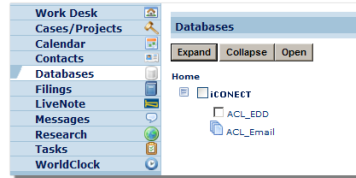


# nXT 850 QUICK REFERENCE CARD

## OPENING A DATABASE

To open a database:

1. In Case Portal, click **Databases**.
2. Expand the Database list, and check the box beside the database (or databases) that you want to open.  
**NOTE:** Document Group databases are indicated by a page icon.
3. Click **Open**.



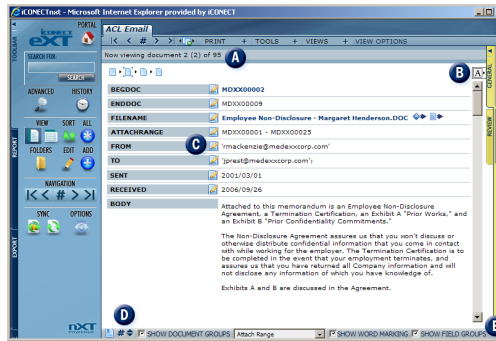
## VIEWING DOCUMENTS

Document records can be viewed using Document View or Table View.

### Document View

*Displays one document at a time (also known as Browse Mode). Fields are listed on the left side and data on the right.*

- A. The "Now viewing document" text identifies the current document, current record (in parentheses), and total number of documents in the database or current search result.
- B. Click the font size icon (A) to increase or decrease the document text size. Click the blank paper icon to reset the text size to the default.
- C. Click the Quick Edit icon, if present, to edit the field without opening the Edit window.
- D. Save Bookmark saves a snapshot of where you are, including current search results. The Sort icon (#) sorts by record number.
- E. The check boxes along the bottom enable you to display or hide features as follows: Document Groups, Word Marking, Field Groups. See the next page for more information on document groups and field groups.

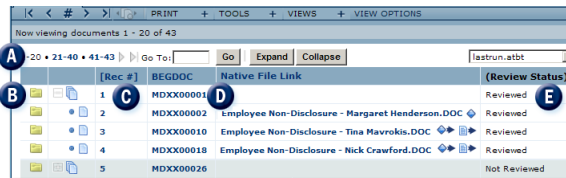


### Table View

*Lists documents in a columned format (one document per row) for quick scanning and sorting.*

- A. Documents are listed in sets of 20. Navigate by clicking a number range, or the arrow buttons, or enter a document number in the Go To box and click **Go**.
- B. Click the folder icon to open the folders/review panel. The folders to which this document has been added are marked with a checkmark.
- C. Click a record number to view the record in Document View.
- D. Click the native file link to view the file in its native application, or click an icon beside the file name to view the file in a viewer. (See "Working with Files and Images" for more information.)
- E. Review Status can be included in Table View, which indicates if the document is Not Reviewed, Pending or Reviewed.

**TIP:** If this column is not visible in Table View, click the View Options menu to select it.



### Toolbar Tab

**SEARCH FOR.** Search for a word or partial word, or phrase, or query string.

**ADVANCED.** Opens the Advanced Search window where you can combine search criteria in an easy-to-use interface.

**HISTORY.** Lists searches run during your current session. Also enables you to save searches, combine, or rerun searches.

**DOCUMENT VIEW.** Display documents one at a time.

**TABLE VIEW.** List documents in a columned format.

**SORT.** Sorts documents in your current result set in ascending or descending order.

**ALL.** Returns the complete database (e.g., after a search, click All if you need to see all records again rather than just the search result.)

**FOLDERS.** Opens the folders/review panel where you can organize documents.

**EDIT.** Enables you to add or clarify data, or to record comments (ask your administrator to create a Comments field).

**ADD.** Enables you to add a new record and enter data in it.

**OPTIONS.** Sets user preferences such as the date format displayed in documents.

**NAVIGATION.** Click the arrow buttons to go forward or backward, or click the # button to go to a specific document number.

**IMAGE SYNC.** Opens the document image automatically as you navigate from record to record. Click again to turn off Image Sync.

**SYNC NATIVE FILES.** Opens the native file automatically as you navigate from record to record. Click again to turn off Native File Sync.

## WORKING WITH E-MAIL

### E-MAIL AND DOCUMENT GROUPS

Your administrator can set up a database to show parent-child document groups, such as:

- ♦ An e-mail (parent) and its attachments (children).
- ♦ A set of near-duplicate documents (the primary near-dup is the parent, the others in the set are children).

#### Document View

There are three visual indicators in Document View to show that you are in a document group, as follows:



Toggles document groups navigation. When on, the icon has a green dot, and the Previous/Next navigation buttons go only to parent documents for faster browsing.



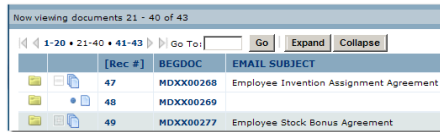
Indicates the documents in the group. Click one of the icons to go to a specific document. The icon with corners indicates the current document you are viewing in that group.



When a document group is selected, the document icons are displayed, and the search results are expanded to display each returned document's full group. If there is more than one group, you stay within the active group as you navigate from document to document.

#### Table View

There are two visual indicators in Table View to show that you are in a document group, as follows:



- ♦ Expand/Collapse buttons are visible when **Show Document Groups** is selected. These buttons expand and collapse the document groups.
- ♦ When expanded, alternate document groups are shaded, and the icons for child records are indented.

### DOMAIN TALLY

Speed up e-mail review by creating a Domain Tally report. The results of this report are added to a folder tab for easy identification and review.

1. From the **Tools** menu, select **Domain Tally**.
2. Choose to create a tally for the entire database, or for a select folder.
3. Select the folder that will contain the report results, and also choose to create sub-folders and a domain reference report if necessary. (Creating subfolders places the To, From, Cc, and Bcc results into separate folders. See the image in "Viewing the Domain Tally Results".)
4. Click **Start**. The domain tally results are placed in the folder you selected.

#### Viewing the Domain Tally Results

The domain tally results show on a folder tab, as follows:

- ♦ **20110510-15:14:10-DTally-All** - Domain Tally for the entire document collection. This contains the date and time the report was run. DTally indicates that this is a domain tally folder, and that the tally was for the entire collection. If the tally is for a folder, the folder name is appended to DTally.
- ♦ If you chose to generate subfolders, the To, From, Cc and Bcc folder names identify the fields that were used for the tally. In each of these folders, the domain name and number of times it's referenced is listed as follows:  
**(000003) @medexxcorp.com.**

The **Domain Reference Report** name is the same as the domain tally results on the folder tab. This report lists the number of times each domain is referenced, and the number of occurrences in To, From, Cc, and Bcc fields.

#### 6 Degrees folders

Documents added to folders from 6 Degrees - Relationship Visualizer are named as follows:

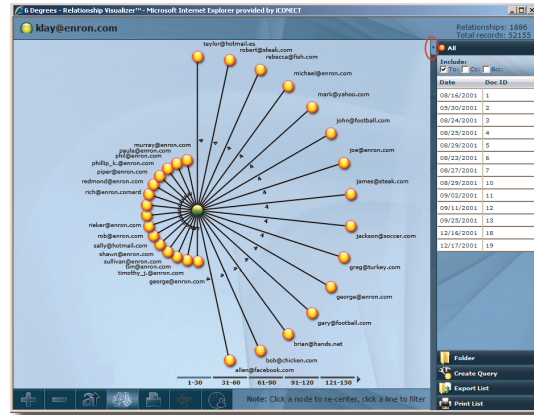
E-mail mode: **F: emailaddress > T: Filter**. Example: F: klay@enron.com > T:All the folder contains e-mail *from* klay@enron.com to all recipients in the collection.

Domain mode: **F: domain > T: Filter**. Example: F: enron.com > T:All the folder contains e-mail *from* enron.com to all domains in the collection.

### 6 DEGREES - RELATIONSHIP VISUALIZER

You can review e-mail and domain associations through 6 Degrees - Relationship Visualizer. Click an icon beside a sender's e-mail address to view all related correspondence in a visually-rich display.

In e-mail mode, each related e-mail address is represented by an orange circle. The number of associations are shown along each line radiating from the green node, the e-mail sender.



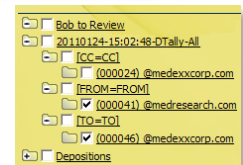
Review and filter displayed associations as follows:

- ♦ Click a **node** to view correlations between two correspondents; click a **line** to highlight correspondence frequency.
- ♦ Use the buttons along the bottom of the screen to zoom in/out, sort the display by letter or number, print, return to the previous view, or switch the mode (e-mail or domain).

Apply additional filters, search for, and folder the related documents as follows:

- ♦ View details about the correspondence date and document records by clicking the filter tab (circled in image). Check/clear **To**, **Cc**, and/or **Bcc** to pinpoint specific relationships.
- ♦ Folder displayed relationships by clicking **Folder**, and select a folder in which to place the documents for further review. (See "Domain Tally" for the differences between these folders and Domain Tally folders.)
- ♦ View documents shown in list by clicking **Create Query**. E.g., if you have Cc selected, your search returns documents where recipients were copied on the sent e-mail.

**TIP:** 6 Degrees searches can be combined using Search History.



## WORKING WITH NATIVE FILES AND IMAGES

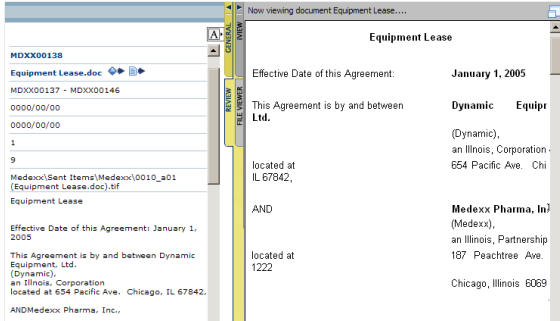
### NATIVE FILES

iCONNECT provides the following native file viewing options. These options can be restricted by your administrator (you might only be able to view a native file in one viewer).

**Launch in the Native application:** Click the native file link (in the following example, Equipment Lease.doc) to download and view the file in the native application, if the application is on your computer.

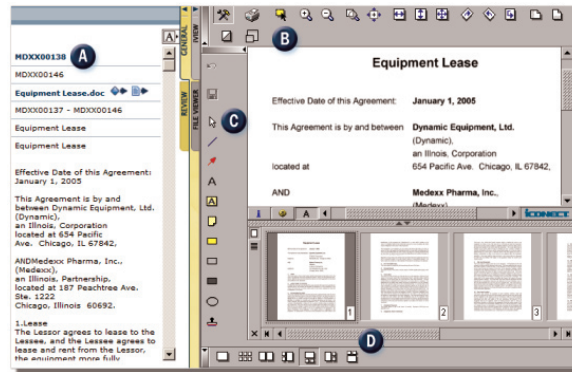
◆ **iVIEW:** Converts the file to a temporary image and displays it in iVIEW for viewing or redacting.

▶ **File Viewer:** Uses true native file viewing technology to render the file, which is displayed in File Viewer, along with any keyword hits from the current search.



### IMAGES

Click an image link to display an image alongside the document data.

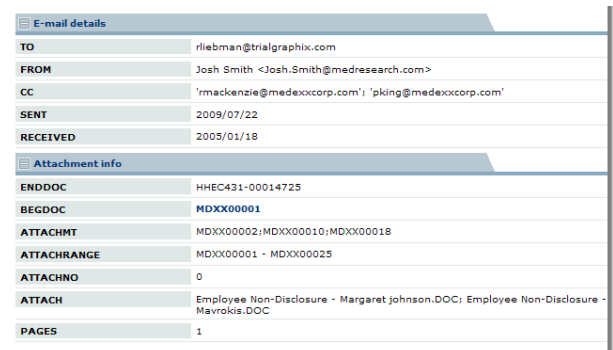
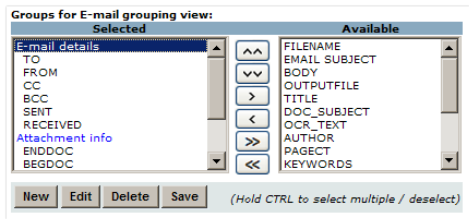


- A. The image link is bold and typically in a field that contains the beginning Bates number.
- B. Image display tools, and an option to print.
- C. Annotation and redaction tools.
- D. Tools that change the layout of the image window, including the location of the image thumbnails.

## GROUPING FIELDS

Review workflow can be streamlined by setting up field groupings in Document View. This allows you to customize the view for yourself or your team.

1. From the Tools menu, select **Field Grouping**.
2. Click **New** to enter a name for the grouping you will create, and then click **Create**.
3. In Groups for your view, click **New** to create a grouping, and select the group heading you've just created.
4. In the Available column, select the fields you want to add to the group and move the fields to the group you just created. If the fields are not indented in the left pane, then they will not display in that group.



5. Click **Save** when done. Ensure you make the Field Grouping View **Active**, and then click **Close**.

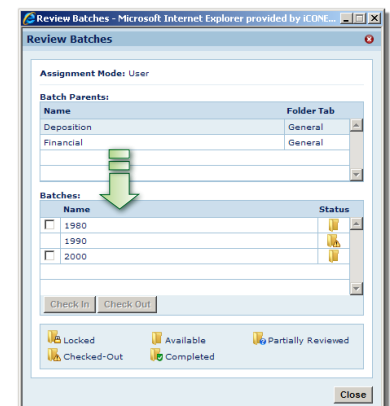
**TIP:** One or more field groupings can be saved in a personal or public template for re-use.

## REVIEW BATCHES

Depending on how your administrator has set up documents for review, you may be prompted to check out a Review Batch. A Review batch contains the documents for review.

1. You will either retrieve or view batches as follows:
  - ◆ You will be prompted to click a link to open a batch (from the Tools menu, select **Review Batching**). Click a batch parent name, select an available batch and then click **Check Out**.
  - NOTE:** Available batches are indicated by a check box and the Available status.
  - ◆ Alternatively, batches may be available in a folder tab. Batches assigned to you have a caution icon on top of the folder icon.
2. Review the documents in the batch.
3. Once finished the review, check in the batch.

**TIP:** To view Review Batch statistics, generate a Batch Stats report from the Reports tab.



## REVIEWING DOCUMENTS

This section provides a sample workflow to show how review can be done in iCONNECT.

1. Organize “to be reviewed” documents into folders on the General folders tab (if not already organized by your administrator).

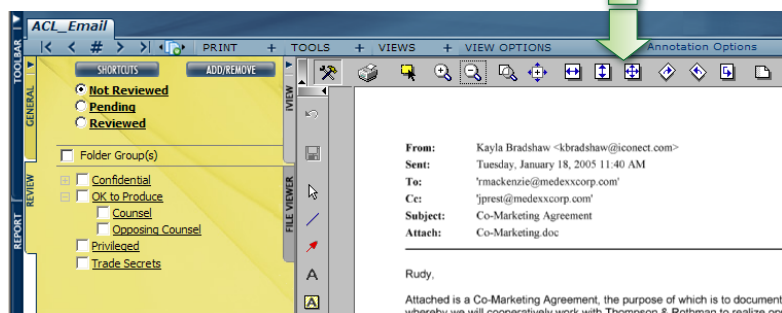
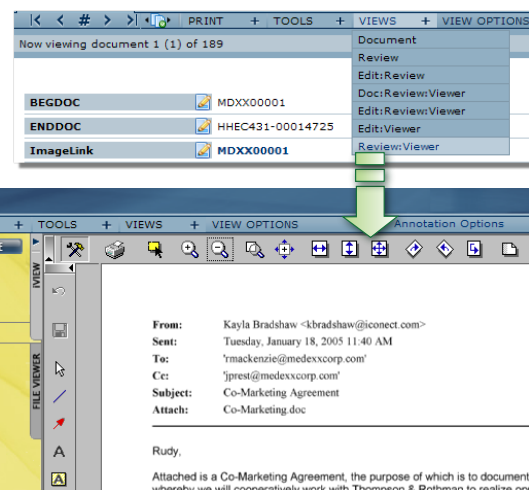
**TIP:** If you expect to assign only one review designation per document, select Options on the Toolbar and choose **Auto Advance on Review** to automatically go to the next document after you select a review designation.

2. On the **Views** menu, select a review template (in the image, the Review:Viewer template has been selected).

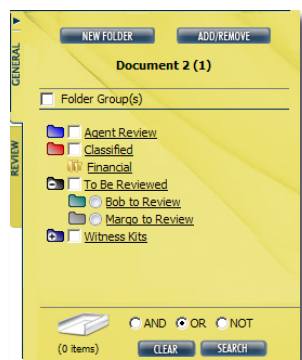
**NOTE:** If image and native file links are present, and the image link field is listed first, then images are displayed by default. Use View Options to change the image/attachment field order to suit your needs.

3. On the General folders tab, click the folder that contains the documents to review (this retrieves those documents). Then click the Review tab to begin the review. (See “Organizing Documents into Folders” and “Reviewing and Classifying Documents”.)

**TIP:** Use keyboard shortcuts to quickly assign review designations.



## ORGANIZING DOCUMENTS INTO FOLDERS

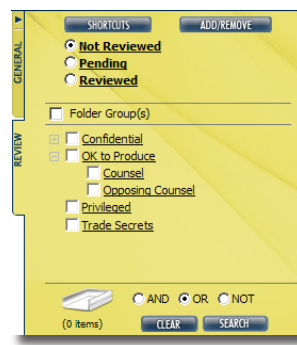


*Use the General tab to organize documents into folders*

Organizing documents into folders does not change any review classification made on the Review tab.

- Click **New Folder** to add a set of documents to a new folder or to create an empty folder that you will fill later.  
**NOTE:** You can make a folder personal (viewable only by you) or public (viewable by everyone). Once the folder type has been set, it cannot be changed.
- Access a batch (if available or checked-out to you) by clicking on the batch.
- To quickly add the current document to one or more folders, select the check boxes or radio buttons for those folders. Click a folder name to retrieve its contents.
- To view documents from multiple folders, click and drag folder names down to the Search tray. Select AND, OR, or NOT to narrow down the result set, and then click the **Search** button.

## REVIEWING AND CLASSIFYING DOCUMENTS



*Use the Review tab to classify documents*

1. Click a check box or radio button to classify the type of review designation. When you assign a review designation, the document's review status is automatically changed to **Reviewed**.  
**NOTE:** If certain checkboxes or radio buttons cannot be selected, check **Tools > Folder Rules** to review folder rules that could affect certain review designations.
2. To perform a bulk review, click the **Add/Remove** button. This assigns a review designation to an entire search result or document range.
3. Search for documents with a status of Not Reviewed by clicking the **Not Reviewed** link (rather than the radio button).  
**TIP:** Monitor review progress by generating a Review Stats or Batch Stats report from the Reports tab. (See “Checking Document and Review Progress” for more information.)

## CHECKING DOCUMENT AND REVIEW PROGRESS

You can monitor document progression (what has been done to the document) and review status by generating any one of the following reports (if available):

- **Review Batch:** Shows the summary of all review batches and their statuses (checked out, available, reviewed and review progress, etc.).
- **Review Stats:** Shows assigned review designations and how many documents have been reviewed.
- **Document Stats:** Shows information for the current document including edit, annotation, dynamic notes, and production information, along with the number of fields in the current document for images, native files, and more.  
**TIP:** You can click the pushpin on the Doc Stats report so that it always displays in Document View – and updates for the current document – as you navigate from document to document.



# SEARCHING

## Best Practices

1. Group your search terms into three categories:
  - ◆ Concepts/subjects/issues
  - ◆ Names
  - ◆ Dates
2. Based on groupings in Step 1, create short queries.
3. Optimize your queries and check your syntax. For example, use parentheses to group terms, use proximity options to focus the search, and include synonyms.
4. Run your queries one at a time, check your results, and then fine-tune the syntax if needed.
5. Combine the queries in the Search History window to further focus the search.
6. Organize search results into folders for later retrieval. You can also save queries through the Search History window so you (or others on your team) can later retrieve and rerun queries.

## SEARCH OPERATORS

<b>Wildcard</b> (multiple character)	*	Use in the middle of a word, or at the start or end of a word. <i>financ*</i> to return finances, financing, etc.
<b>Wildcard</b> (Oracle, single character)	—	Use in a word to replace a single character. <i>sm_th</i> to return smith and smyth
<b>Wildcard</b> (SQL, single character)	%	Use in the middle of a word, or at the start or end of a word. <i>sm%th</i> to return smith and smyth
<b>Phrase</b>	' '	Place phrases in quotes. <i>'financial report'</i>
<b>Fuzzy Misspellings</b>	?	Use at the start of a word. <i>?cats</i> to return cats, oats, calc
<b>Stem Search</b>	\$	Use at the start of a word. <i>\$apply</i> to return apply, applies, applied
<b>Phonetic</b>	!	Use at the start of a word. <i>ISmith</i> to return Smith, Smythe
<b>Or</b>		Use between words. <i>financial   smith</i> (or use the word OR instead of  )
<b>And</b>	&	Use between words to return documents containing two words. <i>financial &amp; smith</i> (or use the word AND instead of &)
<b>Not</b>	~	Use at the start of a word; can also be used to indicate "return abc but not xyz." <i>financial ~ smith</i> to return documents containing the word financial but not the word smith

## KEYBOARD SHORTCUTS

<b>Ctrl + Spacebar</b>	In Document View, displays the next document. In Table View, displays the next group of documents.
<b>F9</b>	In the Edit and Add windows, this saves the current document.
<b>Review designation shortcuts</b>	Your administrator can define keyboard shortcuts (Alt+0 to Alt+9) for review designations. Click Shortcuts on the Review tab to view these designations.

## Advanced Search Window

The screenshot shows the 'Advanced Search' window. At the top is the 'Search builder:' section with a large text input area. Below it are checkboxes for 'Search parent documents' and 'Search child documents', along with 'List' and 'Perform Search' buttons. A section titled 'Build a quick search (search all fields):' contains four rows of search criteria: 'with all of these words (AND)', 'with at least one of these words (OR)', 'with the exact phrase', and 'without the words (NOT)'. Each row has a corresponding input field. To the right of these fields are 'Add' and 'Quick Search' buttons. Below the quick search section are several expandable sections: 'Dictionary lookup', 'Additional field searching options', 'Date range, proximity options', 'Similar word options', and 'Annotated, redacted or edited document options'. At the bottom, there is a checkbox for 'Limit Search to Specific Folders' and a row of buttons: 'Help/Tips', 'Clear Form', 'Preview History', 'Expand All', and 'Collapse All'.

- ◆ Enter a query directly in the **Search Builder** query box, or use the form and search options to specify criteria.
- ◆ For basic searches (such as phrase searches), enter criteria into the Quick Search fields and then click **Quick Search**.
- ◆ Search options are grouped under headings. Click the plus sign beside a heading to view the search options; click **Expand All** to view the entire form.

## Using the Advanced Search Form and Search Builder

1. On the Toolbar tab, click **Advanced**.
  2. Enter criteria in a section of the form and click **Add**. The syntax is added to the Search Builder.
  3. When you are finished, review and edit the full query in the Search Builder, and then click **Perform Search**.
- TIP:** The wildcard (\*) can be used when specifying criteria.

## Saving Searches

1. On the Toolbar tab, click **History**. The searches you have run during your current session are listed.
2. Select the searches you want to save, and then click **Save**.
3. Enter a descriptive name for the search. To allow others to access these searches, clear the **...Personal** check box.

## Retrieving Saved Searches

1. In the Search History window, select a saved searches file from the Open search history file drop-down list, and then click **Open**. The saved searches are listed in a Saved Searches window.
2. Select the check boxes for searches you want to retrieve and click the **Add Selected Searches...** link, or click a search number to run the search and add it to the Search History window.

## Rerunning or Combining Searches

In the Search History window, click the search number link to rerun that search. To combine searches, select the search check boxes and then click AND or OR.

For training, contact 703.860.1110 or [training@iconect.com](mailto:training@iconect.com)