



User Guide

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Main Doc Review Layout

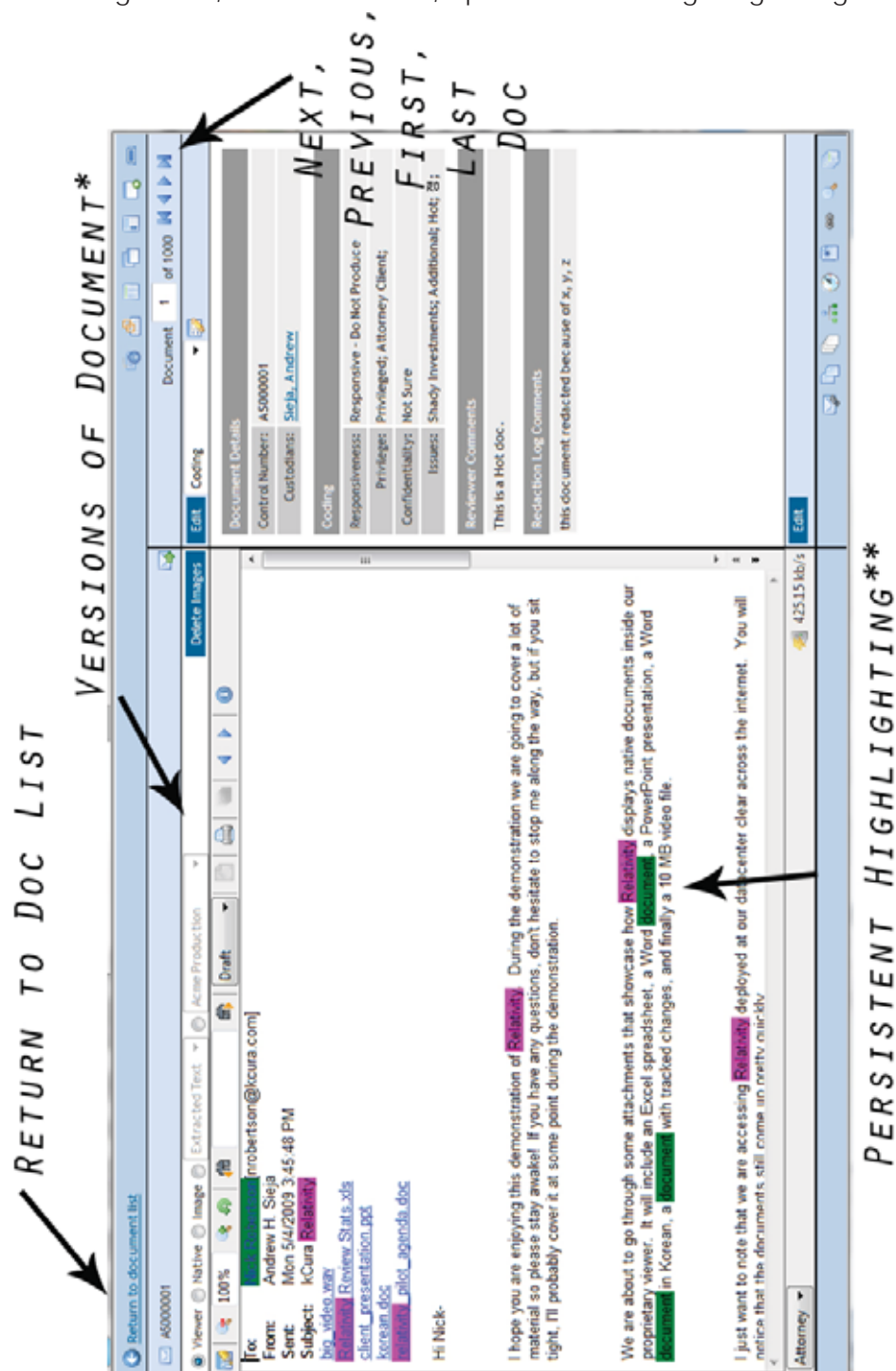
The screenshot displays the Main Doc Review Layout interface. Annotations with arrows point to specific features:

- TABS**: Points to the top navigation bar containing tabs for Documents, Reports, Batches, and Admin Options.
- SEARCH**: Points to the search bar at the top right of the interface.
- FOLDER STRUCTURE**: Points to the left sidebar showing a tree view of folders including Salt vs. Pepper, Admin Staging, Curators, File Servers, Foreign Documents, Scanned Documents, and Transcripts.
- TOTAL # OF DOCS**: Points to the bottom right status bar indicating the total number of documents.

The main content area shows a table of document items with columns for Document ID, Name, Date, Status, and Actions. The table lists various documents such as 'Korea Testimony', 'Relativity Review', 'client_presentation', 'Relativity_gmt', 'big_video.wav', 'Boonberg Power Lines Report', and 'December 14, 2000 - Bear Stearns'.

Core Review Interface Layout

Navigation, Doc Version, persistent Highlighting



*Versions of Document: This is where you can view the Viewer, native, image, or produced image of the document. All versions of the document are stored in one central location for easy access.

**Persistent Highlighting: We can highlight any terms within your database for automatic, easy reference. Color combinations are custom and/or optional.

Core Review Interface Layout

Personal Preferences, Coding Layout, Related Items Pane

PERSONAL PREFERENCES

The screenshot displays the Core Review Interface with three main sections:

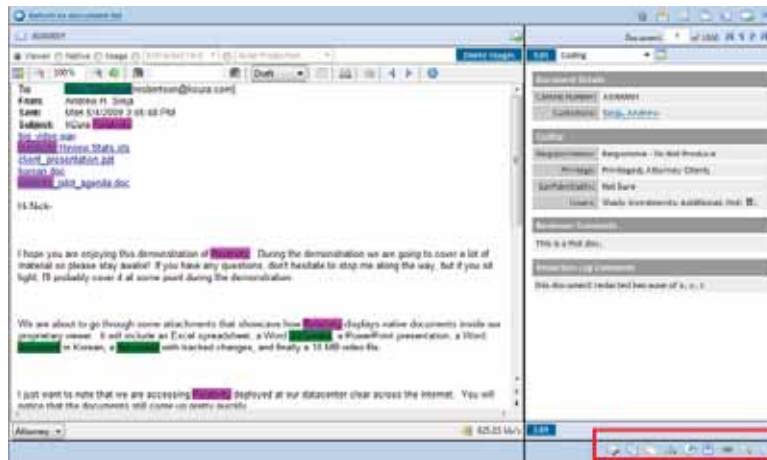
- PERSONAL PREFERENCES:** Located on the left, it includes a toolbar with icons for document management and a sidebar with tabs for 'Return to document list', 'Viewer', 'Native', 'Image', 'Extracted Text', 'Acme Production', 'Draft', and 'Delete Images'.
- CODING FORM:** The central area, labeled 'CODING FORM' with a large arrow, contains a document viewer showing an email from Andrew H. Sieja to kCura. The email content includes a subject line 'kCura Relativity', a body with a link to 'big_video.wav', and a signature block for 'Hi Nick-'. Below the email content is a 'Coding' section with a table of review items.
- RELATED ITEMS PANE:** Located on the right, it displays a list of related items, including 'Attorney' and 'big_video.wav'.

The interface also features a top toolbar with icons for document management and a sidebar with tabs for 'Document', 'Edit', 'Coding', and 'Form'.

RELATED ITEMS PANE

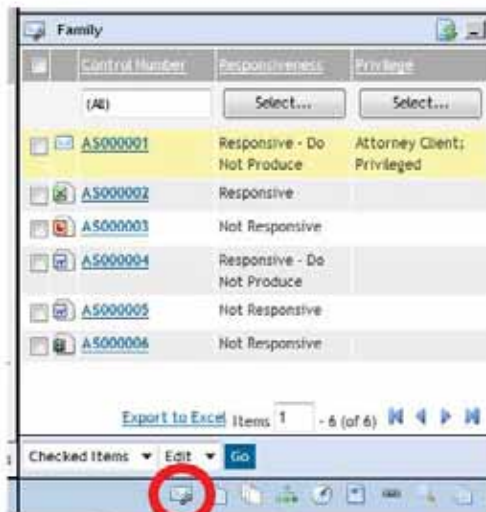


Related Items Pane

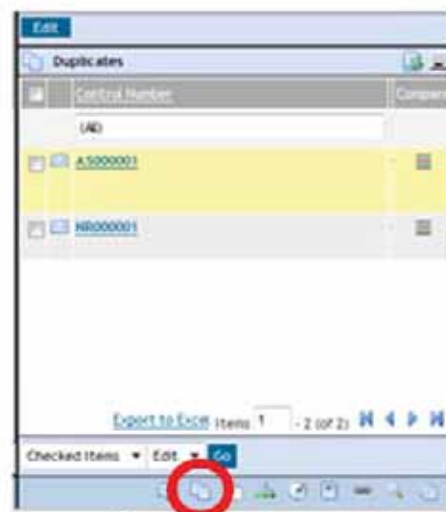


Related Items Pane on Bottom Right

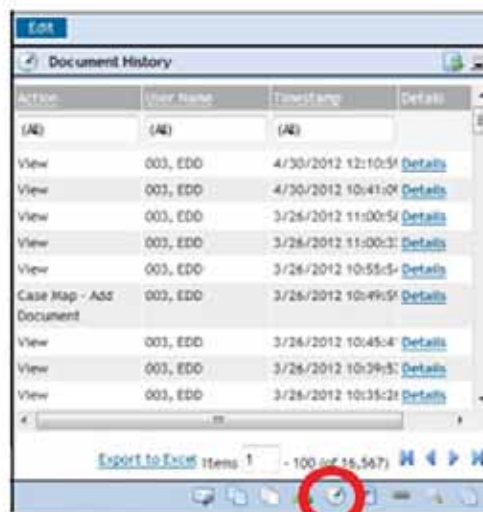
Related Items pane helps review team understand a certain document's relationship to other documents in the database.



FAMILY GROUP

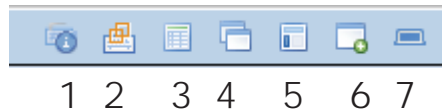
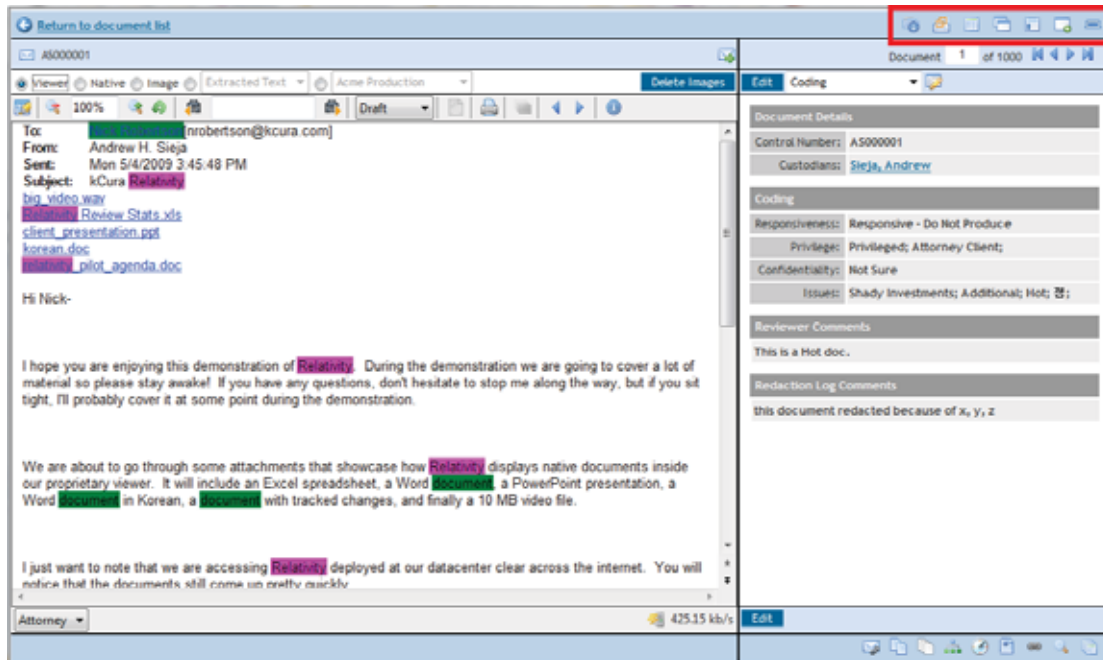









DUPLICATES



DOCUMENT HISTORY

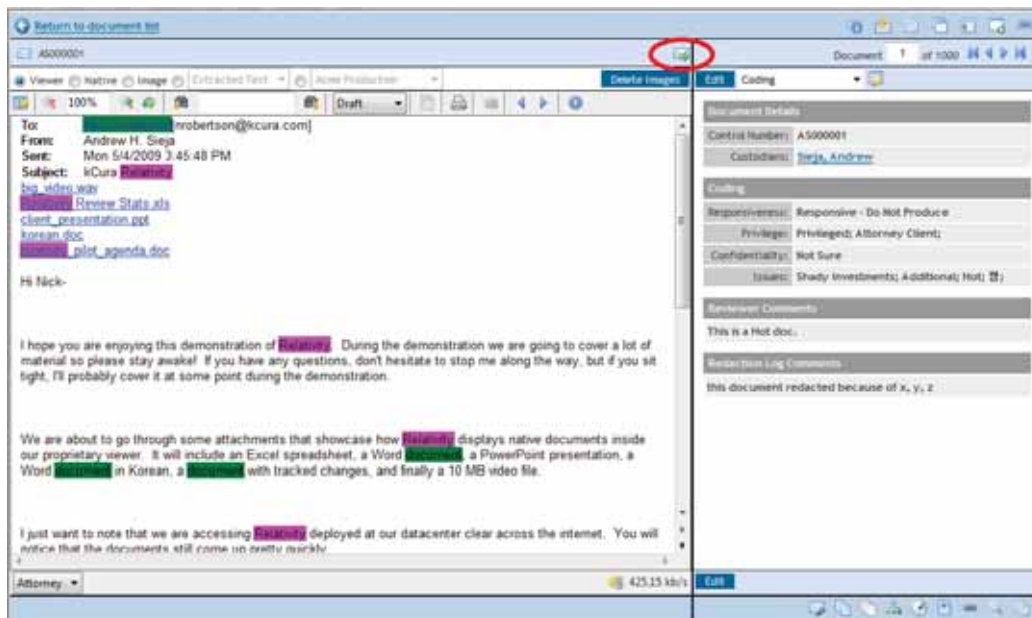
Personal Viewer Preferences



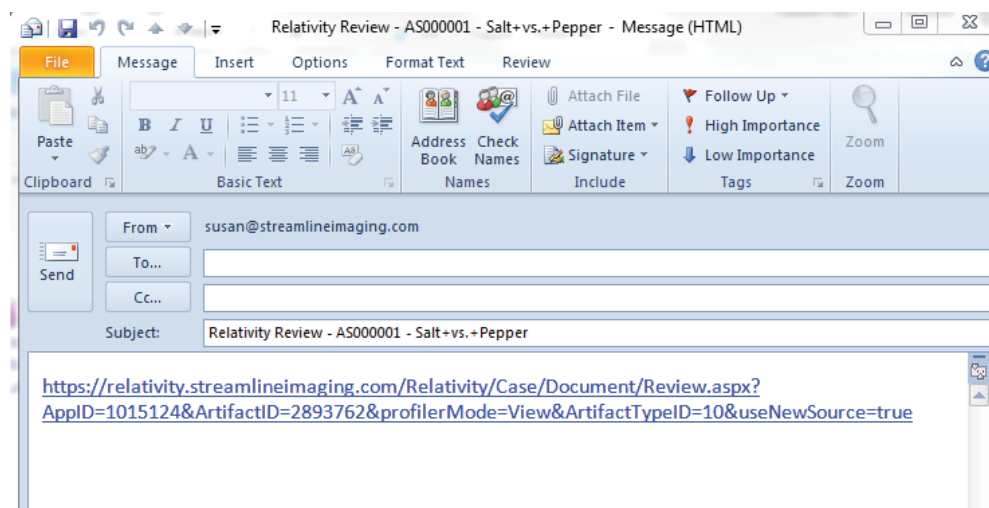
1.  Displays Keyboard Shortcuts Legend
2.  Enables/Disables Keyboard Shortcuts
3.  Displays the Main Document List above the Core Review Interface
4.  Undocks the Viewer for dual monitor review
5.  Swaps the coding layout to the left side (returns to the right when you click it again)
6.  Launches the Stand Alone Viewer so that you can compare the current document to another
7.  Displays the Tabs from the Main Document List at the top of your screen

Emailing Documents within the Review Team

Sometimes it's helpful to have someone else on the review team look at a document. You may have a question or just want to show someone else an important document that you've found. Relativity has a built in collaboration tool. When the other party receives the link in their email, it will open right up to that document once they have logged into Relativity. The other person will need to have access to Relativity, the case you are working on, and the necessary permissions to view the document in question. The collaboration tool is within the Core Review Interface.

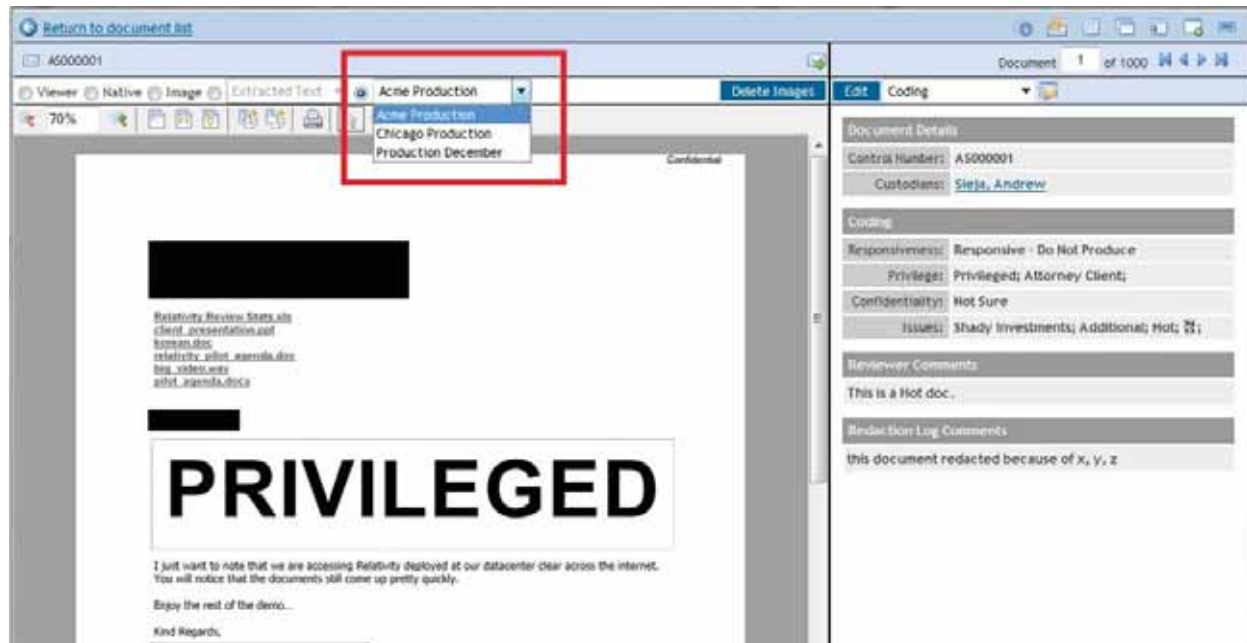


Your email will look like this:



Viewing Produced Documents

If a document has been produced, the produced version of the document will be stored with the unproduced document. To switch to the produced view, click on the Production radio button and select the desired production. There is no need to have multiple databases for productions in Relativity as they are all stored in one central place.



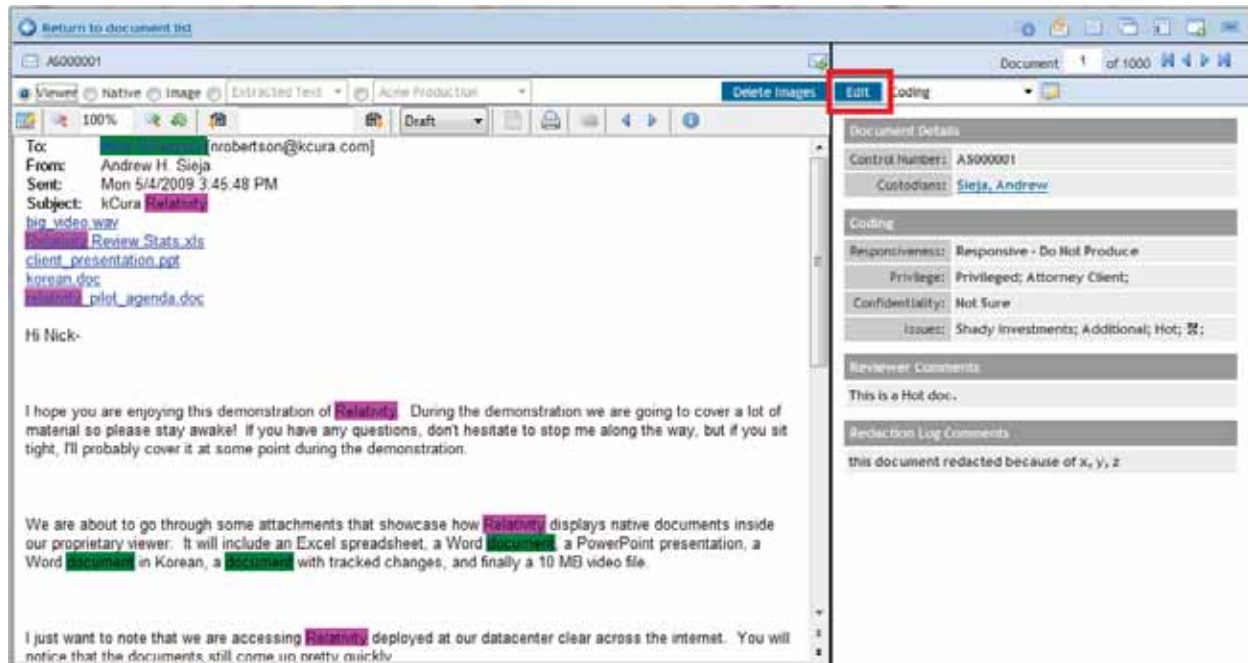
As another easy reference, the Related Items pane displays how many times the document has been produced and lists the productions

The screenshot shows the 'Production History' table in the Relativity interface. The table has four columns: Name, Date Produced, Beg Bates, and End Bates. It lists three productions: 'Acme Production' (9/8/2008, ACME 00080, ACME 000), 'Chicago Production' (6/19/2009, CHICAGO 00001, CHICAGO), and 'Production December' (12/18/2009, PROD DEC 0000001, PROD DEC). The table is displayed in a window with a toolbar at the bottom, including an 'Export to Excel' button and a red circle around the 'Items' button.

Name	Date Produced	Beg Bates	End Bates
Acme Production	9/8/2008	ACME 00080	ACME 000
Chicago Production	6/19/2009	CHICAGO 00001	CHICAGO
Production December	12/18/2009	PROD DEC 0000001	PROD DEC

Editing/Coding Documents

When you are ready to code a document, Click on the blue Edit button at the top of your coding layout.

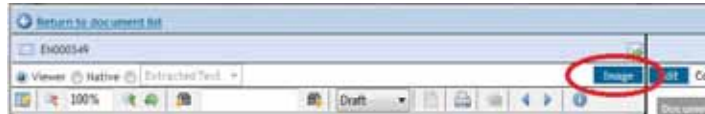


Make the necessary coding decisions (Orange indicates a required field), and click Save & Next. This will prevent you from having to click Edit again on the next document and will leave the coding form open for edits.

The screenshot shows the coding form interface. The top navigation bar includes 'Save', 'Save & Next' (highlighted with a red circle), and 'Cancel' buttons. The 'Document' tab is selected, showing 'Document 1 of 1000'. The 'Coding' section is active, displaying 'Document Details' for Control Number AS000001 and Custodian Sieja, Andrew. The 'Coding' section includes 'Responsiveness' (with 'Responsive - Do Not Produce' selected) and 'Privilege' (with 'Privileged' and 'Attorney Client' selected). The 'Add' button is visible at the bottom of the coding section.

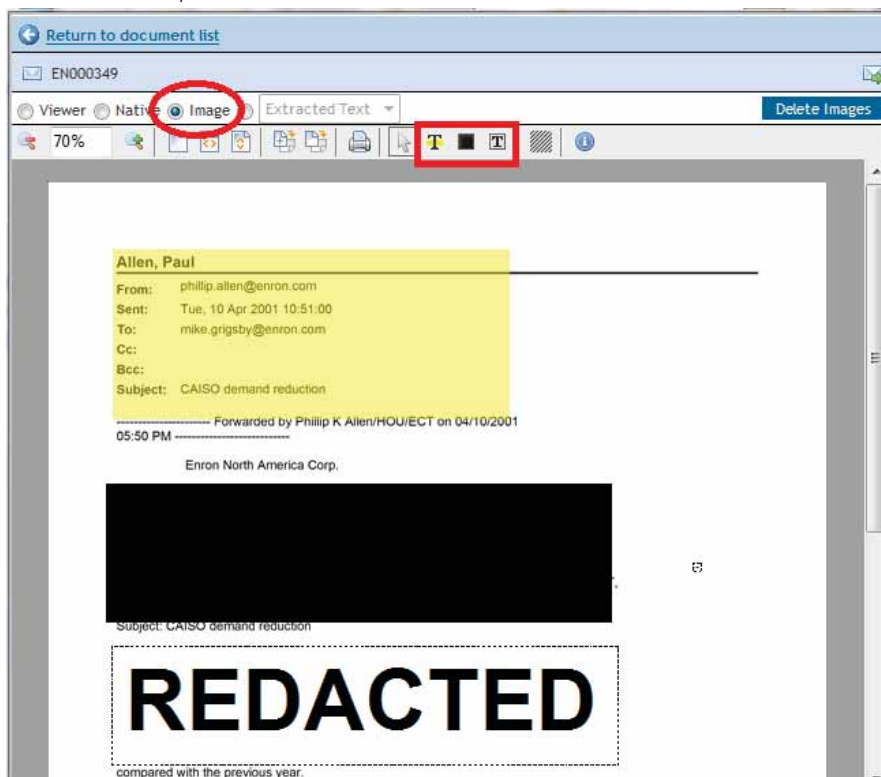
Making Redactions

In order to make redactions on a document, there needs to be an Image of the document in the system. There are two ways we can image a document. The first is to "tiff-on-the-fly" within Relativity. This is fine for basic documents.



If you are redacting Word documents with tracked changes or Excels, we prefer to image the documents outside of Relativity and import them in. we can provide a "Redact" button during the scope of your review, image the selected documents, and then you can redact all necessary records at once.

To Redact, click on the Image Radio Button. You can highlight, draw a black box, or a text box redaction over the text.



Use the Change Markup Visibility button to make your redactions transparent for easy QC.



Keyboard Shortcuts

Shortcuts will only execute in the Core Review Interface. Shortcuts can be edited and customized for existing and new coding fields.

Keyboard Shortcut	Action
Alt+Down Arrow	Next Annotation
Alt+E	Switch to Long Text Mode
Alt+End	Last Document
Alt+Enter	Save and Next
Alt+Home	First Document
Alt+I	Switch to Image Mode
Alt+Left Arrow	Page Up/Previous Image
Alt+M	Toggle Modes (Draft/Normal/Preview)
Alt+N	Switch to Native Mode
Alt+P	Switch to Productions Mode
Alt+Page Down	Next Document
Alt+Page Up	Previous Document
Alt+Right Arrow	Page Down/Next Image
Alt+S	Save
Alt+Shift+Z	Copy From Previous
Alt+Space	Edit
Alt+Up Arrow	Previous Annotation
Alt+V	Switch to Viewer Mode
Alt+Z	Cancel
Ctrl+A	Select All
Ctrl+C	Copy
Ctrl+F	Find
Ctrl+P	Print
Ctrl+Shift+T	Reopen Last Tab
Ctrl+T	New Tab
Ctrl+V	Paste
Ctrl+X	Cut

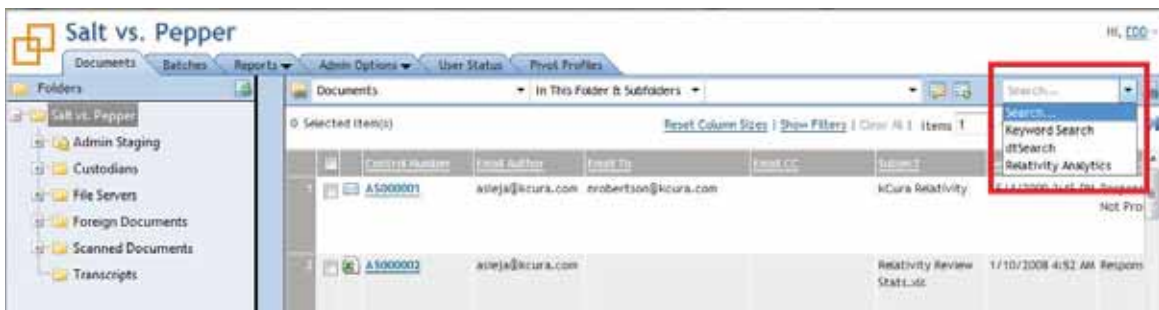


Searching & Filtering

Use the search drop-down on the top right of the Main Document List to select your search engine.

- Keyword Search: good for basic searching (see page 15)
- dtSearch: Use for anything more advanced (proximity searching, wildcards, Fuzzy words, etc. See page 15)
- Analytics: Concept Searching & Keyword Expansion (see Analytics, pg. 26)

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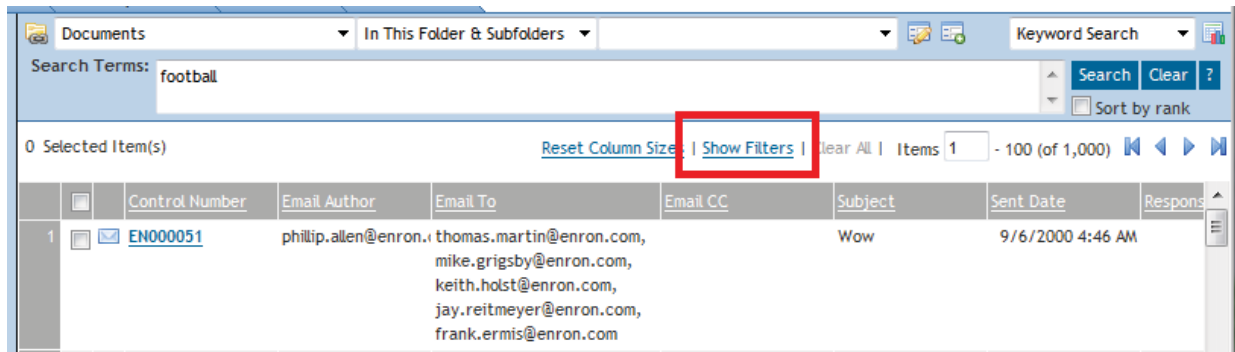


Type your search into the text box and press Enter or click the "Search" button.

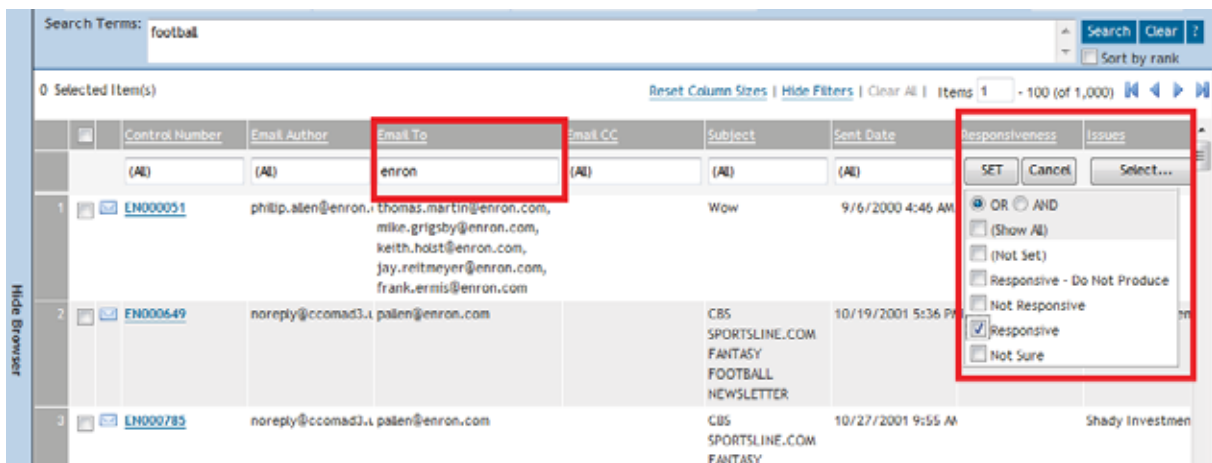


Filtering

To further filter, click on the "Show Filters" link.



The columns will now have text boxes or filters where you can search within the metadata fields. Just type in the box and press Enter. You can also filter within work product.



Keyword Syntax

Search	Returns
Wired	The word "wired"
Wired magazine	The words wired AND magazine
Wired AND magazine	The words wired AND magazine
Wired OR magazine	The word wired OR the word magazine
Wired, magazine	The word wired OR the word magazine
"wired magazine"	The exact phrase "wired magazine"
Wired NOT magazine	The word wired and NOT the word magazine Note: searches cannot be started with the word "not", ex. not wired "Not" cannot be used with "OR" ex. wired OR NOT magazine
Wire*	Any words beginning with wire (ex. wired, wires, wireless)
Computer AND (wired OR magazine)	The word computer AND the word wired OR The word computer AND the word Magazine

dtSearch Syntax

Operators

Search String	Returns Documents with:
Apple pear	The exact phrase "Apple pear"
Apple AND pear	The word apple AND the word Pear
"Apple Pear"	The exact phrase "Apple Pear"
Apple OR Pear	Either Apple or Pear
Apple w/5 Pear	Apple appears within 5 words of pear
Apple pre/5 pear	Apple appears within 5 words before pear
Apple not w/5 pear	Apple does not appear within 5 words of pear
Apple AND NOT pear	Apple appears but pear does not
Apple w/5 xfirstword	Apple appears in the first 5 words of the document
Apple w/5 xlastword	Apple appears in the last 5 words of the document



dtSearch Syntax Cont' d

Special Characters

Character	Function
?	Matches any single character
=	Matches any single Digit
*	Matches any number or characters
%	Fuzzy Searching
~	Stemming

Examples

Character	Function
appl?	Matches apply and apple, but not apples
N===	Matches N123, but not N1234 or Nabc
appl*	Matches apple, application, etc.
cipl	Matches principle, participle, etc.
Ap*ed	Matches applied, approved, etc.
Apply~	Matches apply, applied, applies, etc.

Fuzzy Searching

Fuzzy searching is used to find a word even if it's misspelled.

Fuzzy searching is useful when searching for text that may contain typographical errors or for text that has been OCR'ed from scanned images.

You can search for a single term with the fuzzy operator (ex. apply%), or you can select the amount of fuzziness within the dictionary or saved search.

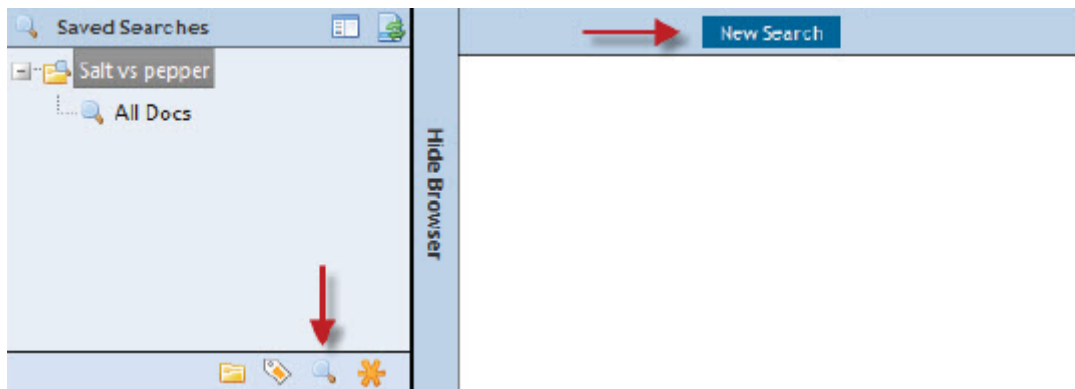


Advanced & Saved Searches

Advanced and Saved searches can be a convenient way to create complex searches for repeat use. When creating a search, it can be made either Public or Private, run on the fly, or saved for later use. Note that when you save a search, the search definitions are saved, not the results. Each time you click on a search it is executed in real time returning all data that currently meets your criteria.

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To access the advanced and saved searches, click on the magnifying glass on the bottom left of your screen and click the "New Search" button.



Information

Name: The name of the saved search

Includes: Allows you to return not only the hit documents, but also documents related to any hit documents (ex. select "Include Family" to include any attachments or parents of hit documents. Using this setting, the family would not need to meet the criteria for the search.)

Scope: Allows you to select the set of documents to be searched

- **Entire case** will search all documents in the database
- **Select Folders** is used to choose folders you would like to search. (Note the Include Sub-Folders checkbox. Include Sub-folders will be checked by default. Uncheck the box if you'd like to search the selected folder(s) only, and no sub-folders).

Requires Manual Rerun: Select this option if you want users to rerun a saved search when they return to it after navigating to other features in Relativity. This option ensures that users are always seeing the up-to-date search results.

Search Conditions

Requires Manual Rerun: ☐

Search Conditions:

Search With: **Keyword Search** ?

Search Text:

Sort By Rank: ☐

Conditions:

	Field	Operator	Value
-	Select	-	-

Search With: Choose the search engine you would like to use for your search, if applicable.

Search Text: Add search terms or phrases

Sort by Rank: can be used to return results in order of relevance, with the most relevant documents at the top.

Conditions

Sort By Rank: ☐

Conditions:

	Field	Operator	Value		
	FileName	is	summary		AND
	Responsiveness	any of these	Responsive; Responsive - Do Not Produce		
	Select...	is			
	Select...	is			
	Select...	is			

The conditions section allows you to include specific fields in your Advanced or saved search. Each row of the conditions represents a separate criterion that you can connect with AND/OR Operators.

- The first box allows you to select single, double, or triple parentheses, creating complex levels of grouping between different criteria.
- **Field:** Select any field in the case
- **Operator:** Select your search operator. Available operators differ depending on the type of field being searched (see below).
- **Value:** Enter the value to be searched
- The fifth box is for closing any parentheses opened in the first box
- Select the connection of AND/OR between criteria

Operators

Operator	Returns Documents Where:
Is like	The entered term is present in the field in whole or in part (no wildcard needed).
Is not like	The entered term is not present in the field
Is	The entered term is equal to the field value
Is Not	The entered term is not equal to the field value
Is Set	The field is not empty
Is not set	The field is empty
Is less than	The field value is less than the entered term
Is greater than	The field value is greater than the entered term
Contains	The entered term is present in the field. Allows the AND/OR operator and wildcards at the end of the search
Does not contain	The entered term is not present in the field

Fields

The 'Fields' control interface consists of a top section with a 'Select...' dropdown and an 'is' dropdown. Below this is a 'Fields (Required):' section, which is highlighted with a red border. This section contains two lists: a list of available fields on the left and a list of selected fields on the right. The available fields include: Doc ID End, Doc ID End Attach, DOCID, Document Description, Document Extension, Document Subject, Duplicate, Email Author, Email BCC, Email Body, Email CC, Email Subject, Email To, Embedded Data Info, End Attachment, ENDDOC, Example, and Example2. The selected fields include: Edit, File Icon, Control Number, and FileName. Between the two lists are four buttons: '>>', '>', '<', and '<<'. To the right of the selected fields list are two buttons: '^' and 'v'. At the bottom of the 'Fields (Required):' section is a 'Sort:' section.

The fields control what columns you see when your search results are displayed. All available fields are on the left and the selected fields are on the right. You can double click a field to move it to the opposite side. Fields/Columns are displayed according to their order on the right. The top field will be the first field in your display, moving from left to right. To reorder the fields, use the up and down arrows on the far right.

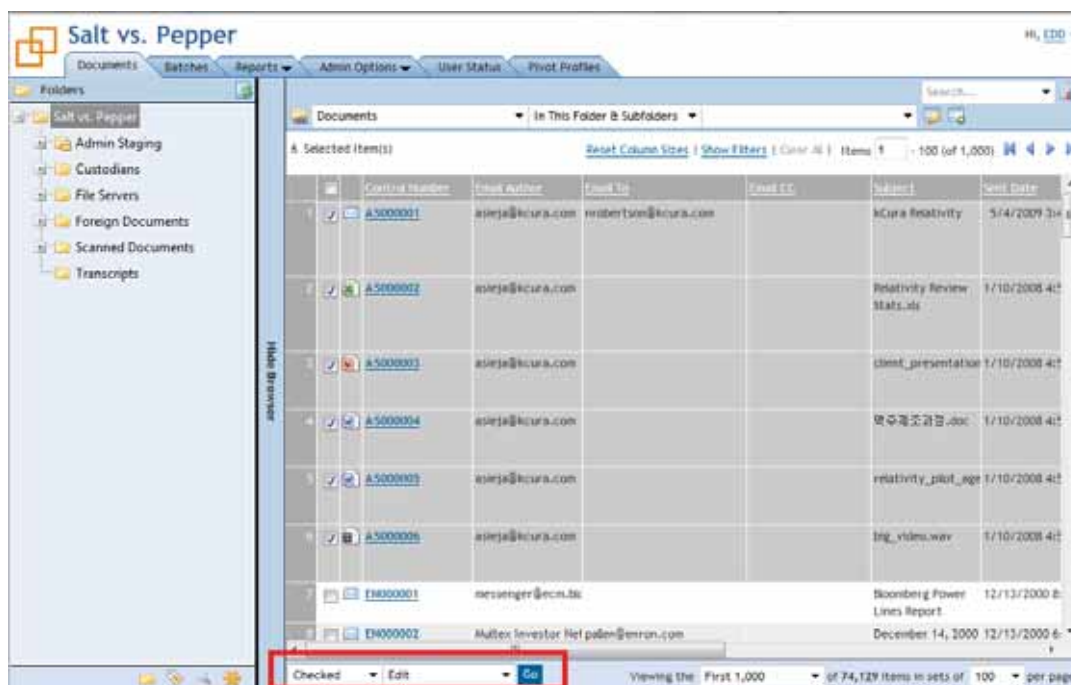
Sort

The 'Sort' control interface consists of a 'Sort:' section, which is highlighted with a red border. This section contains a list of fields to sort by and a dropdown menu to select the sort order. The fields are: Doc ID End, Doc ID End Attach, DOCID, Document Description, Document Extension, Document Subject, Duplicate, Email Author, Email BCC, Email Body, Email CC, Email Subject, Email To, Embedded Data Info, End Attachment, ENDDOC, Example, and Example2. The sort order dropdown menu is set to 'Ascending'. Below the 'Sort:' section is an 'Other' section.

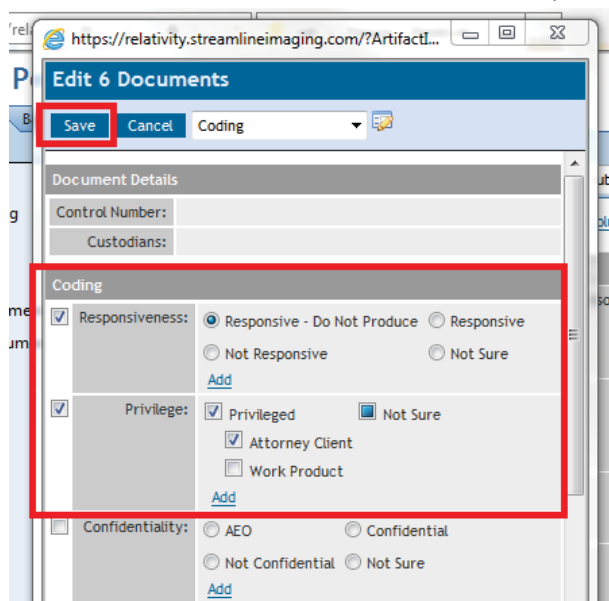
Define the sort order by choosing a field to sort by and determining whether it should be in ascending or descending order.

Mass Tagging Documents

To mass code documents from the main document view, select the records you would like to code. On the bottom of your screen, there are two drop downs. The first says "checked", and the second should default to "Edit". Click "Go".

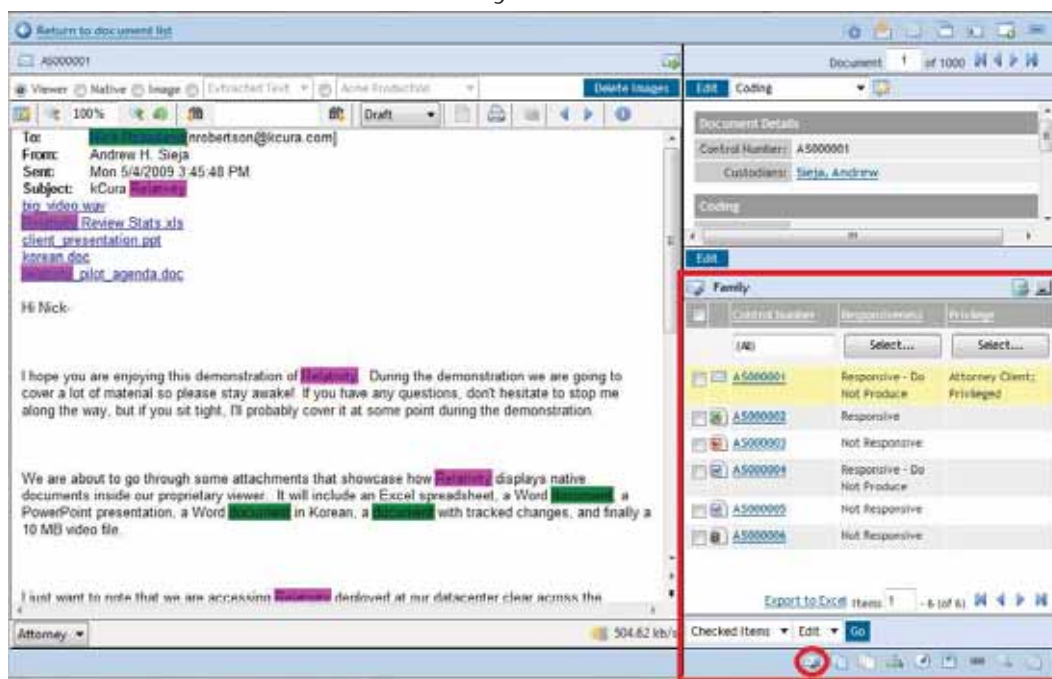


Once you select, "Go", a pop-up will appear with your coding layout. The important thing to note is that you need to make your coding choice in addition to checking the box next to the field you are coding. Be sure to hit "Save" at the top of the box.

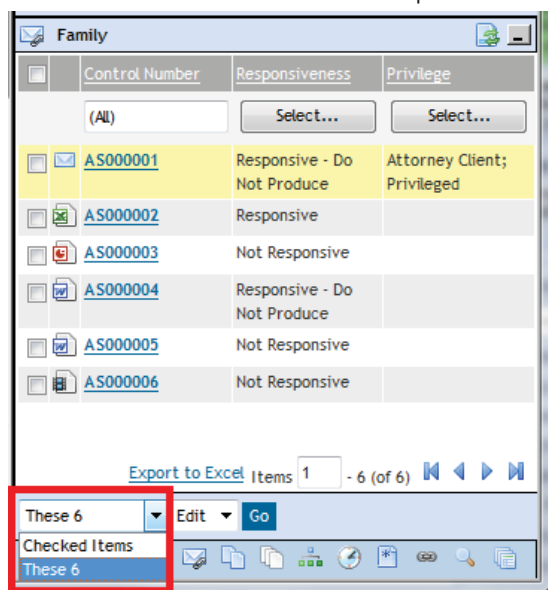


Mass Tagging Documents Cont'd

You can also mass code documents from within the Core Review Interface. Let's say you would like to tag a whole family group of documents as Responsive. Use the Related Items Pane to display all family members.



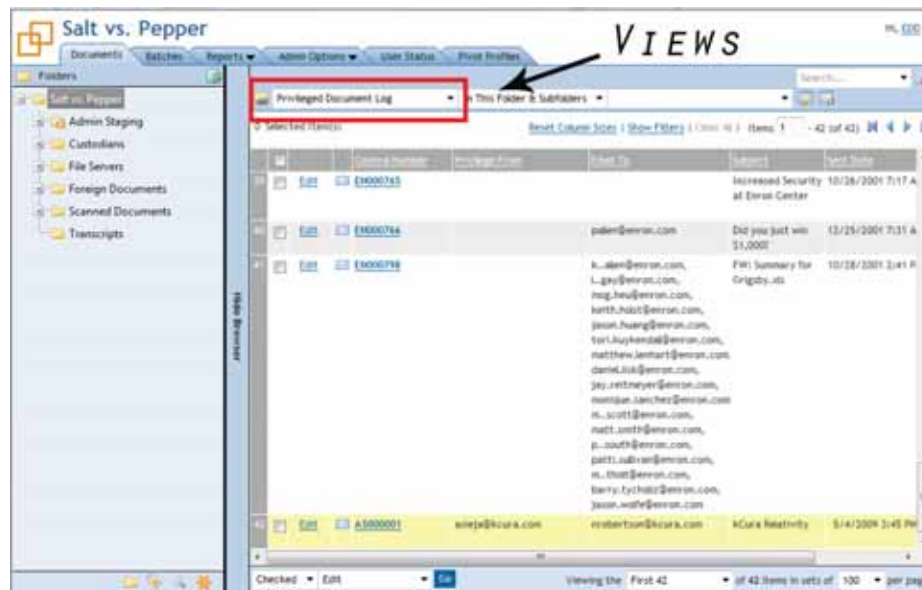
You can either check the boxes next to each document, or choose all items in the first drop down.



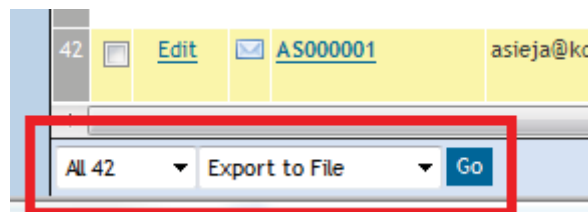
Select "Go", and your coding layout will appear in a pop-up. Follow the same instructions for mass coding on the main document screen.

Exporting a Privilege Log (Or List of Documents)

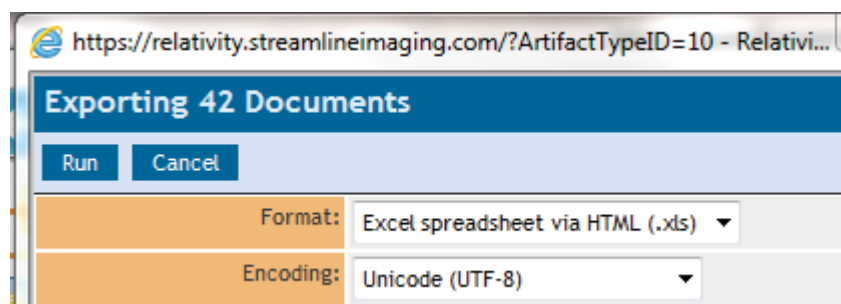
From the Main document list, you can either filter for your privileged documents or use a View to automatically display all privileged records.



From your bottom drop-downs, select "All ___" in the first box and "Export to File" in the second box and select "Go."



A pop-up will appear with your Export options. You can leave these at their default choices and select "Run".



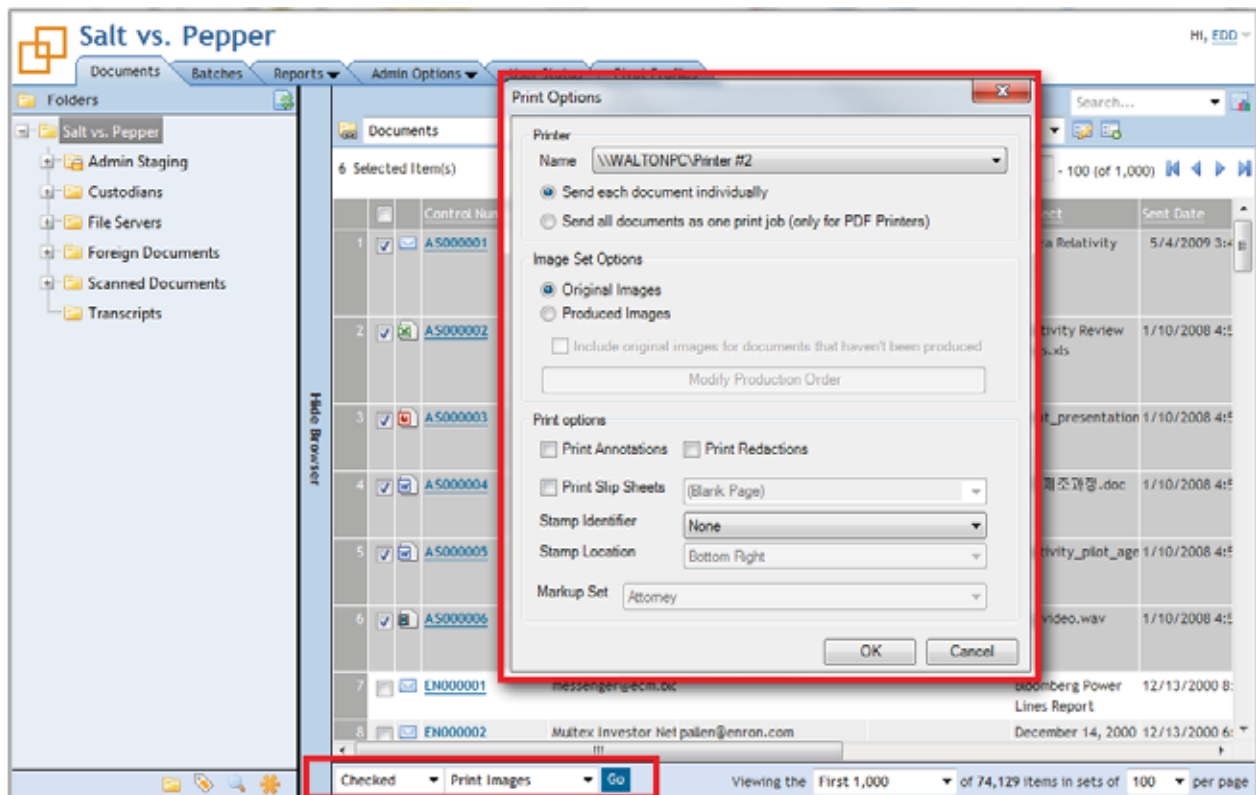
You will be prompted by Internet Explorer to either Open or Save the Excel. The Excel will be interactive and you will be able to filter much like within Relativity from the column headers.

Printing Documents

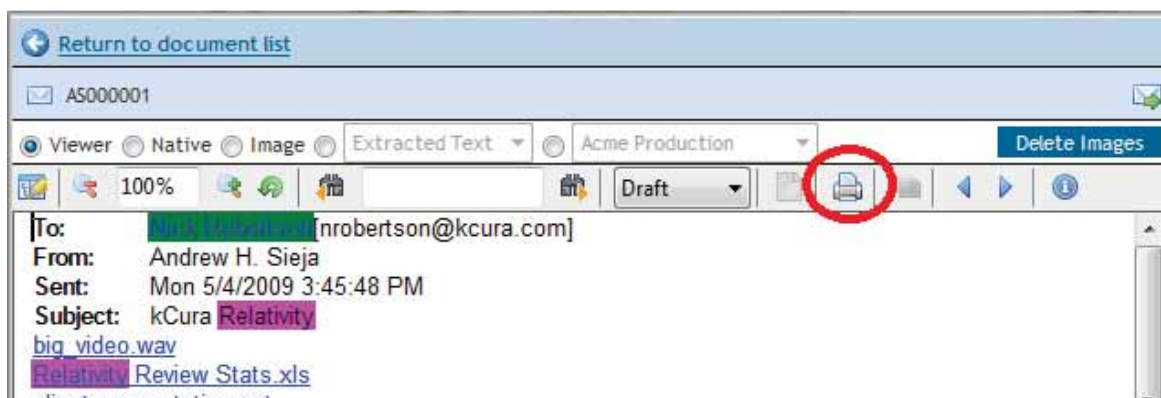
You can print from two different locations within Relativity: within a document, and from the main document list. If you are printing from the main document list and want to print multiple records at the same time, the documents need to have tiff images associated with the document. From within the Core Review Interface, you may print the native document.

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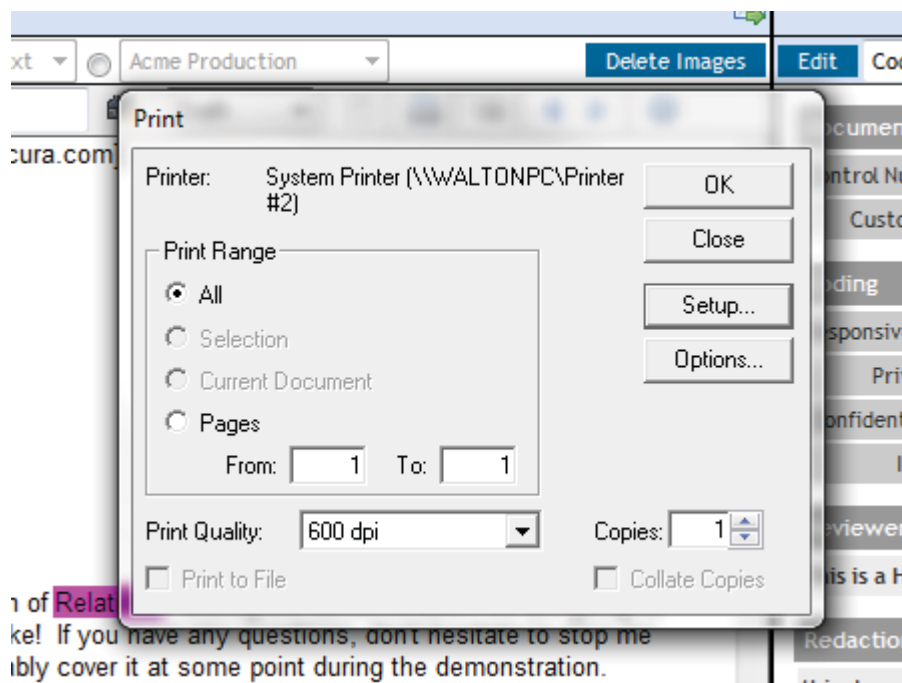
From the Main Document Screen, select the documents you would like to print. Use the drop-downs on the bottom. Keep the first on "checked" and change the second drop-down to "Print Images". Select "Go". Your Printing options will appear in a pop-up. Select your options and click "OK".



From within a document, click on the printer icon on the top of your viewer.



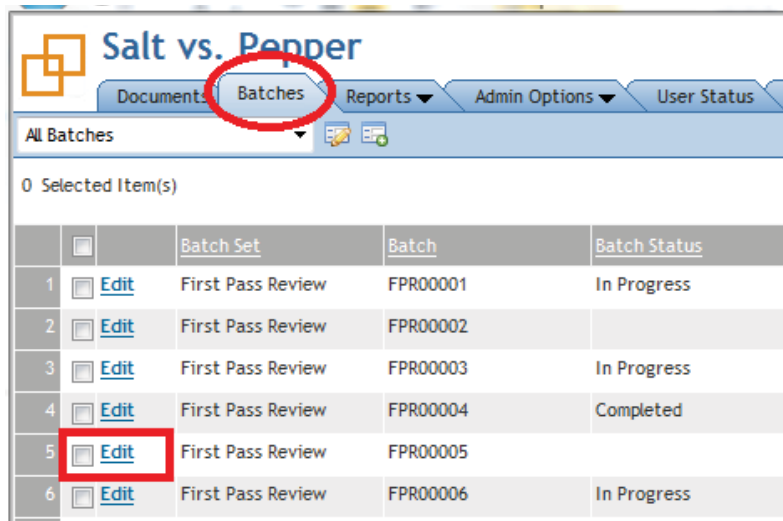
Your pop-up will look a little different if you're printing from Viewer mode, as it's printing the native file as opposed to the image file. You can use the "Setup" option to change your printer settings.



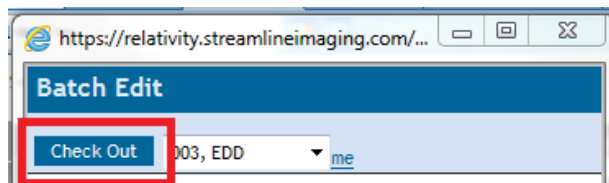
If you click the printer icon while on the Image radio button, your options will look similar to when you printed from the main document list.

Batches

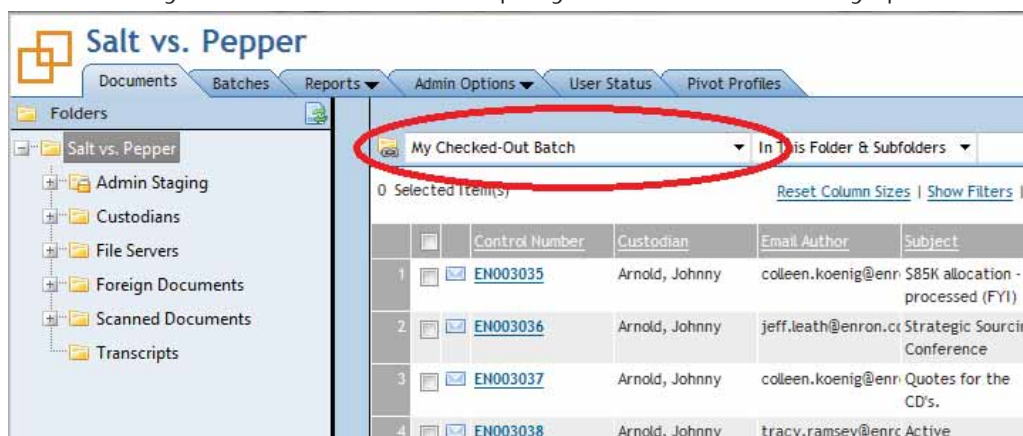
For review teams, batching is an efficient way to have different reviewers review documents and ensure that none overlap. To check out a batch, navigate to the "Batches" Tab. Select the batch you will be checking out and click the blue edit option to the left.



A pop-up will appear. Click the blue "Check Out" button. (When you are done with the batch you may "Check In" the batch in this same way.)



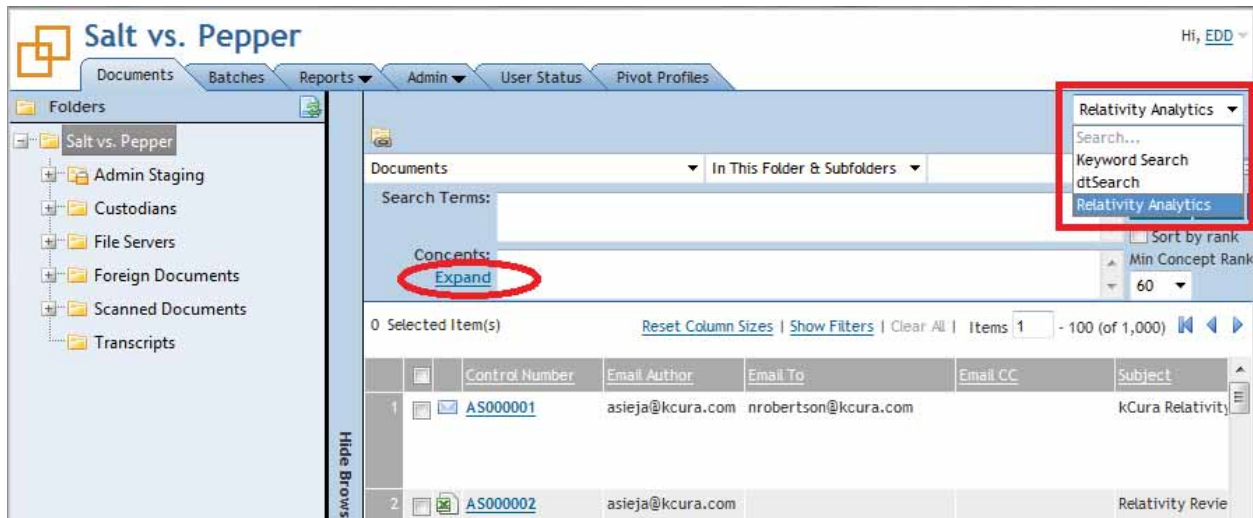
Navigate back to the "Documents" tab and change your view to either "My Checked-Out Batch" or "My Checked-Out Batch Items Not Reviewed". The Items Not reviewed View will allow you to pick up where you left off if you need to interrupt your review at any point.



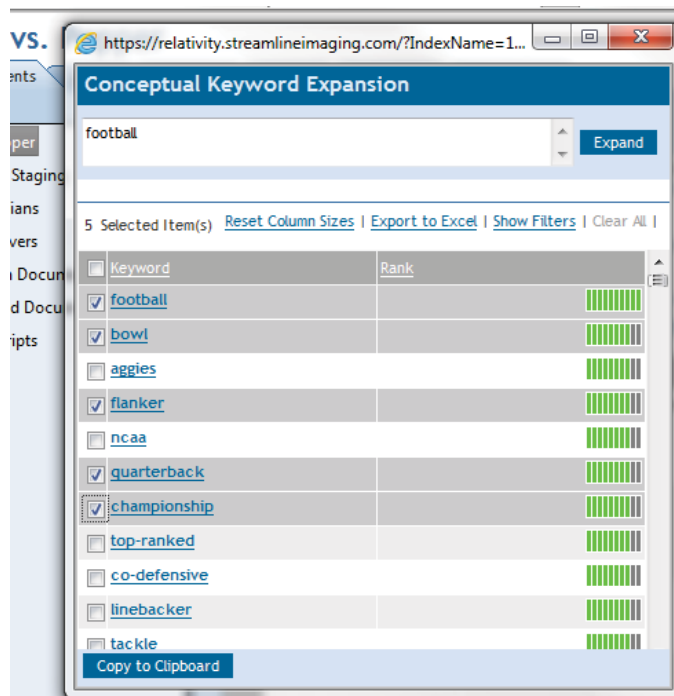
Analytics

Keyword Expansion

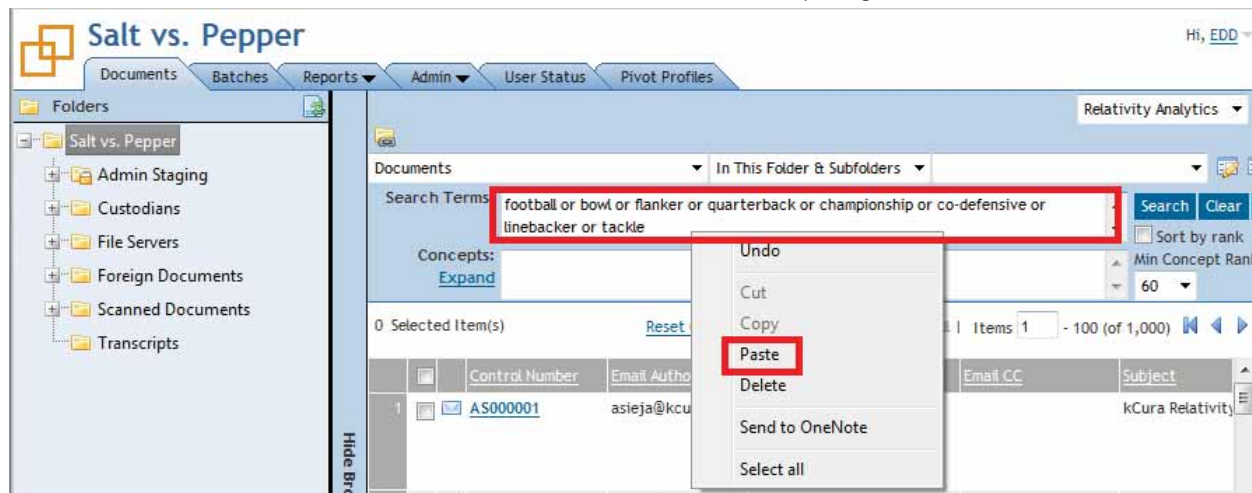
You can do this from the main document view and from the Core Review Interface. From the Main Document View, open the Analytics Index. Two text fields will appear. Click on the "Expand" link to the left of the concept search box.



Type your search term into the textbox and click "Expand". The results will be displayed by their rank on how similar their concept is to the word you entered. You can select words to copy to the clipboard and Relativity will automatically generate a search query.

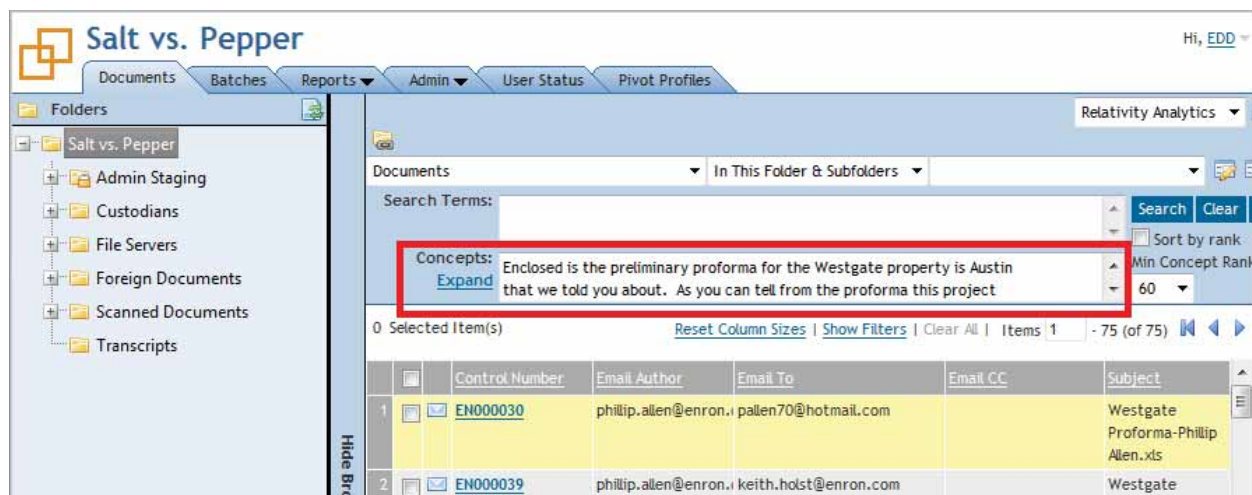


You can then paste these into the search terms box. Press Enter or "Search" to execute the query.

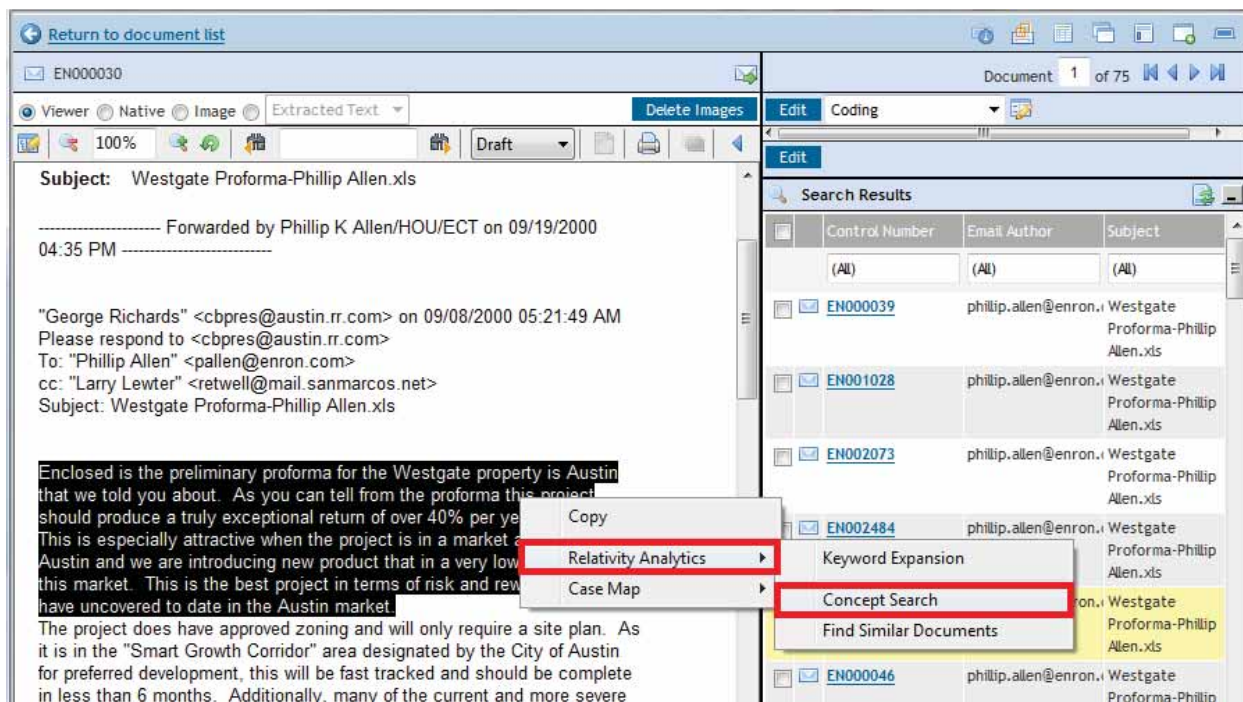


Concept Searching

Copy text from a document (the claim itself is sometimes very helpful) or type a phrase into the concept search text box. The analytics engine works best when there are more words as it can ascertain the relationship and concept between them much more efficiently than just a couple of words.



You can also accomplish this from within the document. Highlight the paragraph/text you would like to submit for concept searching, right click, and select "Concept Search".

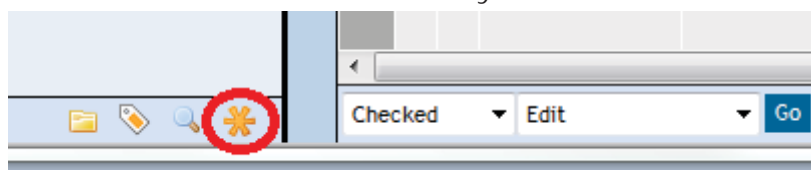


Your results will display on the right within the Related Items Pane.

You can also submit the entire document to the Analytics engine. Right click anywhere within the document, select Relativity Analytics, and then "Find Similar Documents". The results will display within the Related Items Pane.

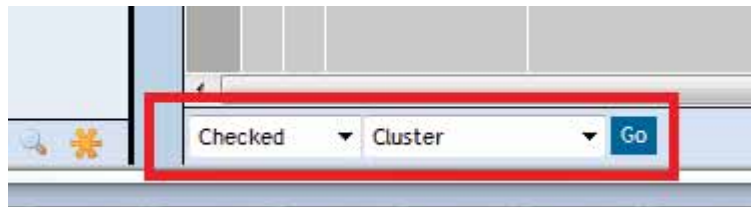
Clustering

Navigate to the Clustering page by clicking on the asterisk icon on the bottom left of your screen.



You can cluster any set of documents. Clustering All documents will give you a good look at how the data groups together. Once you have an idea of what you're looking for, you can further cluster individual custodian's documents, only emails or a certain type of document, or a date range. Clustering is a great tool for identifying relevant information quickly.

To create a cluster, select your documents and utilize the mass action drop downs at the bottom of your screen. Select "Cluster" and click "Go".



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You will have some options to designate how general and how deep you want the clusters to go.

In the advanced Options are initially minimized. Click on the +.

- Title Format: determines how clusters are named
- Maximum Hierarchy Depth: determines how many levels deep the cluster hierarchy will go. The default is 4 levels. A value of 1 will create only top level clusters.
- Minimum Coherence: determines how conceptually correlated the items must be to be included in the same cluster. The default coherence is 0.7.
- Generality: determines how general the cluster will be, with 0 as the most general, and 1 being the most specific. The higher the generality setting, the fewer top level settings will be created. The default generality is 0.5.

Once you've made your choices, click the "Submit for Clustering" button. This may take several minutes, depending on how many documents you are clustering. Keep in mind that there are no magic settings. Every case and every data set is different. The best advice is to try several different settings and see if it's giving you successful results. You can always talk to your admin to get suggestions and further advice.

Categorization

Categorization of documents finds similar records based on a set of example documents you choose. Early in the review process, you may not be familiar with all the documents in your case. However, you may understand the key concepts of the case and can find a few representative examples of those concepts.

Categorization will take example documents and find conceptually correlated documents in the rest of the data set.

This is a bit more tricky than concept searching and creating clusters, so we recommend you discuss with your admin/project manager to set this up.

Assisted Review/Predictive Coding

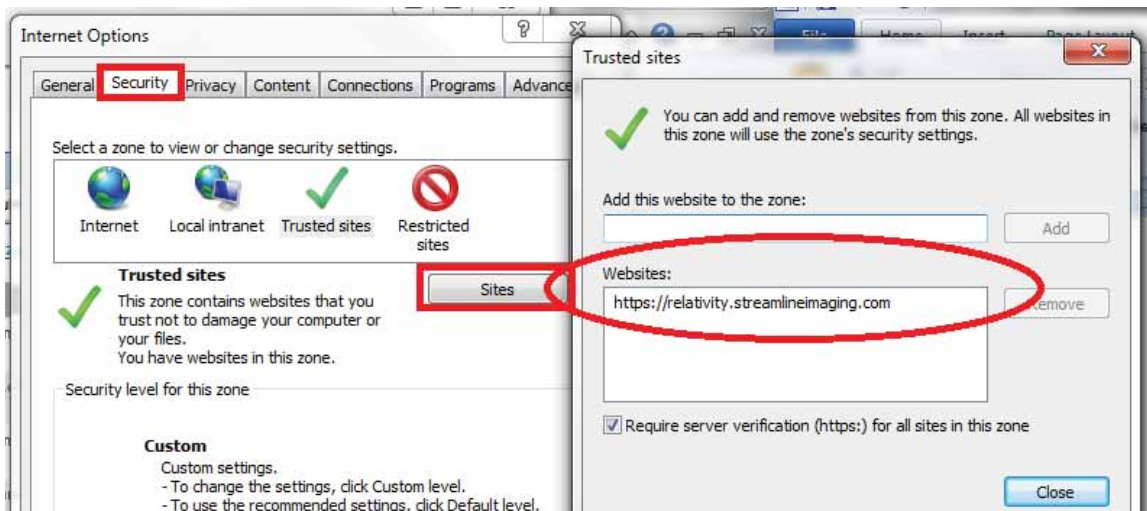
Relativity Assisted Review allows you to code a seed set of documents and apply that coding to the rest of the data set based on their conceptual correlation. This is built on top of the categorization functionality and has a defined workflow. For more information and questions, please contact your admin/project manager.



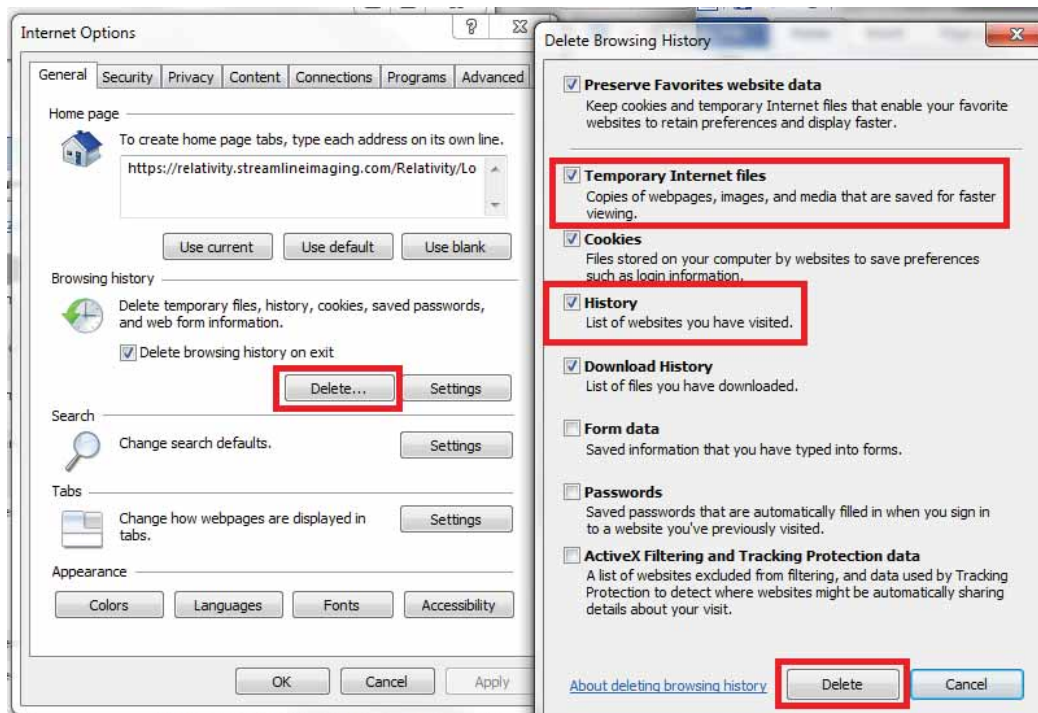
Viewer Errors & Troubleshooting

Sometimes, the viewer can get a little temperamental, mostly because of Internet Explorer. If you're having issues or getting viewer errors, the first step is to adjust your settings in Internet Explorer.

- 1) Close Internet Explorer
- 2) Go to → Internet Options → Security
- 3) Make Sure Relativity is a Trusted Site

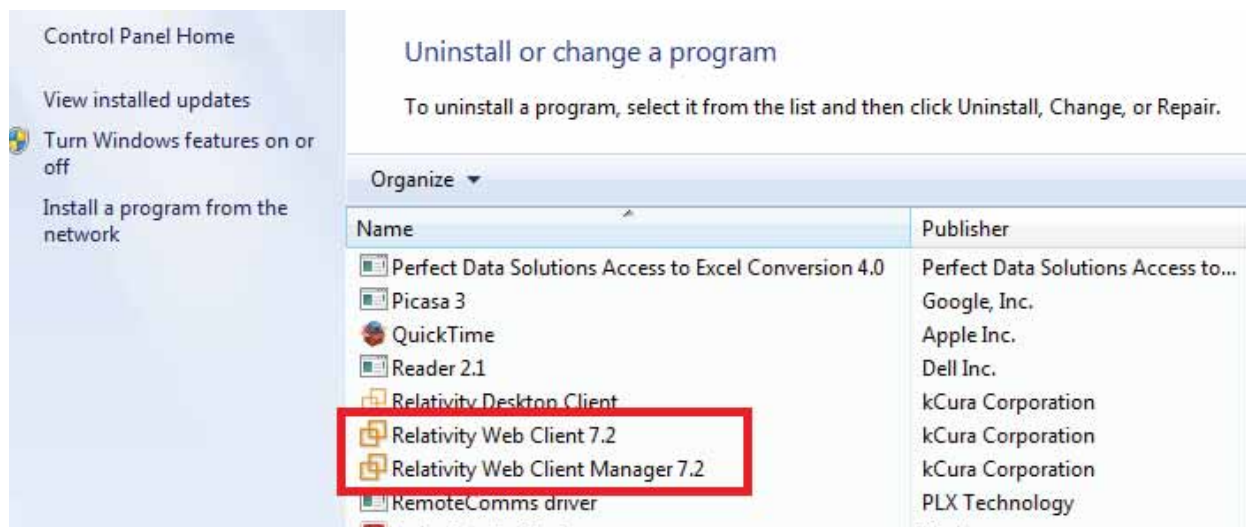


- 4) Go back to the "General" tab and select the option to Delete Browsing History. Make sure the "Temporary Internet Files" and "History" options are checked. Select "Delete".

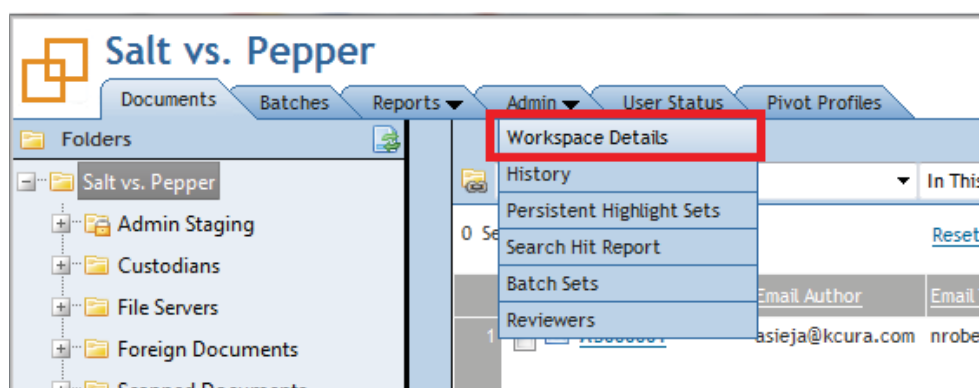


5) Launch Relativity again and see if this fixed the problem. If not, continue to the next options.

If the above did not work, there may be an issue with the viewer itself. Navigate via your control panel to the add/remove programs (Programs and Features in Windows 7) and remove both the "Relativity Web Client" AND the "Relativity Web Client Manager".



Log back into Relativity and into your database. From the "Admin" tab, select "Workspace Details".



Click the blue "Download Viewer Installation Kit" button. Downloading the viewer files this way ensures that all components get installed. You may also let Relativity prompt you when viewing a document for the first time, but the manual install appears to have fewer issues.

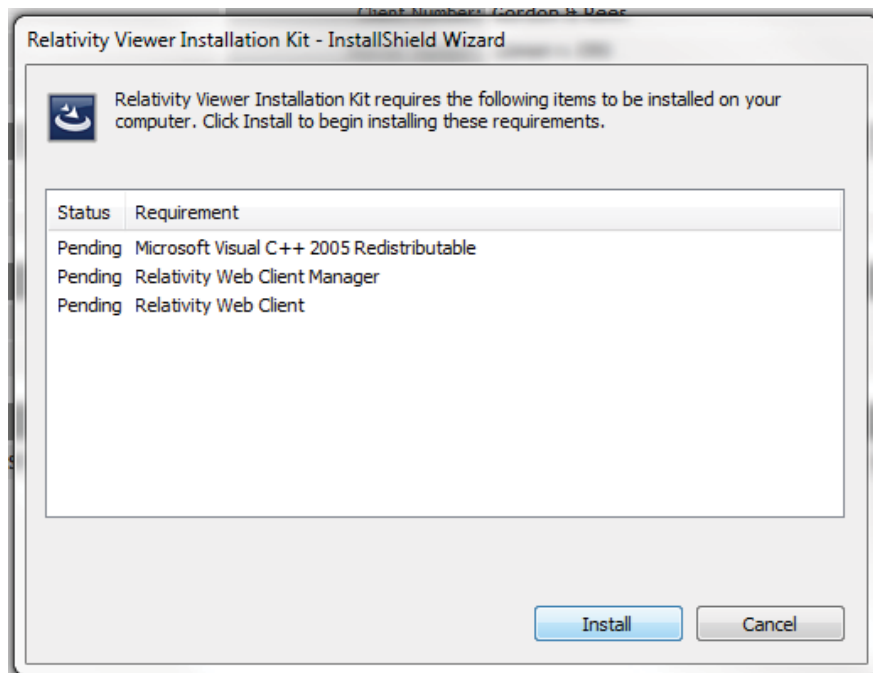
The screenshot shows the 'Salt vs. Pepper' web application. The top navigation bar includes 'Documents', 'Batches', 'Reports', 'Admin::Workspace Details', 'User Status', and 'Pivot Profiles'. Below this is a sub-navigation bar with 'Edit', 'Back', and 'Edit Permissions'. The main content area is divided into two panels. The left panel, titled 'Workspace Information', contains a table with the following data:

Workspace Information	
Name:	Salt vs. Pepper
Client Name:	Salt Inc.
Matter Name:	Salt v Pepper
Status:	Active
SQL Full Text Language:	English
Client Number:	0003
Matter Number:	0002
Production Restrictions:	<no restriction>

The right panel, titled 'Relativity Utilities', contains a list of links: 'Manage System Keyboard Shortcuts', 'Download Relativity Desktop Client 32-bit', 'Download Relativity Desktop Client 64-bit', 'Download Viewer Installation Kit' (circled in red), and 'View Relativity User's Personal Items'. Below the 'Workspace Information' table is a 'Resource Information' section with the following data:

Resource Information	
Resource Pool:	Default
Database Location:	SQL
Default File Repository:	\\SLIFILE01\\Documents
Download Handler URL:	Relativity.Distributed

You will see the below install progress. All files are necessary components to the viewer and are not harmful to your computer.



Once this has downloaded and you go into a document, you may be prompted to RUN the ActiveX add-in. On some computers it loads right away with no prompting. If it does prompt you, continue to select RUN until the document loads.

Every computer is different, and if you are still having issues after trying the above, contact your admin/Project Manager for assistance.

Issues with Documents Loading

Sometimes, if an Excel or Text file is too large, Relativity will freeze while trying to open it. If this occurs you will need to restart Internet Explorer. Navigate to a document that does not have any problems loading and click on the "Native" radio button. Return to the problematic document. This should prompt you to open the document in its native application, rather than attempting to render it within the Viewer.

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Documents not returning in Search

Relativity is very specific with its search syntax. If you are not seeing a document that you think should be returned with your search, contact your admin/Project Manager to make sure your syntax is correct, especially within the advanced and saved search section, where searching can get extremely complex. If you're searching within an opposing production, it may be possible that they did not provide extracted text or OCR for all documents. Your admin/Project Manager will be able to identify if this is the case.

I want to see different Coding options and columns in my main document view

Coding options and columns are extremely easy to customize. Contact your admin/project manager to have them make the adjustments or give you permissions to make them yourself (pending approval by review lead).

For any other questions or assistance, please contact Susan Wheeler at Streamline Imaging.

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