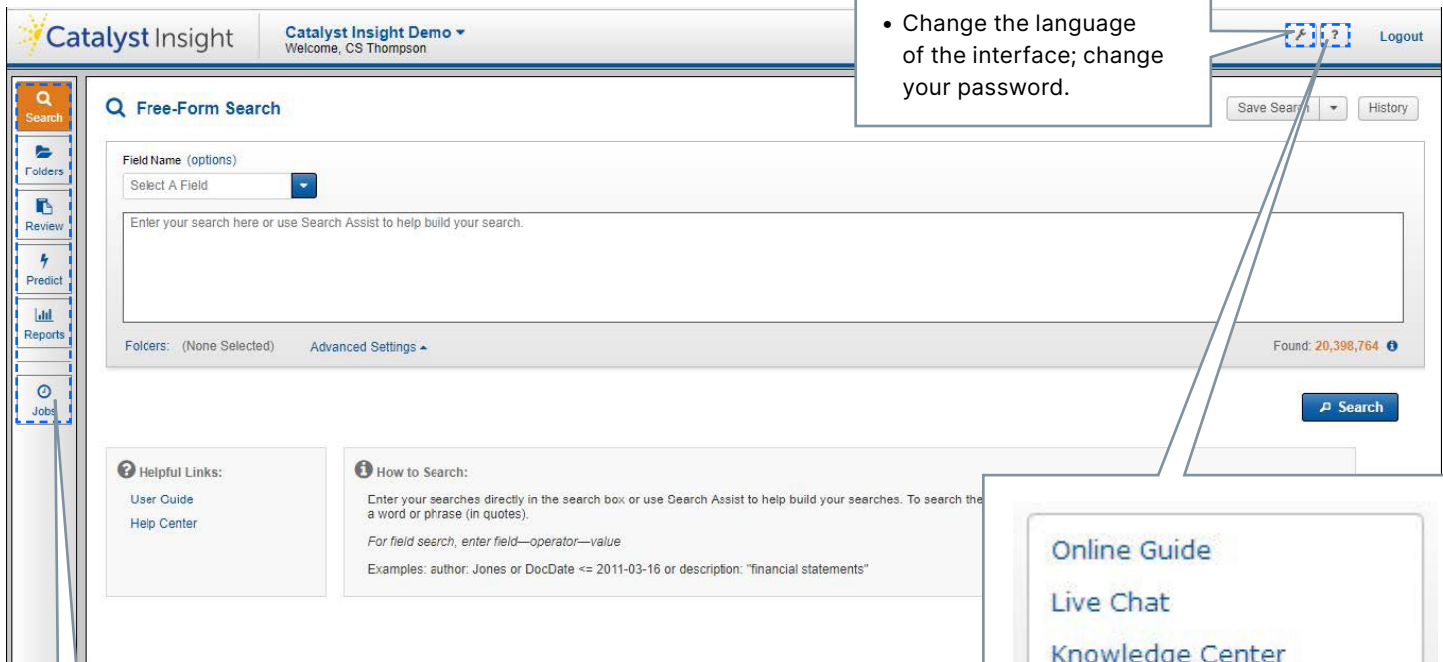


## QUICK GUIDE

# Insight Review

## GLOBAL NAVIGATION



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

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

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



### Chrome is the preferred browser.

Chrome Settings

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

### We also support the Firefox browser.

Firefox Settings

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

## FREE-FORM SEARCH

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

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

Free-Form Search

Field Name (options): Author Operator: is (=) Value (Multi-Value): Kingsford Jones Add Using: AND OR Add To Search

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

Folders: (None Selected) Advanced Settings Found: 20,398,764

Search

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

Select Search Folders

- My Folders
  - For Further Review
  - Key Documents
  - More Like This
  - Ranked Docs
- Shared Folders

Selected: clear all

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

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

Field Name (options): Select A Field

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

Settings:
 

- Case Sensitive
- Diacritic Sensitive
- Stemming

Language: English

Collections: all | none
 

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

Folders: 2 Selected Advanced Settings

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

**i** View the Search Quick Guide for syntax information.

## FACETED SEARCH

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

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

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

Inserts an OR connector between queries.

Inserts an AND connector between queries.

Inserts a NOT between queries.

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

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

• **Found:** Notice the instant record count!

The screenshot shows a search interface with a search bar, a list of facets (Author, DocDate, Custodian, DocType), a bar chart for DocDate, and a list of values for Custodian and DocType. Callouts point to various UI elements like the search bar, facet selection buttons, the bar chart, and the 'Found' count.

## TRACKED SEARCH

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

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

• Limit search by custodian.

• Limit search by date range.

• Select other criteria.

The screenshot shows a search interface with a search bar, a list of criteria (Any of These, All of These, None of These), a list of custodians, a list of dates, and a list of criteria. Callouts point to various UI elements like the search bar, the criteria list, the custodian list, the date list, and the criteria list.

## RESULTS

- Breadcrumb trail for retracing your path.

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

Search Results Refine Search

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

Filters Table Charts Communication Explorer Communication Report Communication Tracker Size

Display: Default Display Sort: BegControl - BegAtt Records/Page: 100

	BegControl - DocId FileExtension	FamilyCount	ReviewStatus Privileged PrivilegeType	Issues Comments HasRedactions	From To SentDate	Subject Title	ReviewStatus RedactionStatus
<input type="checkbox"/>	3 579849 .msg		NotReviewed			amstover in Coro	NotReviewed
<input type="checkbox"/>	4 CHD000002881 579899 .msg	1	PotentiallyPrivileged	237	Biever Jason; Brodeur Stephane; Burnham Stev...	Reports - CERA and Friedenber	NotReviewed
<input type="checkbox"/>	5 CHD000002908 579893 .xls	2	NotReviewed PotentiallyPrivileged	update testJCT237		klauer Enron Corp	NotReviewed
<input type="checkbox"/>	6 CHD000008588 583551 .msg	1	NotReviewed PotentiallyPrivileged	237	Valdes Maria (Maria.Valdes@ENRON.com) Dorland Chris 2002-01-29 07:26:40 AM	FW: Argentina's Evolving Crisis: Implicati...	NotReviewed
<input type="checkbox"/>	7 COO000000092 135486 .msg	2	NotReviewed PotentiallyPrivileged		Erik Cramer cramer@cadvision.com@ENRON (... Zuffenl John; nicolas Demers; Kelly Dukart, Jed ... 2002-01-18 09:41:12 PM	Jan 16 marks.xls	NotReviewed

- Use Filters to narrow your search results.

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

- Quick sort on a column.

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

Filter Table Charts Communication Explorer Communication Report Communication Tracker Size

100 Selected Copy Print Export Update Fields

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

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

## DOCUMENT DETAIL PAGE

The screenshot shows the Document Detail Page for document ANL000000776. The interface includes a top toolbar with 'Text', 'Viewer', and 'Redact' tabs. Below the toolbar are 'Copy To Folder' and 'Download' buttons. A 'Highlights' panel on the left lists various search terms like 'Email Address', 'Key Terms', and 'Social Security Number'. A 'Thumbnails' panel on the far left shows document thumbnails. A 'Review' panel on the right displays document details and a 'Linked Documents' table at the bottom.

- Convert to PDF and Redact.
- Navigate to other documents.
- Move the form to the left or right of the document, view history and shortcut keys.
- Copy to Folder and Download.
- Select the document display.
- In the Viewer display, use the Thumbnails panel to find specific pages.
- Click Highlights to view Pattern-Based Terms, Static and Search Terms, and additionally, at Your Terms, enter your own term to find within a document.
- Access other forms
- Forms are created and customized by administrators.
- Linked documents (e.g. related, duplicates) are located at the bottom.

## FOLDERS

The screenshot shows the 'Folders' panel on the left side of the interface. It is divided into 'Static Folders' (My Folders, Shared Folders, Public Folders) and 'Dynamic Folders' (ChronBatch, Collection, Custodian, Issues, Language, Produced, Review Status, ReviewBatch, Witness Kit). A search bar is located at the top of the panel.

- Folder access.
- Static Folders (My Folders, Shared, Public - created by users).
- Based on data fields or searches.

An information icon (i) is followed by the text: "Point to the folder and click the Triangle to access the Folder menu." Below this, a screenshot shows a folder named 'For Further Review' with a mouse cursor pointing to a small triangle icon next to it. A context menu is open, showing options: 'New', 'Edit', 'Compare', and 'Delete'.

## REVIEW

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

Standard Review : Initial Firs... Show Only: Not Updated Release Updated: 10 Get More Documents Save Search

Search Text: Found: 89 (Search)

Filters Table Charts Communication Explorer Communication Report Communication Tracker Size

Display: Default Display Sort: BegControl ^ BegAtt Records/Page: 100

DocId	FamilyCount	ReviewStatus	Issues	Comments	HasRedactions	From To	SentDate
STK000000082		NotReviewed				Elizabeth Linnell	

Show Only: Not Updated Release Updated: 10 Get More Documents Save Search

Found: 89 (Search)

- Access Review Projects.

- Release Updated documents and Get More Documents to review.

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

## REPORTS

Reports

Indexing Exceptions

- File not found: 40,088
- File too large: 4
- File password protected: 0
- No searchable text (tiff, bmp, jpeg, etc.): 533
- Content modified due to size: 0
- Other exceptions: 767

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

## JOBS

- Links to different types of jobs.

Jobs

Export

Filters

By Status:  Pending  In Progress  Completed

By Job Type: All

By User: All

Copy to Folder

Remove From Folder

Update Fields

Lock

Unlock

Review Bulk Update

Update Collections

Generate Sample

Copy Ranked Documents

View Ranked Documents

- Use Filters to narrow in on the information you need.