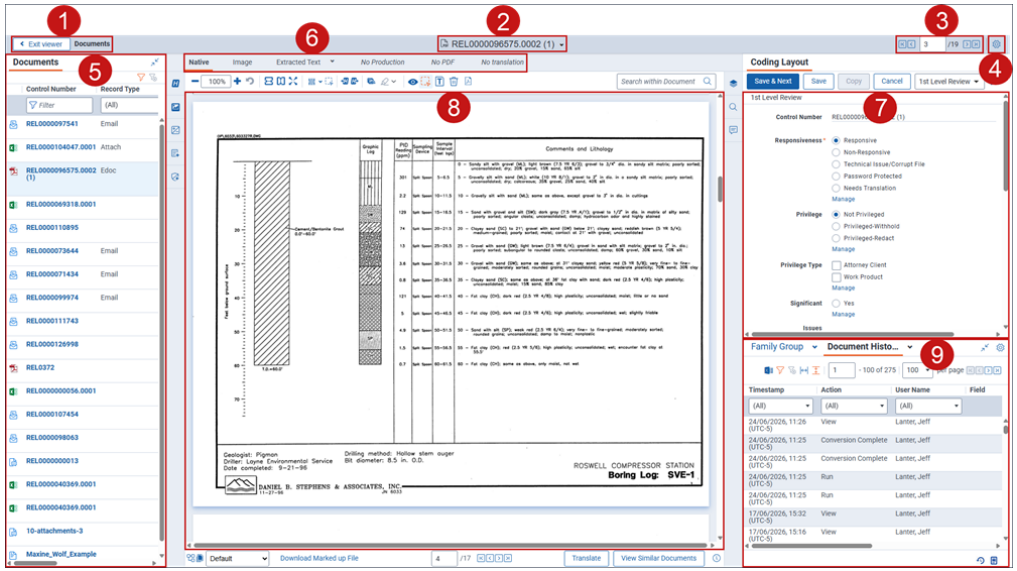
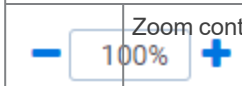
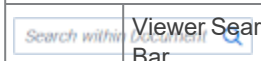
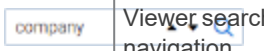
Review Interface quick reference guide

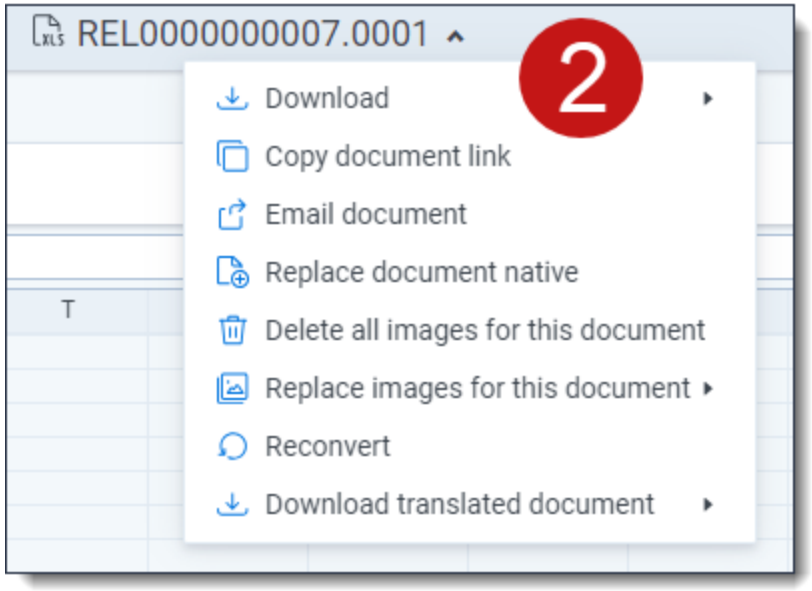
Each viewer serves its own purpose and own file type, but there are common functions within all of them. There are also viewer-specific functionality that is called out in the viewer tables.



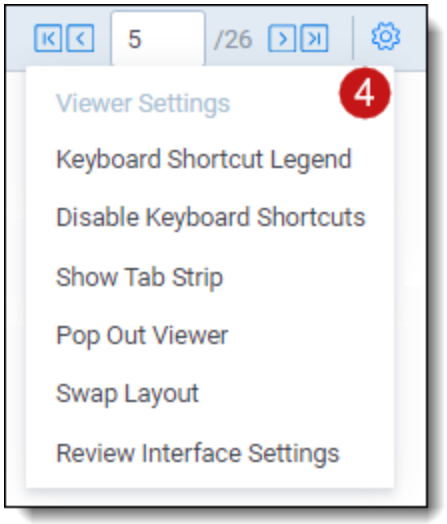
Review Interface features		
1	Breadcrumbs	Displays your current location while browsing documents in the Related items card. If Documents is an active link, you can click it to return to the document you were viewing before browsing documents in the Related items card.
2	Document Actions	Menu of actions the user may perform on the document as a whole.
3	Document navigation	Browse across documents in the Review queue.
4	Viewer settings	Menu of display configurations and review settings.
5	Document list	List presentation of all the documents in the user's Review queue.
6	Viewer type tabs	Select which Viewer type you would like to view the current document in.

Review Interface features		
7	Coding layouts	Customizable coding forms for viewing and editing a document's fields.
8	Viewer	Displays the current document in the selected viewer.
9	Related items card	Identify and act on documents related to the active document.
Common icons, toggles, and actions: This section covers icons, toggles, and other actions that are seen throughout the different viewer types.		
	Zoom controls	Manually zoom out and zoom in.
	Reset zoom	Reset to default zoom.
	Preset zoom controls	Fit to Width, Fit to Height, and Fit Actual.
	Layout mode	Select an option to determine how documents that are more than one page long display in the Viewer. Not available in the Extracted Text Viewer.
Viewer Search Bar: You can search the current document for exact matches. Not available in the Image Viewer or Productions Viewer.		
	Viewer Search Bar	Enter a terms search to highlight the results in the Viewer. The Search Bar supports dtSearch and so proximity, fuzziness, and stemming can be used.
	Viewer search navigation	Navigate across viewer search hits.

Document actions and Viewer settings



Document actions—menu of actions the user may perform on the document as a whole.	
translated document	download a copy of the document in the selected language. This option only displays if a document has been translated.

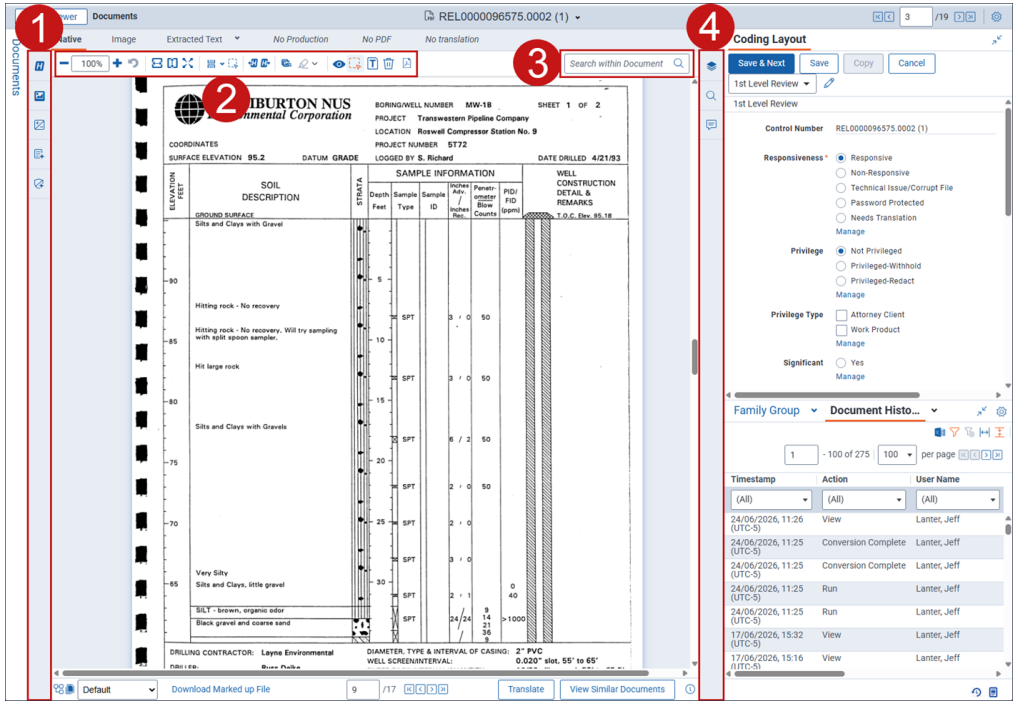


Document actions—menu of actions the user may perform on the document as a whole.	
Download	Hover your cursor over this option and select one of the options to download a copy of the current document. Alternatively, you can click on the document's name to download the native file.
Copy document link	Select to copy the URL to the current document to your clipboard.
Email document	Select to open an email in your default email application with the URL to the current document included in the body of the email.
Replace document native	Select to replace the native file of the current document with a new file.
Image on the fly	Hover your cursor over this option to show Image Profile options. Select the desired profile to begin imaging the current document.
Upload images for this document	Select the desired profile to replace the images for the current document using that imaging profile.
Reconvert	Select to clear your internet browser's cache and reload the current document for review.
Download	Hover your cursor over this option and select the desired language to

Viewer settings—menu of display configurations and review settings.	
Keyboard Shortcut Legend	Displays the keyboard shortcuts legend.
Enable/Disable Keyboard Shortcuts	Turns keyboard shortcuts on or off.
Show/Hide Tab Strip	Toggle the Sidebar and Tab strip in the Viewer
Pop Out Viewer	Select to open the Pop Out Viewer in a new browser window
Swap Layout	Select to move the Coding Layout and the Document card to the opposite side of the Viewer.
Review Interface Settings	System administrators can select this option to view and edit instance settings and extensions to aid in troubleshooting.

Native Viewer

Use this section to understand the Native Viewer and its options.



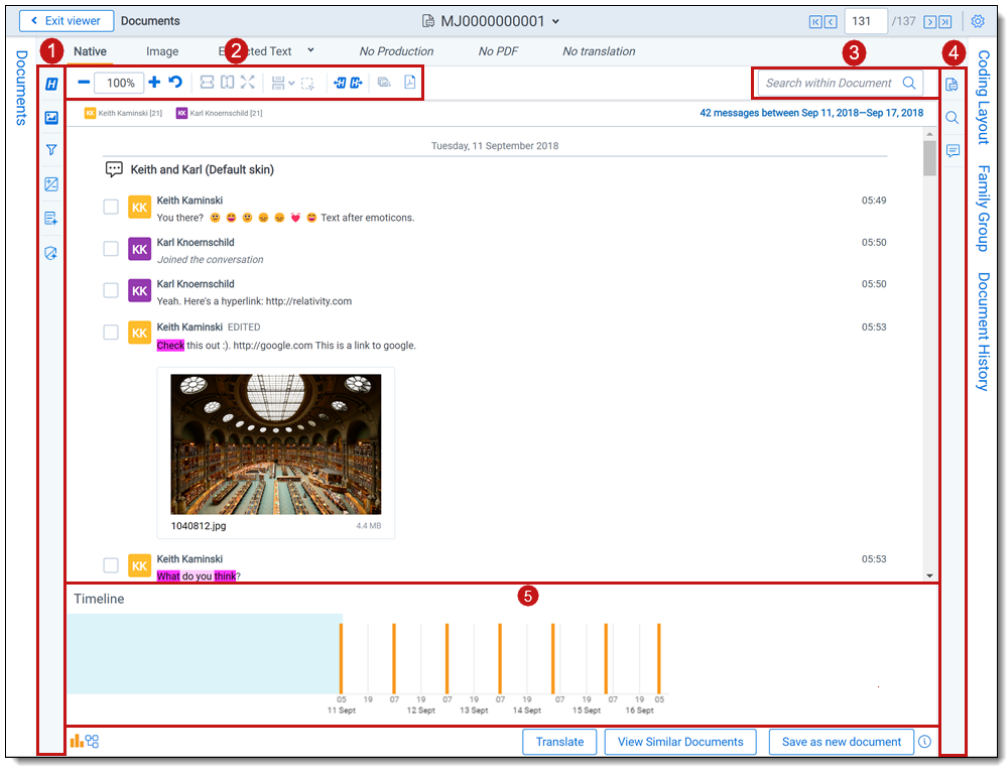
Native Viewer features		
1	Left-drawer viewer options	Locate where the user may review highlight sets and terms associated with the current document, access the Thumbnail Viewer, or review the sentiment analysis highlights.
	Persistent highlighting	Click to toggle the user's view of each highlight set.
	Thumbnails	Click to toggle the left drawer and display the Thumbnail Viewer.
	Sentiment Analysis highlights	Click to toggle the left drawer and display sentiment highlights.

Native Viewer features		
	aiR Review Analysis	Click to toggle the left drawer and view aiR Review results.
	Privilege	Click to toggle the left drawer and view Privilege results.
2	Native Viewer toolbar	The viewer toolbar buttons for each viewer display here.
	Draft mode	Click to begin Draft mode which automatically contrasts text from the background.
	Highlight navigation	Navigate across all highlight search hits for checked terms within active sets or for specific highlight sets or terms when selected.
	Rotate all pages	Rotates all pages in a document clockwise 90 degrees. This option is only available for documents that have been paginated.
	Designation Display	Click and select an option from the drop-down menu to determine how designations display in the Viewer. This option is only available if you have the Relativity.Transcripts application installed and you are viewing an MDB file in the Native Viewer.
	Redact markup visibility	Click to toggle between the markup display modes: Solid, Transparent, and Hidden.
	Selector	Click to enable the selection of markups in the Viewer using left or right click on your mouse. This option only displays if you open a PDF document in the Native Viewer.
	Text Selection Mode	Click to enable text highlight by clicking and dragging your cursor across it. You can then right-click on the highlighted text and copy it. This option only displays if you open a PDF document in the Native Viewer.
	Clear Markups	Click to remove all markups from the currently selected markup set for this document. This icon only displays in PDF and Excel documents that have been prepared for Redact.

Native Viewer features		
	Create PDF	Click to save the current native document as a PDF file.
3	Viewer Search Bar	Enter terms to highlight the results in the Viewer. It supports dtSearch and so proximity, fuzziness, and stemming can be used. Navigate across Viewer search hits.
4	Right-drawer Viewer options	Toggle all hidden content in the current document or toggle the Contextual Search pane.
	Hidden content	Click to display information about hidden content. Hidden content can appear in Excel, Word, PDF, or Powerpoint documents.
	Contextual Search, Find and Redact	Click to toggle the Contextual Search pane. This feature allows you to navigate to matching search terms in a document. After entering your search terms in the Contextual Search box, you can select markup options and apply redactions or markups to the desired results using Find and Redact.
	Comments	Click to expand the right drawer and display the Comments pane. From this pane, reviewers can add, edit, or delete comments on any text-based or AV documents in the Native Viewer.

Short Message Viewer

Use this section to understand the Short Message Viewer and its options.



Short Message Viewer features		
1	Left-drawer Viewer options	Locate where the user may review highlight sets and terms associated to the document, access the Thumbnail Viewer, apply filters to short messages, or review sentiment analysis highlights.
	Persistent Highlighting	Click to toggle the user's view of each highlight set.
	Thumbnails	Click to toggle the left drawer and display the Thumbnail Viewer

Short Message Viewer features		
	Filter	Click to toggle the filters which can be used to narrow down what short messages display in the current document.
	Sentiment Analysis	Click to toggle sentiment highlights.
	aiR Review Analysis	Click to toggle the left drawer and view aiR Review results.
	Privilege	Click to toggle the left drawer and view Privilege results.
2	Short Message Viewer toolbar	The viewer toolbar buttons for each viewer display here.
	Draft mode	Click to begin Draft mode which automatically contrasts text from the background.
	Persistent Highlight navigation	Navigate across all highlight search hits for checked terms within active sets or for specific highlight sets or terms when selected.
	Rotate all pages	Rotates all pages in a document clockwise 90 degrees. This option is only available for paginated documents.
	Create PDF	Click to save the current native document as a PDF file.
3	Viewer search bar	Enter terms to highlight the results in the Viewer. It supports dtSearch and so proximity, fuzziness, and stemming can be used. Navigate across Viewer search hits.
4	Right-drawer Viewer options	Toggle RSMF validation information or toggle the Contextual Search Pane.
	RSMF validation	Click to toggle the RSMF Validation pane to show information to help you troubleshoot any errors in the RSMF file.
	Contextual Search	Click to toggle the Contextual Search Pane. This feature allows you to navigate to matching search terms in a document.

Short Message Viewer features		
	Comments	Click to expand the right drawer and display the Comments pane. From this pane, reviewers can add, edit, or delete comments on any text-based or AV documents in the Native Viewer.
5	Timeline Navigator	Click to expand or collapse the Timeline Navigator to show time and duration short message information on the document.

Image Viewer

Use this section to understand the Image Viewer and its options.

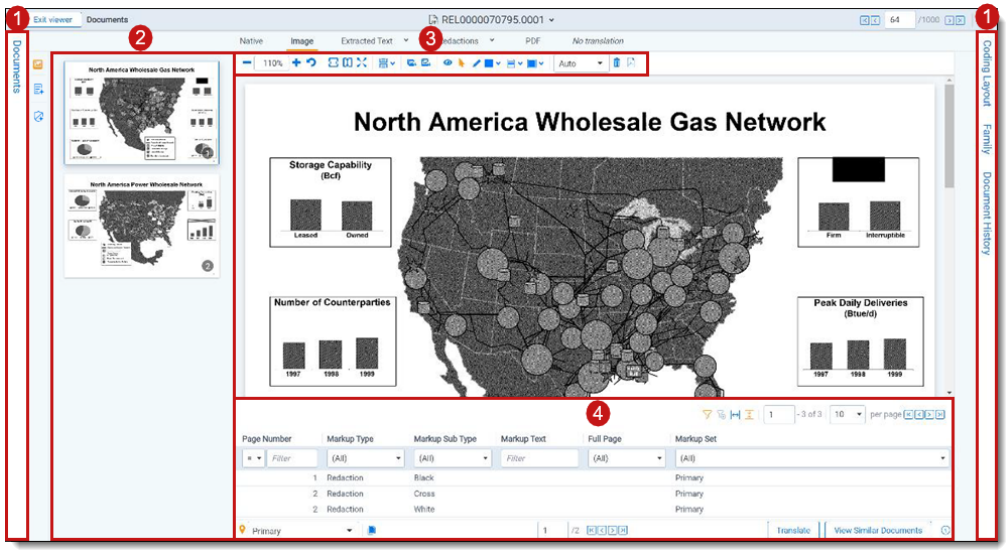
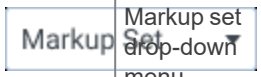


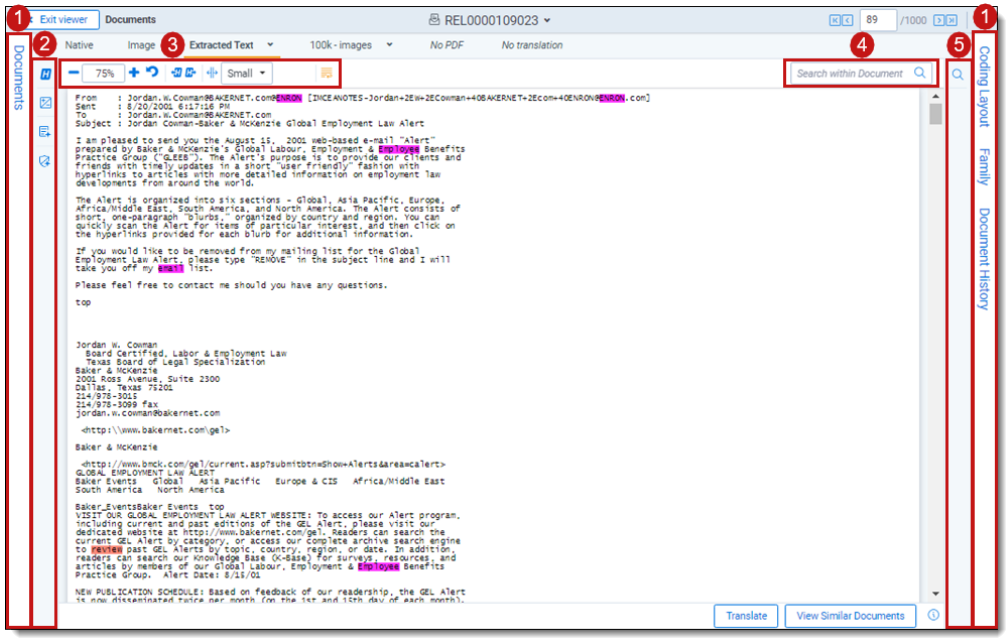
Image Viewer features		
1	Collapsible cards	Documents list, Coding layout, Family, Document History cards can be minimized or expanded, as needed.
2	Thumbnails drawer	The viewer toolbar buttons for each viewer display here.
	Thumbnail	Click to toggle the left drawer and display the Thumbnail Viewer.
	aiR Review Analysis	Click to toggle the left drawer and view aiR Review results.
	Privilege	Click to toggle the left drawer and view Privilege results.
3	Image Viewer toolbar	Searches the current document for exact matches.

Image Viewer features		
	Rotate all pages	Rotates all pages in a document clockwise 90 degrees. This option is only available for documents that have been paginated.
	Markup visibility	Allows the user to adjust the opacity of the selected markup set – redaction (100%), transparent (50%), and off (0%).
	Selector	When this icon is active, the user may select one or many markups to perform an action across all the selected markups (edit, delete, move).
	Highlight markup color	Allows the user to change the highlight markup color.
	Redaction markup mode	Allows the user to determine which markup redaction mode they want to draw the markup with: basic, full-page, inverse, or mass redact modes.
	Redaction markup type	Allows the user to determine which markup redaction type they want to draw the markup with: black, cross, white, or text redaction types.
Auto	Redaction text font size	Allows the user to adjust the font size of selected redaction text markup.
	Delete Highlights	This icon opens the Mass delete markup pop-up window where the user may delete a highlight markup, partial markup, or full-page markup.
	Create PDF	Click to save the current native document as a PDF file.
4	Markup navigator	Displays all the markups for each markup set for the current document.
	Markup sets navigator	Click to toggle the Markup sets navigator.

Image Viewer features		
	Markup set drop-down menu	Click and select the markup set that is displayed on the image of the current document.
	Redact image markup navigator	Click to toggle the Redact Markup Navigator where you can review markups that were applied by projects.

Extracted Text Viewer

Use this section to understand the Extracted Text Viewer and its options.

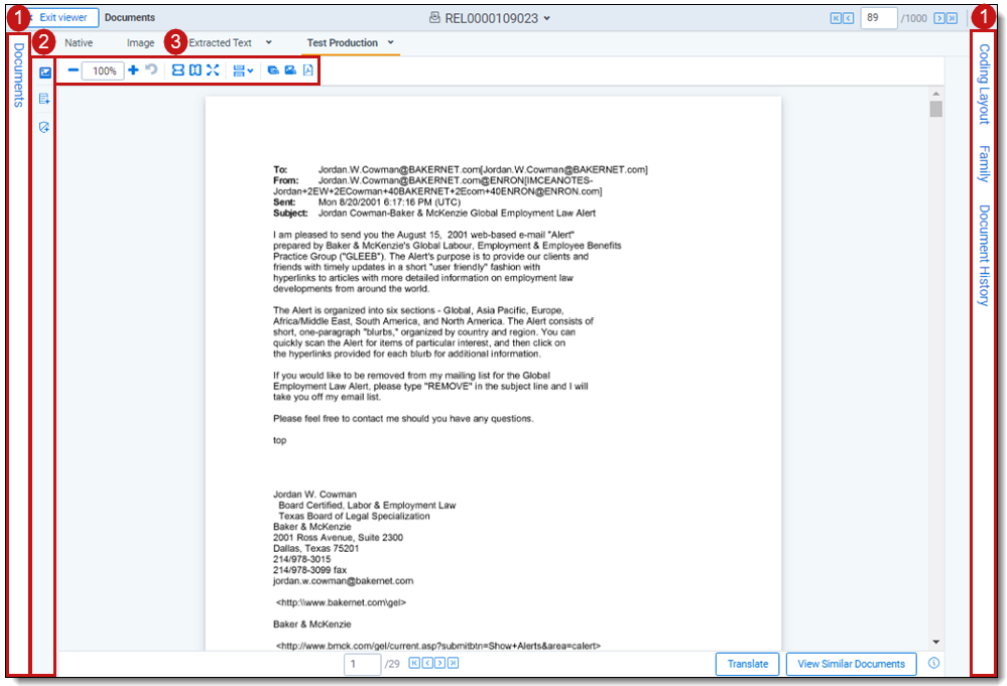


Extracted Text Viewer features		
1	Collapsible cards	Document list, Coding layout, Family, and Document History cards can be minimized or expanded.
2	Left-drawer viewer options	Locate where the user may review highlight sets and terms associated with the current document or access Sentiment Analysis highlights.
	Persistent highlighting	Click to toggle the user's view of each highlight set.
	Sentiment Analysis highlights	Click to toggle sentiment highlights.
	aiR Review Analysis	Click to toggle the left drawer and view aiR Review results.

Extracted Text Viewer features		
	Privilege	Click to toggle the left drawer and view Privilege results.
3	Text viewer toolbar	The Viewer toolbar buttons for each Viewer are placed here.
	Highlight navigation	Navigate across all highlight search hits for checked terms within active sets or for specific highlight sets or terms when selected.
	Text delimiter size (Small)	You can use this drop-down menu to adjust the size of tab characters in the document text. This can be used to better align text in spreadsheets.
	Toggle WordWrap	Click to turn word wrapping on or off when viewing document text.
4	Viewer search bar	Searches the current document using dtSearch syntax. Enter a terms search to highlight the results in the Viewer. The Search Bar supports dtSearch and so proximity, fuzziness, and stemming can be used. Navigate across viewer search hits.
5	Right-drawer viewer options	Toggle the Contextual Search Pane.
	Contextual search	Click to toggle the Contextual Search Pane. This feature allows you to quickly navigate to matching search terms in a document which is useful in longer documents or ones that have many matching search terms.

Productions Viewer

Use this section to understand the Productions Viewer and its options.

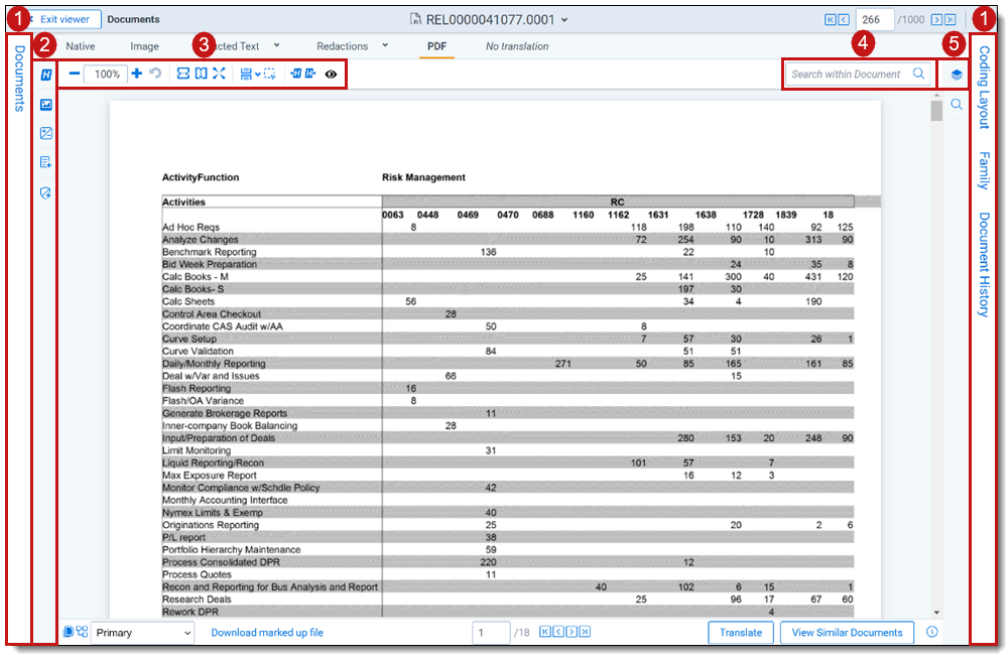


Production Viewer features		
1	Collapsible cards	Document list, Coding layout, Family, and Document History cards can be minimized or expanded.
2	Left-drawer viewer options	Locate where the user may review highlight sets and terms associated with the current document or access Sentiment Analysis highlights.
	Thumbnail	Click to toggle the left drawer and display the Thumbnail Viewer.
	aiR Review Analysis	Click to toggle the left drawer and view aiR Review results.
	Privilege	Click to toggle the left drawer and view Privilege results.

Production Viewer features		
3	Text viewer toolbar	The Viewer toolbar buttons for each Viewer are placed here.
	Rotate all pages	Rotates all pages in a document clockwise 90 degrees. This option is only available for documents that have been paginated.
	Create PDF	Click to save the current native document as a PDF file.

PDF Viewer

Use this section to understand the PDF Viewer and its options.



PDF Viewer features		
1	Collapsible cards	Document list, Coding layout, Family, and Document History cards can be minimized or expanded.
2	Left-drawer viewer options	Locate where the user may review highlight sets and terms associated with the current document or access Sentiment Analysis highlights.
	Persistent highlighting	Click to toggle the user's view of each highlight set.
	Thumbnail	Click to toggle the left drawer and display the Thumbnail Viewer.

PDF Viewer features		
	Sentiment Analysis highlights	Click to toggle sentiment highlights.
	aiR Review Analysis	Click to toggle the left drawer and view aiR Review results.
	Privilege	Click to toggle the left drawer and view Privilege results.
3	PDF viewer toolbar	The Viewer toolbar buttons for each Viewer are placed here.
	Draft mode	Click to begin Draft mode which automatically contrasts text from the background.
	Highlight navigation	Navigate across all highlight search hits for checked terms within active sets or for specific highlight sets or terms when selected.
	Redact markup visibility	Click to toggle between the markup display modes: Solid, Transparent, and Hidden. This option only displays if you have the Redact application installed.
4	Viewer search bar	Searches the current document using dtSearch syntax. Enter a terms search to highlight the results in the Viewer. The Search Bar supports dtSearch and so proximity, fuzziness, and stemming can be used. Navigate across viewer search hits.
5	Right-drawer viewer options	Toggle all hidden content in the current document or toggle the Contextual Search Pane.
	Hidden Content	Click to display information about hidden content. Hidden content can appear in Excel, Word, PDF, or Powerpoint documents.
	Contextual Search	Click to toggle the Contextual Search pane. This feature allows you to quickly navigate to matching search terms in a document which is useful in longer documents or ones that have many matching search terms.

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