and provide a direct current first program signal. ...direct current first program signal and a direct current reference...	Confidential : Issue : Fraud DocDate : 2011-05-19	Comment : Reactions : Privileged : Privileged - Attorney Work Product
BegControl : USPO0750156 DocType : Text Fileext : .txt	Author : Custodian : US Patent Pages Numattachments :	Snippets : appears to be a two way interactive network in which the television programming information to be received by the individual. ...to receive either selectable multi-information television programming .	Confidential : Issue : Fraud DocDate : 2011-05-19	Comment : Reactions : Privileged : Privileged - Attorney Work Product
BegControl : USPO0740100 DocType : Text Fileext : .txt	Author : Custodian : US Patent Pages Numattachments :	Snippets : delay to permit thermal stabilization and to compare the temperature of the molten metal with its programmed pouring temperature. If ...less than its programmed pour temperature, a backstepping...	Confidential : Issue : Fraud DocDate : 2011-05-19	Comment : Reactions : Privileged : Privileged - Attorney Work Product
BegControl : USPO1230184 DocType : Text Fileext : .txt	Author : Custodian : US Patent Pages Numattachments :	Snippets : plugged into the adaptable programmable calculator of FIGS. 1, 2, and 3A-B. ...plugged into the adaptable programmable calculator of FIGS. 1, 2, and 3A-B. ... programmable calculator of FIGS....	Confidential : Issue : Fraud DocDate : 2011-05-19	Comment : Reactions : Privileged : Privileged - Attorney Work Product
BegControl : GST0000674 DocType : Adobe Acrobat PDF Fileext : .pdf	Author : hBradley Custodian : iss Numattachments :	Snippets : • Expands the definition of qualified prepaid tuition programs to include programs established by educational entities other than state-sponsored programs Scholarship Program .	Confidential : Issue : Fraud DocDate : 2001-05-29	Comment : Reactions : Privileged : Privileged - Attorney Work Product

Document Preview

When **Results** page displays are created, the **Enable Document Preview** may be enabled, which allows you to preview the content of a document without opening the document. To preview a document, click anywhere in the row.

The preview will appear in the right side of the **Results** page. Any hits will be highlighted. You can also use the scroll bar to continue through the preview.

Use the **Up** or **Down Triangle** buttons to go to the previous document or the next document.

To open the document in the document page, click the **Launch Document** button. This allows you to maximize the document and work with any associated forms.

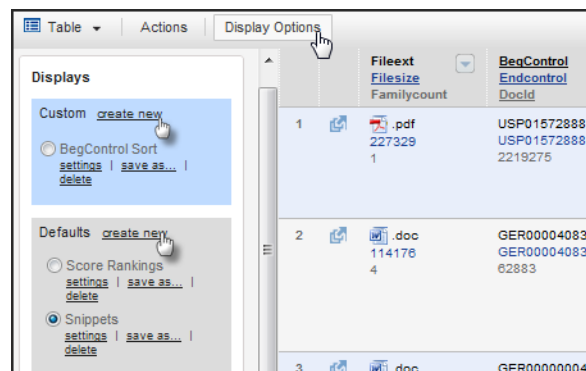
Display Options

If you are a standard user, you may have more than one way to display your results. You can also select fields to determine the order of your results and the number of records displayed per page.



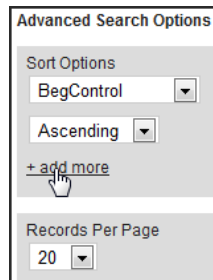
Administrators created one or more default displays for your site. Users can typically create displays for their own use.

To change your display, click **Display Options**. Under **Defaults**, you will see the displays available for your site. If you have created your own display, you'll see it listed as an option under **Custom**.



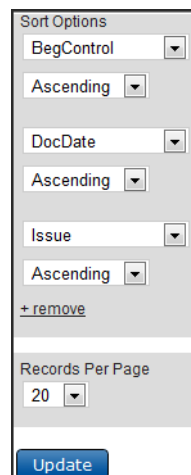
You can also change the way your documents are sorted in your **Results** page. The Insight Default **Sort Order** is **Score**. Documents sorted by **Score** cannot be sorted on subsequent

levels. If you choose to sort your results by fields, select the field by expanding the **Sort Option** menus and making your selection.



The screenshot shows a dialog box titled "Advanced Search Options". It contains a "Sort Options" section with a dropdown menu set to "BegControl" and another dropdown set to "Ascending". Below these is a "+ add more" link with a mouse cursor pointing to it. At the bottom of the dialog is a "Records Per Page" section with a dropdown menu set to "20".

Select **Add More** if you'd like to sort by subsequent fields. You can select to sort by up to three fields, and for each field, you can select ascending or descending order. You can also remove or change a field. Clicking **Remove** deletes the lowest level.



The screenshot shows a "Sort Options" dialog box with three fields: "BegControl", "DocDate", and "Issue", each with its own "Ascending" dropdown. Below the fields is a "+ remove" link. At the bottom is a "Records Per Page" dropdown set to "20" and an "Update" button.

By default, Insight displays 20 records per page. If you'd like your **Results** page to display more or less records, expand the **Records per Page** menu using the arrow to make your selection. Documents can be displayed by 10, 20, 50 or 100 records per Results page.

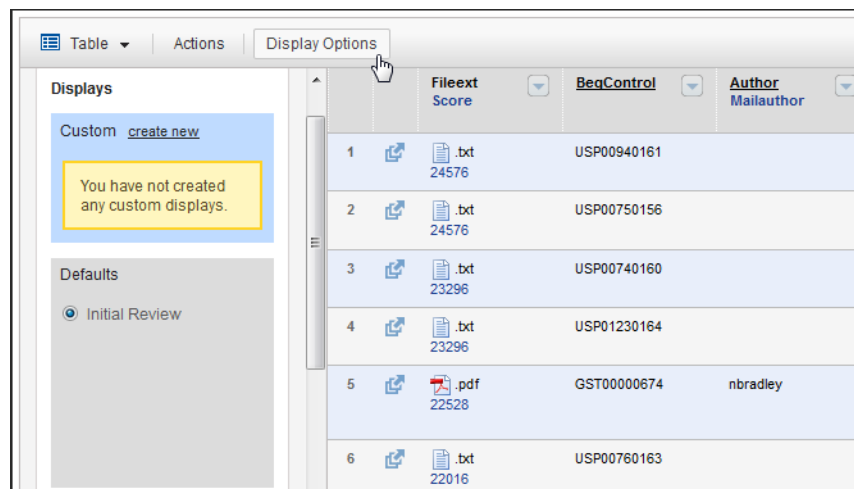
Click **Update** when you've completed your changes. Your **Results** page changes are saved and will display your **Results** page based on your selections until you change them.

Edit Display

If you have **Edit Display** rights, you can create and edit custom displays to use in the **Results** page. You will also be able to edit, reorder, remove and add columns in your custom displays directly in the **Results** page.

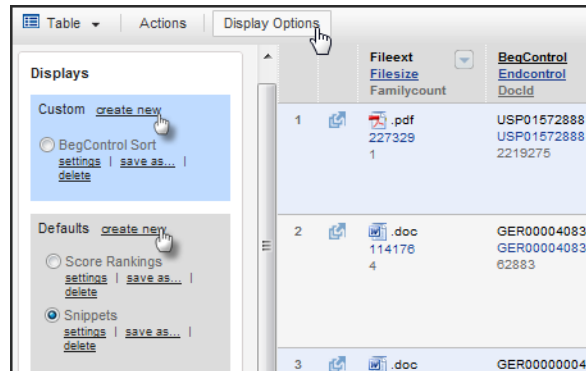
Users with rights to create custom displays cannot change fields or rearrange the columns in a **Default Display**, only in their own custom displays. Administrators have rights to create and edit **Default Displays** for the site.

If you have the rights to create a new display, the **create new** link will be available at **Custom**.

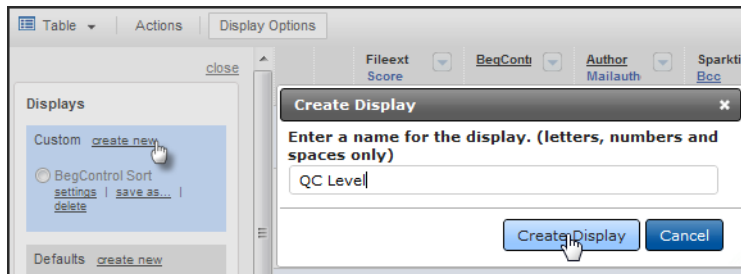


	Fileext Score	BeqControl	Author Mailauthor
1	.txt 24576	USP00940161	
2	.txt 24576	USP00750156	
3	.txt 23296	USP00740160	
4	.txt 23296	USP01230164	
5	.pdf 22528	GST00000674	nbradley
6	.txt 22016	USP00760163	

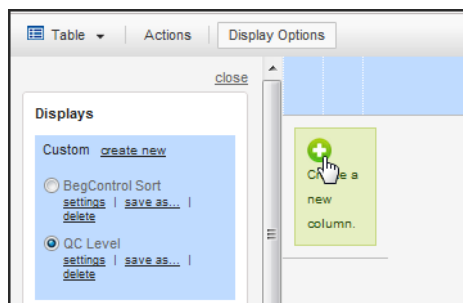
Administrators who will be creating and editing site-wide displays will see the same options under **Defaults** as available in **Custom**, allowing them to not only create displays for solely their use but to also create site-wide (Default) displays.



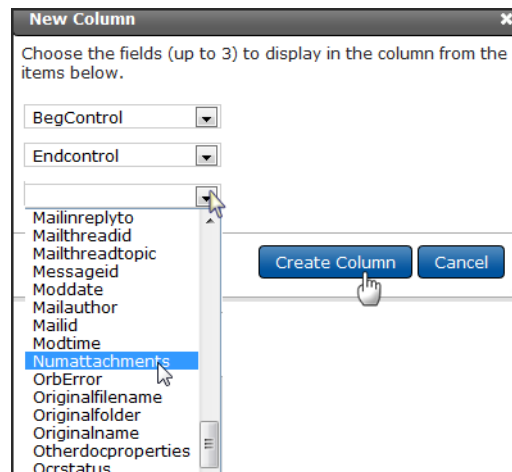
To create a new display, click the **create new** link, enter a name in the **Create Display** dialog box and click the **Create Update** button



Your new display now appears as the selected option. To start adding columns, click **Add a new column.**



Expand the menus in the **New Column** dialog box and highlight a field to appear in the column header. You can add up to three. Then click **Create Column**.



Your new column appears in your display with the results. You can now add and edit columns, change fields, rearrange the layout and establish settings for your display.

Column Menu

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.) Using either **Insert** link opens the **New Column** dialog box allowing you to choose up to three fields for your new column.

	BegControl DocType Fileext	Author Custodian Numattachments	Snippets	Confidential Issue DocDate	Comment Hasredactions Privileged
1	BegControl : MAT00001937 DocType : Unknown File Type Fileext : .unknown	Author : Custodian : Mark Taylor Numattachments :	Confidential : Issue : DocDate : 2008-10-31	Comment : Hasredactions : Privileged : Personal/Non-work	
2	BegControl : MAT00001938 DocType : Unknown File Type Fileext : .unknown	Author : Custodian : Mark Taylor Numattachments :	Confidential : Issue : DocDate : 2010-10-31	Comment : Cory Hasredactions : Privileged : Privileged	
3	BegControl : MAT00001939 DocType : Unknown File Type Fileext : .unknown	Author : Custodian : Mark Taylor Numattachments :	Confidential : Issue : DocDate : 2010-10-31	Comment : FloridaTest Hasredactions : Privileged : Personal/Non-work	

Continue to add columns in this way as necessary.

To change the fields that appear in a column, click **Edit Column** in the **Column** menu

The **Edit Column** dialog box works like the **Add Column** dialog box.

Edit Column ✕

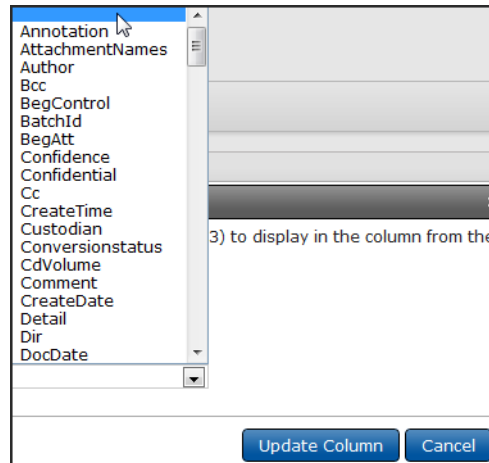
Choose the fields (up to 3) to display in the column from the items below.

Fileext

Numattachments

DocId

If you'd like to remove just one field in a column at a time, select the null value in the drop-down menu. It is the first entry:



You can delete an entire column using **Delete Column** in the **Column** menu and fit the contents to the column width for this column or all your columns.

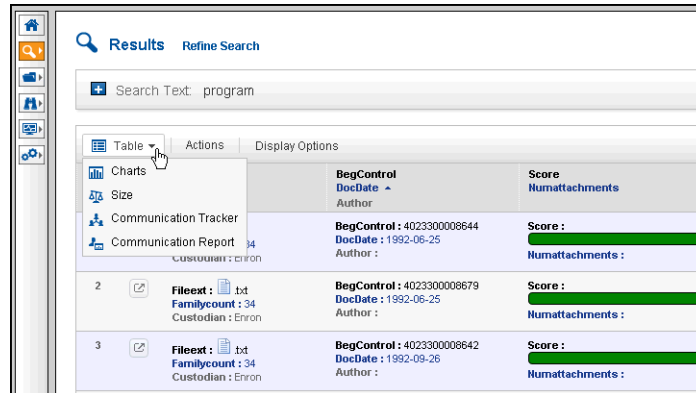
Reorder Columns

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.

Confidential	Author	Comment
Issue DocDate	Custodian Numattachments	Hasredactions Privileged
Confidential : Issue : Compensation DocDate : 2008-10-31	Author : Custodian : Mark Taylor Numattachments :	Comment : Hasredactions : Privileged : Personal/Non-work
Confidential : Issue : Fraud; Contract Dispute; Damages: Compensation DocDate : 2010-10-31	Author : Custodian : Mark Taylor Numattachments :	Comment : Cory Hasredactions : Privileged : Privileged

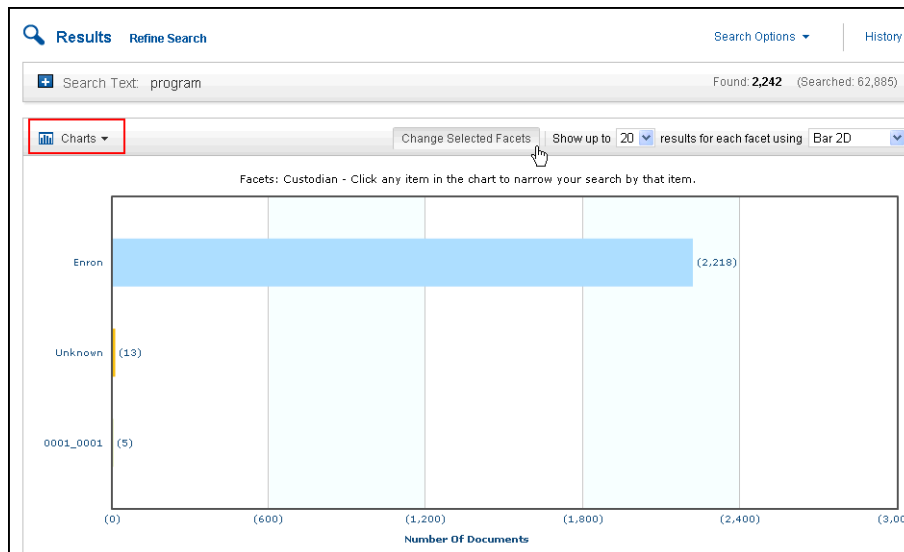
Other Results Options—Graphing and Charting Results

You can quickly view other information about your results set using the **Other Results Options** menu. Expand it to see the options, which allow you to graph file sizes, track communications and view information about the results.



Charts

The **Charts** feature graphs your results by number of documents by faceted fields. Select the **Charts** option in the **Other Results Options** menu.

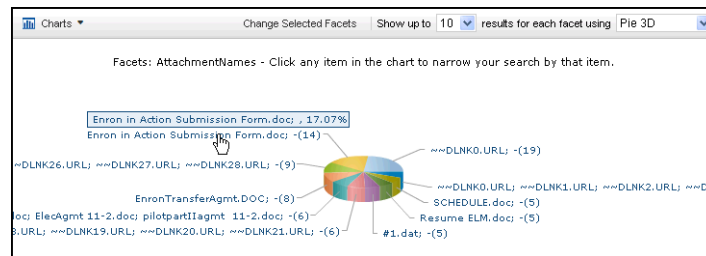


Select the fields by clicking **Change Selected Facet** and using the checkbox or boxes to develop the chart using your select faceted fields. You can change the number displayed or the type of chart using the menus (above image).

Charts—Right-Click Menu

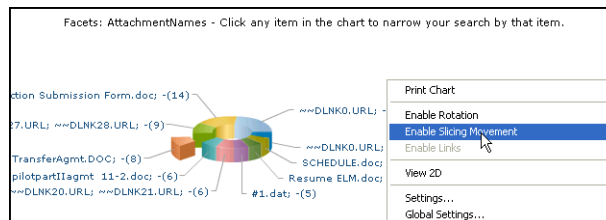
When working with charts in Insight, you can right-click in the chart to open a menu which allows you to print the chart.

Enable Links is the default setting. This allows you to click any of the links and bring back those documents in the **Results** page **Table** view.



Doughnut and Pie charts can be rotated. Right-click in the chart and select **Enable Rotation**. Then drag the chart to rotate it. This can be useful when you are trying to display the categories more clearly.

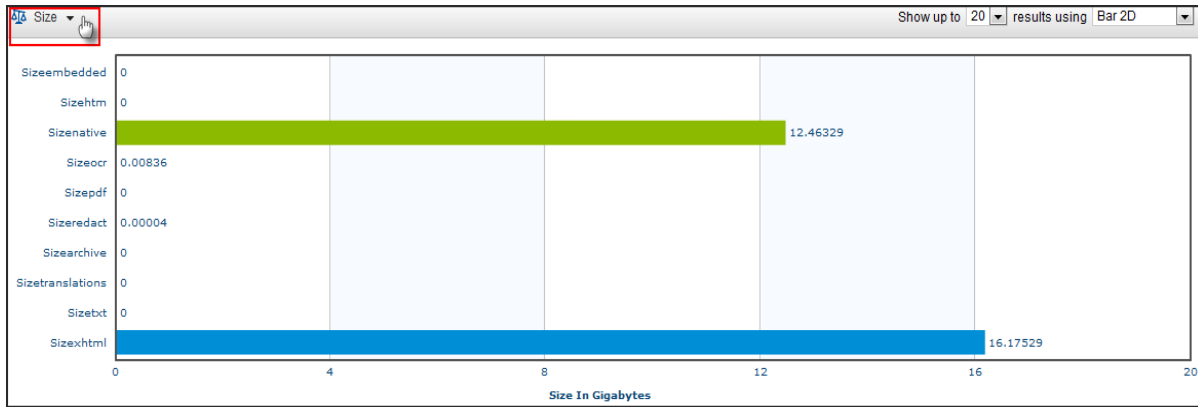
You can also separate the sections by selecting **Enable Slicing Movement**. You can also right-click in the chart to undo your selections or to change from 3D to 2D.



File Sizes

To graph the total sizes of the files of your results, select the **Size** option in the **Other Results Options** menu.

The report is broken down by file types, for example, Text, Embedded, HTM, Native, OCR, and it graphs the file sizes for the different file types in bytes.



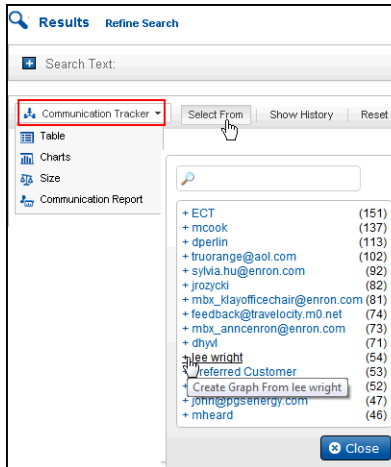
You can change the number of file types displayed or the type of chart using the menus. To print just the chart and not the entire Web page, right-click in the chart and select **Print** or **Print Chart**.

If you chose to use a **Doughnut** or **Pie** chart, you can right-click in the chart and select to slice or rotate the chart.

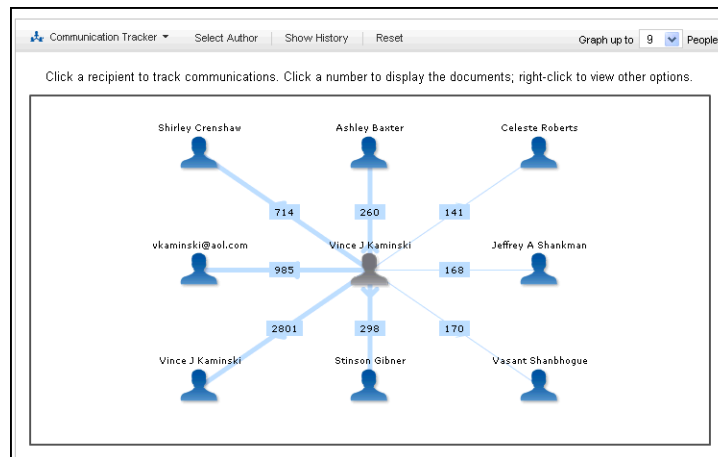
Communication Tracker

Communication Tracker allows you to explore documents that are authored by a particular person. You can see the names or emails of the people who make up the communications in a diagram. Then you can quickly go to those documents. This visual representation is a good way to explore communications between key people. The **Communication Tracker** is made up of several fields. The list of Authors is made up of the **Author** and **From** fields. The Recipients listed in your graph contain data from the **To**, **Recipient** and **CC** fields.

Select **Communication Tracker** from the **Other Results Options** menu.



Select the name from the list or start typing the name into the text box to find it. The names appear with a number in parentheses to show you how many documents are to that particular person. Select the number of people to graph using **Graph up to # People**. The default is **9** but you can select a higher or lower number. This number includes the person you've chosen to track.



The top recipients (people the communications went to) are located around your selected sender. The number in the line box is the number of records to that person. Click that number to bring back the records in the **Results** page.

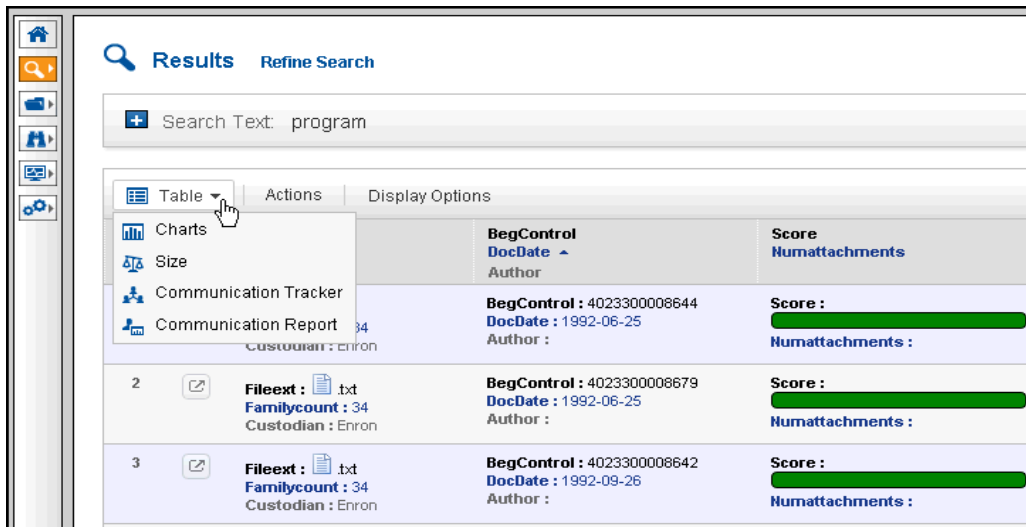
Click a recipient to see the communications from that person. This will put the recipient's name in the center of the diagram and then show the communications from that person to others.

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

Click **Reset** to clear the display and create an entirely new search.

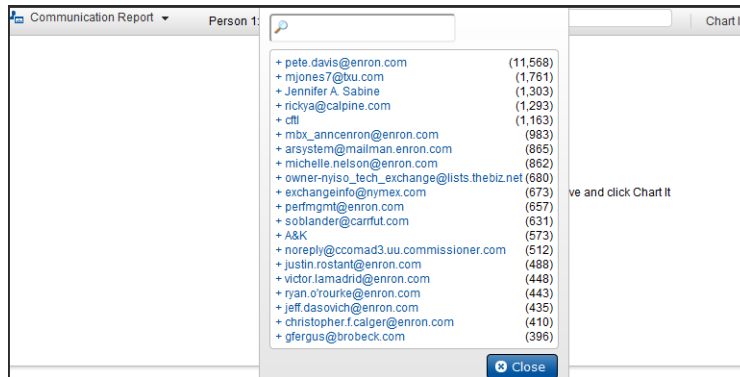
Communication Report

Quickly access and analyze communications between two people by clicking **Communication Report** in the **Other Results Options** menu.

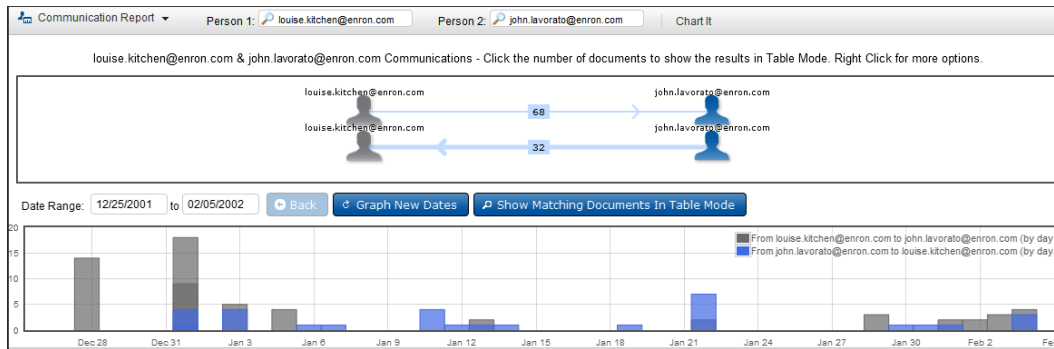


The screenshot shows the Catalyst search results interface. At the top, there is a search bar with the text 'program'. Below the search bar, there are tabs for 'Table', 'Actions', and 'Display Options'. The 'Table' tab is selected, and a dropdown menu is open, showing options: 'Charts', 'Size', 'Communication Tracker', and 'Communication Report'. The 'Communication Report' option is highlighted. Below the menu, there is a table of search results. The table has columns for 'Fileext', 'Familycount', 'Custodian', 'BegControl', 'DocDate', 'Author', 'Score', and 'Numattachments'. The first row shows a document with 'Fileext: .txt', 'Familycount: 34', 'Custodian: Enron', 'BegControl: 4023300008644', 'DocDate: 1992-06-25', 'Author:', 'Score:', and 'Numattachments:'. The second row shows a document with 'Fileext: .txt', 'Familycount: 34', 'Custodian: Enron', 'BegControl: 4023300008679', 'DocDate: 1992-06-25', 'Author:', 'Score:', and 'Numattachments:'. The third row shows a document with 'Fileext: .txt', 'Familycount: 34', 'Custodian: Enron', 'BegControl: 4023300008642', 'DocDate: 1992-09-26', 'Author:', 'Score:', and 'Numattachments:'.

Expand the **Person 1** and **Person 2** menus to find the people whose communications you want to explore.

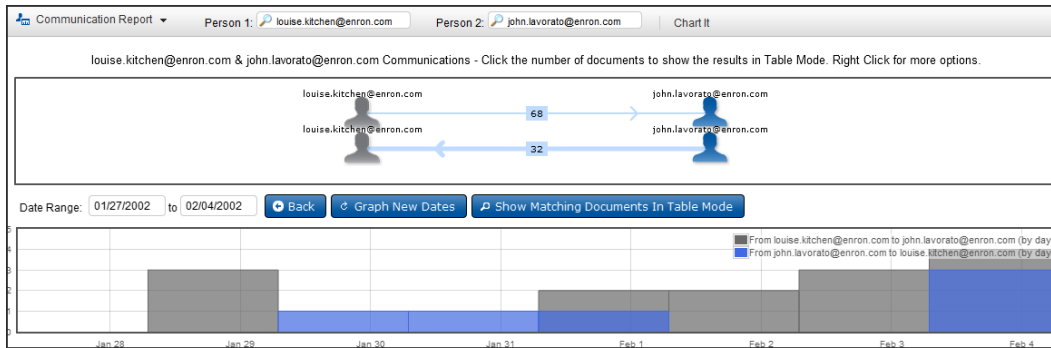


Then click **Graph It**.



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.

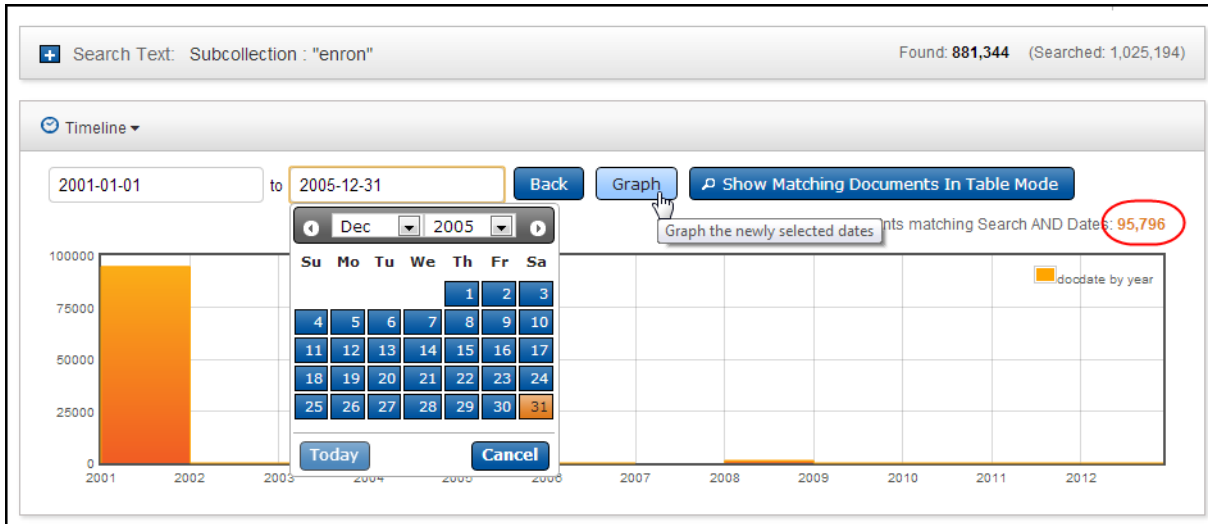


You can display the documents based on the new dates by selecting the **Show Matching Documents in Table Mode** button.

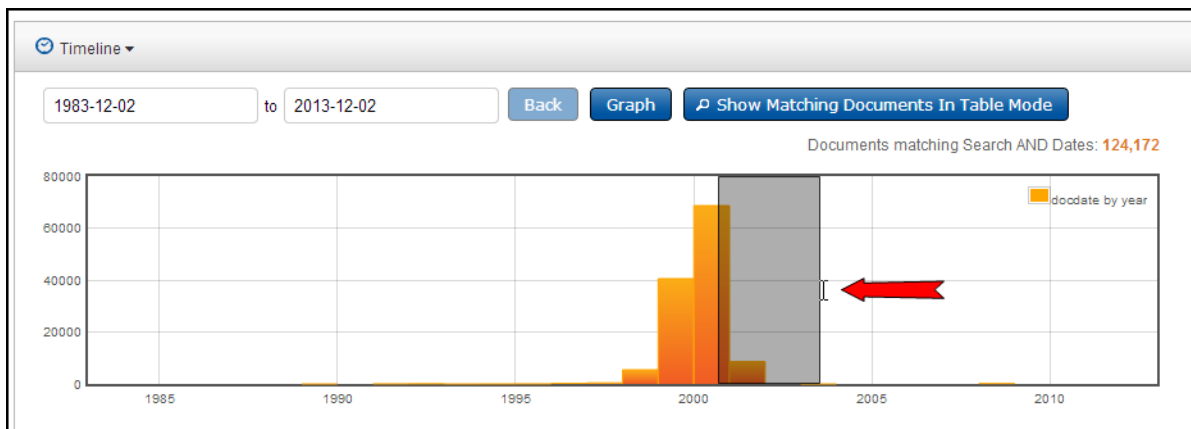
If at any time you want to change either the **Person 1** or **Person 2** values, click the name and select a different one. Then select **Chart It** to see the new results.

Timeline

Results can be graphed by dates with the **Results** page **Timeline**. In the **Results** page, expand the **Options** menu and click **Timeline**. This gives you a look at the document dates of your search results. You can change the date range by expanding the **Date** menus and selecting different dates. Clicking **Graph** then updates to your new range and updates the number of documents that will be returned based upon the new criteria.



To use your pointer to narrow in on date ranges, drag the bar to your chosen width.



The graph will update automatically.



Click **Back** to go back to the previous graph. You can also display the documents for that search in the specified date range by clicking **Show Matching Documents in Table Mode**.

Results Page Search Text

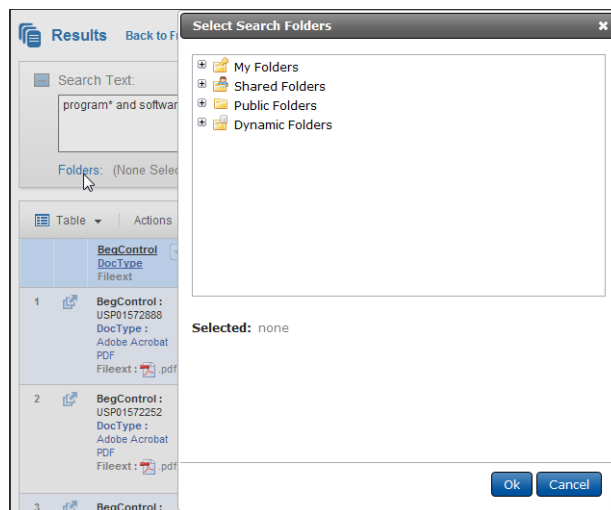
If you've reached the **Results** page by running a search, the **Results** page allows you to view and change the search without going back to the **Search** page. Your search will be populated in the **Search Text** field on the **Results** page. If you've opened a folder to access your results, the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

FileExtension	DocId	HotDoc Issues Privileged	Comments	ReviewStatus Subcollection
.msg	17285		test	general
.msg	20138		test	general
.msg	16539		test	general

Click the **Search** button or press the ENTER key on your keyboard to execute your search and bring back new results.

You can also change or limit your search query to a folder or folders. Click the **Folders** link to open the **Saved Search Folders** dialog box, which allows you to select a folder to search.



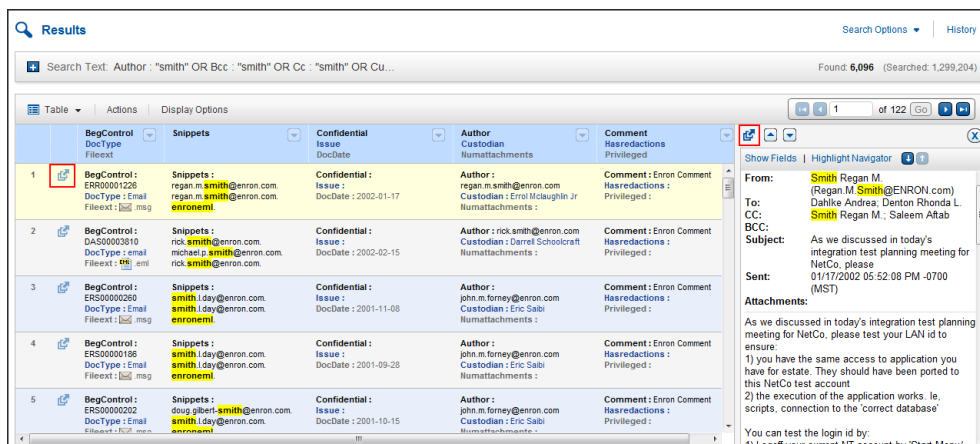
You can also change your settings or collections.

Documents, Forms and Fields

Whether you've run a valid search or opened a **Dynamic** or **Static Folder** or you are working in the **Review Projects** module, you will access your documents in the **Results** page at the **Table** view.

The **Preview** mode is enabled in the **Results** page in the below example. Clicking in the document row displays a preview of the document on the right. You can scroll through the entire document viewing it in this **Preview** mode and navigate and view other documents using the **Preview** by clicking the **Up** and **Down Arrow** buttons.

To review the complete record—document text and fielded information—click the **Launch Document** button located in the first column of the document row. This opens the document in a new Web page, which allows you to work in the document and navigate to other documents in your **Results** set directly through this new page. When **Preview** is available, you can also click the **Launch Document** button in the **Preview** pane.



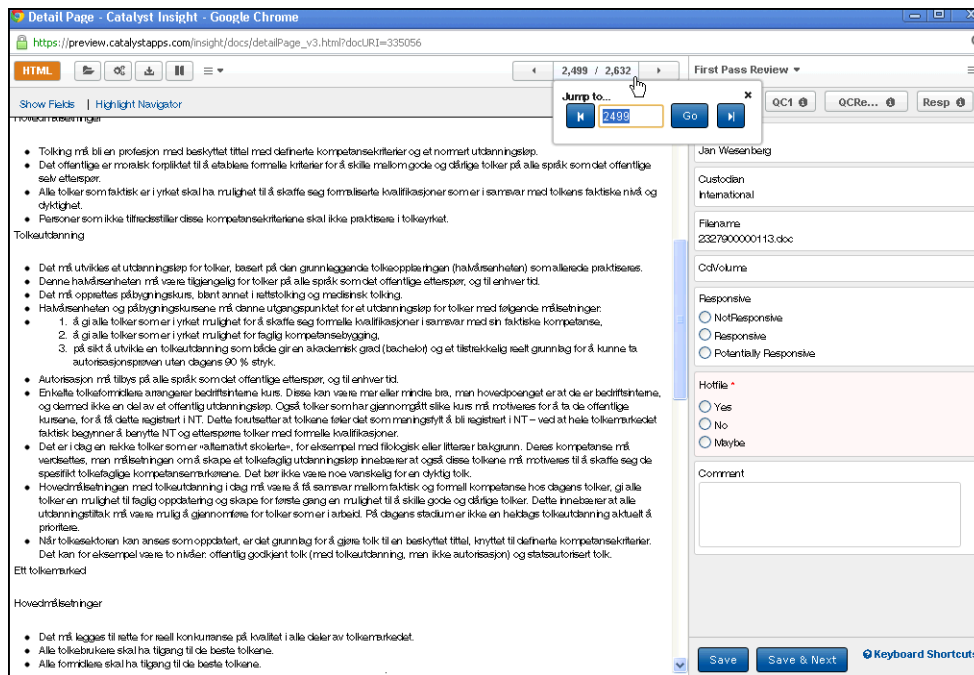
The screenshot shows the Catalyst Results interface. At the top, there is a search bar with the text "Search Text: Author: 'smith' OR Bcc: 'Smith' OR Cc: 'Smith' OR CU..." and a "Found: 6,096 (Searched: 1,299,204)" indicator. Below the search bar is a table with columns: "BcgControl", "Snippets", "Confidential", "Author", and "Comment". The table contains five rows of document entries. The first row is selected, and its details are shown in the preview pane on the right. The preview pane includes fields for "From:", "To:", "CC:", "BCC:", "Subject:", and "Sent:". The "Subject" field contains the text: "As we discussed in today's integration test planning meeting for NetCo, please 01/17/2002 05:52:08 PM -0700 (MST)".

BcgControl	Snippets	Confidential	Author	Comment
ERR00001226 DocType: Email Fileext: .msg	regan.m.smith@enron.com. regan.m.smith@enron.com. enroneml	Issue: DocDate: 2002-01-17	regan.m.smith@enron.com Custodian: Eric Housheer, Jr Numattachments: 1	Enron Comment Hasredactions: Privileged:
DA500003810 DocType: email Fileext: .eml	rick.smith@enron.com. michael.p.smith@enron.com. rick.smith@enron.com.	Issue: DocDate: 2002-02-15	rick.smith@enron.com Custodian: Darrel Schoolcraft Numattachments: 1	Enron Comment Hasredactions: Privileged:
ERS00000260 DocType: Email Fileext: .msg	smith.l.day@enron.com. smith.l.day@enron.com. enroneml	Issue: DocDate: 2001-11-08	john.m.forney@enron.com Custodian: Eric Saibi Numattachments: 1	Enron Comment Hasredactions: Privileged:
ERS00000166 DocType: Email Fileext: .msg	smith.l.day@enron.com. smith.l.day@enron.com. enroneml	Issue: DocDate: 2001-09-28	john.m.forney@enron.com Custodian: Eric Saibi Numattachments: 1	Enron Comment Hasredactions: Privileged:
ERS00000202 DocType: Email Fileext: .msg	doug.gilbert-smith@enron.com. smith.l.day@enron.com. enroneml	Issue: DocDate: 2001-10-15	john.m.forney@enron.com Custodian: Eric Saibi Numattachments: 1	Enron Comment Hasredactions: Privileged:

Document Interface

In an opened document, the body of the document is displayed in the left frame, and the document form, containing the coding and metadata fields, is at the right.

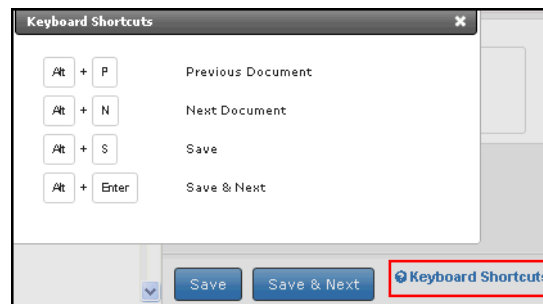
Use the navigation buttons at the top right of the document frame to page to the next or previous record. Click the **XX/XX** area to open the **Jump to** menu. Enter a specific number and click **Go** to open that record.



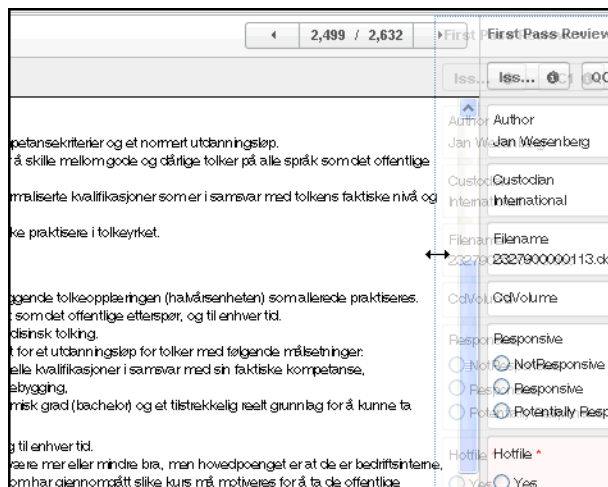
Every record has a quick-loading HTML preview of the content of the record. The button to display this preview may be named **HTML**, **Text** or **Preview** on your site—for documentation purposes, this button will be referred to as **HTML** henceforth. The **Show Fields** link is available in the preview of your document. Clicking the **Show Fields** link displays the file’s metadata information in the document pane. The fields will display in each record you open until you click **Hide Fields**, as this is a sticky setting.

Apply coding changes to appropriate fields in the form, and use **Save** or **Save & Next** to capture your changes. **Save & Next** will save the record you are in and move you to the next record in the **Results** set.

If you prefer to use your keyboard, there are also some shortcuts built in for navigating through your documents and saving the record you are viewing using keys rather than your mouse. Click **Keyboard Shortcuts** to see Insight's built-in shortcut keys.



To enlarge or narrow the form, point to the split line. When the pointer becomes a double-headed arrow, drag the pointer to move the split line.

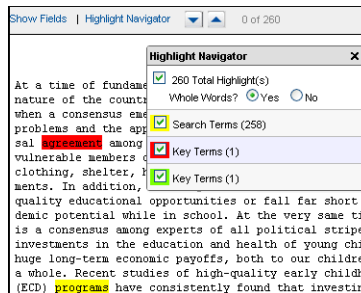


Highlights

Insight displays search hit highlighting (Search Terms) and static highlighting (Key Terms). If you search the text of the documents, the search terms will be highlighted in the document when you are viewing the HTML preview of the record. If you've searched the metadata, such as **Anytext** or the **DocType** field, highlighting will show up in the metadata information when you click **Show**

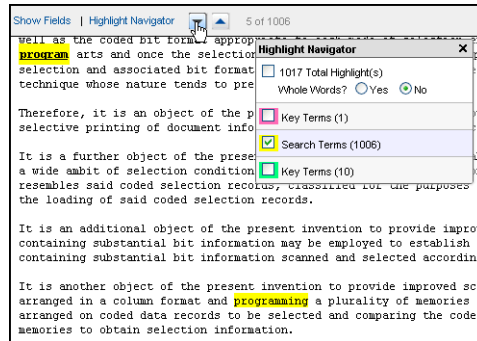
Fields in the HTML view. In addition to search hit highlights, your site administrator may designate certain words to be highlighted each time these words appear in documents on your site. These highlighted words or phrases are also viewable in the HTML preview of the record.

Click the **Highlight Navigator** link to open the **Highlight Navigator** dialog box. If the document contains both search hits and static hits, the **Highlight Navigator** shows you the number of each and allows you to display and navigate to just the search terms or the key terms hits or all the hits using the checkboxes.



The **Highlight Navigator** includes an option for highlighting exact characters or entire words. It is initially defaulted to the **Yes** option at **Whole Words?**. When the **Yes** option is chosen, only complete words are highlighted. (Complete words are surrounded by at least one space on either side.) For example, if a search were run for the word *program*, only that word would be highlighted. Changing the option to **No** causes the letters *program* to be highlighted wherever they appear, so this may include *programs*, *programmable*, *programming*, as well as *program*.

This is particularly useful in CJK-language documents, where the same glyph can be used as part of multiple words/phrases.



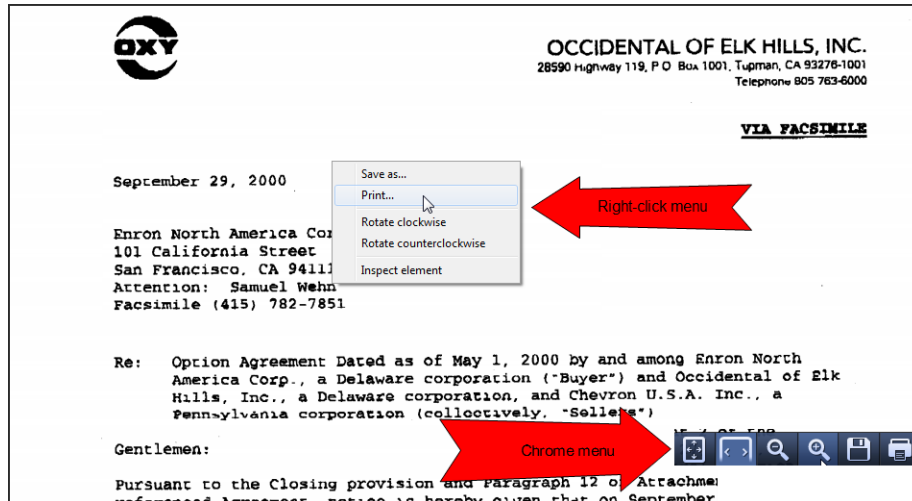
Click the **Up** or **Down Arrow** buttons next to the **Highlight Navigator** to scroll to the next or previous highlighted term. Remember that to see the highlights and use the navigator, you must be in the HTML view of the record.

Viewing PDFs

When you open an Insight record that was uploaded into Insight as a PDF file, the **PDF** button and an **HTML** button are available. If you or another user has converted a native file to PDF within Insight, the **PDF** button will be available in this record as well.

The text of the document appears in the **PDF** view. If you click the **HTML** button, you will see the HTML preview of the document text.

If you are using the Chrome browser with the default Chrome PDF Viewer to display PDFs, you will not have the full Adobe functionality. To access the **Chrome Viewer** menu, point to the bottom right of the document. These buttons will allow you to enlarge, minimize, zoom in or out, save a copy of the document to your computer and print the document (send it to your local or network printer). You can also right-click in the document to save, print and rotate the document. When using the Chrome PDF Viewer to display a PDF document, you must use the right-click menu in order to rotate.

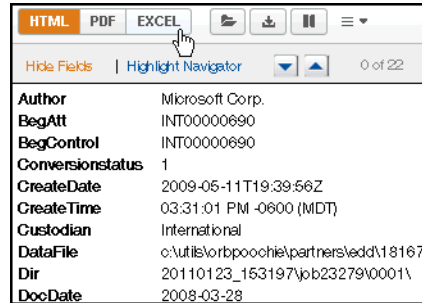


If you prefer to use Adobe Reader because of its increased functionality, you can set this as your default viewer in Chrome. Most other browsers also work well with Adobe Reader for viewing PDFs in Insight. Please refer to the [Insight Quick Start Guide](#) for more information.

Viewing Native Files

If your site contains documents that were uploaded in their native file formats, opening a native file will display it in the fast-opening HTML view, which provides a good representation of the native file and automatically displays any highlights of search hits or terms chosen for persistent/static highlighting. The HTML view is especially useful if you don't have the native application loaded to your computer. For example, you may be working in the site on a computer that does not have MS Office loaded. While Word and Excel documents are uploaded in their native format, all Power Point documents are converted to PDFs upon ingestion into the system. When the PDF is placed onto Insight, the document text is extracted from the PDF. The HTML view is available for all file types, including native files, OCR'd TIFFs and PDFs.

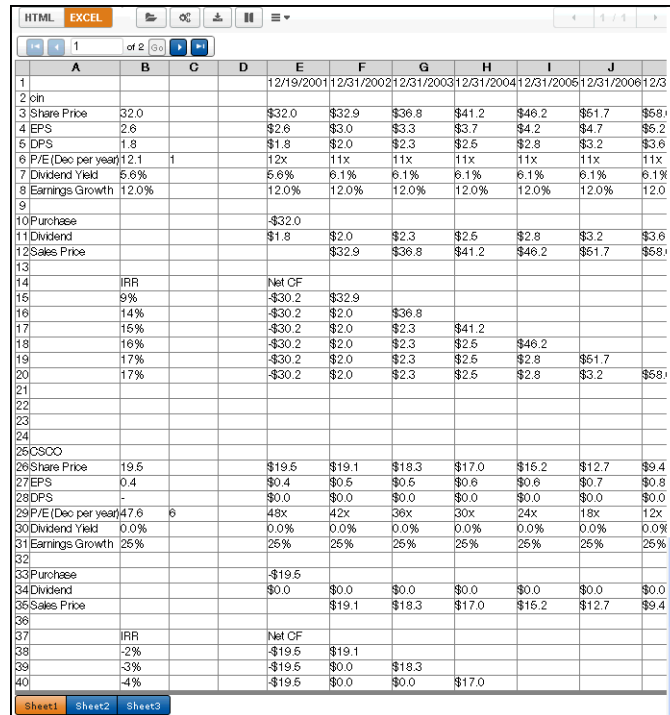
Excel records have an **Excel** button to display the Excel view in addition to the HTML view. If a PDF version of a native record has been created on the fly, the **PDF** button will also be available.



While the HTML viewer displays the preview of the body content of the file, there may be reviewer comments and track changes in Word that can only be viewed by downloading and viewing the record in Word. The Excel view 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 40 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).

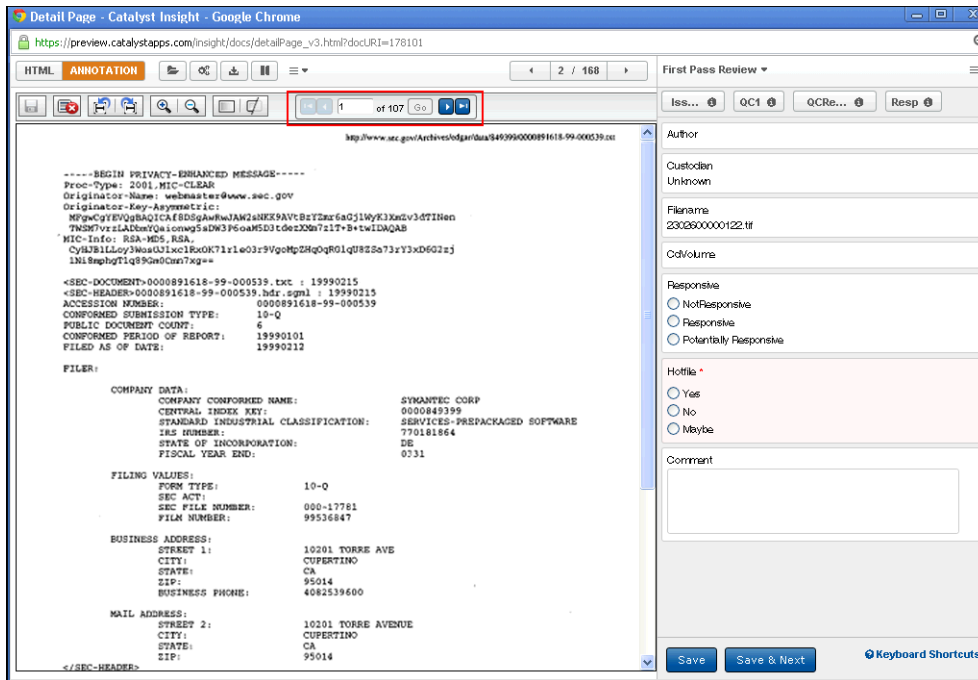


	A	B	C	D	E	F	G	H	I	J
					12/31/2001	12/31/2002	12/31/2003	12/31/2004	12/31/2005	12/31/2006
3	Share Price	32.0			\$32.0	\$32.9	\$36.8	\$41.2	\$46.2	\$51.7
4	EPS	2.6			\$2.6	\$3.0	\$3.3	\$3.7	\$4.2	\$4.7
5	DPS	1.8			\$1.8	\$2.0	\$2.3	\$2.5	\$2.8	\$3.2
6	P/E (Dec per year)	12.1	1		12x	11x	11x	11x	11x	11x
7	Dividend Yield	5.6%			5.6%	6.1%	6.1%	6.1%	6.1%	6.1%
8	Earnings Growth	12.0%			12.0%	12.0%	12.0%	12.0%	12.0%	12.0%
10	Purchase				-\$32.0					
11	Dividend				\$1.8	\$2.0	\$2.3	\$2.5	\$2.8	\$3.2
12	Sales Price					\$32.9	\$36.8	\$41.2	\$46.2	\$51.7
14	IRR				Net CF					
15	9%				-\$30.2	\$32.9				
16	14%				-\$30.2	\$2.0	\$36.8			
17	15%				-\$30.2	\$2.0	\$2.3	\$41.2		
18	16%				-\$30.2	\$2.0	\$2.3	\$2.5	\$46.2	
19	17%				-\$30.2	\$2.0	\$2.3	\$2.5	\$2.8	\$51.7
20	17%				-\$30.2	\$2.0	\$2.3	\$2.5	\$2.8	\$3.2
26	Share Price	19.6			\$19.6	\$19.1	\$18.3	\$17.0	\$16.2	\$12.7
27	EPS	0.4			\$0.4	\$0.5	\$0.5	\$0.6	\$0.6	\$0.7
28	DPS	-			\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
29	P/E (Dec per year)	47.6	6		48x	42x	36x	30x	24x	18x
30	Dividend Yield	0.0%			0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
31	Earnings Growth	25%			25%	25%	25%	25%	25%	25%
33	Purchase				-\$19.5					
34	Dividend				\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
35	Sales Price					\$19.1	\$18.3	\$17.0	\$16.2	\$12.7
37	IRR				Net CF					
38	-2%				-\$19.5	\$19.1				
39	-3%				-\$19.5	\$0.0	\$18.3			
40	-4%				-\$19.5	\$0.0	\$0.0	\$17.0		

To view the metadata information about the Excel file or any highlights, click the **HTML** button.

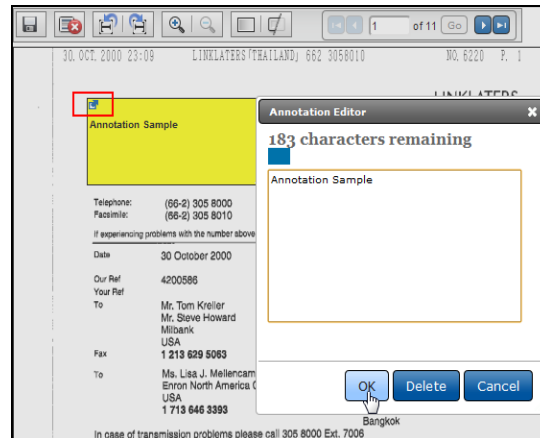
Viewing TIFF Records

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 **HTML** 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.

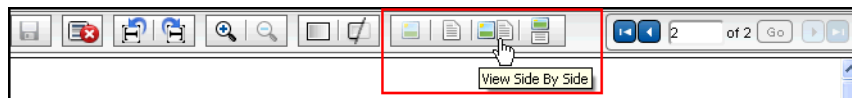
Moving to the right, the **Delete** button removes all the annotations in the page you are currently viewing (it doesn't remove annotations from other pages).

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.

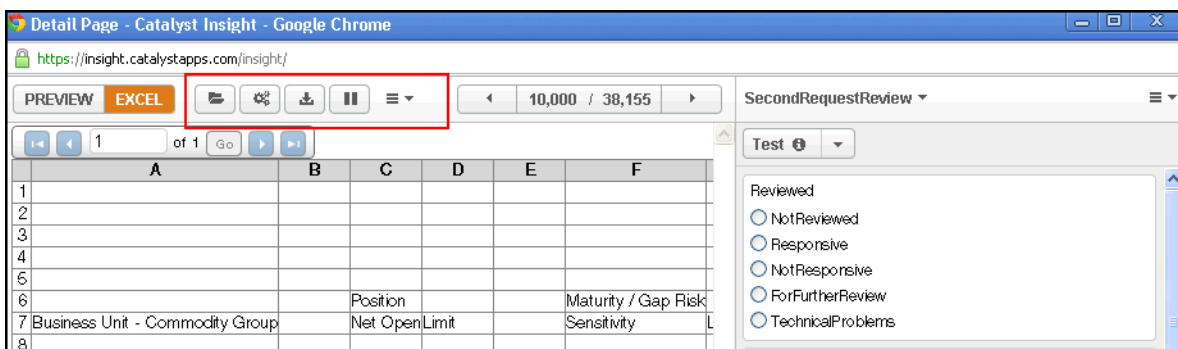
Click the **Toggle Annotation Visibility** to view the record without the annotations showing. This doesn't remove the annotations; it makes them invisible. Click the button again to display the annotations.

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.

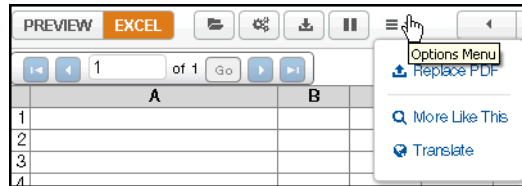


Document Options

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**.

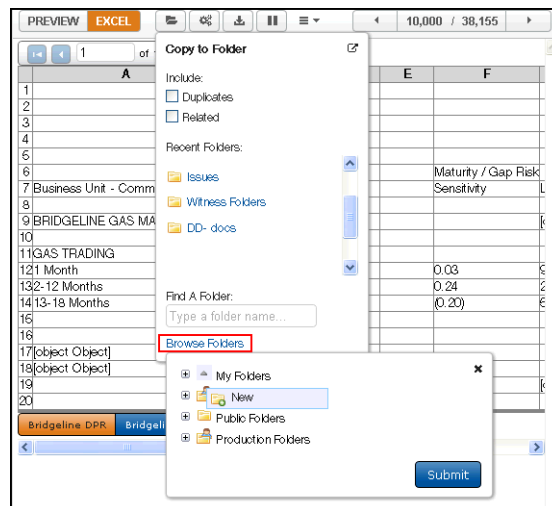


The **Options** menu also contains commands. These can include **Redact**, **Replace PDF**, **More Like This** and **Translate**.

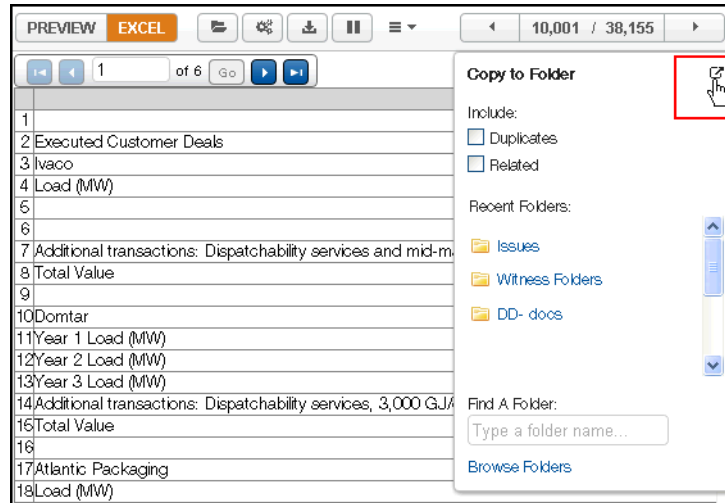


Copy a Document to a Folder

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 at the **Wrench**, 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 to this position across documents until you undock and move it again. Click the **Undock** button and then move the pod to a convenient place.



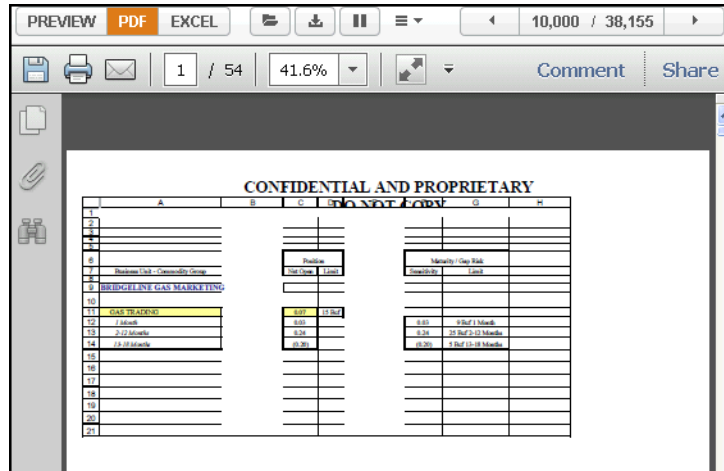
Convert to PDF

You may want to create a PDF version of the record you are in, and Insight allows conversion to PDF on the fly if a PDF version of the record doesn't yet exist. 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**.

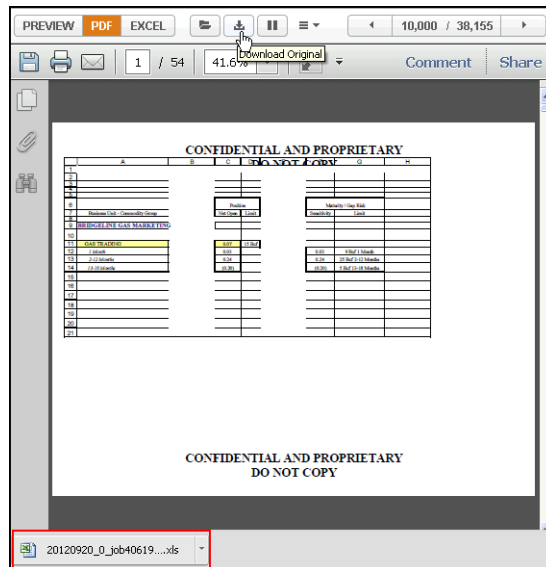


Once the PDF is ready, a **PDF** button is available, and the record can be viewed in the PDF format. If you have rights to redact, the **Redact** link is available in the **Options** menu. The **Convert to PDF** button is no longer available.



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.)



The best practice when determining whether to download and open a document to review in its native format is to look at the preview in the Results page or in the HTML Preview display of the opened record and then determine whether it would be helpful to analyze the file in its native format.

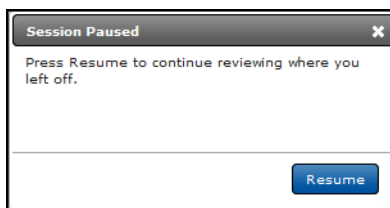
Common native files are typically processed to include comments and track changes, hidden rows and columns. Certain information can only be viewed by opening the record in its native application, such as the formulas used to populate a cell in Excel.

Pause Review

To pause the timer tracking your time spent reviewing a document, click the **Pause Review** button.

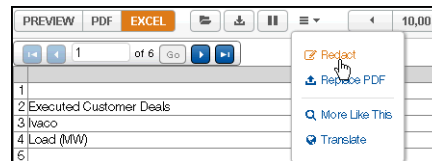


After pausing a review, you will not be able to see your document again until you resume the session by clicking the **Resume** button in the **Session Paused** dialog box. The timer starts logging your time spent in review again.



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.

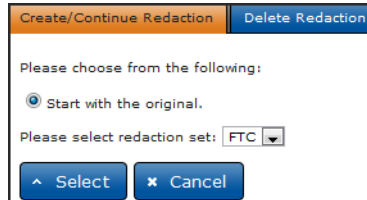
Click the **Redact** link to open the redaction module.

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.

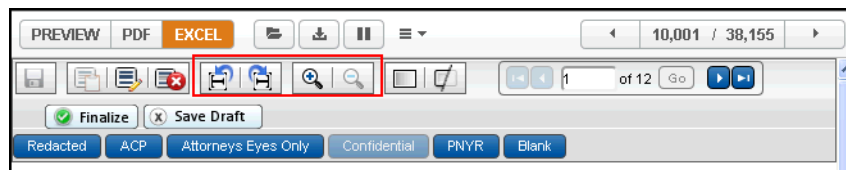
To create or continue a redacted version, click the **Redact** link in the **Options** menu, and in the **Create/Continue Redaction** dialog box, select whether to start with the original document, or if a document already has a saved redacted version, you can make changes to this version.

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.



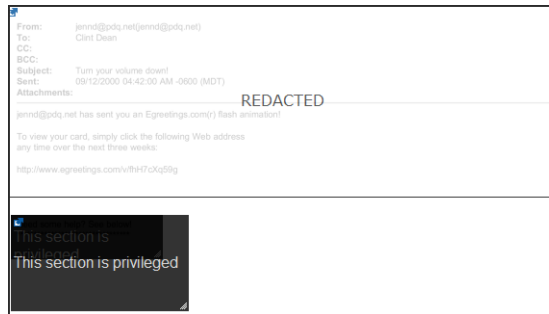
Using Redaction Buttons

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 blank redaction 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.



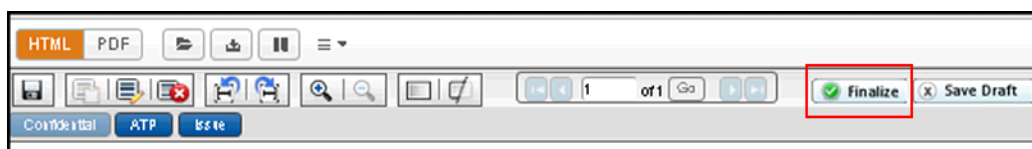
You can change the size of the redaction box by dragging the corners or the sides with your pointer.

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 **Finalize**, a redacted version will not be pulled, as the system does not consider an un-finalized saved draft 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

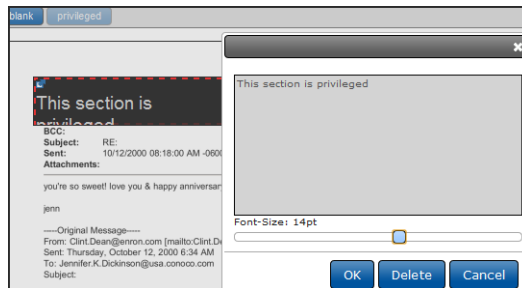
When documents are redacted, we provide a transparent version so you can view the underlying words or images that have been redacted. Use the toggle buttons to switch between the transparent and opaque views. You can also temporarily remove the redaction visibility completely.

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

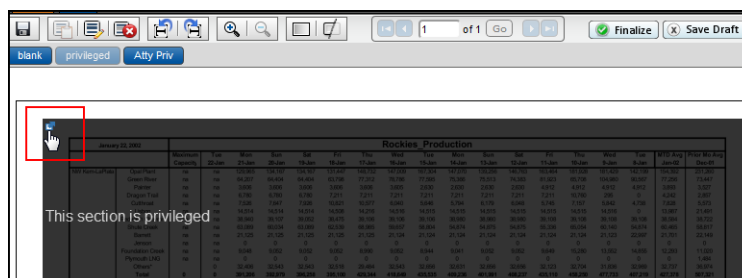
The administrator of your site set up the redaction buttons and entered the text that appears on the redaction box. Redactions vary in size so you may find that adjusting the text within the box to a larger or smaller size is necessary.



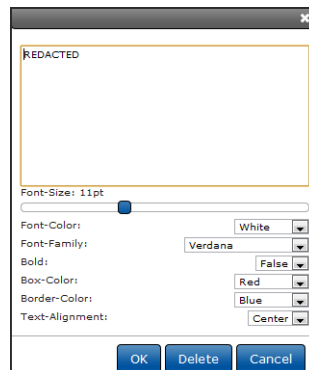
In the above image, the text in the left redaction box is too big for the redaction. Click the menu at the top left of your redaction box to resize the text. Just drag the **Font-size** bar to the left to make the font smaller. Drag it right to make it bigger.

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).

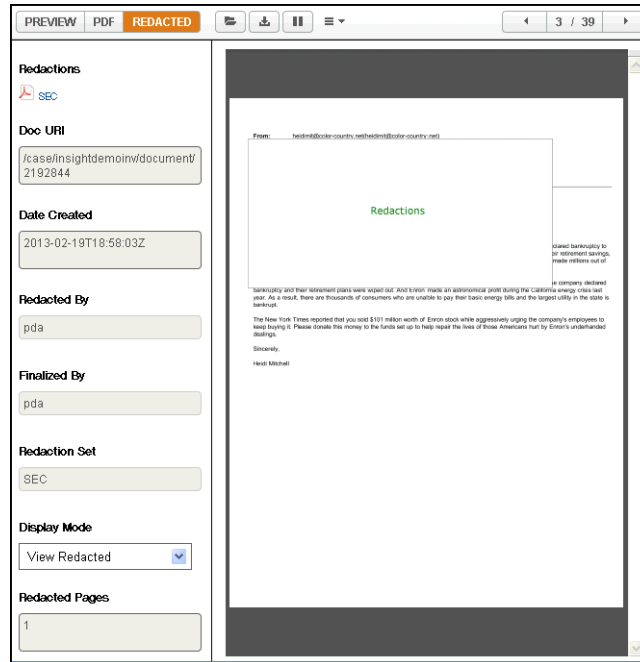


Color Redactions

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**.



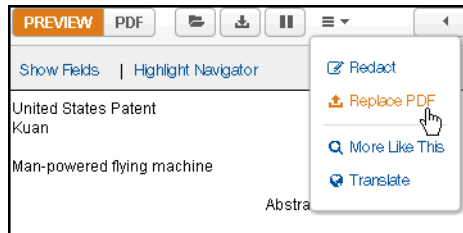
You can view the transparent version of the document by selecting **Transparent** from the **Display Mode** in the right pane of the redacted document. If you want to make changes to the redacted document, expand the **Options** menu and click the **Redact** link.

Upload PDF

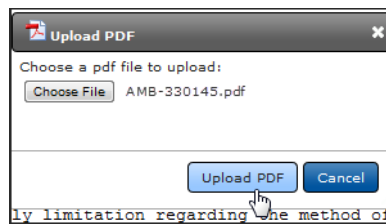
You may have permissions to upload a new PDF version of the record you are in. For example, perhaps the original file is an Excel spreadsheet, and the record was converted to PDF in the Insight system but is not formatted properly. If you have permissions to do so, you can create and upload a new PDF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



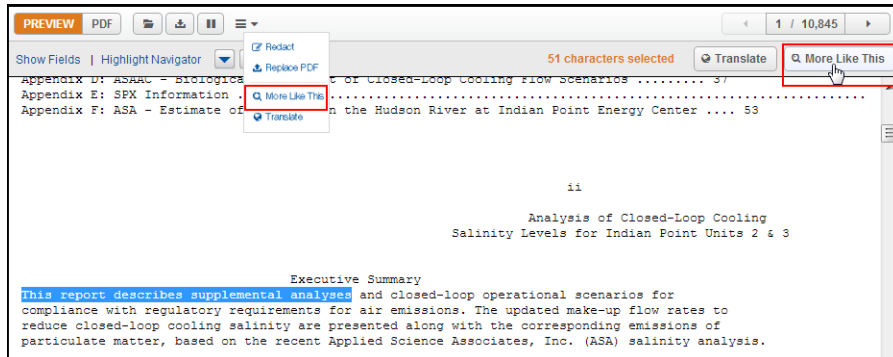
When the upload is complete, you can view the PDF by clicking the **PDF** button.

More Like This

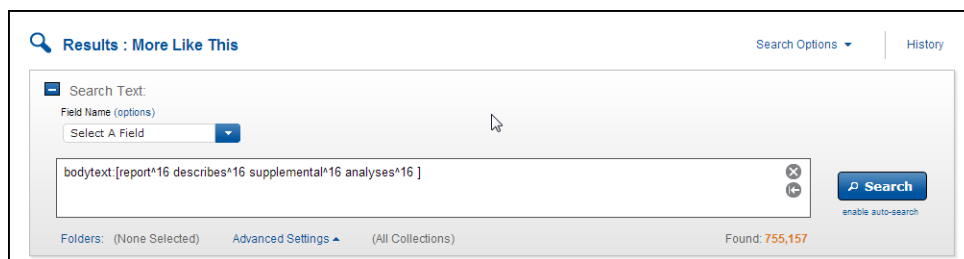
Insight searching includes the **More Like This** functionality, which provides the ability to find documents similar to the document being reviewed. This allows you to quickly isolate documents with similar content and themes.

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**.

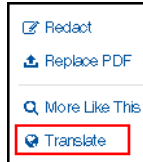


Translate

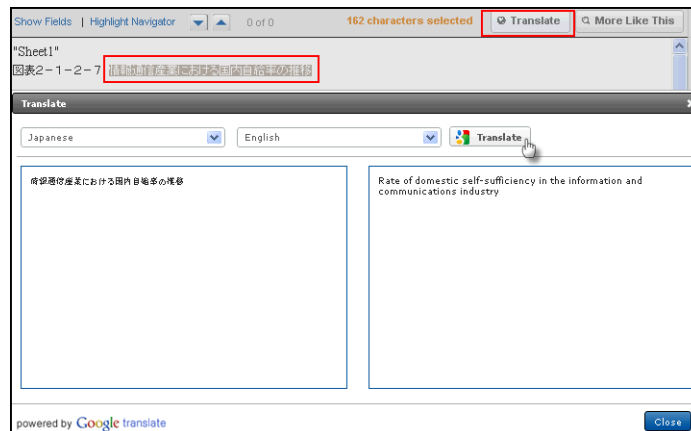
You may have permission to can select and translate sections of document text “on the fly” while working within the record. This is a quick way to understand the overall content of a foreign-language document.

When reviewing documents that contain foreign words or phrases, use your mouse to highlight the text (in the **Results** page preview or the **HTML/Preview** view of the opened record). This enables the **Translate** button at the top right. Click it to open the **Translate** dialog box. You can

also select **Translate** from the **Options** menu to include all the text of your record. (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**.

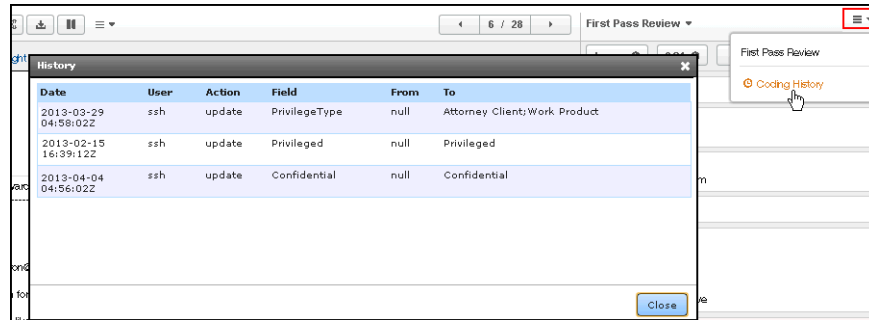


Click **Close** to return to your document.

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**.

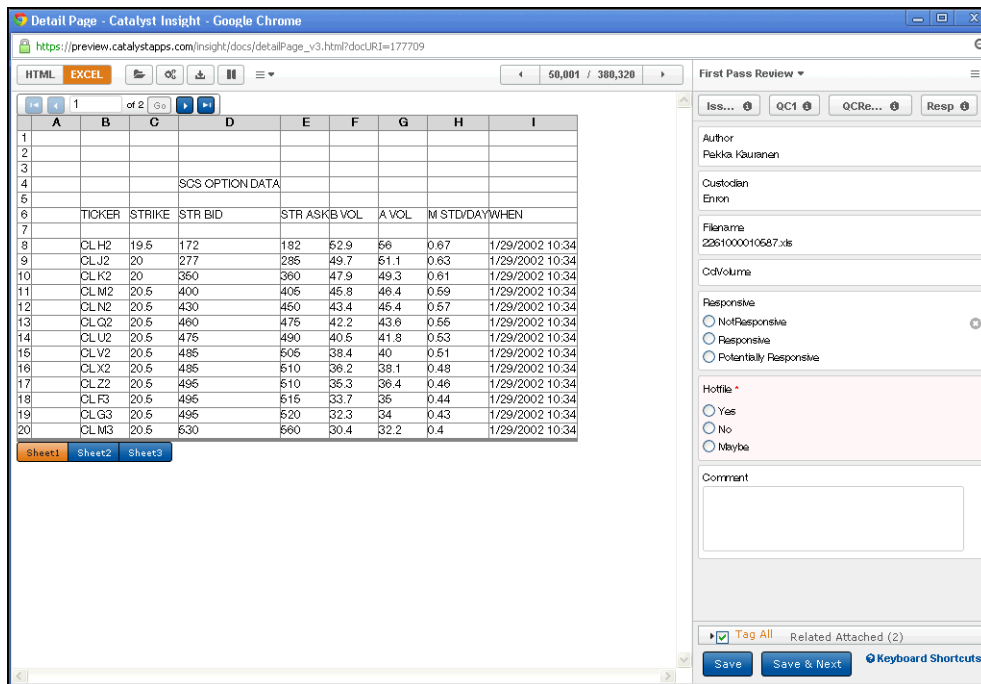
This includes when a document's data in the database was changed, who made the change, and the value or values that were changed. Redaction, bulk updating, conversion and translation information is also available.



Forms

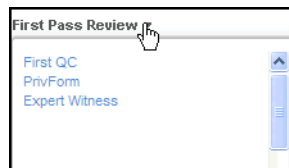
The database field information makes up the document form and is where you apply your coding changes to the document. In an opened record, the form displays to the right of the document text.

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.

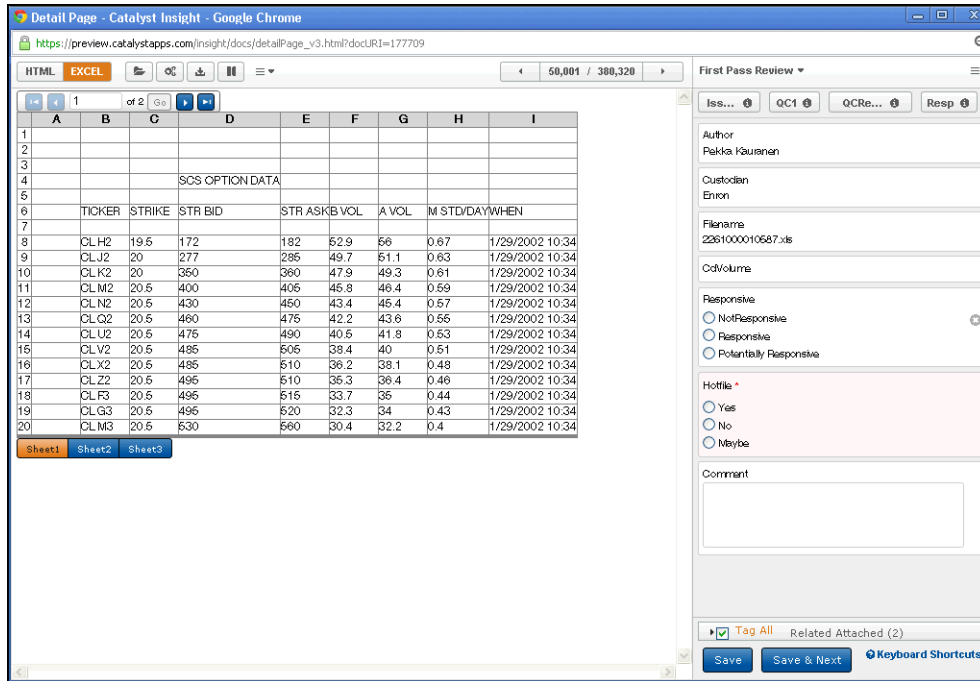


Fields

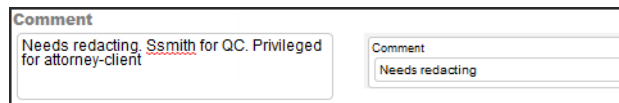
You will make coding changes to editable fields located in a specific **Review** form. These forms may also contain some non-editable label fields, which provide you information about the document.

Author
Recipient
Cc
Bcc
Custodian Mark Taylor

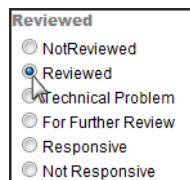
Fields can have properties and rules assigned to them. Fields with a faint red background and an asterisk (*) are required fields. You cannot save the record until you apply values to required fields.



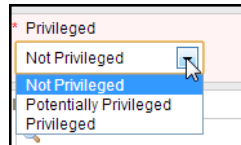
Insight forms may contain several different editable field types. Text fields allow you to add or edit text. These work like standard text boxes and may be limited to short entries or allow longer entries. Type in the box to include information.



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



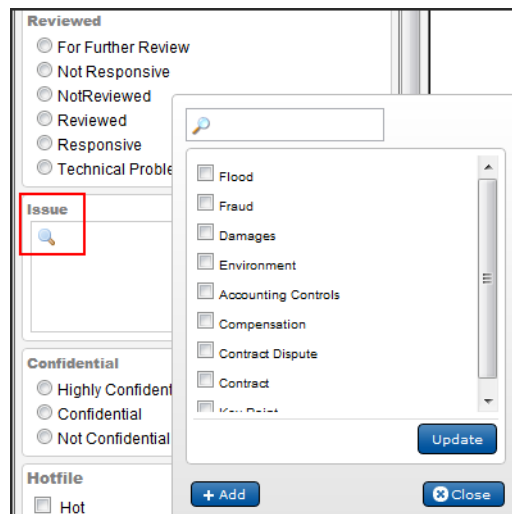
Another field which allows you to choose only one value is the drop-down menu. Expand the menu and highlight your value.



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.

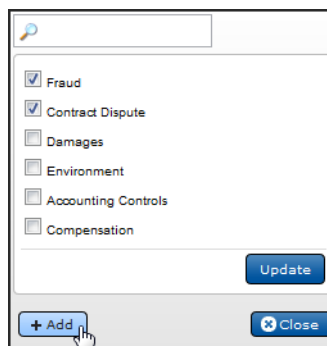


The multi-value lookup field also allows you to make multiple choices. To populate this field, click the **Search** button (magnifying glass).

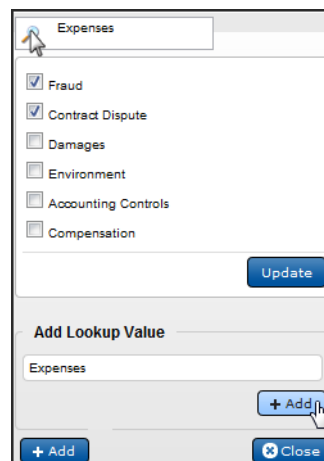


This opens the multi-value table. Find your values and select them using the checkboxes. You can search for a value if this list is large. Type part or all of the word into the **Search** box above the list, and click the **Search** button.

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.



The screenshot shows a rectangular box with the title "Issue" in bold. Below the title is a search icon (magnifying glass) followed by the text "Fraud Expenses".

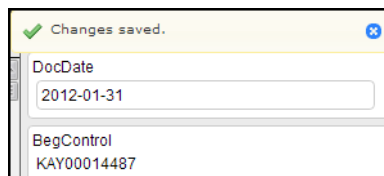
Some fields, such as **Date** fields, may require you to enter information in a particular format. Insight adheres to the International Standards for Organization (ISO)-developed international date format of YYYY-MM-DD. You may receive an error when you enter fielded information in the wrong format and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



The screenshot shows a dialog box with a red header bar containing a warning triangle icon and the text "Error". Below the header, there are two input fields. The first is labeled "DocDate" and contains the text "01-24-2012". The second is labeled "BegControl" and contains the text "KAY00014487".

When you have properly completed a form, clicking **Save** will save the record and leave you in the current record. Click **Save & Next** to save your record and move to the next record in the results.

You will receive a **Success** message if the record form is properly saved:

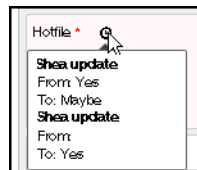


The screenshot shows a dialog box with a green header bar containing a checkmark icon and the text "Changes saved.". Below the header, there are two input fields. The first is labeled "DocDate" and contains the text "2012-01-31". The second is labeled "BegControl" and contains the text "KAY00014487".

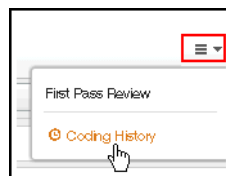
The **Delete (X)** button is available in a field to clear the field of all input. The button appears when you point to a field.



Each field on your form now includes a coding history graphic, which you can view if you are in a Role with rights to see the coding history. This allows you to see what changes have been made to a specific field.



To view a complete audit history of the changes to the record, expand the **Forms Options** menu, and select the **Coding History** link.



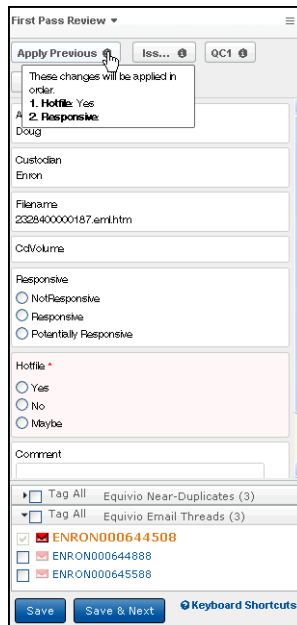
Shortcuts and Rules

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

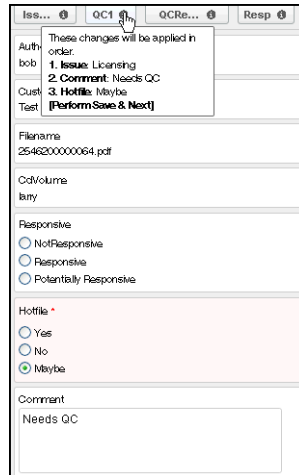
The **Apply Previous** command is a user-permission that enables you to code a record with the same coding as the last record you saved. This button is not available until you code and save a record after each login. Click the **Information (i)** button to see how the last save was coded.

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.



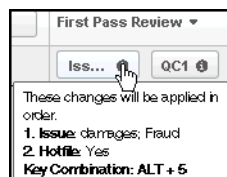
Shortcuts

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.

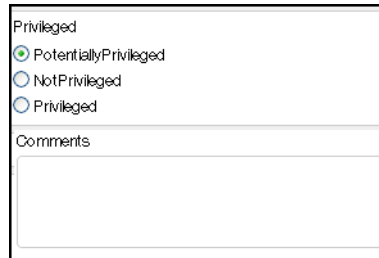
This **Shortcut** button also has a keyboard hot key combination of ALT+5; instead of clicking the **Shortcut** button, the reviewer can choose to hold down the ALT key and the 5 key to code the form according to this **Shortcut** button.



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.



Privileged

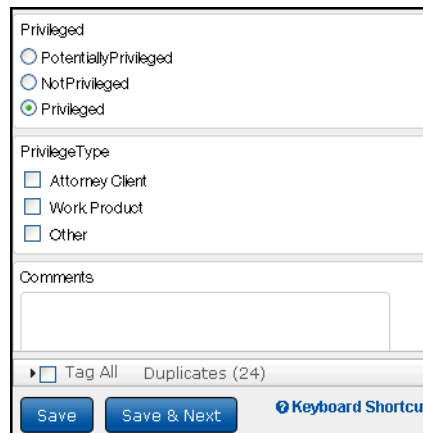
PotentiallyPrivileged

NotPrivileged

Privileged

Comments

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



Privileged

PotentiallyPrivileged

NotPrivileged

Privileged

PrivilegeType

Attorney Client

Work Product

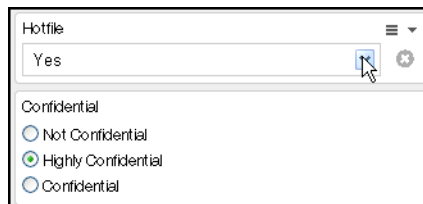
Other

Comments

▶ Tag All Duplicates (24)

Save Save & Next Keyboard Shortcuts

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**.



Hotfile

Yes

Confidential

Not Confidential

Highly Confidential

Confidential

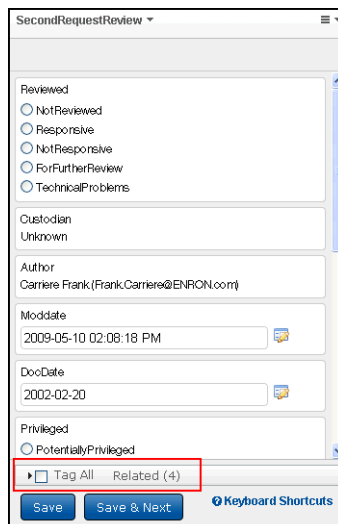
Your administrator will provide information about the rules and shortcuts associated with your forms.

Associated Documents

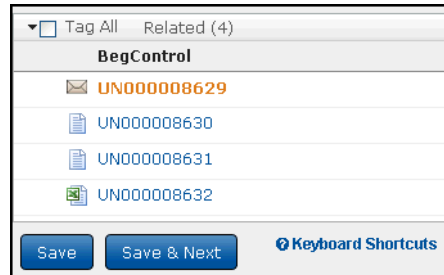
Your site may have documents that have other documents associated to them, such as related documents or duplicate documents. You can easily access these documents and find out other information about the types of associations. Associated documents are grouped in the lower portion of the form. Often, the **Tag All** checkbox is available for you to apply the changes you make to all the documents.

Related

Family relationships are organized 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.

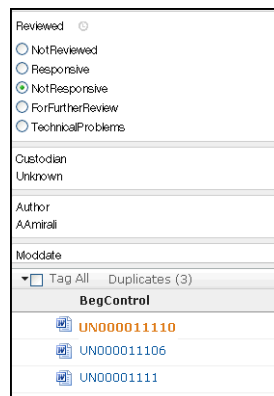


The document you are viewing is in the orange, larger font in the list. You can display a related document in the Document pane at the left by clicking it in the list. If the list is large, use the scroll bar to see the entire list. You can code related documents individually from this view by clicking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

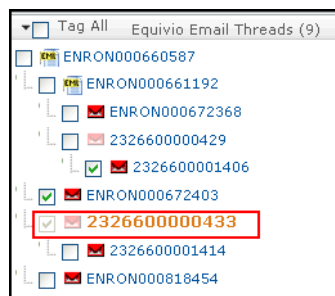


Equivio Email Threads

Your site may have been processed using Equivio technology for email threading identification. Links to email records that are part of the thread are displayed at the bottom of a form. You can view the inclusiveness of the thread and open any email attachments.

Inclusive email threads are represented by red Envelopes. Partially red indicates an inclusive minus email, meaning that the email is inclusive of the entire conversation, but a previous email in the thread has an attachment that is missing. A blue Envelope indicates a missing email from the thread. The link for this node is not clickable, as there is no document in the site, but it is useful information for analysis.

Reviewing the inclusive email (red) from the thread will provide all the email conversations in the thread. Select the **Tag All** checkbox to code all the emails the same way or select specific emails using the checkboxes. You are in the email in larger, orange font.

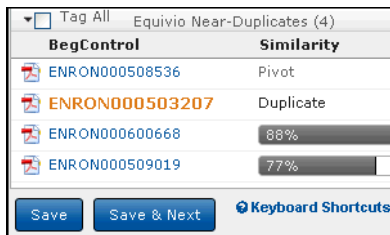


Equivio Near Duplicates

Equivio processing identifies both duplicate documents and near-duplicate documents. The **Equivio Near Duplicates** section is also located at the bottom of the form. Besides access to the documents, you can also see how similar a document is to the Pivot document. Click the **Triangle** button at **Equivio Near Duplicates**. The Pivot document is usually the document that has the most words in it compared to the other documents in the near duplicate identification process (or it may be the newest document). The Grey bar is a visual indicator of similarity. Duplicate means that the documents are exact duplicates and their binary signatures are identical. Documents that are 100% similar contain exactly the same text, but their binary

signatures are different. This may be because the formatting of the text is different, such as different font or alignment.

You are displaying the document that is in larger, orange font. Click another document to open it.



If appropriate, select the **Tag All** checkbox to code all the near-duplicate documents in the same way.

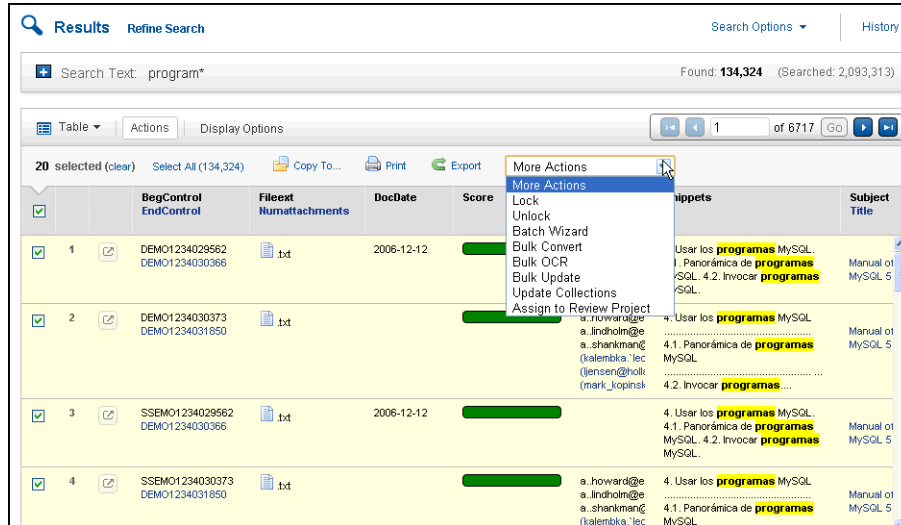
Actions

If you have appropriate permissions, the **Results** page, which displays the documents returned from a valid search or an opened folder, allows you to perform several actions to documents, including:

- Copying documents to a folder
- Creating a batch print job
- Exporting selected data from fields of chosen 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

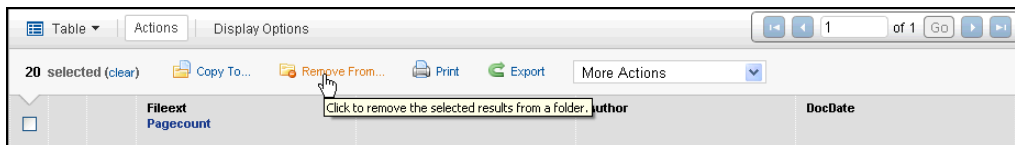
Actions are permission-based, and you will be given rights to conduct the actions you need. You may have access to all the available actions or specific actions.

In the **Results** page, click the **Actions** button. A checkbox will display beside each document, allowing you to select certain documents; you can also select your entire set of document results or just the page of documents currently displayed.



After clicking the **Actions** button, you will also see the actions you can take to the documents. The above image shows the **Folder**, **Print** and **Export** links and the expanded **More Actions** menu, which will list other actions 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, tailor their contents and determine which other users may see and access the folders. To create a folder from the **Folders** structure and for more information, see the [Folders section](#).

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. You can also copy an opened document to a folder, please refer to the [Documents section](#).



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.

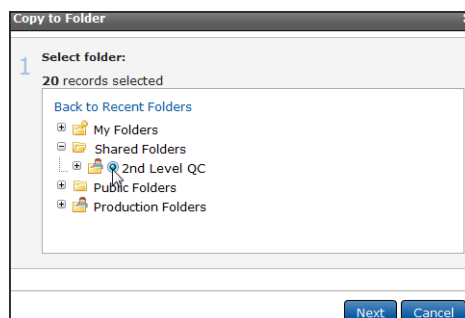
When using the **Copy to Folder** function, you can use an already created folder or create a new one during the process.

To copy documents to a folder from the Results page, click the **Actions** button, and use the checkboxes to select your documents.

Next, click the **Copy to Folder** link.

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** to go to the **Copy to Folder** dialog box.

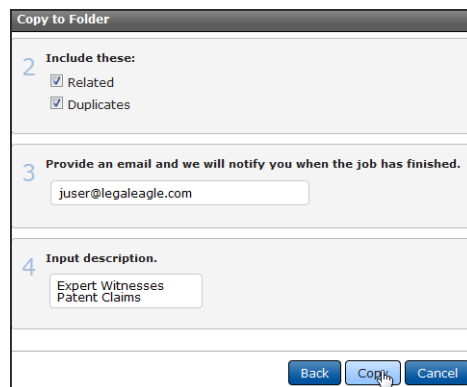
If the folder isn't in the list, click **Other Folders**. Folders are structured by access level. Find your folder in the appropriate top-level access folder, select its option button, and click **Next** to go to the **Copy to Folder** dialog box.



If the folder does not already exist, you can create a folder on the fly.

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.



The screenshot shows a 'Copy to Folder' dialog box with three numbered steps. Step 2, 'Include these:', has two checked checkboxes: 'Related' and 'Duplicates'. Step 3, 'Provide an email and we will notify you when the job has finished.', has a text input field containing 'juser@legaleagle.com'. Step 4, 'Input description.', has a text input field containing 'Expert Witnesses Patent Claims'. At the bottom right, there are three buttons: 'Back', 'Copy', and 'Cancel'.

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.

Creating Folders on the Fly

Your top-level access folders are **My Folders**, **Shared Folders**, **Public Folders**, and you may have rights to and, therefore, see **Production Folders**.

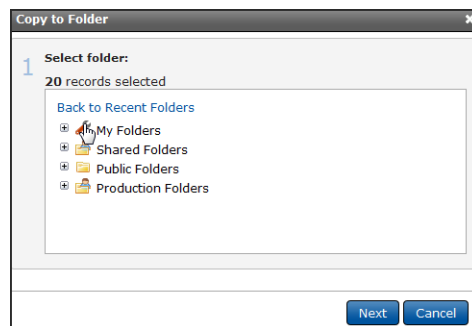
Shared Folders are folders shared with you by other users but are not public for every user on the site to access. You are not able to edit **Shared Folders**, since other users have built these folders and shared them with you.

Use **My Folders** to create folders for just your use or folders to share with select users.

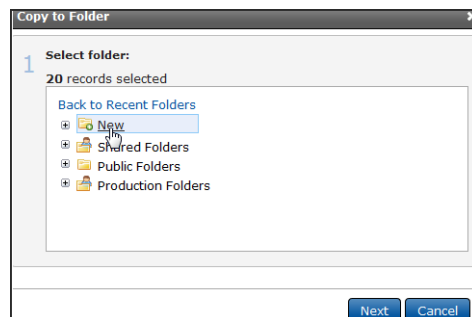
When you don't need to select the other users to give access to a folder and instead want all users to see and have the ability to access that folder, use **Public Folders**.

If you have rights to **Production Folders**, you can also copy documents to folders for production.

Ensure you are at the top-level folder structure (after clicking **Copy to Folder**, click **Other Folders**). When you point to a folder, a wrench will appear if you have rights to edit the folder contents. Click the wrench to create a new sub-folder.



Click the **New** link.

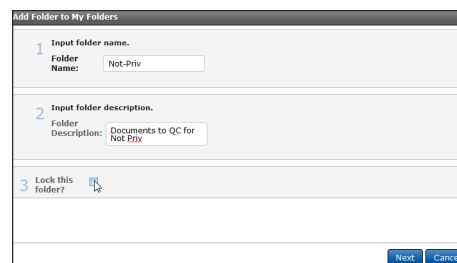


Ensure you are at the appropriate access level folder. For example, if you want to make a new **Public Folder**, click the tool at **Public Folders**. You will be able to edit your folders and establish new access levels or give other users rights to folders later, but it is best practice to establish your folder in the appropriate top-level access folder.

In the **Add Folder To ...** dialog box, enter your new folder's name. You must give your folder a name. If you enter an invalid character or character length, you will receive a prompt.

You can also enter a description if desired. This description becomes a tool tip when the folder is pointed to in the Folders structure.

Select the **Lock this Folder** checkbox if you want to ensure the contents are not changed after you've performed this copy function. As the folder creator, you would be able to unlock the folder if you want to change the contents at a later time.



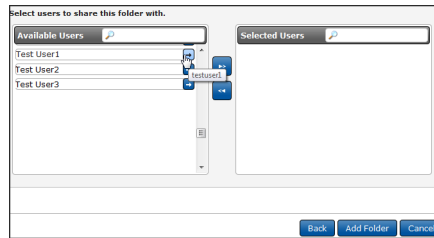
Click **Next** when ready.

If you chose to make a new folder under the **My Folders** top-level folder, you will have the ability 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** text 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.

If you want to leave the folder private for just your use, don't include any users in the **Selected User** text box.

The **Users** you select will have access to the folder and its contents under the **Shared Folders** top-level folder.

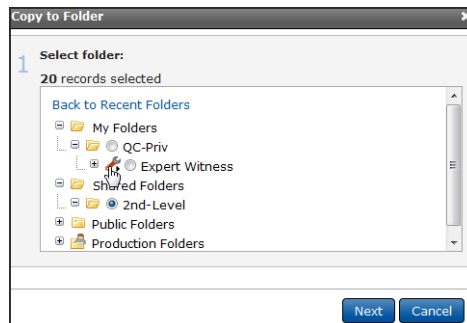


If your site is a Private Field site, you will only be able to share a folder with users who have access to the same fields that you do.

If you've created a folder under the **Public** or **Production** top-level folders, you won't see the step to select users.

Click **Add Folder**. You will now see your folder in the folder structure. Select its option button, and click **Next** to go to the **Copy to Folder** dialog box.

You can also nest a new folder within a sub-folder:



To monitor your copy jobs, click the **Monitors** button and then click **Folder/Field Updates** under **Jobs**.

Remove From Folder

You may have permissions to remove documents from a folder. When removing documents from a folder, you are not deleting documents from the site, only removing the link to a specific document from the opened folder.

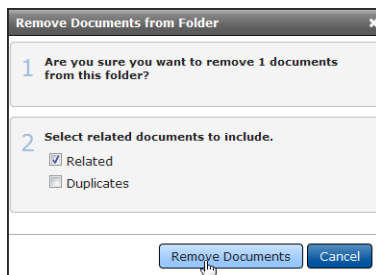
You must open the folder to display the foldered documents in the **Results** page.

Click **Actions**, and select your documents using the checkboxes.

Then, click the **Remove From Folder** link.

In Step 2, select whether to remove duplicates or related documents using the checkboxes, and then click the **Remove Documents** button.

The selected documents are not deleted. Quick access to them via this folder is no longer available.



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.

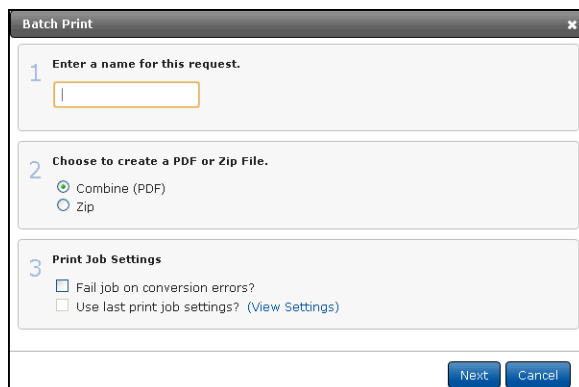
It is important to note that clicking the **Print** link at **Actions** in the **Results** page is not sending a document or documents directly to your local or network printer; instead, it is allowing you to create a downloadable file of all your selected documents and, if you select to make a PDF, allowing you to customize the PDF file.

To access this feature, click **Actions** in the **Results** page, and select your documents using the checkboxes.

Next, 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.

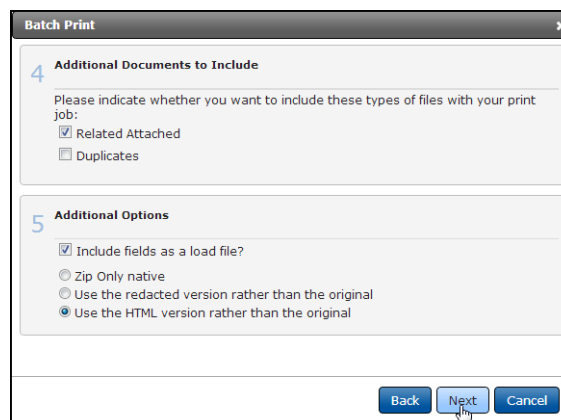
Click **Next**.

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.



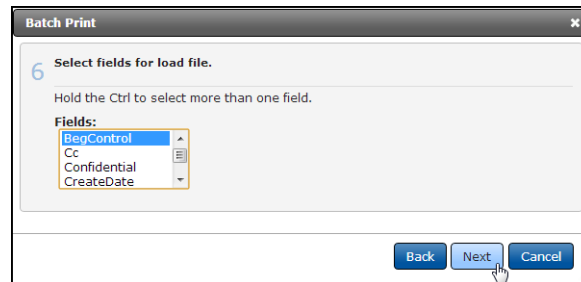
The screenshot shows a dialog box titled "Batch Print" with a close button (X) in the top right corner. It is divided into two sections:

- 4 Additional Documents to Include**: This section contains the text "Please indicate whether you want to include these types of files with your print job:" followed by two checkboxes: "Related Attached" (checked) and "Duplicates" (unchecked).
- 5 Additional Options**: This section contains a checkbox "Include fields as a load file?" (checked) and three radio buttons: "Zip Only native" (unselected), "Use the redacted version rather than the original" (unselected), and "Use the HTML version rather than the original" (selected).

At the bottom of the dialog box, there are three buttons: "Back", "Next" (with a mouse cursor over it), and "Cancel".

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

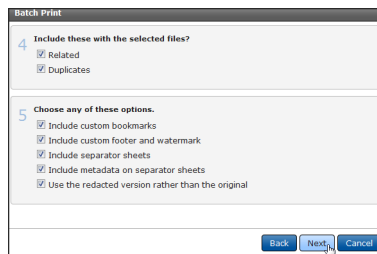
SHIFT key on your keyboard to highlight more than one field. The fields listed are determined by your site administrator.



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 version, either full redaction boxes or transparencies.

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

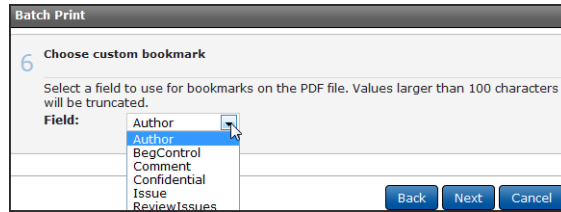
Custom Bookmarks

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**.

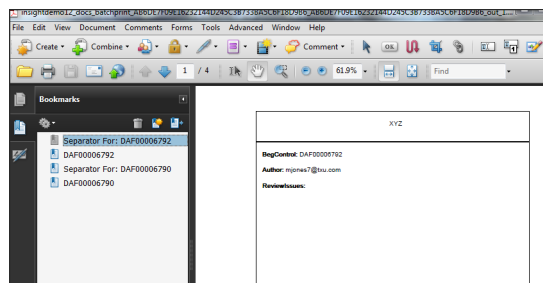
Using the **Arrow**, expand the menu to see the fields available, and click your field, and then click **Next**. The fields available to use for a bookmark are enabled by your site administrator.



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.

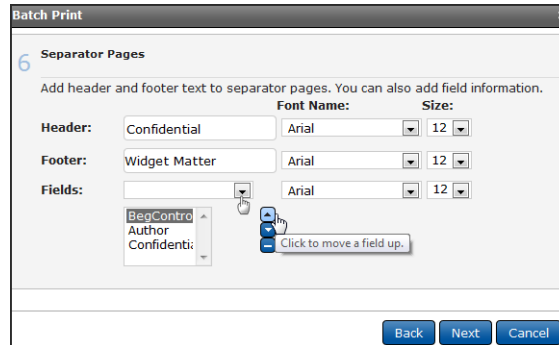
Click **Next** when ready.

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.

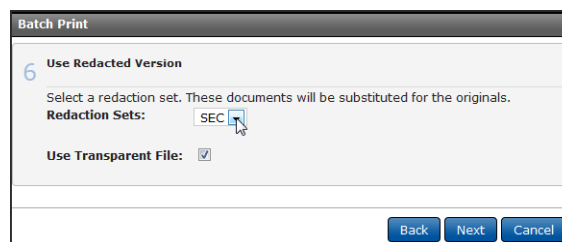


Click **Next**.

Use Redacted Version

If you selected to include the redacted versions of documents at **Choose Any of These Options** in the **Batch Print Wizard**, you can designate the redaction set. Expand the **Redaction Set** menu using the drop-down arrow and click the appropriate set name.

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.



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

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**.

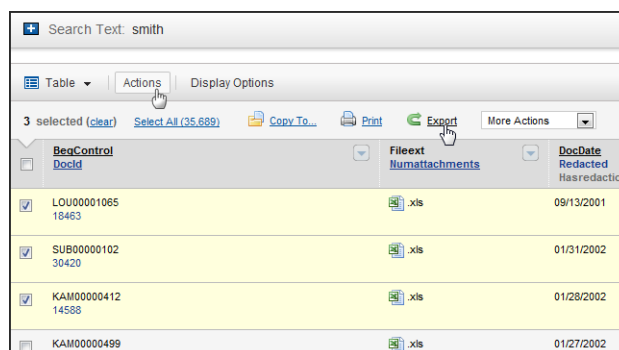
Exporting Fielded Information

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.

Export is available in the **Results** page as part of the **Actions** features, which are made available by clicking the **Actions** button.

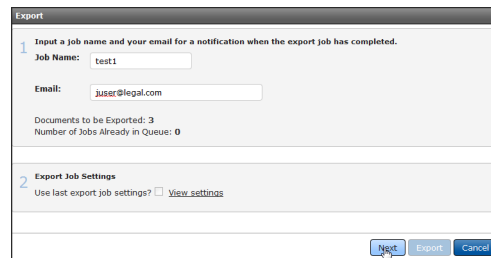
Select documents using the checkboxes and then click the **Export** link.



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, Catalyst 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.

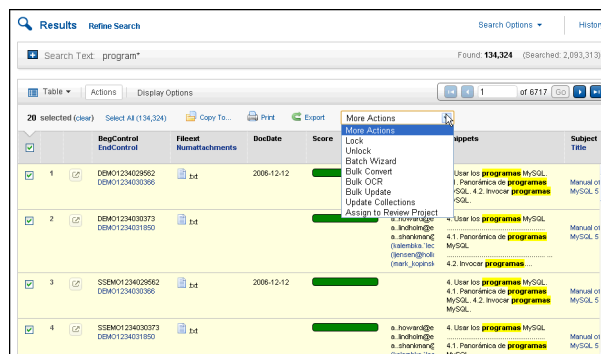
Click **Export**. The window will close, and the job will be submitted. You will receive an email containing a hyperlink for quickly accessing your file when the file is ready. You can also find any exported files at **Export** in [Monitors](#).

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.

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



Lock/Unlock Documents

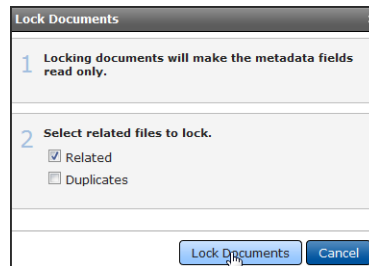
If you have the proper permissions you can lock or unlock documents. Locking makes documents read only—the coding in the form cannot be changed. **Save** and **Save & Next** and certain other functions are unavailable (they will appear dimmed).



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, click **Actions** 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.



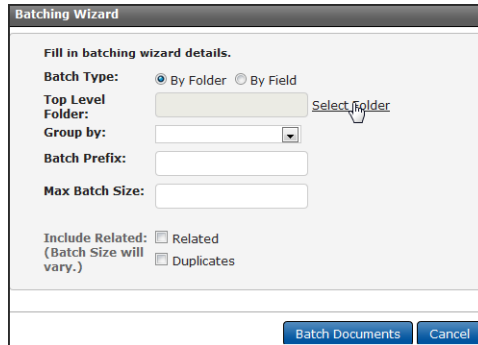
Batch Wizard

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** button will be available in the **More Actions** menu. In the Results page, click **Actions** and then use the checkboxes to select your documents. Expand the **More Actions** menu and click **Batch Wizard**.

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

Batch by Folder

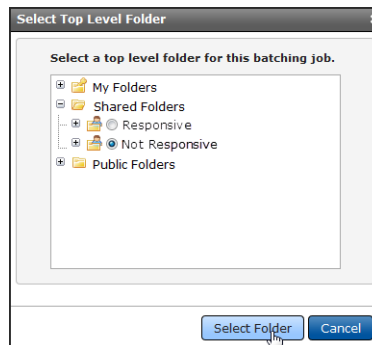
Keep the **Batch Type** set to **By Folder**, to group your documents into a **Static Folder** that you or another user has created and is already in the folder structure.



The image shows a 'Batching Wizard' dialog box with the following fields and options:

- Batch Type:** Radio buttons for 'By Folder' (selected) and 'By Field'.
- Top Level Folder:** A text box with a 'Select Folder' link to its right.
- Group by:** A dropdown menu.
- Batch Prefix:** A text box.
- Max Batch Size:** A text box.
- Include Related:** Checkboxes for 'Related' and 'Duplicates' (Batch Size will vary.).
- Buttons:** 'Batch Documents' and 'Cancel' at the bottom right.

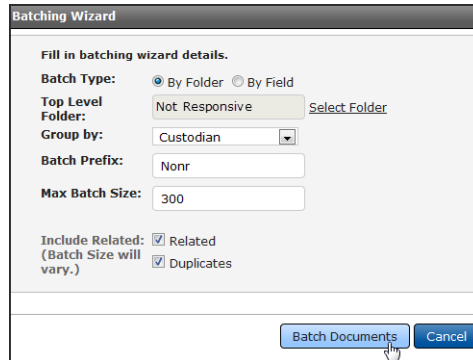
The **Top Level Folder** text box is a required field. To populate it, click the **Select Folder** link. This opens the **Static Folders** structure. Expand the folders, and use the option button beside a folder to select it, and then click the **Select Folder** button.



The image shows a 'Select Top Level Folder' dialog box with the following structure:

- Title:** 'Select Top Level Folder'.
- Instruction:** 'Select a top level folder for this batching job.'
- Folder Tree:**
 - My Folders
 - Shared Folders
 - Responsive
 - Not Responsive
 - Public Folders
- Buttons:** 'Select Folder' and 'Cancel' at the bottom right.

Your folder now populates the **Top Level Folder** box. The remaining text box fields are also required.



The image shows a 'Batching Wizard' dialog box with the following fields and options:

- Batch Type:** Radio buttons for 'By Folder' (selected) and 'By Field'.
- Top Level Folder:** A text field containing 'Not Responsive' and a 'Select Folder' button.
- Group by:** A dropdown menu with 'Custodian' selected.
- Batch Prefix:** A text field containing 'Nonr'.
- Max Batch Size:** A text field containing '300'.
- Include Related:** Two checked checkboxes: 'Related (Batch Size will vary.)' and 'Duplicates'.
- Buttons at the bottom: 'Batch Documents' and 'Cancel'.

Group By

Expand the **Group By** menu field and select a field. The **Group By** 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. Your site administrator configures this list of available fields.

Batch Prefix

At **Batch Prefix**, enter a 1-6 alpha character prefix. 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 you choose to add a prefix, for example ABC, you will create batches ABC0001 through ABC0900.

Max Batch Size

Max Batch Size sets the maximum number of documents in each batch. You can choose to batch in any number between 50 and 9999, meaning the smallest batch you may make is 50 documents and the largest 9999. 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.

Include Related, Duplicates

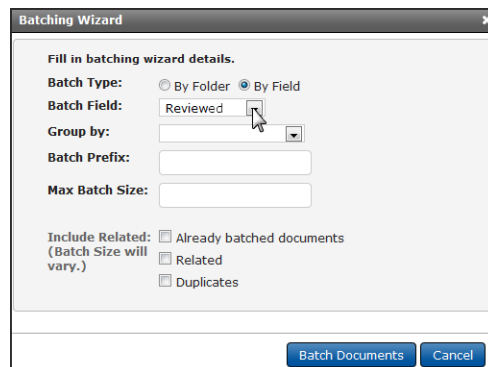
To keep the related documents and/or the duplicates in the same batch as the parent/original documents, select the appropriate checkboxes. The document counts may increase in your batches, because the related or duplicate documents will be included in the parent or original document batch.

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 in the **Administration/Case 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 **Reviewed** field. The Dynamic Folders structure will be based on the values in the **Reviewed** field.



Batching Wizard

Fill in batching wizard details.

Batch Type: By Folder By Field

Batch Field: Reviewed

Group by: [Dropdown]

Batch Prefix: [Text Box]

Max Batch Size: [Text Box]

Include Related: Already batched documents
(Batch Size will vary.) Related Duplicates

Batch Documents Cancel

See the above sections for information on completing the remaining text box fields.

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 into your batches if

you select it. 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 at **Batching** in the **Monitors** section under **Jobs**.

Bulk Convert to PDF

For most native files, you can create a PDF version in the opened document; you can also create PDF versions of documents in bulk from the **Results** page.

To convert multiple records to PDF, click **Actions** in the **Results** page and select your documents using the checkboxes.

Expand the **More Actions** list 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.

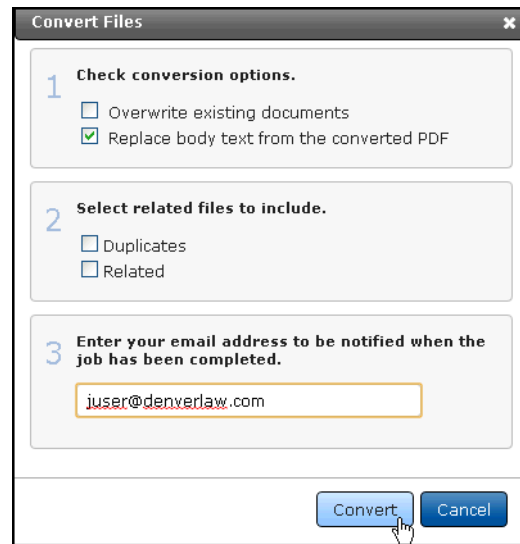
You may also have permission to replace the body text from the converted PDF. This replaces the document's text (for searching and in the HTML view) with the text taken from the PDF version.

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**.



The image shows a 'Convert Files' dialog box with three numbered steps. Step 1, 'Check conversion options.', has two checkboxes: 'Overwrite existing documents' (unchecked) and 'Replace body text from the converted PDF' (checked). Step 2, 'Select related files to include.', has two checkboxes: 'Duplicates' (unchecked) and 'Related' (unchecked). Step 3, 'Enter your email address to be notified when the job has been completed.', has a text input field containing 'juser@denverlaw.com'. At the bottom right are 'Convert' and 'Cancel' buttons, with a mouse cursor pointing at the 'Convert' button.

Bulk OCR

If you have appropriate permissions, you will be able to run OCR software on a document or set of documents directly in the Insight interface. This is typically done to non-indexed documents (the text of the document is not searchable) and will allow users to search the text of the document.

Once the OCR process is ready, a searchable PDF format will be appended to the record. If the record is in PDF or has been converted to PDF, you can select to replace the PDF with your new OCR'd PDF.

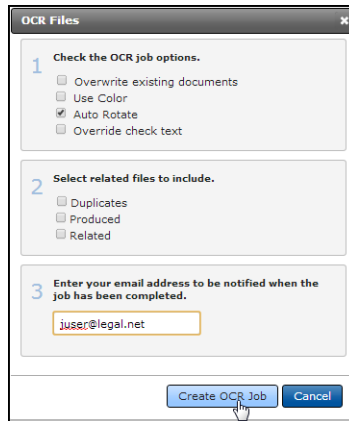
To OCR documents, display the appropriate documents in the **Results** page, click **Actions** and select your documents using the checkboxes.

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 exists, you can replace it with this OCR'd version by selecting this checkbox.
- **Use Color**—If the record is color or image intensive, you may want to use 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.



The screenshot shows a dialog box titled "OCR Files" with three numbered steps:

- 1 Check the OCR job options.**
 - Overwrite existing documents
 - Use Color
 - Auto Rotate
 - Override check text
- 2 Select related files to include.**
 - Duplicates
 - Produced
 - Related
- 3 Enter your email address to be notified when the job has been completed.**

At the bottom, there are two buttons: "Create OCR Job" and "Cancel".

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, click **Actions** in the **Results** page and 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.

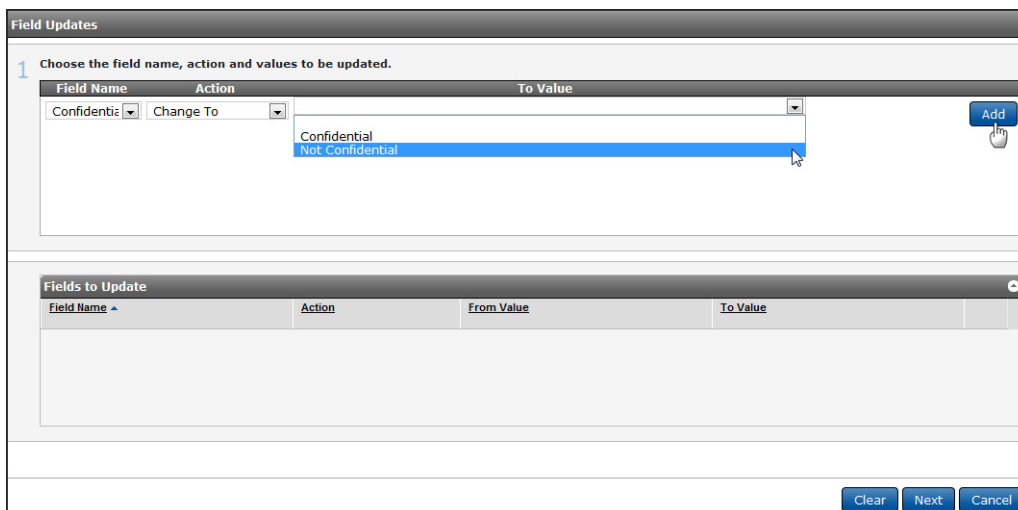
Bulk Updating a Single-Value Field

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 coding 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.



Field Updates

1 Choose the field name, action and values to be updated.

Field Name	Action	To Value
Confidential	Change To	Confidential
		Not Confidential

Fields to Update

Field Name	Action	From Value	To Value

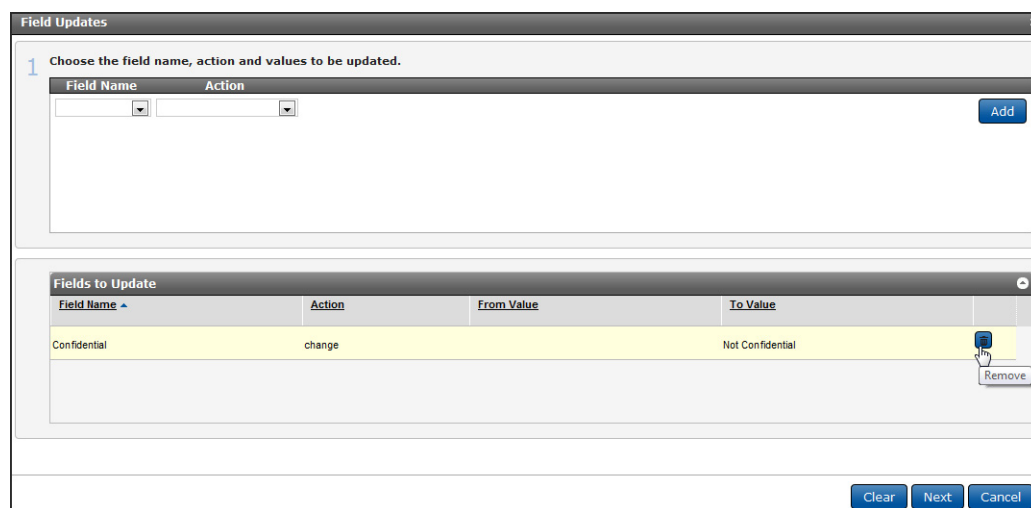
Clear Next Cancel

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.



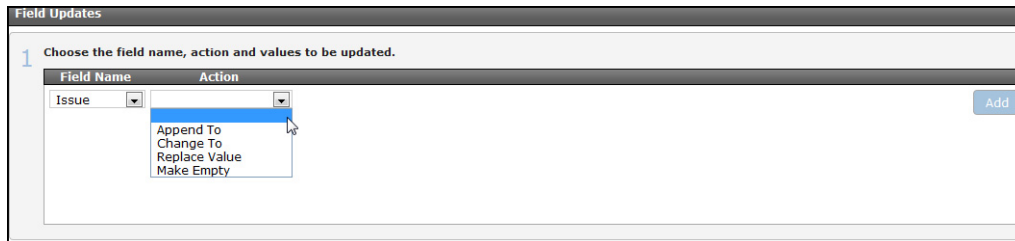
Click **Next** to go to the **Field Updates** dialog box.

Bulk Updating a Multi-Value Field

Multi-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** and **Make Empty**.

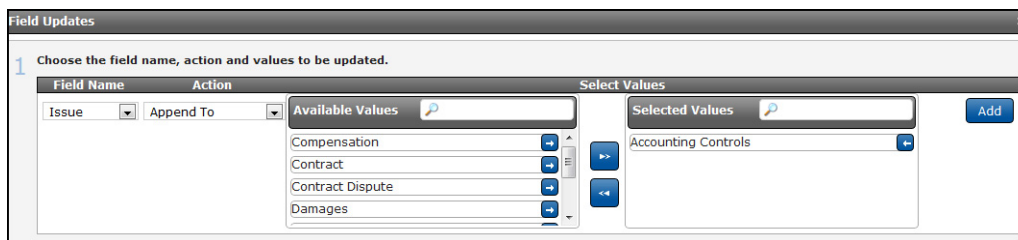


Append To

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.



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.



Field Name	Action	To Value
Issue	Change To	Fraud

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.



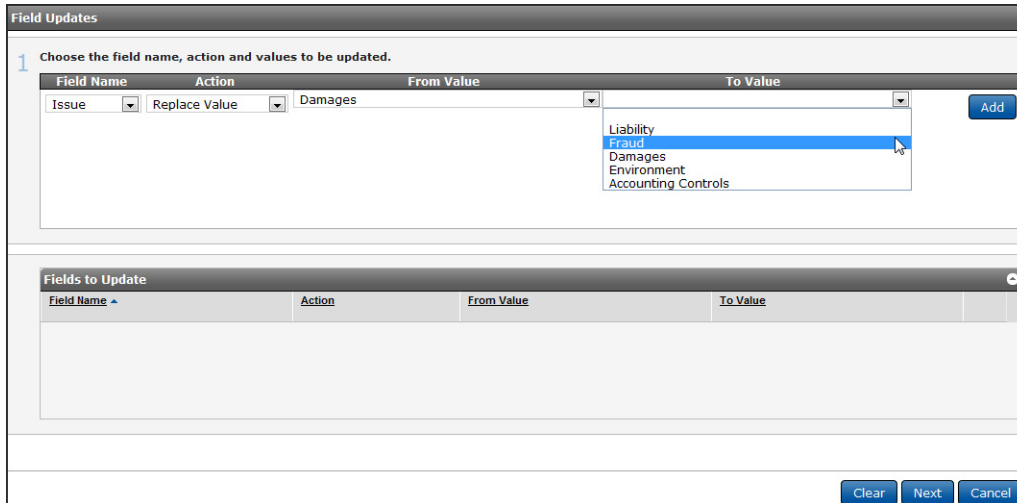
It is important to remember that **Replace Value** is only available in multi-value fields.

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.



The screenshot shows the 'Field Updates' dialog box. At the top, it says '1 Choose the field name, action and values to be updated.' Below this is a table with columns: Field Name, Action, From Value, and To Value. The 'Field Name' dropdown is set to 'Issue', 'Action' to 'Replace Value', and 'From Value' to 'Damages'. A dropdown menu is open for 'To Value', showing options: Liability, Field (highlighted), Damages, Environment, and Accounting Controls. An 'Add' button is to the right. Below the table is a section titled 'Fields to Update' with a table header: Field Name, Action, From Value, To Value. At the bottom are 'Clear', 'Next', and 'Cancel' buttons.

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** under **Jobs**.

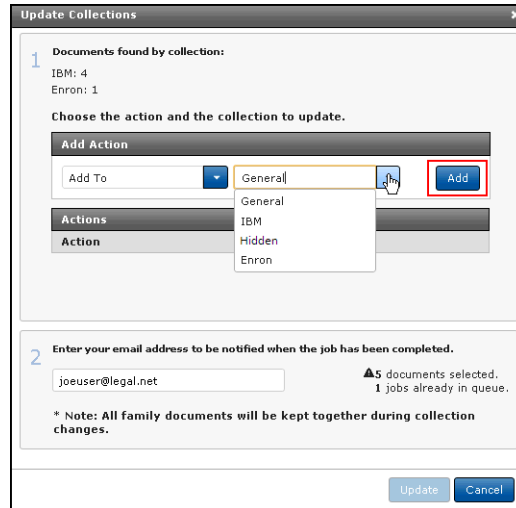
Update Collections

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 least one collection.

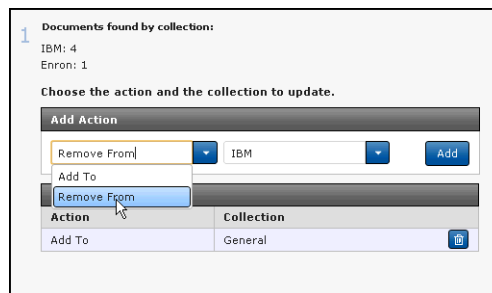
To access this feature, when the appropriate documents are available in the **Results** page, click **Actions** and select the documents using the checkboxes. Then expand the **More Actions** menu and click **Update Collections**.

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.

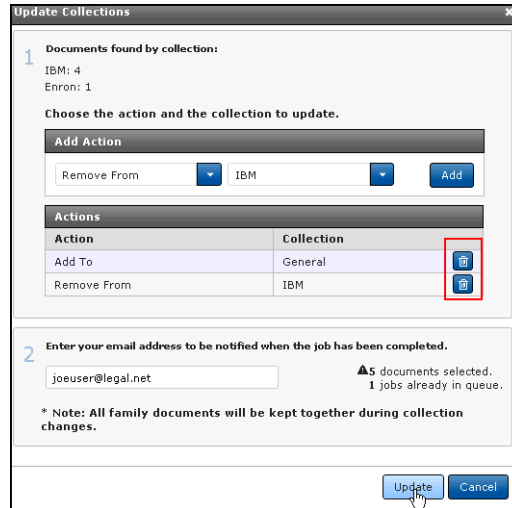


You can include more actions, such as adding the documents to yet another collection.

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.

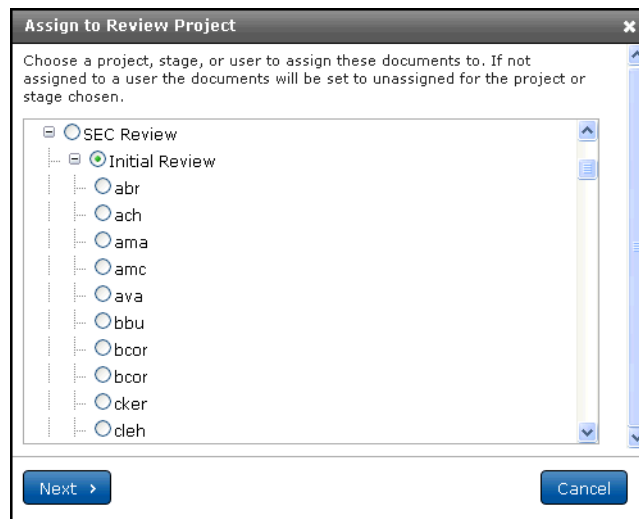
Assign to Review Project

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.

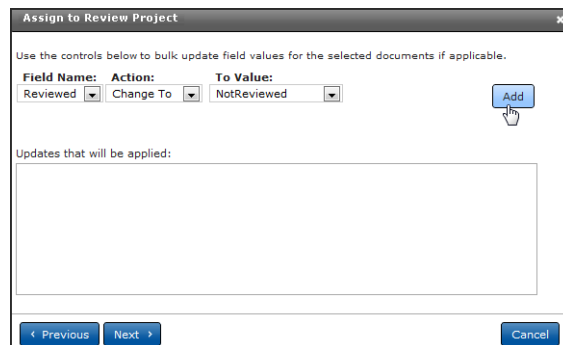
In the **Results** page, click the **Actions** button, and use the checkboxes to select your documents.

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).

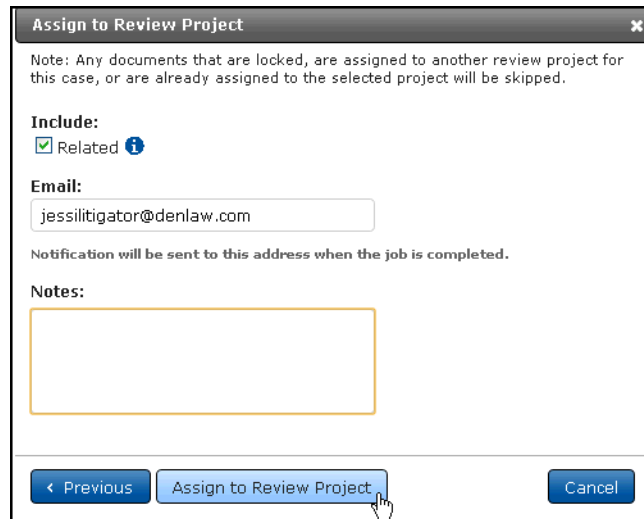


Click **Next** and, if necessary, you can bulk update fields in the documents in the **Assign to Project** wizard (see [Bulk Update](#) for more information on using the **Bulk Update** menus). You are not required to bulk update fields.



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.



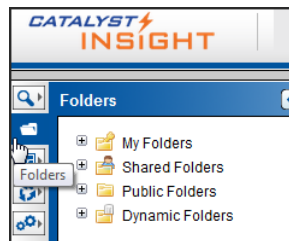
The dialog box titled "Assign to Review Project" contains the following elements:

- Note:** Any documents that are locked, are assigned to another review project for this case, or are already assigned to the selected project will be skipped.
- Include:** A checked checkbox for "Related" with an information icon.
- Email:** A text input field containing "jessilitigator@denlaw.com".
- Notification:** A line of text stating "Notification will be sent to this address when the job is completed."
- Notes:** A large empty text area for additional information.
- Buttons:** Three buttons at the bottom: "< Previous", "Assign to Review Project" (with a mouse cursor), and "Cancel".

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

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** view.



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 through the interface.

Dynamic Folders are virtual folders that make navigating to documents quick and easy. The folder structure is based upon database fields you and other reviewers tag in 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.

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**.

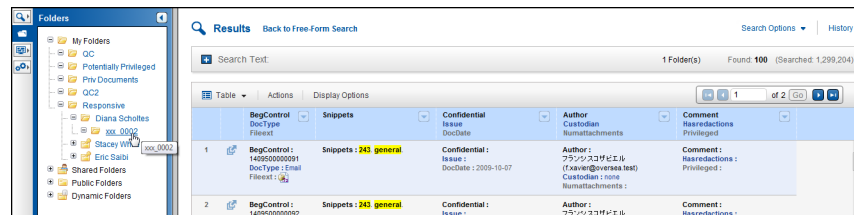
My Folders are the folders you create and can be private to just you or you can share them with select users.

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.

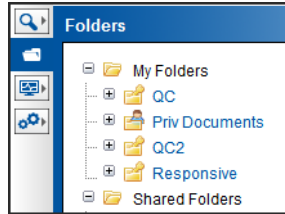
To display the contents of any folder available to you, expand to the folder structure using the **Plus (+)** buttons beside the folders and then click the folder name. The documents associated with the folder appear in the **Results** page.



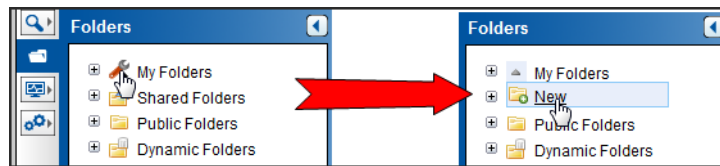
My Folders

To create, edit properties or delete a folder, 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 pestle are not shared with other users. Notice in the below image, the **Priv Documents** folder is represented by a folder with a person; this means you have shared this folder with one or more users on the site. The other folders in **My Folder** have a pestle, showing that they are not available to other users.



To create a private or shared folder, point to **My Folders**. A **Wrench** button appears, signifying that you can make changes to this folder structure. Click the **Wrench** and then click **New**.



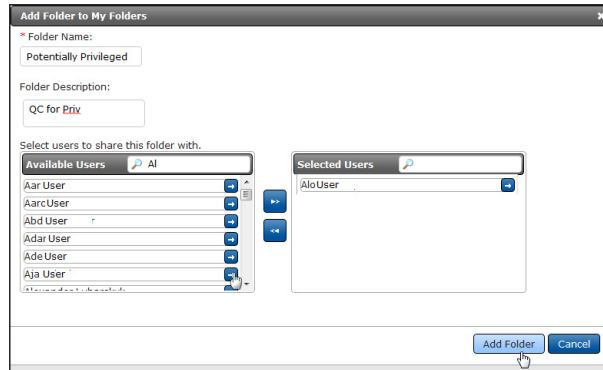
In the **Add Folder To My Folders** dialog box, enter your new folder's name. This is required, and if you enter an invalid character or character length, you will receive a prompt.

You can also enter a description, which displays a tool tip when the folder is pointed to. 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**.

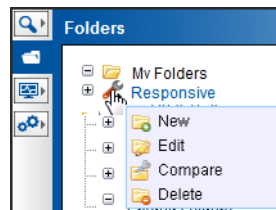


If your site is a Private Field site, you will only be able to share a folder with users who have the same fields permissions as you.



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. See the [Compare Folders section](#).

Point to the sub-folder and click the **Wrench** to see the options available. To add a folder, click **New**. To edit the properties of the folder, click **Edit** or remove it by clicking **Delete**.



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

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.

When you point to a sub-folder within **Shared Folders** if a **Wrench** appears, clicking it will display the **Compare** link if you have rights to compare folders.

To display the documents associated with the folder, click the folder name. The documents are displayed in the **Results** page. Actions you can take to the documents depend upon your permissions.

Public Folders

Users with rights to Public Folders will be able to access existing folders and create folders within Public Folders. When creating or editing a folder at this level, you will not establish which other users can access the folder; on most typical sites, all users will be able to see these folders. You will be able to edit and delete folders that you created.

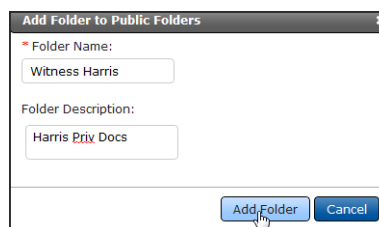


Administrators may have the right to edit or delete folders created by users in **Public Folders**.

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 **Wrench** 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**.



Add Folder to Public Folders

Folder Name:
Witness Harris

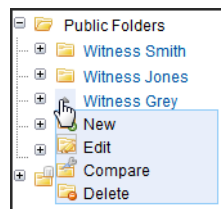
Folder Description:
Harris Priv. Docs

Add Folder Cancel

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.

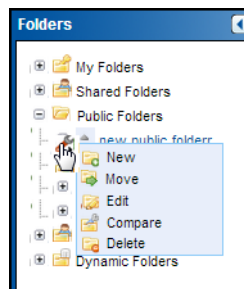
Point to the sub-folder and click the **Wrench** to see the options available. To add a folder, click **New**. To edit the properties of the folder, click **Edit** or remove it by clicking **Delete**.

If you need to edit the folders properties, upon clicking **Edit** you can change the folder's name, add or edit the tool tip at **Description**. The **Edit Folder** dialog box works identically to the **Add Folder** dialog box (see above).



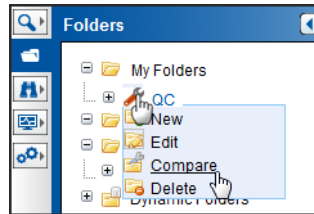
If you are associated to a Role with the permission **ManagePublicFolders**, you can create sub-folders within user-created **Public Folders**, even those you did not create. This permission also allows you to edit the existing name of a folder in **Public Folders**, move a folder within **Public Folders**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

Point to the folder within the **Public Folders** and click the **Wrench**. Then, make your select in the menu.

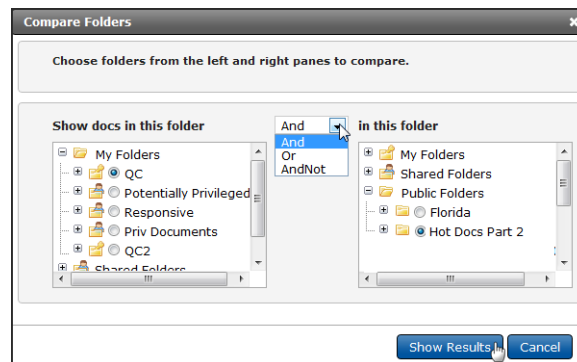


Compare Folders

If you have permissions to **Compare Folders**, point to one of the folders you'd like to compare. Click the **Wrench** and then click the **Compare** link. This allows you to compare the contents of two different static folders.



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.



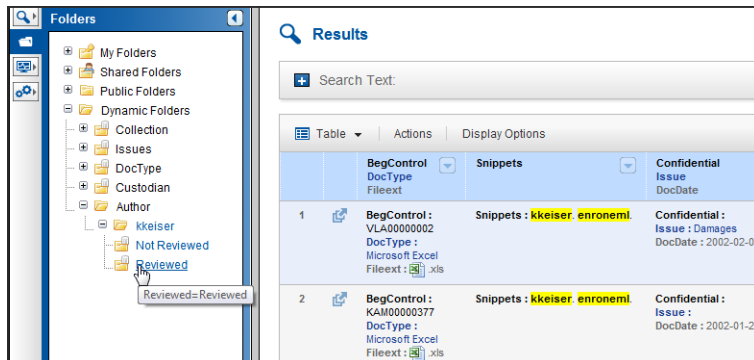
Dynamic Folders

Dynamic Folders are virtual folders set up to structure the review workflow on your site. The structure is based upon fields you and other users will be coding in documents. 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.

In the below image, clicking the **Not Reviewed** folder returns all documents where the **Author** is **kkeiser** and the documents have not been reviewed.



	BegControl	DocType	Fileext	Snippets	Confidential	Issue	DocDate
1	BegControl : VLA00000002	DocType : Microsoft Excel	Fileext : .xls	Snippets : kkeiser enronemi	Confidential : Issue ; Damages		DocDate : 2002-02-07
2	BegControl : KAM00000377	DocType : Microsoft Excel	Fileext : .xls	Snippets : kkeiser enronemi	Confidential : Issue ; Damages		DocDate : 2002-01-28

As you code and save documents, the **Dynamic Folders** structure dictates how the saved documents will be foldered. In the above structure, documents in the **NotReviewed** folder that are coded as **Reviewed** and then saved are moved to the **Reviewed** folder automatically. Opening the **Reviewed** folder returns all documents where the **Author** is **kkeiser** and the **Reviewed** field is coded as **Reviewed**.

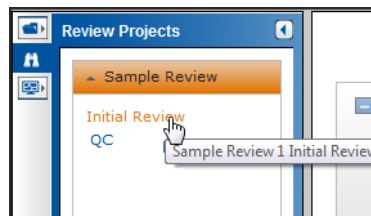
Your Review Projects

Your site may be set up with review projects, which allow you fast access to the documents you need to review. A review project is made up of stages, and you will be assigned to the stages where you need to work. Once you code and save documents, you can release them. If available, you will also be able to retrieve more documents as you are working within a stage.

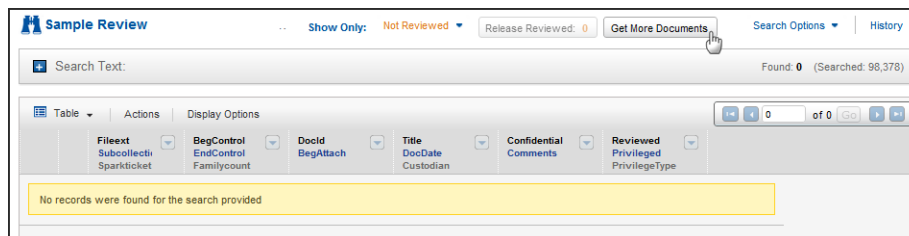
Your site can have more than one review project and each project may have several stages. Perhaps your review manager has tasked you with reviewing documents in a first pass stage and also with reviewing documents in a QC stage of a particular project. Insight will display the project and these stages for you.

Click the **Review Projects** (binoculars) button in the left navigation bar. You will see the project or projects, which you have been assigned in the **Review Projects** menu.

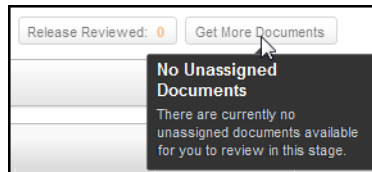
Expand the project and click the stage:



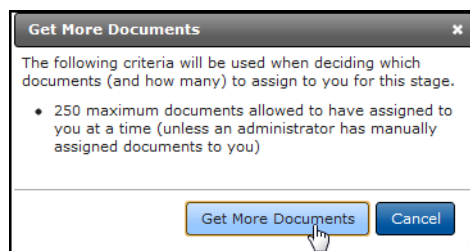
The **Results** page appears at the right. Unless your administrator has assigned documents specifically to you, the page will be empty when you first access it. Click the **Get More Documents** button to obtain documents from the **Unassigned** status of the stage.



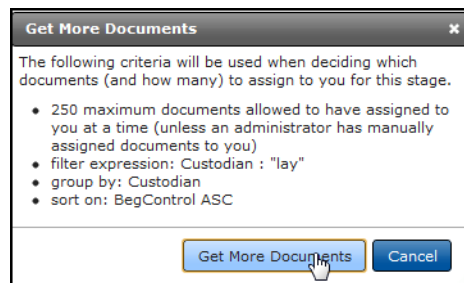
If no documents are currently available, the **Get More Documents** button will display this message:



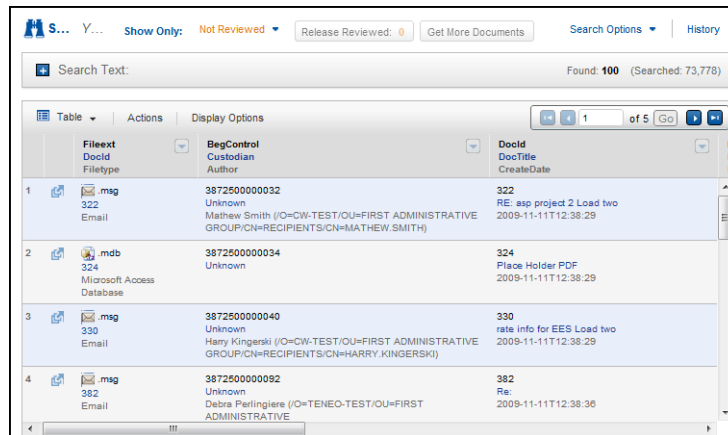
When documents are available in your stage, clicking the **Get More Documents** button displays a summary dialog box. This allows you to see the parameters established by your review administrator for this stage when you pull in documents. This includes the maximum number of documents each reviewer can have in a particular stage.



Your administrator can also establish filters that will assign specific documents first. Perhaps all the documents need to be reviewed in the **First Pass** stage, but certain custodians' documents need to be reviewed ad 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

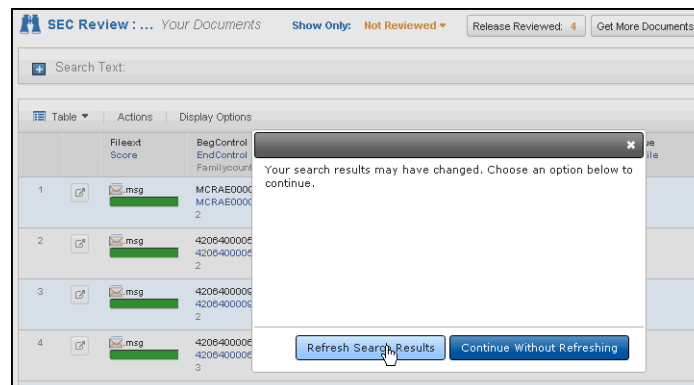


When ready, click the **Get More Documents** button in the dialog box. The system will refresh and your documents will appear in the **Results** page. Please see the [Results section](#) for more information about working with your **Results** page and tailoring it to your needs.



To open, code and save documents, refer to the [Documents section](#) for complete details.

As you code and save documents, their status will change from **Not Reviewed** to **Reviewed**. 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 reviewed category.

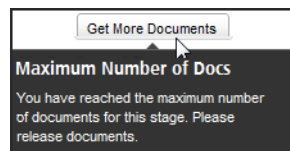


Maximum Number of Documents

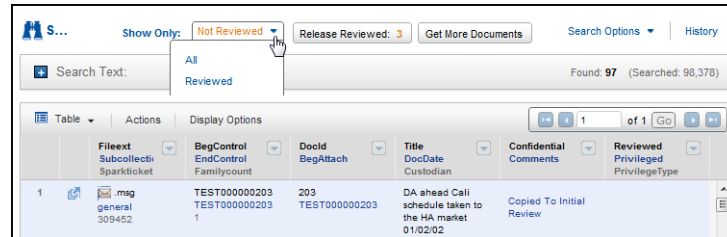
Your administrator has determined the total number of documents that can be assigned to you at a time in a stage. As you begin to code and save your documents, they will move from the **Not-Reviewed** status to **Reviewed** and be available to release. If the threshold for the stage is 100 documents, 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.

If your administrator has set up your project to keep document family relationships together, 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.

If your project does not maintain families, then the maximum documents limit will be enforced.

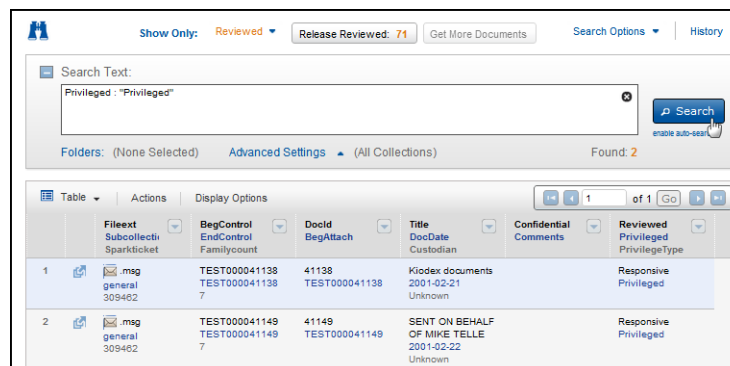


The default setting for displaying documents in your stage's **Results** page is **Not Reviewed**. Use the **Show Only** menu and select **All** to display all the documents assigned to you in the stage. Selecting **Reviewed** will display only those documents you've already reviewed and coded. Before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



Review Project Searching and Advanced Settings

You can search within your stage and control your **Advanced Settings** selections. Perhaps you have reviewed and coded a number of documents and prior to releasing them you'd like to QC the documents you 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.

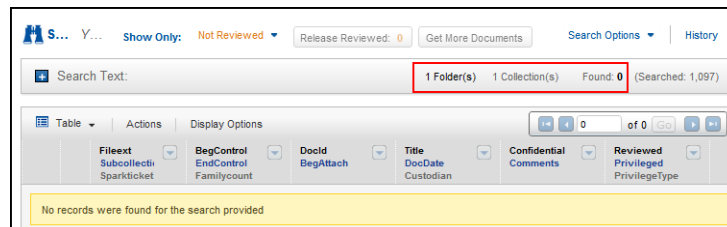
You can also run searches in your not reviewed documents or all the documents assigned to you in the stage by making the appropriate selection in the **Show Only** menu and creating your query in the same way.

The **Search Text** section of the **Results** page of your stage also allows you to select or clear search settings, folders and collections. Typically, it will be best practice to not limit the documents you display by these settings.

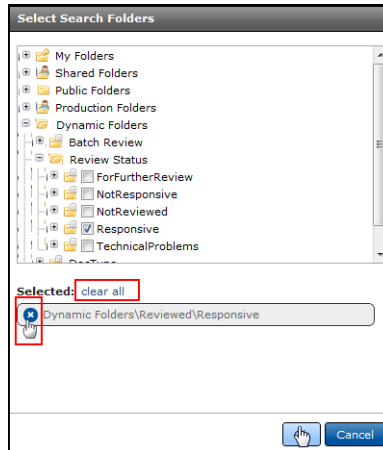


It is always important to be aware of any settings selections as you are working within your stage.

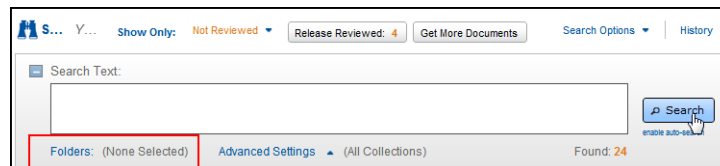
You may have rights to work in **Dynamic Folders** or other folders, and you may have access to more than one collection of documents. It is important to ensure you are not limiting your results or the documents you can assign yourself by these settings while working within your stage. When you display documents in a review project, Insight is running a virtual search to bring back those documents. Your settings, folders, and collections selections affect the search, and limit your access to documents. In the below image, no documents have appeared in the **Results**.



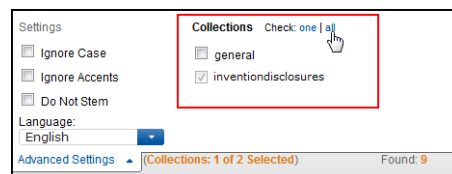
Expand the **Search Text** section and select **Folders**. Clear the selected folder or folders. Click the **OK** button.



Click the **Search** button to access the documents.



In most instances, you will want to ensure that 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

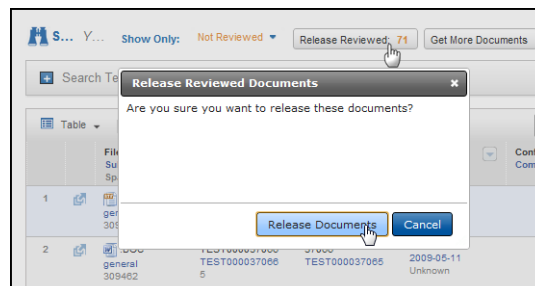
Review projects are automated to route documents based upon the needs of the matter. It is very important to release documents you've reviewed. These documents, once removed from your permissions, may remain in the stage until your review manager takes actions upon them or may move to other stages and 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.

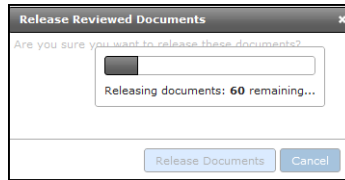
In addition to routing the documents appropriately releasing documents allows you to access and review more documents in the stage.

The **Release Reviewed** 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 their **Reviewed** status will not change again in this stage.

When ready, click **Release Reviewed** and then click **Release Documents**.



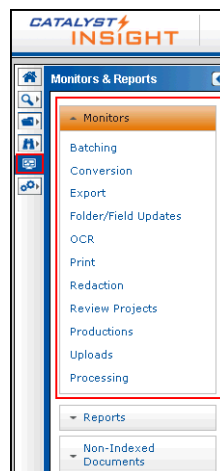
The system will display the release status.



If appropriate, you will now be able to access new documents by clicking the **Get More Documents** button. Remember that you will only be able to get the number of documents you've released.

Monitors

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.

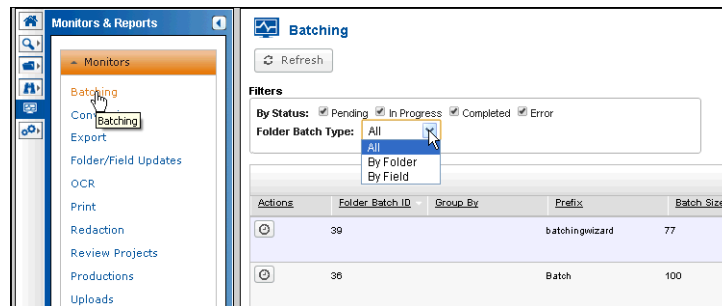
You may also have the rights to access documents that are not indexed and, therefore, the text is not searchable at **Non-Indexed Documents**.

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 Catalyst 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.

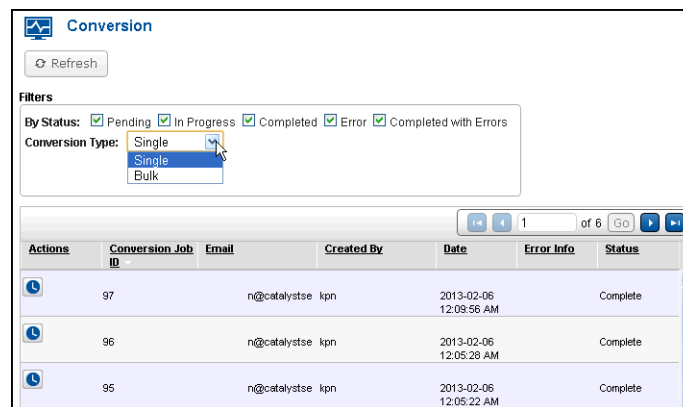
Buttons available in the **Action** column may include **Delete** (trash can) for pending or in progress jobs. The **Job State** button (clock) displays details of the job state. If your job produced an error, this is a good place to examine what went wrong. If the job failed, click the **Resubmit**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



Actions	Conversion Job ID	Email	Created By	Date	Error Info	Status
	97	n@catalystee kpn		2013-02-06 12:09:56 AM		Complete
	96	n@catalystee kpn		2013-02-06 12:05:28 AM		Complete
	95	n@catalystee kpn		2013-02-06 12:05:22 AM		Complete

The report displays information about the conversion jobs. The **Conversion Job ID** is a reference number and is useful for working with Catalyst 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.

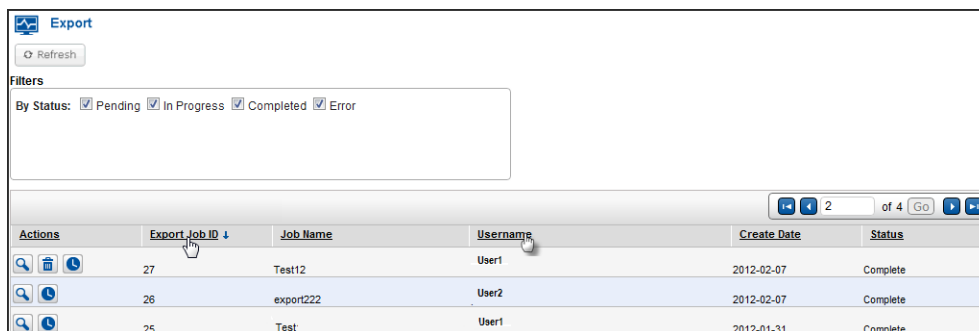
Export




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 Catalyst Support 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.



Actions	Export Job ID	Job Name	Username	Create Date	Status
	27	Test12	User1	2012-02-07	Complete
	26	export222	User2	2012-02-07	Complete
	25	Test	User1	2012-01-31	Complete

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. This 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 Catalyst 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.

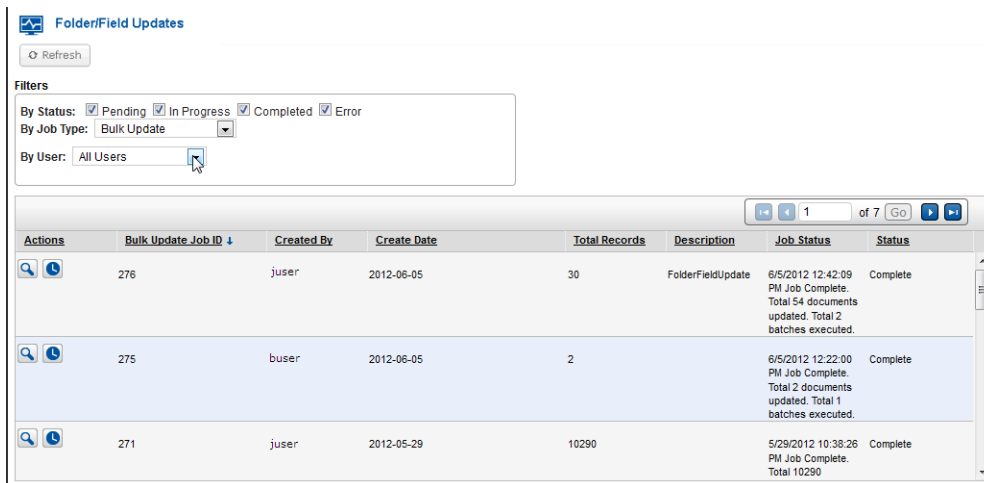
Status: Pending, In Progress, Completed or Error.

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.



Folder/Field Updates







Refresh

Filters

By Status: Pending In Progress Completed Error

By Job Type: Bulk Update

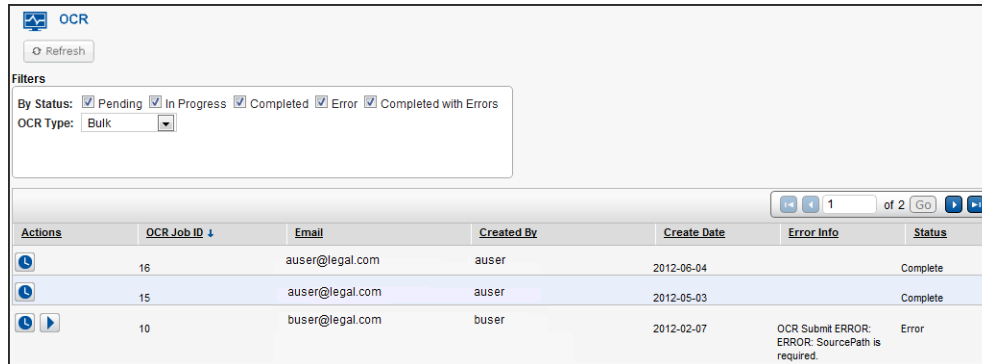
By User: All Users

Actions	Bulk Update Job ID	Created By	Create Date	Total Records	Description	Job Status	Status
 	276	juser	2012-06-05	30	FolderFieldUpdate	6/5/2012 12:42:09 PM Job Complete. Total 54 documents updated. Total 2 batches executed.	Complete
 	275	buser	2012-06-05	2		6/5/2012 12:22:00 PM Job Complete. Total 2 documents updated. Total 1 batches executed.	Complete
 	271	juser	2012-05-29	10290		5/29/2012 10:38:26 PM Job Complete. Total 10290	Complete

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 screenshot shows the OCR report interface. At the top, there is a 'Refresh' button. Below it, the 'Filters' section includes 'By Status' with checkboxes for Pending, In Progress, Completed, Error, and Completed with Errors, all of which are checked. The 'OCR Type' is set to 'Bulk'. Below the filters is a table with the following data:

Actions	OCR Job ID ↓	Email	Created By	Create Date	Error Info	Status
	16	auser@legal.com	auser	2012-06-04		Complete
	15	auser@legal.com	auser	2012-05-03		Complete
	10	buser@legal.com	buser	2012-02-07	OCR Submit ERROR: ERROR: SourcePath is required.	Error

The report shows information about the OCR jobs. The **OCR Job ID** is a reference number and is useful for working with Catalyst 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.

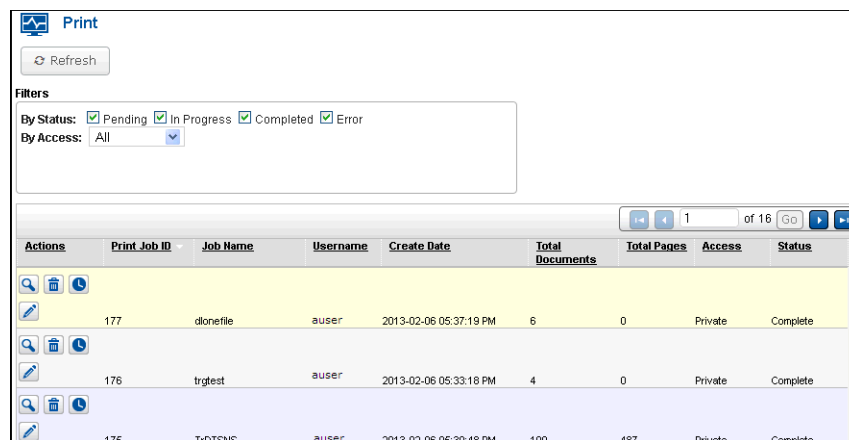
You can sort the results by clicking any of the column headings. Use the **Refresh** button at the top of the report to refresh the page when you are waiting for **Pending** jobs to finish.










Print

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 will see all print jobs on the site. 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.

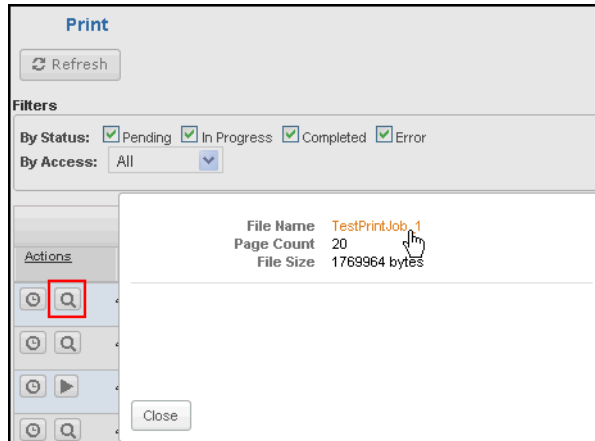
You can sort the jobs based upon the column headers in the report.



Actions	Print Job ID	Job Name	Username	Create Date	Total Documents	Total Pages	Access	Status
  	177	dlonefile	auser	2013-02-06 05:37:19 PM	6	0	Private	Complete
  	176	trgttest	auser	2013-02-06 05:33:18 PM	4	0	Private	Complete
  	175	TrPTSNS	auser	2013-02-06 05:30:48 PM	100	487	Private	Complete

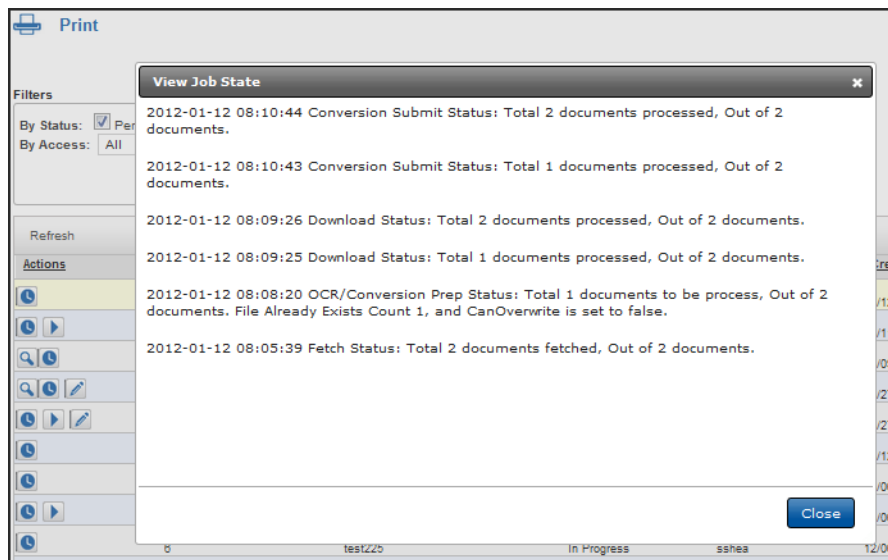
The **Print Job ID** is a reference number and is useful for working with Catalyst Support in troubleshooting jobs. **Job Name** is the name created for the job. **Username** and **Create Date** show who created the job and when. The **Total Documents** and **Total Pages** columns show how many documents 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.

		4	x1zip	2011-12-02	20	0	Private	Error
		Resubmit	Responsive	2011-12-02	20	0	Private	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**.

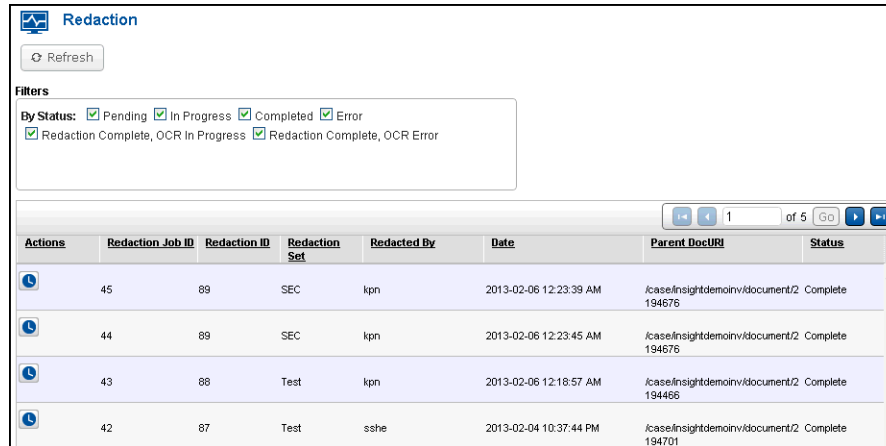
You can sort the results by clicking any of the column headings. Use the **Refresh** button at the top to refresh the page when you are waiting for **Pending** jobs to finish.

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.

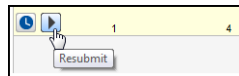
The **Redaction Job ID** is a reference number and is useful when working with Catalyst Support in troubleshooting jobs. **Redaction ID** is the identification number of the redacted document. **Redaction Set** is set that contains the redacted document. **Status** is the state that the redaction is 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.



Actions	Redaction Job ID	Redaction ID	Redaction Set	Redacted By	Date	Parent DocURI	Status
	45	89	SEC	kpn	2013-02-06 12:23:39 AM	/case/insightdemo/inv/document/2	Complete 194676
	44	89	SEC	kpn	2013-02-06 12:23:45 AM	/case/insightdemo/inv/document/2	Complete 194676
	43	88	Test	kpn	2013-02-06 12:18:57 AM	/case/insightdemo/inv/document/2	Complete 194466
	42	87	Test	sshe	2013-02-04 10:37:44 PM	/case/insightdemo/inv/document/2	Complete 194701

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



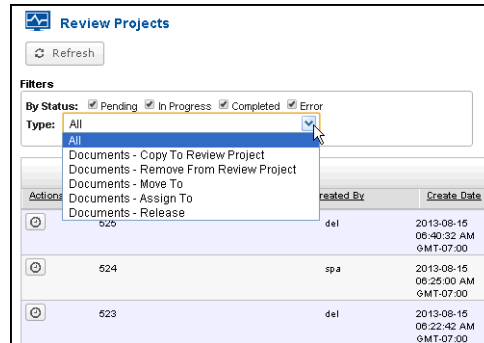
You can sort the results by clicking any of the column headings. Use the **Refresh** button at the top to refresh the page when you are waiting for **Pending** jobs to finish.

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 Catalyst 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.

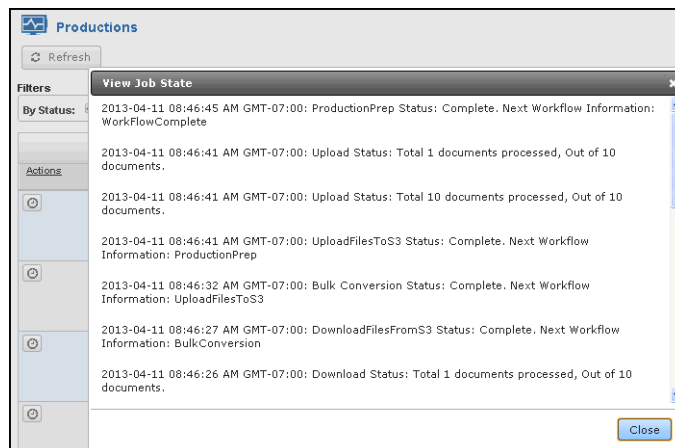


Actions	Production ID	Production Name	Comments	Email	Redaction Set	Create Date	Due Date	Error Info	Status
	107	SYI	UNC	yi@catalystsecure.com		2013-07-18 08:02:03 AM GMT-07:00		Production complete: 10 of 10 documents, 135 of 135 pages complete	Complete

The **Production ID** is a reference number and is useful when working with Catalyst 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.



View Job State

- 2013-04-11 08:46:45 AM GMT-07:00: ProductionPrep Status: Complete. Next Workflow Information: WorkFlowComplete
- 2013-04-11 08:46:41 AM GMT-07:00: Upload Status: Total 1 documents processed, Out of 10 documents.
- 2013-04-11 08:46:41 AM GMT-07:00: Upload Status: Total 10 documents processed, Out of 10 documents.
- 2013-04-11 08:46:41 AM GMT-07:00: UploadFilesToS3 Status: Complete. Next Workflow Information: ProductionPrep
- 2013-04-11 08:46:32 AM GMT-07:00: Bulk Conversion Status: Complete. Next Workflow Information: UploadFilesToS3
- 2013-04-11 08:46:27 AM GMT-07:00: DownloadFilesFromS3 Status: Complete. Next Workflow Information: BulkConversion
- 2013-04-11 08:46:26 AM GMT-07:00: Download Status: Total 1 documents processed, Out of 10 documents.


Close

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.

 Uploads
Refresh

1 of 122
Go
Next

Ticket #	Date	Custodian(s)	Collection	BegControl	EndControl	Count
356660	2013-01-24 02:31:19 PM More Patents	morepatents		PATS003948354	PATS003950648	2295
356659	2013-01-24 02:32:04 PM More Patents	morepatents		PATS003936354	PATS003948353	10000
356658	2013-01-24 02:29:06 PM More Patents	morepatents		PATS003936303	PATS003938353	2051
356657	2013-01-24 02:29:20 PM More Patents	morepatents		PATS003926303	PATS003936302	10000
356656	2013-01-24 02:27:00 PM More Patents	morepatents		PATS003924292	PATS003926302	2011
356655	2013-01-24 02:27:45 PM More Patents	morepatents		PATS003914292	PATS003924291	10000
356653	2013-01-24 02:36:17 PM More Patents	morepatents		PATS003752073	PATS003754291	2219
356651	2013-01-24 02:26:08 PM More Patents	morepatents		PATS003904292	PATS003914291	10000
356650	2013-01-24 02:22:18 PM More Patents	morepatents		PATS003719741	PATS003722072	2332
356649	2013-01-24 02:23:23 PM More Patents	morepatents		PATS003894292	PATS003904291	10000

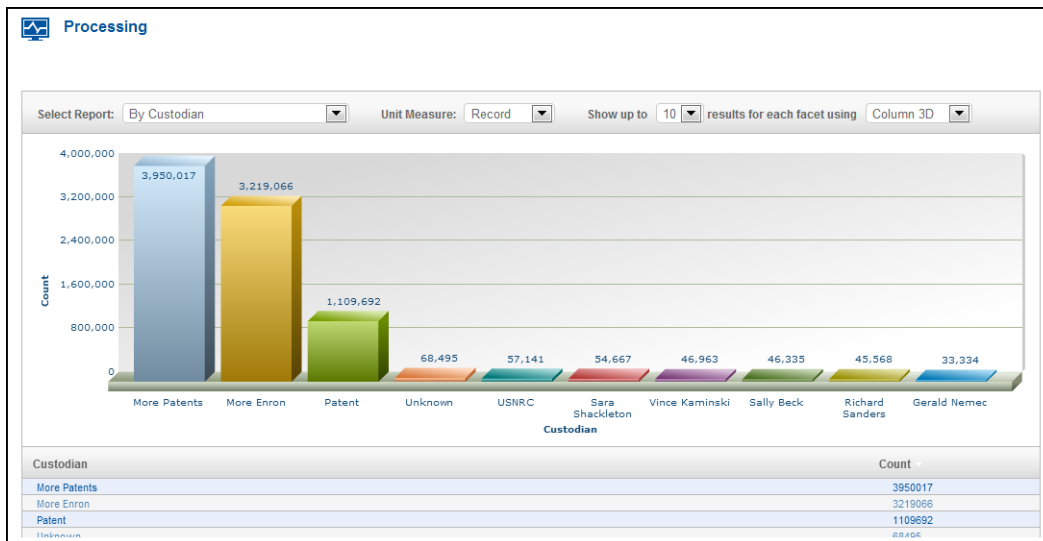


In order for the log of uploads to display, the **TicketNumber** field on your site must have a facet built upon it.

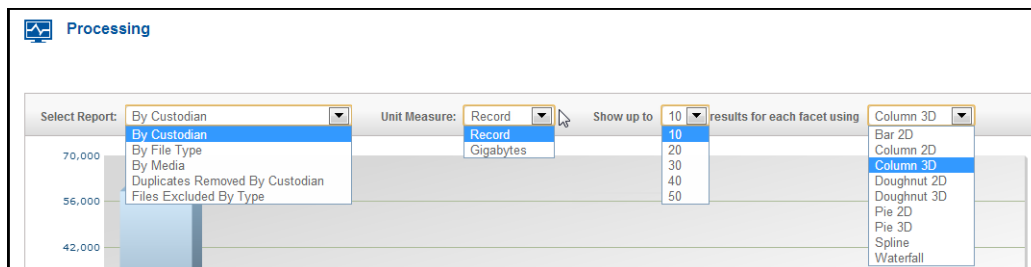
Processing

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**.



- **Native Document located but doctext was not retrievable:** This category means that the text of the record was missing. This may be due to the document containing no text, because it is an image document that has not gone through an OCR process. It may also be a document that cannot be OCRed because it has no text, like a photograph.
- **File does not exist or there are formatting errors:** This error may occur when a document is missing, but there is a document record. It could also be that the formatting of the document produced errors in the indexing process.
- **System error - timeout or insufficient memory:** This error can occur because the file is too big for indexing.
- **Uncategorized error:** This error can be due to any other problem with the document indexing than those listed above.
- **Non-Indexed docs:** This link will bring back all errored documents no matter the reason.

Click any of the links, and the search will run, taking you to the **Results** page with the documents retrieved.