OnDemand Admin Guide

Version: 11.7.0.0

Power through High-Stakes eDiscovery with one Platform

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1 Getting Started

1.1 VenioOne OnDemand Overview

VenioOne OnDemand (VOD) is a browser-based, self-service add-on to the unified VenioOne eDiscovery platform. VOD may be used in all phases of the e-Discovery process - upload, process, early case assessment, analysis, review and production.

This Admin Guide helps you understand VOD and provides you with the easiest and best ways to work with and administer VOD. If you still have questions, don't worry! We are always here to assist you. Contact our technical support team.

1.2 Features

The major features of VOD are:

- Upload - Upload and process data
- Analyze - Graphic view of processed data and tools to examine it
- Review – Tools for ad hoc and linear review of documents
- Produce – Export documents in one of several formats
- Reports – Generate both administrative and user reports
- Collaboration – Share with or invite internal and external users to upload documents

1.3 Prerequisites

Your VenioOne instance must be set up for VOD prior to users being able to work in VOD.

To start working in VOD:

Email configuration must be set for Admin user in the VenioOne Desktop Console.
All the repositories must be created for Upload, Project and Export locations and those need to be updated in the control setting table with reference to the FSID in the fileServerInfo Table.

Example:

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```
select * from tbl_pj_fileserverinfo
```

Results | Messages

	FSID	FSDisplayName	FileServer	FSUserName	FSPassword	FSDomain	authenticate	SharedFolder	FastFile
1	1	Input	100.100.100.9	manager	b/kglMAeDgE=	100.100.100.9	1	\\100.100.100.9\Dristi Development\Venio_QC	NULL
2	2	Output	192.168.169.167	nimmi	SR6N158mqLnwZRwHY/2xEQ==	192.168.169.167	1	\\192.168.169.167\VShared	NULL
3	3	Export	192.168.169.182	dristi	VKmplUwy0rXVaReNFP4o8Q==	192.168.169.182	1	\\192.168.169.182\Export	NULL
4	4	Output2	192.168.169.193	jyoti	baGkWia1kWBqTELnvu4C4A==	192.168.169.193	1	\\192.168.169.193\VShared	NULL

```
select * from tbl_pj_ControlSetting where [key] like '%location%'
```

Results | Messages

ControllerID	Key	Value
5	{VenioNotificationLogoLocation}	http://www.veniosystems.com/images/VoneLogo.
83	{NotificationLogoLocation}	http://www.veniosystems.com/images/VoDLogo.p
93	VOD_PROJECT_LOCATION	2
94	VOD_EXPORT_LOCATION	3
95	VOD_UPLOAD_LOCATION	1
115	VOD_UPLOAD_IN_PROJECT_LOCATION	0

Two control setting keys need to be updated in the tbl_pj_ControlSetting table:

- WEB_BASE_URL
- VOD_API_URL

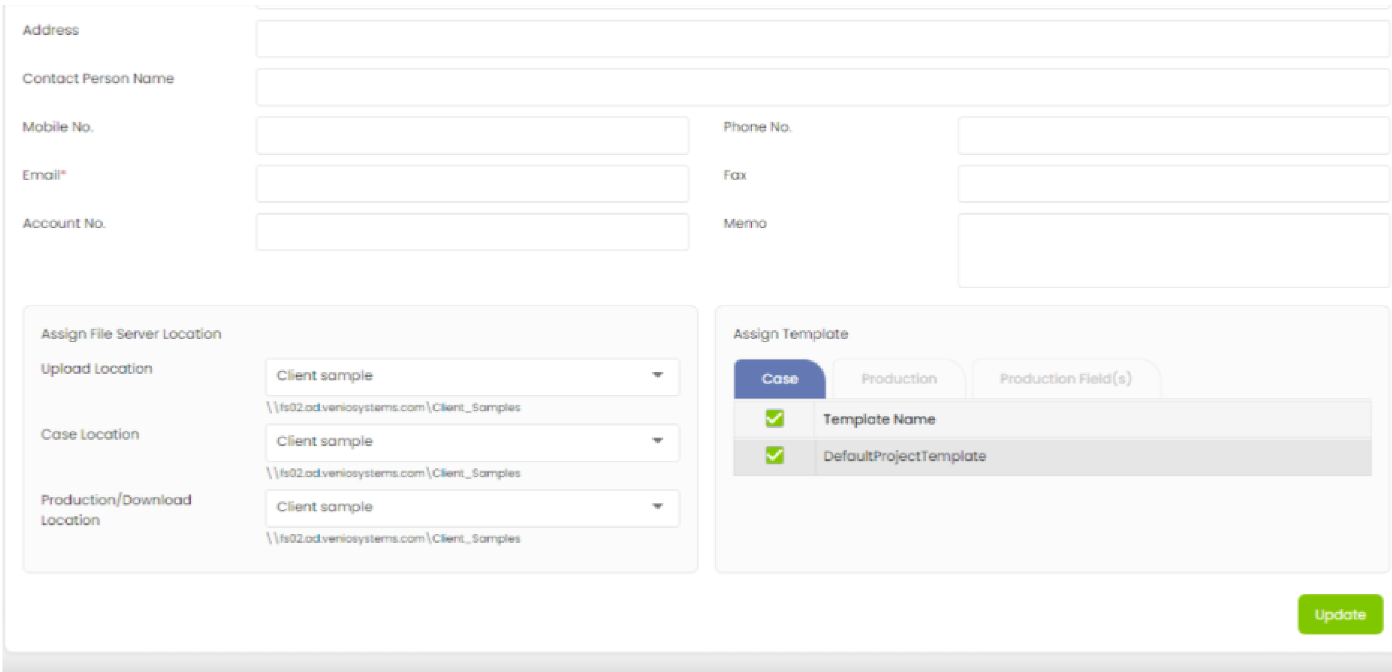
The default values can be updated using the following query and replacing the bolded text with the actual URL values.

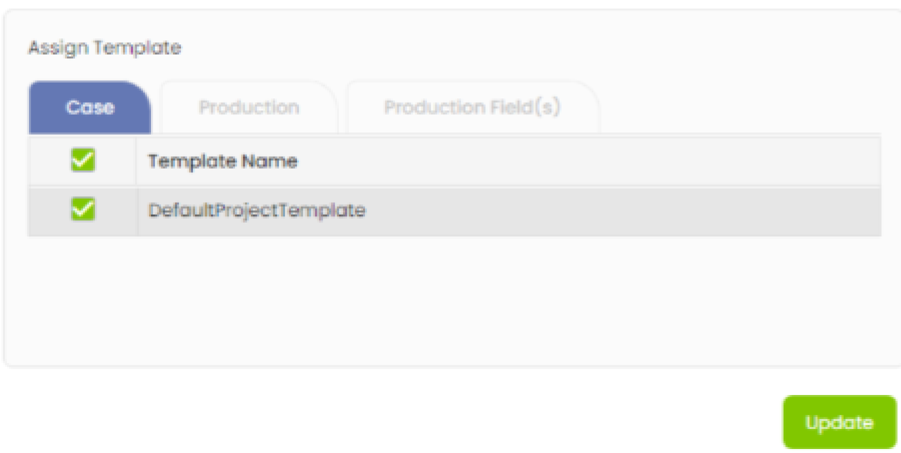
- UPDATE tbl_pj_ControlSetting SET [Value] =<web API url> WHERE [Key]= 'VOD_API_URL'
- UPDATE tbl_pj_ControlSetting SET [Value] =<base web url> WHERE [Key]= 'WEB_BASE_URL'

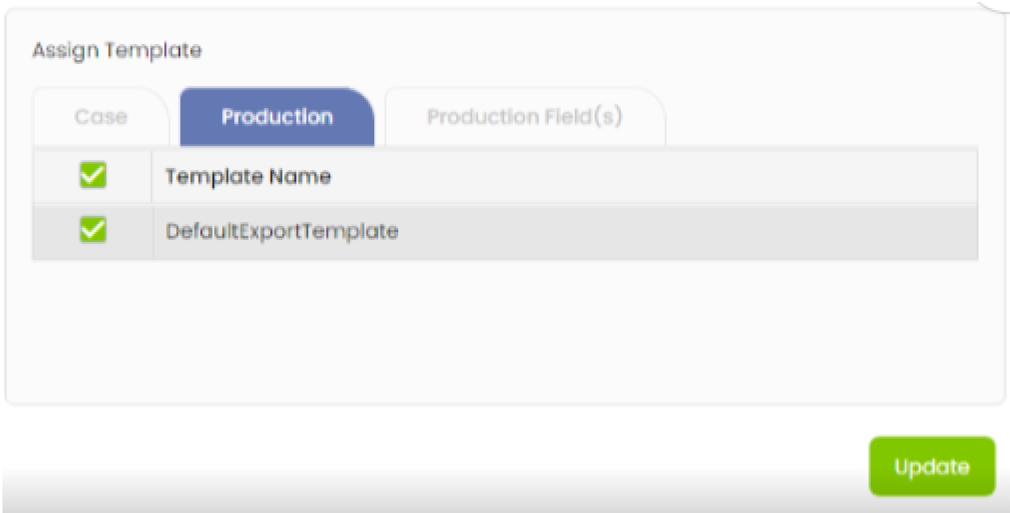
1.4 Template Settings and Client Management

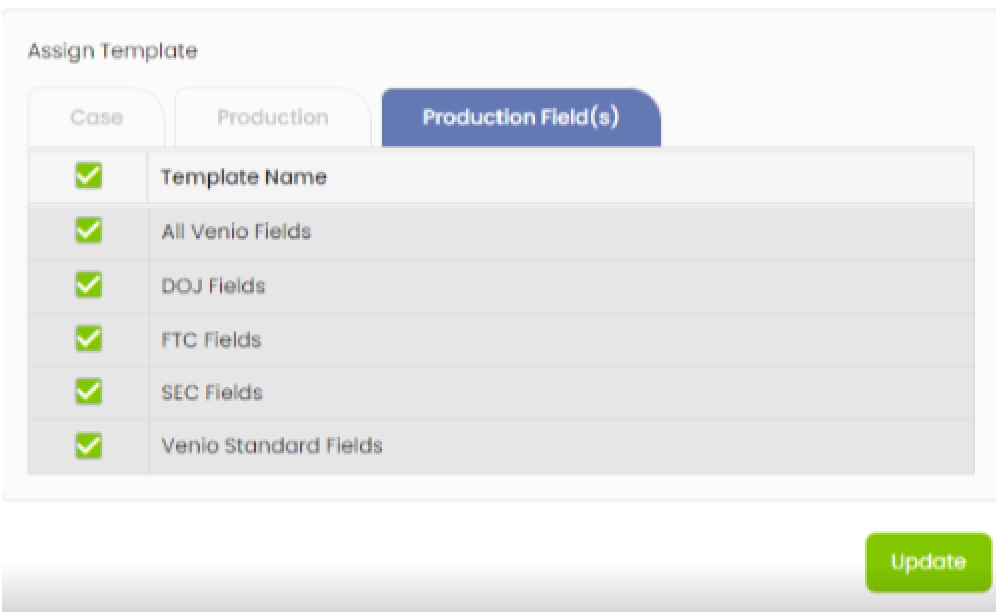
1.4.1 Project Template Settings

The default Project Template(s) must be set for the client in the VenioOnDemand. You may also create a new template and apply the new template for the client. You can configure the client by navigating to Admin Settings →System Admin→Client Management→Create.


Address
Contact Person Name
Mobile No.
Phone No.
Email*
Fax
Account No.
Memo
Assign File Server Location
Upload Location
Client sample
\\fs02.ad.veniosystems.com\Client_Samples
Case Location
Client sample
\\fs02.ad.veniosystems.com\Client_Samples
Production/Download Location
Client sample
\\fs02.ad.veniosystems.com\Client_Samples
Assign Template
Case
Production
Production Field(s)
Template Name
DefaultProjectTemplate
Update


Assign Template
Case
Production
Production Field(s)
Template Name
DefaultProjectTemplate
Update





1.5 Login and Logout

1.5.1 LogIn

You can login into the platform if either of these types of login is enabled:

- Normal LogIn
- Active Directory Support

1.5.1.1 Normal LogIn

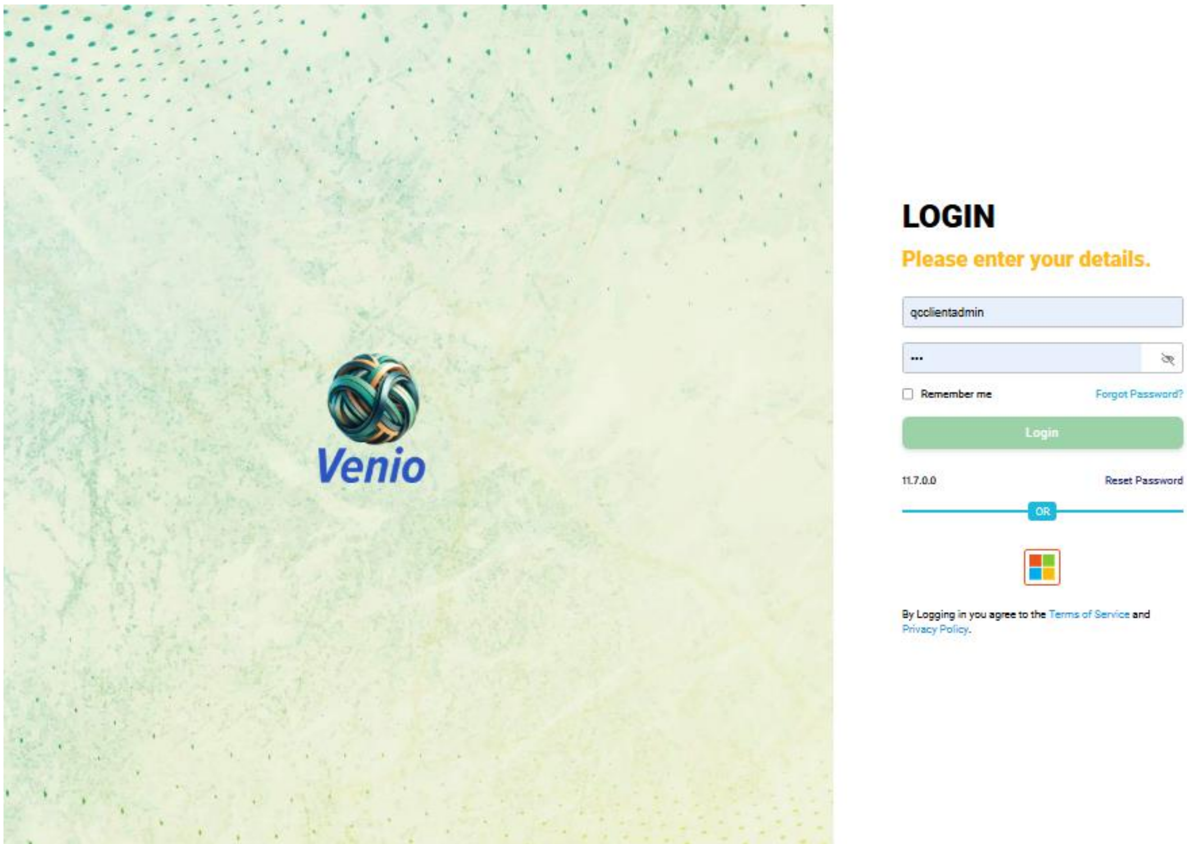
To access and login into VOD:

Open your browser and enter the URL for the application.

NOTE: The URL is in this format: http://<HostName>/VenioWeb/ondemand

The Login dialog will be displayed.

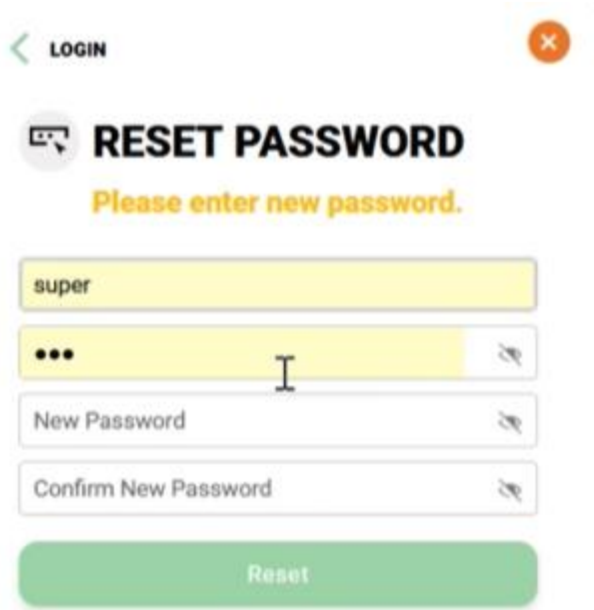
1. Enter your Username and Password. If you have 2FA enabled, a verification code will be sent to your email id, enter the code.



2. Click the Login button to login to the system.
   User will be directed to the Two Factor Authentication page if it is enabled. If not, the user will be directed to the Case Launchpad. On initial login, the user will be directed to the End User License Agreement screen.

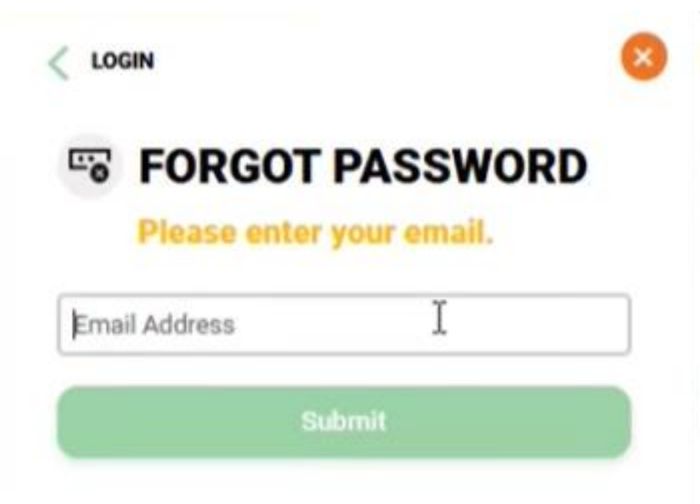
When an invalid Username/Password are provided, you will receive a Login Failed notice.

If you want to reset the password, click on Reset Password.



You need to enter the username, old password, new password, and the same new password in confirm new password text box. If the entered information is correct, on clicking the Reset button, the password will be changed. The criteria for new password is that it must be atleast 8 characters long, include an uppercase letter, lowercase letter, a number, and a special character (for example – 1234@yaJa).

You can also click on Forgot Password to reset the password. On clicking Forgot Password, enter your email id and click on Submit button.



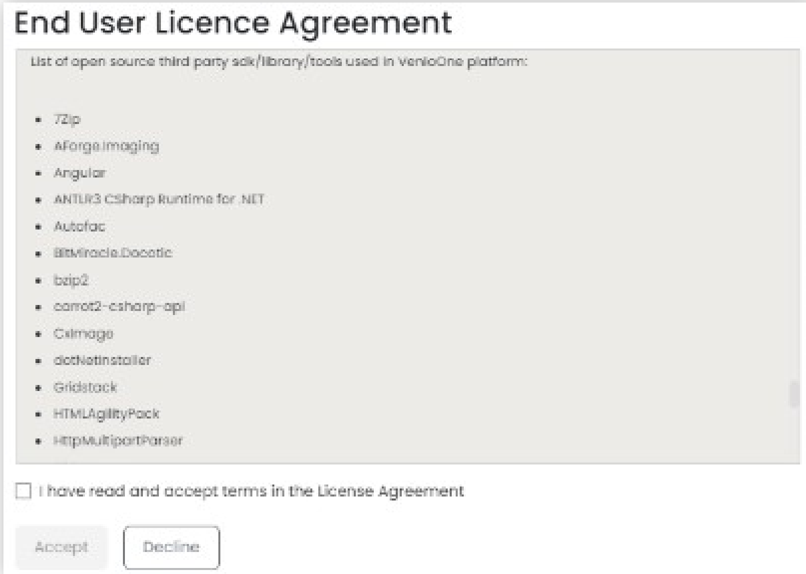
This will send an email with reset link. Click on Reset link, enter the new password, and the same password in confirm new password text box, and click on Change Password.

If your password is expired, you will be prompted to enter the old password, new password, and confirm new password to reset the password.

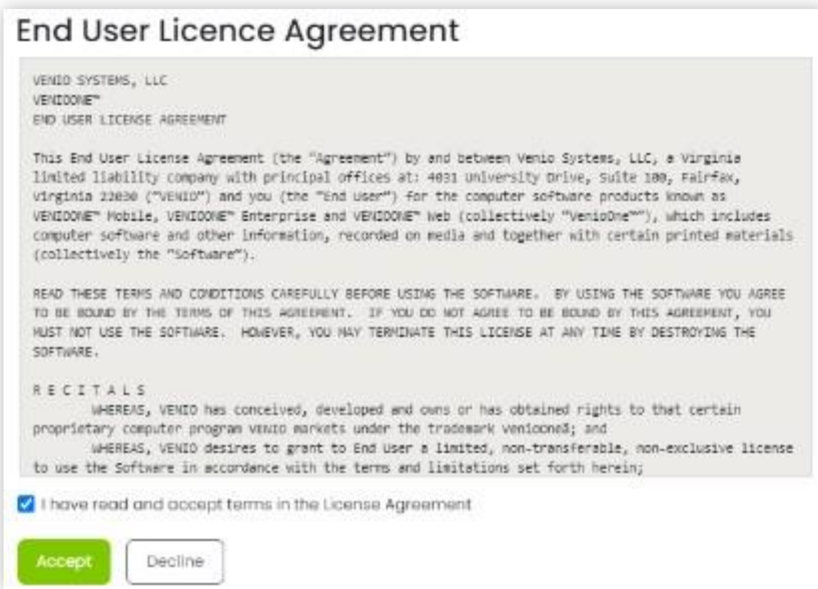
1.5.1.2 EULA Acceptance Screen and Open Source Software (OSS) License

When a new user clicks the Log in button, the End User License Agreement acceptance dialog is displayed (as shown below). The Accept button is enabled only after the "*I have read and accept terms in the License Agreement*" option is checked.

Additionally, a link for the Open Source Software license is available for every user on initial login at the end of the EULA dialog. Click the link to find the list of free and open source third party SDKs/libraries/tools used in the VenioOne platform.



After the Accept button is clicked, the user will have access to VOD and the screen will not be shown during the next login.



1.5.1.3 Two Factor Authentication (2FA)

2FA is used for security purpose. If 2FA is enabled, after entering your login credentials, you will receive an email containing an authentication code, which will be required to complete a secured login to VOD.

Within the 2FA dialog, you will have the option to have the code remembered for 30 days by selecting Do not ask on this computer for the next 30 days.

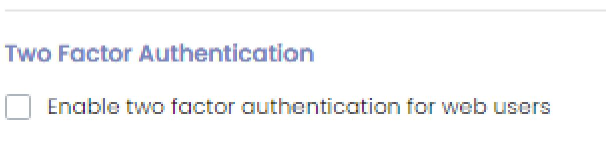
After entering the verification code, click the Verify button to login.

NOTE: If issues are encountered, click the here button to resend the verification code or you may want to try clearing the browser's cache.

1.5.1.3.1 Enabling/Disabling 2FA

The 2FA feature is enabled or disabled from the VenioOne OnDemand.

1. Login to the VenioOne OnDemand.
2. Under System Admin, navigate to Login Management, and click the Login Settings button.
3. To disable 2FA, uncheck Enable two-factor authentication for OnDemand users. Click the Save button.



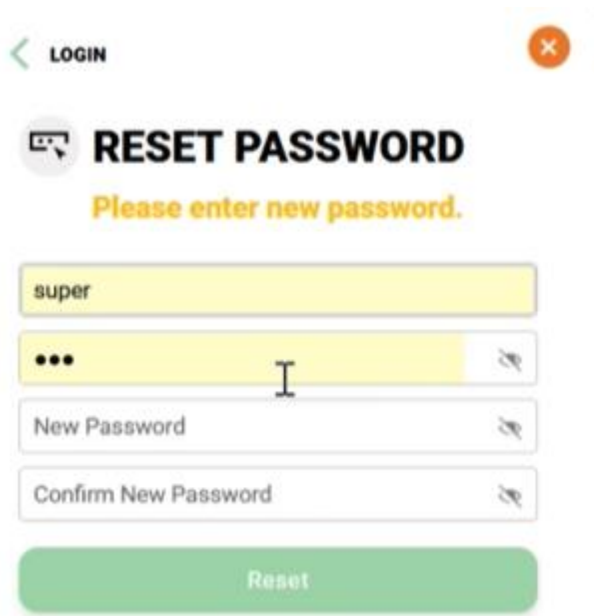
1.5.1.4 Active Directory Support Enabled

The personal user login credentials may be used if Active Directory Support is enabled in VenioOne's login settings. If Active Directory Support is enabled, then the Windows Security dialog will be displayed for user login.

Enter your AD domain Username and Password. Click Ok.

1.5.2 Reset the Password

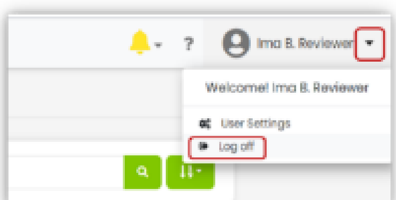
If you want to reset the password, click on Reset Password.



You need to enter the username, old password, new password, and the same new password in confirm new password text box. If the entered information is correct, on clicking the Reset button, the password will be changed. The criteria for new password is that it must be atleast 8 characters long, include an uppercase letter, lowercase letter, a number, and a special character (for example – 1234@yaJa).

1.5.3 Logout

To log out of VOD, click the arrow next to your username in the top right corner of the page, and select Log off to sign out.

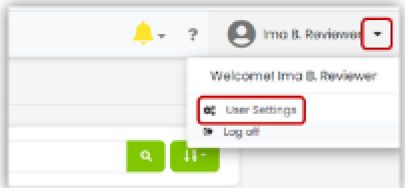


1.5.4 Change User Password

You must be signed in to change the password.

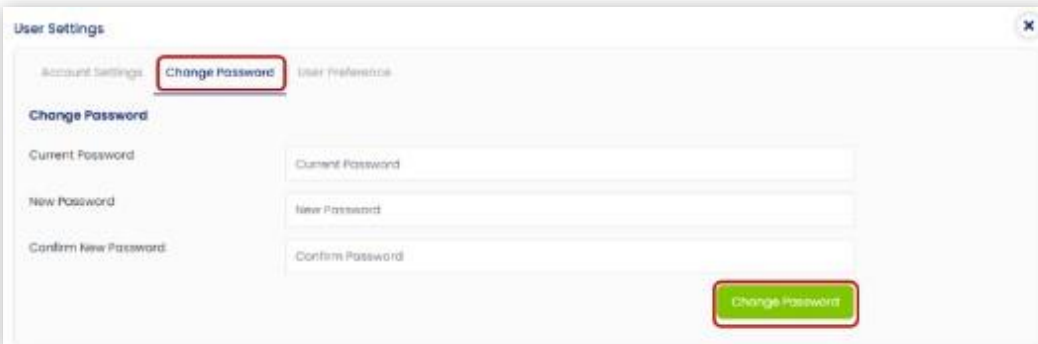
1. Click the arrow next to your username in the top right.

Click User Settings



The User Settings dialog will be displayed.

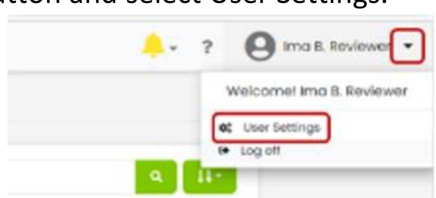
Click the Change Password tab.
Enter the old password and new password in the indicated fields
Click the Change Password button.



A message will display to indicate a successful password change.

2 Set User Preferences

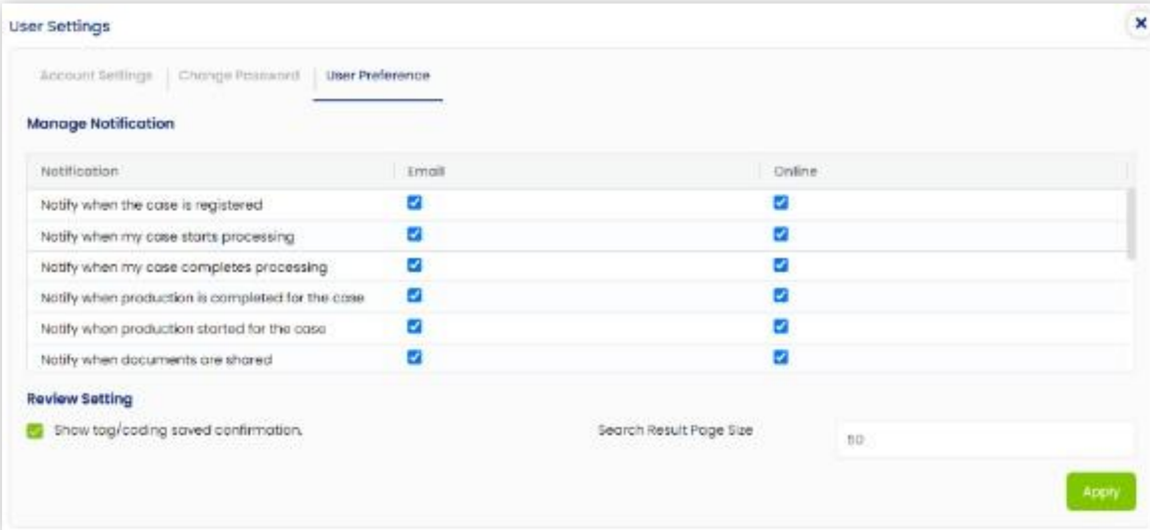
In the top right corner, click Menu button and select User Settings.



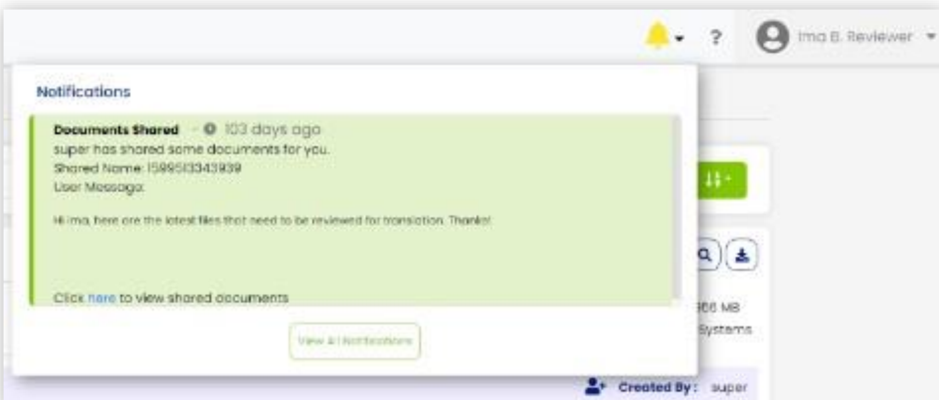
2.1 Notifications

On the User Preference tab in the User Settings dialog, check the desired notifications you wish to receive and click the Apply button. You will receive notifications according to the options enabled.

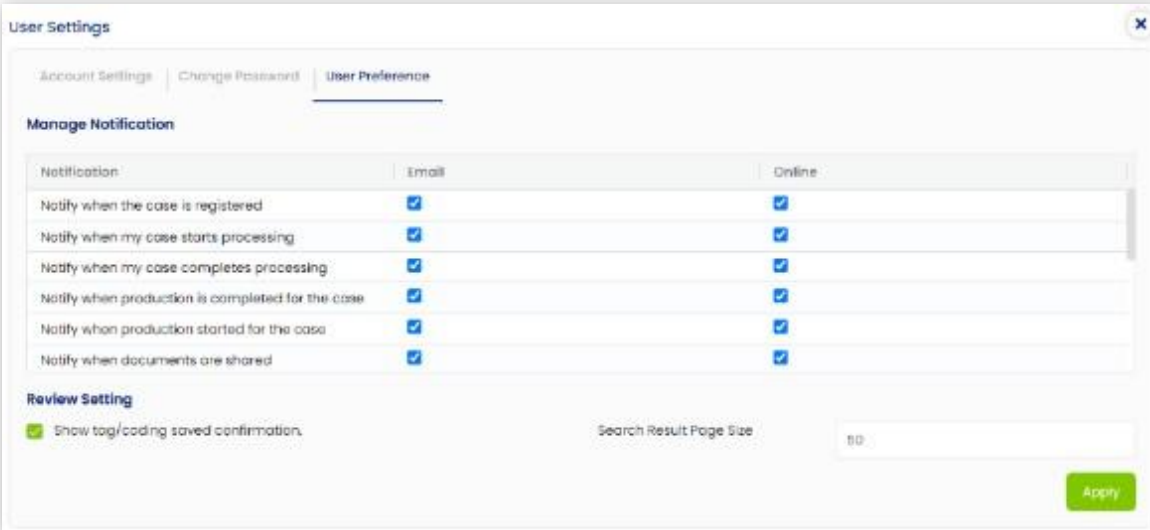
- If Email options are enabled, you will receive notifications via Email.
- If Online options are enabled, then you will receive notification within VOD.



New notifications will be shown using the notification bell in the top right corner as shown below.



2.2 Review Settings



At the bottom of the User Preference tab in the User Settings dialog are two Review Settings:

- The Show tag/coding saved confirmation checkbox controls whether you see a confirmation when tag(s) or coding changes are saved.
- The Search Result Page Size field controls how many items will be displayed on each page of the Search Results.

3 Creating and Opening a Case

After logging into the application, if no cases have been created, you will see the message *No cases found. Please add new case.* Otherwise, you will see the list of cases created previously.

3.1 Two Types of Cases in VenioOne

VenioOne has two options for creating cases in VenioOne OnDemand: TOA (Text only analysis) and Extract Native. The two case types are handled very differently, so be sure to familiarize yourself with the specifics of the two case types detailed this section.

- *Extract Native* projects do what most people expect when ingesting and processing data for an eDiscovery project. The Native files are extracted and processed to create Full Text files in the project location and both files are available for review.
- *TOA* projects are designed for in-house text only analysis before a project is sent to outside counsel or a service provider. With *TOA* projects, after ingestion and postprocessing completes, the Native data is deleted from the project location after the

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Task Synchronizer Task Scheduler runs. This means that only the Full Text files are available for review. This saves on the storage space required for the project.

IMPORTANT: For the TOA option to display during case creation, a *Native Indexing* license must be applied in VenioOne's License Manager. The ingestion engine for TOA projects will be set to FALLBACK by force even if the ingestion engine in the Control Setting table is LEGACY.

IMPORTANT: If the Task Synchronizer was not installed while installing the Venio Console, the files will not be deleted from the case's native location during post-processing. Go to the Venio install location and check the Venio Task Synchronizer to ensure its INI file is pointed to the correct PCD.

3.2 TOA Case Specifics

The following are important differences with TOA cases:

- Within the VOD Review Dashboard, only the Full Text Viewer is available. Because of the limited processing with TOA cases, there will be no Native or Image File Viewer.
- During review of the files in an TOA project, if a child file is tagged, only the parent file is actually tagged when the tags are saved. This is done so that when exporting, parent and child documents are exported, but only the parent files are tagged.
- With TOA projects, only Native files are included in exports.
- The *TOA* option is only available in case creation if a *Native Indexing* License is installed in the Venio License Manager. Native Indexing will either show 0 or 1 licenses versus other Venio licenses, which may be issued in multiples.

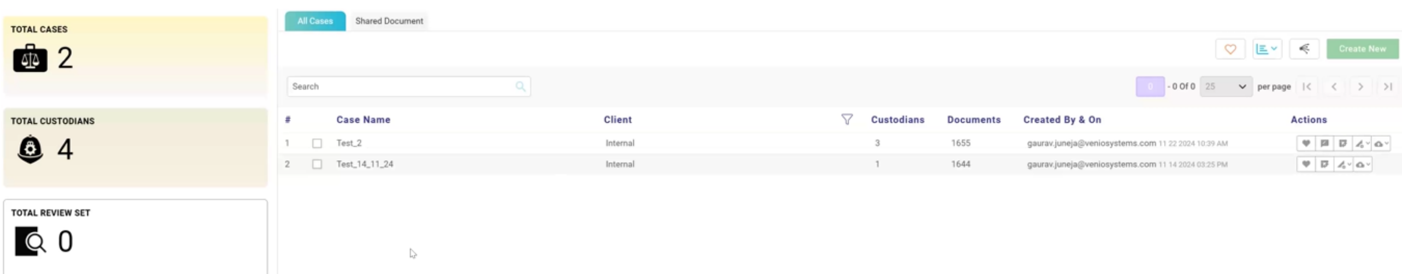
3.3 Where TOA Case Changes Appear in VenioOne:

- License Manager - *Native Indexing* license shows 1 license
- Create Project
    - Create TOA option selected
    - Removes image conversion options
- Review Dashboard
    - Only *Text Viewer* shows (no image, full text, etc.)
    - *Other Options* - Several options are grayed out.
    - Tagging - When tagging child documents, only the Parent document is updated when the tag is saved
- Export
    - All *Advanced Options* related to imaging are grayed out

- Option to export files with the original folder structure and file name is available
- Will see message about *FullText* and *Images* not being produced - this is expected, because only Native files are exported
- Will show items on the *Export Status* tab, but they will not be present in the Export file location

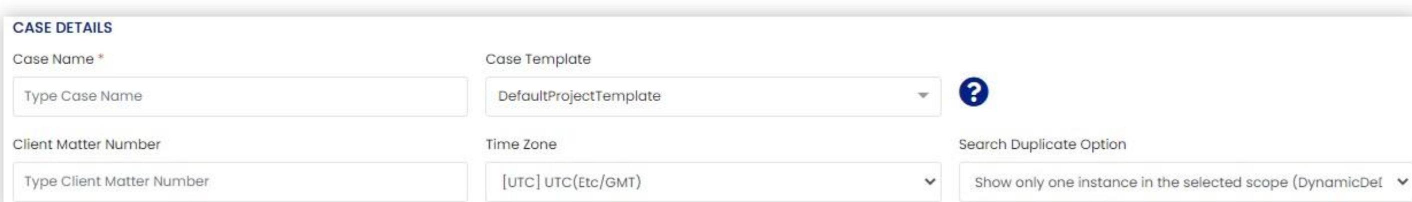
3.4 Creating a Case

You may create a case by providing only the Case Name. You may choose to enter additional information using the Advanced Options.

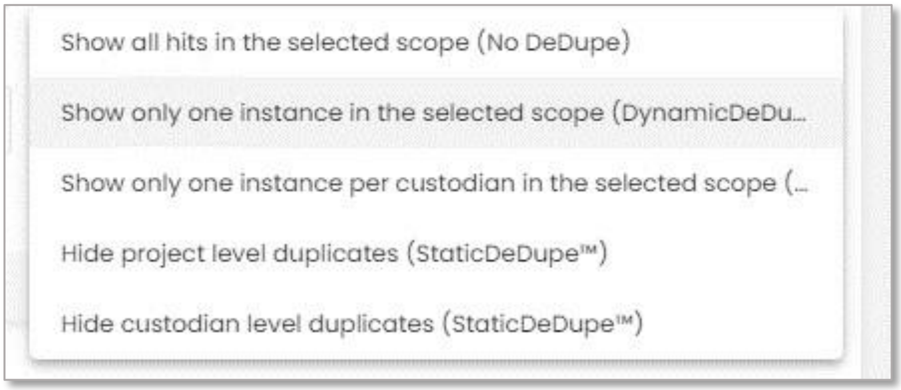


You may create a case by providing only the Case Name. You may also choose to enter additional information using Advanced Options.

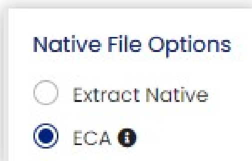
1. Click the Create Case button.
2. Enter the Case Name
3. Select a Case Template from the drop-down menu to determine how your data is processed and project options are handled.
4. OPTIONAL: Click the Advanced Options link and set additional options (detailed in the next section).
5. Click the Create Case button to create new case/project. The Case Details section appears:



- Client Matter Number
- Time Zone – Sets the time zone for processing
- Search Duplicate Option – Sets how deduplication will be handled when searching



- Native File Options - If DISABLE_AUTO_PREFETCH =1 in the control setting table, then the Native File Options will be visible under Advanced Options while creating projects in VOD.



If Extract Native is selected, the native files will be present in the Native folder in Project Location and all workflows will be normal.

If TOA is selected, then after post-processing, the files will be deleted from the Native folder. However, the full text files will still load in the Document Viewer and may be exported and searched successfully. Also, the Image Conversion Options (described below) will not be visible. See Section 3.1 above for more information on creating TOA cases.

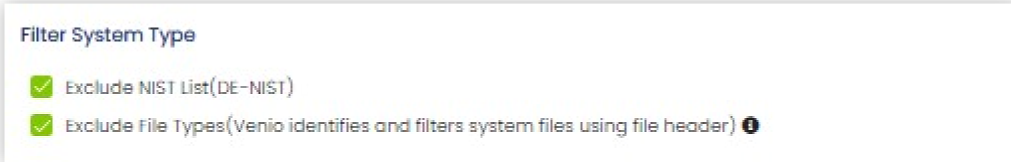
3.4.1 State Error

When there is state error in the systems, there is link for the state error in the case launchpad as shown in the image below, and when you click on it, the corresponding detail for the case is displayed.

3.4.2 More Options

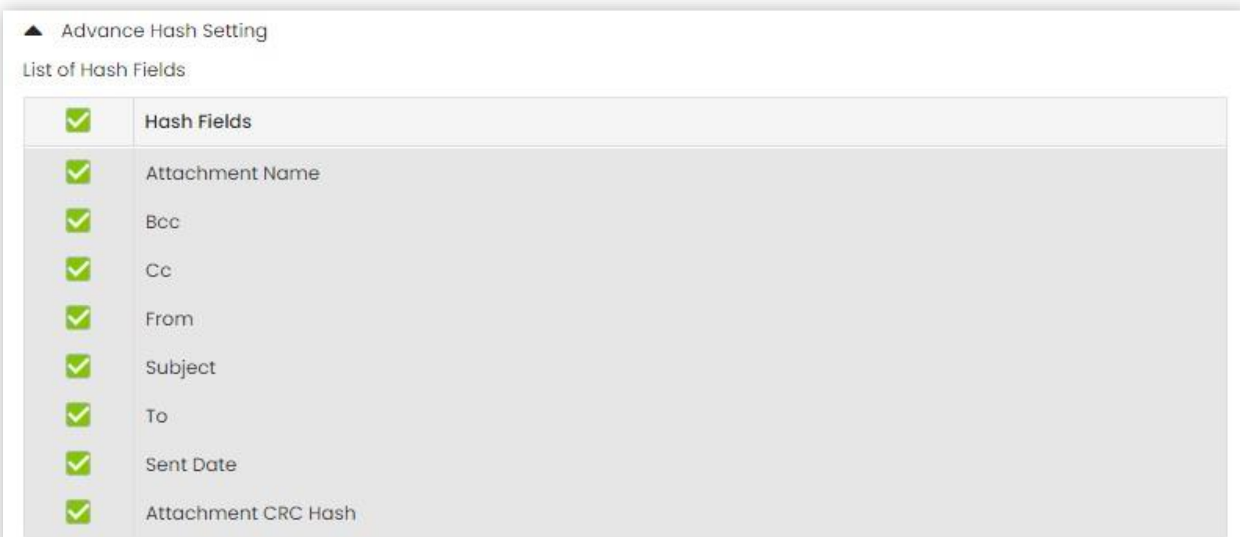
The More Options section displays the following additional options. You may choose to provide the following information: File Filters

- Filter System Type – Helps you to filter files based on the file types or NIST.



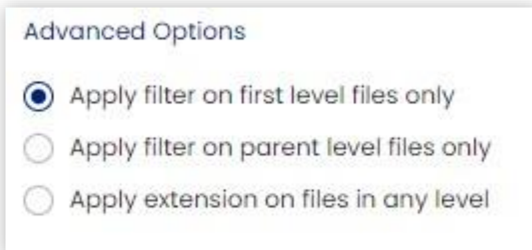
- Filter Duplicate Files – Select one of the radio buttons to use the hashing algorithm for ingested documents. You can select the check box if you want to compute and store secondary hash value in database.

- Advanced Hash Setting - You can select advance hash setting where there is meta of the emails to be selected for calculation of the hash value.



- File Extension filter - There are two options in file extension filter, namely Include and exclude. The extensions that need to be included should be selected as Include and enter the list of the extension. The extensions that need to be excluded should be selected as Exclude and enter the list of the extension.

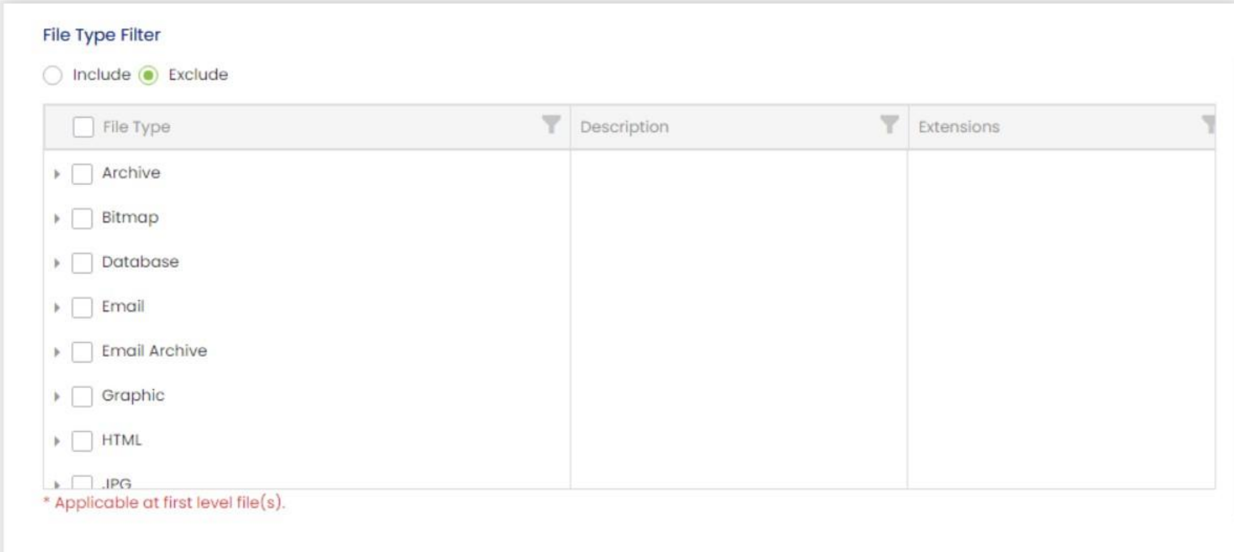
- Advanced Options - In the advance option, the filter can be applied to first, parent level files. The extension can be applied on files in any level.



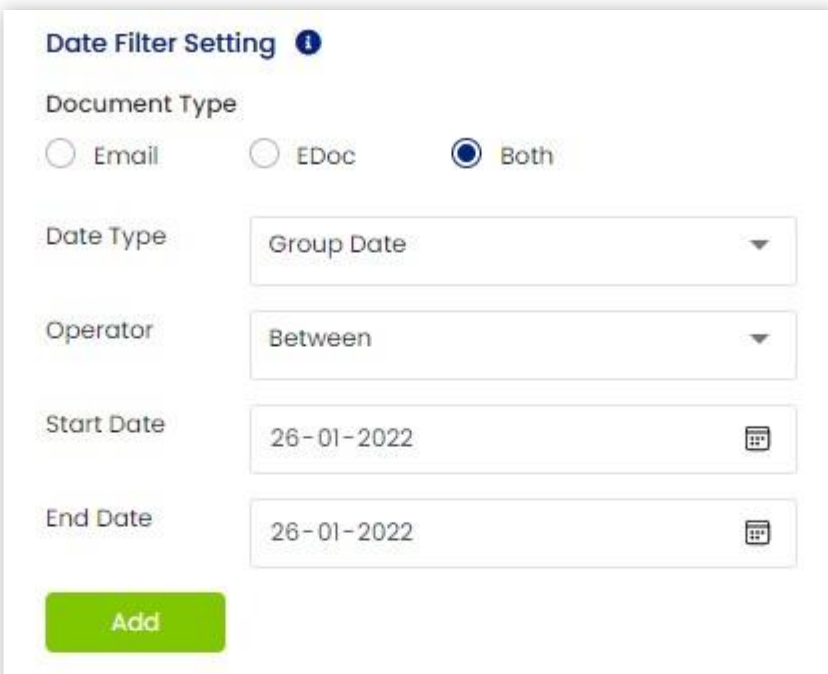
  - Apply filter on first level files only - Applicable at first level file(s).
  - Apply filter on parent level files only - Applicable at parent level file(s)
  - Apply extension on files in any level - Applicable at first level file(s).

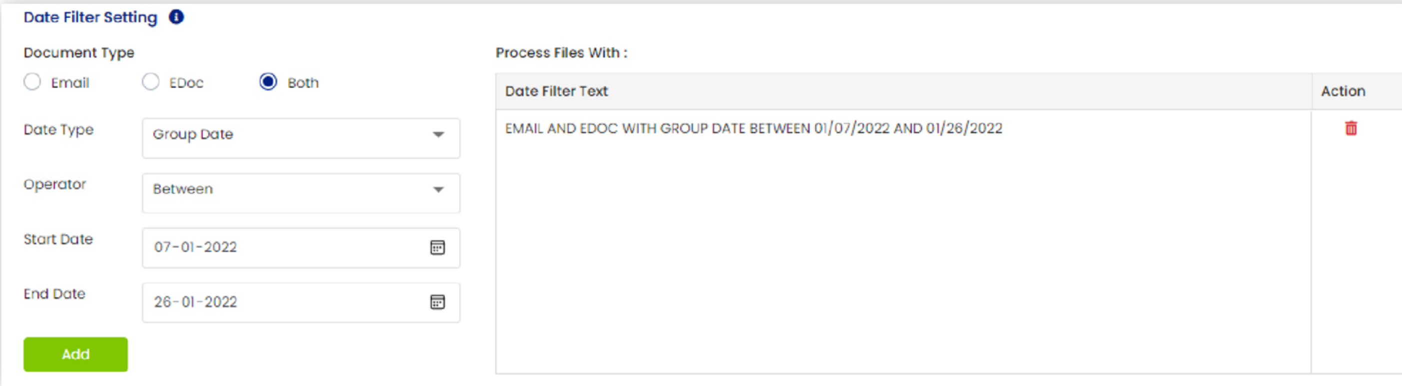
Note: (Container file(s) will not be filtered) **DO NOT apply filters on container file** option is available for files in any level only. (container files will be processed as a folder when checked)

- File Type Filter – Use this option to filter by file type either including these files or excluding these files.



- Date Filter Settings – Set the date filter using the settings in this window. The Document Type can be Email, EDoc or Both. The entry made by Edoc, Email and both should be visible in the Process files with panel. You can select Group Date from the Date Type drop down menu, and the Operator as Before, After, Equals to, or Between from the dropdown menu. Select the Start Date and End Date from the calendar.





- Embedded Item Setting – This option is used to filter embedded items in Email, Edoc and Powerpoint.

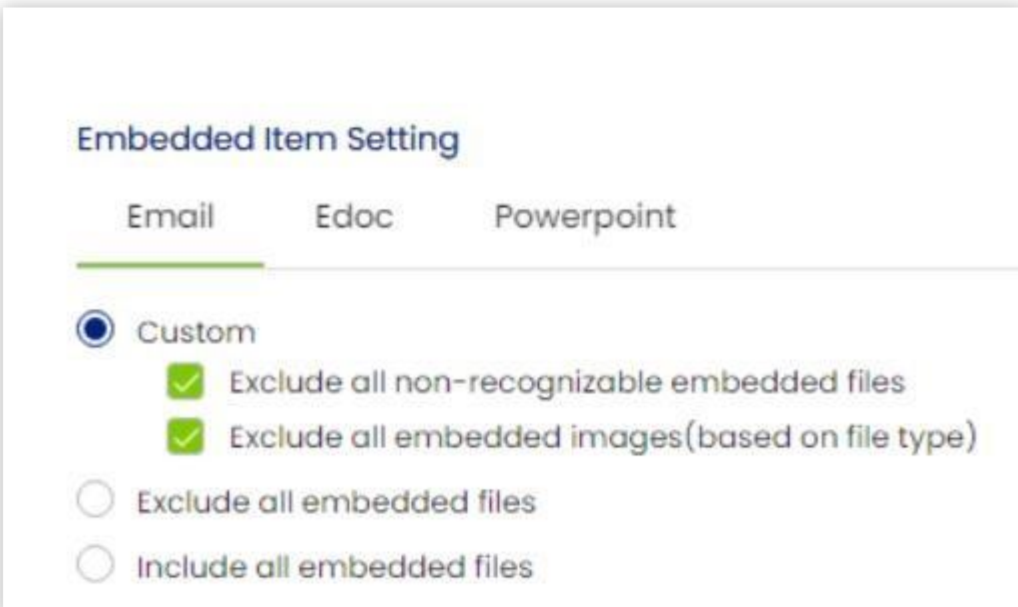
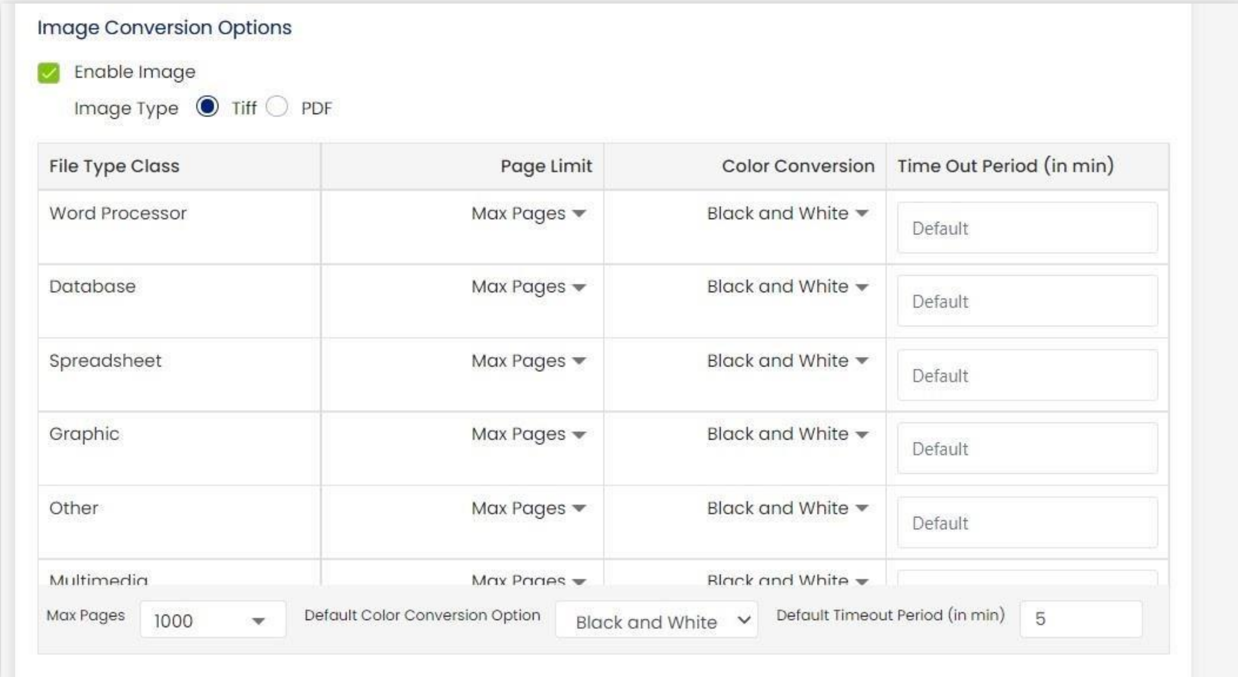


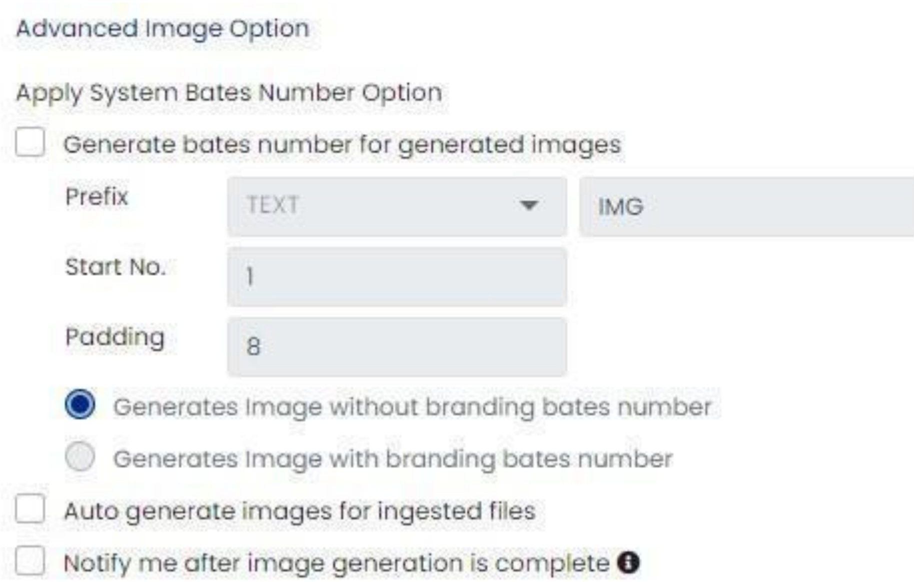
Image Settings

- Image Conversion Options – Auto-generate images for ingested files



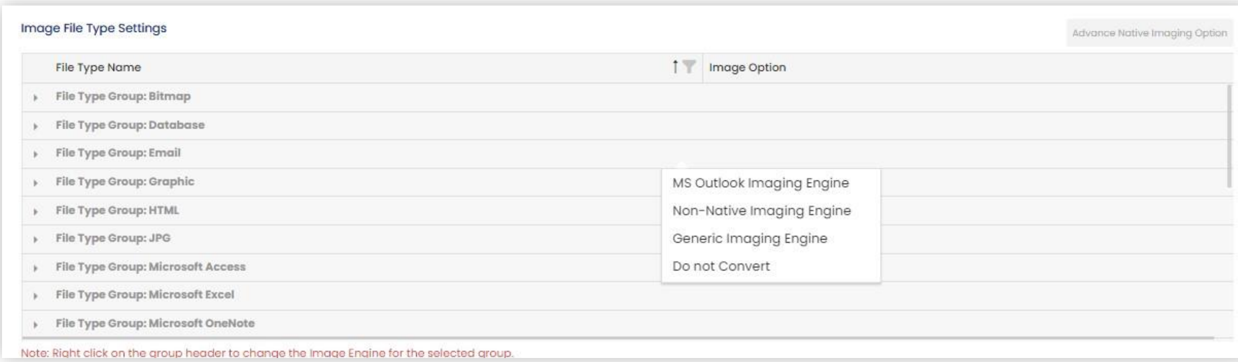
From the image conversion option, you can either enable or disable "Enable Image" option. You can also choose the Image type as "Tiff" and "PDF", and set the page limits to 100, 200, 500 or 1000. You can also change the "Default color conversion option" and "default timeout period".

- Advanced Image Option –

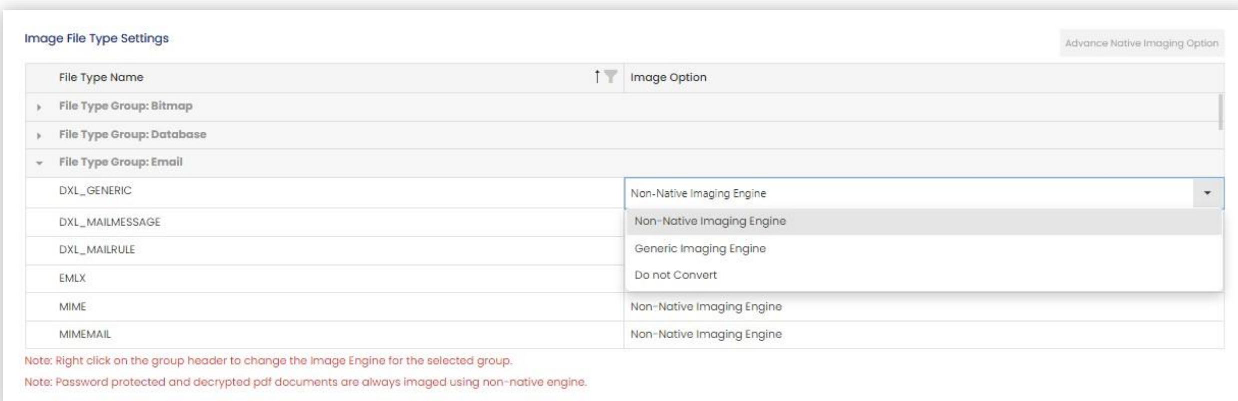


- Image Conversion Options with TOA license – For TOA, the Tiff image type is not available, hence it is unchecked and disabled.

- Image File Type Settings - The option is used for settings which engine to use while imaging the document. To view the list the engines to be used, right-click on the filetype group.

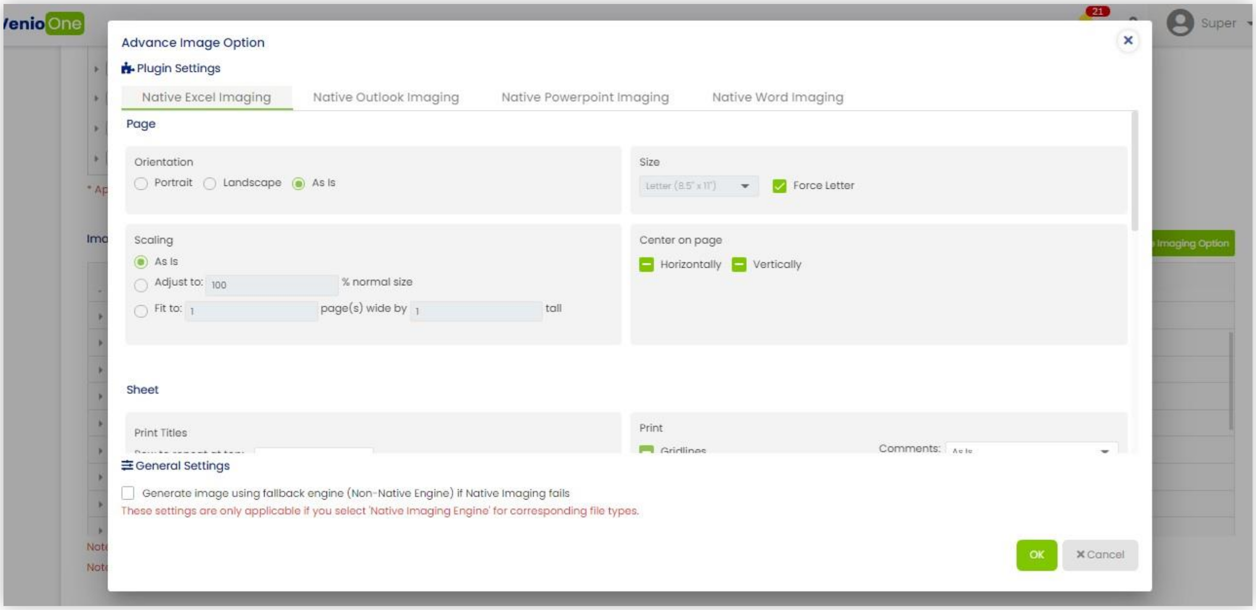


You can select from the available options for the imaging engine. When you click on the arrow on the filetype, it lists all the related filetypes. The drop-down towards the right displays a dropdown displaying the imaging engines which can be used individually.



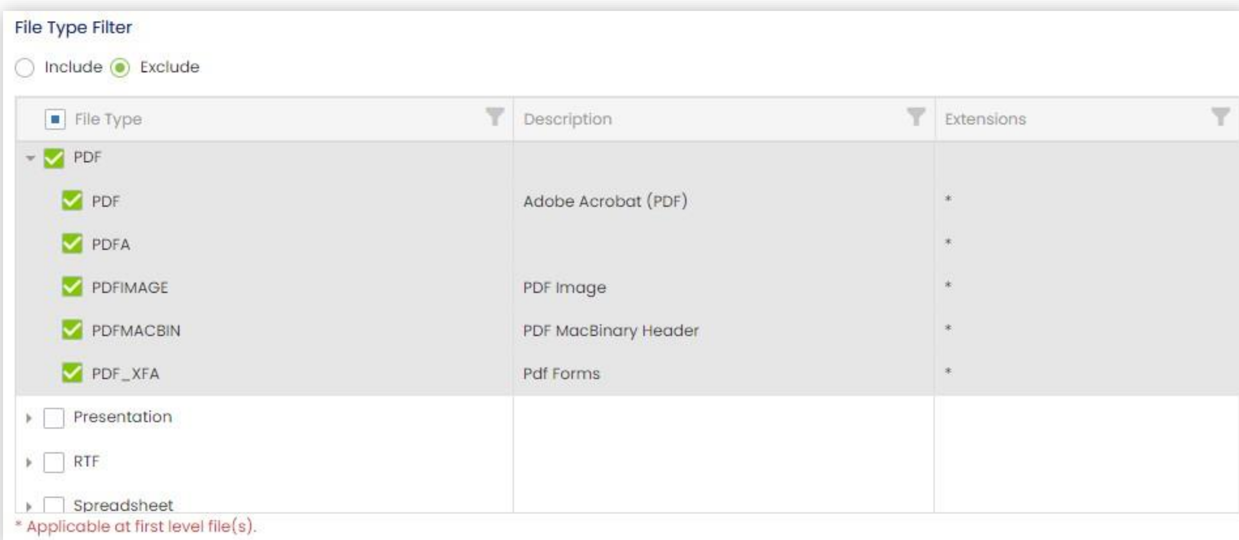
When you select the native engine (Outlook, PDF, MS Word, MS Excel, and MS PowerPoint), the Advance Native Imaging option is enabled.

The Advance native Imaging option has tab for Native Excel Imaging, Native outlook Imaging, Native PowerPoint Imaging, Native word imaging. The user can select different options from the tabs

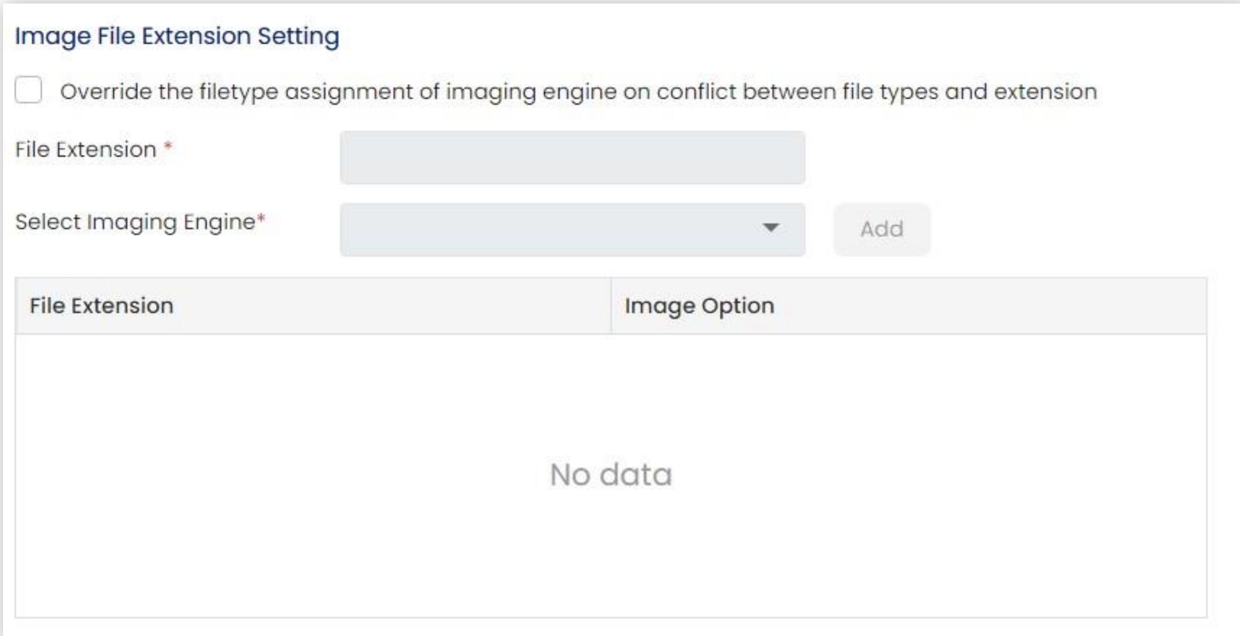


- File Type Filter - Select File Filter Type to filter files by identified file type.

- Include: Process documents which match listed file type.
- Exclude: Process documents except listed file type.

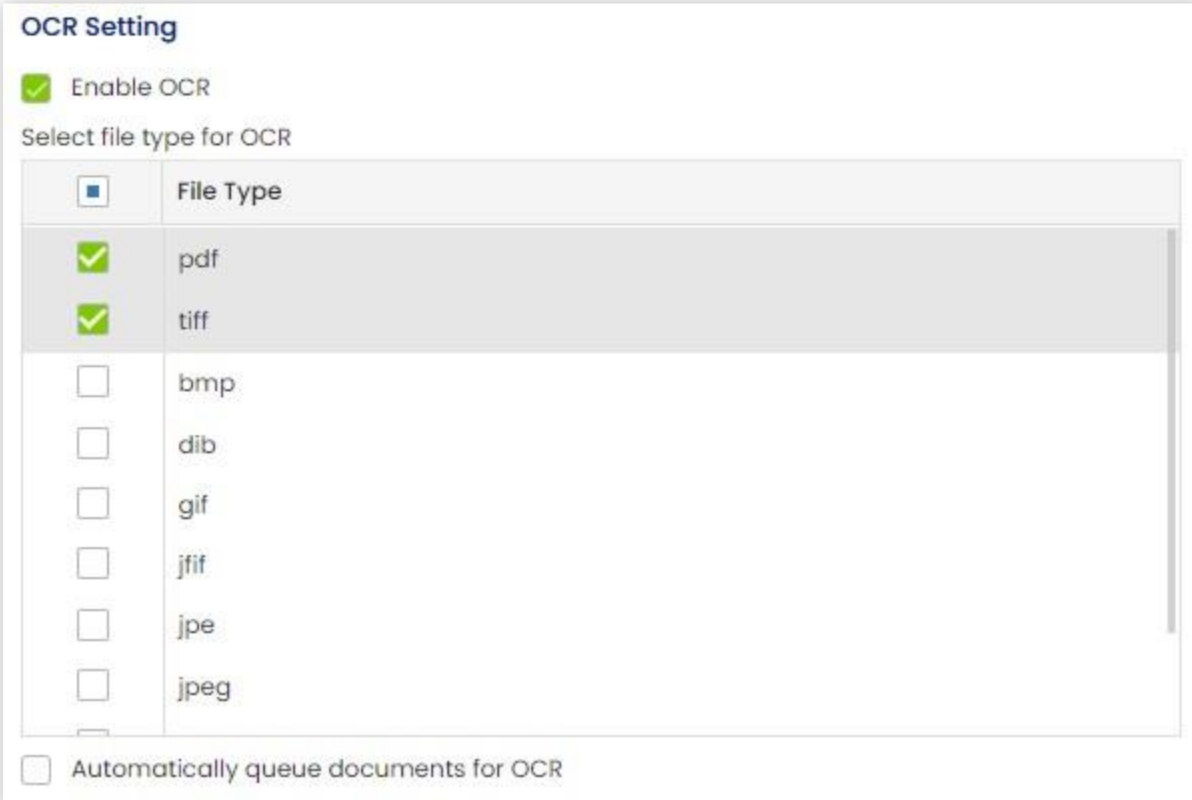


- Image File Extension Setting – This section is used to provide/specify File Extension and Imaging Engine details. The details are reflected in the below panel.



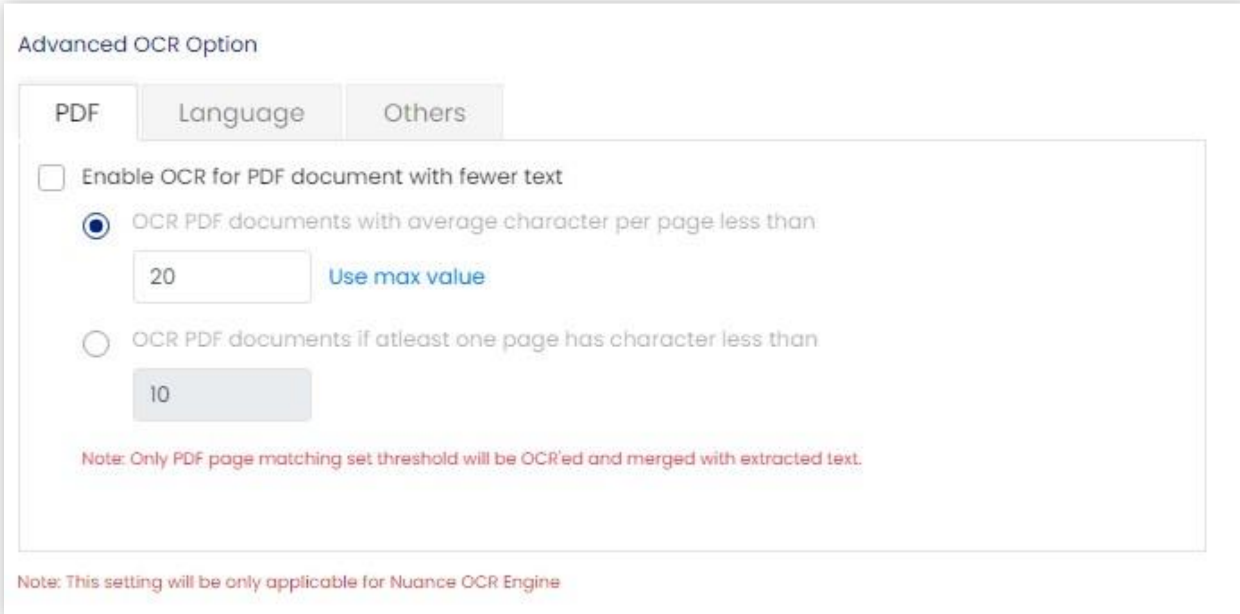
OCR Settings

Select the file types which are needed to be OCRed. You can also choose to auto queue the files to OCR while ingestion is in progress.



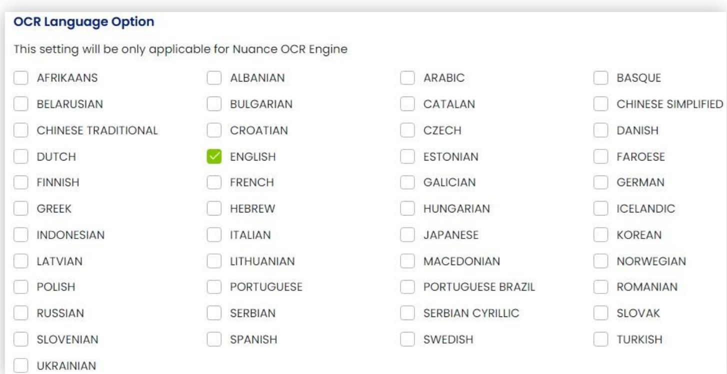
- Advanced OCR Option - ○ PDF - You can select the PDF document with fewer text. You can select from the following two options:
  - OCR PDF documents with average character per page less than 20 or can select max value.
  - OCR PDF documents if at least one page has character less than 10.

If one option is selected, the other option gets disabled.

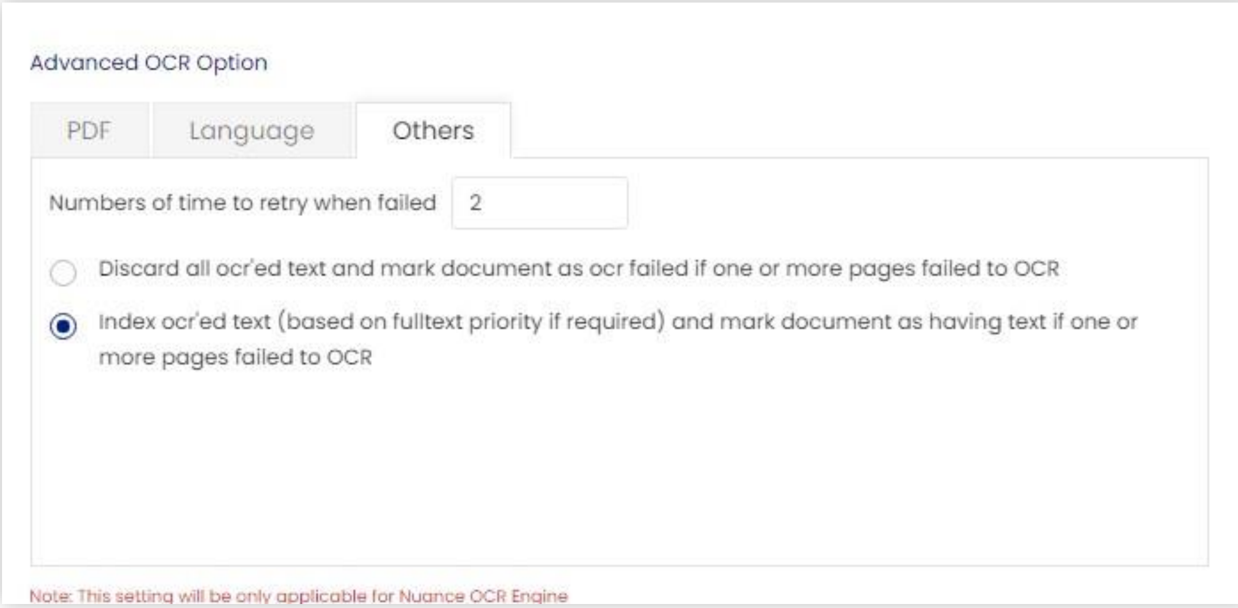


Note: Only PDF page matching set threshold will be OCR'ed and merged with extracted text and these settings are only applicable for Nuance OCR Engine.

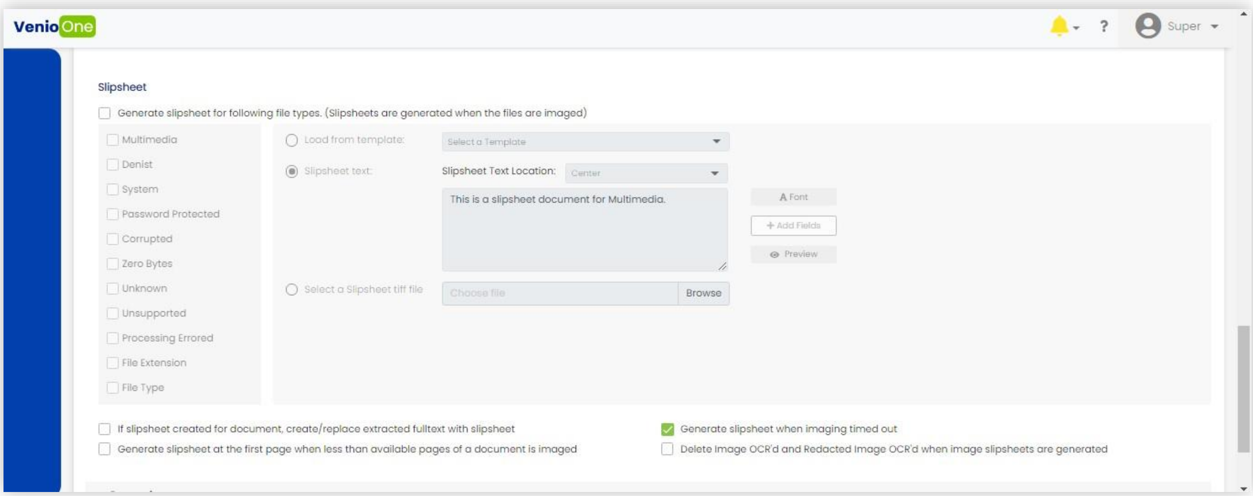
○ Language - To OCR documents for selected languages, select the required language checkbox(es).



○ Others - The number of times to retry when Nuance OCR engine fails is two. You can either discard all OCR'ed text and mark document as OCR Failed if one or more pages failed to OCR or Index OCR'ed text (based on fulltext priority if required) and mark document as having text if one or more pages failed to OCR as shown in the screenshot.



- Slipsheet - In the SlipSheet window, you can generate a slipsheet for specific file types. The slipsheets are generated when the files are TIFFed.

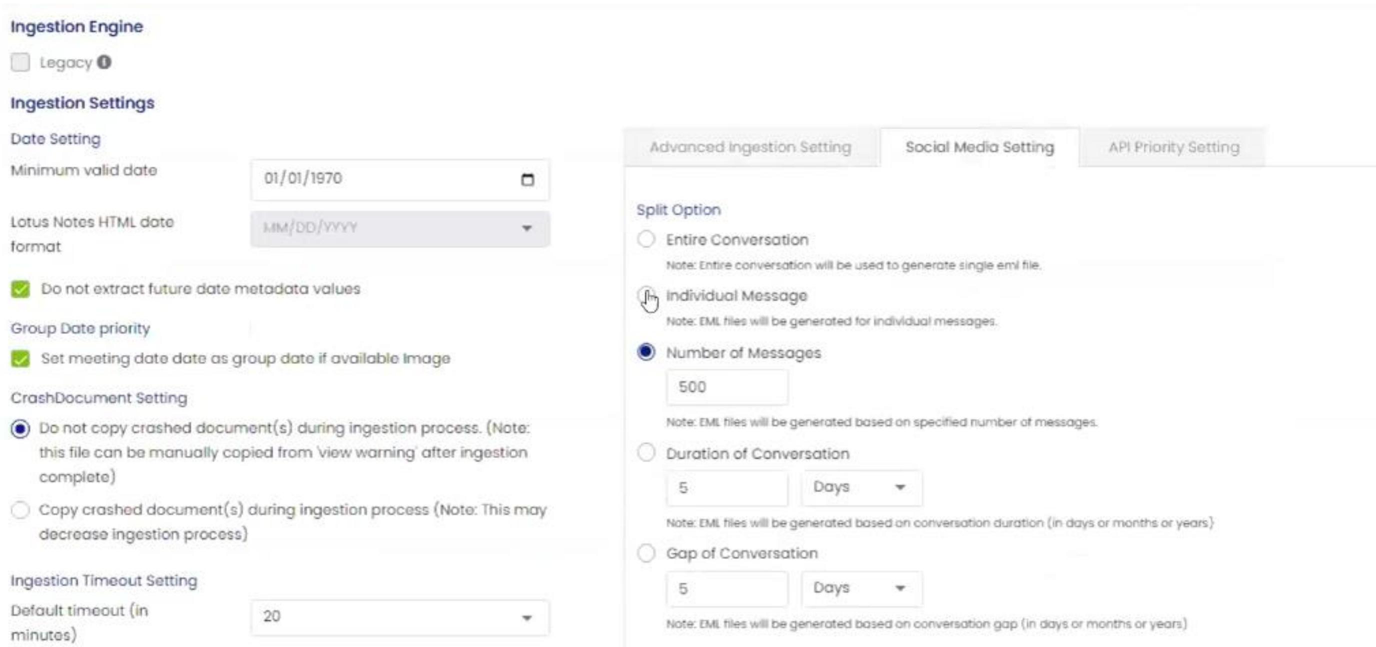


For more details on Slipsheet, go to the section [Creating Slipsheets from Console](#) and [Creating Slipsheets from Web](#).

Processing

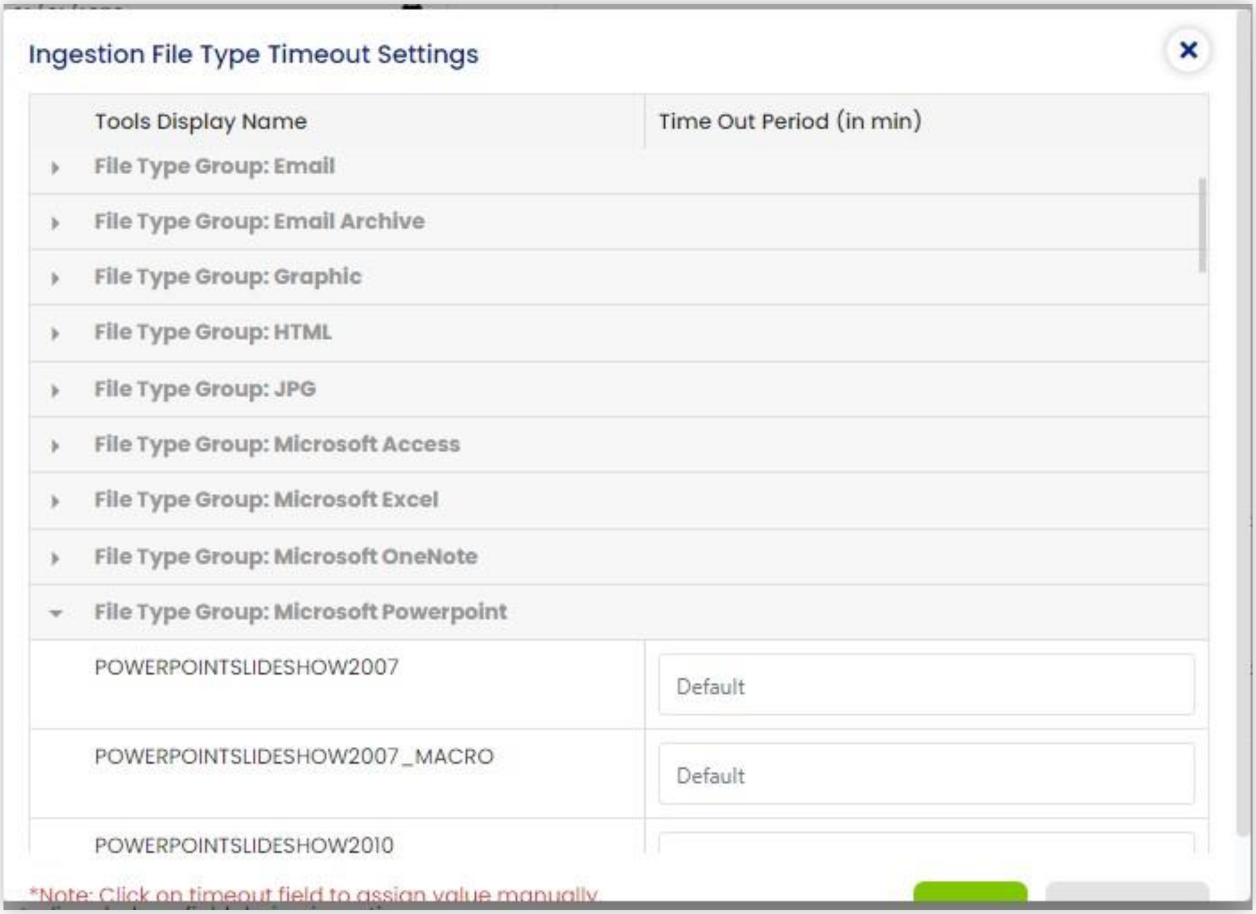
- Ingestion Settings
  ○ Date Time Setting - You can set the date time and the format in the Date Time Setting. In Group Date Priority, ye can set the meeting dates. Also, it's advisable not to include Crash Document during ingestion setting. The Default Timeout setting is 2- minutes. You can extract the internet message header by selecting the checkbox for Extract internet

message header. You can autocompute and populate custodian dedupe field, file path and relative path during ingestion from the Post Processing Setting. Enable the extraction of all views from NSF by selecting the checkbox for NSF viewing extraction setting. You can also adjust the social media setting.

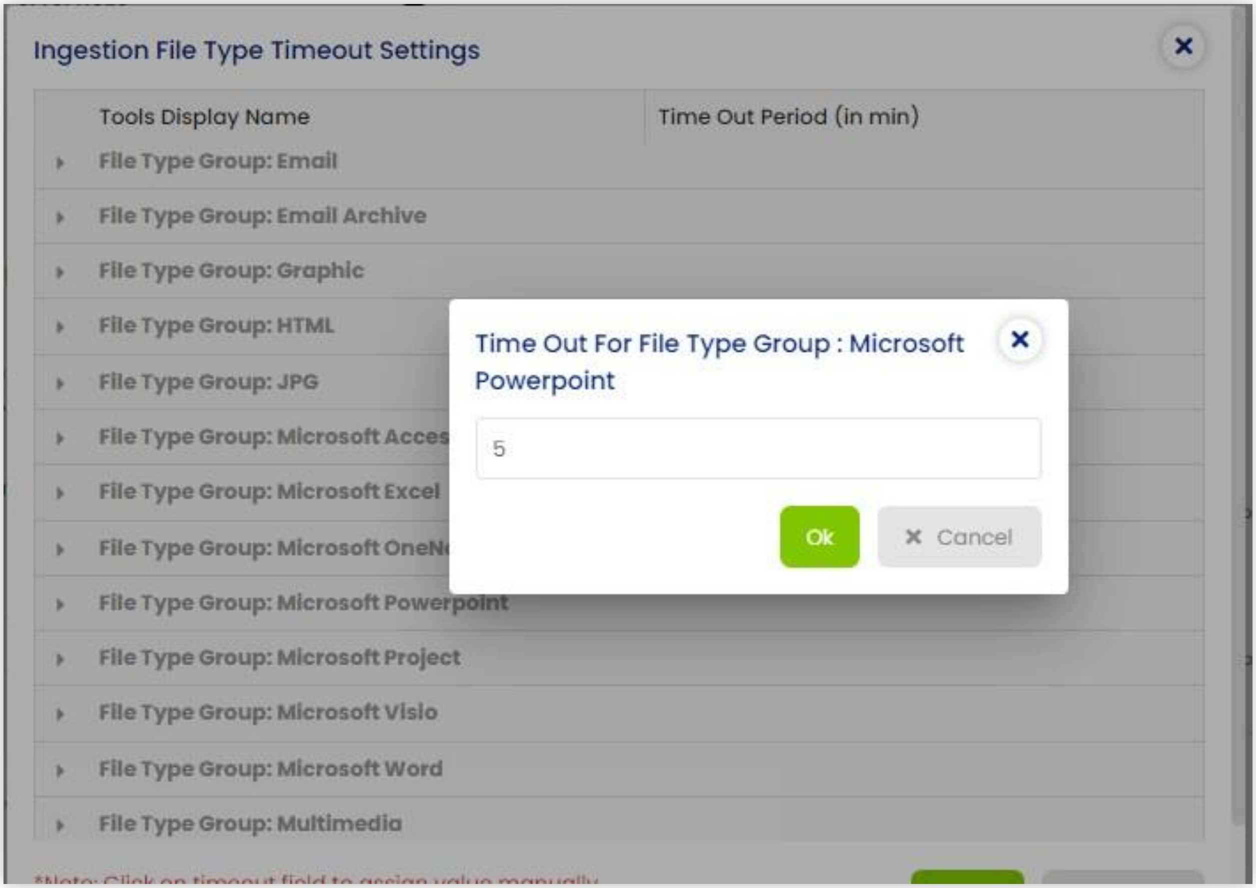


- Ingestion File type timeout– The ingestion timeout setting is for timeout required for processing the document.

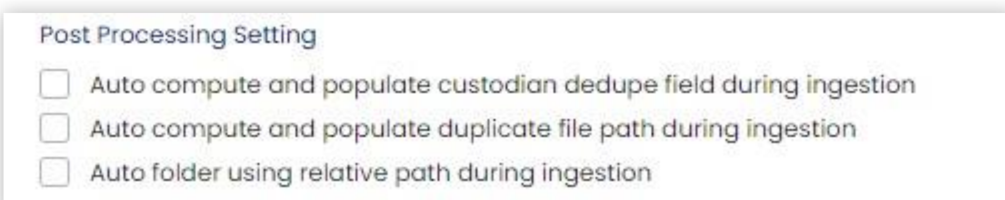
Users can click on the Ingestion File type timeout link which will list individual filetype groups.



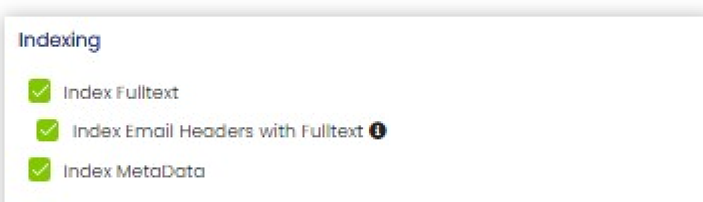
Right click on the individual filetype, user will have the option to set the timeout value.



- Post Processing - Select the post processing settings for a smoother ingestion



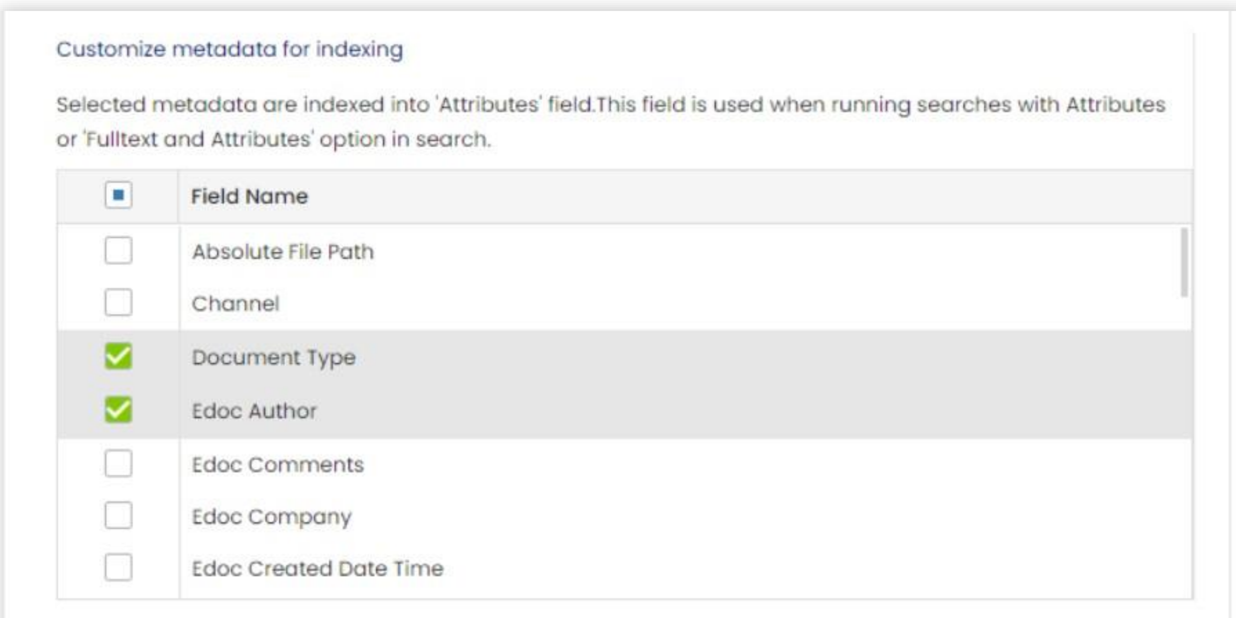
- Indexing – Select one of the radio buttons to enable indexing for ingested files. Enabling Index fulltext enables Index Email Headers with Fulltext too. You can also enable Index MetaData.



While hovering on the i button in Index Email Headers with Fulltext, the following options are displayed:

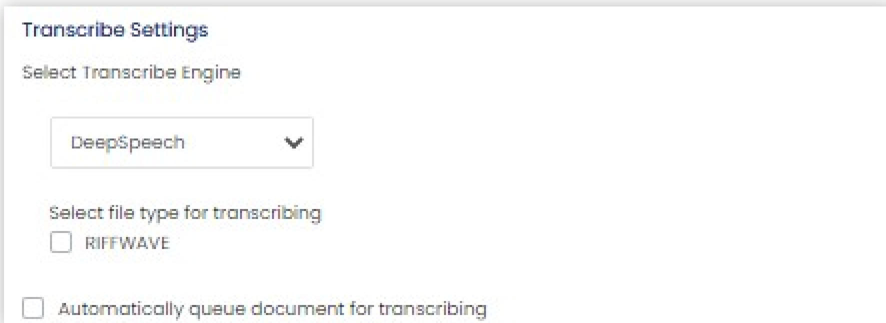
- EmailFrom ○ EmailTo ○ EmailCC ○ EmailBCC ○ EmailSubject ○ EmailAttachments

- Customize metadata for indexing - This field is used when running searches with attributes or 'full text and attributes' option in search. The selected metadata are indexed into the 'Attributes' field.

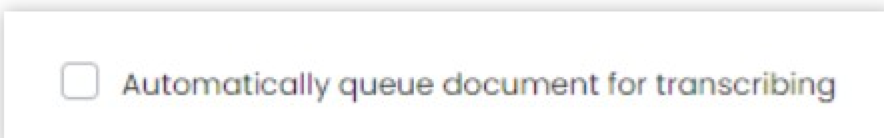


- Transcribe Settings – Transcribing uses a different transcribing engine to transcribe/record different file type. Deep Speech is the default engine. Amazon Transcribe and Azure Transcribe engine are services provided by Amazon & Azure. To transcribe audio files during ingestion, select the transcription engine (DeepSpeech,

Amazon, or Azure) and file type(s). If you wish to have files transcribed as they are ingested, use the check box to Automatically queue document for transcribing. Supported audio files will have text extracted and displayed in the Fulltext Viewer.
DeepSpeech supports: Riffwave files.
Amazon Transcribe supports: ISOBASEMEDIAFILE, MP3_ID32, QuickTime, MPEG4 and MP3 and Riffwave.
Azure Transcribe supports: MP3_ID32 and Riffwave.

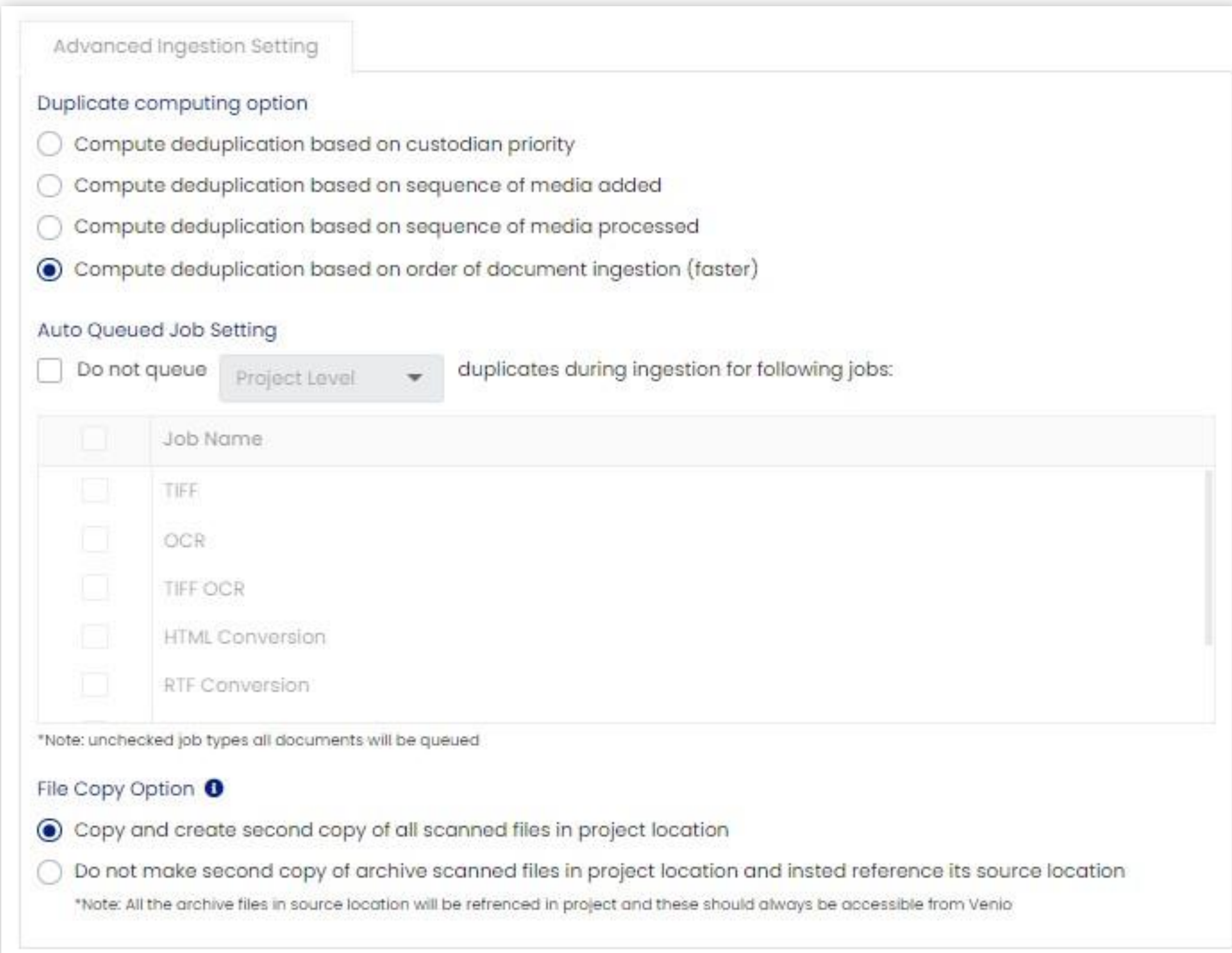


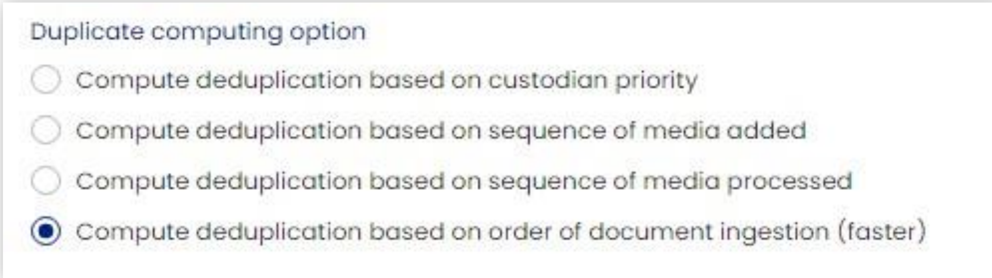
The Deep Search uses Riffwave File type.
Amazon Transcribe uses RIFFWAVE, ISOBASEMEDIAFILE, MP3_ID32, MPEG4 and MP3, QUICKTIME File Formats.
Azure Transcribe engine uses RIFFWAVE and MP3_ID32 file formats.
We can automatically queue documents for transcribing by selecting the checkbox below.



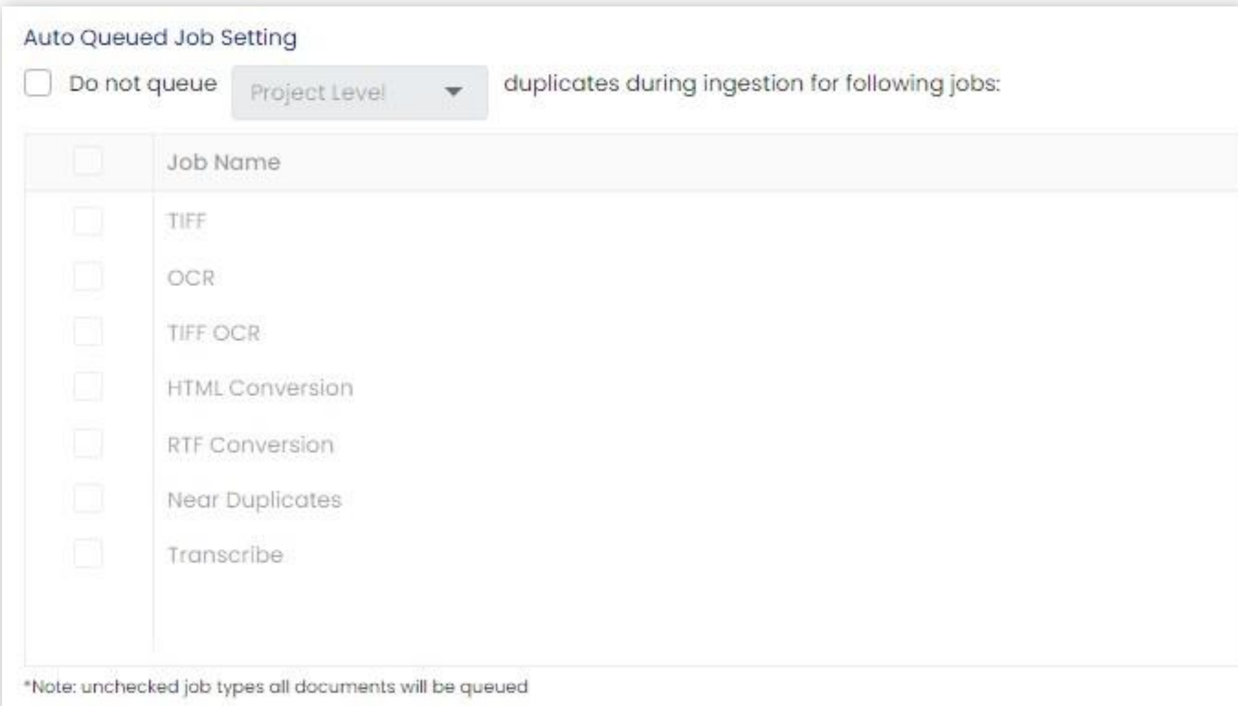
- Advance Ingestion Setting – You can configure settings for Duplicate Computing Options, Auto Queued Job Setting and Filter Copy Option

- Duplicate Computing Options: You can select this based on the custodian priority, or sequence of media added, or media processed or the order of document ingestion.

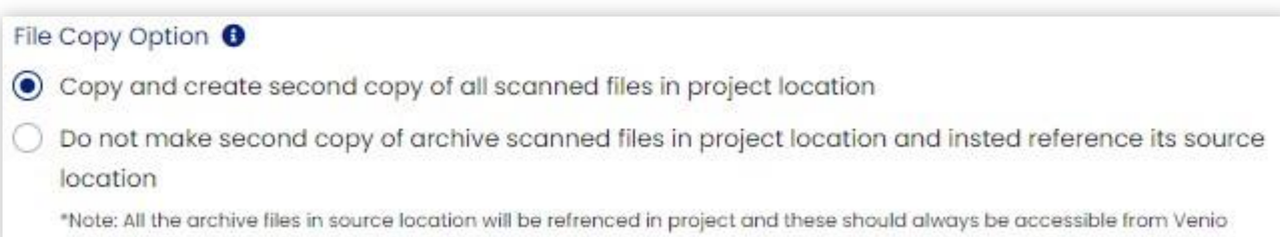




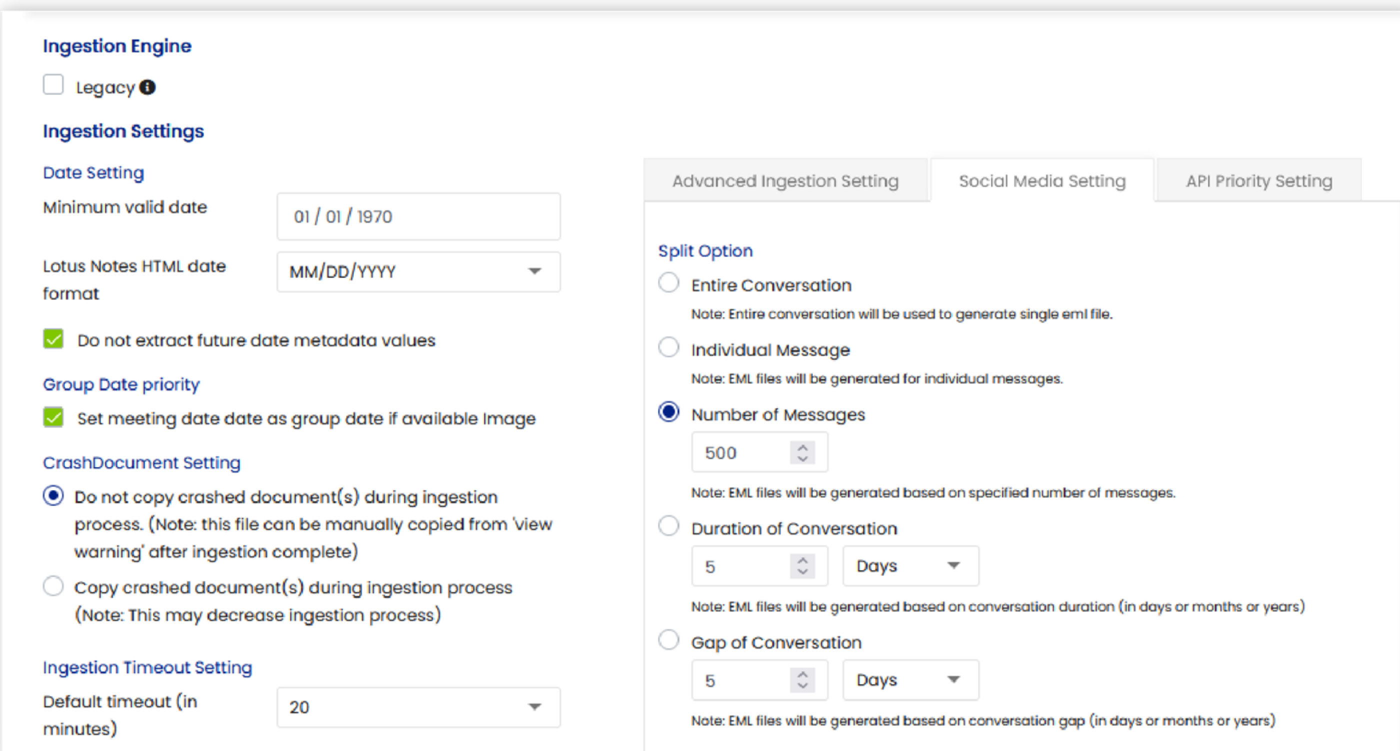
- Auto Queued Job Setting - This can be done at project level or custodian level. Can select the list of job names which we don't want to queue.



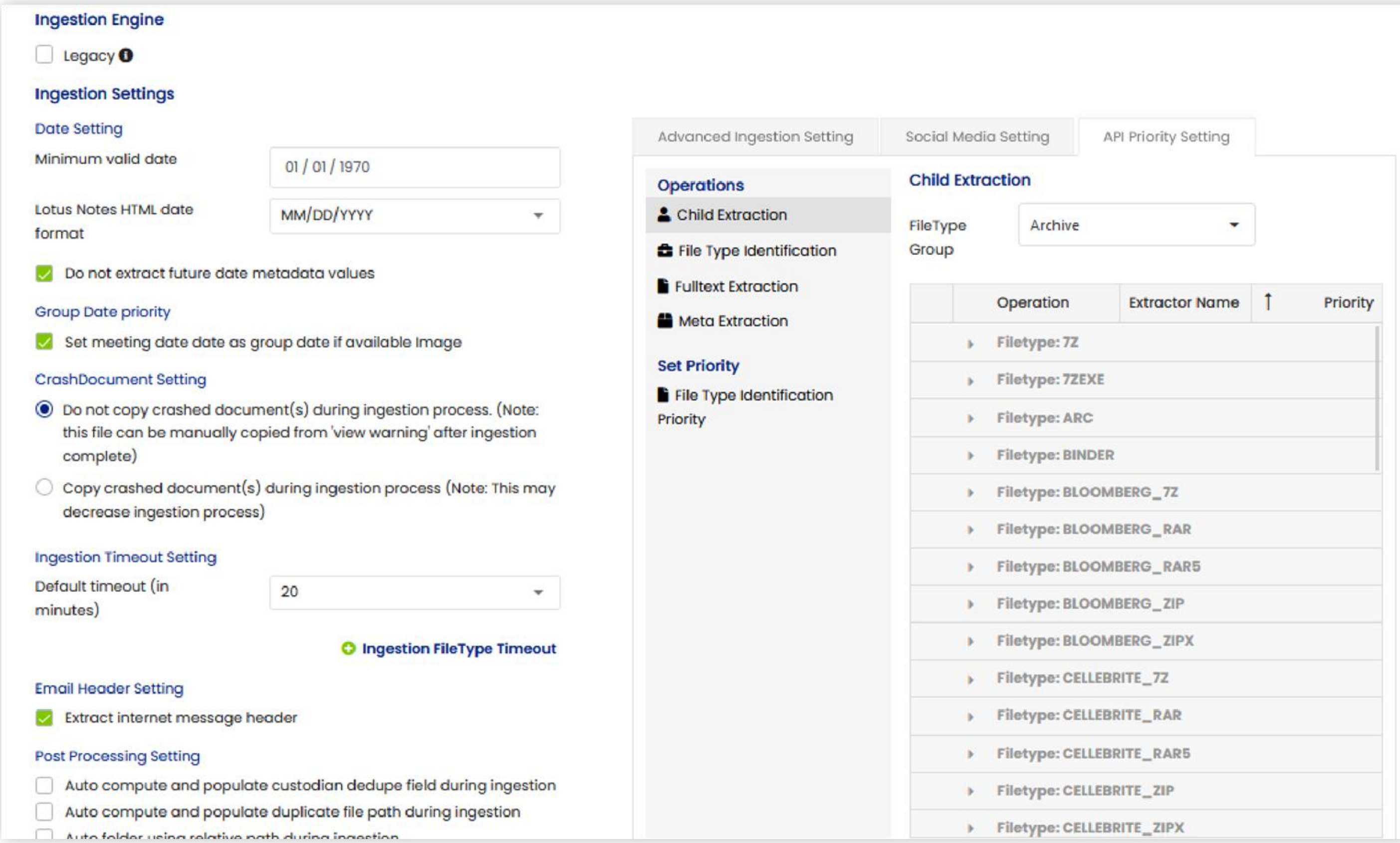
- File Copy Option - You can create the second copy of all scanned files in project location.



- Social Media Setting – This tab is visible when the ingestion engine Legacy check box is unchecked while creating a case. Users can select the options as per the requirement.



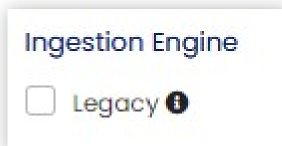
Venio



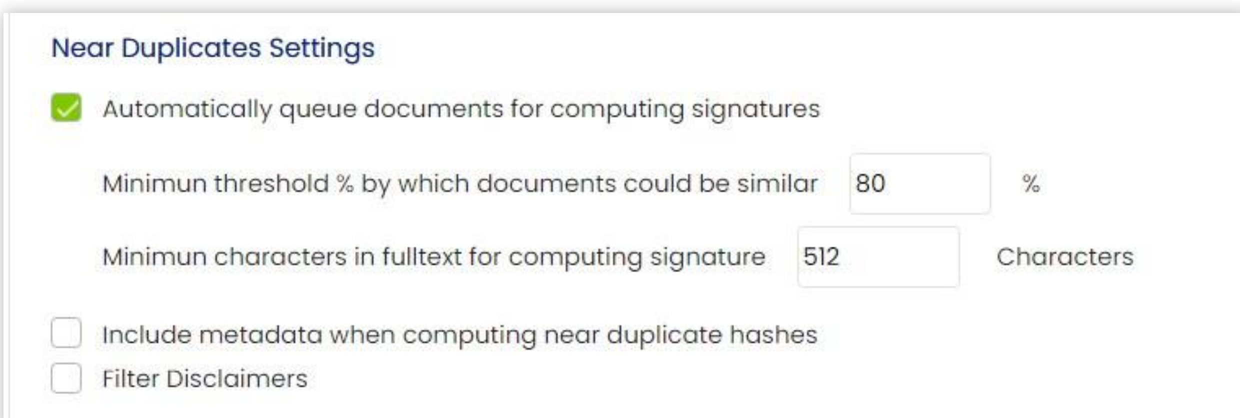
- API Priority Setting - This tab is visible when the ingestion engine Legacy check box is unchecked while creating a case. Users can select the options as per the requirement. The API Priority Setting link opens the Filetype Processing Engine Settings dialog, which then opens the File Type Identification Priority dialog.

Language Identification, Email Analysis and Email Threading – Select language identification checkbox for enabling language identification of the document ingested. You can also choose the option for computing the language for spreadsheet. Select Enable Email Analytic to compute the email analysis of the emails ingested. Select compute Email identification during ingestion option to identify the emails. You can also compute the inclusive email and generate the missing emails during ingestion.

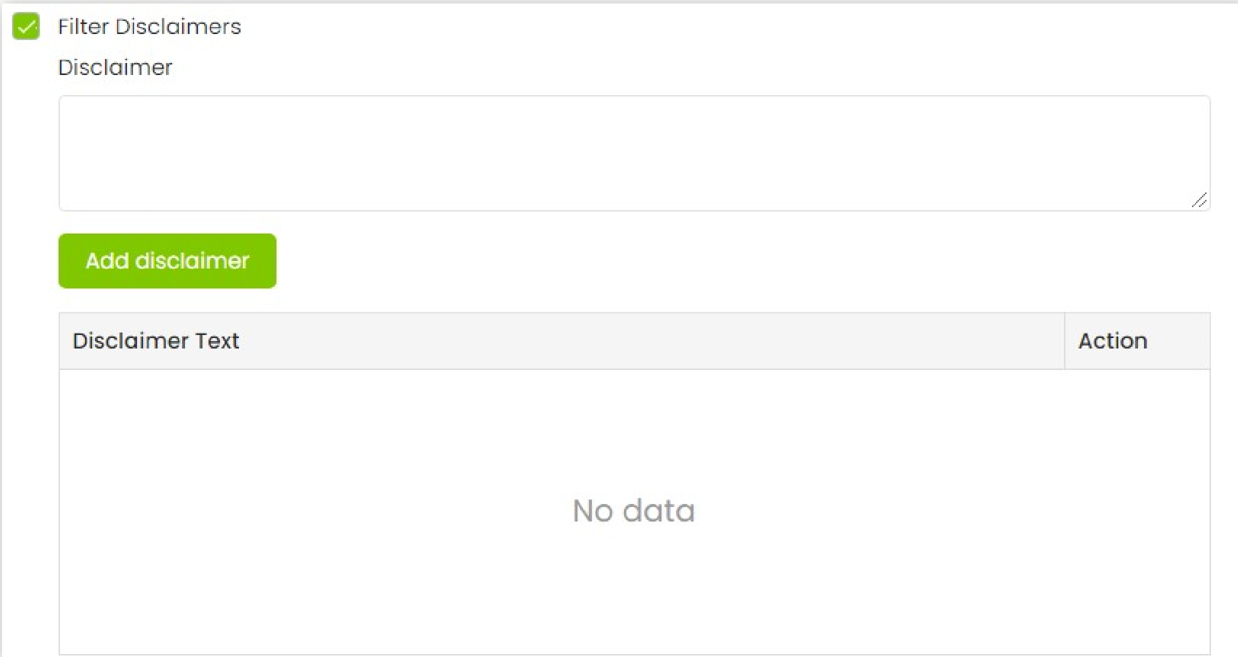
- Ingestion Engine - The project must have a Fallback Ingestion engine for social media viewing, but this depends on the DB value of Ingestion engine. For this, the user can select the option to create the project using Legacy or Fallback. Depending on the Legacy option is selected or not during project creation, the project with Legacy Engine or Fallback is created.



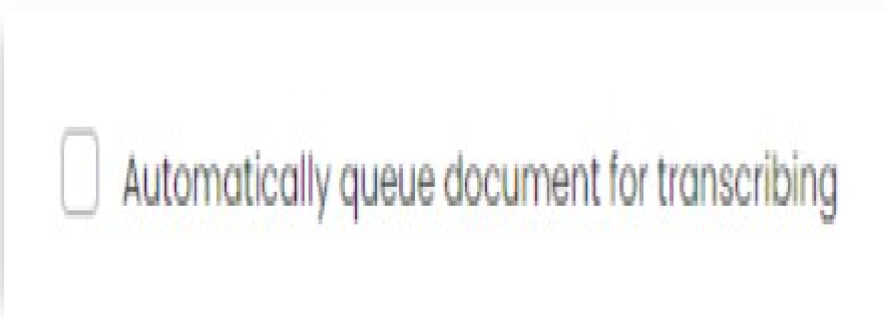
- Near Duplicates Settings – These settings help you to automatically queue documents for computing signatures by selecting the checkbox, mention the minimum threshold % by which the documents could be similar and specify the minimum characters in fulltext for computing signatures. You can also select if you would like to include metadata when computing near duplicate hashes or not through a checkbox.



We can either include or exclude disclaimer using the Filter Disclaimers check box. If you have added the disclaimer, it will be visible in the disclaimer text panel as shown below:

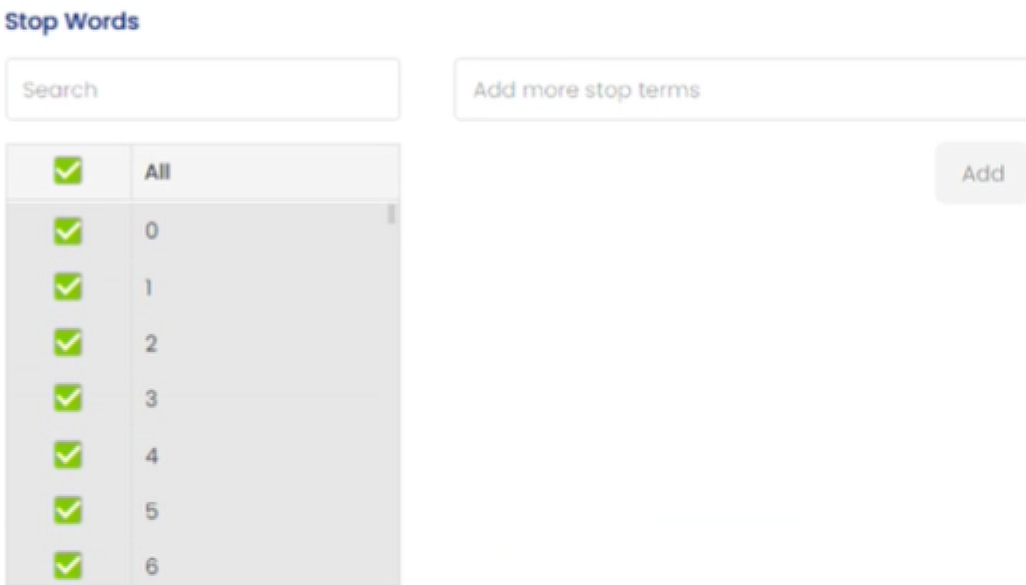


- Transcribe Settings – To transcribe audio files during ingestion, select the transcription engine (DeepSpeech, Amazon, or Azure) and file type(s). If you wish to have files transcribed as they are ingested, use the check box to Automatically queue document for transcribing. Supported audio files will have text extracted and displayed in the Fulltext Viewer.
  DeepSpeech supports: Riffwave files.
  Amazon Transcribe supports: ISOBASEMEDIAFILE, MP3_ID32, QuickTime, and Riffwave.
  Azure Transcribe supports MP3_ID32 and Riffwave.



Note: Deepspeech is only supported for windows server 2012 and below.

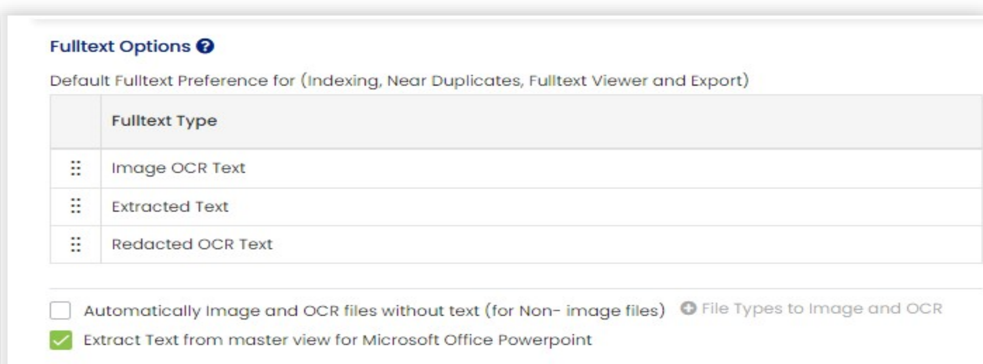
- Stop Words



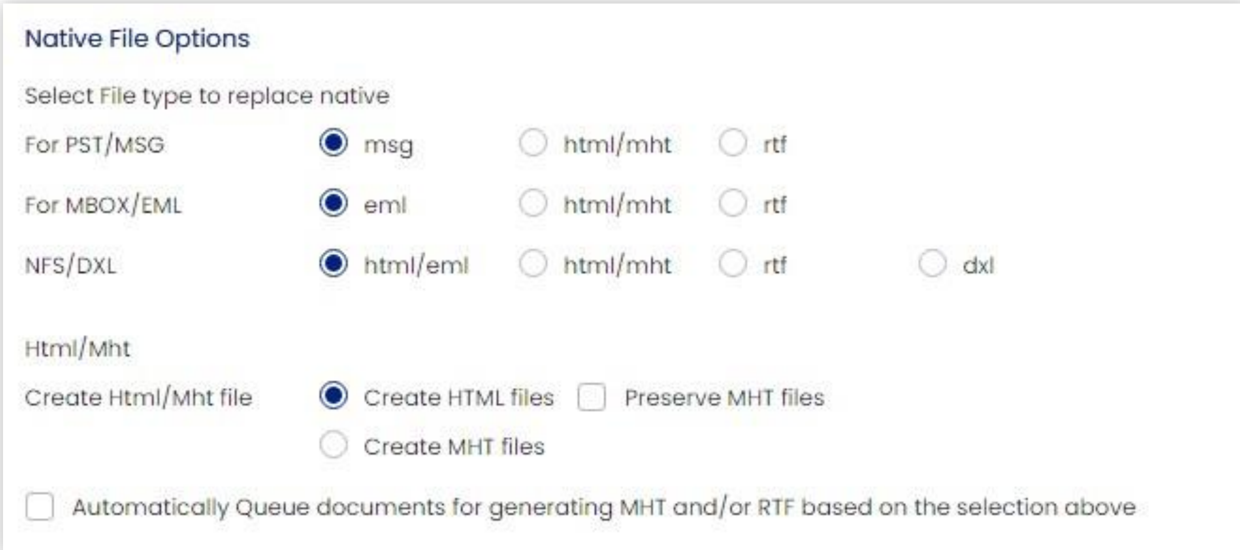
You can add stop words by adding the words and clicking on Add button. You can also search all the added stop words.

General

- FullText Options - The Default Full Text Preference for (Indexing, Near Duplicates, Fulltext Viewer and Export) is Image OCR Text, Extracted Text, and Redacted OCR Text. You can drag and drop the following Full Text options: ○ Automatically Image and OCR files without text. (Applicable for Non- image files only) ○ Extract Text from master view for Microsoft Office PowerPoint.



- Native File Options - Select the options for to convert the native file to different formats html/mht, rtf etc. There are options to automatically queue the documents for generating HTML/MHT or RTF based on the selection.



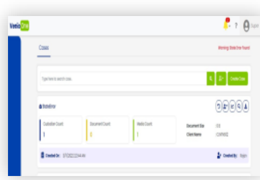
If Extract Native is selected, the native files will be present in the Native folder in the Project Location and all workflows will be normal.

If TOA is selected, then after post-processing, the files will be deleted from the Native folder. However, the full text files will still load in the Document Viewer and may be exported and searched successfully. Also, the Image Conversion Options (described below) will not be visible. See Section Error! Reference source not found. above for more information on creating TOA cases.

For information on how to Install Task Synchronizer, refer to the Page no 12, Section no. 3.1 from the Installation/Upgrade Guide

For TOA Projects

Select TOA from the Native file options:



- Discovery Exception Handling - Specify how to handle the processing for failed files. If you selected to repair the file, when any file fails to process, an email notification will be sent to repair the file by replacing the file or providing a valid password.

- HTML Conversion Settings - HTML Conversion setting is divided into Hidden objects and spreadsheet. By default, Show hidden rows/column/sheet and Show hidden text and Show spreadsheet grid lines should be checked.

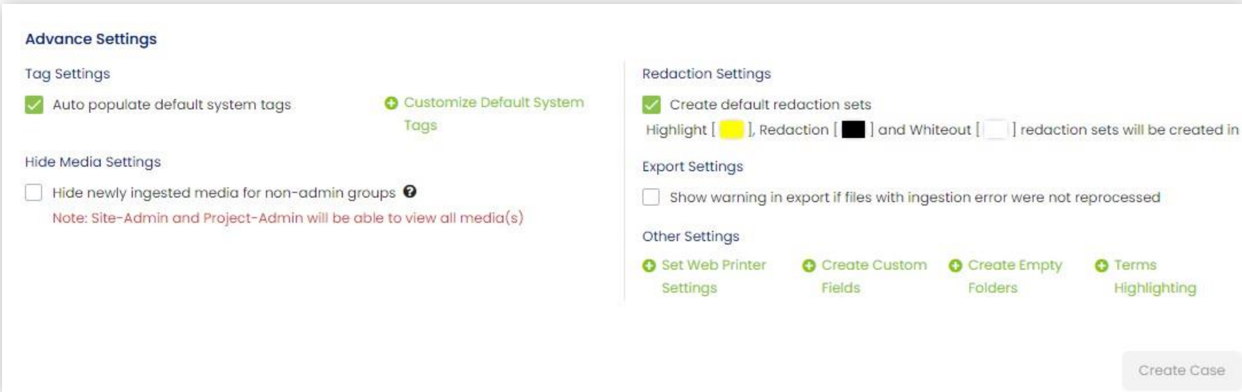
- Search Terms – Enter search term(s) on a separate line. Documents will be auto tagged with the search terms, and the terms will be listed in the tag list.

- Password – Enter passwords to decrypt any password protected files being uploaded

- Entity Extraction Option - Select this option if you want to auto- queued the files for the entity extraction process.

Advance Settings

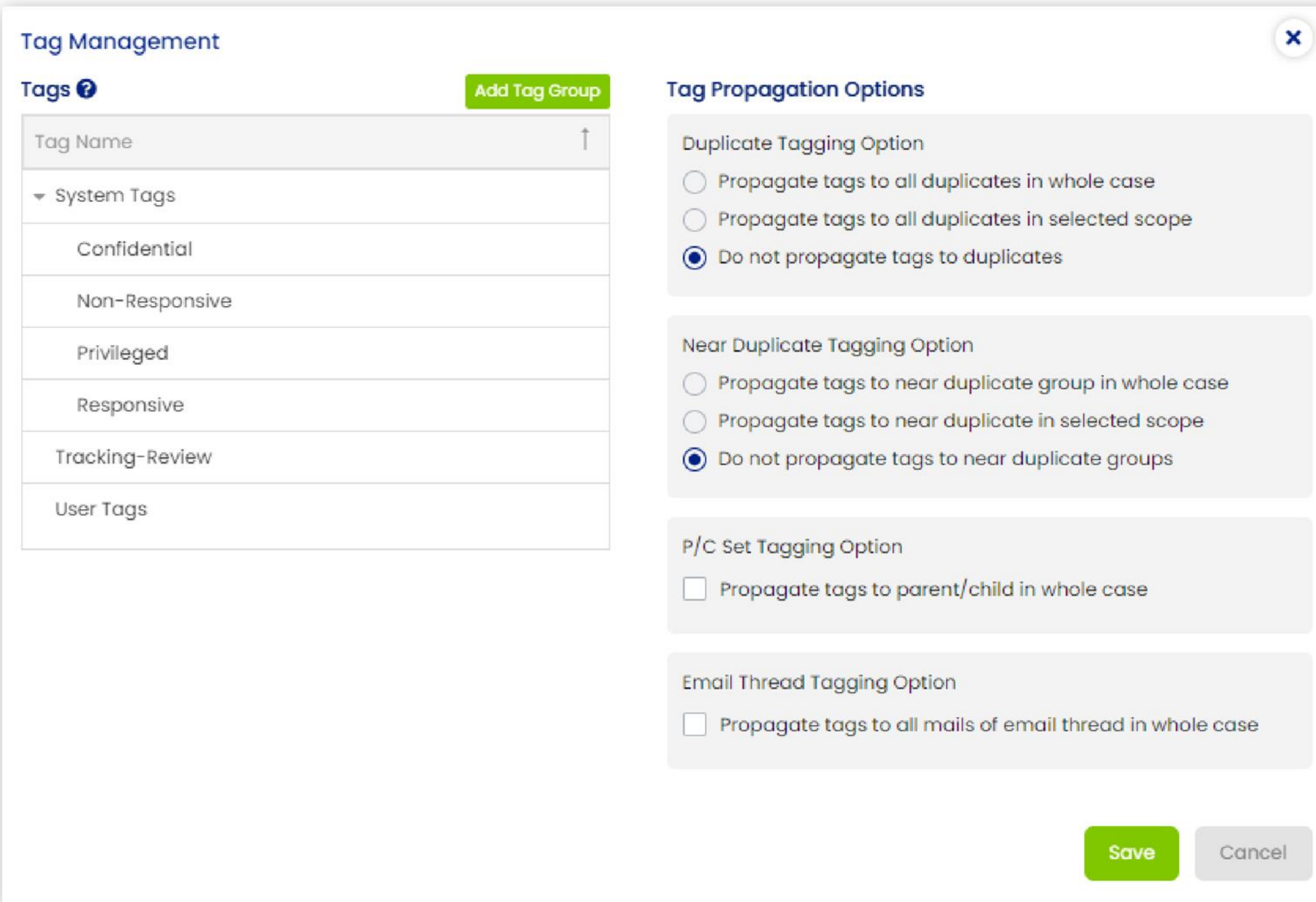
Some of the very essential settings such as default System Tag settings, Media Settings, Redaction Setting, Export Settings and other Settings (Web printer settings, Create custom fields, Create folder, Term Highlighting etc.) can be configured through Advanced Settings while creating a case.



- Tag Settings – You can generate the default system tags by selecting Auto populate default system tags checkbox.

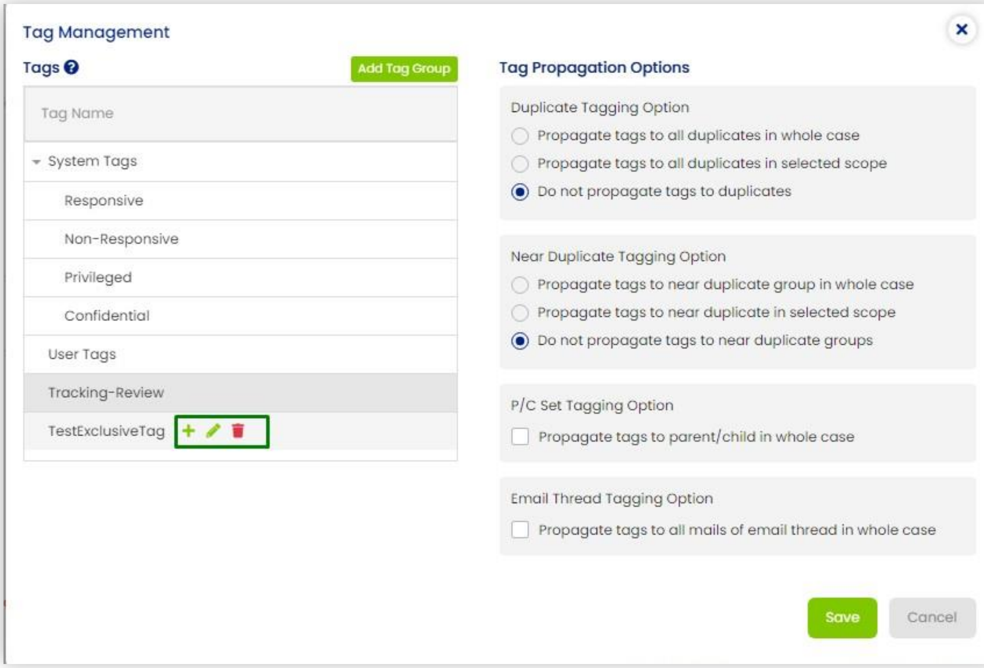
- Customize Default System Tags - Click on Customize Default System Tags option to apply exclusive rule. Enter the Tag Name and click (

) button to add a tag group. You can add both exclusive/inclusive tag rules as shown as below. You may check the Apply Exclusive Rule checkbox to make the tag mutually exclusive. Click Add. The newly created



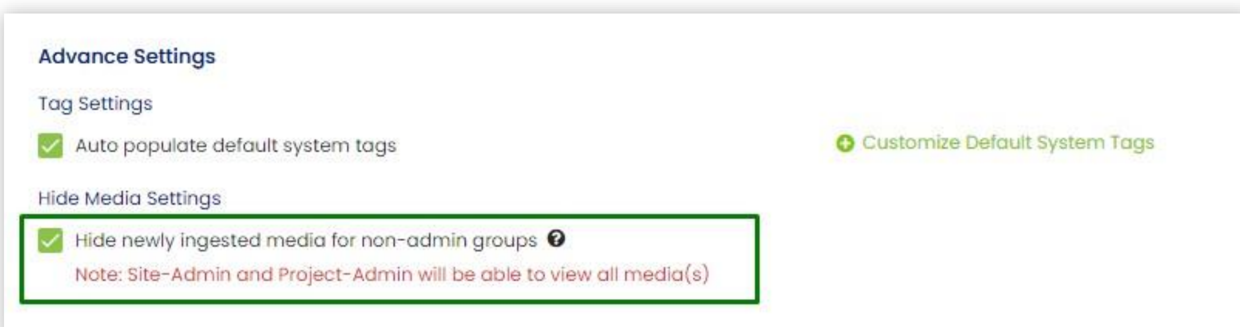
tag group appears in the Tags list.

To Add tag under the group, Edit Delete the tag group, you can mouse hover the tag name.



You may also apply the tag propagation rule as required. Similarly, you may also choose to apply the Tag Propagation Options using the radio buttons and checkboxes. Click the Save button to save your settings.

- Hide Media Settings – By checking this option, the newly ingested media gets hidden for all the non-admin groups. Access to this media can be provided to non-admin groups from Venio Web. All the media listing modules show only those media which are restricted to a particular set of users. Restricted media-related information is displayed in Project Details, figures, and charts.



These VenioOne Modules list only Restricted Media:

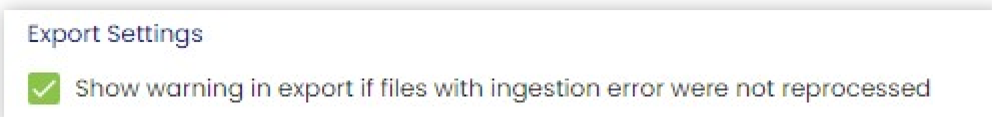
- Export
- Dashboard
- Move Media /Documents
- Tiff QC Wizard

- Spam Tag
- Manual Indexing
- View Duplicate->Project Scope
- View Similar Documents

When Document Restriction mode is on, all sources such as Tags, Folders, Saved Searches are controlled (or disabled), i.e., these sources are under the restricted media scope and counts shown are in accordance with the restricted scope. For example, export by tag source does not export documents outside the restricted scope even if those meet the tag source criteria.

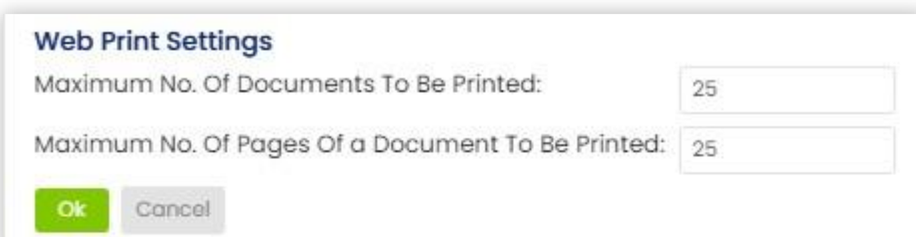
- Redaction Settings - Select Create default redaction sets option to create default redaction sets in the project. This includes Highlight, Black, and Whiteout Redaction.

- Export Settings - Set to show warning while performing export if there are files with ingestion error which were not reprocessed.



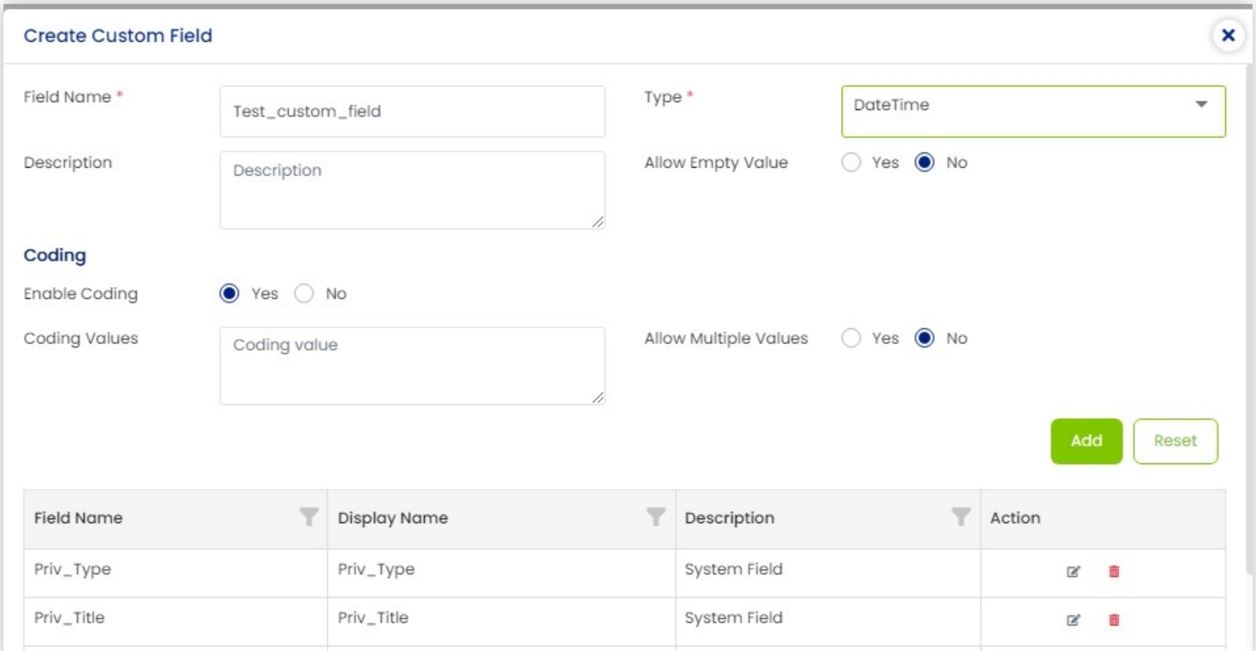
Other Settings

- Web Printer Settings – Using these settings, you can set the maximum number of documents that can be printed and the maximum number of pages per document that can be printed. Enter the number and click Ok to save the printer setting.

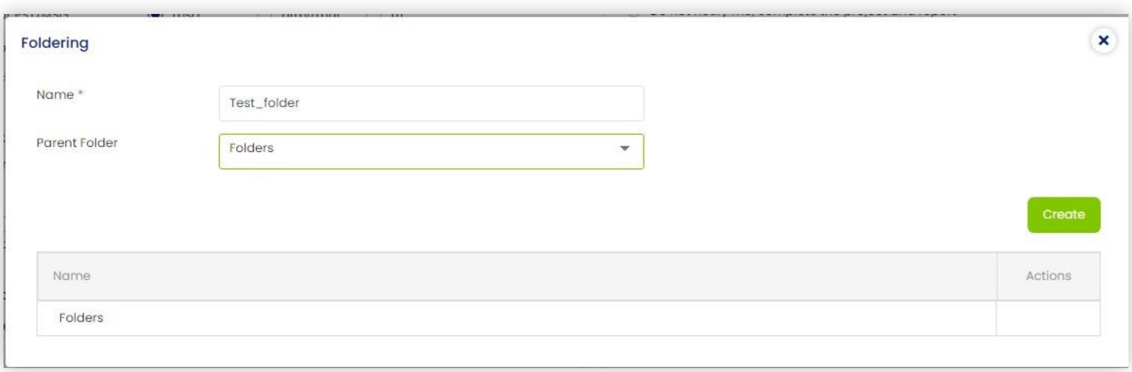


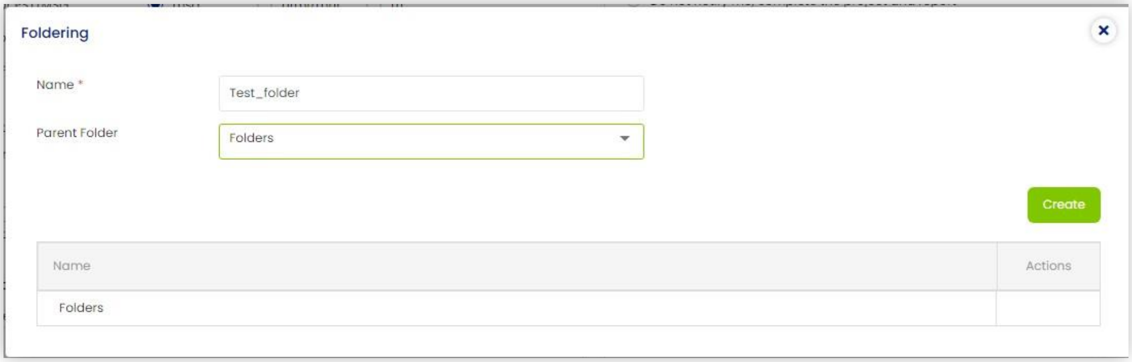
- Create Custom Field: You can choose to create a Custom Field by clicking on “Create Custom Field”. The create custom field window then appears where you can create fields. The created field should be applicable for create/edit cases as well as create/edit case templates.

If a case is created using the template all the fields should also be created correctly in the newly created case.

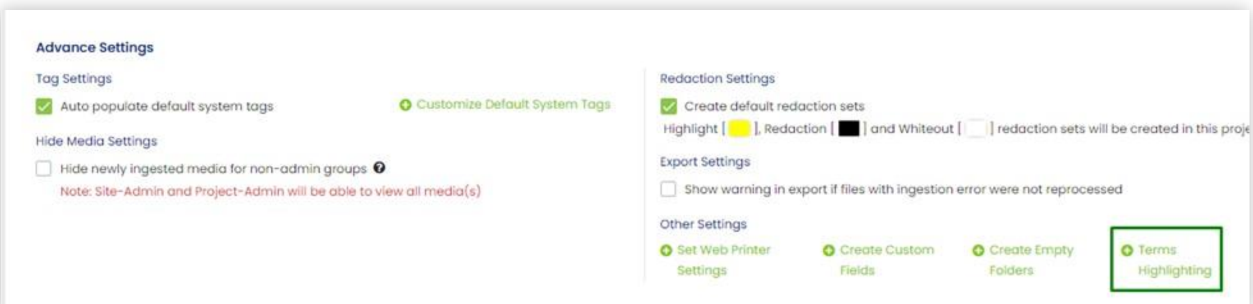


- Create Empty Folders - You can choose to create an empty folder by clicking on the Create Empty Folder option. The create folder dialogue appears where you can create a folder in a different folder hierarchy or delete the created folders.



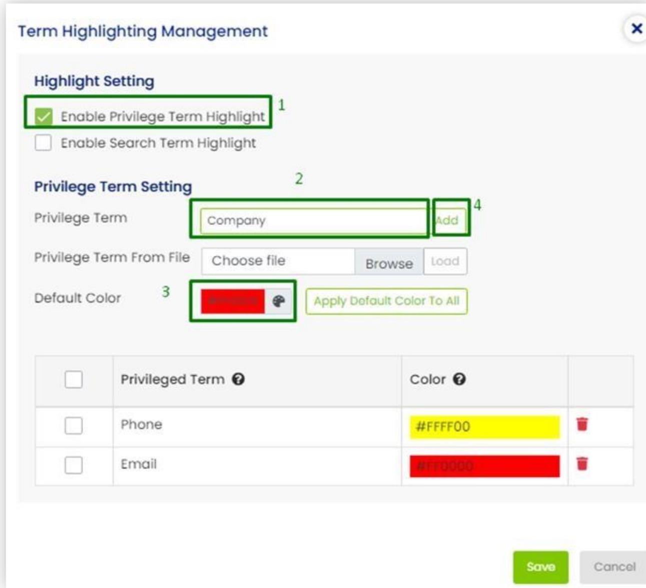


- Term Highlight Management - While creating a case, you can establish highlights for specific privilege terms that will make it easier to see the terms while you are reviewing your documents. You may use different colors for each individual term. Expand Advance Settings and click on ( )to navigate to Term Highlighting dialogue.

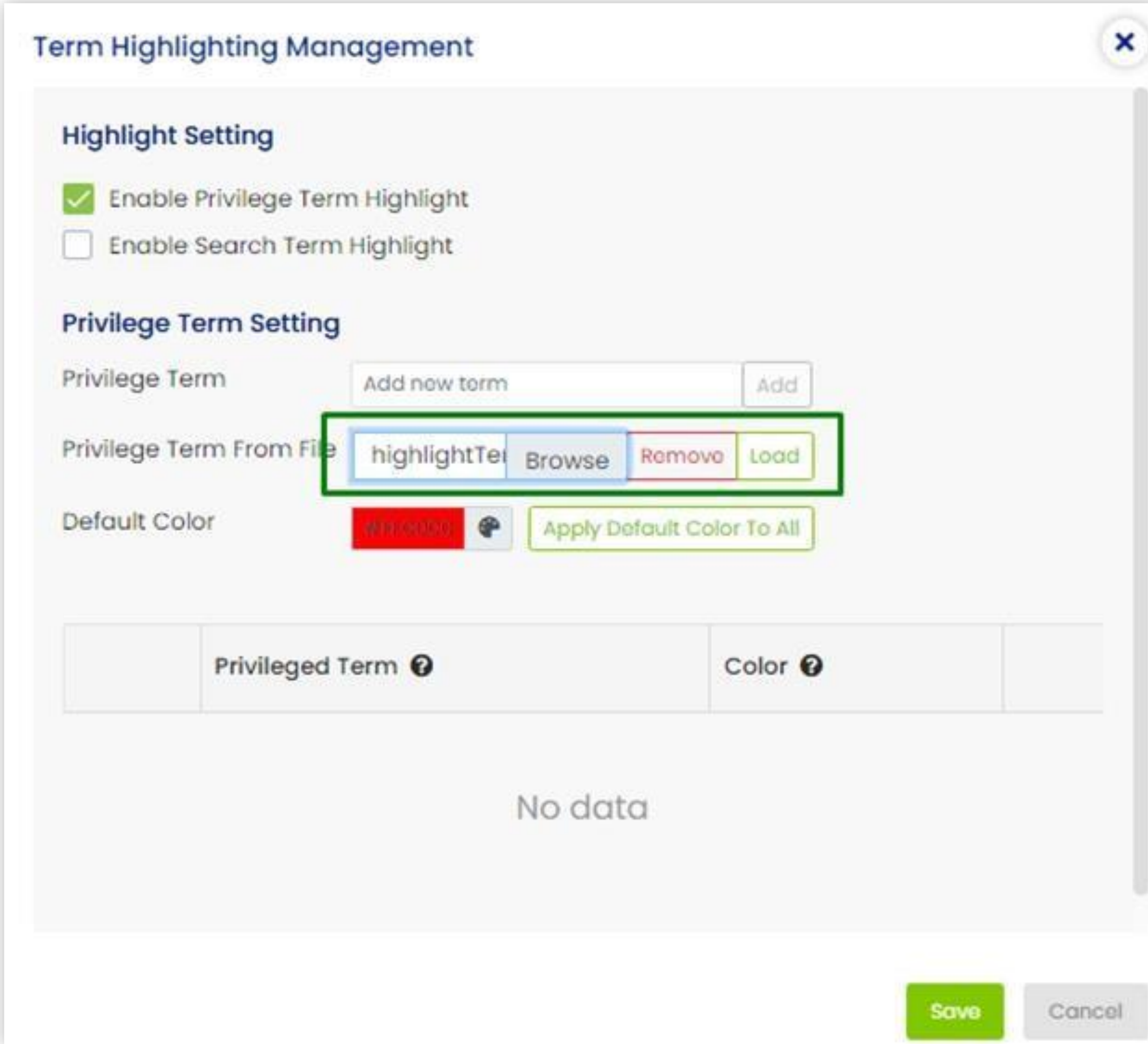


Enable Privilege Term Highlight

1. Click on Enable Privilege Term Highlight checkbox to enable the settings for privilege term highlighting.



1. Enter Privilege Term individually, select the term color and add term. Similarly, you may also load a text file with all the terms.
2. Click on Browse, select load file and click Load to load the privilege term.

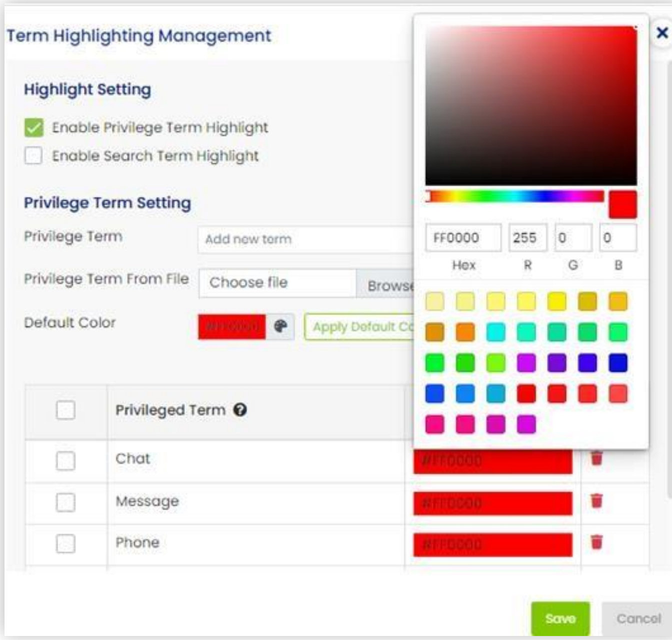


Note: Create a text file with each term on a separate line and use the load function to upload the term list. Then select the colour and click Load.

3. Select the color for each term and click Add.

Or

4. By default, the highlight color is yellow. Use the drop-down list to choose the color you want.
5. You can also apply the same Default Color to all the privilege terms by clicking Apply Default Color to All. Once the terms are loaded, they will appear in the list.

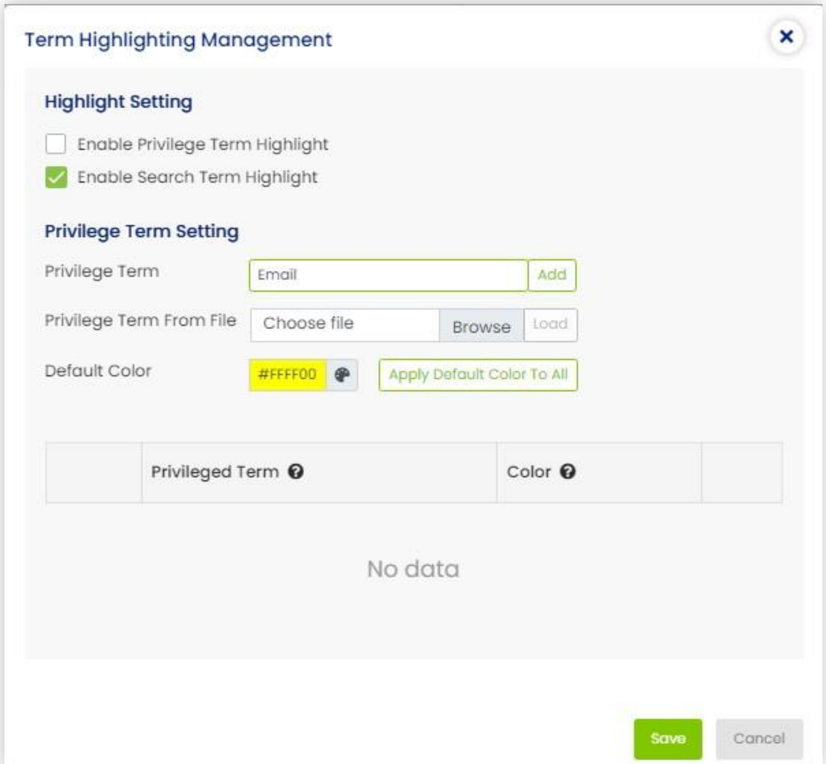


6. You can make changes to each term color by clicking in the Color column.
7. Click Save when you have all your terms and colors established. You can also use the Delete button to Delete Privilege Term tab to make changes to the terms.

Note: Privilege term can be configured from the Admin Section for the case as well. You may navigate to: **Administration >> Case Admin >> Highlight >> Manage** select project and edit the privilege term to be highlighted as necessary.

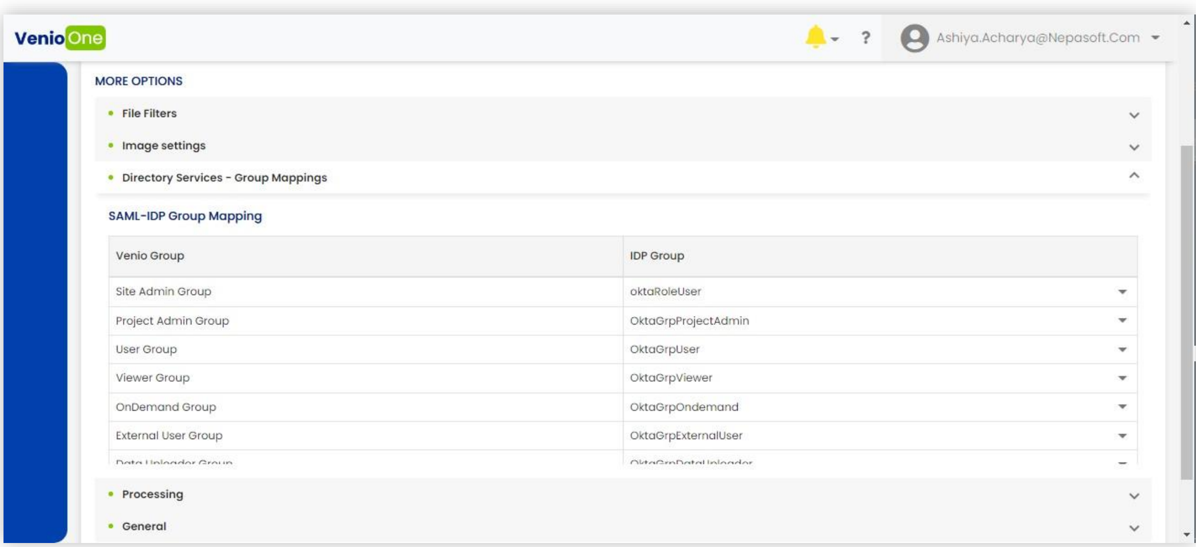
8. Once the case is created enabling the term highlight and data is processed, In search and review page review can use highlight tool to see the privilege term.

- Enable Search Term Highlight - Enabling Search Term highlight will highlight the term search in the Search and Review page. This setting is the default and can be disabled as required.

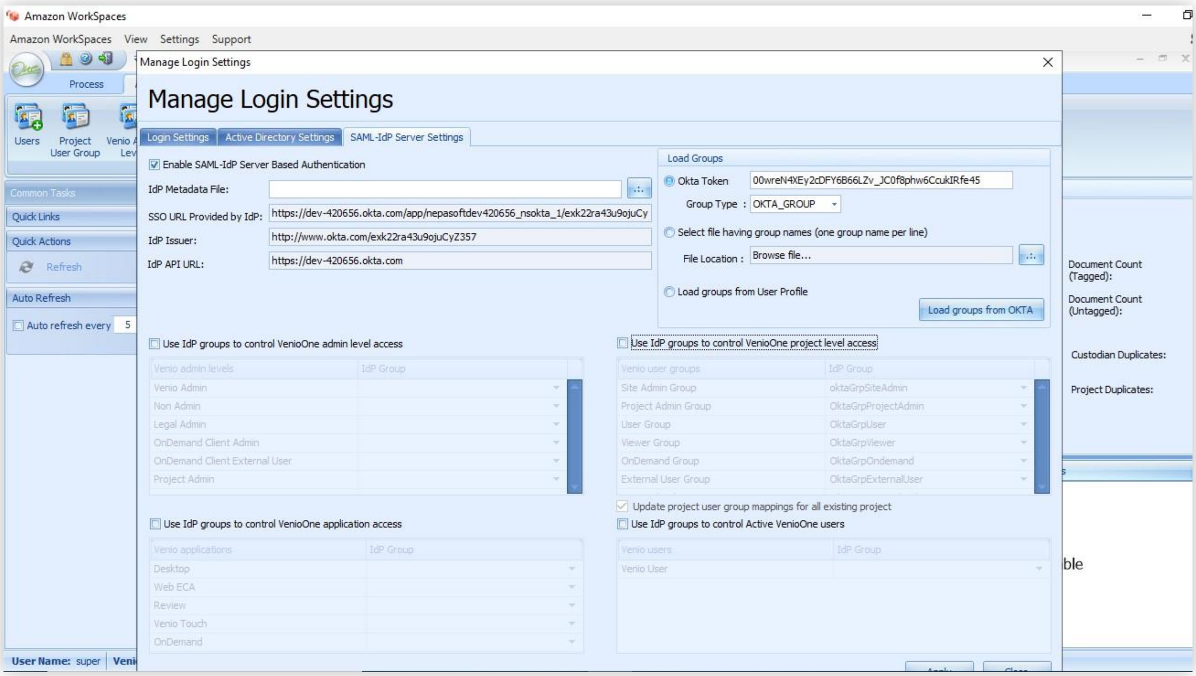


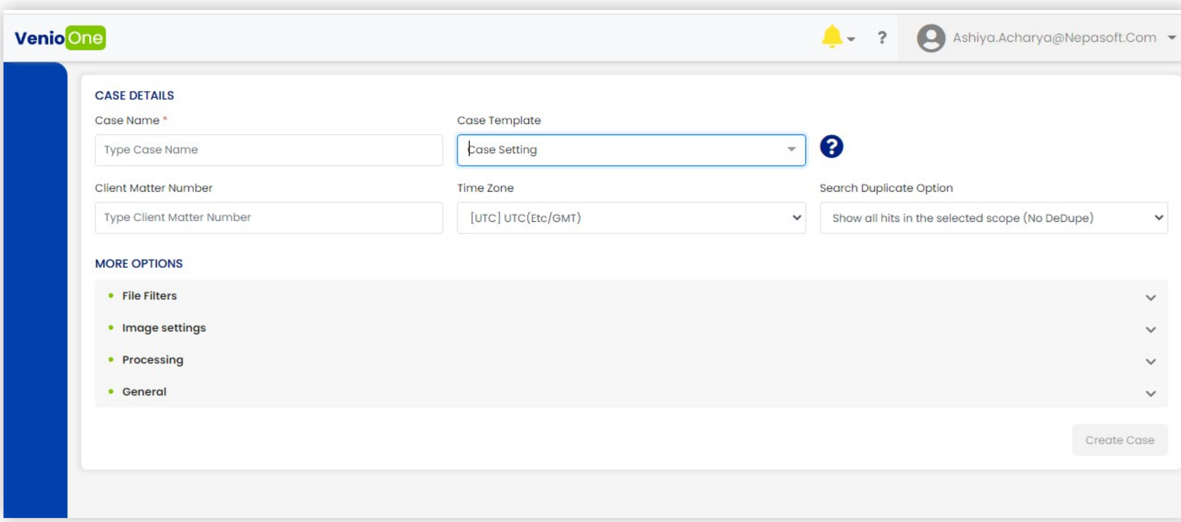
Enabling this setting highlights the term searched in search and review page.

- IDP Group Mappings:
  1. Enable SAML-IDP Server Based Authentication and Use IDP groups to control VenioOne project level access in SAML-IDP Server Settings from Console
  2. Directory Services - Group Mappings should be available below image settings in "Case creation" page and group mappings should be same as in Console

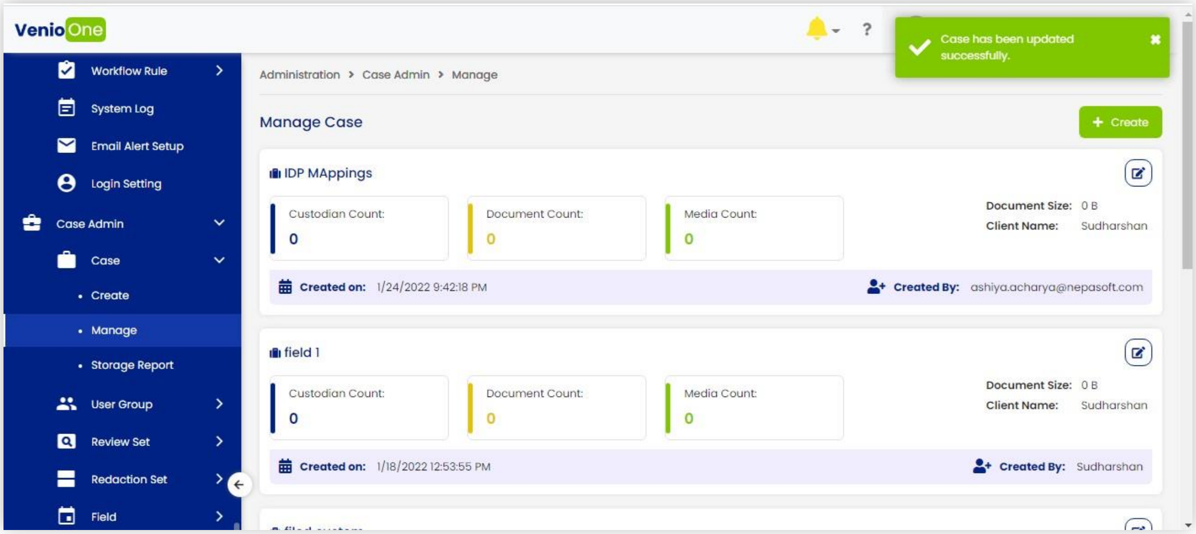


3. Disable "Use IDP groups to control VenioOne project level access from Console
4. "Directory Services - Group Mappings" should not be available in "Case creation" page

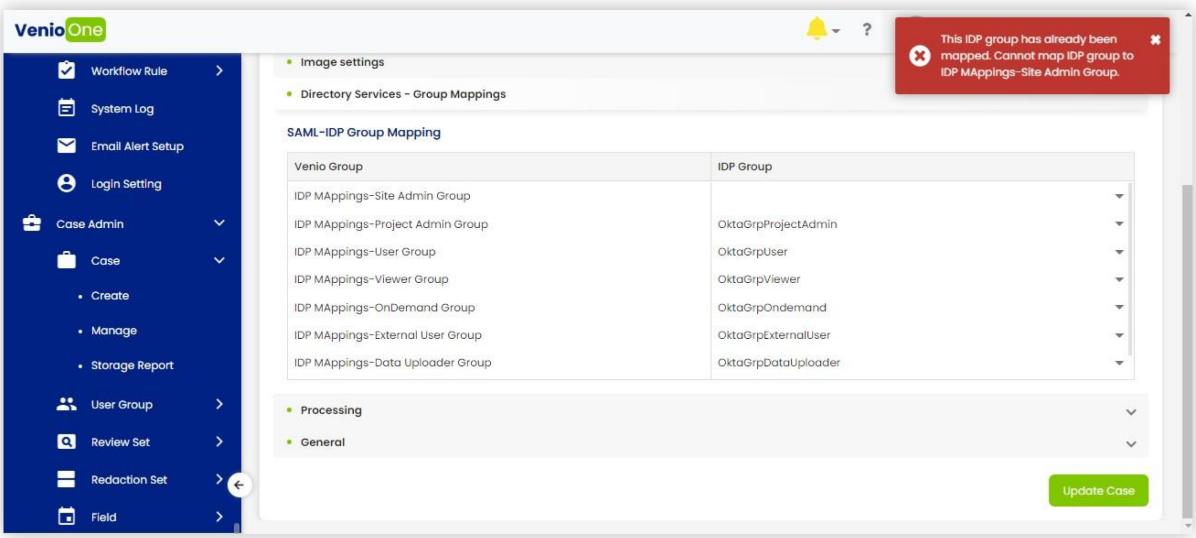




5. Goto Admin Settings and in Case Admin Section, click on Manage under Case dropdown and click Edit.
6. Click on "Directory Services-Group Mapping" Edit the Group Mapping and click on "Update Case"
7. Edited AD Group mapping should be updated and saved successfully



8. Select the same IDP Group for two Venio Group's. And click Update Case.
9. "This IDP Group has been already mapped. Cannot map IDP group to IDP Mappings-(Venio Group name) should be displayed

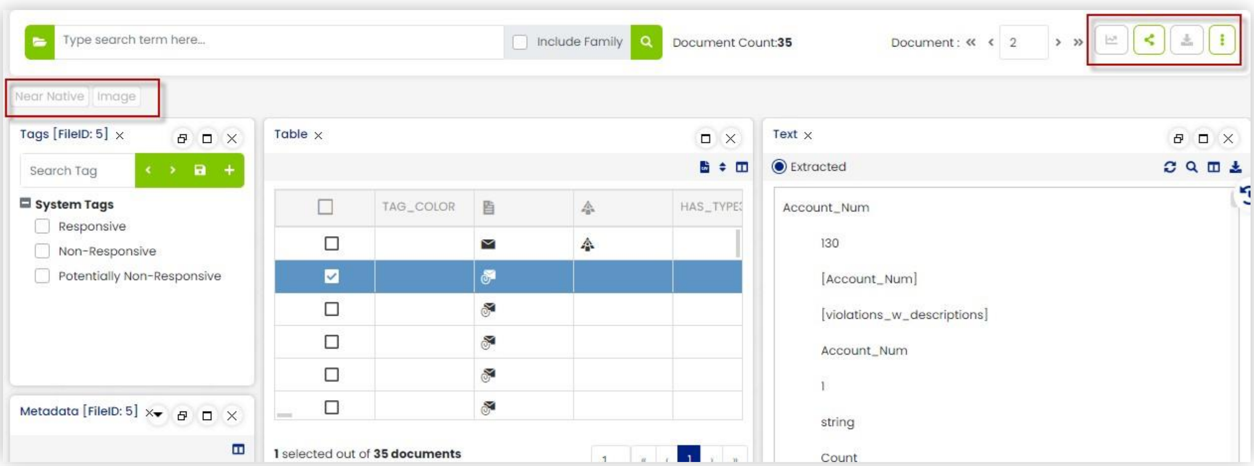


After you click the Create Case button, you will be taken to the screen where you can upload files.

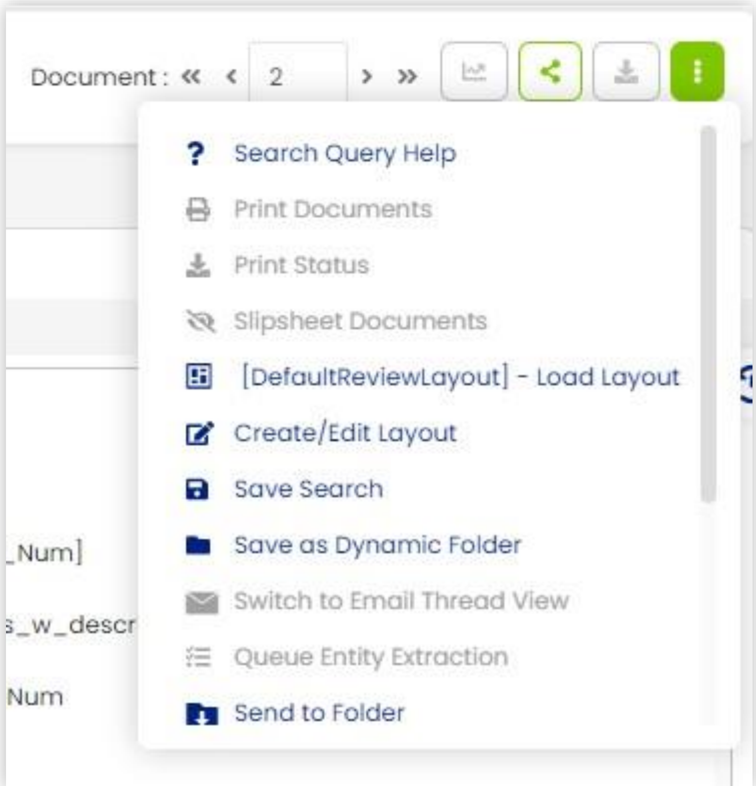
- Image conversion options – Auto-generate images for ingested files will be disabled for TOA

- Sending to Production – For TOA Project, the Sending to Production option is grayed our or disabled in the Analyze page

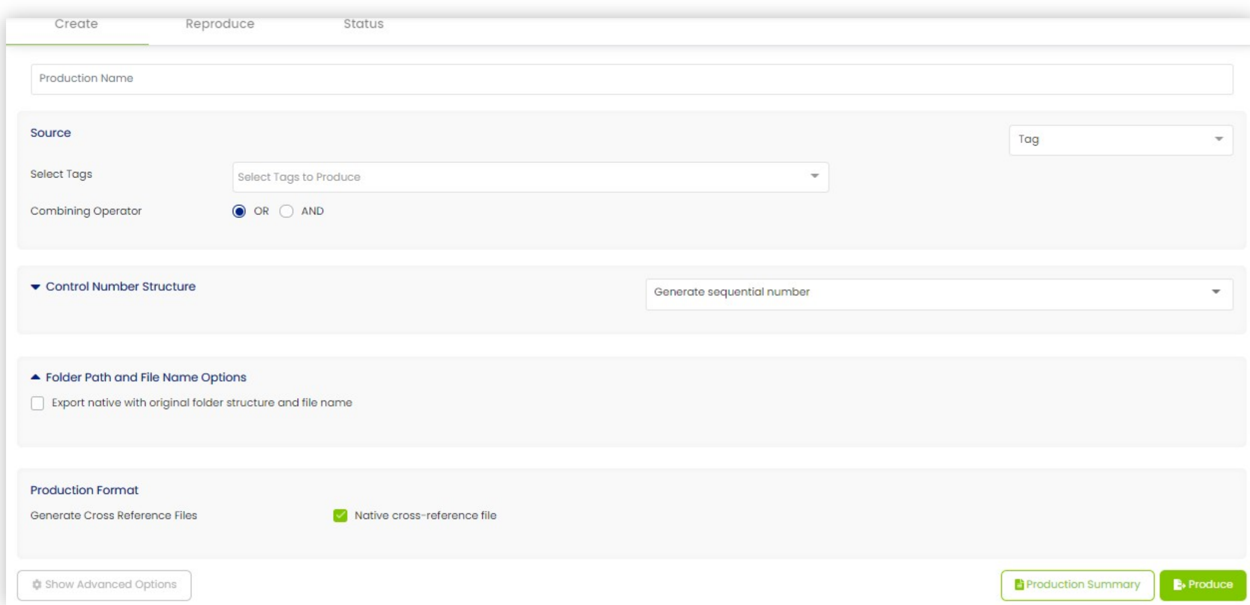
- Full Text Viewer: For TOA project, only full text viewer will be available and other tabs are grayed out or disabled in the Review Page. Also, the user will not be able to send document to analyze and to production pages from Review page in TOA project.



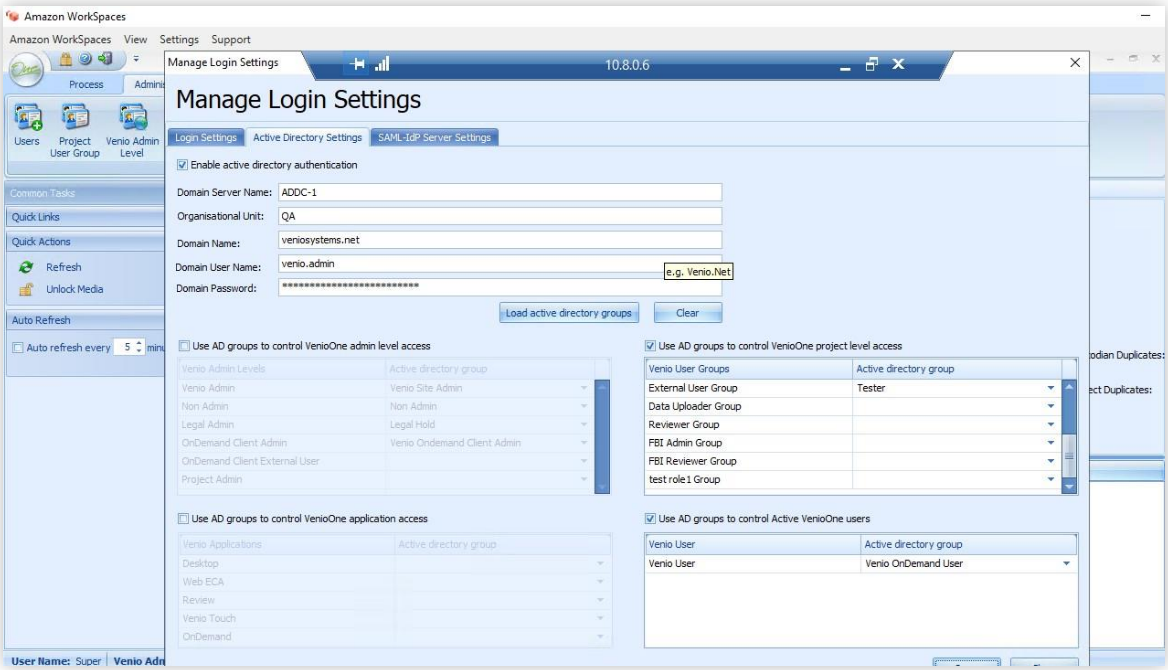
- Image options in Menu – All the options related to images are disabled in the menu options.



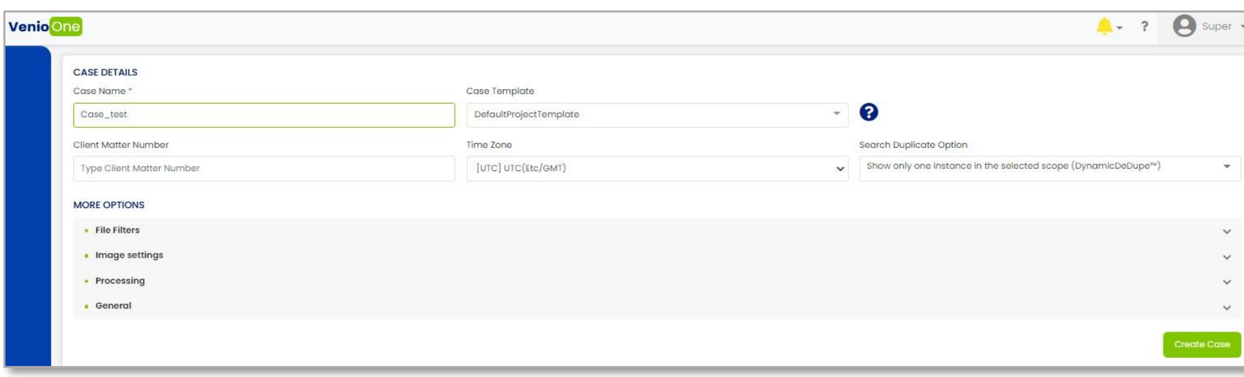
- Show Advanced Options - For TOA projects, the Show Advanced Options buttons will be disabled in the Production page. There will also be change in Folder Path and File Name Options label option name.



- Active Directory Group Mapping - In Active Directory Settings, when the checkbox of "Use AD groups to control VenioOne project level access" is checked, the active directories are displayed in the table below as shown below:



The default values of Active Directory Group Mappings are displayed in Case Creation page in More Options.



Once you have made all the selections in More Options, click on the Create Case button.

Note:

When selecting a location of the new project from the New Project Location field. The available options are Remote Repository and Local.

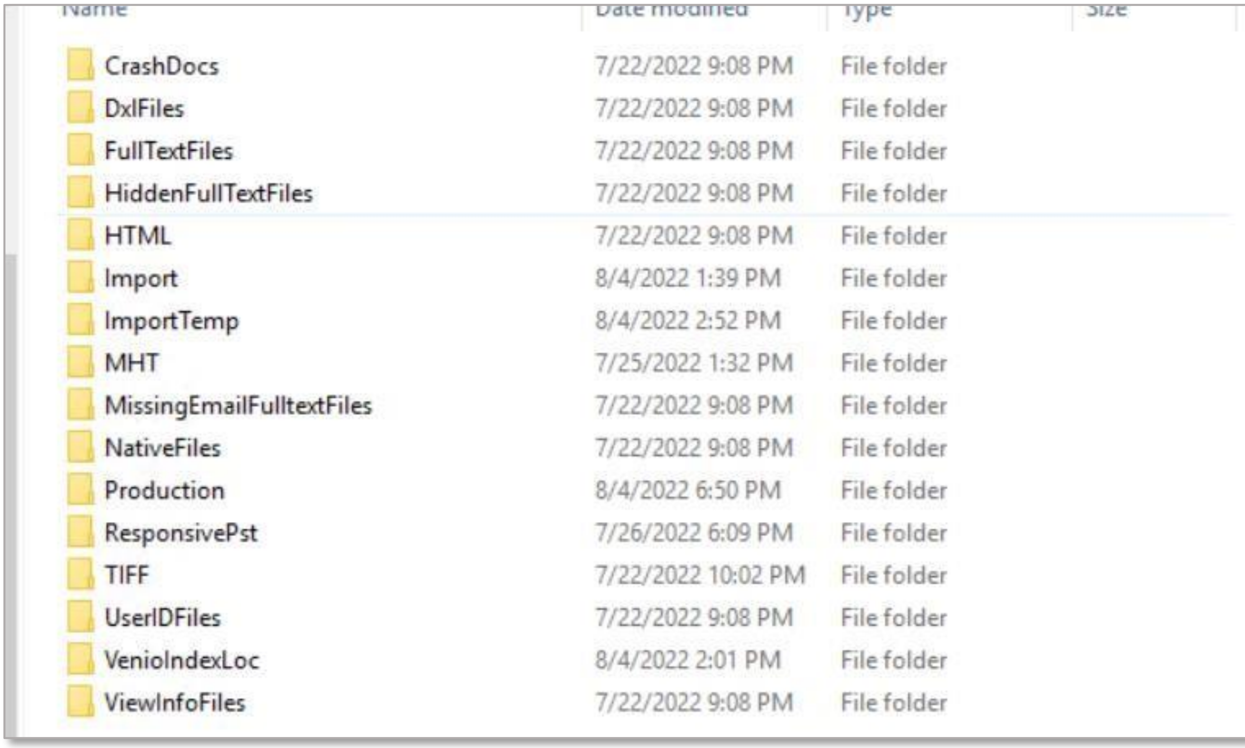
1. Enter the location where you wish to store the replicated project in the field.

2. Click Next.

Venio creates a folder under this directory named after the case name

\\server\sharedfolder\<CaseName>

Within that casename folder, Venio will create a folder structure as seen below

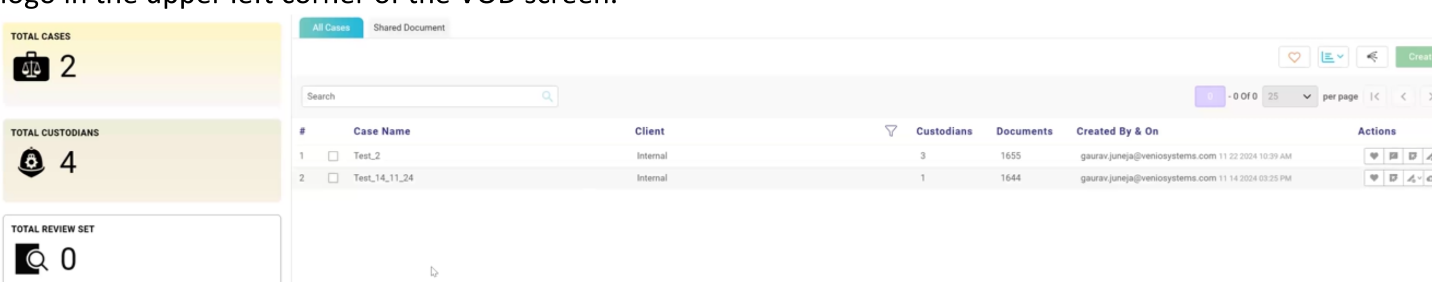


3.5 Opening a Case

As soon as you login to VOD, available cases will be displayed in the Case Launchpad.

NOTE: Those with limited Reviewer rights will only see the Review Set batches assigned to them.

Click the desired Case Name to open a case to the Review Dashboard or use the Search bar to search for a case by name. Return to the Case Launchpad at any time by clicking the logo in the upper left corner of the VOD screen.

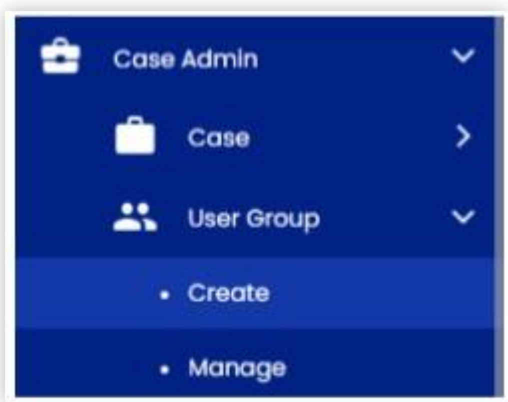


Action Buttons in the right side of each case are used to:

- Favourite
- Review
- Analyze
- Produce
- Upload

4 User Group Association

Users can be assigned to one or more projects, and VenioOne allows users to be assigned to different groups for flexible workflows. The User Group Wizard manages creating and editing user group permissions and information. Create User groups by launching the User Group on the Administration tab.



NOTE: For creating a new user group, atleast one project must be present in the order.

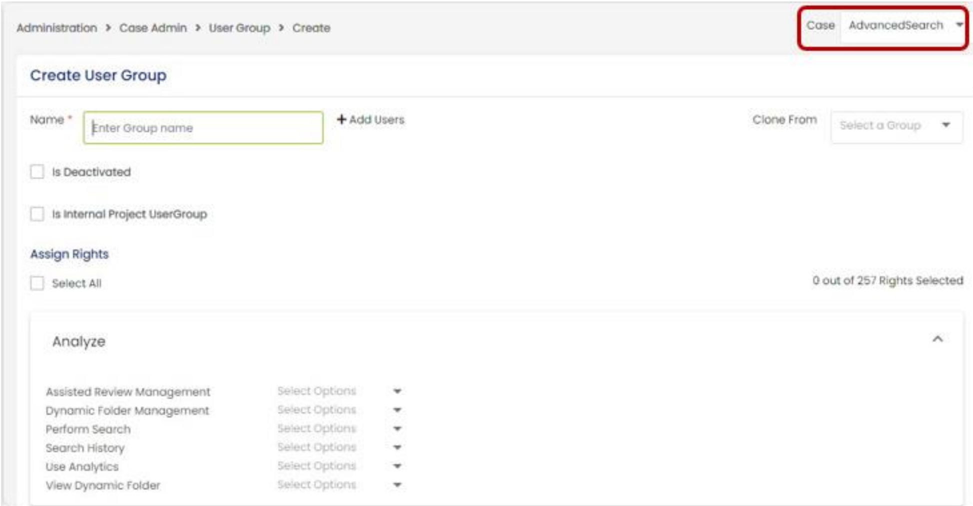
4.1 Creating a New User Group

To manage access to data and areas of the VenioOne interface most efficiently, create custom user groups with custom rights.

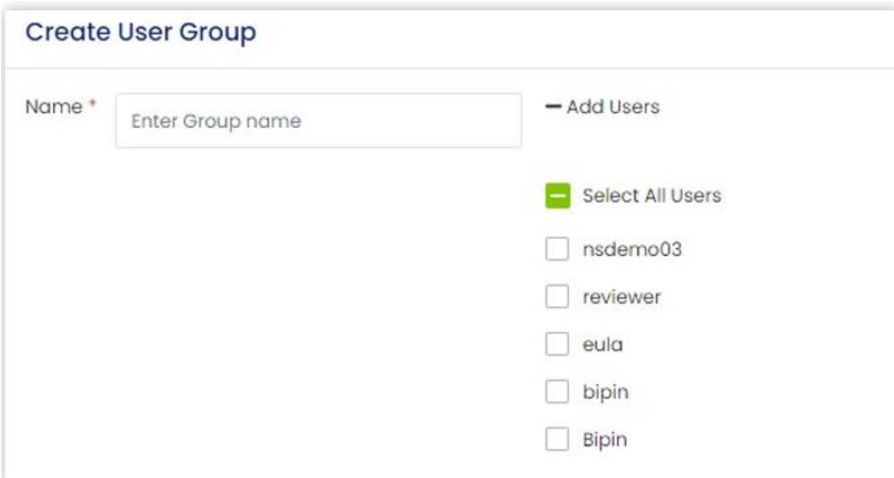
To filter the user group, select the case at the top-right corner of the page. This lists only the user group associated with the case.

1. Navigate to Administration > Case Admin > User Group > Create.

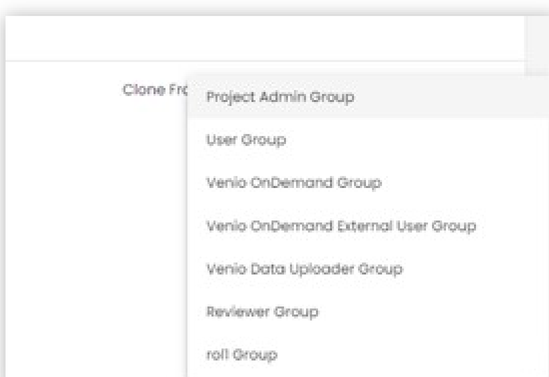
2. Select a case from the top right corner.



3. Enter Group Name.



4. You can also clone the user association group from another group association.
5. Select from the clone list as shown below.

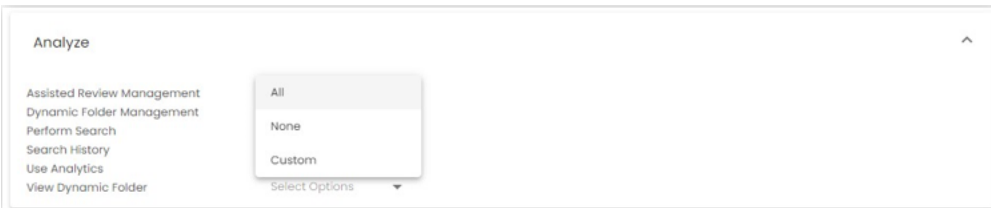


6. To add all users or one user, select the checkbox for Select All Users or the corresponding checkbox of the user. If you want to flag the group as Is Internal

Project Group, select the check box as shown below. This will create an internal project group.

7. To assign rights to the user group, select permission to each feature in different category.

8. Once done, click Clone at the end of the page. You can also click Reset Form to reset the changes and fill in the details.



4.2 Managing a User Group

This page displays all the user groups (inbuilt and custom). You can edit, delete, and clone the user groups from this page.

Navigate to Administration > Case Admin > User Group > Manage.

Click on the  icon to make any changes for the existing user groups.

Make the desired changes and click 

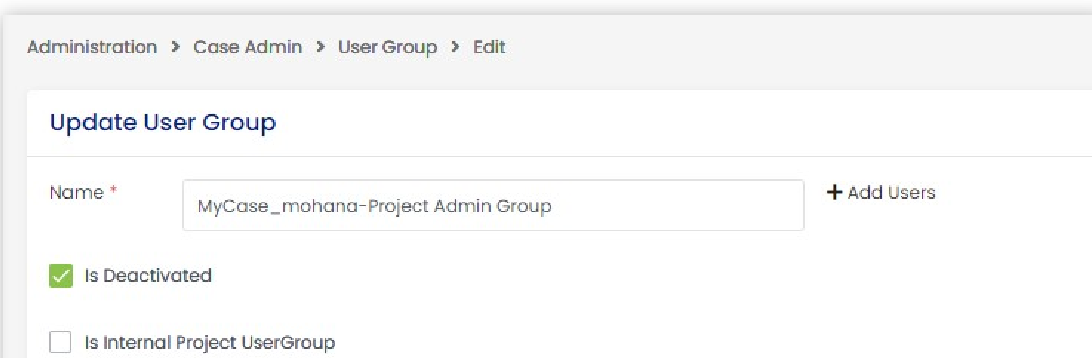
.

The changes are updated.

You may also click 

to reset the changes and refill the details.

If you want to flag the group as deactivated, select the check box as shown below. This will create a group but will be hidden in any other modules.



You can update the user associated with the user group, permission, and clone permission from another user group from this page.

4.3 Deleting a User Group

Click to delete the user group.

NOTE: You can edit the permission for the built user group as required. However Inbuilt user groups cannot be deleted.

4.4 Cloning a User Group

Click to clone the user group. When the clone is successful the word “Clone” is appended to the user group name.

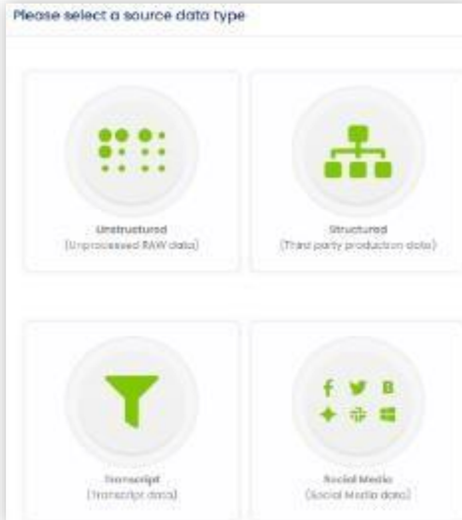
5 Uploading and Processing Data

Data can be uploaded immediately after you create a case, or you can click the Upload button anytime files need to be uploaded.

5.1 Data Types Supported

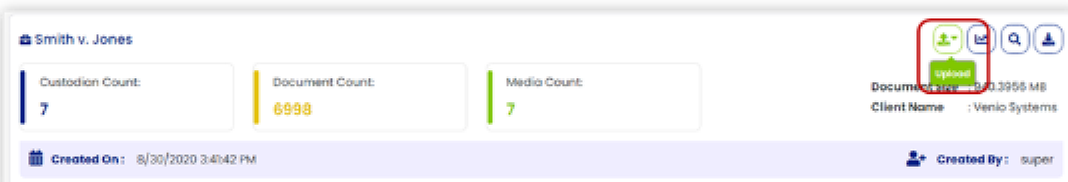
- Data can either be Unstructured raw data in a variety of different formats or Structured, such as third-party production. VenioOne supports virtually all of the structured data export formats used by common eDiscovery platforms.
- Data can also be a Transcript file (.pcf or.ptf format). However, the Transcript option is only displayed when permission is given to the user to upload transcripts.
- Data can also be an export from the following Social Media platforms: Facebook, Twitter, Cellebrite, Slack, and Bloomberg. Social media content can either be individual files or container files.

  NOTE: If the Social Media option is not available, please contact your VenioOne Administrator. After enabling the Fallback engine (Ingestion_Engine_Type = “Fallback” in the control setting table), then the option to upload social media should appear.

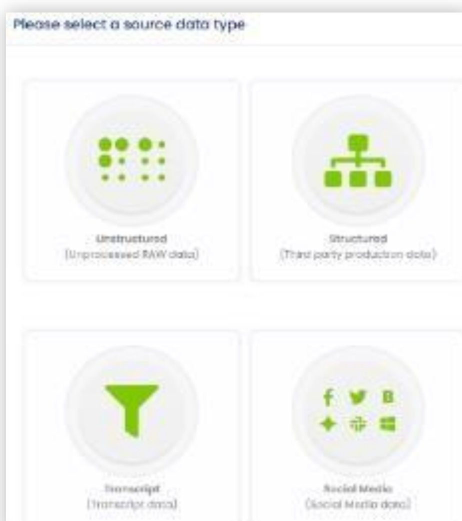


5.2 Uploading Data from the Local Computer

9. Click the Upload button.



Select one of four broad data type options: Unstructured, Structured, Transcript, or one of the Social Media icons.



The source selection screen displays.

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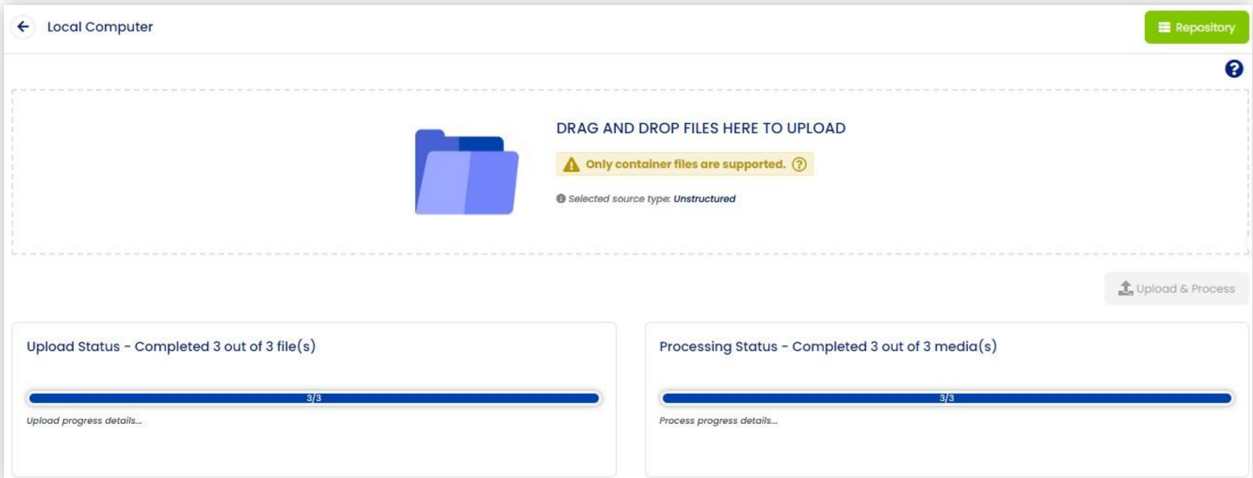
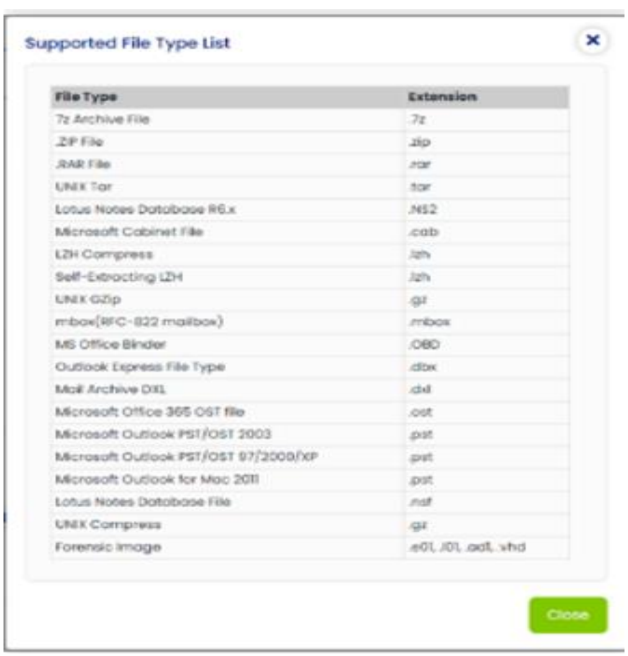
Either click the folder and select the file location on the Local Computer
OR
Click the Repository button (upper right corner) and follow the instructions below.



NOTE: Unless you are using Internet Explorer with an add-on installed (see ActiveX Uploader section below), VOD only allows certain container file types for upload. Click the Only container files are supported. button to view the file types supported.

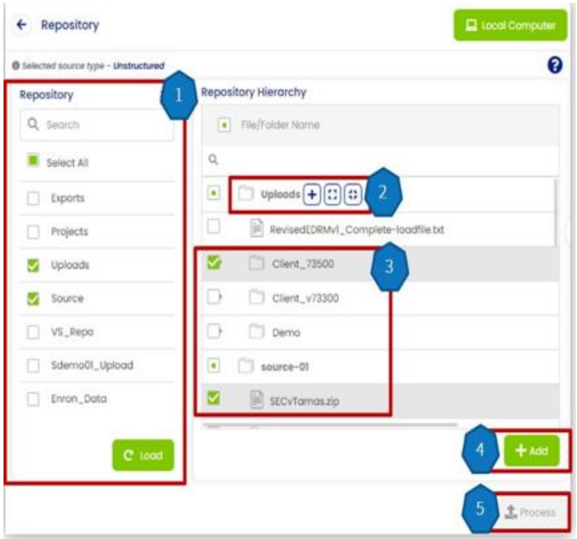


File Type	Extension
7z Archive File	.7z
.ZIP File	.zip
.RAR File	.rar
UNIX Tar	.tar
Lotus Notes Database R6.x	.NS2
Microsoft Cabinet File	.cab
LZH Compress	.lzh
Self-Extracting LZH	.lzh
UNIX GZip	.gz
mbox(RFC-822 mailbox)	.mbox
MS Office Binder	.OBD
Outlook Express File Type	.dbx
Mail Archive DXL	.dxl
Microsoft Office 365 OST file	.ost
Microsoft Outlook PST/OST 2003	.pst
Microsoft Outlook PST/OST 97/2000/XP	.pst
Microsoft Outlook for Mac 2011	.pst
Lotus Notes Database File	.nsf
UNIX Compress	.gz
Forensic Image	.e01, .l01, .ad1, .vhd

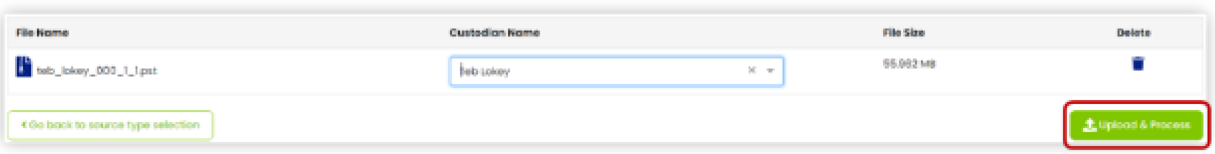
To Upload Data from a File Repository:

1. Select a Repository and click the Load button to display the Repository Hierarchy.
2. Hover over a folder in the Repository Hierarchy section and click the Expand All button.
3. Click to select the folders.

4. Click the Add button to list the files to be processed.
5. Click the Process button.



6. The selected file details will be listed as shown below. Provide the Custodian Name for each file.
   Note: The filename is used as the default custodian and media name.
7. If needed, remove files from the list by clicking on the Delete button ( ).
8. Click the Upload & Process button to upload the files and queue for processing.



The Upload and Process Status will display.

9. Track the Upload and Processing status.

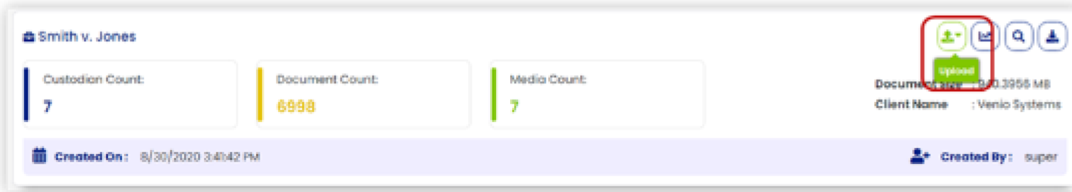
User will receive an email on start and completion of processing.

IMPORTANT: For Structured Data that is being imported into VOD, you will receive an email and inapp notification indicating that the file is uploaded and ready to be processed. You must click the link to start processing the data. See Section 0 below for details.

5.3 Uploading Data from a Data Repository

If a data repository has been associated with the client, it will be available to select from within the Upload process.

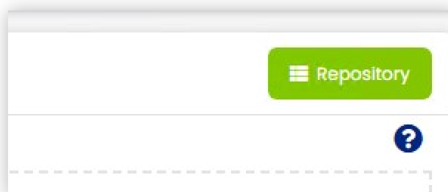
Click the Upload button.



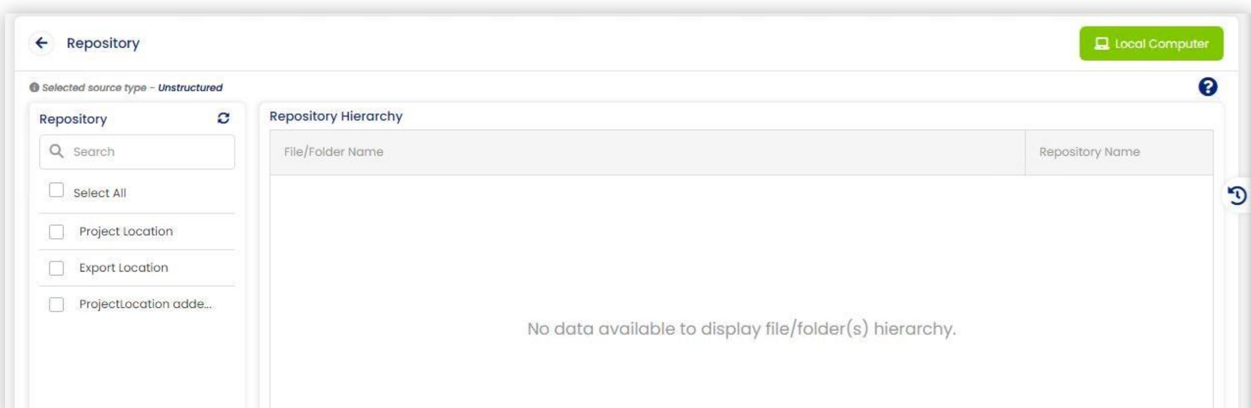
Select one of four broad data type options: Unstructured, Structured, Transcript, or one of the Social Media icons.

The source selection screen displays.

Click the Repository button in the upper right corner.

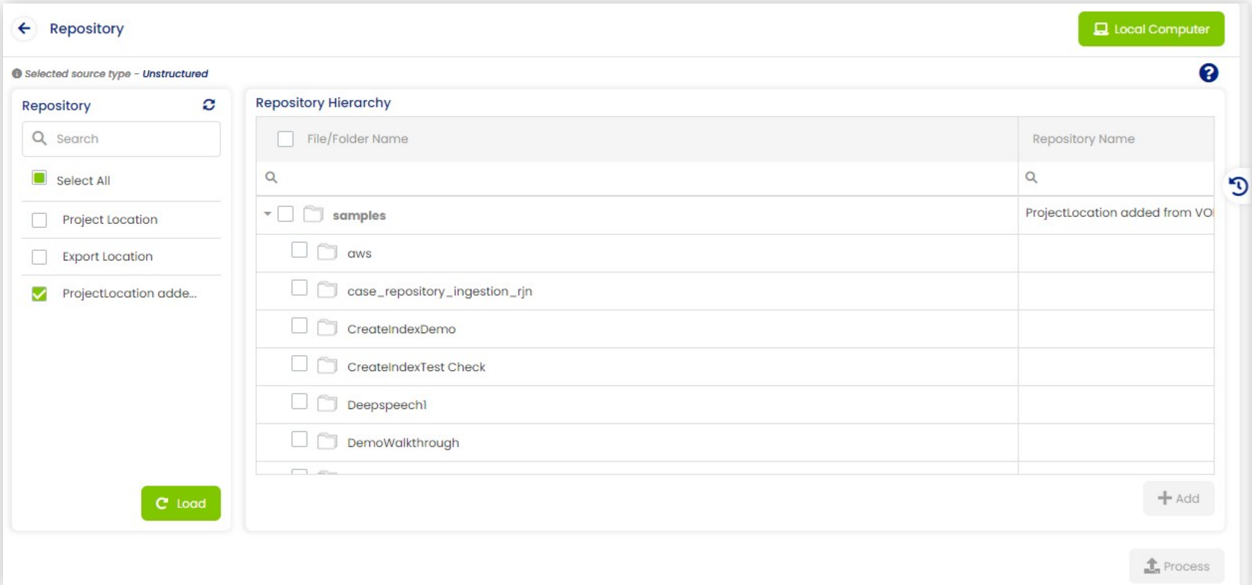


The repository selection screen displays.



Select a Repository(ies) from the list, and then click the Load button (bottom left).

A list of folders and/or files within the repository will be displayed in the Repository Hierarchy section.



NOTE: When you hover over the root folder, three buttons will display:

- Add - Adds the files for processing
- Expand - Expands the folder hierarchy
- Collapse - Collapses the folder hierarchy

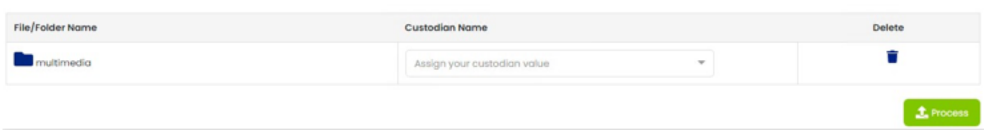
If the files are already expanded, then there will only be 2 buttons displayed – Add and Collapse.

Either click the Add + button next to a folder OR
Place a check mark next to the items to be uploaded and click the Add button (bottom right).

The items to be uploaded will be listed with a space for the Custodian Name to be entered.

Either select a Custodian Name from the drop-down list or enter a name.

Note: If no custodian name is provided, the file/folder name will be used as default custodian name. When multiple file/folder(s) are assigned to a single custodian, selecting the custodian name will be mandatory.



NOTE: If needed, remove files from the list by clicking the Delete button.

Click the Process button to upload the files and queue for processing.

The Upload and Process Status will display as shown below.

Track the Upload and Processing status.

User will receive an email on start and completion of processing.

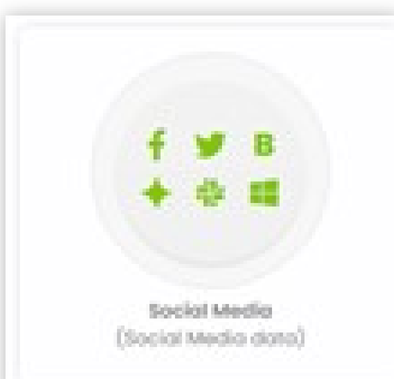
IMPORTANT: For Structured Data that is being imported into VOD, you will receive an email and in-app notification indicating that the file is uploaded and ready to be processed. You must click the link to start processing the data. See Section 5.5 below for details.

5.4 Processing Social Media, Chat, and Mobile Data

VenioOne will process the data from a variety of social media and team chat platforms, as well as Cellebrite mobile data. The majority of the data is processed into.eml files, so it can be viewed using Venio's Social Network Diagram and other Email Analytics tools.

Specifics on what export formats are needed and how the data will be presented for each different type of data is detailed in the subsections below.

NOTE: Some of these settings are available only when the ingestion engine is set to the FALLBACK Ingestion engine, so check with your VenioOne administrator, if you do not see them.



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5.4.1 Viewing Social Media, Chat, and Mobile Data

The individual.eml files generated by VenioOne can not only be loaded into VenioOne, but also opened with Outlook, Outlook Express, Thunderbird, etc. You could also open the.eml files with a text viewer, but it is not very readable due to the coding that is displayed.

There are other tools that convert XML to PST, but it's really horrible e.g., each email file may have hundreds or thousands of recipients if sent to the whole company. We parse the data such that different chats are placed into folders containing the.eml files by date.
The files ingested include any emojis, GIFs, videos, and other attached files and links. Some of the social media and chat data can be filtered by person and date as well. All of these can be searched and reviewed using VenioOne's full suite of review tools.

5.4.2 Cellebrite Data

You should have an image from a mobile device created in Cellebrite, which the person doing the collection has licensed. Cellebrite allows you to export in XML. Venio uses the Cellebrite XML output to parse the data into a format that is then loaded into VenioOne for search and review. It will even display the communications data in our Social Network Diagram (spider web view of communications).

Caveat: Garbage In. Garbage Out. We can only use the data that Cellebrite has created in their image.

5.4.2.1 Processing Cellebrite Data

The processing of Cellebrite data creates one folder per item type. The contents of each folder are:

- SMS, MMS, Chat will be ingested as.EML files
- Contacts will be ingested as.VCF files
- Calendar will be ingested as ICS files

The rest will be ingested as CSV files as follows:

- Calls - One CSV file listing the type, start time, duration, and who started the call
- Location – Single CSV file listing the date, time, and coordinates
- Installed Apps - Single CSV file listing the app name, version, and description
- Password - One CSV file listing the account, data, and label

The time for processing depends on the size of the Cellebrite data and your environment but is generally 1.5-2 GB/hr. on average.

5.4.2.2 Viewing Cellebrite Data

After the Cellebrite data is ingested into VenioOne, you may use any of the usual functions for processing data. For example, our Email Analytics tools will show the breakdown of communication and connections within the text messages from the Cellebrite data.

5.4.3 Slack Data

To use Venio's Slack ingestion, the Slack admin must download the data from Slack, which is in JSON format. VenioOne processes the data and creates.eml files that are then loaded into VenioOne for search and review.

5.4.3.1 Processing Slack Data

VenioOne creates one.eml file per day that includes all of the Slack Channels. Each channel gets a separate folder. Any embedded images in the Slack discussion are included in the.eml files. Any attachments are downloaded as well. If there are private chats, those are included as.eml files in folders for each chat.

There are other tools out there that convert XML to PST, but it's really horrible e.g., each email file may have hundreds or thousands of recipients if sent to the whole company. We parse the data such that different chats are placed into a folder containing the.eml files by date.

5.4.4 Bloomberg Data

Bloomberg has a communication platform that is similar to Slack, which includes chat, email, etc. An XML export can be done within the Bloomberg environment that VenioOne processes to extract the data in a useable format for discovery.

There are other tools out there that convert XML to PST, but it's really horrible e.g., each email file may have hundreds or thousands of recipients if sent to the whole company. We parse the data such that different chats are placed into a folder containing the.eml files by date.

5.4.5 Facebook Messenger Data

VenioOne processes the JSON export from Facebook Messenger into.eml files that are presented in VenioOne for search and review using all of our available tools.

5.4.5.1 Exporting from Facebook

The steps below will walk you through the process of exporting the Facebook Messenger JSON data from Facebook. These steps may change from time-to-time, but this should at least get you started.

Login to the Facebook account.
Go to Settings and Privacy > Settings > Your Facebook information.
Click download your information.
On the Request copy tab, select the Date Range, Format and Media Quality.

NOTE: The format selected should be JSON.
In the Your Information section, select the Messages checkbox only.
Click the Create File button.
The download request will be sent to Facebook.
Check the Available copies tab.
After Facebook sends the Your Facebook information file is ready to download notification, then click the notification and click Download button.
The download archive is what you will upload to VenioOne.

5.4.5.2 Processing FB data

Email(.eml) messages are generated in VenioOne based on the file splits selected in the Social Media Settings used in the Ingestion Settings step of the Project Setup Wizard in the Desktop Console. For example, in the screenshot below, each 500 messages generate 1.eml file. Whereas, if the entire conversation option is selected, there will only be a single.eml file generated.

The back end uses the folder structure provided by Facebook, i.e. the archive file which is downloaded and ingested in VenioOne.

NOTE: These settings are available only when the ingestion engine is set to the FALLBACK Ingestion engine, so check with your VenioOne administrator, if you do not see them.

5.4.6 Twitter Data

5.4.6.1 Exporting from Twitter

Go to: https://help.twitter.com/en/managing-your-account/how-to-download-your-twitterarchive and follow the steps there. It generally takes about one day from the request time to get the file. The file will include messages, tweets, and retweets. You will then upload the zip file you receive into VenioOne.

5.4.6.2 Processing Twitter data

Email(.eml) messages are generated in VenioOne based on the file splits selected in the Social Media Settings used in the Ingestion Settings step of the Project Setup Wizard in the Desktop Console. For example, in the screenshot below, each 500 messages generate 1.eml file. Whereas, if the entire conversation option is selected, there will only be a single.eml file generated.

The back end uses the folder structure provided by Twitter i.e., the archive file which is downloaded and ingested in VenioOne.

NOTE: These settings are available only when the ingestion engine is set to the FALLBACK Ingestion engine, so check with your VenioOne administrator, if you do not see them.

5.4.7 Microsoft Teams Data

For a successful login into the MS Team chat, preconfigure a few basic settings:

- For configuring Hosted URL: Hosted URL must have "https" otherwise the user cannot see the login screen through which the user can upload MS Team Chat data.

  Update the WEB_BASE_URL and VOD_API_URL in the control setting table with https.

  Update tbl_pj_controlsetting set value='https://hostedwebUrl' where [key]='WEB_BASE_URL'

  Update tbl_pj_controlsetting set value='https://hostedAPIUrl' where [key]='WEB_VOD_API_URL'

- Create a new application in Microsoft Azure and proceed with generating the application Id or client Id. This id needs to be updated in the oauth client id in the control settings. For the process to update URL refer to the admin user change guide.

For generating new OAUTH ID you must do the following configuration:

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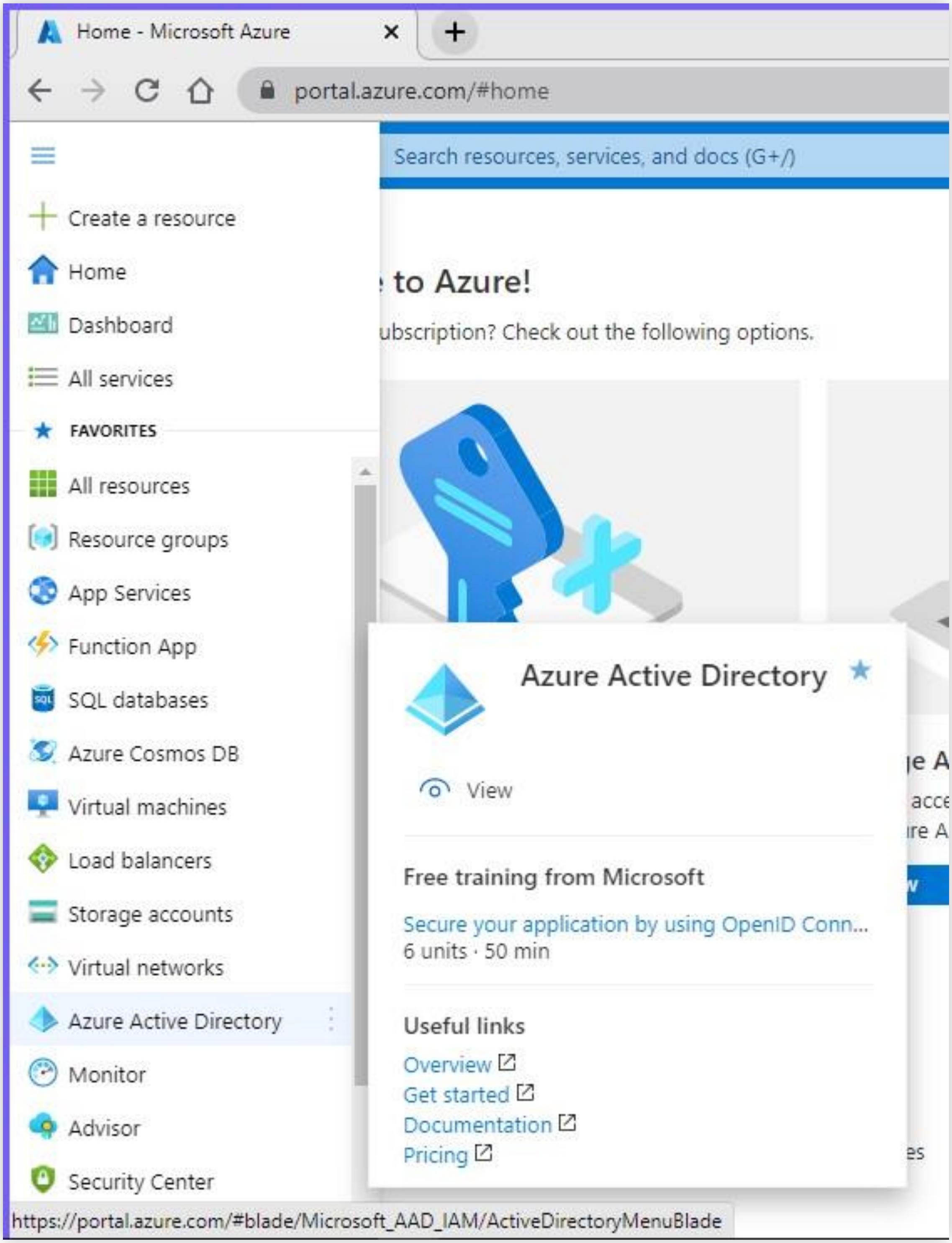
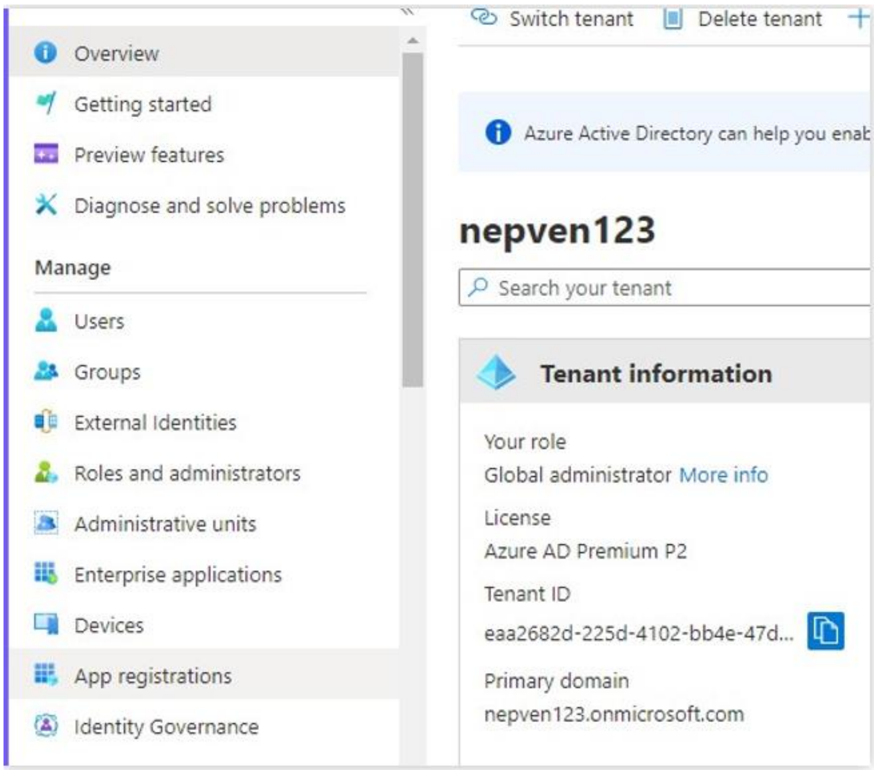
1. Go to https://portal.azure.com/
2. Login with Microsoft account (admin account)
3. Expand portal menu (Top left)
4. Select Azure Active Directory

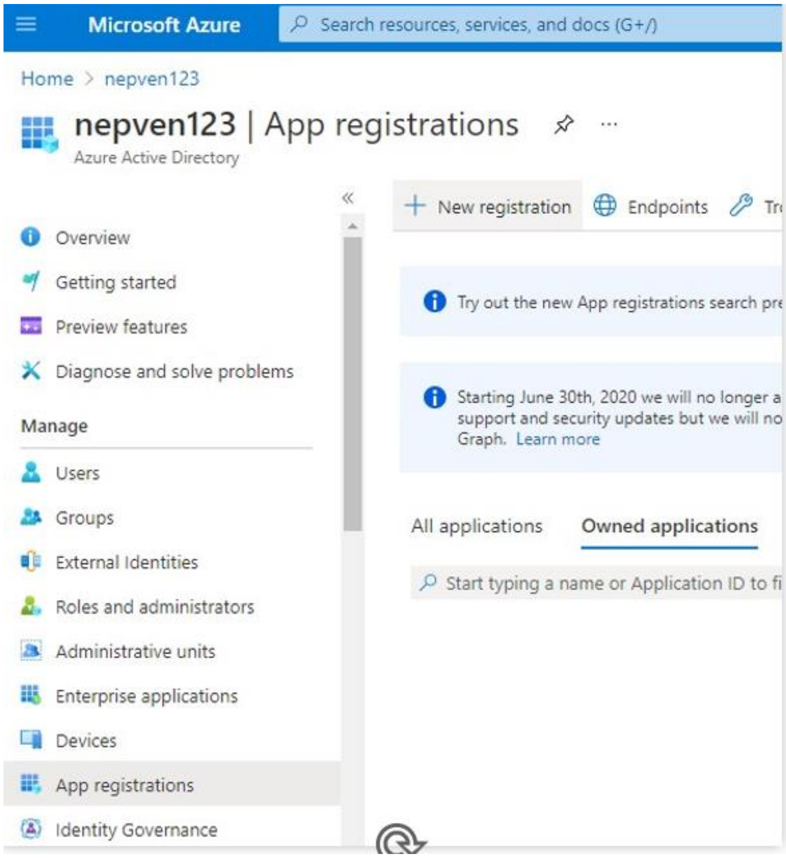


7. From the Manage option in portal menu, select App registration.

Note: A user must have an account in MS Team to access MS Team chat.



8. Click New Registration. Enter the name of the application.

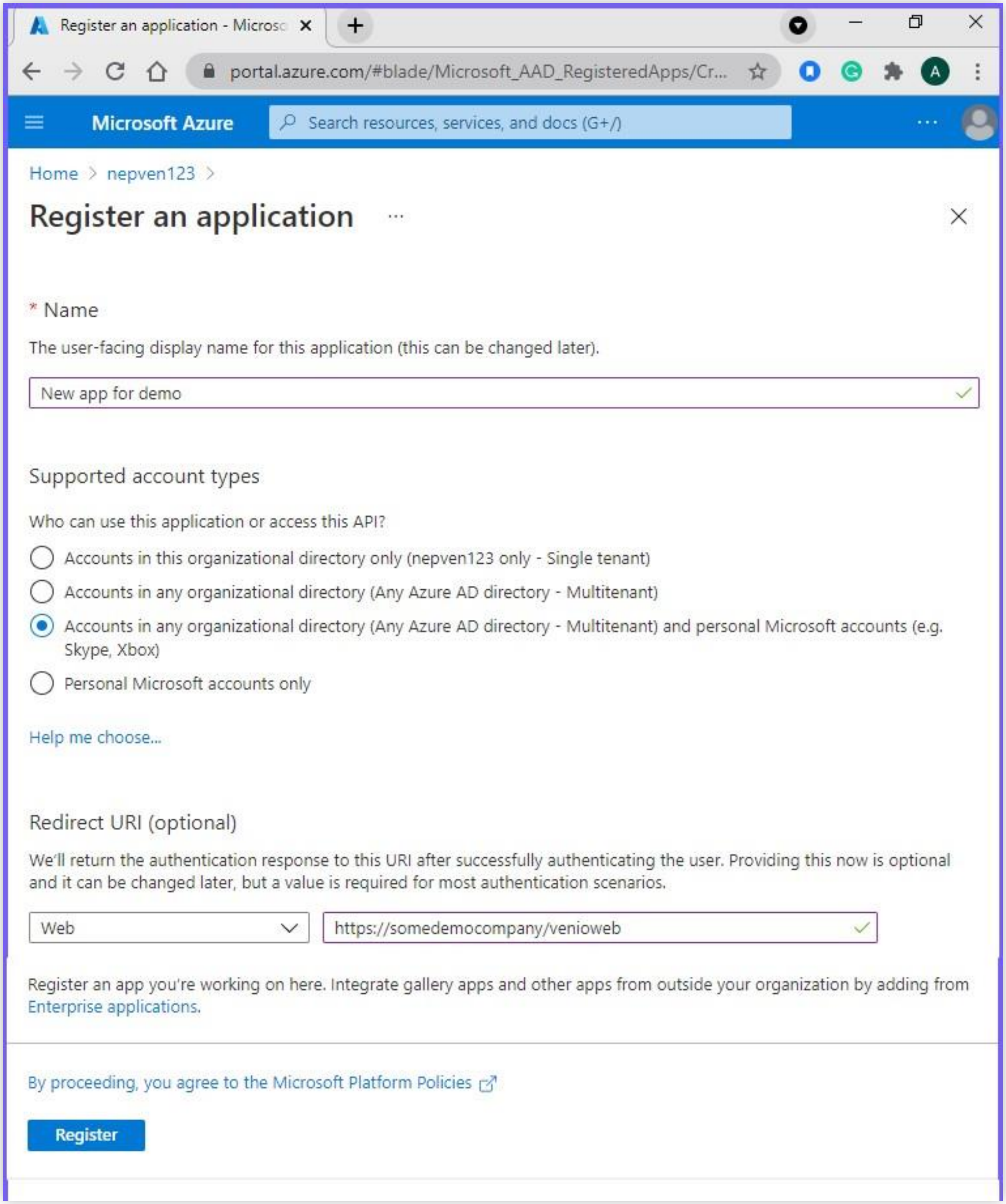


9. In supported account types, select appropriate option such as: "Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g., Skype, Xbox)". In here, choose one of the four options that best suits the production environment.

In Redirect URI, select "Web" and enter the value of Web_Base_URL from tbl_pj_ControlSetting. E.g., https://nsdemo01.ad.veniosystems.com/venioweb
Note - Url must start with "https" or "http://localhost"

10. Click Register.

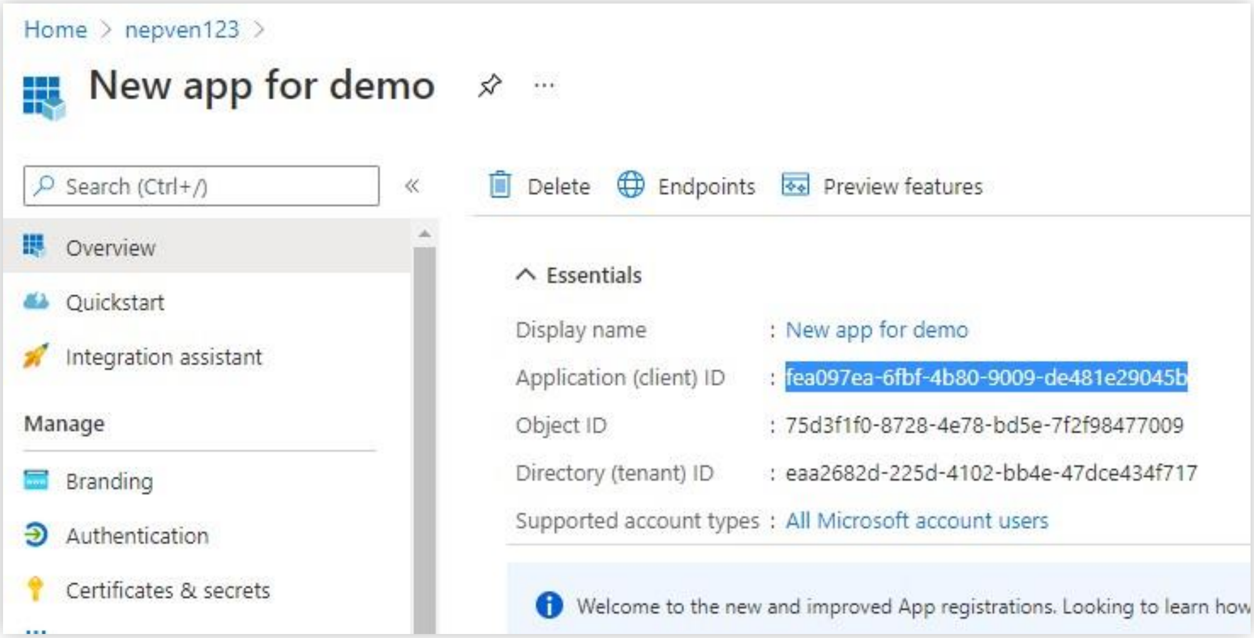
Venio



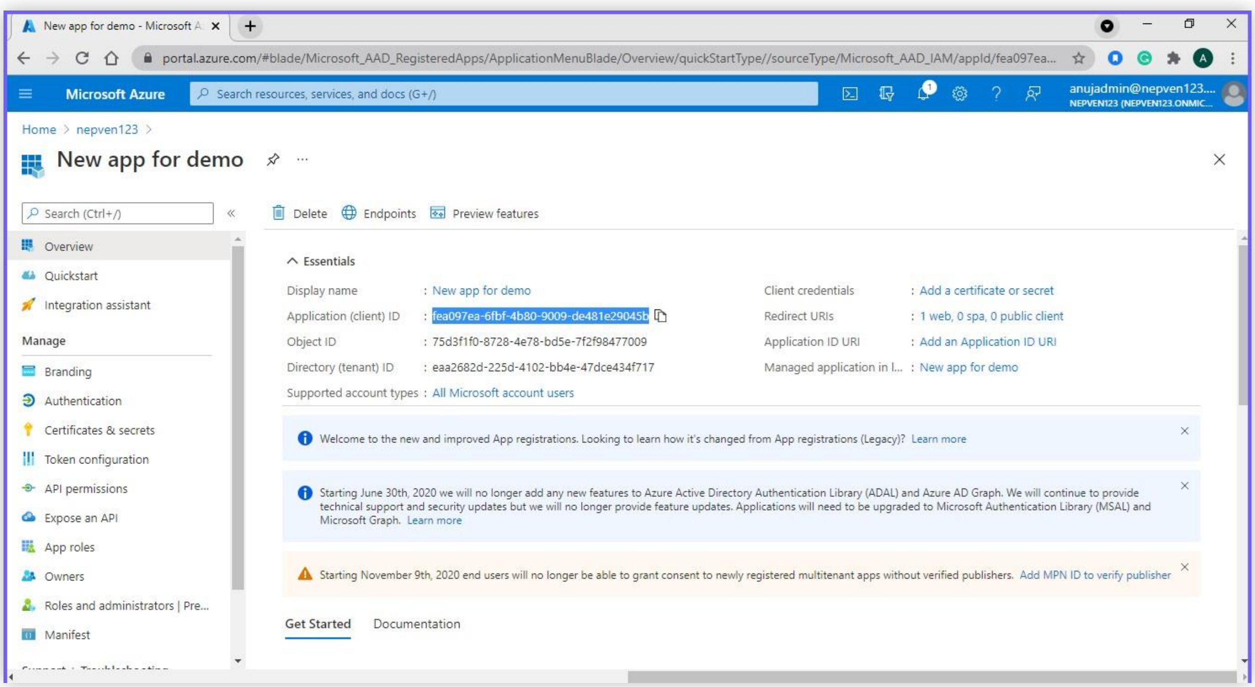
11.

11. After registration, the site redirects user to the Application page. Copy the value of Application (client) ID and update value for OAUTH_CLIENT_ID in tbl_pj_ControlSetting.

Venio



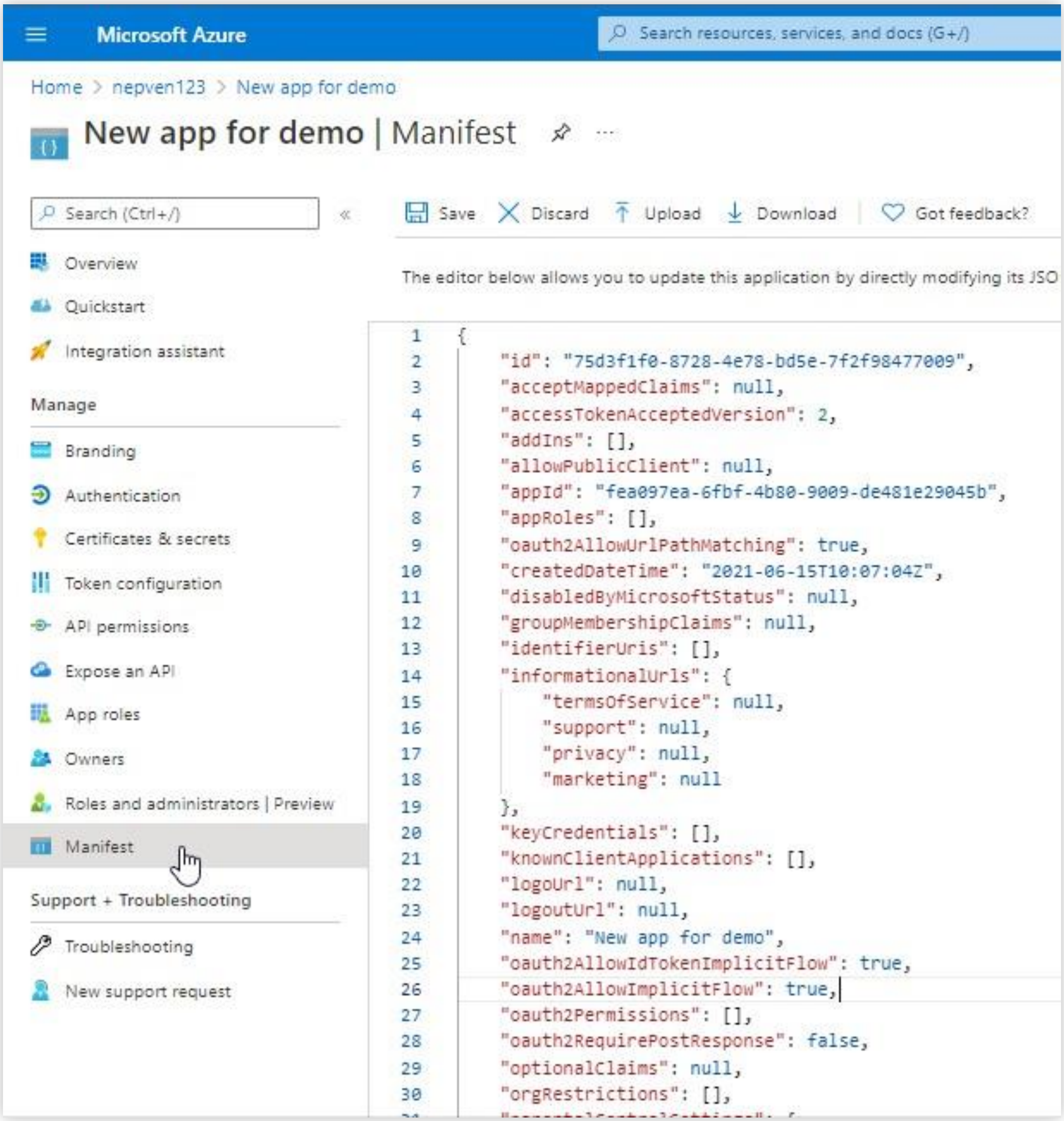
In the future if there is any change in the web base URL, we can modify the same in the redirect URI in the same screen (right to the application (client) Id).



12.

12. Go to Manifest from the left panel and verify the following settings have 'true' in their values. If the values are 'false', change the values to 'true' and save.

- "oauth2AllowUrlPathMatching": true,
- "oauth2AllowIdTokenImplicitFlow": true,
- "oauth2AllowImplicitFlow": true,



Make sure the web server machine is configured to support the VoD web site to run in https in the IIS manager. That said, for MS Team, the ondemand application should be run in https as well.

Also values for the following keys of the control setting table should be configured to https as well -

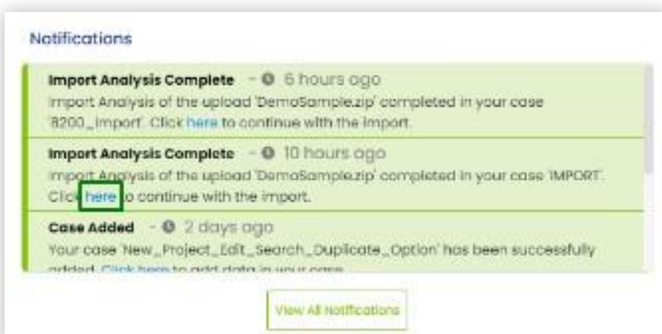
WEB_BASE_URL eg https://nsdemo01.ad.veniosystems.com/venioweb

VOD_API_URL eg https://nsdemo01.ad.veniosystems.com/VenioOnDemandAPI/vod/services

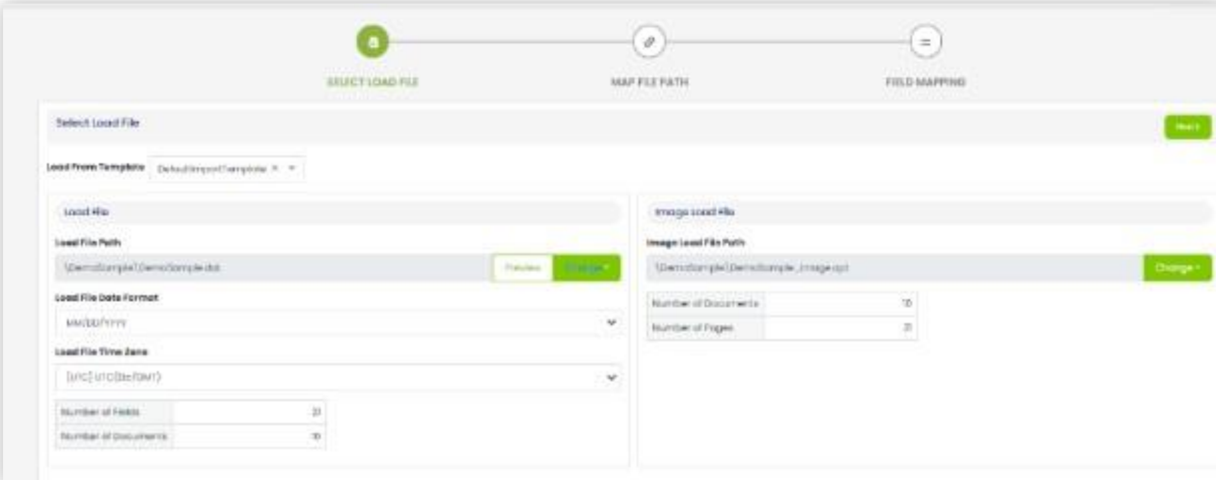
After all the above settings are done for MS Team chat user can upload and process the data in the MS Team Chat from VOD.

5.5 Processing Structured Data

As soon as structured data has been uploaded, you will receive an in-app notification and email indicating that the file is uploaded and ready to be processed. You must click the link in the notification/email to start processing the data.



The Select Load File dialog displays.



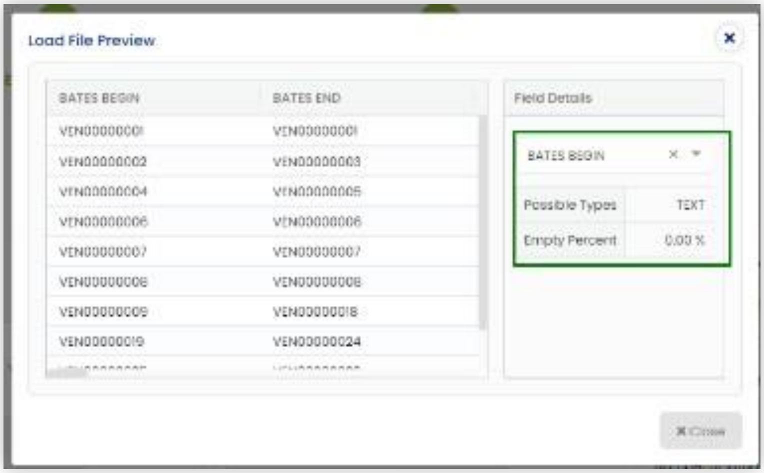
1.

1. Choose a template from the Load from template drop-down list for field mappings. The *DefaultImportTemplate* is selected by default.
2. Change the Load File Path, Date Format, and the Time Zone as needed.
3. Change the Image Load File Path as needed.
4. Click the Next button to navigate to the Map File Path page.

NOTE: In this step, you may preview the default template to review the field mapping information.

Click the Load File Preview button.

The Load File Preview dialog displays with field details.



Select the field type from the drop-down list on the right and view the preview on the left side of the dialog.

Click the Close button when you're done to return to the Map File Path page.

In the Map File Path page, you may:

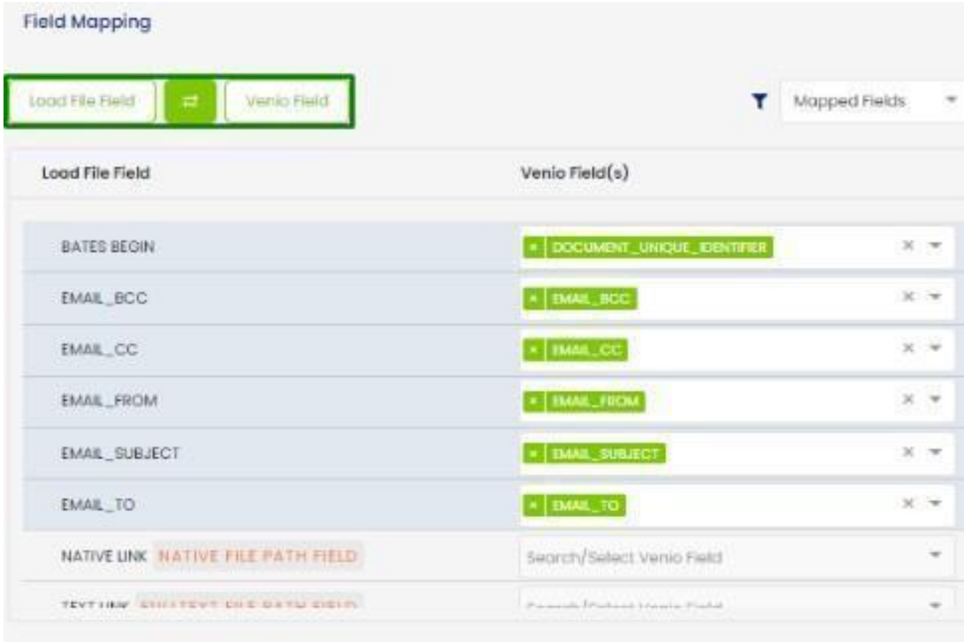
- Toggle which items are processed - Full text, Native, or Image
- Select/update the Mapping Fields (Full text, Native, or Image)
- Update the Folder Paths (Full text, Native, or Image)
- View the Number of Files (Full text, Native, or Image) in each folder at the bottom of the table.

When the settings are complete, click the Validate Paths button to validate the mapping.

A message displays to confirm that the paths are valid. If the information is not accurate, it will display an error message. Click the Previous/Next buttons as required.

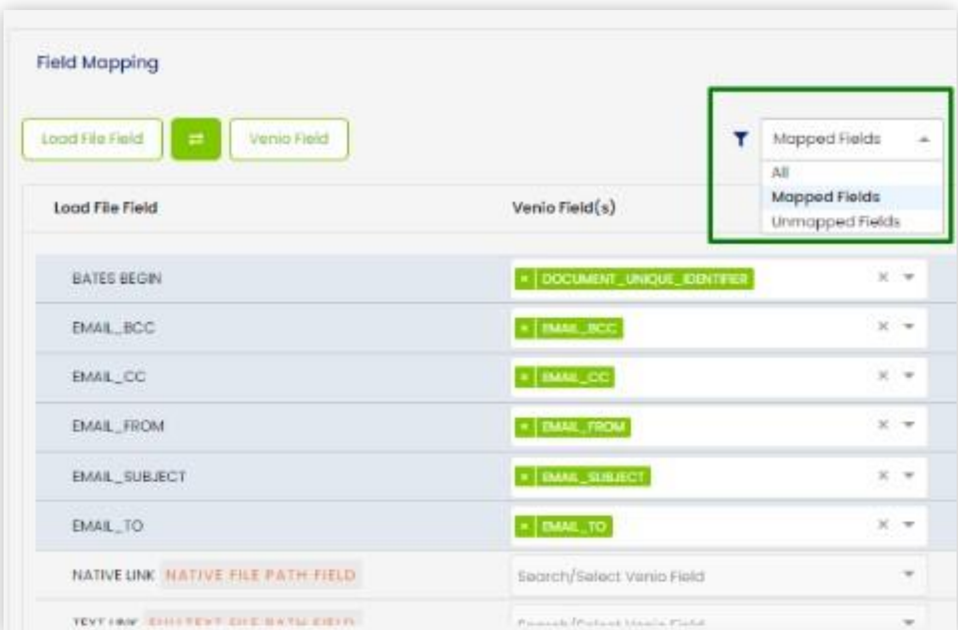
Click the Close button.

The Field Mapping page displays.



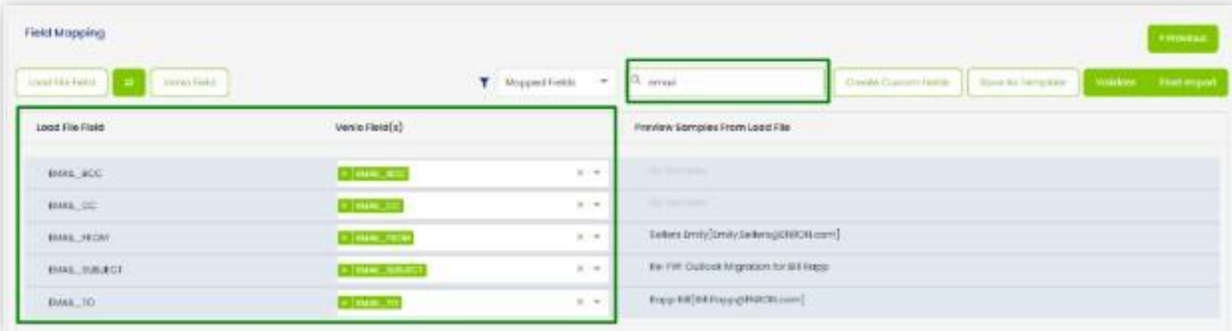
In the Field Mapping page, you may :

- Switch between the Load File Field and Venio Field
- Filter and configure by Mapped /Unmapped/All fields using the drop-down.

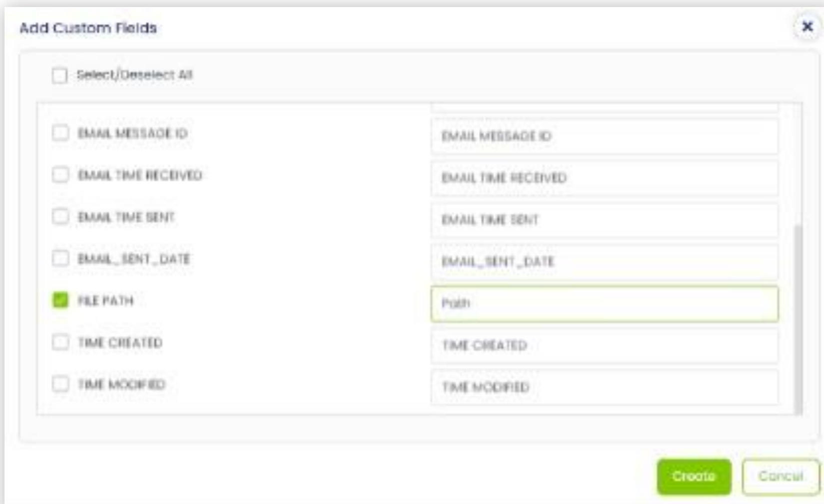


- Use the search field to search for specific fields.

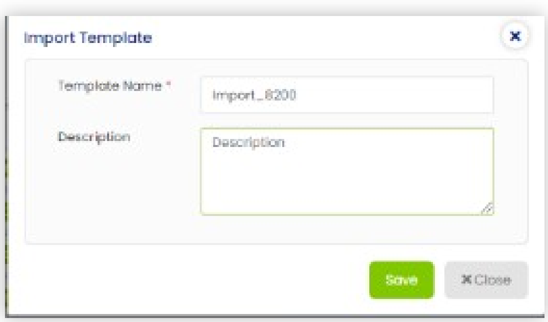
Venio



- Click the Create custom field button to create custom field names. Enter the name(s) and click the Create button.



- Click the Save as Template button to save your settings as an Import Template to reuse these settings. Enter a Template Name and Description. Click the Save button to complete the process.



Once all of the fields are mapped, click the Validate button.
After validation is successful, click the Start Import button to start importing the data.

The Import Progress dialog will update as the import progresses.

When the import status reaches 100%, click the Case Launchpad button to navigate to the imported case

5.5.1 Adding Media to Custodian

When uploading structured data, you can assign media to a custodian. The Custodian can either be selected from an existing list or a new one can be created in VOD.

5.5.1.1 Add Custodian

You can import data to the custodian in two ways:

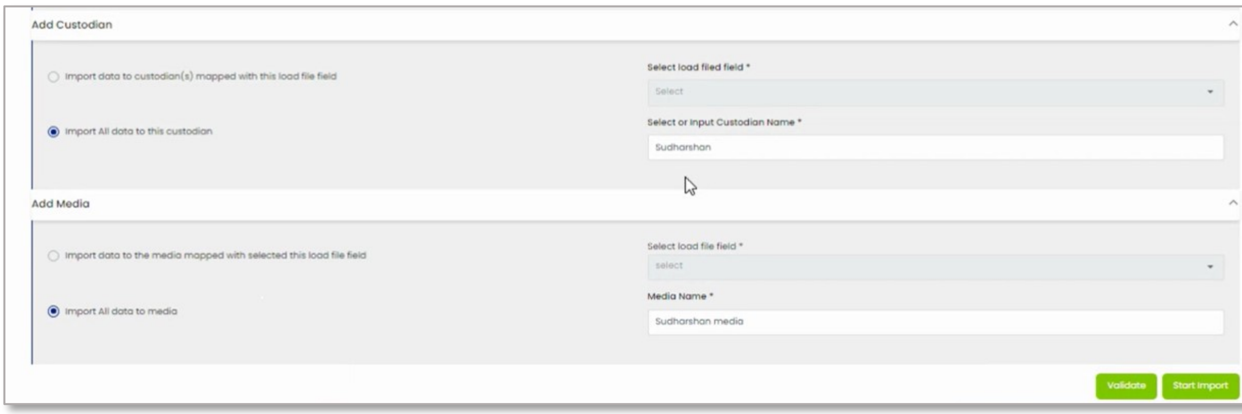
- Import data to custodian(s) mapped with this load file field – Using this option you can select an existing load file field to import data to custodians.
- Import All data to this custodian – Using this option you can selector enter the custodian's name to import the data.

5.5.1.2 Add Media

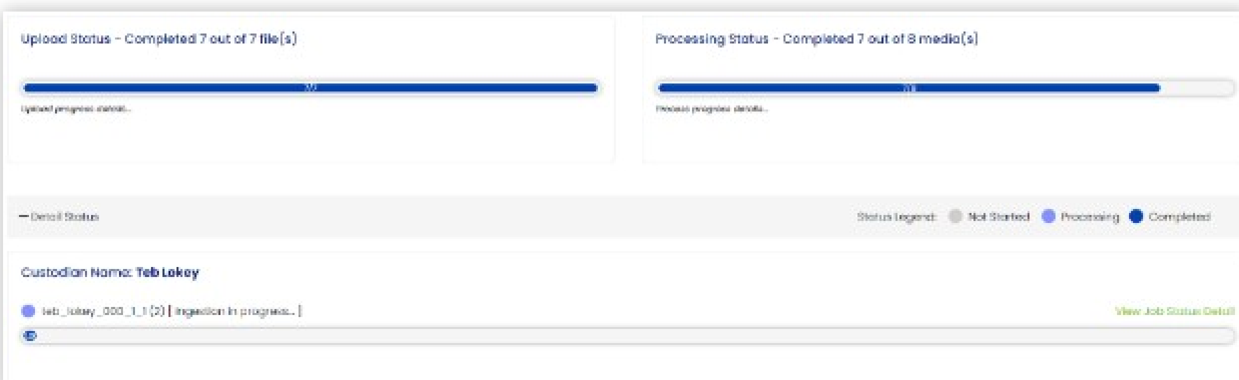
You can import data to the media in two ways:

- Import data to media mapped with this load file field – Using this option you can select an existing load file field to import data to media.
- Import All data to this media – Using this option you can selector enter the media to import the data.

While field mapping, you can add custodian and add media with the fields provided and click Import. A notification confirms once the import is complete.



5.6 Tracking Upload and Processing Status

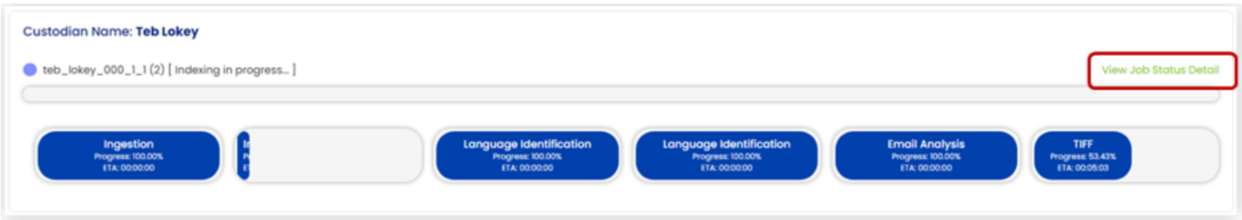


The Upload Status section (on the left above) shows the status of the files being uploaded. The Processing Status section (on the right above) shows the media being processed. The status of each file being uploaded or processed is displayed as a progress bar.
Click the Detail Status link (on the left above) to view processing details.

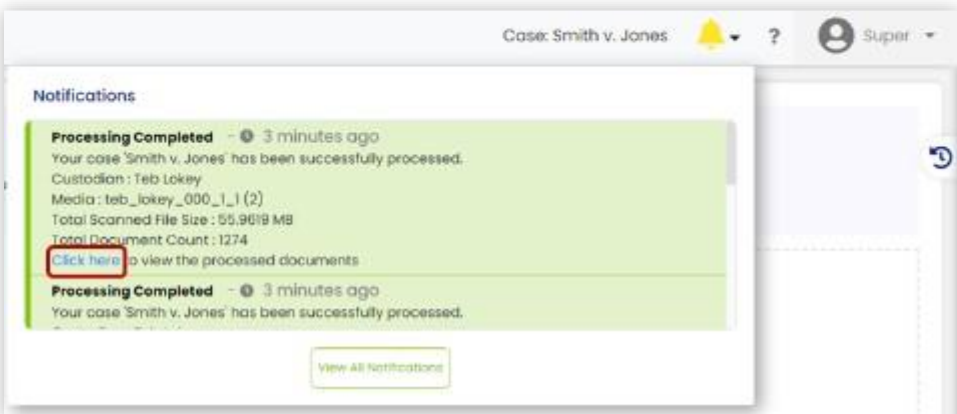
- Dark blue represents files whose processing has completed
- Light blue are the files being processed
- Gray are the files whose processing has not yet started

Venio

Click the View Job Status Detail link (on the right below) to view the details of the Ingestion, Indexing, Language Identification, Email Analysis, and TIFF jobs as a percentage.



When processing completed, the Notification button will update. Click the bell icon to review the new notifications.



You can also see a list of notifications such as processing started, processing completed, case added, etc. with details and the time processing started. The details include:

- Custodian name
- Media added date
- Total scanned file size
- Total document count

Clicking the Click here link will take you to the:

- Analyze page if documents are processed
- Upload page with processing status if documents are started processing · Upload page if case is being added

5.7 View Project Settings Report

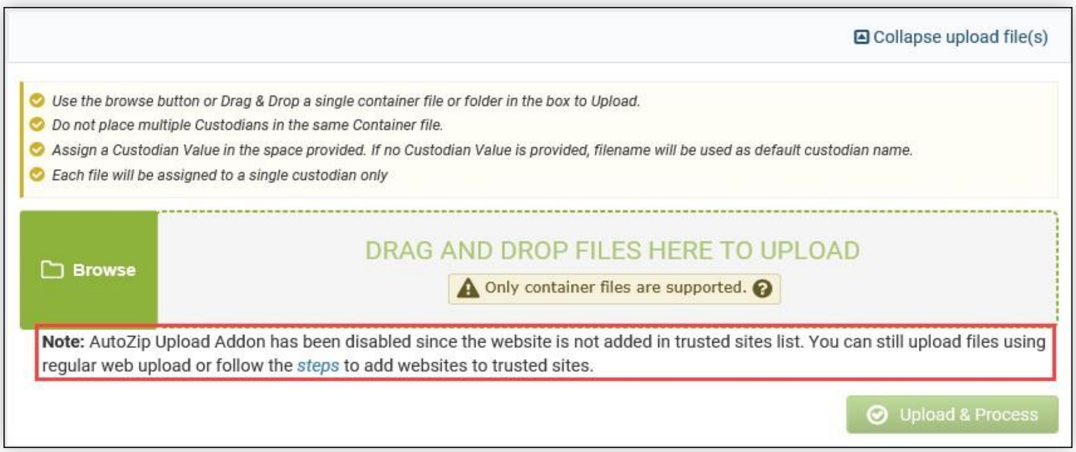
On the Upload screen, the View Project Setting link displays the Project Settings Report for the project.

Note: Project Settings Report is available only if:

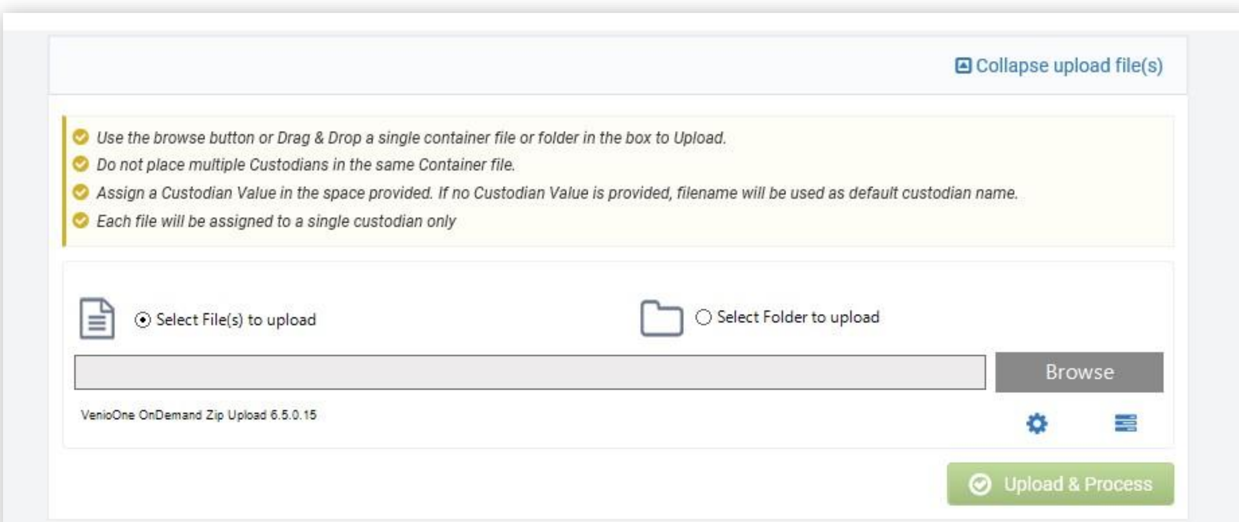
- Permission has been granted from Desktop Console > Project User Group > Reports > Allow to view Project Setting Report.
- The control setting key below must be set to 1 DISPLAY_PROJECT_SETTINGS_LINK_IN_UPLOAD_PAGE = 1.

5.8 ActiveX Uploader

In the Internet Explorer browser only, you may upload files using the ActiveX Uploader after installing the Venio Addons. With the ActiveX Uploader, you may upload files individually and are not restricted to uploading only container files. Before using the ActiveX Uploader, the VOD URL should be added as a Trusted Site in the Security tab under Internet Options. If not, the following message will be displayed:



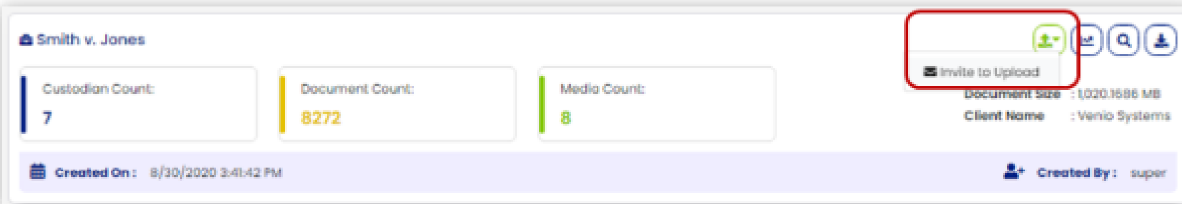
After installing ActiveX, the following screen is displayed.



5.9 Invite to Upload

You can also send invitations to other users to allow them to upload files using the Invite to Upload option.

Click the drop-down arrow on the Upload button and then click the Invite to Upload option as shown below.

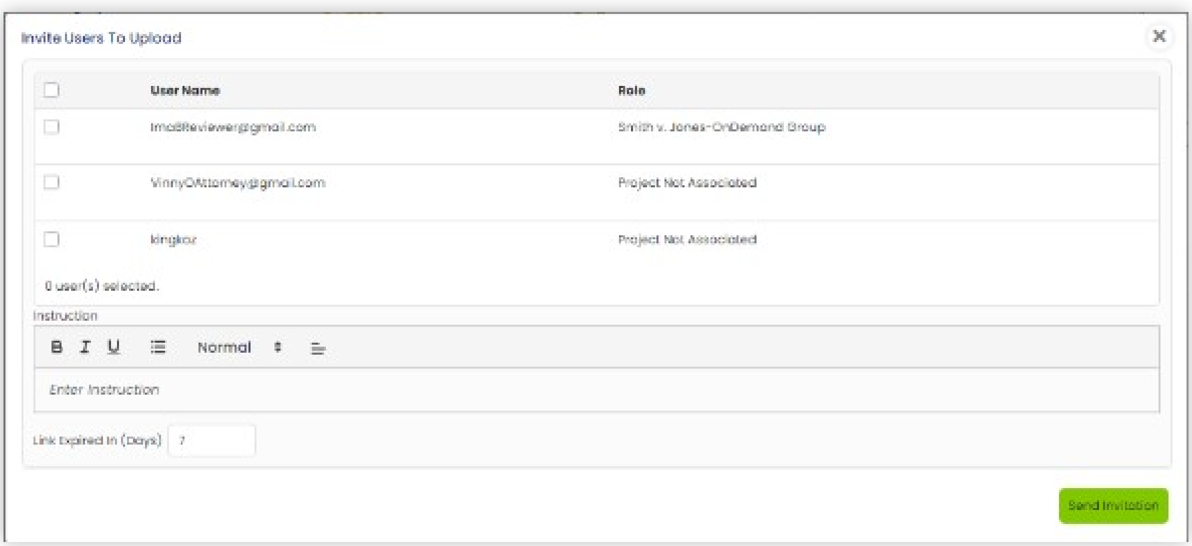


The Invite to Upload dialog displays.

Check to select internal users to be invited.
If needed, check the Invite External users to upload link and enter the email address(es) of the external user(s) to be invited.

NOTE: This feature must be enabled within your VenioOne database in order for this option to display. By default, external invites are not enabled.

Enter instruction notes to the user in the Instruction field.
The default Link Expired time is 7 days. Change as needed.
Click the Send Invitation button to send the invitation.



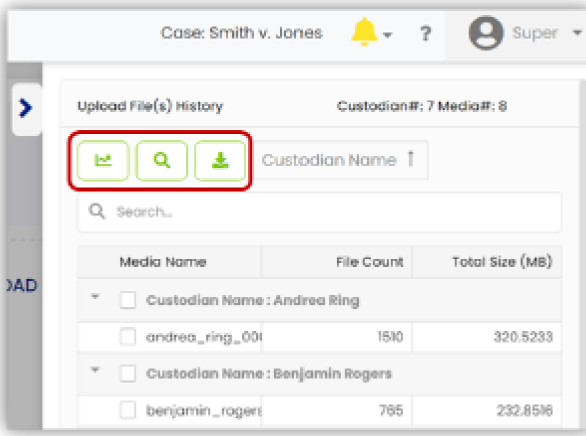
To Enable inviting external users to upload, change this setting:

[Key] ALLOW_EXTERNAL_USER_DATA_UPLOAD = 1?

select * from tbl_pj_ControlSetting where [Key] like '%external%'

5.10 Accessing Cases and Media

A panel on the upper right side of the screen can be expanded and used to view Custodians and Media in the case at any time. After expanding the Custodian/Media list, select the Custodian and Media and then use the green buttons to push that data to Analyze, Review, or Production. Custodians may be sorted in ascending or descending order using the adjacent button.



The Search bar may be used to locate Custodians/Media.

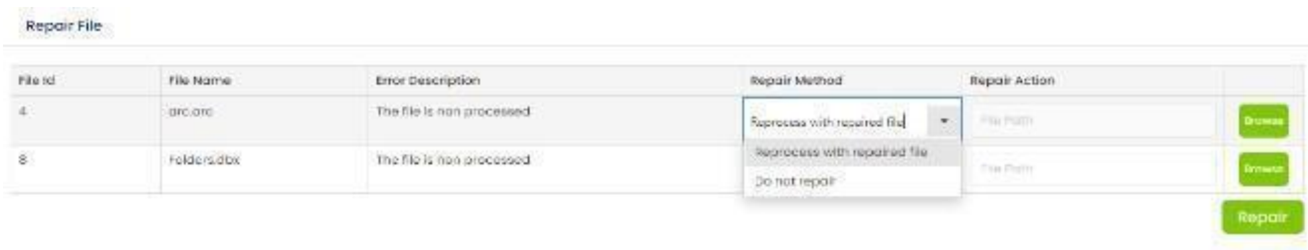
5.11 Unprocessed File Replacement

When a file cannot be processed, an in-app or email notification is sent to the user. Files with issues affecting their processing can be replaced with another file using the Repair File page in VOD, which can only be accessed by using an in-app notification link or email link.

NOTE: Additional error handling options are available within the VenioOne Desktop Console, so users may contact you as the VenioOne Administrator, if replacing the problematic file with a repaired file is not an option.

In-Application Notification   Email Notification

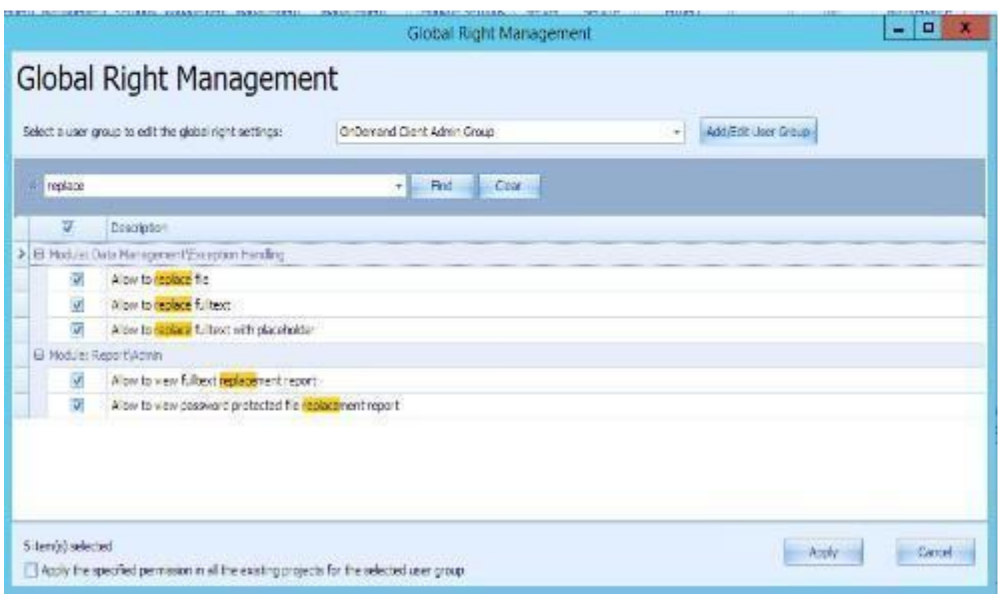
When you click the link in the email or in-app notification, the Repair File dialog will display.



You have two options for dealing with files that have not been processed:

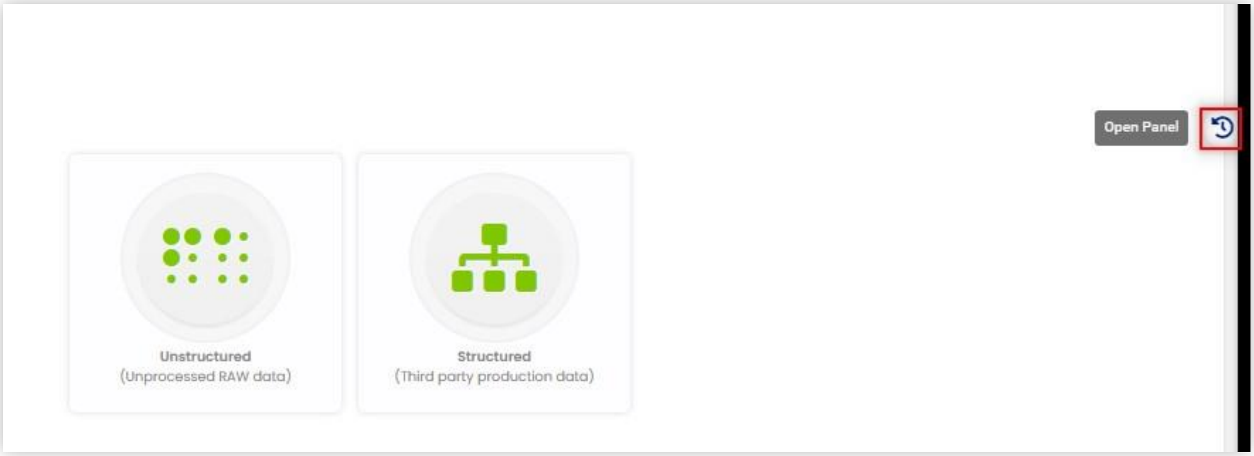
- Reprocess with a repaired file – Click the Browse button to select the repaired file from your local drive. Select file(s) and then click the Repair button to replace the file(s).
- Do not repair

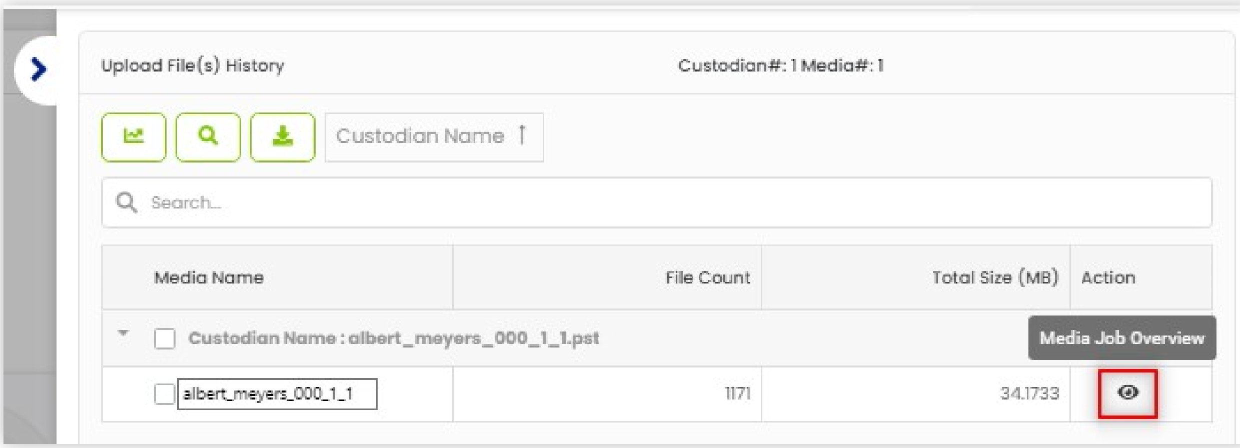
NOTE: To use these options, the user must have permission given within the Desktop Console to use this feature.



5.12 Upload History

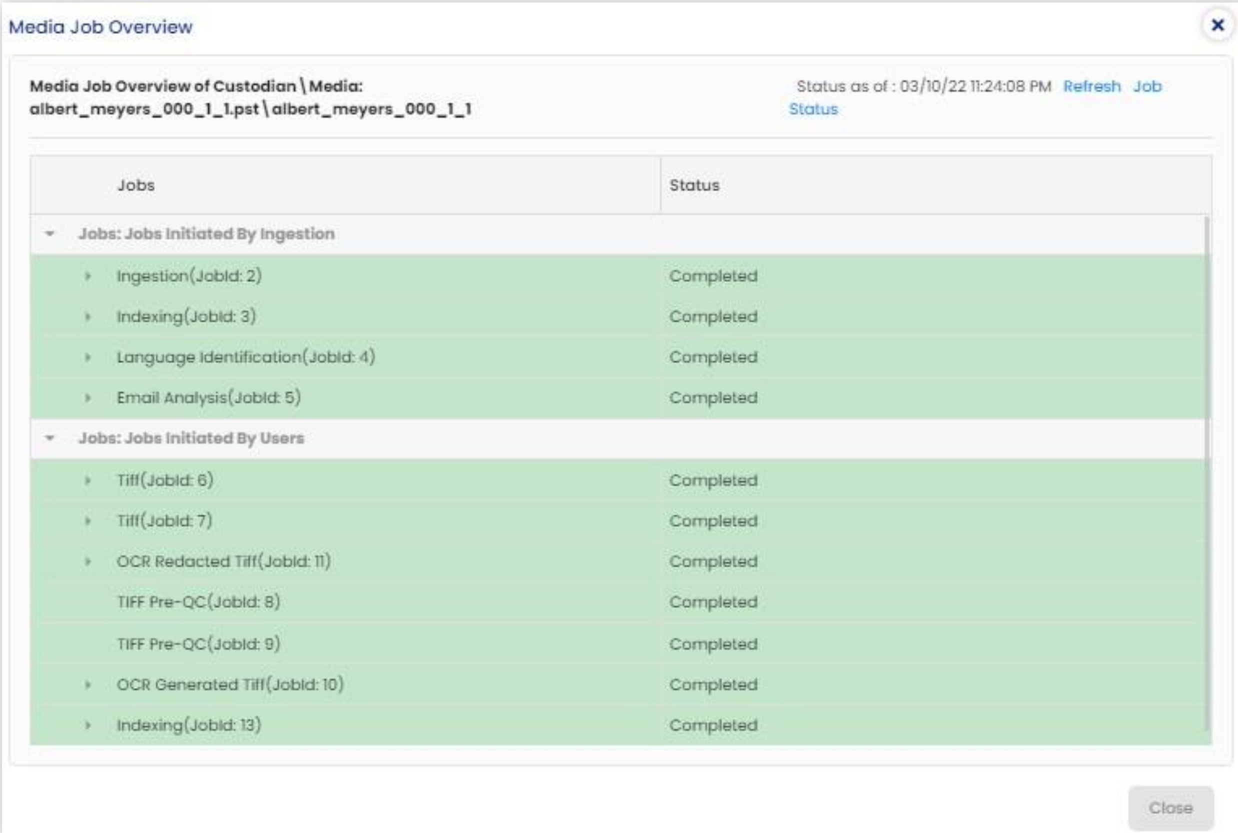
Navigate to Upload History using: Upload Page>Open Panel>Upload File(s) History





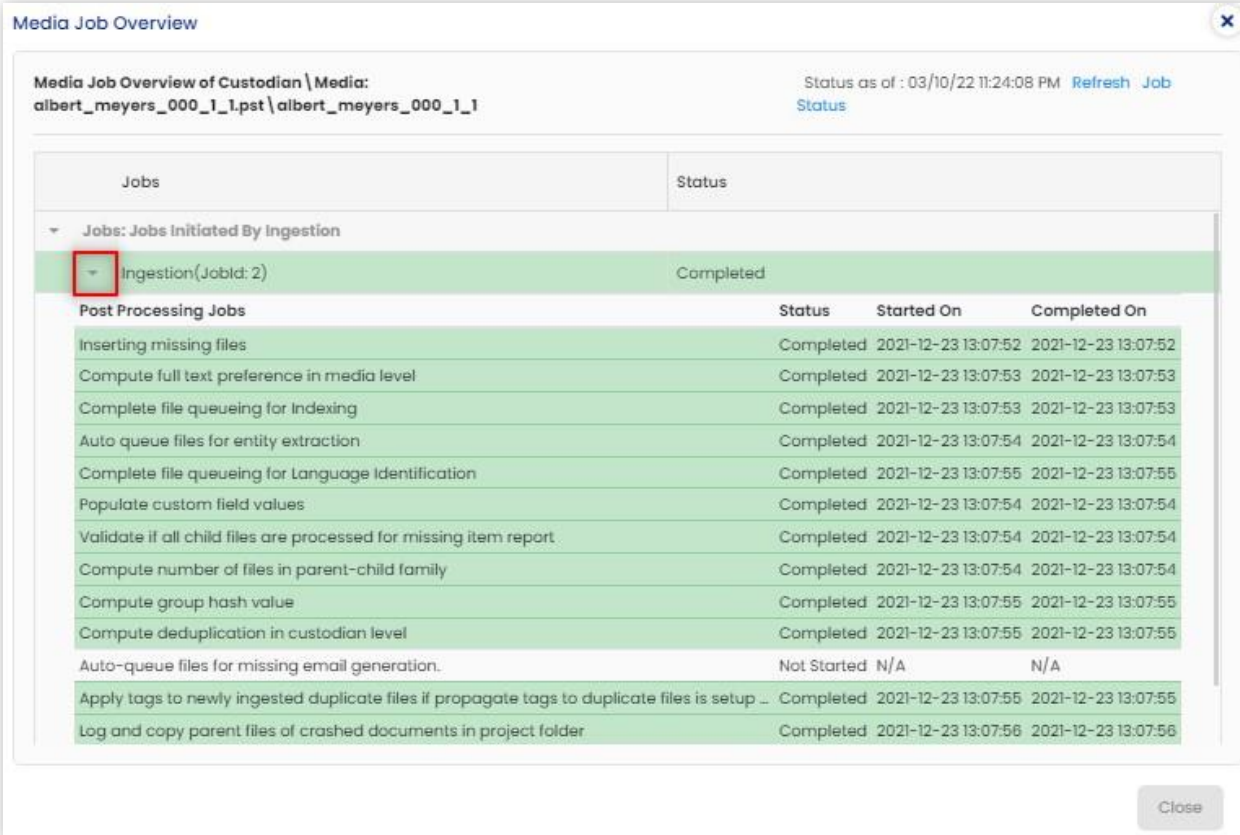
5.13 Media Job Overview

Under the Action column of the listed Media Name(s) click on the eye icon (Media Job Overview) to view the Processing and Post Processing Status.



Note: The jobs can be further drilled down by expanding the respective jobs.

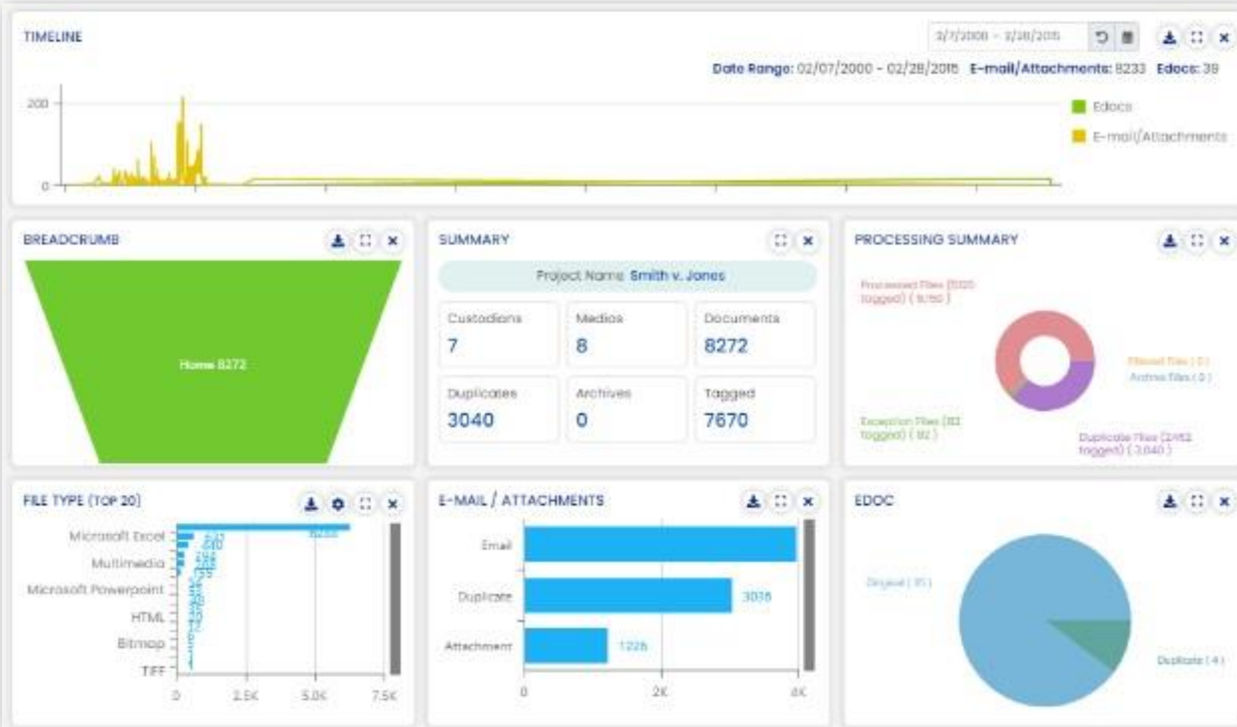
Venio



6 Analyze

The Analyze Dashboard provides information about the data in your project/case including document counts, file types, metadata, and other information. The page is made up of interactive widgets that may be used to review the data that has been uploaded, create searches, or do culling or tagging. Additionally, the layout may be customized, and multiple layouts may be saved for use across projects.

Venio



6.1 Analyze Dashboard Options

Buttons at the upper right of the Analyze Dashboard may be used to:

 Tag and Untag items selected within the widgets

 Add a Widget to the Analyze Dashboard

 Send data to the Review Dashboard or Production

 After selecting data within the widgets, Apply Inclusive or Exclusive Filters

6.1.1 Send to Review

At any time, you may send documents for review. Click the Send to Review button ( ) on the control bar to send all the documents for review. Refer to section Error! Reference source not found. for more information on the Review module.

6.1.2 Send to Production

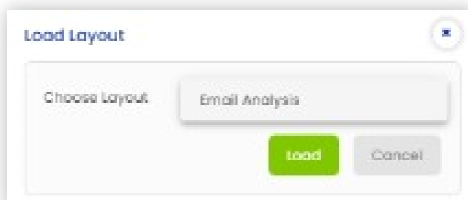
At any time, you may also send documents for production. Click the Send to Production button (
) on the control bar to send all the documents for production. For more information on the production/export process, refer to section 9 below, which covers the Production module.

6.1.3 Save and Load Analyze Layouts

You may save different layouts of Widgets within the Analyze Dashboard. For example, you may wish to save an Email Analysis Layout with tools for analyzing emails. Simply arrange the widgets to your liking and then use the Save Analyze Layout button (shown below).

Load Analyze Layout / Save Analyze Layout

When saving a layout, you will be asked to name it. To load a saved layout, click the Load Analyze Layout button, pick your layout from the drop-down list, and click the Load button.



6.2 Widgets

6.2.1 Using Widgets

IMPORTANT: Updating one widget updates the entire Analyze Dashboard.

- Resize a widget by clicking and dragging the edges.
- Maximize a widget using the Maximize button ( ) in the upper right corner of the widget.
- Widgets with the Edit option button ( ) in the top right corner may be set to show the Top 10, 20, 50 or 100 items or All items, and displayed in a Bar, Pie, or Table view.
- Within widgets, items may be selected to filter the scope of the entire Analyze Dashboard. After selecting an item within the widget, use the inclusive and exclusive filter buttons ( ) in the upper right corner to filter the data.
- Use the Export button ( ) to save the information contained within the widget. Depending on the widget, you will have options to either save it as either an image or Excel/CSV file.

- Remove a widget by clicking the Close button (×).

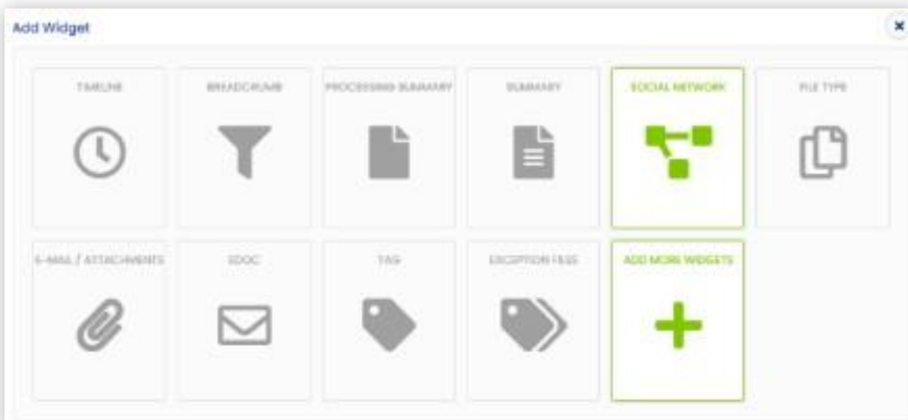
6.2.2 Add/Remove Widgets

Click the Add Widget button (+) to add a new widget to the Analyze Dashboard.

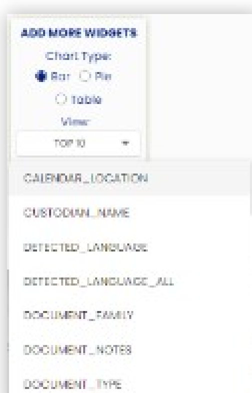
*The Add Widget dialog displays. The Add Widget dialog lists various common widgets, such as the Timeline, Processing Summary, Summary, Social Network, FileType, E-mail Attachments, EDOC, Tag, and Exception
Files.*

Click to select the widget you want to add and its options.

The widget will be added to the dashboard. If the selected widget is already displayed, a message displays indicating the widget is already in the dashboard.



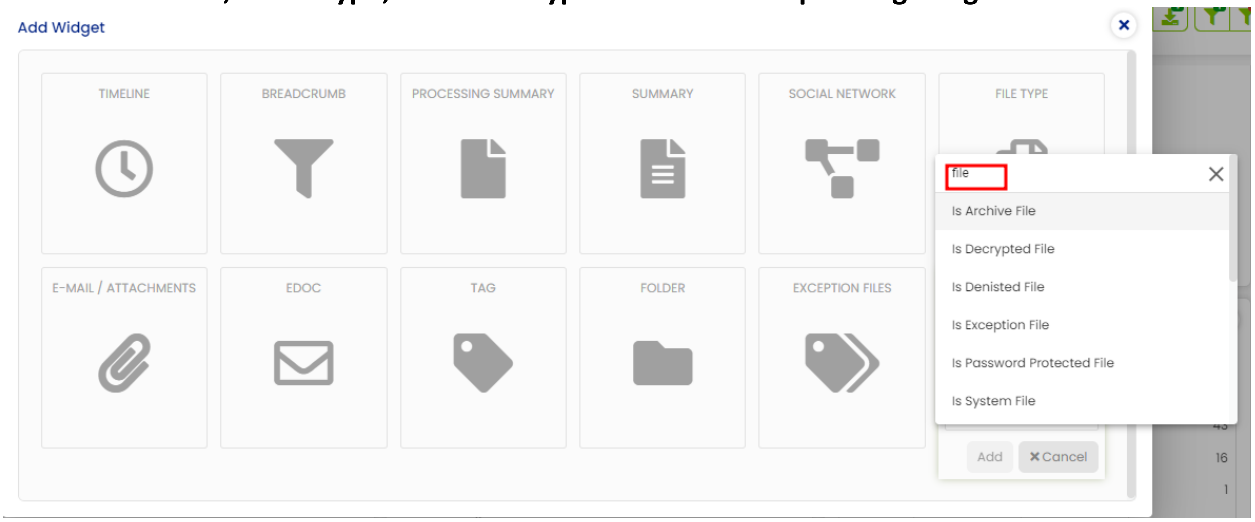
To add additional widgets that are not listed, click the Add More Widgets button. Choose the Chart Type, View Type, and the Field to add a corresponding widget.



To remove a widget, simply click the Delete button (X) to remove it from the dashboard.

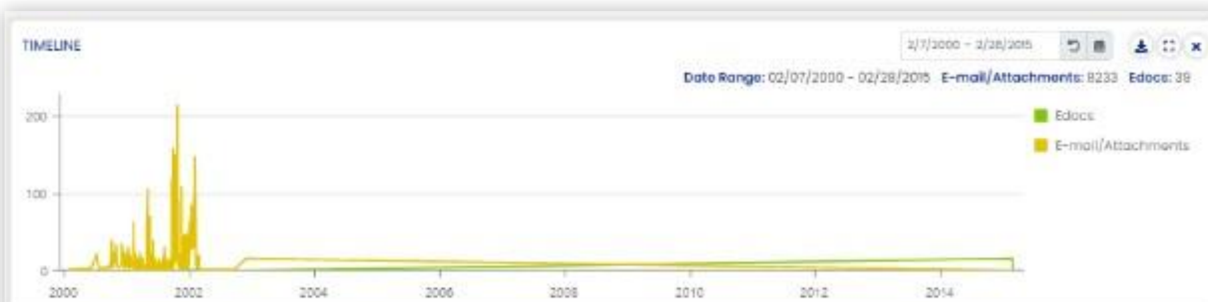
To add additional widgets that are not listed, click the Add More Widgets button.

Type in the Fieldname, matching field names will be searched and listed. Choose the Field, Chart Type, and View Type to add a corresponding widget.

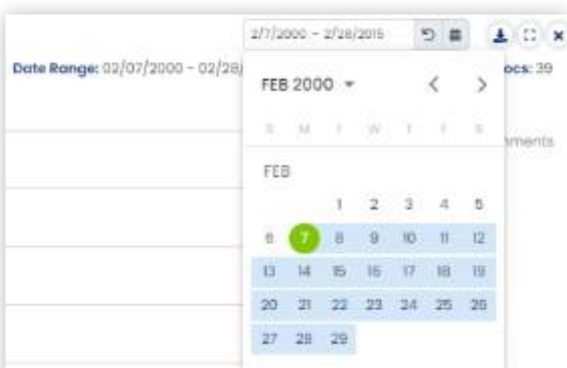


6.2.3 TimeLine Widget

The Timeline widget shows the number of documents per Year, Month, Week, or Day.



The filters in the top right allow you to set the date range. The date range is set using the dropdown calendar in the Start Range and End Range fields.

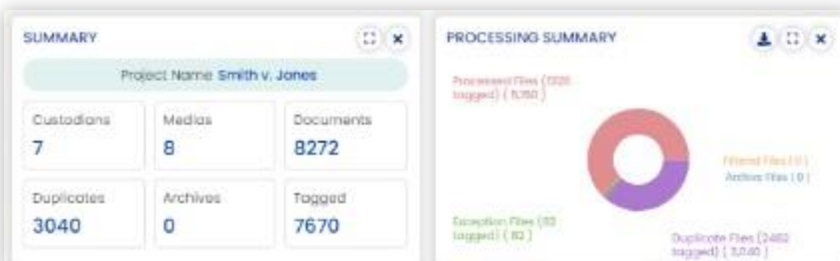


6.2.4 Breadcrumb Funnel Widget

The Breadcrumb Funnel widget shows the total document count.

6.2.5 Summary and Processing Summary Widgets

The Summary and Processing Summary widgets give you the breakdown of processed files, duplicate files, and exception files.



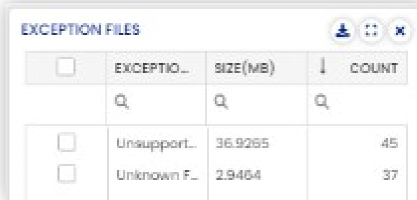
6.2.6 File Type Widget

The File Type widget shows the document counts for each file type. This will give you an idea of what kinds of files are in your data.

6.2.7 Exception Files Widget

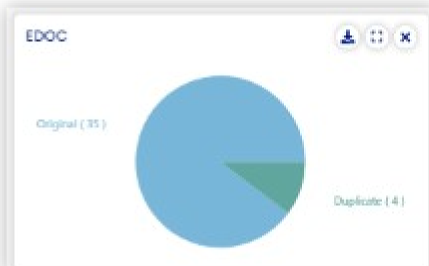
During processing, if there are files that can neither be accessed nor processed, they will be shown in the Exception Files widget with the file size and count listed.

Venio



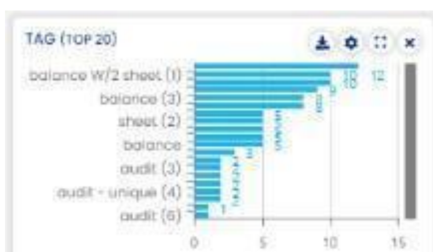
6.2.8 EDOC Widget

The EDOC widget shows the statistics related to documents only. You will also be able to see the number of duplicates, if they exist, within the project.



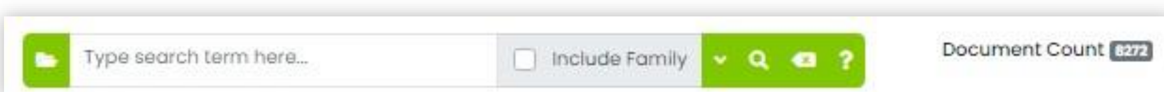
6.2.9 Tag Widget

The Tag widget shows the document counts for the top 20 tags in your project. Use the Edit option button ( ) to change the number of items displayed.



6.3 Analyze Dashboard Searching

At the top of the Analyze Dashboard is a search bar.



The following options are available (from left to right):

Custodian/Media Selection	Displays a list of Media and Custodians from which you may select

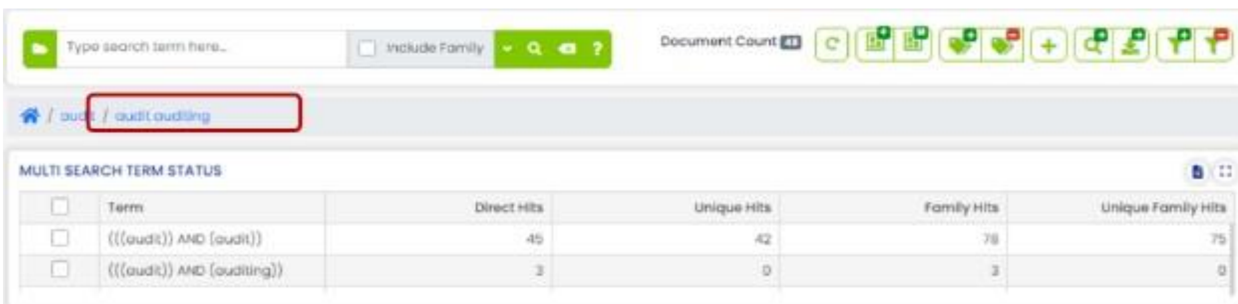
Search Field	Enter your search terms in this field
Include Family checkbox	Determines whether family documents will be included in the results
Expand Search Field	If you need additional space to enter search terms, use this option
Execute Search	Clicking this button will execute your search
Clear Search Input	Clicking this button will clear the Search Field
Search Term Help	Use this button to display information on composing searches

Document Count	Displays the number of documents within the search results

6.3.1 Multiple Term Searches

You can do single term or multiple term searches in VOD. For multiple term searches, type the term(s) on separate lines in the search field. Click the Expand button ( ) to expand the search field where you can enter more than one term. When you click the Search button ( ), the search results are updated within the Analyze Dashboard.

Also, an interactive breadcrumb trail is added below the Search field and the results of the search are displayed in a Multi Search Term Status widget as shown below.

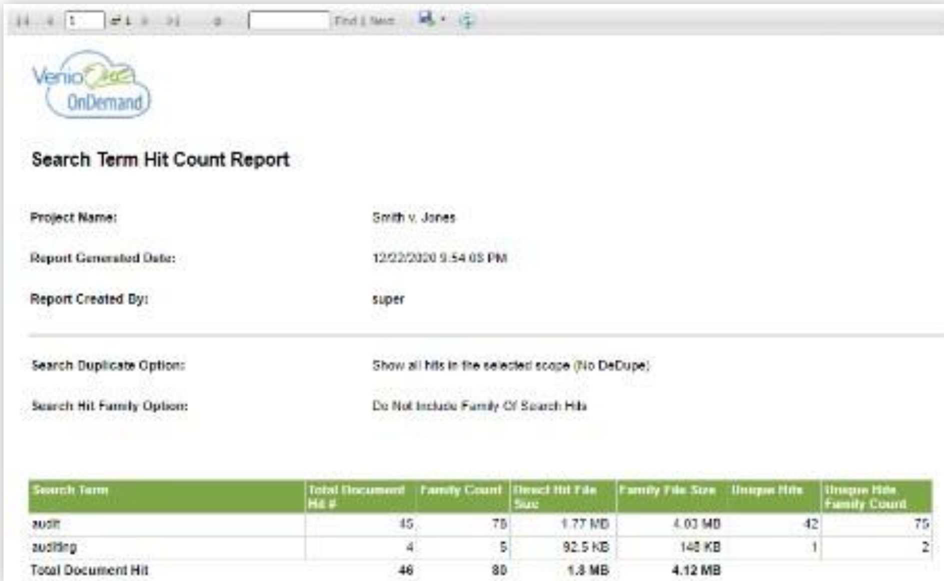


)

To filter the display, select the search term checkbox(es) and click the Inclusive Filter button (to apply filtering changes within the widgets of the Analyze Dashboard

6.3.2 Search Term Hit Report

Click the Report button ( ) at the top right corner of the Multi Search Term Status widget to view the Search Term Hit Count Report (shown below).



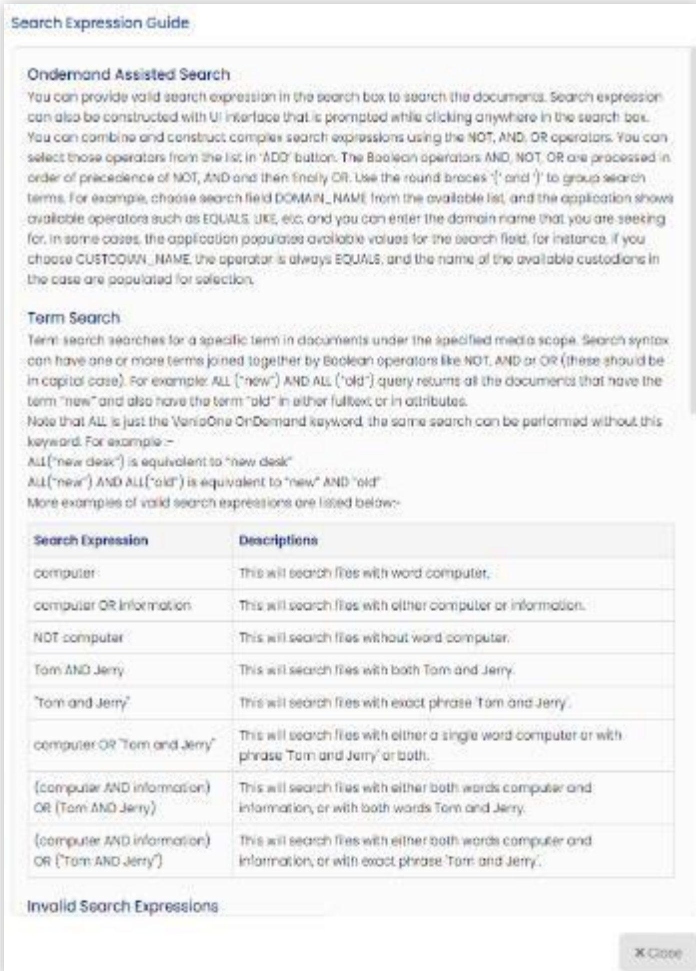
Search Term Hit Count Report

Project Name:	Smith v. Jones
Report Generated Date:	12/22/2020 9:54:05 PM
Report Created By:	super
Search Duplicate Option:	Show all hits in the selected scope (No DeDupe)
Search Hit Family Option:	Do Not Include Family Of Search Hits

Search Term	Total Document Hit #	Family Count	Direct Hit File Size	Family File Size	Unique Hits	Unique Hits Family Count
audit	45	75	1.77 MB	4.03 MB	42	75
auditing	4	5	92.5 KB	148 KB	1	2
Total Document Hit	46	80	1.8 MB	4.12 MB		

6.3.3 Search Guide

If you need assistance in formulating your search, click the Help button (?) to display the Search Expression Guide (shown below).



Search Expression Guide

Ondemand Assisted Search

You can provide valid search expression in the search box to search the documents. Search expression can also be constructed with UI interface that is prompted while clicking anywhere in the search box. You can combine and construct complex search expressions using the NOT, AND, OR operators. You can select those operators from the list in 'ADD' button. The Boolean operators AND, NOT, OR are processed in order of precedence of NOT, AND and then finally OR. Use the round braces '(' and ')' to group search terms. For example, choose search field DOMAIN_NAME from the available list, and the application shows available operators such as EQUALS, LIKE, etc. and you can enter the domain name that you are seeking for. In some cases, the application populates available values for the search field, for instance, if you choose CUSTODIAN_NAME, the operator is always EQUALS, and the name of the available custodians in the case are populated for selection.

Term Search

Term search searches for a specific term in documents under the specified media scope. Search syntax can have one or more terms joined together by Boolean operators like NOT, AND or OR (these should be in capital case). For example: ALL ("new") AND ALL ("old") query returns all the documents that have the term "new" and also have the term "old" in either fulltext or in attributes.
Note that ALL is just the VenioOne OnDemand keyword, the same search can be performed without this keyword. For example :-
ALL("new desk") is equivalent to "new desk"
ALL("new") AND ALL("old") is equivalent to "new" AND "old"
More examples of valid search expressions are listed below:-

Search Expression	Descriptions
computer	This will search files with word computer.
computer OR information	This will search files with either computer or information.
NOT computer	This will search files without word computer.
Tom AND Jerry	This will search files with both Tom and Jerry.
"Tom and Jerry"	This will search files with exact phrase 'Tom and Jerry'.
computer OR "Tom and Jerry"	This will search files with either a single word computer or with phrase 'Tom and Jerry' or both.
(computer AND information) OR (Tom AND Jerry)	This will search files with either both words computer and information, or with both words Tom and Jerry.
(computer AND information) OR ("Tom AND Jerry")	This will search files with either both words computer and information, or with exact phrase 'Tom and Jerry'.

Invalid Search Expressions

✖ Close

6.4 Filtering

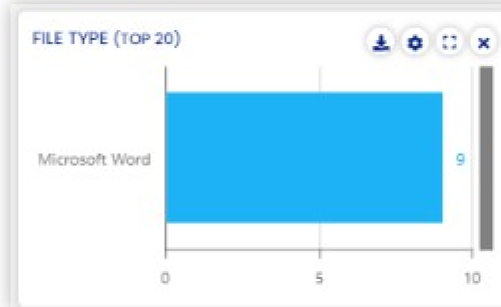
You can apply Inclusive or Exclusive Filters in a single widget or multiple widgets.

6.4.1 Filtering a Single Widget

To filter a single widget, use the Inclusive/Exclusive Filter buttons in the top right corner of the widget.

Click to select the item(s) within the widget that you wish to filter.

Either click the Inclusive Filter button () for inclusive filtering or the Exclusive Filter button () to apply an exclusive filter.



With content selected for filtering

After filtering is applied

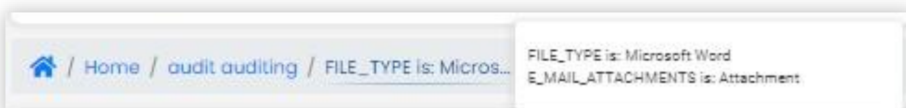
The filter is applied. The breadcrumb list is updated and the widgets within the Analyze Dashboard are immediately updated.

6.4.2 Filtering Multiple Widgets

To filter multiple widgets at one time, select items within the widgets and then use the Inclusive Filter ( ) and Exclusive Filter ( ) buttons on the control bar of the Analyze Dashboard.

Inclusive Filter

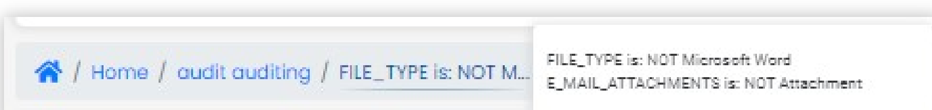
Use the Inclusive Filter button ( ) for inclusive filtering. For example, select the Microsoft Word bar from the FILE TYPE widget and Attachment from the EMAIL/ATTACHMENTS widget. Then, apply the inclusive filter using the Inclusive Filter button.



When hovering over the breadcrumb list, both filters are displayed.

Exclusive Filter

Use the Exclusive Filter button for exclusive filtering. For example, select the Microsoft Word bar from the FILE TYPE widget and Attachment from the E-MAIL/ATTACHMENTS widget. Then, apply the exclusive filter using the Exclusive Filter button.



When hovering over the breadcrumb list, both NOT filters are displayed.

7 Tagging

Tagging may be done from either the Analyze Dashboard or the Review Dashboard of VOD. Tagging may be administered from those locations or the Case Admin Settings if you have rights to do so.

7.1 Bulk Tag/Untag

Bulk tagging is done from the Analyze Dashboard.

Click the Bulk Tag button ( ) on the control bar of the Analyze Dashboard.

The Tag Documents dialog will display a list of tags.

Select tag(s) to apply to all the documents.
Scroll to the bottom of the Tag Documents dialog and click the Tag button.

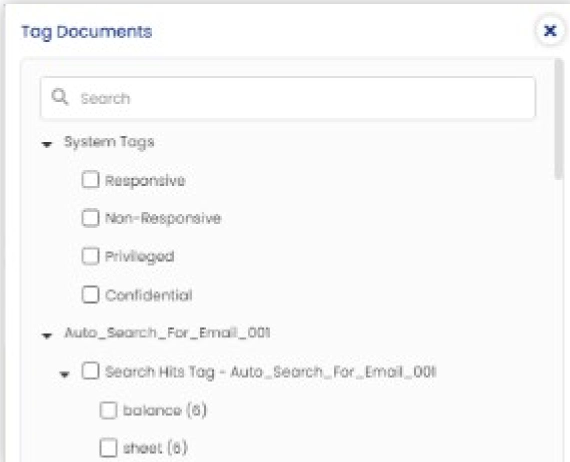
NOTE: Use the Bulk Untag button ( ) in the same way to untag all of the documents.

7.2 New Tag

7.2.1 Create New Tag from Analyze Dashboard

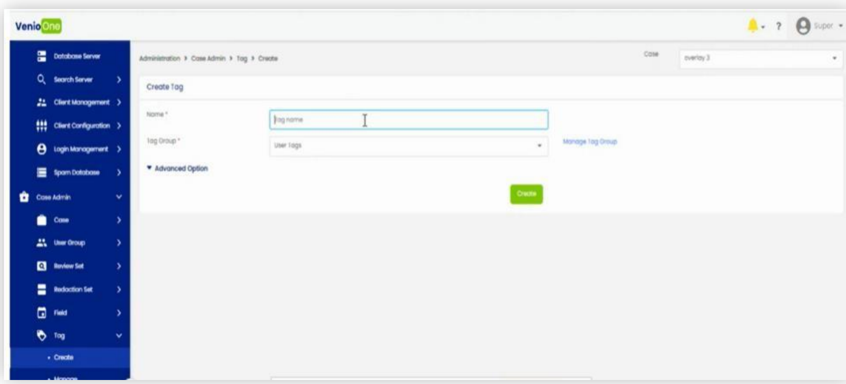
Click the Bulk Tag button on the Control bar of the Analyze Dashboard.

The Tag Documents dialog displays.



Scroll to the bottom of the dialog and click the Create Tag button.

The Create New Tag dialog displays.

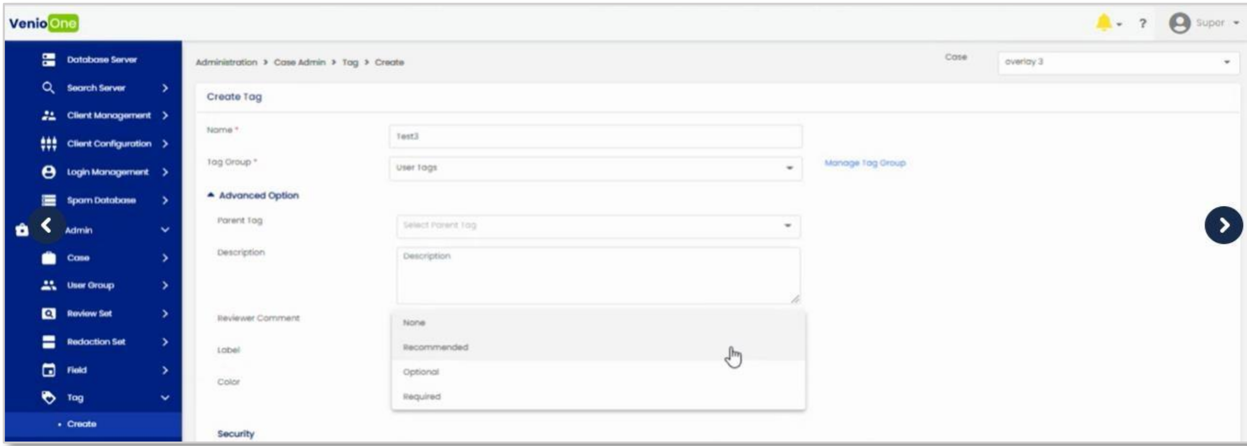


Enter a Name for the tag.
Select the Tag Group using the drop-down list or click the Manage Tag Group link to create one.
Click Advanced Option
Select the parent tag from the Parent Tag drop-down list.

> NOTE: If the tag being created is a top level tag, then the Parent Tag drop-down will be left to display Select Parent Tag.

Enter a Description if you would like to have one.
Under Reviewer Comment, select from the following options from the drop-down menu:

- Recommended: User may want to enter comments in the field for the selected tag.
- Optional: Users can skip entering the comment for the selected tag.
- Required: User must enter a comment for the selected tag before updating.

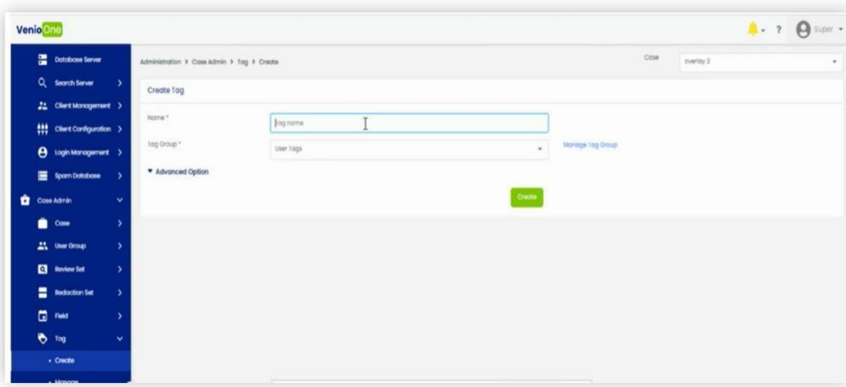


Enter a reason in the Label field.
Select a Color for the tag.
To secure the tag for specific groups, click the Advanced Options link.
Click the Create button.

7.2.2 Create New Tag from the Review Dashboard

Click the New Tag button in the Tags panel of the Review Dashboard.

The Create New Tag dialog displays.



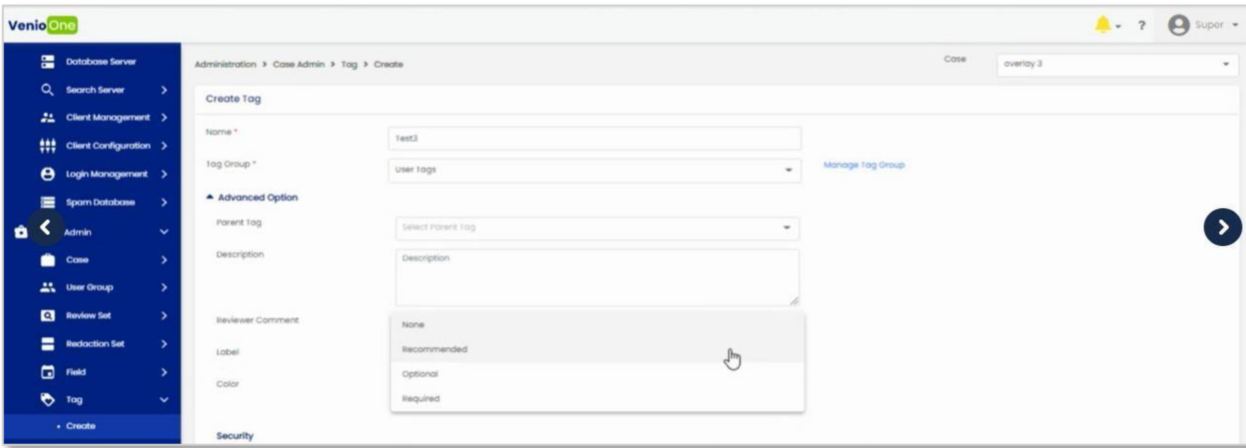
Enter a Name for the tag.
Select the Tag Group using the drop-down list or click the Manage Tag Group link to create one.
Select the parent tag from the Parent Tag drop-down list.

NOTE: If the tag being created is a top level tag, then the Parent Tag drop-down will be left to display Select Parent Tag.

Enter a Description if you would like to have one.

Under Reviewer Comment, select from the following options from the drop-down menu:

- Recommended: User may want to enter comments in the field for the selected tag.
- Optional: Users can skip entering the comment for the selected tag.
- Required: User must enter a comment for the selected tag before updating



Enter a reason in the Label field.

Select a Color for the tag.
To secure the tag for specific groups, click the Advanced Options link.
Click the Create button.

7.3 Create a Tag Group

You can create two types of Tag Groups: *Non-Exclusive* and *Exclusive*. In a Non-Exclusive tag group, multiple tags from the same tag group can be applied to the same file - for example, a list of issue tags. However, in an Exclusive tag group, only one of the tags in the tag group can be applied to a file - for example, *Responsive* or *Non-Responsive* tags.

From within the Create New Tag dialog, click the Manage Tag Group link.

The Tag Group dialog displays.

In the Tag Group dialog, enter a Name for the tag group.
Check the Apply exclusive tag check box if you intend to create an exclusive tag group. Click the Add button. Close the dialog(s).

7.4 Tag Propagation

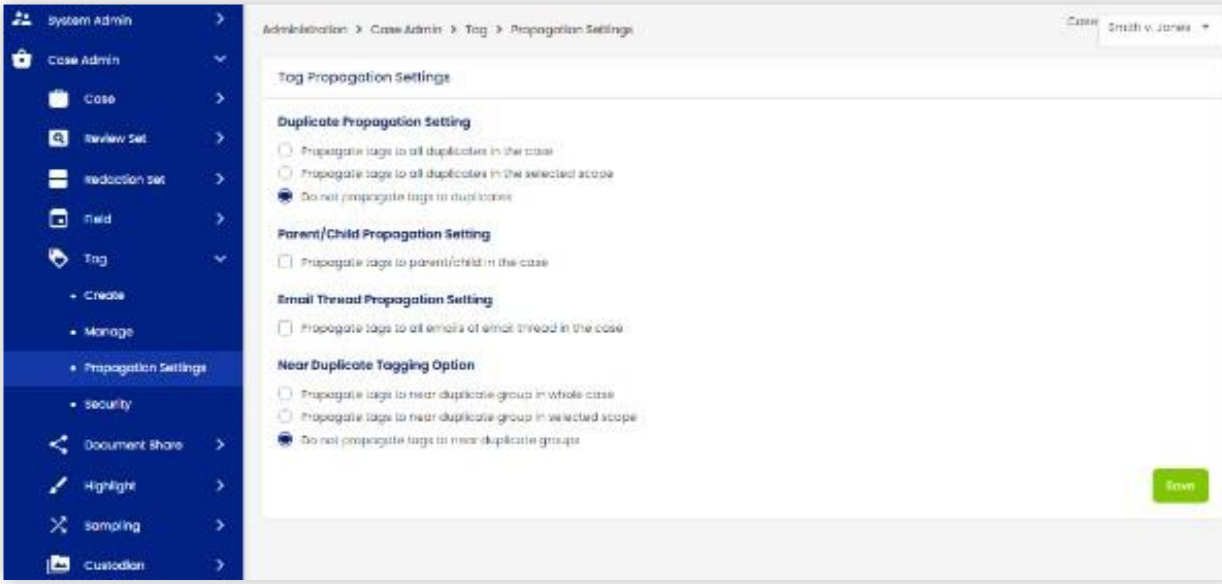
If you have rights to do so, you may set additional tagging options for Tag Propagation within the Case Admin settings.

Click the drop-down arrow next to your name in the upper right corner and select Admin Settings.
Click the Case Admin link to expand the Case Admin settings.
Click the Tag link to expand the Tag settings.
Click the Propagation Settings link to display the propagation options.

The Tag Propagation Settings are shown.

Set the Tag Propagation Settings using the radio buttons and check boxes.
NOTE: Details on the options are in the sections below.

Click the Save button to save your settings.



7.4.1 Duplicate Tagging Options

Select one of the three options for how to handle duplicate tagging. The options are:

- Propagate tags to all duplicates in the case: Tag all duplicate documents within the case.
- Propagate tags to all duplicates in the selected scope: Tag duplicate documents within the selected scope.
- Do not propagate tags to duplicates: Do not tag duplicate documents.

7.4.2 Parent/Child Set Tagging Options

Choose whether to propagate tags within families of documents. Checking Propagate tags to parent/child in the case will tag both parent and child documents.

7.4.3 Email Thread Tagging Options

Choose whether to propagate tags within email threads. Checking Propagate tags to all emails of email thread in the case will tag all emails within a thread.

7.4.4 Near Duplicate Tagging Options

Choose how to propagate tags to near duplicate documents. The options are:

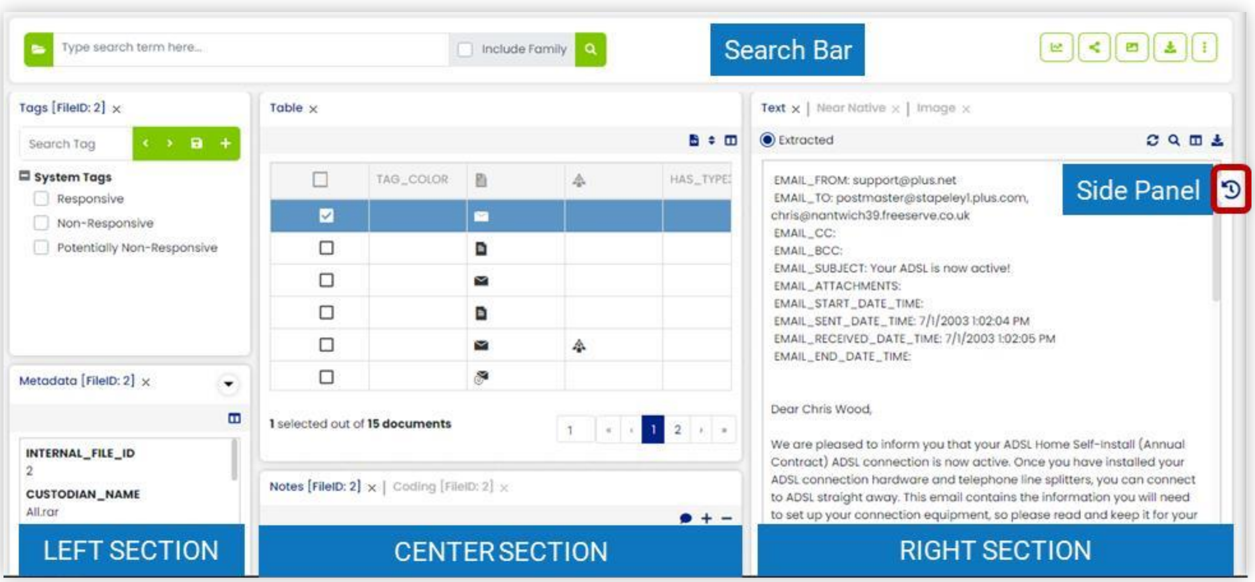
- Propagate tags to near duplicate group in whole case: Tag all near duplicate documents within the case.

- Propagate tags to near duplicate group in the selected scope: Tag near duplicate documents within the selected scope.
- Do not propagate tags to near duplicate groups: Do not tag near duplicate documents.

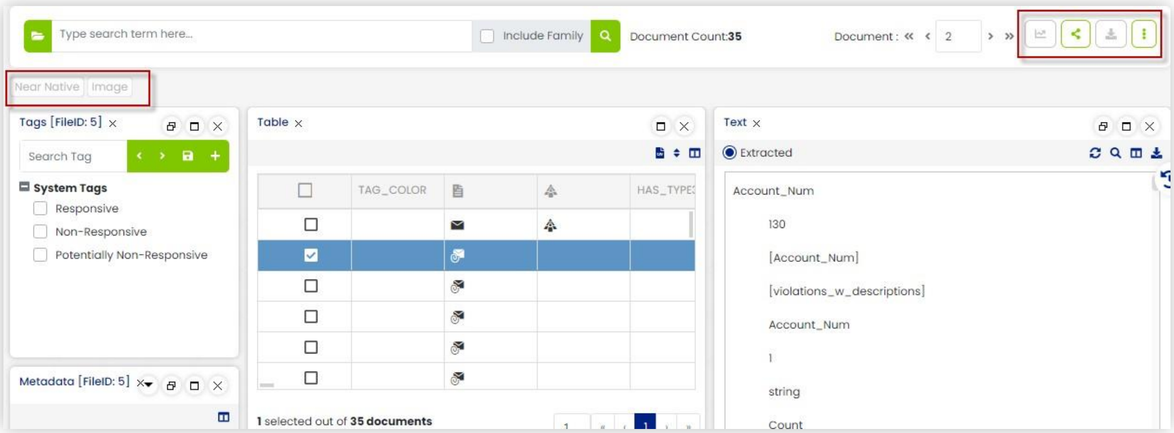
8 Review Dashboard

The Review Dashboard is where search results or documents to be reviewed are displayed. It is divided into three sections containing various panels, as well as a Search Bar at the top of the screen and a pop-up panel on the right side of the screen that displays Saved Searches, the Search History, and Dynamic Folders.

- Each panel can be resized or dragged to move the panel.
- Column displays and sort order may be adjusted within some of the panels.
- Panels may be popped out to place on another monitor for ease of reviewing documents.
- After adjusting the display, you may wish to save the layout. You may save multiple Review Dashboard layouts according to your needs.



NOTE: In the Review Dashboard for TOA projects, only the *Text View* will be available. As shown below, the other view tabs will be grayed out. Also, some options on the Search Bar, such as *Send to Analyze* and *Send to Production* will be grayed out as well.

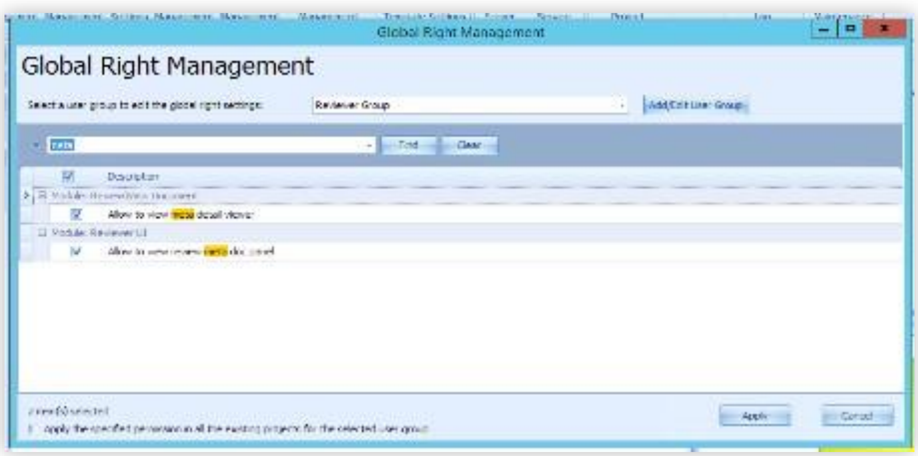


8.1 Review Dashboard Admin

There are settings that should be enabled to the user by the OnDemand Admin in order for various panels to be available and to control which fields are visible within each panel.

8.1.1 Access to Panels

Access to the panels can be configured within the Desktop Console under Global Rights Management. Select the group first. Then, enter the name of the panel in the Find field to locate those specific rights. Use the check boxes to set the group's access rights and then click the Apply button to save the changes.



8.1.2 Access to Fields within Panels

To control which fields are displayed to a particular user group, follow the steps below.

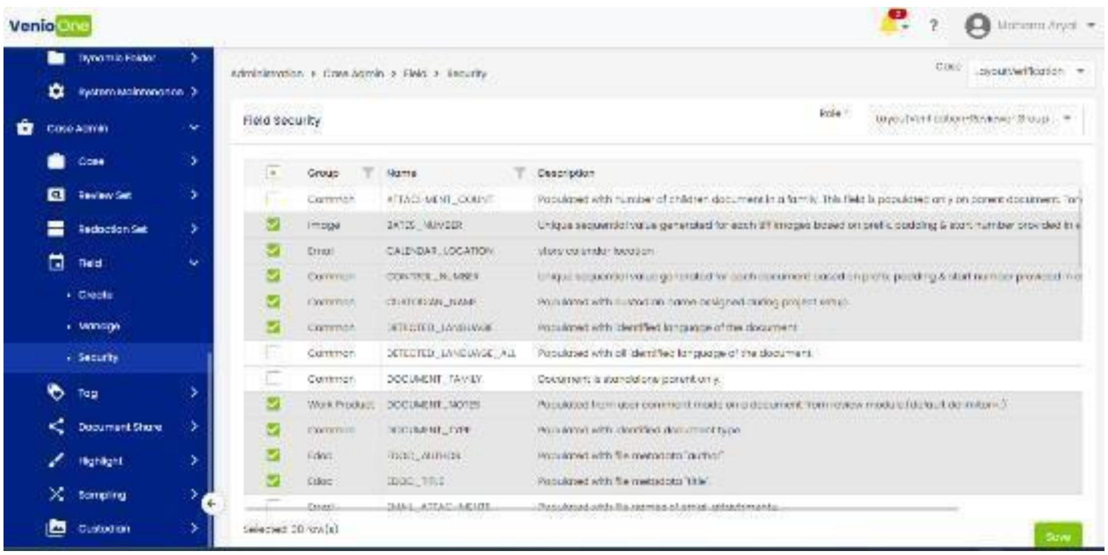
Within VOD, click the arrow next to your name (in the upper right corner) and select Admin Settings.

2. Under Case Admin, click the arrow to expand Field.
3. Click Security.

The Field Security dialog displays.

Select the project from the Case drop-down menu (upper right corner).

7. Select the group Role from the drop-down menu (upper right corner).
8. Use the check boxes to select the fields to be displayed within the panel.
7. Click the Save button (bottom right corner).



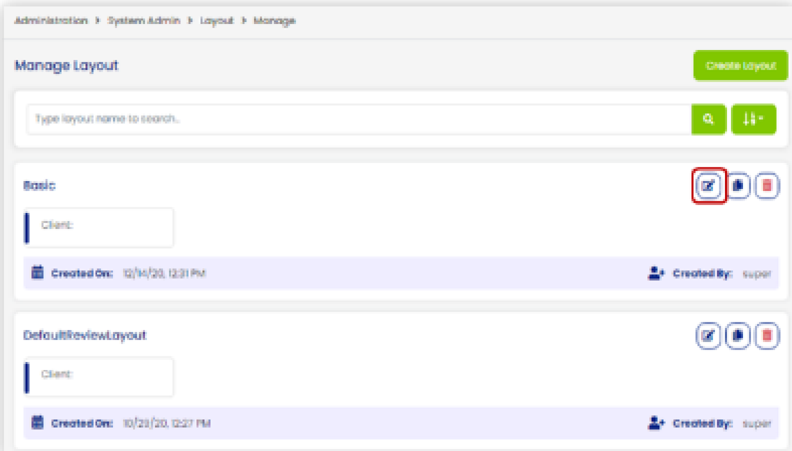
8.1.3 Field Display Order within Panels

The layout in which fields are displayed within panels is done within the Layout Management section of System Admin in VOD. To control which fields are displayed within a particular panel, follow the steps below.

Within VOD, click the arrow next to your name (in the upper right corner) and select Admin Settings.

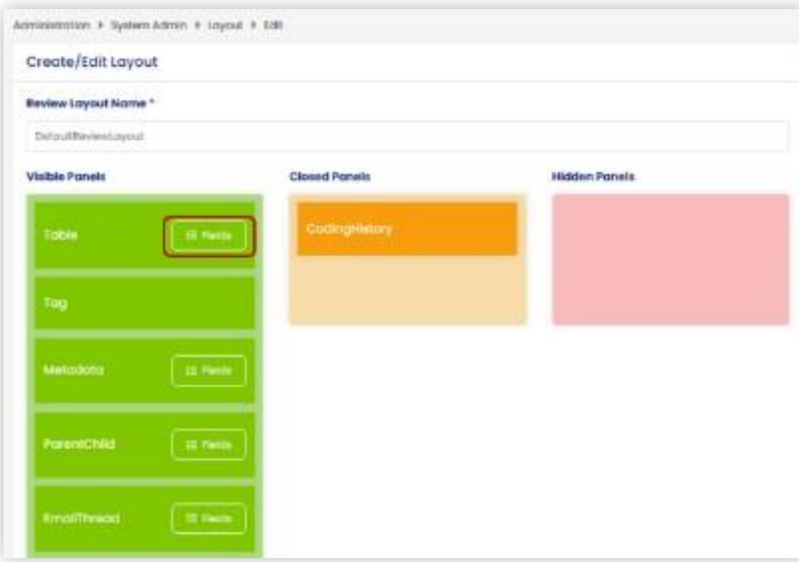
2. Under System Admin, click the arrow to expand Layout.
3. Click Manage.

The Manage Layout dialog displays a list of layouts.



Click the Edit button for the layout you wish to change.

The Create/Edit Layout dialog displays a list of Visible, Closed, and Hidden Panels within the Layout.



7. Click the Fields button for the panel to be edited.

   *The Fields-*Panel Name *dialog displays Available and Visible Fields. Restricted fields do not appear.*

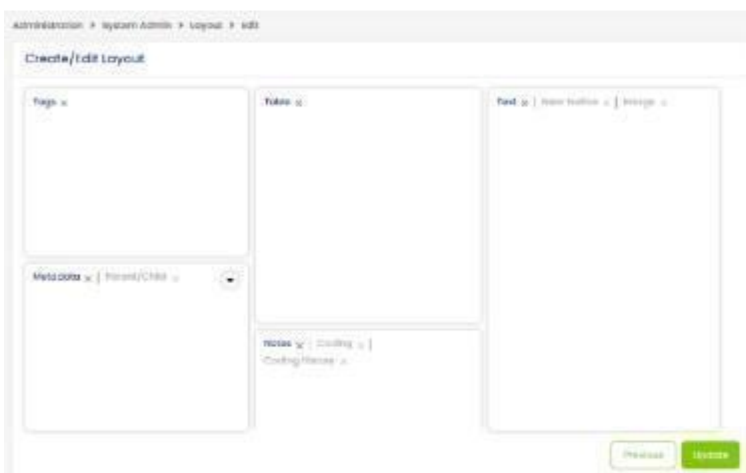
8. Click-and-drag a field from the Available Fields column to the Visible Fields location for it to be displayed within the panel.

7. Click the Save button (bottom right corner).

You are returned to the Create/Edit Layout dialog.

Click the Continue button (bottom right).

The Create/Edit Layout panel layout dialog displays. This screen is used to adjust the location and size of panels.



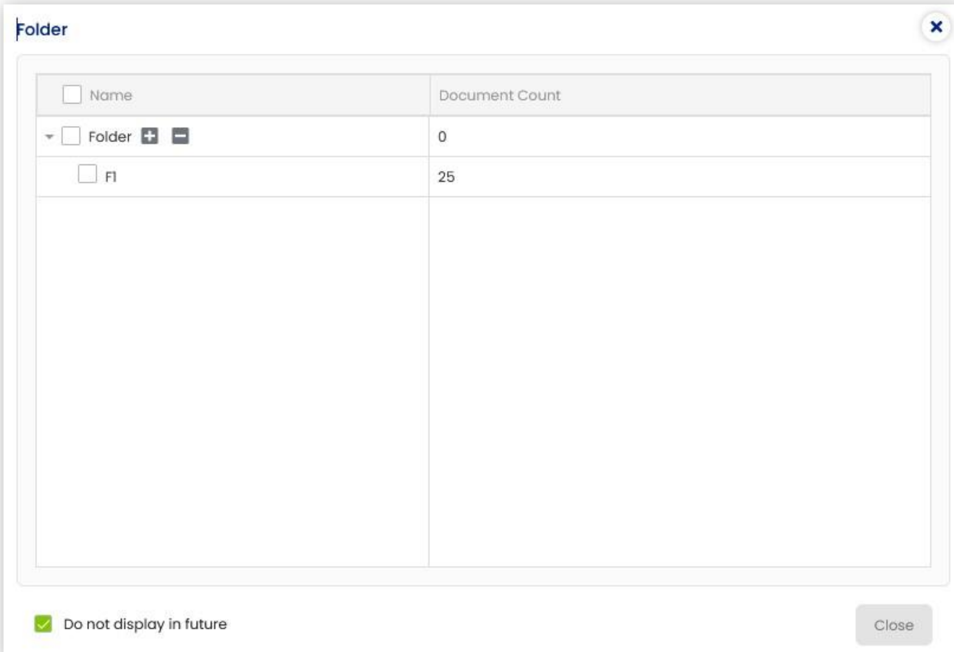
Click the Update button.

8.1.4 Restricted Access

As a project administrator, you may restrict user access to only certain Custodian(s)/Media or Folders within the case. If so, they will only see files related to those items where rights have been granted within VOD. Information on how to set up these restrictions is contained in Section 12.24 below.

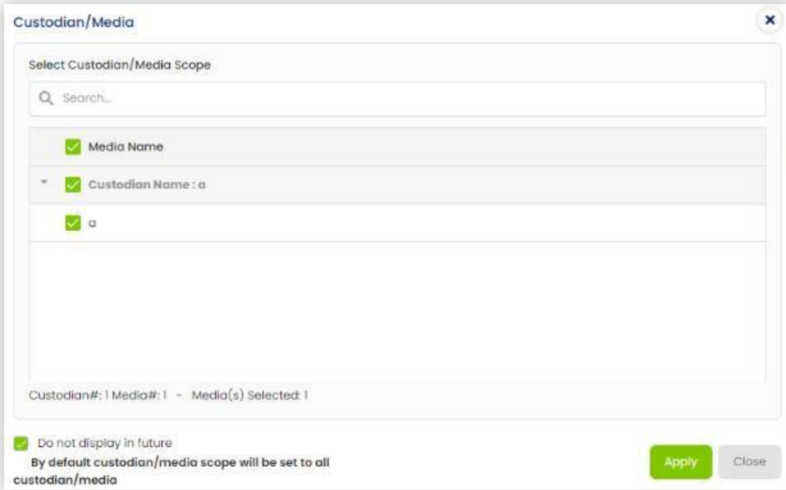
8.1.4.1 Restricted Access by Folder

If users are restricted from viewing certain Folders within the case, they will see the following dialog when accessing the Review Dashboard. To keep from seeing it every time, the Do not display in future checkbox can be selected.



8.1.4.2 Restricted Access by Custodian(s)/Media

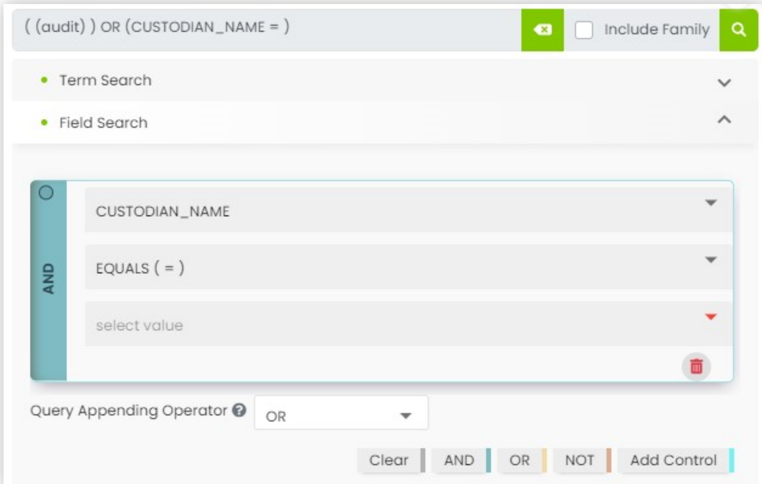
If users are restricted from viewing certain Custodian(s)/Media within the case, they will see the following dialog when accessing the Review Dashboard. To keep from seeing it every time, the Do not display in future checkbox can be selected.



8.2 Search Bar

There is a Search Bar displayed at the top of the Review Dashboard. The Search field shows the query for which the results are displayed (*fileid>0* means all files in the case). Enter either individual search terms or complex search conditions using multiple lines.

- After adding your search terms, click the Search button to run the search.
- Clear the contents of the search by clicking the Clear button.
- Use the Include Family check box to include parent/child documents in the search results.
- For details about proper search syntax, click the Other Options button at the right end of the Search Bar and select Search Query Help.



As shown above, you may run combined term, field, and other types of searches using the Advanced Query Builder, which is accessed by clicking into the search field on the Search Bar. For detailed information on searching, refer to Section 9 below.

8.2.1 Search Bar Options

At the far right end of the Search Bar are navigation buttons and several other option buttons.

- Send to Analyze – Sends documents to the Analyze Dashboard
- Share Documents – Displays Document Share dialog to send a secure link to the documents to either external or internal parties
- Send to Production – Sends documents to the Produce Dashboard
- More Options – Displays other available options described in the sections below

NOTE: For TOA cases, some options may be grayed out, because they are unavailable.

8.2.2 Send to Analyze

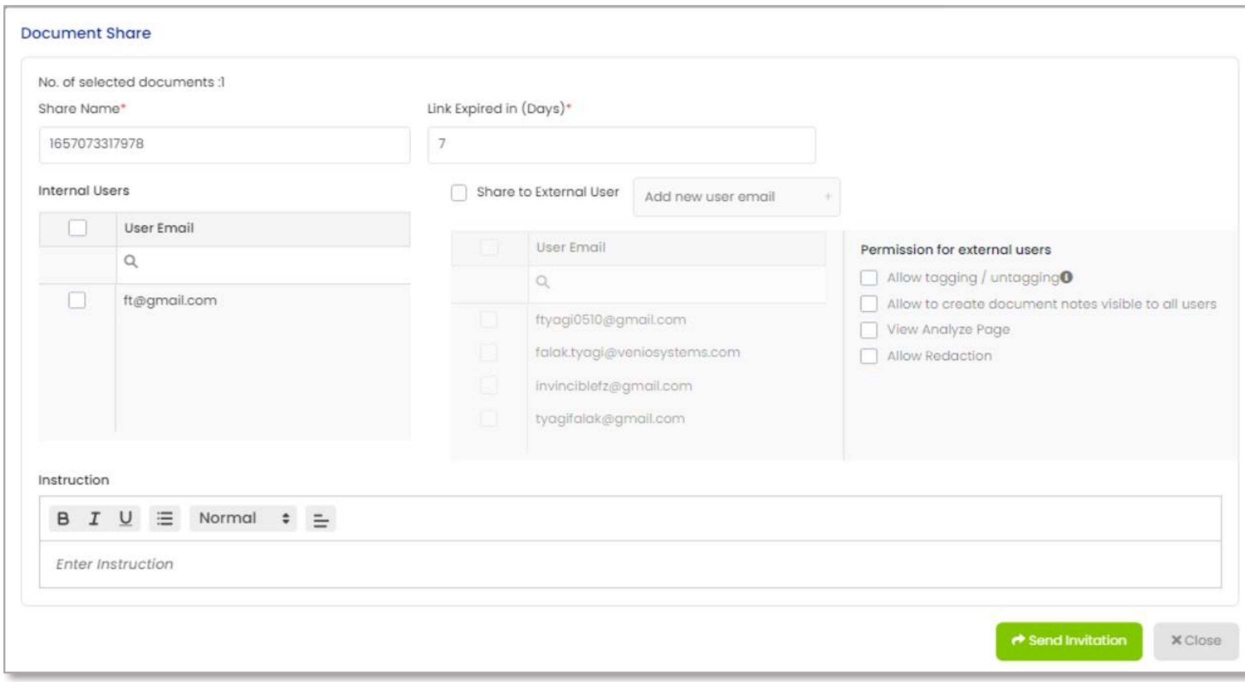
On the Search bar, click the Send to Analyze button to send the search results for analysis within the Analyze Dashboard.

8.2.3 Share Documents

VOD allows you to share documents with internal or external parties. You may control the level of access they have and set an expiration date for the shared link. For security purposes, all activities are tracked in the VenioOne database.

1. In the Document Table, select the documents you wish to share.
2. On the Search Bar, click the Share Documents button.

   The Document Share dialog displays.



3. Enter the Share Name and Link Expired in (Days) duration.
4. In the Internal Users section, select the internal recipients with whom you want to share.
5. For external sharing, select the Share to External User check box and then choose or add the email addresses of the external recipients.

   NOTE: External sharing will only be available, if enabled in your VenioOne database.

6. In the Permission for external users section, select the checkbox to provide any of the following permissions to user:
   - Allow tagging/untagging
   - Allow to create document notes visible to all users
   - View Analyze Page
   - Allow Redaction

7. If you wish to enter any instructions or notes to be shared when sharing documents, enter them in the Instruction section. You can also format the text using the formatting options available.
8. Choose either Full Rights or Read Only for the permission level.

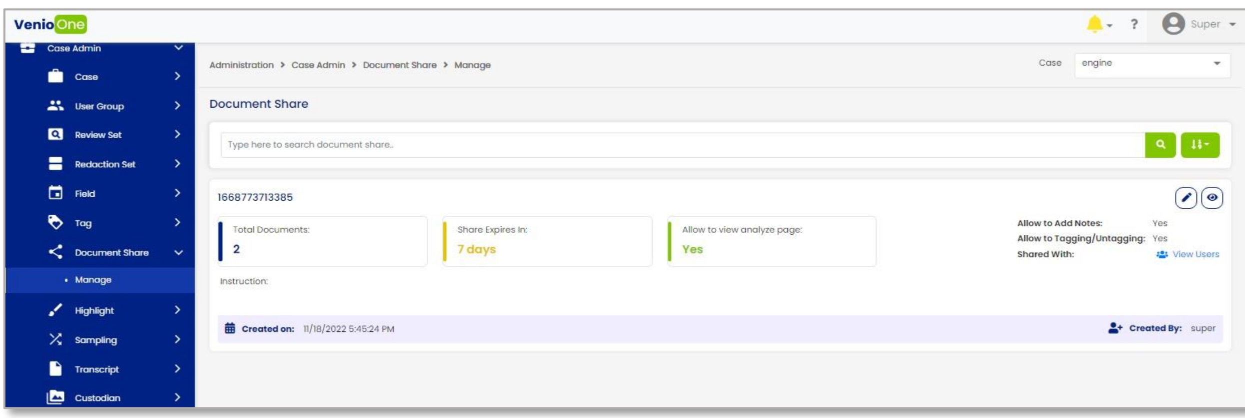
   NOTE: Admin and Expert level users will always have Read/Write permissions.

9. Check the option to Allow to add document notes if the recipients should be allowed to add document notes.
10. Click the Send Invitation button to complete the process.

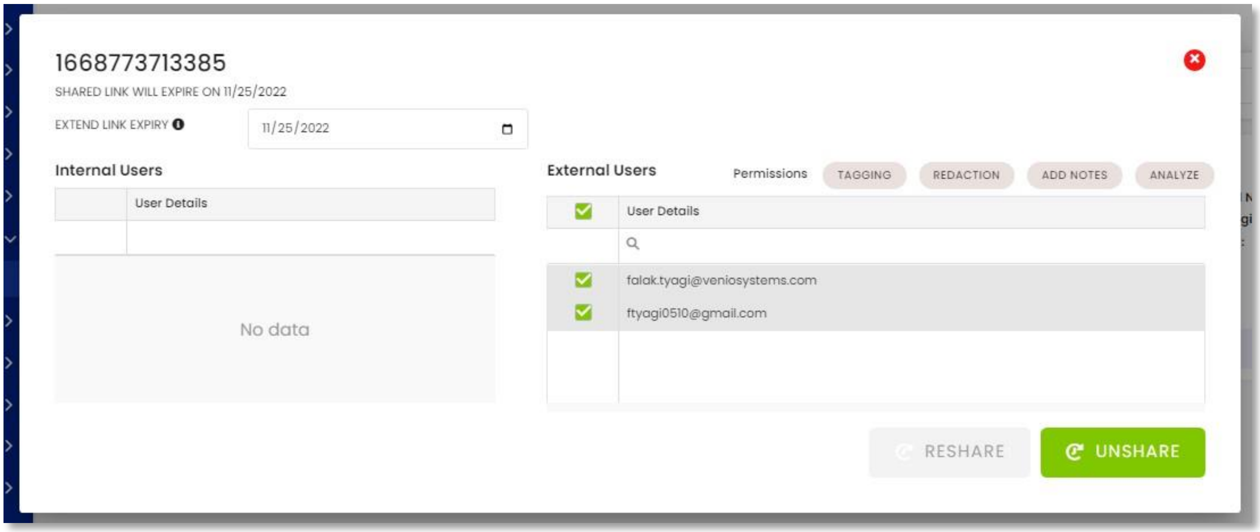
    Parties will receive an email with a link to access the documents shared with them.

8.2.3.1 Manage Document Sharing

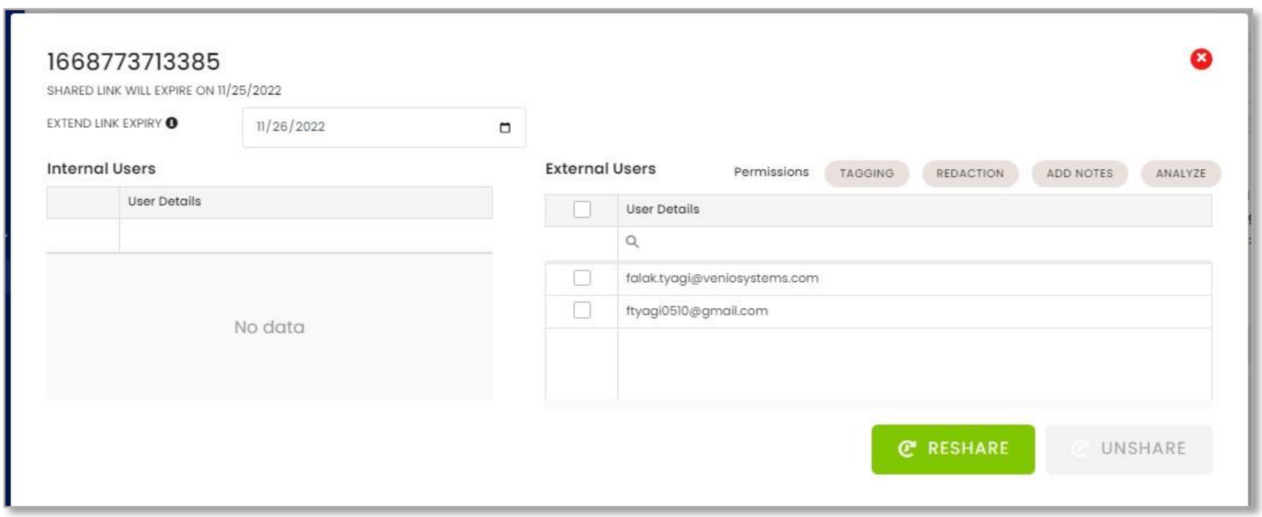
To manage features of document sharing as an admin, navigate to Admin > Case Admin > Document Share > Manage



As an Admin, you can click on the eye icon and see all the users with whom the document has been shared.
You can also extend the link expiry by clicking on Edit. Once the link is extended, an email communication is sent to the users notifying them about the new link. The extension applies to all users that the document has been currently shared with.



The reshare button is disabled when the admin unselects any user. Also, Admin when unshared, the links also are expired for the specific user.



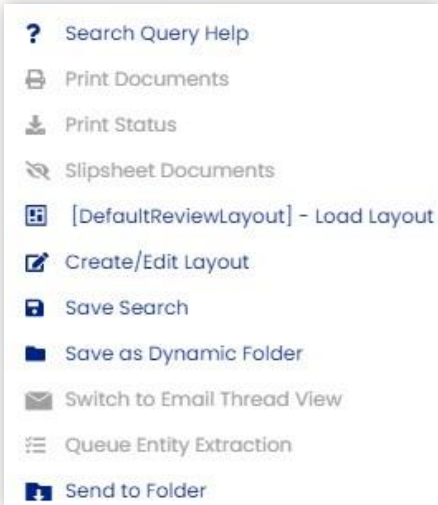
8.2.4 Send to Production

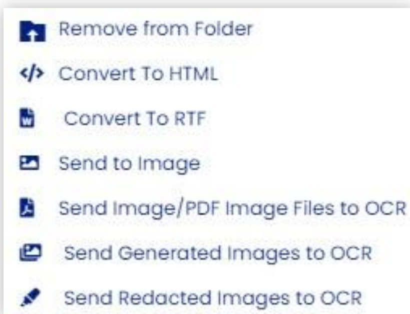
On the Search bar, click the Send to Production button to send the search results for production. The Create Production dialog will open for you to create a new production for the selected documents. For more details, please refer to Section 10 below, which covers the Production module.

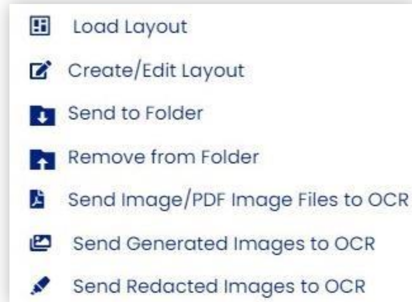
8.2.5 More Options

At the end of the Search bar is a More Options button which opens a large menu of options when viewing search results (shown below left). When viewing a Review Set, the options are more limited (shown below right).

Full
Options
Review
Options



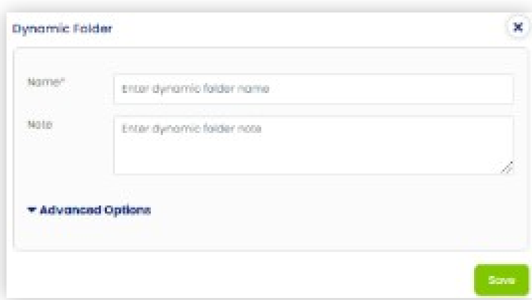


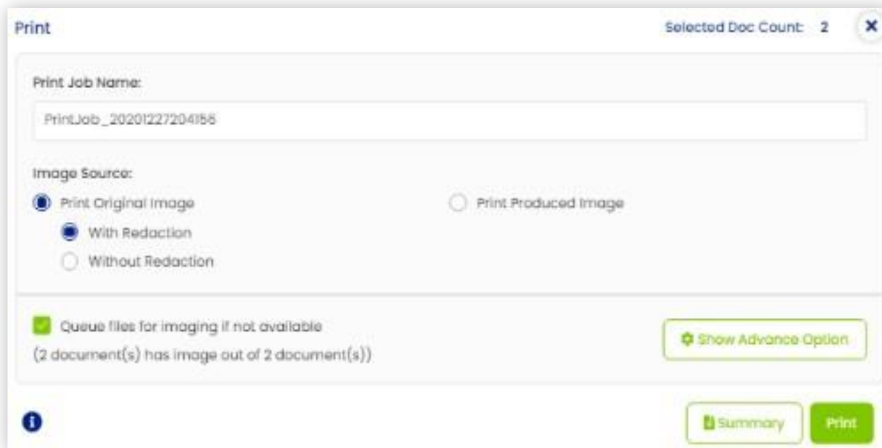


More
Menu
Set More
Menu

NOTE: For TOA projects, some of the Other Options will not be displayed in the Review Dashboard as they are not available in TOA projects.

Below is a summary of the items on the Other Options menu. Additional details are in the sections below.

Mark as Reviewed	Marks the selected file(s) as Reviewed. All files must be marked as reviewed to check in a batch.
Load Layout	Displays the Load Layout dialog for you to switch to a different layout
Create/Edit Layout	Displays the Save Layout dialog for you to create or update a layout
Save Search	Displays the Save Search dialog for you to name and save the search. Saved searches, as well as the Search History, are accessible in the hidden side panel on the right side of the Review Dashboard.
Save as Dynamic Folder	Displays the Dynamic Folder dialog for you to name and save the Dynamic Folder. Advanced Options allow control over which groups may access the Dynamic Folder. Dynamic Folders are accessible in the hidden side panel on the right side of the Review Dashboard. 
Switch to Email Thread View	Switches the Normal View to Email Thread View.
Send to Folder	Opens the Folders dialog to add selected files to a folder.
Remove from Folder	Opens the Folders dialog to remove selected files from a folder.

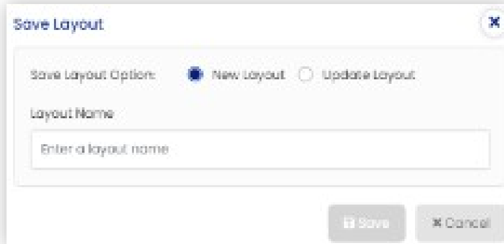
Send Image/PDF Image Files to OCR	Sends selected files to have text extracted by the OCR engine.
Send Generated Images to OCR	Sends selected files to have text extracted by the OCR engine.
Send Redacted Images to OCR	Sends selected files to have text extracted by the OCR engine.
Print Documents	Opens the Print dialog for you to send the selected documents to print
	
Print Status	Displays the Print Job Status dialog
Slipsheet Documents	Displays the Create Slipsheet dialog. For information on its use, go to Section 11.10.1 Create Slipsheet in System Admin below.
Queue Entity Extraction	Queues entity extraction from the VOD search grid

8.2.5.1 Saving and Using Layouts

If you have customized your screen layout, you may wish to save it. You have the ability to save and load multiple screen layouts for use across your matters.

On the Search Bar, click the More Options > Create/Edit Layout option

The Save Layout dialog displays

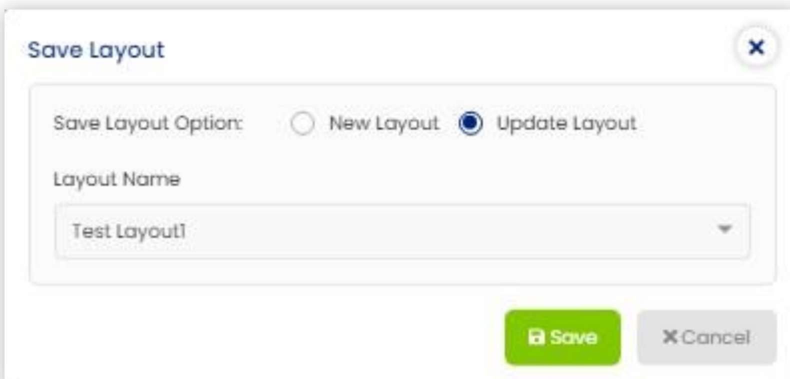


To save the layout, select the New radio button.

Enter the Layout Name

Click the Save button to save the new layout

NOTE: To update the layout (other than DefaultReviewLayout and Layouts associated with a client that are non-editable), load the layout to be updated as the current layout first, then go to create/Edit Layout, select the Update Layout radio button and click the Save button.



To switch layouts, click the More Options > Load Layout button. Select the Layout from the dropdown menu and click the Load button.

8.2.5.2 Saving Searches

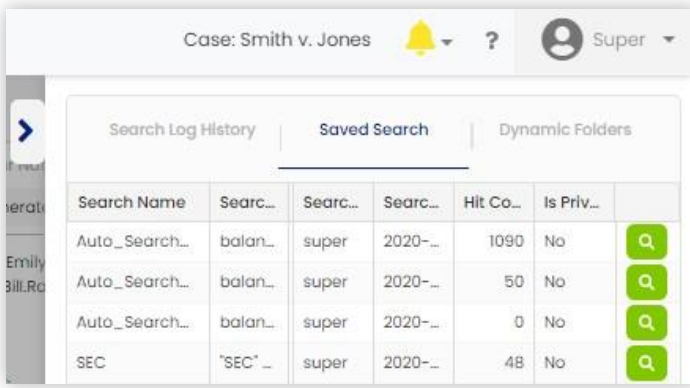
On the Search Bar, click More Options > Save Search.

The Save Search dialog will display.

Enter a Search Name and click the Save button to save the search for future use.

8.2.5.3 Accessing Saved Searches

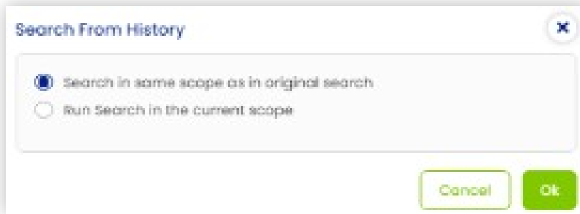
Expand the side panel on the right of the Review Dashboard to access the Saved Search tab. Click the magnifying glass Search button adjacent to the search to rerun it.



8.2.5.4 Search Log History

To view all past searches, expand the side panel on the right of the Review Dashboard and click the Search Log History tab. Click the adjacent magnifying glass Search button to rerun a search.

You will have an option to either run the search in the same scope as the original search or the current scope. Make your selection and then click the OK button.



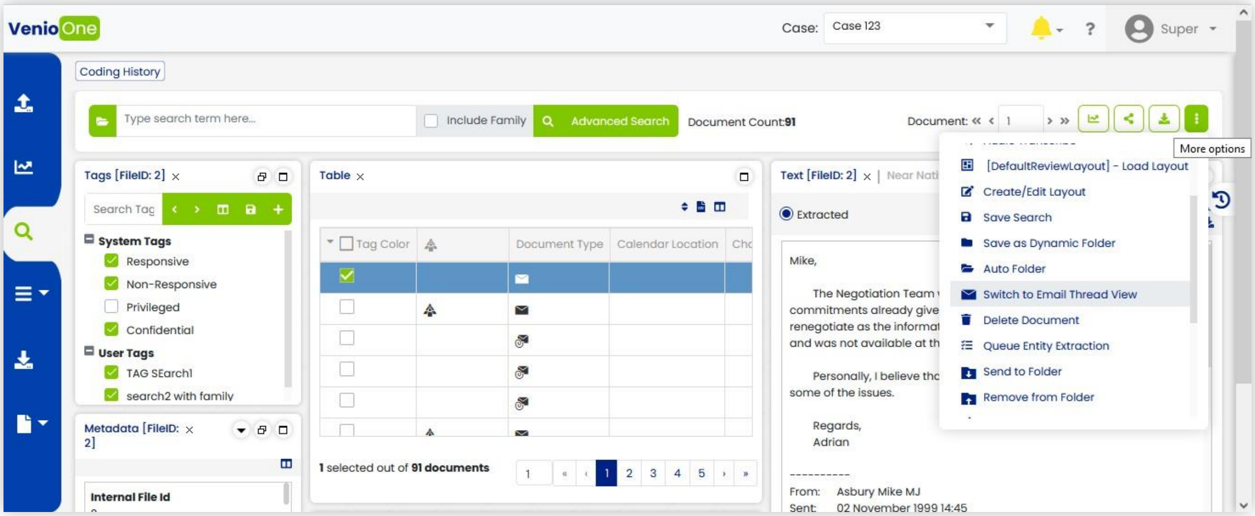
8.2.5.5 Email Thread View

You can view email message threads only in Email Thread View. Generated emails are missing emails within a thread that the system creates which are extrapolated from the email bodies of valid emails in the thread. These are only visible in the email threading view and are display only. Missing and generated emails are same but for the generated ones, Venio is able to rebuild the missing email and populate limited metadata. So a generated email is a missing email that it is able to generate from the body of other emails in the thread. Whereas, Missing emails cannot be generated due to lack of something needed to generate a view of it. For more information, click here.

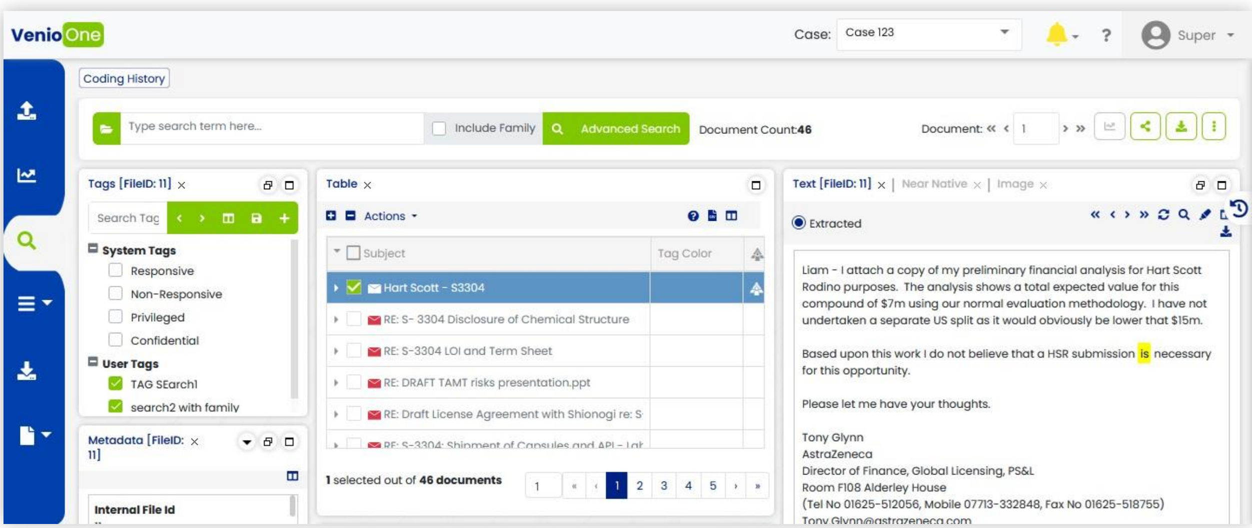
Different types of email files are denoted by different color icons.

- Inclusive Email – Green Message icon( )
- Email Document – Gray Message icon( )
- Generated Email – Yellow Message Icon( )
- Missing Email – Red Message Icon ( )

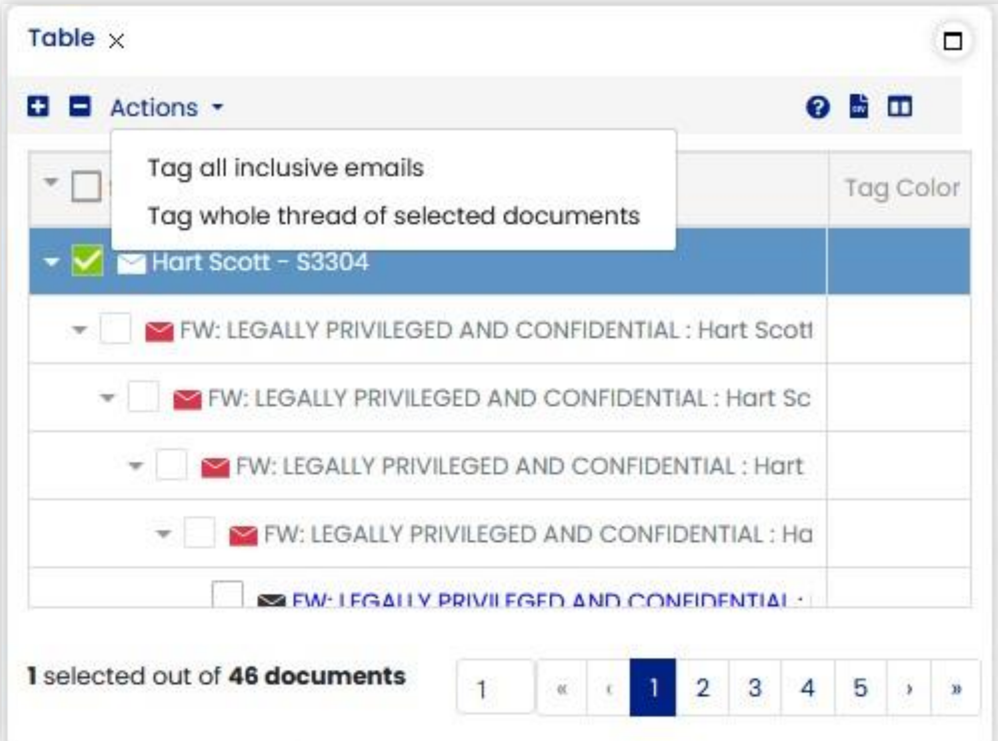
To navigate to the Email Thread View, click Switch to Email Thread View from More Options:



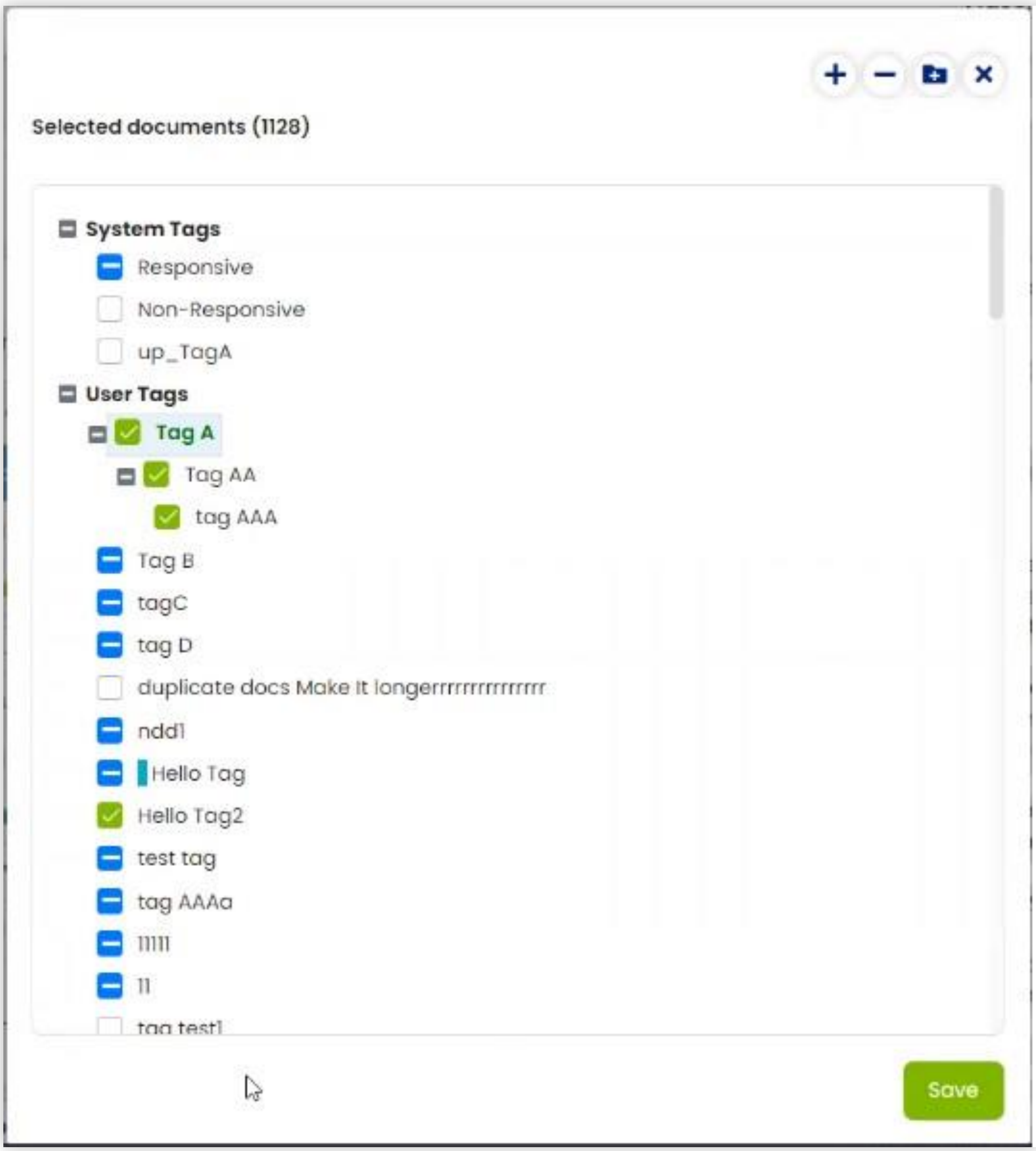
The Email Thread View appears.



In the Email Thread View, you can expand and collapse the emails using the Expand all, Collapse all icons available in the Table section. You can also tag all inclusive emails or tag whole email thread of selected documents using the options available in the Actions drop down:



Tag all inclusive emails – By selecting this option, all the inclusive emails that are in the current search results will be tagged. You can also untag any of the available tagged emails using this option.



Select the tags from the available list. Click Save to save the tags. A message confirming the inclusive emails are tagged appears:

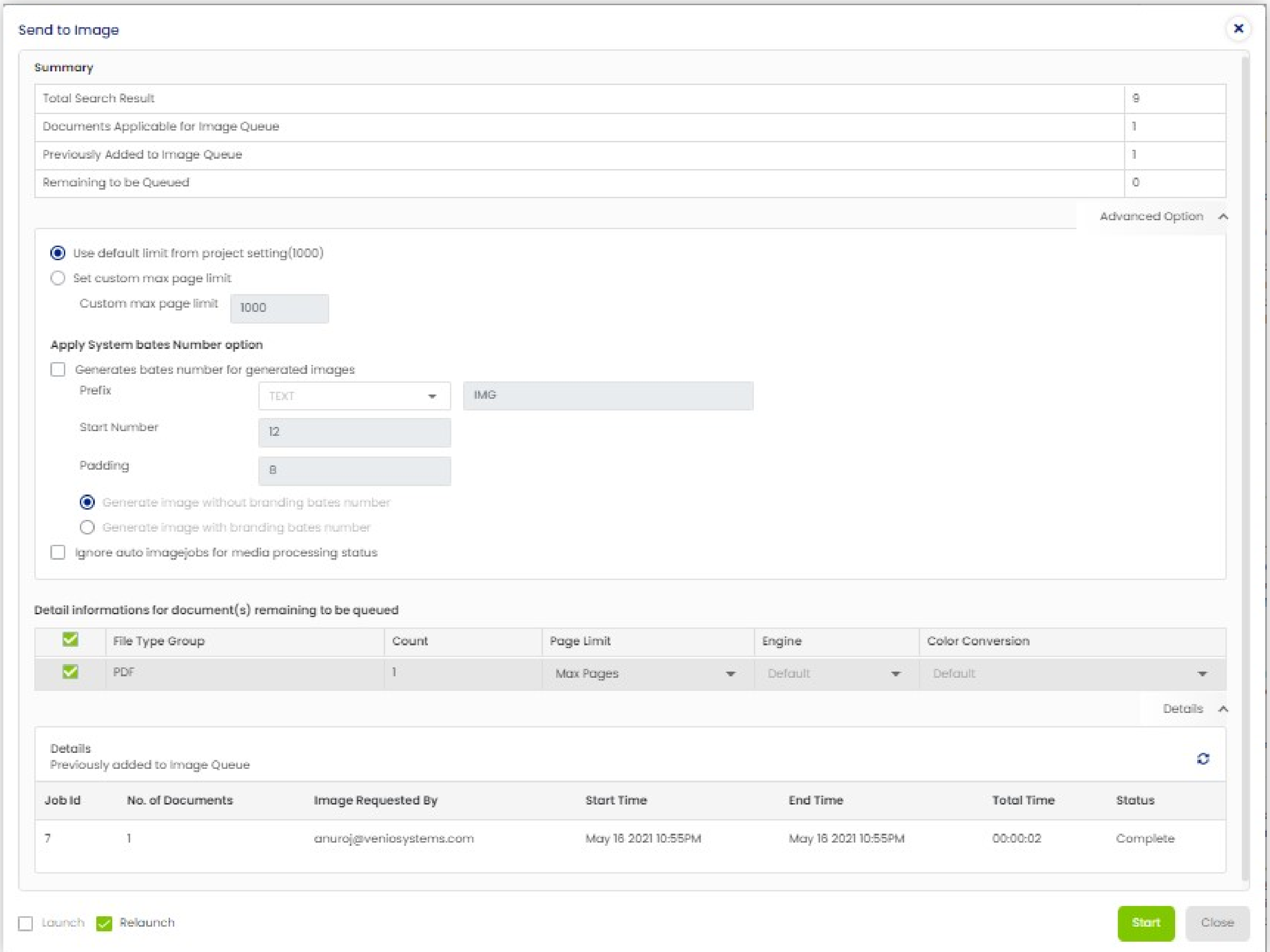
Tag whole email thread of selected documents - By selecting this option, all the inclusive emails that of the selected documents will be tagged. You can also untag any of the available tagged emails using this option.
Select the tags from the available list. Click Save to save the tags. A message confirming the inclusive emails are tagged appears:

You can click Switch to Normal View to go back to normal view.

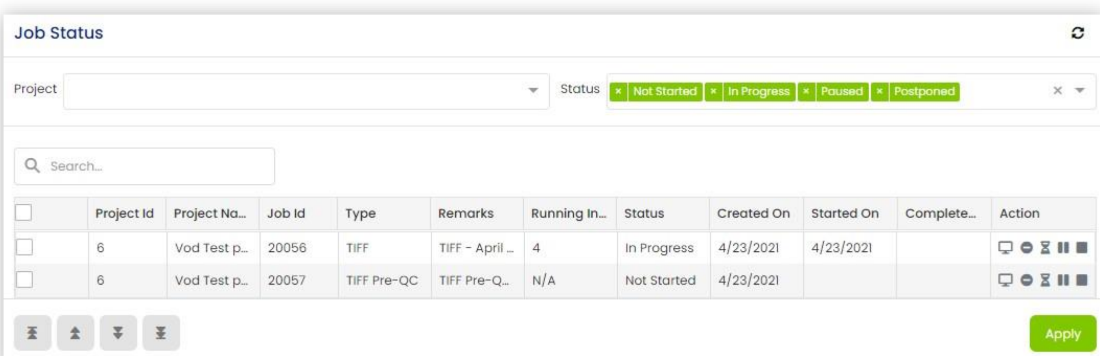
8.2.5.6 Send to Image

Documents can be sent to Image from search results. After running a search, select the document(s) and then click Other Options (right end of the Search Bar). Select Send to Image from the menu.

A summary of the items for Send to Image is displayed. Page Limit, Engine and Color Conversion can be selected as desired in the Document Detail table. Advanced Options include items related to the Bates Numbering and page limit. The Details section can be expanded to view previous image queue details. At the bottom left are check boxes to Launch and Relaunch. Select Launch if it is the first time; otherwise, select Relaunch. Then, click the Start button to start the imaging process.



The Tiff and Tiff Pre- QC jobs will be queued and can be monitored from System Admin > Job > Status (shown below) or from the Details section in the same Send to Image dialog.



8.2.5.7 Queue Entity Extraction

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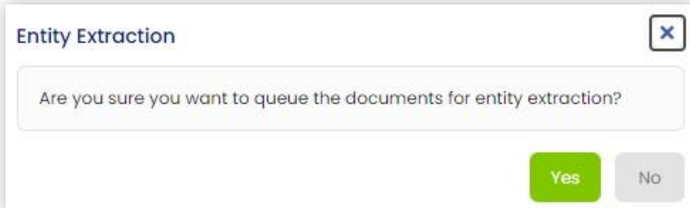
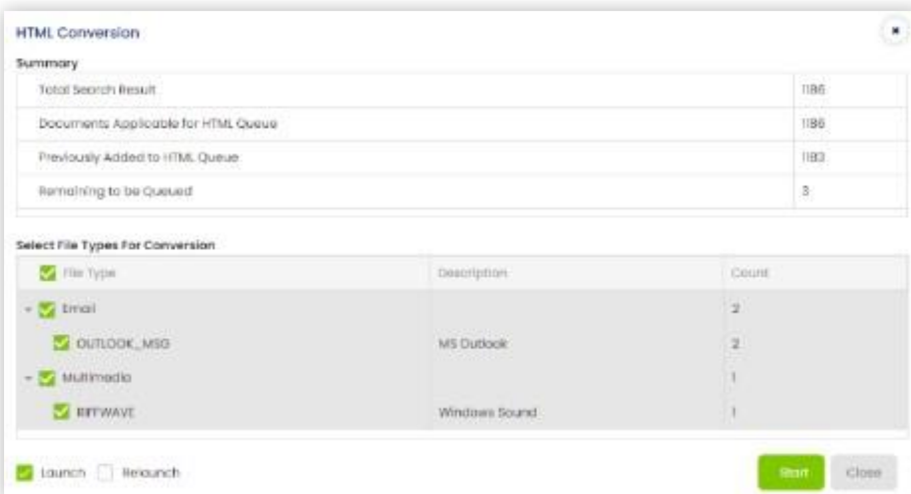
Within the Document Table, click More Options > Queue Entity Extraction to queue the entity extraction of VOD search results. Then, a message will display asking whether to queue the job. Click Yes to queue the job.



8.2.5.8 Convert to HTML

Documents can be converted into HTML from search results. After running a search, select a document (or multiple documents) and then click More Options (3 vertical dots in the top right corner of the Document Table). Select Convert to HTML from the menu.

A summary of the items for HTML conversion is displayed. At the bottom left are check boxes to Launch and Relaunch. Select Launch if it is the first time; otherwise, select Relaunch. Then, click the Start button to start the conversion.

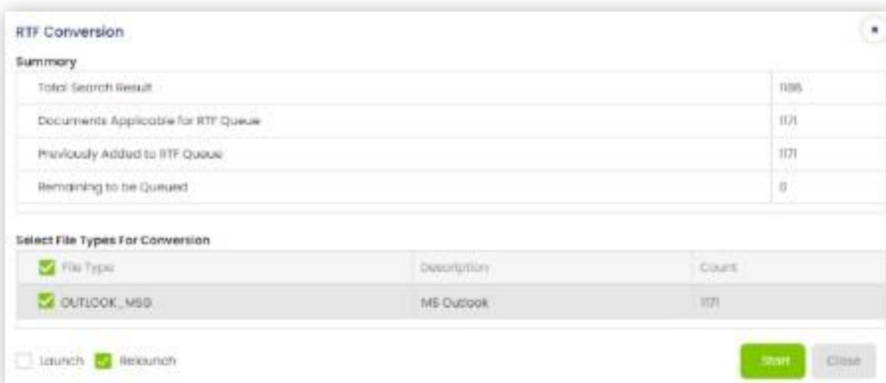


The HTML Conversion jobs will be queued and can be monitored from System Admin > Job > Status.

8.2.5.9 Convert to RTF

Documents can be converted into RTF from search results. After running a search, select a document (or multiple documents) and then click More Options (3 vertical dots in the top right corner of the Document Table). Select Convert to RTF from the menu.

A summary of the items for RTF conversion is displayed. At the bottom left are check boxes to Launch and Relaunch. Select Launch if it is the first time; otherwise, select Relaunch. Then, click the Start button to start the conversion.



The RTF Conversion jobs will be queued and can be monitored from System Admin > Job > Status.

8.2.5.10 Creating Slipsheets

Within the Document Table, if they have the rights to do so, reviewers may create slipsheets to replace the document images for either selected documents or all documents. Reviewers may either enter text and/or fields or use an image. You may also make Slipsheet Templates available for their use.

1. Click the Other Options button and then click Slipsheet Documents.

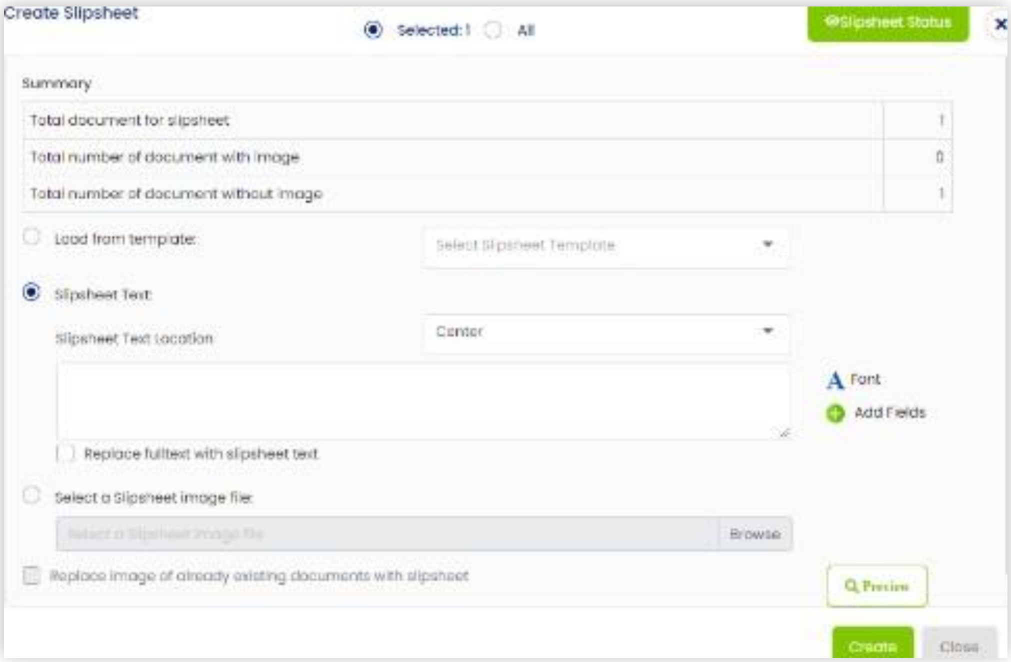
   The Create Slipsheet dialog displays.

1. Click either the Selected or All radio button to choose which images will be replaced with slipsheets.

   The Summary section will update with the number of documents for which slipsheets will be added.

2. Choose from the following radio buttons:

- Load from Template – Select template from drop-down list
- Slipsheet Text – Choose the location, text, and fields to be included
- Select a slipsheet image file – Use the Browse button to go to the location of the file

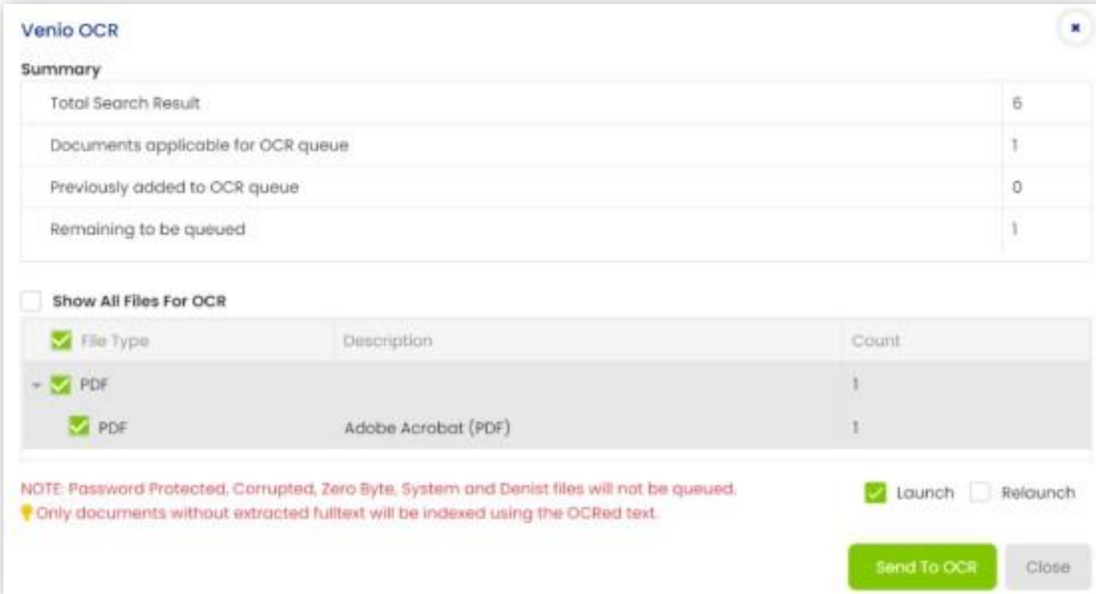


3. Use the Preview button to review your slipsheet(s) prior to creation.
4. If using Slipsheet Text option, you may check the option to Replace fulltext with slipsheet text.
5. If there are existing images of documents already, you may select the option to Replace images of already existing documents with slipsheet.
6. Click the Create button to generate the slipsheets.

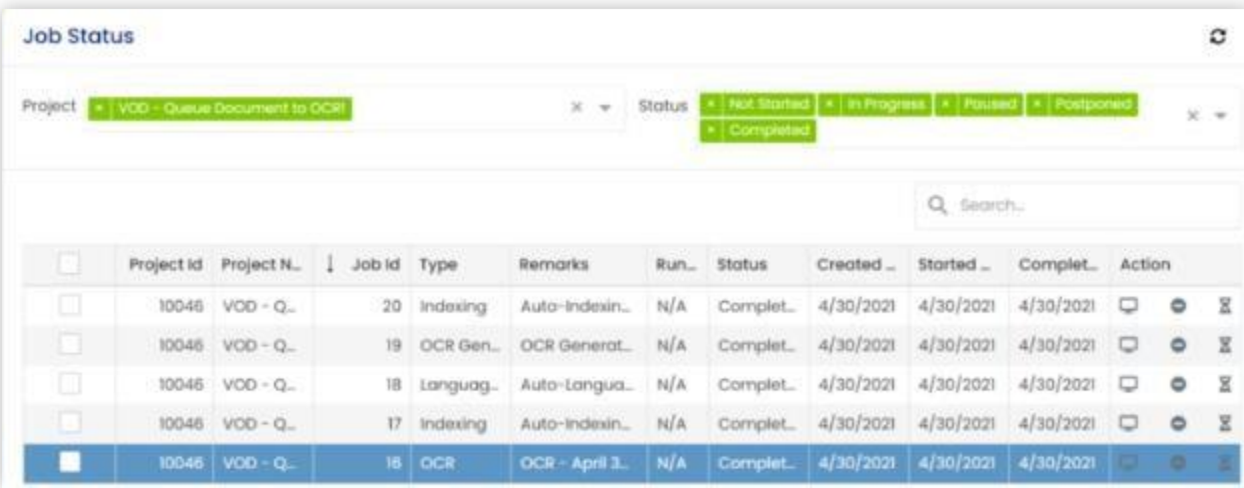
8.2.5.11 OCR Image/PDF Documents

Documents can be sent to the OCR engine from the search results. After running a search, select document(s) and then click the Other Options button (right end of the Search Bar). Select Send Image/PDF Image Files to OCR from the menu.

A summary of the items to be OCRed is displayed. At the bottom left are check boxes to Launch and Relaunch. Select Launch if it is the first time; otherwise, select Relaunch. Then, click the Send to OCR button to send the files to the OCR engine.



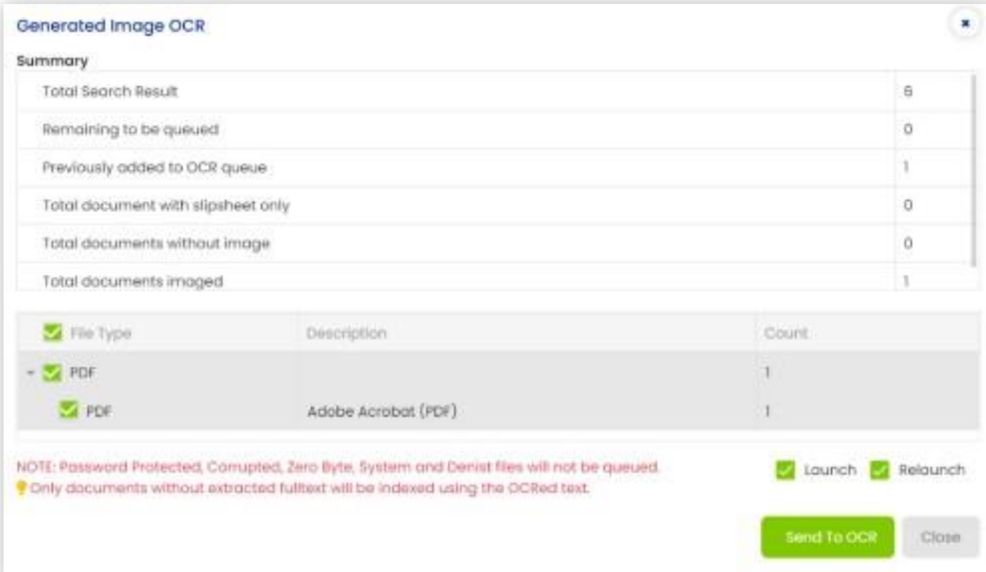
The jobs will be queued and can be monitored from System Admin > Job > Status.



8.2.5.12 OCR Tiff Documents

Documents can be sent to the OCR engine from the search results. After running a search, select the document(s) and then click the Other Options button (right end of the Search Bar). Select Send Generated Images to OCR from the menu.

A summary of the items to be OCRed is displayed. At the bottom left are check boxes to Launch and Relaunch. Select Launch if it is the first time; otherwise, select Relaunch. Then, click the Send to OCR button to send the files to the OCR engine.



The jobs will be queued and can be monitored from System Admin > Job > Status.

8.2.5.13 OCR Redacted Documents

Documents can be sent to the OCR engine from the search results. After running a search, select the document(s) and then click the Other Options button (right end of the Search Bar). Select Send Redacted Images to OCR from the menu.

A summary of the items to be OCRed is displayed. At the bottom left are check boxes to Launch and Relaunch. Select Launch if it is the first time; otherwise, select Relaunch. Then, click the Send to OCR button to send the files to the OCR engine.

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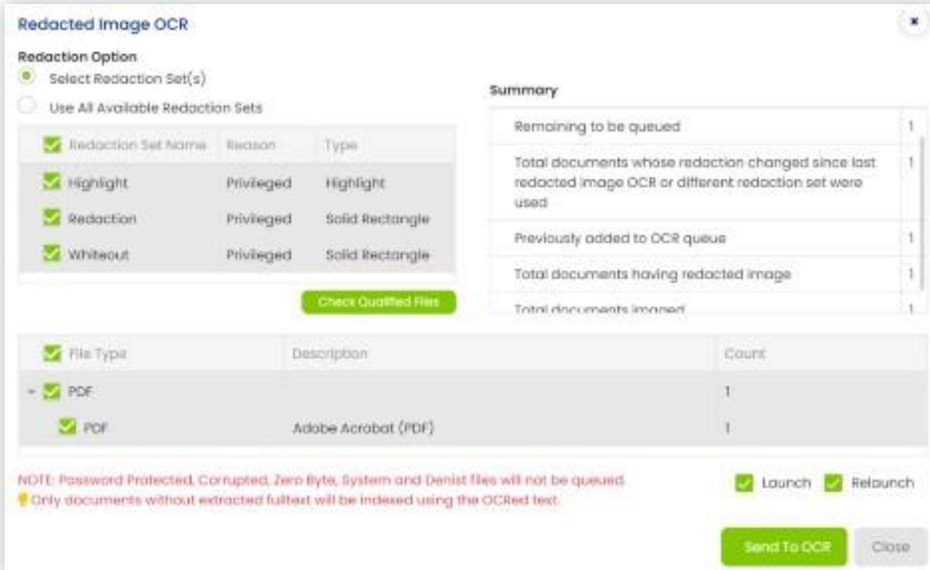
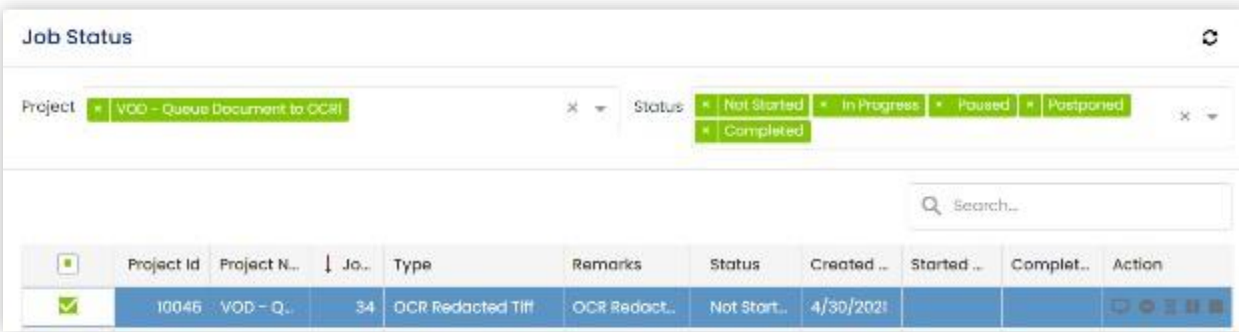
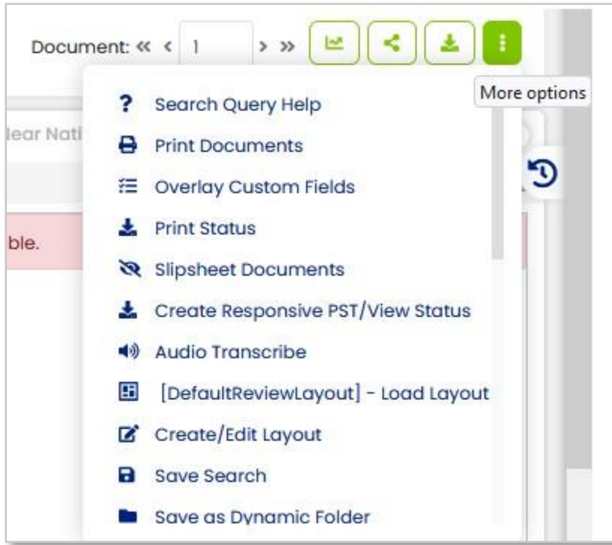


The jobs will be queued and can be monitored from System Admin > Job > Status.



8.2.6 Overlay Custom Fields

To navigate, click on the 3 vertical dots in the top right corner of the Document Table and click on Overlay Custom Fields.

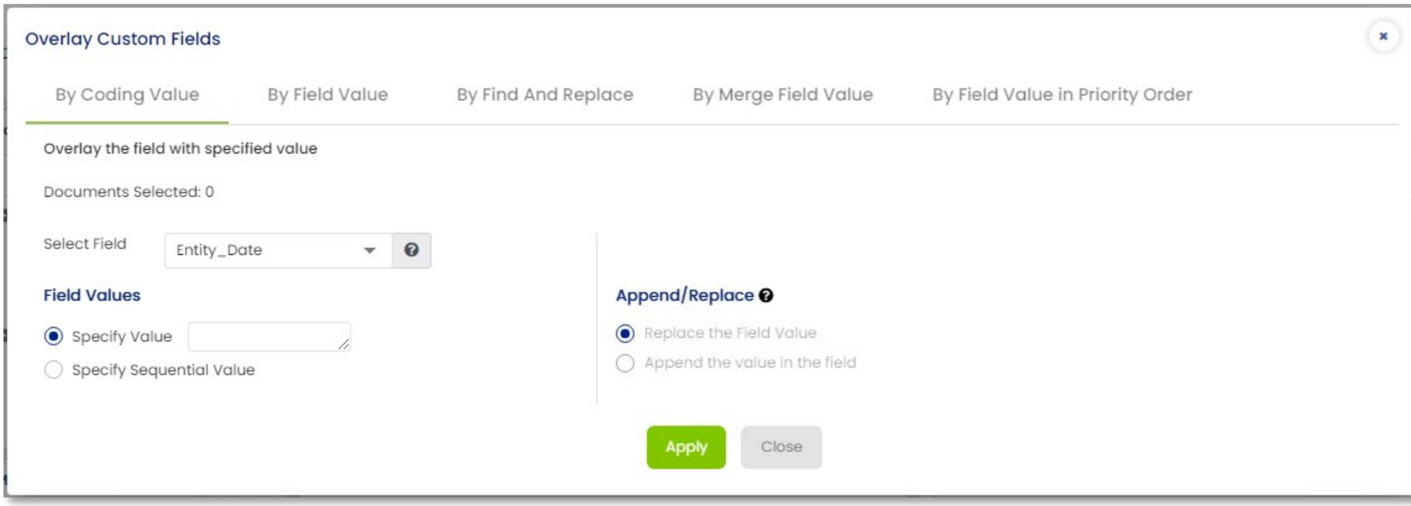


8.2.6.1 By Coding Value

Select Field from the drop-down list all the custom fields created from the custom fields should be listed.

The value entered in ‘Specify Value’ will replace the value of the fields selected. The changed value will only be displayed in new search result.
Following cases should be implied when overlaying custom fields by coding value

- Select Field: The drop-down should list all the custom field to code and Specify value will overwrite the value of selected field in search result, which will be reflected in new search. If the selected field is
- Integer custom field: It allows user to type and validate for integer value while starting the coding
- Datetime custom field: Date picker should be displayed in Specify Value option, specifying sequential value should be disabled when date time is selected.
- Numeric field: Prefix and Padding should be disabled.
- Coding field with configuration to allow only predefined value: It should allow user to choose the predefined values.

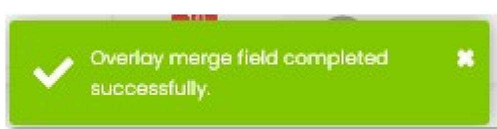


- Coding field with configuration to multiple value: Specifying multiple values should be allowed with delimiter defined and user specify to append the field value, the predefined delimiter should be selected and drop-down should be disabled to restrict delimiter change. It should select correct delimiter and be disabled.
- Append/Replace: It should work correctly for incremental coding.

8.2.6.2 By Merge Field Value

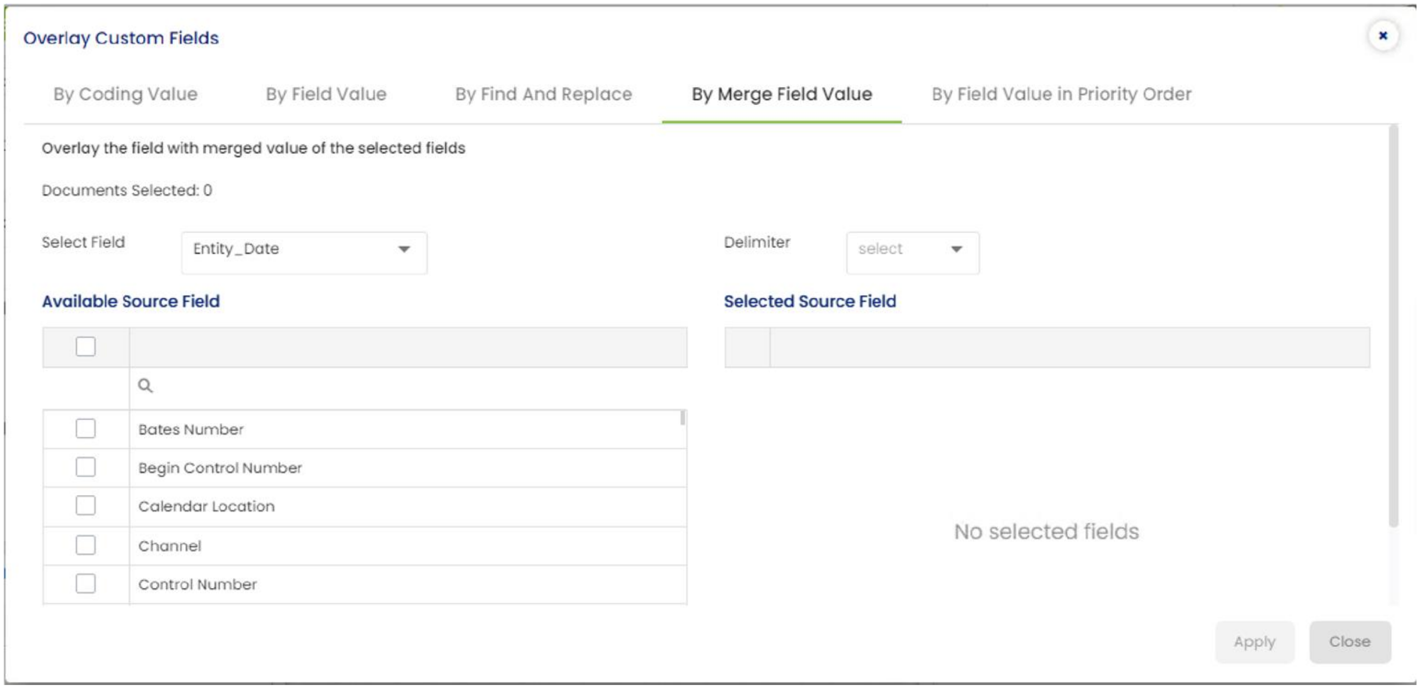
A field overlay enables you to modify the field's database properties.

1. Select Field from the drop-down list all the custom fields created from the custom fields should be listed.
2. Choose any Delimiter from the drop-down list.
3. Select the source fields from the Available Source Fields. The selected fields are displayed in the Selected Source Fields.
4. Click Apply. A success message appears:



8.2.6.3 By Find and Replace

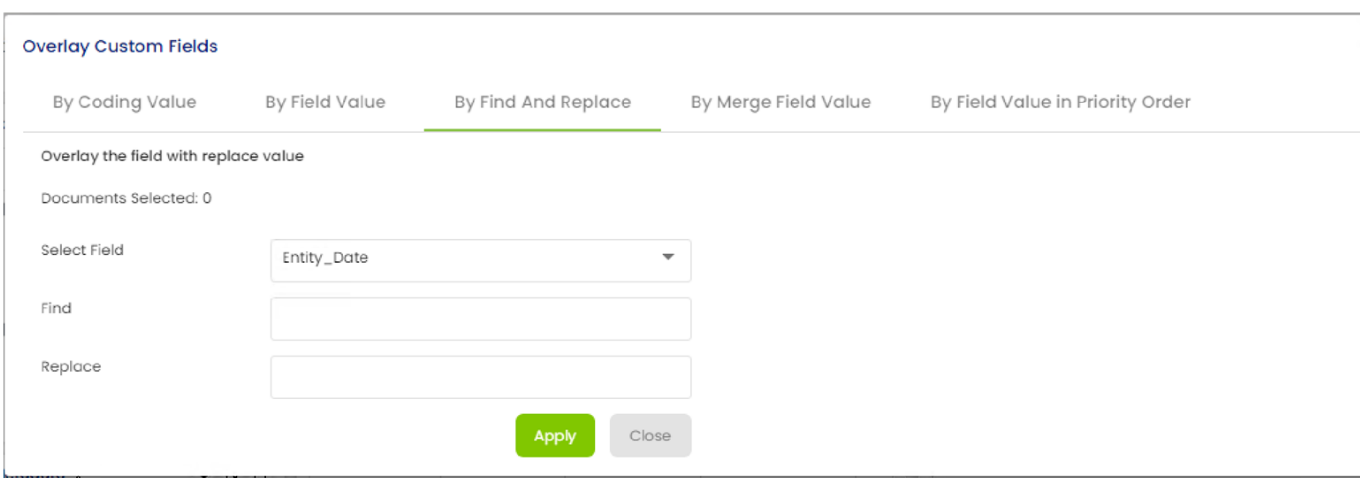
1. In the Overlay Custom Fields, select By Find and Replace.



2. Select the required custom field, enter the text to be replaced in the Find text box and text to replace it with in the Replace text box.
3. Click Apply. The old value of the selected field is overlaid by the new value

8.2.6.4 By Field Value in Priority Order

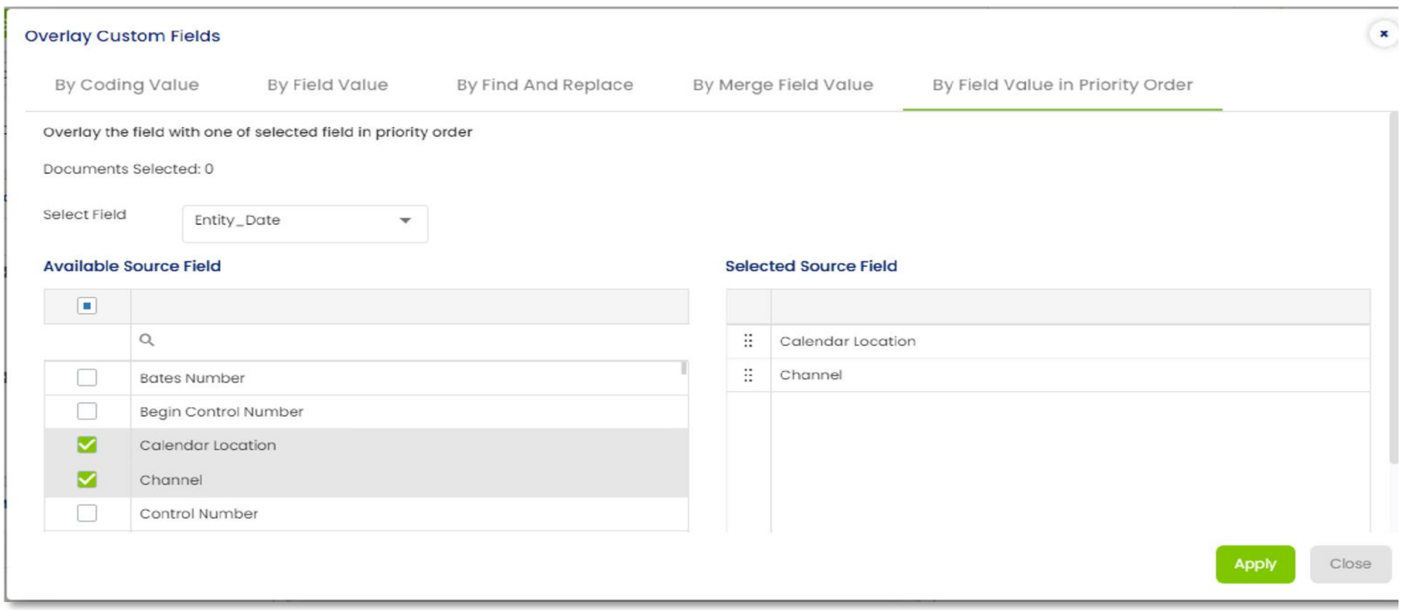
1. In the Overlay Custom Fields, select By Field Value in Priority Order.
2. Select the required custom field. Select the Available Source Field required and drag it to Selected Source Field.
3. Click Apply.



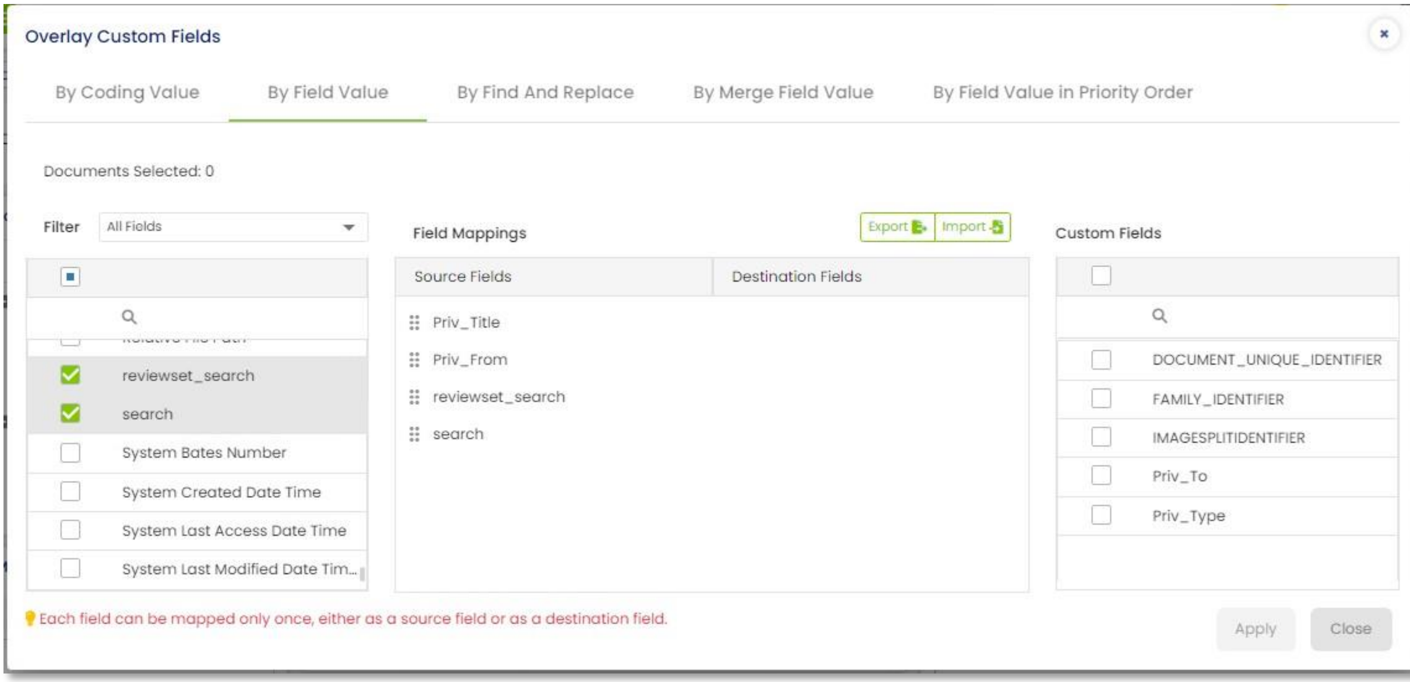
4. The value of selected field is overlaid by the value of Selected Source Field according to the priority of the fields. If the field with higher priority doesn't have any value, then the value of the next field is selected.

8.2.6.5 By Field Value

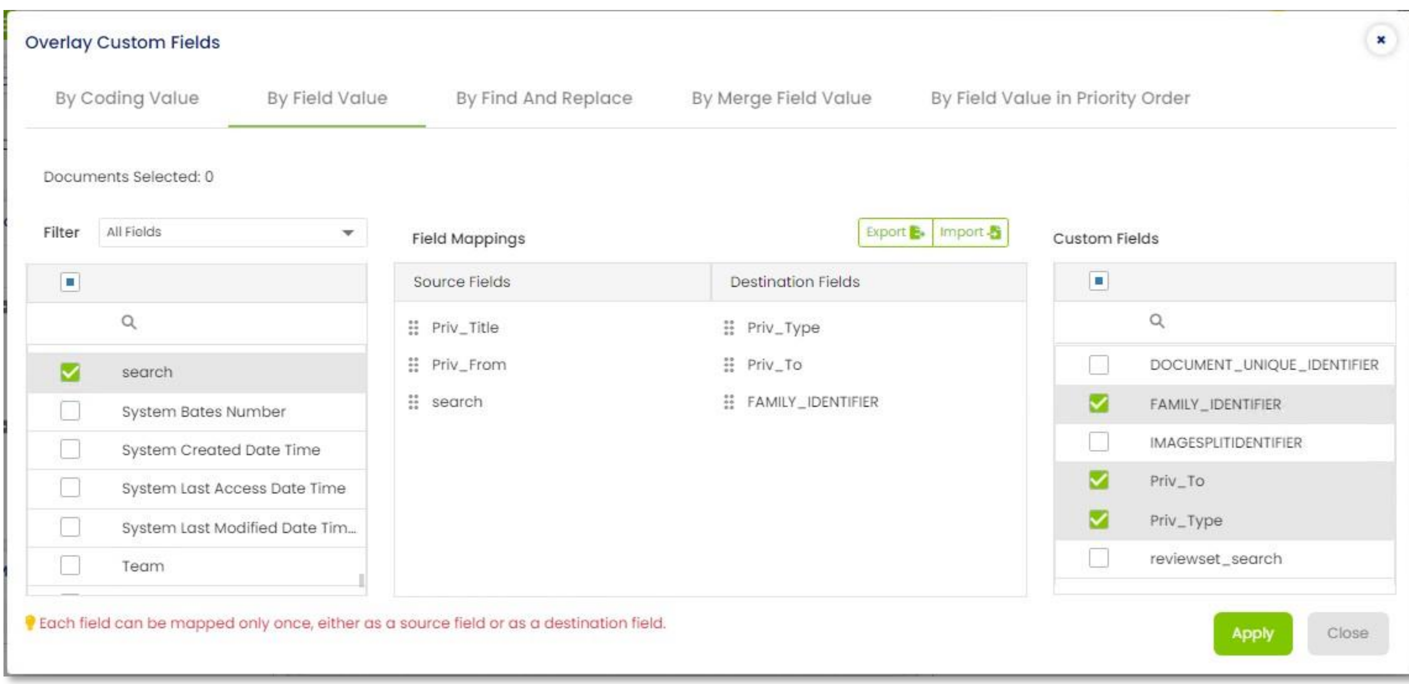
Right-click the search results and choose Overlay Custom Fields. Depending on the requirement, choose either Selected, Unselected or All from the sub menu to copy field values to a custom field.



In the Overlay Custom Fields dialog, the left side has Venio fields and custom fields that are used as "source fields." The right side has custom fields used as "destination fields". The objective of this function is to copy field values of "source fields" to "destination fields".



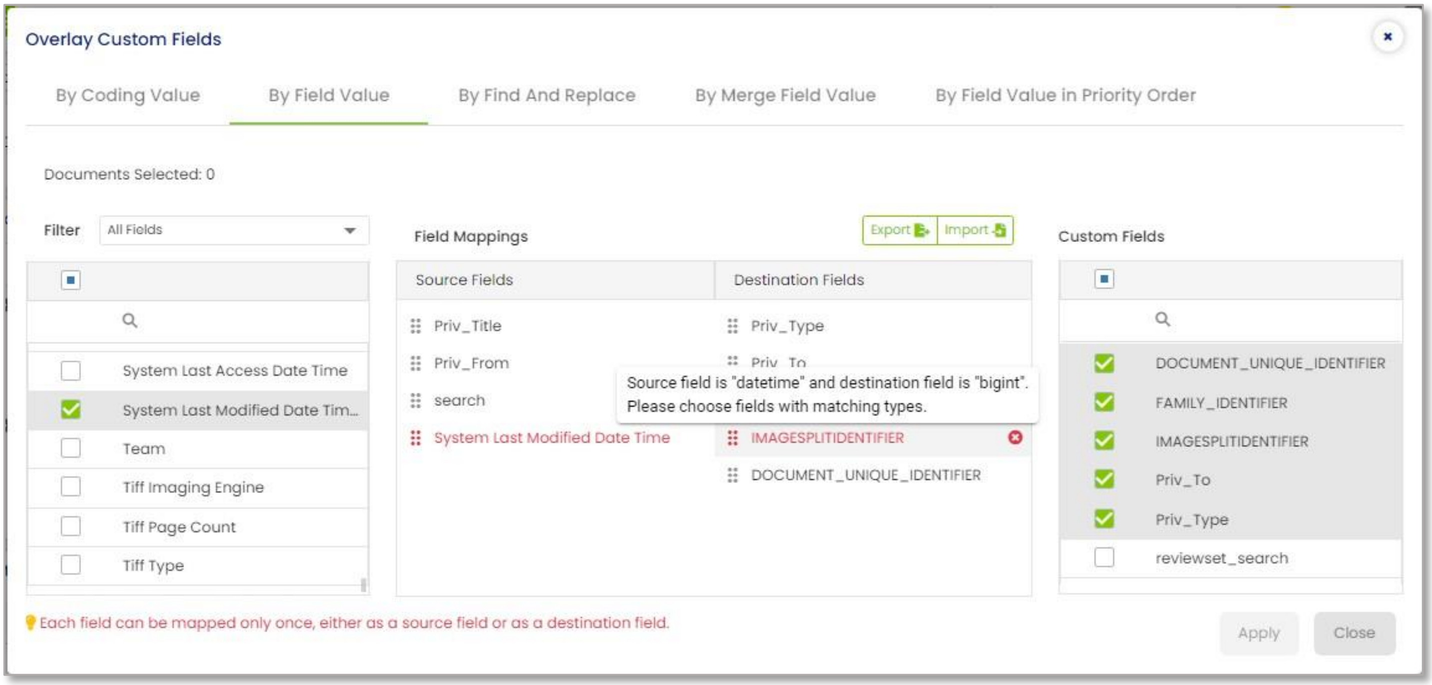
Move to the field of your choice from source field list and map it to the required destination field.



Click Apply once you have completed mapping the fields.

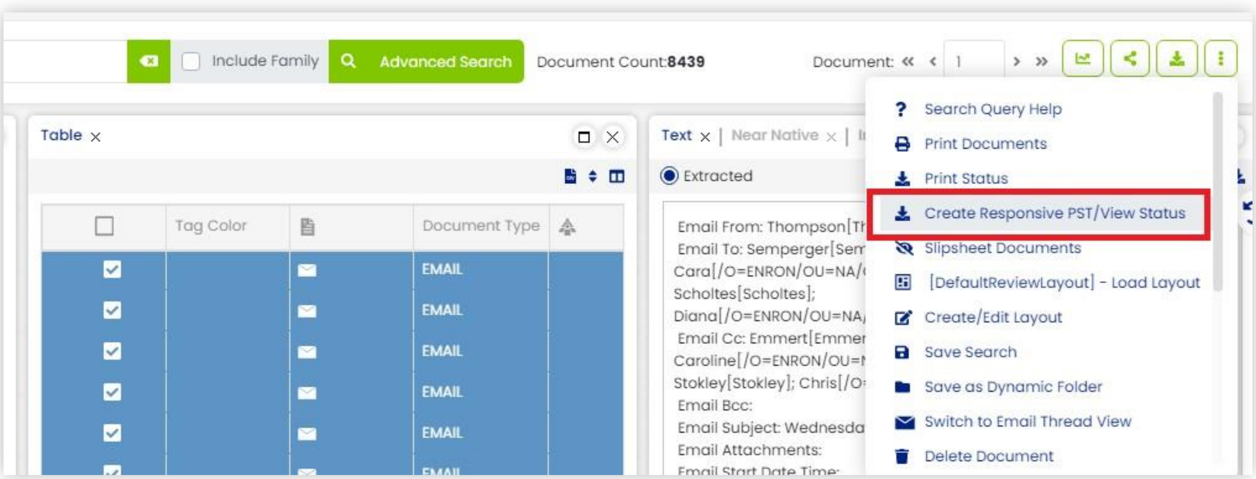
If there are any problems or mismatch in mapping fields, a warning window is shown. Please follow the instructions as indicated in the warning window.

8.2.7 Responsive PST Creation

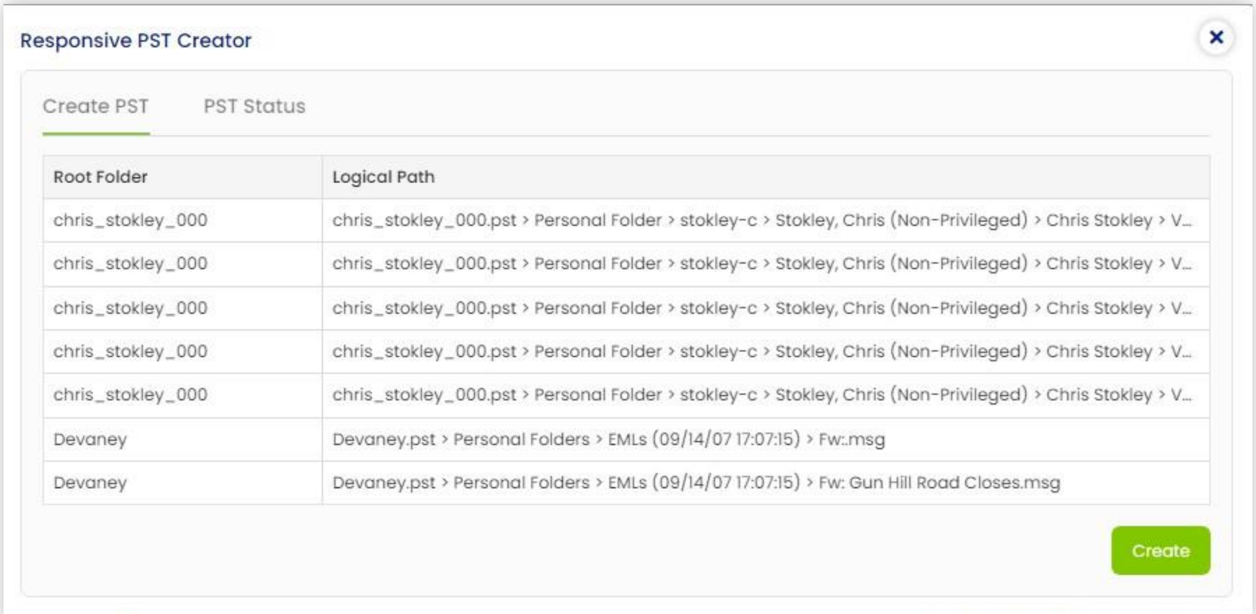


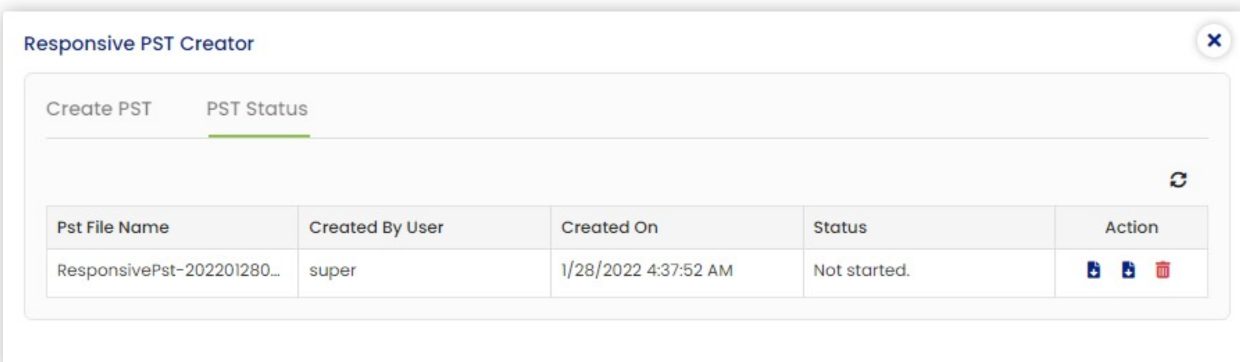
Before creating a responsive PST, ensure that Outlook is installed in machine where export service is installed.

Select the document(s) from the review page and from the menu, user can select Create Responsive PST/View status



The selected documents are queued for creating the responsive pst, the list of documents are shown in the UI, when user selects create the responsive pst is created, the status can be shown in the Pst status tab.





Once the responsive pst is created, the user have options to, download the pst, view the logs and delete the responsive pst form the Action column in the above UI.

8.2.8 Folder Panel

If there is any document present within a folder, the corresponding folder contains a check mark in the Folder Panel in the left. Also, if there is a sub-folder present in a folder in the Folder panel, the complete tree structure is visible for the folder. If the folder does not contain any folder/document, there is no checkmark for the Folder in the panel.

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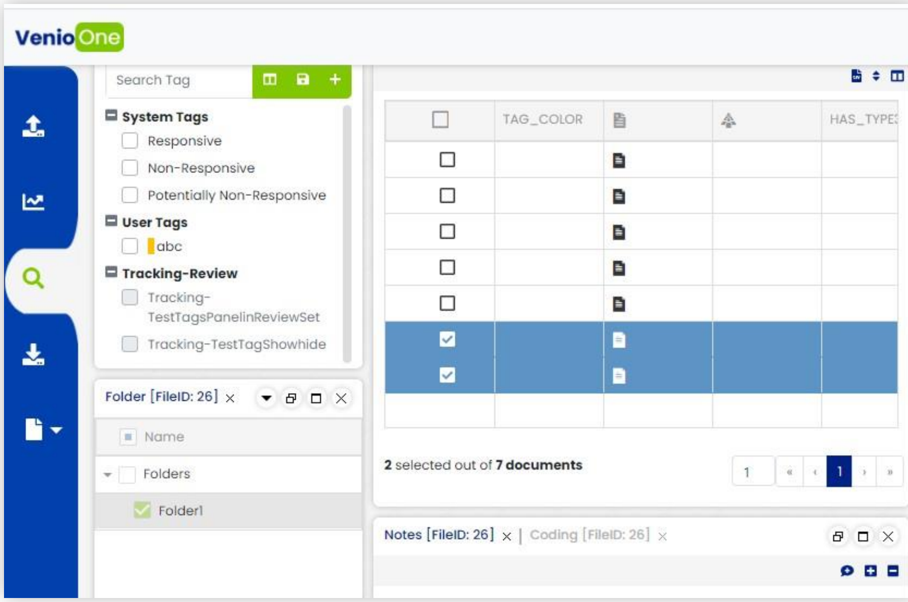
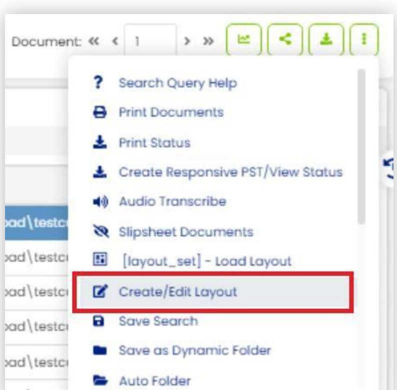


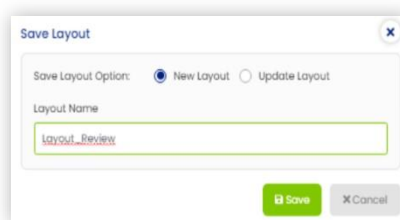
8.2.8.1 Saving and Using Layouts

If you have customized your screen layout, you may wish to save it. You can save and load multiple screen layouts for use across your matters. When a user creates/edits layout from a review page, that layout is listed while editing the user information associated with the layout from the user management.

1. On the Search Bar, click the More Options > Create/Edit Layout option

   The Save Layout dialog displays





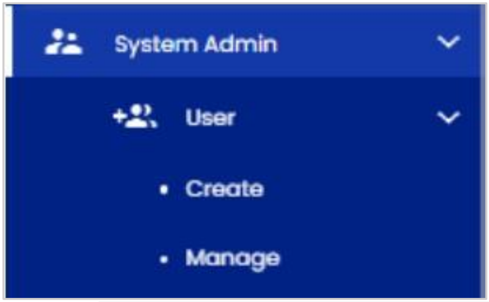
2. To save the layout, select the New Layout radio button.
3. Enter the Layout Name

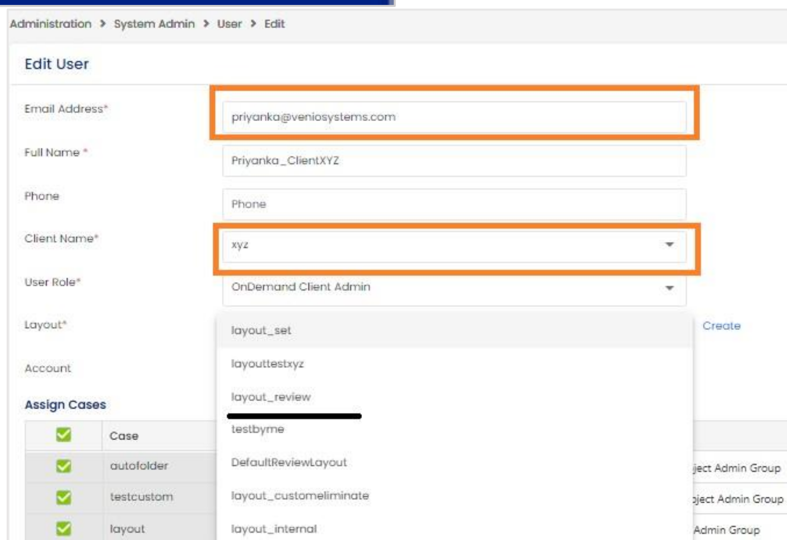
4. Click the Save button to save the new layout

NOTE: To update the layout (other than DefaultReviewLayout and Layouts associated with a client that are non-editable), load the layout to be updated as the current layout first, then go to create/Edit Layout, select the Update Layout radio button and click the Save button.

To switch layouts, click the More Options > Load Layout button. Select the Layout from the dropdown menu and click the Load button.

When an admin/internal user is editing the user information from system admin, all the layout created/edited from review (or) layout created from layout management associated to the user must be listed.

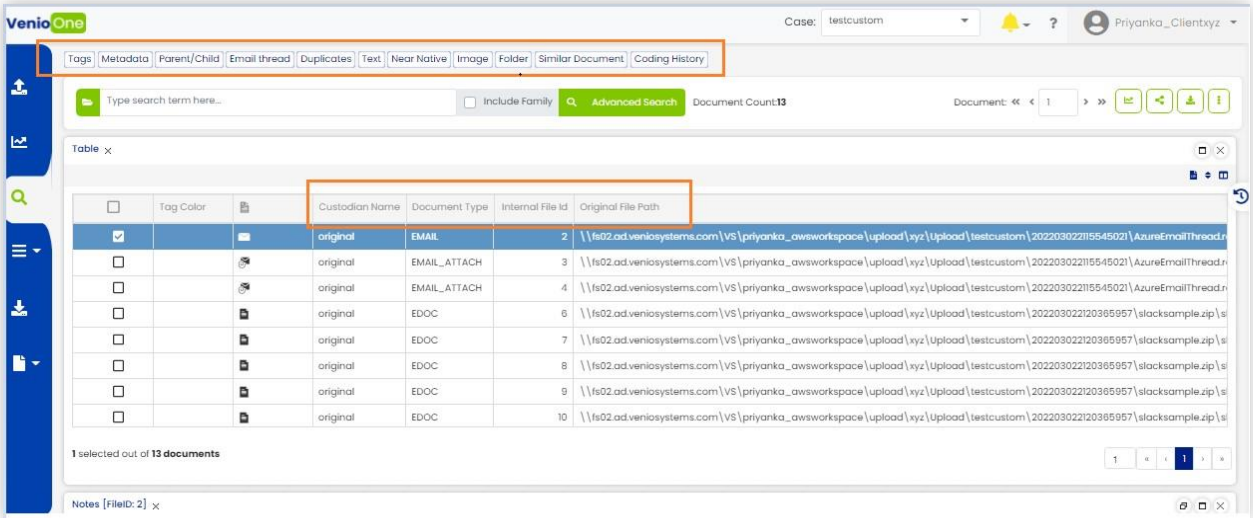


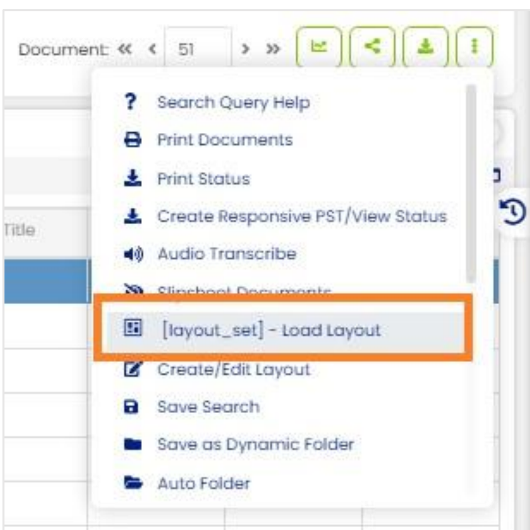


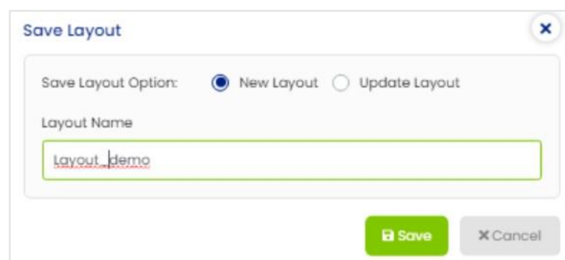
8.2.8.2 Set the created/edited layout as default

When a user loads the layout or create/update the layout from the review page, that layout should be made the default layout for the user. The layout should be the current layout in the review page i.e., when a user is logging out and logging in, then set that layout in load layout option. All the settings from the layout should be reflected/loaded in the review page.

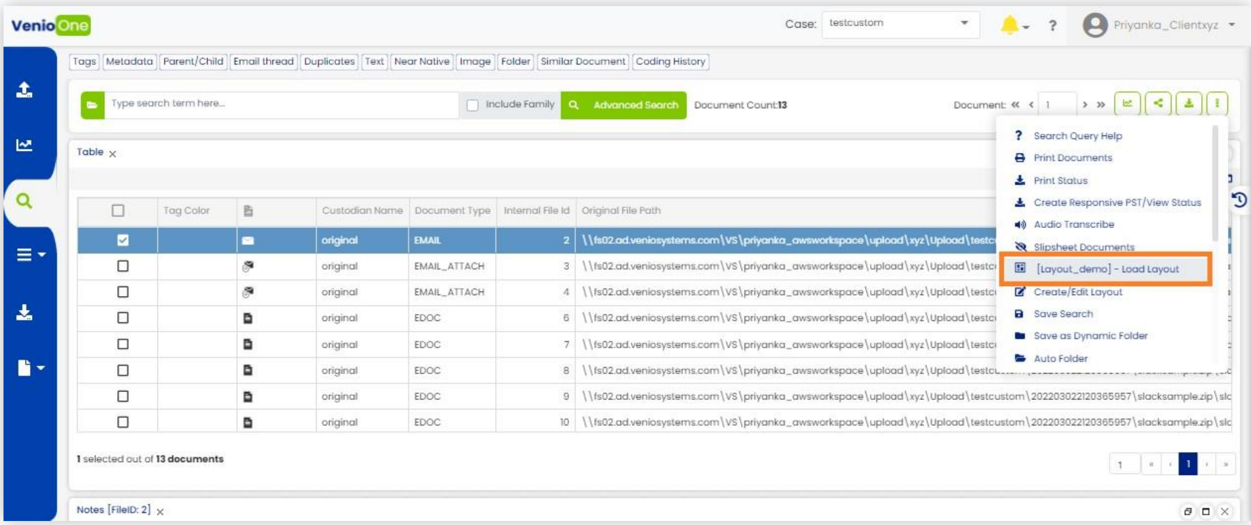
User can reorder the fields, close the layout panels, sort the fields, check/uncheck the fields to display in table panel. Save the layout.





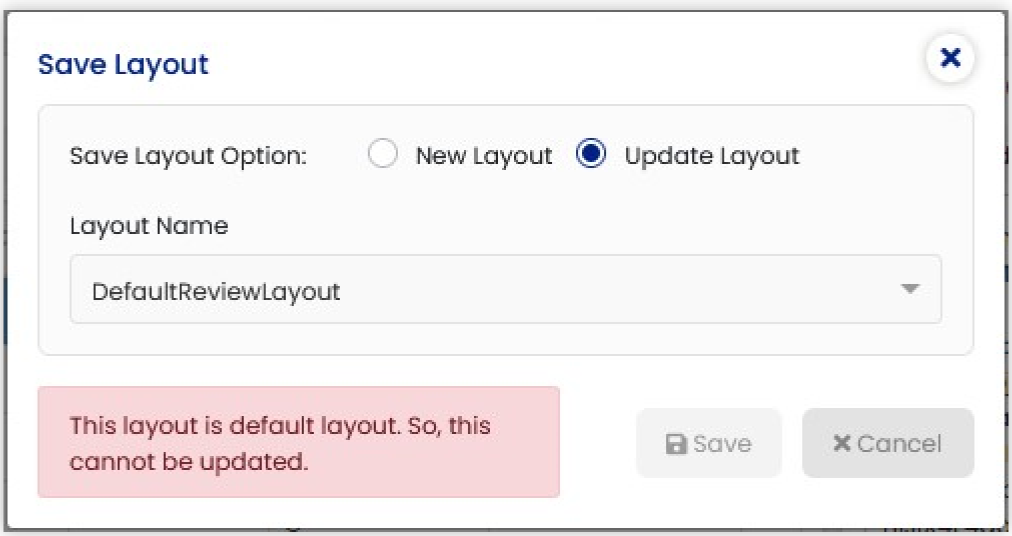


The Review page must load with the current layout and same must reflect in load layout option with all the settings done by user.



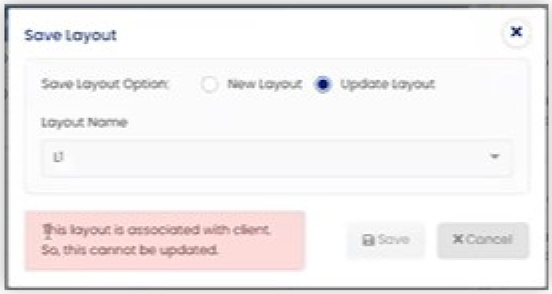
Default Layout

While editing the layouts, the Default layouts cannot be edited. If the layout being updated is a default layout, the editing is restricted and the Save button is disabled and the following message is displayed:



Client Layout

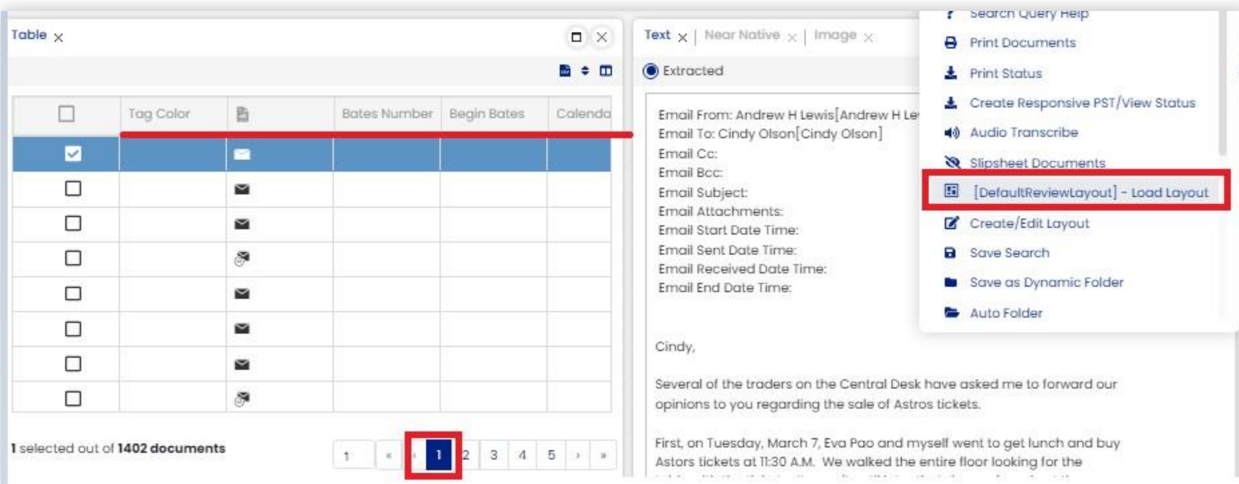
Also, you cannot edit the Client layouts. If the layout being updated is a client layout, the editing is restricted and the Save button is disabled and the following message is displayed:

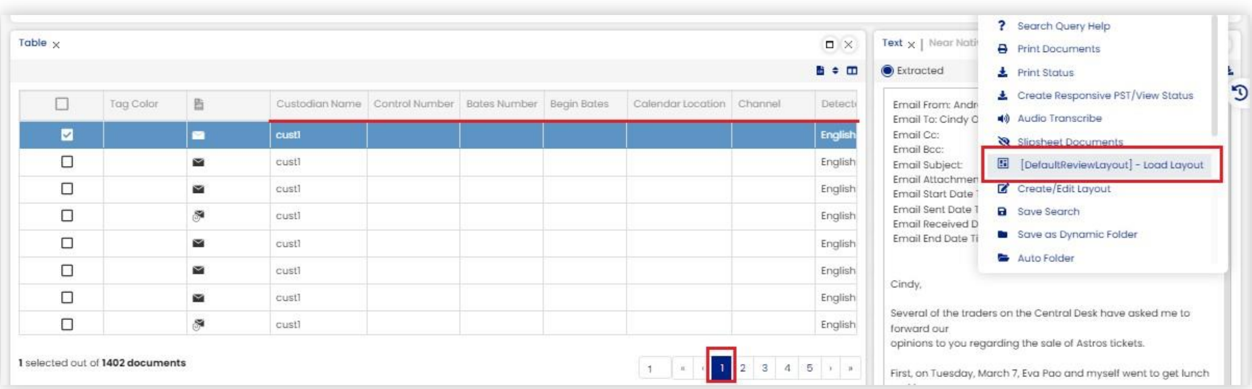


8.2.8.3 Preserve selected fields and order

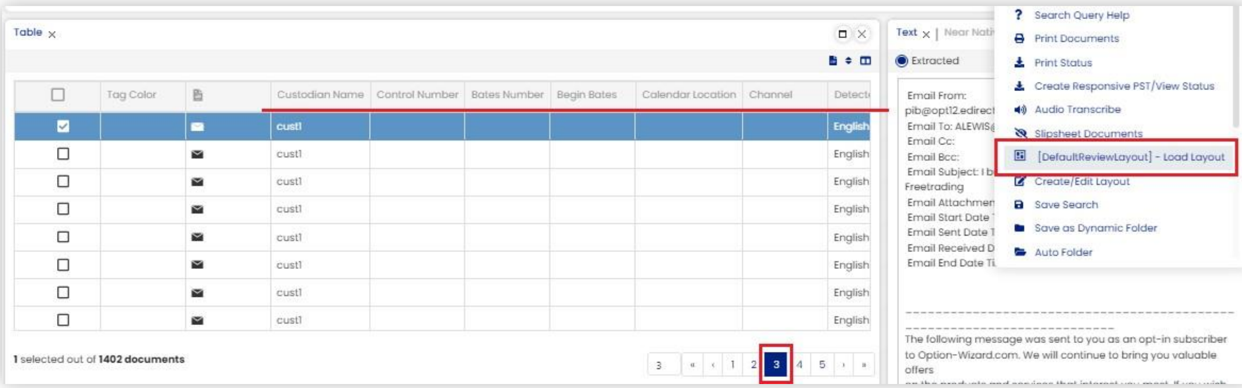
Change field order and by clicking on next pages fields should be preserved and the fields shown/hide are preserved as well.

Select a layout and reorder the fields.





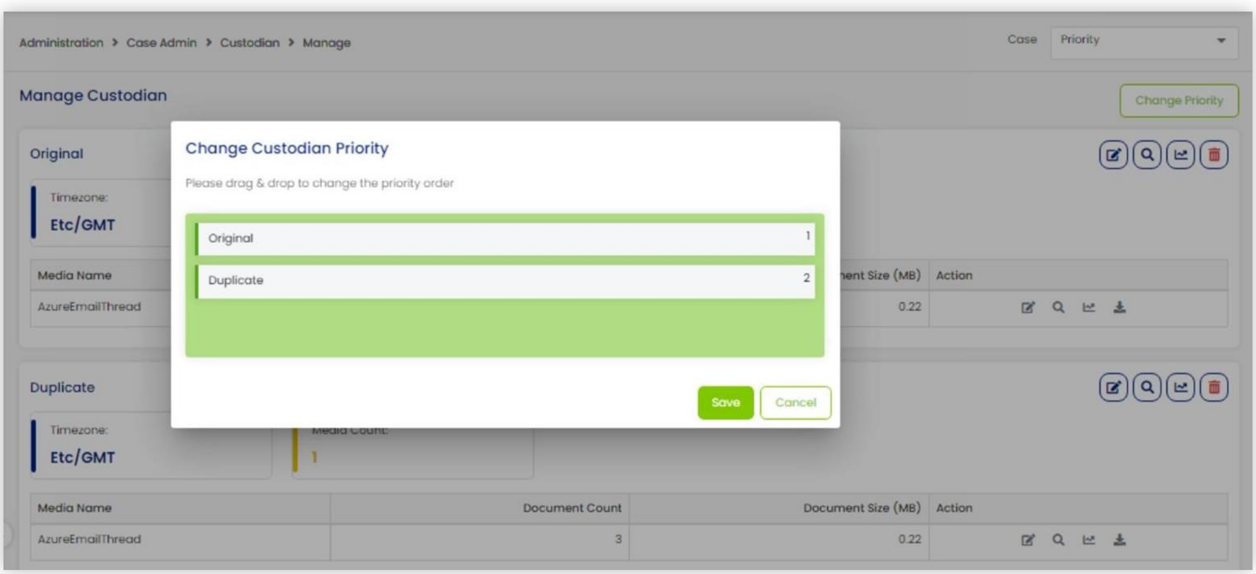
After reordering the fields try navigating to different pages, the order of the fields changed by the user should be preserved.



8.2.8.4 Change Priority

The Change Priority option in the custodian management page when clicked provides you an option to move the move the custodians up/down to set/save the priority.

Navigate to Administration > Case Admin > Custodian > Manage. Click on Change Priority.



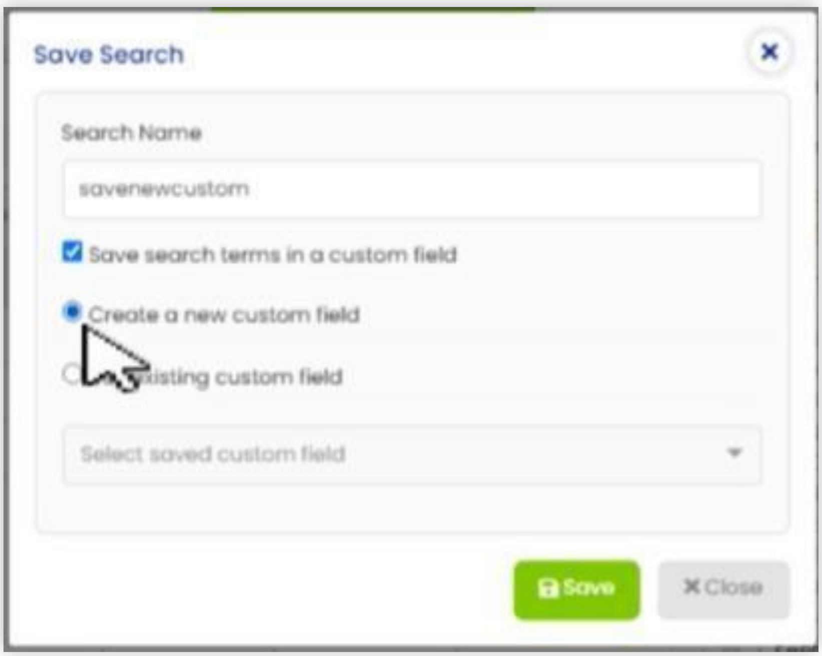
Once the priority deduplication is changed, the files based on changed custodian priority and media summary will be changed. Also, the exact same changes will be replicated in the console and vice versa. When the media is being processed, a message is displayed mentioning the restriction in saving the priority of the media.

8.2.8.5 Save Search items to Custom Fields

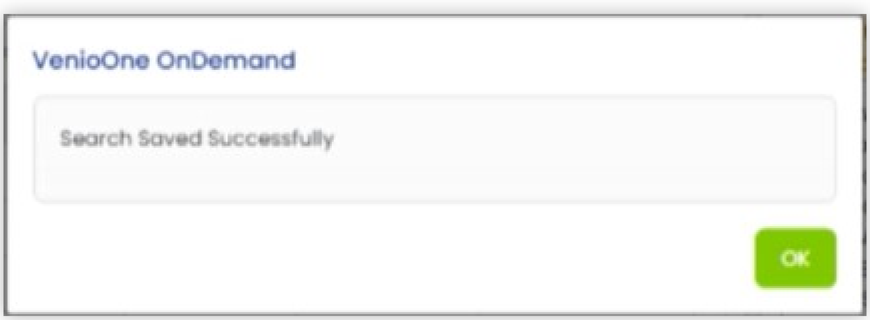
VenioOne gives you the ability to save a search with a search name so that the search can be shared with another user. You also can start a new search after the search has been executed.
Save search terms in a custom field updates custom fields with responsive search terms. The search name is used as custom field name.

To save a search result:

1. Click on the Save Search button.
2. Provide the Search Name and click the Save search terms in a custom field checkbox. Also select Create a new custom field radio button.

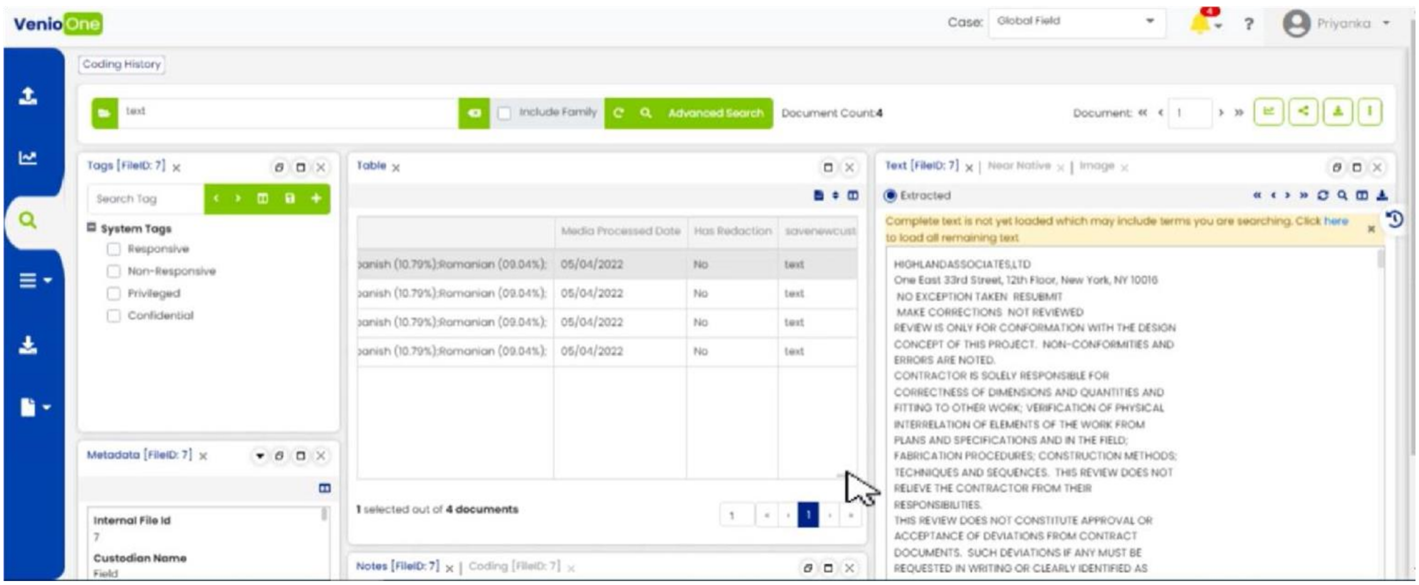


3. Click Save. A message confirming the search saved successfully appears.



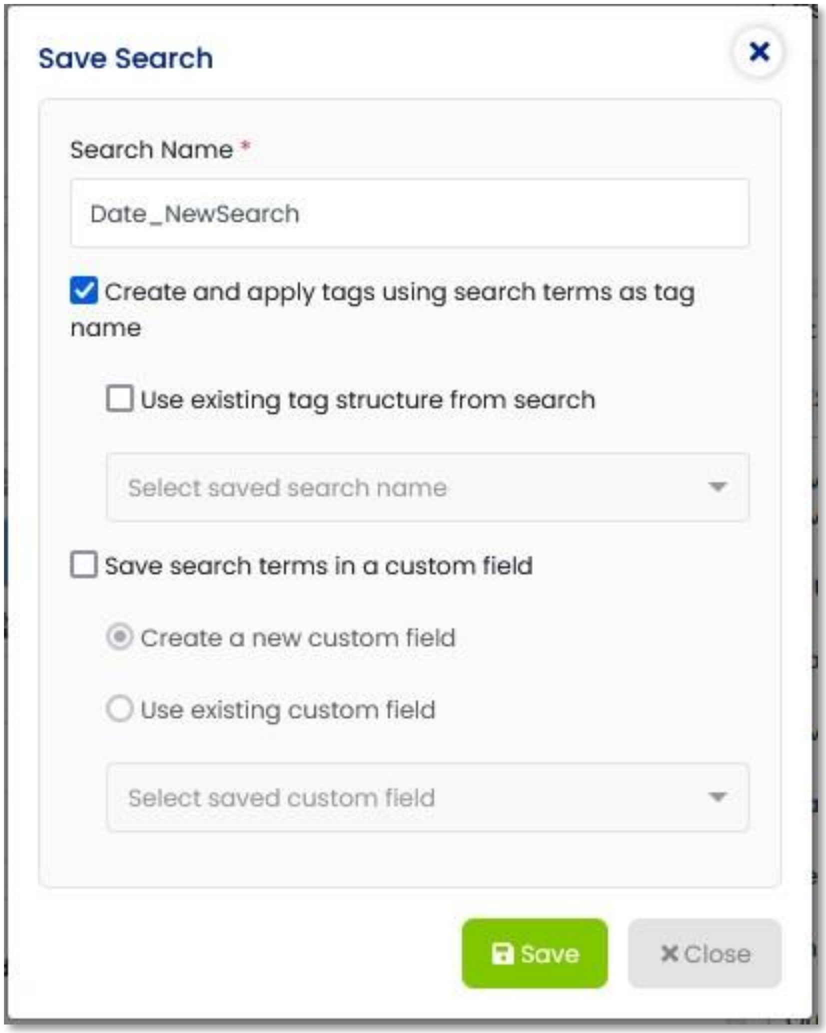
1. Now go to the Search History to see the results saved with the Search Name provided. It will be listed on the top of the grid.

8.2.8.6 Tag search terms during saved search

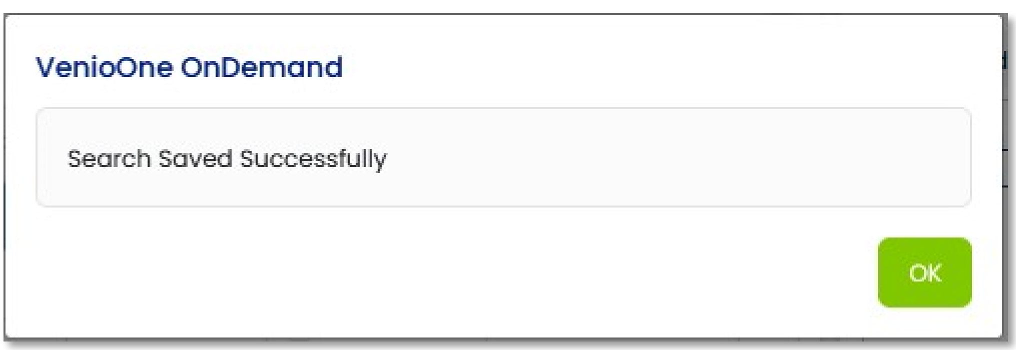


To tag search items during a saved search:

1. Click on the Save Search button.
2. Provide the Search Name and click the Create and apply tags using search terms as tag name checkbox.



3. Click Save. A message confirming the search was saved successfully appears.



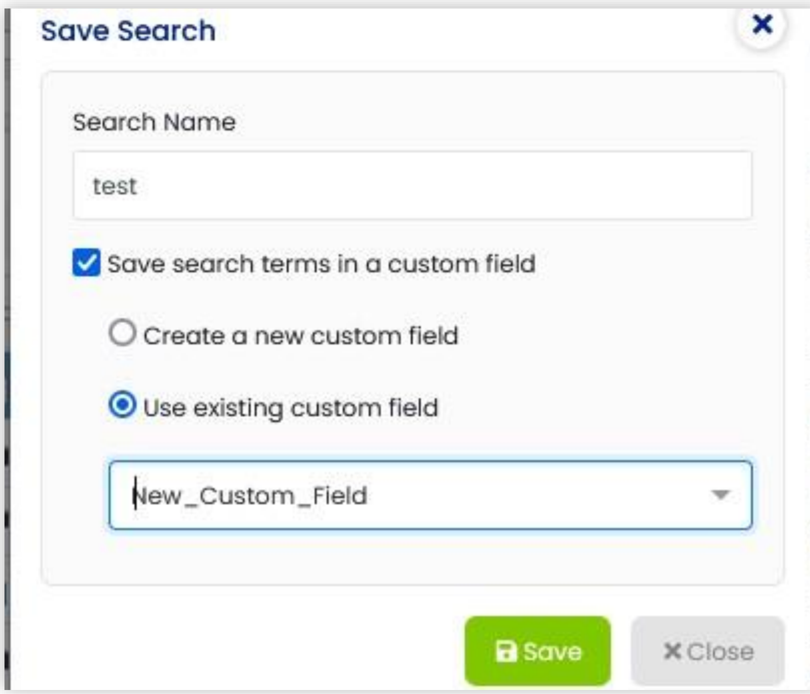
4. You can Save search by applying tags using search terms as tag name and click on Use existing tag structure from search. Select from the available drop-down list and click Save.

5. You can manage the tags from the Tag Management (Administration > Case Admin > Tag > Manage) page.

8.2.8.7 Save Search items to Existing Custom Fields

To save a search result to an existing custom field:

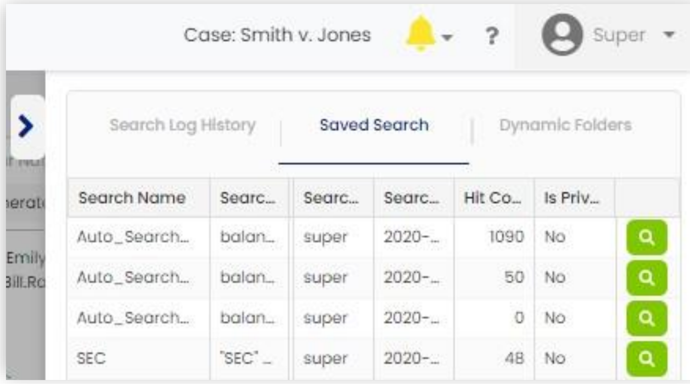
1. Click on the Save Search button.
2. Provide the Search Name and click the Save search terms in a custom field checkbox. Also select Use existing custom field radio button. Select from the available drop-down.



3. Click Save. A message confirming the search saved successfully appears. All the search documents will be appended with the new custom field.

8.2.8.8 Accessing Saved Searches

Expand the side panel on the right of the Review Dashboard to access the Saved Search tab. Click the magnifying glass Search button adjacent to the search to rerun it.

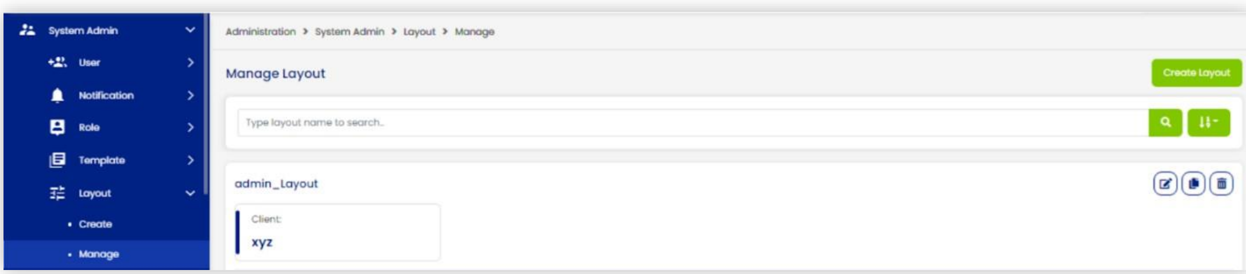


8.2.8.9 Hide Custom Fields

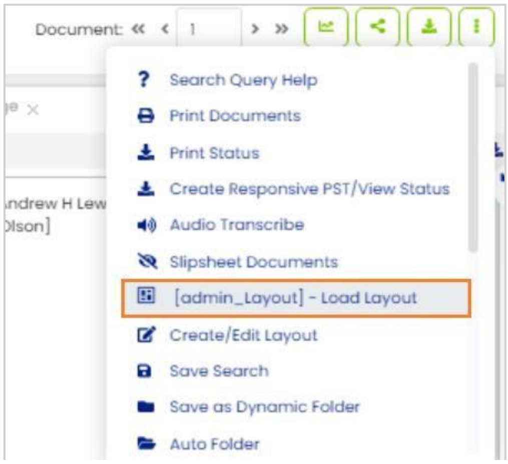
When the admin layout is loaded (may it be default to the user or user load the layout from review)in the review page, by default hide all the custom fields. However, the permitted custom fields are available in the show/hide columns list for users to select and display the desired custom field in the grid.

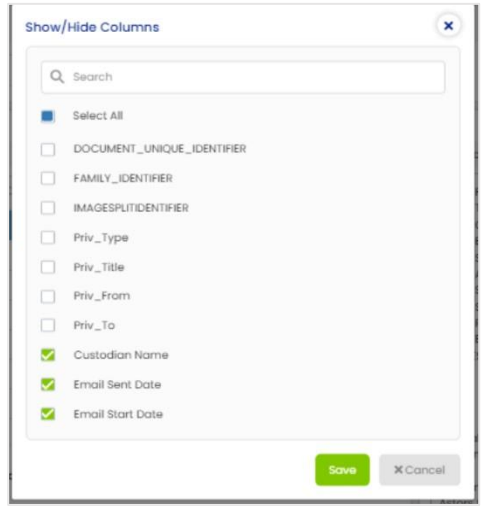
Note: User group must be selected before moving fields

1. Create a layout from admin settings



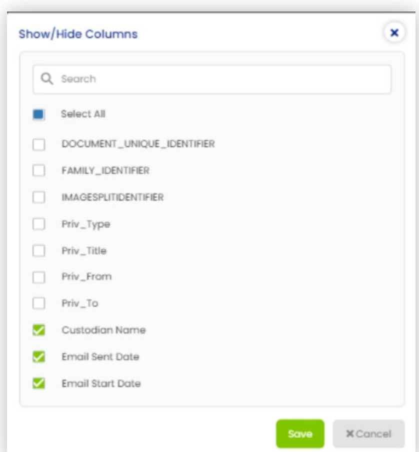
2. Load the layout in the review page. Click on show/hide option from document table, permitted custom fields should be available.





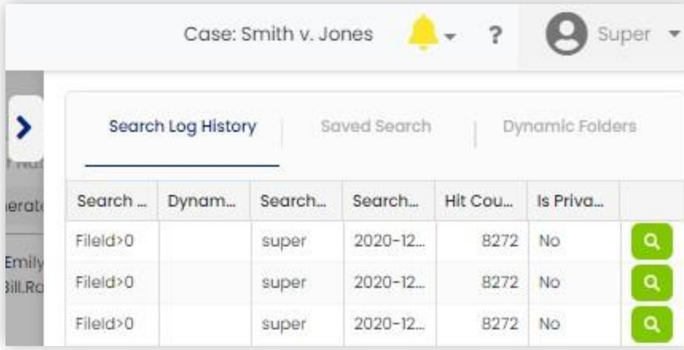
8.2.8.10 Custom field handling in layout

If none of the custom fields are selected in the document table and save the layout, it saves all the permitted custom fields in the layout and when you next load the layout, it displays all the custom fields unnecessarily.
Currently, if none of the custom fields are selected, the custom fields do not get saved in layout. Also, while loading the layout, and if the layout is created from review, only the configured custom field/s in the layout are listed.

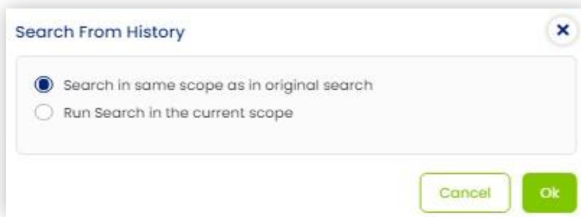


8.2.8.11 Search Log History

To view all past searches, expand the side panel on the right of the Review Dashboard and click the Search Log History tab. Click the adjacent magnifying glass Search button to rerun a search.



You will have an option to either run the search in the same scope as the original search or the current scope. Make your selection and then click the OK button.



8.2.8.12 Email Thread View

You can view email message threads only in Email Thread View.

Different types of email files are denoted by different color icons.

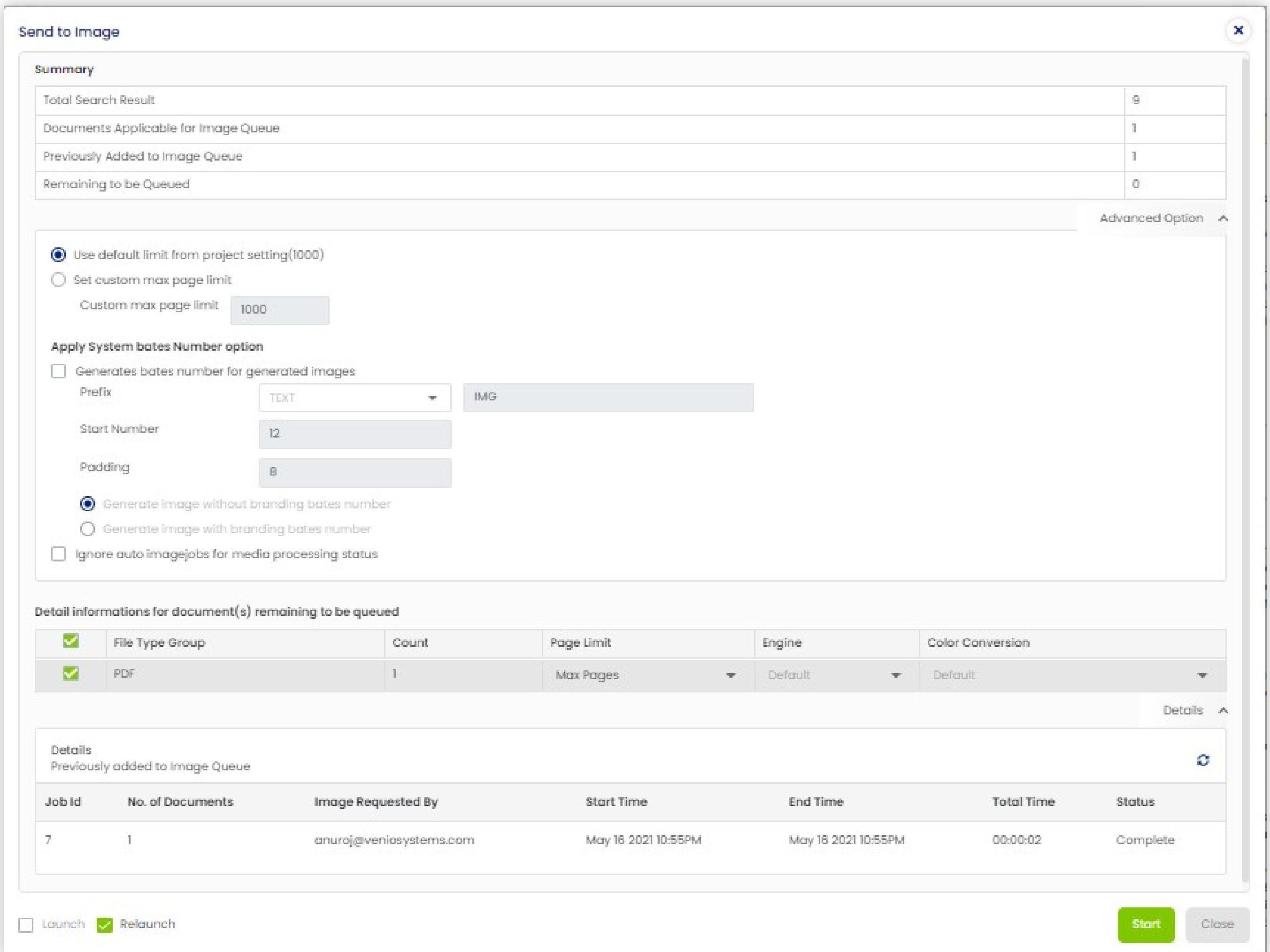
- Inclusive Email - Green Message Icon ()
- Non-Inclusive Email - Black Message Icon () for  email and email attachment ()
- Generated Missing Email - Blue Message Icon ( ) 
- System Generated/Dummy Email - Red Message Icon ( )

8.2.8.13 Send to Image

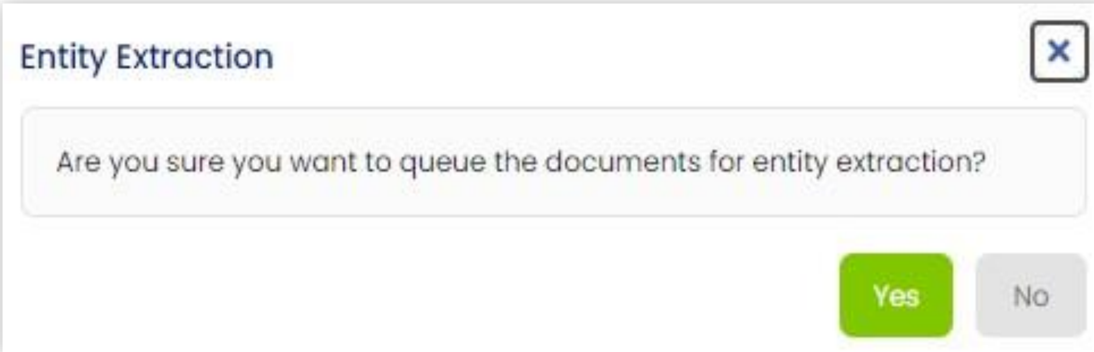
Documents can be sent to Image from search results. After running a search, select the document(s) and then click Other Options (right end of the Search Bar). Select Send to Image from the menu.

A summary of the items for Send to Image is displayed. Page Limit, Engine and Color Conversion can be selected as desired in the Document Detail table. Advanced Options include items related to the Bates Numbering and page limit. The Details section can be expanded to view previous image queue details. At the bottom left are check boxes to Launch and Relaunch.

Select Launch if it is the first time; otherwise, select Relaunch. Then, click the Start button to start the imaging process.

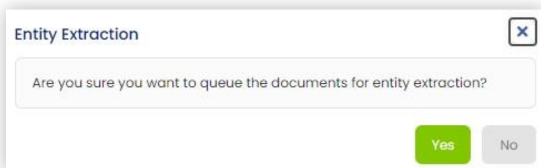


The Tiff and Tiff Pre- QC jobs will be queued and can be monitored from System Admin > Job > Status (shown below) or from the Details section in the same Send to Image dialog.



8.2.8.14 Queue Entity Extraction

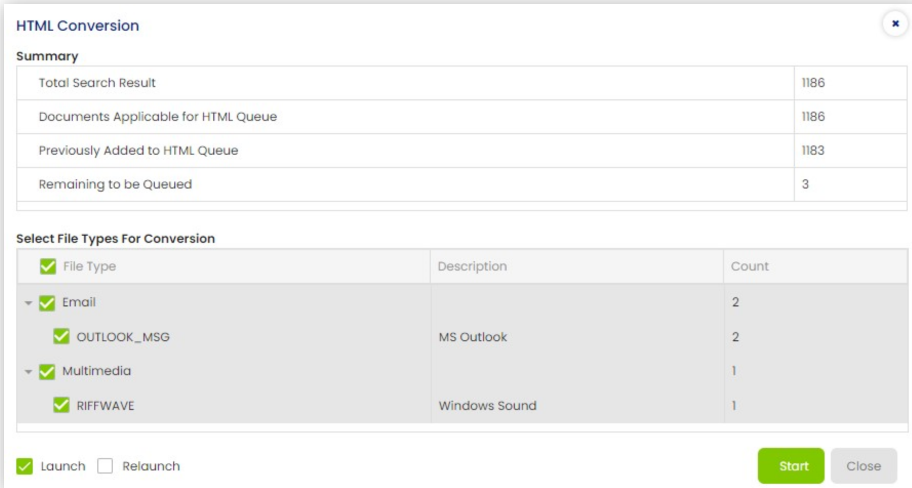
Within the Document Table, click More Options > Queue Entity Extraction to queue the entity extraction of VOD search results. Then, a message will display asking whether to queue the job. Click Yes to queue the job.



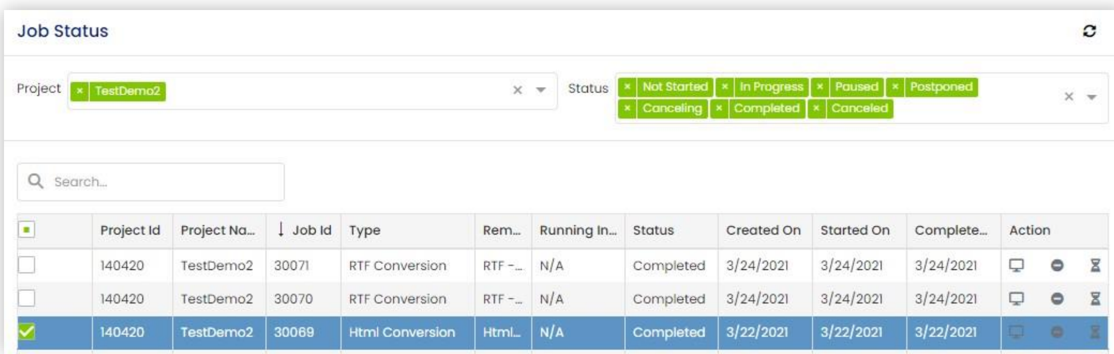
8.2.8.15 Convert to HTML

Documents can be converted into HTML from search results. After running a search, select a document (or multiple documents) and then click Other Options (3 vertical dots in the top right corner of the Document Table). Select Convert to HTML from the menu.

A summary of the items for HTML conversion is displayed. At the bottom left are check boxes to Launch and Relaunch. Select Launch if it is the first time; otherwise, select Relaunch. Then, click the Start button to start the conversion.

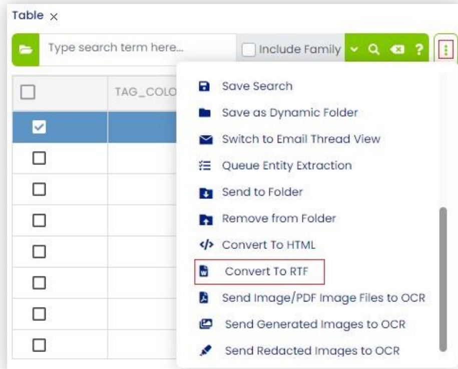


The HTML Conversion jobs will be queued and can be monitored from System Admin > Job > Status.

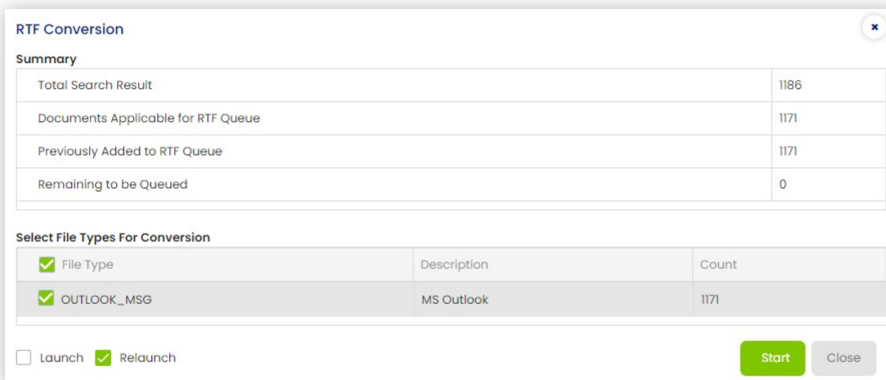


8.2.8.16 Convert to RTF

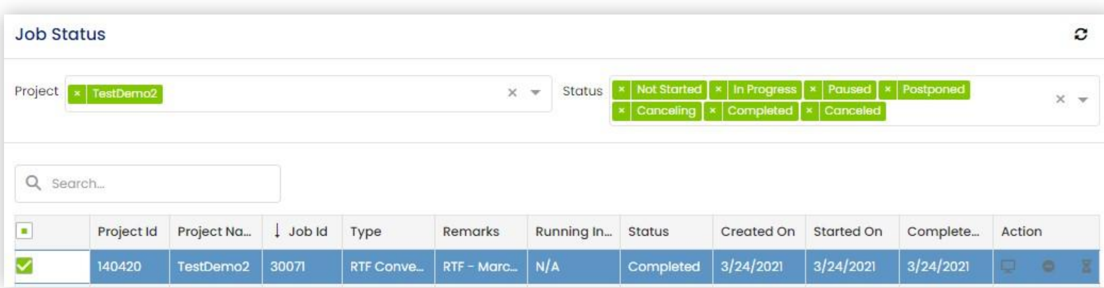
Documents can be converted into RTF from search results. After running a search, select a document (or multiple documents) and then click Other Options (3 vertical dots in the top right corner of the Document Table). Select Convert to RTF from the menu.



A summary of the items for RTF conversion is displayed. At the bottom left are check boxes to Launch and Relaunch. Select Launch if it is the first time; otherwise, select Relaunch. Then, click the Start button to start the conversion.



The RTF Conversion jobs will be queued and can be monitored from System Admin > Job > Status.



8.2.8.17 Creating Slipsheets from Console

Within the Document Table, you may create slipsheets to replace the document images for either selected documents or all documents. You may either enter text and/or fields or use an image. You may also use a Slipsheet Template if one has been made available to you by your administrator.

1. Click the Other Options button and then click Slipsheet Documents.

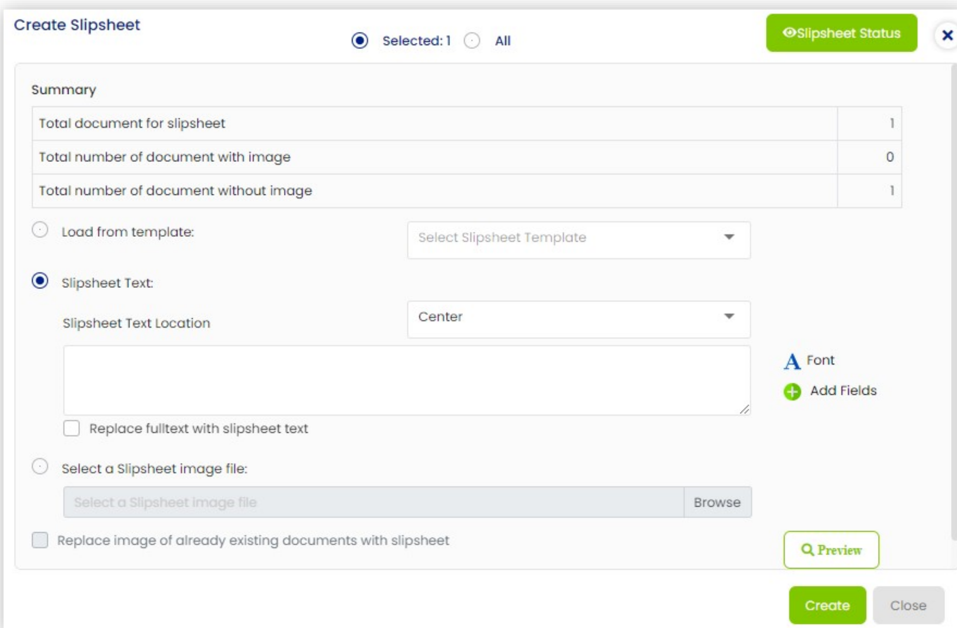
The Create Slipsheet dialog displays.

Click either the Selected or All radio button to choose which images will be replaced with slipsheets.

The Summary section will update with the number of documents for which slipsheets will be added.

Choose from the following radio buttons:

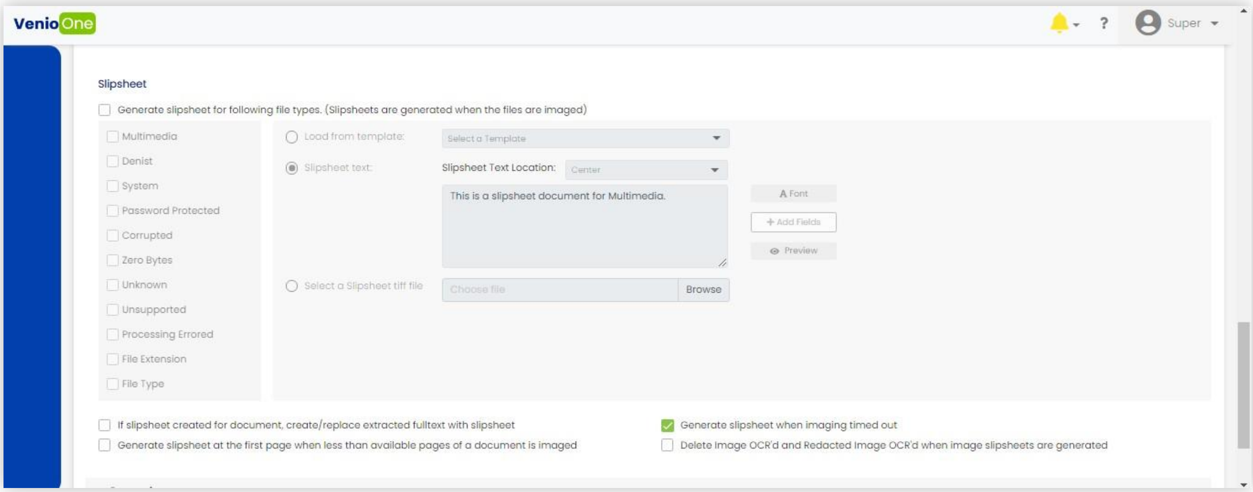
- Load from Template – Select template from drop-down list
- Slipsheet Text – Choose the location, text, and fields to be included
- Select a slipsheet image file – Use the Browse button to go to the location of the file



Use the Preview button to review your slipsheet(s) prior to creation.
If using Slipsheet Text option, you may check the option to Replace fulltext with slipsheet text. If there are existing images of documents already, you may select the option to Replace images of already existing documents with slipsheet. Click the Create button to generate the slipsheets.

8.2.8.18 Creating Slipsheets from Web

In the SlipSheet window, you can generate a slipsheet for specific file types. The slipsheets are generated when the files are TIFFed.



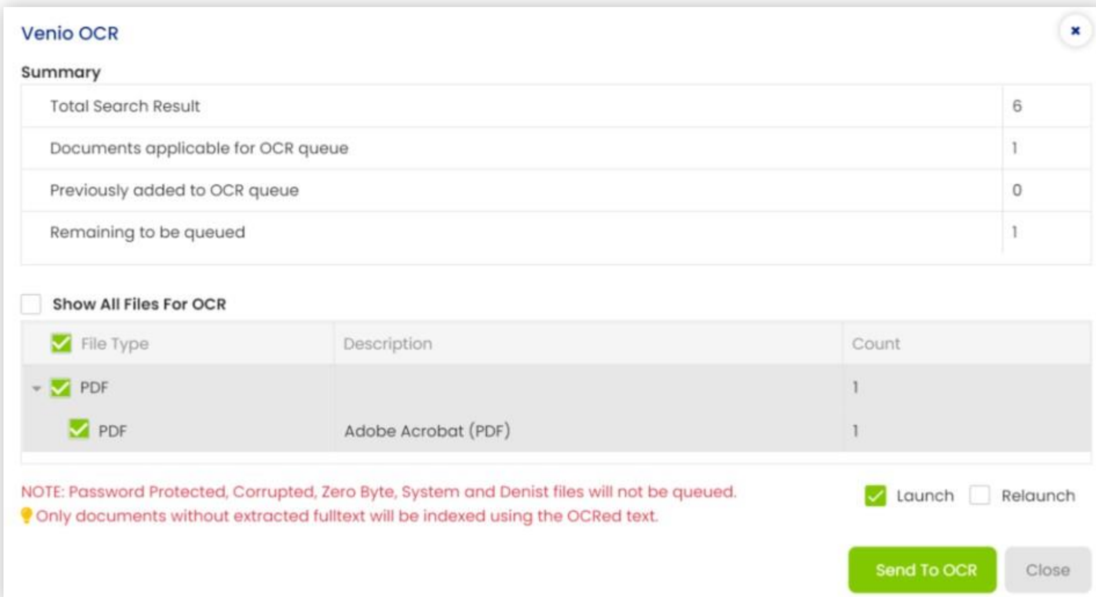
1. Check the Generate slipsheet for the following types of file check box to generate a slipsheet for the specified type files when the files are TIFFed by TIFF engine.
2. Check the any File type checkbox to use a place holder.
3. Select the Load from template radio button to display the placeholder text/TIFF placeholder from the template.
4. Click the drop-down menu and select a slipsheet template.
5. Select the Slipsheet text radio button to display the placeholder text in the slipsheet.
6. Click the Font link to select font for fields or text to be printed in slipsheet. Click the Add Fields links to select a field from the drop-down and add to the place holder text.
7. Click the Preview to view the slipsheet which would be created.
8. Click the Select a Placeholder TIFF file radio button to browse for a placeholder TIFF file from the client desktop location to use as a slipsheet.
9. Check If a document is slipsheet, create (replace if already exists) with slipsheet text check box to show the placeholder text in the viewer.
10. Check Generate slipsheet at the first page when less than available pages of a document is TIFFed to generate the slipsheet on the first page.
11. Check Generate slipsheet when TIFFing timed out to generate slipsheet for files for which TIFFing has timed out.
12. Check Delete TIFF OCR’d and redacted Tiff OCR’d text when Tiff sheets are generated to delete OCR’d TIFFs.

8.2.8.19 OCR Image/PDF Documents

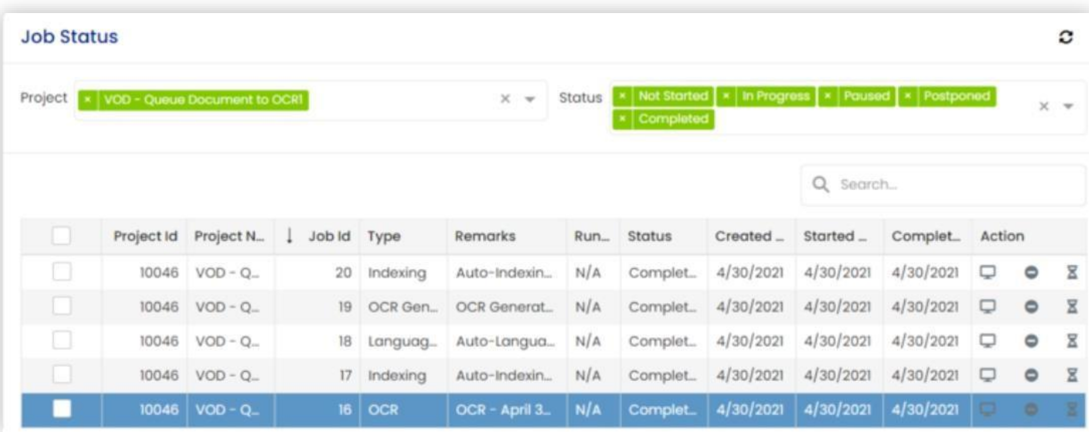
Venio

Documents can be sent to the OCR engine from the search results. After running a search, select document(s) and then click the Other Options button (right end of the Search Bar). Select Send Image/PDF Image Files to OCR from the menu.

A summary of the items to be OCRed is displayed. At the bottom left are check boxes to Launch and Relaunch. Select Launch if it is the first time; otherwise, select Relaunch. Then, click the Send to OCR button to send the files to the OCR engine.



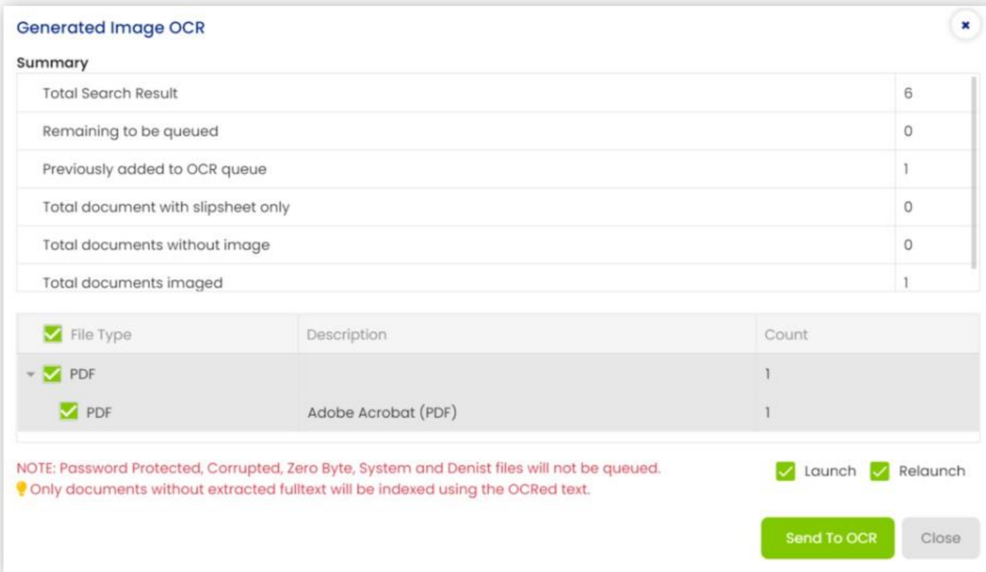
The jobs will be queued and can be monitored from System Admin > Job > Status.



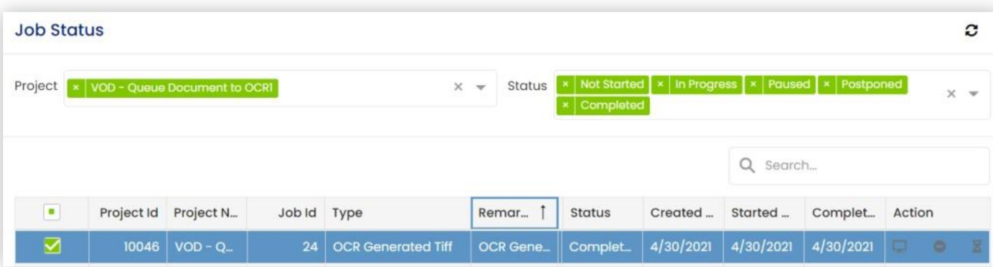
8.2.8.20 OCR Tiff Documents

Documents can be sent to the OCR engine from the search results. After running a search, select the document(s) and then click the Other Options button (right end of the Search Bar). Select Send Generated Images to OCR from the menu.

A summary of the items to be OCRed is displayed. At the bottom left are check boxes to Launch and Relaunch. Select Launch if it is the first time; otherwise, select Relaunch. Then, click the Send to OCR button to send the files to the OCR engine.



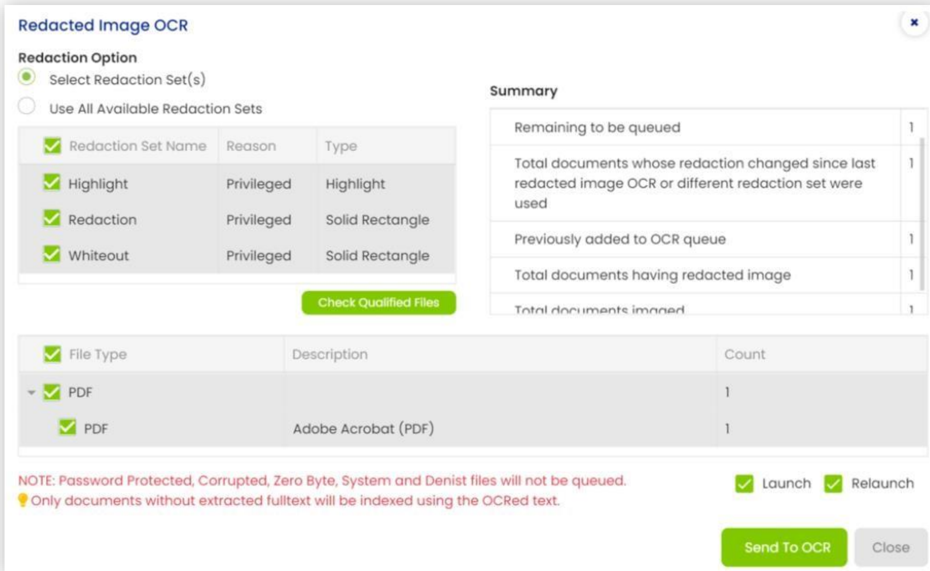
The jobs will be queued and can be monitored from System Admin > Job > Status.



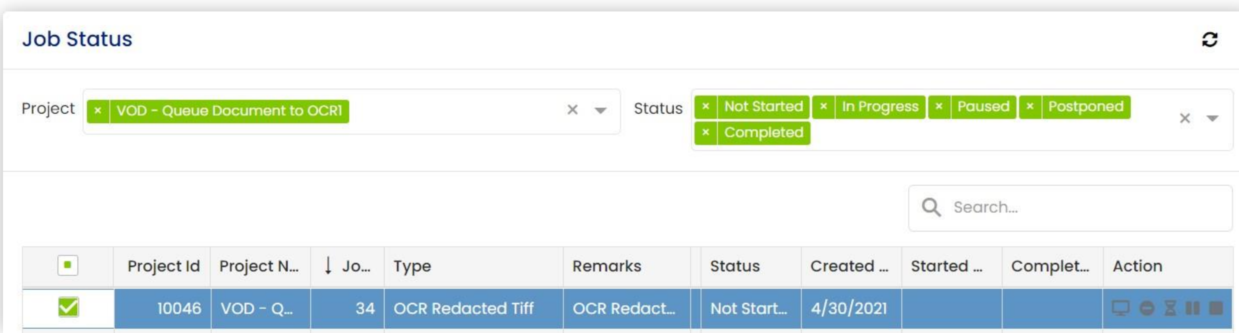
8.2.8.21 OCR Redacted Documents

Documents can be sent to the OCR engine from the search results. After running a search, select the document(s) and then click the Other Options button (right end of the Search Bar). Select Send Redacted Images to OCR from the menu.

A summary of the items to be OCRed is displayed. At the bottom left are check boxes to Launch and Relaunch. Select Launch if it is the first time; otherwise, select Relaunch. Then, click the Send to OCR button to send the files to the OCR engine.



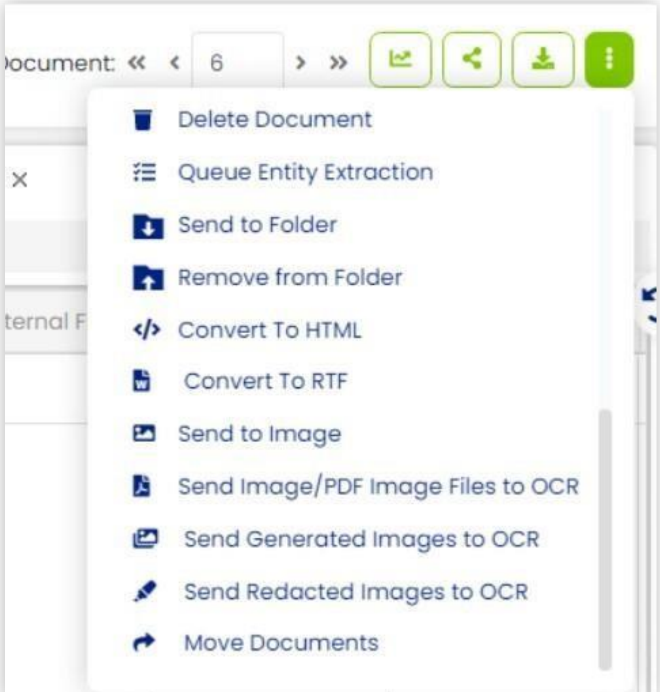
The jobs will be queued and can be monitored from System Admin > Job > Status.



8.2.8.22 Move Document

After processing documents in different media, you have an option to move documents from one media to another. While choosing the document(s) to move, Source should be parent, but the destination can be a parent or child or nested child. After successfully moving the selected document, all the hierarchy will be moved making the source and destination a single family.

1. Go to the Review page. Select parent document/s not within the same family and click on More Option context menu.

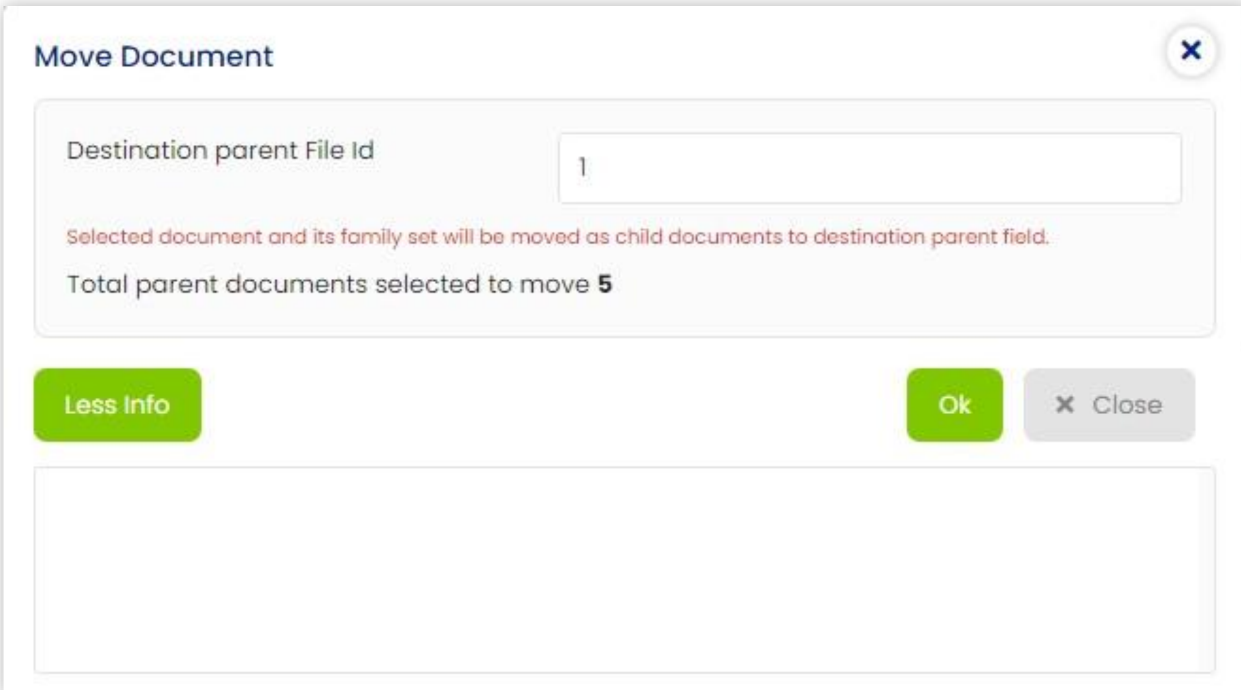


2. Click on Move Documents

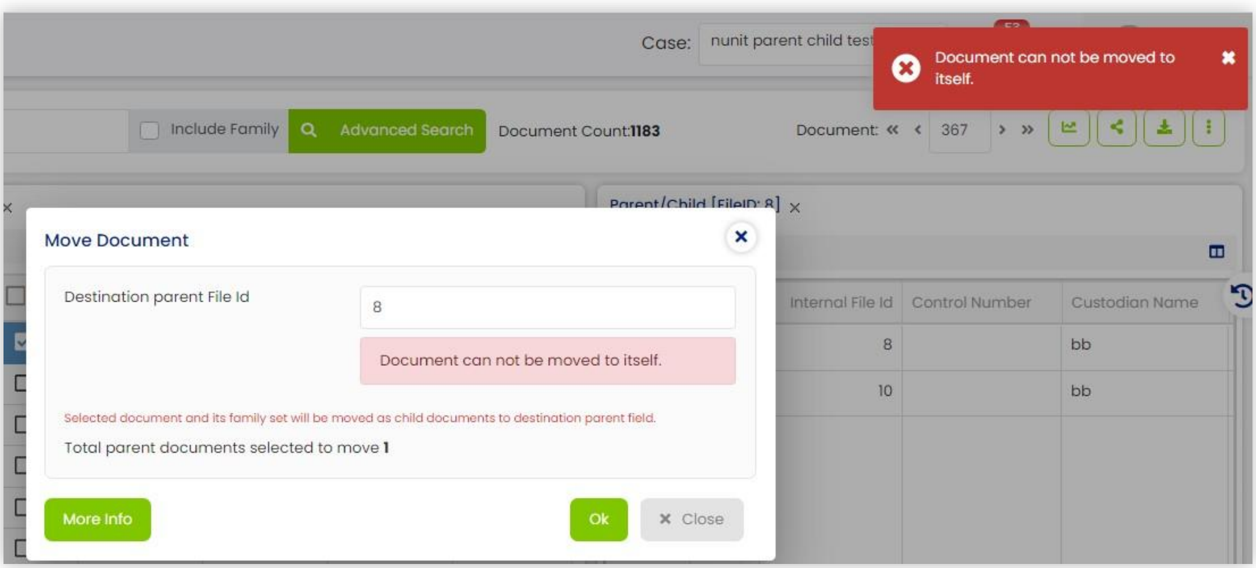
   Pop up to enter field will be displayed.

3. Enter valid field ID for the document to be moved under.

   If the provided Field ID is valid, a success message is displayed, and the moved document is moved within the hierarchy of the destination document.



4. If an invalid file id is entered (file id from the same family, selected file not being parent file, the moving file id itself, etc.), then a corresponding error message will be displayed.



8.3 Review Module Left Section

The left panel of the Review module consists of the Tags panel at the top and other metadata panels at the bottom.

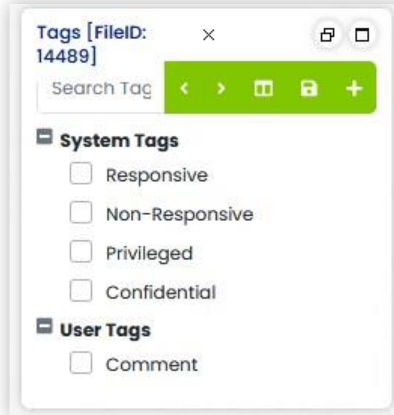
8.3.1 Tags Panel

The Tags panel shows all tags available and a few additional options for working with tags, as well as a tag search field.

The arrow buttons may be used to save tags and move to the previous or next file, as well as mark the file as reviewed.

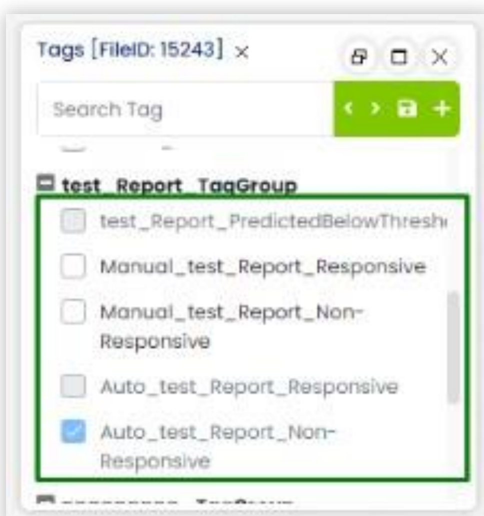
The Save Tag(s) button simply saves the tags applied.

Prior to saving changes, the tag color will be changed to green for tags being added and red for tags being removed.



Use the following options to work with tags:

- Navigate documents by clicking the Save Tag(s) and Move Next button ( ) or Save Tag(s) and Move Previous button. ( ). This will also mark documents as reviewed.
- View the current File ID number at the top of the list of tags.
- Search by Tag ID by typing in the tag search field.
- Apply tags by selecting the document from the document table, checking the tag(s), and then clicking the Save Tag(s) button ( ).
- Use the Create New Tag button ( ) to create new tags. See the prior section on Tagging for more details.



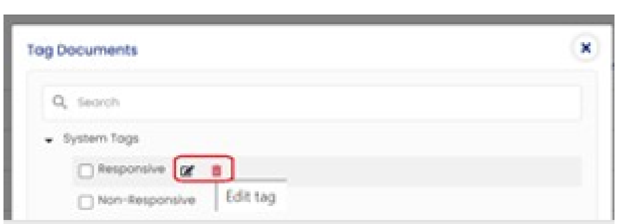
NOTE: There are the CAL-specific tags that appear when a CAL review set is created. The Auto tags are used by VOD's CAL engine when predicting and should never be used by reviewers. Manual tags display only if you have permission to use them for tagging/untagging.
Tags comment - User can view the tags/comments entered by other users for a specific case in the Tags section for the specific tags.

After entering the comments, the user must click on Save icon to save the comments to be viewed by another user, else it does not gets saved and the tag is not updated with the changes. When the comment is saved, a success message pops up.

8.3.2 Edit and Delete Tag

Edit and Delete icon links are available in the tag hierarchy in both review and analyze tag tree. The link is visible when the use hovers mouse on the tag

Note: Saved Search and Review Tags are restricted for **Edit** and **Delete** Operation.



You can click Edit to edit tags and Delete to delete the tags.

8.3.3 Metadata Panel

The Metadata panel displays the metadata details of the emails and documents.

Use the Show/Hide Columns button to adjust what is displayed within the panel.

8.3.4 Parent/Child Panel

The Parent/Child panel displays the documents that have a relationship with the selected document.

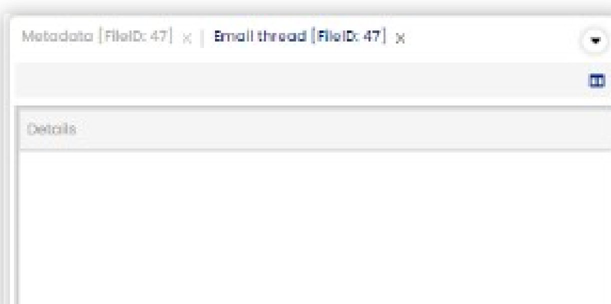
Click the View button (View)to view either the parent or child.

Use the Show/Hide Columns button to adjust what is displayed within the panel.

8.3.5 Email Thread Panel

The Email Thread panel displays all documents within the Email Thread of the selected document, if any exist.

Use the Show/Hide Columns button to adjust what is displayed within the panel.

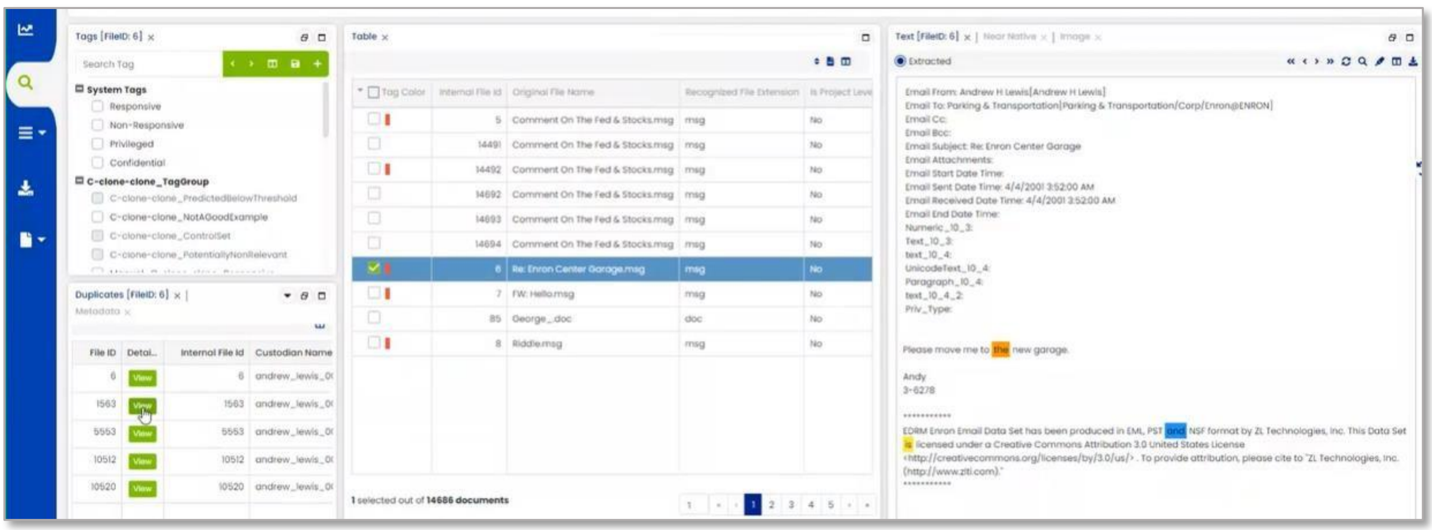


NOTE: In order for email threads to display, the email threading process must have been run within the Desktop Console.

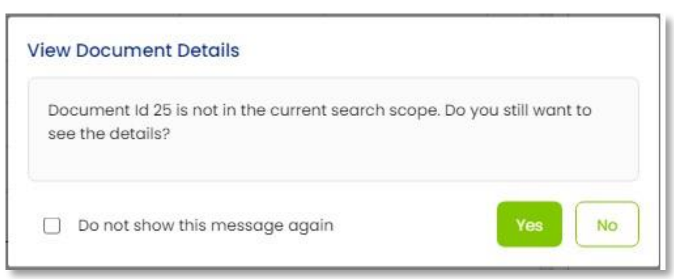
8.3.6 Duplicates

Displays all the duplicates of a selected document.

To view a duplicate, click on any document in the duplicate panel.
A tag on duplicate and the primary document in the document table indicates that it is a duplicate and by clicking on View in the Duplicates panel you can view the details of the selected document.



If the document is outside of the review set scope, an error message appears.



You can click Yes to see the details.

You can also click on the check box “Do not show this message again” to skip the warning message.

After performing a search operation, the logged in user can view similar documents of the selected document from the list view of search results. The user can use the feature ‘Similar’

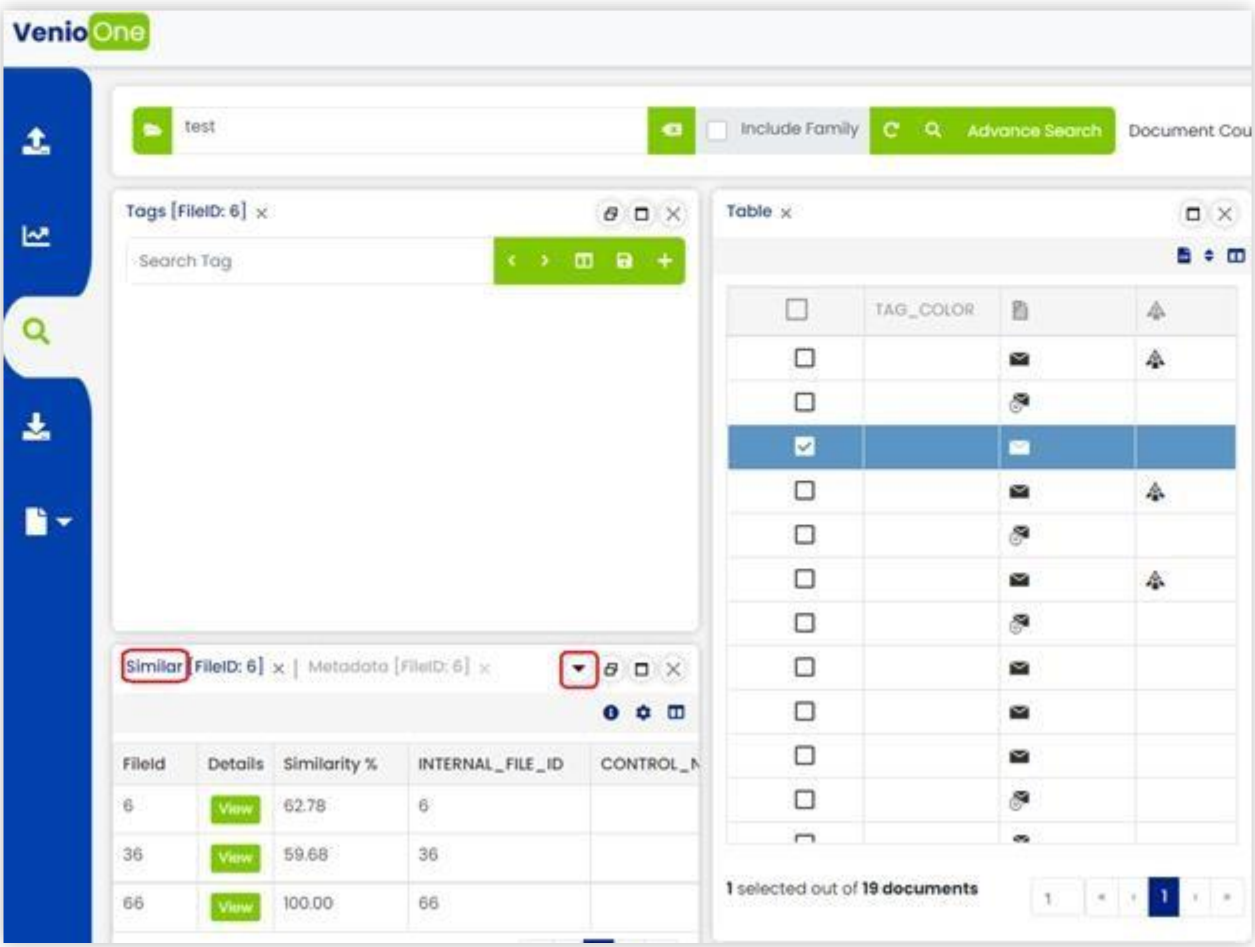
(View Similar Documents) available in the review module to view the similar documents according to the frequency of texts contained in the fulltext of documents. Hence, any document with no fulltext will not be suitable for this feature. For this feature to work, the 'Index Fulltext' setting of the project should be enabled.

Note: To enable "View Similar Documents", the control setting key VIEW_SIMILAR_DOCUMENTS should be enabled (enabled by default) which is discussed in section 21.1 Control setting keys for Console and Web Application of the document 'VenioOne Console Admin Guide'.

8.3.6.1 View Similar Documents

To view the similar documents, follow the steps given below:

2. Navigate to Review Page.
3. Perform Search in the search box to list search results.
4. Click Similar on the left panel.

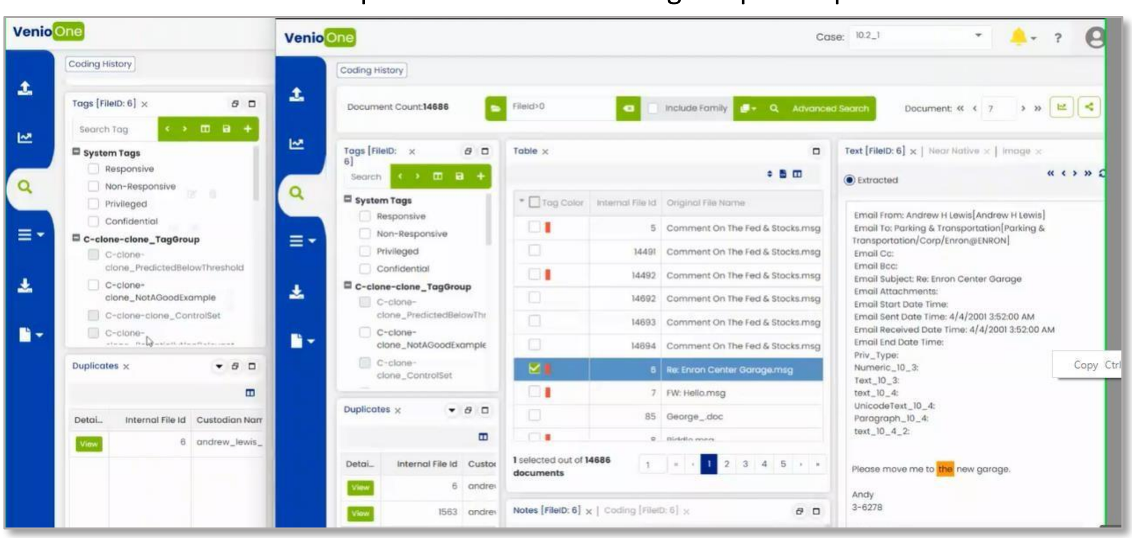


The user can view the similar documents results with default Similarity Score Percentage=50% and default Search Scope as All Documents in Project and can be changed from the settings icon.

8.3.6.2 Document Handling in Duplicate Panels

The restricted documents are handled differently in the duplicate panels pane. The document which is not shared or having restricted access is not visible in PC, duplicate and email thread panel even though the document is available in family, duplicate and within the same email thread of the selected document. The unrestricted documents can only be accessed by the user with Super User rights.In the duplicate panels, documents are handled in the following ways:

- Handling on document restriction - If only fileId 1 is restricted to the user, the user can view the unrestricted duplicate document through duplicate panel's view link.



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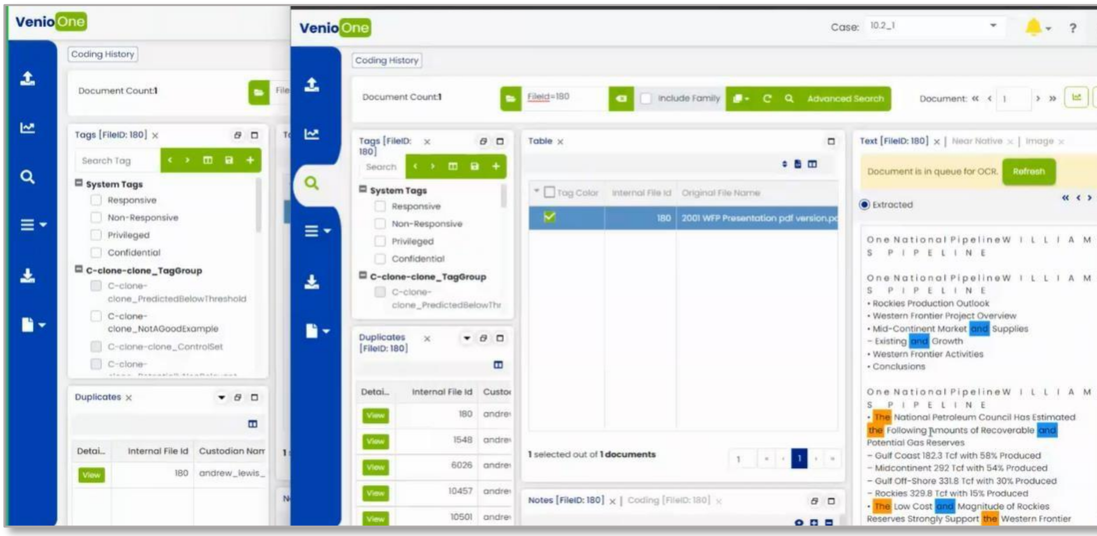
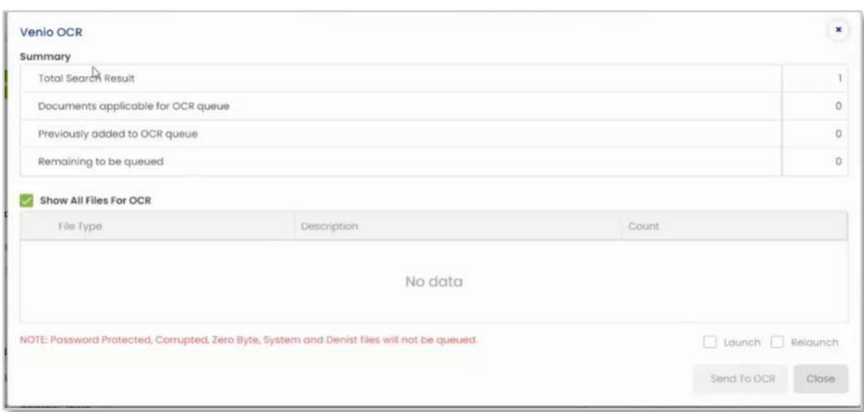
- Handling on document collaboration/share- If only fileId 1 is shared to internal/external user, the user can view the unshared duplicate document 2 through duplicate panel's view link



- Handling for different action in review page - If the current search result contains only original document and user viewed the duplicate document 2 through the view link in the duplicate panel, the actions such as send to tiff, send to OCR, send to tiff OCR etc. are not applicable since document 2 is not selected in the grid and those action are mainly for the selected document in the document table/grid.

Venio OCR – The user cannot Launch, Relaunch or send to OCR.



Send to Image - The user cannot Start Launch, or Relaunch.

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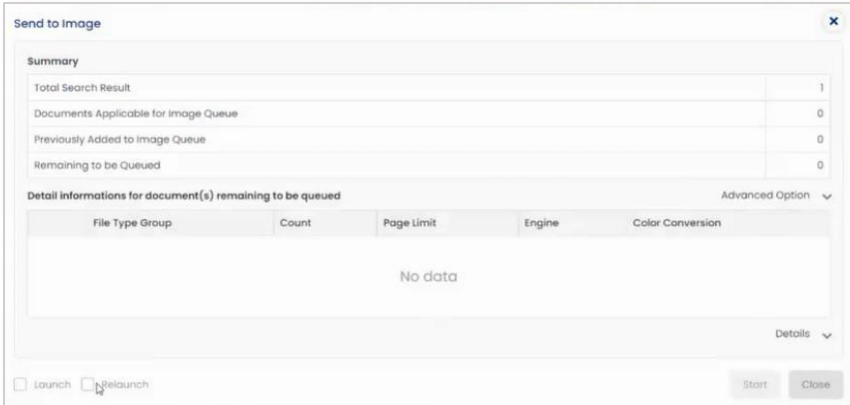
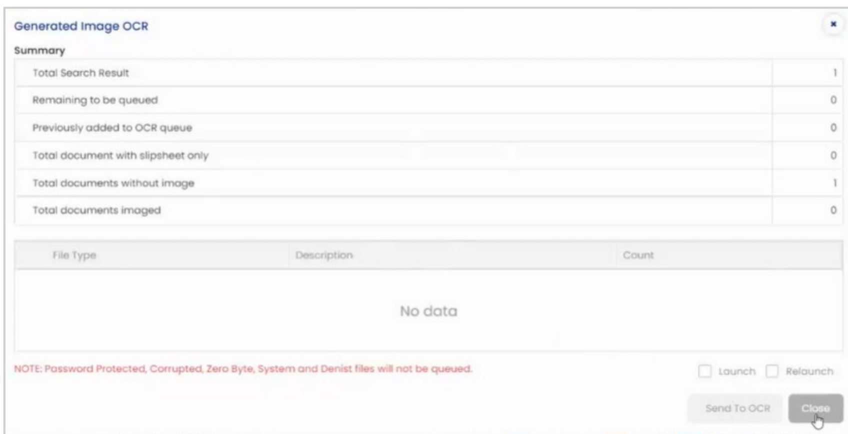
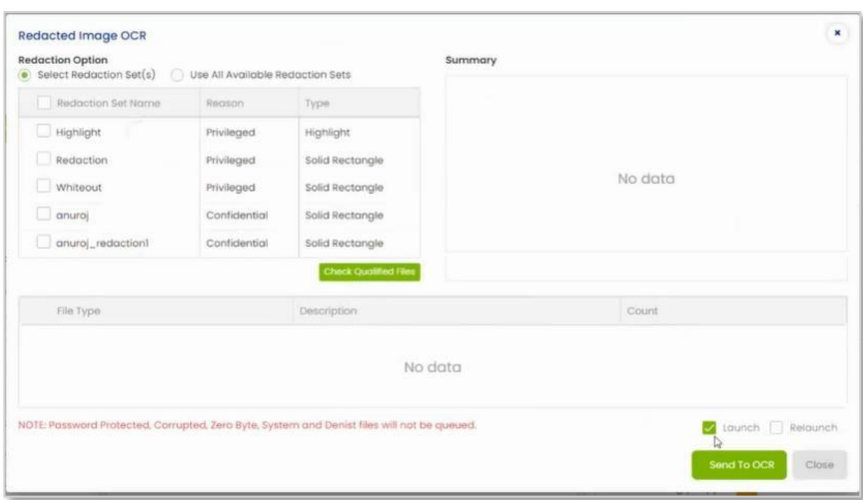


Generated Image OCR - The user cannot Send to OCR, Launch, or Relaunch.



Redacted Image OCR -

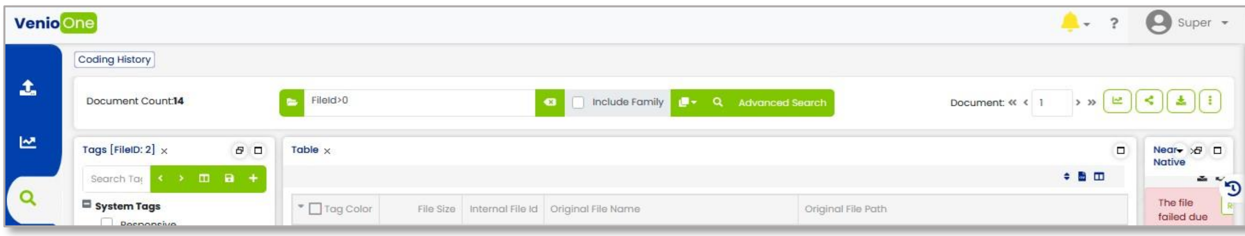


8.4 Review Module Center Panel

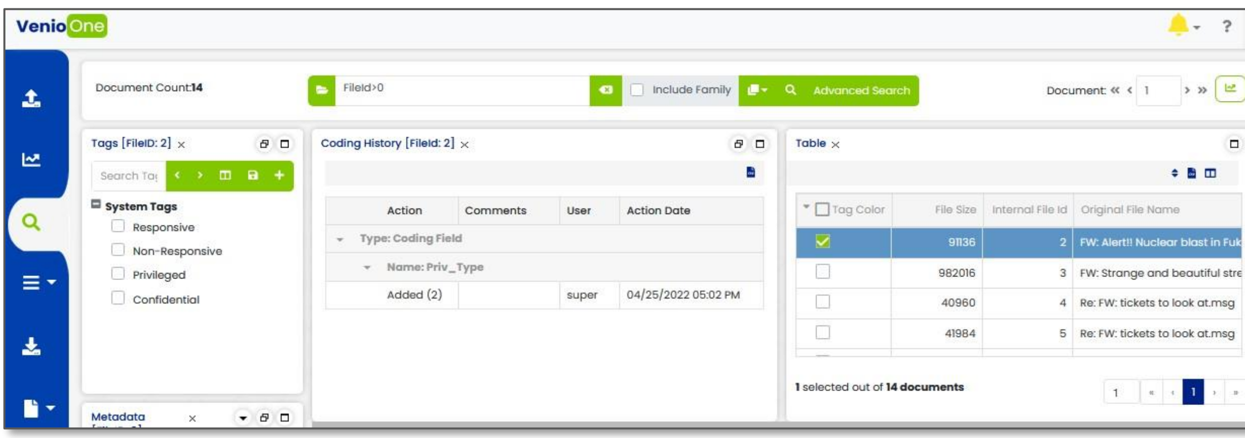
The main part of the center section of the Review module is the Document Table panel, but there are several other tools available there as well, which are detailed in this section.

8.4.1 Coding History

Coding History panel is used to monitor the tag/untag activity log and coding field activity log.

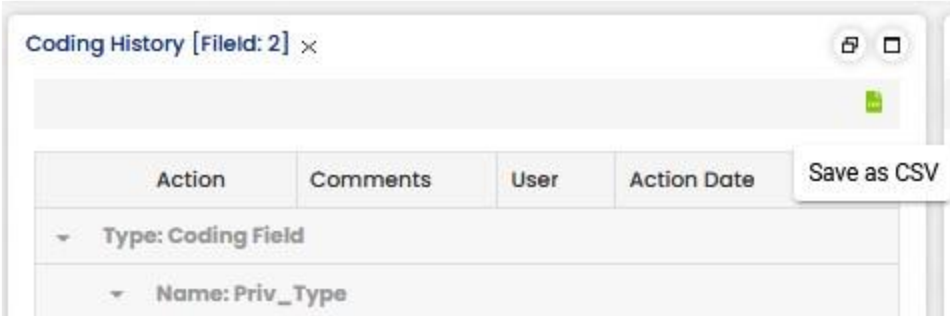


You can drag and drop Coding History to the main page too.



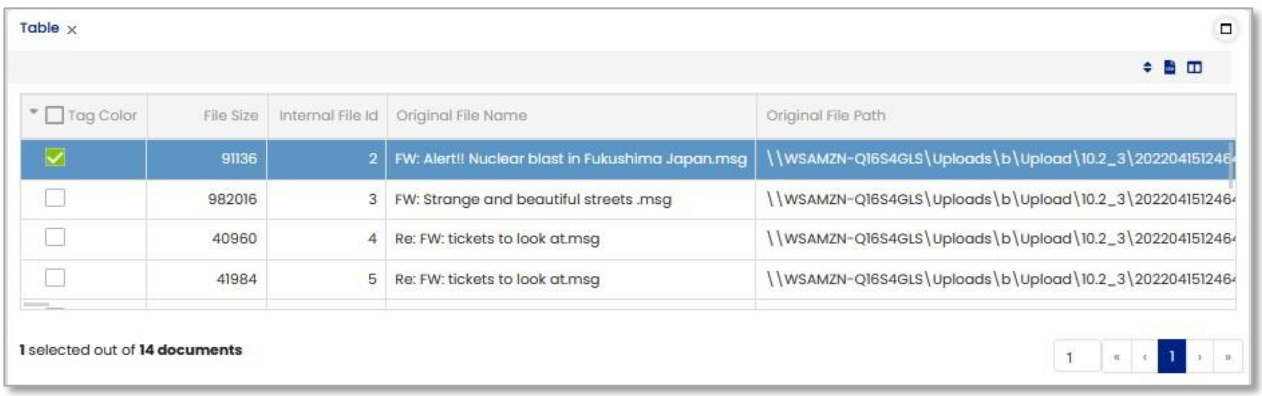
8.4.1.1 Save as CSV

To save the results displayed in the Coding History, click the Save as CSV button in the upper right corner of the Coding History. The list of files is saved to your computer's Download location.



8.4.2 Document Table

The Document Table displays various fields for the search results or documents to be reviewed, as well as a document count and navigation tools at the bottom of the table. Check boxes on the left may be used to select documents.

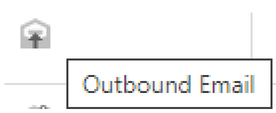


Document Types:

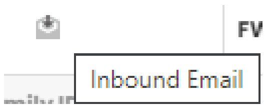
Email are categorized as internal, inbound, and outbound based on the internal domain specified in the case setting and those email identifiers are shown in the document type field in the document table on the review page.

Internal Email: 

Internal emails are those that are sent between individuals with email addresses that belong to the same organization or company.

Outbound Email: 

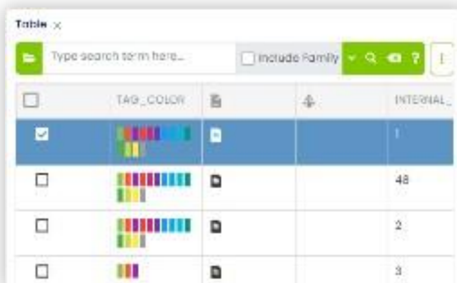
Outbound emails are those that are sent from an internal email address to an external email address, such as to a customer, vendor, or partner.

Inbound Email: 

Inbound emails are those that are sent from an external email address to an internal email address, such as from a customer or partner to an employee.

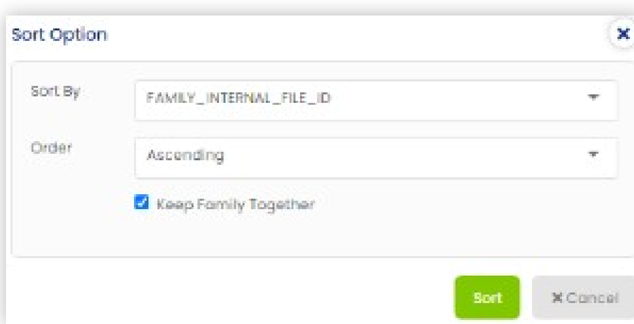
This is determined by the internal domains of the organization involved in the case in the Case Create Page and this field can take multiple domains as input.

A TAG_COLOR field may be included in the Document Table layout. It is displayed by default. Different colors are displayed in this column if that color tag has been applied for the document.



8.4.3 Sort Results

To select how items are sorted in the Document Table, click the Sort Results button in the upper right corner of the Document Table. Use the drop-down lists in the Sort Option dialog and then click the Sort button to re-sort the search results



8.4.4 Show/Hide Columns

To select which columns display in the Document Table, click the Show/Hide Columns button in the upper right corner of the Document Table. Deselect any items you wish to remove and click the Save button.

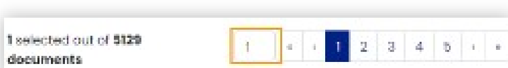
Fields will be displayed left to right in the same order as they are listed.

8.4.5 Save As CSV

To save the search results displayed in the Document Table, click the Save as CSV button in the upper right corner of the Document Table. The list of files is saved to your computer's Download location.

8.4.6 Page Navigator

Use the Page Navigator to move through the pages of documents in the Document Table. Click the right and left arrows to navigate through the pages and the double arrows to navigate to the beginning or end of the documents.



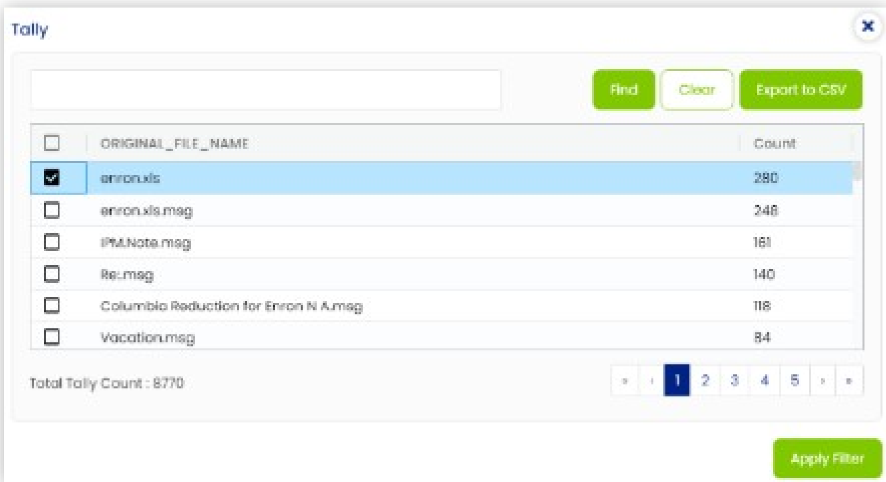
Enter a number in the search box to move to that page of documents.

8.4.7 Document Tally

Within the Document Table, you can do a document tally by clicking on any of the column headings. As soon as you click the column heading, the Tally dialog will display for that column. The individual items within that column will display with a count of how many there are. In the example below, we can see that there are 280 items with the original file name enron.xls. If needed, you may use the search field and Find button to locate items.

Check to select items in the Tally list and then click the Apply Filter button to show only those items.

You may also use the Export to CSV button to export the list of items and counts.

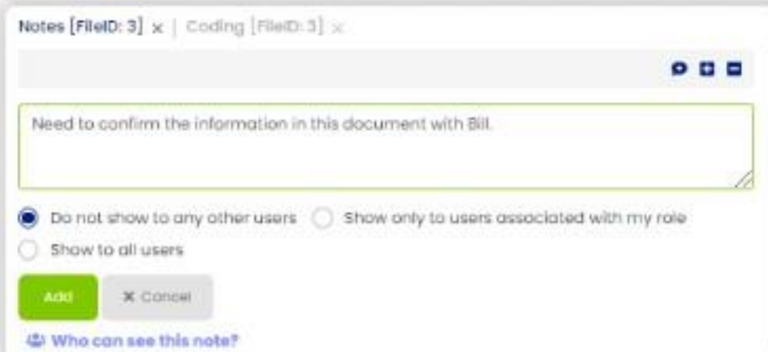


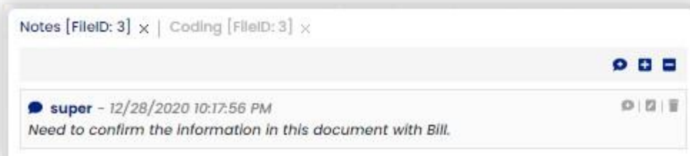
8.4.8 Document Notes

The Notes panel (below the Document Table) shows all of the documents notes in a threaded view. You may add a new note to the document, expand or collapse the list, edit an existing note, or reply using the icons displayed to the right of a note in the list.

8.4.8.1 Adding Notes

To add a note, click the Add Note button ( ) in the upper right corner of the panel. When adding a note, you may choose the visibility for your note using the radio buttons. After entering your note, click the Add button to save the note.

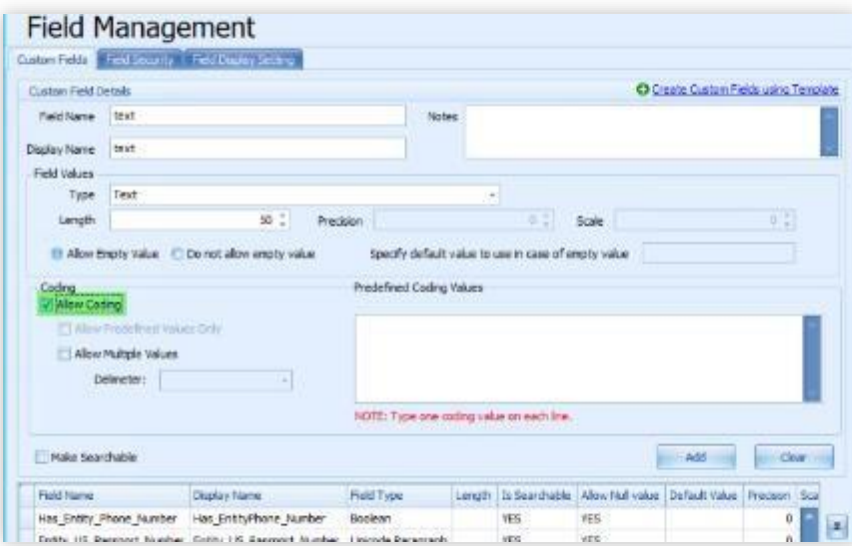




8.4.9 Coding Panel

The Coding panel displays all of the coding fields and is usually displayed as a tab within the Notes panel. Coding values may be single value, multi-value, or predefined values, which are separated by the delimiter selected when the custom field is created. Coding is available only once a custom field is created in Field Management from the Desktop Console and the Allow Coding checkbox is selected.

Then, the coding field must be added to the screen layout in VOD for it to be visible there.



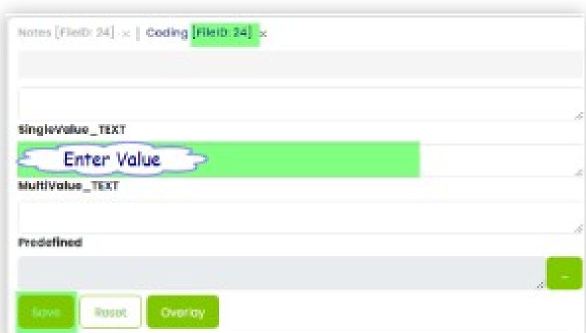
Depending on their rights, users may Reset, Add, and Update coding field values in bulk or for individual files. They must click the Save button to save their changes.
The Show/Hide Columns button in the upper right corner of the panel to adjust which coding fields are displayed within the panel. After any changes, you will need to save the changes as part of the screen layout in order to keep the fields displaying on the users next login.

As shown below, a Help icon next to each Coding Field Name displays information about the field when hovering over it. For multi-value fields, the delimiter that must be used between items is also displayed next to the Coding Field Name.

8.4.9.1 Add/ Update Single Coding Field

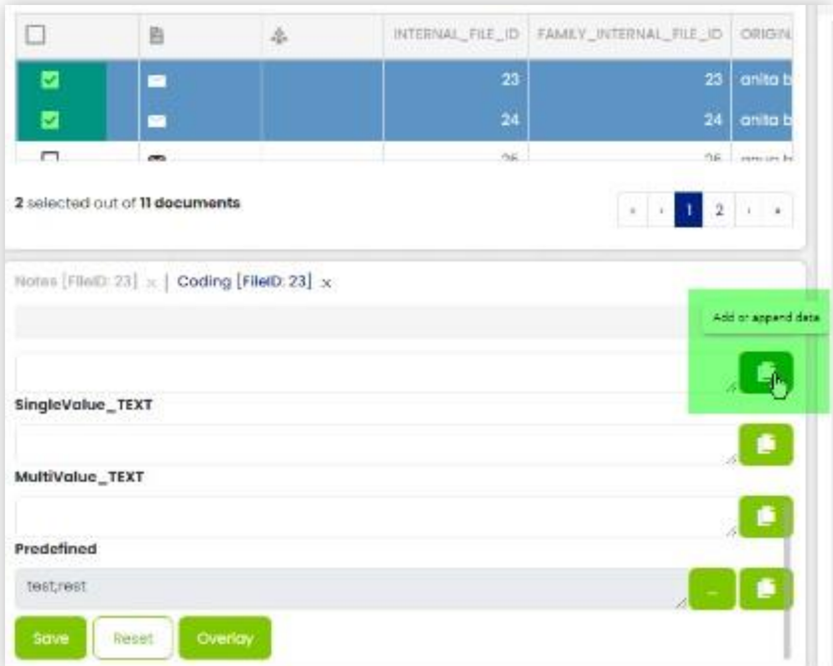
Users can perform single coding by entering a single value in the coding field. Be sure to click Save.

NOTE: The coding field value will update only for the last checked file If multiple files are selected.



8.4.9.2 Add/ Update Bulk Coding Fields

If a user has rights to do so, they can perform bulk coding on multiple files at one time. Users should first check the check boxes to select the files to apply the coding changes to. The Bulk coding Add or append data button is only displayed on the right side of the custom field grid when more than one file is selected.



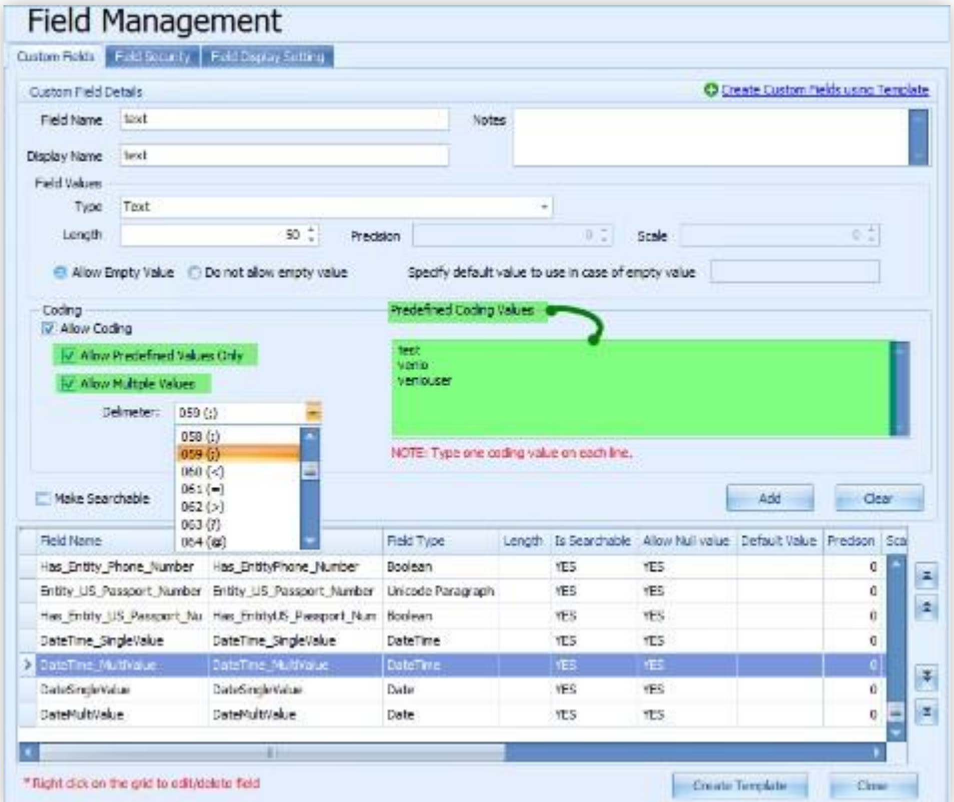
After clicking the Add or append data button, a dialog displays to enter the coding information. Click the Save button to return to the Coding panel.

After updating the value, the update success message is displayed in the top right corner of the screen and the bulk update values are updated after reloading the Review page.

8.4.9.3 Allow Predefined Values and Multiple Values

Coding values may be single value, multi-value, or predefined values, which are separated by the selected delimiter while creating the custom field. You may choose to allow users to only use the predefined values or enter another value by either selecting or deselecting the Allow

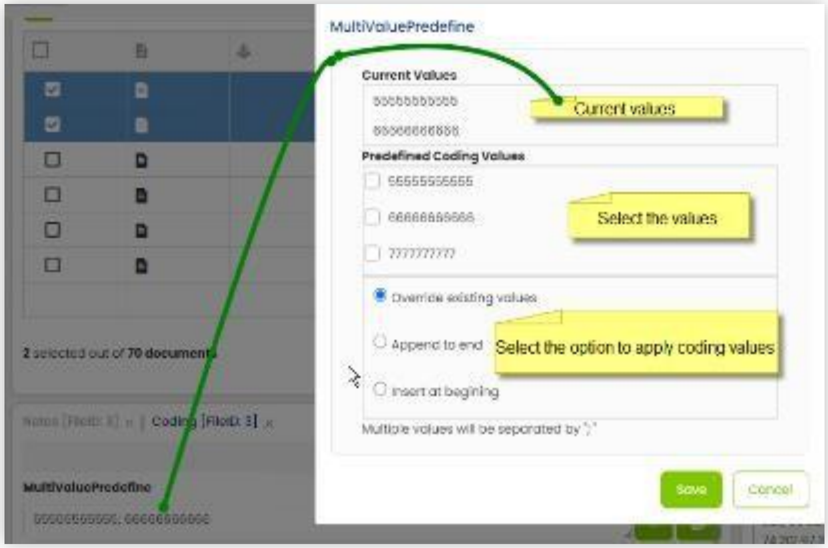
Predefined Values Only checkbox in Field Management in the Desktop Console. The Allow Multiple Values checkbox controls whether a single item or multiple items may be entered in the coding field.



With settings to only allow predefined values, users may only select the values which are already defined for the coding. Multiple values can also be selected, but users are not allowed to type in the textbox. Once the user clicks on the browse button, a wizard to select the predefined values will be opened where they can select single or multiple values. Any currently applied values will be displayed at the top of the wizard. The user will be provided with three different options to apply coding:

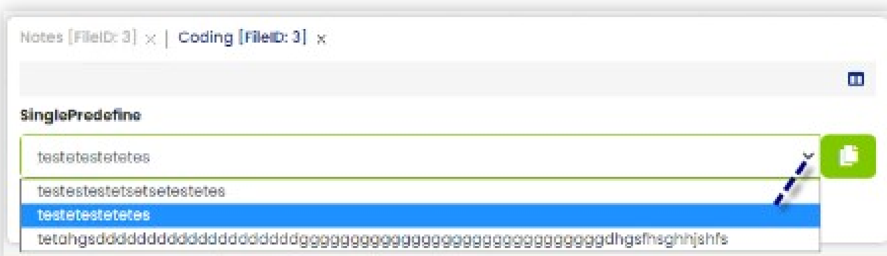
- Override existing values: Replaces previous values with current selected values.
- Append to end: Appends the current selected values after the previous values.
- Insert at beginning: Inserts the current selected values before the previous values.

After the details are selected, the user must click the OK button within the wizard. The bulk update values are updated after reloading the Review page. Finally, the user needs to click the Save button in the Coding panel to ensure the new values are saved.



8.4.9.4 Allow Predefined Values without Multiple Values

When users are only allowed to select from predefined values, but are not allowed to enter multiple values, then users can select predefined values from a drop-down list of the available values. The user has to select and then Save these values.



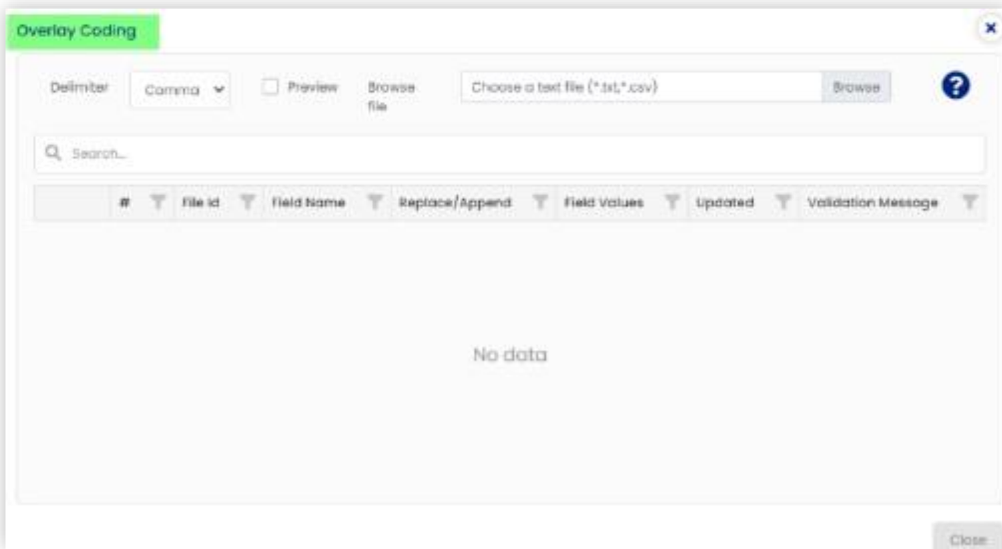
8.4.9.5 Multiple Values with No Predefined Values

Users are allowed to type multiple items in the coding field using the defined delimiter shown after the Coding Field Name. User needs to click the Save button to save the values.

8.4.9.6 Overlay Coding Field Values

Users may also overlay the coding fields' values using a load file in either.txt or.csv format. Start by clicking the Overlay button on the bottom left of the Coding panel.

The Overlay Coding page is displayed



Click the Help button in the upper right for information on formatting the load file.

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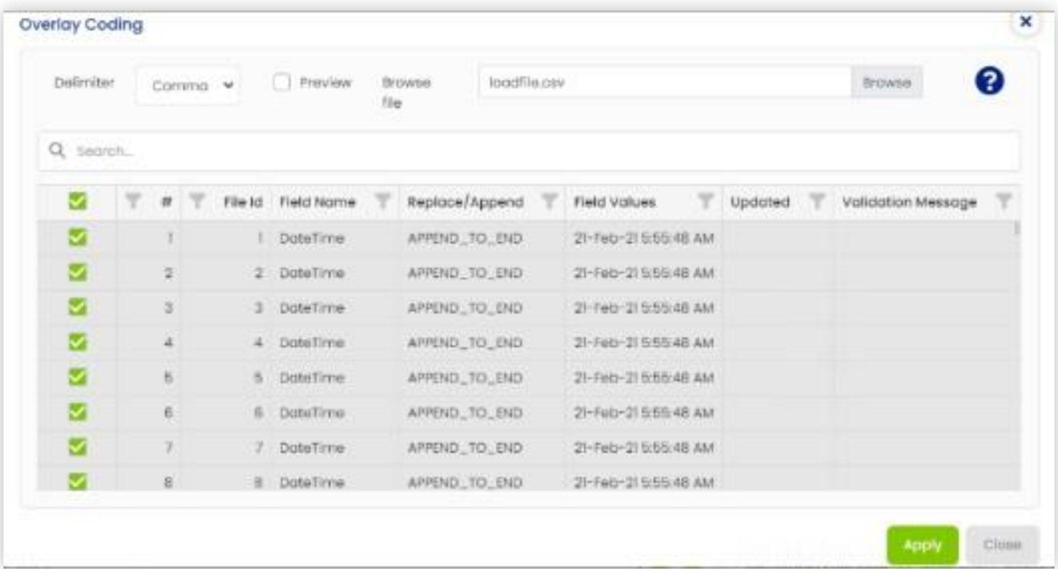
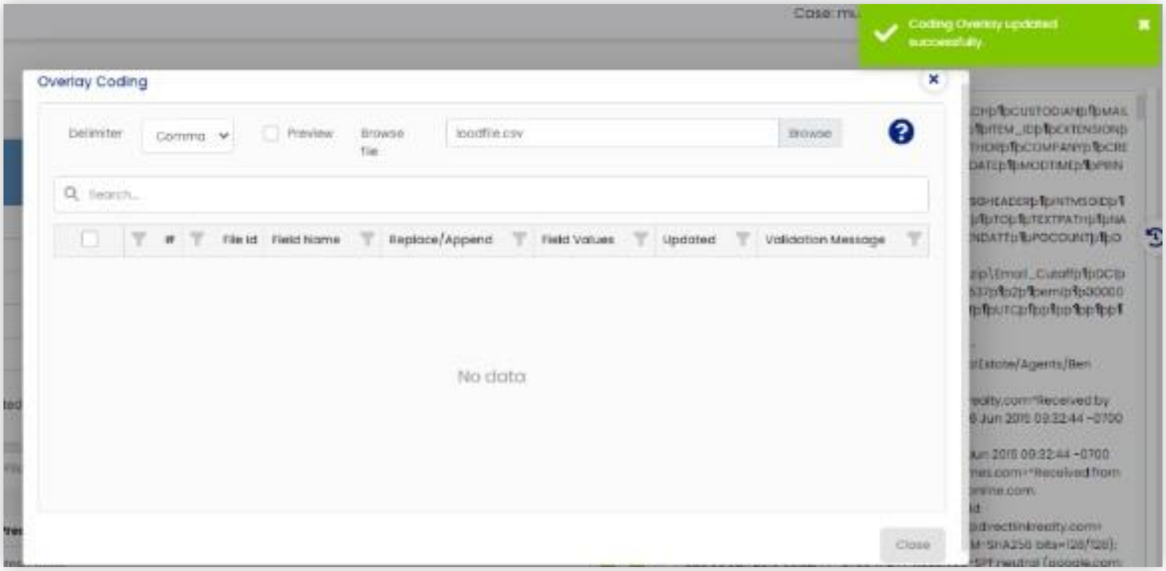
Click the Browse button and browse to your overlay file.

After browsing to the load file, all files are automatically loaded into the Overlay Coding dialog.

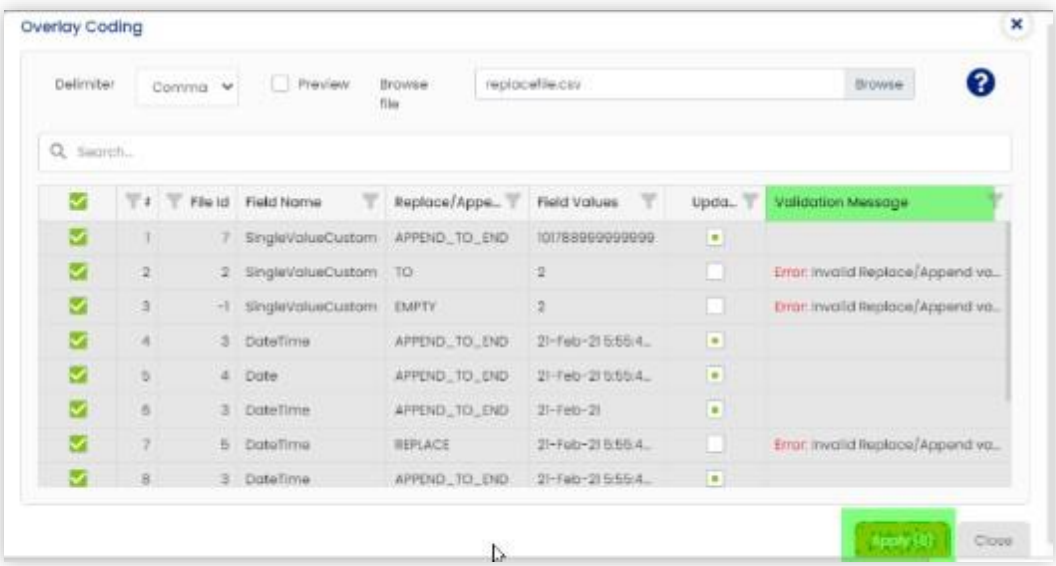


Click the Apply button to save the new values.

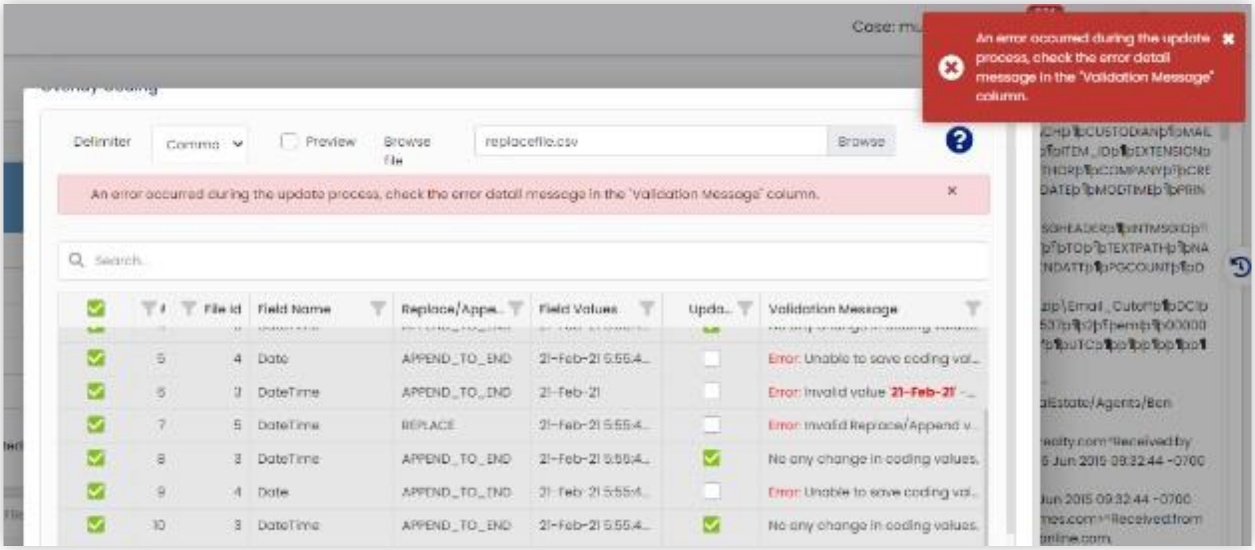
If the load file is valid, the update success message is displayed in the top right and the values are updated after reloading the Review page.



If the load file is invalid, the Validation Message column is displayed with error messages.



If you click the Apply button, an additional error message appears. Any rows with errors will not be overlaid until the issue is corrected in the load file.



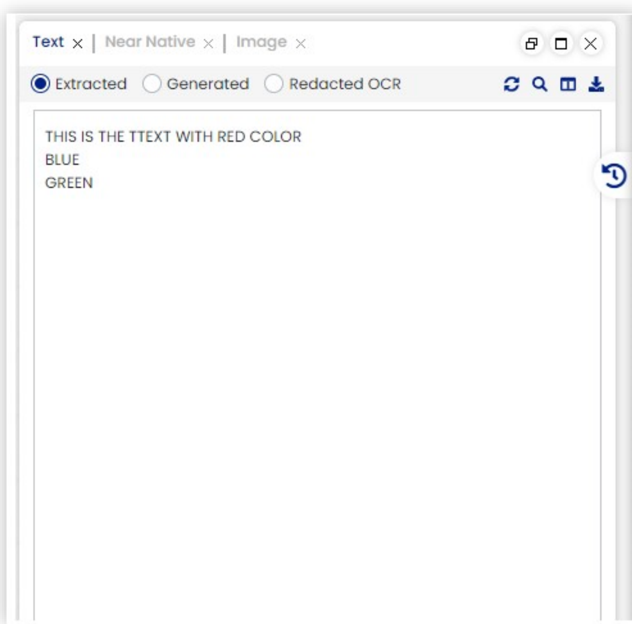
8.5 Document Viewer (Review Module Right Section)

The Document Viewer makes up the right section of the Review Module and displays the email/document contents in multiple formats, including Text, Native, or Tiff view.

NOTE: In *Index only* cases, the Document Viewer will only have Text view. Native, Tiff, and PDF views will be disabled.

8.5.1 Text View

Text View shows the text in the body of the Email/Document. If the project settings included headers in the email body, you will also see this information in the Text View.



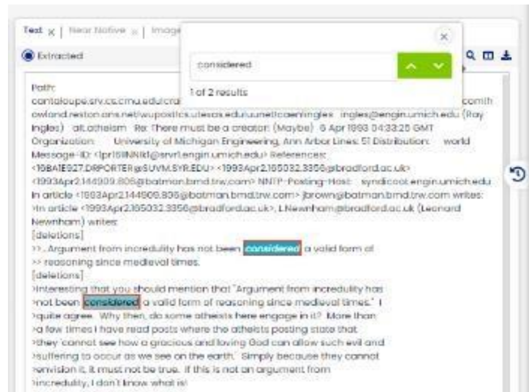
There are radio buttons at the top of the viewer for the following:

Extracted – Extracted text for documents.

Generated - Extracted text for image files.

Redacted - Extracted text for redacted image/image set files.

You can click the Search button and enter the search term in the search box that displays. If the search term you entered matches a term you specified in Term Highlighting, then the term should be highlighted with the specified color



8.5.2 Near Native/Native View

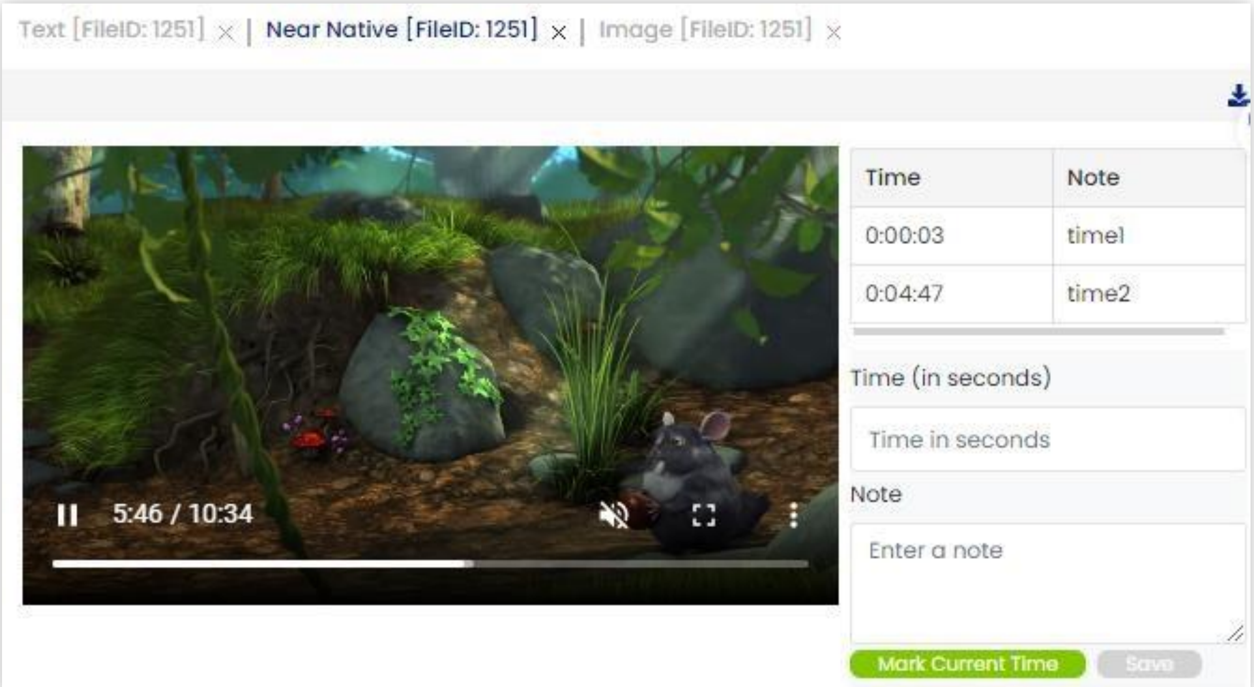
If you open VOD in the Internet Explorer browser before installing the Venio Addons, it will display the Near Native View.

After the installation of the Venio Addons, VOD will display the Native View. This view shows the metadata and text in the body of the email or document in its native format.

8.5.2.1 Viewing Supported Multimedia File Types

Supported media files are displayed in the Near Native Viewer when selected from the document list. You can mark different points of time within the file and add Notes. The list of marked time and Notes will be available and when clicked, the media player will navigate to the respective point in the audio/video file.

To create a time-stamped note: Click into the Note field, enter your note, click the Mark Current Time button, and then click the Save button.



8.5.3 Image View

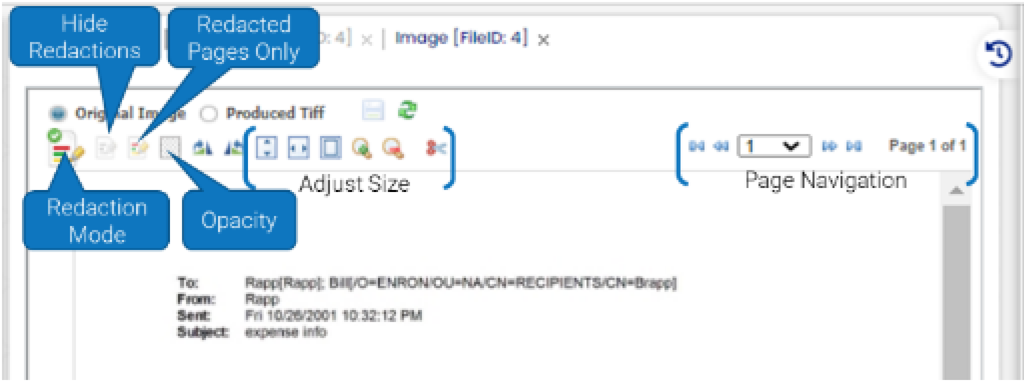
In the Image View tab, you can view any documents that have been successfully tiffed.

If a file has not been tiffed, clicking on this tab will perform a "tiff-onthe-fly" to display the image.

In this view, you may add annotations, redactions, and highlights, if you have been given rights to do so by the Administrator.

8.5.3.1 Redaction and Viewing Tools

Tools for viewing the document, as well as any redactions, are found at the top of the Image View. There are options for changing the size of the document within the viewer, as well as navigating the pages of the document. Additionally, there are tools for working with the redactions, if any, in the document.



The tools for viewing redactions offer the following options:

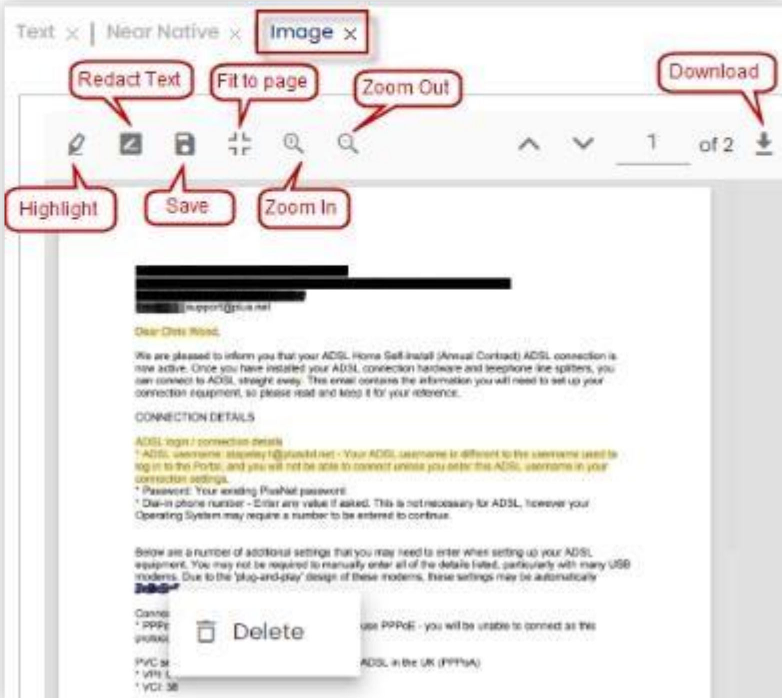
- Redacted Pages Only - See only those pages within a document where annotations have been added. By using this feature, redactions can be quickly reviewed, or modified.
- Hide Redactions - View tiff files without their redactions.
- Redaction Mode – Displays redaction tools, which are covered in the next section.
- Opacity - Make all redactions or highlights transparent without modifying them.

8.5.3.2 PDF View

When the Control setting key Enable_PDF_Imaging flag is enabled in the database, the PDF Viewer is loaded in the Image tab for PDF image files. In this view, you may add redactions and highlights.

The following tools are available in this view:

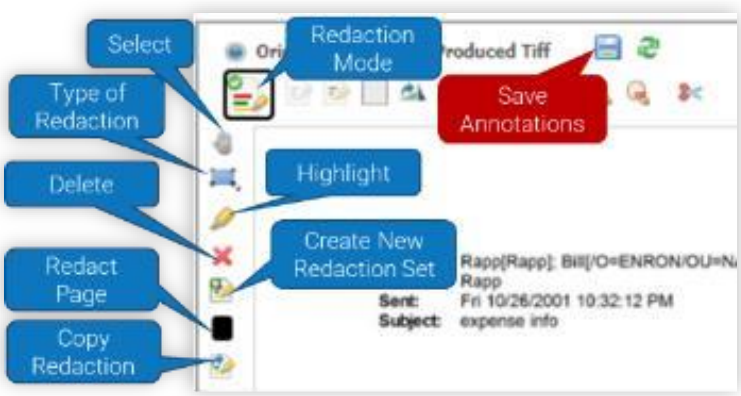
- Highlight
- Redact Text
- Save
- Fit to Page
- Zoom In/Zoom Out
- Download (if you have rights to do so)



To delete any applied redactions or highlights, select the element and right-click for the Delete option.

8.5.4 Annotations and Redactions

In the Image View, you may annotate or redact the image of the email/document, as needed. To do so, click the Redaction Mode button to display the redaction tools on the left side of the screen and enable redactions to be made.



8.5.4.1 Accessing Redaction Sets

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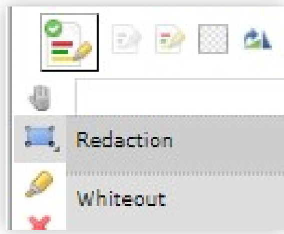
When there are redaction sets available for use within your project, you will see the Redaction Set button (as shown). Hovering over it will display the available redaction sets. It may be used to access or edit existing redaction sets.



8.5.4.2 Applying Redactions

1. In Redaction Mode, hover over the Type of Redaction button and select the redaction to be used.

   The cursor displays as a + symbol.

2. Click-and-drag to select the area to be redacted.

   When the cursor is released, the selected area is redacted.

   If needed, click the Select button to select the redacted area and adjust. 4.
Click the Save Annotations button to save the redactions.

   A confirmation that annotations have been saved will display briefly.

8.5.4.3 Applying Highlights

1. In Redaction Mode, hover over the Highlight button and click Highlight.

   The cursor displays as a highlighter.

2. Click-and-drag to select the area to be highlighted.

   When the cursor is released, the selected area is highlighted.

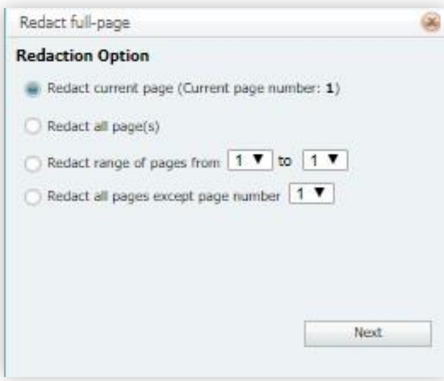
   If needed, click the Select button to select the highlighted area and adjust. 4.
Click the Save Annotations button to save the highlights.

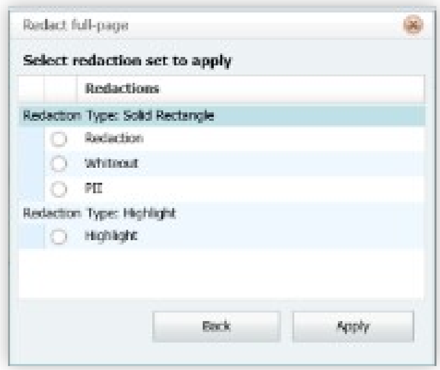
   A confirmation that annotations have been saved will display briefly.

8.5.4.4 Redacting Entire Pages

1. To redact an entire page or pages of a document, click the Redact Page button.
2. Select the option for which pages to be redacted and click the Next button.
Select the Redaction Set and click the Apply button.

The selected redactions are applied to the designated page(s).





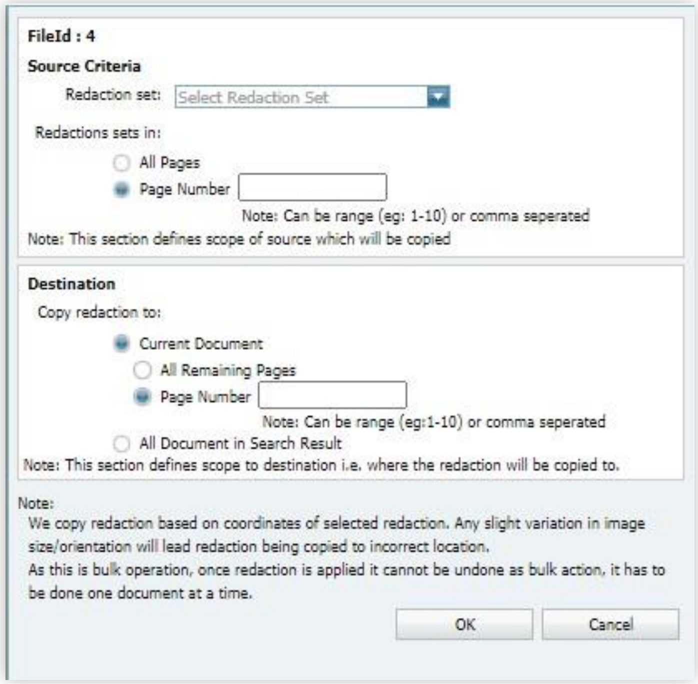
8.5.4.5 Copying Redactions

IMPORTANT: Prior to using this function, ensure that your image size and orientation are the same. This is a bulk operation that, because of the way the redactions are applied, cannot be undone in bulk.

1. In Redaction Mode, select a redaction. 2.
Click the Copy Redaction button.

The Copy Redaction dialog displays.

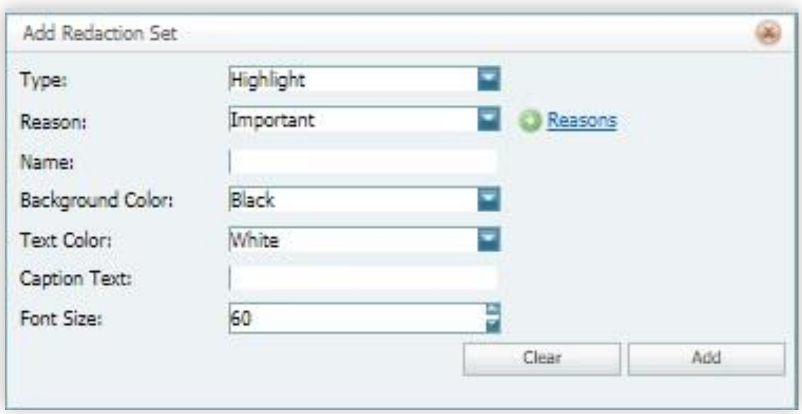
Select the options to use within the dialog.
4. Click the OK button to add the copied redaction to the selected location(s).



8.5.4.6 Create a New Redaction Set

1. To create a new redaction set, click the Create New Redaction Set button.

The Add Redaction Set dialog will display.



2. Complete the information as follows:

Type: There are two types of redactions: *Solid Rectangle* and *Highlight*

Reason: There are three predefined reasons for redaction: *Privileged*, *Confidential* and *PII*.
NOTE: You may use the Reasons link to add additional reasons for redaction.

Name: Name to identify the redaction set.
Background Color: Background color of the redaction set.

Text Color: Text color of the redaction set.

Caption Text: Text to be shown on the redactions, if needed.

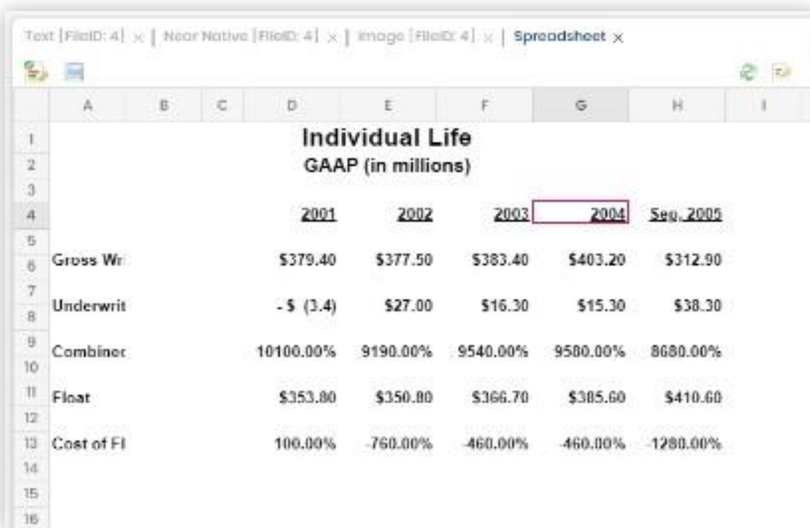
Font Size: Font size of the caption text.

Click the Add button to create the redaction set.

8.5.5 Spreadsheet View

In the Spreadsheet tab, you can view any Excel documents that have been successfully ingested.

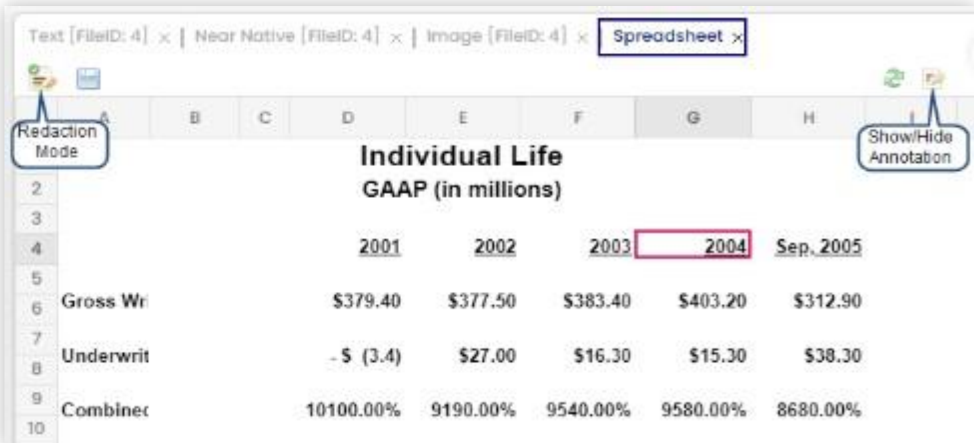
In this view, you may add redactions and highlights, if you have been given rights to do so by the Administrator.



8.5.5.1 Spreadsheet Redaction and Viewing Tools

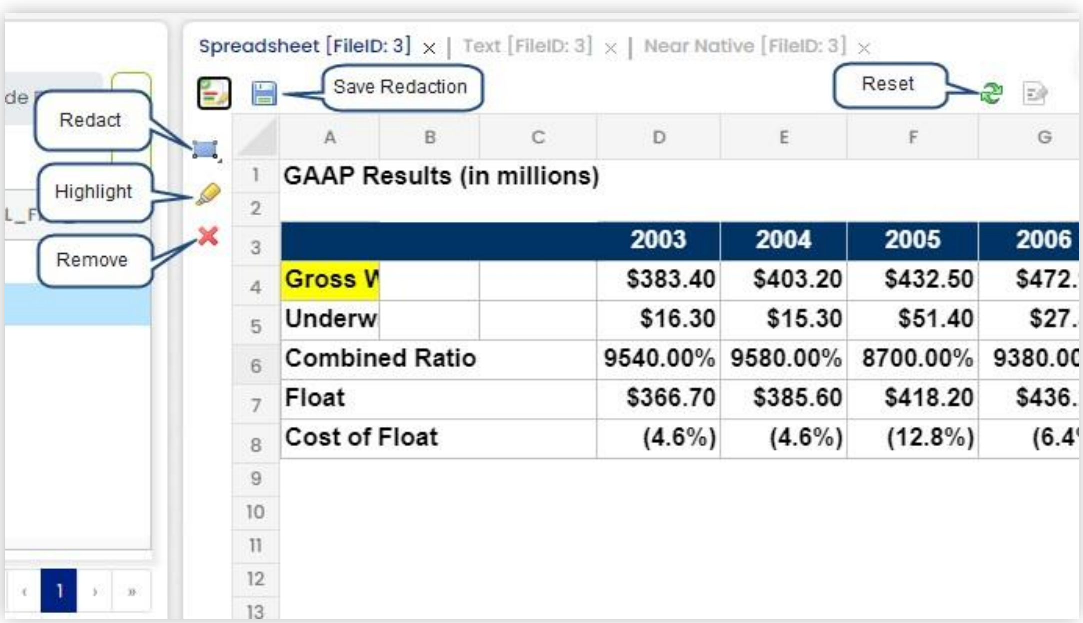
Tools for viewing the spreadsheet, as well as any redactions, are found at the top of the viewer. There are options for Redaction Mode and Show/Hide Redaction. Additionally, there are tools for working with the redactions, if any, in the document.

- Show Annotation - See only those pages within a document where annotations have been added.
- Hide Annotation - View Excel files without redactions.
- Redaction Mode - By using this feature, redactions can be quickly reviewed, or modified.



8.5.5.2 Annotations and Redactions

In the Spreadsheet View, you may annotate or redact the image of the excel document, as needed. To do so, click the Redaction Mode button to display the redaction tools on the left side of the screen.



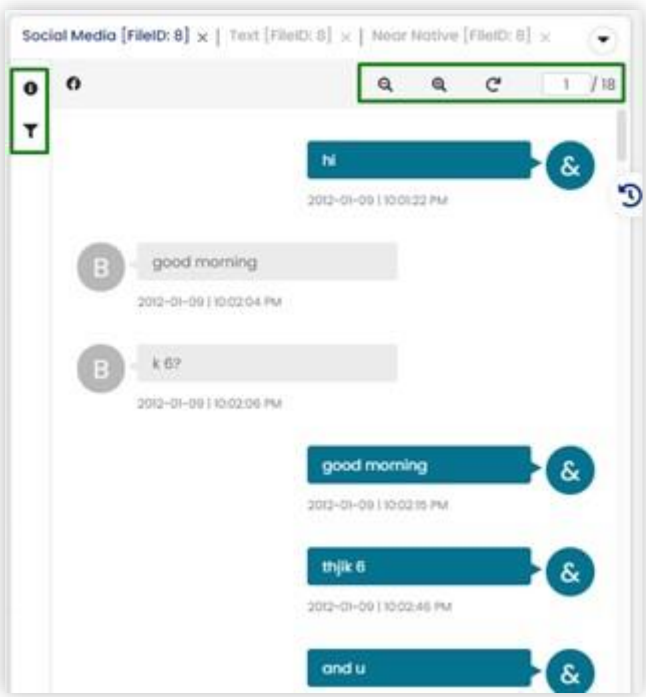
8.5.6 Social Media View

Extracted social media files can be viewed from the Social Media Viewer.

NOTE: The Social Media Viewer must be enabled for the Layout selected and the following permission must be enabled for the user: ALLOW_TO_VIEW_SOCIAL_MEDIA_VIEWER.

If it is not displayed, click on the Document Viewer drop-down arrow and select Social Media to display the Social Media Viewer.

In the top right corner of the Social Media Viewer, you have options to zoom in/out, refresh, and enter a page number to go to a particular page.



Similarly, you have buttons on the left to view conversation Metadata Information and also the Filter content. You also have an icon for the social media platform from which the data was extracted e.g., the Facebook icon.

Filter will allow you to filter messages by participants in the conversation and also the date range.

8.5.7 Transcript View

In the Transcript tab, you can view any transcript documents that have been successfully uploaded.

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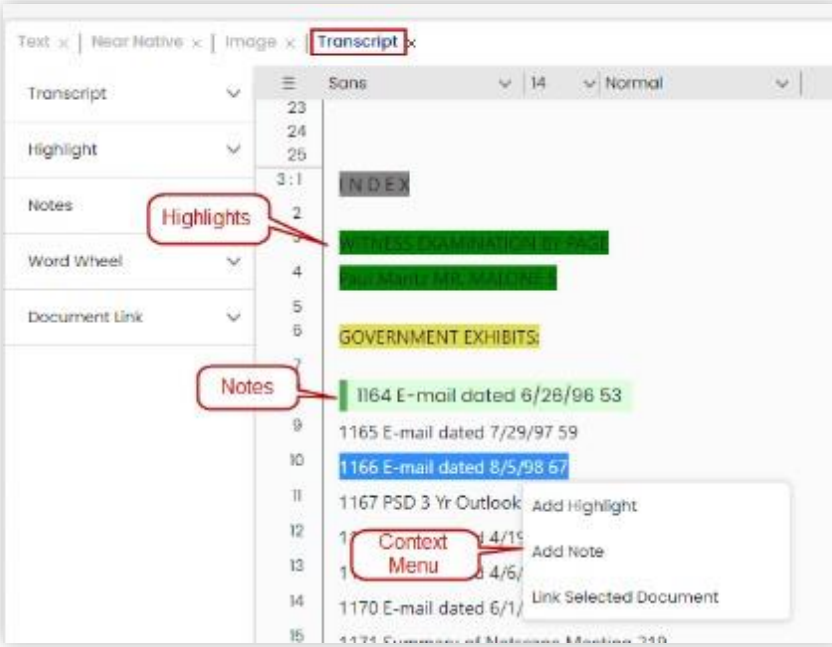


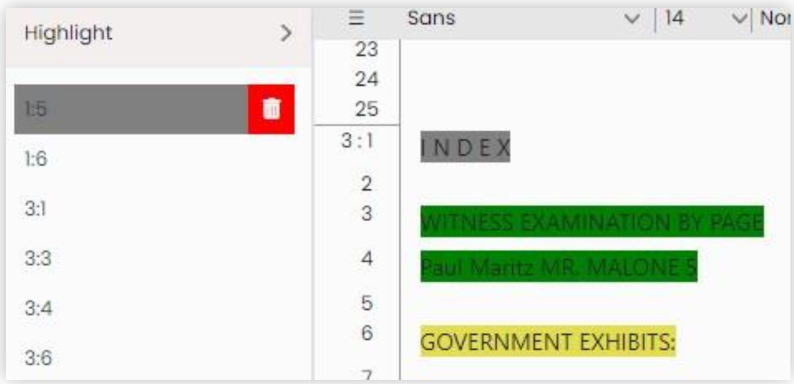
In this view, you may add notes and highlights, if you have been given rights to do so by the Administrator. The Font, Font Size, and Font Type can be changed from the drop-down options available at the top of the viewer.

8.5.7.1 Making Transcript Annotations

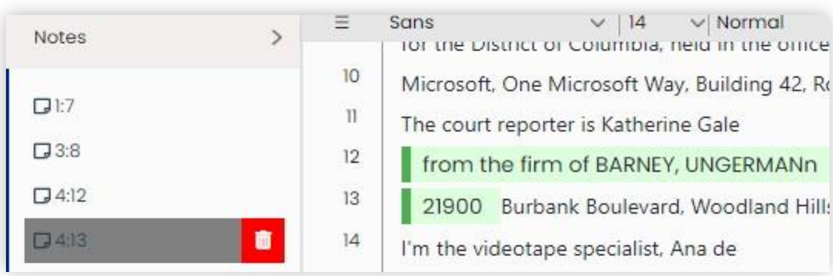
To display the side panel, click the hamburger Menu button ☰ In the top left corner of the viewer. The following options are displayed:

- Transcript: In this section of the panel, all the uploaded transcript files will be listed. Click the required file name to view it.

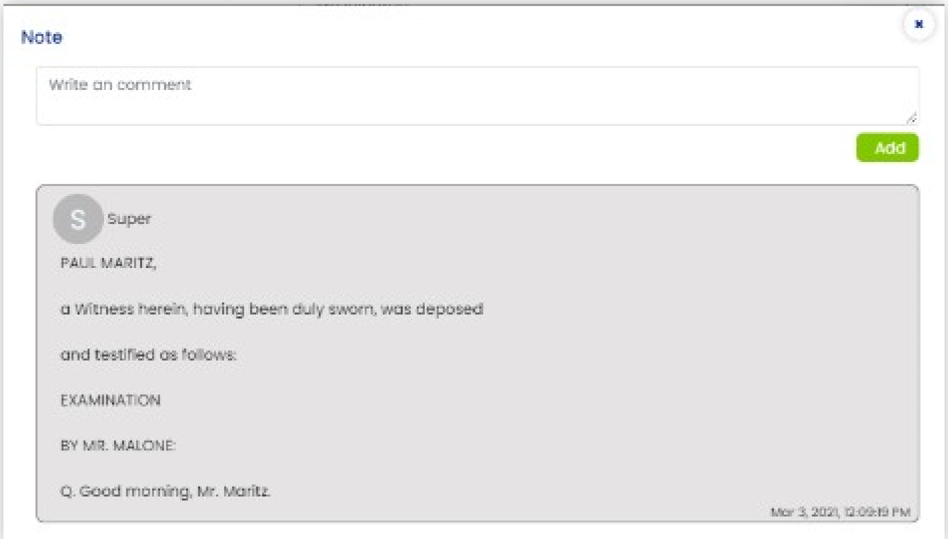
- Highlight: All the applied highlights will be listed. They will be displayed in the format - *PageNumber*:*LineNumber* e.g., 12:20. When any of the listed numbers is clicked, it will navigate to the respective page. To delete the highlight, click the Delete button beside the respective highlight.



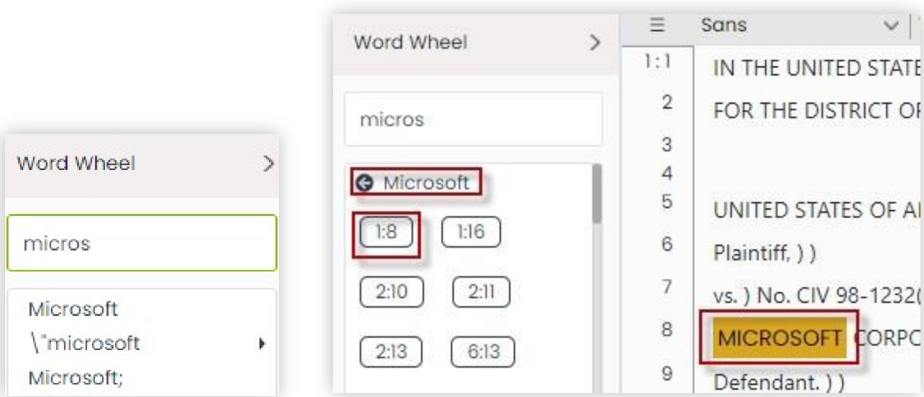
- Notes: All the added notes will be listed. They will be displayed in the format - *PageNumber*:*LineNumber* e.g., 1:6. When any of the listed numbers is clicked, it will navigate to the respective page. If you want to delete the note, you can click on the Delete button beside the respective note.



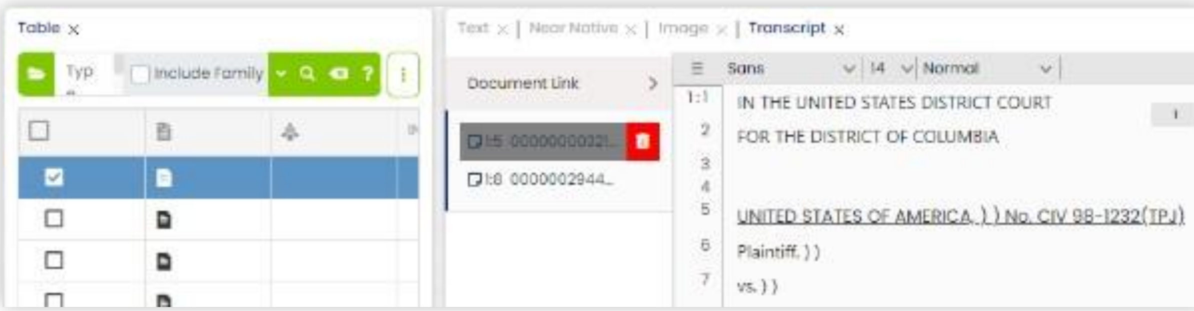
To view the added note, click the icon beside the note or click on the line where the note is added. The note is displayed as follows with the name of the person who created it and the creation date.



- Word Wheel: A search field is available where you can enter the term you want to search or a series of terms in single quotations e.g., ‘Microsoft Corporation’. Click the Search button to display all possible results and highlight the searched term. When you click to select a search term, the page and section numbers will be displayed for all instances of the search term. When a number is clicked, VOD will navigate to the respective page and line.



- Document Link: Documents within the project can be linked to the selected text/line of a transcript file. Document links will be displayed in the format *PageNumber:LineNumber FileName*, for example 12:20 test.zip. When any of the Document Links are clicked, VOD will navigate to the respective page. If you want to delete the link, click the Delete button beside the respective Document Link.



8.5.7.2 Adding Transcript Highlights

To add a highlight, select text within the transcript and then right-click. Select one of the three highlight colors you wish to use. The text will be highlighted, and the page/line number reference added to the list of Highlights. Be sure to click the Save button to save your changes.

8.5.7.3 Adding Transcript Notes

To add a note, select text within the transcript and then right-click. Select Note and enter the text for the note. Click the Close button when finished. The page/line number reference is added to the list of Notes. Be sure to click the Save button to save your changes.

8.5.7.4 Adding Document Links

To add a document link, first select document(s) from the Document Table. Then, select text within the transcript and right-click. Select Link Selected Document. Click the Close button when finished. The page/line number and document reference are added to the list of Document Links.

8.5.7.5 Transcript Annotation Report

In the upper right corner of the Transcript Viewer is a button for reporting on transcript annotations. The following options are available in the Select Report drop-down: All, Notes, and Highlight. Select one of the options and click the Generate Report button. The report will generate in a new window. The report displays the notes, created by, created time, and the page/line references where the note is added. Similarly, for highlights, it shows the section of the transcript which are highlighted.

The report is generated as follows:

Click the Print button to print the generated report.

8.6 Document Collaboration

Please refer to section Error! Reference source not found. on Document Sharing.

9 Searching in VOD

9.1 Search Overview

In VenioOne, a search involves searching for a particular term or phrase in the specified media scope. Depending upon the search query, VenioOne may search in the Lucene index or in the SQL project database. VenioOne uses Lucene.Net Version 2.9.2 for fulltext indexing of documents and metadata.

NOTE: Search terms are NOT case-sensitive.

- A query is broken up into terms and operators. There are two types of terms: Single Terms and Phrases.
- A Single Term is a single word such as "test" or "hello".
- A Phrase is a group of words surrounded by double quotes such as "hello dolly".
- Multiple terms can be combined together with Boolean operators to form a more complex query.

9.2 Boolean Search Operators

Boolean operators are AND, OR and NOT (The operators MUST always be in UPPERCASE). Boolean operators are used to combine different search criteria to form the final compound search query.

Note: The precedence of the Boolean operators is NOT → AND → OR. First NOT is processed, then AND after that OR. Use the round braces '(' and ')' to group search terms to reduce confusion.

9.2.1 OR Operator

The OR operator links two terms and finds a matching document if either of the terms exist in a document. The OR operator is the default conjunction operator. This means that if there is no Boolean operator between two terms, the OR operator is used.

Example 1:

To search for documents that contains either "signed contract" or "agreement" use query:

"Signed contract" OR agreement

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Note: If you want to find only documents that contain the phrase “signed contract”, you must use the quotation marks. Otherwise, you will get different results, with false positives.

Example 2:

If you run a query without quotations using the following:

Signed contract OR agreement.

The result will be all documents containing either the word “signed”, “contract” or “agreement” because the default OR operator will be used between the terms. This will likely yield more results than Example 1.

9.2.2 AND Operator

The AND operator matches documents where both terms exist anywhere in the text of a single document. This is equivalent to an intersection using sets. The symbol && can be used in place of the word AND.

To search for documents that contain "signed contract" and "confidentiality agreement" use the query:

"Signed contract" AND "confidentiality agreement"

9.2.3 NOT Operator

The NOT operator excludes documents that contain the term after NOT. This is equivalent to a difference using sets. The symbol ! can be used in place of the word NOT.

To search for documents that contain "signed contract" but not "confidentiality agreement" use the query:

"Signed contract" NOT "confidentiality agreement"

Note: The NOT operator cannot be used with just one term. For example, the following search will return no results:

NOT "confidentiality agreement"

9.3 Special Characters

In VenioOne, as in many common indexers, some symbols or characters are treated as stop words and are skipped during indexing, therefore not searchable.

To escape these characters, you need to use the “\” before the character.

For example to search for (1+1):2 use the query: \(1\+1\)\:2
VenioOne supports escaping special characters that are part of the query syntax. The current list of special characters is:

?	[	{	^
%	]	}	;
+ > “ < - = ~ /			
! @ \	& (_	* .	
)	‘	:	|

9.4 Wildcard Characters

Wildcard is only supported in Search By Term, Wildcard Search, Fuzzy Search, Proximity Search and Field Search. Wildcards supported by VenioOne are *and ?. The wildcard characters are described below.

The * wildcard will match zero or more characters, except space.

Multiple character wildcard searches looks for 0 or more characters. For example, to search for test, tests or tester, you can use the search:

test*

You can also use the wildcard searches in the middle of a term. For example, to search for text, tent, or tenant, you can use the search:

te*t

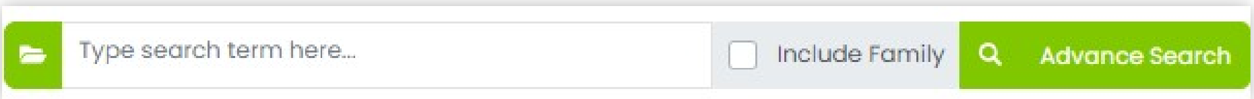
The ? wildcard will match a single character, except space.

The single character wildcard search looks for terms that match that with the single character replaced. For example, to search for "text" or "test" you can use the search:

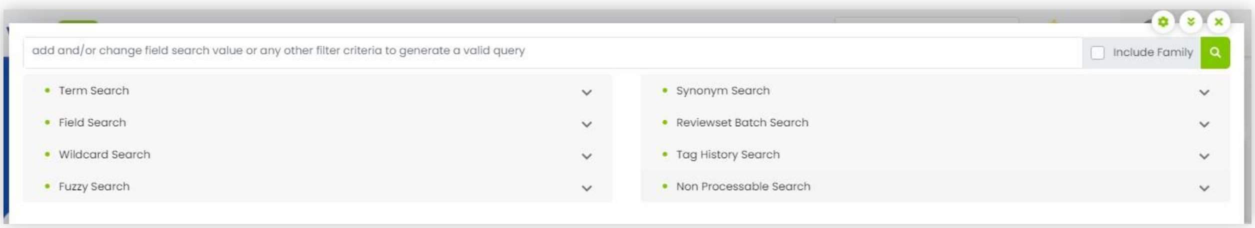
te?t

9.5 Advance Search

Advance Search button is available at the end of the search bar as shown below:

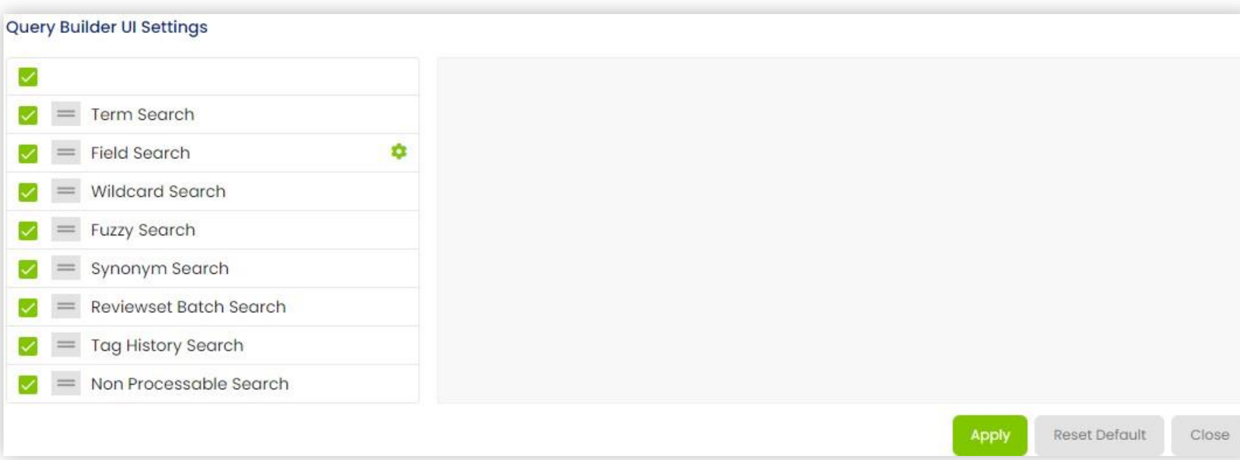


Click the button to open the Advance Search dialog. Expandable sections indicate the different types of searches available, which are described in the sections below. The search composed using one or more of the different search types will be displayed at the top of the Advanced Query Builder.



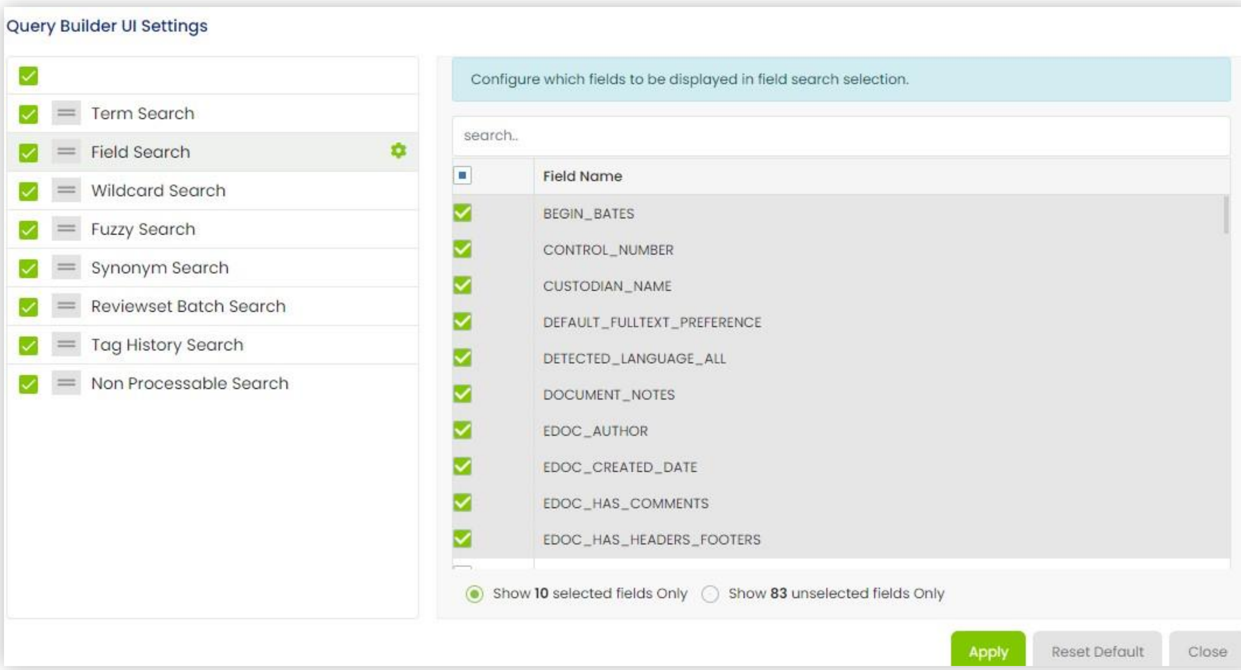
9.5.1 Query Builder UI Settings

You can edit the Query Builder UI Settings through a button available at the top right corner of the dialog. You can re-order, select/unselect the available search modules by selecting the available options.



Fields for the Field Search can be configured using the corresponding settings icon. The selected fields are listed according to the options : 'Show X selected fields only' or 'Show X unselected fields only' in the field search.

Select the settings from the list. The corresponding options appears for you to select the desired options:



Select the desired options and click Apply.

Reset Default resets all the settings to default values.

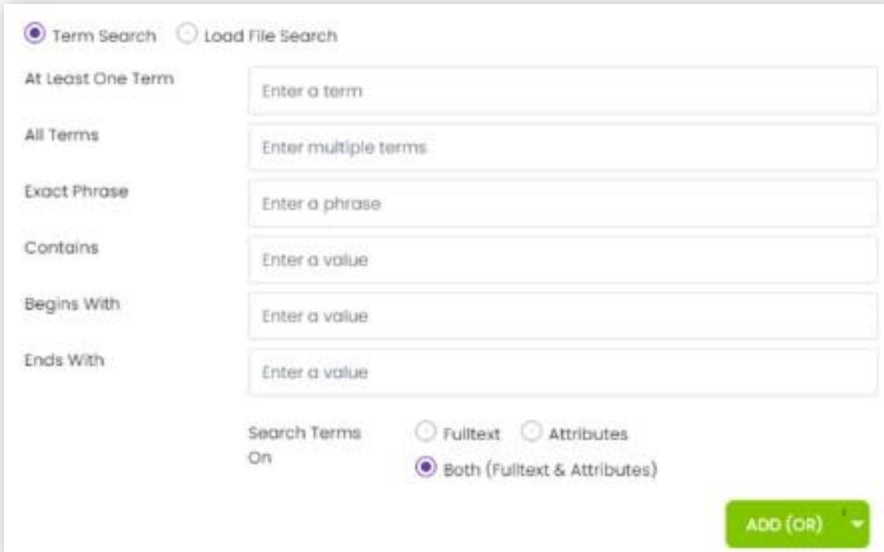
9.5.2 Term Search

The Term Search section enables you to search in document contents, metadata, or both document contents and metadata by providing the keyword(s) and/or phrase(s).

Enter the terms in the desired field(s), select the context option, and then click the ADD(OR) button to create an OR search.

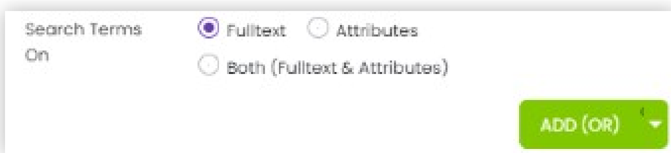
To create an AND or NOT search, click the drop-down arrow on the ADD(OR) button and select the desired option.

The query will be added to the Search Bar at the top of the screen.



9.5.2.1 Term Search Options

- To search only the document contents, select the FULLTEXT radio button. Search terms can be multiple terms combined using Boolean operators.

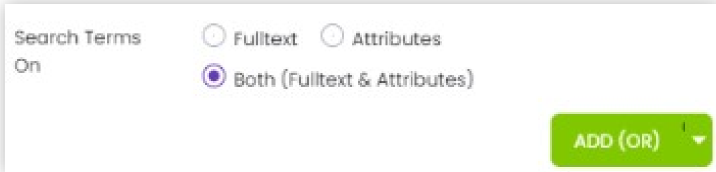


Example: FULLTEXT(term1 OR term2)

- To search only document metadata, select the ATTRIBUTES radio button. Search terms can be multiple terms combined using Boolean operators.

Example: ATTRIBUTES(term1 OR term2)

- To search in both document contents and metadata, select the Both (Fulltext and Attributes) radio button. Search terms can be multiple terms combined using boolean operators.



Example: term1 OR term2

Note: If neither FULLTEXT nor ATTRIBUTES is specified, by default the term is searched in both attributes and fulltext.

NOTE:

Caution Regarding >= and <= Operators in Text Field Searches
It's important to exercise caution when considering the use of the >= and <= operators in search operations involving text fields. These operators, primarily designed for numerical comparisons, should not be employed with text fields due to the potential for generating incorrect search results. Instead, it's advised to restrict the application of these operators exclusively to numeric custom fields.

To illustrate this, let's examine a practical scenario using a dataset containing the values 'a', '2', and '11', all stored as text within a field. When the >= and <= operators are utilized in this context, unexpected and inaccurate SQL outputs can arise:

```sql
declare @temp table (val nvarchar(max))
insert into @temp values ('a'),('11'),('2')
select * from @temp where val < '2' -- returns '11'
select * from @temp where val > '11' -- returns 'a', '2'
```

This example exemplifies the pitfalls of using >= and <= operators on text fields, as the results diverge from anticipated outcomes. Consequently, adhering to numerical custom fields for operations involving these operators is essential to ensure accurate and reliable querying.

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9.5.3 Load File Search

Within the Term Search tab of the Advance Query Builder, you can use a Load File to run searches in VOD. This is particularly useful if you want to use the same searches again or across projects, or if you have a lot of search terms.

1. In the Advance Query Builder, on the Term Search tab, select the Load from File radio button.
2. From the drop-down menu, select the type of load file you will be using.

VOD accepts the following types of load files for searching:

- Search Term: This is used to search for specified terms contained in the load file. The Search Term option loads the listed search terms from a text file and searches for documents containing those terms.

  This type of load file supports every search expression that is valid in the search query

  box. Example 1: field search like FileID = 26 OR ControlNumber = 1123

  This query will search for documents with Control Number "1123" OR a document with FileID 26. It should be noted that for field searches, the Field Name must be specified otherwise the search term will be treated as a single term.

  Example 2: "Responsive" will search for documents with the term "responsive," but TAGS ("responsive") will search for all documents that have been tagged as "responsive".

- INTERNAL_FILE _ID: This loads the listed FileIDs from a text file and searches for documents containing those FileIDs. The field should not be included in the load file. A search for FileID=23 should be written only as 23 in the load file.

  NOTE: Unlike the Term Search, this query does not support other field searches and should only contain FileIDs.
- EMAIL_ENTRY_ID: This loads a text file containing a list of EntryIDs that are to be searched. This query also does not support other field searches and should only contain Entry IDs. And, like in the INTERNAL_FILE_ID searches, the field should not be included.
- HASH_VALUE: This loads a text file containing a list of hash values that are to be searched. This query also does not support other field searches and should only contain hash values. And, like in INTERNAL_FILE_ID searches, the field should not be included.
- HASH_VALUE_SECONDARY: This loads a text file containing a list of secondary hash values that are to be searched. This query also does not support other field searches and

should only contain secondary hash values. And, like in INTERNAL_FILE_ID searches, the field should not be included.

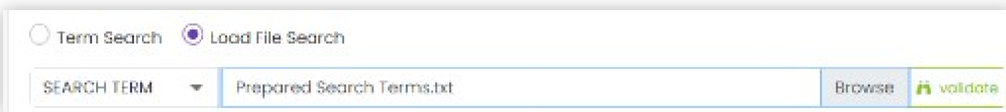
- CONTROL_NUMBER: This loads a text file containing a list of control numbers that are to be searched. This query also does not support other field searches and should only contain control numbers. And, like in INTERNAL_FILE_ID searches, the field should not be included.

NOTE: Among the above types of load file searches, only Search Term requires the Lucene index.

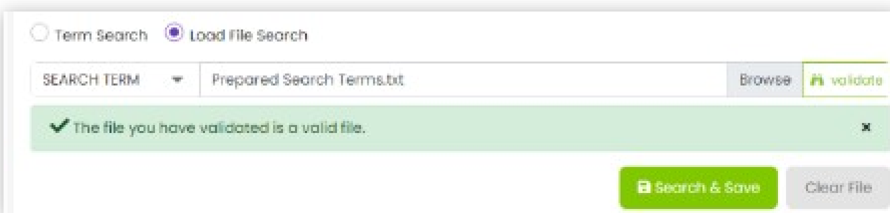
Click the Browse button and navigate to your load file.
To validate the load file, you wish to use and ensure it is in the correct format, click on the Validate button.

If the load file is valid, a message will display to confirm the validity.

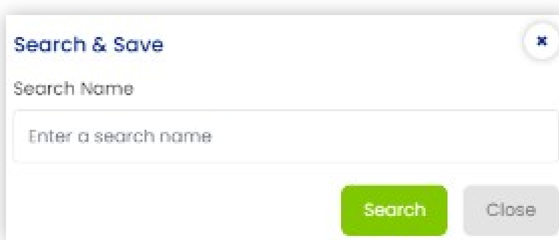
If the load file is valid, a message will display to confirm the validity.



Click the Search & Save button to save the search.



6. Enter a Search Name and click the Search button.



9.5.4 Field Search

VOD gives you the following Operator options when running a Field Search:

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EQUALS(=)	BETWEEN
LESSTHAN(<)	BEGINS WITH
LESSTHANEQUALTO(<=)	ENDS WITH
GREATERTHAN(>)	IS NULL
GREATERTHANEQUALSTO(>=)	IS NOT NULL

Field validations are in place to prevent searches with incomplete queries.

The following are the searchable fields in VOD:

- CONTROLNUMBER: Assigned control number do a document
- CUSTODIAN_NAME: Assigned custodian name
- DEFAULT_FULLTEXT_PREFERENCE: Select from EXTRACTED, TIFF_OCR, or REDACTED_OCR
- DETECTED_LANGUAGE_ALL: Documents with all identified languages
- DOCUMENT_NOTES: Documents with notes added
- EDOC_AUTHOR: Document author metadata
- EDOC_TITLE: Document title metadata
- EMAIL_ANY_ADDRESS: Email address or name in any of the email fields
- EMAIL_BCC: Email address or name in BCC metadata of an email · EMAIL_CC: Email address or name in CC metadata of an email
- EMAIL_ENTRYID:
- EMAIL_MESSAGEID:
- EMAIL_SUBJECT: Subject metadata in an email
- EMAIL_TO: Email address or name in TO metadata of an email
- EXPORT_FULLTEXT_PREFERENCE: Options are EXTRACTED, TIFF_OCR, REDACTED_OCR
- FILE_SIZE: Document’s native file size
- FOLDERS: Folders created within VOD
- FULLTEXT_SIZE: FullText file size
- FULLTEXT_TYPE: FullText file type
- GROUP_HASH_VALUE: Document with gGenerated family hash value
- HAS_HIDDEN_OBJECT: Yes/No field indicating whether hidden objects are present in a file
- HAS_SYSTEM_BATES: Yes/No field indicating whether a system bates number is present in a file
- INTERNAL_FILEID: Automatically assigned unique identifier
- IS_CENTROID_NDD: Search reference documents used for Near Deduplication

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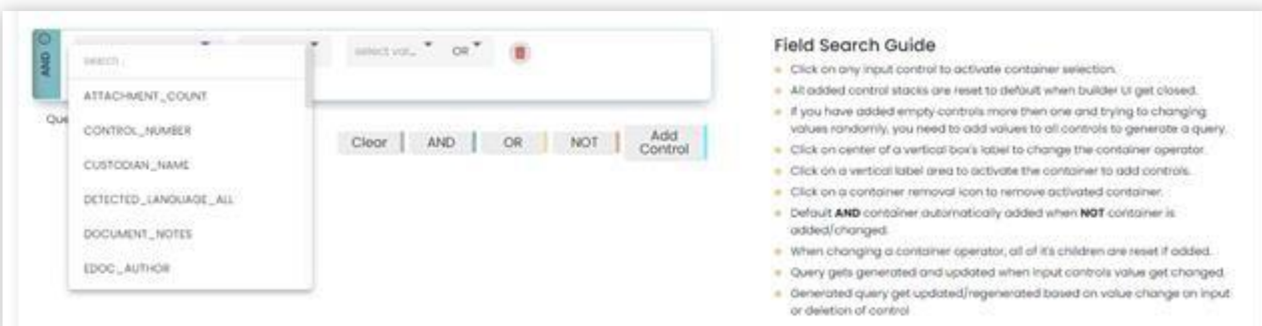
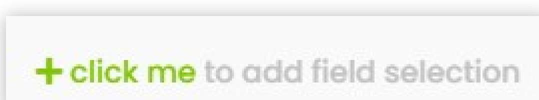
- IS_NOT_IN_REVIEWSET: Yes/No field indicating whether a document is included in a reviewset
- IS_PARENT: Yes/No field indicating whether a document is a Parent
- NEAR_DUPLICATE_GROUP_INTERNAL_FILE_ID: Populated with FileID of CentroID of near duplicate group
- NEAR_DUPLICATE_SIMILARITY_PERCENTAGE: Populated with near duplicate similarity percentage
- NEAR_DUPLICATE_GROUP_CONTROL_NUMBER: Populated with control number of CentroID of near duplicate group
- ORIGINAL_FILENAME: Documents with specified filename
- ORIGINAL_FILE_PATH: Documents with specified original file path
- RECOGNIZED_FILE_EXTENSION: Document's with specified file extension
- REDACTION_REASON: Documents with indicated reason for redaction
- REDACTION_SET: Documents within specified redaction set
- SAMPLING_NAME: Documents within specified sample name
- SLIP_SHEET_TEXT: Documents with specific text included in slip sheet
- TAGS: Documents with assigned tags
- MEDIA_PROCESSED_DATE: Populated with the date the media was processed.

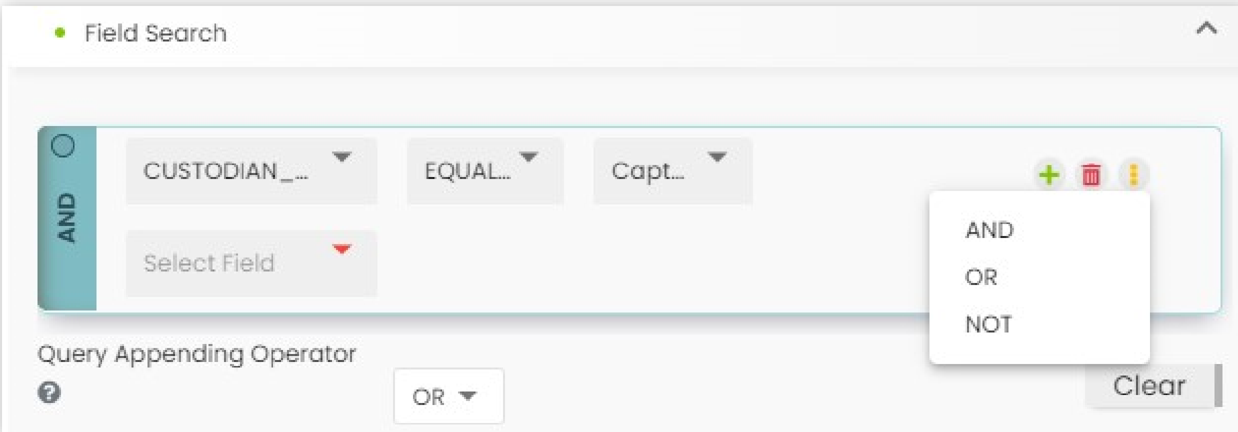


To compose a Field Search, you must click on the "click me" link.



At that point, the Select Field drop-down will display. As you use the drop-down lists to select the field and then your operator and content, the query being built is displayed on the Search Bar at the top of the dialog.

To add additional fields, click the AND, OR, or NOT buttons as shown in the example below. To delete an item from the search, use the Trash Can button.



To combine a Field Search with one of the other search types, create your Field Search criteria and then select the Query Appending Operator from the drop-down in the bottom right. Click one of the other search tabs and enter the additional criteria needed. Below is an example of a Field Search combined with a Fuzzy Search.

9.5.5 Wildcard Search

The Wildcard search enables you to use the wild characters described in Section 7.4 above. You will be able to see the wildcard expansion results and pick and choose which of those expanded terms you actually want to use in the search. This helps you narrow the search to smaller hits and avoid false positives. At the same time, you will be able to see what variations of a term or phrase are in the data.
Wildcard term expansion can be performed using the FULLTEXT, ATTRIBUTES or BOTH. After the term expansion, you can select multiple expanded terms and form the query for searching. You may also use the Show Term Count option to display the number of document hits for a specific term. Wildcard searches can also be combined with other searches using the ADD(OR) button.
Wildcard Search Examples:

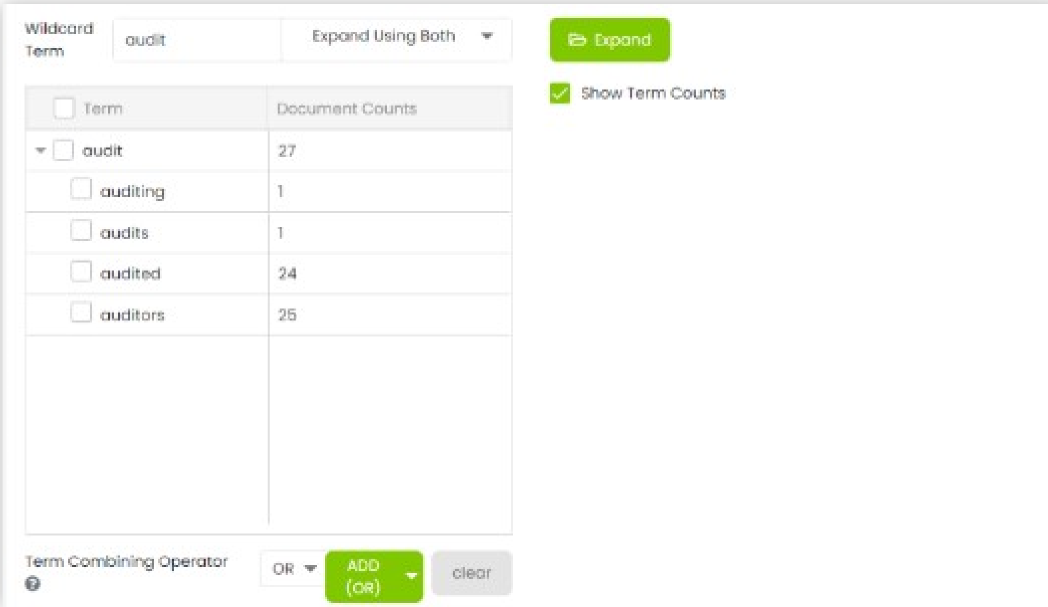
Searching for "*ght" could return eight, caught, height, etc., if these terms exist in the scope of your search.

Searching for “mat?h” could return match, matoh, mateh, etc., if these terms exist in the scope of your search.

NOTE: There is no need to specify * at the end of terms while expanding terms. By default, VenioOne adds * after each term in expansion if no wildcard character is specified.

1. Select Wildcard Search tab in Advance Query Builder.
2. Enter the wildcard term to expand in the Wildcard Term box.
3. Use the Expand Using… drop-down to expand the search term using Both, Fulltext or Attributes.

4. Optional: Use the Show Term Count check box to show the document counts for each expanded term.
5. Click the Expand button to display the terms.
6. Select the terms to search from the list using the checkboxes.
7. When you select multiple expanded terms, the default Term Combining Operator is OR. You can change this to AND or NOT, as desired, using the drop-down list.
8. Click the ADD (OR) button to add the terms to the Query Field.
9. Click the Search button to execute the search.



9.5.6 Fuzzy Search

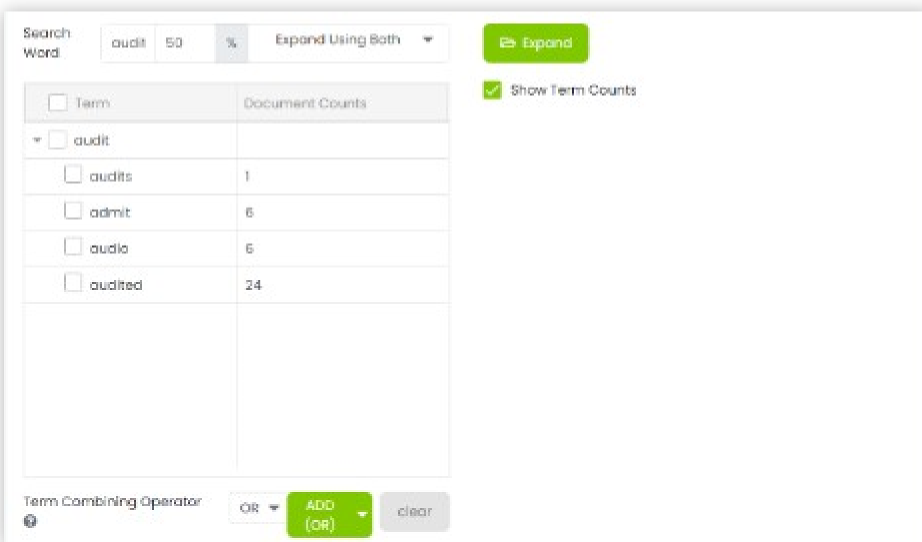
The Fuzzy Search enables you to find terms similar to the one you provide. This helps you to find misspelled words, such as people's names, or when you are unsure of the exact spelling of a term. Fuzzy search can search in either FULLTEXT, ATTRIBUTES or BOTH. After the expansion (finding variations) of the terms, you can select multiple expanded terms and form the query for searching. Fuzzy searches can also be combined with other search types using the ADD(OR) button.

Fuzzy Search Example:

A search for "fat" could return dat, fax, hat, pat, etc., if these terms exist in the scope of your search.

1. Select Fuzzy Search tab in Advance Query Builder.
2. Enter the fuzzy search term to expand in the Search Word field.
3. Optional: Adjust the Fuzzy Factor which defines the strictness of expansion. The default fuzzy factor is 50%. Increasing the fuzzy factor will search for less similar terms, while decreasing the fuzzy factor will search for more similar terms.
4. Use the Expand Using… drop-down to expand the search term using Both, Fulltext or Attributes.

5. Optional: Use the Hide Term Count checkbox to show the document counts for each expanded term.
6. Click the Expand button to display the terms.
7. Check the boxes next to the term(s) to search from the list.
8. When you select multiple expanded terms, the default Term Combining Operator is OR. You can change this to AND or NOT, as desired, using the drop-down list.
9. Click the ADD (OR) button to add the terms to the Query Field.
10. Click the Search button to execute the search.

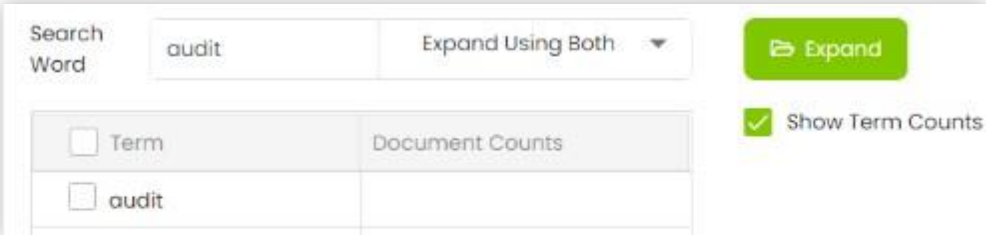


9.5.7 Synonym Search

The Synonym search enables you to list all the terms that are synonyms of the term you provide. Synonyms can be searched in either FULLTEXT, ATTRIBUTES or BOTH. After the expansion (finding synonyms) of the terms, you can select multiple synonyms found and form the query for searching.

Multiple terms can be expanded at the same time. For expanding multiple terms, separate each term with a space.

If any synonym for a term exists, but that term does not exist in the system, those synonyms will not be listed in the expansion window as shown below.



If needed, the expanded synonym list can also be exported to.csv file.

Synonym Search Example:

House is a synonym for "home". However, if the term *home* does not exist in the scope of data being searched, then the synonym *house* will not be listed in the synonym expansion box.

1. Select the Synonym Search tab in the Advanced Query Builder.
2. Enter the term(s) to find synonyms for in the Search Word field.
3. Use the Expand Using… drop-down to expand the search term using Both, Fulltext, or Attributes.

4. Optional: Use the Show Term Counts checkbox to show the document counts for each expanded term.
5. Click the Expand button to display the terms.

   The terms found (and counts for each term, if Show Terms Counts is selected) are displayed.

6. Check the boxes next to the term(s) to search from the list.
7. When you select multiple terms, the default Term Combining Operator is OR. You can change this to AND or NOT, as desired, using the drop-down list.
8. Click the ADD (OR) button to add the terms to the Query Field.
9. Click the Search button to execute the search.

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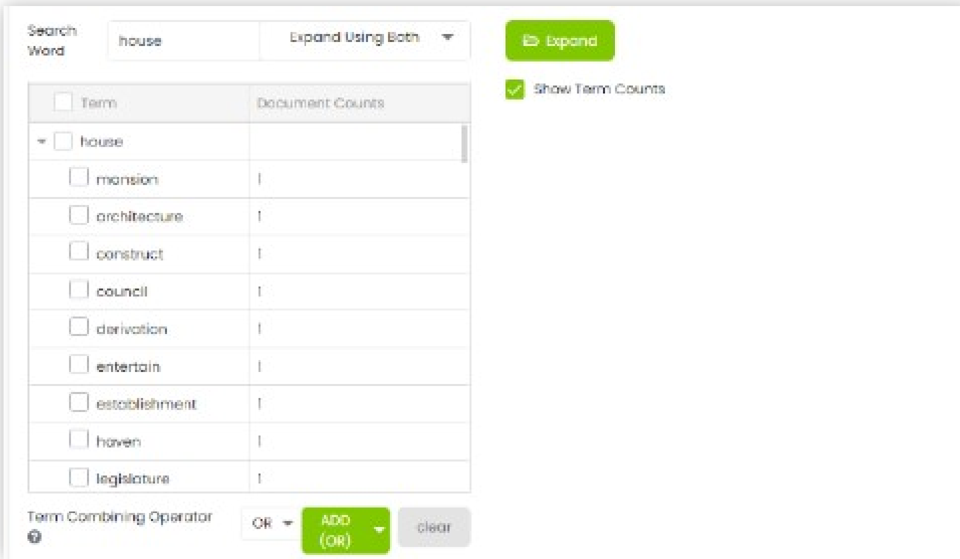

9.5.8 Tag History Search

The Tag History Search enables you to search for documents tagged/untagged with the selected tags. Multiple tags can be combined using a Boolean operator (AND, OR, NOT) to form complex queries. The Tag query can also be combined with other queries.

1. Select the Tag History Search tab in the Advance Query Builder.

Check one or more tags to search for in the Tag Name(s) list.

NOTE: When you select multiple tags, the default Tag Combining Operator is OR. You can change this to AND or NOT using the Tag Combining Operator drop-down (bottom left), as desired.

Add the tag (s) to the Search Query textbox by clicking the Add (OR) button.

NOTE: Use the drop-down arrow on the button to select the appropriate Boolean operator if you wish to combine the tags with an existing query in the Search Query textbox. If the Search Query textbox is empty, then selecting any Boolean operator has the same effect as there is nothing to combine with.

Click the Search button.

The files with the selected tags are displayed in the Document Table.

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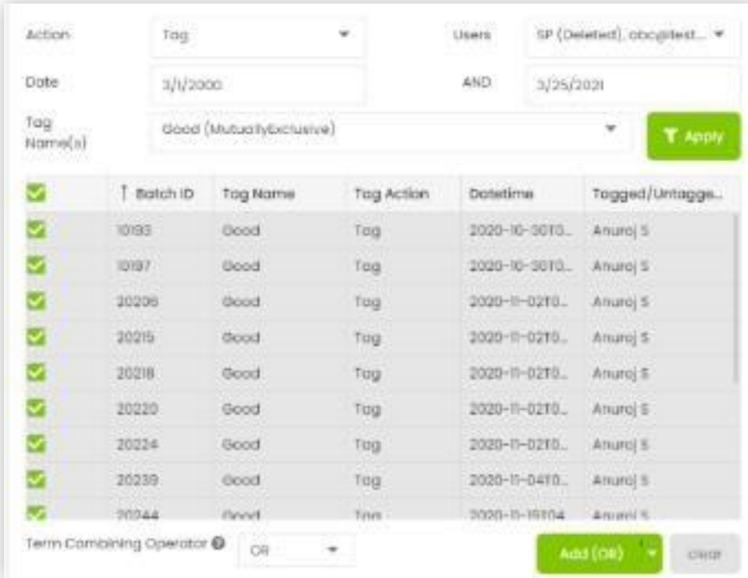


9.5.9 Review Set Batch Search

The Reviewset Batch Search enables you to search for the documents in a review set batch. Multiple reviewsets, batch statuses, and reviewers can be combined using a Boolean operator (AND, OR, NOT) to form complex queries. The Reviewset Batch Search query can also be combined with other queries.

5. Select the Reviewset Batch Search tab in the Advance Query Builder.
6. Check one or more Review Sets you wish to search for in the Reviewset drop-down list.
7. Optional: Select a status from the Batch Status drop-down list.
8. Optional: Select a reviewer from the Reviewer(s) drop-down list.
9. Click the Apply button.

   A list of the matching batches is displayed.

10. Check one or more items to search for in the Reviewset Batches list.

    NOTE: When you select multiple Reviewsets or Batches, the default Term Combining Operator is OR. You can change this to AND or NOT using the Term Combining Operator drop-down (bottom left), as desired.

    If we select Exclude option, the files are filtered in the following way:

    - Apply filters on first level files only- The first level file under the compressed file (archive) will be considered as Parent file and those files will not be excluded.

For e.g.: Apply a File Type Filter to exclude Multimedia File Types (Top Level only) on Project Settings. After ingestion, multimedia will come up inside compressed files as a Parent (IS_PARENT=YES)

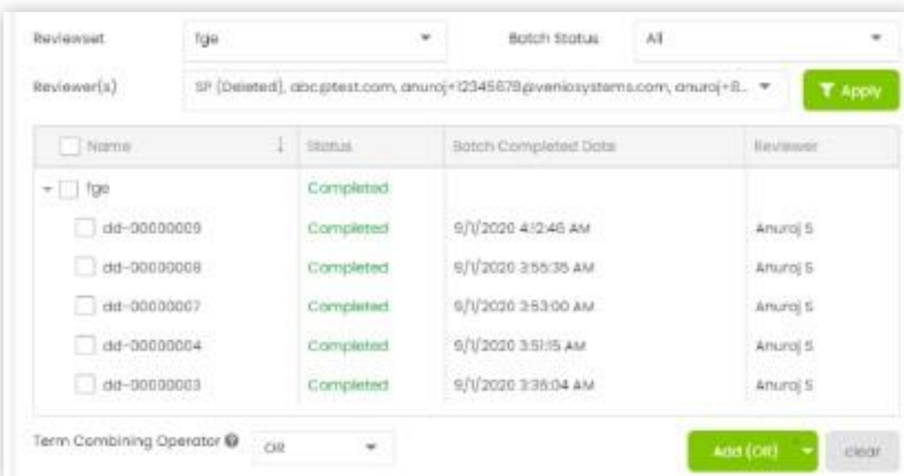
- Apply filter on parent level files only – The First level files extracted from Archive is considered as parent file.
- Apply extension on files in any level - This option will exclude files from all levels and might break family relationship.
- Do not apply filter on container file – This option does not filter any archive file (not related to its contents)

11. Add the Reviewset Batch(es) to the Search Query textbox by clicking the Add (OR) button.

    NOTE: Use the drop-down arrow on the button to select the appropriate Boolean operator if you wish to combine the reviewset batch(es) with an existing query in the Search Query textbox. If the Search Query textbox is empty, then selecting any Boolean operator has the same effect as there is nothing to combine with.

12. Click the Search button.

    The files with the selected reviewset batches(s)are displayed in the Document Table.



9.5.10 Non-Processable Search

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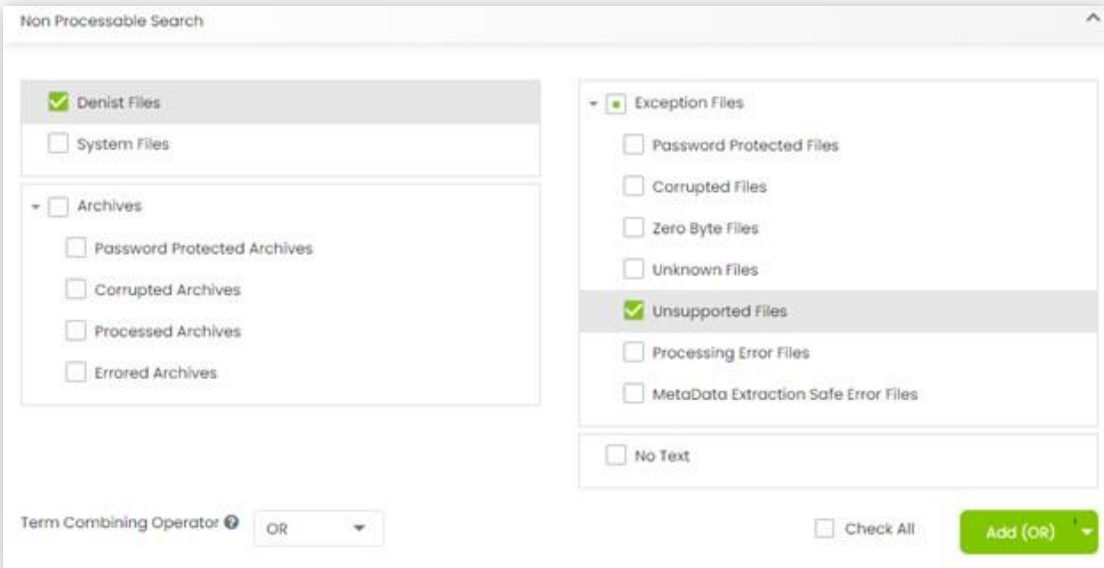
Normally, in search results we do not list system, denist, or archives files. In order to make those documents searchable, we have provided a search section for Non-Processable files. VOD supports the following non-searchable search fields:



- De-NIST Files: This searches for original denisted files. • Archive: This searches for original archive documents.

0 Password Protected Archives: This searches for archives that are password protected.
  - Corrupted Archives: This searches archives that are corrupted.
  - Processed Archives: This searches archives that are processed.
  - Errored Archives: This searches archives that are errored.
- No-Text: This searches all the original documents whose fulltext file does not exist. This includes images, archive, system and De-NIST files as well.
- System Files: This searches for original system files.
- Exception Files: This searches for Exception files.

0 Password Protected: This searches for original password protected documents.
  - Corrupted: This searches for original documents that are corrupted.
  - Unknown Documents: This searches for original documents that were not recognized by the system.
  - Non-Processed: This searches for original documents that were identified by the system but that could not be processed by the system.

Like any other field searches, non-processable field searches can be combined with Boolean operators.

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Example 1:

(IsArchive = "True") AND (IsPasswordProtected = "True")

This will search for all the documents that are password protected and are archived.

Example 2:

(IsDenist = "True" OR IsSystem = "True")

This will hit all documents that are either system or are De-NIST files.

NOTE: Tags cannot be applied in System and/or De-NIST documents. We cannot apply tags to archive documents either.

9.6 REGEX Searching

A regular expression or regex is a sequence of characters that define a search pattern. For example, phone numbers, Social Security numbers, or dates.

On the Search Bar, you can run regex searches as well. For regex searches, the syntax should be in the following format: FULLTEXT (REGEX ("reg_ex_here")) to search the text of the documents and ATTRIBUTES (REGEX ("reg_ex_here") to search the metadata of the documents. Any documents found will display. When doing a full text REGEX search, terms will be highlighted within the documents. REGEX searches can be combined with field searches as well.

For example; the syntax of some REGEX searches could be:

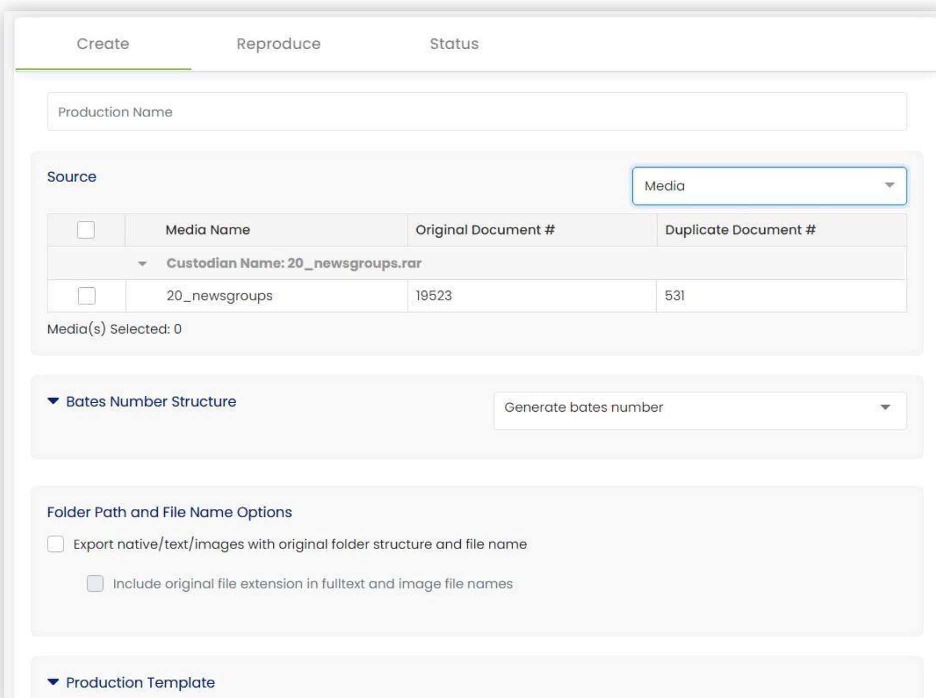
- FULLTEXT(REGEX("\d{1,3}"))
- ATTRIBUTES(REGEX("\d{1,3}"))
- (ATTRIBUTES(REGEX("\d{1,3}"))) OR CUSTODIAN_NAME = "Cust1"
- (FULLTEXT(REGEX("\d{1,3}"))) OR CUSTODIAN_NAME = "Cust2"

10 Production

Documents may be sent to production from the following three areas:

- Production link in the Case launchpad (shown below)
- Send to Production button on the Analyze Dashboard
- Send to Production button on the Review Dashboard

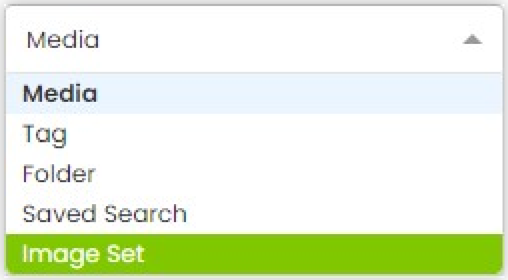
Either of those options will bring you to the Create Production dialog. You will note that there are also tabs at the top to Reproduce a prior production or check the Status of a production.



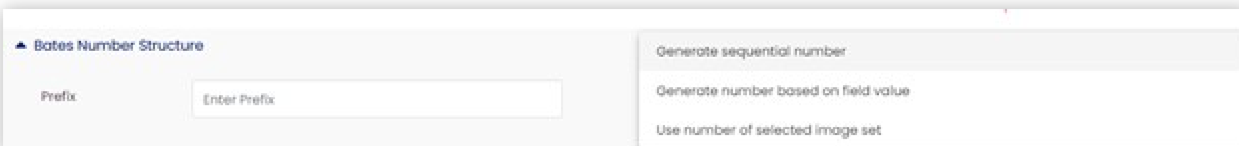
10.1 Create Production

1. Enter the Production Name in the Create Production dialog.

2. Select the Source from the drop-down list.



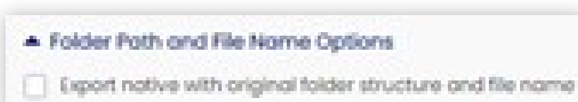
Follow the steps in sections 10.1.1 to 10.1.4 below to complete your media selection. 4. Enter the Prefix, Start Number and Padding in the Bates Number Structure section.



Under the Folder Path and File Name Options section, choose from the 2 options:

- Export native/text/Image with original folder structure and file name: If this option is selected, the export files will have the original folder structure and file name.
- Include original file extension in fulltext and image file names: If this option is selected, the export file will have its original extension appended to it.

NOTE: As shown below, for TOA projects, there will only be one option in this section.



3. Select a Production Field Template from the drop-down list
OR
Use the Create New Template button to create a new one (detailed instructions are in section 10.2.1 below).

4. Optional: Use the Advanced Options link to set additional options as described in section 10.2.1 below.
NOTE: The Export dialog of Index Only projects will not have Advanced Options.

Optional: View the production using the Production Summary link.

8. Click the Produce button to create the production.

A message confirming that Production is successfully queued is displayed.

10.1.1 Media

As shown in section 9 above, Media is the default source in the Create Production dialog. With media selected as the source, all the custodian names and media will be displayed with document counts for each media.

Select all or any custodian from the list and complete the rest of the options in the dialog.

10.1.2 Tag

With Tag selected as the source in the Create Production dialog, tags will be listed in the Select Tags drop-down. The number of documents that will be exported when selecting a tag will also be displayed.

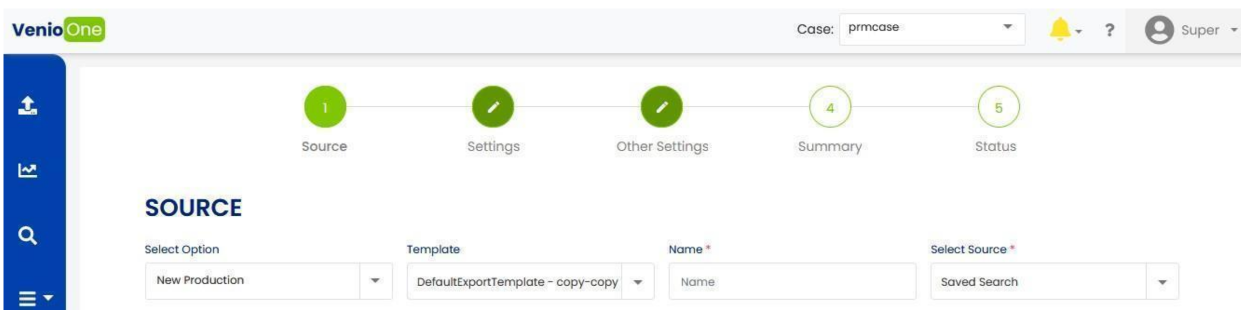
Select the desired tag(s) and the combining operator (OR or AND), and then complete the rest of the options in the dialog.

Selected tags may be removed by clicking the Delete button in the tag selection drop-down list.

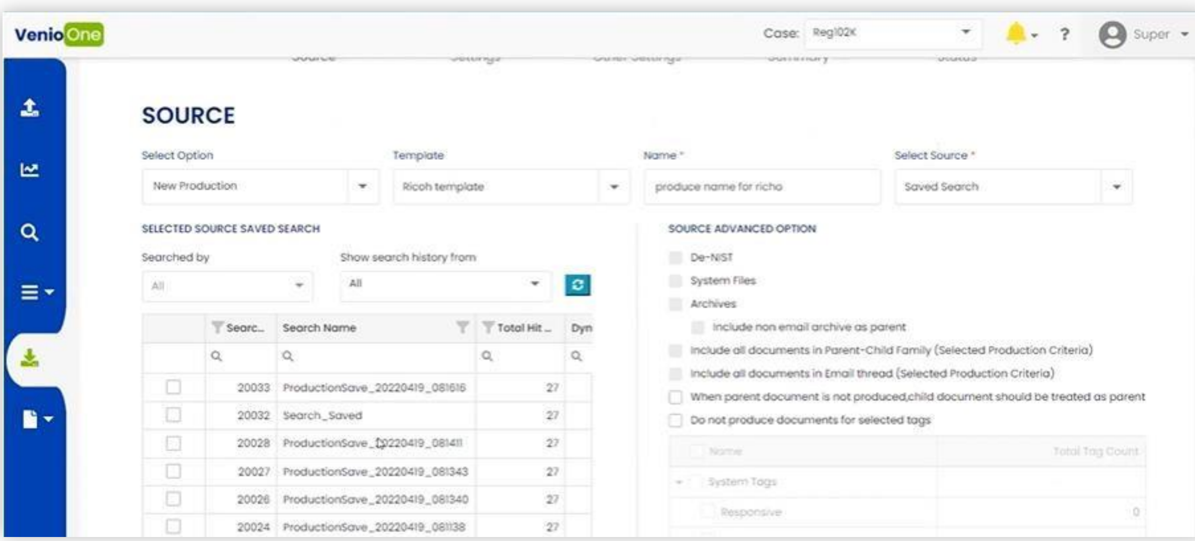
10.1.3 Save Search

With Saved Search selected as the source, Saved Searches will be listed in the Select Search drop-down. The number of documents that will be exported when selecting a search will also be displayed.

Select the desired saved search(es), and then complete the rest of the options in the dialog.

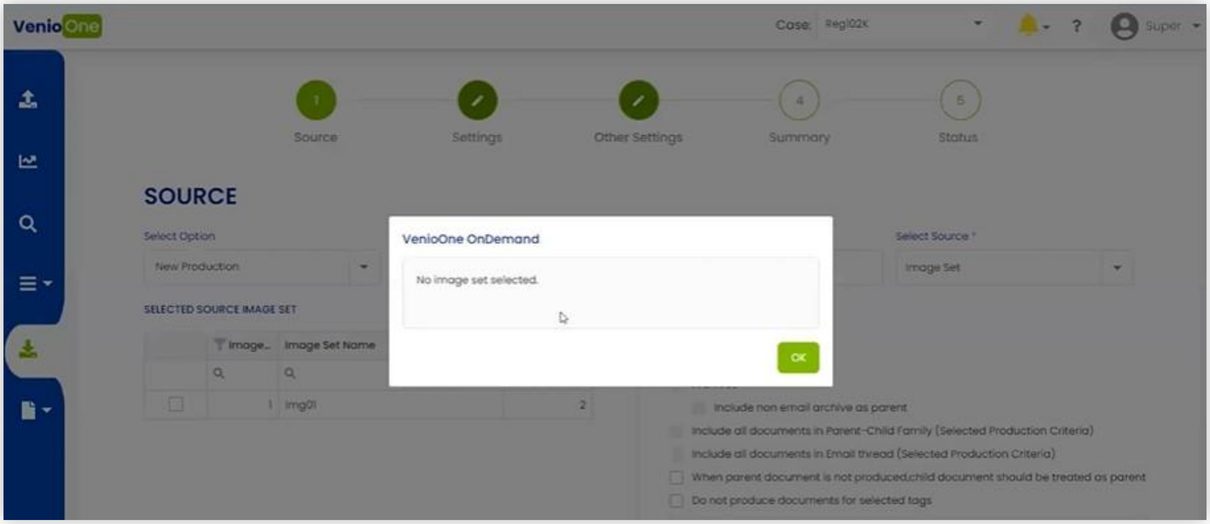


When the source selected is a Saved search, the search results contain checkboxes for each saved search result, allowing you to select the desired saved search from the list.



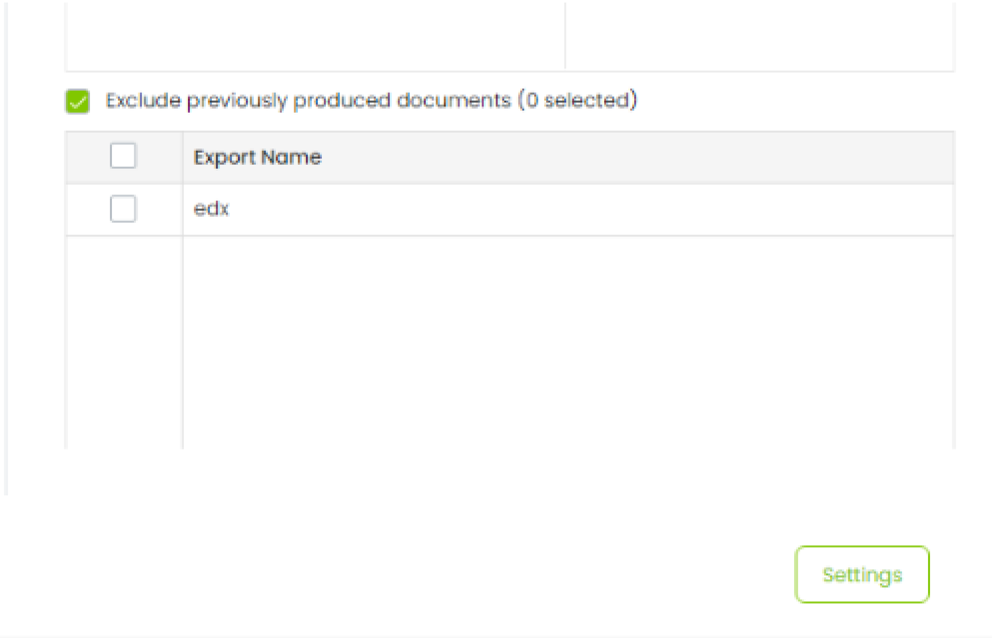
Select a saved search option from the search results, to continue to the next page.

Similarly, if the source selected is an Image Set, it shows the available image sets containing checkboxes for each image set, allowing you to select the desired image set from the list. Until you select source from the available list, you will not be allowed to move to the next page. A message is displayed that no image was selected.



Whenever we do the production, there is an option where we can exclude the documents which are already produced. This can be done via selecting the option in the production.

The option in the production is exclude previously produced document, When the option is selected, the productions are listed in the production option wizard. When the Exports are selected, the previously produced documents are not produced

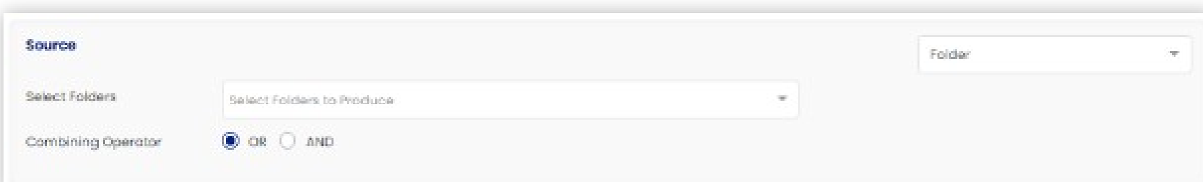


10.1.4 Folder

With Folder selected as the source in the Create Production dialog, Folders will be listed in the Select Folder drop-down. The number of documents that will be exported when selecting a folder will also be displayed.

Select the desired folder(s) and the combining operator (OR or AND), and then complete the rest of the options in the dialog.

Selected folders may be removed by clicking the Delete button in the folder selection drop-down list.



10.2 Production Field Template

The Production Field Template controls the fields which are included in the export. Either select a template from the drop-down list or create a new one. To see the fields for the selected production field template, click the View button. Use the Create New Template button to create a new production field template.

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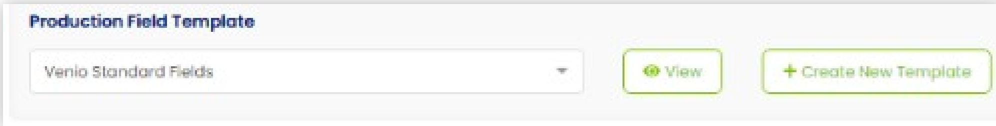
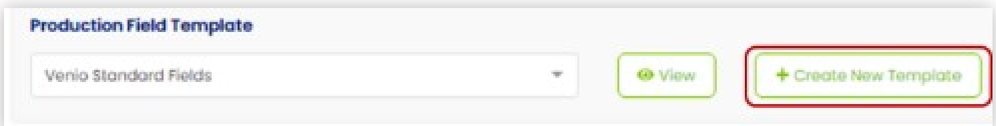
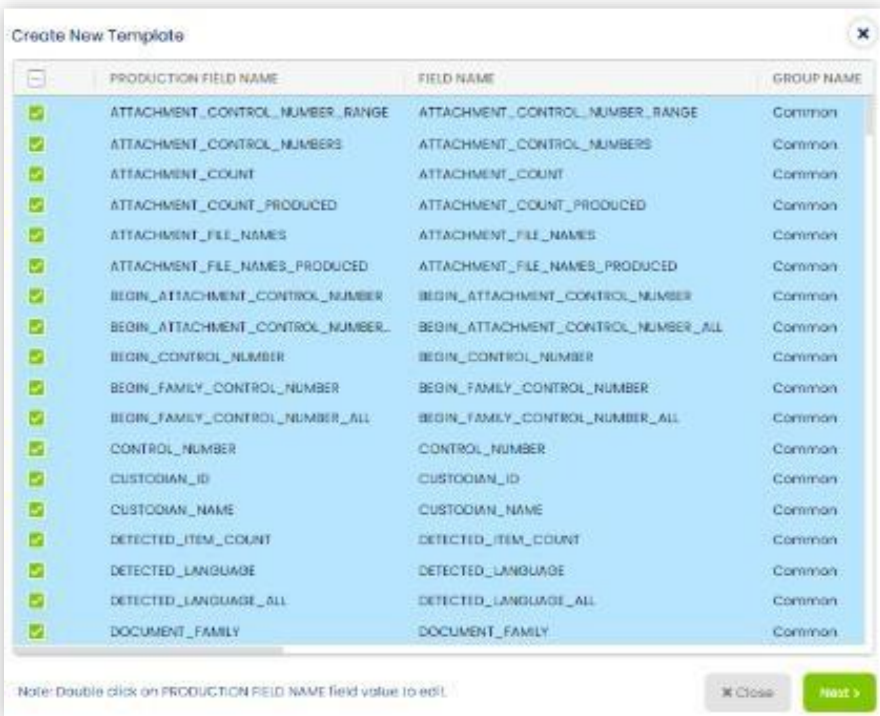


10.2.1 Create Production Field Template

1. Access the Create Production dialog.
2. Click the Create New Template button in the Production Field Template section.



The Create New Template dialog will display the available fields to be included. Note that there is a Group Name column. You will likely wish to exclude items in the Export, Image, and Work Product groups, so you may wish to have your VenioOne Administrator create a default Production Field Template with those fields not included.


Create New Template

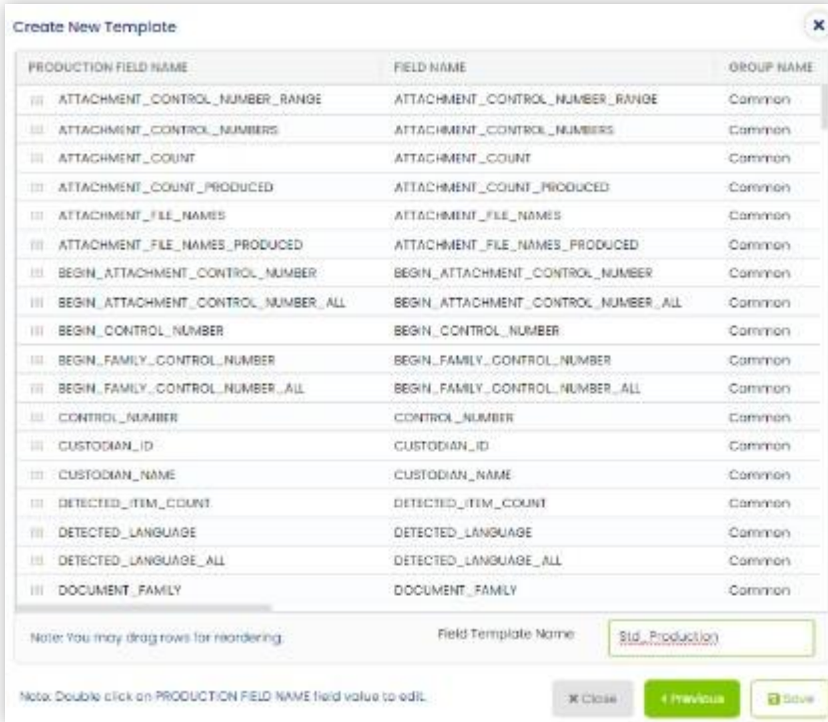
PRODUCTION FIELD NAME	FIELD NAME	GROUP NAME
ATTACHMENT_CONTROL_NUMBER_RANGE	ATTACHMENT_CONTROL_NUMBER_RANGE	Common
ATTACHMENT_CONTROL_NUMBERS	ATTACHMENT_CONTROL_NUMBERS	Common
ATTACHMENT_COUNT	ATTACHMENT_COUNT	Common
ATTACHMENT_COUNT_PRODUCED	ATTACHMENT_COUNT_PRODUCED	Common
ATTACHMENT_FILE_NAMES	ATTACHMENT_FILE_NAMES	Common
ATTACHMENT_FILE_NAMES_PRODUCED	ATTACHMENT_FILE_NAMES_PRODUCED	Common
BEGIN_ATTACHMENT_CONTROL_NUMBER	BEGIN_ATTACHMENT_CONTROL_NUMBER	Common
BEGIN_ATTACHMENT_CONTROL_NUMBER_	BEGIN_ATTACHMENT_CONTROL_NUMBER_ALL	Common
BEGIN_CONTROL_NUMBER	BEGIN_CONTROL_NUMBER	Common
BEGIN_FAMILY_CONTROL_NUMBER	BEGIN_FAMILY_CONTROL_NUMBER	Common
BEGIN_FAMILY_CONTROL_NUMBER_ALL	BEGIN_FAMILY_CONTROL_NUMBER_ALL	Common
CONTROL_NUMBER	CONTROL_NUMBER	Common
CUSTODIAN_ID	CUSTODIAN_ID	Common
CUSTODIAN_NAME	CUSTODIAN_NAME	Common
DETECTED_ITEM_COUNT	DETECTED_ITEM_COUNT	Common
DETECTED_LANGUAGE	DETECTED_LANGUAGE	Common
DETECTED_LANGUAGE_ALL	DETECTED_LANGUAGE_ALL	Common
DOCUMENT_FAMILY	DOCUMENT_FAMILY	Common

Note: Double click on PRODUCTION FIELD NAME field value to edit.

Close | Next

Select the fields to be included and click the Next button.

The Create New Template dialog displays the fields you have chosen.



If needed, change the field order by clicking and dragging the items using the button at the beginning of the row.
If needed, double-click the Production Field Name value to edit the name.
Enter the Field Template Name.
Click the Save button to save the template
OR
Click the Back button to change the fields that are selected.

The new created template will be listed in the template drop-down list.

10.2.2 View Production Template Fields

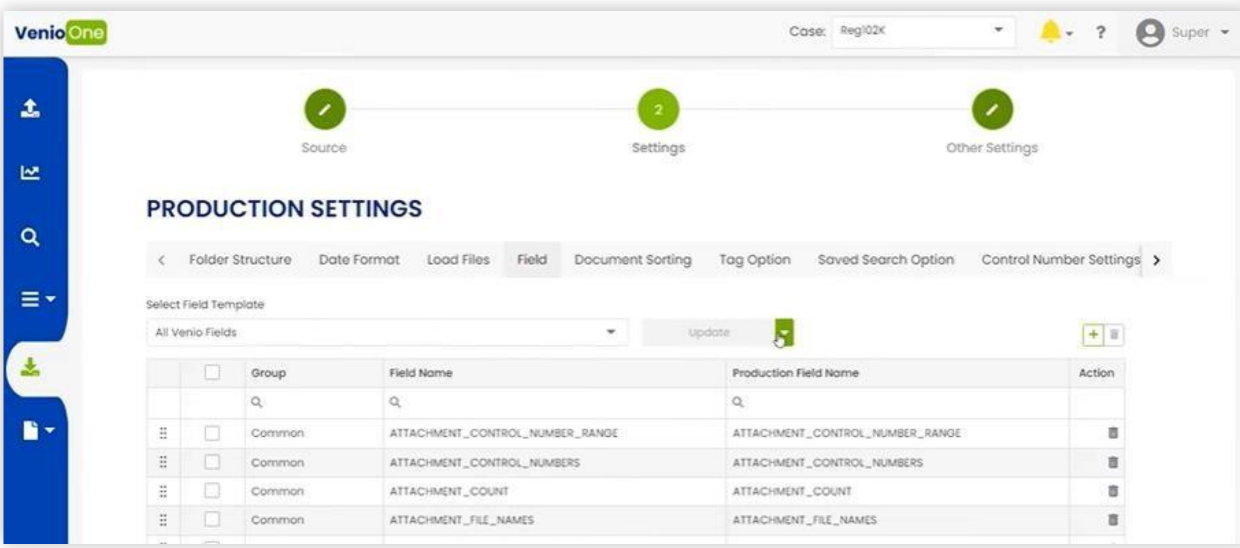
To view the fields of a production field template, select the template from the list and click the View button.

The template fields will be displayed in the Export Field Details window.

10.2.3 Edit Production Field Template

You can edit the production template fields using the Edit Production Field Template option. After making the desired changes, you can save the new settings for a production template field.

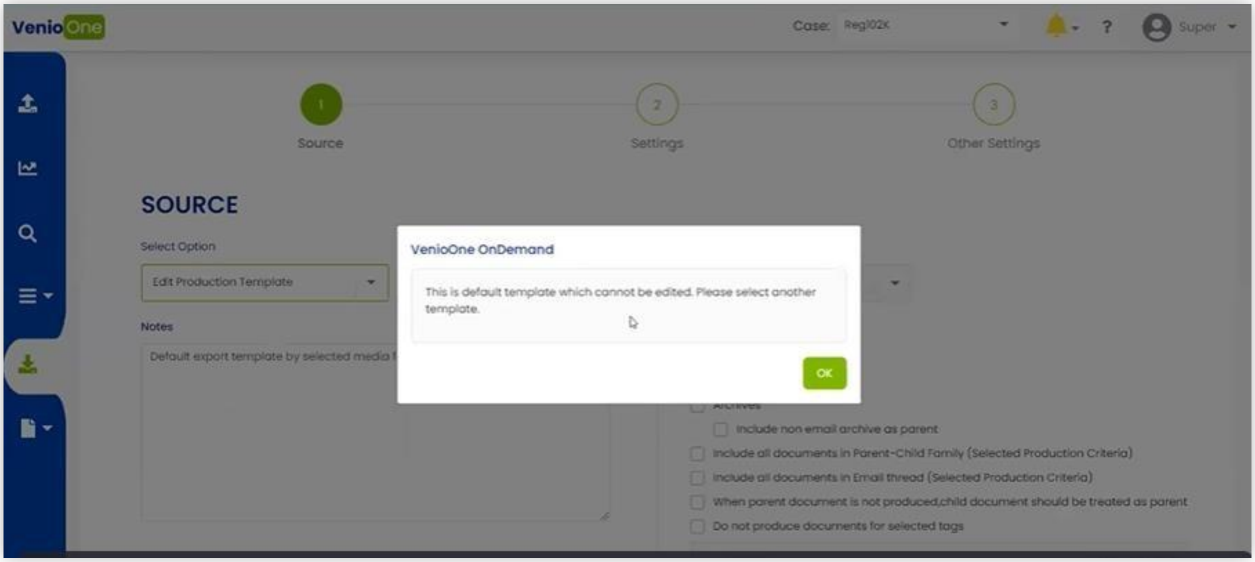
You cannot edit the default production templates fields. When you select a default field template from the list, the corresponding Update button is disabled, restricting any modification to the production template fields.



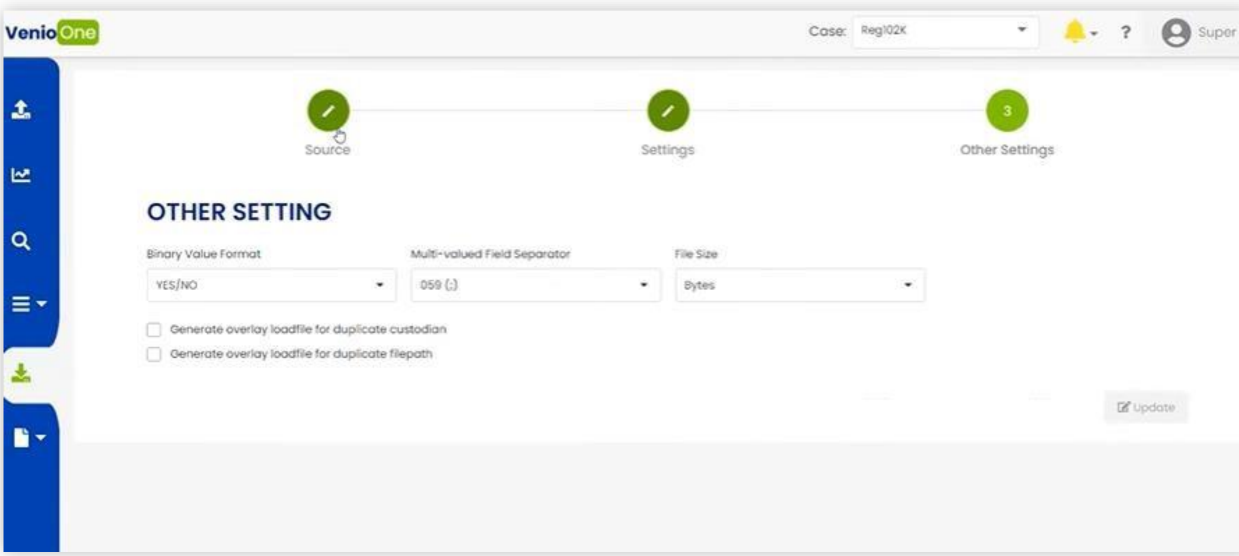
10.2.4 Edit Production Templates

You can edit the production templates using the Edit Production Template option. After making the desired changes, you can save the new settings for a production template.

However, you cannot edit the default production templates. When you select a default template from the list and try to edit, the following message is displayed



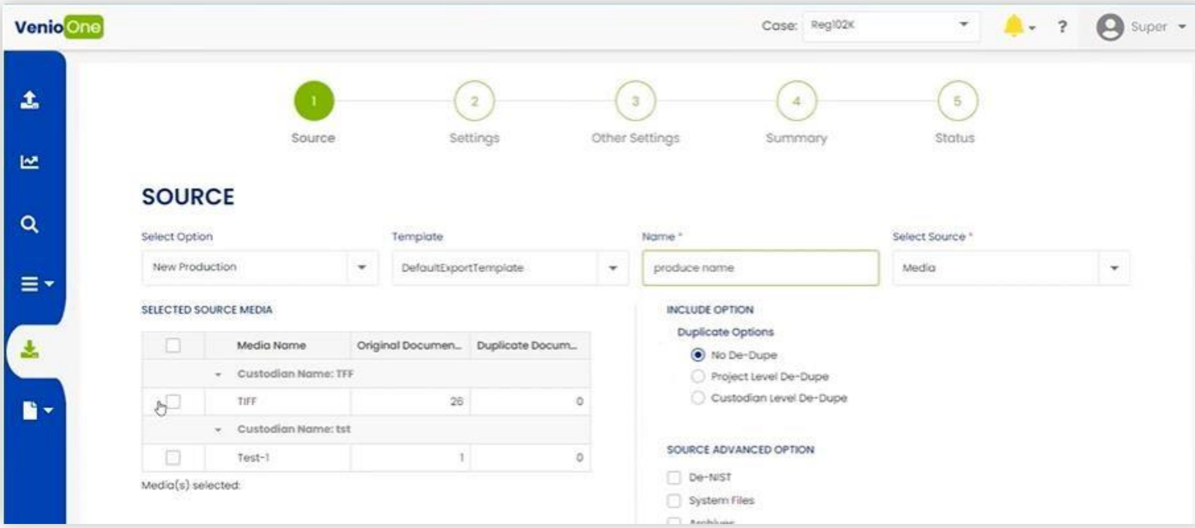
Click OK to view the settings of the default template. The Update button for a default template is disabled in Other Settings page.



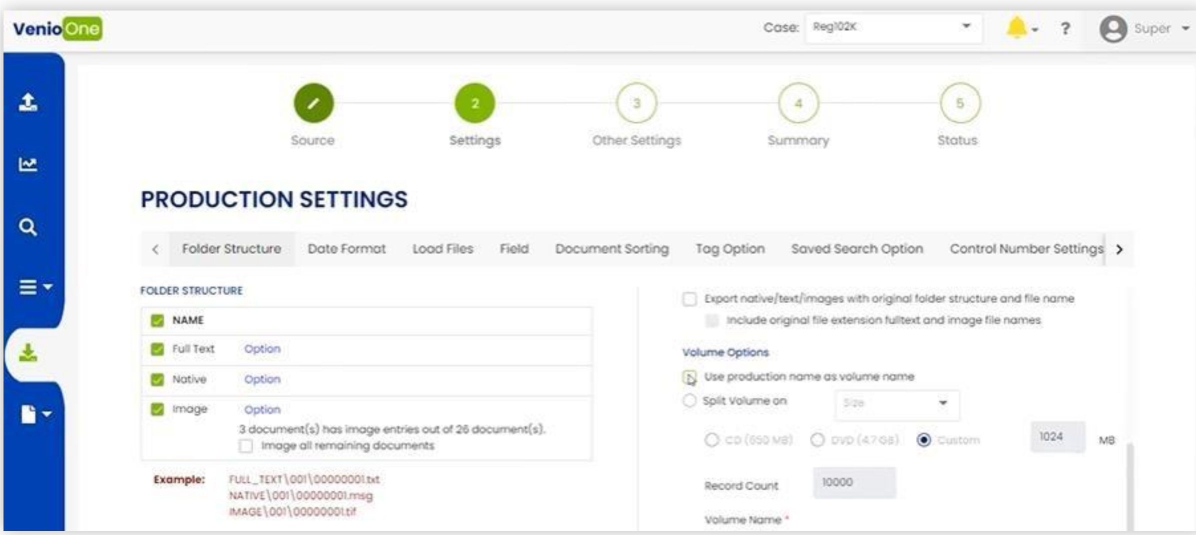
10.3 Production Volume Naming

Use the volume name same as the production name in advanced option of folder structure.

1. In the Source page, enter the production name under Name text box.



2. Click Settings. Under the Volume Options, select the checkbox for the Use production name as volume name. It is unchecked by default.



3. By selecting this option, the prefix to the Volume Name becomes the production name as shown:

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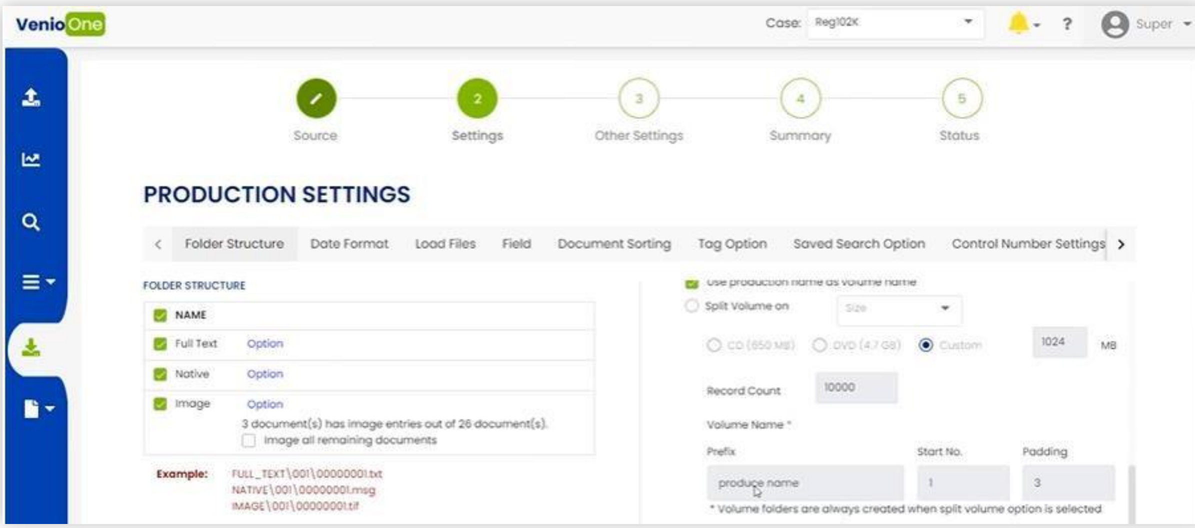


1. If the option is checked, the changed production name is reflected on the volume name/volume prefix.

10.4 Advanced Options

Click the Advanced Options link to open the Advanced Options, which include the following sections:

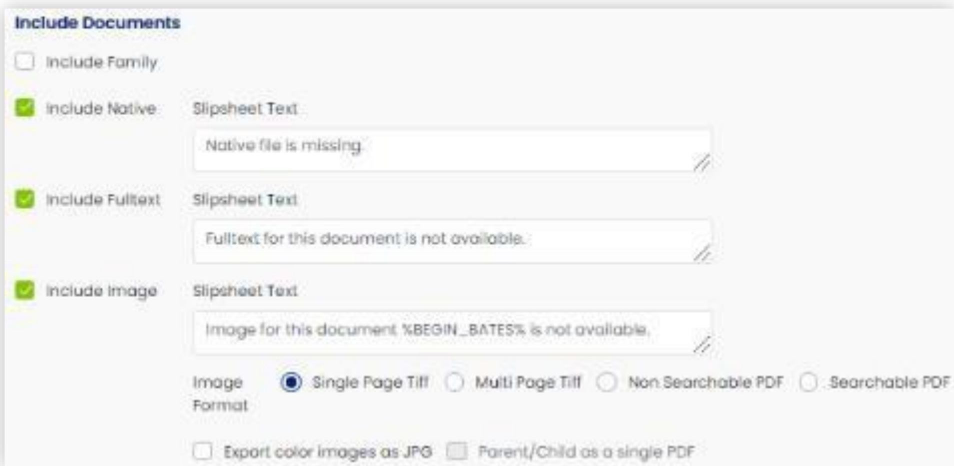
- Include Documents – specify which document formats to include (Native, Fulltext or Image) and whether to include family documents
- Exclude Documents – designate tags to be excluded and/or whether to exclude previously produced documents
- Production Format – specify data and image load file formats to create
- Endorsement Options – indicate whether to burn redactions onto images and where to add Bates stamping or Confidential endorsements

The specifics for each part of the Advanced Options are included in the sections below.

NOTE: Advanced Options are not available in TOA projects.

10.4.1 Include Documents

If these options are used, folders for Fulltext, Native and/or TIFF files will be created. Individual files are exported, and their corresponding paths are tracked in the VenioOne database.

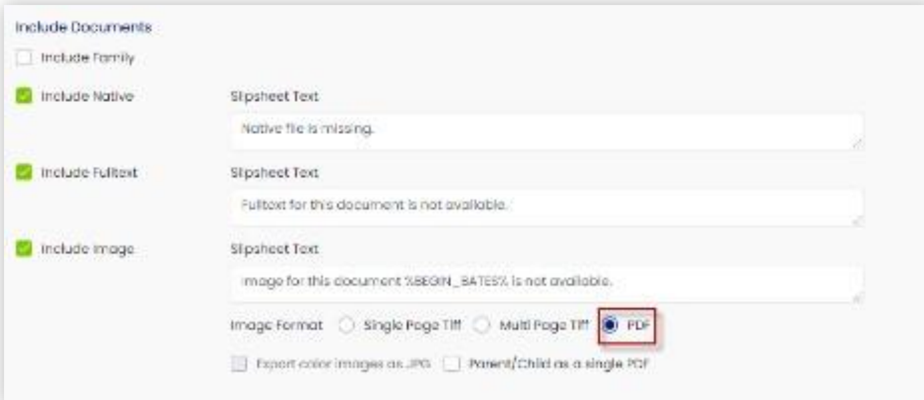


- Include Family: With this option enabled, all related child documents are also exported when the parent document is exported.
- Include Native: Export can be completed either including or excluding Native documents, and you may enter the desired text to be generated as the slipsheet placeholder for missing documents.
- Include FullText: Export can be completed with or without the full text format, and you may enter the desired text to be generated as the slipsheet placeholder when the full text is missing or cannot be exported.
- Include Image: Export can be completed either including or excluding document images, and you may enter the desired text to be generated as the slipsheet placeholder for missing images. You may also designate the image format.

10.4.1.1 PDF Image Export

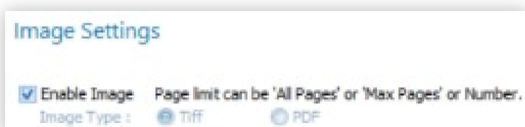
Documents which are imaged in PDF format can be exported as PDF files. For converting the files to PDF, choose the PDF option as in the image below and complete the export process. The exported images will be in PDF format.

If you wish to export the PDF images in TIFF format, the Single Page Tiff or Multi Page Tiff options can be chosen.



NOTE: To enable the PDF setting export in VOD, the value of ENABLE_PDF_IMAGING should be set to 1 in tbl_pj_controlsetting.

Only projects which have the image setting of PDF will display the PDF export option in VOD. This setting is part of the Project Setup Wizard in the Desktop Console and cannot be changed after the project has been created.



10.4.2 Exclude Documents

Documents can be excluded from production using the options in the Exclude Documents section.

10.4.2.1 Exclude Documents by Tag(s)

Check the option to Exclude Documents by Tag(s) and select the tag(s) from the list.

10.4.2.2 Exclude Already Exported Documents

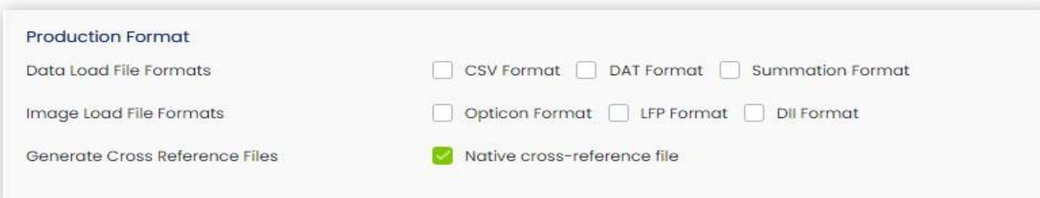
Simply select the checkbox to Exclude already produced documents, and those documents which have already been produced will not be exported.

10.4.3 Production Format

These options are used when data and/or image load files are needed for production or export. Generally, this is done to aid in the process of importing VenioOne data into another system.

- The load file will contain fields and information such as media ID, hash value, Group ID, export path, tags, etc.
- Folders for Fulltext, Native and TIFF files will also be created when using the Include Documents option described above. Individual files are exported, and their corresponding paths are inserted into the load file.
- Error logs will be generated if any errors occur during export.

To specify export formats, in the Production Format section, place checks to choose your export format(s).



NOTE: For Index Only projects, you will likely want to generate a cross reference load file that contains the relative file path and control number of the exported documents. To do this, select the Native Cross-reference file check box.

10.4.3.1 Data Load File Formats

- CSV Format - File you may open as an Excel sheet containing the details of the documents.
- DAT Format -.DAT (text-based) file with the details of the documents.
- Summation Format –EDII file with the details of the documents.

10.4.3.2 Image Load File Formats

If any of these options are selected, a separate load file is created for exported images.

- Opticon Format
- LFP Format
- DII Format

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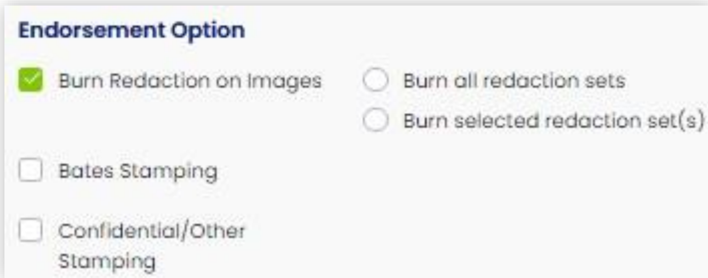
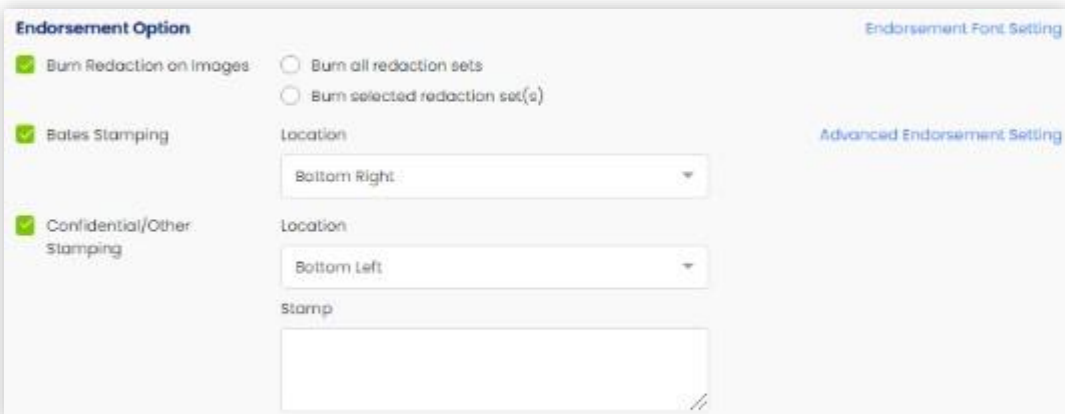
10.4.4 Endorsement Options



In the endorsement option section, you can also brand the images during export if you are exporting TIFF images. When items are selected, additional options and links are displayed as shown below:



Select from the options described below:

- Endorsement Font Setting link: Displays options for setting the font and size for the endorsements.
- Burn redaction on image: Makes the redactions permanent in the exported tiff files.

  Additionally, you may use the radio buttons to select which redaction set annotations are made permanent.

  0 Burn all redaction sets
  ○ Burn selected redaction set(s)

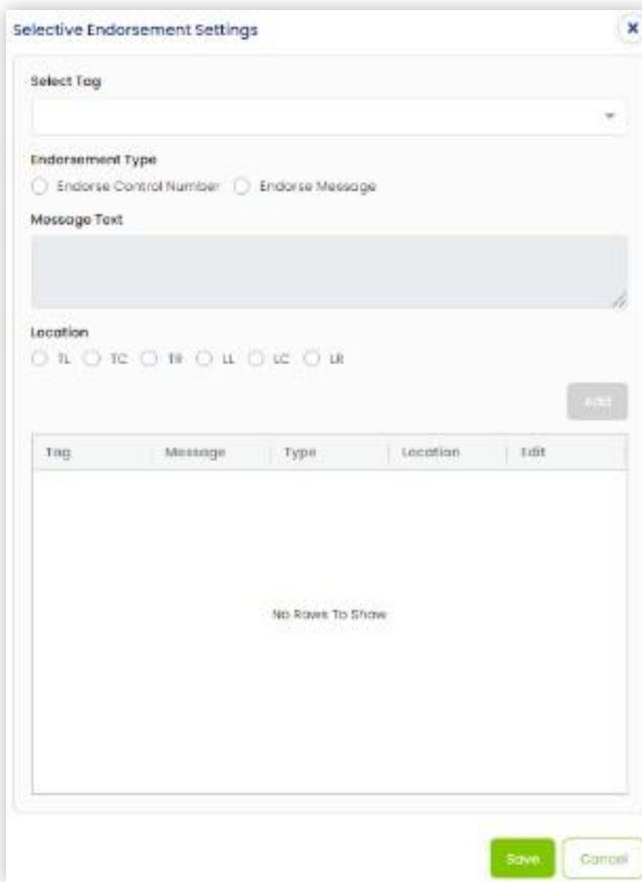
However, for project with PDF as image type, only Burn Redaction on Images checkbox is visible (and Not the radio buttons) which will by default burn all provided redaction/s for that file during export.

- Bates stamping: Add the bates number to the exported tiff files.
  - Set the location using the Location drop-down.
  - You may choose from Left, Right or Center on the Top or Bottom of the image.

- Confidential or other stamping: Add the word Confidential or other text to the exported tiff files.

  - Enter the desired text in the text box.
  - Set the location using the Location drop-down.

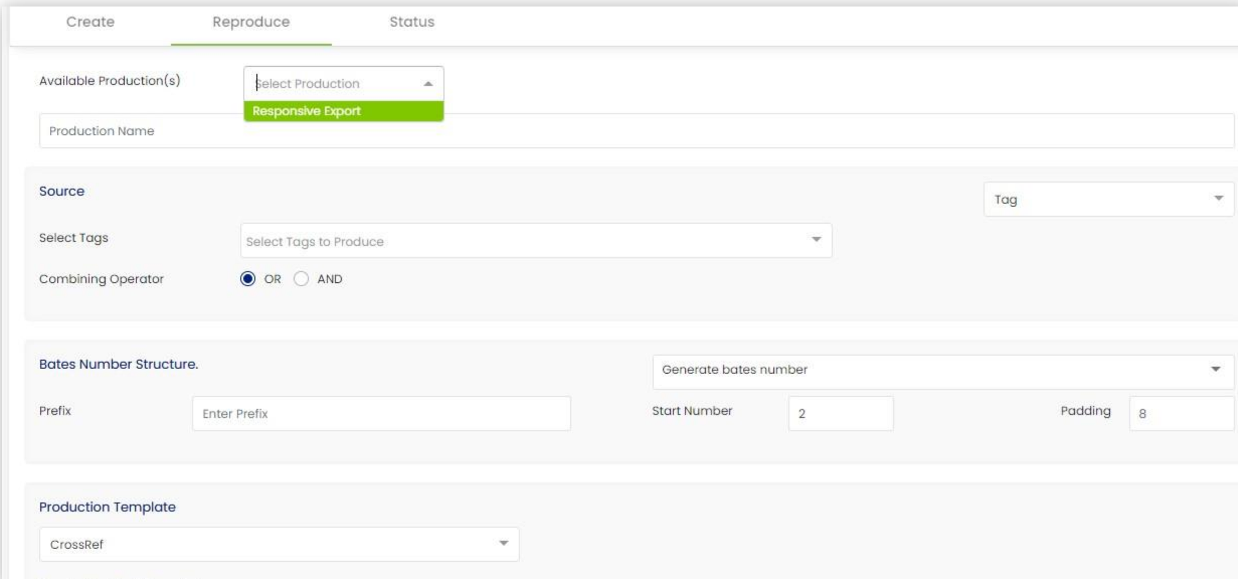
- Advanced Endorsement Setting: Enables the creation of a specific endorsement type and location for specific tags. After selecting the tag from the drop-down list, enter the endorsement information and click the Add button. When finished, click the Save button to save these changes.



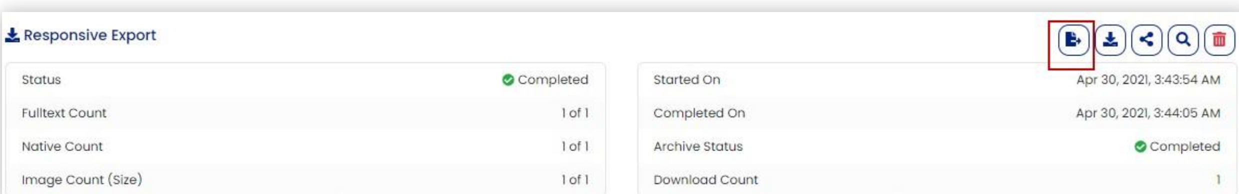
10.5 Reproduce a Production

You may reproduce items that have already been exported. There are two ways to reproduce files:

- Within the Production Dashboard, click the Reproduce tab to view items already produced. Select the production to be reproduced from the Available Production(s) dropdown list. Only exports which are completed will be listed.



- Within the Status tab of the Production Dashboard, click the Re-export button.



You will be able to edit some of the export settings and then queue the re-export.

NOTE: Re-exported files will not have the Reproduce button on the Production Status page.

10.6 Ability to re-export more image pages

With this new enhancement when an original export had a lesser number of image pages, now in the Re expert we can produce more number of image pages. On doing so new bates numbers are assigned based on the page number of newly identified pages of the image, for example, if the original export had only three pages for a document and during the Re expert if same document now has 12 image pages, then from image page number 4, new bates will be generated with page number suffixed at the end of the control number for the exported document.

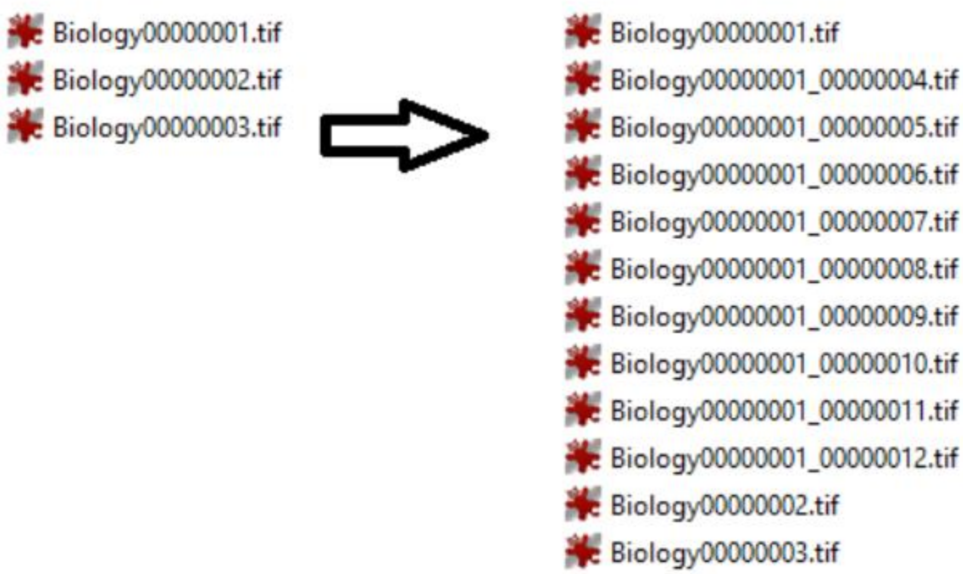
Examples

1)When sequential or continuous bate was used in original export

Original export
Number of image pages of a document = 3

Re export
Number of image pages of a document = 12

Check the bate assignment in export (in the left) and in the reexport (in the right) in below screen shot.



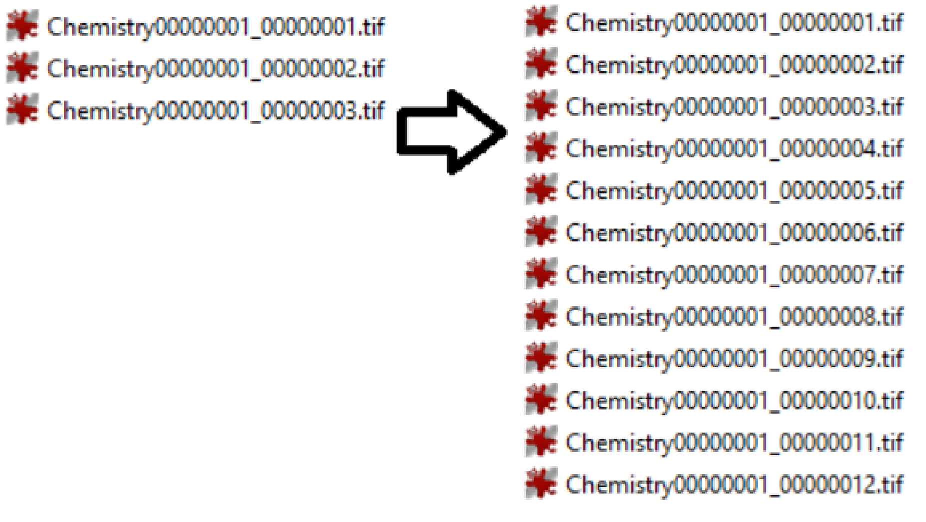
From page number 4, the application identifies a new page, and thus generates new image bates from this page onwards.

2) When page level bates and starting from first page, was used in original export

Original export
Number of image pages of a document = 3

Re export
Number of image pages of a document = 12

Check the bate assignment in export (in the left) and in the reexport (in the right) in below screen shot.



From page number 4, the application identifies a new page, and thus generates new image bates from this page onwards.

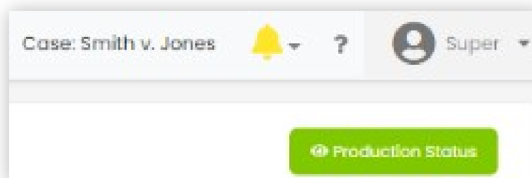
Reverse case, that is if during reexport, the image pages are less

In this case there is no change in the behavior, it should reproduce the same number of image pages as before.

Note - The examples 1 and 2 above are cases when a document had images during both export and reexport. It might be possible that during export, the image were not at all present for the document, and slipsheet has been exported instead. Or also for the case when document was sent to tiff as slipsheet rather than image. In either case, the behavior would be the same, that is after export the document has images, and then if reexport was kicked off, it will add page number suffixed in newly generated image bates.

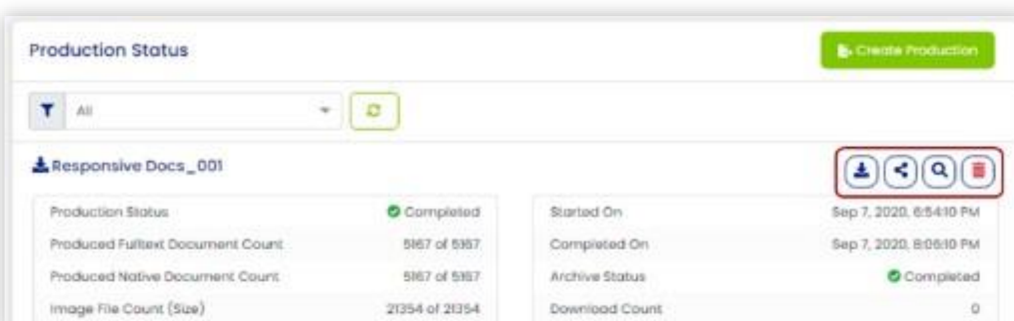
10.7 Production Status

You will be notified within the Notifications in VOD when the production starts and is completed. Both notifications have a link to view the production status.



After the production is queued, you may also view the production status by clicking the Production Status link at the top right corner of the Create Production screen.

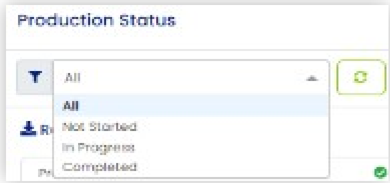
A page displaying the status of the queued production job displays.



There are links to Download, Review, Delete or Share the production.

Filter the production job list by status using the View By drop-down list. The display options are:

- All
- Not Started
- In Progress
- Completed



10.6.1 Share Production Download

Productions can be shared with internal or external users similar to the way documents are shared. You will only see the option to share externally, if that has been enabled in your environment.

10.6.1.1 How to Share Production Download

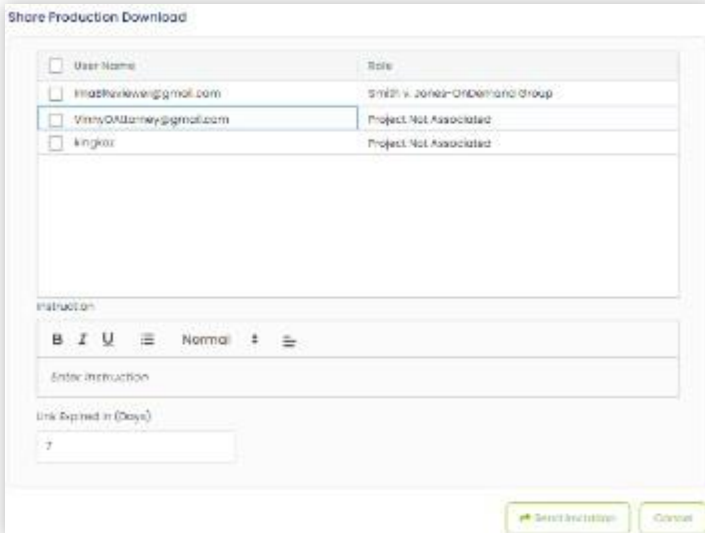
Click the Share production download button ().

The Share Production Download dialog will be displayed.

Select internal users from the list.

NOTE: Users who are not registered in VOD are considered external users.

If needed, select the checkbox to Share production…to external user.
Choose the external user from the list or enter their email address(es).
Enter any instructions you would like for the recipients to receive.
Select the number of days in which the invitation will expire.
Click the Send Invitation button.



A message will be displayed to confirm the link has been successfully sent.

Click OK to dismiss the confirmation.

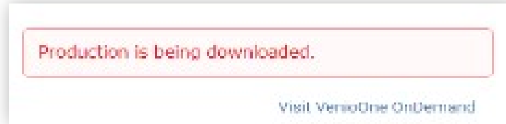
10.6.1.2 Share Recipient Instructions

The recipients of the shared production will receive an email from VenioOne containing a link and security code. When clicking the link in the email from VenioOne, external users will be directed to the Login Verification page in their Internet browser.

The recipient should enter the security code from the email and click the Login button.

If needed, the security code can be regenerated. Simply click the Regenerate button to send a new security code in a new email.

After entering the correct security code and logging in, the production download will be started, and a message will be displayed to confirm the Production is being downloaded.



10.6.2 Download or Review a Production

Instead of sharing as described above, it may be necessary to download the export or review the documents within VOD.

From the Production Status dialog, VOD users may choose to download or review an export.

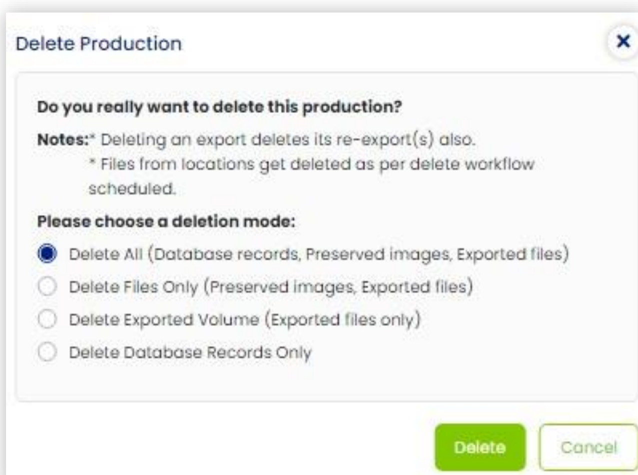
- Click the Download link and the exported files will be downloaded containing any load files.
- Click the Review link and you will be redirected to the VOD Review dashboard, which will display only those documents that have been exported.

10.6.3 Delete a Production

Production exports may need to be deleted.

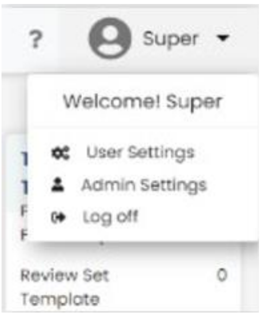
1. From the Production Status dialog, click the Delete button.
2. Choose a deletion type from the Delete Production dialog.
3. Click either the Delete button or Cancel.

A message will display to confirm the deletion. The production will also be removed from the Production Status list.

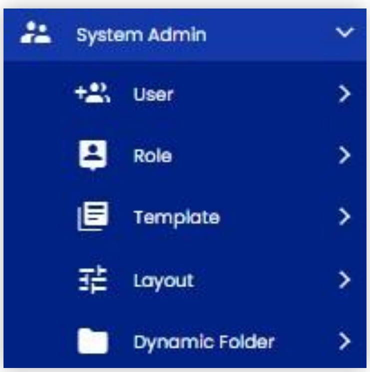


11 System Admin Settings

Both User and Admin Settings are found under drop-down arrow next to your name in the upper right corner of the VOD screen. User settings contain individual user preferences. Admin Settings may be accessed by someone with Admin level permissions in VenioOne.



The System Admin settings control the following areas:



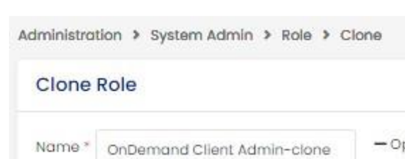
View Edit Clone Review Analyze Delete

The following action buttons are common within both the System and Case Admin modules.

Easy Navigation

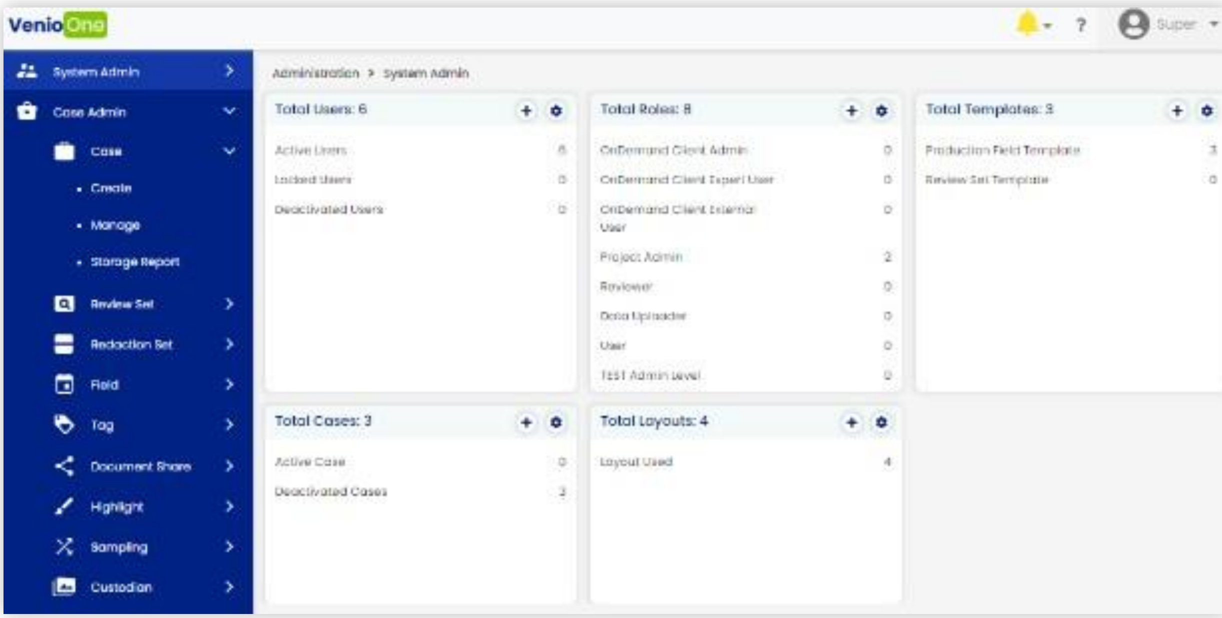
When making Admin Setting changes, a hyperlinked breadcrumb list of your location is displayed and may be used to quickly navigate to another area.



11.1 System Admin Dashboard

Admin Settings > System Admin

The System Admin Dashboard displays cards (shown below) for all major functions under System Admin. The buttons on the Cards may be used as shortcuts to Create or Manage the areas/items under each card.



11.1.1 Spam DB configuration

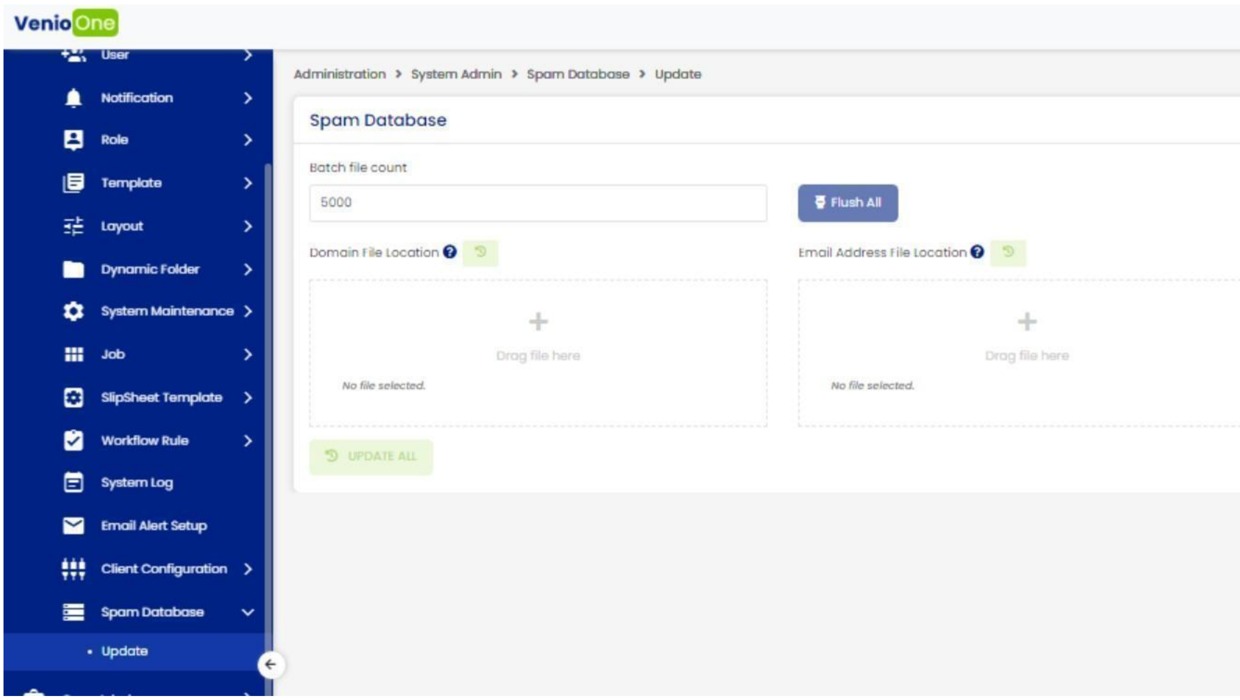
The Spam Database contains domains and/or emails addresses that are spam. You can add/update the spam database using text load files containing the domains and/or email addresses that are considered spam. Load filed should contain one entry per line. VenioOne will create a tag for the files that match the entries in the Spam Database.

Note: You can manually add/remove domains and email addresses, as needed.

Spam tagging of files will not be available during processing, if the Spam Database does not contain any entries.

Navigate to Administration > System Admins > Spam DB.

The Spam Database Update dialog will be displayed.



Enter Batch File Count.
Ensure updated files are placed in the Domain File Location and/or Email Address File Location.
Add the domain file location by Drag File here in the Domain file Location field and in the Email Address File Location field.
Click Update All.

The entries will be imported into the database.

Note: Click **Flush All** button to remove existing domains and/or email addresses from the spam database.

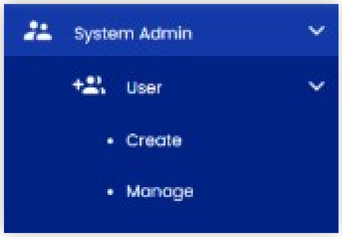
4. Click Close.

The database is updated.

11.2 User Admin

Admin Settings > System Admin > User

User admin allows you to create and manage users. In this module, you can assign users a role and access to cases. You may also associate a default screen layout with a user when creating or editing a user.



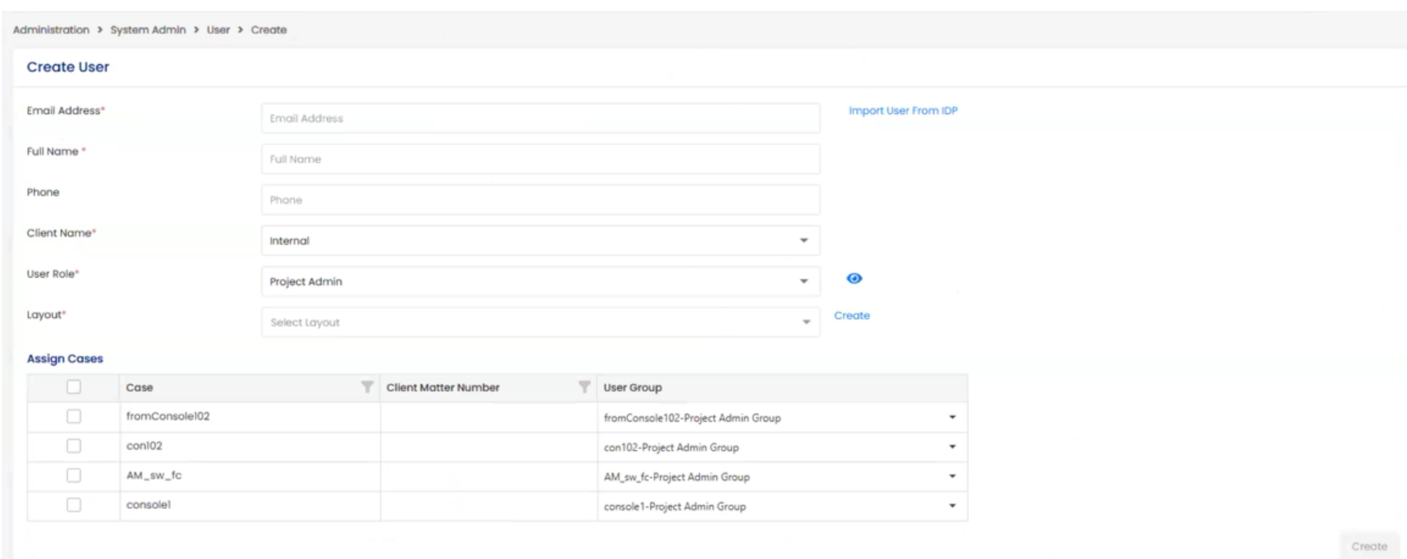
11.2.1 Create Users

Admin Settings > System Admin > User > Create

To create a user, follow the steps below:

Click drop-down arrow next to your name in the top right corner. Click Admin Settings > System Admin > User > Create.
OR
Admin Settings > System Admin > Create User button.

The Create User dialog is displayed.



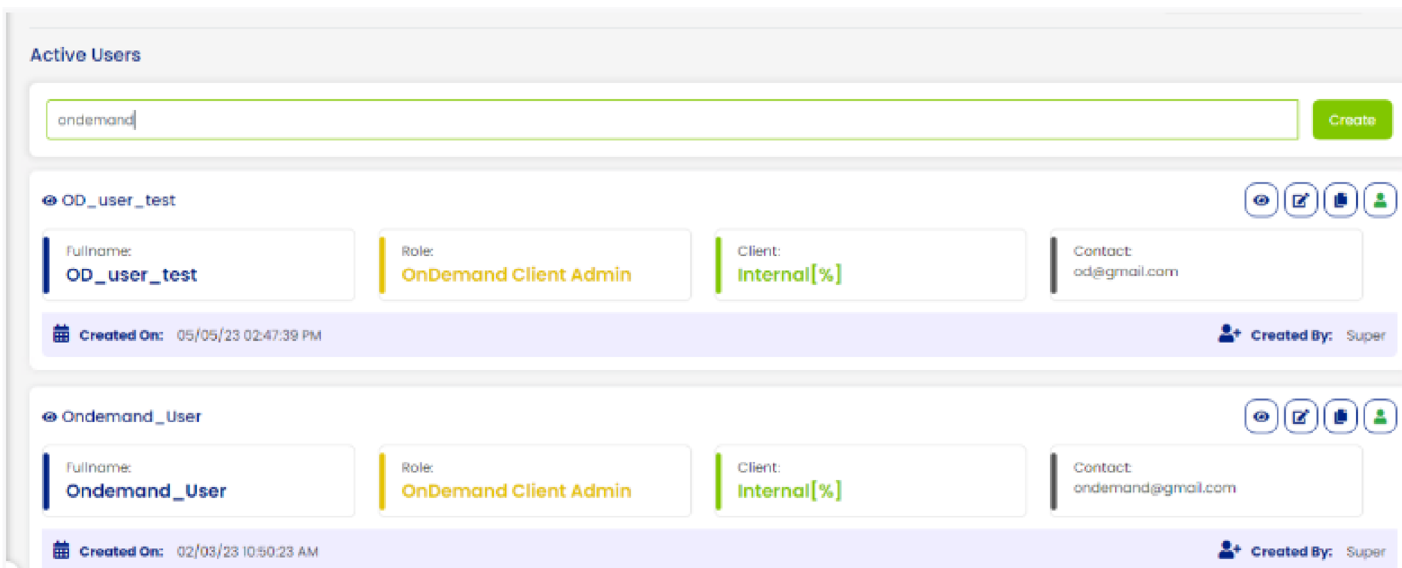
Enter the Email Address, Full Name, and Phone.
Select the client to associate with the user from the Client Name drop-down options.
Select the User Role using the drop-down list.

NOTE: Rights for the selected User Role can be viewed by clicking the View Rights button.

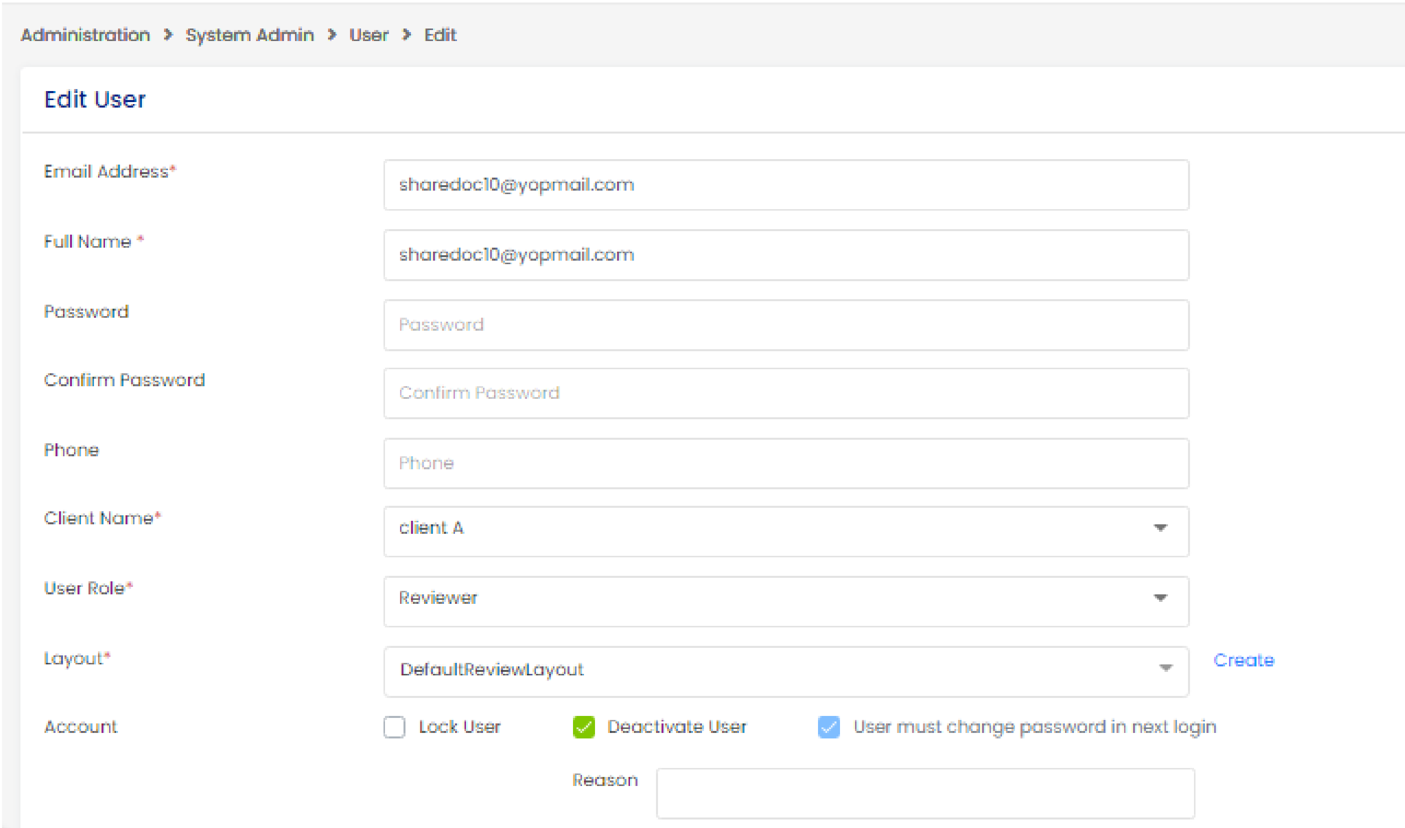
Select the screen Layout to be assigned to the user from the drop-down list. If needed, use the Create link to create a new Layout.
Check the Cases to be assigned to the user.
Click the Create button to create the user.
The user will have the capability to apply filters based on both name and role.

Additionally, the contact box now includes combined email and phone details.

A separate box has been introduced specifically for clients. The last icon shows whether the user is activated or not. If it is red, the user is deactivated, and green indicates activated. If red, you can activate the client by clicking on the icon and giving the confirmation.



On clicking the icon, you can deactivate the user providing a reason.



All the history of activating or deactivating a user is recorded in the Creation and Deactivation Report under login Report History menu.

When you reactivate (deactivated, then activated) any user, the user will receive an email with a link to reset the password. The user can reset the password and login to the system.

11.2.1.1 Import users from Active Directory

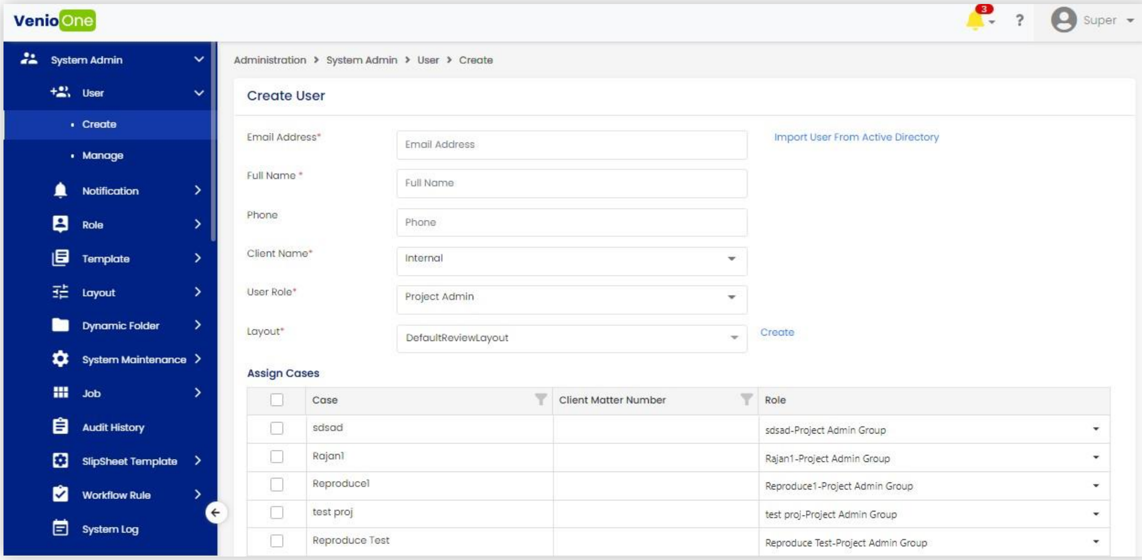
Import users from Active Directory option will be visible only if Active directory authentication is enabled and configured from Admin > Login Management > AD login setting

While creating a user, you can import users from an active directory from the Create User screen.

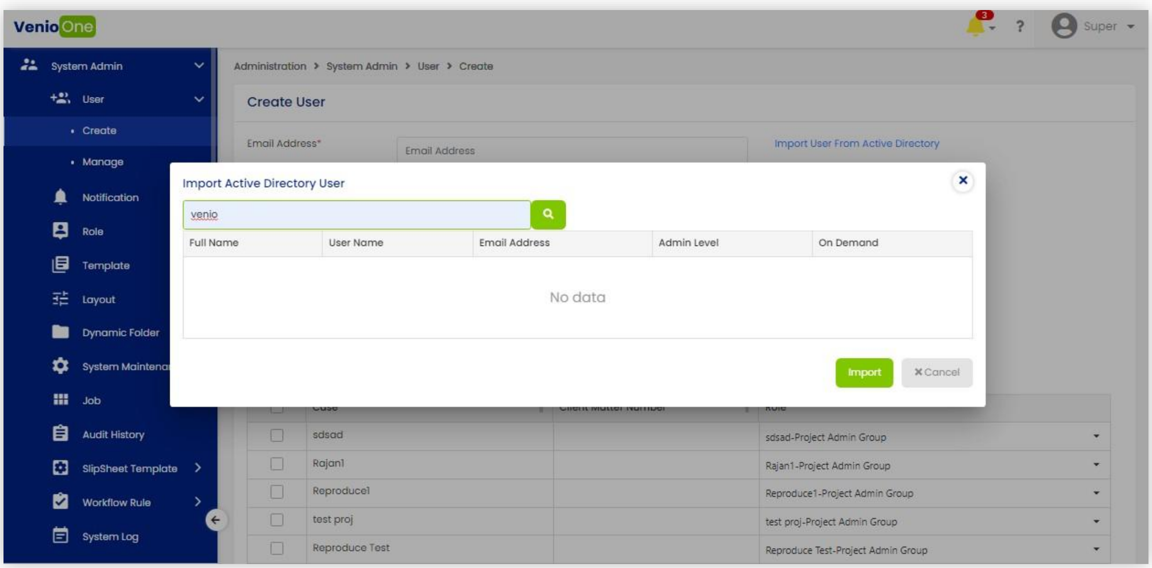
To import users from an active directory:

1. Navigate to Administration > System Admin > User > Create.

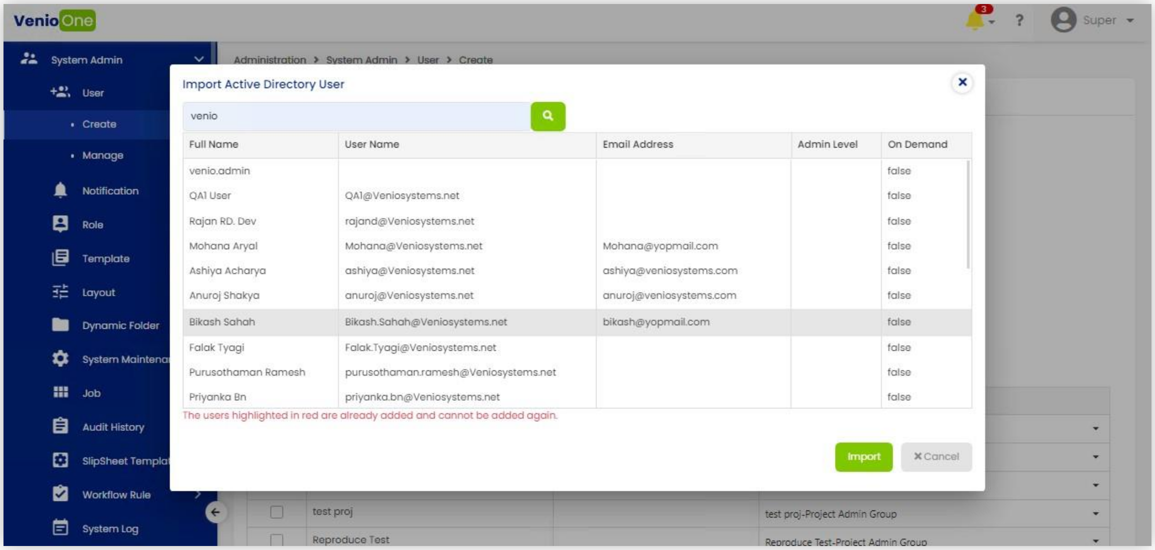
   The create user screen appears.



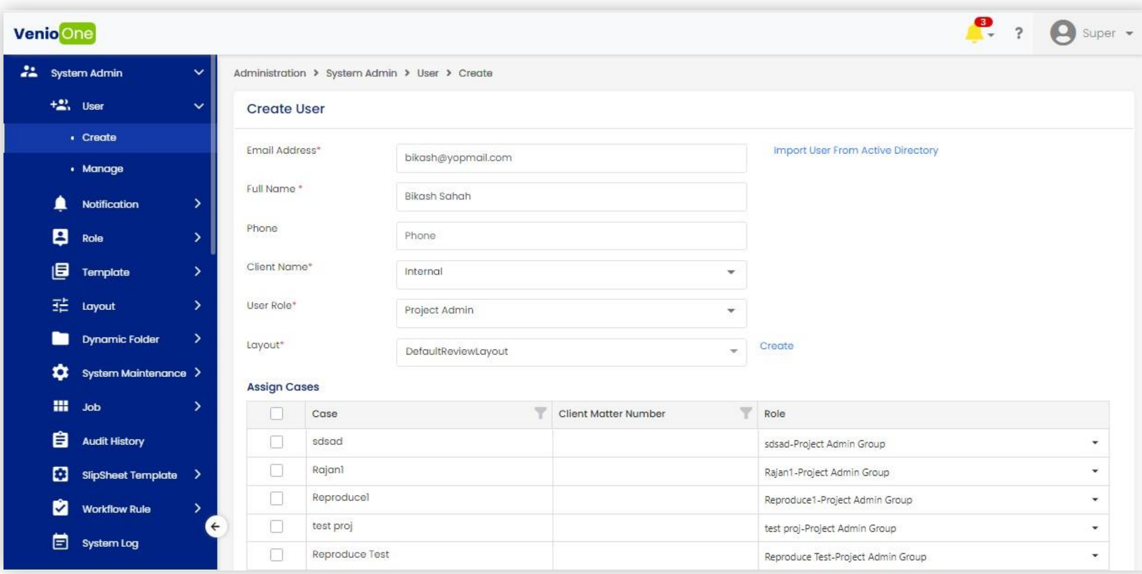
2. Click on Import Users From Active Directory. Search for a user from the import active directory user.



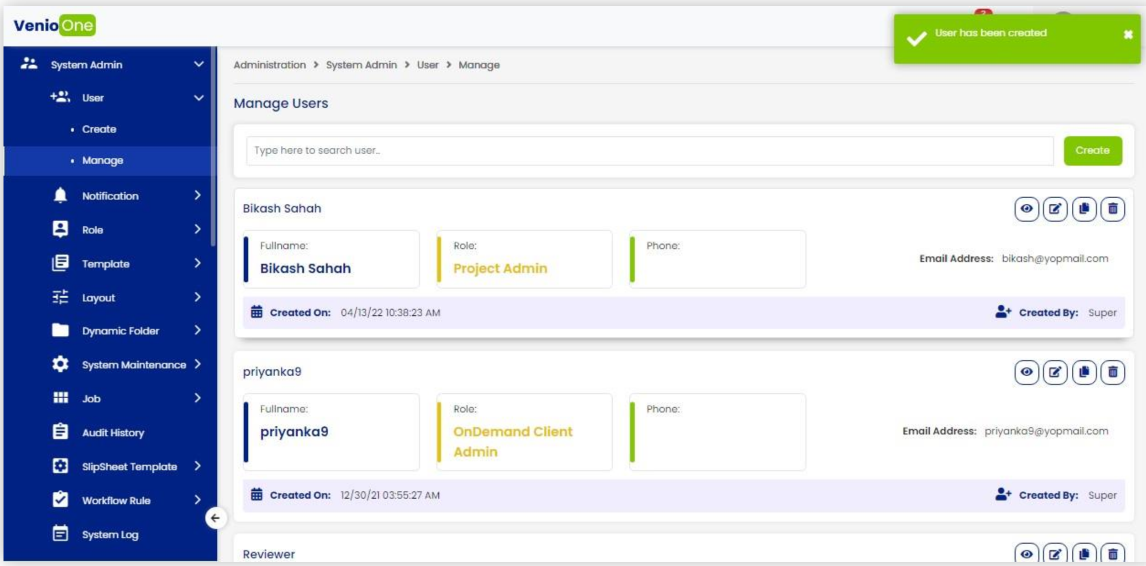
3. Select a user from the search results and click Import.



The user gets imported successfully.



4. Click Create. The user is successfully imported.



11.2.2 Manage Users

Admin Settings > System Admin > User > Manage

In the Manage Users module, cases may either be assigned to an existing user or new users can be created and assigned roles and cases, like creating users. You may also associate a default screen layout with a user when editing the user.

NOTE: Users can be assigned to only those cases which are associated with the client within the VenioOne Desktop Console.
Follow the steps below to manage users:

Click the drop-down arrow next to your name in the top right corner.

2. Click Admin Settings > System Admin > User > Manage

   OR

   Admin Settings > System Admin > Manage User button.

   The Manage User screen displays individual user cards. Use the buttons to View, Edit, Clone, or Delete a user, or create a new user using the Create button.

11.2.2.1 View User Information

Admin Settings > System Admin > User > Manage > View

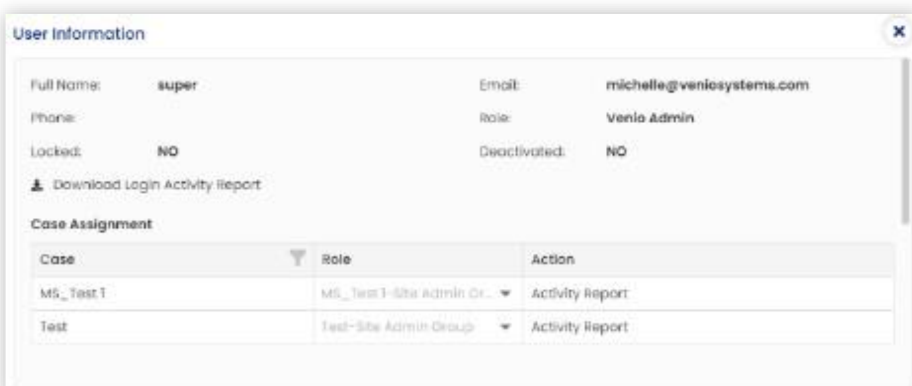
Follow the steps below to view the user information.

1. Click the drop-down arrow next to your name in the top right corner.
2. Click Admin Settings > System Admin > User > Manage
   OR
   Admin Settings > System Admin > Manage User button.

   The Manage User screen displays individual user cards (shown above).

3. Click the View button

   The User Information dialog is displayed.



User Activity Reports
Use the Download Login Activity Report link on the User Information dialog to view all user activity within VenioOne or use the Activity Report link next to a case name to view activity within a specific case.

11.2.2.2 Edit User Information

Admin Settings > System Admin > User > Manage > Edit

Follow the steps below to edit the user information:

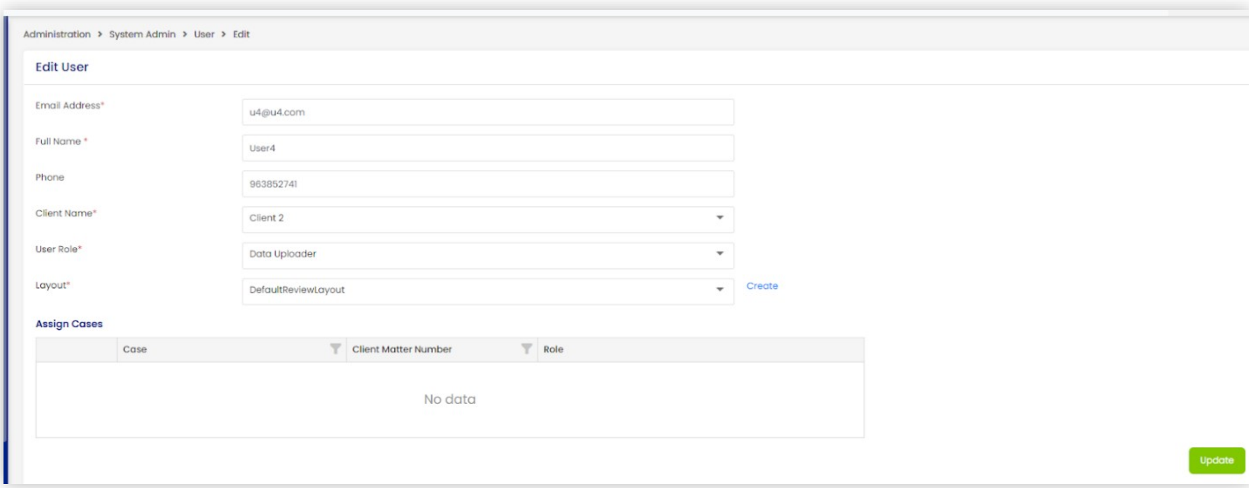
1. Click the drop-down arrow next to your name in the top right corner.
2. Click Admin Settings > System Admin > User > Manage
   OR
   Admin Settings > System Admin > Manage User button.

   The Manage User screen displays individual user cards.

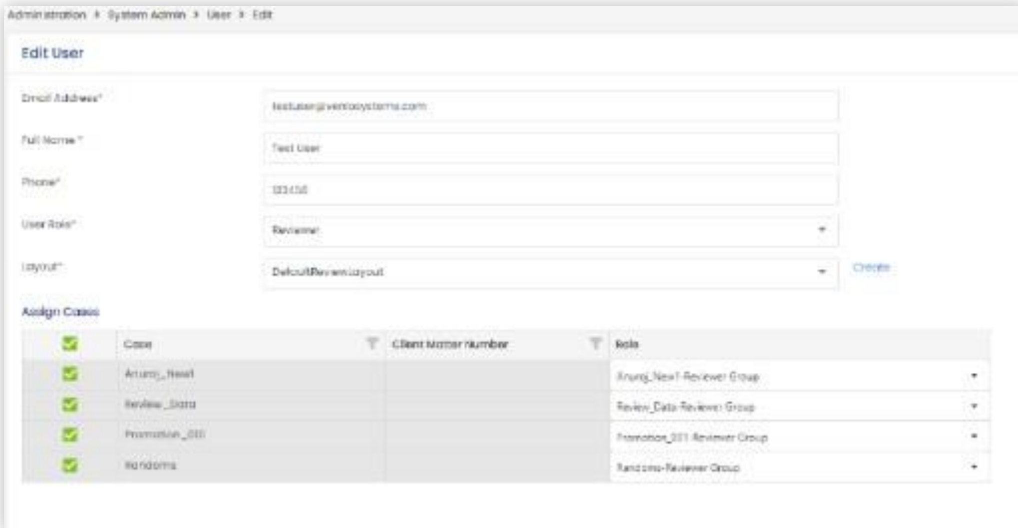
   Click the Edit button.

   The Edit User dialog displays. You'll be able to edit the email address, full name, phone, role, and assigned cases of the user.

3. Select the client to associate with the user from the Client Name drop-down options.



4. Edit the user settings and then click the Update button to save.



11.2.2.3 Clone Users

Admin Settings > System Admin > User > Manage Clone

You may clone a user to speed up creating new users with similar rights.

Click the drop-down arrow next to your name in the top right corner.
Click Admin Settings > System Admin > User > Manage OR
Admin Settings > System Admin > Manage User button.

The Manage User screen displays individual user cards.

Click the Clone button on the user card of the user you wish to clone

The Clone User dialog displays.

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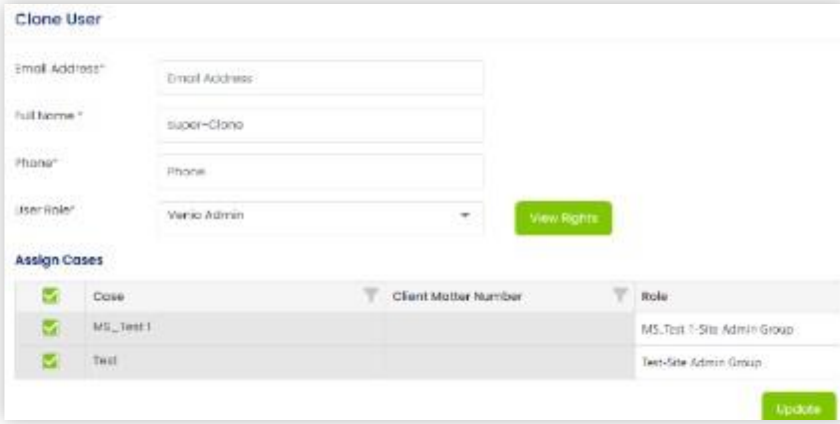
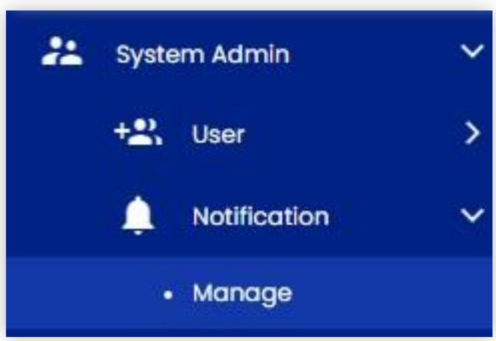


Enter the new user’s information.
Assign Cases to the new user.
Click the Update button to create the new user.

11.3 Notification Management

11.3.1 Notification Management Overview

Notification management allows you to manage notifications of various events that are sent through email. These settings can be navigated from Administration >> System Admin >> Notification >> Manage



Notification Management comprises of three parts:

- Enable/Disable Notification
- User
- Notification

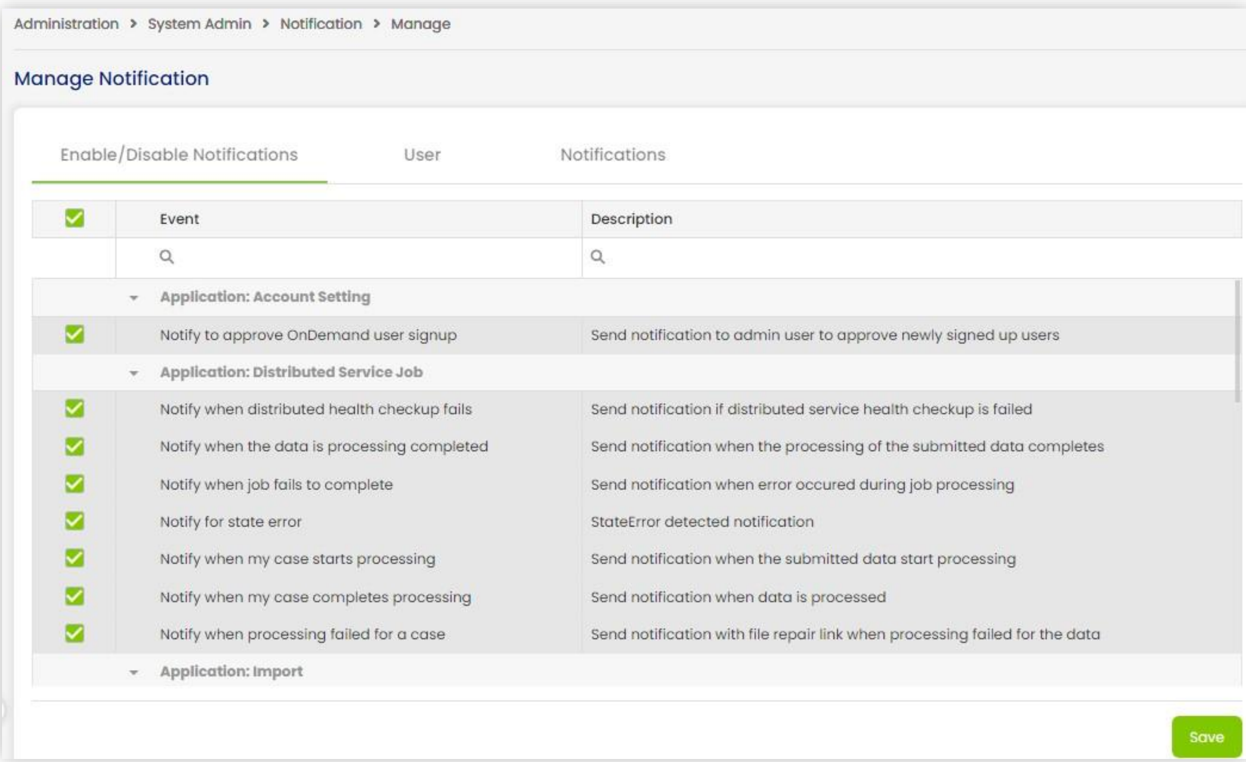
IMPORTANT: To send notifications, events must be checked on both the ‘Enable/Disable Notification’ and ‘User’ tabs. If events are checked on the ‘User’ tab, but not on the ‘Enable/Disable Notification’ tab, mail will not be queued and sent.

11.3.2 Enable/Disable Notification

Various events are displayed under the following headings:

- Application: Account Setting
- Application: Distributed Service Job
- Application: Import
- Application: Production
- Application: Project Status

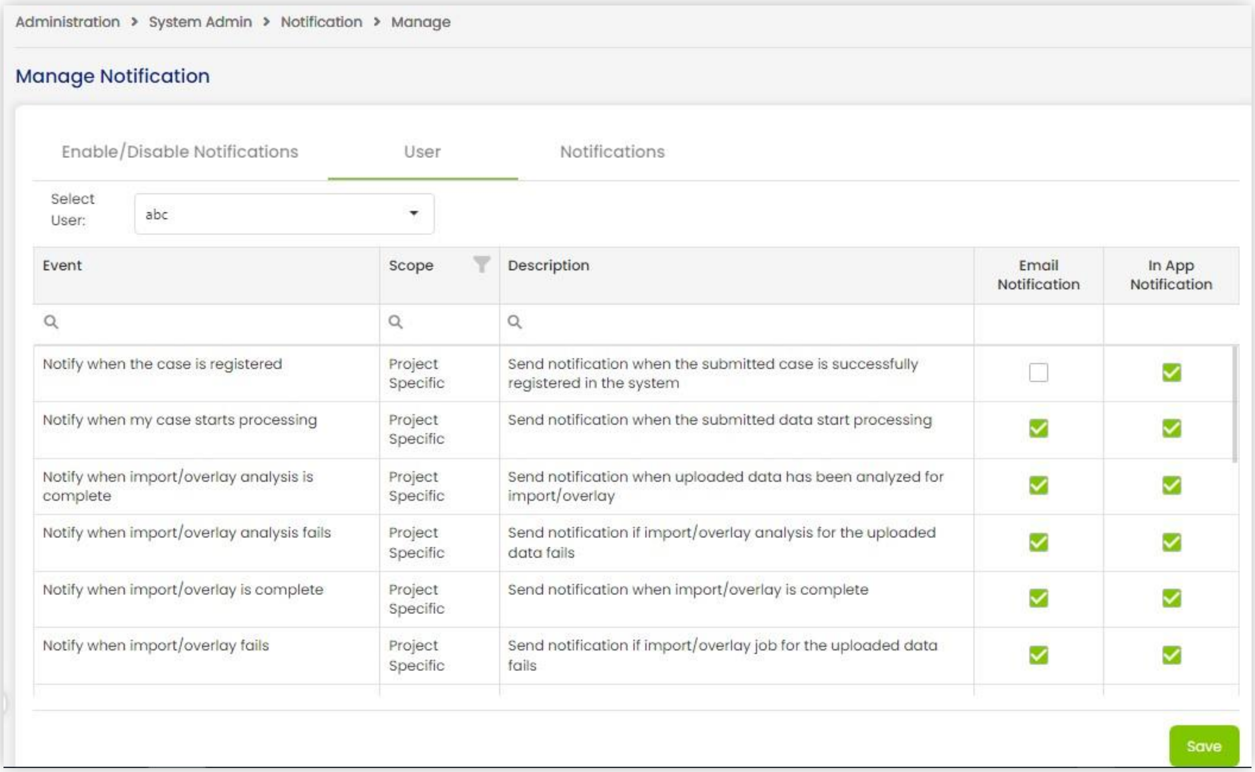
Under each heading, select the checkboxes for the corresponding events you wish to send mail for, and click Save.



11.3.3 Manage Notifications by User

You may enable notification emails for specific users for selected events. On the User tab, notifications are selected according to users for email notification.

1. Select the User tab.
2. Select/Assign the Events from the available grid.
3. Click Save.



11.3.4 Managing by Notification

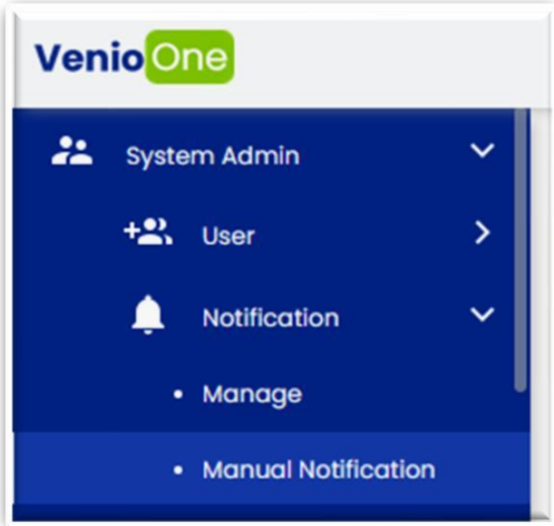
Various event notifications may be selected for required users. On the Notification tab, you may select specific events such as Notify when Distributed health check-up fails or Notify when a case is ready to review to view or change the user(s) associated with that event.

1. Select an Event from the drop-down list.
2. Select the User(s) from the available grid.
3. Click Save.

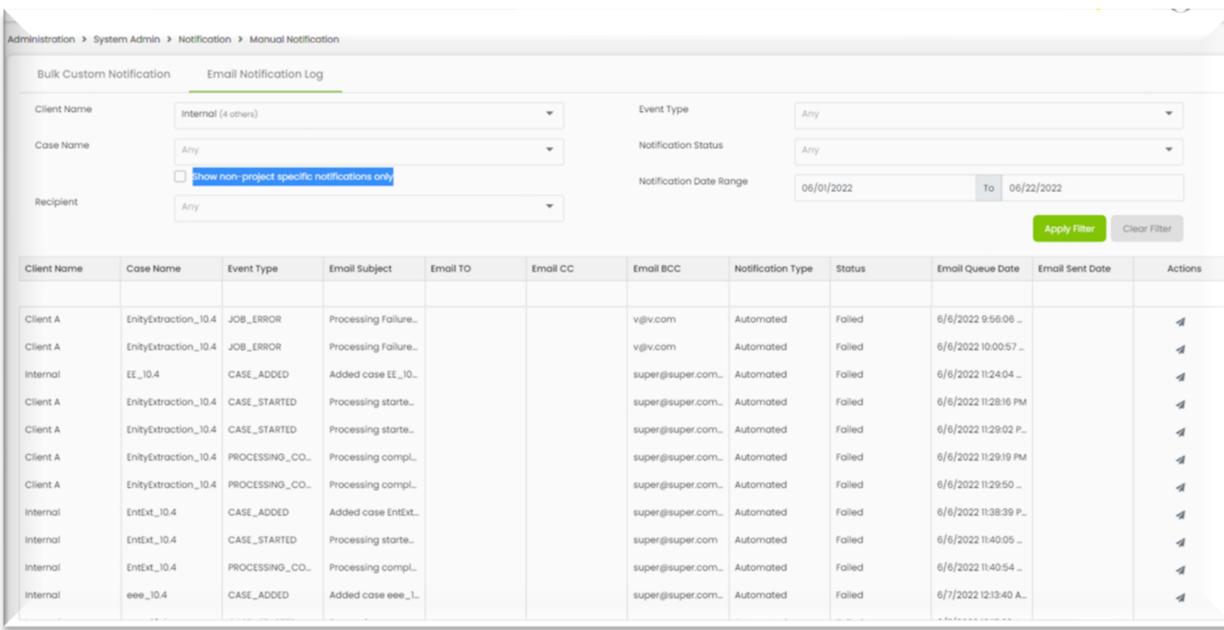
11.3.5 Manual Notification

Admin can manage the Manual notifications from this page.
To manage manual notifications:

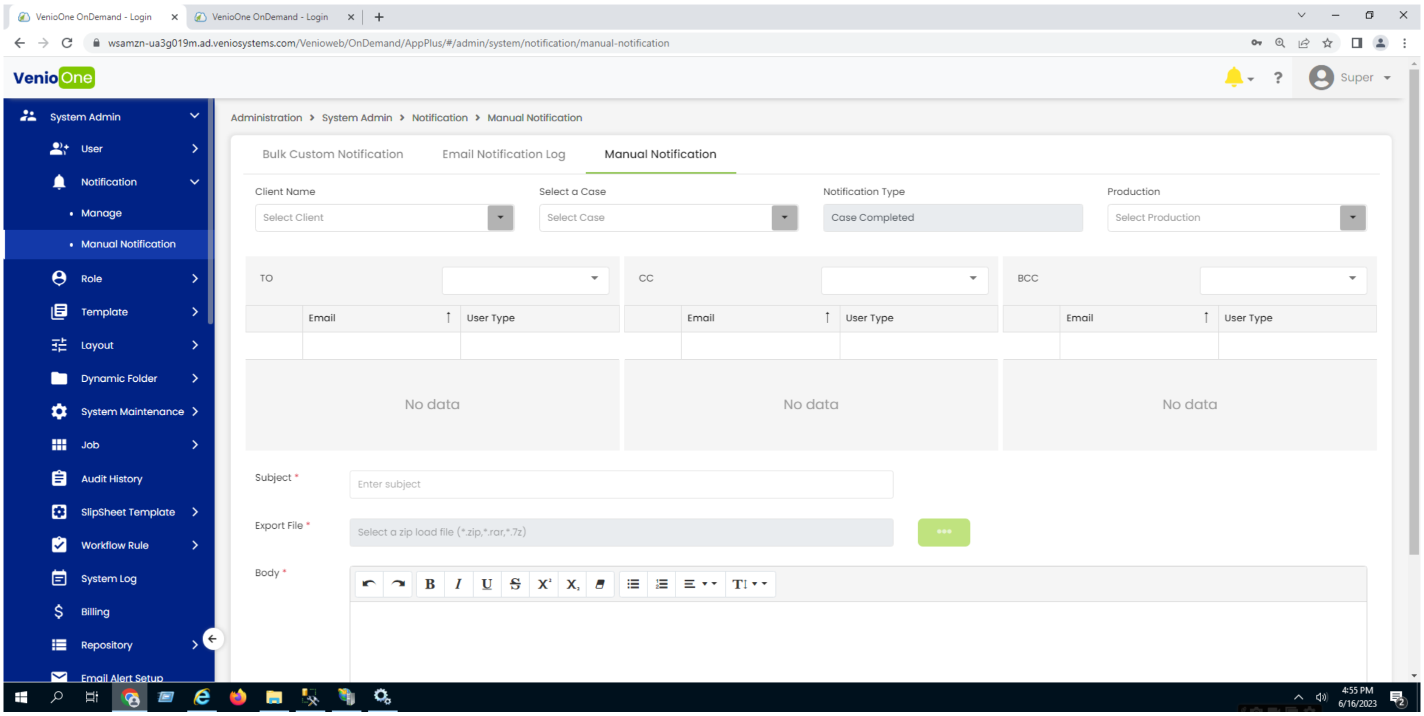
1. Login as Site admin and navigate to Administration >> System Admin >> Notification >> Manual Notification.



2. Click Manual Notification.



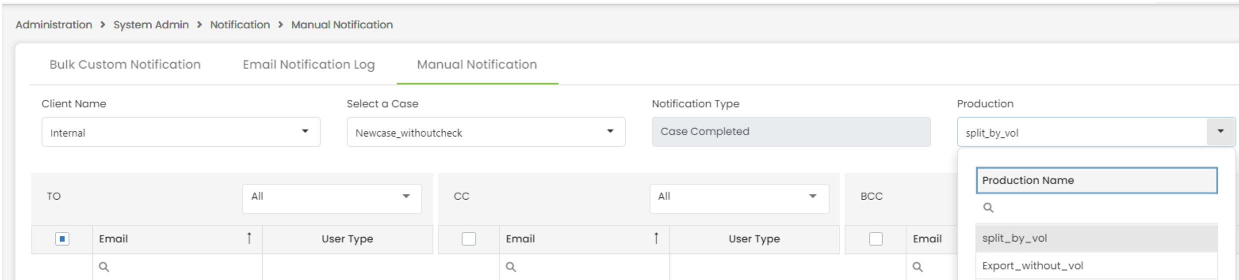
3. You can use the Add Filter button to populate desired result and resend notifications.



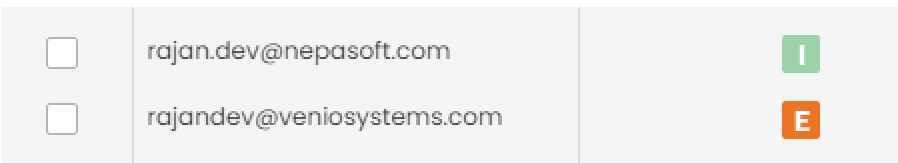
Choose a client to generate a list of cases specific to that client, and then select a case to retrieve all the associated productions within that case. The recipient can be either an internal client user or an external client user. An internal client user refers to a user who belongs to the internal client, whereas an external client user refers to a user who belongs to a client other than the internal client.
The notification tab is set to read-only.

For selecting the production, there is an option to split it by volume or use normal export. Once the production is chosen, the subject, export file, and body are automatically populated.

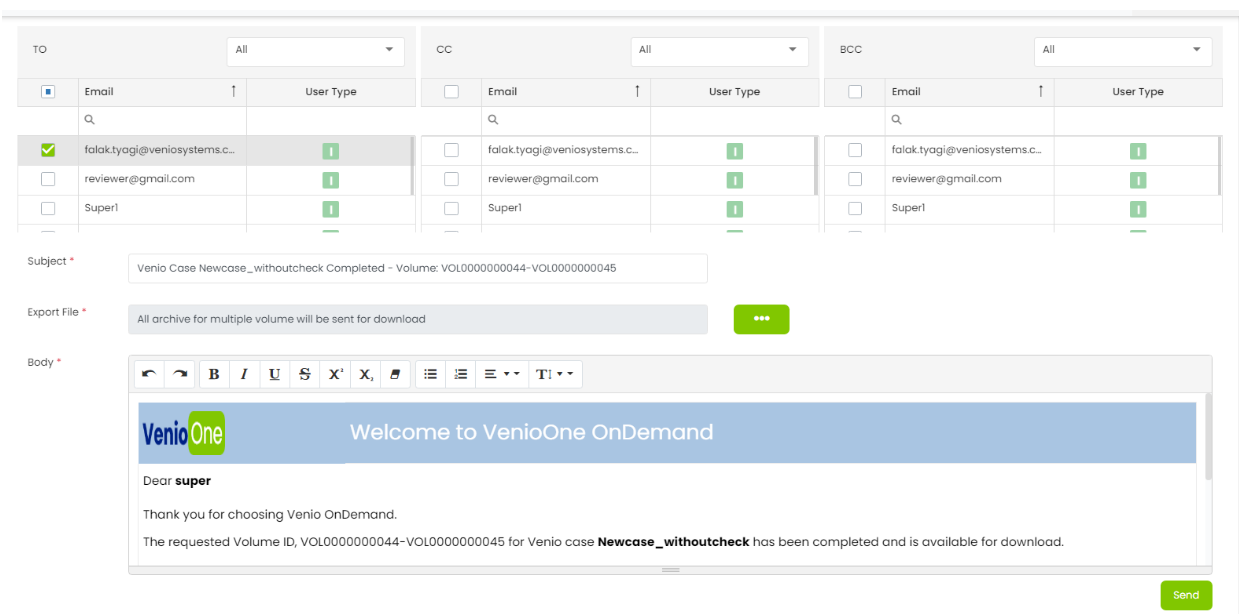
The recipients are divided into three categories: To, Cc, and Bcc, representing internal client users and external client users.



"I" stands for internal, and "E" stands for external.

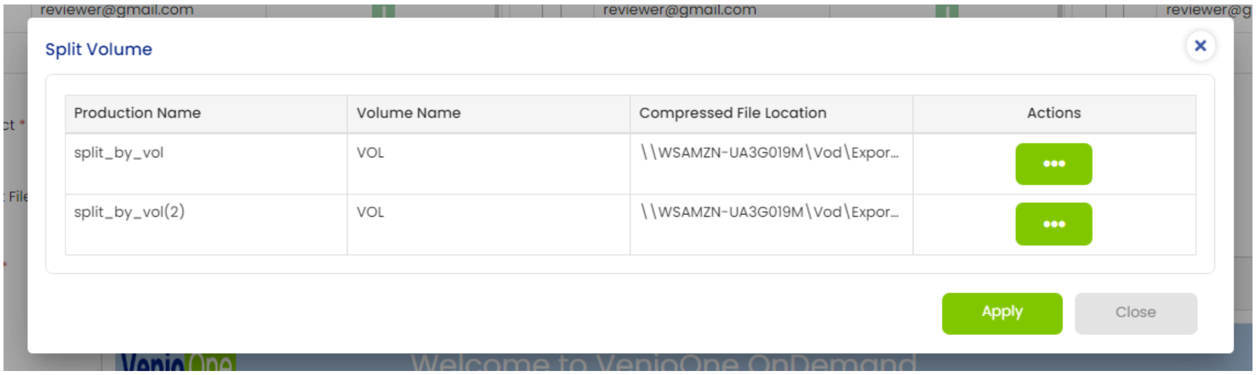


The user who created the case will be selected in the To list. All users who have uploaded media will be selected in the CC list. All Venio Admin associated with the internal clients will be selected in the BCC list.

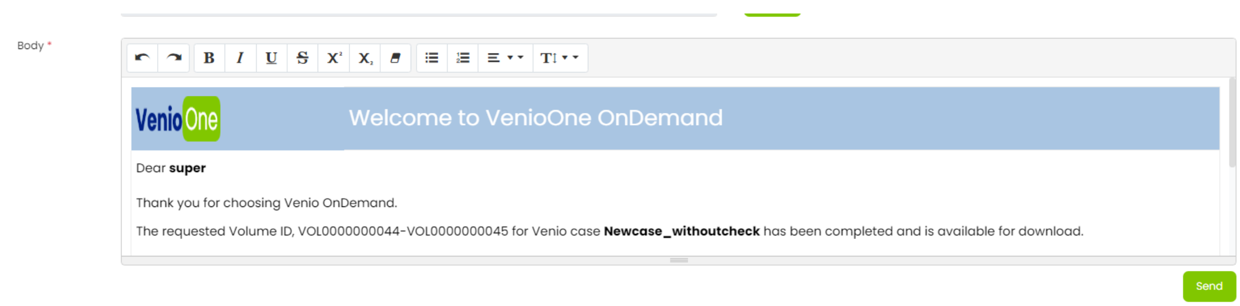


If the production is split by volume, the production name will be divided into volume names. Additionally, files can be added from the repository file browser.

Multiple files can be selected from the Repository browser to update the production file for the multiple volumes in Production with Split Volume on size whereas a single file is selected in Production without Volume Options.



The body of the message can be edited according to the user's needs or the type of message that needs to be sent. Once the email is sent, the recipient can extract the downloaded data.



11.4 Role Admin

The Role module allows you to create and manage the roles of users. In this module, you can assign users a role and relevant/concerned cases.

The User Roles available are:

- Venio Admin
- Non-Admin
- OnDemand Client Admin
- OnDemand Client External User
- Project Admin has all permissions, except viewing shared documents and usage report.
- Project Admin has all permissions, except viewing shared documents and usage report.
- Reviewer has permission to review and analyze.
- Data Uploader has permission to upload data only.
- User has permission to review and analyze.

NOTE: User and Reviewer have the same permissions initially, but they may be changed as needed.

11.4.1 Create Role

Admin Settings > System Admin > Role > Create

To create a role, follow the steps below:

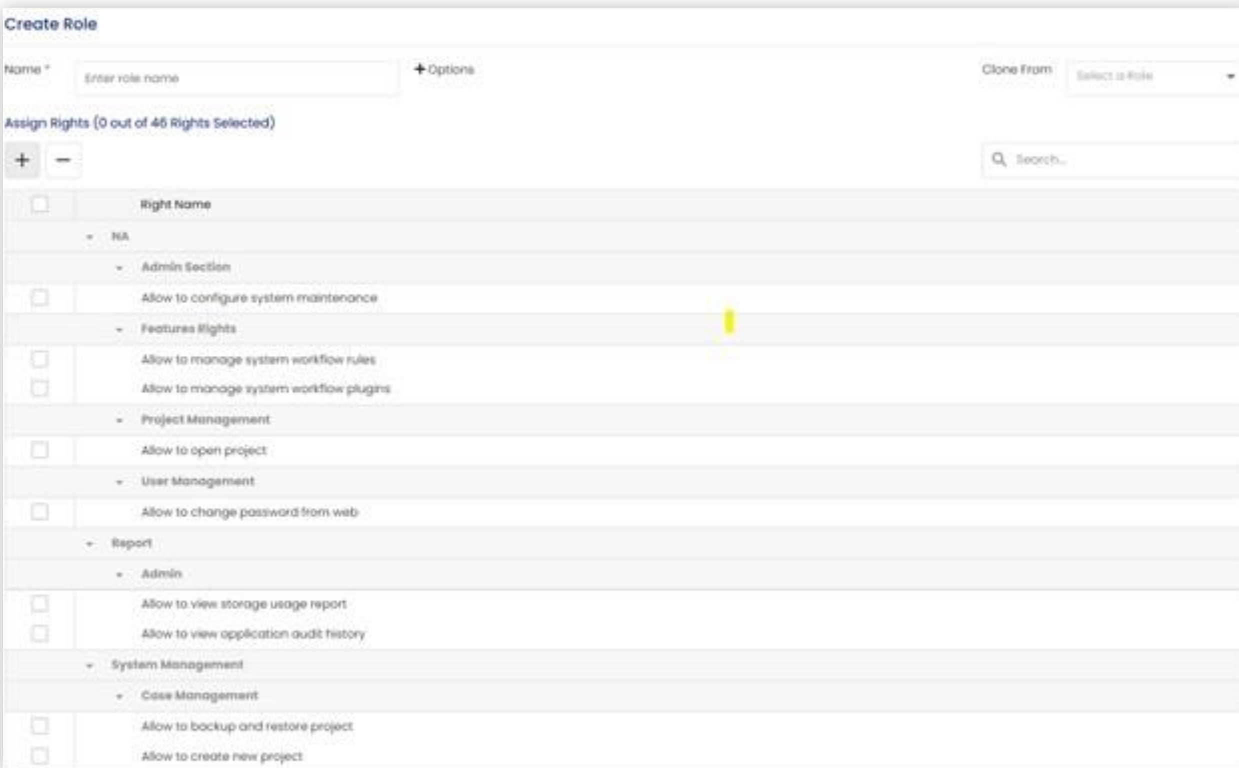
1. Click drop-down arrow next to your name in the top right corner.
2. Click Admin Settings > System Admin > Role > Create
   OR
   Admin Settings > Systems Admin > Create Role button.

   The Create Role dialog is displayed

3. Enter the user role Name.
4. From the Search rights in the search bar, select the corresponding checkbox in the dropdown lists to Assign Rights for the role.

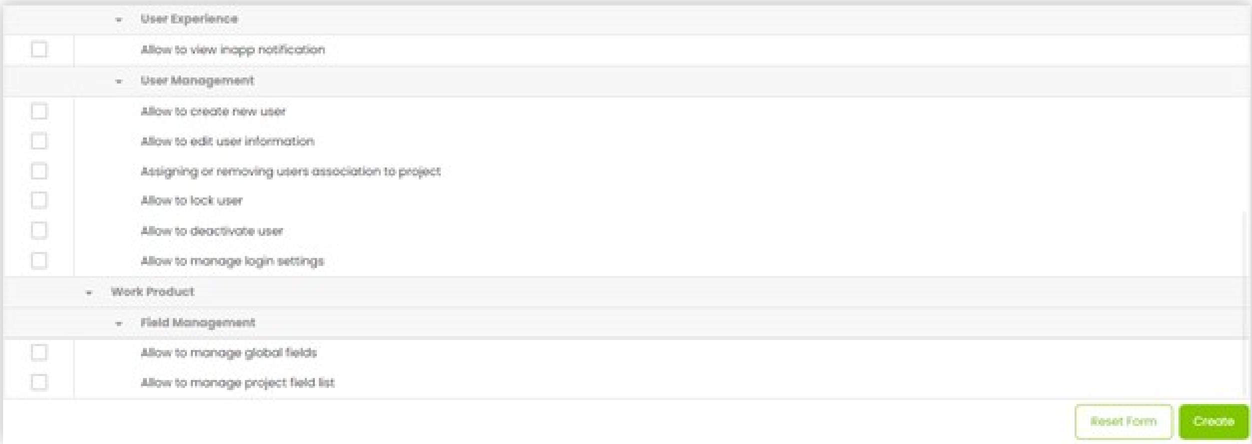
5. Click the Create button to create the role with the assigned rights.

11.4.1.1 List of Role Categories and Rights



	Right Name
	Client Management
	Allow to create new client
	Allow to edit client
	Job Management
	Allow to assign dedicated servers
	Allow to view job priority
	Allow to change job priority
	License Management
	Allow to generate license file
	View license status
	Allow to renew license
	Allow to configure distributed server license management
	Role Management
	Allow to change the role and rights of a user
	Allow to view role right of users
	Allow to manage group role right
	Allow to manage venio admin level right

	Right Name
	Server Configuration
	Allow to add/edit the database server configuration
	Allow to add/edit the email alert configuration
	Allow to attach/detach NSRL database
	Allow to add/edit the search server configuration
	Allow to add/edit the shared file configuration
	Allow to update the SPAM Database
	Allow to configure ocr service manager configuration
	Allow to manage distributed service
	System Administration
	Allow to access administrative mode
	Template Management
	Allow to create/edit import template
	Allow to create and edit Project Template
	Allow to create and edit Export Template
	Allow to create and edit review set template
	Allow to create edit export field template
	Use Applets
	Allow to view administrative applets



11.4.2 Assign Permissions to Global Groups

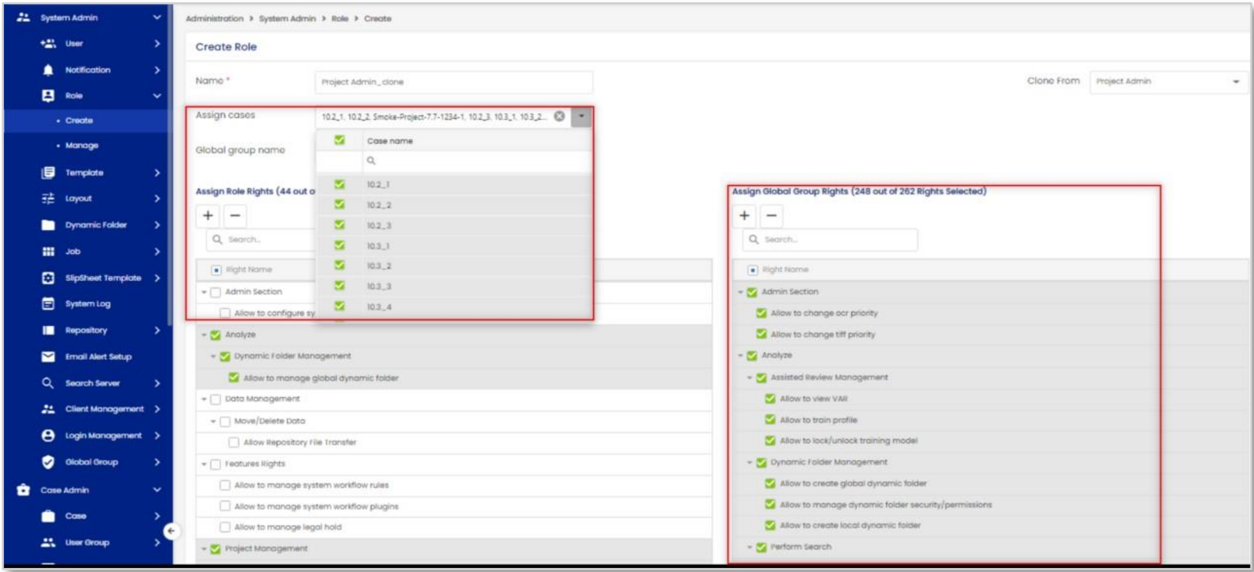
Once a role is created, you can assign the rights for the global group to be created.

You can create the user group in the selected projects and assign global group rights in the projects for the user group.

When you create the user with that role and assign project to that group, user can access features/modules in the project which are controlled by global group permissions.

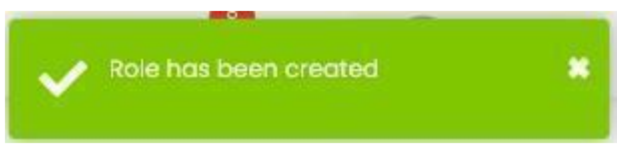
To assign permission to global group and project group, follow the below steps:

1. Click the drop-down arrow next to your name in the top right corner.
2. Click Admin Settings > System Admin > Role > Create Role.



3. Select the role name from the Name drop down list.
4. To assign cases to the role, select the checkboxes for the cases to choose from the Assign Cases.
5. If you want to assign any user with RSMF file permission, select Allow to Generate RSMF file group checkbox.
6. From the Assigned Global Group Rights, select the rights for the cases selected.
7. Click Create.

A message confirming the role creation appears.



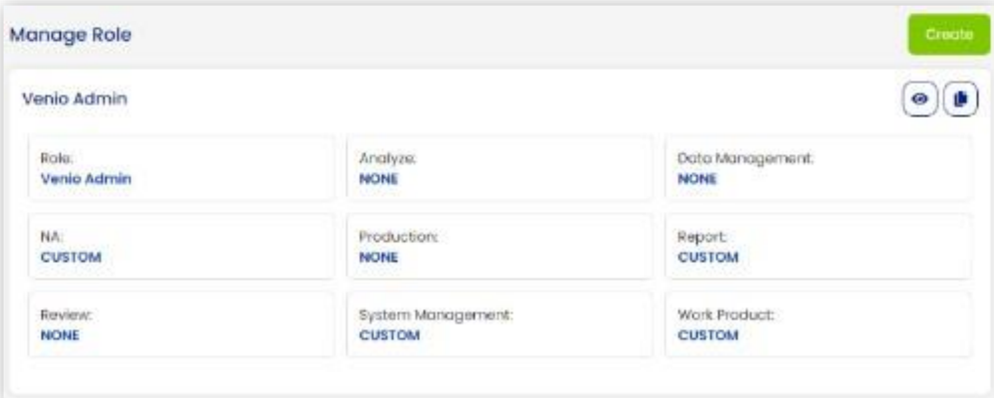
11.4.3 Manage Roles

Admin Settings > System Admin > Role > Manage

To view and modify user roles, follow the steps below:

1. Click the drop-down arrow next to your name in the top right corner.
2. Click Admin Settings > System Admin > Role
   OR
   Admin Settings > System Admin > Role > click Manage Roles button.

The Manage Role cards are displayed with options to View or Clone a role. The Manage Role cards also give a summary of each Role's rights. For more detailed information, click the View button.



11.4.3.1 View Role

Admin Settings > System Admin > Role > Manage > View

To view or download details for user roles, follow the steps below:

1. Click the drop-down arrow next to your name in the top right corner.
2. Click Admin Settings > System Admin > Role > Manage
   OR
   Admin Settings > System Admin > Role > click the Manage Role button.

   The Manage Role screen is displayed containing role cards with options to View or Clone a role.

3. Click the View button.

   The Role Overview dialog displays details of the rights assigned.

   NOTE: You may use the Download Role Rights link to download a list of the rights assigned to the role.

11.4.3.2 Clone Role

Admin Settings > System Admin > Role > Manage > Clone

Rather than create a role from scratch, it may be helpful to Clone an existing role with similar rights.

To clone a user role, follow the steps below:

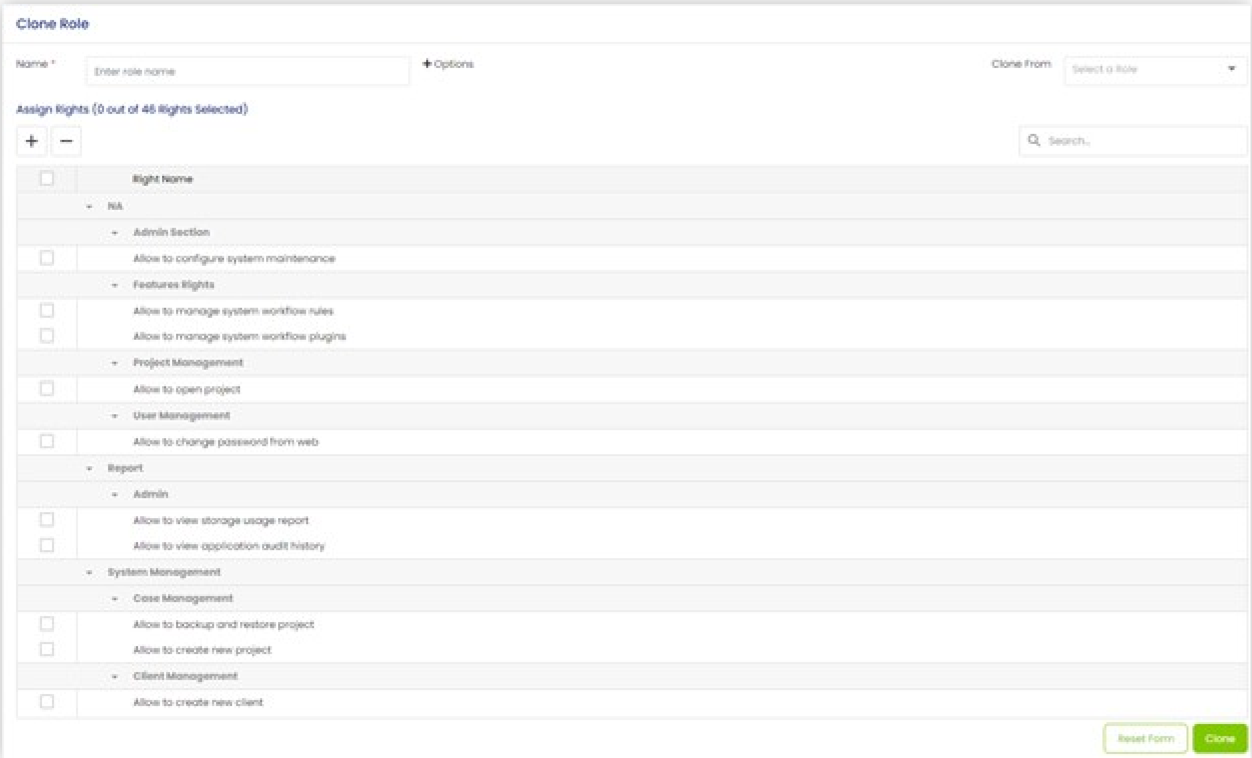
1. Click the drop-down arrow next to your name in the top right corner.
2. Click Admin Settings > System Admin > Role > Manage
   OR
   Admin Settings > System Admin > click the Manage Roles button.

   The Manage Role cards are displayed with options to View or Clone a role.

3. Click the Clone button.

   The Clone Role dialog displays details of the rights assigned.

4. If needed, click the Options link to expand and modify the list of cases available for the role.
5. Adjust the rights as needed using the drop-down lists.
6. Scroll to the bottom of the list of rights and click the Clone button to complete the cloning process.

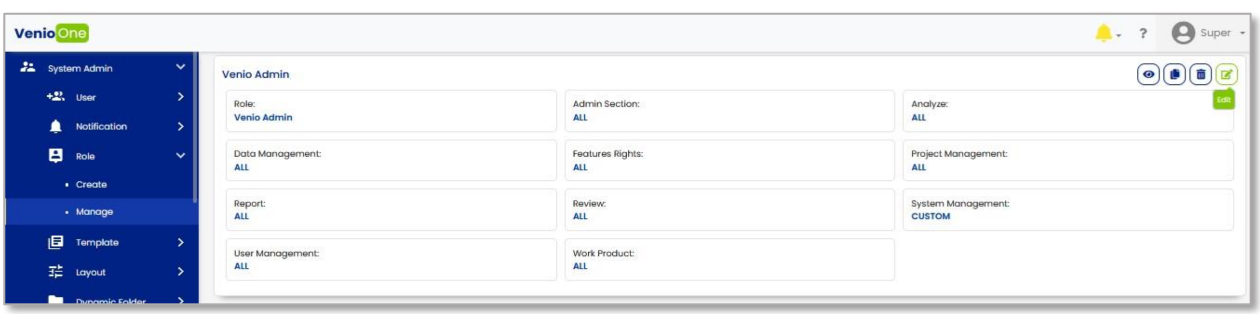


11.4.3.3 Edit roles

You can edit to the roles using the Update role.

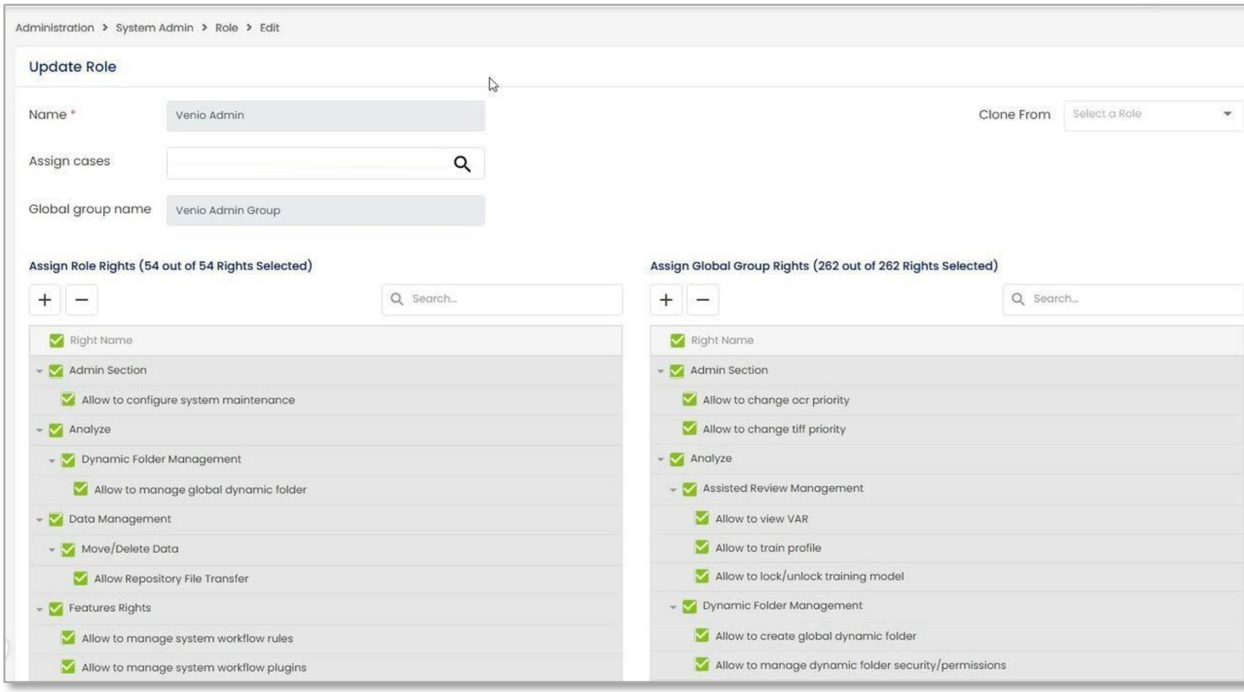
To update a user role and assign cases, follow the steps below:

1. Click the drop-down arrow next to your name in the top right corner.
2. Click Admin Settings > System Admin > Role > Manage. Select the role you want to edit.
3. Click on the Edit icon.

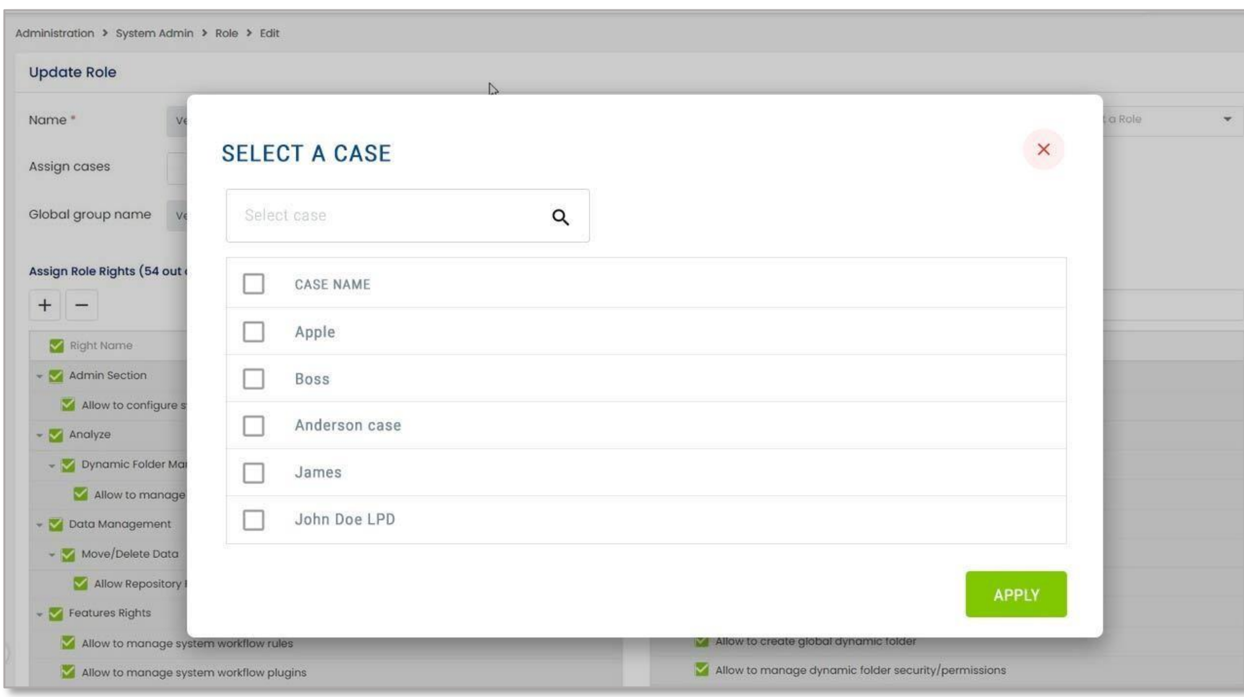


The Update Role screen is displayed with options to Assign Role Rights or Assign Global Group Rights to a role.

Venio

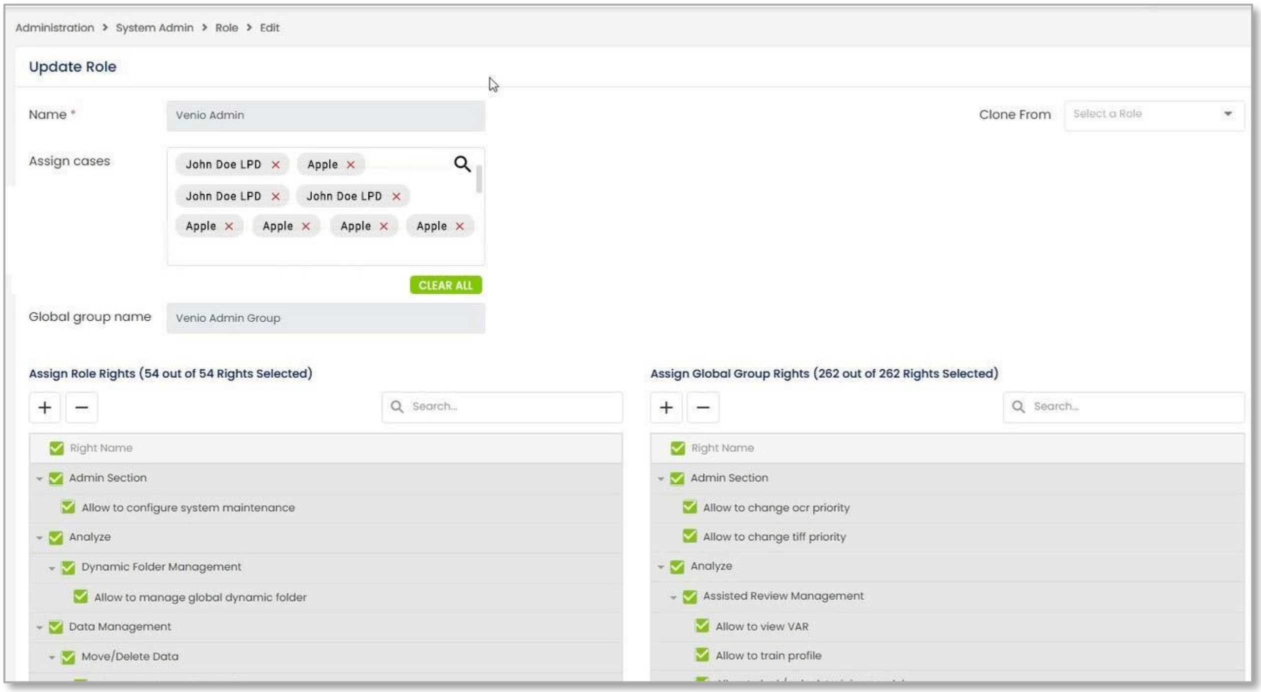


4. Enter a name in the Name Field.
5. In the Assign Cases field, select the cases you wish to assign using the Select a Case:



6. Select a case by selecting the corresponding checkbox. You can select one or more cases from the available options and click Apply. You can click "X" to close the page.

7. The selected cases appear in the Assign Cases field with option to be removed as shown:

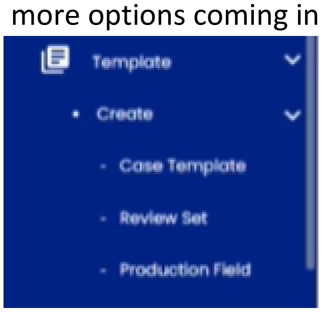


After the cases are selected and added, but if you wish to remove any of them, click on the "X" corresponding to the case. The case is removed from the Assign Cases field. You may also click on CLEAR ALL to discard or delete all the selected cases from the Assign Cases field.

11.5 Template Admin

VenioOne uses a variety of templates to make work quicker and repeatable processes consistent no matter who is doing them. Template settings are what enable VenioOne OnDemand to keep the interface simplified for the end user while still providing robust functionality on the back end.

Currently, Production Field and Review Set templates may be created and managed in VOD with more options coming in the future. Other templates are managed via the Desktop Console.



Venio

11.5.1 Production Field Templates

Admin Settings > System Admin > Template > Create > Production Field

Production Field Templates are used to designate which fields are included when doing production out of VenioOne. The end user will pick the template at the time of production to control what is included in the production.

The creation of a template is a two-step process. You first select the fields to be included and rename the fields., if needed The second step is arranging the order of the fields.

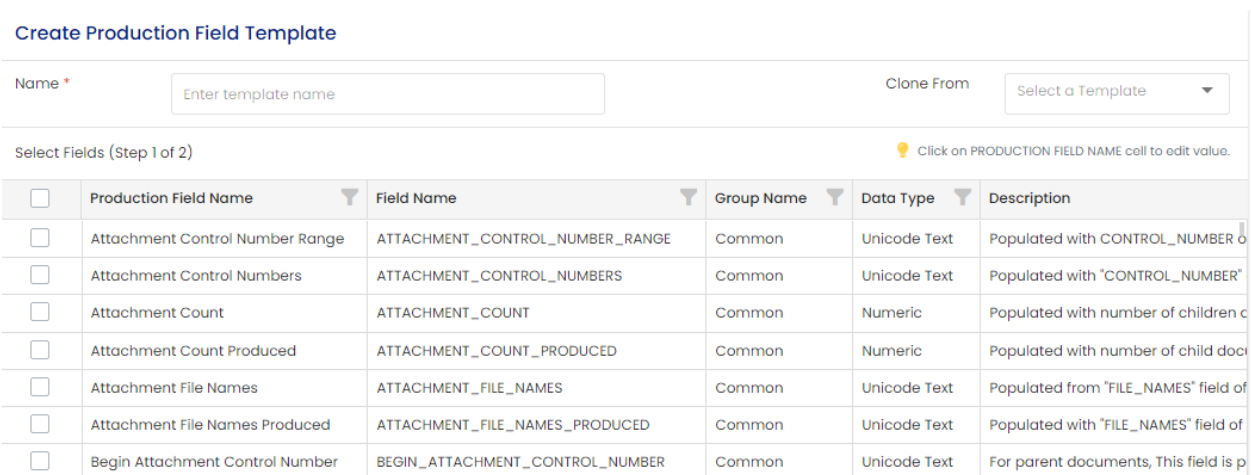
11.5.1.1 Create Production Field Template

To create a Production Field Template, follow the steps below:

1. Click the drop-down arrow next to your name in the top right corner.
2. Click Admin Settings > System Admin > Template > Create > Production Field
   OR
   Click Admin Settings > System Admin > click the Create Template button.

   The Create Production Field Template dialog is displayed.

3. Enter the Name for the template.
4. Use the check boxes to select the fields to be included.
5. OPTIONAL: Click the Production Field Name to edit the name of the field(s)


Create Production Field Template

Name * Enter template name

Clone From Select a Template

Select Fields (Step 1 of 2)

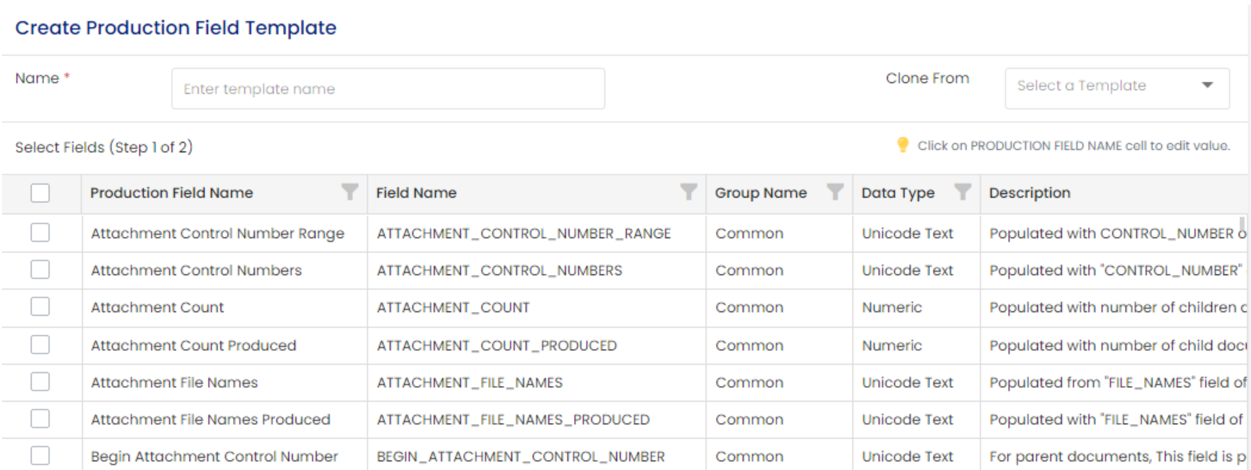
Click on PRODUCTION FIELD NAME cell to edit value.

	Production Field Name	Field Name	Group Name	Data Type	Description
☐	Attachment Control Number Range	ATTACHMENT_CONTROL_NUMBER_RANGE	Common	Unicode Text	Populated with CONTROL_NUMBER o
☐	Attachment Control Numbers	ATTACHMENT_CONTROL_NUMBERS	Common	Unicode Text	Populated with "CONTROL_NUMBER"
☐	Attachment Count	ATTACHMENT_COUNT	Common	Numeric	Populated with number of children c
☐	Attachment Count Produced	ATTACHMENT_COUNT_PRODUCED	Common	Numeric	Populated with number of child doc
☐	Attachment File Names	ATTACHMENT_FILE_NAMES	Common	Unicode Text	Populated from "FILE_NAMES" field of
☐	Attachment File Names Produced	ATTACHMENT_FILE_NAMES_PRODUCED	Common	Unicode Text	Populated with "FILE_NAMES" field of
☐	Begin Attachment Control Number	BEGIN_ATTACHMENT_CONTROL_NUMBER	Common	Unicode Text	For parent documents, This field is p

Scroll to the bottom of the list, and click the Next button.

Step 2 of the Create Production Field Template dialog is displayed.

6. Click-and-drag using the button at the beginning of each row to arrange the fields into the order for production.


Create Production Field Template

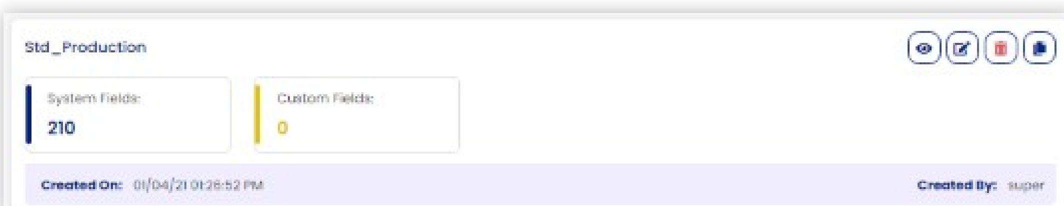
Name * Enter template name | Clone From Select a Template

Select Fields (Step 1 of 2) | Click on PRODUCTION FIELD NAME cell to edit value.

Production Field Name	Field Name	Group Name	Data Type	Description
Attachment Control Number Range	ATTACHMENT_CONTROL_NUMBER_RANGE	Common	Unicode Text	Populated with CONTROL_NUMBER o
Attachment Control Numbers	ATTACHMENT_CONTROL_NUMBERS	Common	Unicode Text	Populated with "CONTROL_NUMBER"
Attachment Count	ATTACHMENT_COUNT	Common	Numeric	Populated with number of children c
Attachment Count Produced	ATTACHMENT_COUNT_PRODUCED	Common	Numeric	Populated with number of child doc
Attachment File Names	ATTACHMENT_FILE_NAMES	Common	Unicode Text	Populated from "FILE_NAMES" field of
Attachment File Names Produced	ATTACHMENT_FILE_NAMES_PRODUCED	Common	Unicode Text	Populated with "FILE_NAMES" field of
Begin Attachment Control Number	BEGIN_ATTACHMENT_CONTROL_NUMBER	Common	Unicode Text	For parent documents, This field is p

7. Scroll to the bottom of the dialog and click the Create button to create the template.

The template is created, and you are taken to the Manage Production Field Template dialog, which displays a card for each template and options to work with the template.



11.5.2 Manage Production Field Templates

Admin Settings > System Admin > Template > Manage > Production Field

To manage Production Field templates, follow the steps below:

1. Click the drop-down arrow next to your name in the top right corner.
2. Click Admin Settings > System Admin > Template > Manage > Production Field
   OR
   Click Admin Settings > System Admin > click the Manage Template button.

   The Manage Production Field Template dialog is displayed, which displays a card for each template and options to work with the template.

3. Use the buttons to View, Edit, Delete, or Clone the template.

11.5.3 Create Review Set Template

Admin Settings > System Admin > Template > Create > Review Set

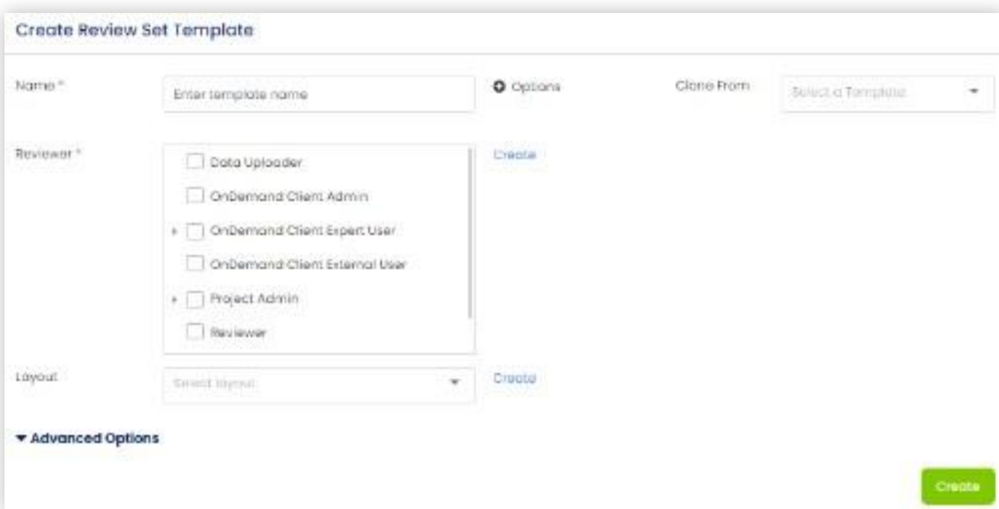
To create a Review Set Template, follow the steps below:

1. Click the drop-down arrow ▼ next to your name in the top right corner.
2. Click Admin Settings > System Admin > Template > Create > Review Set

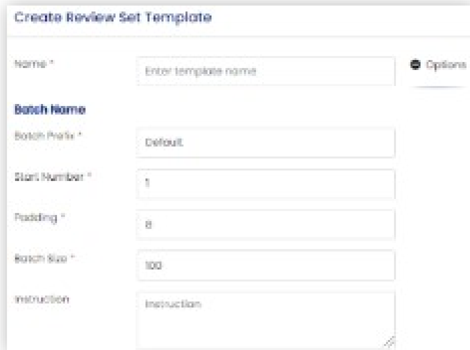
   The Create Production Field Template dialog is displayed.

3. OPTIONAL: Select a template from the Clone From drop-down list to clone an existing template and adjust the options as needed.
4. Enter the Name for the template.
5. Use the check boxes to select the Reviewer group(s) to be included.
6. Use the Layout drop-down list to select a Review Dashboard layout for the Review Set.

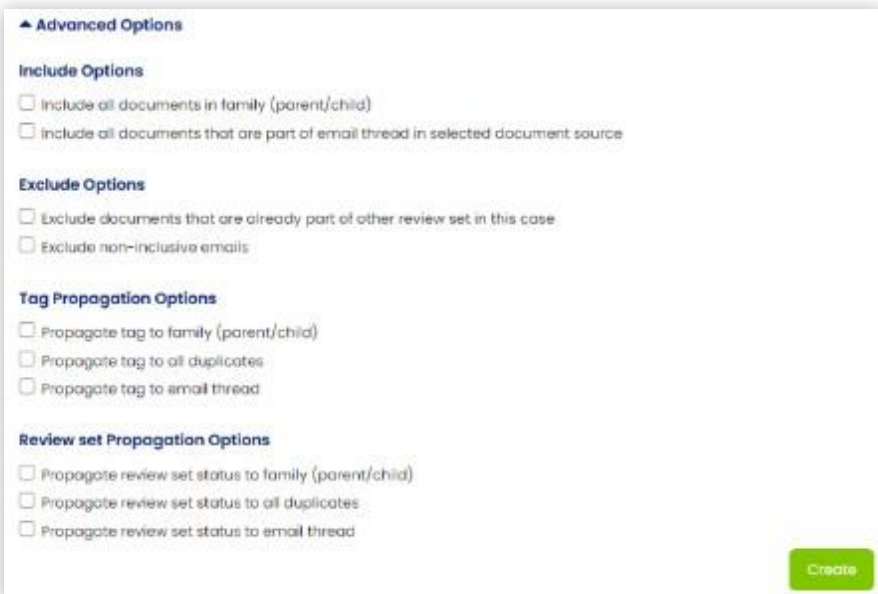
NOTE: The Create links adjacent to the Reviewer and Layout fields may be used to add new Reviewer Groups and Layouts.



Click the Options link adjacent to the Name field to display additional Batch Name options.



OPTIONAL: Click the Advanced Options link to display the following options. Use the check boxes to select the options needed.



Click the Create button to create the Review Set Template.

The Review Set Template is created and will be available when creating new review sets within the Case Admin module.

11.5.4 Manage Review Set

Admin Settings > System Admin > Template > Manage > Review Set

11.5.4.1 Purge Option

Using this option, you can delete a review set while it is already in progress. You can select multiple batches and purge the batches which are in progress, after which it re-commits the reviewed document on those batches to create a new batch for unreviewed document. With this, you delete the review set and allow to reassign the remaining unreviewed document(s) to other reviewers.

Note: The Purge feature is applicable only to the items which are in progress state.

To Purge, follow the steps below:

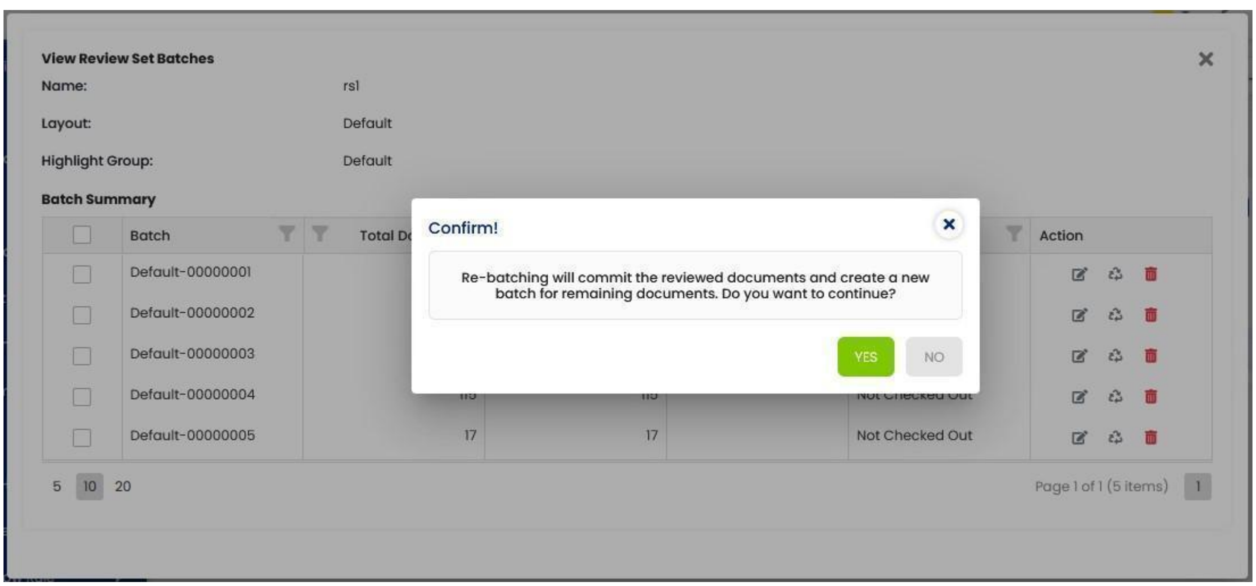
1. Click the drop-down arrow next to your name in the top right corner.
2. Click Administration > Case Admin > Review Set > Manage.

   Manage Review Set screen appears.

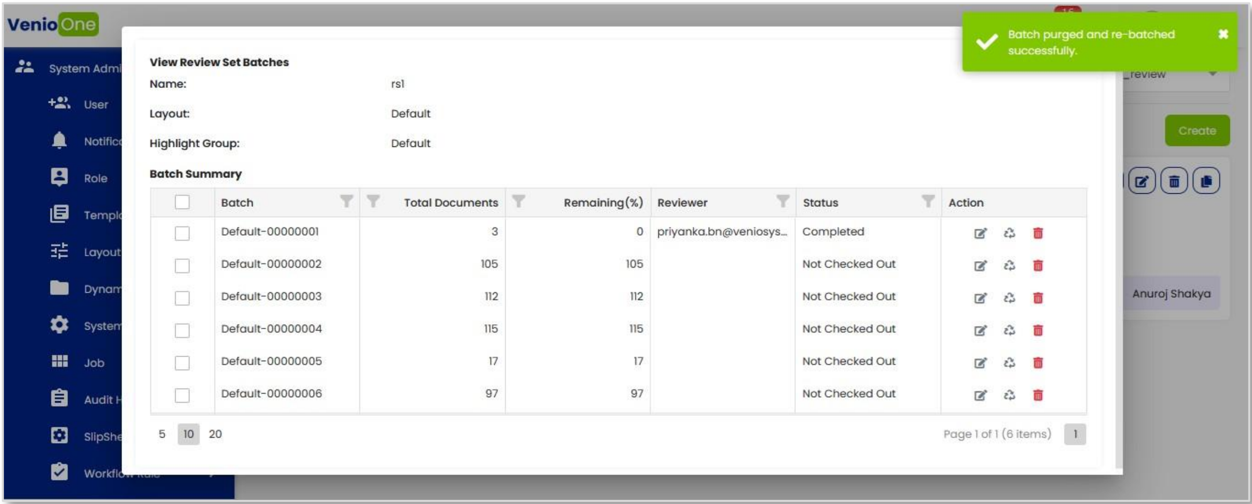
3. From the Case drop down, select the case for which you would like to view.
4. Click on View Icon.

   The View Review Set Batches page appears.

4. Click on the Purge icon for the batch which is in the in-progress status.



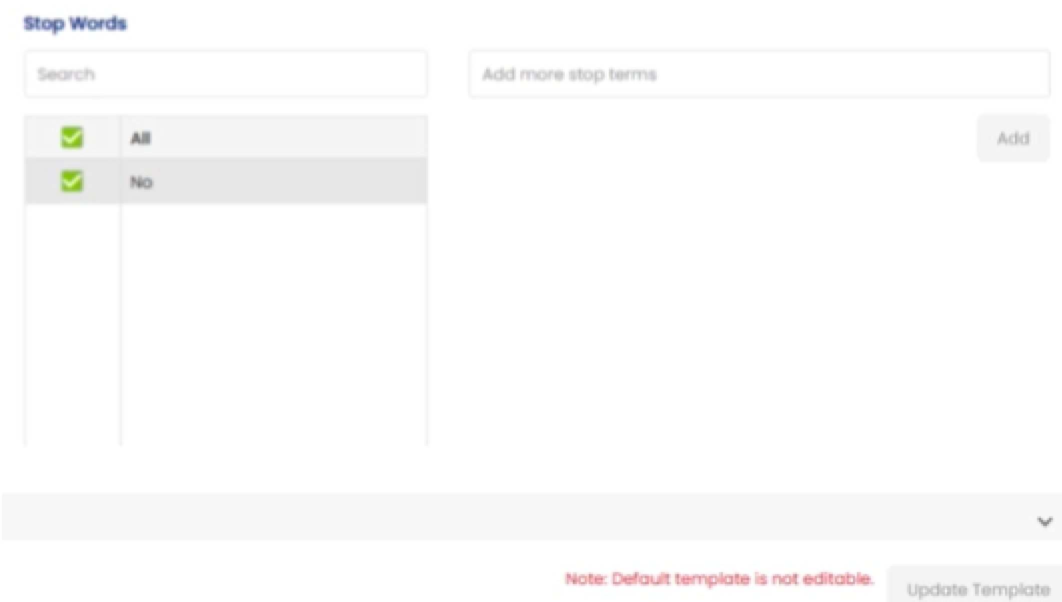
5. A message if you want to commit the documents and create a new batch for the remaining documents appears. Click YES to continue.
6. The Batch Summary table is updated with the status as "Completed" and a message confirming the purging and re-batching appears.



The Batch Summary table is updated with the status as “Completed”

11.5.3 Case Template

You can create and edit the case template. However, if you try to add the stop words for default template, it will not allow you to update the template.

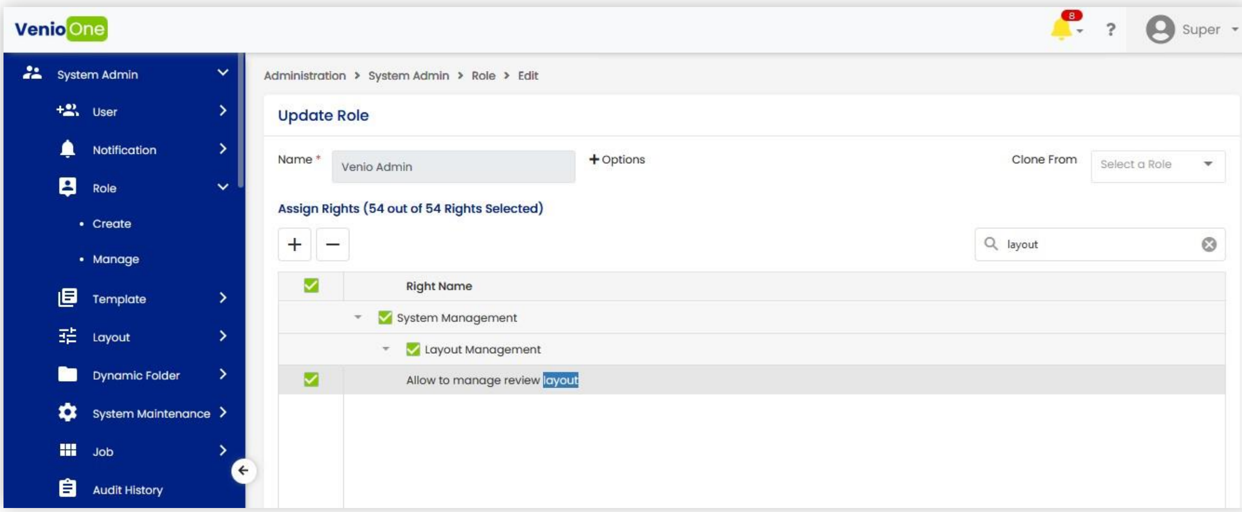


11.6 Layout Admin

To edit/create layouts, it is essential that the user has the permission on Allow to manage Review Layout. Without this permission, the user will not be allowed to create, edit, or delete the layout from the admin and review page.

By default, only Ondemand client admin/site admin/project admin can provide this access.

To access this permission, navigate to Admin Settings > System Admin > Role > Manage. Select the role you wish to edit and click the Edit icon.



Only if this permission is selected by the admin, the user can create, edit, or delete the layout from the admin and review page.

Layouts may be saved at the user level for the Analyze and Review Dashboards. Within the Admin Settings, layouts may be created and managed for the Review Dashboard. Review Layouts are made up of Panels containing various Fields of information. The panels displayed, as well as the fields within them, may be customized.

A default layout may be associated with a user while creating/editing a user

11.6.1 Create a Review Layout

Admin Settings > System Admin > Layout > Create

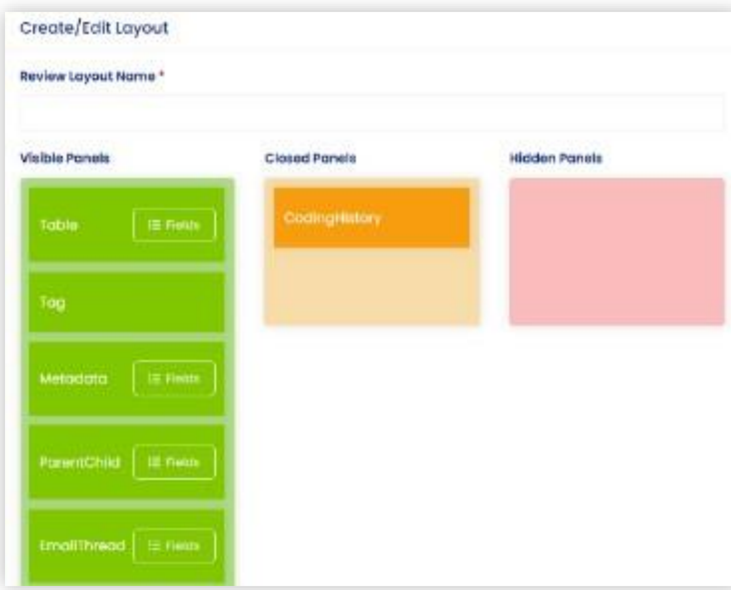
If you wish to make only certain Panels available to users within the Review Dashboard, you may create a Review Layout, which can be selected when creating Review Sets.

Creating a review layout is a two-step process. You first select the Panels and Fields included within the panels. Then, you arrange how the panels are displayed within the three sections of the Review Dashboard. You may also use this function to control which fields are displayed and the order in which they are displayed within the panels.

To create a review layout, follow the steps below:

1. Click the drop-down arrow next to your name in the top right corner.
   Click Admin Settings > System Admin > Layout > Create
   OR
   Admin Settings > Systems Admin > click the Create Layout button.

   The Create/Edit Layout dialog is displayed with three columns containing Visible Panels, Closed Panels, and Hidden Panels.



2. Enter the Review Layout Name.
3. Click-and-drag the panels to the designated columns.

OPTIONAL: Click the Fields buttons within the panels to modify the fields included and display order.

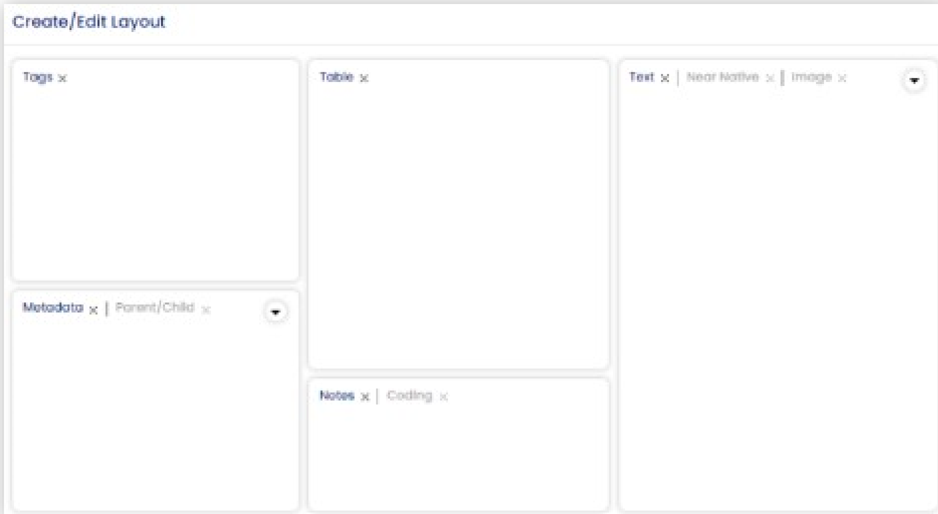
*The Fields-*Panel Name *dialog displays two columns Available Fields and Visible Fields with search bars for each column.*

- Click-and-drag fields from the Visible Fields column to the Available Fields column to review them from view. You may select multiple fields using the check boxes.
- Click-and-drag fields within the Visible Fields column to adjust their display order within the panel.
- Click the Save button to save the field order and visibility within the selected panel.
- The Visible Fields and the order in which they appear are derived from the Global Field Management screen. The same fields and their order will appear in the Review page.

4. Scroll to the bottom of the screen and click the Continue button.

The second Create/Edit Layout dialog displays the layout of the panels within the Review Dashboard.

Default Review Layout



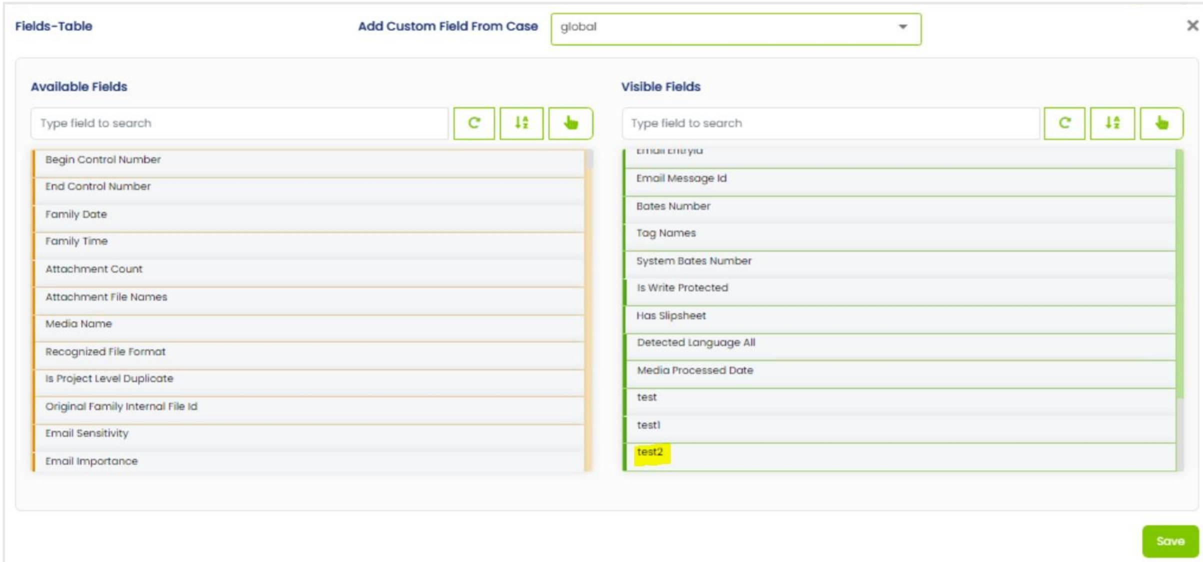
Modified Review Layout

5. Click-and-drag the panels or their edges to resize them. For example, you might want the list of documents in the Table Panel to stretch across all three columns as shown above.

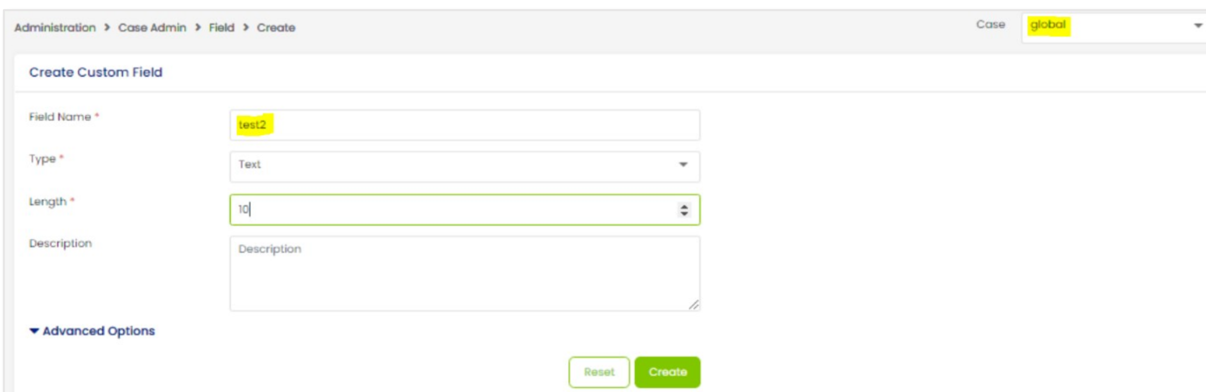
NOTE: There are tabs within some panels for easily displaying similar items.

6. Scroll down and click the Create button to save your layout changes.

While creating and updating the layout from the admin page, you can select a project and the corresponding custom fields from the project to be included in the layout from Available Fields to Visible Fields section. You can select the fields from the Visible Fields section and click Save.



When the same layout is loaded in any other project in the review page, and if the custom field with same name exists in the project load, you can add the same custom field from the Field Management page. Enter the Field Name, select the Type, Length and click Create.



The coding panel displays only the custom fields. When a user does not select any field for that panel, it will display all the permitted custom fields in that panel(for example, the admin created a layout without configuring the field for the coding panel, in that case, the coding panel will show all the permitted coding fields).

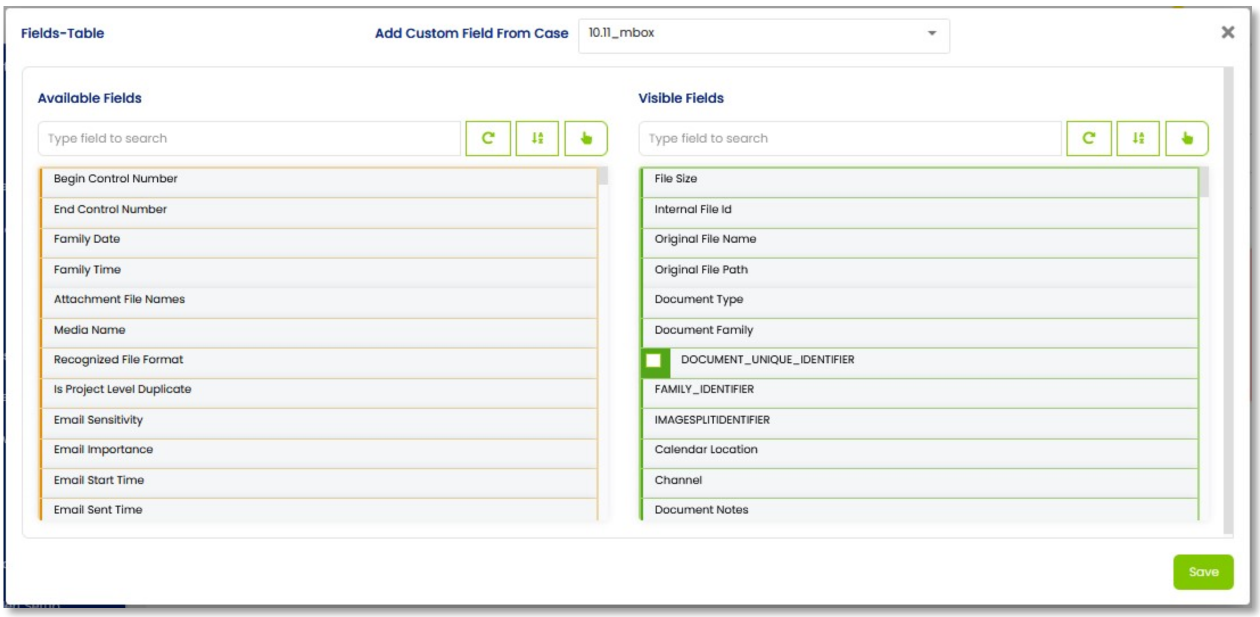
Additionally, if a coding field is created, that coding field need to appear in the panel for default layout and the layouts for which visible fields were not configured (i.e. visible field list is empty).

11.6.2 Order Coding Fields

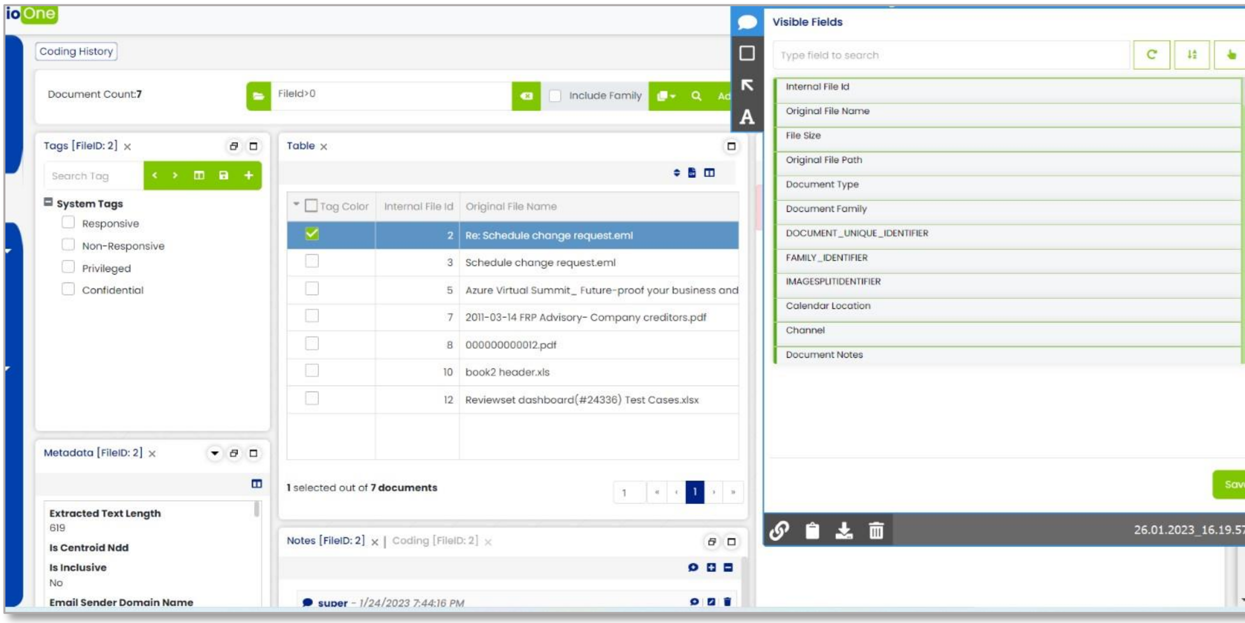
An admin can reorder the coding fields to have the most relevant fields at the top. For this, you can add the fields in coding panel in the layout screen OR if fields are dependent on case, users can drag and drop to rearrange the fields.

To order coding fields, follow the steps below:

1. Navigate to Admin Settings > System Admin > Layout > Manage.
2. Click the Edit icon for the case for which you wish to modify the order.
3. From the Visible Panels, select the fields you wish to order by drag and drop, and click Save.



The order is visible in the Table in the case launchpad screen as per the selections made from the Layout.



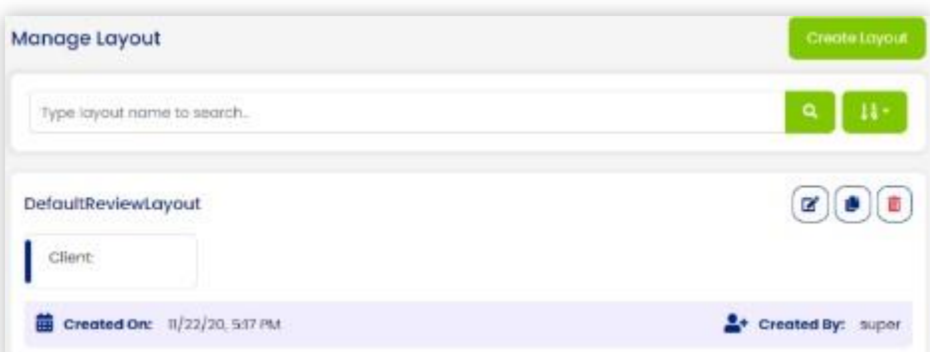
11.6.3 Manage Review Layouts

Admin Settings > System Admin > Layout > Manage

To manage layouts, follow the steps below:

1. Click the drop-down arrow next to your name in the top right corner.
2. Click Admin Settings > System Admin > Layout > Manage

   The Manage Layout screen displays cards for the existing layouts with buttons to Edit, Clone, or Delete a layout.



Use the buttons on the Layout cards to do the following:

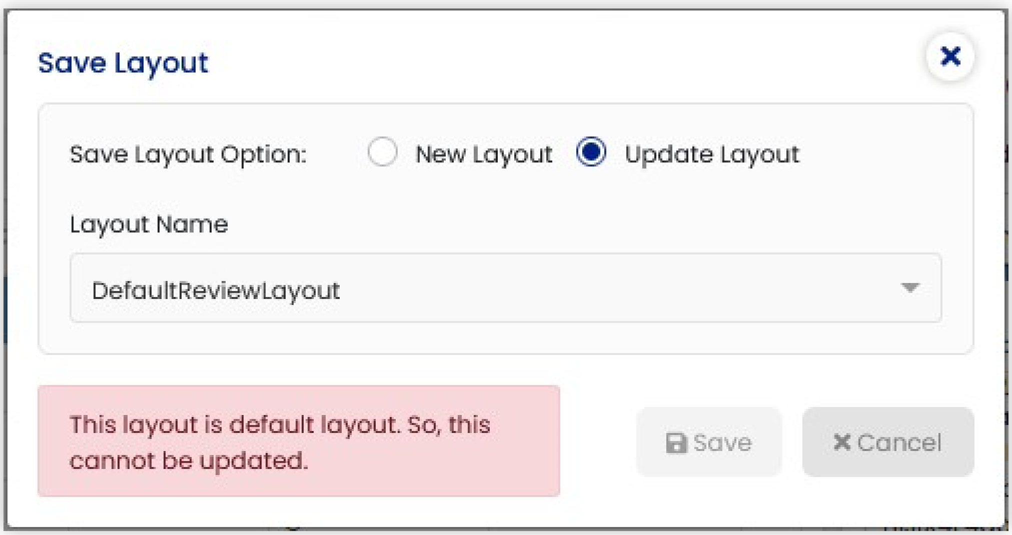
- Click the Edit button and follow the steps in the section above to make changes to the layout.

- Click the Clone button to copy the layout and then follow the steps in the section above to make changes to the cloned layout.
- Click the Delete button to delete a layout.

11.6.4 Editing Layouts

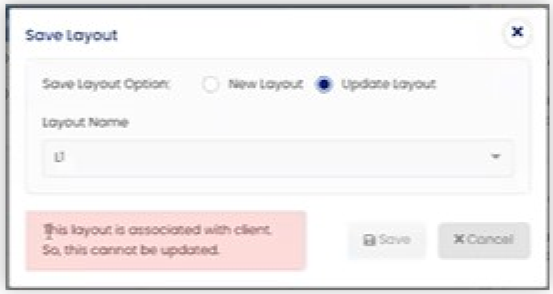
When a user loads the layout or create/update the layout from the review page, that layout is the default layout for the user. The layout is the current layout in the review page i.e., when a user is logging out and logging in, then set that layout in load layout option. All the settings from the layout are reflected/loaded in the review page. User can reorder the fields, close the layout panels, sort the fields, check/uncheck the fields to display in table panel.

While editing the layouts, the Default layouts cannot be edited. If the layout being updated is a default layout, the editing is restricted and the Save button is disabled and the following message is displayed:



Client Layout

Also, you cannot edit the Client layouts. If the layout being updated is a client layout, the editing is restricted and the Save button is disabled and the following message is displayed:



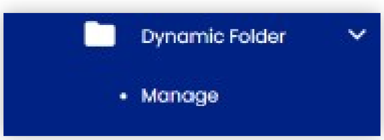
11.7 Dynamic Folder Admin

Dynamic Folders wrap a folder structure around search criteria and are accessed within the Review Dashboard. Items that meet the dynamic folder's search criteria are added to the dynamic folder as the project progresses. Dynamic folders gather documents to enable a number of workflows such as:

- Enabling tiered reviews
- Gathering documents needing translation
- Gathering documents for expert or witness review
- Quality control workflows
- Clearing error files
- Reviewing coding discrepancies

Dynamic folders may be either *Local* or *Global*. Local dynamic folders are only available in one project/case. Global dynamic folders are available in all projects/cases.

The first step to creating a Dynamic Folder is to create the folder container. The second step is to associate the search criteria with the Dynamic Folder.



11.7.1 Create Dynamic Folder

Currently, this functionality is only available within the Desktop Console. It will be coming to VOD soon.

Admin Settings > System Admin > Dynamic Folders > Manage

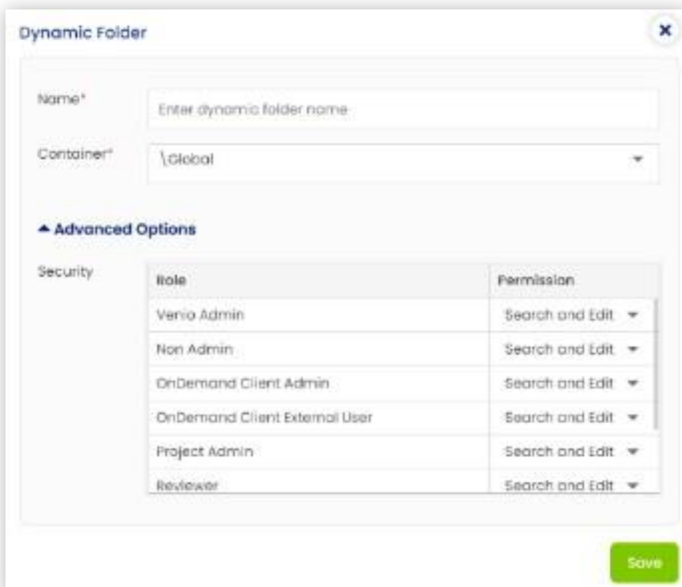
1. Click the drop-down arrow next to your name in the top right corner.
2. Click Admin Settings > System Admin >Dynamic Folders > Manage

The existing Dynamic Folders display with options to Edit or Delete them.

NOTE: You can change the order by using the icon.

3. Click the Create Container button.

The Dynamic Folder dialog is displayed.



Enter the Name for the dynamic folder.

Select the Container for the dynamic folder from the drop-down.

NOTE: Dynamic folders may be either Local or Global. Local dynamic folders are only available in one project/case. Global dynamic folders are available in all projects/cases.

OPTIONAL: Click the Advanced Options link to select which group roles have access to the dynamic folder and their level of access. The three levels of access are:

- Search and Edit (default) – Able to use and modify the dynamic folder
- Search – Able to use the dynamic folder
- None – Unable to see or use the dynamic folder

Click the Save button.

The Dynamic Folder container is created. Search criteria needs to be associate with the dynamic folder.

11.7.2 Associate Search Criteria with a Dynamic Folder

Currently, this functionality is only available within the Desktop Console. It will be coming to VOD soon.

11.7.3 Edit Dynamic Folder

Currently, this functionality is only available within the Desktop Console. It will be coming to VOD soon.

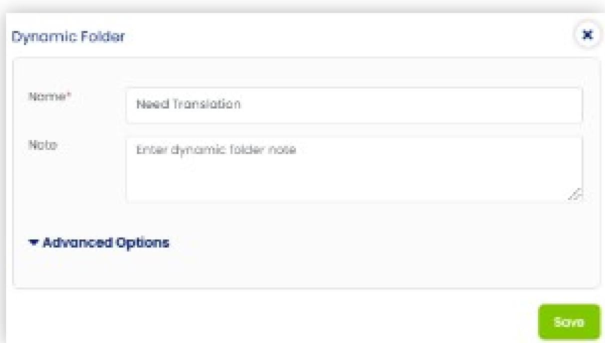
Admin Settings > System Admin > Dynamic Folders > Manage

Click the drop-down arrow next to your name in the top right corner. 2. Click Admin Settings > System Admin >Dynamic Folders > Manage

The existing Dynamic Folders display with options to Edit or Delete them.

Click the Edit button

The Dynamic Folder dialog is displayed.



Make the needed modifications to the dynamic folder.
Click the Save button.

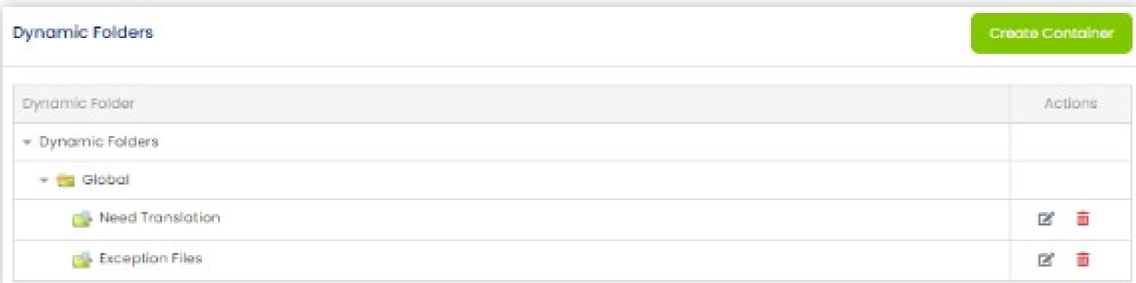
11.7.4 Delete Dynamic Folder

Currently, this functionality is only available within the Desktop Console. It will be coming to VOD soon.

Admin Settings > System Admin > Dynamic Folders > Manage

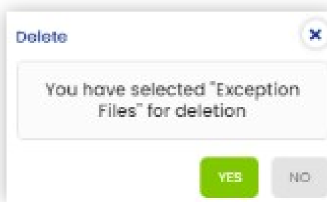
Click the drop-down arrow next to your name in the top right corner. 2. Click Admin Settings > System Admin >Dynamic Folders > Manage

The existing Dynamic Folders display with options to Edit or Delete them.



Click the Delete button.

A confirmation of the deletion is displayed.

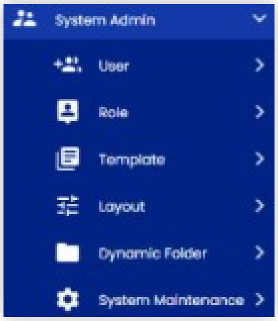


Click the Yes button to delete the dynamic folder.

Note: Only the Venio Admin, Project Admin, and OnDemand Client Admin can access and manage the Global Dynamic Folder from the admin page.

Only the User Group Site Admin, Project User Group and OnDemand User Group are permitted to access and save as the Global Dynamic Folder and Local Dynamic Folder.

11.8 System Maintenance



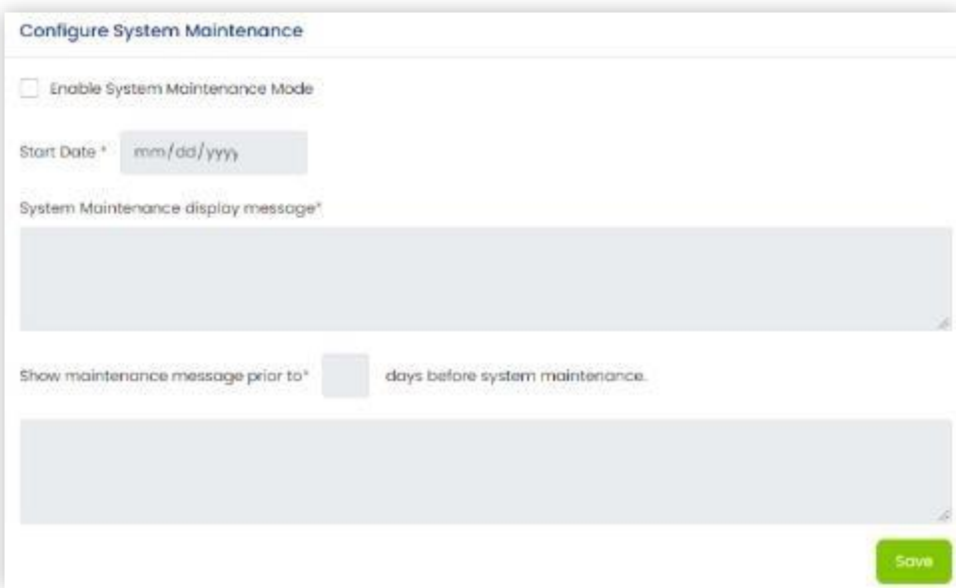
Anytime you need to do maintenance on your VenioOne system, you may configure an alert to your users. The alert may be configured to display a message on the login screen for several days in advance of the maintenance and during the maintenance period.

11.8.1 Configure System Maintenance

Admin Settings > System Admin > System Maintenance

1. Click the drop-down arrow next to your name in the top right corner.
2. Click Admin Settings > System Admin >System Maintenance

The Configure System Maintenance dialog displays.



Check the box to Enable System Maintenance Mode.
Enter the Start Date for the maintenance.

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Enter the System Maintenance display message.
Set the number of days before system maintenance for the maintenance message to display. Enter the message to display prior to the system maintenance period. Click the Save button.

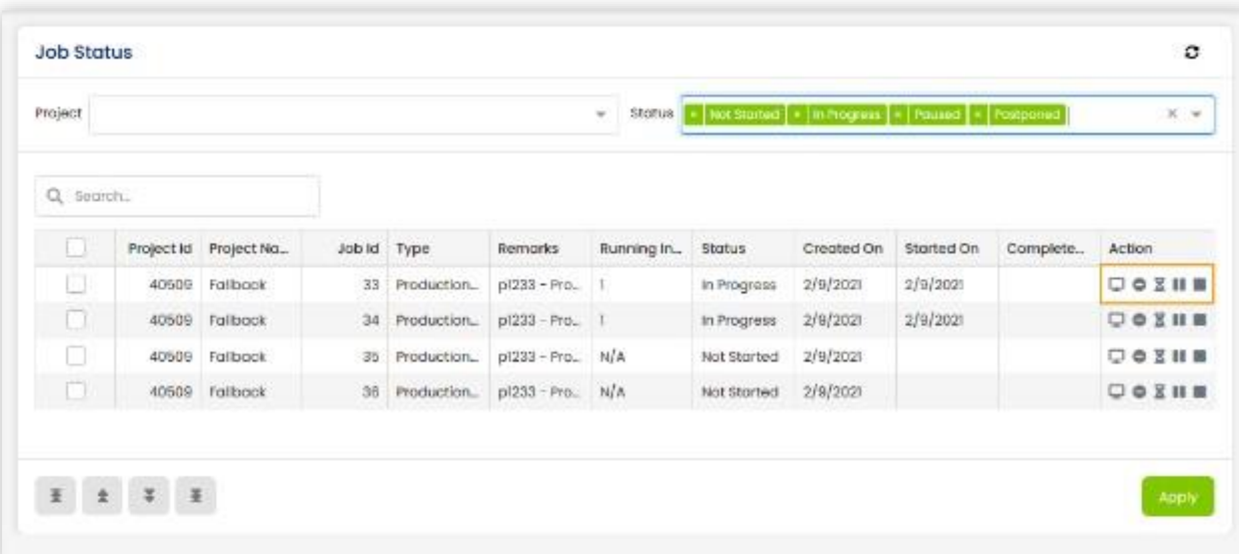
11.9 Job Admin

Within Job Status, you may view processing jobs, their status, and details about the documents processing for a specific job. You also have the ability to re-prioritize jobs.

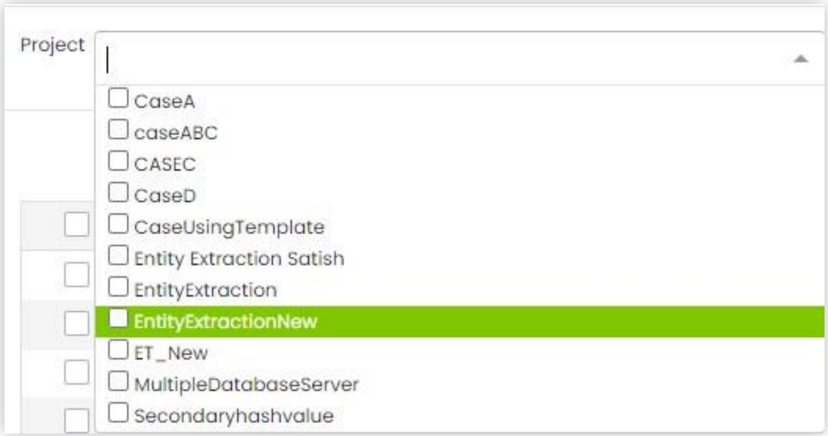
11.9.1 Viewing Job Status

Admin Settings > System Admin > Job >Status

1. Click the drop-down arrow next to your name in the top right corner.
2. Click Admin Settings > System Admin > Job >Status.
   The Job Status dialog displays active jobs for all cases.



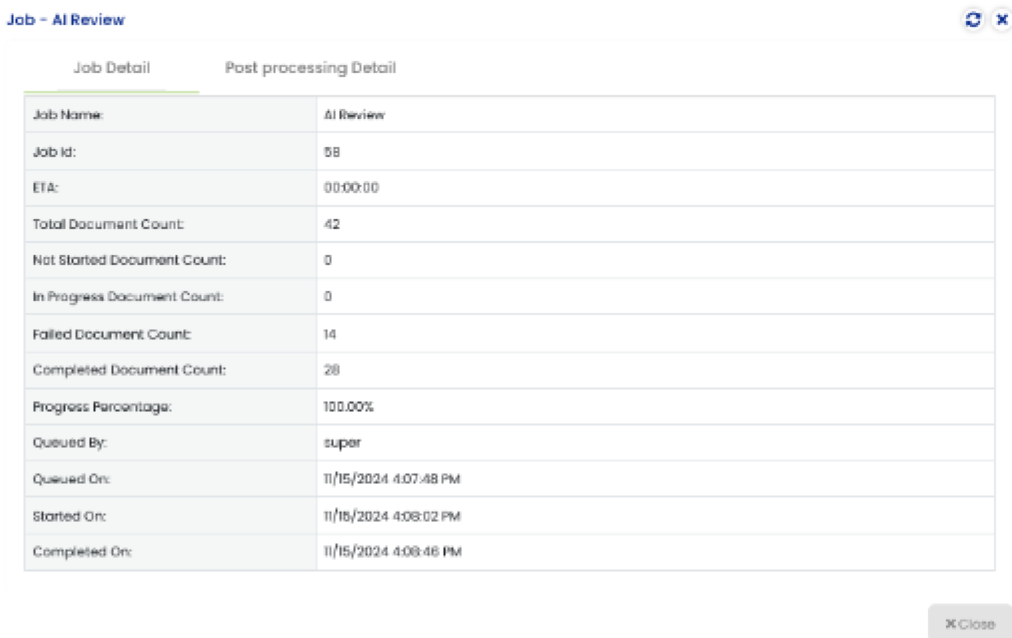
To view only jobs for a specific project, use the Project drop-down menu to select a different project:



The four job statuses shown below in green are displayed by default. You can filter the types of jobs being displayed by using the Status drop-down menu.

To take actions on a job, use the  buttons on the right end of the job's row.

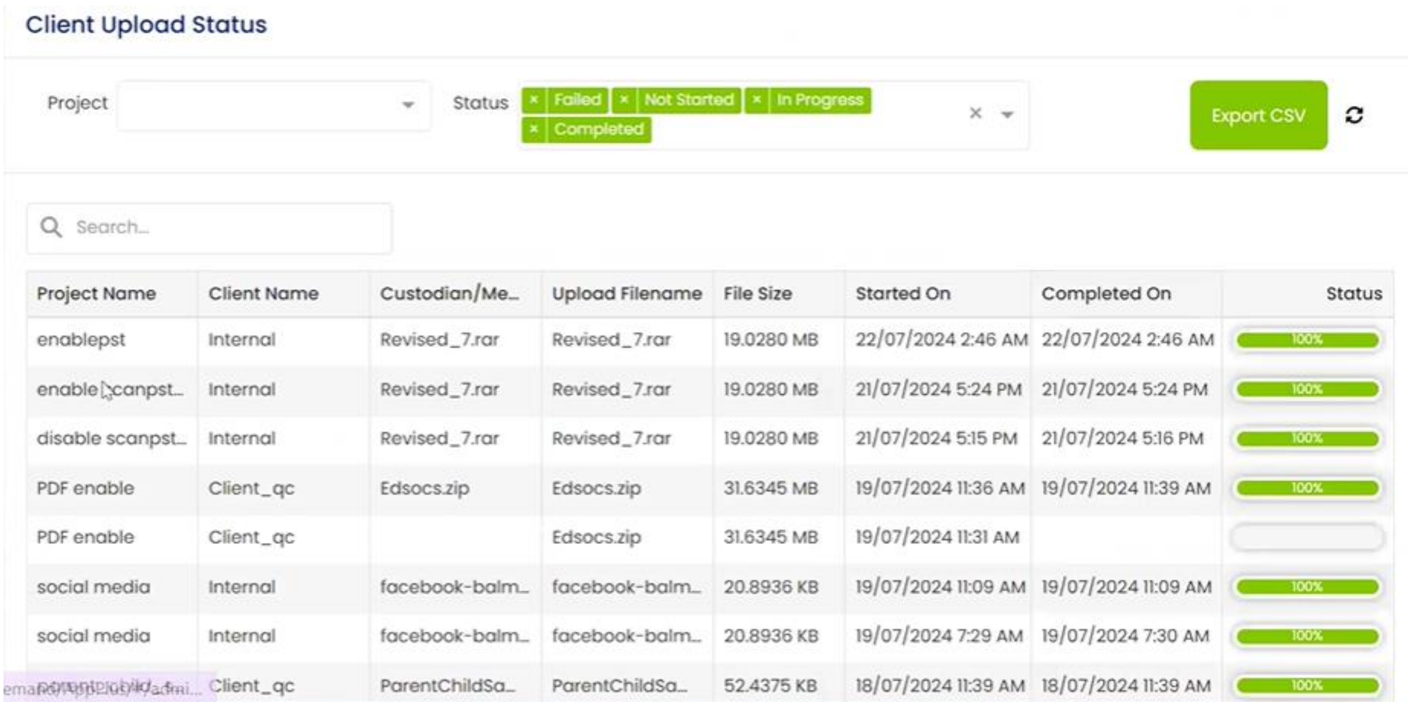
To see details for a job, click the View Job Details button on that job's row.



Viewing Upload Status

The user with appropriate rights will be able to access Upload Status from Admin Settings > System Admin > Job > Upload Status.

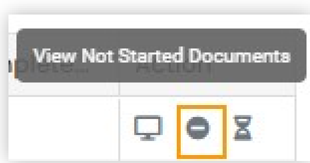
1. Click the drop-down arrow next to your name in the top right corner.
2. Click Admin Settings > System Admin > Job >Upload Status.



Once the data is uploaded for a project, you can check the status of the upload under Status column. If the upload is completed, green colour with 100% done is displayed, if in progress, the percentage of work completed is displayed, and if it is not started, the status will be blank. The custodian will get populated once the upload is completed. You can click on Export CSV button to download all the details in a csv file.

11.9.1.1 View Not Started Documents

You can view the documents within a job that have not been started by clicking the View Not Started Documents button on that job's row.



The File Status Details dialog is displayed. Use the Refresh button in the upper right to update the status. Click the Close button when finished.

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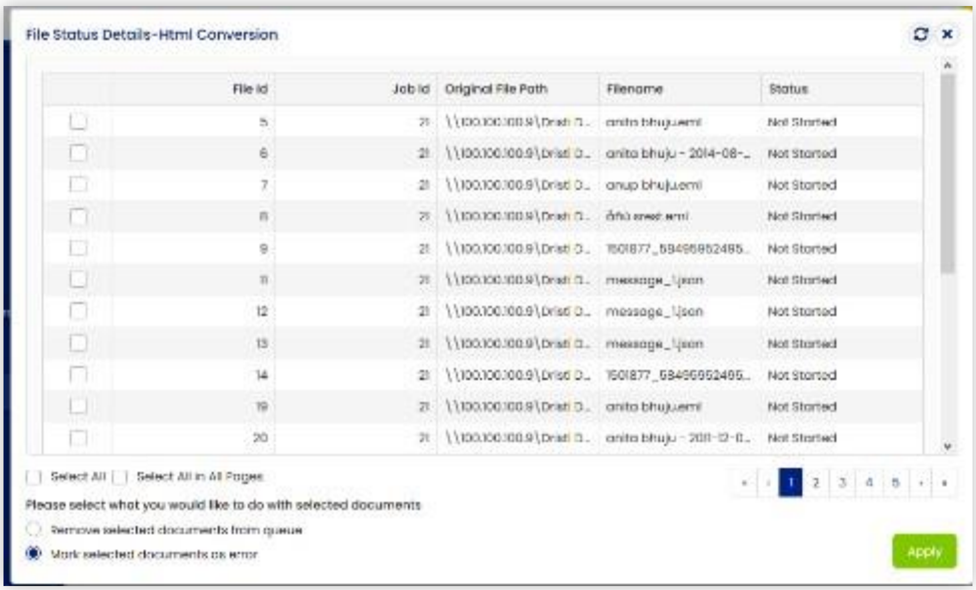


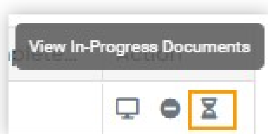
You can take the following actions in this view by selecting the items and using the radio buttons (bottom left):

- Remove selected documents from the queue
- Mark selected documents as errored in the queue

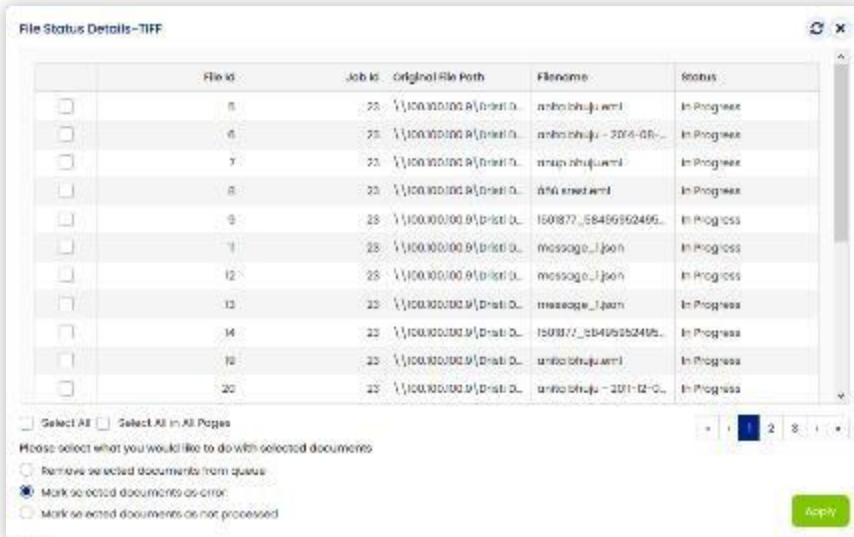
Click the Apply button to apply the changes.

11.9.1.2 View In Progress Documents

You can view the documents within a job that are in progress by clicking the View In-Progress Documents button on that job's row.



The File Status Details dialog is displayed. Use the Refresh button in the upper right to update the status. Click the Close button when finished.



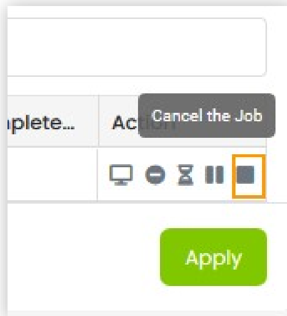
You can take the following actions in this view by selecting the files and using the radio buttons (bottom left):

- Remove selected documents from the queue
- Mark selected documents as errored in the queue
- Mark selected documents as not processed

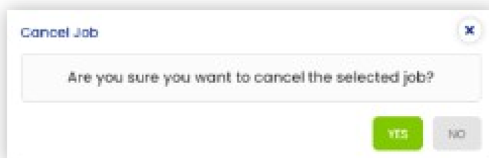
Click the Apply button to apply the changes.

11.9.2 Pause, Cancel and Resume Jobs

Within the Job Status, you may also pause, cancel, or resume jobs. Click the action button on the row of the job you wish to pause, cancel, or resume.



The following confirmation message will display to confirm cancelling the job. Click the Yes button to cancel the job.



11.9.3 Adjusting Job Priority

You can prioritize the jobs by first selecting the job(s) using the check boxes on a job's row and then clicking the up and down arrow buttons at the bottom of the screen.

Set top Priority

Set least priority

Increase Priority

Decrease Priority

11.9.4 Delete Jobs

User can delete jobs which are running/in-progress in case of any issues with the job.

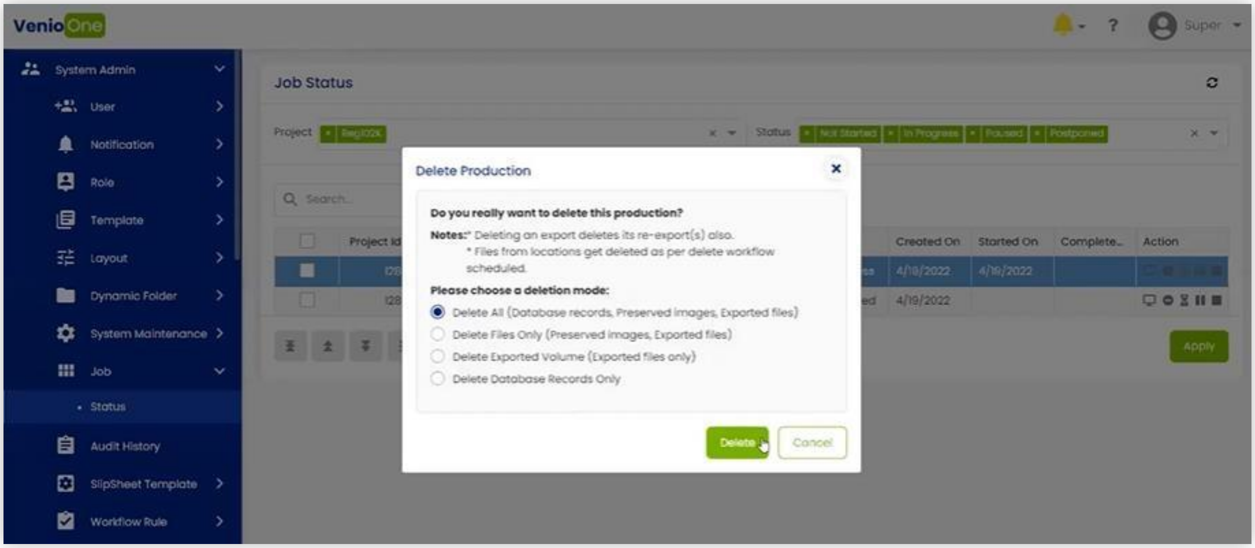
To delete jobs:

1. Navigate to Administration > System Admin > Job > Status.

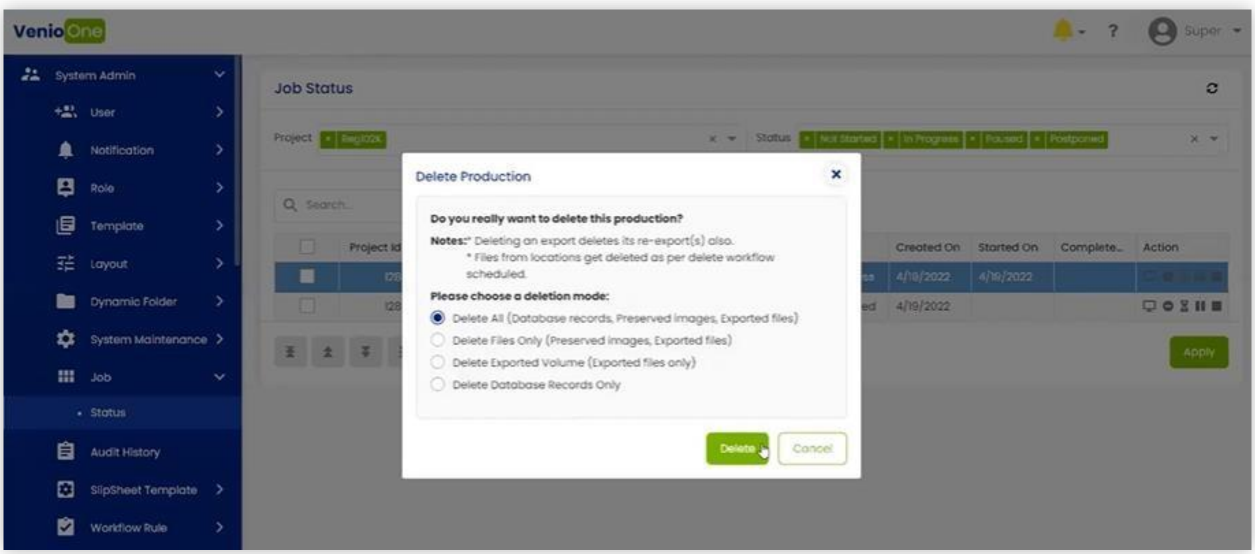
   The Job Status screen appears.

2. Search for the in-progress job you wish to delete.
3. Select the checkbox for the corresponding job, click the Delete icon.

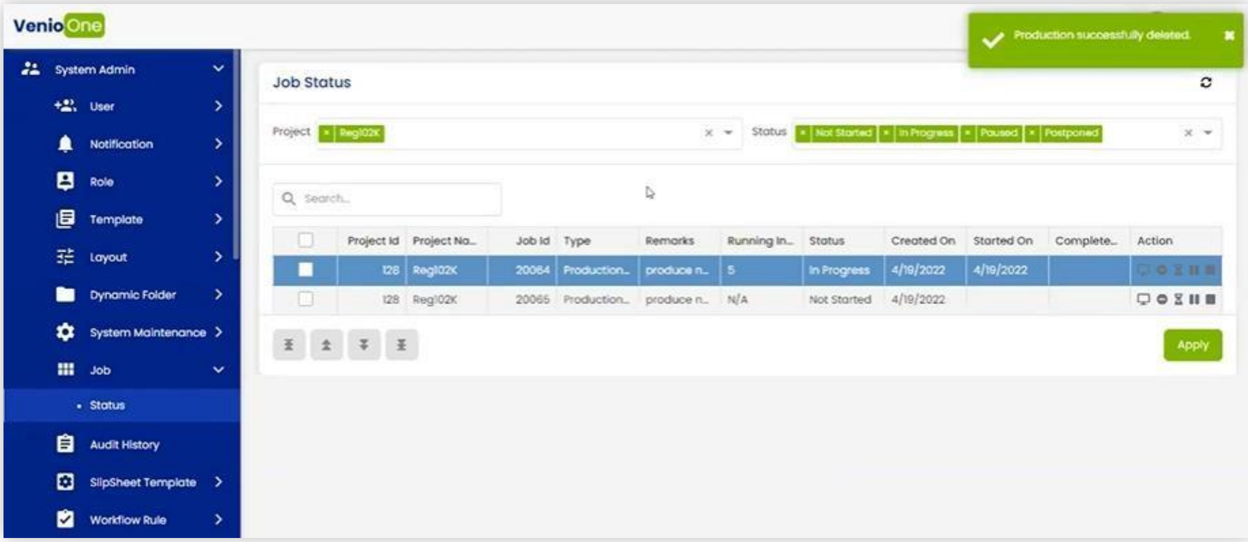
   The Delete Production screen appears.



4. Click Delete. A confirmation message appears.



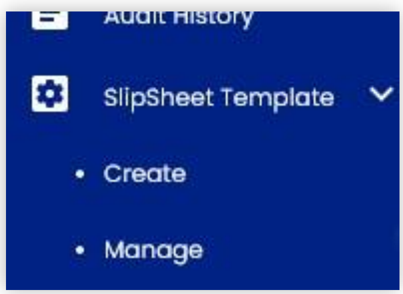
5. The following confirmation message appears:



11.10 Slipsheet Template

This option is used to create or manage various slip sheets.

Admin Settings > System Admin > Slipsheet Template



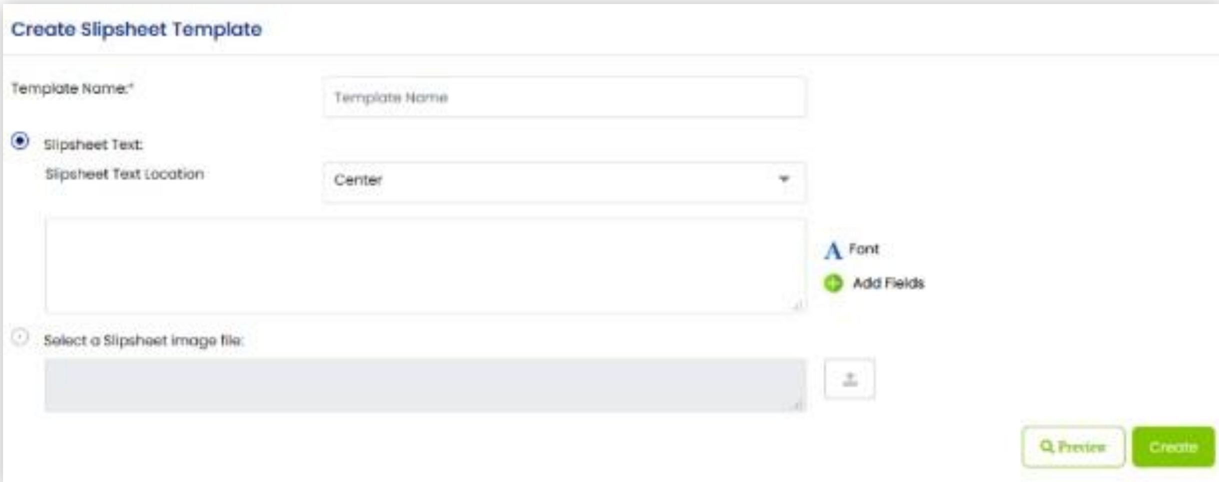
11.10.1 Create Slipsheet Template

This option is used to create a new slip sheet template.

Admin Settings > System Admin > Slipsheet Template > Create

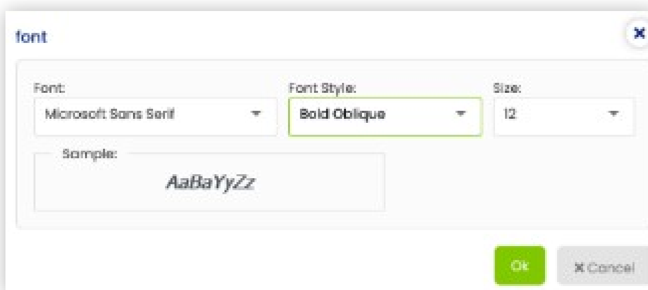
Click the drop-down arrow next to your name in the top right corner. Click Admin Settings > System Admin > Slipsheet Template > Create

The Create Slipsheet Template dialog displays.



Enter the Template Name.
Select the Slipsheet Text radio button if you want your slipsheet to be text-based.

- Use the Slipsheet Text Location drop-down to select where the text displays on the page.
- Use the Font link to edit the font settings of the text.



- Use the Add Fields button to include text from fields in the slipsheet template.
- Click the Preview button to see how the slipsheet page will look.

Alternatively, you can select an image for the by choosing the *Select a Slipsheet image file* option.

7. Click the *Create* button and the slipsheet will be created.

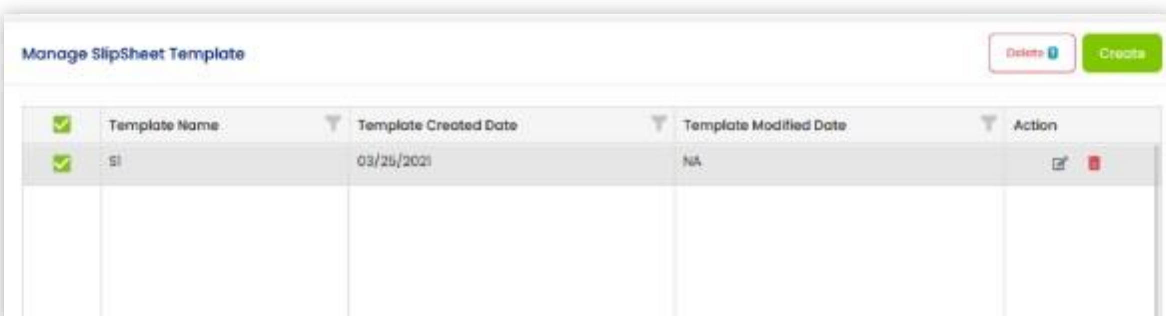
11.10.2 Manage Slipsheet Templates

Here you can edit and delete the already created slipsheet templates. To manage your created siplsheets go to the path.

Admin Settings > System Admin > Slipsheet Template > Manage

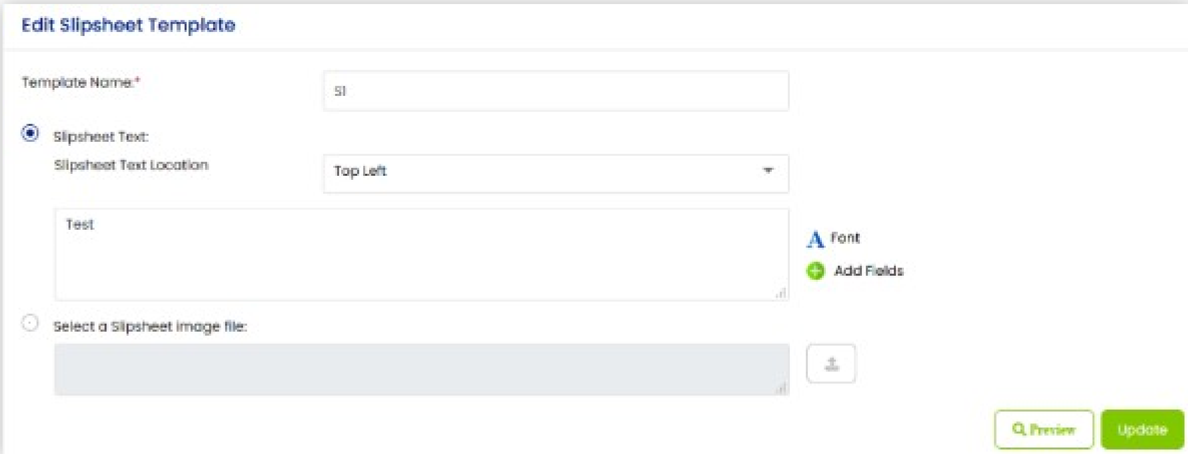
Click the drop-down arrow next to your name in the top right corner. Click Admin Settings > System Admin > Slipsheet Template > Manage

The Manage Slipsheet Template dialog displays.



Click on the Edit button in the Action column.

The Edit Slipsheet Template dialog displays.



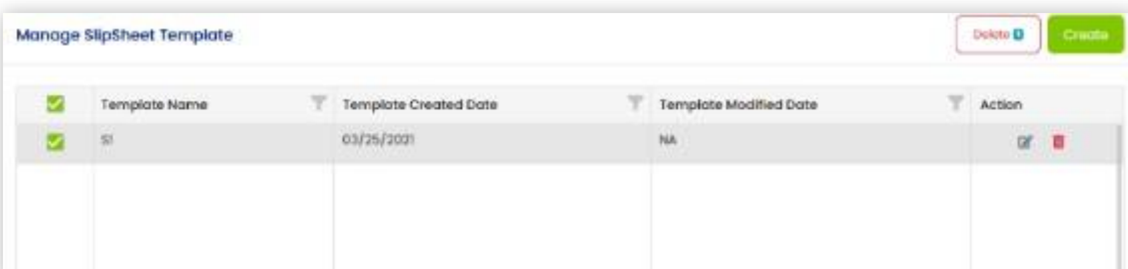
Make the required changes and click the Update button

11.10.3 To Delete a slipsheet

Admin Settings > System Admin > Slipsheet Template > Manage

Click the drop-down arrow next to your name in the top right corner. Click Admin Settings > System Admin > Slipsheet Template > Manage

The Manage Slipsheet Template dialog displays.

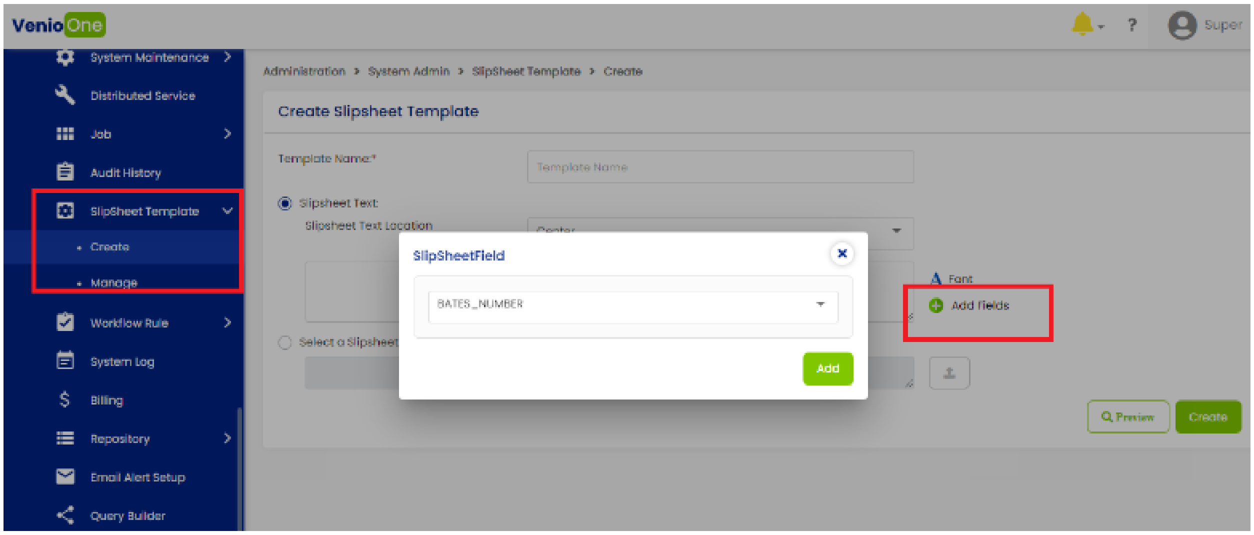


2. Select any slipsheet(s) using the checkboxes.

3. Click the Delete button.

4. Click Ok to confirm.

NOTE: Before using the slipsheet in the Export, Slipsheet template needs to be created, to create the slipsheet template, the user have to navigate to Admin section and select slipsheet template. Click on create template would open up the wizard to create the slipsheet template. Insert the template name , on the slipsheet text, select the add field, when add field is selected, the UI to select the fields pops up, select the desired fields which need to be displayed in slipsheet and click on create. This will create the slipsheet template.



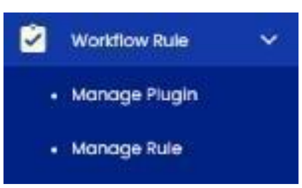
In the Production, When the images are either not available or if not exported,the slipsheet option is selected. While selecting the slipsheet the above created slipsheet can be used. When export is completed, the image slipsheet should be populated with the value of the field which was selected while creating the slipsheet template.

11.11 Workflow Rules

Administration > Systems Admin > Workflow Rule

To automate recurring tasks In VenioOne, you can automatically create and execute tasks from the workflow scheduler using Workflow Rules. Rules either perform specific functions within VenioOne (such as adding/removing tags) or execute Plugins (such as deleting files or calculating storage).

There are two submenus under Workflow Rules (as shown in the screenshot below) for either managing the Rules or the Plugins.



11.11.1 Manage Plugins

Administration > Systems Admin > Workflow Rule > Manage Plugin

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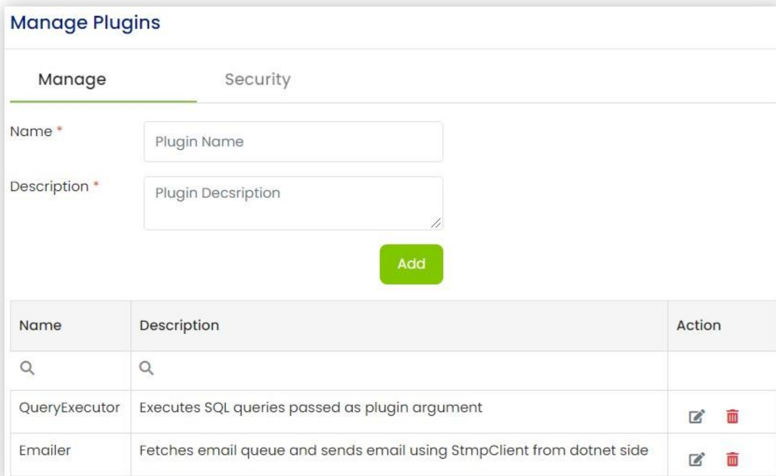
The Manage Plugin dialog is used to manage plugins, which execute tasks you have scheduled using rules. The dialog to manage plugins has two tabs: Manage and Security.

> NOTE: Plugins should be added to the Plugin folder where Venio is installed: C:\Program Files\Venio\Venio Task Synchronizer\Plugin.



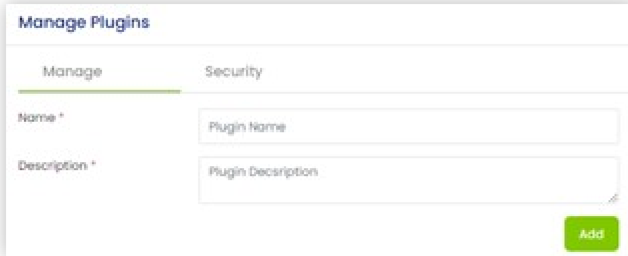
Some of the default plugins available are:

- DeleteFiles
- ProjectStoragTOAlculator
- Emailer
- PasswordAndAccountExpiry
- QueryExecutor
- ReportUploader
- StorageSpaceNotifier
- SearchProcessor

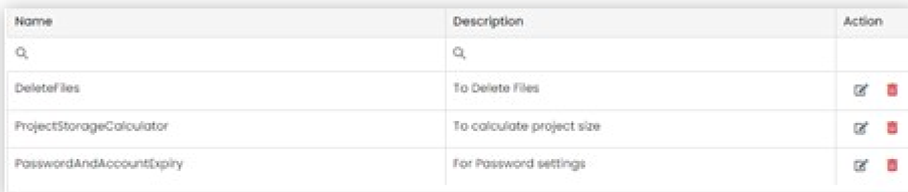
11.11.1.1 Add/Remove Plugins

The Manage tab of the Manage Plugins dialog is used to add or remove plugins. When a new plugin is added to the plugin folder, you need to register the plugin in the database to be able to use it. This is done by adding the plugin within VOD.

To add a plugin, enter a Name and Description and then click the Add button. The name specified should be the same as the name of the plugin stored in the plugin folder.



A list of plugins is displayed at the bottom of the dialog. Use the Search fields at the top of the Name and Description columns to locate plugins. Buttons in the Action column may be used to Edit or Delete plugins.

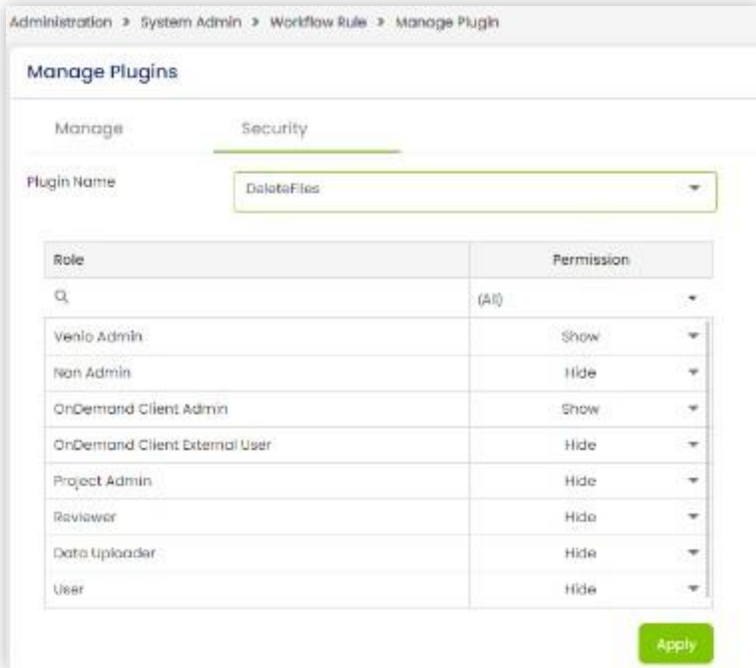


Name	Description	Action
DeleteFiles	To Delete Files	
ProjectStorageCalculator	To calculate project size	
PasswordAndAccountExpiry	For Password settings	

11.11.1.2 Plugin Security

After a plugin has been added, the Security tab of the Manage Plugins dialog lets you determine which roles have permission to use the plugin.

To change access rights for a plugin, select the plugin from the Plugin Name drop-down list. Then, use the drop-down list adjacent to each Role to set the Permission level for that group. Click the Apply button to save the changes.



11.11.2 Manage Rules

Administration > Systems Admin > Workflow Rule > Manage Rule

Rules are used to automate common tasks and may be enabled/disabled as needed. They can be set to run one time or recurring on a specified schedule. They may be project-specific or general meaning non-project-specific.

The Automation Workflow Rules dialog is used to:

- Create new rules
- Edit existing rules · Enable/disable rules
- Delete rules.

There are three types of rules that can be created:

- Non Project Specific Rules – Execute a plugin across all projects and documents
- Project-Specific Unconditional Rules- Execute a plugin across all documents within a specified project
- Project-Specific Conditional Rules – Execute an action or plugin across specific documents within a project

11.11.2.1 Create a Non Project Specific Rule

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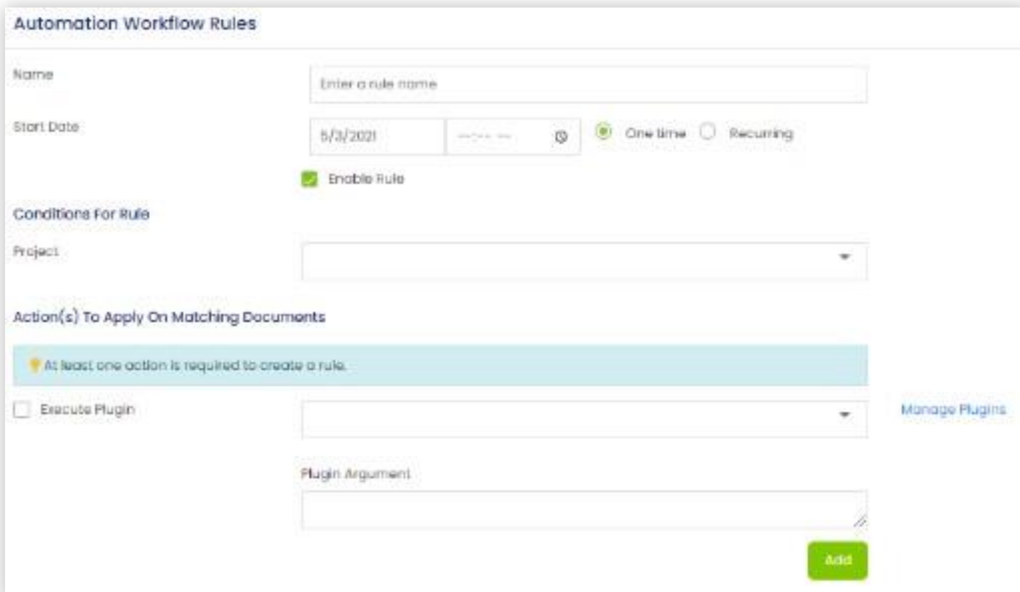
General rules that are not specific to a particular project will execute a plugin across all projects and documents.

To create a general rule, follow the steps below:

1. Click drop-down arrow next to your name in the top right corner.

2. Click Admin Settings > System Admin > Workflow Rule > Manage Rule.

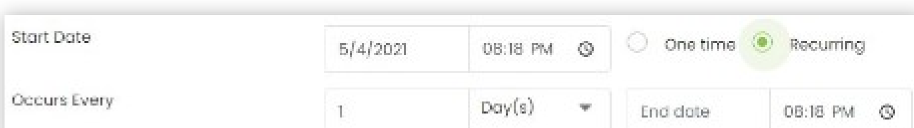
   The Automation Workflow Rules dialog is displayed.



3. Enter a Name for the rule.

4. Select whether the rule should be One-time or Recurring using the radio buttons.

5. Specify the Start Date and time for the rule to take effect (for a One-time rule) OR Use the drop-down options to specify that the rule Occurs Every (for a Recurring rule).



6. Check the Enable checkbox to enable the rule.
7. From the Project drop-down, select Non Specific Project.

8. Select the Execute Plugin checkbox.

9. Select the plugin from the drop-down list.

10. Enter the Plugin Argument.

NOTE: The Manage Plugin link will open the Manage Plugins dialog.

11. Click the Add button to add your rule.

11.11.2.2 Create a Project-Specific Unconditional Rule

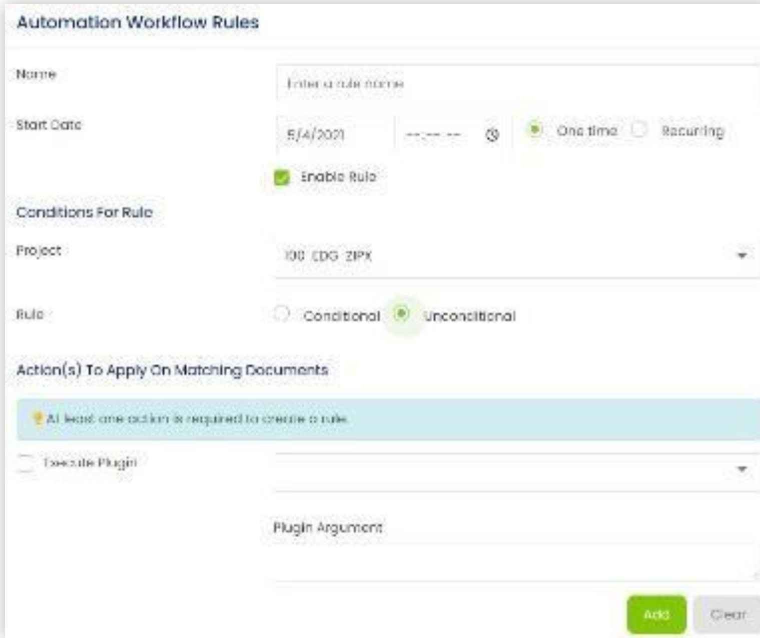
Rules that are specific to a project, but unconditional, will simply execute a plugin without specifying which documents or other conditions apply.

To create a project-specific unconditional rule, follow the steps below:

1. Click drop-down arrow next to your name in the top right corner.

2. Click Admin Settings > System Admin > Workflow Rule > Manage Rule.

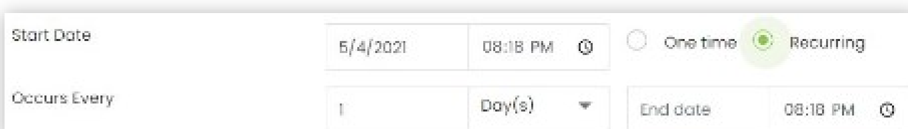
   The Automation Workflow Rules dialog is displayed.



3. Enter a Name for the rule.

4. Select whether the rule should be One-time or Recurring using the radio buttons.

5. Specify the Start Date and time for the rule to take effect (for a One-time rule) OR use the drop-down options to specify that the rule Occurs Every (for a Recurring rule).



6. Check the Enable checkbox to enable the rule.

7. From the Project drop-down, select a project.

8. Select the Unconditional radio button.

9. Select the Execute Plugin checkbox.

10. Select the plugin from the drop-down list.

11. Enter the Plugin Argument.

NOTE: The Manage Plugin link will open the Manage Plugins dialog.

12. Click the ADD button to add your rule.

11.11.2.3 Create a Project-Specific Conditional Rule

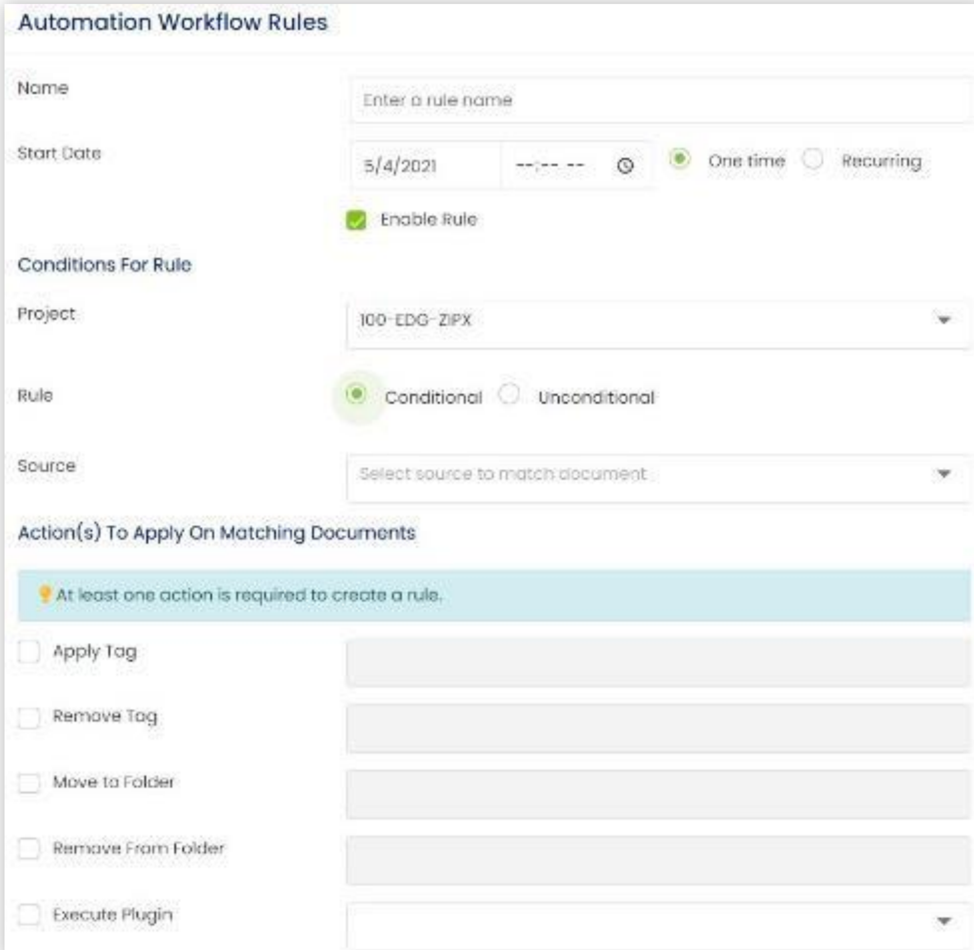
Conditional rules that are specific to a project are more granular in that you select a source from within the project and then execute action(s) or a plugin only on files that meet the specified criteria. However, you may apply multiple actions to the files meeting the criteria.

To create a project-specific conditional rule, follow the steps below:

1. Click drop-down arrow ▾ next to your name in the top right corner.

2. Click Admin Settings > System Admin > Workflow Rule > Manage Rule.

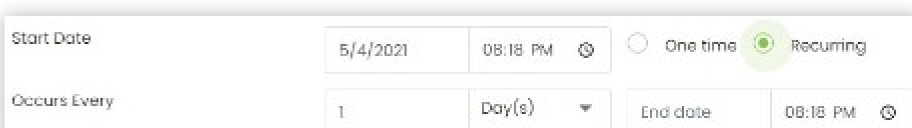
   The Automation Workflow Rules dialog is displayed.



3. Enter a Name for the rule.

4. Select whether the rule should be One-time or Recurring.

5. Specify the Start Date and time for the rule to take effect (for a One-time rule) OR use the drop-down options to specify that the rule Occurs Every (for a Recurring rule).



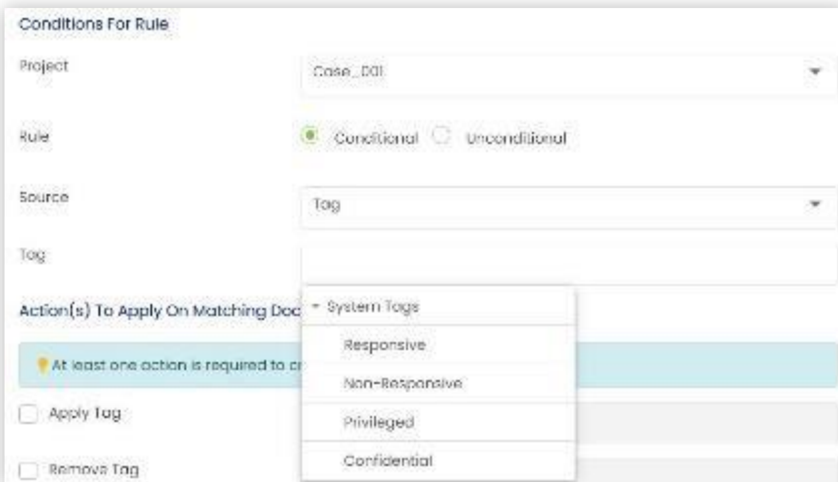
6. Check the Enable checkbox to enable the rule.

7. From the Project drop-down, select a project.

8. Select the Conditional radio button.
9. Select a Source type from the drop-down list:

- Dynamic Folder
- Tag
- Folder
- Saved Search

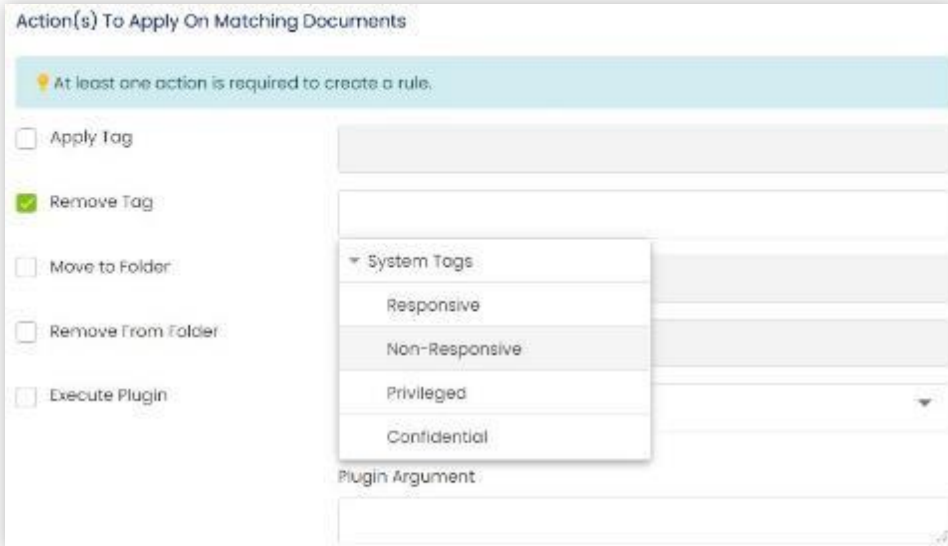
10. Click into the field and select a specific Dynamic Folder, Tag, Folder, or Saved Search.



11. Select the check boxes for the Action(s) to Apply:

- Apply Tag
- Remove Tag
- Move to Folder
- Remove from Folder
- Execute Plugin

12. Specify the criteria for the selected action(s).

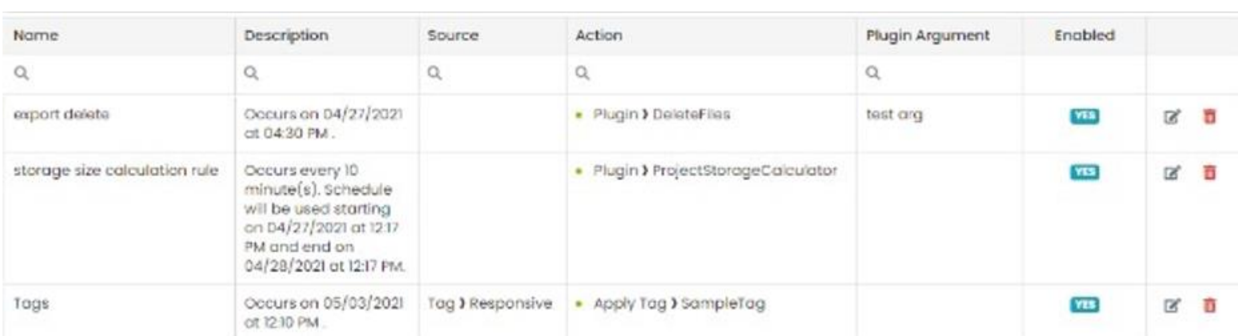


13. Click the ADD button to add your rule.

11.11.2.4 Edit or Delete a Rule

1. Click drop-down arrow next to your name in the top right corner.
2. Click Admin Settings > System Admin > Workflow Rule > Manage Rule.

The Automation Workflow Rules dialog is displayed with a list of rules at the bottom of the page.

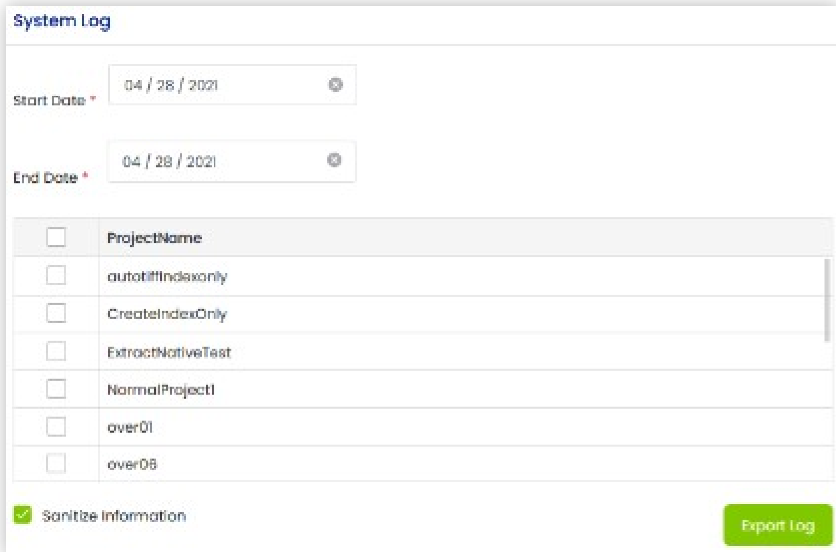


3. Click the Edit or Delete button adjacent to the rule.

11.12 System Logs

System logs can be generated that contain detailed information about a single project or multiple projects at a time. Additionally, the logs may be sanitized of specific information as detailed below.

Admin Settings > System Admin > System Log



11.12.1 Generating System Logs

To generate system logs, follow the steps below:

1. Click the drop-down arrow next to your name in the top right corner.

2. Click Admin Settings > System Admin > System Log.

   The System Log dialog displays option settings.

3. Enter the desired dates for the System Log in the Start/End Date fields.

   NOTE: The current date is selected by default.

4. Select one or more projects using the check boxes in the ProjectName list.

5. Optional: Select the Sanitize information check box to remove specific information from the system logs.

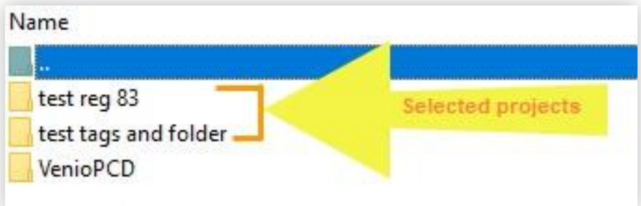
6. Click the Export Log button to generate and export the required logs.

   The system logs are exported as a.zip file to your Downloads folder.

11.12.2 System Log Contents/Structure

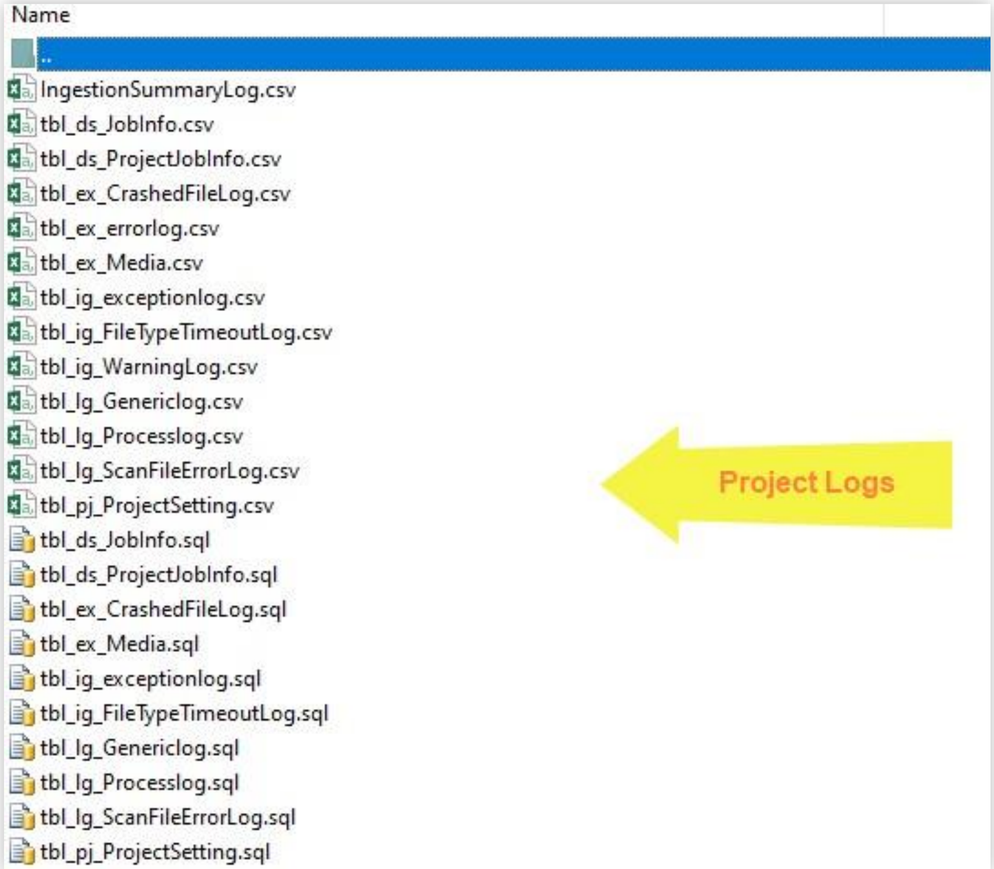
The exported system logs are structured as follows:

One folder is created for PCD (database) level information and other folders for the Project level information according to the number of selected projects.



Logs inside the PCD (database) folder:

Logs inside each Project folder:



11.12.3 Sanitize Information

If chosen, the information in the generated logs will be sanitized. The check box to *Sanitize Information* is displayed only when the control setting key ALLOW_LOG_SANITIZATION = 1.

When Sanitize Information is selected, the following information will be sanitized in the exported log and hence this information will not be available in the log:

- Project Name
- Custodian Name
- Media Name
- Display Remarks
- File Path

Unsanitized Log Example:

A	B	C	D	E	F	G	H	I	J
Custodian	MediaId	MediaName	FileLocation	MediaStatus	ScanStatus	IndexLocation	DrillLevel	parsed	indexed
1	1	All	\\fs02.ad.veniosystems.com\NS Project\test tags and folder	Processed	2	\\fs02.ad.veniosystems.com\	-1	2	2
2	2	sample doc for vod 03	\\fs02.ad.veniosystems.com\NS Project\test tags and folder	Processed	2	\\fs02.ad.veniosystems.com\	-1	2	2

Sanitized Log Example:

A	B	C	D	E	F	G
CustodianId	MediaId	MediaStatus	ScanStatu	DrillLevel	parsed	indexed
1	1	Processed	2	-1	2	2
2	2	Processed	2	-1	2	2

NOTE: Information like Media Name and File path, etc. have been sanitized.

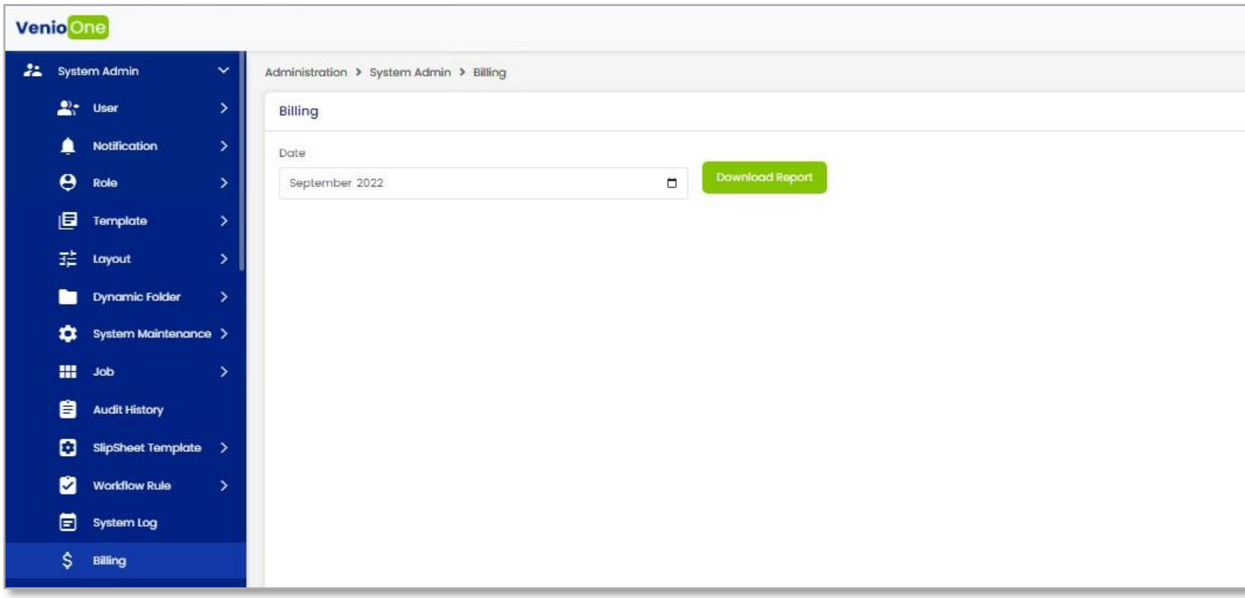
11.13 Billing

As a System Admin, you can generate a report for each client listing out all their projects in VOD. You can generate the billing report for a specified date range and export the same as XSLX.

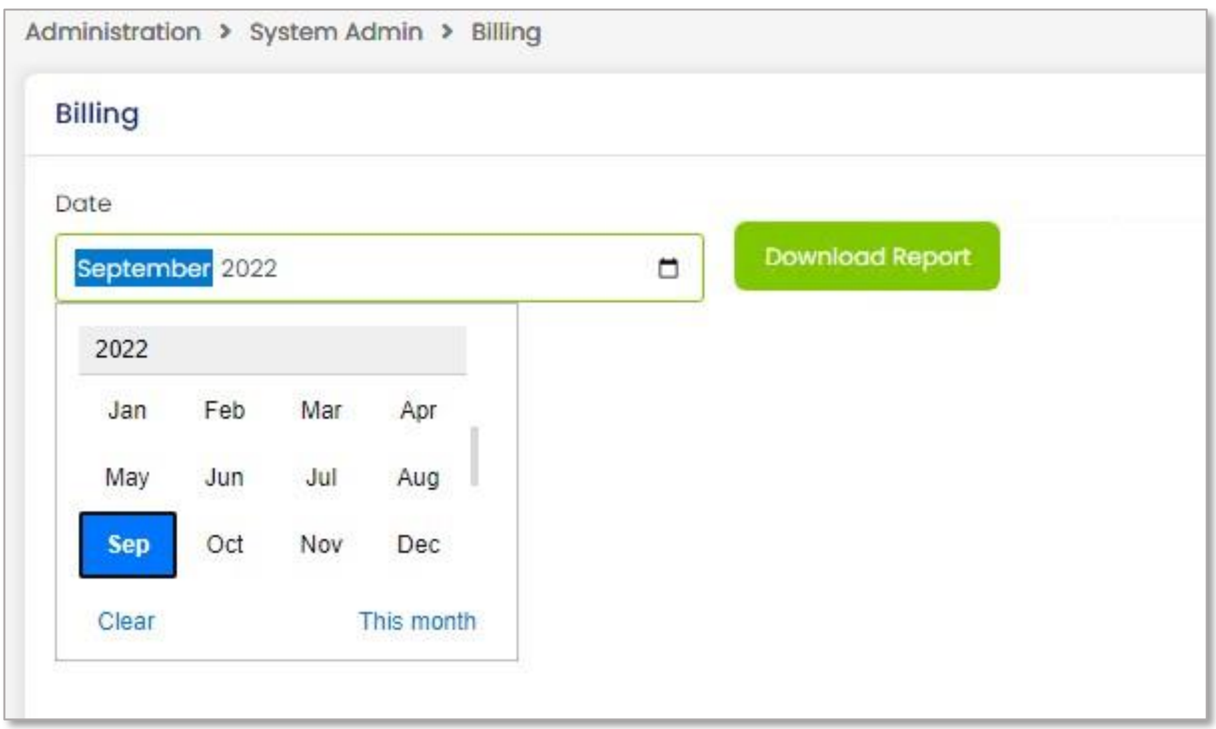
To generate billing report:

1. Navigate to Admin Settings > System Admin > Billing.

The Billing screen appears.



2. Select the date range by clicking on the calendar icon in the Date field.



3. Click Download Report. The report Billing Reports is generated with following Columns:
   - Project Name
   - Created Date

- Source Location Size (GB)
- Database Size (GB)
- Project Location Size (GB)
- Production Location Size (GB)
- Total Size (GB)
- Peak Size (GB)

Apart from the above columns, Other Categories records the storage space used by the uploaded files in the repositor in the “Other Storage” field.

11.14 Repository Settings

Admin Settings > System Admin > Repository

To maintain good control over where case data is located, you will want to designate data repositories for your end users. To make things easy for end users, VenioOne cases utilize Source,
Project and Export repositories tied to the Client. By creating designated Source, Project, and Export repositories, users may upload and work from designated locations set by the administrator and export to a specified location for the client.

IMPORTANT: In order for the repository to be available to end users for uploading data, it must first be associated with the client in the VenioOne Desktop Console.

11.14.1 Create Repository

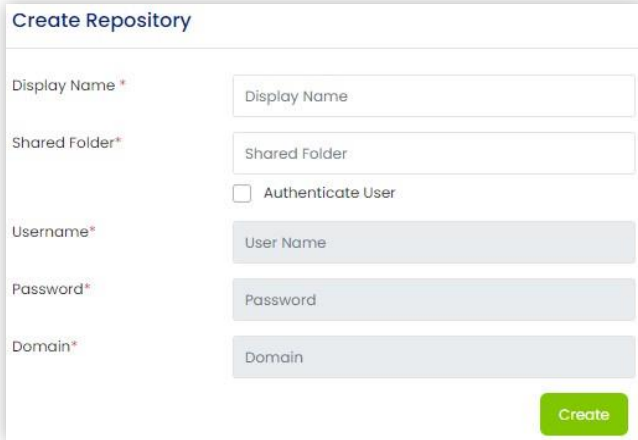
Admin Settings > System Admin > Repository > Create

To create a repository location, follow the steps below:

Click the drop-down arrow next to your name in the top right corner.

Click Admin Settings > System Admin > Repository > Create.

The Create Repository dialog will be displayed.



Enter a Display Name for the repository.
Enter the Shared Folder location path.
Check the Authenticate User check box
Enter the Username, Password, and Domain credentials needed e.g., the Venio Service account.
Click the Create button.

If created successfully, the repository will be included in the list in the Manage Repository dialog.

IMPORTANT: In order for the repository location(s) to be available to end users for uploading data, it must first be associated with the client in the VenioOne Desktop Console.

Go to the VenioOne Desktop Console and edit the client to include the repository location(s).
When uploading files from VOD, the user can now select the source location by choosing the Repository option.

11.14.2 Manage Repository

Admin Settings > System Admin > Repository > Manage

After repositories are established, they may be modified or deleted from the Manage Repository dialog. Uploading to the repository is also possible through this dialog using the Upload icon available for the Upload Locations.

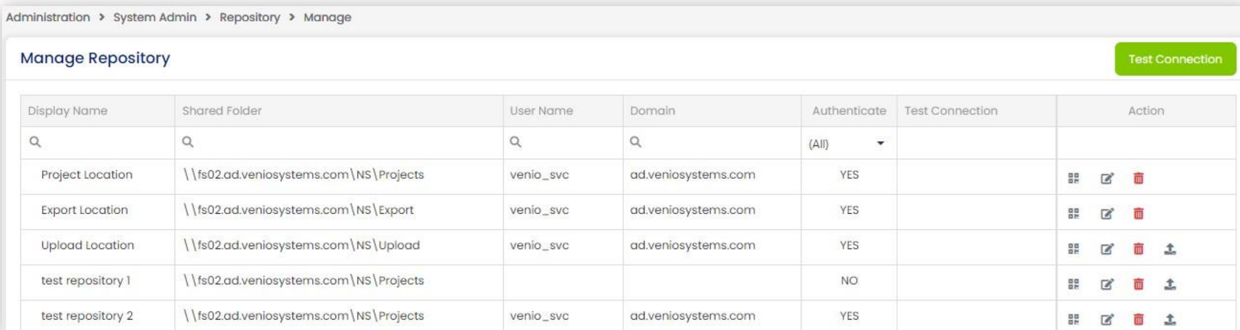
Use the Search options at the top of the columns to locate a specific repository. To ensure a repository will work for your users, the connection can be tested using the Test Connection button.

To edit or delete a repository location, follow the steps below:

Click the drop-down arrow next to your name in the top right corner.

Click Admin Settings > System Admin > Repository > Manage.

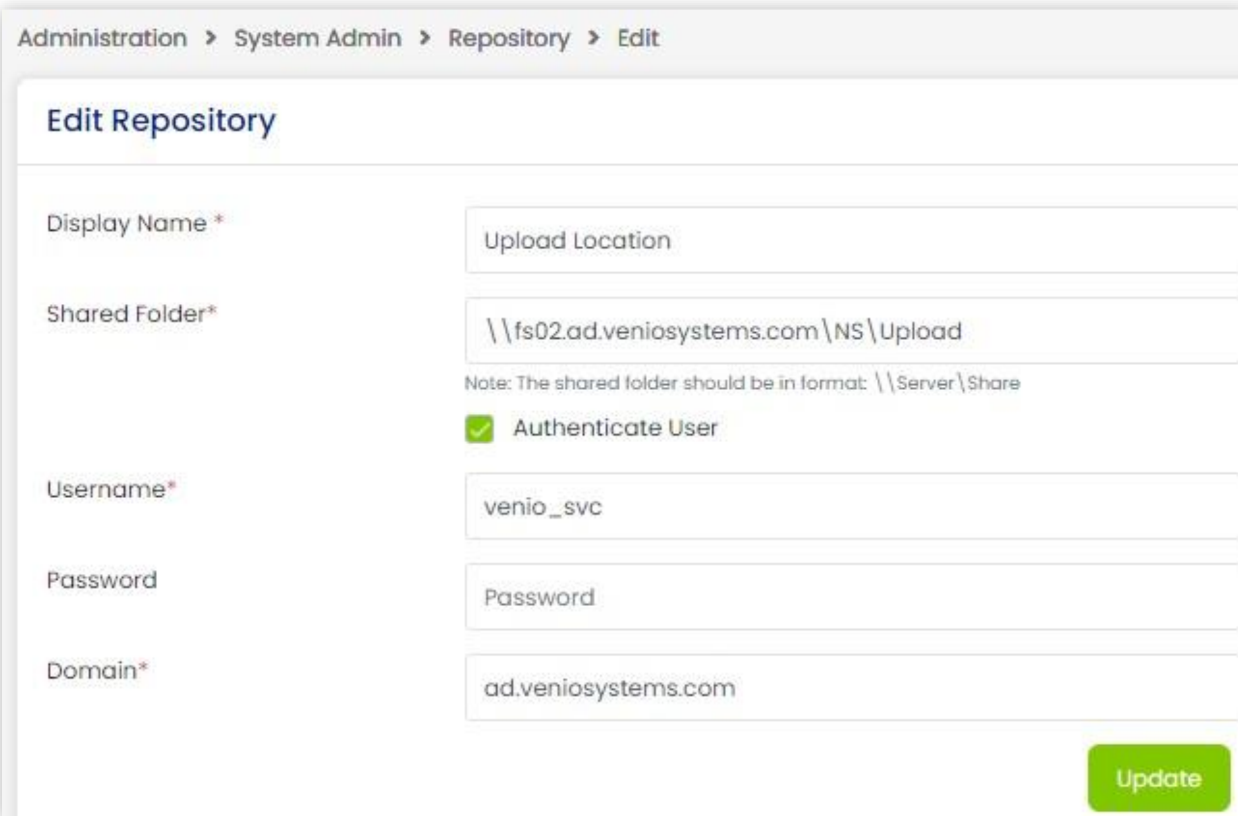
The Manage Repository dialog will be displayed.



Note : Upload option will not be available for Project and Export locations.

11.14.2.1 Edit Repository

Click the Edit icon adjacent to the repository you wish to edit.

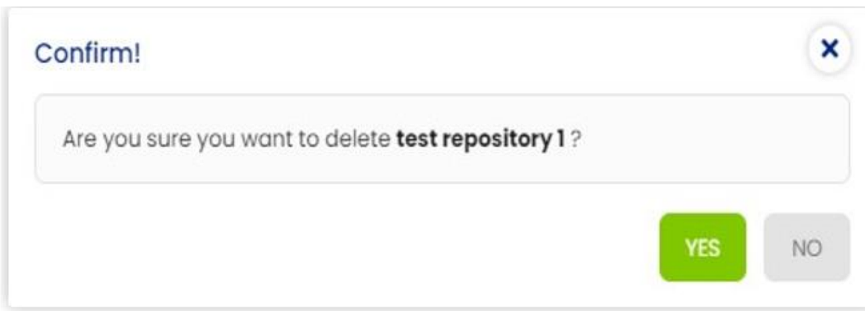


Make the changes in the screen and click Update. The changes are updated successfully.

11.14.2.2 Delete Repository

Click Delete icon adjacent to the repository you wish to delete.

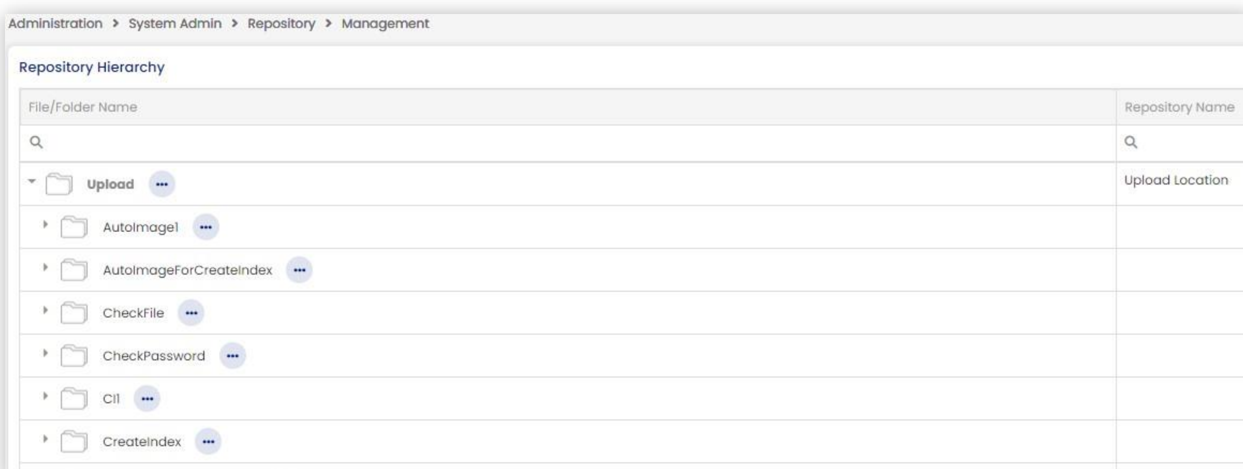
The Delete confirmation message will be displayed.



11.14.2.3 Upload Repository

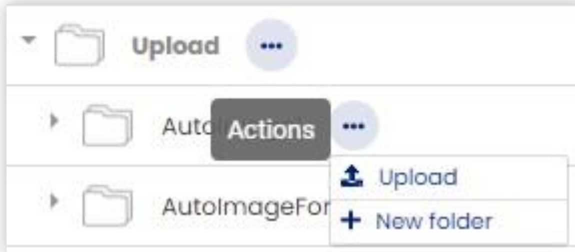
Click the Upload icon adjacent to the repository to view the Repository Hierarchy.

The Repository Hierarchy dialog will be displayed.



Note : Upload repository is hidden when Venio Web Export Service is not running.

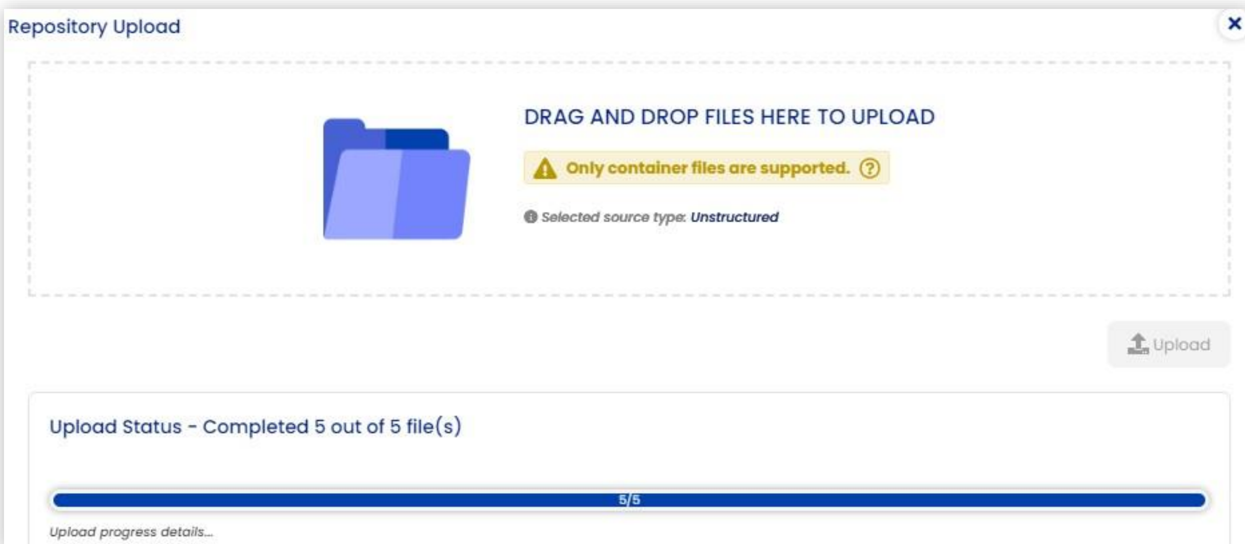
2. Click on the Actions button, options for Upload and New Folder are available.



i. Upload:

Click the Upload option to upload to the repository location.

The Repository Upload dialog will be displayed.



[For more details on upload, refer to section 5.3]

ii. New folder :

Click the New folder option to create a new folder in the selected repository location.

The Create New Folder dialog will be displayed.

Enter the folder name and click on Create.

A new folder is created

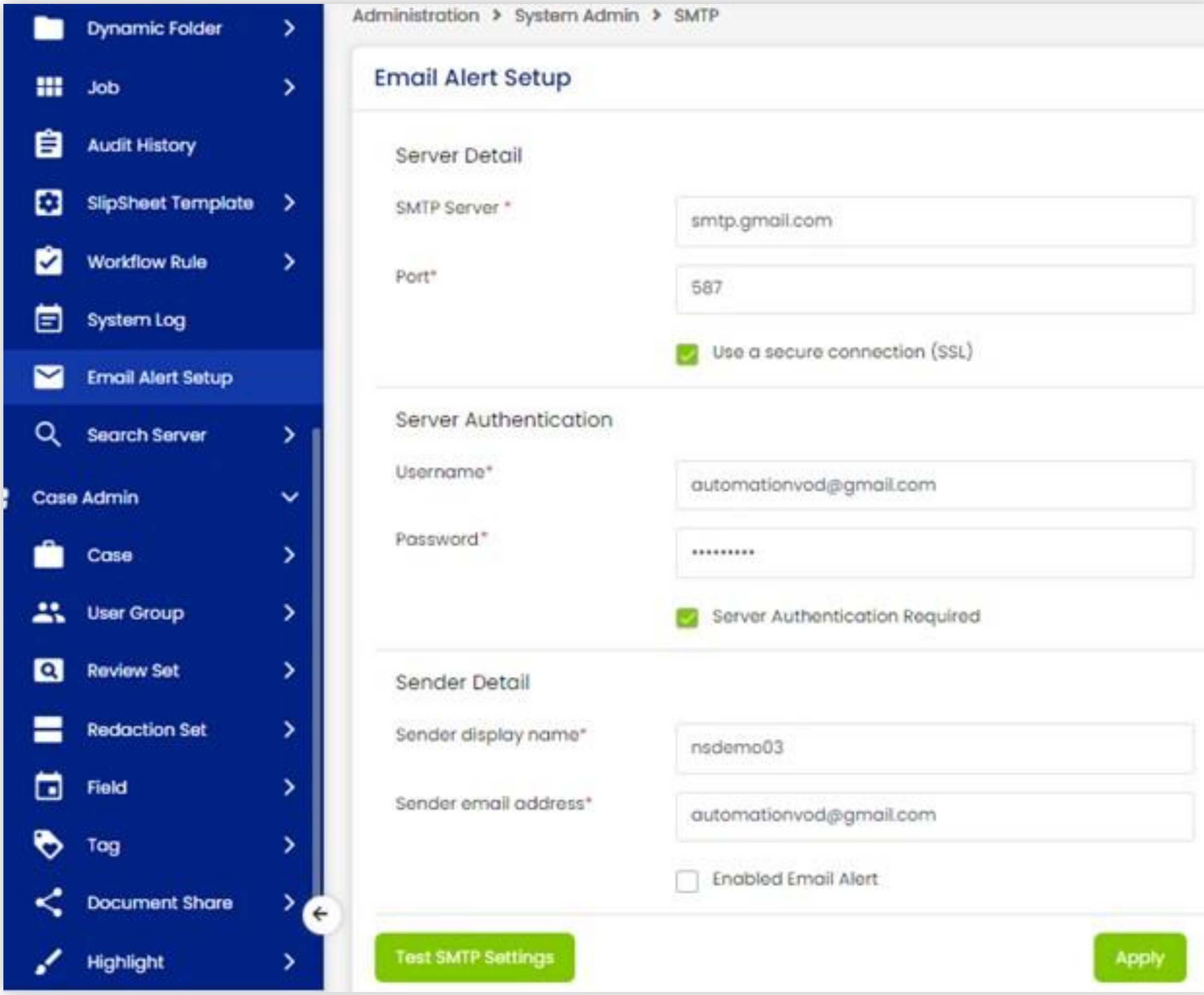
11.15 Email Alert Setup

Email Alert Setup configures the server setup that controls circulating emails to the designated recipients after the ingestion process is completed. You can setup/modify the SMTP Server and Sender configuration in the Email Alert Setup tab in the Admin Settings.
To configure email alerts, follow the steps given below.

Click the drop-down arrow next to your name in the top right corner.

Click Admin Settings > System Admin > Email Alert Setup.

The Email Alert Setup tab will be displayed.



11.15.1 Server Detail

Enter company's SMTP server name in the SMTP Server field.

7. Enter the port being used by your SMTP server in the Port field.

Select Use a secure connection (SSL) checkbox if your company uses an SSL connection.

11.15.2 Server Authentication

7. Enter the name used to authenticate to your SMTP server in the Username field.

8. Enter the password used to authenticate to your SMTP server in the Password field.

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- Select the Server Authentication Required checkbox if your company requires server authentication.

11.15.3 Sender Detail

10. Enter the sender's name who will be sending out the email in the Sender Display Name field.

11. Enter the sender's email address in the Sender's Email Address field.

12. Click Test SMTP Settings.

    VenioOne will test the configuration and validate the settings.

13. Select Enabled Email Alert checkbox to send email alerts.

14. Click Apply.

11.16 Database Server

11.16.1 Configuring Database Server

The database server configuration in VenioOne involves setting up of SQL connections and SQL database project locations.

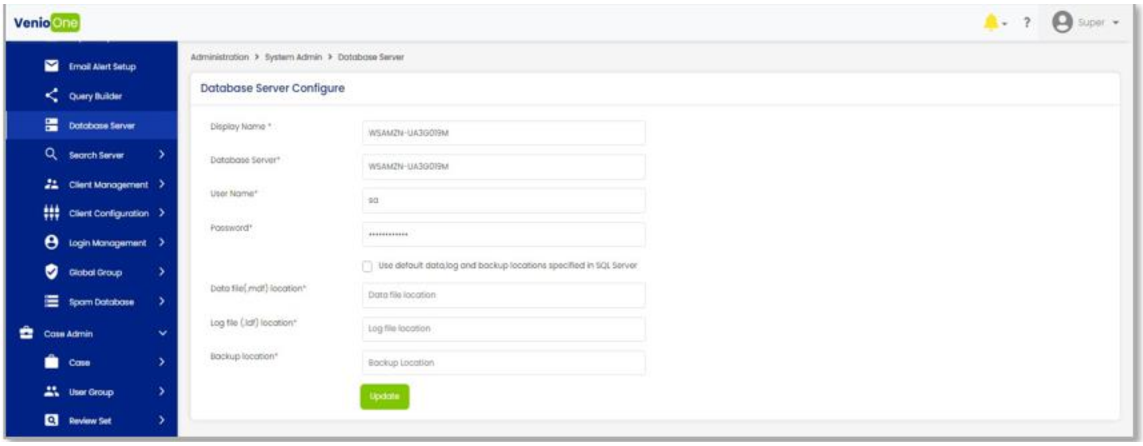
Note: Create and use a SQL user account with Admin permissions to connect to SQL prior to configuring the Database Setup. (Windows Authentication is not recommended. Do not use this option.)

To configure the database server, follow the steps given below.

1. Click the drop-down arrow ▼ next to your name in the top right corner.
2. Click Admin Settings > System Admin > Database Server.

   The Database Server Configure screen appears.

3. From the Database Server Configure page, enter the name of the server in the Display Name field.



4. The server name is available by default in the Database Server field.
5. Enter the username in the User Name field.
6. Enter the password in the Password field.
7. Select the Use default data and backup locations specified in SQL server checkbox to configure all three database locations in the default locations or unselect the option to specify those locations explicitly.
8. Click Update.

11.17 Search Server

VenioOne utilizes multiple servers to execute various search requests. With distributed search, VenioOne expedites search results by adding additional search servers.

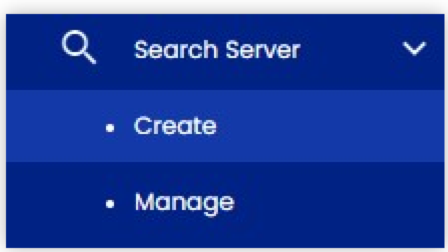
To configure the search server, follow the steps given below.

Click the drop-down arrow next to your name in the top right corner.

Click Admin Settings > System Admin > Search Server

The Create Search Server tab will be displayed.

There are two options for Create and Manage:

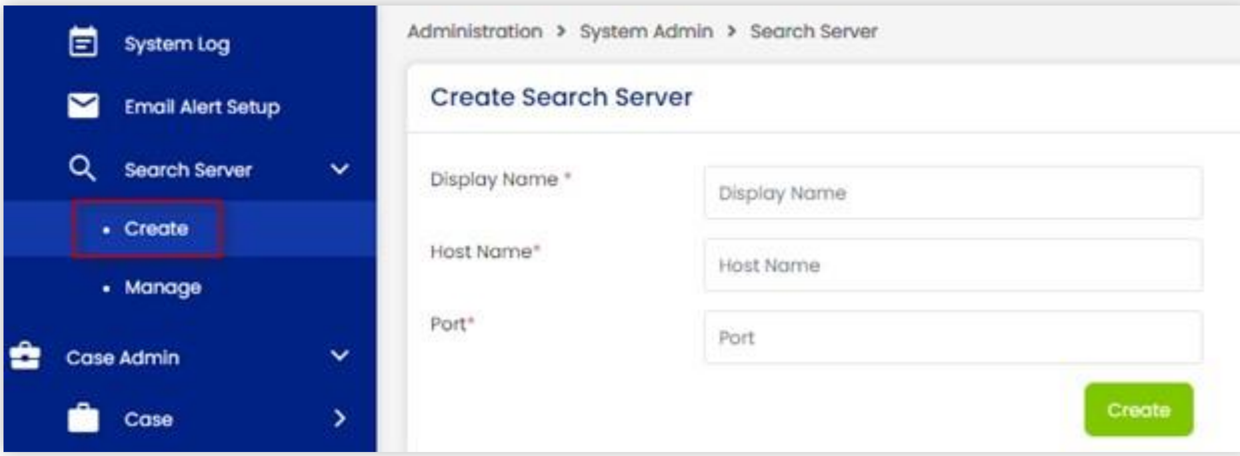


11.17.1 Adding a Server

To add a search server, follow the steps given below.

Click Create under Search Server.

Create Search Server section will be displayed.



Enter server name in the Display Name field.

Enter the name of the server that has the Search Service configured in the Host Name field.

Enter the port number in the Port field.

NOTE: Port number is the number that VenioOne uses to communicate with the Search Service. The default port for the Search Service is Port 8090.
Make sure the VenioOne Search Service has been started and configured on the server prior to adding it here.
Click Create. The system will test the connection to the selected server. If this server does not exist, or the host name is not recognized, a notification cautioning you about making the correct configuration, will be displayed.

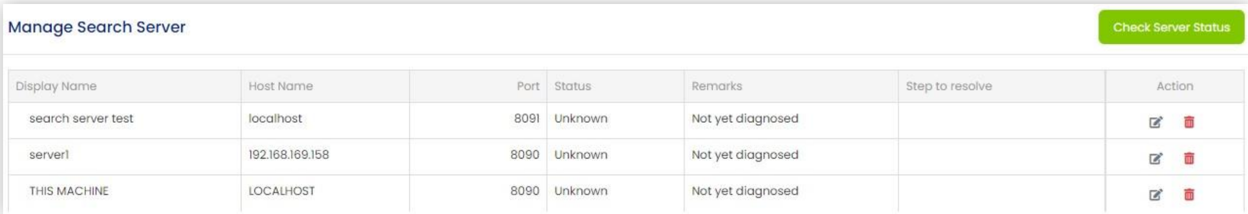
Check the server settings. If the connection is successful, the confirmation notification will be displayed, and a new search server will be added successfully.

11.17.2 Updating Search Server

To update an existing search server, follow the steps given below.

Click Create under Search Server.

Manage Search Server section will be displayed.

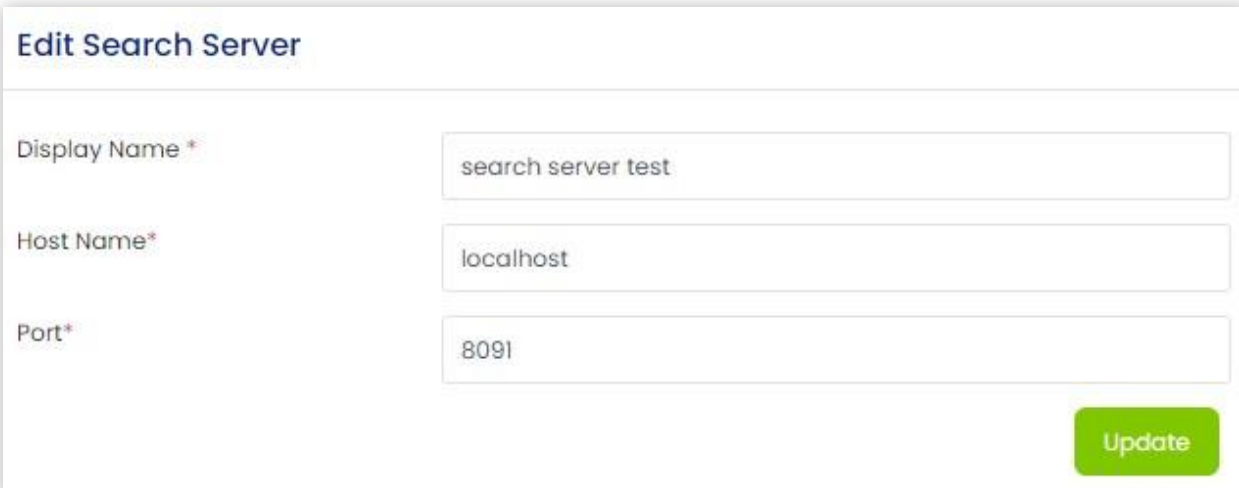

Manage Search Server

Check Server Status

Display Name	Host Name	Port	Status	Remarks	Step to resolve	Action
search server test	localhost	8091	Unknown	Not yet diagnosed		
server1	192.168.169.158	8090	Unknown	Not yet diagnosed		
THIS MACHINE	LOCALHOST	8090	Unknown	Not yet diagnosed		

Click on the edit icon under Action corresponding to the server name that you wish to edit.

Edit Search Server dialog will be displayed.

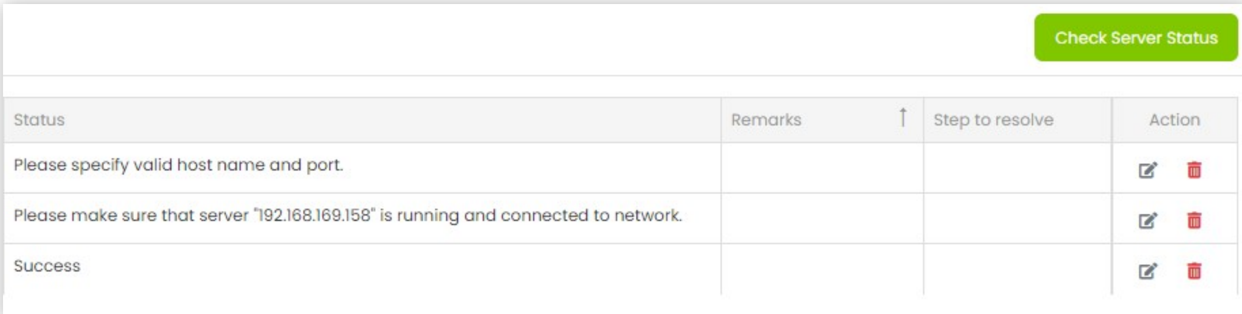


Make the desired changes and click Update.

The system will check connection with the server. A confirmation message that the changes made have been updated successfully will be displayed and the changes will be updated successfully.

4. Click on Check Server Status

The system will test the connection to the servers and display the status. If this server does not exist, or the host name is not recognized, remarks and steps to resolve the correct configuration will be displayed.



11.17.3 Deleting Search Server

To delete a search server, follow the steps given below.

Click Manage under Search Server.

Manage Search Server section will be displayed.

Click on the delete icon under Action corresponding to the server name that you wish to delete.

Note: If a Search Server is associated with a project, it cannot be deleted. You must make changes in the SQL database before you can delete. Please contact VenioOne support for assistance.
If the service server is not associated with any project, a message asking you to confirm the deletion of the search server will be displayed.

Click Yes.

A notification that the selected server has been deleted successfully will be displayed.

The selected server is deleted successfully.

11.18 Client Management

The Client Management module allows you to add, edit, and manage clients in VenioOne. It enables you to provide client details, set the upload, project, and export repositories, as well as templates for OnDemand users.

You can accomplish the following tasks from The Client Management:

- Add new clients.
- Edit existing clients.
- Assign upload, project, and export repositories for OnDemand clients.

- Assign project, export, and export field templates for OnDemand clients.

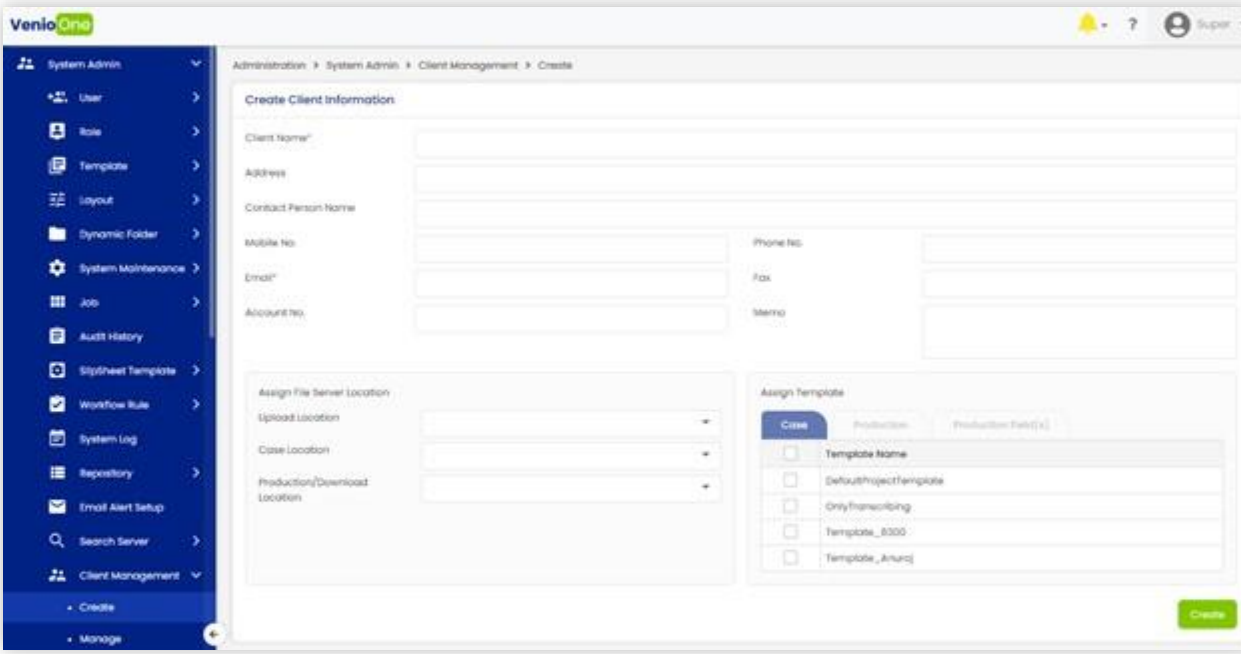
11.18.1 Creating Clients

To create a client, follow the steps given below:

Click the drop-down arrow next to your name in the top right corner.

Click Admin Settings > System Admin > Client Management > Create

The Client Information dialog will be displayed.



Enter the name of the client in the Client Name field.

Enter the email address of the client in the E-mail field.

Note: The other fields are optional, so complete the Contact Person Name, Mobile No, Account, Phone No, Fax, and Memo fields as per your requirements.

NOTE: The following fields are mandatory for creating a client for OnDemand use:

Select the upload repository in the Upload Location field.
Select the project repository in the Project Location field.
Select the export repository in the Export/Download Location field.
Select Third Party Billing to enable third-party billing.

NOTE: Templates are necessary for VenioOne OnDemand to function properly.

Select the project template(s) in the Project template field.
Select the export template(s) in the Export template field.
Select the export field templates in the Export Field(s) template field.

The Export Field Template available are:

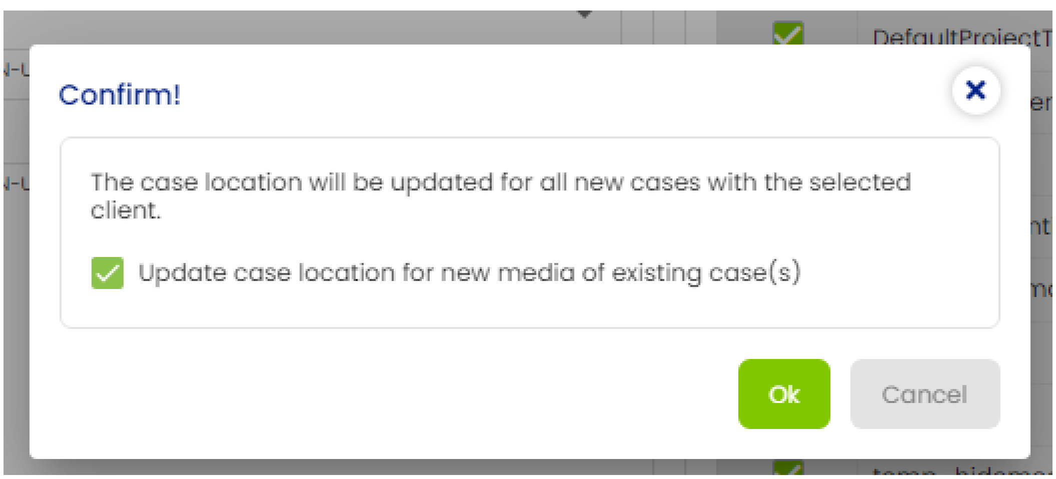
- All Venio Fields
- Venio Standards Fields
- SEC Fields
- FTC Fields
- DOJ Fields

NOTE: The default Venio templates are available as options for the OnDemand Project Template, OnDemand Export Template and Export Field Templates.

11.18.2 Update Case location.

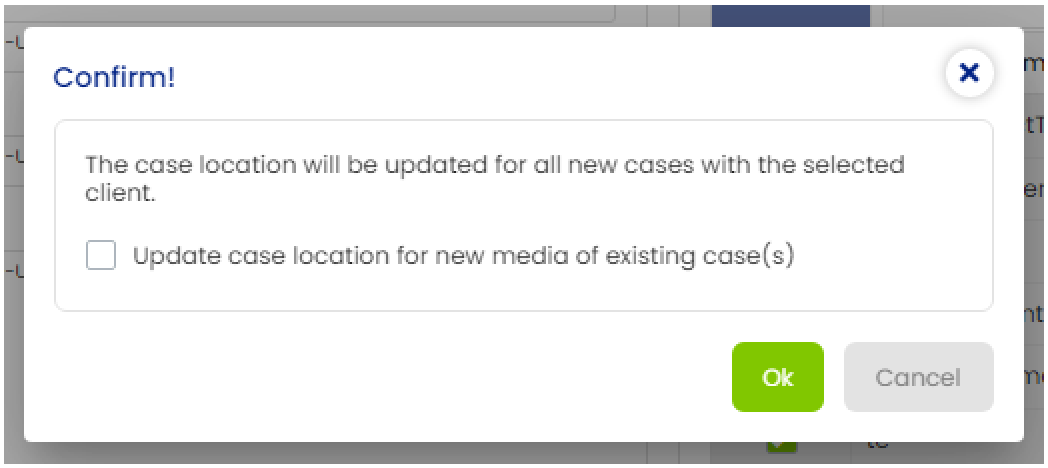
The application allows updating project locations for both new and existing projects.

To update the project location for existing projects, the "Update Case Location" checkbox should be checked. Once checked, the project location for all existing projects will be updated, and any new media files added to existing projects after the client update will be pointed towards the new project location.



To update the project location for new cases, the "Update Project Location" checkbox should be checked. All new projects added after the client update will have the updated project location.

If the "Update Project Location" checkbox is not checked, only new projects created after the client update will have the updated project location.



Please note that the project location for existing projects created before the client update will not change.

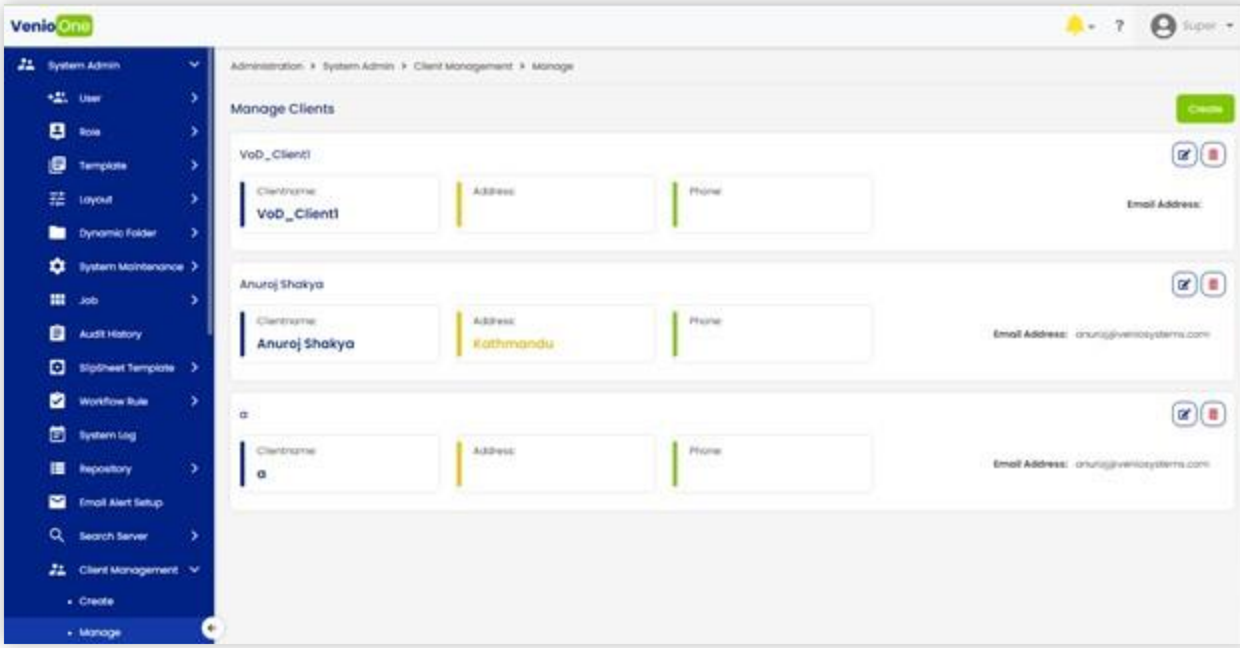
11.18.3 Editing Client

To edit an existing client, follow the steps given below.

Click the drop-down arrow next to your name in the top right corner.

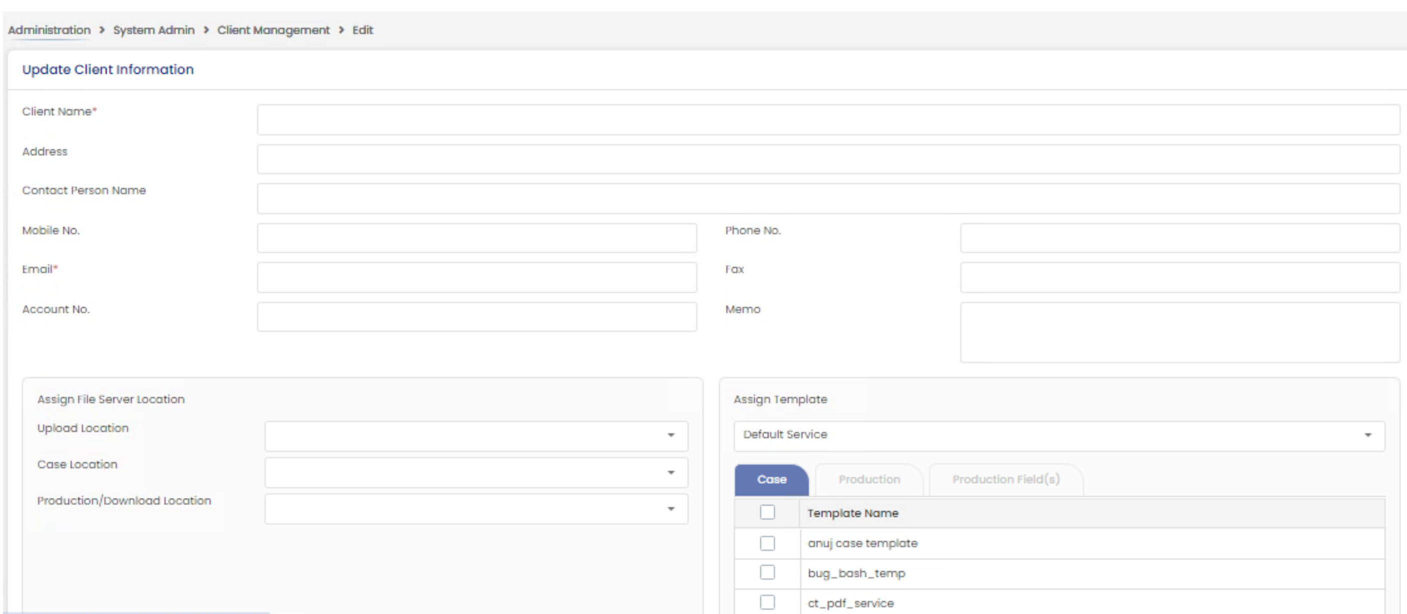
Click Admin Settings > System Admin > Client Management > Manage

The Manage Client page will be displayed.



Click on the edit icon to the client to be edited in the client list grid.

The client details are loaded in the Client Information dialog.



Under Assign Template dropdown, Default Service and PDF Service options are available. On selecting PDF Service, you must select same case template, production, and production field in both PDF Service as well as Default Service, and then click on Update. However, on selecting Default Service, you do not need to make changes in PDF Service.

Make the remaining desired changes and click Update.

11.18.4 Deleting Client

To delete an existing client, follow the steps given below.

Click the drop-down arrow next to your name in the top right corner.

Click Admin Settings > System Admin > Client Management > Manage

The Manage Client page will be displayed.

Click on the delete icon corresponding to the client you wish to delete in the client list grid.

The Confirm pop up will be displayed.

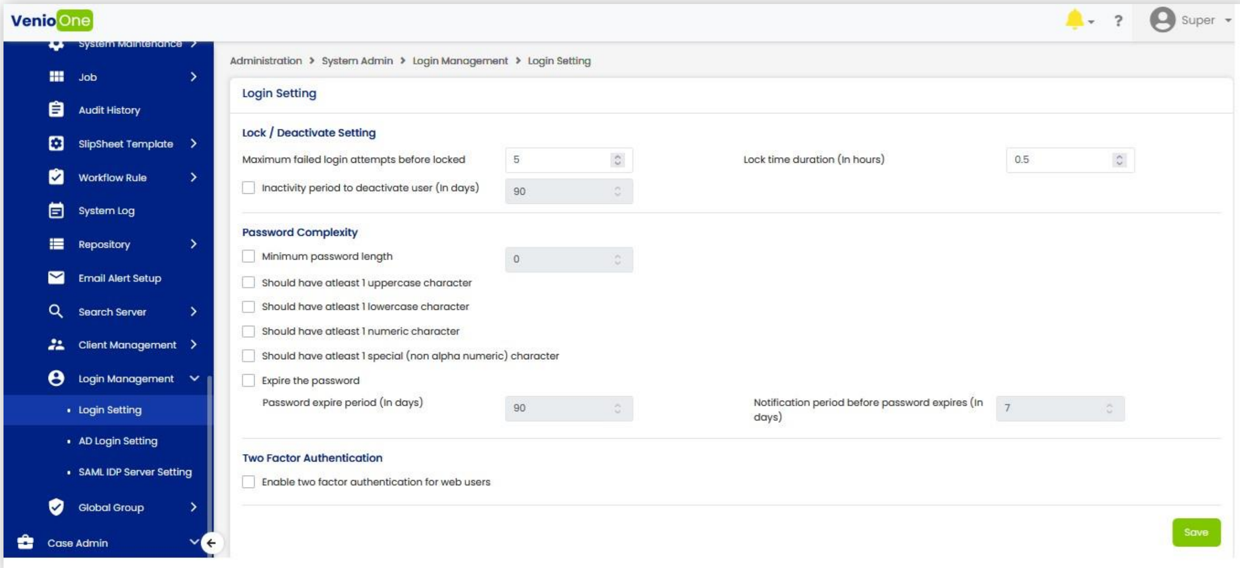
Click Yes to delete, No to cancel.

11.19 Login Management

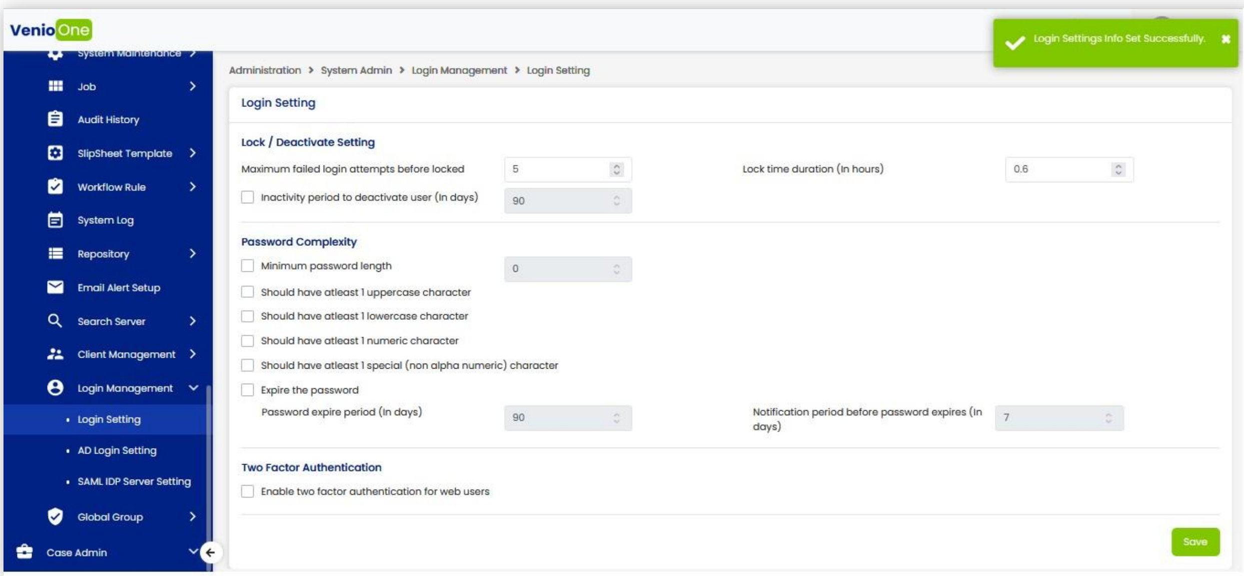
Login Management page helps you to handle all the login related settings and save them for later.

11.19.1 Login Settings

Navigate to Login Settings using Administration > System Admin > Login Management > Login Settings.

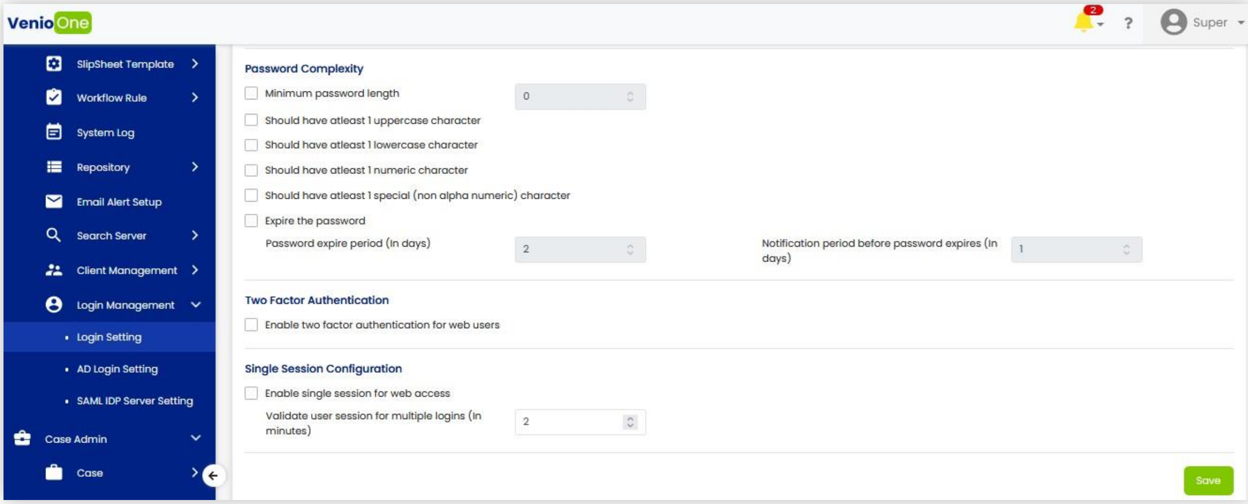


Make the necessary changes in the settings and click Save. The confirmation message appears:



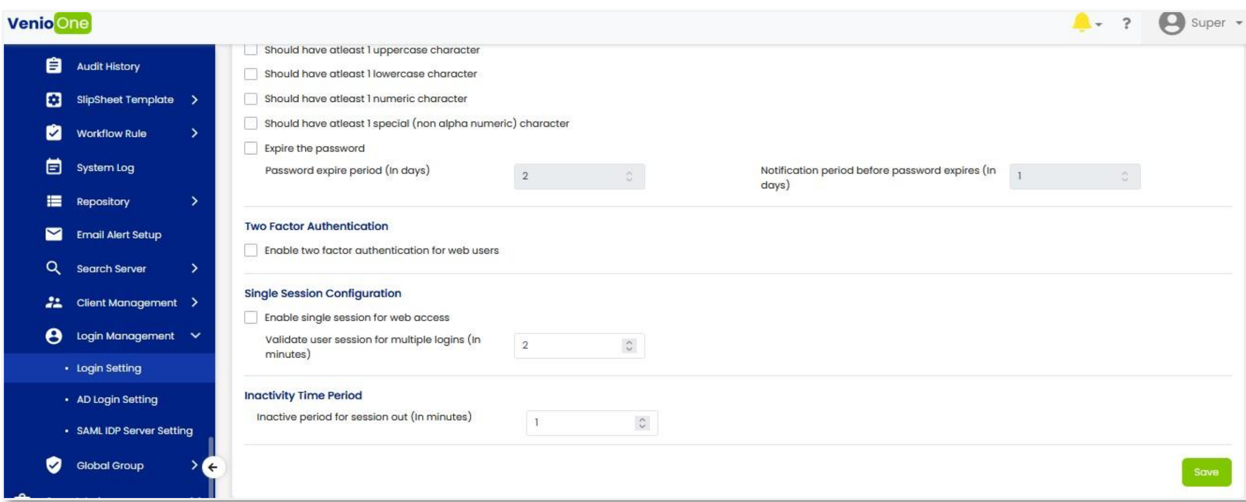
11.19.1.1 Single Session Configuration

This option enables you to enable sessions for web access for a specified duration of time from the Login Settings page. To set up the Single Session Configuration, select the checkbox for Enable single session for web access and set a time in minutes in the Validate user session for multiple logins (in minutes) and click Save.



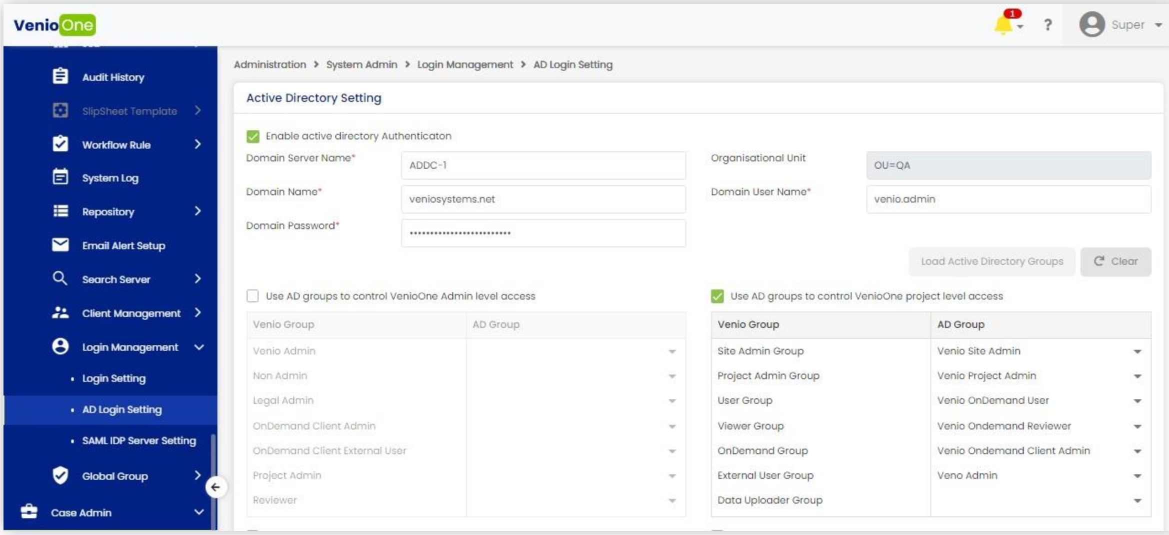
11.19.1.2 Inactivity Time Period

Inactive time period can be set by site admin. The term Inactive for this feature is that the user has not interacted with VOD for more than the specified number if minutes under the Inactivity Time Period field. Inactive users are logged out automatically after a configured amount of time set by the site admin. This Inactive period for session out (In minutes) can be configured via Administration > System Admin > Login Management > Login Settings > Inactivity Time Period.

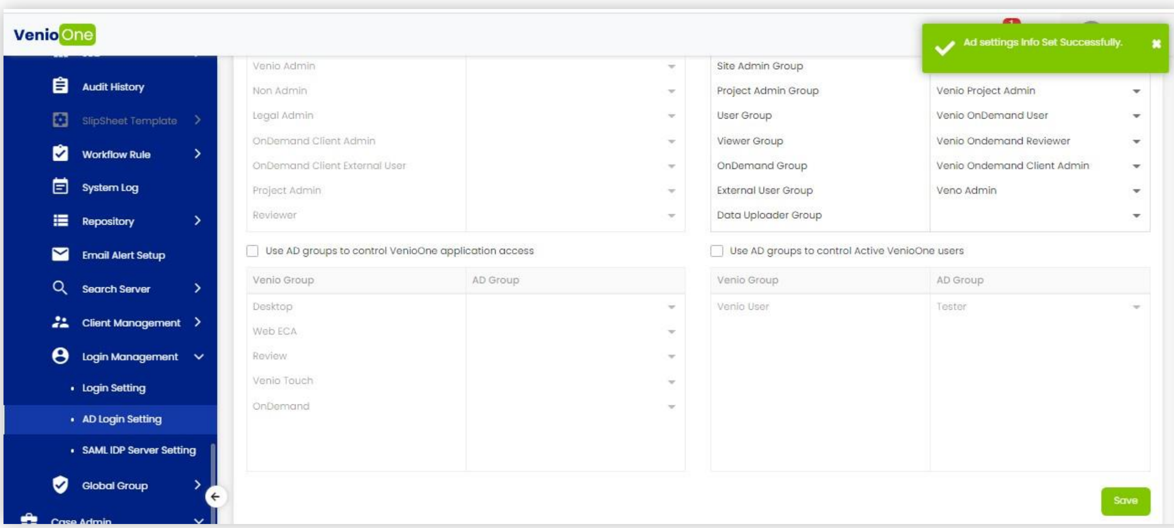


11.19.2 AD Login Setting

AD Login Settings screen enable you to manage the active directory related login settings. Navigate to AD Login Settings using Administration > System Admin > Login Management > AD Login Settings.

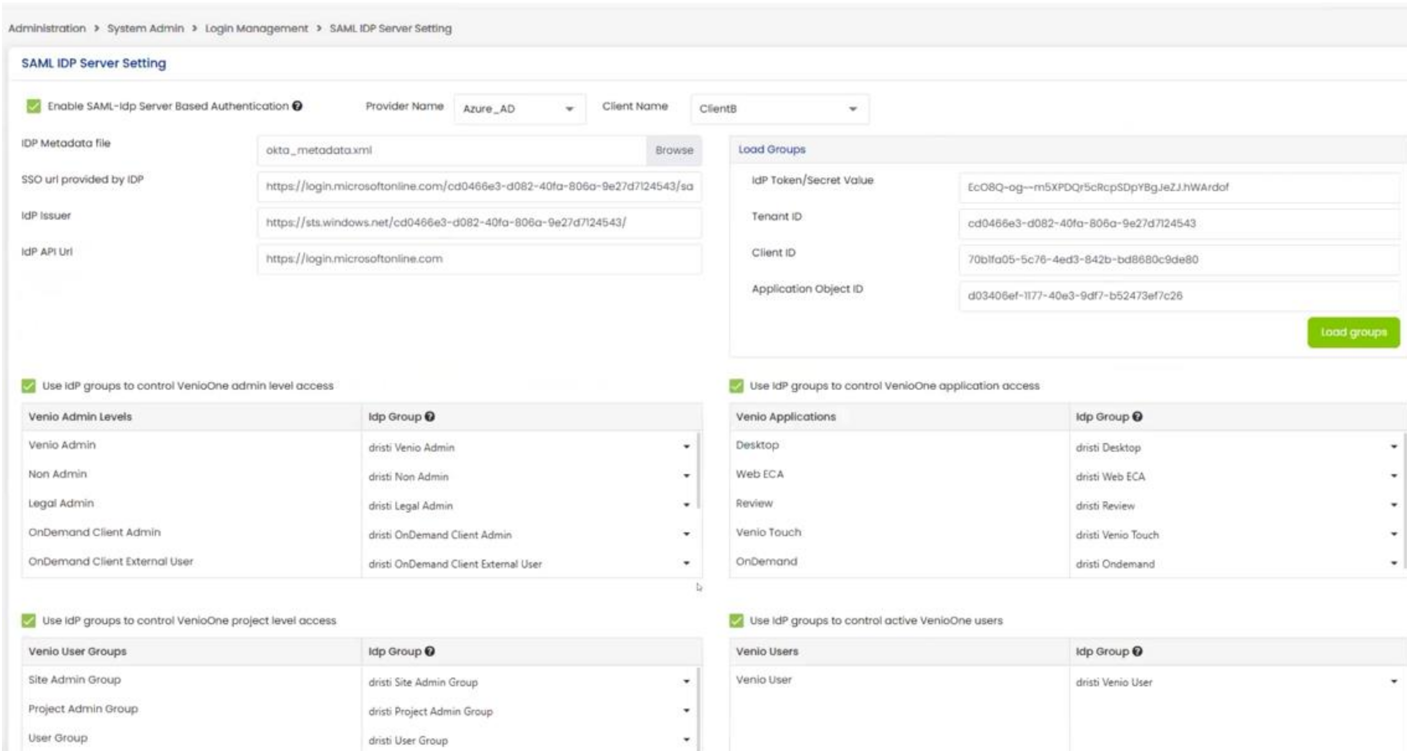


Make the necessary changes in the settings and click Save. The confirmation message appears:



11.19.3 SAML IDP Server Settings

SAML IDP Server Settings screen enable you to manage the SAML IDP related login settings. Navigate to 11.17.3 SAML IDP Server Settings using Administration > System Admin > Login Management > SAML IDP Server Settings. You can map Azure AD or Okta as Providers.

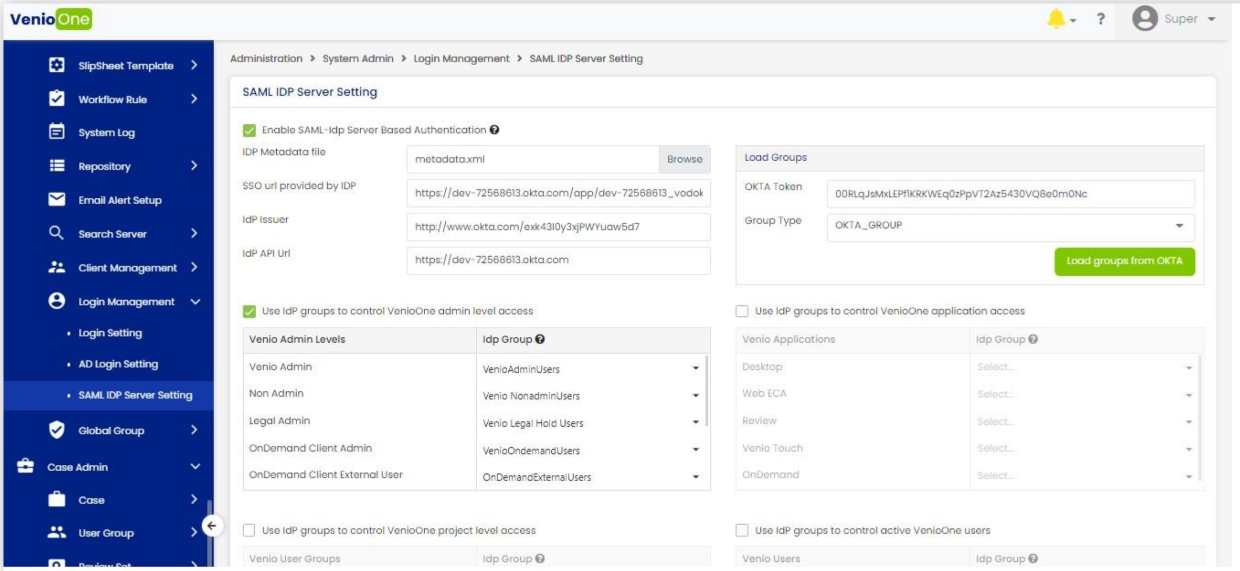


To map user groups for provider OKTA:

1. Login as Super Admin and navigate to Administration > Admin Settings > Login Management > SAML IDP Server Setting.

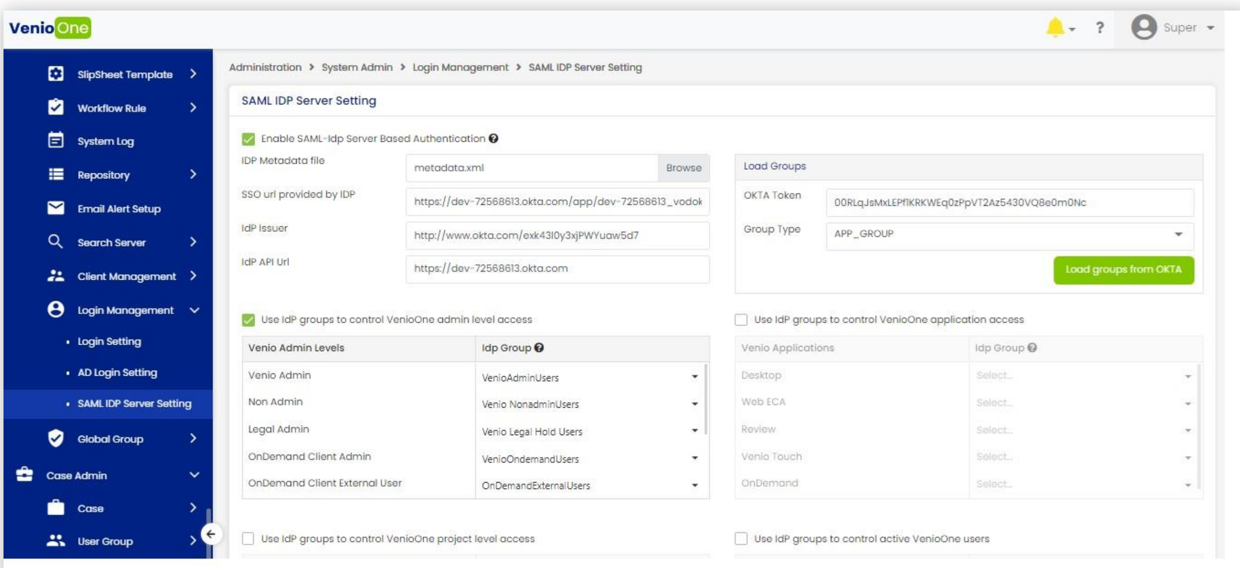
   The SAML IDP Server Setting screen appears.

2. Select the checkbox Enable SAML-Idp Server Based Authentication to enable the authentication.
3. Browse the OKTA metadata file to load IDP server specific meta info by clicking the Browse adjacent to the IDP Metadata file field.

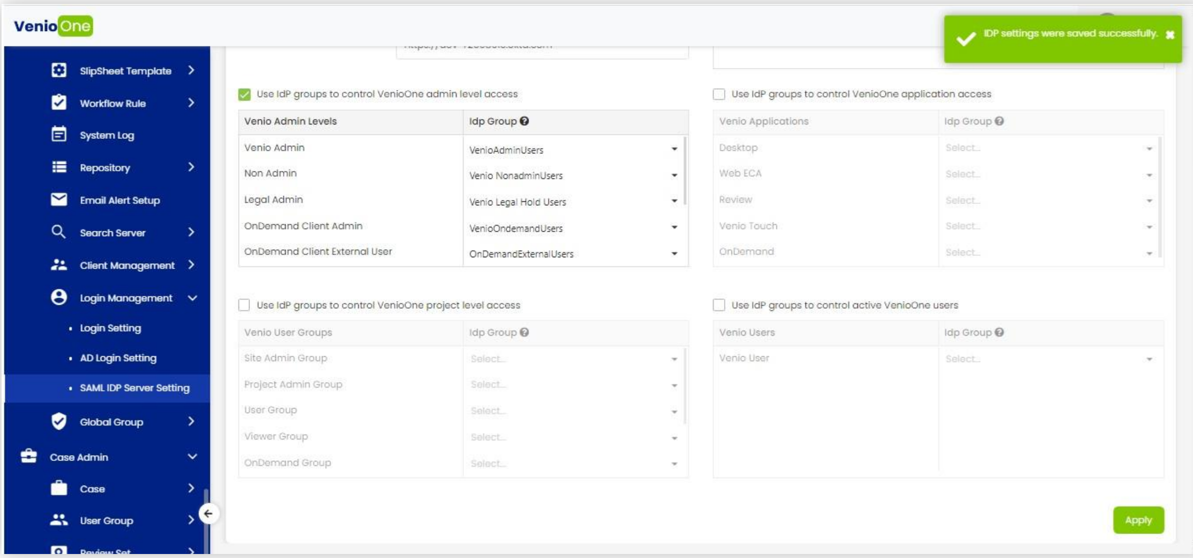


5. From the Load Groups section, select Group Type and enter the OKTA token 6. Click Load Groups from OKTA.

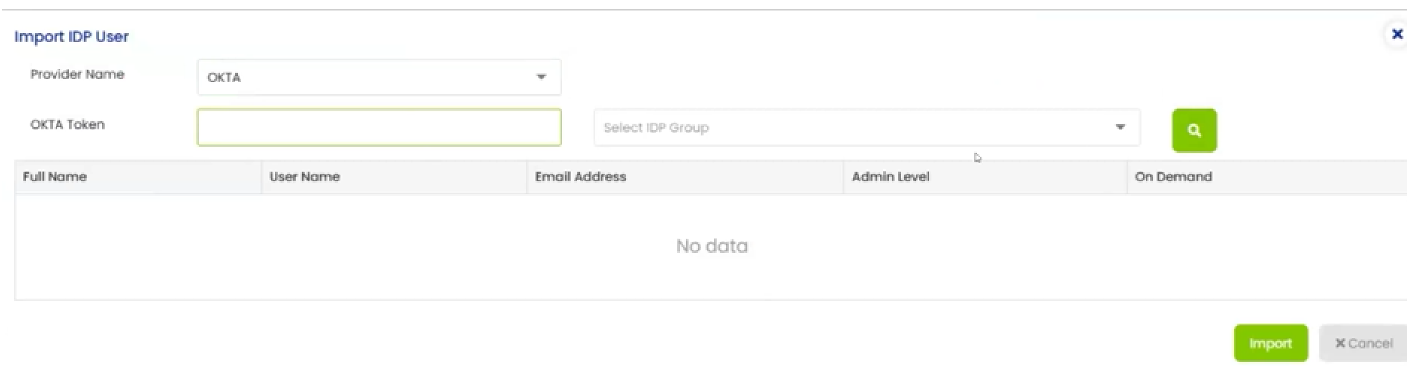
The Venio Admin Levels and the corresponding Idp groups are displayed.



7. Match the Venio Admin Levels with the corresponding Idp Group by making appropriate selections from the drop-down menu.
8. Click Apply. The success message appears as shown:

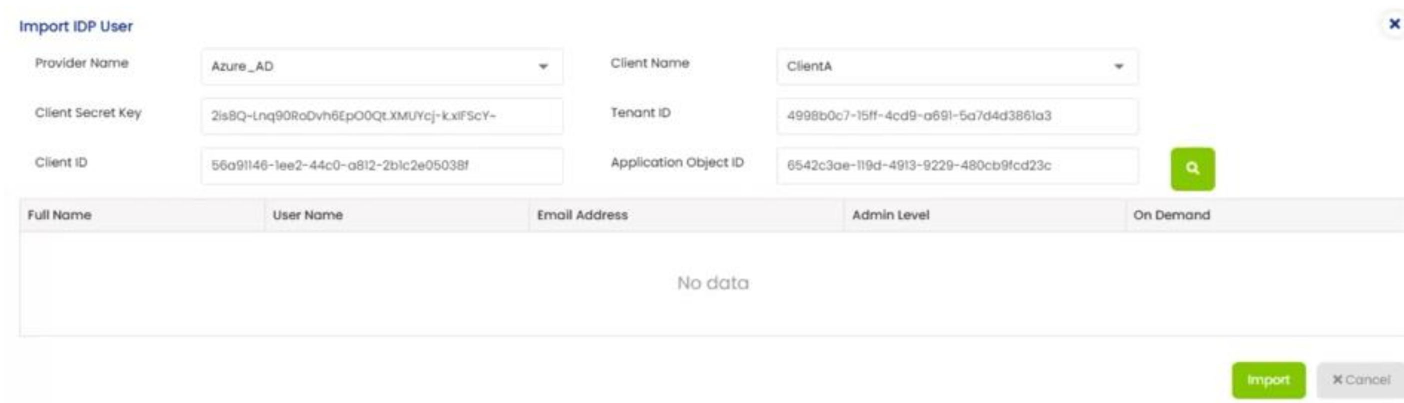


If you navigate to System Admin → User → Create → Import User from IDP for OKTA Provider, the following screen is displayed.

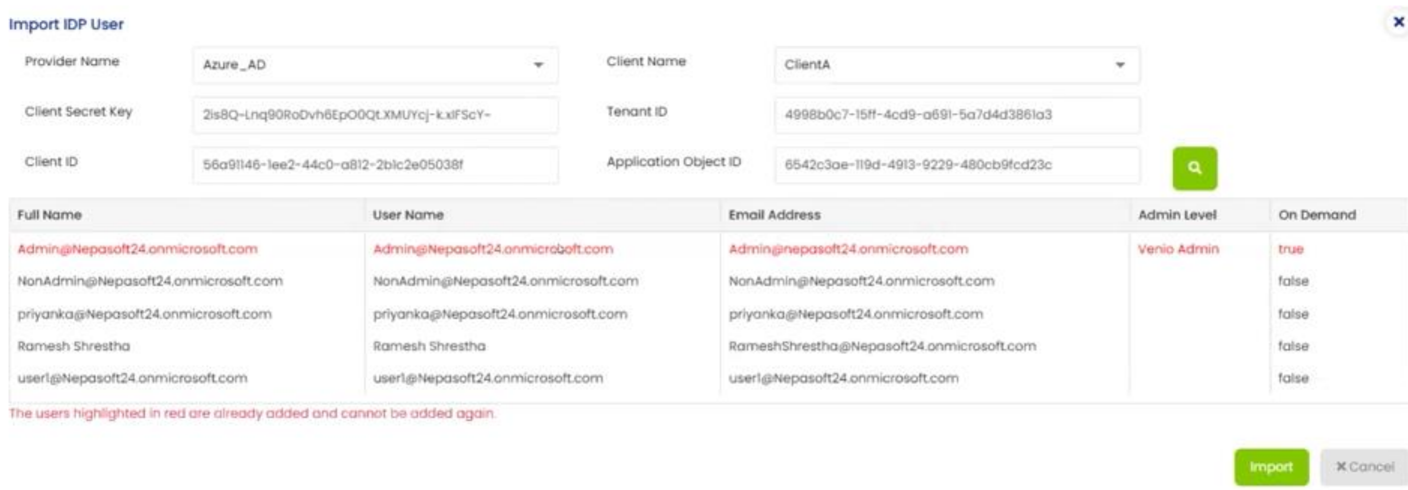


To map the groups for Provider Azure AD if the mapping is not done, navigate to System Admin → User → Create → Import User from IDP.

Venio



Select the Client Name and search for the users by clicking on search icon corresponding to Application Object ID. If you are logged in as client, the Client Name is disabled.



The red highlighted user means the user is already added. Select the User and click on Import. This will navigate you to Create User screen from where you can create the user.

11.20 Global Group

Global group allows you to manage the rights and fields of groups.

11.20.1 Manage Rights

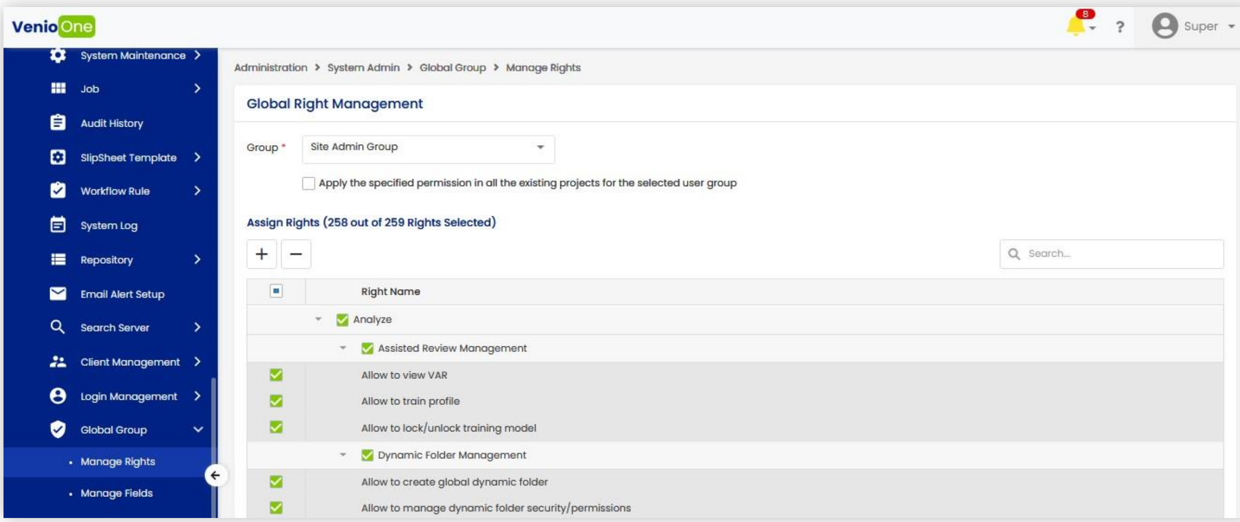
Global Right Management page displays all the rights assigned to different user groups. Group drop down menu displays all the user groups available.

You can search for the user group by the Group Name and assign the rights accordingly. Based on the group selected from the Group drop down the number of rights for the group are displayed.

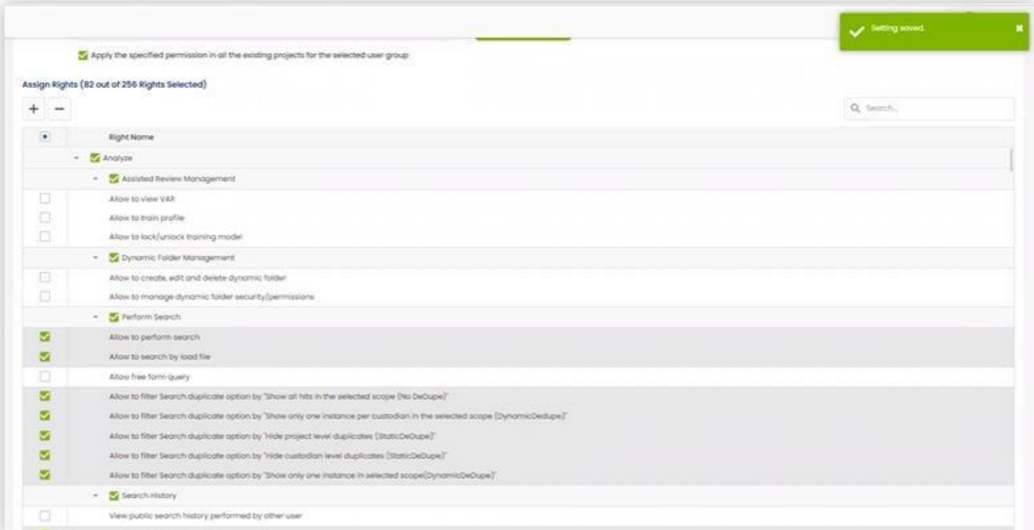
To assign rights to group:

1. Navigate to System Admin > Global Group > Manage Rights.

   The Global Right Management page appears.



2. Select the group you wish to assign rights from the Group drop-down. The corresponding rights appear in the Assign Rights section below.
3. Select the rights you wish to apply by selecting the checkbox.
4. Click Apply. A success message appears.



You can also select the option to apply the specified changes in all the existing projects or any specified user group by selecting the checkbox.

11.20.2 Manage Fields

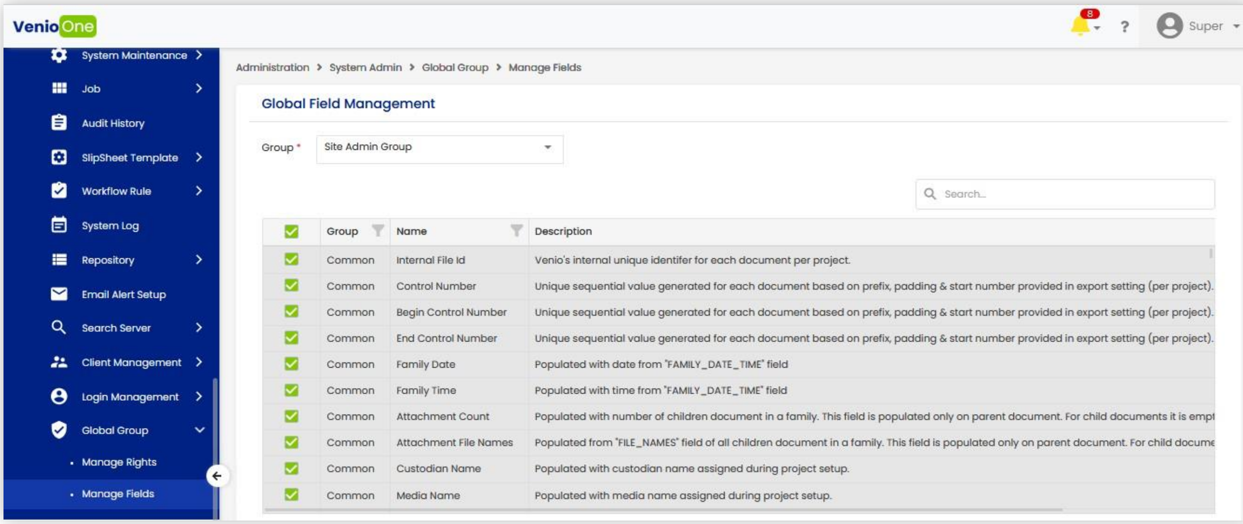
Global Field Management page displays all the fields that can be assigned to different user groups. Group drop down menu displays all the user groups available.

You can search for the user group by the Group Name and assign the fields accordingly. Based on the group selected from the Group drop down the fields applicable for the respective group are displayed.

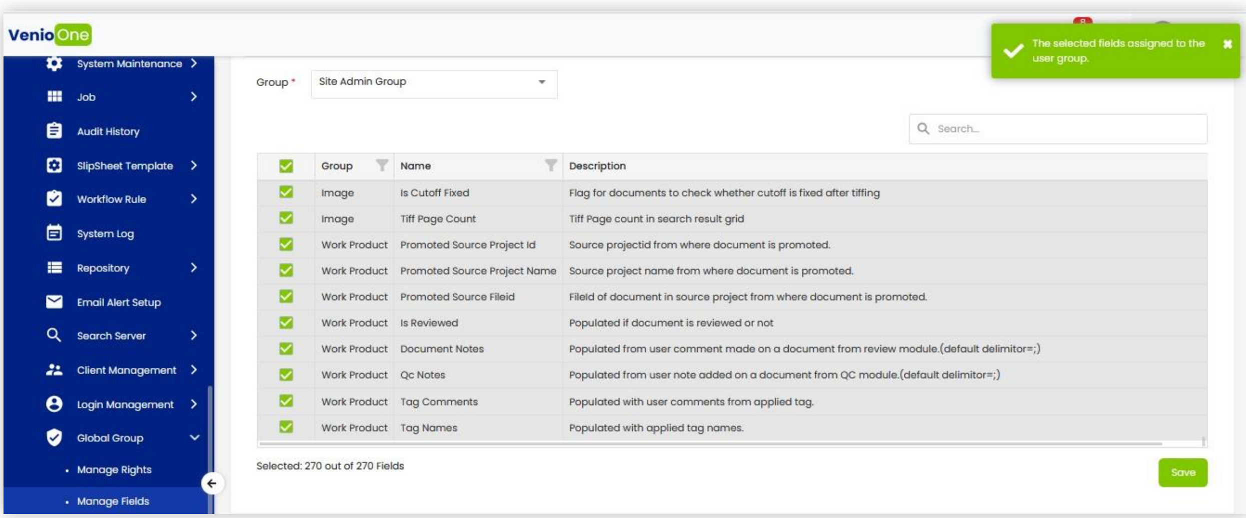
To assign fields to group:

1. Navigate to System Admin > Global Group > Manage Fields.

   The Global Field Management page appears.

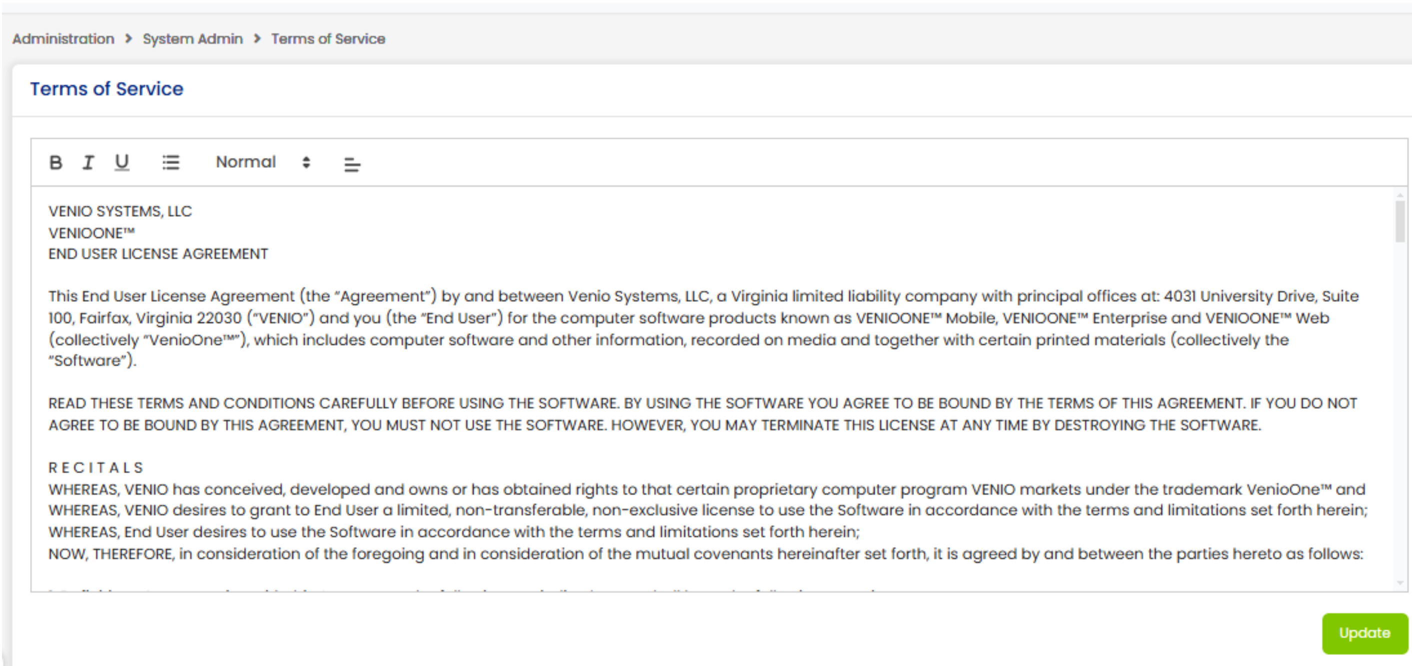


2. Select the group you wish to assign fields from the Group drop-down. The corresponding fields appears.
3. You can search for the fields using the Search option. Select the fields you wish to apply by selecting the checkbox.
4. Click Save. A success message appears.



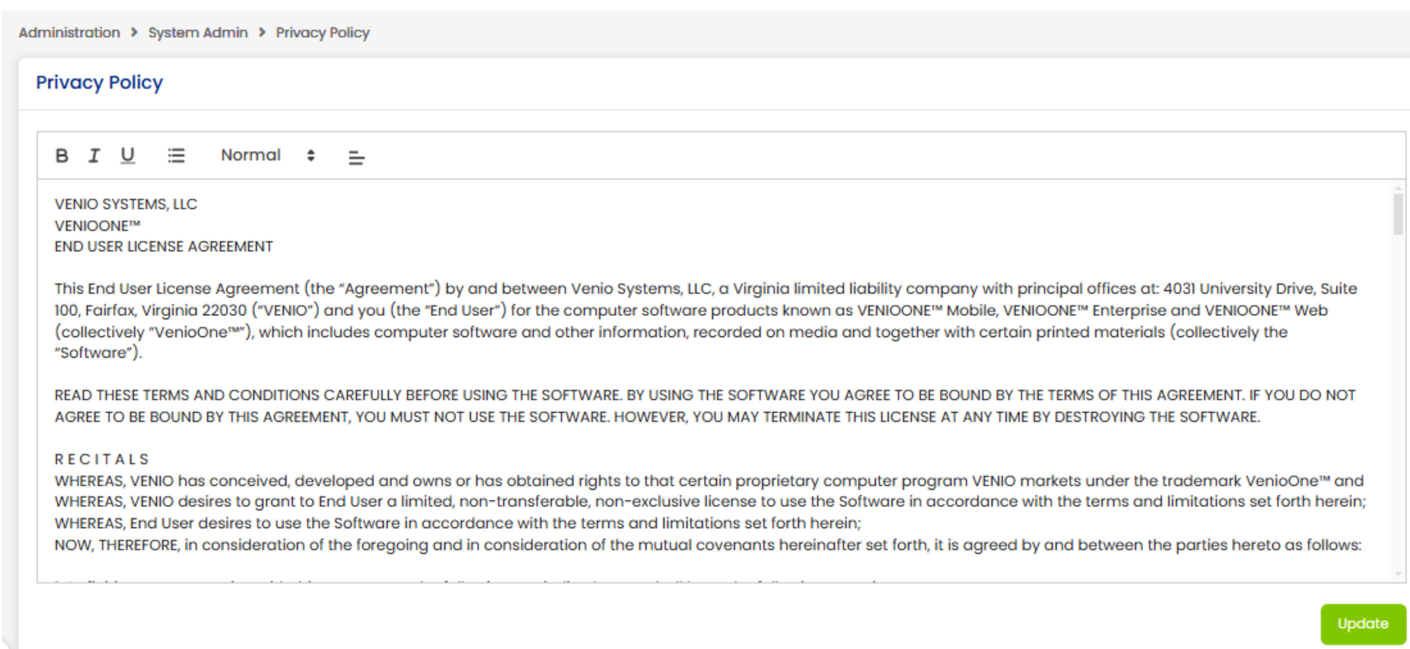
11.21 Terms of Service

If you have the Admin permission, you can change the Terms of Service by navigating to System Admin → Terms of Service, make the changes and click Update.



11.22 Privacy Policy

If you have the Admin permission, you can change the Privacy Policy by navigating to System Admin → Privacy Policy, make the changes and click Update.



Distributed Service Management

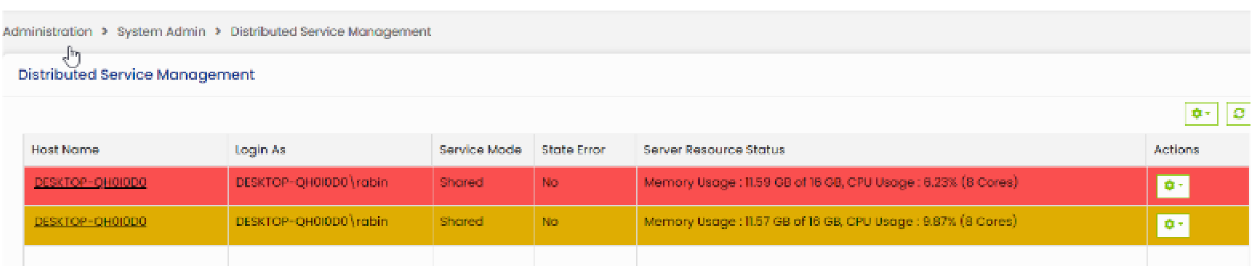
Criteria for access

1. must be the internal client user
2. should have the right **“Allow to manage distributed service”** (Venio Admin)
3. Control settings value for key **IS_CLOUD_ENVIRONMENT** (if present) should not be 1.

Navigation

Admin Settings > System Admin > Distributed Service

Server and plugin listing



Server details are listed in the grid and its state indicated by background color:
White: running with no errors.
Yellow: warning with no errors.
Red: stopped state or has errors.

Detail about the information displayed in the server row:

1. **Hostname**:
   Hostname of server hosting the DS.

0. **Login As**:
   User account used to log in for DS.

0. **Status**:
   Shows whether DS is running or stopped along with count of Job Types that have error or warnings (if any).

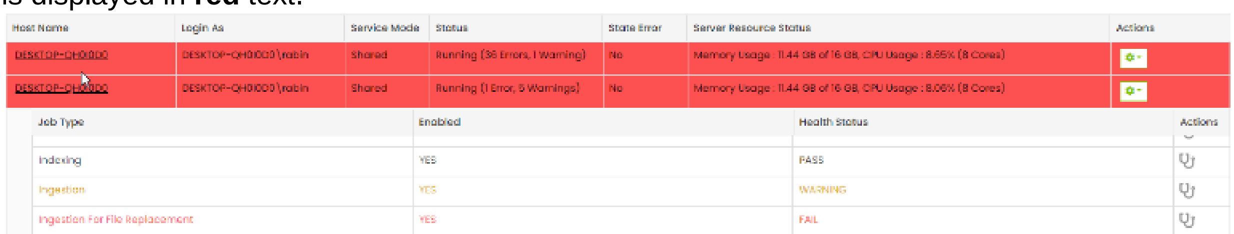
0. **State error**:
   Indicates if any job type has errors.

0. **Server Resource Status**:
   Shows used memory, total memory, cpu usage and core count.
0. **Service mode**:
   Shows whether DS is dedicated to certain projects or is shared for any projects.
   Dedicated: indicates that DS is dedicated to certain projects.
   Shared: indicates that DS is shared for both Console and Ondemand projects.
   Shared(Console Projects): indicates that DS is shared for Console projects.
   Shared(Ondemand Projects): indicates that DS is shared for OnDemand projects.
   (Realtime) is appended whenever “Process Real-Time Jobs” is enabled from server settings.

The server row can be expanded to show Job Types by clicking on the hostname if:

1. DS is in running state.
2. DS can be reached(no issues related to network/port configuration)

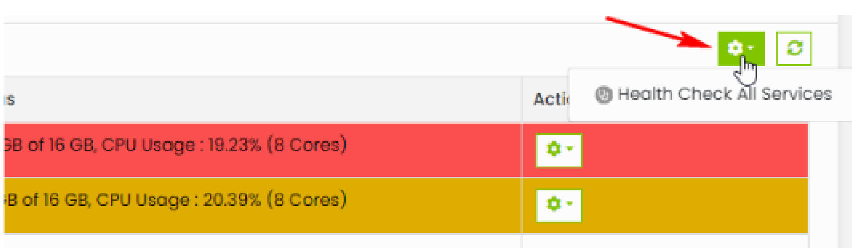
When expanded, the Job Types grid displays their Enabled and Health statuses. The text is shown in **yellow** if there are warnings and no errors for a particular Job Type. However, if there are any errors, the Job Type is displayed in **red** text.



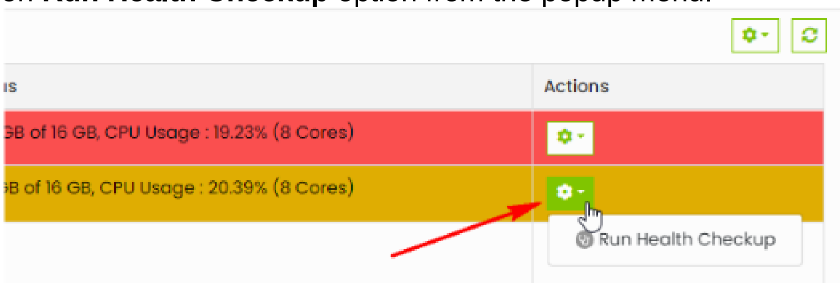
Health Checkup

When Distributed Service Management is initially loaded the health status shown by the color and Status column is based on previously run health checkup results. To get updated health status we can perform the health checkup manually from the Distributed Service Management page.

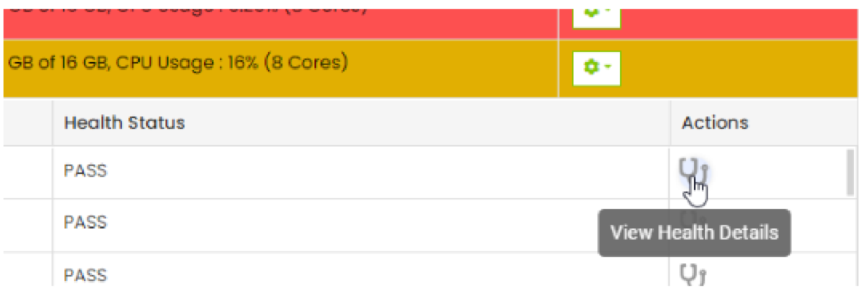
Health checkup on all servers: click on gear icon located above the grid and click on **Health Check All Services** option from the popup menu.



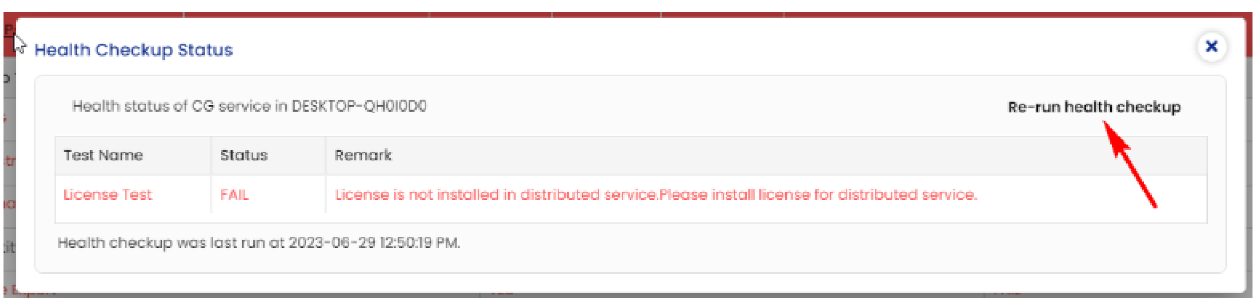
Health checkup on a single server: click on gear icon in the grid row of a particular running server and click on **Run Health Checkup** option from the popup menu.



When the grid row is expanded we can click on the stethoscope icon (View Health Details) located in the Action column of Job Type row to view health checkup details.



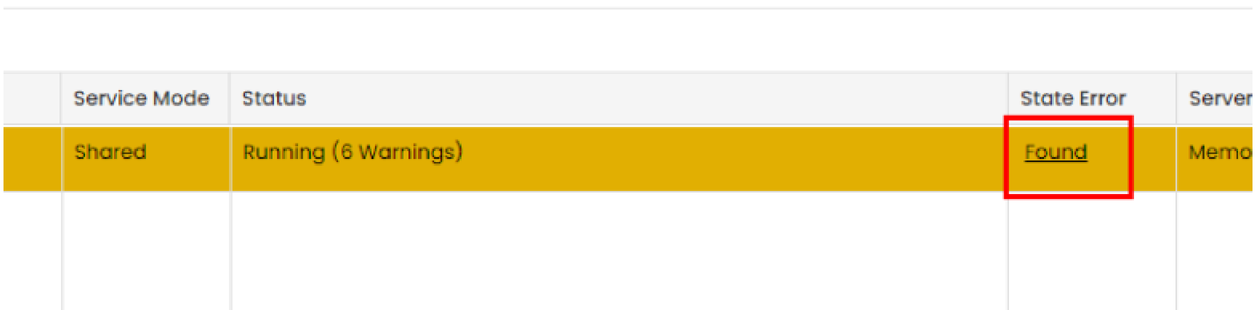
From the Health Checkup Status detail we can see the test results, status and remarks in the grid. We can also see the time the health checkup was last run on.
We can click on **Re-run health checkup** to rerun health checkup for a single Job Type.



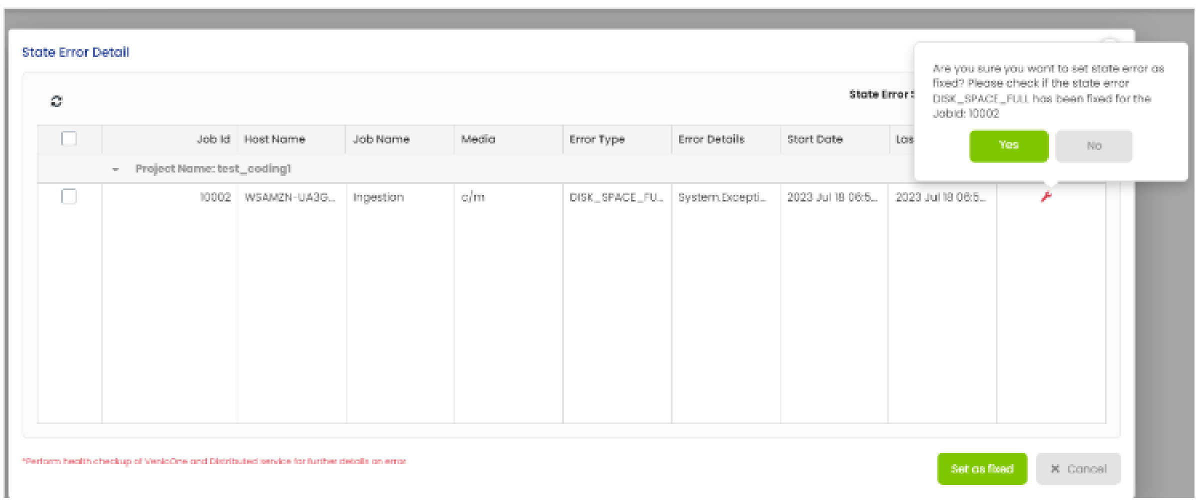
State Errors

Whenever there is a state error due to lack of disk space or inaccessible repository, the **State Error** column in the server listing will show a link with text "**Found**".
The state error will not be shown if:

1. the project having state error is archived (BackupStatus = 1), not updated (ProjectUpdatedVersion in tbl_pj_ProjectSetup), or is not accessible to the user (tbl_pj_UserProjectAssociation)
2. OnDemandFlag is not set for the client (tbl_pj_ClientInfo) that is related to the project with state error.



Upon clicking on that link the State Error Detail popup will be shown where users can view and set the error as fixed.



Edit Service settings

Service settings can be edited by clicking on the gear icon in the server detail grid row and selecting the Edit **Service Setting** option from the popup menu. The settings for service include following fields:
Temporary folder: Temp folder used by DS.
Service Port Number: Port used by distributed service for remote connection.
Maximum number of instances: field value set from **Service Settings** for DS.
Enable Debug Mode: Enable/Disable debugging.
Reboot server period in hour: Set rebooting time interval in hour.
Process Jobs From Projects Created In: Choose projects created from which projects to dedicate this DS server.
Process Real-Time Jobs: Enable/Disable processing real-time jobs.

Apply this to all services: If checked will apply settings to only the currently editing server, else will apply to all servers.

Edit Dedicated Projects

To configure dedicated projects, click on gear icon on the server row and select **Edit Dedicated Project** option from the popup menu.
Distributed Service can be configured to process only projects created from Console, Vod, or both. We can also dedicate DS to a few selected projects.

Edit Configuration Settings

To open configuration for a plugin(Job Type), click on the gear icon in the Job Type row and click on **Edit Settings** option from the popup menu**.** Each plugin can have its own set of settings to configure. Few common ones are **Enabled**, **Maximum Instance**, and **Default Batch Size**.

Active Jobs

To view active jobs, click on gear icon on the server row and select **View Active Jobs** option from the popup menu.

Remove DS server

To remove a distributed service, the service must be first stopped. The remove server option will not be visible if the distributed service is not in a stopped state. After confirmation, the distributed service will be removed and the license for distributed service will be removed as well. The distributed service will be re-added if the service is started again.

Start/Stop/Restart

-Display Stop if service is in Start state.

-Display Start if service is in stopped state.

-Display Restart if service is started but could not connect.

-Clicking these actions should do a respective action.

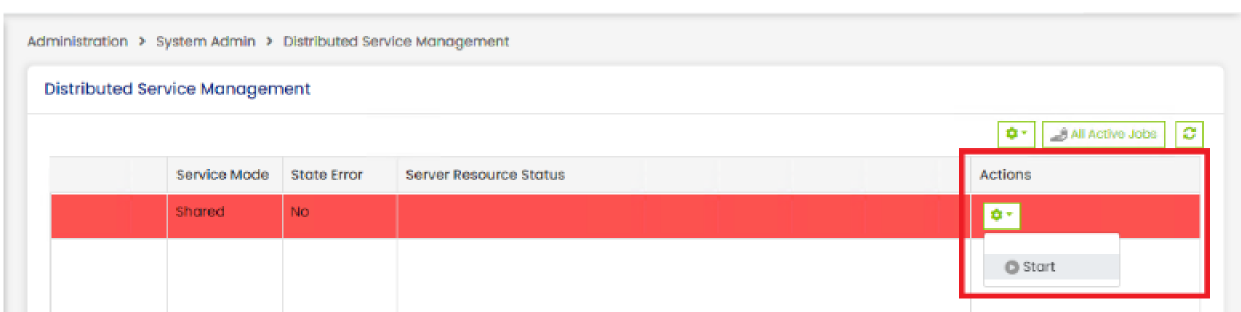
-When a user clicks these actions, api connects to the Venio monitor service of the respective distributed

service and sends a request to perform the action. Then the Venio monitor service performs the action.

-Since these actions are done through Venio monitor service. Venio monitor service should be installed where distributed service is installed.venio monitor service should be running all the time. To ensure that Venio monitor service is started when distributed service is started or stopped or in interval of distributed service health check (default 4 hr)

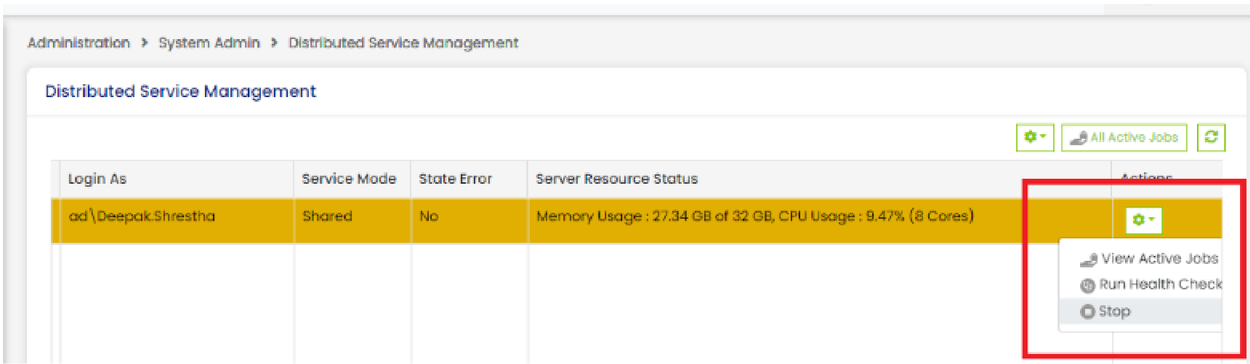
Start Distributed Service

If the distributed service is at a stop state, In the action column if we click on the setting icon, there is an option to start the distributed service. It will take time to start distributed service, so does not reflect status as soon as clicking. Need to refresh multiple times.(aprox 30 sec- 1 min)



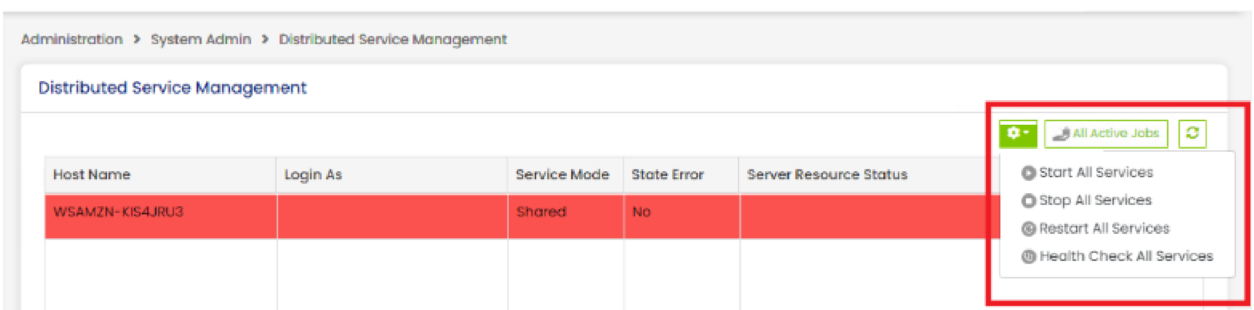
Stop Distributed Service

If the distributed service is at a start state, In the action column if we click on the setting icon, there is an option to stop the distributed service



Bulk Start/Stop/Restart Distributed Service

If the user wants to start or stop or restart all the services then click the setting icon on top right, there are all three actions. This will perform selected action for all the distributed services listed in UI. Start and Restart might take time to reflect in the UI.



Console's Distributed Service Manager:

The "Console's Distributed Service Manager" incorporates a feature that enables automated reboots of distributed service machines at designated time intervals, measured in hours (hr). By setting an interval, like 24 hr, the system will automatically initiate a reboot of the machine every 24 hours.

Here's how the feature operates:

Establishing the Reboot Interval: Through the "Console's Distributed Service Manager," one can specify a time interval in hours for automated reboots. For instance, opting for a 24-hour interval means that the machine will undergo an automated reboot every 24 hours.

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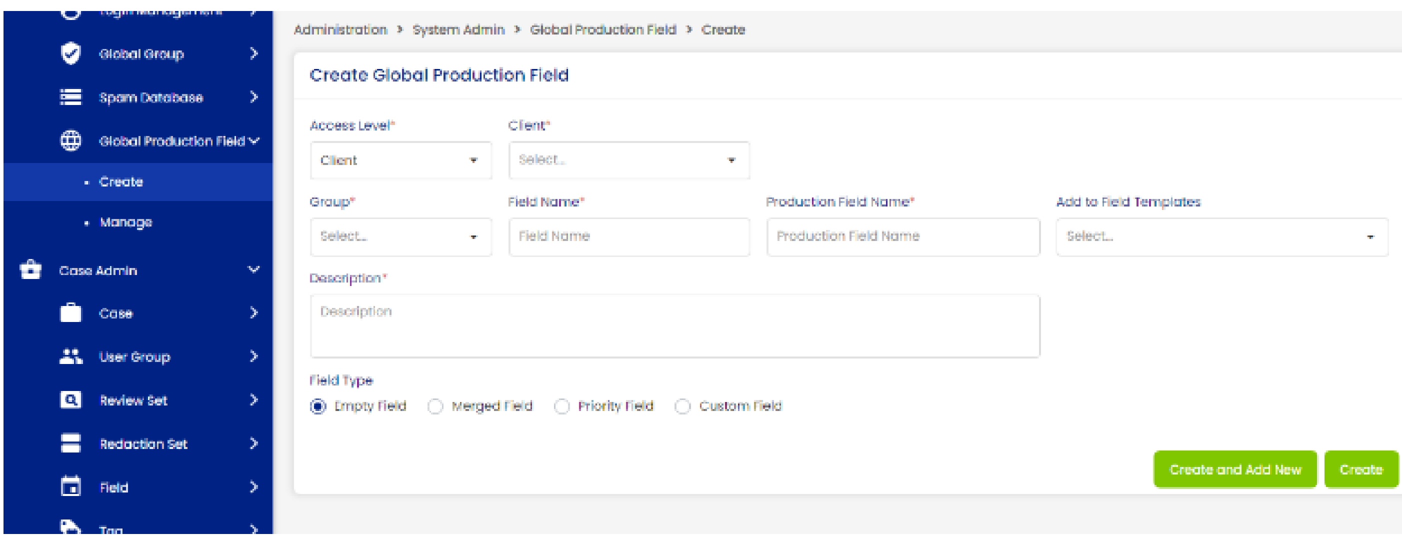
Execution of Automated Reboots: Following the initial reboot, a countdown timer begins based on the chosen interval. Once this timer reaches the specified interval, the system triggers an automated restart of the distributed service machine.

Impact of Manual Reboots: In the event that one manually reboots the distributed service machine before the scheduled automated reboot occurs, the timer resets. This reset ensures that the automated reboot will occur based on the interval from the time of the manual reboot, rather than from the last automated reboot.

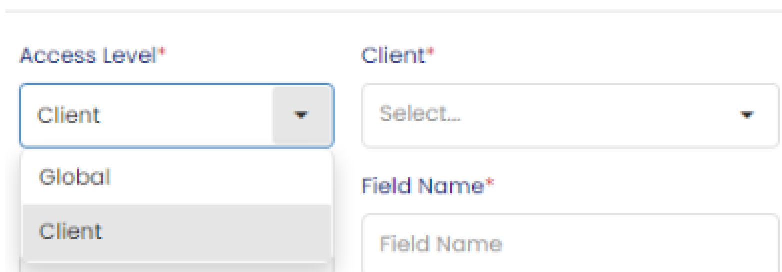
11.22 Global Production Field:

The Global Production Field is visible for Venio admin users by default, The Global Production field feature is there in the Venio Admin section of the VOD.

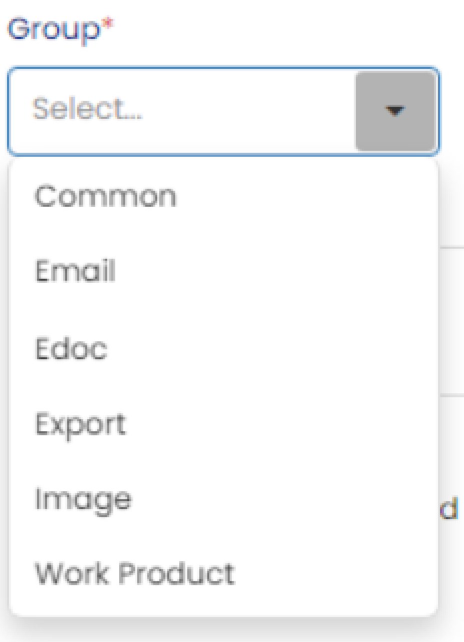


Click on the Global Production Field, create, it will open up the wizard to create the Global level production fields which can be used during the production

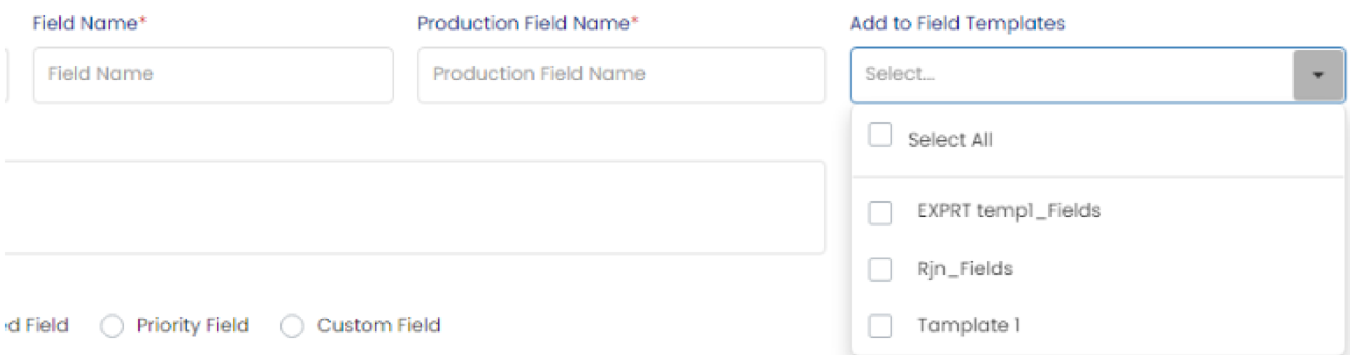
The Global production Field has two accesses, One is Global which can be accessed by all the users and the other is Client level. The Client level production will only be available for the users associated with the selected client



While creating the Field, The group of the production field can be selected from the dropdown



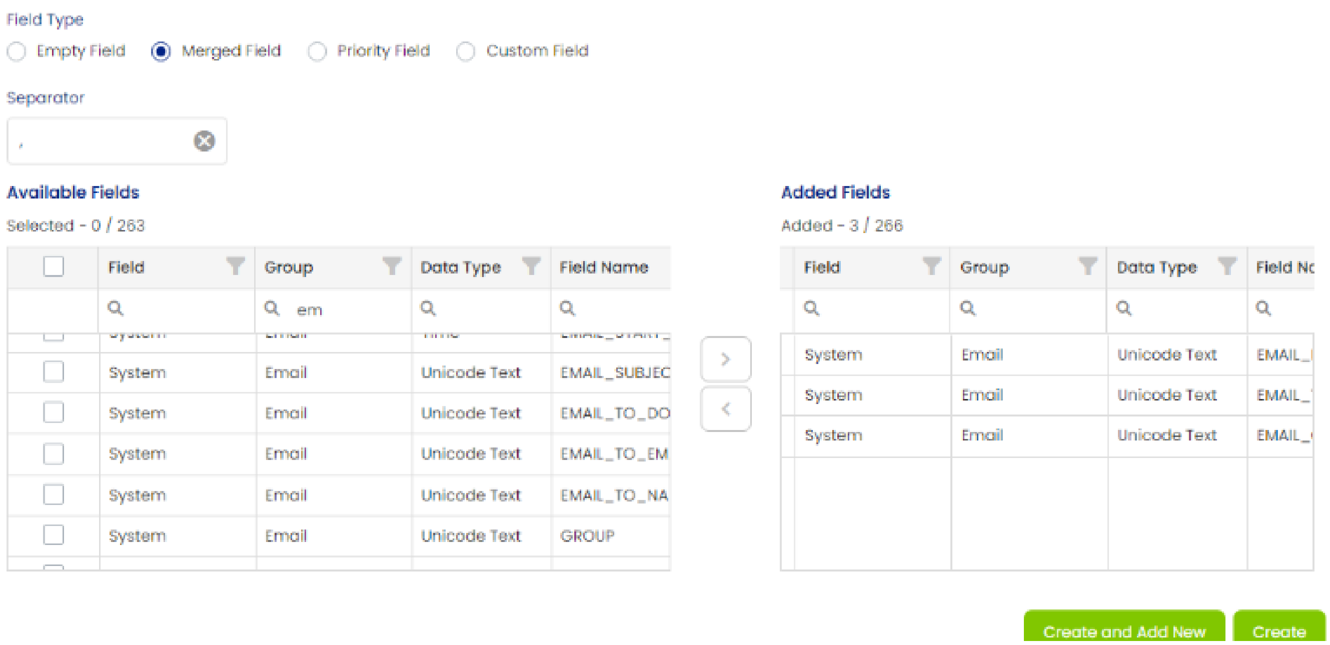
The Field name and the Production Field name should be provided which can be used in Production. If the global production is needed to be associated with any production field template. that can be performed by adding to the field template listed on the dropdown.



The description of the field can also be added while adding the field, the field description in the description section. The Field can be of four field types. The radio button is provided to select the Field type and create the as per the requirement. The fields are Empty Field, Merged Field, Priority Field and Custom field.

Empty Field for empty Field

Merged field is for the selecting the Venio fields which can be separated by selecting the delimiters



Priority Fields is the combination of the Venio fields which when exported will show the field which has highest priority if available else it would show the second highest priority

Custom Field is the Custom field which could be populated during the Production.

12 Case Admin Settings

Case Admin settings include everything from creating new cases to review sets, redaction sets, fields, tags, custodians, etc. Anything within a case can be created or edited here.

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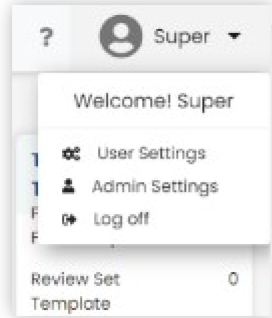
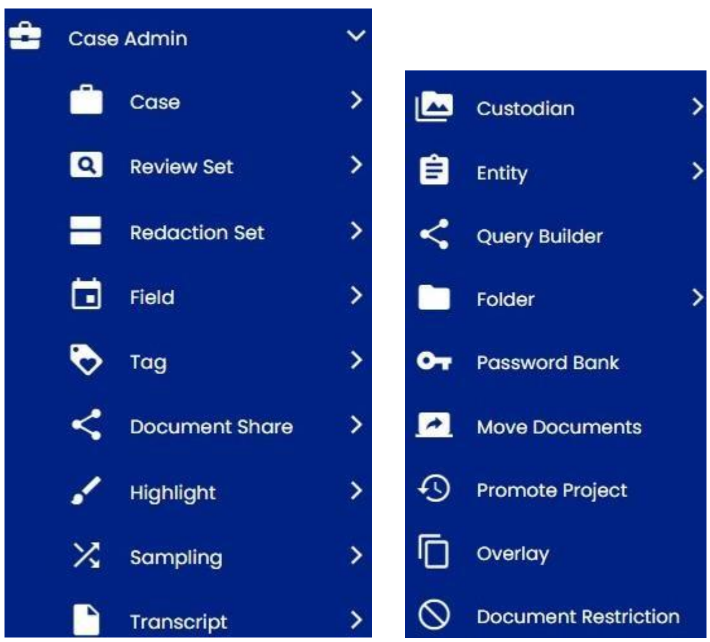
Both User and Admin Settings are found under the drop-down arrow ▼ next to your name in the upper right corner of the VOD screen.

User Settings contain individual user preferences.

Admin Settings may only be accessed by someone with Admin level permissions in VenioOne.



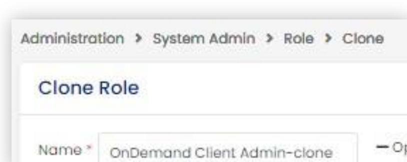
The Case Admin settings control the following areas:



The following action buttons are common within both the Case and System Admin modules.

View Edit Clone Review Analyze Delete

Easy Navigation
When making Admin Setting changes, a hyperlinked breadcrumb list of your location is displayed and may be used to quickly navigate to another area.



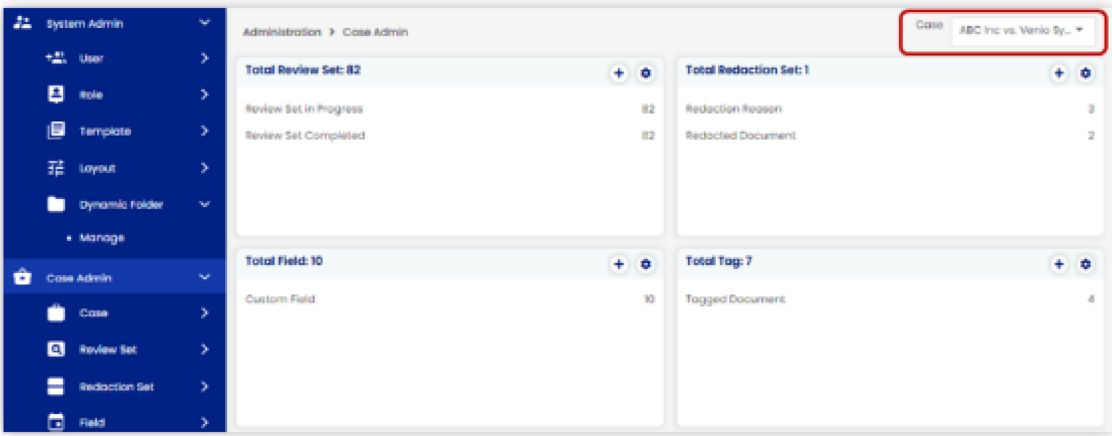
12.1 Case Admin Dashboard

Admin Settings > Case Admin

The Case Admin Dashboard displays cards (shown below) for major functions under Case Admin.

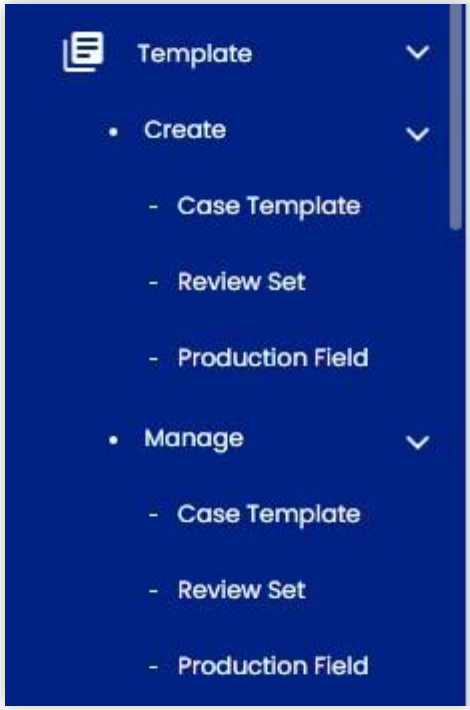
The buttons on the Cards may be used as shortcuts to Create or Manage the areas/items under each card.

IMPORTANT: Case Admin differs from System Admin in that you will need to ensure that you have selected the case using the Case drop-down list prior to making any changes.

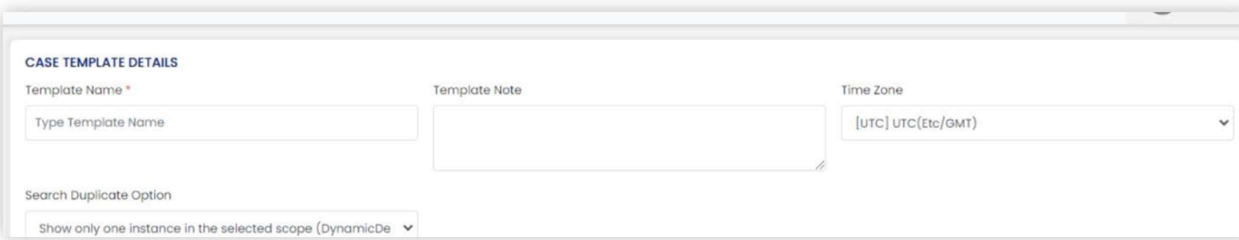


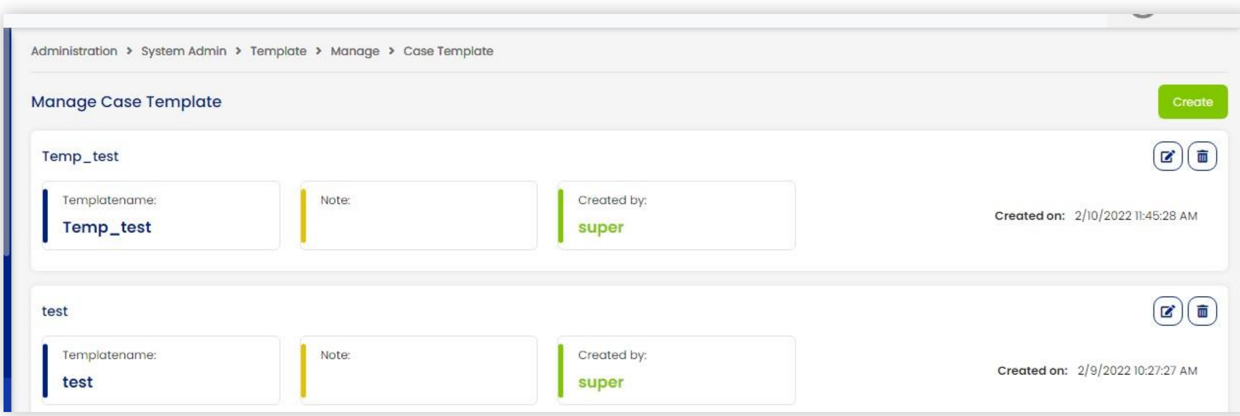
12.2 Case Template

Case Template is available under the Admin > Manage page. You can create a Case Template by navigating to the Template > Create > Case Template as shown below:



Once the case template is created, the controller moves to the Case Manage option.





You can edit and delete the case templates from the Edit and Delete icons on the right top corner.
A few pointers while creating a Case Template:

- While creating a case template, the license TOA features must be hidden.
- The template created should be automatically associated with the client.
- If the same template is associated with other clients, the user can manually assign those templates to others.
- In the default project template, the Update button is disabled.
- If the template is associated with more than one client, the template cannot be updated (Delete/Edit).

12.3 Case Admin

In this module, you can view all available cases and other links like review, analyze, upload and produce are available as per the user role.

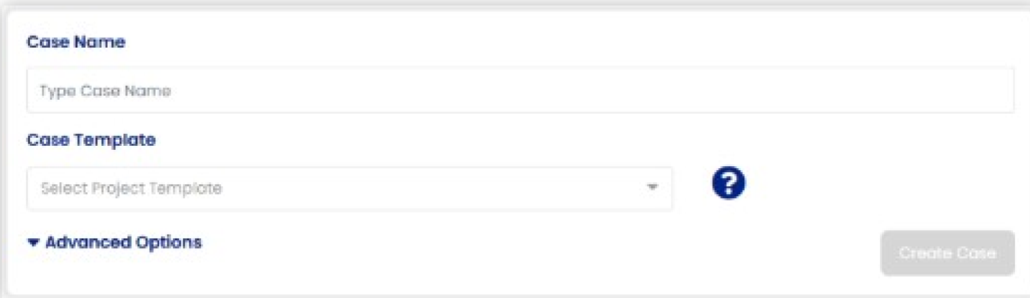
12.3.1 Create Case

In addition to the Create Case button that exists on the Project Launchpad, cases may also be created within the Case Admin settings.

Administration > Case Admin > Case > Create

Click the drop-down arrow next to your name in the top right corner.
Click Admin Settings > Case Admin > Case > Create.

The Create Case dialog displays.



Follow the steps in section 3.1 above to create the case.

12.3.2 Manage Case

Admin Settings > Case Admin > Case > Manage

Click the drop-down arrow next to your name in the top right corner. 2. Click Admin Settings > Case Admin > Case > Manage.

The Manage Case dialog displays cards for each case with basic statistics and an option to Edit the case.

 button.

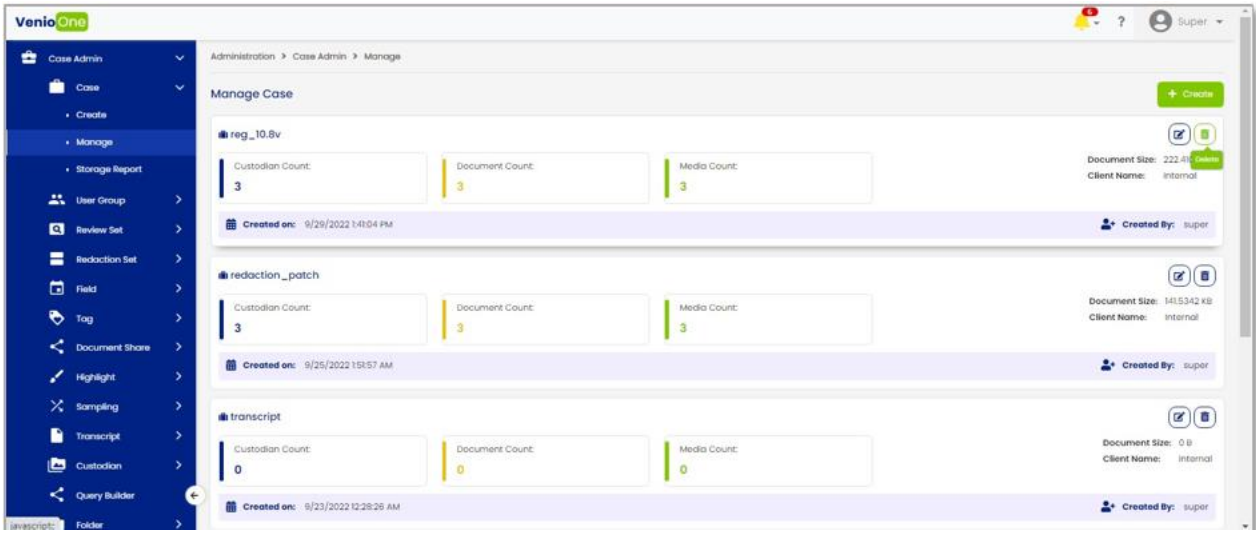
Click the Edit

12.3.2.1 Delete Case

As an Admin, you can delete a case from the Manage page.

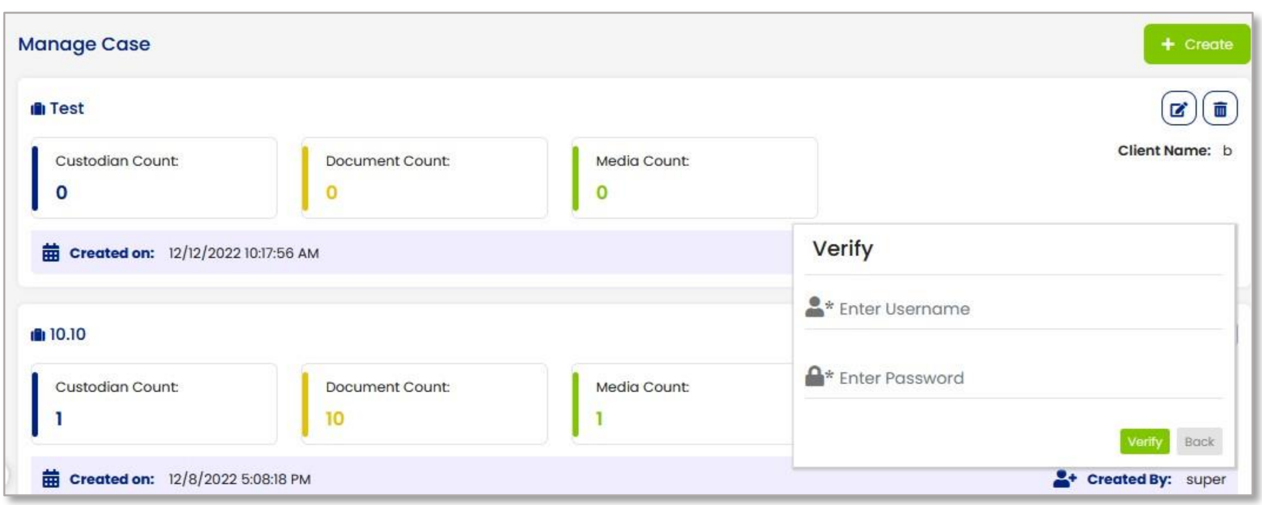
1. Click the drop-down arrow next to your name in the top right corner.
2. Click Admin Settings > Case Admin > Case > Manage.

The Manage Case dialog displays cards for each case with basic statistics and an option to Edit and Delete the case.

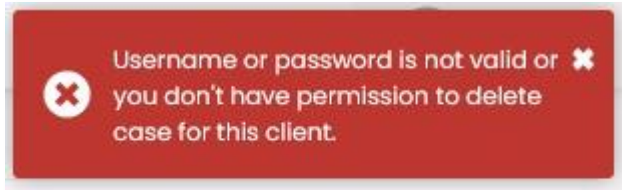


3. When you click on the Delete icon, a warning message pops up:

4. Only an Admin or Super Admin has the permission to delete the cases. By clicking on YES, authentication message appears:

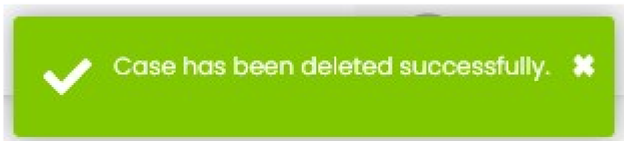


5. Enter the credentials and click Verify.
6. If wrong credentials are entered or you do not have the permissions to delete the case, a popup message appears:



Note: IDP users are not authenticated.

7. If the credentials are correct, upon successful login, the case is deleted, and a success message appears confirming the deletion.



Once a case is deleted, all the corresponding files are also deleted and can no longer be accessible to the users.

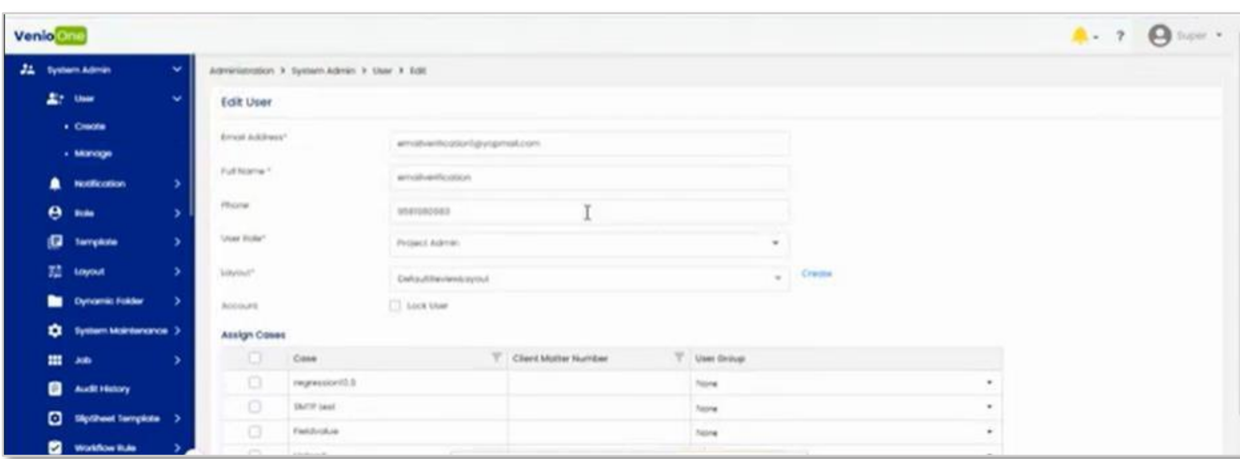
12.3.2.2 User Email Verification

Admin Settings > Case Admin > Case > Manage >

Click the drop-down arrow next to your name in the top right corner. 2. Click Admin Settings > Case Admin > Case > Manage.

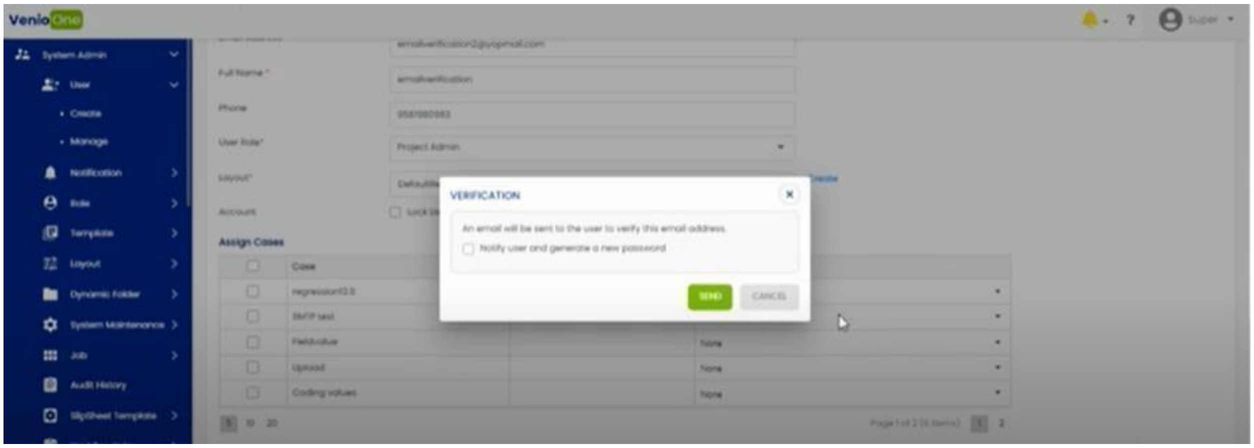
The Manage Case dialog displays cards for each case appears.

Select the user for which you wish to verify the email ID. Click on the Edit icon.

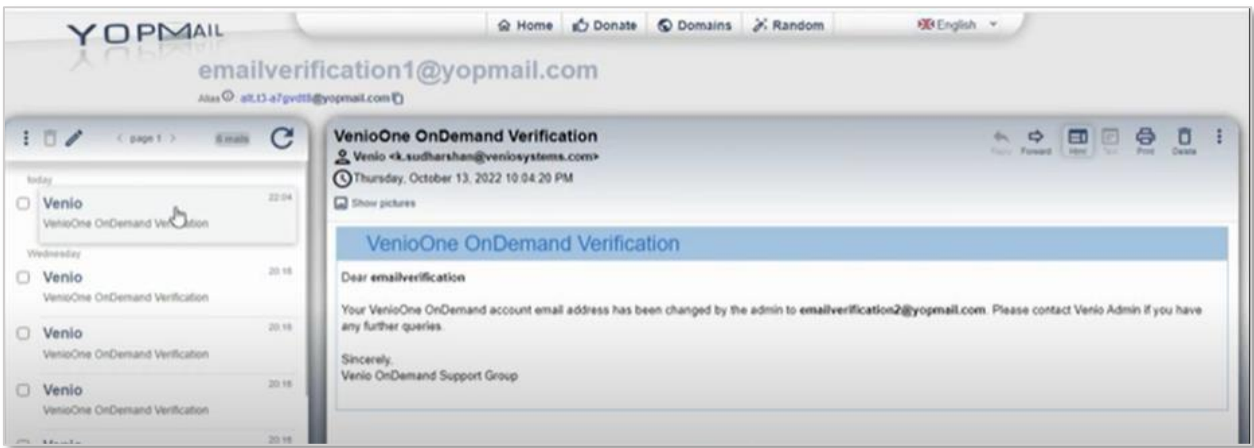


8. Change the email id in the Email Address field and click Update.

A verification message that an email will be sent to the user for confirmation appears.



A notification of change in the email address is sent to the user.



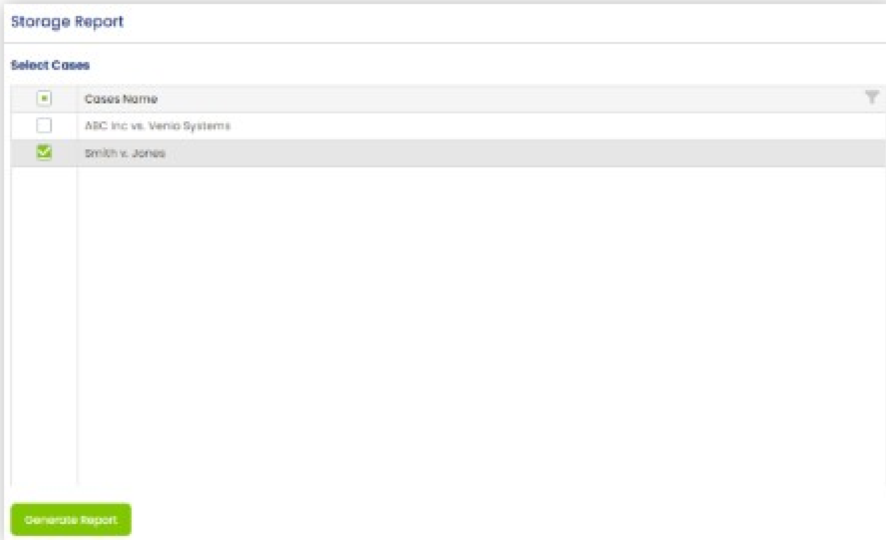
A link to Verify the email id is also sent to the user through which the user can login and verify the new email address.

12.3.3 Case Storage Report

Admin Settings > Case Admin > Case >Storage Report

Click the drop-down arrow next to your name in the top right corner. 2.
Click Admin Settings > Case Admin > Case > Storage Report.

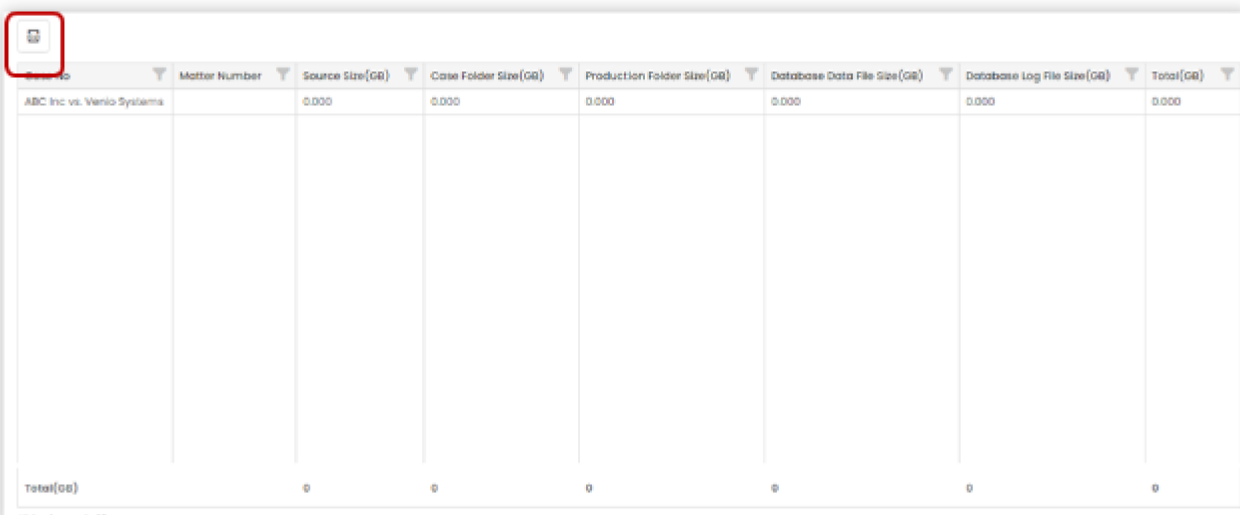
The Storage Report dialog a list of cases.



Check the boxes next to the cases you wish to include.
Click the Generate Report button.

The Storage Report displays at the bottom of the screen.

NOTE: The amounts shown in the Storage Report are shown in GBs.



If needed, use the Export all data button at the top of the report.
When the CLOUD key is enabled in the control setting table (tbl_pj_controlsetting PCD level) the following report headers are displayed:- Total Storage:

Used Storage:

Available Storage:

Report Generated On: 01/19/2021 03:50:03 AM

Total Storage(GB): 1000.000

Used Storage(GB): 0.337

Available Storage(GB): 999.663

Case No	Matter Number	Source Size(GB)
VODProject		0.000
VOD_Old		0.000
VOD_Old_2		0.000
VODIngestion2		0.000
jhhd		0.000
dfghjkl;		0.000
~~Case for Testing Multitenant~~	~~CMN~~	0.000
Total(GB)		0.071

When the CLOUD key is off or not present in the control setting table (tbl_pj_controlsetting PCD level), the following report headers are not displayed:-

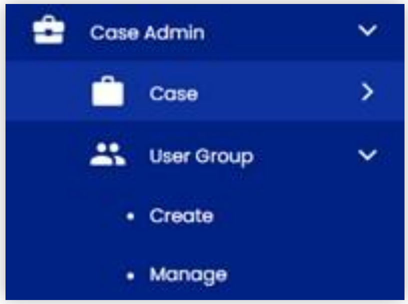
Total Storage:
Used Storage:
Available Storage:

Report Generated On: 01/15/2021 10:14:57 AM

Case No	Matter Number	Source Size(GB)	Case Folder Size(GB)
VODProject		0.000	0.000
VOD_Old		0.000	0.000
VOD_Old_2		0.000	0.000
VODIngestion2		0.000	0.000
jhhd		0.000	0.000
dfghjkl;		0.000	0.000
~~Case for Testing Multitenant~~	~~CMN~~	0.000	0.000
Total(GB)		0.071	0.150

12.4 User Group

The User Group module allows you to create and manage user groups in a project. You can also assign/remove users from the project user group from this module.

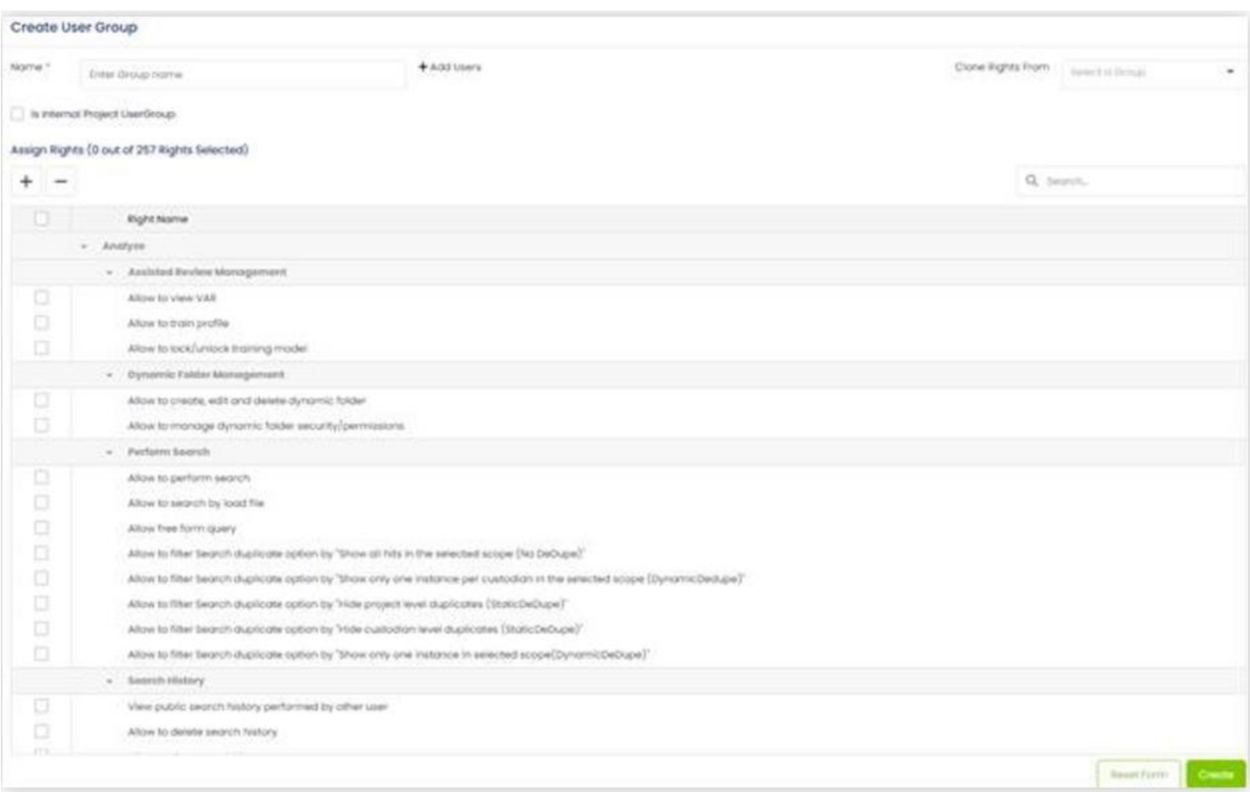


12.4.1 Create User Group

To create a user group, follow the steps below:

1. Click drop-down arrow next to your name in the top right corner.
2. Click Admin Settings > Case Admin > User Group > Create.

The Create User Group page is displayed



3. Enter/Select all the required details and click Create to create the role with the assigned rights.

12.4.2 Manage User Group

This page displays all the user groups (inbuilt and custom). You can edit, delete, and clone the user groups from this page.

To view and modify user groups, follow the steps below:

Click the drop-down arrow ▾ next to your name in the top right corner.
Click Admin Settings > Case Admin > User Group > Manage

The Manage User Group cards are displayed with options to Edit, Delete or Clone a User Group. The Manage User Group cards also give a summary of each User Group's rights. For more detailed information, click the Edit button.

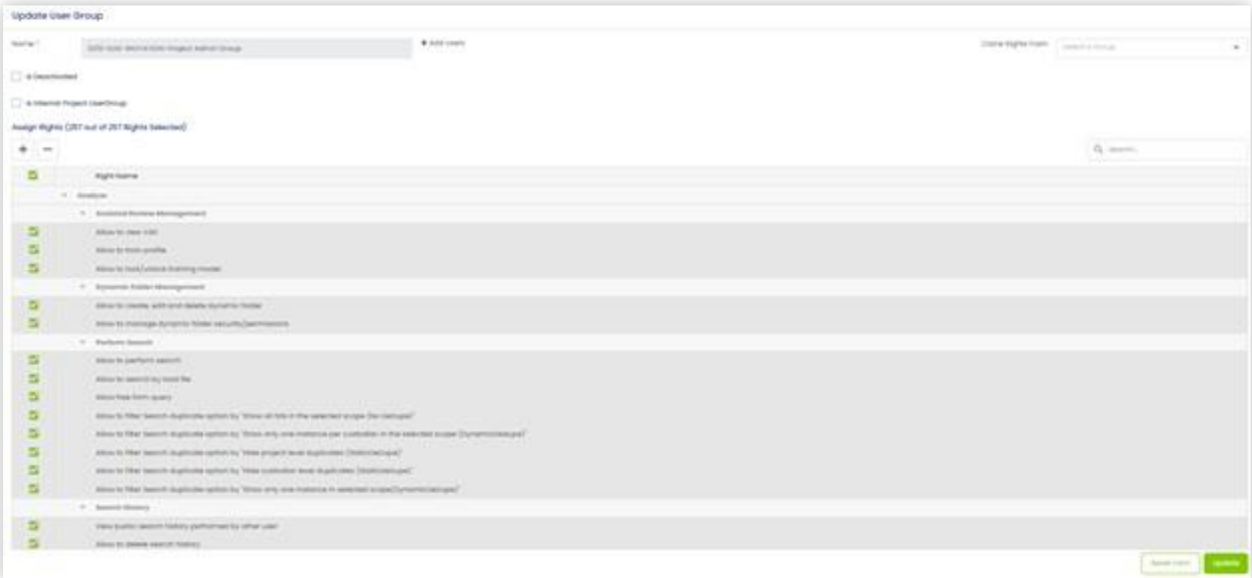
12.4.2.1 Edit User Group

To edit user group, follow the steps below:

Click the drop-down arrow ▾ next to your name in the top right corner.
Click Admin Settings > System Admin > User Group> Manage.
The Manage User Group screen is displayed containing user group cards with options to Edit, Delete or Clone a user group.

3. Click the Edit button.

The Update User Group page is displayed.



Change the rights and click Update to save changes.

Allow to Generate RSMF file group permission is by default provided to Site Admin, Project Admin, and OnDemand Client Admin.

12.4.2.2 Clone User Group

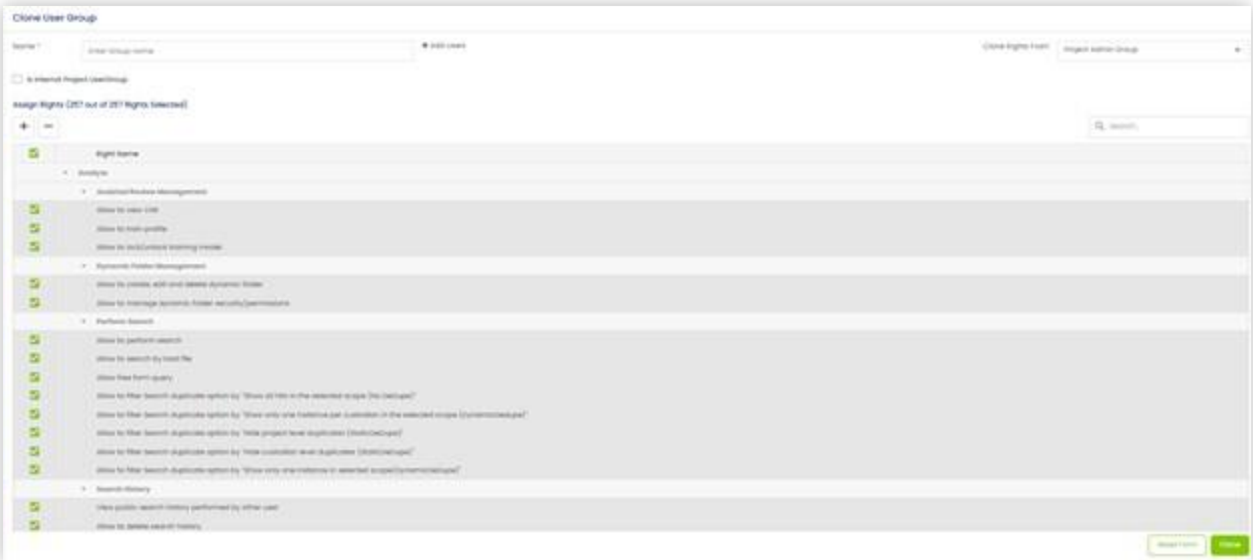
To clone user group, follow the steps below:

Click the drop-down arrow next to your name in the top right corner. Click Admin Settings > System Admin > Role > Manage

The Manage Role screen is displayed containing role cards with options to Edit, Delete or Clone a user group.

Click the Clone button.

The Clone User Group page is displayed.



Enter the name and click the Clone button to clone the user group.

12.4.2.3 Delete User Group

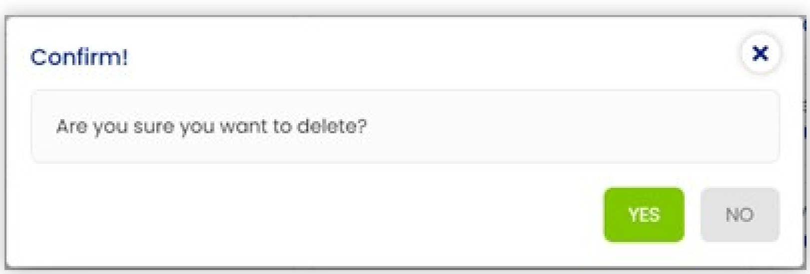
To delete a user group, follow the steps below:

1. Click the drop-down arrow next to your name in the top right corner.

Click Admin Settings > System Admin > User Group> Manage

The Manage User Group screen is displayed containing user group cards with options to Edit, Delete or Clone a user group.

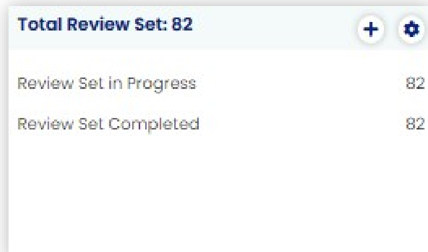
Click the Delete button. A confirm pop up window is displayed.



Click Yes to delete User Group or No otherwise.

12.5 Review Set Admin

Within Case Admin, you may create and manage Review Sets, as well as view the Review Set Dashboard, which gives detailed information about a review's progress.

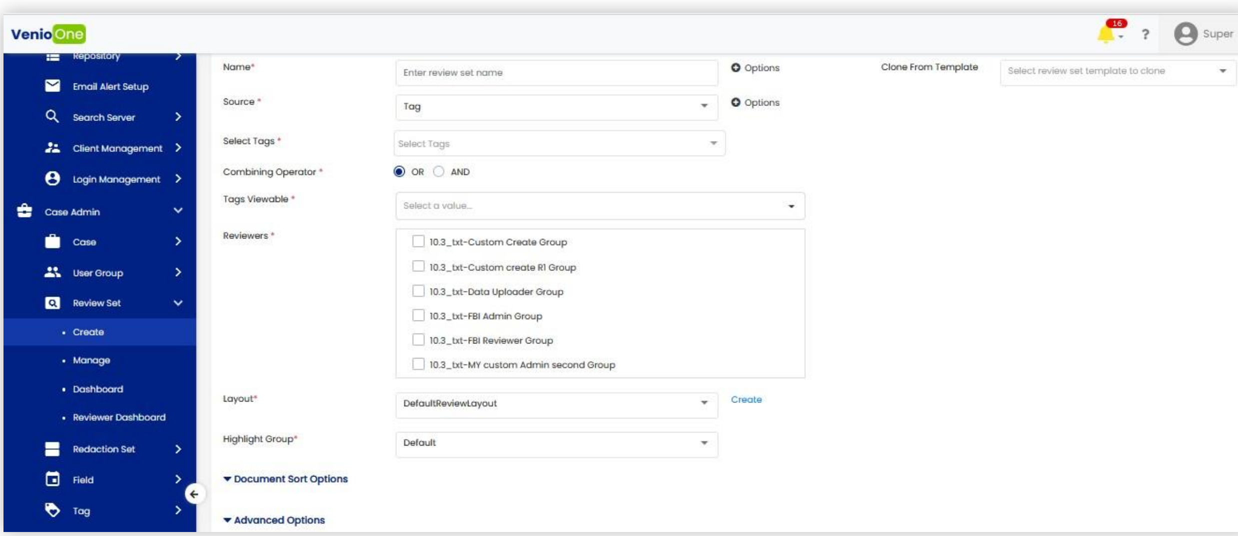


12.5.1 Create Review Set

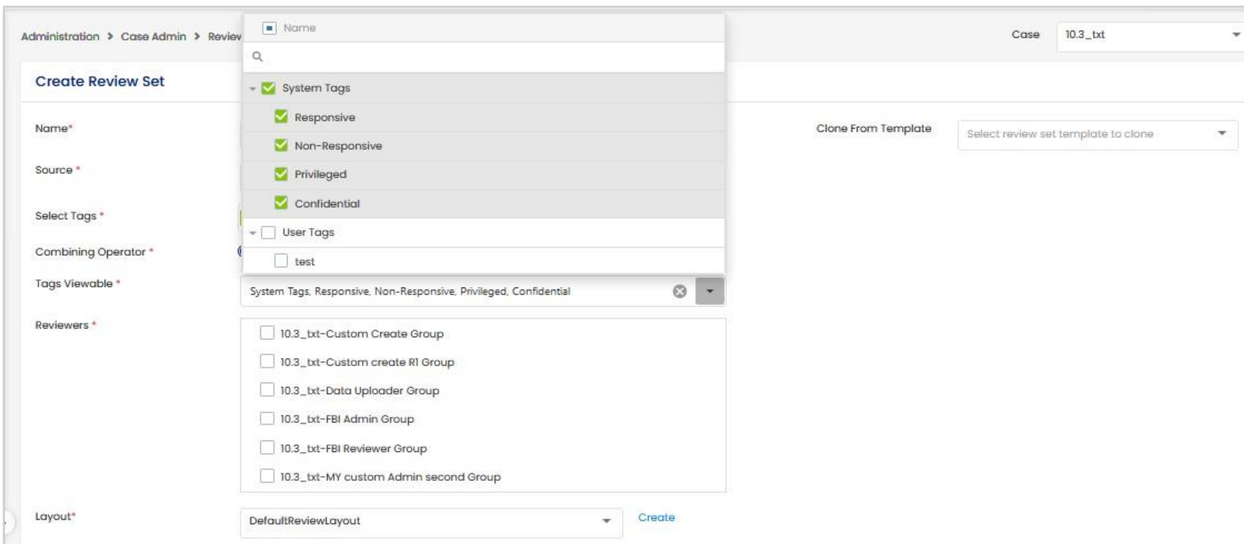
Admin Settings > Case Admin > Review Set > Create

Click the drop-down arrow next to your name in the top right corner.
Click Admin Settings > Case Admin > Review Set > Create
OR
Click Admin Settings > Case Admin > click the Create Review Set button.

The Create Review Set dialog displays.



OPTIONAL: Select a review set template from the Clone from Template drop-down list and adjust the options below as needed.
Enter the Name for the review set.
Select a Source from the drop-down list. The options are Saved Search, Folder, and Tag.
Select the Saved Search, Folder, or Tag to be used from the Select… drop-down list.
Select either OR or AND as the Combining Operator for the Source(s).
Select the Tags Vieweable. All the tags that are related to the Review Set are displayed under this field. When you select one tag, all the tags under that is selected. Use the checkboxes to select the tags you wish to include.

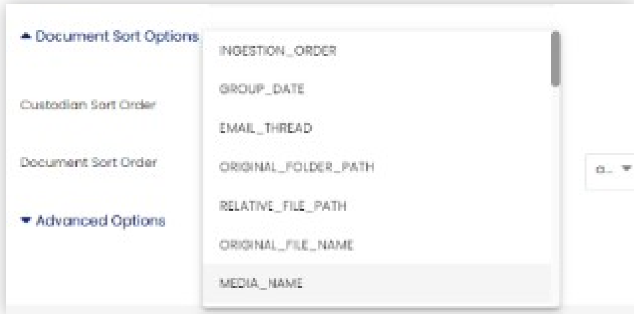


Use the check boxes to select the Reviewer group(s) to be included.
Use the Layout drop-down list to select a Review Dashboard layout for the Review Set.

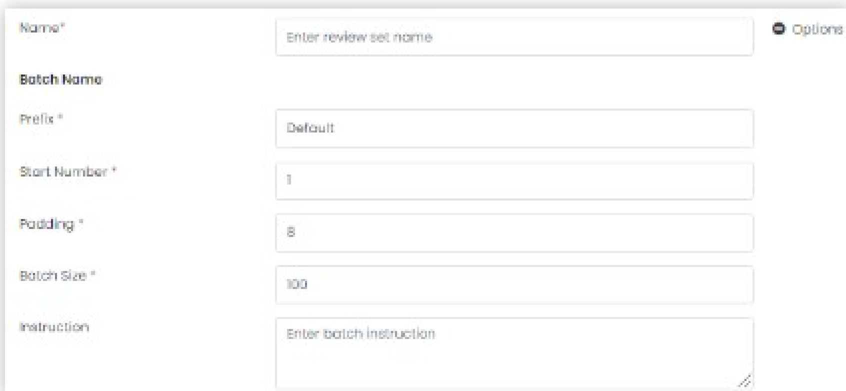
> NOTE: The Create link adjacent to the Layout field may be used to add a new Reviewer Dashboard Layout.

OPTIONAL: Use the Highlight Group drop-down list to select a group other than the default.
OPTIONAL: Use the Document Sort options to change the way the documents in the review set are sorted. Documents may be sorted by Custodian (ascending/descending) and within that custodian adjust the Document Sort Order (ascending/descending). However, this feature is not applicable for CAL review sets.

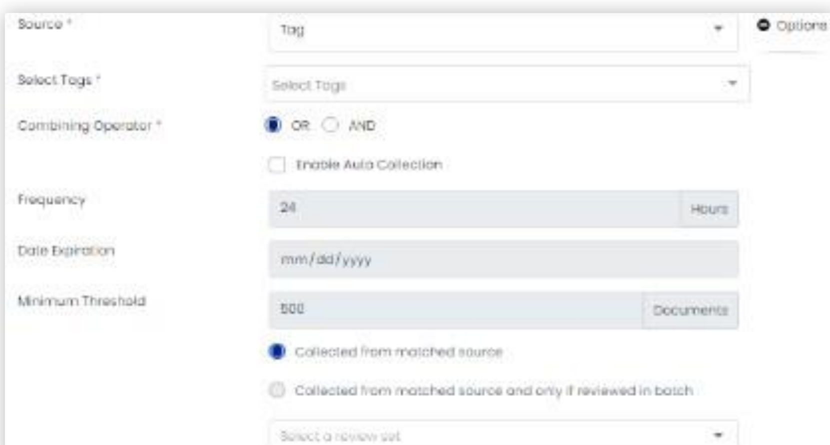
Venio



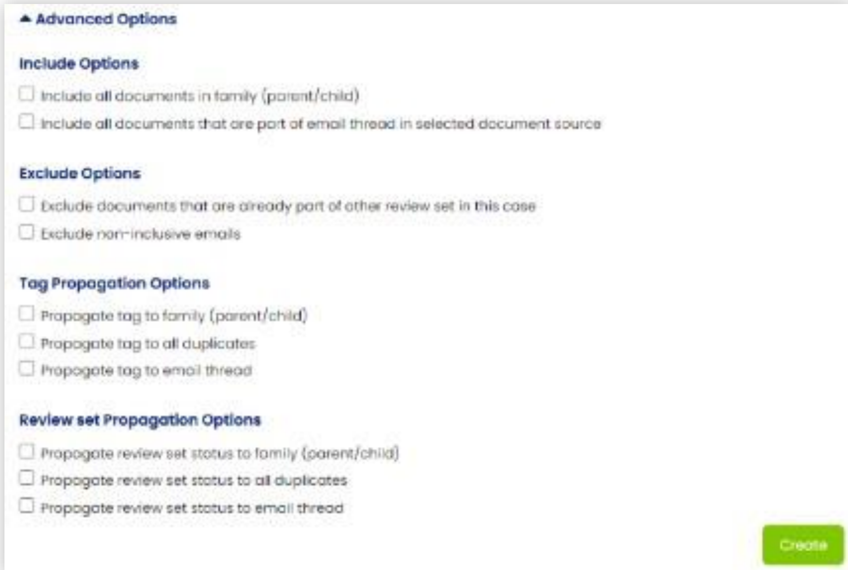
OPTIONAL: Click the Options link adjacent to the Name field to display additional Batch Name options.



OPTIONAL: Click the Options link adjacent to the Source field to display additional options.



OPTIONAL: Click the Advanced Options link to display the following options. Use the check boxes to select the options needed.



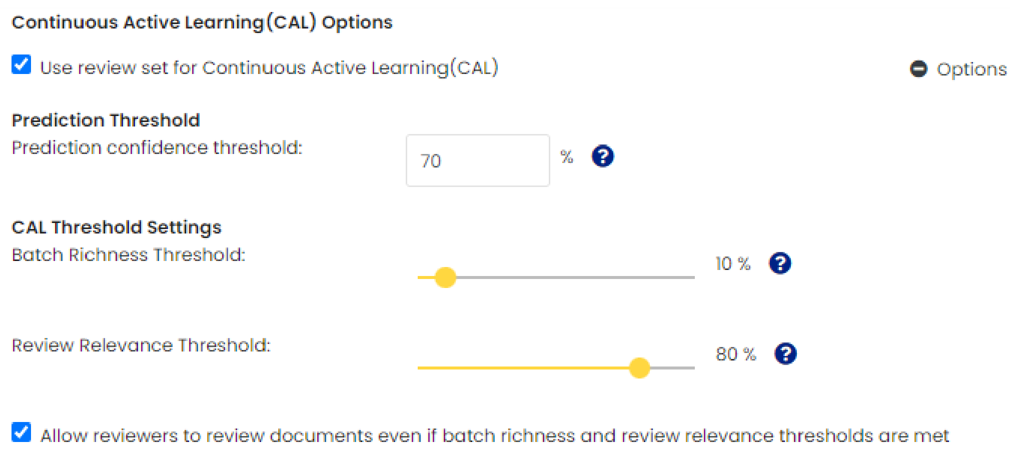
Click the Create button to create the Review Set.

The Review Set is created and displays on the Review Set tab of the Project Launchpad when the designated review groups login.

12.5.5.1 Create a Continuous Active Learning (CAL) Review Set

1. Scroll to the bottom of the list and select the checkbox to Use review set for Continuous Active Learning (CAL).

The Continuous Active Learning (CAL) Options are displayed.

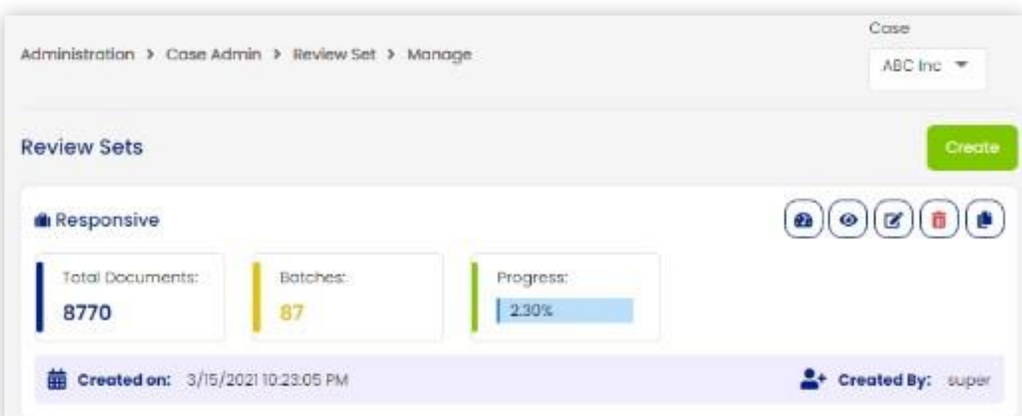


12.5.2 Manage Review Sets

Admin Settings > Case Admin > Review Set > Manage

Click the drop-down arrow next to your name in the top right corner. 2. Click Admin Settings > Case Admin > Review Set > Manage.

The Review Sets dialog displays cards for the Review Sets in the selected case. Use the Case drop-down to view other cases.



Use the buttons on the Review Set cards to:

- Go to the Review Set Dashboard
- View
- Edit
- Delete
- Clone

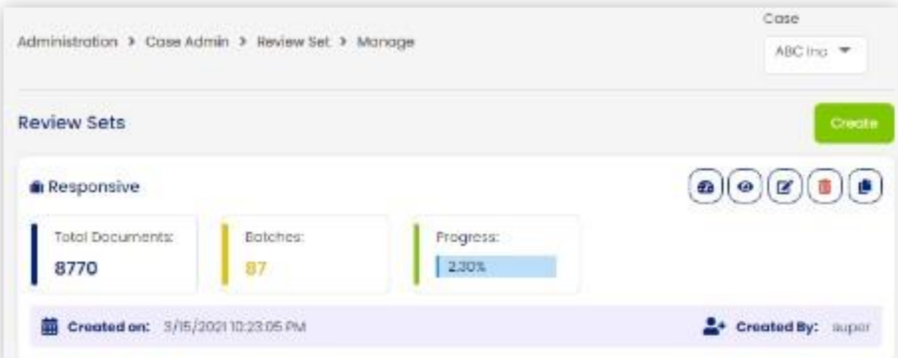
Use the Dashboard button load the Review Set's information into the Review Set Dashboard.

12.5.2.1 Reassigning Review Set Batches

Admin Settings > Case Admin > Review Set > Manage >Edit

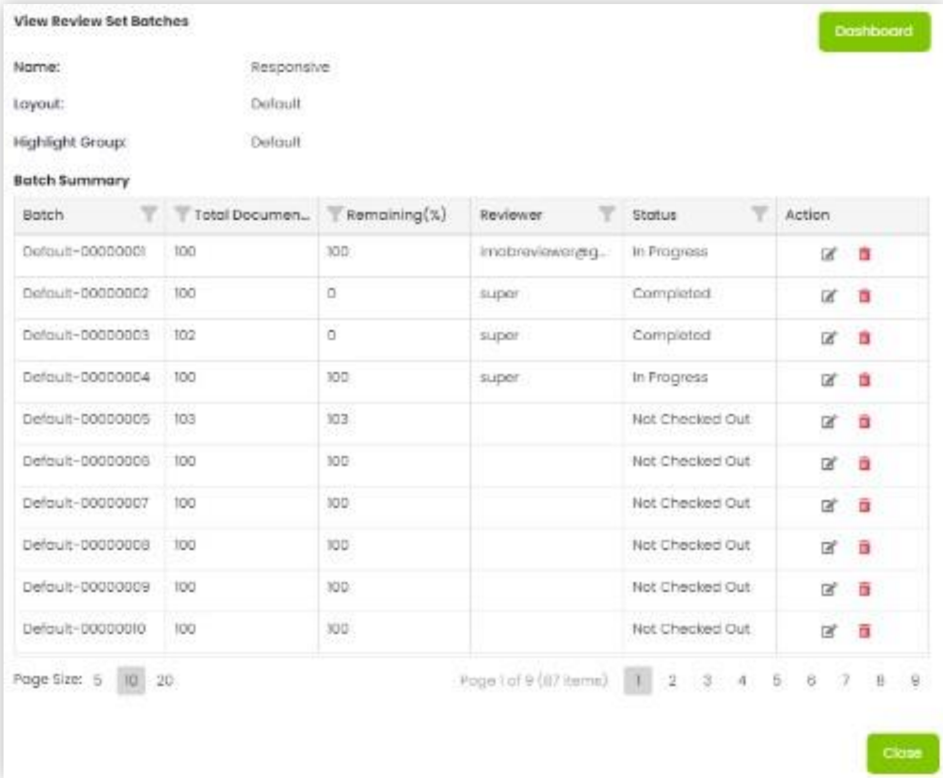
Click the drop-down arrow next to your name in the top right corner. 2. Click Admin Settings > Case Admin > Review Set > Manage.

The Review Sets dialog displays cards for the Review Sets in the selected case. Use the Case drop-down to view other cases.



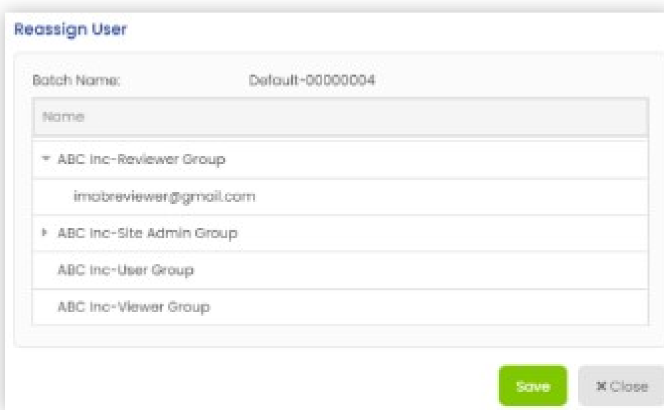
Click the View button on the Review Set card.

The View Review Set Batches dialog displays a Batch Summary for the Review Set.



Click the Edit button next to a batch.

The Reassign User dialog displays.



Select the user and click the Save button.

A message will display confirming the reassignment of the batch.

If you try to delete the CAL Review set when Web Export service is stopped, an error is displayed: Failed to access and delete CAL files on project location. Venio Export Service is not installed or service is not running. Please contact your administrator to check Venio Export Service status in Venio Web Server.

If you delete the CAL Review set, the custom field created for predicting the score for the same CAL Review set is also deleted from Fields Management.

12.5.3 Dashboard

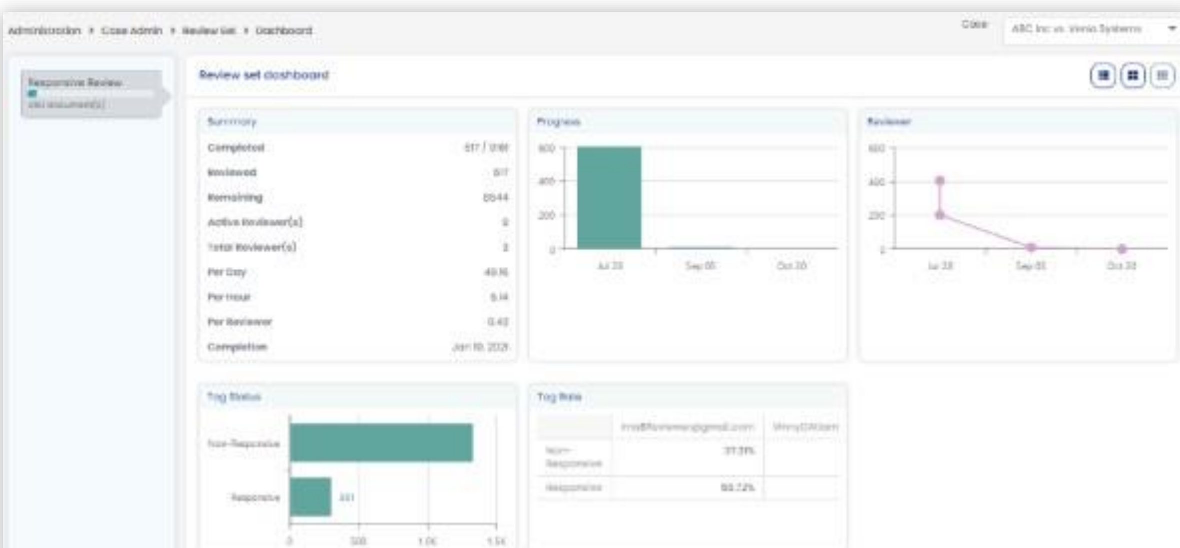
Admin Settings > Case Admin > Review Set > Dashboard

Click the drop-down arrow next to your name in the top right corner. 2.
Click Admin Settings > Case Admin > Review Set > Dashboard.

The Review Set Dashboard displays. Review sets are listed in the left column of the dashboard.

Click a Review Set to display its information.

The widgets within the dashboard display information about the selected review set.

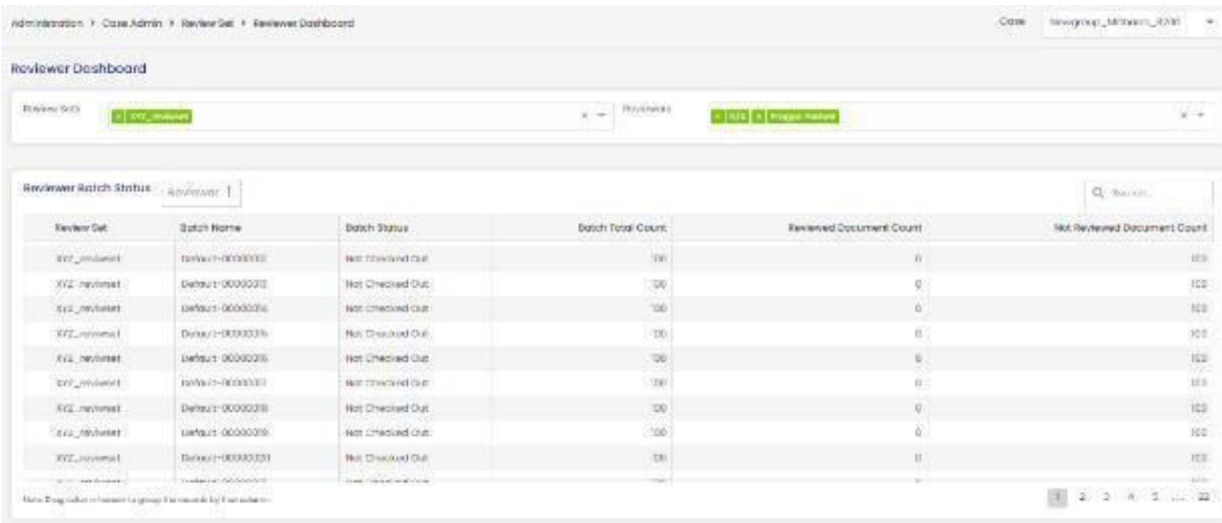


12.5.4 Reviewer Dashboard

Admin Settings > Case Admin > Review Set > Reviewer Dashboard

The Reviewer Dashboard shows the progress and status of all the reviewers in a case or across multiple cases.

Use the Review Sets and Reviewers drop-down lists to view data for specific Review Sets and Reviewers, respectively. After these items are selected, the review set batches with the corresponding status are displayed in the dashboard.



Drag a column heading to the top of the Reviewer Batch Status section to group items by that heading.

Review set batches can also be searched and filtered as required. Depending on the criteria selected to populate the Reviewer Dashboard, the Reviewer Performance chart will display metrics on the performance for each reviewer.

The metrics can be displayed by: Day, Week, Month, or Year.

The Reviewer Accuracy chart shows metrics on the accuracy of each reviewer compared to other reviewers.

12.5.5 Utilizing Continuous Active Learning (CAL)

As reviewers begin reviewing documents and checking in batches they have reviewed, CAL identifies and prioritizes the documents it believes are most likely to be relevant to the matter being investigated. CAL then creates a prioritized queue for review. As the manual review proceeds, the review queue is continuously reshuffled and reprioritized throughout the process as CAL learns more about what is relevant and adjusts its predictions accordingly. Eventually, CAL learns enough about the documents and, based on the threshold settings that you have set, it predicts the remaining documents. Reviewers are notified that there are no additional batches in the review set.

During the prediction process, “auto” tags are applied by CAL. Whereas, during the manual review, “manual” tags are applied by the reviewers, so that it is easy to distinguish which tags have been applied by CAL vs. the human reviewers. After CAL is done, sampling can easily be used to verify the accuracy of its predictions.

12.5.5.1 **Create a Continuous Active Learning (CAL) Review Set**

Admin Settings > Case Admin > Review Set > Create

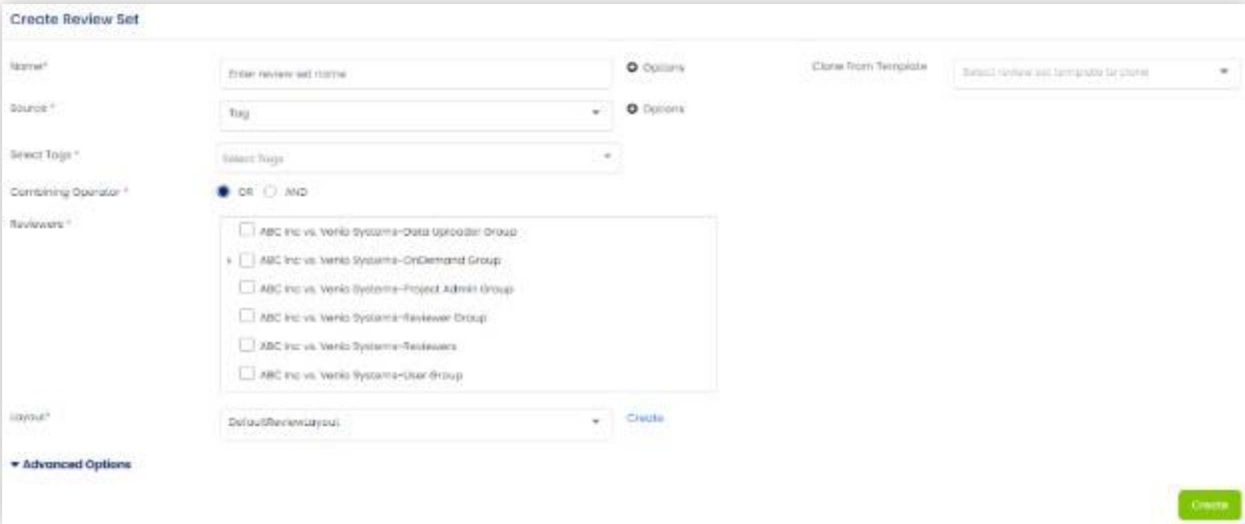
Creating a CAL Review Set starts the same as a non-CAL review but has additional options to set. To access the CAL settings, expand the Advanced Options and then enable the Continuous Active Learning (CAL) settings checkbox. Detailed instructions are below.

To create a CAL Review Set, follow these steps:

1. Click the drop-down arrow next to your name in the top right corner.
2. Click Admin Settings > Case Admin > Review Set > Create
   OR
   Click Admin Settings > Case Admin > click the Create Review Set button.

The Create Review Set dialog displays.

3. Enter the Name and other required settings for the review set.



4. Click the Advanced Options link.

   The Advanced Options are displayed.

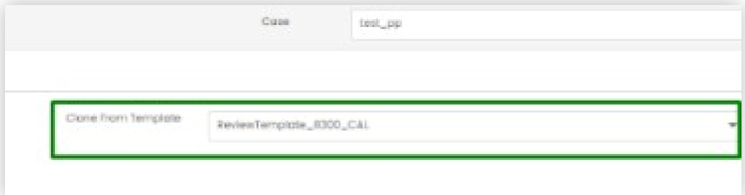
5. Scroll to the bottom of the list and select the checkbox to Use review set for Continuous Active Learning (CAL).

   The Continuous Active Learning (CAL) Options are displayed.

6. Customize the following CAL settings detailed below and then click the Create button.

12.5.5.2 Using a Reviewset Template

If you would like to use a Reviewset template to create the project, select a Reviewset from the Clone from Template drop-down in the upper right corner.



12.5.5.3 CAL Review Settings

The settings below will control how CAL creates the review set and handles the prediction of the documents within the review set. The Help button can be used to view detailed information about the individual CAL settings.

Prediction Threshold: Only documents above this threshold will be categorized by CAL.

CAL Threshold Settings

These two settings control when CAL stops presenting batches to reviewers. Both thresholds must be met in order for prediction to begin.

- Batch Richness Threshold: Refers to the percentage of relevant documents in a batch. Batch richness increases as CAL learns from the first few batches of documents that are reviewed. Eventually, it hits a plateau and drops off rapidly, hitting the threshold set.
- Review Relevance Threshold: Review Relevance refers to the percentage of relevant documents found when a batch is reviewed. Review relevance increases at a steady rate as CAL learns from the documents that have been reviewed and sorts document to present batches richer in relevant documents. Eventually, the percentage of relevant documents presented rises above the threshold that has been set and levels off.

For example, if primary category documents in the control set equal 40% and the CAL review set has 10,000 documents, the projected number of primary/responsive documents in the CAL review set equal 40% of 10,000 = 4000.

If a total of 3000 documents have so far been identified as primary/responsive by reviewers after reviewing batch after batch and the "review relevance" reached so far is 3000 out of 4000, tent that’s 75%.

If the review relevance threshold is set at 80% (3200 out of 4000 documents), then the process is still short of identifying 200 more primary documents and the review should be continued.

Control Set Size

There are 3 methods you can use to create the control set.

- Standard normal distribution: Select documents from the entire population.
- Percentage of population: Select a specific percentage of documents. Default is set at 10%.
- Number of documents: Select a specific number of documents. Default is set at 1000 documents.

Confidence Level: Confidence level indicates how certain you can be of a sampling method. The 95% confidence level means you can be 95% certain; whereas a 99% confidence level means you can be 99% certain. Most researchers use the 95% confidence level.

Confidence Interval: Confidence interval (also called margin of error) indicates the acceptable variance up or down from the Confidence Level.

CAL Control Set Format

- For a Fixed Control Set, a number of first documents from the CAL review set will be considered as a control set by the system.

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- For a Dynamic Control Set, the number of documents from the CAL review set will vary based on the Control Set Quote and maximum control set document count parameters. Dynamic Control Set is the default.

All of the settings above determine the Control Set Size. The "maximum" indicates that the control set document count can never exceed this value, though in the case of dynamic control set, there may be a lesser control set document count than this value.

Control Set Quota: It is quota (or fraction) of review set documents which are set aside as control set documents. Maximum (and also default) is 5%. For example, for a review set with 100,000 documents, a maximum of 5000 documents can be set as control set documents.

The distribution of control set documents across review batches will adjust accordingly: -

- The first few batches will have 50% of batch size as control set documents.
- After the maximum control set document count is met, it is reduced to the chosen percent (i.e. 5% by default) until the control set documents are exhausted.

Control Set Documents: This value is derived from Control Set Size parameter above and serves the same purpose.

Training Set Documents:

Unless there are enough primary/responsive documents (i.e. 5) in the training set, then training of the CAL model will not be triggered. This value represents that minimum primary/responsive training document count, which when reached, shall trigger training.

When review progresses, there can be a huge number of training documents after rounds of batched review, decreasing engine performance. To put a limit to an ever-growing number of training documents, this value represents the maximum number of possible training set documents that the engine can process. If training documents exceed this value, then old training documents will not be considered during training.

NOTE: When the system doesn't have enough primary category files (i.e. 5 docs) to trigger training, the system will borrow all primary category files from the Control Set until reaching the primary category minimum count.(i.e. 5) and then the system will return the borrowed files.

CAL Review Settings [Below Review Relevance Threshold]

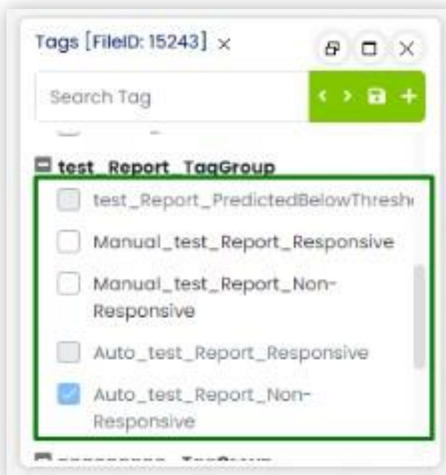
- Checkbox - Allows reviewers to review documents even if batch richness and review relevance thresholds are met. It is checked by default. The admin is able to edit the setting.

What happens for the reviewers is:

If the threshold is met and the checkbox is checked and user checks out the batch, below message is prompted “The reviewset thresholds (both batch richness and review relevance) have been met. Would you like to continue reviewing the remaining documents?” There will be 2 buttons “Continue to Review” and “Cancel”.

If the threshold is met and the checkbox is not checked, below message is prompted “The reviewset thresholds (both batch richness and review relevance) have been met. Reviewing more batches are not made available. Contact your administrator for further actions.” and do not allow to checkout any batch.

12.5.5.4 **CAL-Specific Tags**



NOTE: These are the CAL-specific tags that appear when a CAL review set is created. The Auto tags are used by CAL Manual tags display only if you have permission to use them for tagging/untagging.

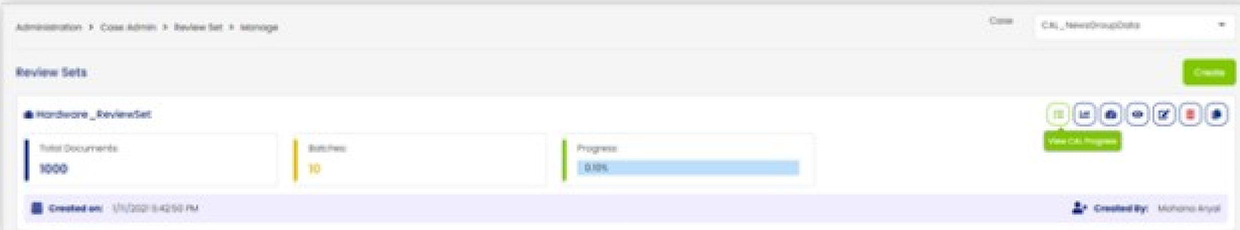
12.5.5.5 **Managing CAL Review Sets**

Navigate to Admin Settings > Case Admin > Review Set > Manage

NOTE: These icons appear only for CAL enabled review sets.

CAL Progress

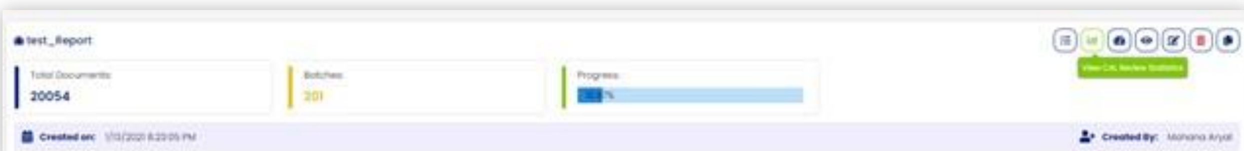
Click the View CAL Progress (☰) button to view CAL’s progress.



The CAL Progress dialog displays.

CAL Review Statistic Chart

Click the View CAL Review Statistics ( ) button.

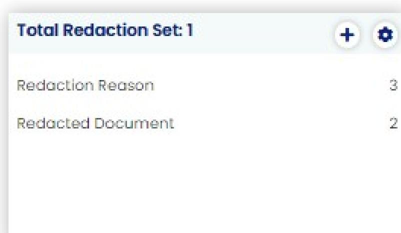


The statistics on batch richness and review relevance are displayed.

When you create a CAL enabled review set, a custom field is created for such a review set with field name as PS_<Review set name>, data type as var(10), read only access to all the existing user group, and associating the custom field with CAL profile. The custom field is created in Case Admin→Field→Security.

12.6 Redaction Set Admin

Within Case Admin, you may create or manage Redaction Sets.



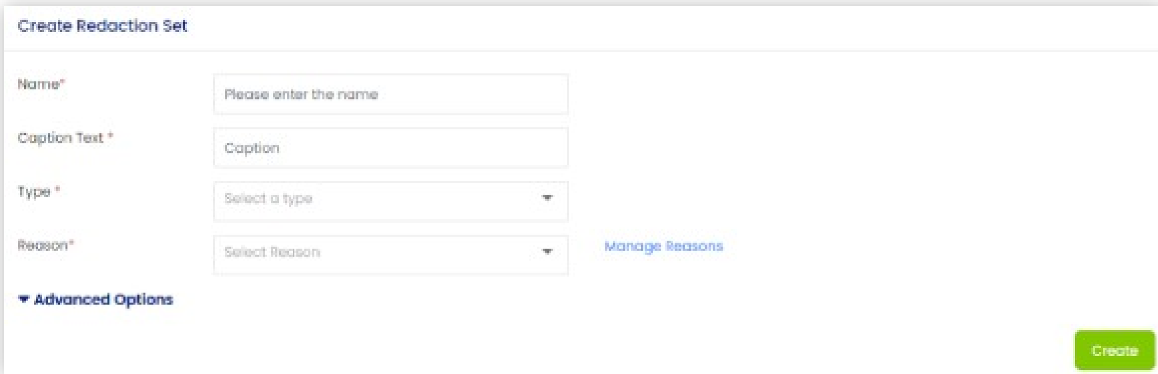
12.6.1 Create Redaction Set

Admin Settings > Case Admin > Redaction Set > Create

Click the drop-down arrow next to your name in the top right corner. 2.
Click Admin Settings > Case Admin > Redaction Set > Create.
OR

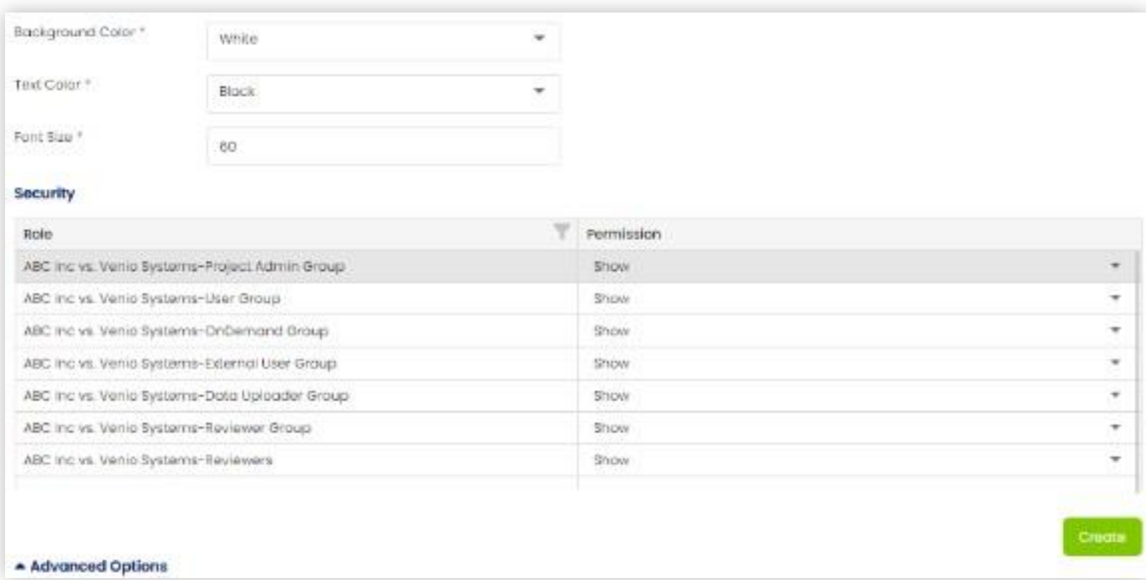
Click Admin Settings > Case Admin > click the Create Redaction Set + button.

The Create Redaction Set dialog displays.



Enter the Redaction Set Name.
Enter the Caption Text to be shown on the redactions.
Select a Type from the drop-down list – Highlight or Solid Rectangle.
Select a Reason from the drop-down list.
OPTIONAL: Use the Manage Reasons link to make changes to the Reasons.
OPTIONAL: Click the Advanced Options link.

The Advanced Options are displayed.



- Select the Background Color from the drop-down list – White or Black.
- Select the Text Color from the drop-down list – Black or White.

- Set the Font Size for the redaction text.
- Designate the access rights for each Role within the case – Show or Hide.

Click the Create button.

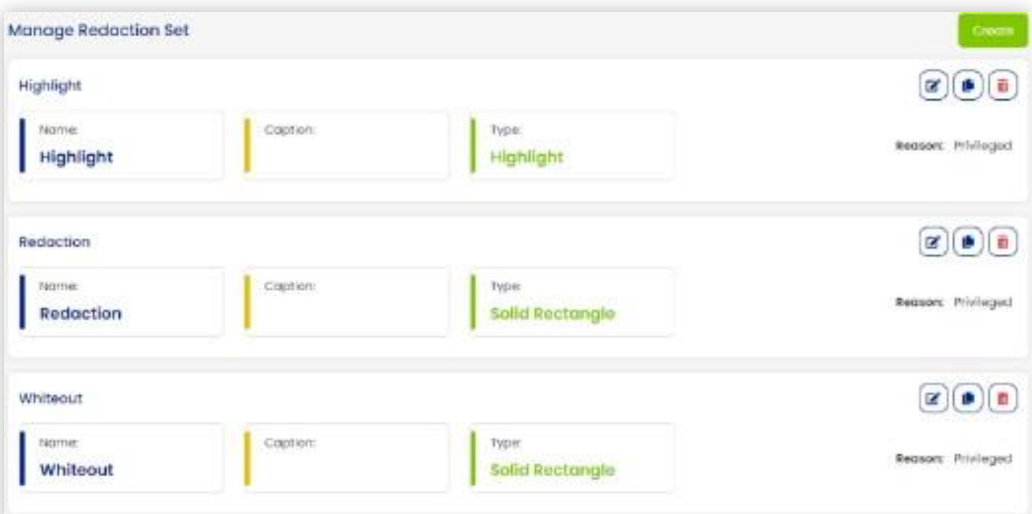
The Redaction Set is created for the selected case.

12.6.2 Manage Redaction Sets

Admin Settings > Case Admin > Redaction Set > Manage

Click the drop-down arrow next to your name in the top right corner. 2.
Click Admin Settings > Case Admin > Redaction Set > Manage.
OR
Click Admin Settings > Case Admin > click the Manage Redaction Set button.

The Manage Redaction Set dialog displays redaction set cards with options to Edit, Clone, or Delete.



Use the buttons on the Redaction Set cards to:

- Edit
- Clone
- Delete

12.7 Custom Field Admin

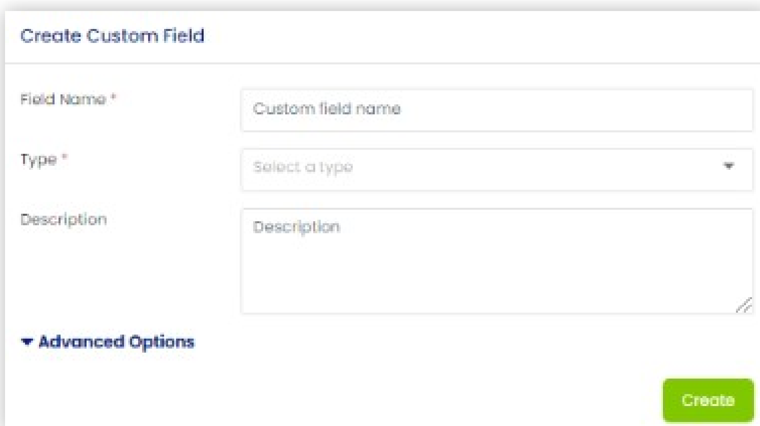
Within Case Admin, you may create or manage custom fields. You may also adjust the security settings to control which fields are visible for Roles within VOD.

12.7.1 Create Custom Field

Admin Settings > Case Admin > Field > Create

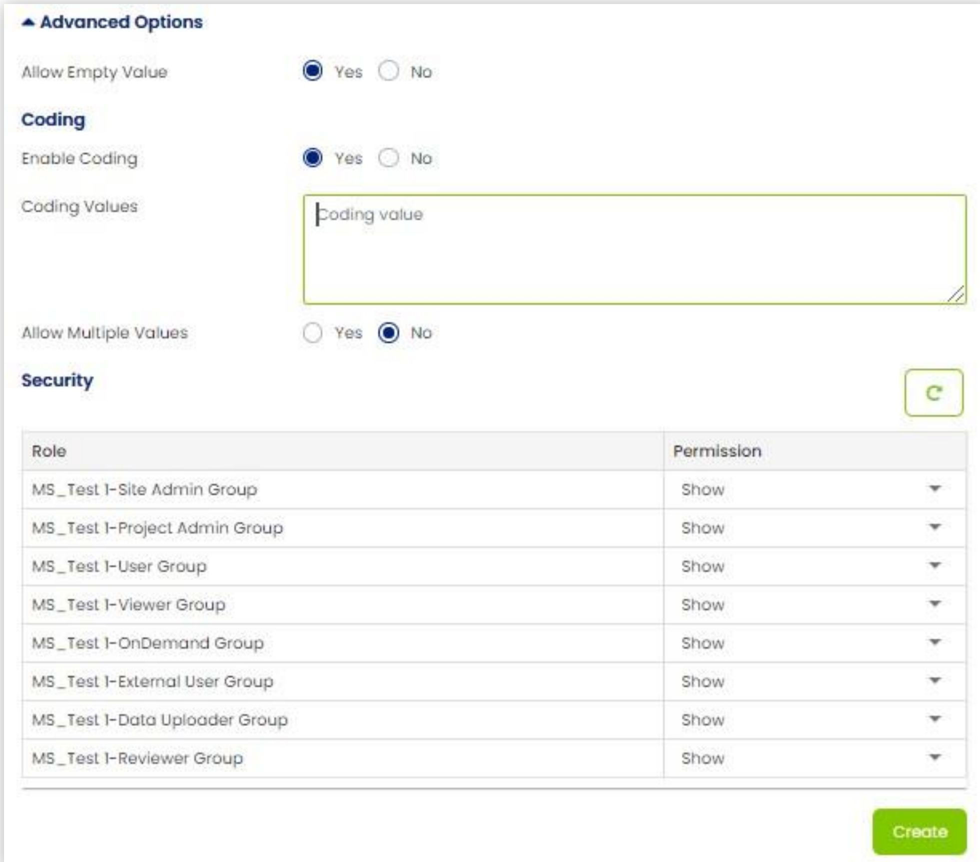
Click the drop-down arrow next to your name in the top right corner.
Click Admin Settings > Case Admin > Field > Create.
OR
Click Admin Settings > Case Admin > click the Create Field button.

The Create Custom Field dialog displays.



Enter the Field Name.
Select the field Type from the drop-down list.
OPTIONAL: Enter a Description for the field.
OPTIONAL: Click the Advanced Options link.

The Advanced Options are displayed.



- Select the Yes or No radio button for Allow Empty Value.
- Select the Yes or No radio button to Enable Coding.
- Enter Coding Values to provide a list of items to select from for coding.
- Select the Yes or No radio button to Allow Multiple Values.
- Designate the access rights for each Role within the case – Show or Hide.

Click the Create button.

The Custom Field is created for the selected case.

12.7.2 Manage Custom Fields

Admin Settings > Case Admin > Field > Manage

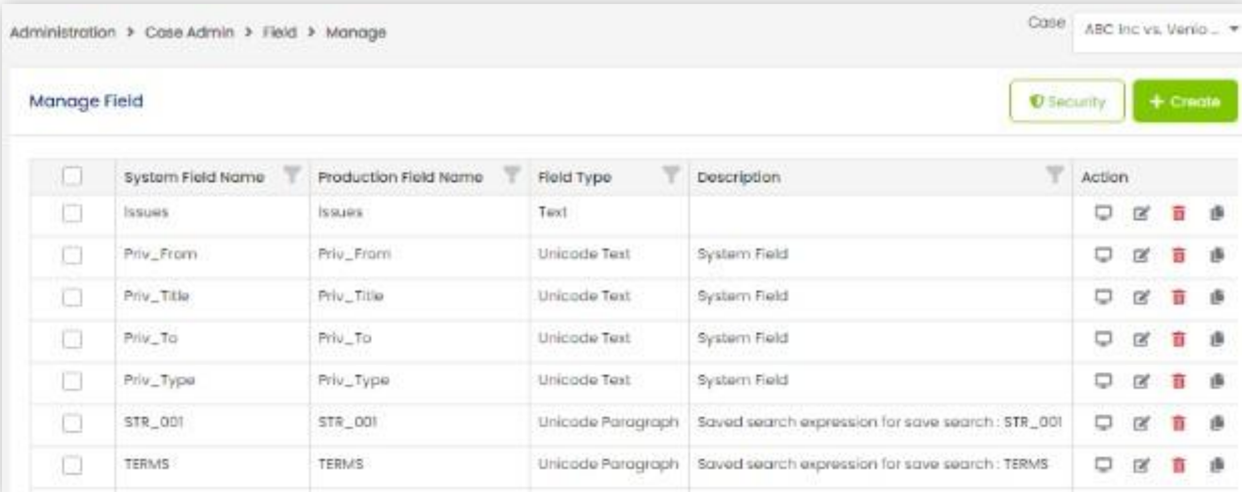
Click the drop-down arrow next to your name in the top right corner. 2. Click Admin Settings > Case Admin > Field > Manage.

OR

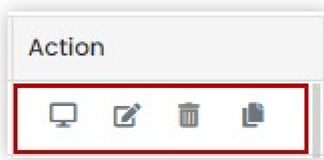
Click Admin Settings > Case Admin > click the Manage Custom Field button.

The Manage Field dialog displays a list of custom fields with options to View, Edit, Delete, or Clone.

NOTE: The four Priv fields are created by default within VenioOne and are used to create a Privilege Log Report.



Use the buttons adjacent to a field to:

	View	
	Edit	
	Delete	
	Clone	

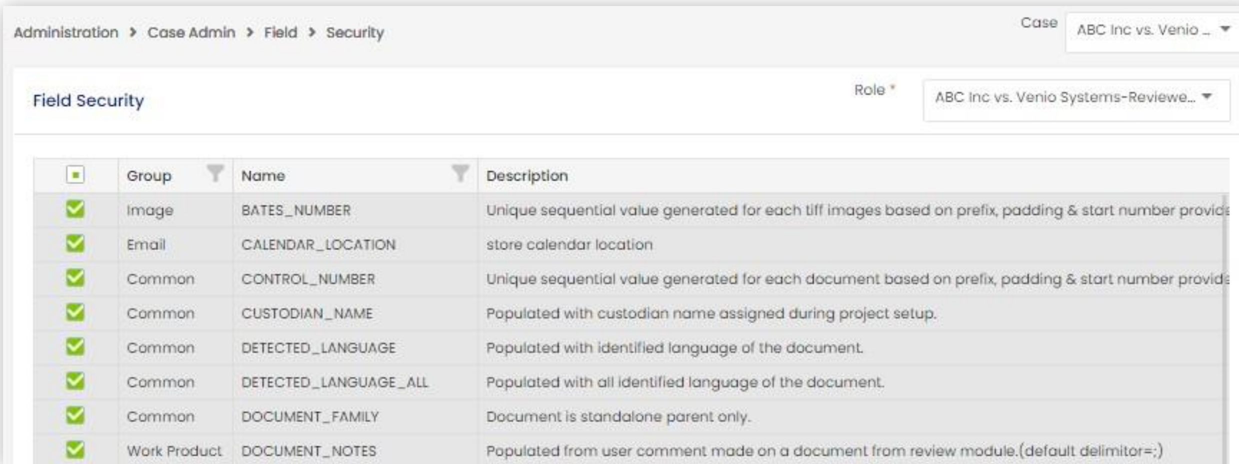
NOTE: Default entity fields may not be deleted. Those fields will have a gray Delete icon.

12.7.3 Field Security

Admin Settings > Case Admin > Field > Security

Click the drop-down arrow next to your name in the top right corner. 2. Click Admin Settings > Case Admin > Field > Security.

The Field Security dialog displays a list of fields with a Role drop-down list to view the fields available to each role.



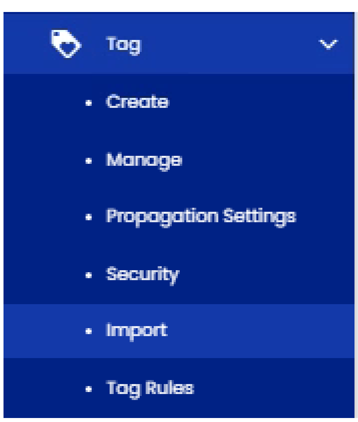
Select a Role using the drop-down list.
Check any fields that should be available to the selected role.
Click the Save button to save any changes.

Note

- When the user group has right to "Allow to edit field security" VoD lists all the fields to manage.
- By default, site admin, project admin and on demand admin have "Allow to edit field security" right assigned.

12.8 Tag Admin

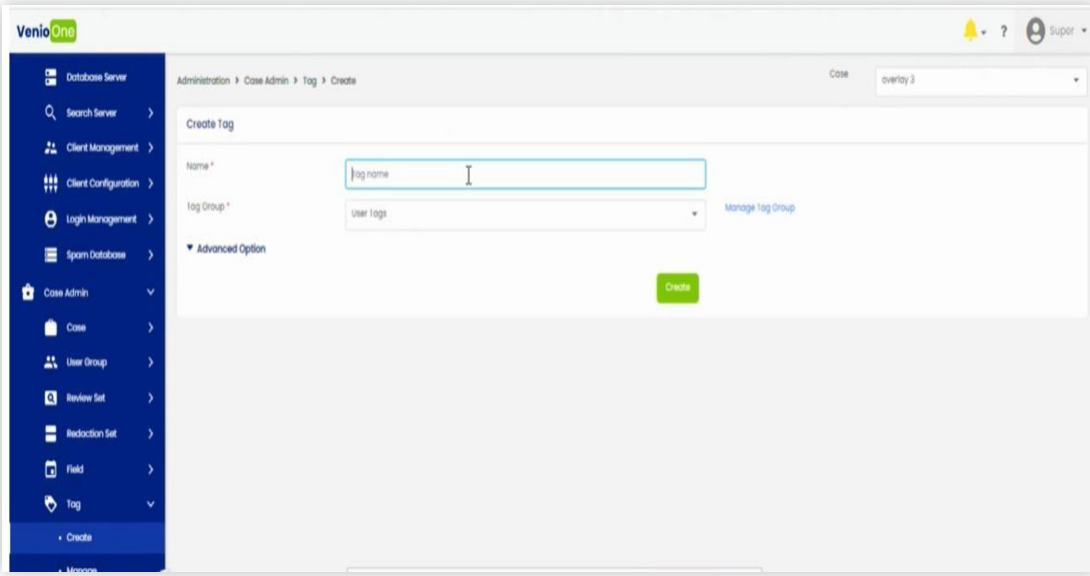
In the Tag module, you may create Tags, assign read/write permissions, and set the Tag Propagation scope for use throughout your entire project.



12.8.1 Create Tag

Admin Settings > Case Admin > Tag > Create

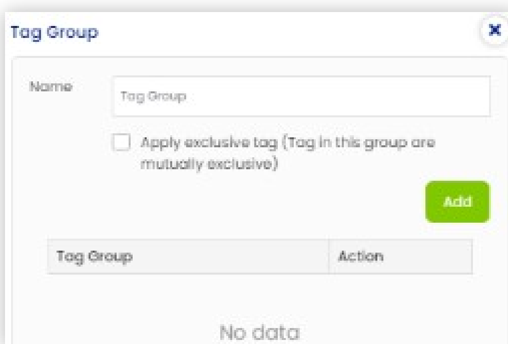
You may create new tag groups and tags or search for existing ones within a project. Tags and tag groups created in VOD can also be edited/deleted from the VenioOne Desktop Console.



Enter the Name of the tag

Select Tag Group from the drop-down list.

NOTE: Use the Manage Tag Group link to add Tag Groups.



Click Advanced Option

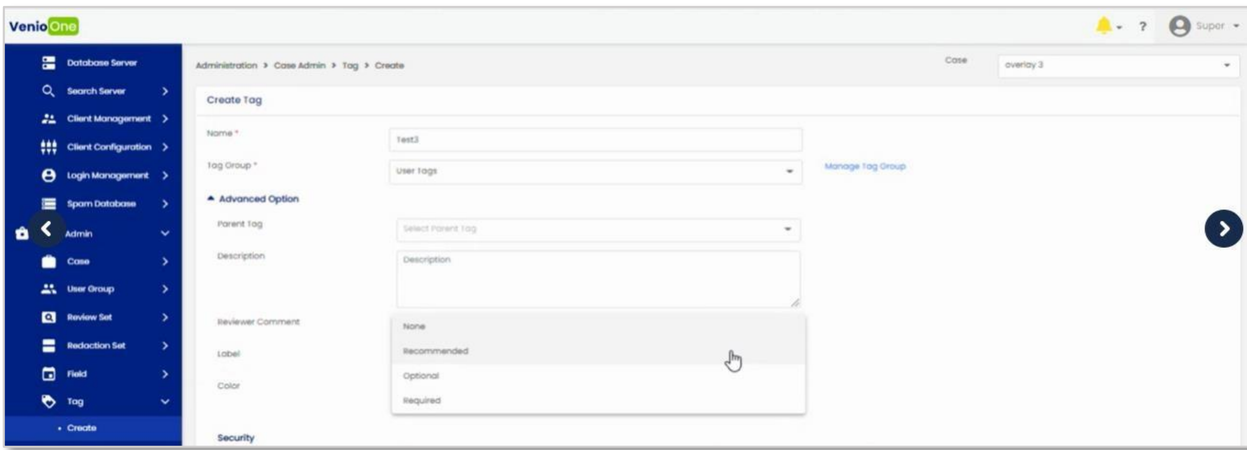
If applicable, select a Parent Tag from the drop-down list.

NOTE: Do not select a Parent Tag if the new tag to be created is a parent tag itself.

OPTIONAL: Enter Description.

Under Reviewer Comment, select from the following options from the drop-down menu:

- Recommended: User may want to enter comments in the field for the selected tag.
- Optional: Users can skip entering the comment for the selected tag.
- Required: User must enter a comment for the selected tag before updating.



Enter a reason in the Label field.

Select a Color for the tag.

OPTIONAL: Click the Advanced Options link to set access rights for the Roles within the project. The options are:

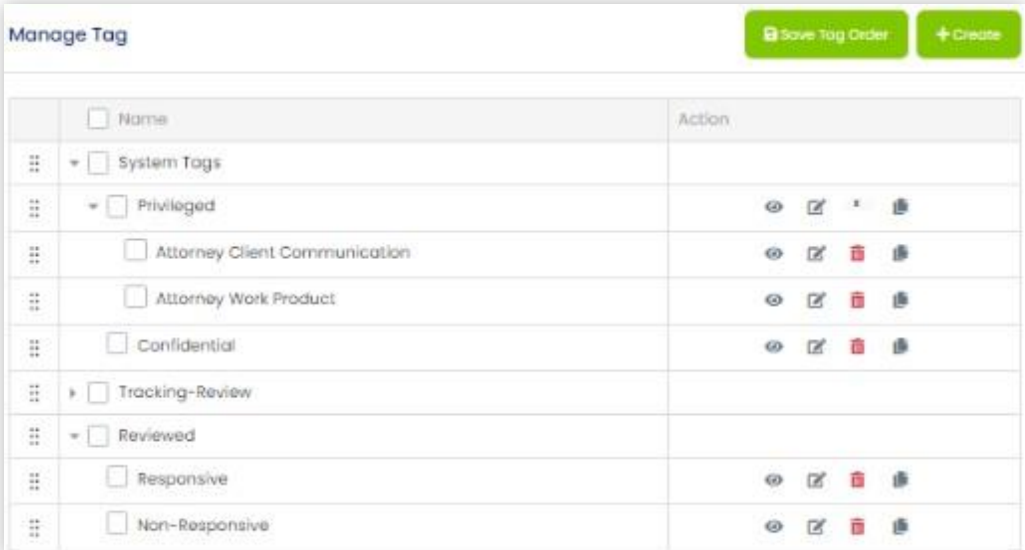
- Read/Write: Users may view, tag and untag the tag(s).
- Read: Users may view the tag(s), but tagging is disabled.
- None: Users will not be able to see the tag.

Click the Create button to create the tag.

12.8.2 Manage Tags

Admin Settings > Case Admin >Tag > Manage

The Manage Tag module can be used to organize tags and tag groups. Buttons are available to View, Edit, Delete and Clone tags.



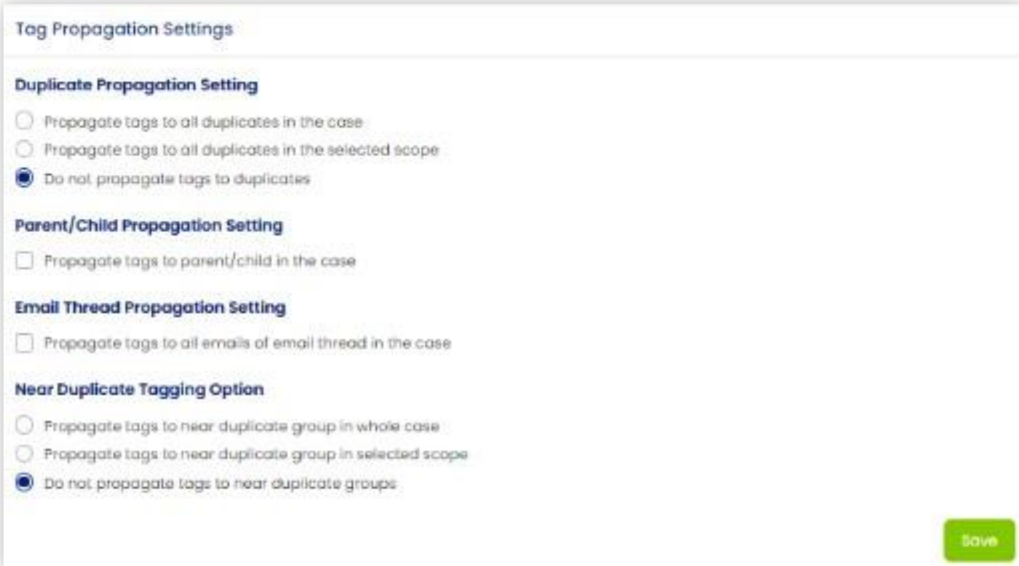
- Click-and-drag the button at the beginning of a row to rearrange the order of the tags.
- Click the arrow next to a Parent Tag to expand the group of tags.
- Click the View button to see the settings for a tag · Click the Edit button to make changes to the tag.
- Click the Delete button to delete a tag.
- Click the Clone button to create a new tag based on the selected tag.
- After making changes be sure to click the Save Tag Order button to save your changes.

12.8.3 Propagation Settings

Admin Settings > Case Admin >Tag > Propagation Settings

You may set the Tag Propagation scope uniformly throughout the VOD project to control how tags are propagated to duplicates, parent/child files, and email threads.

By default, the settings for a newly created project do not include any tag propagation (as shown below).



You may change the settings as required and then click the Save button to apply the changes within the selected project.

- Duplicate Propagation Setting
  - Propagate tags to all duplicates in the case: Tags all duplicate documents in the case.
  - Propagate tags to all duplicates in the selected scope: Tags all duplicate documents in the selected scope.
  - Do not propagate tags to duplicates: Does not tag duplicate documents.
- Parent/Child Set Tagging Setting
  - Propagate tags to parent/child in the case: Tags parent and child documents in the case.
- Email Thread Propagation Setting
  - Propagate tags to all emails of email thread in the case: Tags all email documents in an Email Thread in the case.

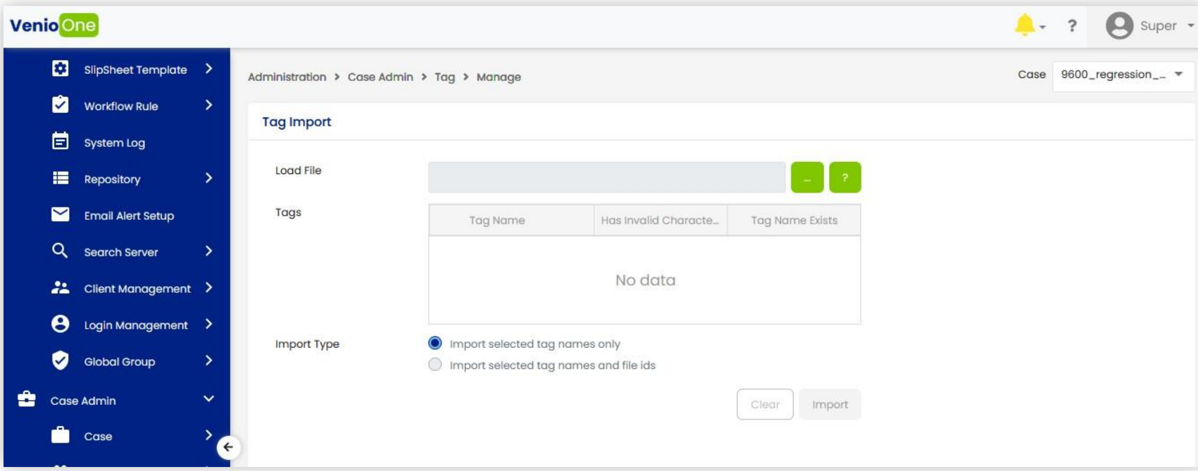
12.8.4 Tag Import

Tag import feature is used to attach multiple tags at a time.

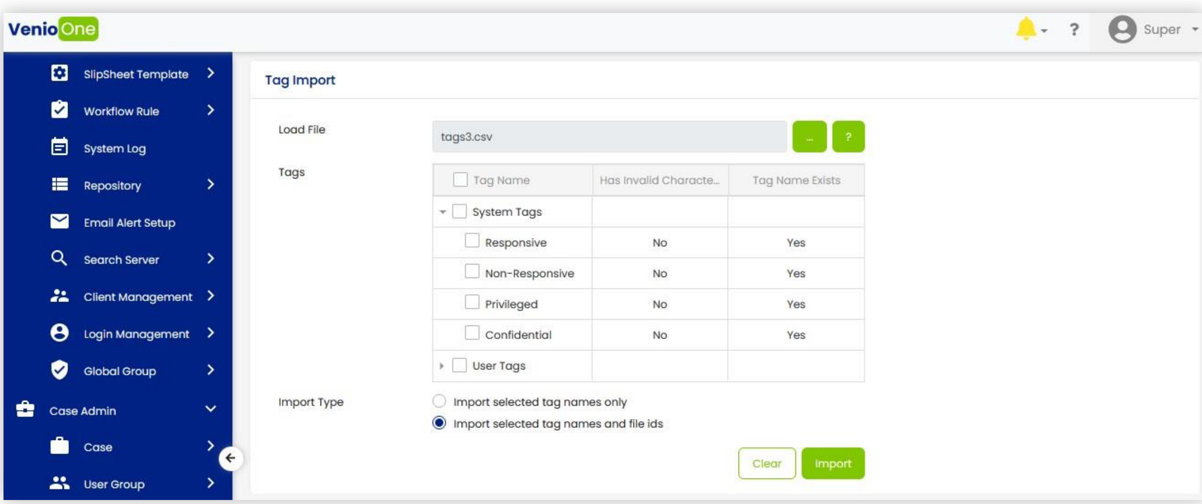
To import multiple tags at a time:

1. Navigate to Administration > Case Admin > Tag > Manage > Import.

   The Tag Import screen appears.



2. Browse for the tag file by clicking on the browse option adjacent to the Load File text box. Once the tags are loaded, the tags are displayed in the Tags table:

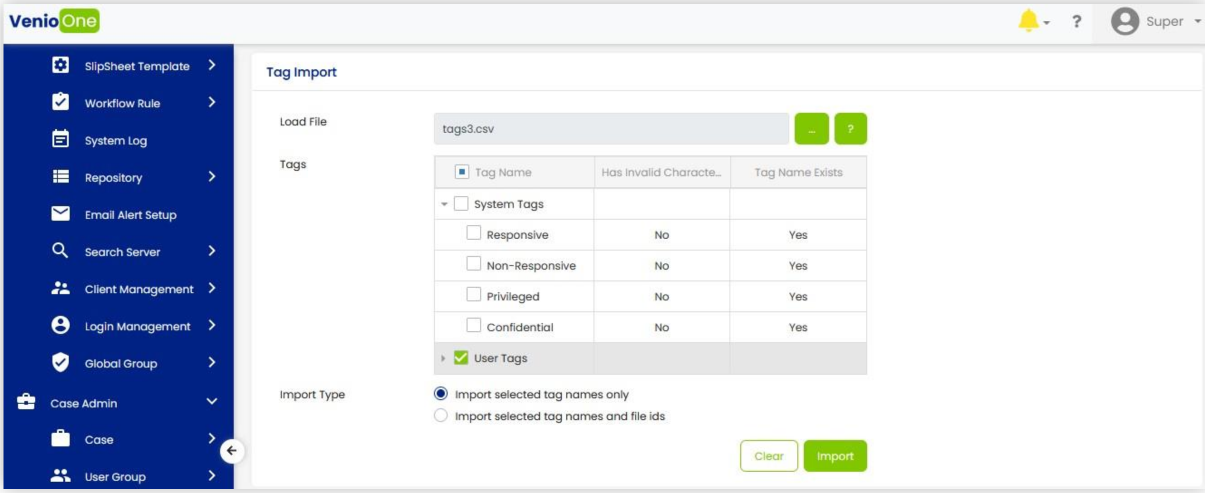


Select the tags by selecting the corresponding checkboxes in the tags list.

Using the Import Type, you can import tag names in two ways:

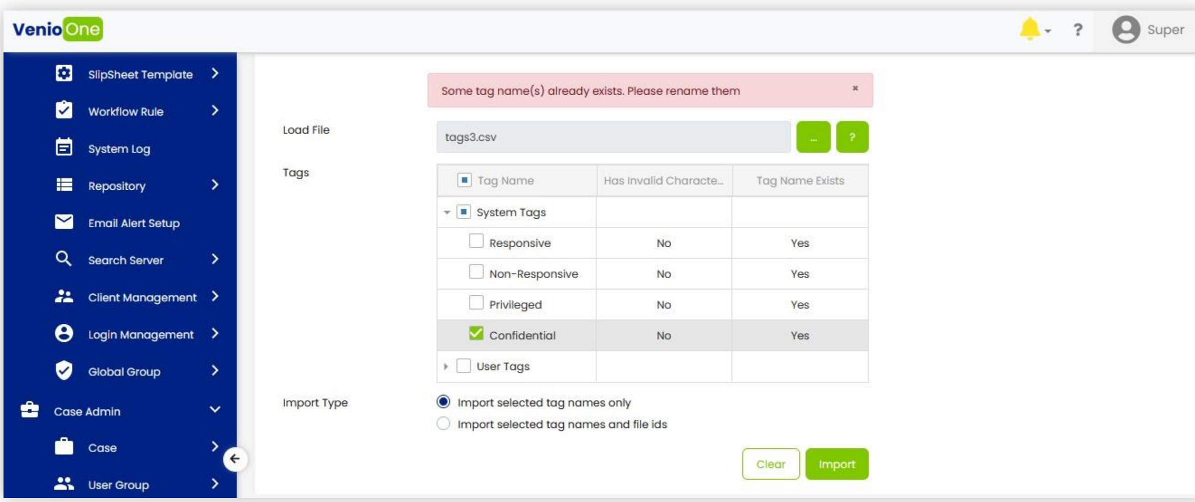
- Import selected tag names only
- Import selected tag names and file ids

a) Select Import selected tag names only and click Import.

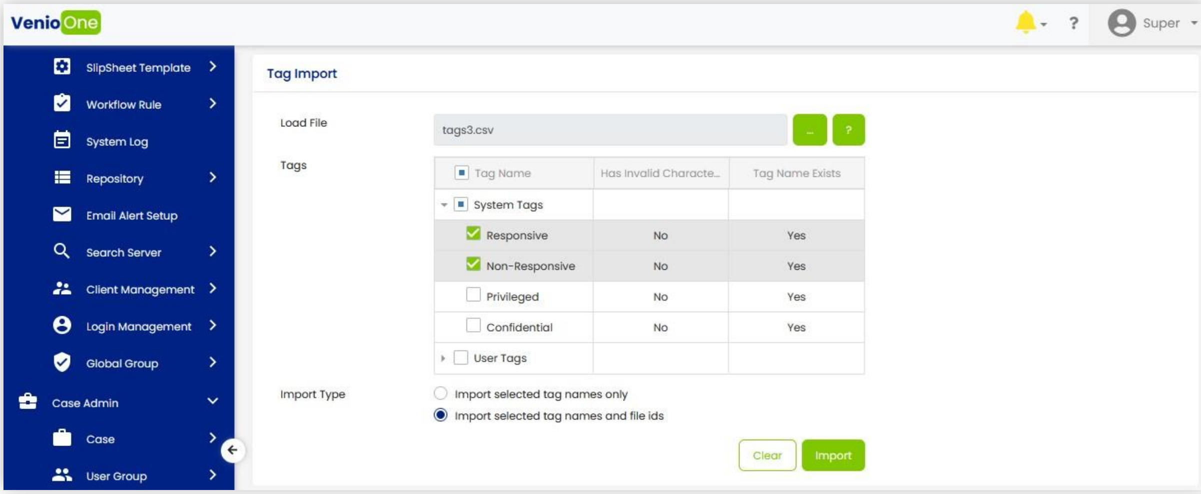


When the tag is imported, the following screen appears. Click OK to go back to Tag Import screen.

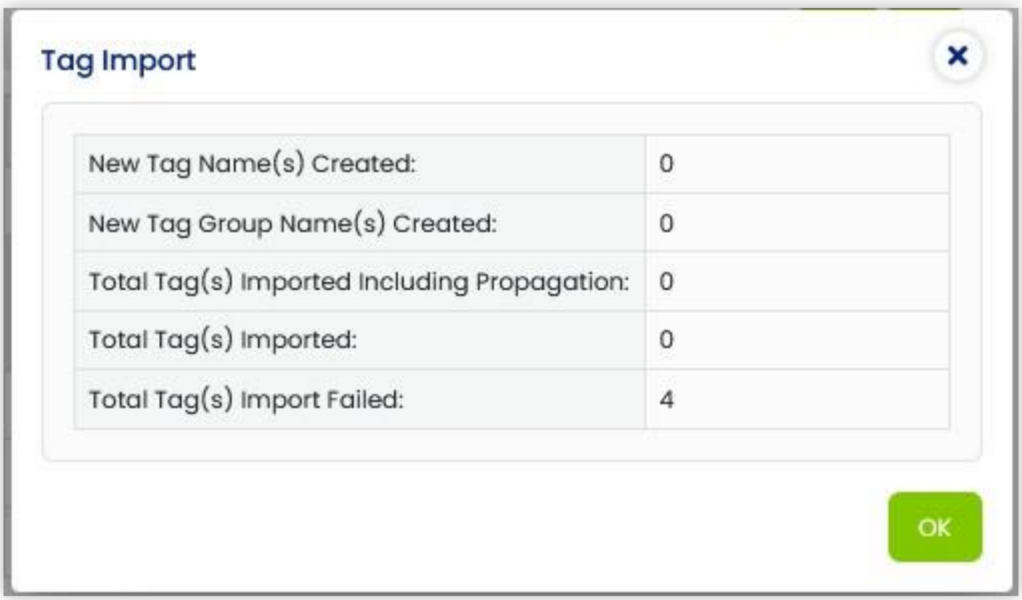
If you are importing an existing tag, the following message appears in the Tag Import screen.



b) Select Import selected tag names and file ids and click Import.



If you have already imported the tags, the following table appears:


Tag Import

New Tag Name(s) Created:	0
New Tag Group Name(s) Created:	0
Total Tag(s) Imported Including Propagation:	0
Total Tag(s) Imported:	0
Total Tag(s) Import Failed:	4

OK

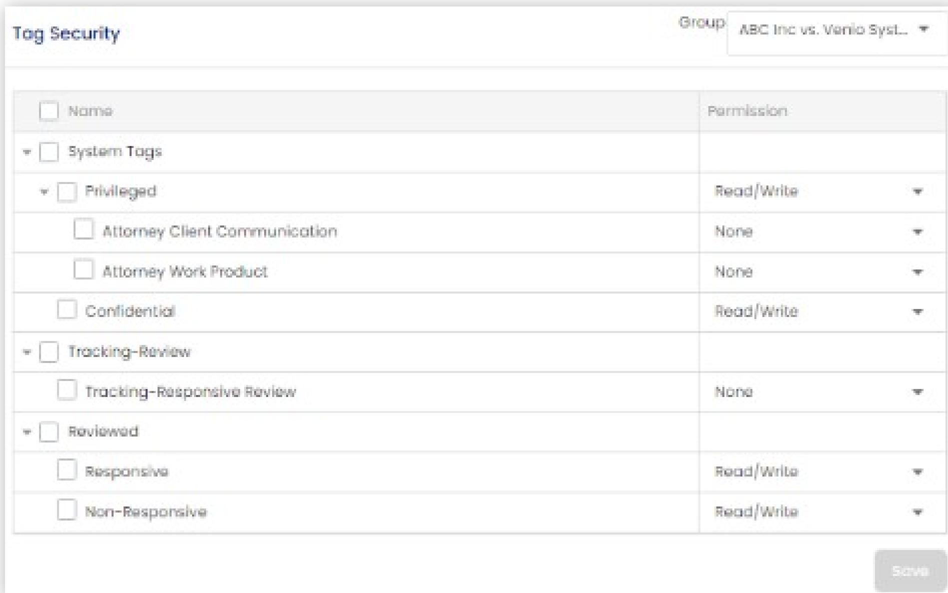
12.8.5 Tag Security

Admin Settings > Case Admin >Tag > Security

Only those with Admin level rights can set Tag Security permissions. The tag security options are applied to those individuals within a selected project user group, so select the Group from the drop-down list and then set the access rights using the drop-down lists for each tag. When done, click the Save button to save your changes.

The permissions for a tag in tag security are:

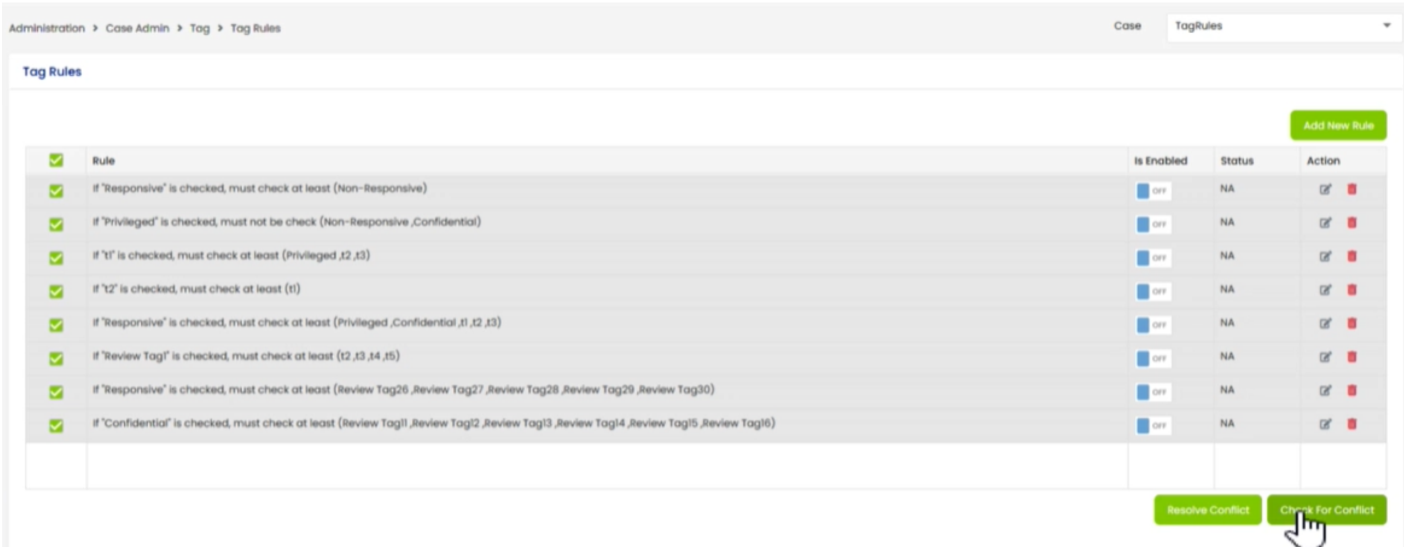
- Read/Write: Users may view, tag and untag the tag(s).
- Read: Users may view the tag(s), but tagging is disabled.
- None: Users will not be able to see the tag.



12.8.5 Tag Security

Admin Settings > Case Admin >Tag > Tag Rules

Only those with Admin level rights can set Tag Rules. You can add tag rules using Add New Rule button. For each case, you can assign tag rules by selecting the tag rules and click on Check for Conflict button. Once it is checked, then turn on the Is Enabled column which will apply the tag rules.



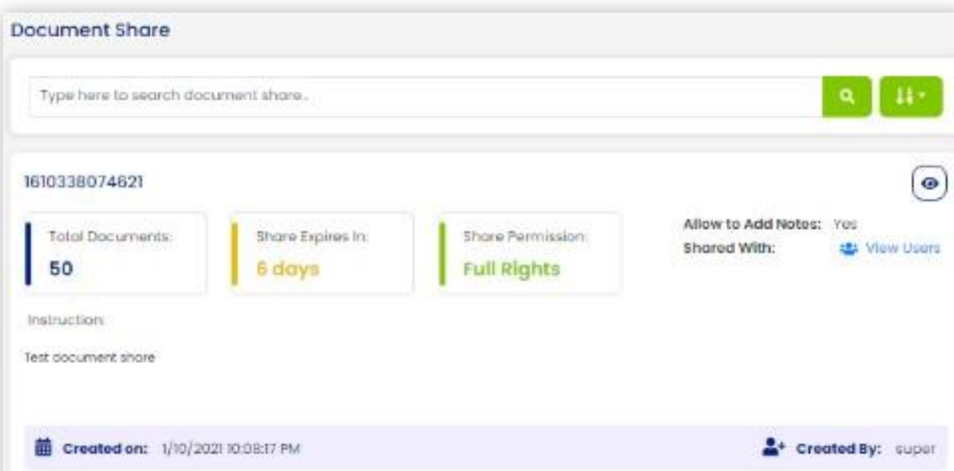
12.9 Document Share Admin

Admin Settings > Case Admin >Document Share > Manage

In this module, you can view documents sets shared to/by users within the project.

Click the View Users link to see who the documents were share with.

Click the View button to open the list of shared documents in the Review Dashboard.



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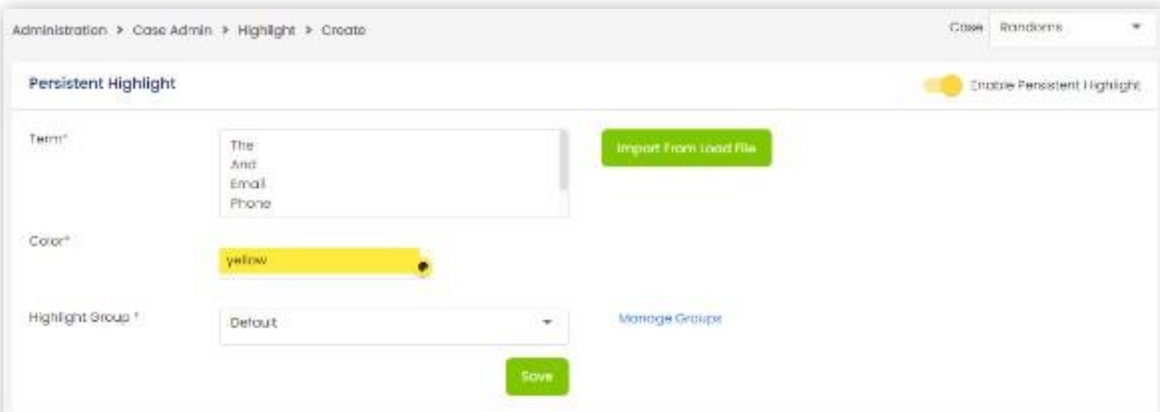
12.10 Highlight Admin

Persistent highlighting can be created to highlight terms within the files in a project to make it easier for reviewers to identify important files.

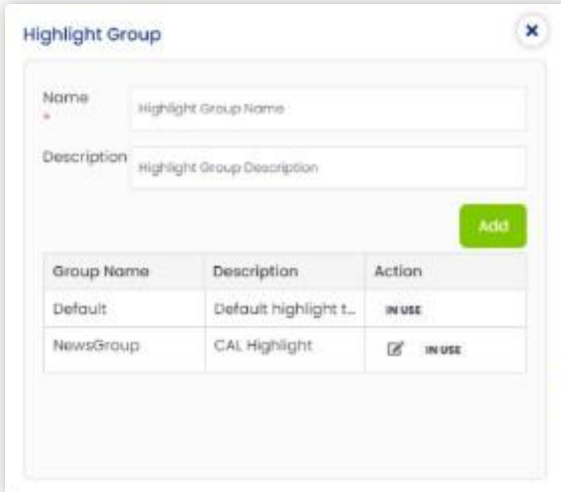
12.10.1 Create Highlight

Admin Settings > Case Admin >Highlight > Create

Adding highlighting to terms within projects is easy. Simply enter the Term and Color for the highlighting, select the Highlight Group, turn on Enable Persistent Highlight, and then click the Save button.



To add a Highlight Group, click the Manage Group link. In the Highlight Group dialog, input the Name and Description, and then click the Add button to add the group.

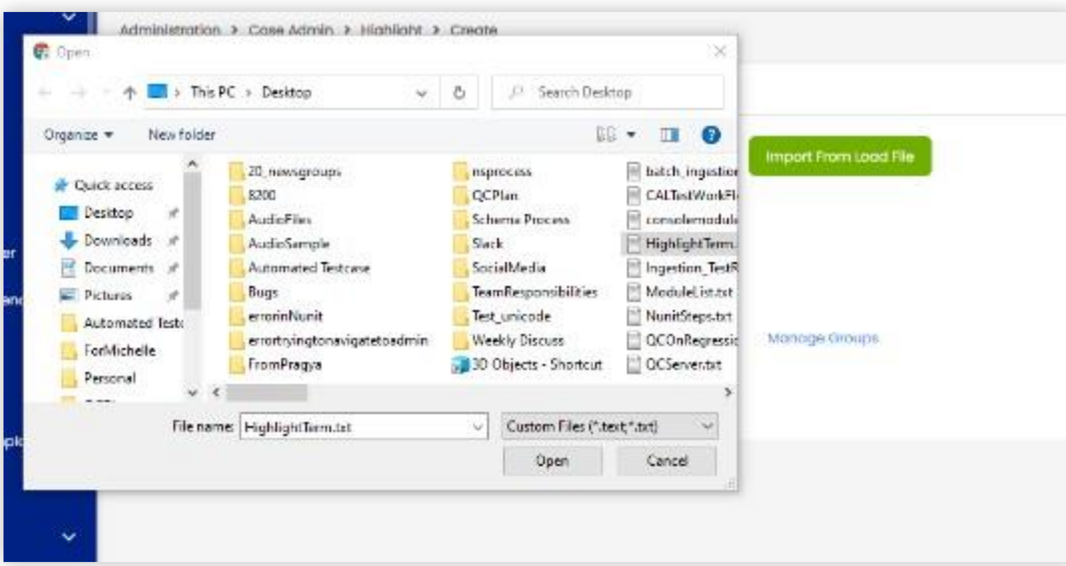


12.10.2 Import Highlights from a Load File

Admin Settings > Case Admin >Highlight > Create

Terms to be highlighted can also be set by importing a.txt load file containing the terms. Each term should be on a separate line in the load file.

Click the Import from Load File button on the Persistent Highlight dialog and browse to the file containing the terms. After the terms have loaded, you may select the Color for each term. Be sure to set Enable Persistent Highlight and click the Save button to save your changes.



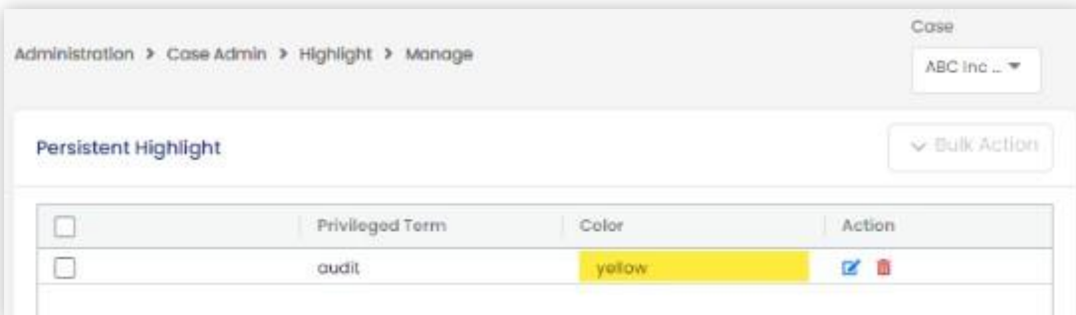
12.10.3 Manage Highlights

Admin Settings > Case Admin >Highlight > Manage

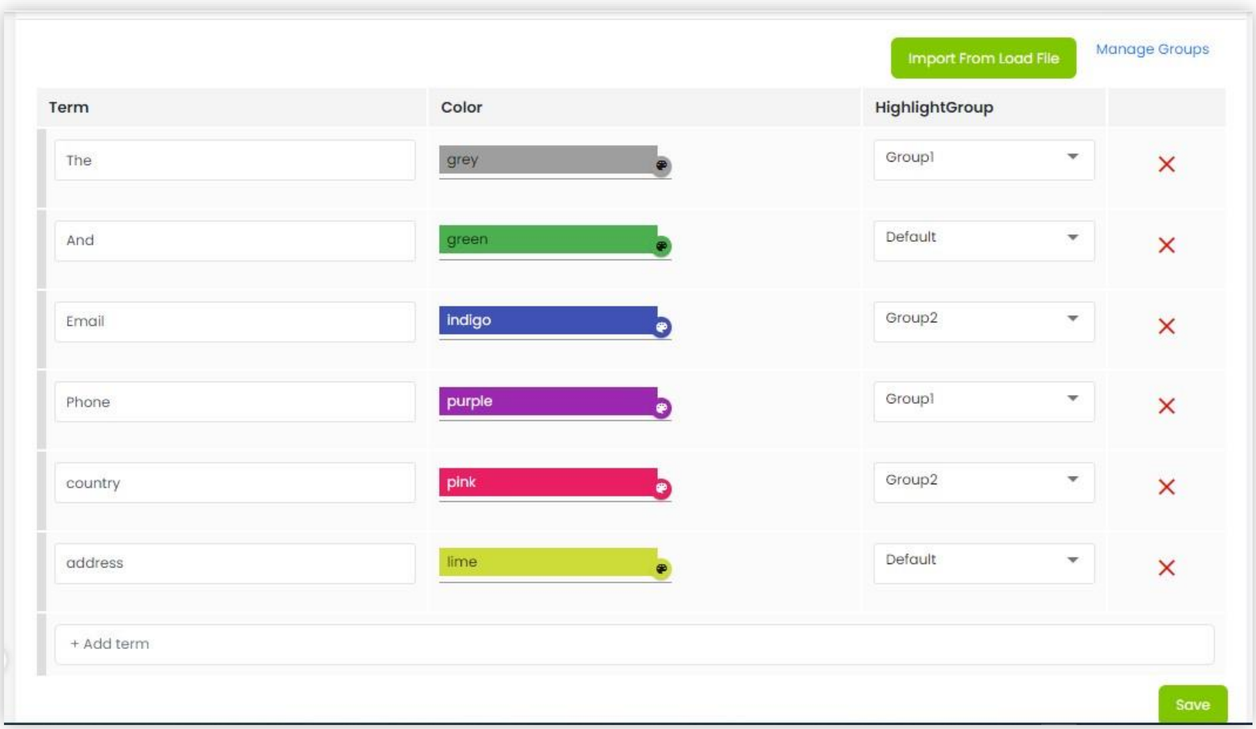
This module lists any terms that are being highlighted within the files in the project and included buttons to Edit and Delete the highlights.

There is a Bulk Action drop-down list at the top right. After selecting multiple highlights using the adjacent check boxes, use the drop-down to Edit or Delete multiple items.

The Bulk Action drop-down list also helps when the user creates multiple groups and loads multiple terms. When they load, user can select multiple groups for Bulk action. The user can select from multiple color options. Once done, the user can click Save and close.



Users can also assign terms to a group. Once terms are loaded you may select a highlight group.



12.11 Sampling

You generate samples based on a variety of criteria to perform quality control, strategically analyze data, or evaluate collection, searching, culling, and Venio Assisted Review (VAR) strategies.

Many teams use sampling during TOA to quickly get a look at initial collections, informing further custodian and data source identification.

12.11.1 Create Sample

Admin Settings > Case Admin >Sample > Create

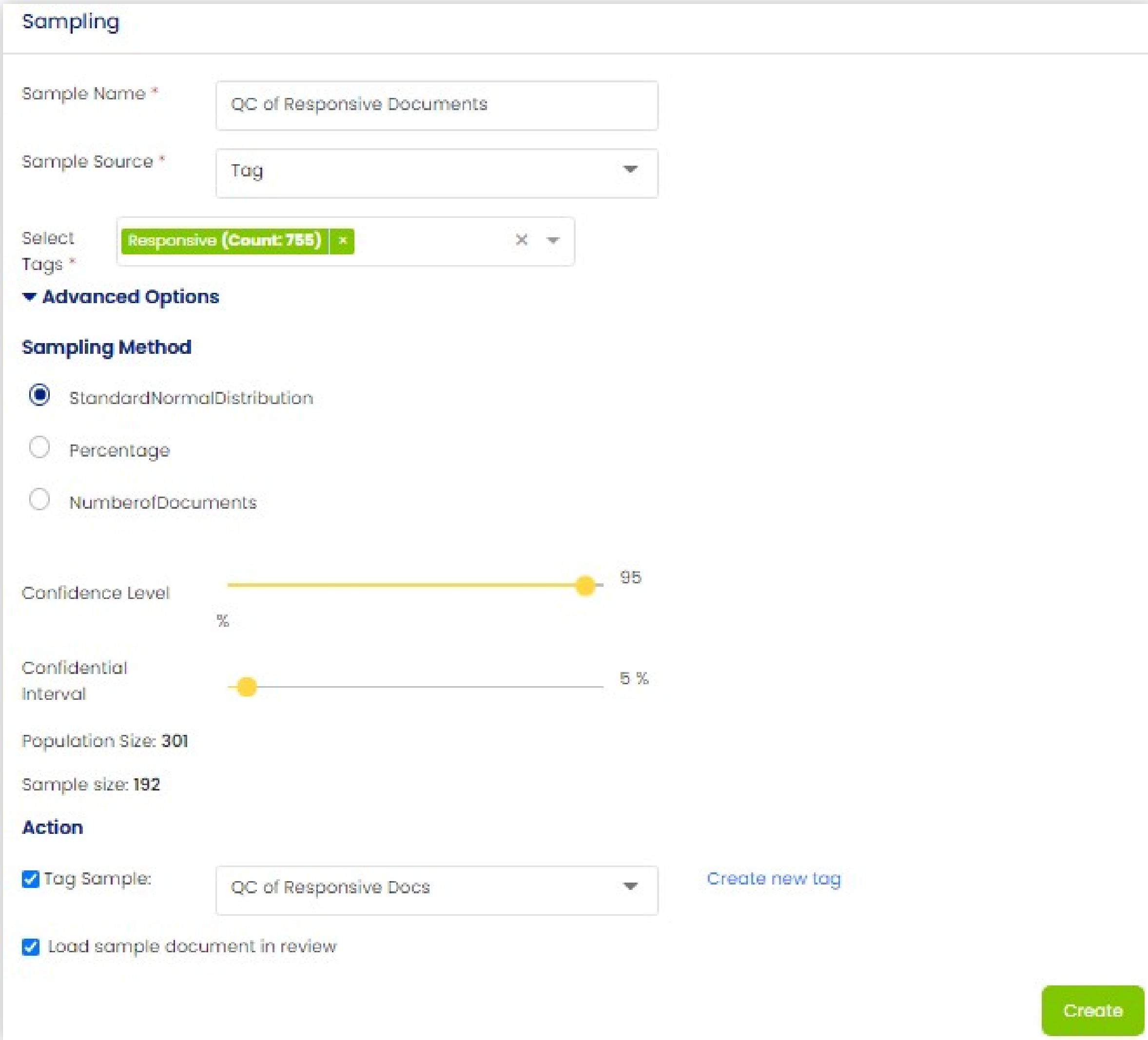
Samples may be created from Tags or Saved Searches. Documents that are part of samples may be tagged to easily identify them and enable additional workflows. There is even an option to load the sample into the Review Dashboard at the time of creation.

To create a sample, follow the steps below:

Click the drop-down arrow next to your name in the top right corner.

Click Admin Settings > Case Admin >Sample > Create.

The Sampling dialog displays.



Enter the Sample Name.
Select the Sample Source from the drop-down list – Tag or Saved Search.
Select the Sampling Method using the radio buttons. Choose from:

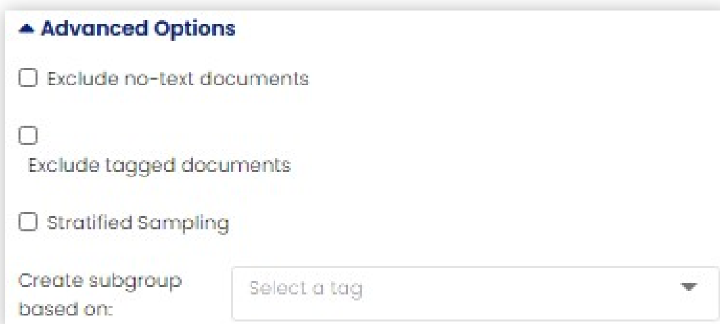
- Standard Normal Distribution - Generates a representative sample of the scoped population. When this sample method is selected, you may modify the following settings:
  - Confidence Level
  - Confidence interval
- Percentage of Population - Finite percentage of the scoped population.
- Number of Documents - Specific number of documents that are selected from the scoped population.

OPTIONAL: Check the box to Tag Sample and then select the Tag from the drop-down list or use the Create new tag link to create a new tag.
OPTIONAL: Check the box to Load sample documents in review.
Click the Create button to create the sample.

12.11.1.1 Advanced Options

If needed, you may expand the Advanced Options using the Advanced Options link, which includes check boxes to:

- Exclude no-text documents
- Exclude tagged documents
- Enable Stratified Sampling to create a subgroup based on either:
  - 0 Reviewer
  - ○ FileType



12.11.2 Manage Samples

Admin Settings > Case Admin >Sample > Manage

To manage samples within a project, follow the steps below:

Click the drop-down arrow next to your name in the top right corner.
Click Admin Settings > Case Admin >Sample > Manage.

The Sampling dialog displays a list of sample cards for samples within the project.

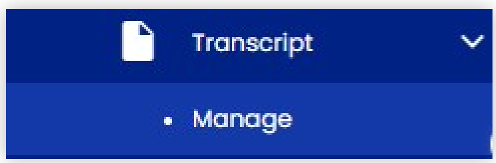
Use the buttons on a sample card to take the following actions:

- Clone
- Edit
- View

- Delete

12.12 Transcript Management

Within Case Admin, you may manage transcripts that have been loaded in VenioOne.

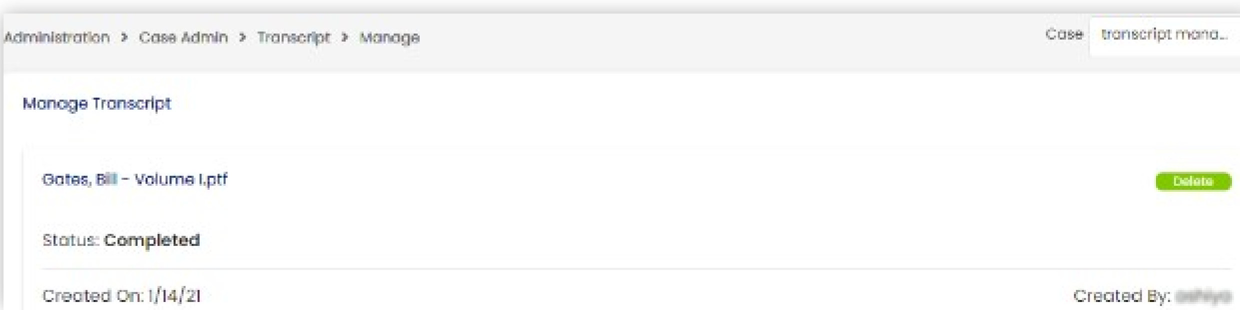


12.12.1 Manage Transcripts

Admin Settings > Case Admin > Transcript > Manage

1. Click the drop-down arrow next to your name in the top right corner.
2. Click Admin Settings > Case Admin > Transcript > Manage.

The Transcript Management dialog displays cards for the Transcript files in the selected case.



3. Use the Case drop-down list (upper right corner) to view other cases. Use the Delete button to delete the transcript.

NOTE: Only those with rights to do so may delete transcripts.

12.13 Custodian Admin

Within VOD Custodians can be created at the time data is uploaded or within the Case Admin settings.

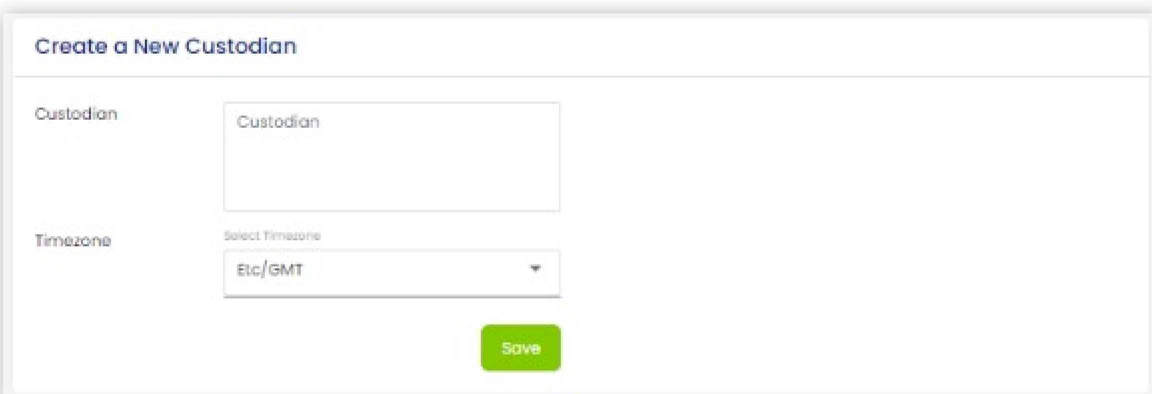
12.13.1 Create Custodian

Admin Settings > Case Admin > Custodian > Create

To create a custodian, follow the steps below:

Click the drop-down arrow next to your name in the top right corner.
Click Admin Settings > Case Admin >Custodian > Create.

The Create a New Custodian dialog displays.



Enter the Custodian Name.
Set the Timezone for the custodian.
Click the Save button.

12.13.2 Manage Custodians

Admin Settings > Case Admin > Custodian > Manage

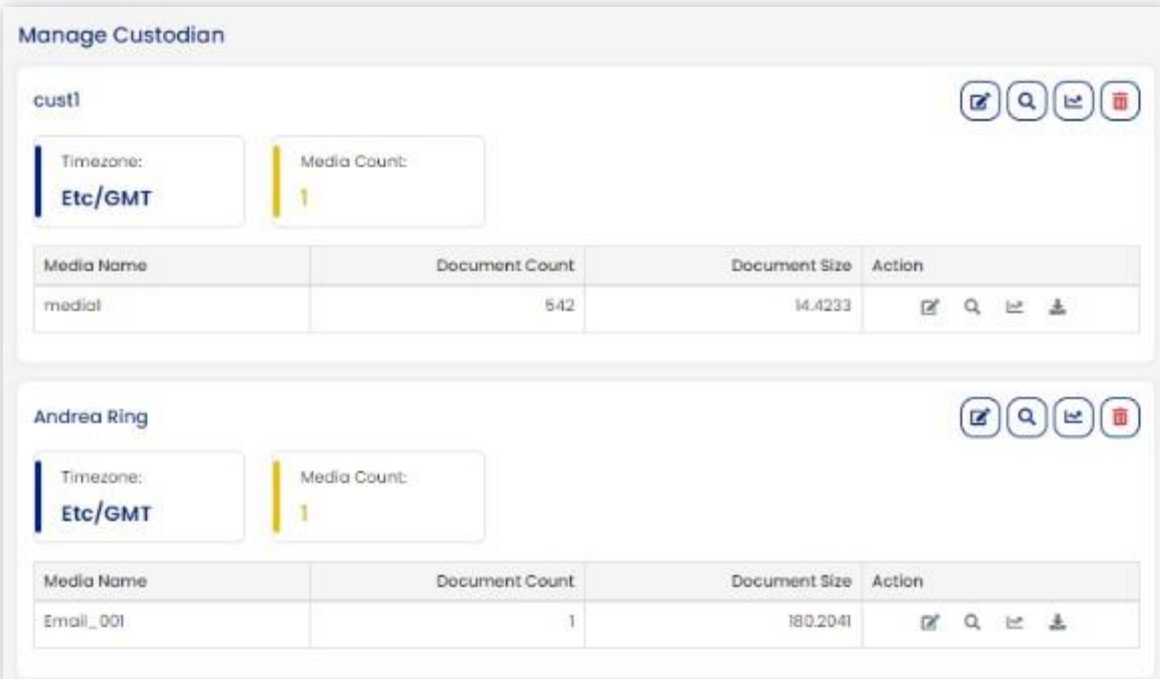
To manage custodians, follow the steps below:

Click the drop-down arrow next to your name in the top right corner.
Click Admin Settings > Case Admin >Custodian > Manage.

The Manage Custodian dialog displays Custodian cards.

Use the buttons to take the following actions:

- Edit the custodian
- Delete the custodian
- Send the custodian's documents to the Review Dashboard
- Send the custodian's documents to the Analyze Dashboard.



12.13.2.1 Change Priority

12.14 Entity Admin

Entity custom fields can be created within the Case Admin settings.

12.14.1 Intro to Entity Extraction and Entity Fields

Entity extraction, also known as entity identification, entity chunking, and named entity recognition (NER), is the act of locating and classifying mentions of an entity in a piece of text. This is done using a system of predefined categories, which may include anything from people or organizations to dates, times, and monetary values.

The entity extraction process adds structure and additional metadata information to previously unstructured text. It allows machine-learning algorithms, such as VAR/CAL, to identify mentions of certain entities within text alongside the other metadata for the files.

Entity Fields are used by the entity extraction process to identify patterns and personal information that people normally do not share with other people, such as Social Security number, personal ID provided by an employer or government agency, birth date, etc. The identified PII is then extracted to an Entity Field (or fields) and grouped together, so it can be used to easily analyze, search, redact, and filter for review.

The extracted entity data can be output in a single field with a separator for multiple pieces of different types of data e.g., Name/Title or Date/ Time, or divided into individual fields for each piece of data e.g., Name, Title, Date, Time.

12.14.2 Working with Entity Fields

The list of default Entity Fields added in VenioOne projects is listed in Section 12.14.5 below

Users also have an option to add custom entity fields in the same way they create other Custom Fields. Users can view and create a report of the PII information being extracted and the total document counts. The entity field data can also be used for easily tagging or foldering documents as required.

Additional Entity Field functionality will be added in future releases of the VenioOne platform.

12.14.3 Entity Extraction Process

When uploading documents from VOD, one of the Advanced Options will automatically queue the files for entity extraction using VenioOne's built-in Entity Fields or Custom Entity Fields in the project. If this process is not run during ingestion, it can be run from the Other Options within the Document List in the Review Dashboard of VOD.

12.14.4 Creating Custom Entity Fields

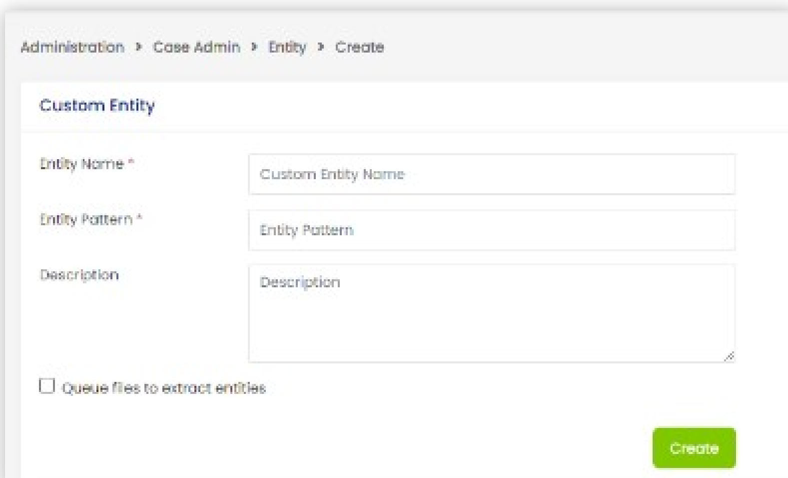
If you have rights to do so, you may create Custom Entity Fields within VOD. Instructions on how to do so are included below.

Entity fields will be displayed with other Custom Fields within the Field Management dialogs within both the Desktop Console and VOD.
Admin Settings > Case Admin > Entity > Create

To create an entity custom field, follow the steps below:

Click the drop-down arrow next to your name in the top right corner.
Click Admin Settings > Case Admin >Entity > Create.

The Create a New Custom Entity dialog displays.



Enter the Custom Entity Name.
Enter the Entity Pattern.
If desired, enter a Description.
Click the Create button.

12.14.5 Default Entity Fields

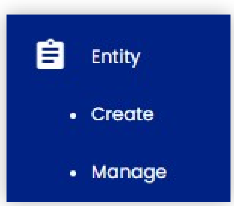
The following entity fields are created within VenioOne projects by default to be used with the entity extraction process:

Entity_Person Has_Entity_Person Entity_Location Has_Entity_Location Entity_Organization Has_Entity_Organization	Entity_SSN Entity_Debit_Credit_Card_Number Entity_EIN Entity_ITIN Entity_Phone_Number Entity_US_Passport_Number
Entity_Date Has_Entity_Date Entity_Time Has_Entity_Time Entity_Money Has_Entity_Money Entity_Percentage Has_Entity_Percentage	Has_Entity_SSN Has_Entity_Debit_Credit_Card_Number Has_Entity_EIN Has_Entity_ITIN Has_Entity_Phone_Number Has_Entity_US_Passport_Number

12.14.6 Manage Entity Fields

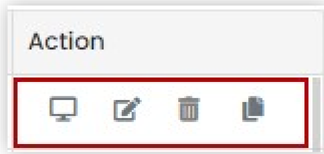
You can manage entity fields from the Entity Management section of Case Admin. Instructions on how to work with entity fields are included below.

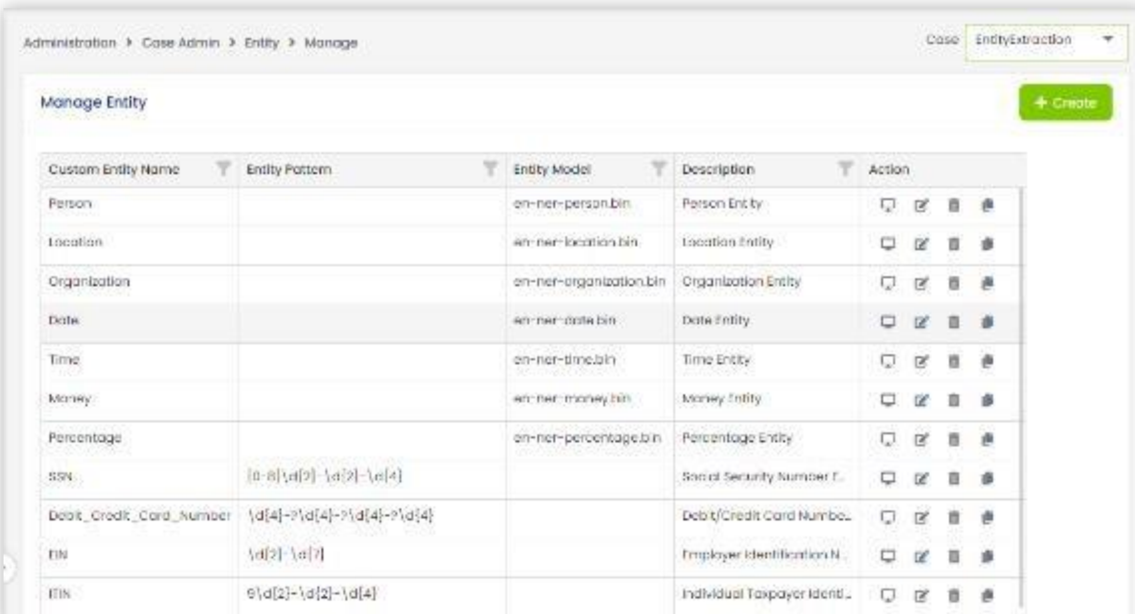
Admin Settings > Case Admin > Entity > Manage



To manage entity fields, click the Manage option. All the entity fields will be listed in the Manage Entity dialog. Entity Fields will be displayed according to the case selected in the Case dropdown list in the upper right corner.

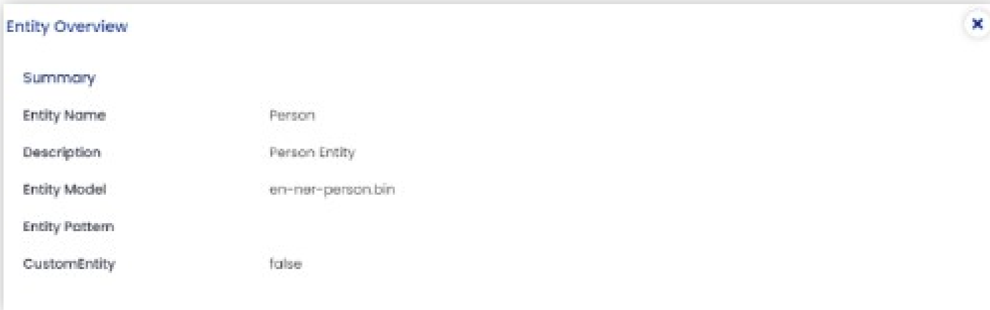
There are four actions available for each entity field:

	View	
	Edit	
	Delete	
	Clone	



12.14.6.1 Viewing Entity Fields

After clicking the View button adjacent to an Entity Field in the Manage Entity dialog, a summary of that entity field will display in the Entity Overview dialog.



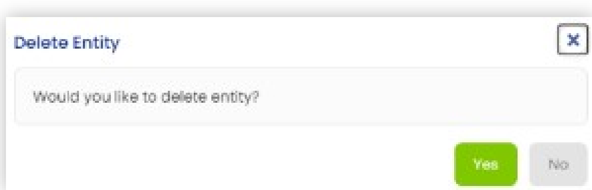
12.14.6.2 Editing Entity Fields

After clicking the Edit button adjacent to an Entity Field in the Manage Entity dialog, the following dialog will display. You can update the Entity Pattern and Description only. After completing your edits, click the Update button. You will be returned to the Manage Entity dialog.

12.14.6.3 Deleting Entity Fields

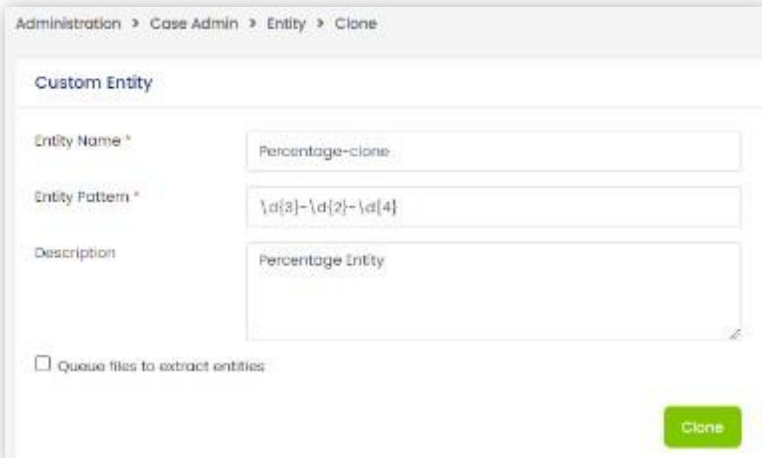
After clicking the Delete button adjacent to an Entity Field in the Manage Entity dialog, you will be asked to confirm the deletion. Click Yes to complete the deletion.

NOTE: You are not allowed to delete the default entity fields.



12.14.6.4 Cloning Entity Fields

After clicking the Clone button adjacent to an Entity Field in the Manage Entity dialog, the Custom Entity dialog will be displayed to create the clone from the selected entity field. Make the needed changes and click the Clone button to create the new entity field.



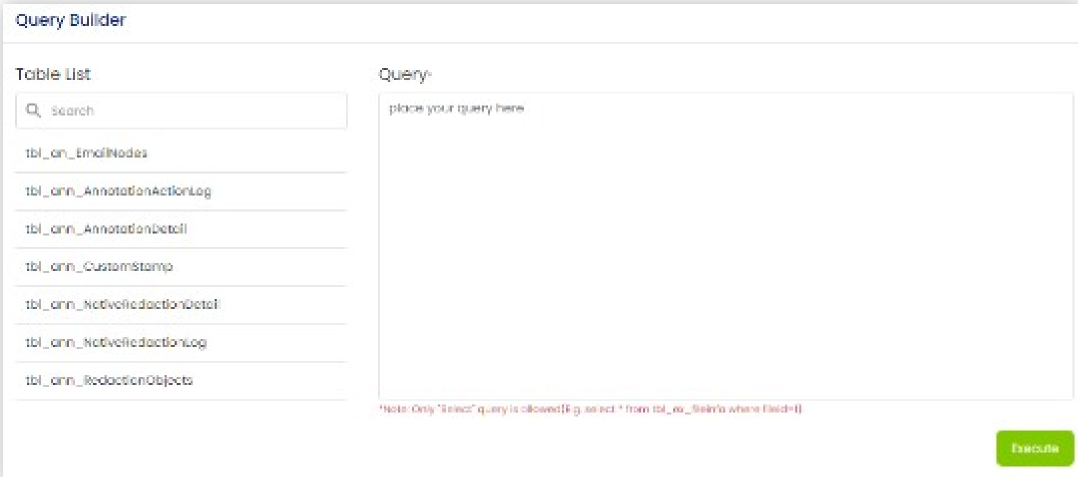
12.15 SQL Query Builder

The SQL Query Builder can be accessed by clicking the drop-down next to your name in the upper right corner and navigating to Admin Settings > Case Admin > Query Builder.

Admins can access SQL, but only the select statement is allowed to execute. Insert, Update, and Delete statements are not allowed to execute. Also, only the PCD database and synonym tables are accessible.

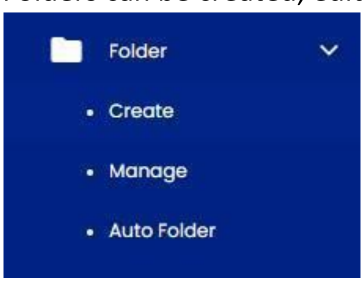
Use the Table List and Search field to assist with your query. Enter your query into the Query field and click the Execute button to run the query.

Venio



12.16 Folder Admin

Folders can be created, edited, and deleted from the Case Admin settings.



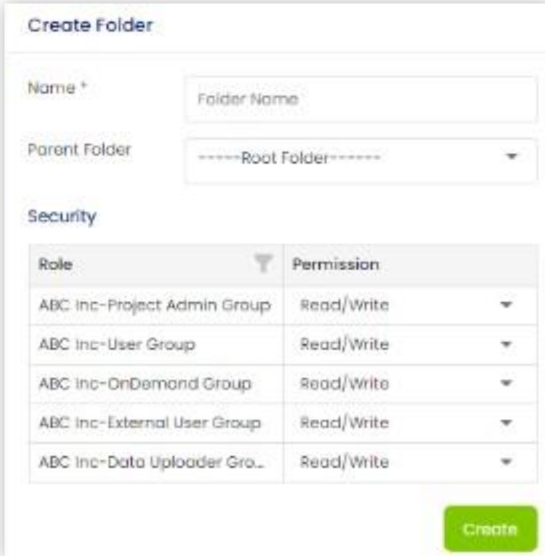
12.16.1 Create Folder

Administration > Case Admin > Folder > Create

To create a folder, follow the steps below:

Click the drop-down arrow next to your name in the top right corner.
Click Admin Settings > Case Admin >Folder > Create.

The Create Folder dialog displays.



Enter the Name.
Select the Parent Folder from the drop-down list.

NOTE: Selecting a parent folder may not be applicable for the first time as there will not be any other folders. As folders are created, you can easily select folders as parents and create a parent/child folder structure.

Set the permissions for each user group.
Click the Create button.

A message displays confirming creation of the folder.

12.16.2 Manage Folders

Administration > Case Admin > Folder > Manage

To manage folders, follow the steps below:

Click the drop-down arrow next to your name in the top right corner.
Click Admin Settings > Case Admin >Folder > Manage.

The Folders dialog displays a list of folders for the selected case.

NOTE: Items displayed under the OnDemand Shared Folders heading are those sets of documents that have been shared by users within the project.

Use the Edit, Clone, or Delete buttons to perform those actions.
Use the Expand All/Collapse All buttons at the top of the folder list to perform those functions.

12.16.3 Auto-Folder

Administration > Case Admin > Folder > Auto Folder

Auto-foldering will create a folder structure and add documents to the folders based on a set of criteria that is selected. You can also set security rights for which groups have access to the folders that are created.

Auto-Foldering can be done by:

- Relative File Path
- Custom Field

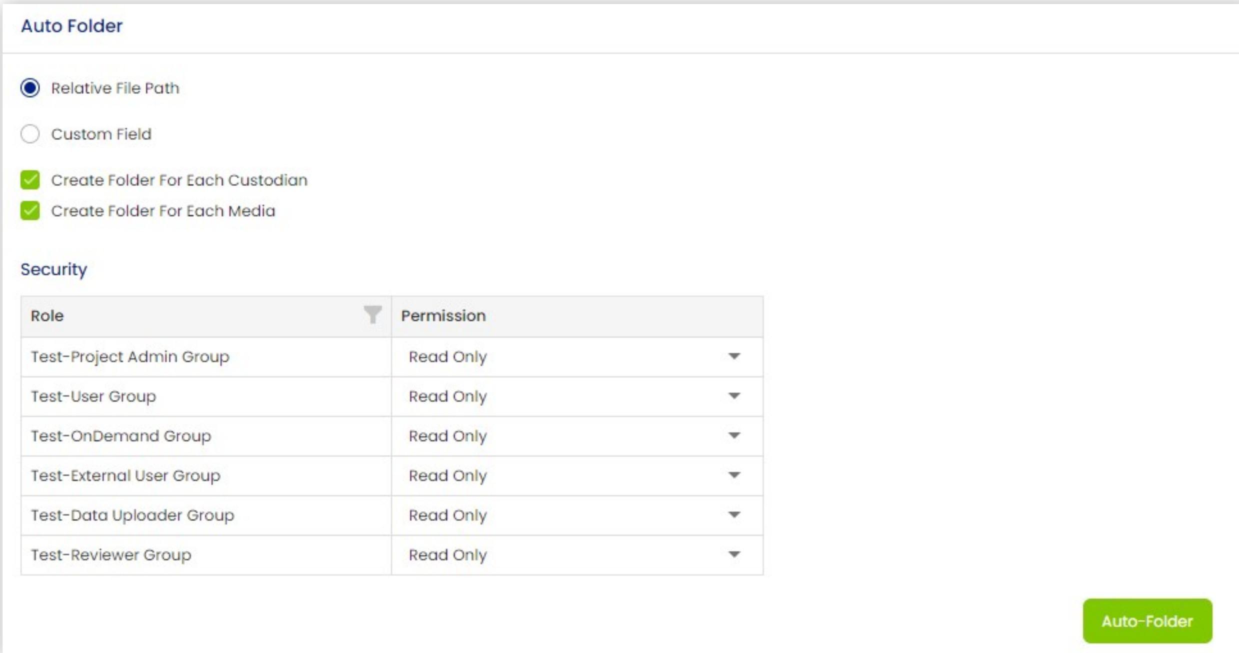
12.16.3.1 Auto-Folder by Relative File Path

To set up auto-foldering by relative file path, follow the steps below:

1. Click the drop-down arrow next to your name in the top right corner.

2. Click Admin Settings > Case Admin >Folder > Auto Folder.

   The Auto Folder dialog displays option settings.

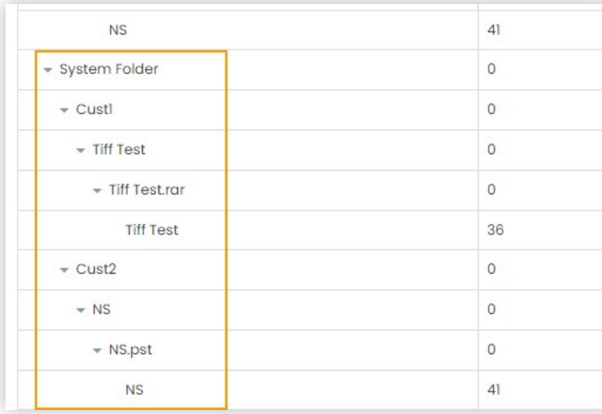


3. Select the Relative File Path option

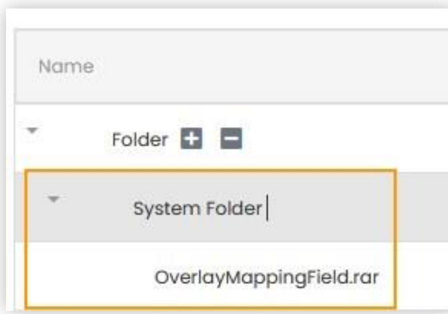
4. Check the desired options to Create Folder For Each Custodian and Create Folder For Each Media.

NOTE: If you check the Create Folder For Each Custodian and Create Folder For Each Media, check boxes, then a folder will be created under System Folder with each custodian, media, and file name. The document count will only be displayed for the folder where the documents are actually stored.

For example: Custodian1
>Media1
>Text.rar
>Text



However, if you create an auto-folder without checking the Create Folder For Each Custodian and Create Folder For Each Media check boxes, then a folder with a document count will be created without a custodian and media name.



5. Set the folder security rights for the individual groups using the drop-down lists.

6. Click the Auto- Folder button.

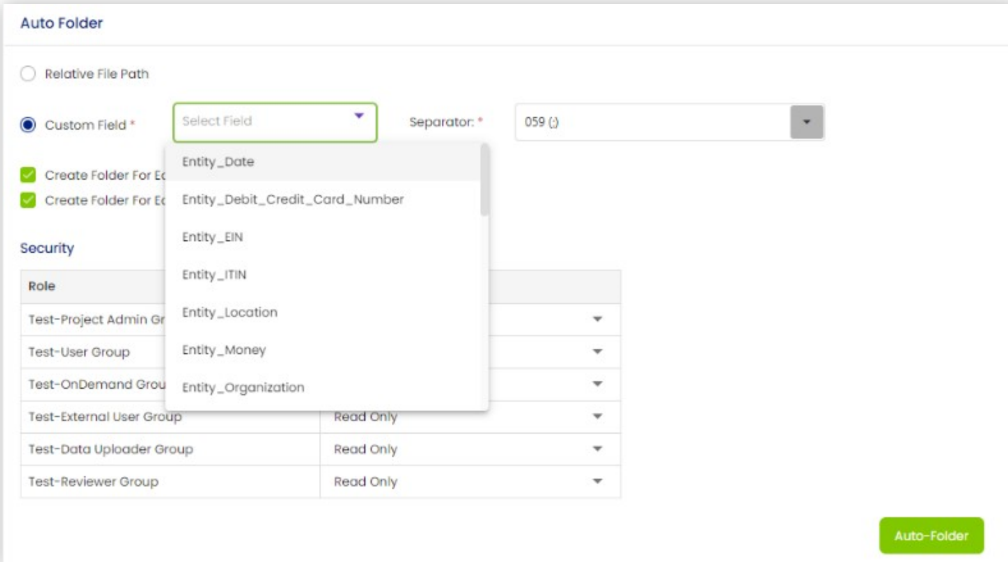
12.16.3.2 Auto-Folder by Custom Field

To set up auto-foldering by custom field, follow the steps below:

1. Click the drop-down arrow next to your name in the top right corner.

2. Click Admin Settings > Case Admin >Folder > Auto-Folder.

The Auto Folder dialog displays option settings.



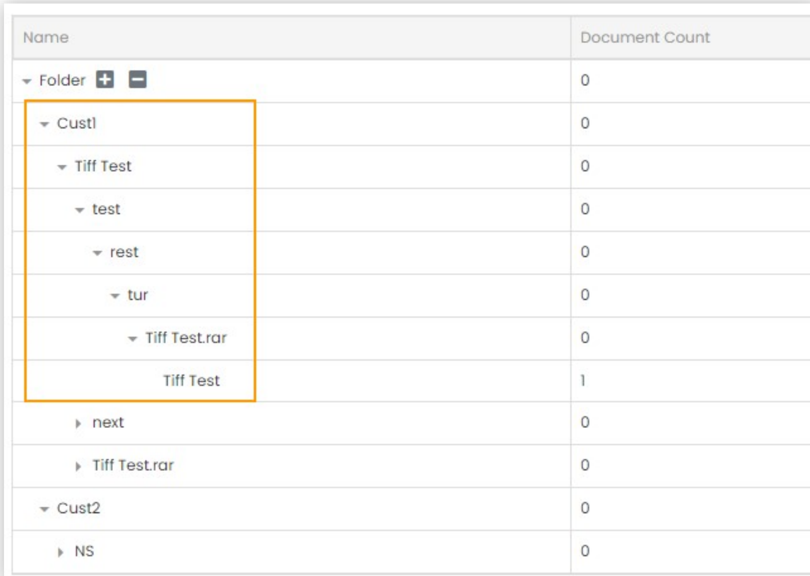
3. Select the Custom Field radio button

4. Select the Custom Field and Separator from the drop-down lists.

5. Set the folder security rights for the individual groups using the drop-down lists.

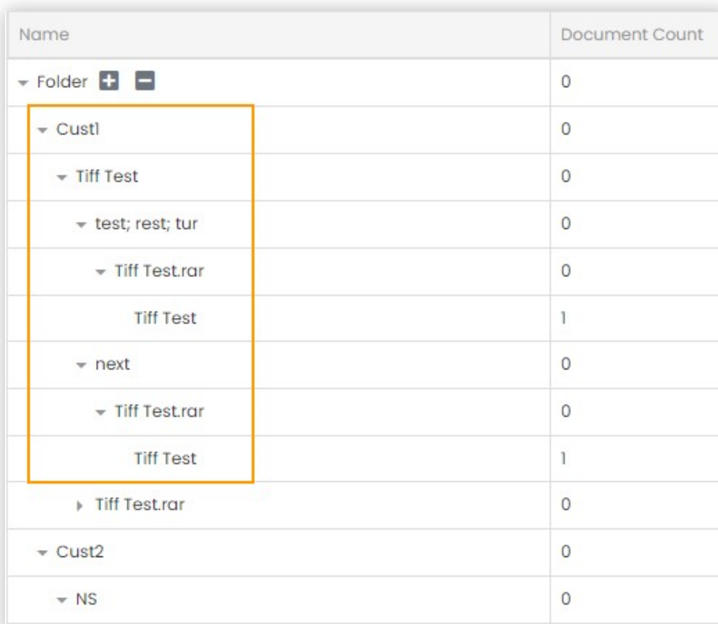
6. Click the Auto-Folder button.

NOTE: If the custom field's actual value’s delimiter is equivalent to the UI delimiter, then the different auto-folders will be created by using its value in a different hierarchy.



Name	Document Count
Folder	0
Cust1	0
Tiff Test	0
test	0
rest	0
tur	0
Tiff Test.rar	0
Tiff Test	1
next	0
Tiff Test.rar	0
Cust2	0
NS	0

However, if the custom field's actual value’s delimiter is not equivalent to the UI delimiter, then auto-folders will be created by using its value separated by its actual delimiter.



Name	Document Count
Folder	0
Cust1	0
Tiff Test	0
test; rest; tur	0
Tiff Test.rar	0
Tiff Test	1
next	0
Tiff Test.rar	0
Tiff Test	1
Tiff Test.rar	0
Cust2	0
NS	0

12.17 Password Bank

Admin Settings>>Case Admin>>Password Bank

The objective of having a Password Bank is to process password protected documents from a list of passwords stored in the Venio repository. Therefore, you have a list of passwords to try for any password protected documents as the data is ingested. The Password Bank also stores Lotus Notes User Ids and passwords. Items may be added to the Password Bank individually or imported using a.txt or.csv load file. Supported Lotus Notes version: 8.5.3,9.0.1,10.0.10,12.0.0. We also support HCL Notes version 10 and version 12.

12.17.1 Add Password to Password Bank

To add a password to the Password Bank, follow the steps below:

1. Click the drop-down arrow ▼ next to your name in the top right corner.

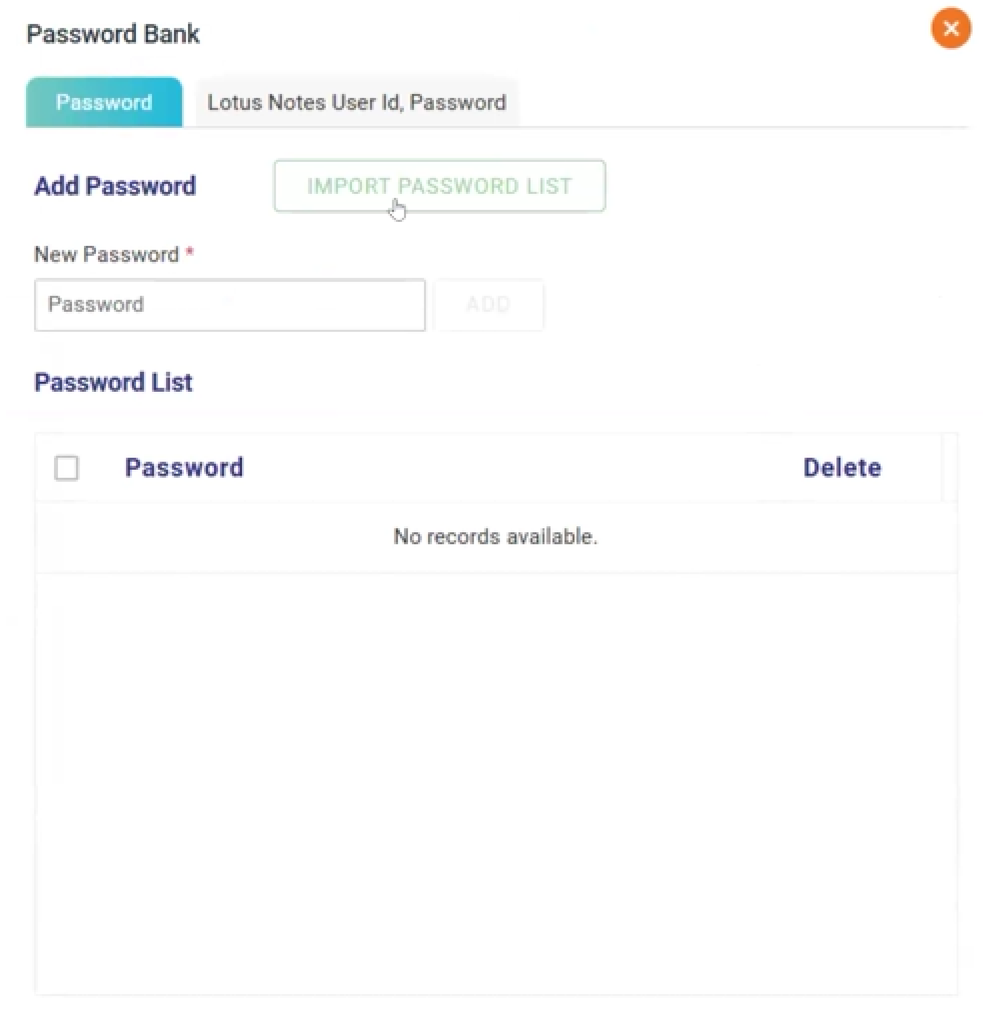
2. Click Admin Settings > Case Admin >Password Bank.

    The Password Bank displays the Password dialog.

Enter the password in the New Password field. Click the Add button.

If the NSF user id or password is already added, prompt of user id or password already added is displayed.

The password will be listed in the Password List.



12.17.2 Import Password List

You may add numerous passwords to the Password Bank at one time by using the Import option and a load file containing passwords.

Files containing passwords must be:

- Either.txt or.csv format
- Less than 5 MB size
- Less than 50,000 lines

To add passwords to the Password Bank using a load file, follow the steps below:

Click the drop-down arrow next to your name in the top right corner.
Click Admin Settings > Case Admin >Password Bank.

The Password Bank displays the Password dialog.

Click the Import Password List link.

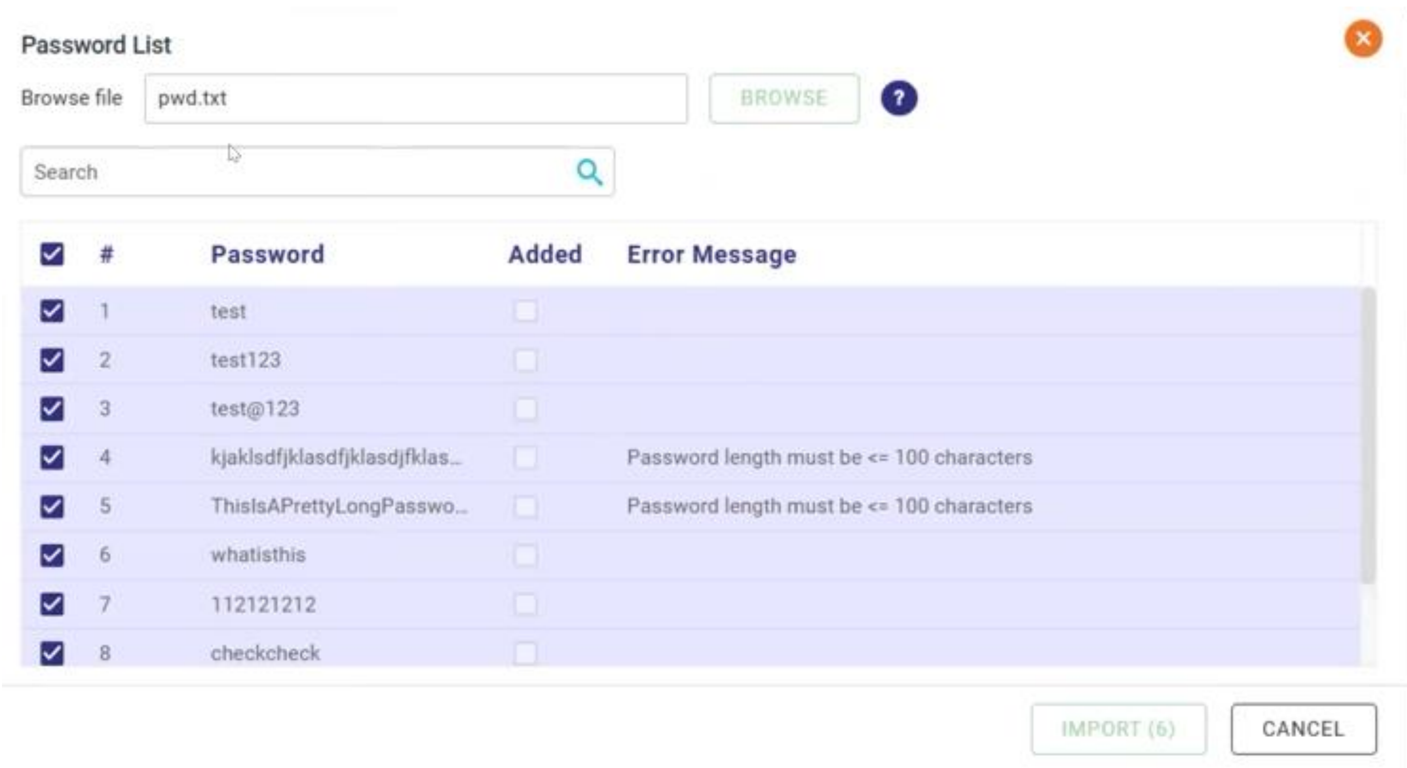
The Password List dialog displays.

Click the Browse button

Select the load file with the list of passwords and click the Open button.

NOTE: The load file must be in.txt or.csv extension format with each password on a separate line/row.

The list of passwords from the load file will be displayed after uploading the file.



With the passwords selected, click the Apply button.

The Password Bank is updated with the new passwords from the load file, and they are displayed in the Password List.

12.17.3 Delete Password

To delete a password, navigate to the Password Bank. Check the row(s) next to a password in the Password List and click the Delete button.

12.17.4 Lotus Note User Id, Password

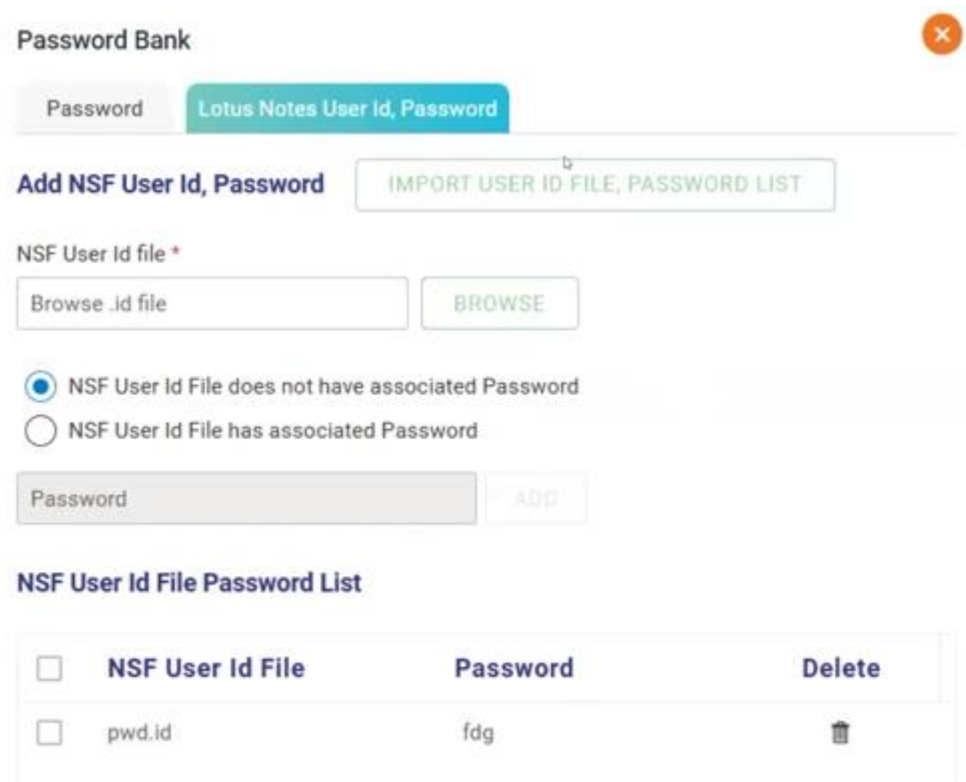
The password to a Lotus Notes NSF file can be provided in two ways, either via the.id file or manually entered. The available options are:

- NSF User ID file has associated password
- NSF User File does not have associated password

Click the drop-down arrow next to your name in the top right corner.
Click Admin Settings > Case Admin >Password Bank.

The Password Bank displays the Password dialog.

Click the Lotus Notes User Id, Password tab.



Click the Browse button.
Navigate to the NSF Userid File and click the Open button.
Select the radio button for either:

- NSF User Id File does not have associated Password

- NSF User Id File has associated Password

If the file does not have associated Password option is selected, enter the password in the Password field.
Click the Add button.

12.17.5 Import Lotus Notes User Id and Password List

You may add numerous Lotus Notes User Ids and passwords at one time by using the *Import* option and a load file containing the User Ids and passwords.

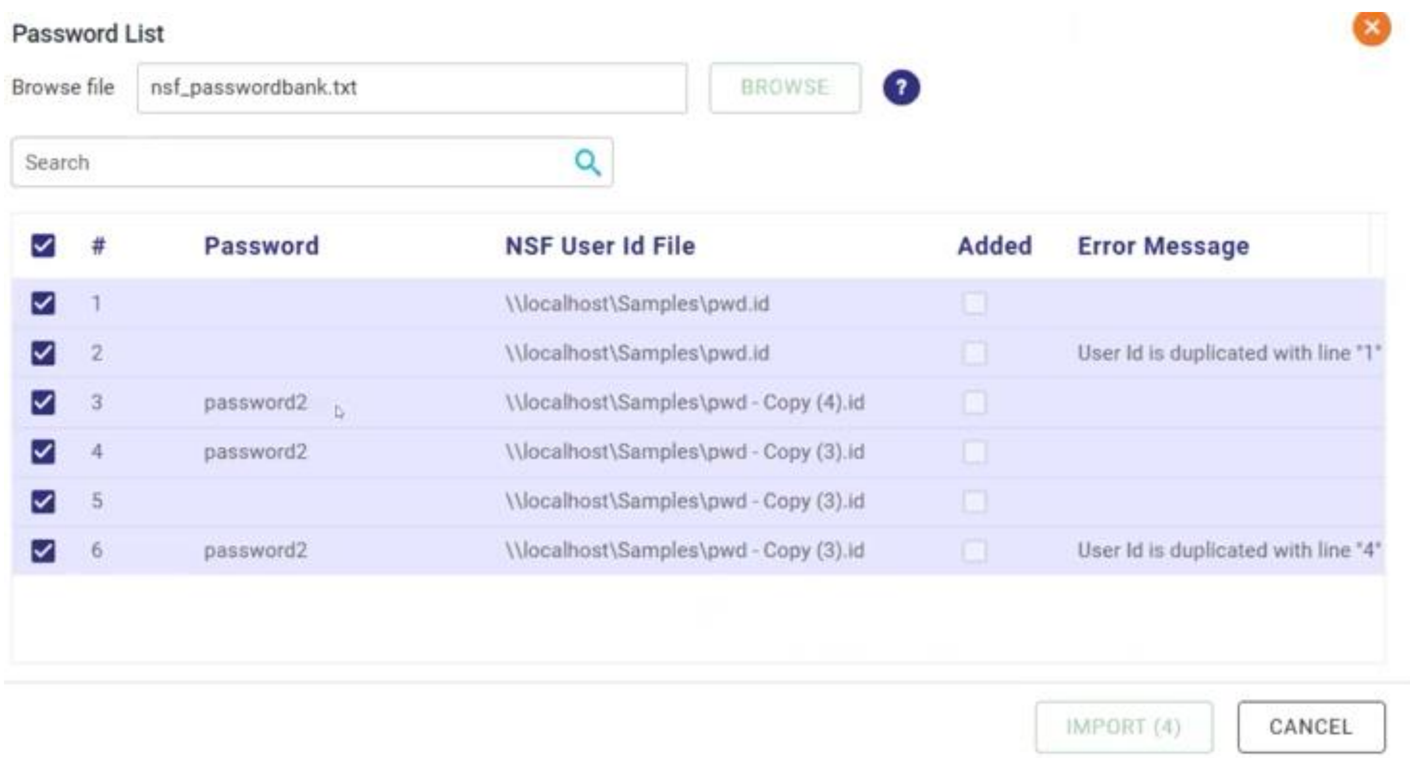
Files containing Lotus Notes Ids and passwords must be:

- Either.txt or.csv format
- Less than 5 MB size
- Less than 50,000 lines

Click the drop-down arrow next to your name in the top right corner.
Click Admin Settings > Case Admin >Password Bank.

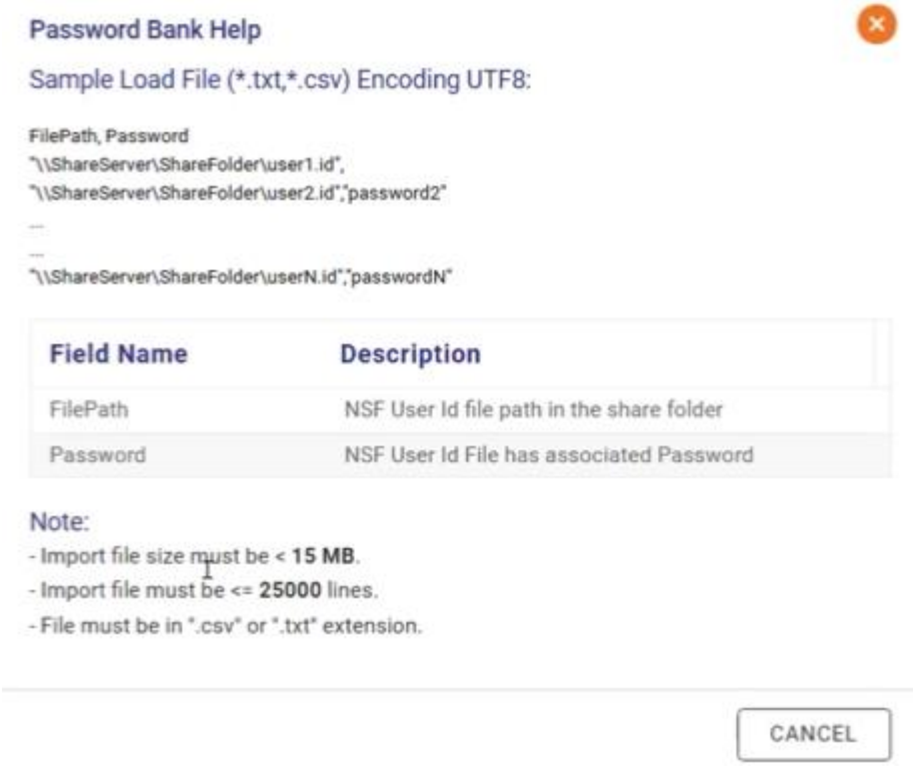
The Password Bank displays the Password dialog.

Click the Lotus Notes User Id, Password tab.
Click the Import User Id File, Password List link.
Click the Browse button.
Select the file containing the NSF User id and Password information and click the Open button.



The Password Bank is updated with the new User Ids and passwords from the load file, and they are displayed in the Password List.

NOTE: You may click the Help button for the format load file format information.


Password Bank Help

Sample Load File (*.txt,*.csv) Encoding UTF8:

FilePath, Password
"\\ShareServer\ShareFolder\user1.id",
"\\ShareServer\ShareFolder\user2.id","password2"
...
...
"\\ShareServer\ShareFolder\userN.id","passwordN"

Field Name	Description
FilePath	NSF User Id file path in the share folder
Password	NSF User Id File has associated Password

Note:
- Import file size must be < **15 MB**.
- Import file must be <= **25000** lines.
- File must be in ".csv" or ".txt" extension.

CANCEL

12.17.6.1 Export User Id file, Password

User Id files and associated passwords contained in the Password Bank can be exported using the Export button on the Lotus Notes User Id, Password tab in the Password Bank.

Simply navigate to the Lotus Notes User Id, Password tab in the Password Bank and click the Export link. The files are exported in either.csv or Excel format. You will be notified after the export is completed.

12.17.6.2 Delete Passwords

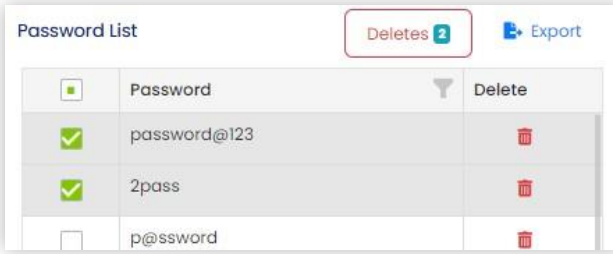
To delete a password from the Password Bank, follow the steps given below.

Click the drop-down arrow next to your name in the top right corner.
Click Admin Settings > Case Admin >Password Bank.

The Password Bank displays the Password dialog.

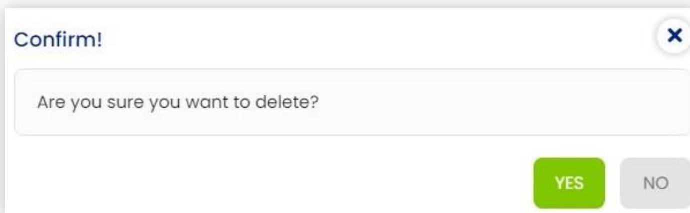
Click the Lotus Notes User Id, Password tab.
Click the Delete button beside the password to delete an individual password
OR

Place a check next to each password to be deleted and then click the Delete button that displays at the top of the list.



A confirmation of the deletion appears.

Click the Yes button.

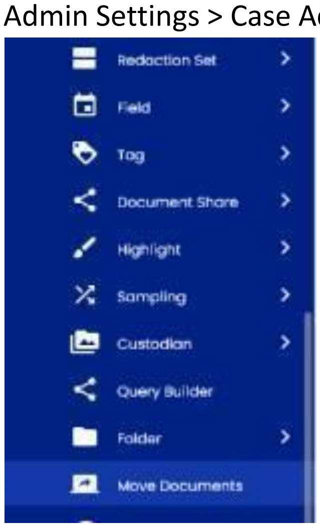


The password(s) is deleted.

12.18 Move Documents

This option is used to move documents and tags from one custodian to another.

Admin Settings > Case Admin > Move Documents



12.18.1 Move Documents Using Media as Source

This option is used to move documents from one custodian to another using media as source.

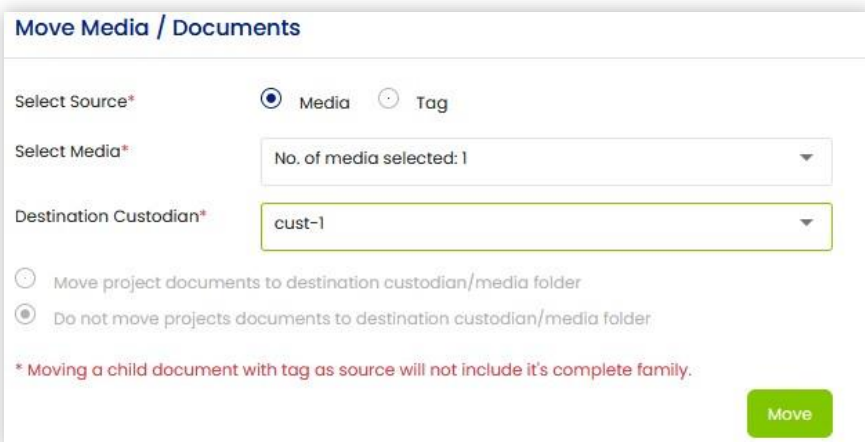
Admin Settings > Case Admin > Move Documents

Click the drop-down arrow next to your name in the top right corner.
Click Admin Settings > Case Admin > Move Documents.

The Move Media / Documents dialog displays.

Select Media as Source
Select the document you want to move using the Select Media drop-down list.
Select the Destination Custodian to which you want to move the media.
Click the Move button.

A success message will indicate that the media has been moved.



12.18.2 Move Documents Using Tag as Source

This option is used to move documents from one custodian to another using tags as the source. To use this option, at least on media should have a tag.

Admin Settings > Case Admin > Move Documents

Click the drop-down arrow next to your name in the top right corner.
Click Admin Settings > Case Admin > Move Documents.

The Move Media / Documents dialog displays.

Select Tag as Source

Select the tag linked with the media you want to move using the Select Tag drop-down list.
Select the Destination Custodian to which you want to move the media.
Click the Move button.

A success message will indicate that the media has been moved.

12.19 Case Promotion

A case may contain lots of documents that are not relevant for investigation or review. With large cases, there may be an impact on performance when navigating or reviewing documents. To better manage the eDiscovery workflow, the admin may want to create a new case that contains only documents that need further investigation or review from an existing case. Once all the documents in a case are identified to be used for the next phase of eDiscovery, the admin will want to quickly create a new case with these documents.

The Promote Project module is used to promote or transfer metadata, physical files (native, full text, images), and/or work product from one project to another.

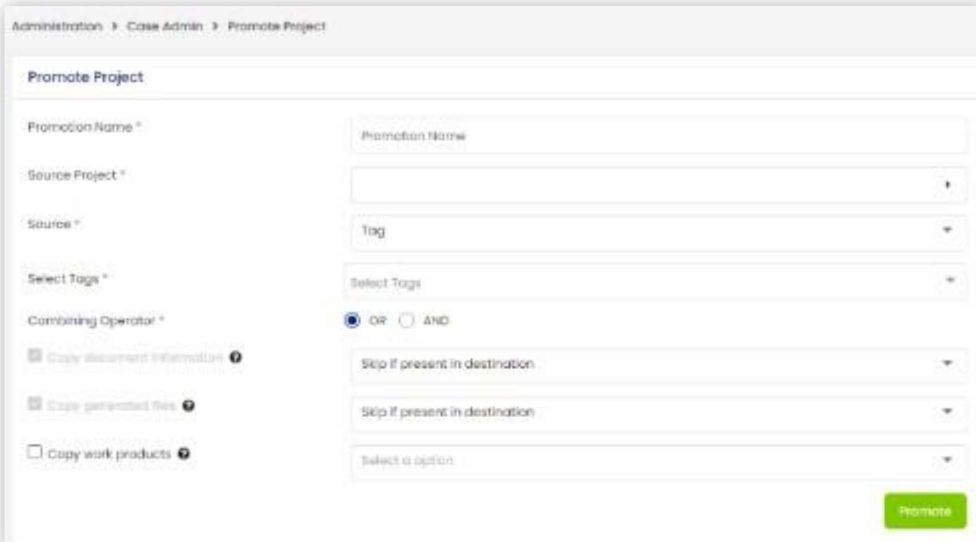
12.19.1 Promote Project

Administration >Case Admin > Promote Project

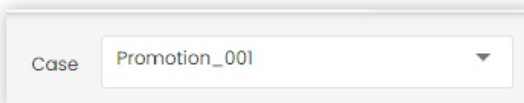
To promote a project, follow the steps given below.

Click the drop-down arrow ▼ next to your name in the top right corner.
Click Admin Settings > Case Admin > Promote Project.

The Promote Project dialog displays.



Select the destination case that you want to promote data to, from the upper right corner.

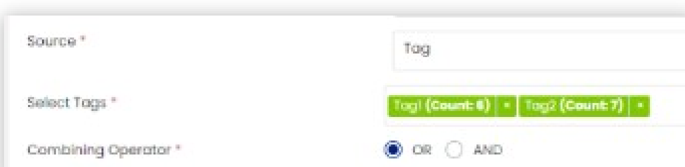


Enter the Promotion Name.
Select the Source Project from which you want to promote data.
Select Source Type from the drop-down list.
The options are: Tag, Folder, Saved Search, and Media.

The page will be updated based on the Document Source selected.

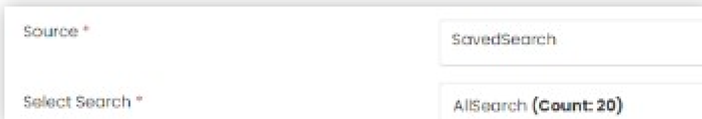
Select the source items to be included:

Tag



Folder

Saved Search



Media

Select the Combining Operator OR or AND for a Source Type that has multiple values selected. If you wish to copy documents, check the Copy Document Information checkbox and then select a document copy option. This option promotes the document information from the source project to the destination project. This includes custodian/media and metadata of the documents.

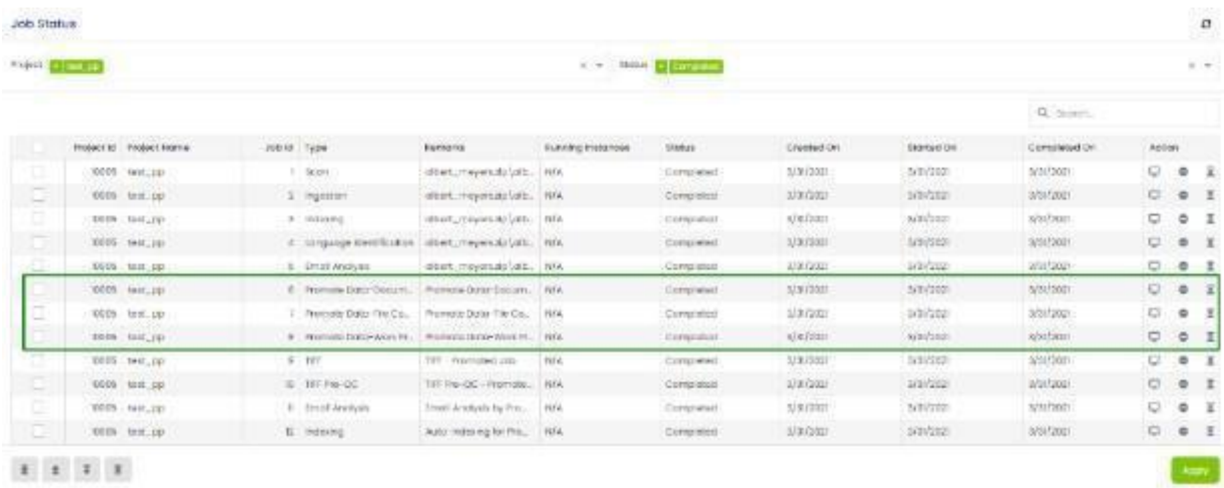
If you wish to copy files, check the Copy generated files checkbox and then select a generated files option. This option promotes physical files: Native, PDF, HTML, RTF, Fulltext (original fulltext, OCR text, TIFF OCR text, Redacted OCR text), TIFF (Original TIFF, Redacted TIFF). If you wish to copy work product, check the Copy work products checkbox and then select a work product option. This option promotes the work product like tagging, foldering, redaction, and values of custom fields for the documents.

NOTE: There are two methods to copy the data and files:

- Skip if present in destination: If this option is selected, only data and files that have not been promoted before will be promoted.
- Overwrite with source data: If this option is selected, it will promote and override existing data with new information/data.

Click the Promote button.

Promotion jobs are created and may be tracked in the in System Admin > Job > Status as shown below.



12.19.2 Promote Project Fields

In order to display the promoted source fields from a promoted project as searchable fields in the new project, you will need to add them from Field Management.

Add the following fields:

- PROMOTED_SOURCE_PROJECT_ID: Field is populated with the Project ID from the source.
- PROMOTED_SOURCE_PROJECT_NAME: Field is populated with the Project Name from the source project.
- PROMOTED_SOURCE_FILEID: Field is populated with the source FileID.

12.20 Image Set

As an admin, you may want to assign Bates numbers to images and assign the control numbers to review documents when reviewing documents in Venio. The assigned control and Bates numbers lets you manage review documents in an efficient way. The reviewer can quickly identify image keys on the branded images and can quickly reference these images to a document.

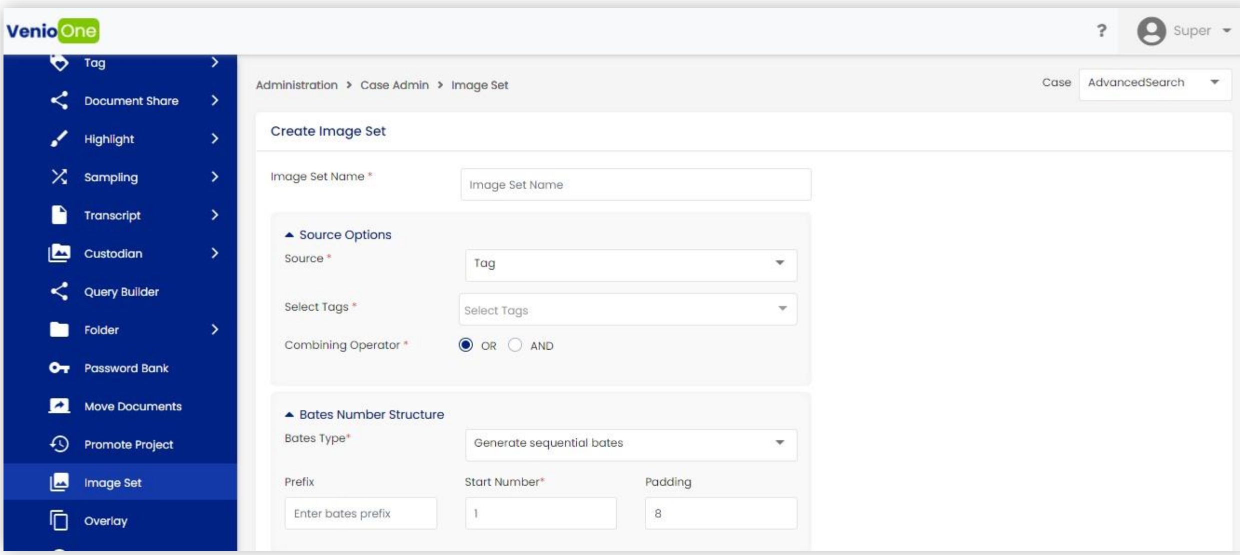
By applying and branding control numbers and image keys to images, the review is more efficient, and documents are better organized.

12.20.1 Create Image Set

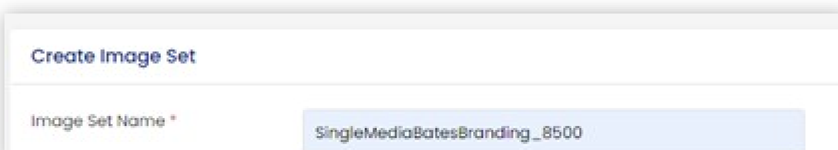
Administration >Case Admin > Image Set

To create an image set, follow the steps given below.

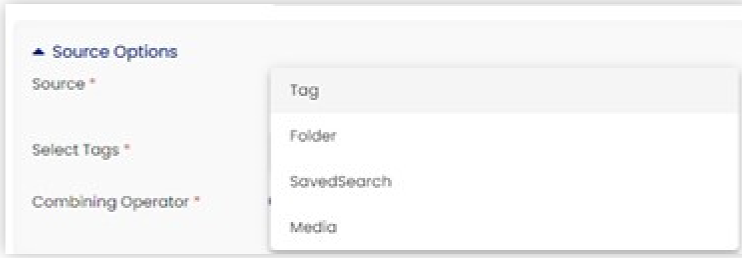
Click the drop-down arrow next to your name in the top right corner. Click Admin Settings > Case Admin > Image Set.



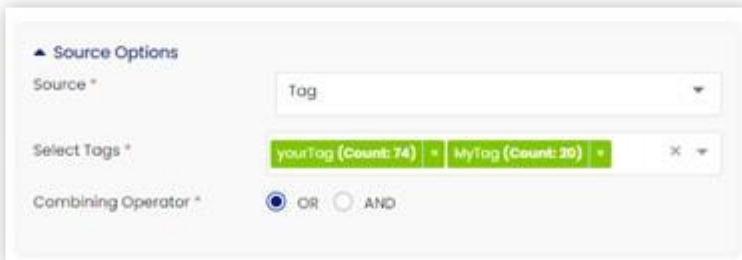
Enter Image Set Name.



Select Source Option by selecting the source type (Tag or Folder or Saved Search or Media) and also toggle the combining operator (OR, AND) where applicable.

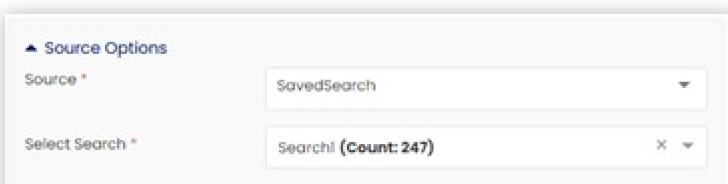


Select Tag from the available options.



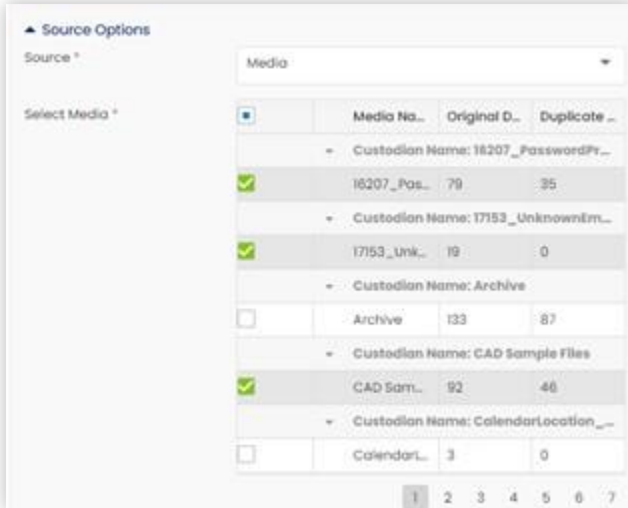
Select Folder from the available options.

Select Search from the Source drop-down.



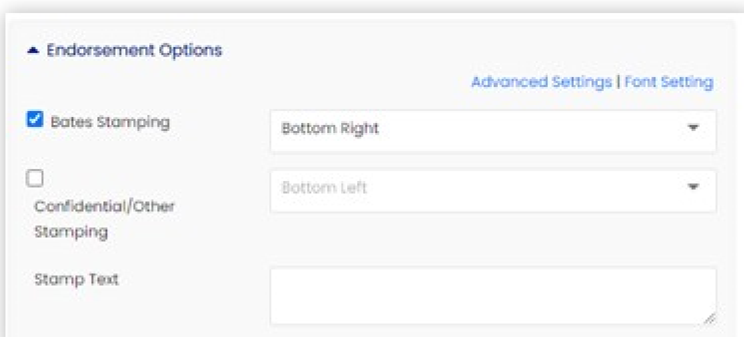
Select Media from the Source drop-down.

Venio

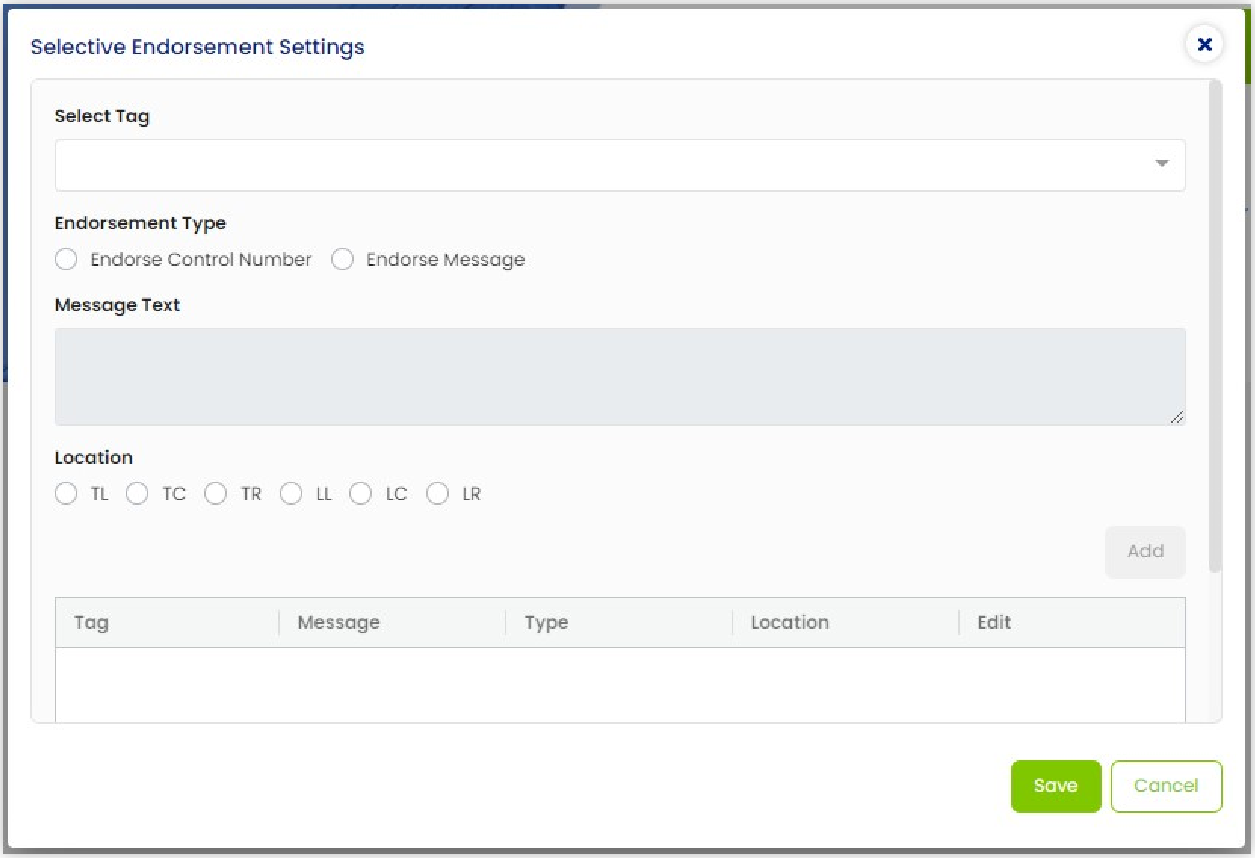


Apply bates number structure by selecting the Bates Type (Generate sequential bates or generate bates based on field value), apply bates Prefix, start number and padding.

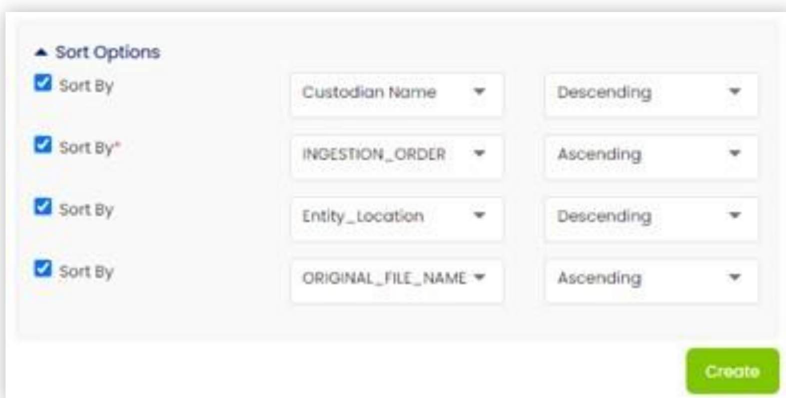
Apply endorsement options by selecting Bates Stamping option.



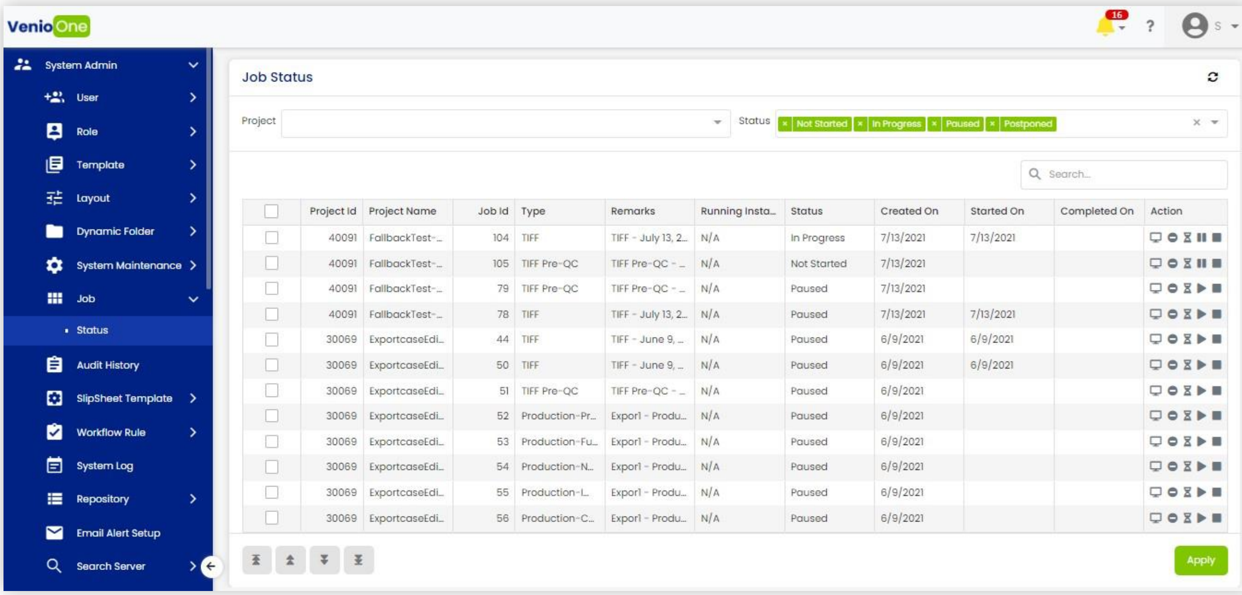
Click Advanced Settings to add Tag, Endorsement Type, Message and Location details in the fields provided. Click Save.



Click Font Settings to set the Font Name, Size and Type. Once done, click Save.
You can also apply the sort option to be displayed while listing or fetching the result.



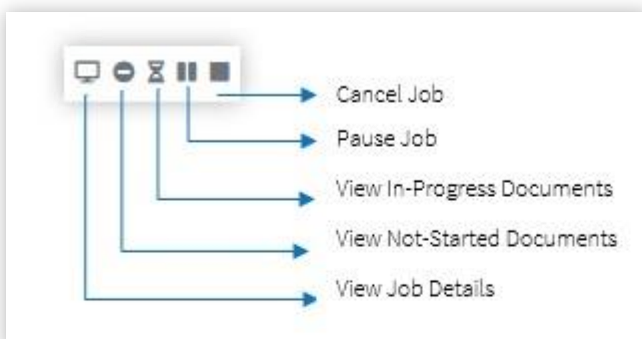
Click Create to create an Image set. Once Image set is created you can view those images set in Image viewer. The job is created and visible in System Admin >> Job >> Status.



12.20.2 View Job Status

Select the project and/or status to view Image set production and their status.

Within the Job Status, you can View Job Details, View Not Started Documents, View In-Progress Documents, pause, cancel, or resume jobs. Click the respective action button on the row of the job for any desired action.



12.20.3 Adjusting Job Priority

You can prioritize the jobs by first selecting the job(s) using the check boxes on a job's row and then clicking the up and down arrow buttons at the bottom of the screen.

Set top Priority

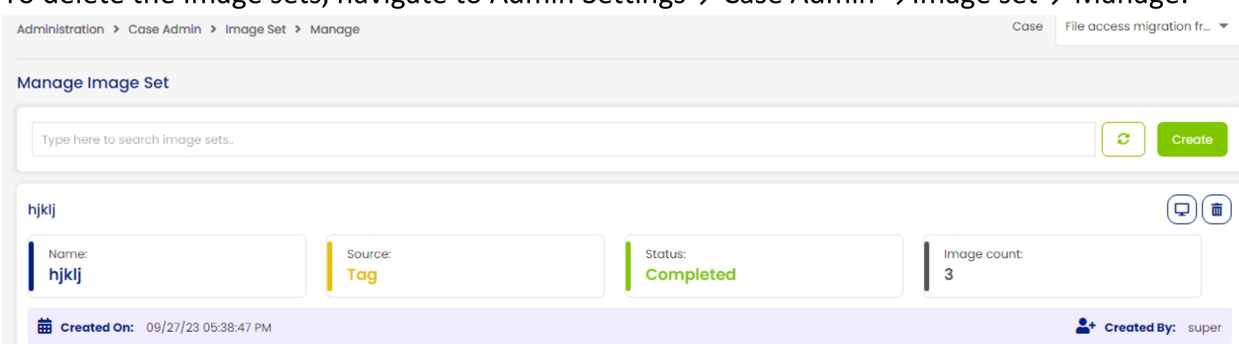
Set least priority

Increase Priority

Decrease Priority

12.20.4 Deleting an Image Set

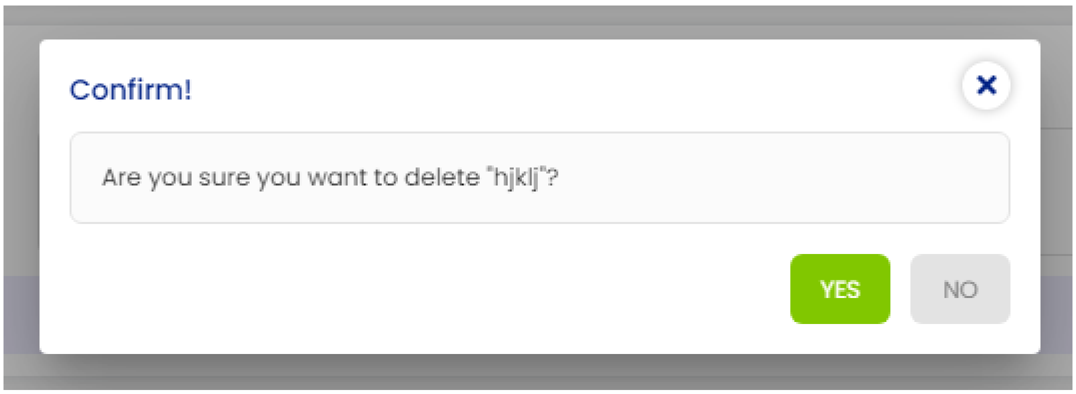
You can delete the Image sets from the Manage Admin page.
To delete the Image sets, navigate to Admin Settings→ Case Admin →Image set→ Manage.



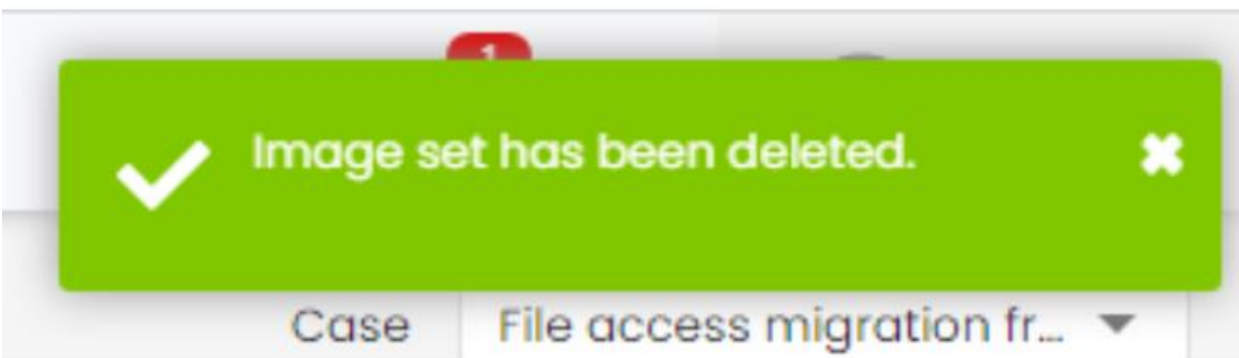
The deletion rights are based on two role rights- *Allow to create image set* and *Allow to delete image set*.

Once you create an image set, the system will navigate you to Manage Image Set page where you can handle the deletion.

The image set comprises of sections like Name, Source, Status, Image count, and Created by.
The delete image set option is added along with the job status icon.
NOTE: If we are deleting an image set, the actual image is not deleted.
Once the image set is deleted, a confirmation message is displayed.



And once we click on "Yes".

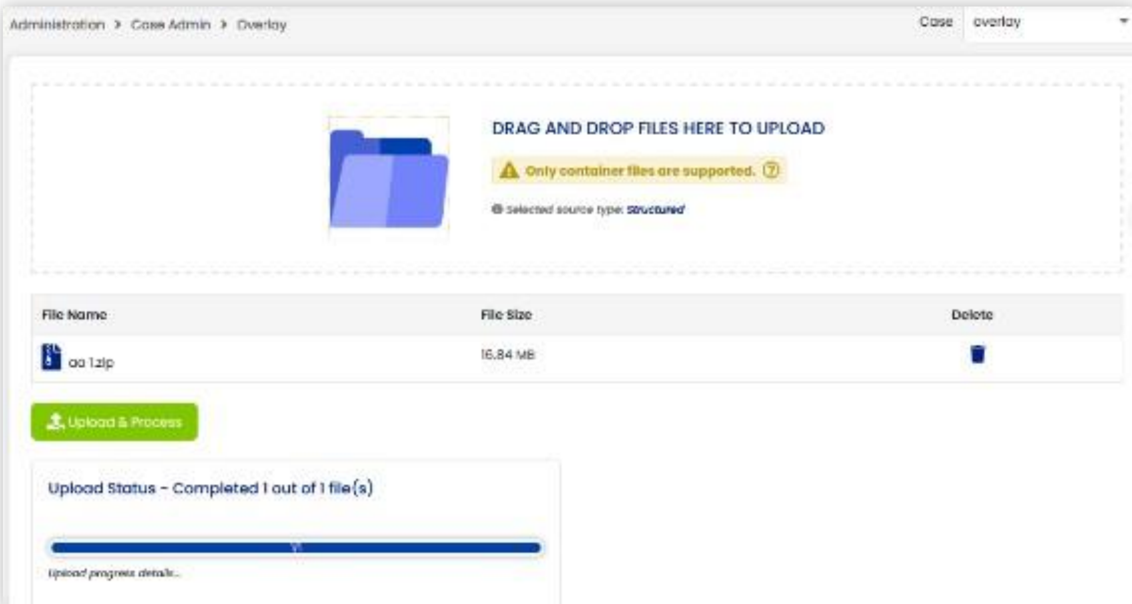


12.21 Overlay

Overlay can be accessed by clicking the drop-down next to your name in the upper right corner and navigating to Admin Settings > Case Admin > Overlay.

Admins can also access this page and upload container files by clicking on Upload & Process after selecting the Structured data type on the Upload screen.

For more detailed instructions refer to Section 5.5 Processing Structured Data above.

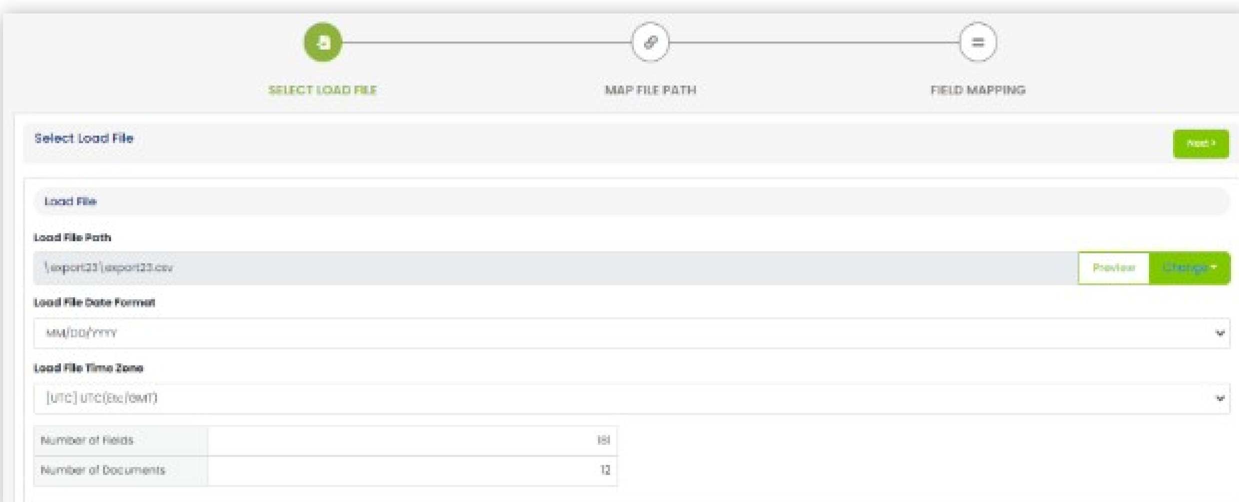


After the file is uploaded successfully, you will get a notification that indicates the upload is complete accompanied by the Overlay Analysis Complete notification, containing a link through which you can navigate to the Overlay dialog. This dialog consists of the following three sections:

12.21.1 Select Load File

12.21.1.1 Overlay Fields Accordion

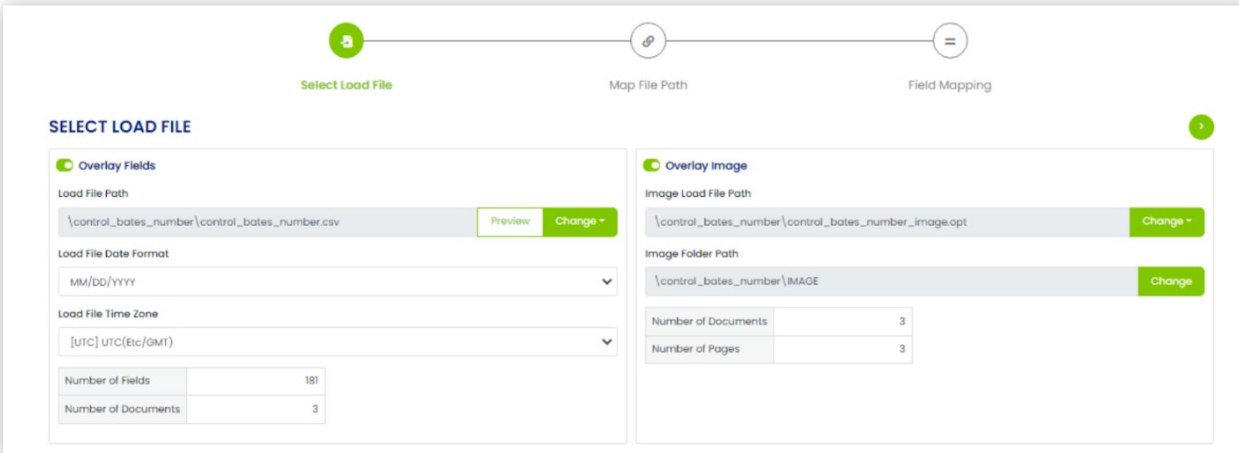
Load File Path, Load File Date Format, and Load File Time Zone will be set in this section.



12.21.2 Overlay Image Accordion

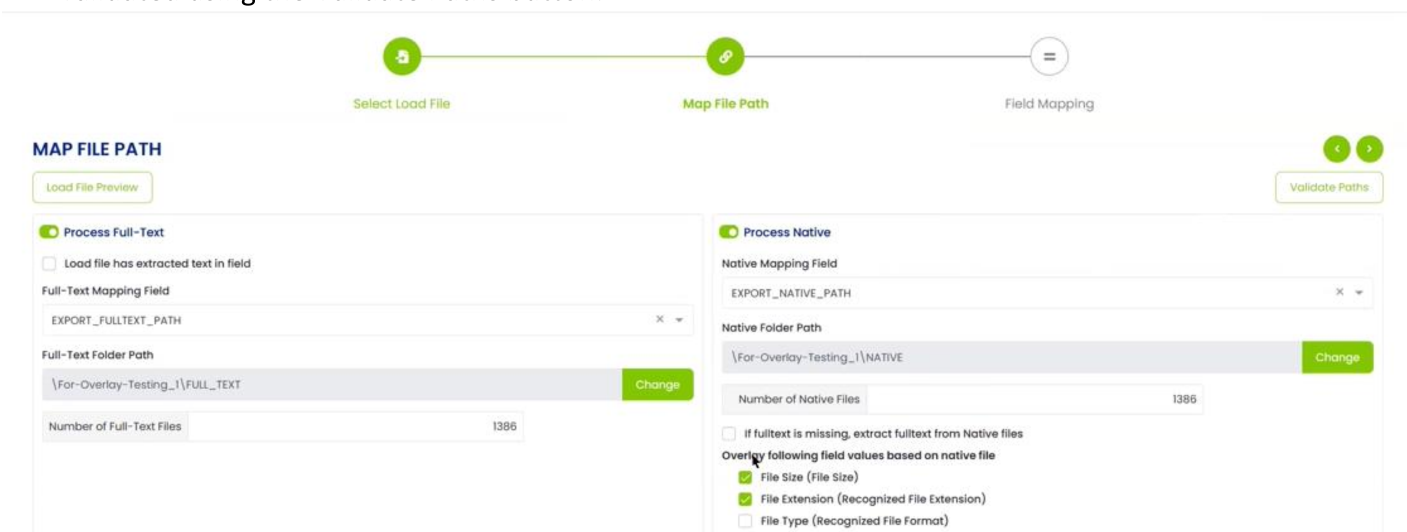
Image Load File Path, Image Folder Path will be set in this section.

Note! At least one accordion must be enabled to proceed.



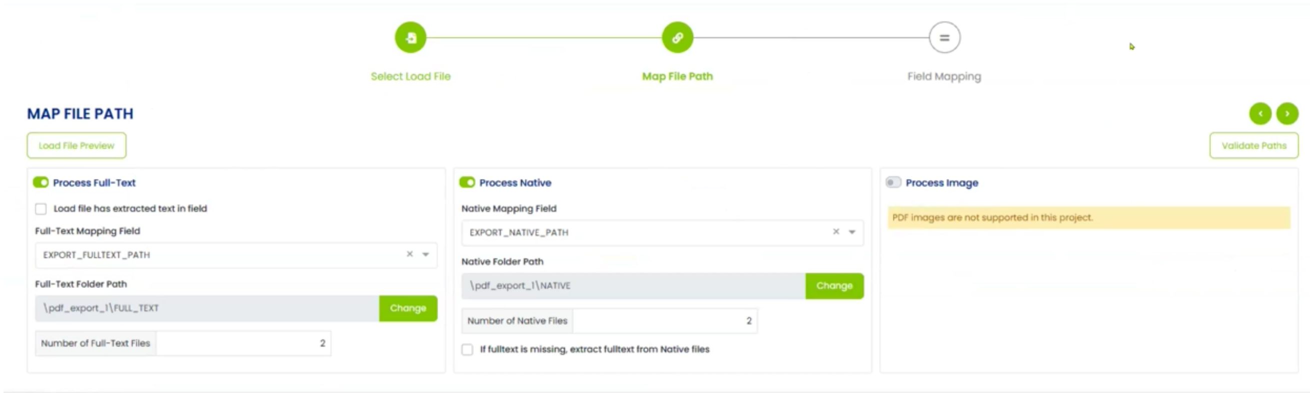
12.21.3 Map File Path

Process Full-Text and Process Native sections will be available where Full-Text Mapping Field and Native Mapping Field, as well as the file paths, will be selected. Selected paths will be validated using the Validate Paths button.



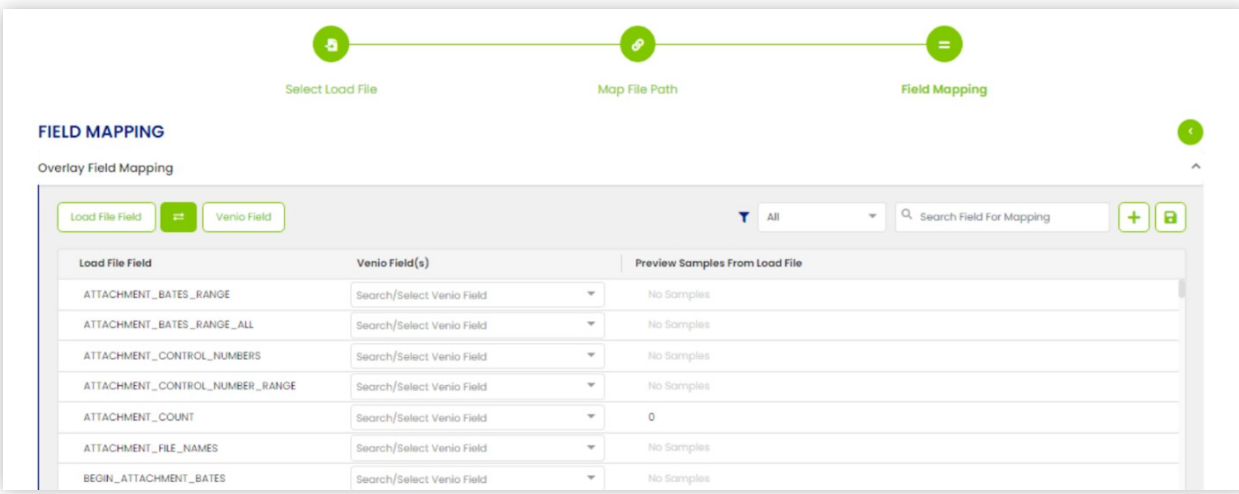
Note! If Overlay Fields accordion is disabled, Map File Path step will not be visible.

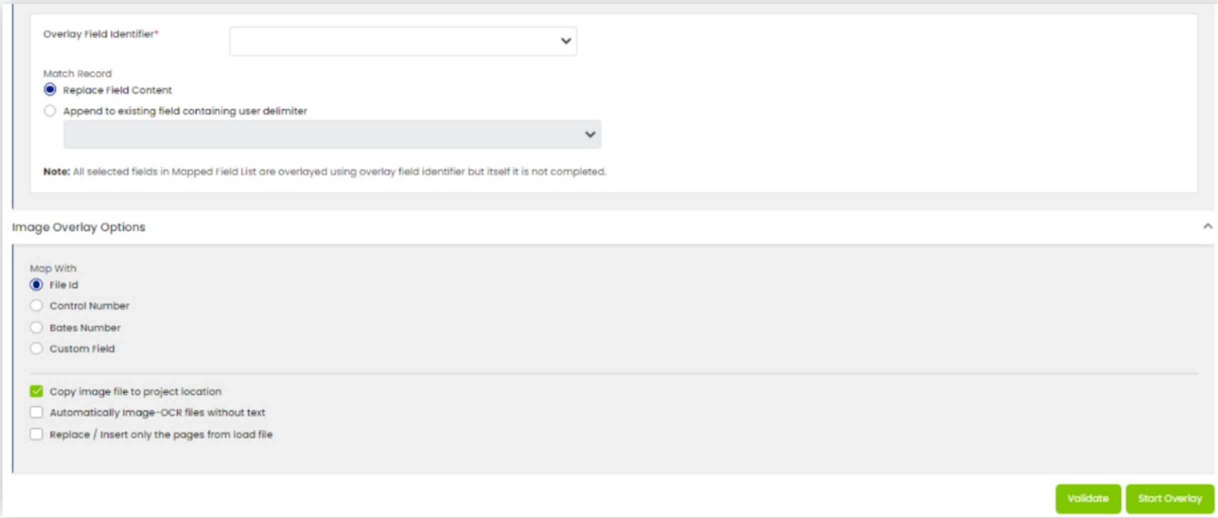
For TIFF cases, Process section is not enabled when PDF images are uploaded as PDF is not supported, similarly, for PDF cases, tiff images are not supported. You can also import pdf images in opticon format.



12.21.4 Field Mapping

In this section, the Load File Fields will be mapped to Venio Fields. An Overlay Field Identifier should be chosen.





12.21.5 Field Overlay Options

Two options for matching the records are available:

- Replace Field Content
- Append to existing field containing user delimiter.

12.21.6 Image Overlay Options

Below Radio button options are available to select the mapping field for image overlay

- File Id (Selected by default)
- Control Number
- Bates Number
- Custom field

Following checkbox options are available as well:

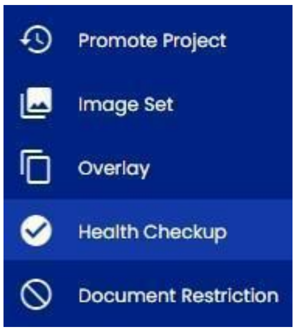
- Copy image file to project location (Selected by default)
- Automatically Image-OCR files without text
- Replace/Insert only the pages from load file

Finally, fields can be validated using the Validate button and the overlay can be started by clicking the Start Overlay button. After the process is complete, an Overlay Complete notification is sent to you.

12.22 Health Checkup

Run a Health Checkup any time to check the system status and fix issues when adding new data to a case. Health Checkups should be run anytime there is a change made to your VenioOne environment.

Administration >Case Admin > Health Checkup



To run Health Checkups, follow the steps given below.

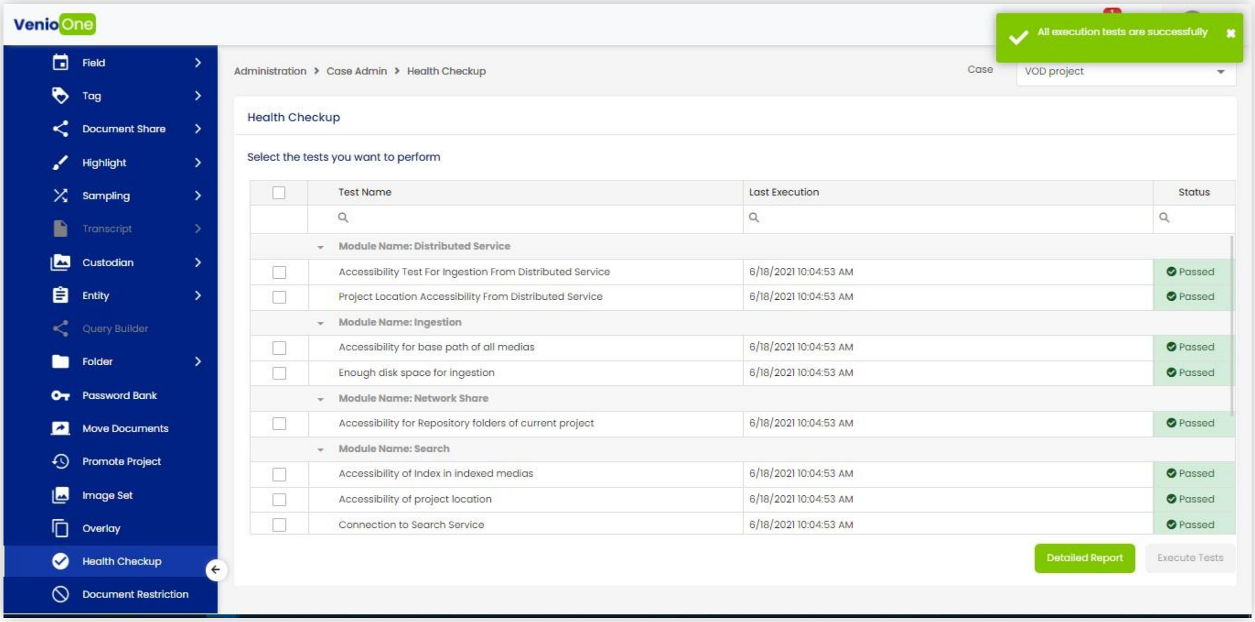
- Click the drop-down arrow next to your name in the top right corner.
- Click Admin Settings > Case Admin > Health Checkup.

  The Health Checkup dialog displays.

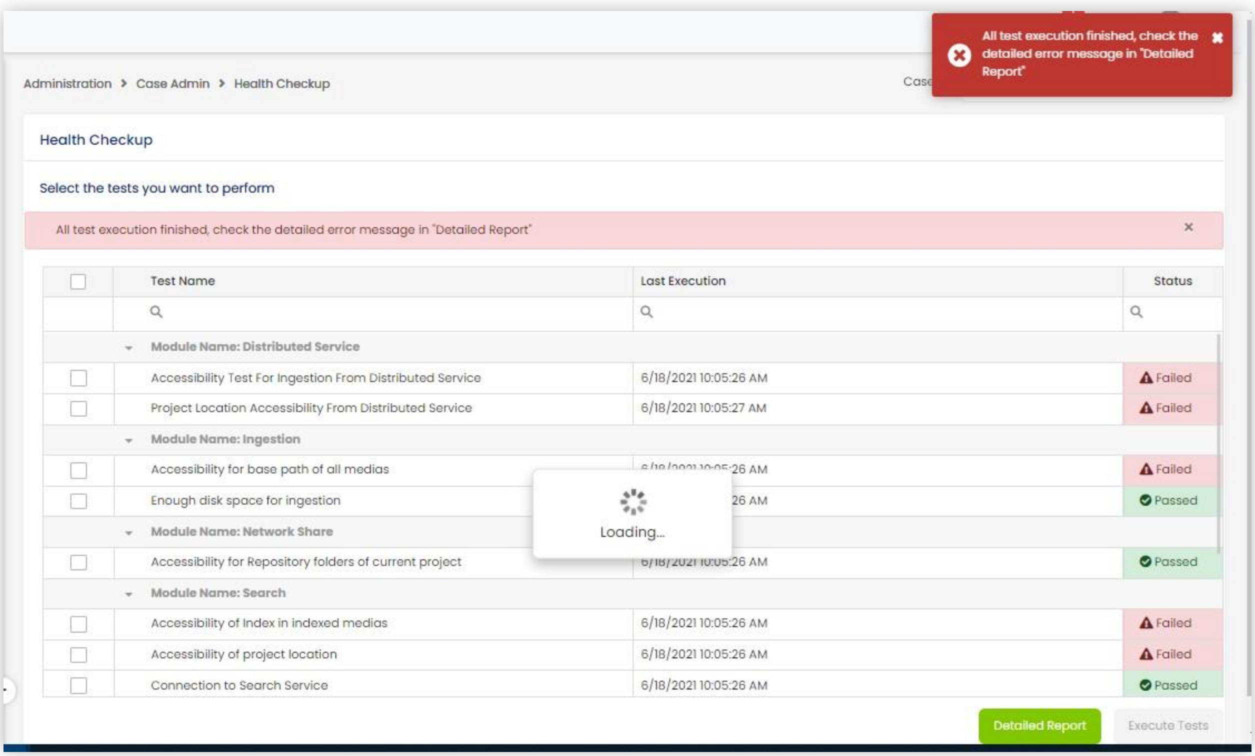
Check the boxes to select the test cases.
Click the Execute Tests button.

The status will display either Passed or Failed next to each case.

Venio

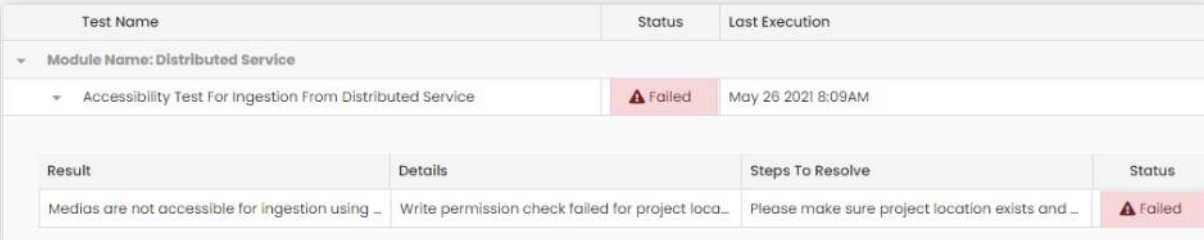


Depending on whether the checkup Passed or Failed, the result is displayed alongside the case.



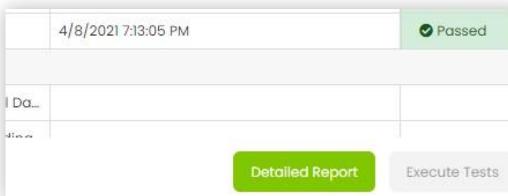
12.22.1 Resolving Failed Health Checkups

Click on Detailed Report button for generating the report on the page itself. The report can be downloaded by clicking on Export Report.
For any failed tests, click the arrow next to the test name to display the reason for the failure and steps to resolve it.

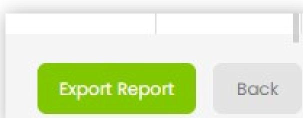


12.22.2 Creating a Health Check Report

If desired, click the Detailed Report button to create a report on the test results.



Then, click the Export Report button to generate a CSV file, which is saved to your computer's Downloads location.

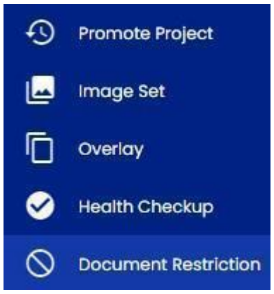


12.23 Document Restriction

Document restriction limits a specific user group's access to files and can be done in two ways:

- By Folder
- By Media

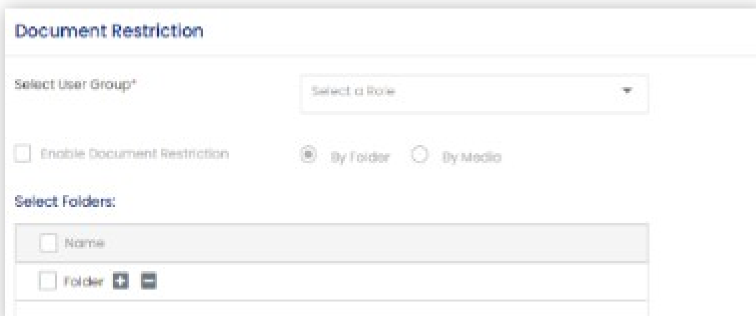
Administration > Case Admin > Document Restriction



12.23.1 Restrict Document Access by Folder

Click the drop-down arrow next to your name in the top right corner.
Click Admin Settings > Case Admin > Document Restriction.

The Document Restriction dialog displays.



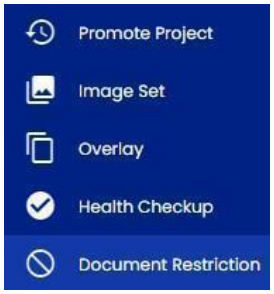
Select a user group using the Select User Group drop-down list.
Select the Enable Document Restriction check box.
Select the By Folder option.
Place checks to select the folders you wish to restrict.
Click the Save button.

12.24 Document Restriction

Document restriction limits a specific user group's access to files and can be done in two ways:

- By Folder
- By Media

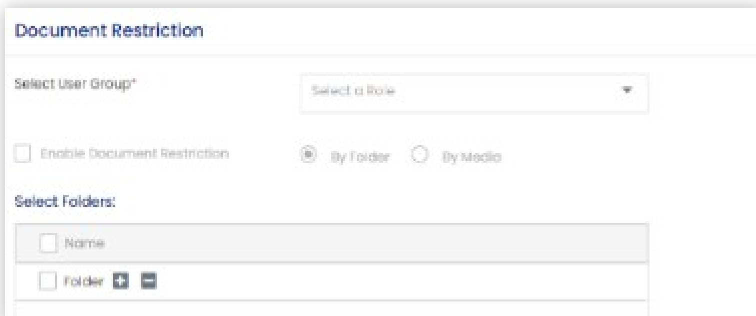
Administration > Case Admin > Document Restriction



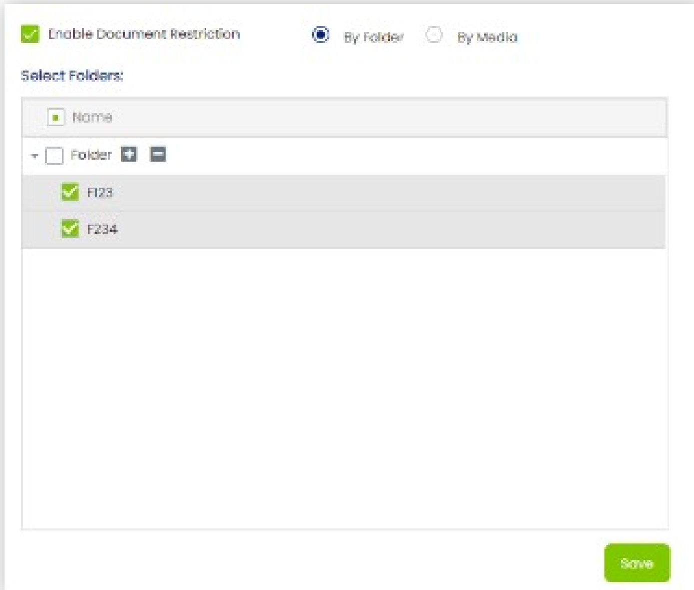
12.24.1 Restrict Document Access by Folder

Click the drop-down arrow next to your name in the top right corner.
Click Admin Settings > Case Admin > Document Restriction.

The Document Restriction dialog displays.

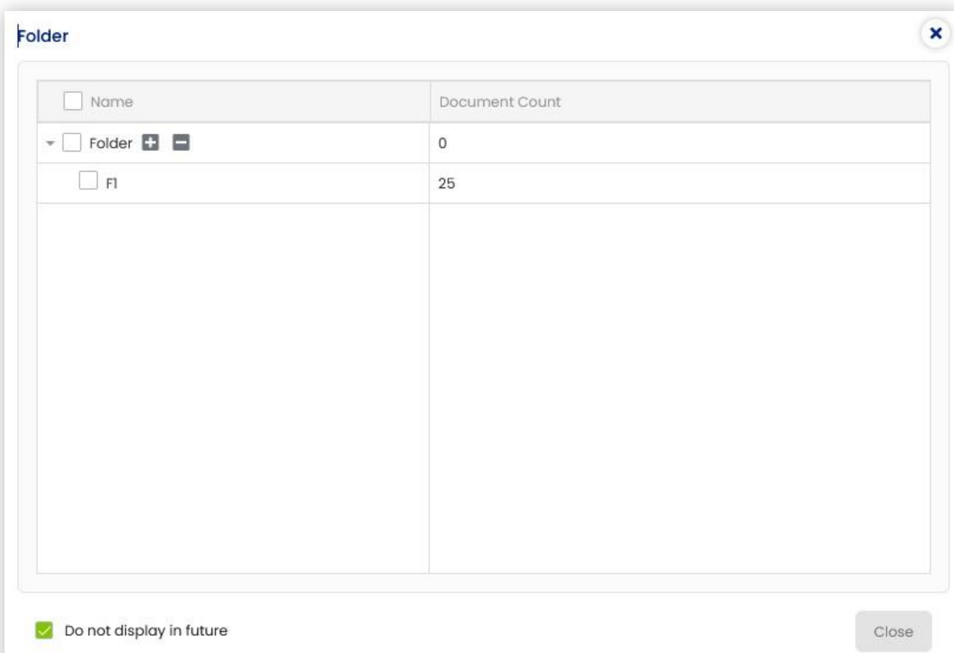


Select a user group using the Select User Group drop-down list.
Select the Enable Document Restriction check box.
Select the By Folder option.
Place checks to select the folders you wish to restrict.
Click the Save button.



When a restricted user logs in, the documents within the restricted folder(s) will not displayed on Analyze Dashboard or the Review Dashboard.

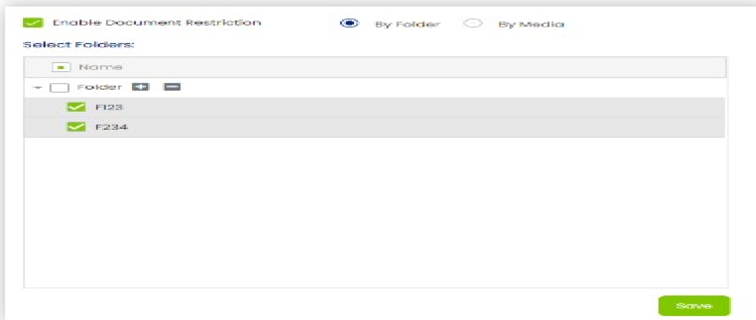
When a user is restricted to viewing only certain folders, the Folder dialog displays when the user accesses the Review Dashboard. To keep from seeing it every time, the Do not display in future checkbox can be selected by the user.



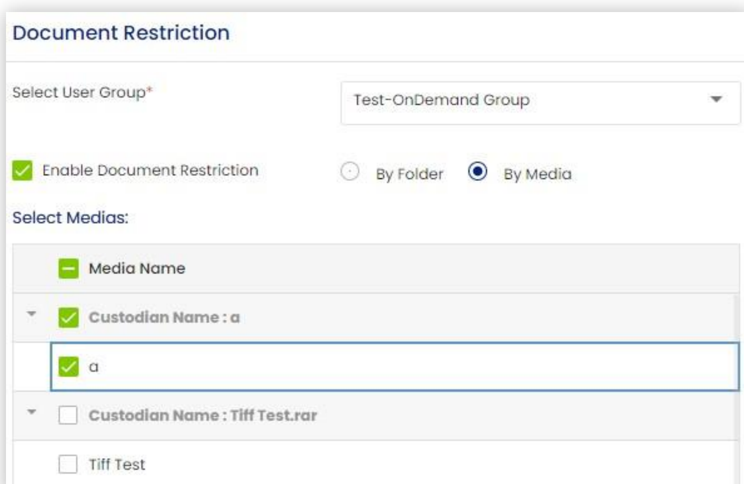
12.24.2 Restrict Document Access by Media

Click the drop-down arrow next to your name in the top right corner.
Click Admin Settings > Case Admin > Document Restriction.

The Document Restriction dialog displays.

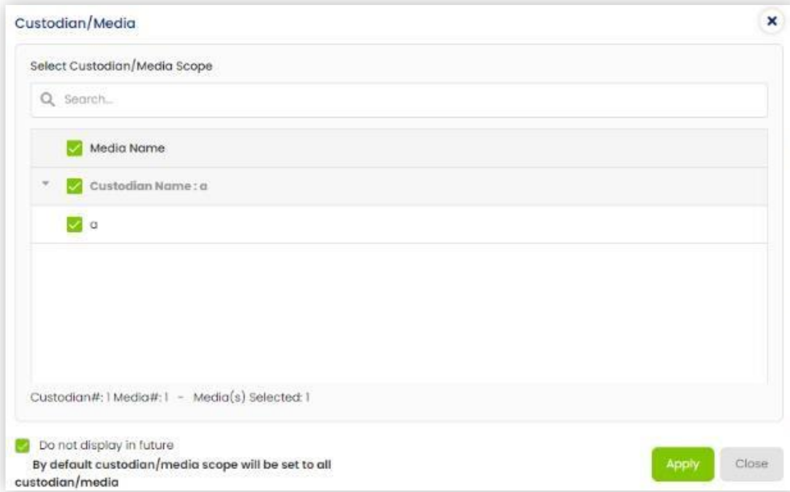


Select a user group using the Select User Group drop-down list.
Select the Enable Document Restriction check box.
Select the By Media option.
Place checks to select the media you wish to restrict.
Click the Save button.



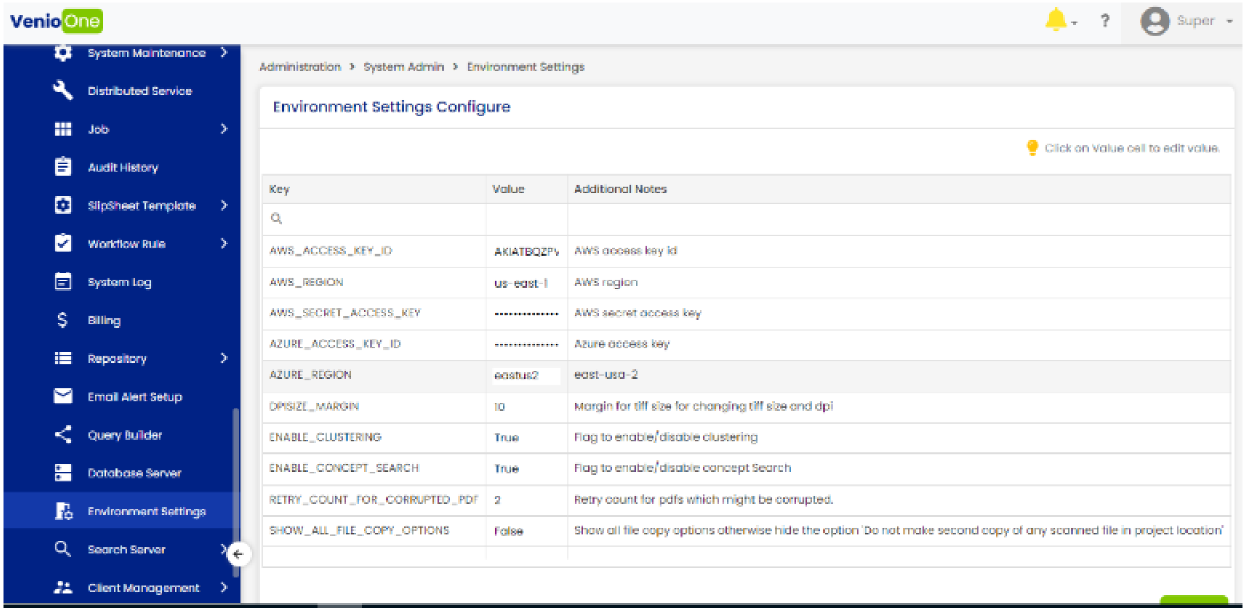
When a restricted user logs in, the documents within the restricted media will not displayed on Analyze Dashboard or the Review Dashboard.

When a user is restricted to viewing only certain Custodians/Media, the Custodian/Media dialog displays when the user accesses the Review Dashboard. To keep from seeing it every time, the Do not display in future checkbox can be selected.



12.25 Environment Settings Configure

The Setting shown in the UI are the values which are from the database whose values are isvisible as 1 from controlsetting table from VenioPCD.
The settings are in the Key/Value pair, the values which have ********** are the values which has the column isencrypted values as 1 in the control setting table of Venio Control Database (VenioPCD)


VenioOne
Super
System Maintenance
Distributed Service
Job
Audit History
SlipSheet Template
Workflow Rule
System Log
Billing
Repository
Email Alert Setup
Query Builder
Database Server
Environment Settings
Search Server
Client Management
Administration > System Admin > Environment Settings
Environment Settings Configure
Click on Value cell to edit value.
Key
Value
Additional Notes
AWS_ACCESS_KEY_ID
AKIATBQZPV
AWS access key id
AWS_REGION
us-east-1
AWS region
AWS_SECRET_ACCESS_KEY
AWS secret access key
AZURE_ACCESS_KEY_ID
Azure access key
AZURE_REGION
eastus2
east-usa-2
DPISIZE_MARGIN
10
Margin for tiff size for changing tiff size and dpi
ENABLE_CLUSTERING
True
Flag to enable/disable clustering
ENABLE_CONCEPT_SEARCH
True
Flag to enable/disable concept Search
RETRY_COUNT_FOR_CORRUPTED_PDF
2
Retry count for pdfs which might be corrupted.
SHOW_ALL_FILE_COPY_OPTIONS
False
Show all file copy options otherwise hide the option 'Do not make second copy of any scanned file in project location'

13 VOD Reporting

The purpose of a report is to communicate information, usually to set targets or to show a general view of the results of the research in a subject matter. Just as in the VenioOne Desktop Console, VOD's Reports module provides functionality for generating reports in two broad categories – User Reports and Admin Reports.

To generate reports in VOD:

Select any tab (Upload / Analyze / Review / Produce) of any project from the VOD case launchpad.

Navigate to the Reports tab.

13.1 Levels of Report Generation

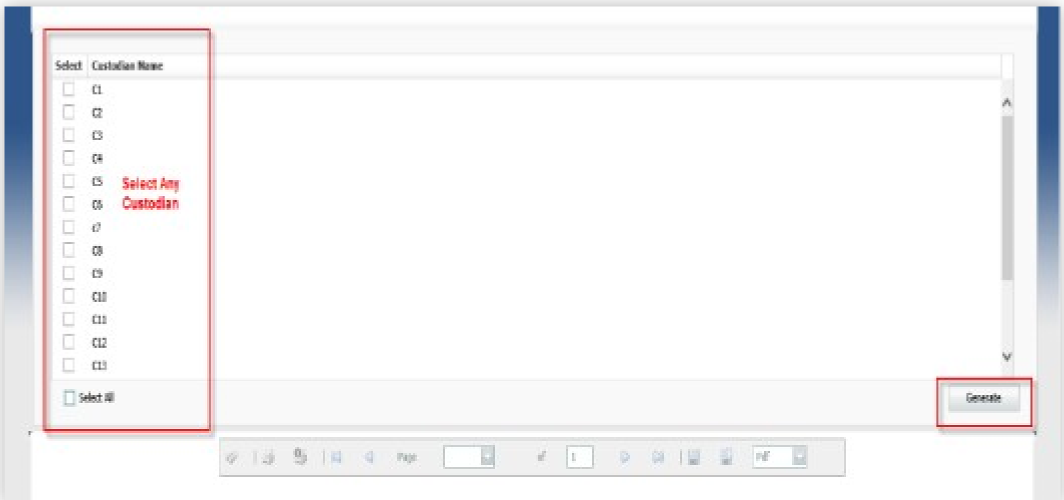
The different levels in which reports can be generated are:

- Project Level: Generates a report on the whole Project in the respective report type.
- Custodian Level: Generates a report according to the Custodian in the respective report type.
- Media Level: Generate a report according to the Media in the respective report type.

13.1.1 Generating Custodian Level Reports

To start, select the Custodian(s) you want to report from and click the Generate button.

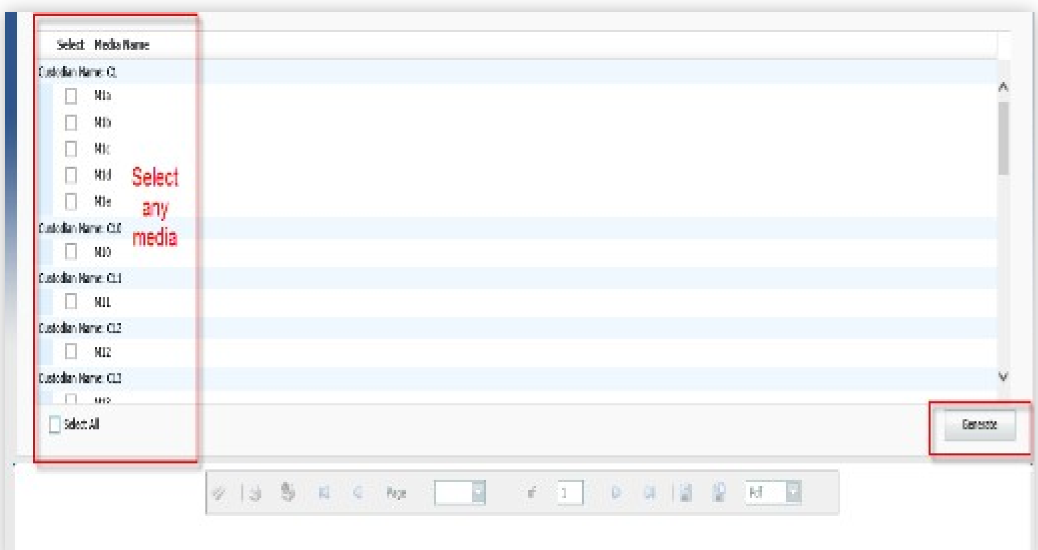
NOTE: To select all the custodians, check the Select All option at the bottom.



13.1.2 Generating Media Level Reports

To start, select the Media you want to report from and click the Generate button.

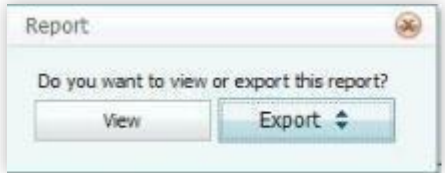
NOTE: To select all media, check the Select All option at the bottom.



13.2 Report View / Export

After a report is generated (Project, Custodian or Media Level), the following options are available:

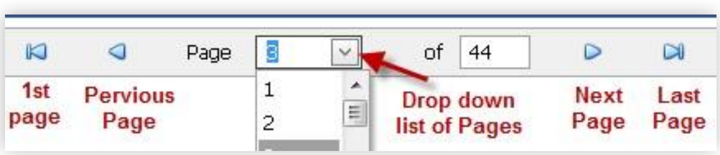
- View: Opens a new window to view the report.
- Export: Exports the report in the selected file type.



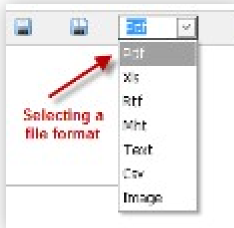
The available file types for exporting reports are:

13.3 Report Toolbar

The report toolbar is enabled after a report is generated and has the options listed below:



Display the Search dialog.
Print report to your local printer.
Print current page to your local printer.
Navigate to different report pages. You can either use the arrows or the page number list.
Export a report and Save it to disk.
Export a report and Open it in a new window.
Export Format

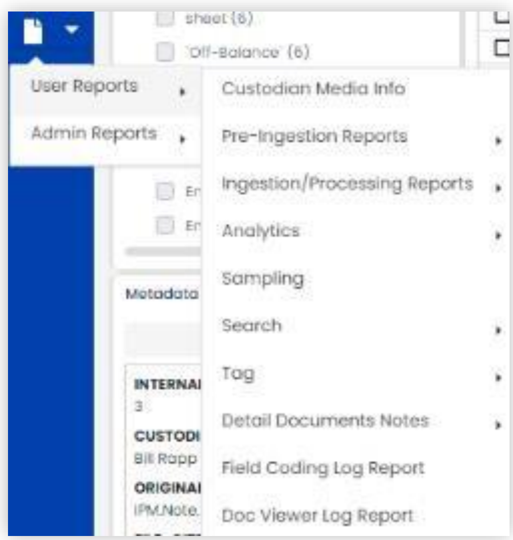


13.4 User Reports

In VOD, you can create User Reports that will give you information pertaining to the data in your project. All our reports are updated with the new logo.

User Reports fall into the following main categories. For detailed information, refer to the respective report sections below.

- Custodian Media Info
- Pre-Ingestion Reports
- Ingestion/Processing Reports
- Analytics Reports
- Sampling Report
- Search Reports
- Tag Reports
- Detailed Document Notes Report
- Field Coding Log Report
- Doc Viewer Log Report



13.4.1 Custodian Media Info Report

The Custodian Media Info Report gives you general information about the data that you have loaded.

To generate a Custodian Media Info report for the project, navigate to Reports > User Reports > Custodian Media Info.

The report header will include the Project Name, Report Generated Date and Report Created By.

Venio

In the Custodian Media Info report, the following details will be included:

- The Custodian Name in the project.
- The Media Names associated with each Custodian.
- Notes about the associated custodian will be displayed.
- The Drill Level (either All, 1 or 2, as specified during project creation).
- Base Path showing the path or link to the Folder where the Media is indexed.
- Scanned Status:
    - Scanned: If the media in the particular custodian is scanned.
    - Not Scanned: If the media in the particular custodian is not scanned.
- Ingested Status:
    - Processed: If the media in the particular custodian is processed.
    - Not processed: If the media in the particular custodian is not processed.
    - Processing: If the media in the particular custodian is not fully processed.
- Scanned Size:
    - If the media is scanned, it will show the scanned size.
    - If the media is not scanned, it will show as 0.00MB
- Scanned Count:
    - If the Media is scanned, it will show the scanned count.
    - If the Media is not scanned, it will not show any count and will appear blank.

Custodian Media Information

Project Name: Enron Demo Project
Report Generated Date: 11/17/2016 4:20:58 AM
Report Created By: Techwriter

Custodian Name	Media Name	Drill Level	Note	Base Path	Scanned Status	Ingested Status	Scanned Size	Scanned Count
Albert Myers	albert_meyers_000 PST	All		\\NFSROOT\zpool1_volume1_share1\VenioTestData\Enron\albert_meyers_000.pst	Scanned	Processed	12.37 MB	1
Andy Zipper	andy_zipper_000	All		\\NFSROOT\zpool1_volume1_share1\VenioTestData\600GB -Copied from Seagate Backup Drive\EDRM_enron\andy_zipper_000.pst	Scanned	Processed	404.95 MB	1
Brad Mckay	brad_mckay_000	All		\\NFSROOT\zpool1_volume1_share1\VenioTestData\600GB -Copied from Seagate Backup Drive\EDRM_enron\brad_mckay_000.pst	Scanned	Processed	62.02 MB	1
Chris Stokley	chris_stokley_000	All		\\NFSROOT\zpool1_volume1_share1\VenioTestData\600GB -Copied from Seagate Backup Drive\EDRM_enron\chris_stokley_000.pst	Scanned	Processed	108.52 MB	1

13.4.2 Pre-Ingestion Reports

Venio

The Pre-Ingestion Info Reports give you information pertaining to files you have scanned but not processed.

13.4.2.1 Scan File Summary

To generate a Scan File Summary report, go to Report > User Reports > Pre-Ingestion Reports > Scan File Summary. You will then need to choose whether you want a Project Level or Custodian Level report.

13.4.2.1.1 Project Level

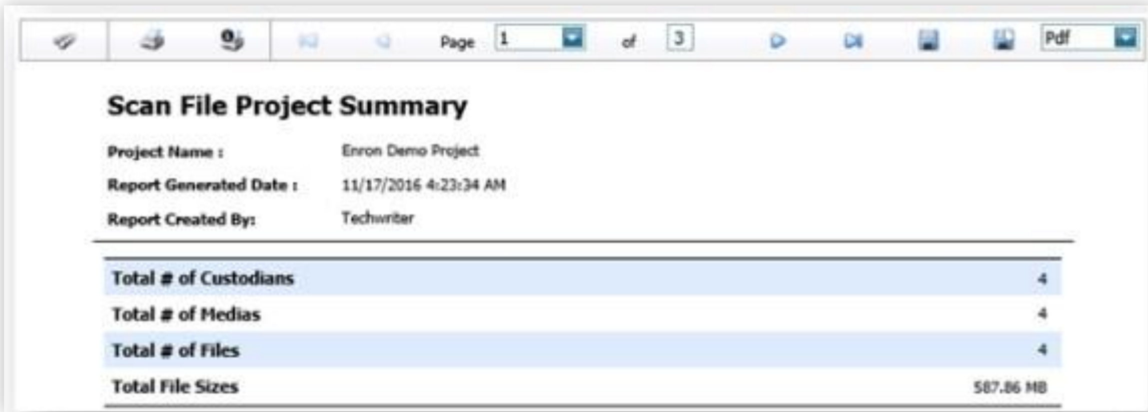
The report header will include the Project Name, Report Generated Date and Report Created By.

In the Scan File Summary report, the following details will be included:

- Total # of Custodians
- Total # of Media
- Total # of Files
- Total File Size

The following details will be displayed in Pie Chart format. Use the toolbar at the top to navigate:

- Top 10 File Extensions
    - 0 File Counts: Shows the count of the Top 10 file extensions in the media
    - ○ File Size: Shows the total file sizes for the Top 10 file extensions
- Top 10 File Sizes
    - 0 o File Counts: Shows the count of the Top 10 files with the largest file sizes
    - ○ o File Size: Shows the total file sizes for the Top 10 files with maximum size

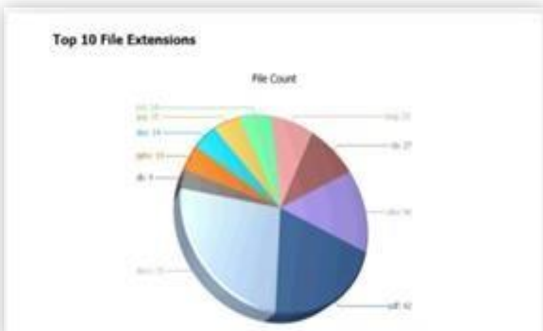


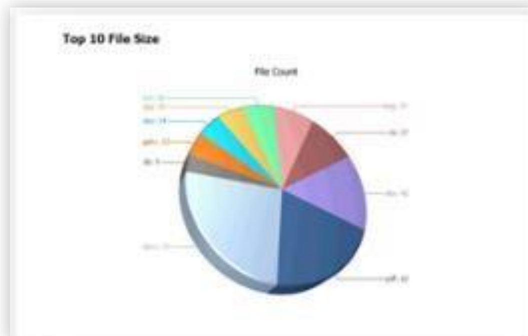
Page 1 of 3 Pdf

Scan File Project Summary

Project Name :	Enron Demo Project
Report Generated Date :	11/17/2016 4:23:34 AM
Report Created By:	Techwriter

Total # of Custodians	4
Total # of Medias	4
Total # of Files	4
Total File Sizes	587.86 MB





13.4.2.1.2 Custodian Level

Report is generated on a Custodian Level. You will need to Select the Custodian(s) you wish to view in your report. Check the desired Custodians and then click Generate.

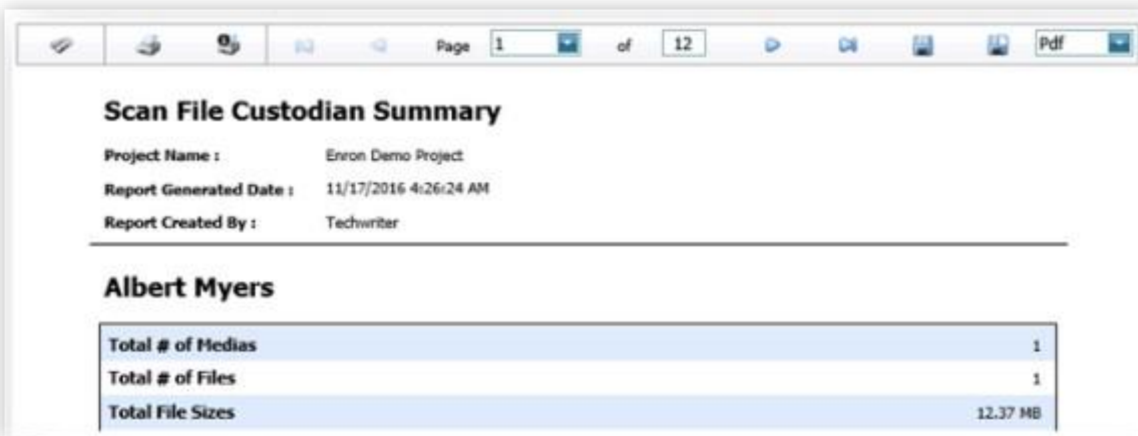
The report header will include the Project Name, Report Generated Date, Report Created By, and Custodian Selected.

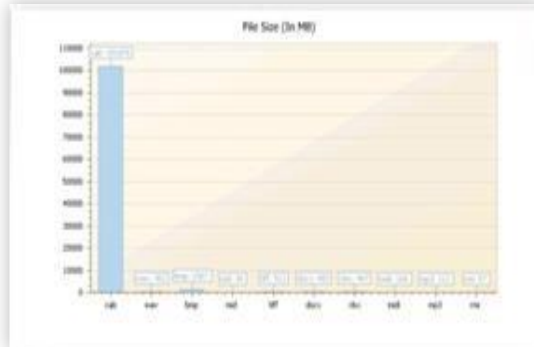
In the Scan File Summary report, the following details will be included for each Custodian selected:

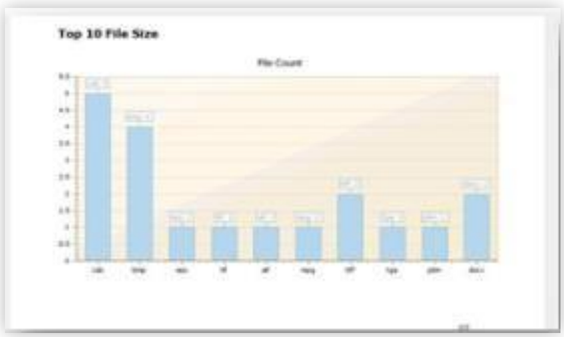
- Total # of Media
- Total # of Files
- Total File Size

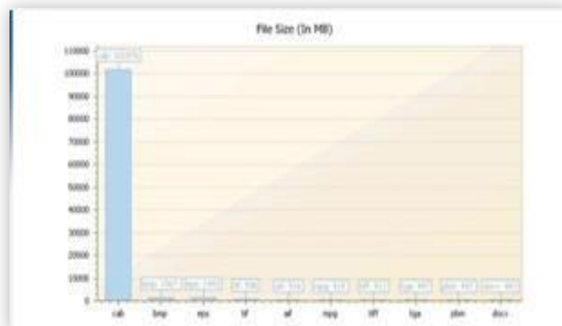
The following details will be displayed in Bar Chart format for each custodian selected. Use the toolbar at the top to navigate:

- Top 10 File Extensions
  - 0 File Counts: Shows the count of the Top 10 file extensions in the media
  - ○ File Size: Shows the total file sizes for the Top 10 file extensions
- Top 10 File Sizes
  - 0 File Counts: Shows the count of the Top 10 files with the largest file sizes
  - ○ File Size: Shows the total file sizes for the Top 10 files with maximum size









13.4.2.2 Scan File Extension Summary Report

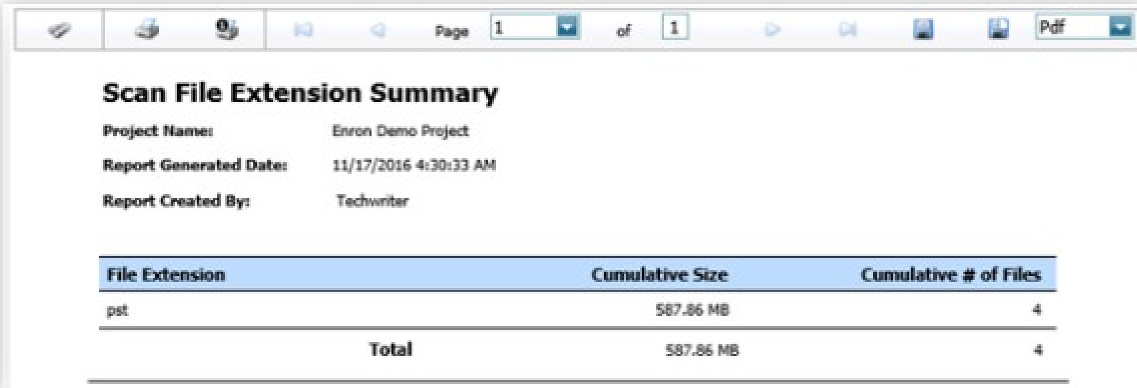
To generate a Scan File Extension Summary report, go to Report > User Reports > Pre-Ingestion Reports > Scan File Extension Summary. You will then need to choose whether you want a Project Level or Custodian Level report.

13.4.2.2.1 Project Level

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Scan File Extension Summary report, the following details will be included:

- File Extension: Lists the extensions of all the files in the media
- Cumulative Size: Shows the size of the files corresponding to the file extensions
- Cumulative # of Files: Shows the number of files corresponding to the file extensions



Page 1 of 1 Pdf

Scan File Extension Summary

Project Name: Enron Demo Project

Report Generated Date: 11/17/2016 4:30:33 AM

Report Created By: Techwriter

File Extension	Cumulative Size	Cumulative # of Files
pst	587.86 MB	4
Total	587.86 MB	4

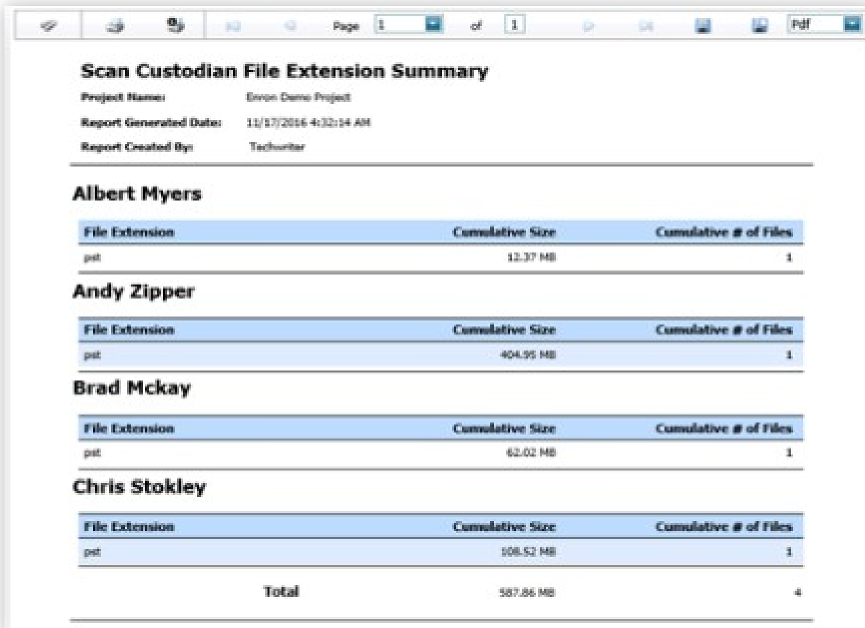
13.4.2.2.2 Custodian Level

Report is generated on a Custodian Level. You will need to select the Custodians you wish to view in your report. Check the desired Custodians and click Generate.

The report header will include the Project Name, Report Generated Date, Report Created By and Custodian Selected.

In the Scan File Extension Summary report, the following details will be included for each Custodian selected:

- File Extension: Lists the extensions of all the files in the media
- Cumulative Size: Shows the size of the files corresponding to the file extensions
- Cumulative # of Files: Shows the number of files corresponding to the file extensions



Scan Custodian File Extension Summary

Project Name:	Enron Demo Project
Report Generated Date:	11/17/2016 4:32:14 AM
Report Created By:	Techwriter

Albert Myers

File Extension	Cumulative Size	Cumulative # of Files
pst	12.37 MB	1

Andy Zipper

File Extension	Cumulative Size	Cumulative # of Files
pst	404.95 MB	1

Brad Mckay

File Extension	Cumulative Size	Cumulative # of Files
pst	62.02 MB	1

Chris Stokley

File Extension	Cumulative Size	Cumulative # of Files
pst	108.52 MB	1
Total	587.86 MB	4

13.4.2.3 Scan File Inventory Report

To generate a Scan File Inventory report, go to Report > User Reports > Pre-Ingestion Reports > Scan File Inventory. You will then need to select whether you want a Project Level or Custodian Level report.

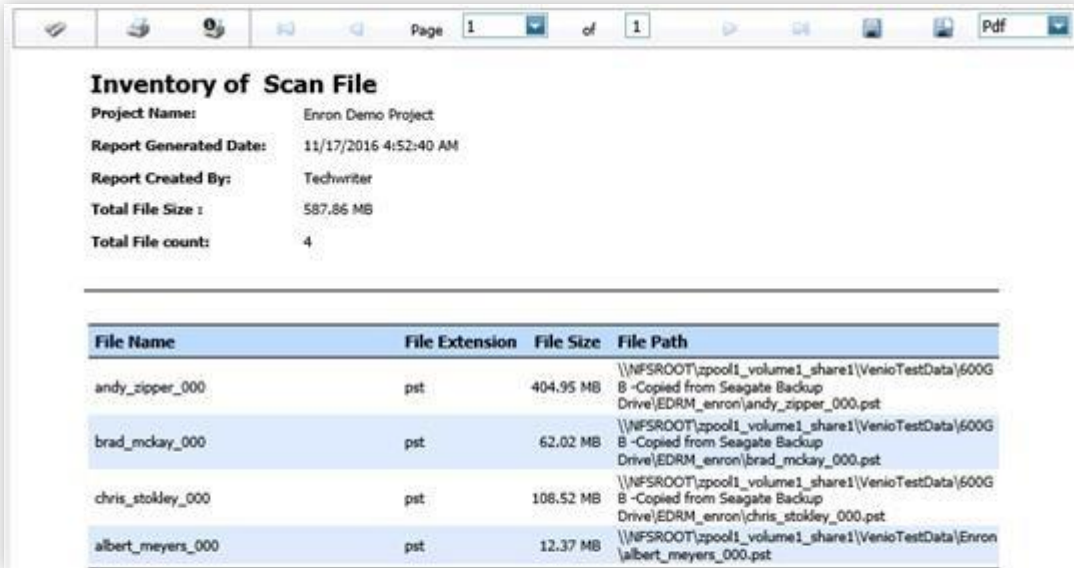
13.4.2.3.1 Project Level

The report header will include the Project Name, Report Generated Date, Report Created By, Total File Size and Total File Count.

NOTE: This report could contain many pages as it reports on all files in your project. Be aware of this if you plan on exporting the report.

In the Scan File Inventory report, the following details will be included:

- File Name: Name of each file scanned, in alphabetical order
- File Extension: File extension corresponding to each file listed
- File Size: File size corresponding to each file listed
- File Path: Path to where each file listed is stored


Page 1 of 1 Pdf

Inventory of Scan File

Project Name: Enron Demo Project
Report Generated Date: 11/17/2016 4:52:40 AM
Report Created By: Techwriter
Total File Size : 587.86 MB
Total File count: 4

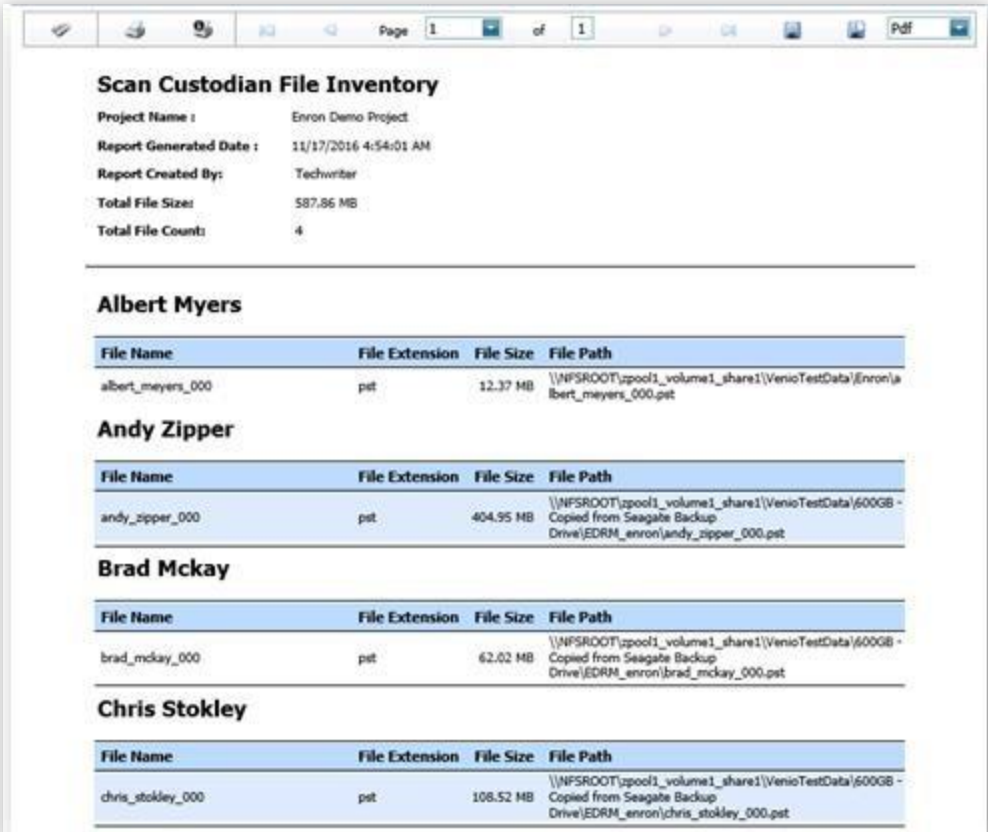
File Name	File Extension	File Size	File Path
andy_zipper_000	pst	404.95 MB	\\NFSROOT\zpool1_volume1_share1\VenioTestData\600GB -Copied from Seagate Backup Drive\EDRM_enron\andy_zipper_000.pst
brad_mckay_000	pst	62.02 MB	\\NFSROOT\zpool1_volume1_share1\VenioTestData\600GB -Copied from Seagate Backup Drive\EDRM_enron\brad_mckay_000.pst
chris_stokley_000	pst	108.52 MB	\\NFSROOT\zpool1_volume1_share1\VenioTestData\600GB -Copied from Seagate Backup Drive\EDRM_enron\chris_stokley_000.pst
albert_meyers_000	pst	12.37 MB	\\NFSROOT\zpool1_volume1_share1\VenioTestData\Enron\albert_meyers_000.pst

13.4.2.3.2 Custodian Level

Report is generated on a Custodian Level. You will need to select the Custodians you wish to view in your report. Check the desired Custodians and click Generate.

The report header will include the Project Name, Report Generated Date, Report Created By, Total File Size, Total File Count and Custodian Selected.
In the Scan File Inventory report, the following details will be included for each Custodian selected:

- File Name: Name of each file scanned, in alphabetical order
- File Extension: File extension corresponding to each file listed
- File Size: File size corresponding to each file listed
- File Path: Path to where each file listed is stored



Scan Custodian File Inventory

Project Name :	Enron Demo Project
Report Generated Date :	11/17/2016 4:54:01 AM
Report Created By:	Techwriter
Total File Size:	587.86 MB
Total File Count:	4

Albert Myers

File Name	File Extension	File Size	File Path
albert_meyers_000	pst	12.37 MB	\\NFSROOT\zpool1_volume1_share1\VenioTestData\Enron\albert_meyers_000.pst

Andy Zipper

File Name	File Extension	File Size	File Path
andy_zipper_000	pst	404.95 MB	\\NFSROOT\zpool1_volume1_share1\VenioTestData\600GB - Copied from Seagate Backup Drive\EDRM_enron\andy_zipper_000.pst

Brad Mckay

File Name	File Extension	File Size	File Path
brad_mckay_000	pst	62.02 MB	\\NFSROOT\zpool1_volume1_share1\VenioTestData\600GB - Copied from Seagate Backup Drive\EDRM_enron\brad_mckay_000.pst

Chris Stokley

File Name	File Extension	File Size	File Path
chris_stokley_000	pst	108.52 MB	\\NFSROOT\zpool1_volume1_share1\VenioTestData\600GB - Copied from Seagate Backup Drive\EDRM_enron\chris_stokley_000.pst

13.4.3 Ingestion/Processing Reports

Ingestion/Processing Reports give you information pertaining to the files imported into the system for each custodian/media. They are broken down further into Ingestion Reports on Scanned Files and Ingestion Reports on Expanded Files.

13.4.3.1 Ingestion Project Summary Report on Scanned Files

To generate a Summary report, go to Report > User Reports > Ingestion/Processing Reports > Ingestion Reports on Scanned Files > Ingestion Project Summary on Scanned Files. You will then need to choose whether you want a Project Level, Custodian Level or Media Level report.

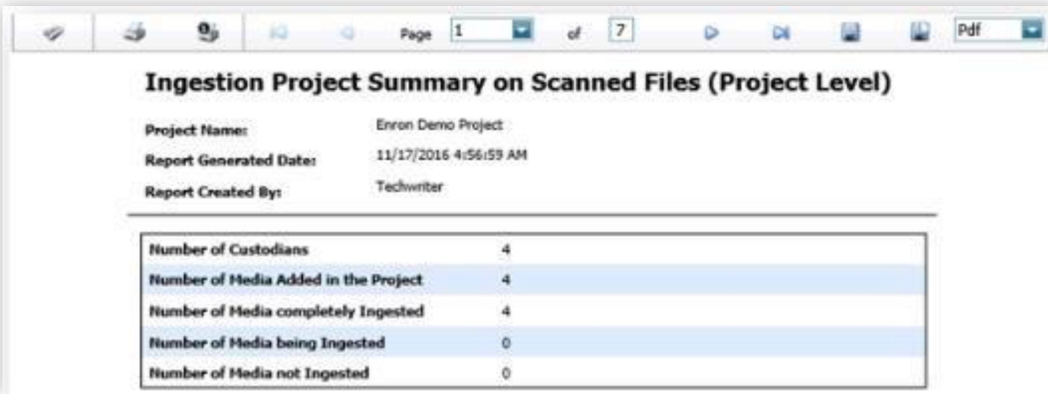
13.4.3.1.1 Project Level

Report is generated on the Project Level. The report header will include the Project Name, Report Generated Date, and Report Created By.

In the Ingestion Summary report, the following details will be included:

- Total # of Custodians

- Total # of Medias Added to Project
- Number of Media Completely Ingested
- Number of Media Being Ingested
- Number of Media Not Ingested


Page 1 of 7 Pdf

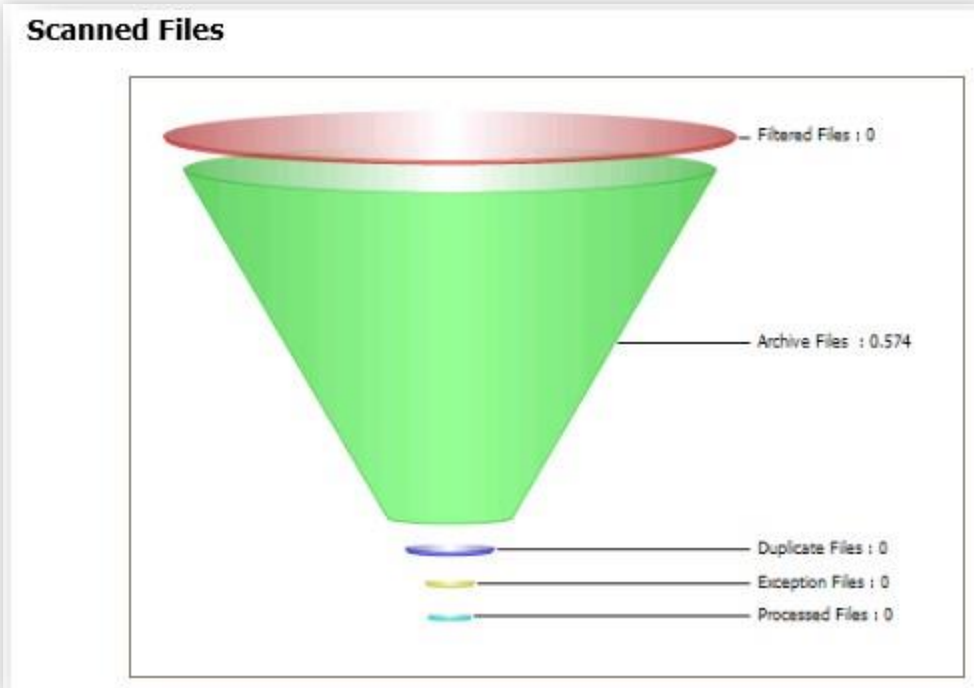
Ingestion Project Summary on Scanned Files (Project Level)

Project Name: Enron Demo Project
Report Generated Date: 11/17/2016 4:56:59 AM
Report Created By: Techwriter

Number of Custodians	4
Number of Media Added in the Project	4
Number of Media completely Ingested	4
Number of Media being Ingested	0
Number of Media not Ingested	0

Ingestion Project Summary on Scanned Files – Detail Diagrams In

a funnel chart, you will see an overview of the Scanned Files:

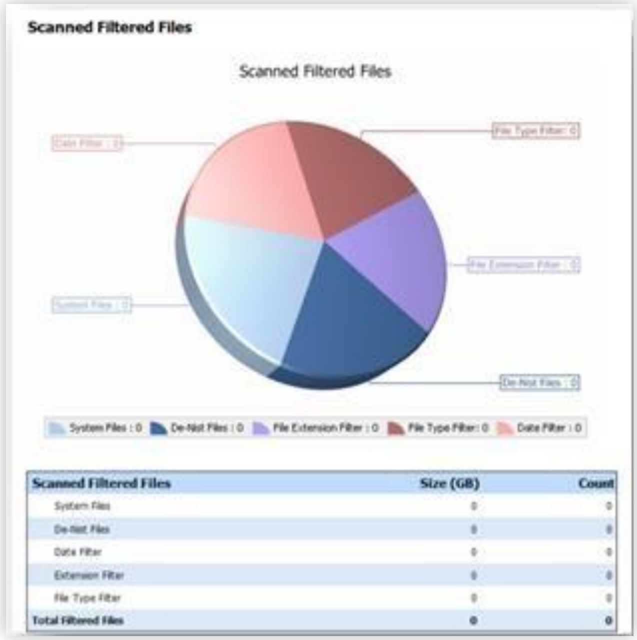


Scanned Files	Size (GB)	Count
Filtered Files	0	0
Exception Files	0	0
Archive Files	0.574	4
Processed Files	0	0
Total Scanned Files (Without Duplicates)	**0.574**	**4**
Duplicates of Processed & Exceptions Files	**0**	**0**
Total Scanned Files (Including Duplicates)	**0.574**	**4**

Note: Non-Zero numbers that are smaller than 0.001 are shown as ~0.001 1/7

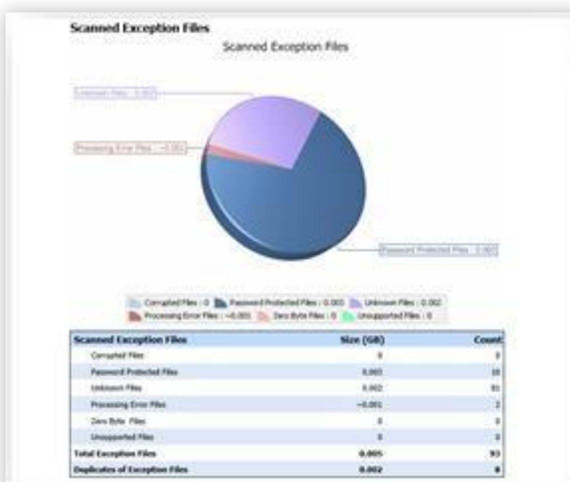
- Scanned Files (Filtered, Exception, Archives, Duplicate, Processed)
- Total Scanned Files (Without Duplicates)
- Duplicates of Processed & Exception Files
- Total Scanned Files (Including Duplicates)

In the pie charts that follow, you will see detailed information about your Scanned Files:
Scanned Filtered Files



- Total # System Files
- Total # De-Nist Files
- Total # Date Filter
- Total # Extension Filter
- Total # File Type Filter
- Total Filtered Files

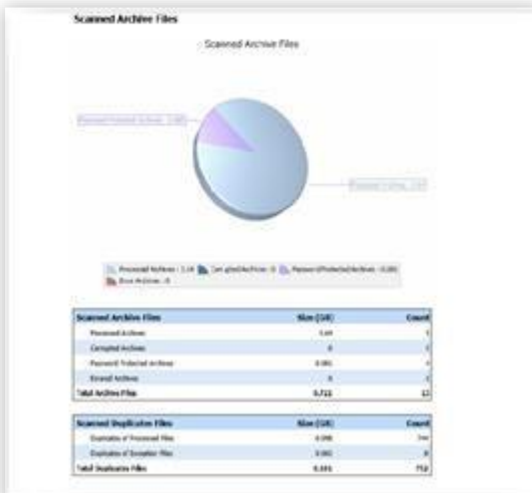
Scanned Exception Files



- Total Corrupted Files

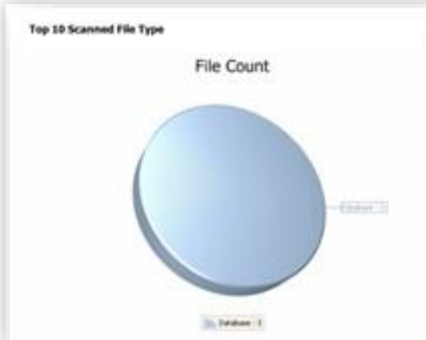
- Total Password Protected Files
- Total Unknown Files
- Total Processing Error Files
- Total Zero Byte Files
- Total Unsupported Files
- Total Exception Files
- Total Duplicate of Exception Files

Scanned Archive Files



- Total Processed Archives
- Total Corrupt Archives
- Total Password Protected Archives
- Total Error Archives
- Total Archived Files
- Scanned Duplicates Files
- Total Duplicates of Processed Files
- Total Duplicates of Exception Files

Top 10 Scanned File Types



On the last page is the List of Media(s).

List of Media(s)

Custodian Name	Media Name	Base Path	Size (GB)	Count
C15	M15d	\\100.100.100.9\Dristi_Development\Venio_QC\Sample for release\Sample for release\EDOCS\Edsocs	0.034	99
C16	M16	\\100.100.100.9\Dristi_Development\Venio_QC\Sample for release\Sample for release\2007_files	0.028	24
nsf	nsfjconetta	\\100.100.100.9\dristi_development\Venio_Client\CLient_Data\NSF\nsf\nsf\jconetta.nsf	0.573	1
i	i		0.431	2,769

- Custodian Name
- Media Name
- Base Path
- File Size (GB) per Media
- File Count per Media
- Total Size and Count of Files

13.4.3.1.2 Custodian Level

Report is generated on a Custodian Level. You will need to select the Custodians you wish to view in your report. Check the desired Custodians and click Generate.

Ingestion Project Summary on Scanned Files (Custodian Level)

Project Name:	Enron Demo Project
Report Generated Date:	11/17/2016 5:01:36 AM
Report Created By:	Techwriter

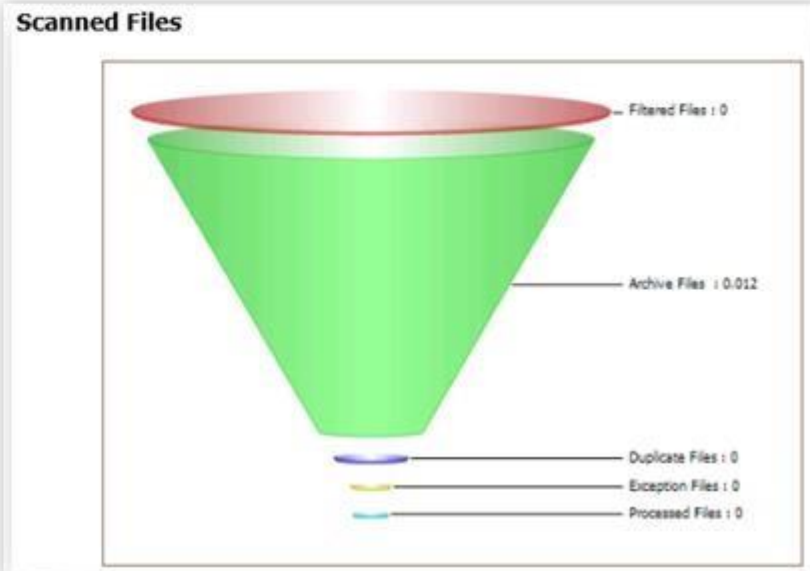
Custodian Name	Albert Myers
Number of Media Added in the Custodian	1
Number of Media completely Ingested	1
Number of Media being Ingested	0
Number of Media not Ingested	0

The report header will include the Project Name, Report Generated Date, Report Created By and Custodian Selected.

In the Ingestion Project Summary on Scanned Files (Custodian Level) report, the following details will be included for each Custodian selected:

- Custodian Name
- Number of Media Added to Custodian
- Number of Media Completely Ingested
- Number of Media Being Ingested
- Number of Media Not Ingested

The diagrams that follow provide specific information regarding your scanned files. Refer to the Project Level diagrams for reference. If you have more than one custodian, you will need to page through each custodian using the page arrows or by selecting a specific report page at the top.



Scanned Files	Size (GB)	Count
Filtered Files	0	0
Exception Files	0	0
Archive Files	0.012	1
Processed Files	0	0
Total Scanned Files (Without Duplicates)	**0.012**	**1**
Duplicates of Processed & Exceptions Files	**0**	**0**
Total Scanned Files (Including Duplicates)	**0.012**	**1**

Note: Non-Zero numbers that are smaller than 0.001 are shown as ~0.001 1/28

13.4.3.1.3 Media Level

Report is generated on a Media Level. You will need to select the Custodians and the Media you wish to view in your report. Check the desired Medias and click Generate.

The report header will include the Project Name, Report Generated Date, Report Created By, and Custodian and Media Selected.

The generated diagrams provide specific information regarding your scanned files. Refer to the Project Level diagrams for reference. If you have more than one media, you will need to page through each media using the page arrows or by selecting a specific report page at the top.

13.4.3.2 Filtered Files Detail Reports

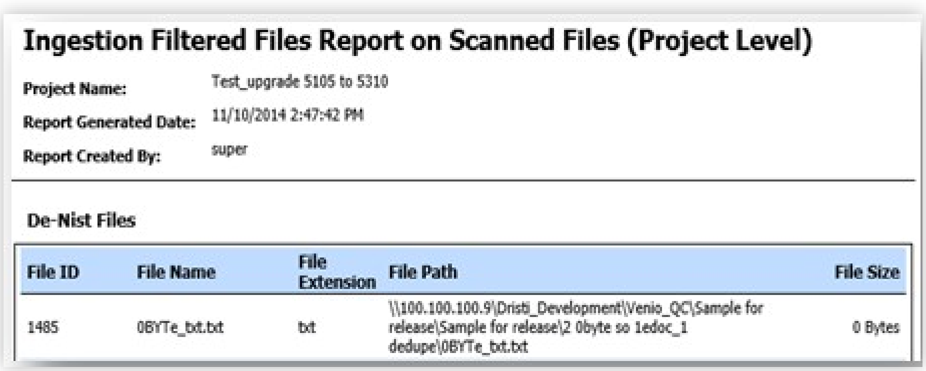
To generate a Filtered Files Detail report, go to Report > User Reports > Ingestion/Processing Reports > Ingestion Reports on Scanned Files > Filtered Files Detail Reports. You will then need to choose whether you want a Project Level, Custodian Level or Media Level report.

Select the type of Filter File you want to report on. You can choose from De-Nist Files, System Files, Date Filtered Files, Extension Filtered Files and/or File Type Filtered Files. Click Generate to continue.

NOTE: If there are no filtered files, you will receive the following message. Click OK to continue.

If any file type is filtered the following details will be included:

- Project Name
- Report Generated Date
- Report Created By
- File Type Filter (De-Nist Files, System Files, Date Filtered Files, Extension Filtered Files and/or File Type Filtered Files)
- File ID
- File Name
- File Extension
- FilePath
- File Size



Ingestion Filtered Files Report on Scanned Files (Project Level)

Project Name: Test_upgrade 5105 to 5310
Report Generated Date: 11/10/2014 2:47:42 PM
Report Created By: super

De-Nist Files

File ID	File Name	File Extension	File Path	File Size
1485	0BYTe_txt.txt	txt	\\100.100.100.9\Dristi_Development\Venio_QC\Sample for release\Sample for release\2 0byte so 1edoc_1 dedupe\0BYTe_txt.txt	0 Bytes

13.4.3.2.1 Custodian Level

Venio

Report is generated on a Custodian Level. You will need to select the Custodians you wish to view in your report. Check the desired Custodians and click Generate.


Ingestion Filtered Files Report on Scanned Files (Custodian Level)

Project Name: Test_upgrade 5105 to 5310
Report Generated Date: 11/10/2014 2:52:22 PM
Report Created By: super

Custodian Name: C1

De-Nist Files

File ID	File Name	File Extension	File Path	File Size
1485	0BYTe_txt.txt	txt	\\100.100.100.9\Dristi_Development\Venio_QC\Sample for release\Sample for release\2 0byte so 1edoc_1 dedupe\0BYTe_txt.txt	0 Bytes
1486	123.docx	docx	\\100.100.100.9\Dristi_Development\Venio_QC\Sample for release\Sample for release\2 0byte so 1edoc_1 dedupe\123.docx	0 Bytes

The following details will be included:

- Project Name
- Report Generated Date
- Report Created By
- Custodian Name
- File Type Filter (De-Nist Files, System Files, Date Filtered Files, Extension Filtered Files and/or File Type Filtered Files)
- File ID
- File Name
- File Extension
- FilePath
- File Size

13.4.3.2.2 Media Level

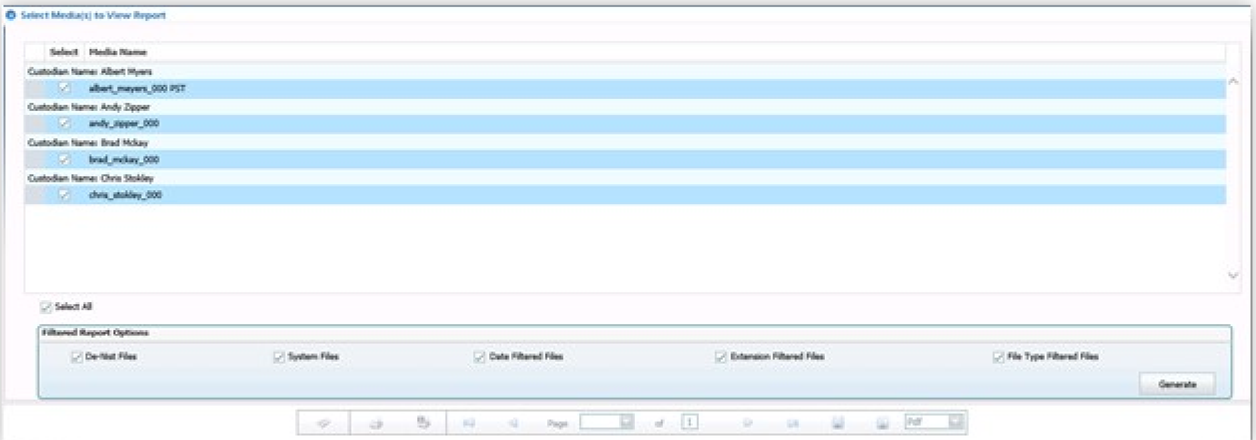
Report is generated on a Media Level. You will need to select the Custodians and the Medias you wish to view in your report. Check the desired Medias and click Generate.

The following details will be included:

- Project Name
- Report Generated Date
- Report Created By
- Custodian Name
- Media Name
- File Type Filter (De-Nist Files, System Files, Date Filtered Files, Extension Filtered Files and/or File Type Filtered Files)
- File ID

- File Name

File Extension
FilePath
File Size

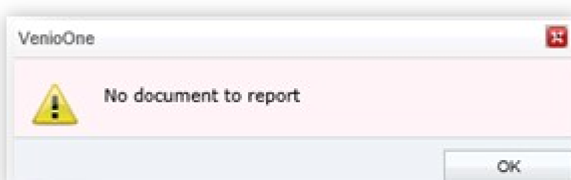


13.4.3.3 Exception Files Detail Reports

To generate an Exception Files Detail report, go to Report > User Reports > Ingestion/Processing Reports > Ingestion Reports on Scanned Files > Exception Files Detail Reports. You will then need to choose whether you want a Project Level, Custodian Level or Media Level report.

Select the type of Exception File you want to report on. Choose from Corrupted Files, Password Protected Files, Unknown Files and/or Processing Error Files. Click Generate to continue.

NOTE: If there are no exception files, you will receive the following message. Click OK to continue.

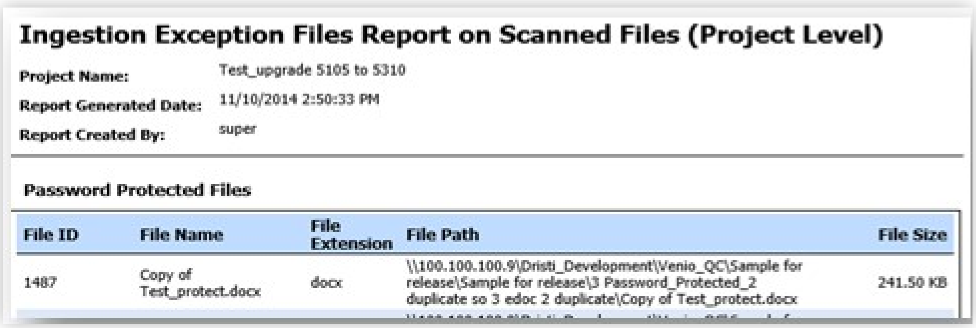


If any file type is filtered the following details will be included in the report:

- Project Name
- Report Generated Date
- Report Created BY

- Exception File type (*Corrupted Files, Password Protected Files, Unknown Files* and/or *Processing Error Files*)
- FileID
- File Name

File Extension
File Path
File Size



Ingestion Exception Files Report on Scanned Files (Project Level)

Project Name:	Test_upgrade 5105 to 5310
Report Generated Date:	11/10/2014 2:50:33 PM
Report Created By:	super

Password Protected Files

File ID	File Name	File Extension	File Path	File Size
1487	Copy of Test_protect.docx	docx	\\100.100.100.9\Dristi_Development\Venio_QC\Sample for release\Sample for release\3 Password_Protected_2 duplicate so 3 edoc 2 duplicate\Copy of Test_protect.docx	241.50 KB

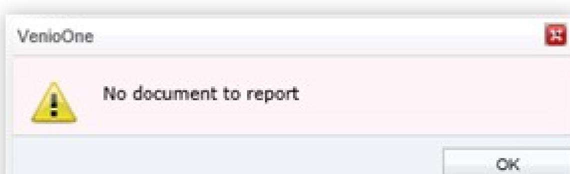
For custodian level the report will be generated based on the custodians selected, and for media level, the report will be generated as per the media selected under the custodian.

13.4.3.4 Archive Files Detail Reports

To generate an Archive Files Detail report, go to Report > User Reports > Ingestion/Processing Reports > Ingestion Reports on Scanned Files > Archive Files Detail Reports. You will then need to choose whether you want a Project Level, Custodian Level or Media Level report.

Select the type of Archive File you want to report on. You can choose from Processed Archive Files, Corrupted Archive Files, Password Protected Archive Files and/or Errored Archive Files. Click Generate to continue.

NOTE: If there are no archive files, you will receive the following message. Click OK to continue.



If any file type is filtered, the following details will be included:

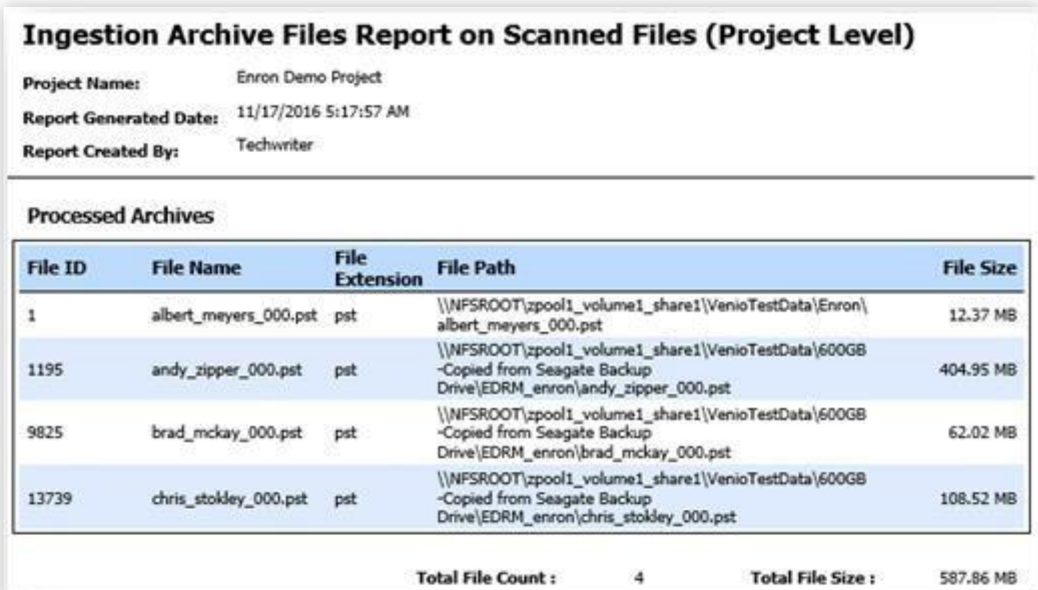
- Project Name

- Report Generated Date
- Report Created BY
- Exception File type (*Processed Archive Files, Corrupted Archive Files, Password Protected Archive Files* and/or *Errored Archive Files*)
- FileID
- File Name

File Extension

File Path

File Size



Ingestion Archive Files Report on Scanned Files (Project Level)

Project Name: Enron Demo Project

Report Generated Date: 11/17/2016 5:17:57 AM

Report Created By: Techwriter

Processed Archives

File ID	File Name	File Extension	File Path	File Size
1	albert_meyers_000.pst	pst	\\NFSROOT\zpool1_volume1_share1\VenioTestData\Enron\albert_meyers_000.pst	12.37 MB
1195	andy_zipper_000.pst	pst	\\NFSROOT\zpool1_volume1_share1\VenioTestData\600GB -Copied from Seagate Backup Drive\EDRM_enron\andy_zipper_000.pst	404.95 MB
9825	brad_mckay_000.pst	pst	\\NFSROOT\zpool1_volume1_share1\VenioTestData\600GB -Copied from Seagate Backup Drive\EDRM_enron\brad_mckay_000.pst	62.02 MB
13739	chris_stokley_000.pst	pst	\\NFSROOT\zpool1_volume1_share1\VenioTestData\600GB -Copied from Seagate Backup Drive\EDRM_enron\chris_stokley_000.pst	108.52 MB

Total File Count : 4 **Total File Size :** 587.86 MB

For custodian level, the report will be generated based on the custodians selected, and for media level, the report will be generated as per the media selected under the custodian.

13.4.3.5 Duplicate Files Detail Reports

To generate a Duplicate Files Detail report, go to Report > User Reports > Ingestion/Processing Reports > Ingestion Reports on Scanned Files > Duplicate Files Detail Reports. You will then need to choose whether you want a Project Level, Custodian Level or Media Level report.

Select the type of Duplicate File you want to report on. You can choose from Processed Duplicate Files and/or Exception Duplicate Files. Click Generate to continue.

NOTE: If there are no duplicate files, you will receive the following message. Click OK to continue.


VenioOne
No document to report
OK

If any file type is filtered the following details will be included:

- Project Name
- Report Generated Date
- Report Created BY
- Exception File type (*Processed Duplicate Files* and/or *Exception Duplicate Files*)
- FileID
- File Name
- File Extension
- File Path
- File Size

Ingestion Duplicate Files Report on Expanded Files (Project Level)

Project Name: Enron Demo Project
Report Generated Date: 11/17/2016 5:20:32 AM
Report Created By: Techwriter

Exception Duplicate Files

File ID	File Name	File Extension	File Path	File Size
8399	mime001.txt	txt	\\NFSROOT\zpool1_volume1_share1\VenioTestData\600GB -Copied from Seagate Backup Drive\EDRM_enron\andy_zipper_000.pst\andy_zipper_000\zipper-a\Andrew_Zipper_Nov2001\Notes Folders\All documents\Redraft of the Exclusivity Agreement.msg\mime001.txt	47.17 KB
8549	mime001.txt	txt	\\NFSROOT\zpool1_volume1_share1\VenioTestData\600GB -Copied from Seagate Backup Drive\EDRM_enron\andy_zipper_000.pst\andy_zipper_000\zipper-a\Andrew_Zipper_Nov2001\Notes Folders\Discussion threads\Redraft of the Exclusivity Agreement.msg\mime001.txt	47.17 KB
10407	WHYPALES.MPE	mpg	\\NFSROOT\zpool1_volume1_share1\VenioTestData\600GB -Copied from Seagate Backup Drive\EDRM_enron\brad_mckay_000.pst\brad_mckay_000\mckay-b\BMCKAY (Non-Privileged)\Mckay, Brad\Inbox\FW: Why Palestenians throw rocks.msg\WHYPALES.MPE	1.44 MB

For custodian level, the report will be generated based on the custodians selected, and for media level, the report will be generated as per the media selected under the custodian.

13.4.3.6 Ingestion Reports on Expanded Files

13.4.3.6.1 Ingestion Project Summary Report on Expanded Files

To generate a Summary report, go to Report ðUser Reports > Ingestion/Processing Reports > Ingestion Reports on Expanded Files > Ingestion ProjectSummary on Expanded Files. You will then need to choose whether you want a Project Level, Custodian Level or Media Level report.

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Project Level – Report is generated on the Project Level.

The report header will include the Project Name, Report Generated Date, and Report Created By.

Ingestion Project Summary on Expanded Files (Project Level)

Project Name: Enron Demo Project
Report Generated Date: 11/17/2016 5:23:23 AM
Report Created By: Techwriter

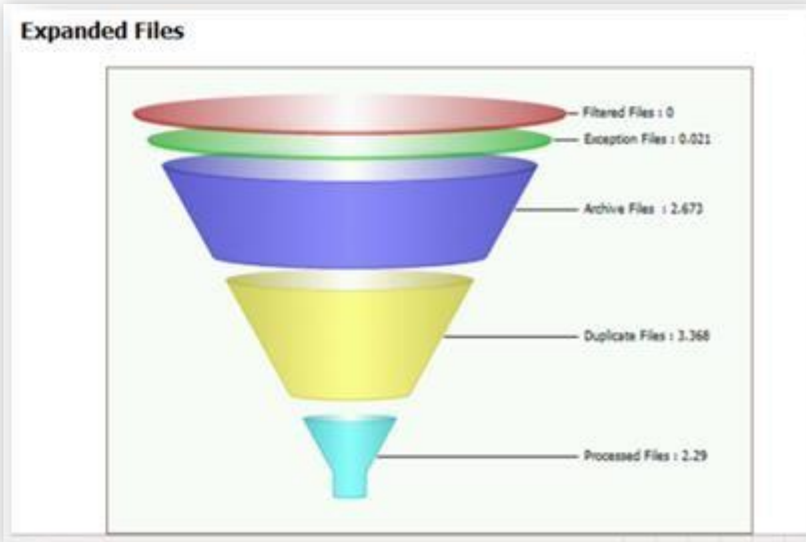
Number of Custodians	4
Number of Media Added in the Project	4
Number of Media completely Ingested	4
Number of Media being Ingested	0
Number of Media not Ingested	0

In the Ingestion Summary report, the following details will be included:

- Total # of Custodians
- Total # of Medias Added to Project
- Number of Media Completely Ingested
- Number of Media Being Ingested
- Number of Media Not Ingested

Ingestion Project Summary on Expanded Files – Detail Diagrams

In a funnel chart, you will see an overview of the Expanded Files:



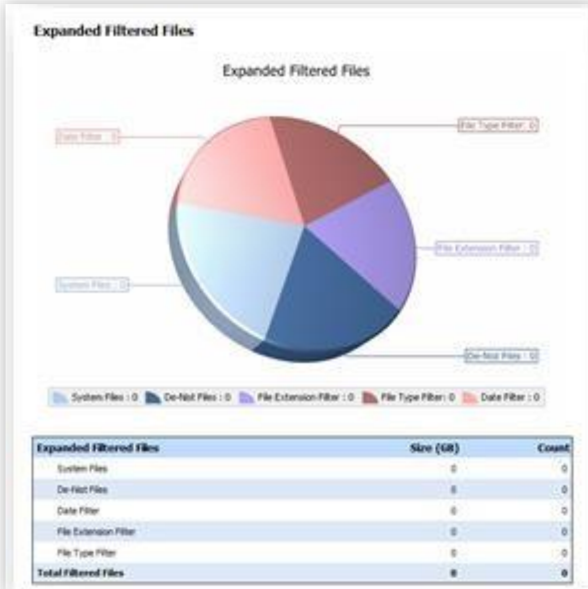
Expanded Files	Size (GB)	Count
Filtered Files	0	0
Exception Files	0.021	92
Archive Files	2.673	9
Processed Files	2.29	11,975
Total Expanded Files (Without Duplicates)	**4.984**	**12,076**
Duplicates of Processed & Exceptions Files	**3.368**	**12,651**
Total Expanded Files (Including Duplicates)	**8.353**	**24,727**

Note: Non-Zero numbers that are smaller than 0.001 are shown as ~0.001 1/8

- Expanded Files (Filtered, Exception, Archive, Processed)
- Total Expanded Files (Without Duplicates)
- Duplicates of Processed & Exception Files
- Total Expanded Files (Including Duplicates)

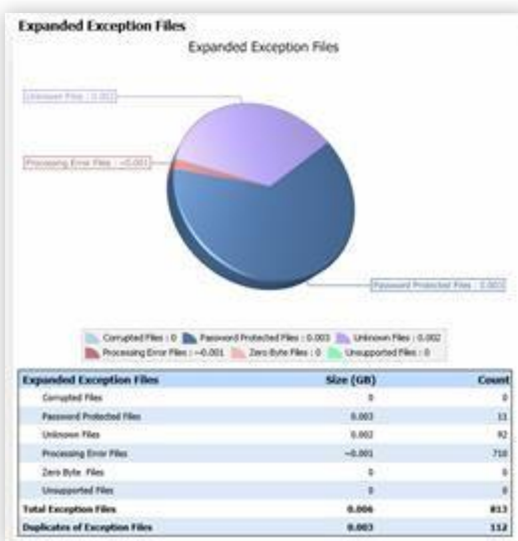
In the pie charts that follow, you will see detailed information about your Expanded Files:

Expanded Filtered Files



- Total # System Files
- Total # De-Nits Files
- Total # Date Filter
- Total # Extension Filter
- Total # File Type Filter
- Total Filtered Files

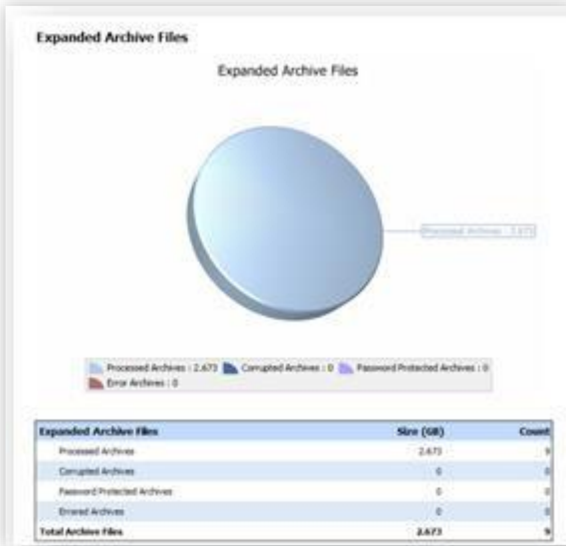
Expanded Exception Files



- Total Corrupted Files

- Total Password Protected Files
- Total Unknown Files
- Total Processing Error Files
- Total Zero Byte Files
- Total Unsupported Files
- Total Exception Files
- Total Duplicate of Exception Files

Expanded Archive Files



- Total Processed Archives
- Total Corrupt Archives
- Total Password Protected Archives
- Total Error Archives
- Total Archived Files

Expanded Duplicates Files

- Total Duplicates of Processed Files
- Total Duplicates of Exception Files
- Total Duplicates Files

Email/Edocs/OCR Files

Email/Edocs/Ocr Files

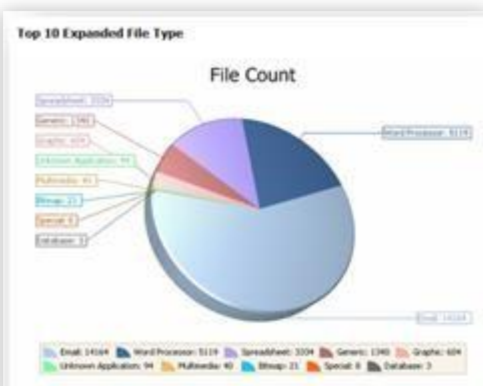
Electronic Mail Documents	Size (GB)	Count
Emails	1.093	7,573
Attachement	1.218	4,494
Total Electronic Mail Document	2.311	12,067
Duplicate of Emails and Attachements	3.368	12,651

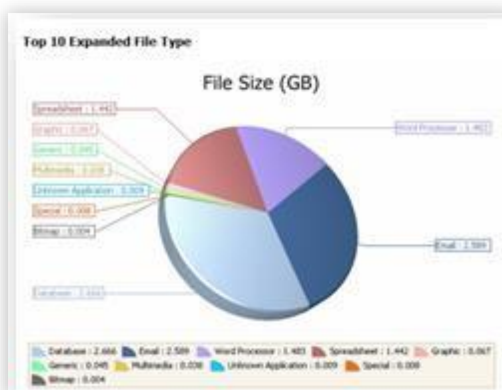
Electronic Documents	Size (GB)	Count
Parent Edocs	0	0
Embedded Edocs	0	0
Total Electronic Documents	0	0
Duplicate of Edocs and Embedded Files	0	0

OCR Documents	Size (GB)	Count
Total OCRable Documents	0.033	258
Duplicate of OCRable Documents	0.042	369

- Electronic Mail Documents (Emails / Attachments)
- Total Electronic Mail Documents
- Duplicate of Emails and Attachments
- Electronic Documents (Parent / Embedded Edocs)
- Total Electronic Documents
- Duplicate of Edocs and Embedded Files
- Total OCRable Documents
- Duplicate of OCRable Documents

Top 10 Expanded File Types





On the last page is the List of Media.

Venio

List of Media(s)

Custodian Name	Media Name	Base Path	Size (GB)	Count
C1	M1a	\\100.100.100.9\Dristi_Development\Venio_QC\Sample for release\Sample for release\2 0byte so 1edoc_1 dedupe	0	2
C1	M1b	\\100.100.100.9\Dristi_Development\Venio_QC\Sample for release\Sample for release\3 Password_Protected_2 duplicate so 3 edoc 2 duplicate	0.001	5
C1	M1c	\\100.100.100.9\Dristi_Development\Venio_QC\Sample for release\Sample for release\5_CAB files so archive =5	0.097	5
C1	M1d	\\100.100.100.9\Dristi_Development\Venio_QC\Sample for release\Sample for release\12 audio clips+5 duplicate so edoc=12 n dup=5	0.002	17

- Custodian Name
- Media Name
- Base Path
- File Size (GB) per Media
- File Count per Media
- Total Size and Count of Files

Custodian Level

Report is generated on a Custodian Level. You will need to select the Custodians you wish to view in your report. Check the desired Custodians and click Generate.

Ingestion Project Summary on Expanded Files (Custodian Level)

Project Name: Enron Demo Project

Report Generated Date: 11/17/2016 5:25:20 AM

Report Created By: Techwriter

Custodian Name	Albert Myers
Number of Media Added in the Custodian	1
Number of Media completely Ingested	1
Number of Media being Ingested	0
Number of Media not Ingested	0

The report header will include the Project Name, Report Generated Date, Report Created By and Custodian Selected.

In the Ingestion Project Summary on Expanded Files (Custodian Level) report, the following details will be included for each Custodian selected:

- Custodian Name
- Number of Media Added to Custodian
- Number of Media Completely Ingested
- Number of Media Being Ingested
- Number of Media Not Ingested

The generated diagrams provide specific information regarding your expanded files. Refer to the Project Level diagrams for reference. If you have more than one custodian, you will need to page through each custodian using the page arrows or by selecting a specific report page at the top.

Media Level

Report is generated on a Media Level. You will need to select the Custodians and the Media you wish to view in your report. Check the desired Medias and click Generate.

The report header will include the Project Name, Report Generated Date, Report Created By and Custodian and Media Selected.
The generated diagrams provide specific information regarding your expanded files. Refer to the Project Level diagrams for reference. If you have more than one media, you will need to page through each media using the page arrows or by selecting a specific report page at the top.

13.4.3.7 Filtered Files Detail Reports

To generate a Filtered Files Detail report, go to Report > User Reports > Ingestion/Processing Reports > Ingestion Reports on Expanded Files > Filtered Files Detail Reports. You will then need to choose whether you want a Summary (Extension Restriction or File Type Restriction), Project Level, Custodian Level or Media Level report.

Select the type of Filter File you want to report on. You can choose from De-Nist Files, System Files, Date Filtered Files, Extension Filtered Files and/or File Type Filtered Files. Click Generate to continue.

NOTE: If there are no filtered files, you will receive a message letting you know. Click OK to continue.

13.4.3.8 Exception Files Detail Reports

To generate an Exception Files Detail report, go to Report > User Reports > Ingestion/Processing Reports > Ingestion Reports on Expanded Files > Exception Files Detail Reports. You will then need to choose whether you want a Summary (Corrupted File Summary or Password Protected File Summary), Project Level, Custodian Level or Media Level report.

Select the type of Exception File you want to report on. You can choose from Corrupted Files, Password Protected Files, Unknown Files and/or Processing Error Files. Click Generate to continue.

13.4.3.9 Archive Files Detail Reports

To generate an Archive Files Detail report, go to Report > User Reports > Ingestion/Processing Reports > Ingestion Reports on Expanded Files > Archive Files Detail Reports. You will then need to choose whether you want a Project Level, Custodian Level or Media Level report.

Select the type of Archive File you want to report on. You can choose from Processed Archive Files, Corrupted Archive Files, Password Protected Archive Files and/or Errored Archive Files. Click Generate to continue.

NOTE: If there are no archive files, you will receive a message letting you know. Click OK to continue.

13.4.3.10 Duplicate Files Detail Reports

To generate a Duplicate Files Detail report, go to Report > User Reports ðIngestion/Processing Reports > Ingestion Reports on Expanded Files > Duplicate Files Detail Reports. You will then need to choose whether you want a Project Level, Custodian Level or Media Level report.

Select the type of Duplicate File you want to report on. You can choose from Processed Duplicate Files and/or Exception Duplicate Files. Click Generate to continue.

NOTE: If there are no archive files, you will receive a message letting you know. Click OK to continue.

13.4.3.11 Email Reports

To generate an Email report, go to Report > User Reports > Ingestion/Processing Reports > Ingestion Reports on Expanded Files > Email Reports. You will then need to choose whether you want a Project Level, Custodian Level or Media Level report.

NOTE: If there are no archive files, you will receive a message letting you know. Click OK to continue.

13.4.3.12 Edocs Reports

To generate anEdocs report, go to Report > User Reports > Ingestion/Processing Reports > Ingestion Reports on Expanded Files > Edocs Reports. You will then need to choose whether you want a Project Level, Custodian Level or Media Level report.

NOTE: If there are no archive files, you will receive a message letting you know. Click OK to continue.

13.4.3.13 File Directory Reports

To generate an Directory Listing report, go to Report > User Reports > Ingestion/Processing Reports > Ingestion Reports on Expanded Files > File Directory Reports. You will then need to choose whether you want a Project Level or Custodian Level.

13.4.3.13.1 Project Level

Report is generated on the Project Level

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Ingestion Project File Directory report, the following details will be included:

- File ID
- File Extension
- File Size
- File Path

13.4.3.13.2 Custodian Level

Report is generated on a Custodian Level. You will need to choose the Custodians you wish to view in your report. Check the desired Custodians and click Generate.

The report header will include the Project Name, Report Generated Date, Report Created By and Custodian Selected.

In the Ingestion Custodian File Directory report, the following details will be included for each Custodian selected:

- File Name
- File Extension
- File Size
- File Path

13.4.4 Analytics Reports

Analytics reports give you information pertaining to various document properties for files that have been imported into the system.

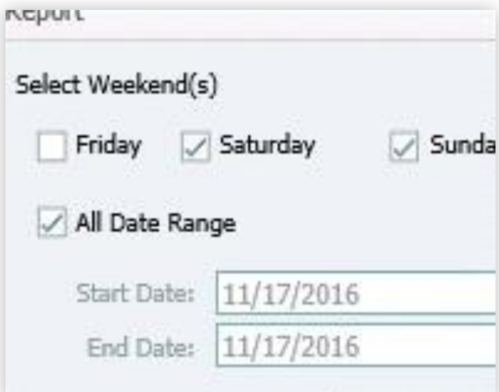
13.4.4.1 Email Time Gap Report

To generate an Email Time Gap report, go to Report > User Reports > Analytics > Email Time Gap Reports. You will then need to select either Archive Level or Custodian Level.

NOTE: This report is only available for Email Archive Files (e.g. PST or NSF).

13.4.4.1.1 Archive Level

After you select Archive Level, a message prompts whether you would like to generate a report using Select Weekends or a Date Range. Check the days that apply or enter the Date Range and click Apply to continue.



The report header will include the Project Name, Report Generated Date, Report Created By, Selected Weekends or Date Range and Custodian.

In the Email Time Gap report, the following details will be included:

- Start Gap Date
- End Gap Date
- Gap Days #

Venio

Email Time Gap (Archive Level)

Project Name: Enron Demo Project
Report Generated Date: 11/17/2016 6:15:59 AM
Report Created By: Techwriter
Selected Weekends: Saturday,Sunday

Albert Myers

\\NFSROOT\zpool1_volume1_share1\VenioTestData\Enron\albert_meyers_000.pst

Start Gap Date	End Gap Date	Gap Days #
04/09/2001	05/02/2001	24
05/04/2001	05/04/2001	1
05/08/2001	05/18/2001	11
05/21/2001	05/21/2001	1
05/24/2001	06/08/2001	16
06/13/2001	06/27/2001	15
06/29/2001	06/29/2001	1

13.4.4.1.2 Custodian Level

Report is generated on a Custodian Level. After you select Custodian Level, a message prompts whether you would like to generate a report using Select Weekends or a Date Range. Check the days that apply or enter the Date Range and click Apply to continue.
You will need to choose the Custodians you wish to view in your report. Check the desired Custodians and click Generate.

The report header will include the Project Name, Report Generated Date, Report Created By and Custodian Selected.

In the Email Time Gap report, the following details will be included for each Custodian selected:

- Start Gap Date
- End Gap Date
- Gap Days #

Venio

Email Time Gap (Custodian Level)

Project Name:	Enron Demo Project
Report Generated Date:	11/17/2016 6:24:25 AM
Report Created By:	Techwriter
Selected Weekends	Saturday,Sunday

Note: This report only applies for email achives (PST,NSF)

Albert Myers

Start Gap Date	End Gap Date	Gap Days #
04/09/2001	05/02/2001	24
05/04/2001	05/04/2001	1
05/08/2001	05/18/2001	11
05/21/2001	05/21/2001	1
05/24/2001	06/08/2001	16
06/13/2001	06/27/2001	15

NOTE: The default date format for Email Time Gap reports is mm/dd/yyyy. It can be changed by setting the date format in the column DATE_FORMAT_FOR_REPORT in tbl_pj_ProjectSetting.

Examples: dd.mm.yyyy, MMMM DD, YYYY, etc.

13.4.4.2 Domain Report

To generate a Domain report, go to Report > User Reports > Analytics > Domain. You will have to then select either Project Level or Custodian Level.

13.4.4.2.1 Project Level

Report is generated on the Project Level
The report header will include the Project Name, Report Generated Date and Report Created By.

In the Domain Project Summary report, the following details will be included:

- Domain Name · Count

Venio

Domain Project Summary

Project Name:	Enron Demo Project
Report Generated Date:	11/17/2016 6:27:01 AM
Report Created By:	Techwriter

Domain Name	Count
ACCENTURE.COM	32
ACCENTURE.COM@ENRON	3
AIMFUNDS.COM	3
AIRMAIL.NET	4
AMEREXENERGY.COM	3
ANDERSEN.COM	1
ANGELFLIGHTSC.ORG	14
AOL.COM	18
APBENERGY.COM	2

13.4.4.2.2 Custodian Level

Report is generated on a Custodian Level. You will need to choose the Custodians you wish to view in your report. Check the desired Custodians and click Generate.

The report header will include the Project Name, Report Generated Date, Report Created By and Custodian Selected.

In the Domain Custodian Summary report, the following details will be included for each Custodian selected:

- Domain Name
- Count

Venio

Domain Custodian Summary

Project Name :	Enron Demo Project
Report Generated Date:	11/17/2016 6:27:49 AM
Report Created By:	Techwriter

Albert Myers

Domain Name	Count
APCI.COM	1
EARTHLINK.NET	1
ENRON	115
ENRON.COM	1,052
EPELECTRIC.COM	2
HOTMAIL.COM	4
KPTV.COM	2
UBSPAINEWEBBER.COM	3
UBSPW.COM	6
UBSW.COM	2
UNKNOWN	135
WATSONWYATT.COM	1

13.4.4.3 Language Report

To generate a Language report, go to Report > User Reports > Analytics > Language. You will then have to select Project Level, Custodian Level or Details Report.

13.4.4.3.1 Project Level

Report is generated on the Project Level

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Language report, the following details will be included:

- Language
- Total Count

Language Report Project Level

Project Name:	Enron Demo Project
Report Generated Date:	11/17/2016 6:36:59 AM
Report Created By:	Techwriter

Language	Total Count
ENGLISH	8,067
NOT_ENOUGH_TEXT	1,372
NO_TEXT	1,278
ROMANIAN	594
FRENCH	36
SPANISH	24
GERMAN	19
CZECH	14
JAPANESE	4
DANISH	3
DUTCH	1
NORWEGIAN	1

13.4.4.3.2 Custodian Level

Report is generated on a Custodian Level. You will need to choose the Custodians you wish to view in your report. Check the desired Custodians and click Generate.

The report header will include the Project Name, Report Generated Date, Report Created By and Custodian Selected.

In the Language report, the following details will be included for each Custodian selected:

- Language
- Total Count

Language Report Custodian Level

Project Name:	Enron Demo Project
Report Generated Date:	11/17/2016 6:36:16 AM
Report Created By:	Techwriter

Chris Stokley

Language	Total Count
SPANISH	3
DANISH	3
FRENCH	10
GERMAN	11
NOT_ENOUGH_TEXT	13
NO_TEXT	113
ROMANIAN	525
ENGLISH	2,021

13.4.4.3.3 Detail Report

This generates the detailed report of the language of the emails in the project.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Language report, the following details will be included for each Custodian selected:

- File ID
- File Name
- File Path
- Language
- Language Details

Venio

Language Details Report

Project Name: Enron Demo Project

Report Generated Date: 11/17/2016 6:34:36 AM

Report Generated By: Techwriter

File ID	File Name	File Path	Language	Language Details
2	FW: FW: Laid-Off A No Nothing Production.msg	\\NFSROOT\zpool1_volume1_share1\VenioTestData\Enron\albert_meyers_000.pst\albert_meyers_000\meyers-a\ExMerge - Meyers, Albert\Sent Items\FW: FW: Laid-Off A No Nothing Production.msg	ENGLISH	ENGLISH
3	EPE Schedules for the past two days.msg	\\NFSROOT\zpool1_volume1_share1\VenioTestData\Enron\albert_meyers_000.pst\albert_meyers_000\meyers-a\ExMerge - Meyers, Albert\Sent Items\EPE Schedules for the past two days.msg	ENGLISH	ENGLISH
4	How are you doing (plus a little about me)?.msg	\\NFSROOT\zpool1_volume1_share1\VenioTestData\Enron\albert_meyers_000.pst\albert_meyers_000\meyers-a\ExMerge - Meyers, Albert\Sent Items\How are you doing (plus a little about me)?.msg	ENGLISH	ENGLISH
5	ADS Machine.msg	\\NFSROOT\zpool1_volume1_share1\VenioTestData\Enron\albert_meyers_000.pst\albert_meyers_000\meyers-a\ExMerge - Meyers, Albert\Sent Items\ADS Machine.msg	ENGLISH	ENGLISH

13.4.4.4 Email Summary Report

To generate an Email Summary report, go to Report > User Reports > Analytics > Email Summary. You will then have to select Project Level or Custodian Level.

13.4.4.4.1 Project Level

Report is generated on the Project Level.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Email Summary report, the following details will be included:

- Total # of Custodians
- Total # of Medias
- Total # of Files
- Total File Sizes (Expanded)
- Total Unique Files
- Total Files Date Restricted
- Total Files Excluded by Extension
- Total Files Excluded by File Type
- Total Nist Files
- Total System Files
- Total Archive Files
- Total Non-Process Files
- Total Corrupted Files
- Total Password Protected files

- Total Duplicates

In the Email Date Range report, you will see the Custodian Name and the Date Range in which the emails were sent/received (upper and lower limit).

In the Pie Charts, the following details will be displayed:

- Email Address: Shows the names from which the Emails were sent or received, with counts.
- Email and Attachment: Shows the count of files that are Emails and Attachments.
- Email Domain: Shows the count of the email domains, the names of domain and their counts.
- Email Timeline: Shows the year and the email count sent/received in that year.
- Email Senders: Shows the Email Senders with their counts.
- Email Recipients: Shows the Email Recipients with their counts.

Ingestion Project Email Summary

Project Name: Enron Demo Project

Report Generated Date: 11/17/2016 6:40:09 AM

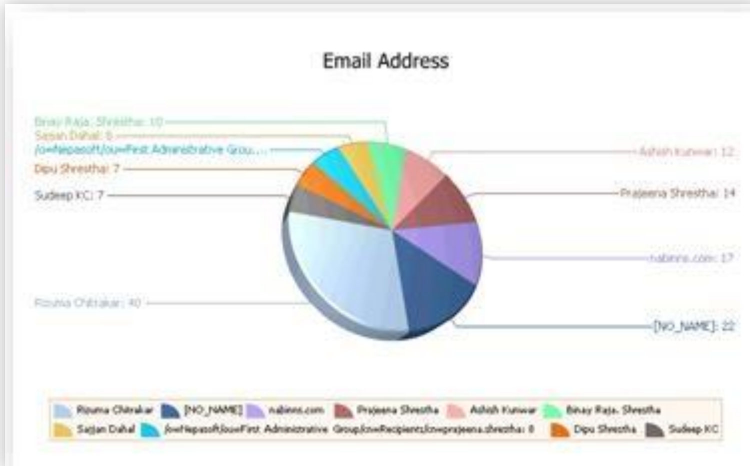
Report Created By: Techwriter

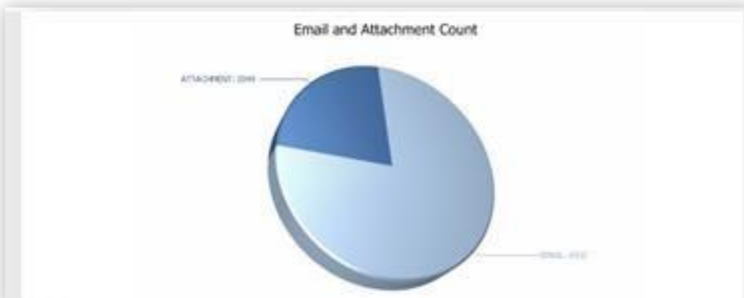
Total # of Custodian	4
Total # of Medias	4
Total File Sizes (Expanded)	1.28 GB
Total # of Files	17,264
Total # Unique Files	11,413

Total # Files Date Restricted	0
Total # Files Excluded By Extension	0
Total # Files Excluded By File Type	0
Total # Non Processable Files	152
Total # Corrupted Files	0
Total # Password Protected Files	0
Total # Duplicates	5,851

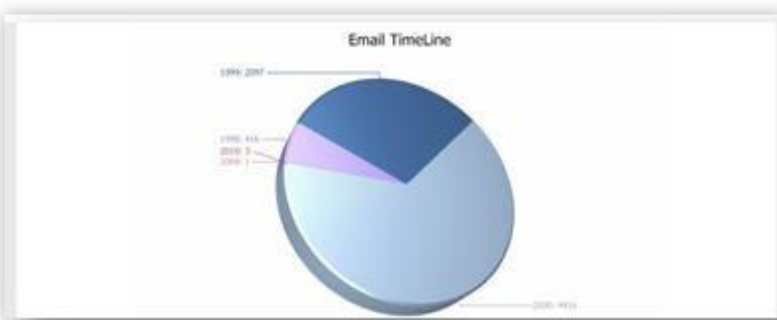
Email Date Range

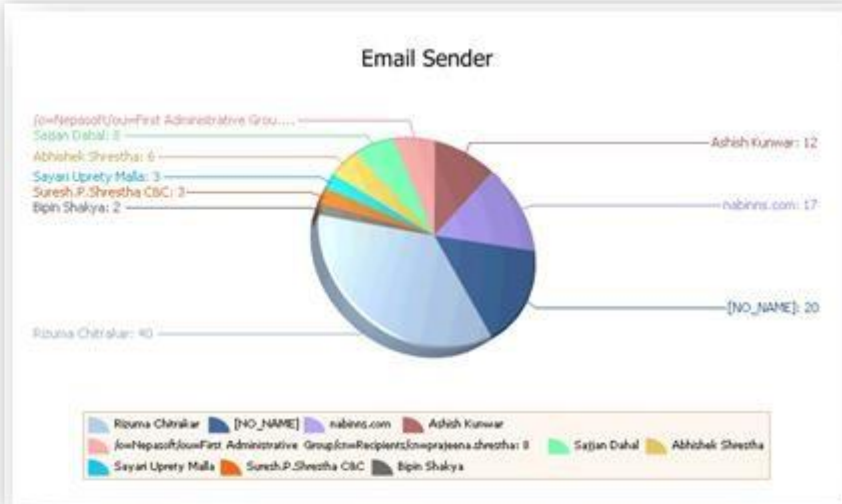
Custodian	Date
Albert Myers	4/6/2001 8:02:00 AM - 2/7/2002 8:09:37 AM
Andy Zipper	1/1/1980 8:00:00 AM - 11/30/2002 8:00:00 AM
Brad Mckay	1/1/1980 8:00:00 AM - 1/1/2002 1:26:32 AM
Chris Stokley	3/31/2001 6:22:00 AM - 10/25/2001 9:33:02 PM


Email Address
Sudeep KC: 7
Dipu Shrestha: 7
Prajeena Shrestha: 14
[NO_NAME]: 22
Rizuma Chitrakar
[NO_NAME]
nabinns.com
Prajeena Shrestha
Ashish Kunwar
Binay Raja. Shrestha
Sajjan Dahal
Dipu Shrestha
Sudeep KC


Email and Attachment Count


Email Domain


Email TimeLine



13.4.4.4.2 Custodian Level

Report is generated on a Custodian Level. You will need to choose the Custodians you wish to view in your report. Check the desired Custodians and click Generate.

The report header will include the Project Name, Report Generated Date, Report Created By and Custodian Selected.

In the Email Summary report, the following details will be included for each Custodian selected:

- Total # of Custodians
- Total # of Medias
- Total File Sizes (Expanded)
- Total # of Files

- Total Unique Files
- Total Files Date Restricted
- Total Files Excluded by Extension
- Total Files Excluded by File Type
- Total Nist Files
- Total System Files
- Total Archive Files
- Total Non-Process Files
- Total Corrupted Files
- Total Password Protected files
- Total Duplicates

In the Email Date Range report, you will see the Custodian Name and the Date Range in which the emails were sent/received (upper and lower limit).

In the Pie Charts, the following details will be displayed:

- Email Address: Shows the names from which the Emails were sent or received, with counts.
- Email and Attachment: Shows the count of files that are Emails and Attachments.
- Email Domain: Shows the count of the email domains, the names of domain and their counts.
- Email Timeline: Shows the year and the email counts sent/received in that year.
- Email Senders: Shows the Email Senders with their counts.
- Email Recipients: Shows the Email Recipients with their counts.

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Ingestion Project Email Summary

Project Name:	Enron Demo Project
Report Generated Date:	11/17/2016 9:25:16 AM
Report Created By:	Techwriter

Total # of Custodian	4
Total # of Medias	4
Total File Sizes (Expanded)	1.28 GB
Total # of Files	17,264
Total # Unique Files	11,413

Total # Files Date Restricted	0
Total # Files Excluded By Extension	0
Total # Files Excluded By File Type	0
Total # Non Processable Files	152
Total # Corrupted Files	0
Total # Password Protected Files	0
Total # Duplicates	5,851

Email Date Range

Custodian	Date
Albert Myers	4/6/2001 8:02:00 AM - 2/7/2002 8:09:37 AM
Andy Zipper	1/1/1980 8:00:00 AM - 11/30/2002 8:00:00 AM
Brad Mckay	1/1/1980 8:00:00 AM - 1/1/2002 1:26:32 AM
Chris Stokley	3/31/2001 6:22:00 AM - 10/25/2001 9:33:02 PM

NOTE: For examples of the Pie Charts, please refer to the Project Level diagrams.

13.4.4.5 Electronic File Summary Report

To generate an Electronic File Summary report, go to Report <<User Reports <<Analytics <<Electronic File Summary. You will then have to select Project Level or Custodian Level.

13.4.4.5.1 Project Level

Report is generated on the Project Level.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Electronic File Summary report, the following details will be included:

- Total # of Custodians
- Total # of Medias
- Total File Sizes (Expanded)
- Total # of Files
- Total Unique Files
- Total Files Date Restricted
- Total Files Excluded by Extension
- Total Files Excluded by File Type
- Total Nist Files
- Total System Files
- Total Archive Files
- Total Non-Process Files
- Total Corrupted Files
- Total Password Protected files
- Total Duplicates

In the Edoc Last Modified Date Range report, you will see the Custodian Name and the Date Range in which the documents were modified (upper and lower limit).

In the Pie Charts that follow, you will see the following information:

Top 10 File Types

- File Counts: Shows the count of the Top 10 file types in the media
- File Size: Shows the total file sizes for the Top 10 file types

Top 10 File Sizes

- File Counts: Shows the count of the Top 10 files with the largest file sizes
- File Size: Shows the total file sizes for the Top 10 files with maximum size

Ingestion Electronic File Project Summary

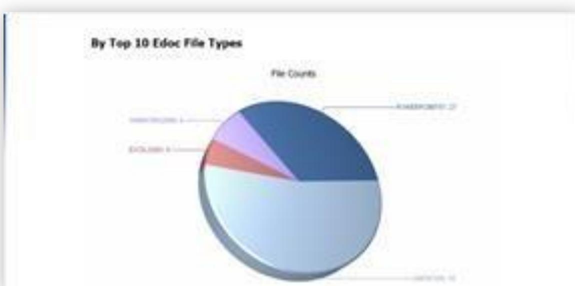
Project Name: aarjya_webreport_21stJune
Report Generated Date: 6/24/2011 11:31:30 AM
Report Created By: aarjya

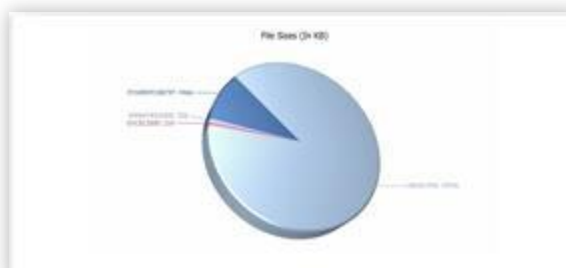
Total # of Custodian	9
Total # of Medias	11
Total File Sizes (Expanded)	273.05 MB
Total # of Files	414
Total # Unique Files	292

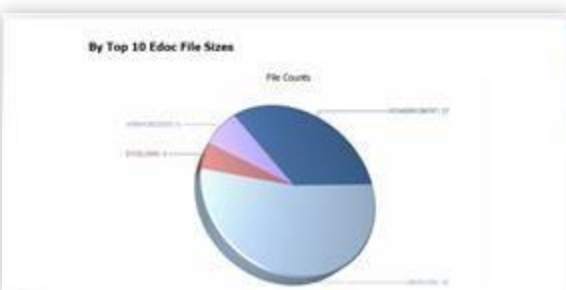
Total # Files Date Restricted	0
Total # Files Excluded By Extension	24
Total # Files Excluded By File Type	12
Total # Nist Files	0
Total # System Files	35
Total # Archive Files	12
Total # Non Processable Files	32
Total # Corrupted Files	0
Total # Password Protected Files	7
Total # Duplicates	122

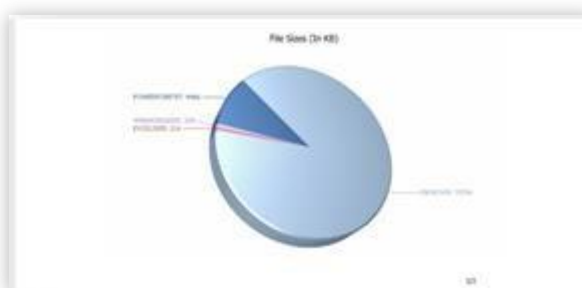
Edoc Last Modified Date Range

Custodian	Last Modified Date
C1	3/4/2002 6:09:28 AM - 11/5/2008 9:09:36 AM
C2	3/8/1998 6:15:00 PM - 10/2/2009 11:45:24 AM
C3	5/24/2010 5:12:46 AM - 5/24/2010 5:16:13 AM
C4	9/17/2009 11:45:10 AM - 6/21/2010 6:31:00 AM
c7	10/26/2008 8:09:37 AM - 10/2/2009 11:45:24 AM
C8	12/14/2008 5:32:29 AM - 12/14/2008 5:46:16 AM
C9	5/24/2010 6:00:09 AM - 5/24/2010 6:00:09 AM
C14	6/30/2010 6:15:43 AM - 6/30/2010 6:15:43 AM
C15	9/16/2006 12:00:00 AM - 3/31/2011 4:50:03 AM









13.4.4.5.2 Custodian Level

Report is generated on a Custodian Level. You will need to choose the Custodians you wish to view in your report. Check the desired Custodians and click Generate.

The report header will include the Project Name, Report Generated Date, Report Created By and Custodian Selected.

In the Electronic File Summary report, the following details will be included for each Custodian selected:

- Total # of Custodians
- Total # of Medias
- Total # of Files
- Total Unique Files
- Total Files Date Restricted
- Total Files Excluded By Extension
- Total Files Excluded by File Type
- Total Nist Files
- Total System Files
- Total Archive Files
- Total Non-Process Files
- Total Corrupted Files
- Total Password Protected files
- Total Duplicates

In the Edoc Last Modified Date Range report, you will see the Custodian Name and the Date Range in which the documents were modified (upper and lower limit).

In the Pie Charts that follow, you will see the following information, per custodian:

Top 10 File Types

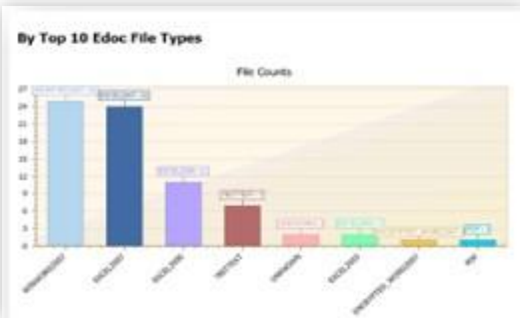
- File Counts: Shows the count of the Top 10 file types in the media
- File Size: Shows the total file sizes for the Top 10 file types

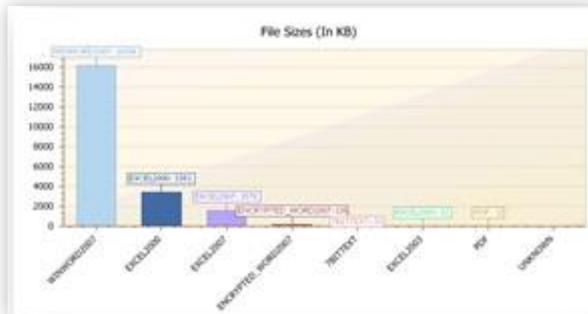
Top 10 File Sizes

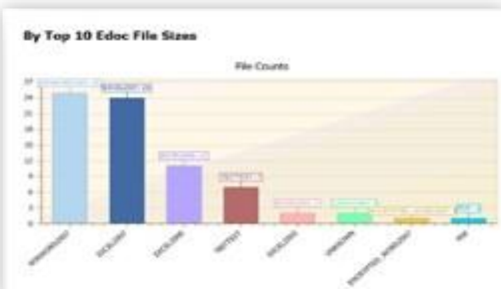
- File Counts: Shows the count of the Top 10 files with the largest file sizes
- File Size: Shows the total file sizes for the Top 10 files with maximum size

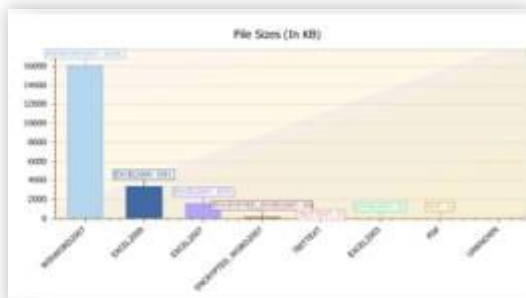
Edoc Last Modify Date Range

Media	Last Modified Date
M1d	3/4/2002 6:09:28 AM - 11/5/2008 9:09:36 AM









13.4.4.6 File Type Summary Report

To generate a File Type Summary report, go to Report ðUser Reports > Analytics > File Type Summary. You will then have to select Project Level or Custodian Level.

13.4.4.6.1 Project Level

Report is generated on the Project Level.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the File Type Summary report, the following details will be included:

- File Type
- File Type Description
- File Extension

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- Original File Counts
- Duplicate File Counts
- Total File Counts
- Original File Sizes
- Duplicate File Sizes
- Total File Sizes

Ingestion Project File Type Summaries

Project Name: Enron Demo Project

Report Generated Date: 11/17/2016 10:00:36 AM

Report Created By: Techwriter

File Type	Original File Count	Duplicate File Count	Total File Count	Original File Size	Duplicate File Size	Total File Size
Archive	14	2	16	12.18 MB	3.09 MB	15.27 MB
Bitmap	3	0	3	707.06 KB	0 Bytes	707.06 KB
Email	6,893	4,151	11,044	536.82 MB	169.1 MB	705.92 MB
Email Archive	4	0	4	587.86 MB	0 Bytes	587.86 MB
Graphic	20	10	30	510.39 KB	415 KB	925.39 KB
HTML	7	1	8	133.16 KB	13.12 KB	146.27 KB
JPG	66	5	71	9.52 MB	259.18 KB	9.77 MB

13.4.4.6.2 Custodian Level

Report is generated on a Custodian Level. You will need to choose the Custodians you wish to view in your report. Check the desired Custodians and click Generate.

The report header will include the Project Name, Report Generated Date, Report Created By and Custodian Selected.

In the File Type Summary report, the following details will be included for each Custodian selected:

- File Type
- File Type Description
- File Extension
- Original File Counts
- Duplicate File Counts
- Total File Counts
- Original File Sizes
- Duplicate File Sizes
- Total File Sizes

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Ingestion Custodian File Type Summaries

Project Name:	Enron Demo Project
Report Generated Date:	11/17/2016 9:23:00 AM
Report Created By:	Techwriter

Albert Myers

File Type	Original File Count	Duplicate File Count	Total File Count	Original File Size	Duplicate File Size	Total File Size
Email	1,168	0	1,168	30.54 MB	0 Bytes	30.54 MB
Email Archive	1	0	1	12.37 MB	0 Bytes	12.37 MB
Microsoft Excel	3	0	3	1.84 MB	0 Bytes	1.84 MB
Microsoft Powerpoint	2	0	2	266.5 KB	0 Bytes	266.5 KB
Microsoft Word	6	0	6	135.5 KB	0 Bytes	135.5 KB
PDF	14	0	14	683.26 KB	0 Bytes	683.26 KB

13.4.5 Sampling Report

The Sampling report gives you information pertaining to a Sample you've created.

To generate a Sampling report, go to Report > User Reports > Sampling. You will then need to select the Sample Set you want to generate the report for.

NOTE: Sampling reports can only be generated after you've created and saved a Sample Set.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Sampling report, the following details will be included:

- Sample Name
- Population Name
- Population Size
- Confidence Level
- Confidence Interval
- Sample Percentage
- # of Document Sampled
- Sampling Purpose
- Sampling Results
- Before Sampling
- After Sampling

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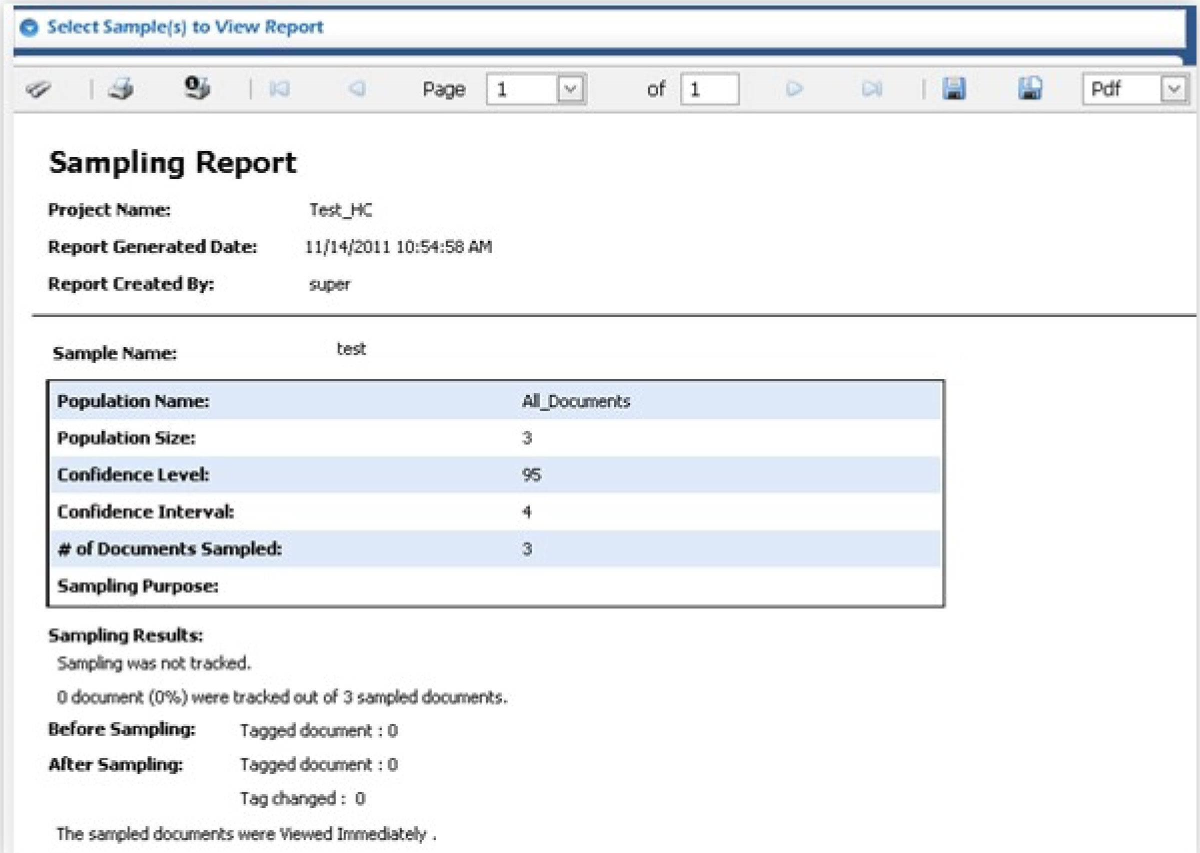


Select Sample(s) to View Report

Page 1 of 1 Pdf

Sampling Report

Project Name:	Test_HC
Report Generated Date:	11/14/2011 10:54:58 AM
Report Created By:	super

Sample Name: test

Population Name:	All_Documents
Population Size:	3
Confidence Level:	95
Confidence Interval:	4
# of Documents Sampled:	3
Sampling Purpose:	

Sampling Results:

Sampling was not tracked.

0 document (0%) were tracked out of 3 sampled documents.

Before Sampling: Tagged document : 0

After Sampling: Tagged document : 0

Tag changed : 0

The sampled documents were Viewed Immediately .

13.4.6 Search Term Audit Report

The Search Term Audit report gives you information pertaining to searches you have executed in the system.

NOTE: Search Reports can only be viewed after you have performed searches.

To generate a Search Term Audit report, go to Report > User Reports > Search > Search Term Audit.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Search Term Audit report, the following details will be included:

- Search ID: System generated identifier.
- Search Name: Lists the saved Search Names, if available.
- Search Expression: Lists the search expressions used in the search.

- Is Load File Search: This has the value 'YES' or 'NO'. If any search was conducted using a load file, 'Yes'. Otherwise, it displays 'No'.
- Searched Date: Displays the date / time when the search was performed.
- Total Hit #: Displays the total number of search result returned for each search performed.
- Searched By: Username that conducted the search.
- Duplicate Search Option: Option chosen at time of search to Show/Hide Duplicates.

Search Term Audit

Project Name: Enron Demo Project
Report Generated Date: 11/17/2016 10:07:01 AM
Report Created By: Techwriter

Search ID	Search Name	Search Expression	Is Load File Search	Searched Date	Total Hit #	Searched By	Include Family of Search Hits	Duplicate Search Option
1		fileid>0	No	6/10/2015 2:44:37 AM	11413	super	No	Show only one instance in the selected scope (DynamicDeDupe™)
2		test	No	11/9/2016 1:45:46 PM	181	Techwriter	No	Show only one instance in the selected scope (DynamicDeDupe™)
3		fileid > 0	No	11/9/2016 1:59:23 PM	11413	Techwriter	No	Show only one instance in the selected scope (DynamicDeDupe™)
4		fileid > 0	No	11/9/2016 2:52:40 PM	11413	Techwriter	No	Show only one instance in the selected scope (DynamicDeDupe™)
5		fileid > 0	No	11/14/2016 1:55:47 PM	11413	Techwriter	No	Show only one instance in the selected scope (DynamicDeDupe™)

13.4.7 Tag Reports

The Tag reports give you information pertaining to the tags applied during your search or review.

To generate a Tag report, go to Report > User Reports > Tag.

13.4.7.1 Tag Summary Report

To generate a Tag Summary report, go to Report > User Reports > Tag > Tag Summary. You will then have to select the specific report you wish to view.

13.4.7.1.1 Tag Report (No De-Dupe)

All tagged documents will be listed.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Tag Report (No De-Dupe), the following details will be included:

- Tag Name
- Total Count

- Total File Size

Tag Report (No Dedupe)

Project Name: Enron Demo Project
Report Generated Date: 11/17/2016 10:09:36 AM
Report Created By: Techwriter

Tag Name	Total Count	Total File Size
Responsive	1	15.5 KB

13.4.7.1.2 Tag Report (Project Level De-Dupe)

Tagged documents will be de-duped globally and only appear once in the project.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Tag Report (Project Level De-Dupe), the following details will be included:

- Tag Name
- Total Count
- Total File Size

Tag Report (Project Level Dedupe)

Project Name: Enron Demo Project
Report Generated Date: 11/17/2016 10:10:16 AM
Report Created By: Techwriter

Tag Name	Total Count	Total File Size
Responsive	1	15.5 KB

13.4.7.1.3 Tag Report (Custodian Level De-Dupe)

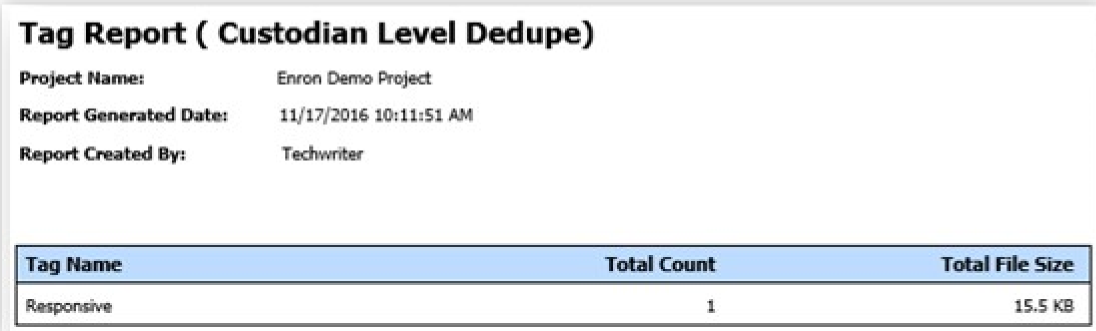
Tagged documents will be de-duped within each Custodian and can appear more than once in the project.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Tag Report (Custodian Level De-Dupe), the following details will be included:

- Tag Name

- Total Count
- Total File Size


Tag Report (Custodian Level Dedupe)

Project Name: Enron Demo Project
Report Generated Date: 11/17/2016 10:11:51 AM
Report Created By: Techwriter

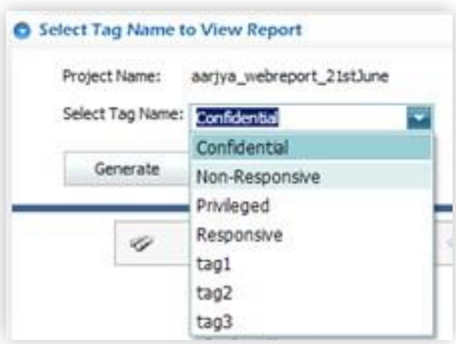
Tag Name	Total Count	Total File Size
Responsive	1	15.5 KB

13.4.7.1.4 Tag Report Summary

Information will be listed for the selected Tag.

When you select Tag Report Summary, a dialog will prompt you to Select Tag Name to View. Use the drop-down list to select a Tag and click Generate to continue.

The report header will include the Project Name, Report Generated Date, Selected Tag Name and Report Created By.



In the Tag Report Summary, the following details will be included:

- Total # of Custodians
- Total # of Medias
- Total File Sizes (Expanded)
- Total # of Files
- Total Unique Files
- Total # No-Text Files
- Total # Supported Files
- Total # Corrupted Files

- Total # Password Protected Files
- Total # Unsupported Files
- Total # Duplicates
- Total # Email
- Total # Attachments Files
- Total # Electronics Files
- Total # Non-Process Files

Tag Summary

Project Name : aarjya_webreport_21stJune
Report Generated Date : 6/24/2011 4:28:31 PM
Selected Tag Name : tag1
Report Created By: aarjya

Total # of Custodian	1
Total # of Medias	1
Total File Sizes (Expanded)	57.89 KB
Total # of Files	2
Total # Unique Files	1

Total # No-Text Files	1
Total # Supported Files	1
Total # Corrupted Files	0
Total # Password Protected Files	0
Total # Unsupported Files	0
Total # Duplicates	1

Total # Emails	0
Total # Attachment Files	0
Total # Electronic Files	2
Total # Non Process Files	0

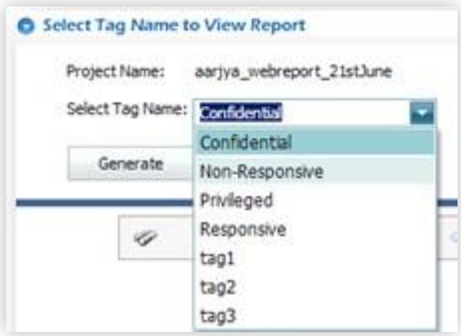
13.4.7.1.5 Tag Report Email Summary

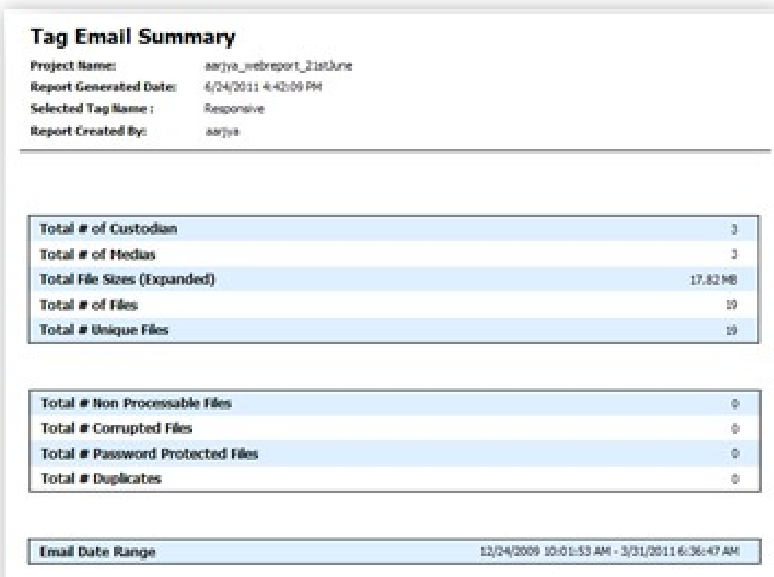
When you select Tag Report Email Summary, a window will prompt you to Select Tag Name to View. Use the drop-down list to select a Tag and click Generate to continue. The report header will include the Project Name, Report Generated Date, Selected Tag Name and Report Created By.

In the Tag Report Email Summary, the following details will be included:

- Total # of Custodians
- Total # of Medias
- Total # of Files Total File Sizes (Expanded)
- Total Unique Files

- Total # Non-Processable Files
- Total # Corrupted Files
- Total # Password Protected Files
- Total # Duplicates
- Email Date Range





13.4.7.2 Tag History Report

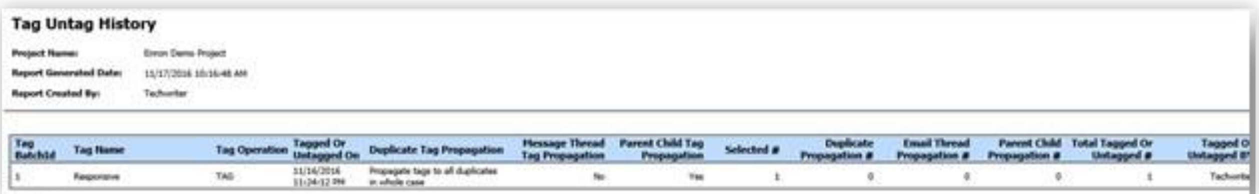
To generate a Tag History report, go to Report > User Reports > Tag > Tag History.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Tag History report, the following details will be included:

- Tag Batch ID: System generated identifier.
- Tag Name: Name of Tag.

- Is Tag Operation: Verifies operation was a tag and not a foldering action.
- Tagged Or Untagged On: Date and Time the tag was applied.
- Duplicate Tag Propagation: Tag propagation used in each of the tag applied
- Message Thread Tag Propagation: Tag propagation on the email/attachment in each tag applied.
- Parent Child Propagation: Tag propagation in the parent/child thread. · Selected #: Number of document in which the tags have been applied.
- Duplicate Propagation #: Total duplicate documents tagged.
- Email Thread Propagation # : Total email/attachment tagged.
- Parent Child Propagation #: Total parent documents tagged.
- Total Tagged Or Untagged Count: Total documents tagged or untagged.
- Tagged or Untagged By: User who has applied/removed the tags.



Tag Untag History

Project Name: Enron Demo Project
Report Generated Date: 11/17/2016 10:16:48 AM
Report Created By: Techwriter

Tag BatchId	Tag Name	Tag Operation	Tagged Or Untagged On	Duplicate Tag Propagation	Message Thread Tag Propagation	Parent Child Tag Propagation	Selected #	Duplicate Propagation #	Email Thread Propagation #	Parent Child Propagation #	Total Tagged Or Untagged #	Tagged Or Untagged By
1	Responsive	TAG	11/16/2016 11:24:12 PM	Propagate tags to all duplicates in whole case	No	Yes	1	0	0	0	1	Techwrite

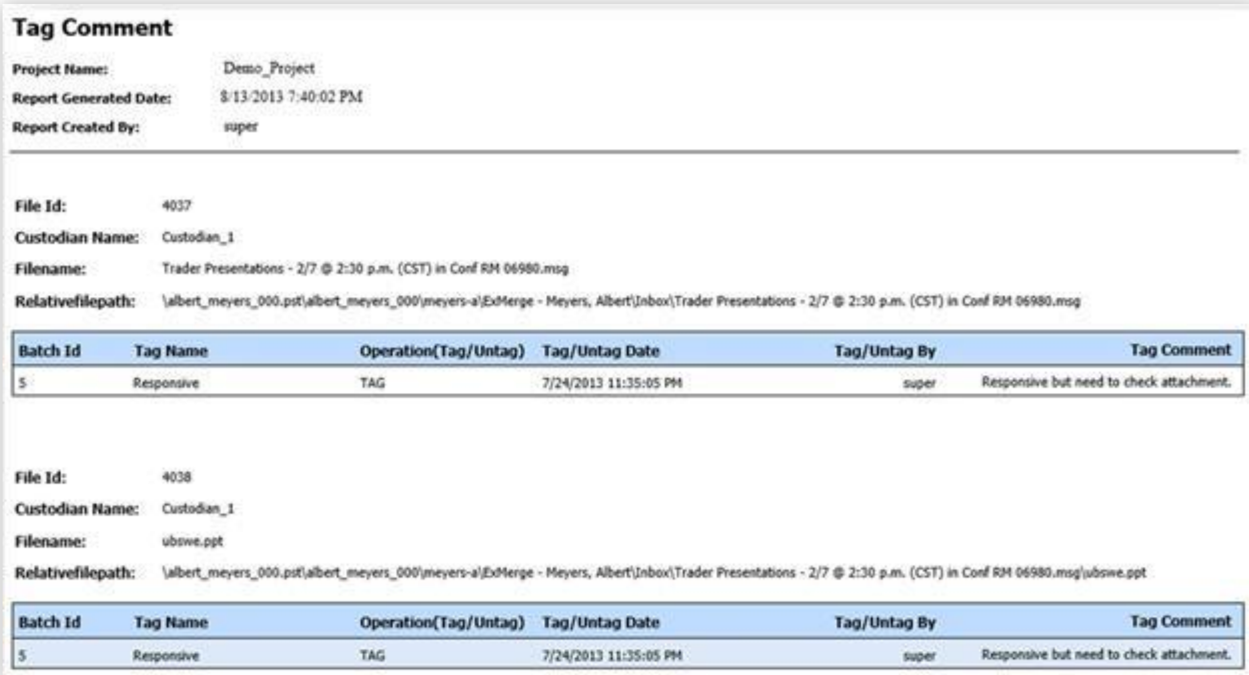
13.4.7.3 Tag Comment Report

To generate a Tag Comment report, go to Report > User Reports > Tag > Tag Comment.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Tag Comment report, the following details will be included:

- Batch ID: System generated identifier.
- Tag Name: Name of Tag.
- Operation (Tag/Untag): Indicates whether the tag was applied or removed.
- Tag/Untag Date: Date and Time the tag operation was applied.
- Tag/Untag By: Shows user that performed the tag operation.
- Tag Comment: Comment made during tagging operation.



Tag Comment

Project Name: Demo_Project
Report Generated Date: 8/13/2013 7:40:02 PM
Report Created By: super

File Id: 4037
Custodian Name: Custodian_1
Filename: Trader Presentations - 2/7 @ 2:30 p.m. (CST) in Conf RM 06980.msg
Relativefilepath: \albert_meyers_000.pst\albert_meyers_000\meyers-a\ExMerge - Meyers, Albert\Inbox\Trader Presentations - 2/7 @ 2:30 p.m. (CST) in Conf RM 06980.msg

Batch Id	Tag Name	Operation(Tag/Untag)	Tag/Untag Date	Tag/Untag By	Tag Comment
5	Responsive	TAG	7/24/2013 11:35:05 PM	super	Responsive but need to check attachment.

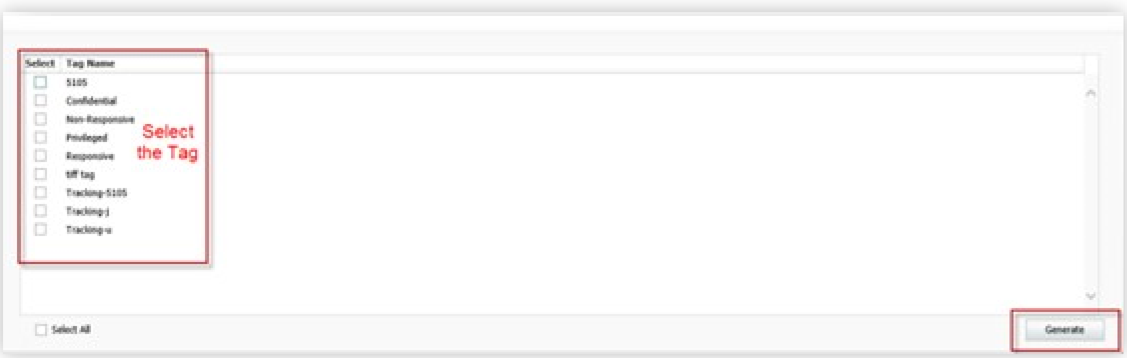
File Id: 4038
Custodian Name: Custodian_1
Filename: ubswe.ppt
Relativefilepath: \albert_meyers_000.pst\albert_meyers_000\meyers-a\ExMerge - Meyers, Albert\Inbox\Trader Presentations - 2/7 @ 2:30 p.m. (CST) in Conf RM 06980.msg\ubswe.ppt

Batch Id	Tag Name	Operation(Tag/Untag)	Tag/Untag Date	Tag/Untag By	Tag Comment
5	Responsive	TAG	7/24/2013 11:35:05 PM	super	Responsive but need to check attachment.

13.4.7.4 Tag Conflict Qc Report

To generate a Tag Conflict Qc report, go to Report > User Reports > Tag > Tag Conflict.

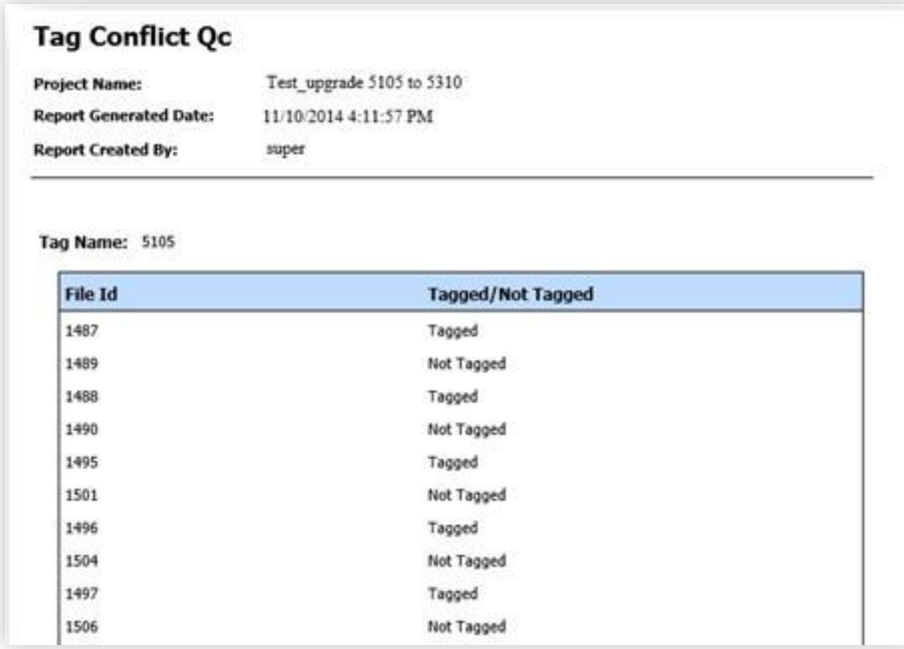
Select the tag for which the report is to be generated.



The report header will include the Project Name, Report Generated Date and Report Created By.

In the Tag Conflict report, the following details will be included:

- Tag Name: The name of the tag for which the report has been generated • FileID: File ID of the document for which these tag conflicts occur
- Tagged/Not Tagged: Whether the tag has been applied or not.



Tag Conflict Qc

Project Name: Test_upgrade 5105 to 5310
Report Generated Date: 11/10/2014 4:11:57 PM
Report Created By: super

Tag Name: 5105

File Id	Tagged/Not Tagged
1487	Tagged
1489	Not Tagged
1488	Tagged
1490	Not Tagged
1495	Tagged
1501	Not Tagged
1496	Tagged
1504	Not Tagged
1497	Tagged
1506	Not Tagged

13.4.8 Detail Document Notes Report

To generate a Detail Document Notes report, go to Report > User Reports > Detail Document Notes. You will then have to select Project Level or Custodian Level.

13.4.8.1 Project Level

Report is generated on the Project Level.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Detail Document Note report, the following details will be included:

- FileID: Assigned File ID for the document containing a note.
- Relative File Path: Complete path to the location of the file containing a note.
- Note Added By: User that applied the document note.
- Notes Added On: Date and time document note was applied.
- Accessibility: Permissions for who can view the document note.
- Document Note: Contents of the document note.

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Detail Document Notes Report (Project Level)

Project Name: Demo_Project
Report Generated Date: 8/13/2013 7:54:15 PM
Report Created By: super

File Id	Relative File Path	Noted Added By	Notes Added On	Accessibility	Document Note
4037	\albert_meyers_000.pst\albert_meyers_000\meyers-a\ExMerge - Meyers, Albert\Inbox\Trader Presentations - 2/7 @ 2:30 p.m. (CST) in Conf RM 06980.msg	super	7/24/2013 11:37:59 PM	Public	Test document notes.

13.4.8.2 Custodian Level

Report is generated on a Custodian Level. You will need to choose the Custodians you wish to view in your report. Check the desired Custodians and click Generate.

The report header will include the Project Name, Report Generated Date, Report Created By and Custodian Selected.

In the Detail Document Notes report, the following details will be included for each Custodian selected:

- FileID: Assigned File ID for the document containing a note.
- Relative File Path: Complete path to the location of the file containing a note.
- Note Added By: User that applied the document note.
- Notes Added On: Date and time document note was applied.
- Accessibility: Permissions for who can view the document note.
- Document Note: Contents of the document note.

Detail Document Notes Report (Custodian Level)

Project Name: Demo_Project
Report Generated Date: 8/13/2013 8:01:17 PM
Report Created By: super

Custodian Name: Custodian_1

File Id	Relative File Path	Noted Added By	Notes Added On	Accessibility	Document Note
4037	\albert_meyers_000.pst\albert_meyers_000\meyers-a\ExMerge - Meyers, Albert\Inbox\Trader Presentations - 2/7 @ 2:30 p.m. (CST) in Conf RM 06980.msg	super	7/24/2013 11:37:59 PM	Public	Test document notes.

13.4.9 Field Coding Log Report

To generate a Field Coding Log report, go to Report > User Reports > Field Coding Log Report.

The report header will include the Project Name, Report Generated Date and Report Created By. In the Field Coding Log report, the following details will be included:

- Batch ID: Assigned Batch ID that applied code for documents.
- Field Name: Name of field on which code was applied.
- File Count: Total number of documents on which code was applied.
- Value: Value inserted in the coding field.
- Coding Action: Action performed on coding the documents.
- Coding From: Code can be applied either from Search or Review, so that is indicated here.
- Applied By: User who applied the code to the documents.
- Applied Date: Date the code was applied to the documents.

VenioOne

Coding Field Log Report

Project Name: KING KOZ

Report Generated Date: 2/5/2020 5:13:19 PM

Report Created By: super

Batch Id	Field Name	File Count	Value	Coding Action	Coding From	Applied By	Applied Date
9	CUSTOM_01	1	Attorneys' Eyes Only	OVERRIDE_EXISTING_VALUE	SEARCH	super	02/05/2020 5:08:36 PM
9	CUSTOM_02	1	Sensitive	OVERRIDE_EXISTING_VALUE	SEARCH	super	02/05/2020 5:08:36 PM
10	CUSTOM_01	1	Attorneys' Eyes Only	OVERRIDE_EXISTING_VALUE	SEARCH	super	02/05/2020 5:08:58 PM
10	CUSTOM_02	1	Sensitive	OVERRIDE_EXISTING_VALUE	SEARCH	super	02/05/2020 5:08:58 PM
11	CUSTOM_02	1	Attorneys' Eyes Only	OVERRIDE_EXISTING_VALUE	SEARCH	super	02/05/2020 5:10:08 PM
11	CUSTOM_00	1	Sensitive	OVERRIDE_EXISTING_VALUE	SEARCH	super	02/05/2020 5:10:08 PM

13.4.10 Doc Viewer Log Report

To generate a Doc Viewer Log report, go to Report > User Reports > Doc Viewer Log Report.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Doc Viewer Log report, the following details will be included:

- File ID: Assigned File ID for the document that was viewed.
- Field Name: The name of document on which was viewed in the viewer.
- Viewed From: The module from where the documents were viewed.
- Viewed On: The date on when the documents were viewer.

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Viewer Log Report

Project	Test export delete
Report Generated Date	8/22/2017 2:17:11 PM
Report Created By	super

super (super)

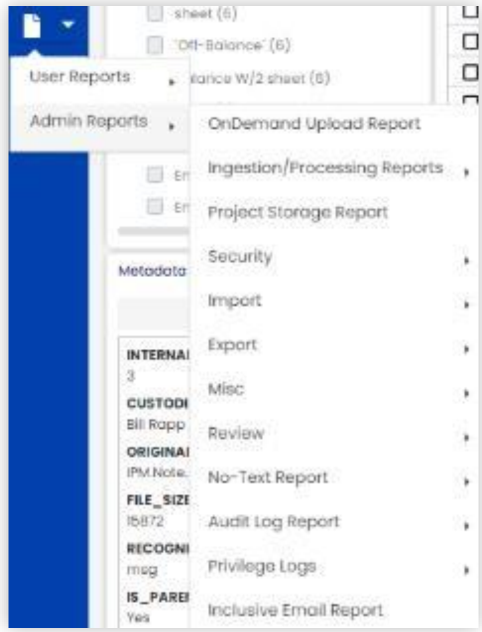
File ID	File Name	Viewed From	Viewed On
2	Wednesday ENPOWER CLEANUP meeting 4-4-01.msg	Search	8/18/2017 3:50:09 PM
2	Wednesday ENPOWER CLEANUP meeting 4-4-01.msg	Search	8/18/2017 3:52:21 PM
2	Wednesday ENPOWER CLEANUP meeting 4-4-01.msg	Search	8/18/2017 3:54:26 PM
29	Re: Approval is Overdue: Access Request for jim.reyes@enron.com.msg	Review	8/21/2017 2:01:33 PM
29	Re: Approval is Overdue: Access Request for jim.reyes@enron.com.msg	Review	8/21/2017 2:02:45 PM
6	Re: Houston meeting.msg	Review	8/21/2017 2:53:28 PM
29	Re: Approval is Overdue: Access Request for jim.reyes@enron.com.msg	Review	8/21/2017 4:51:42 PM
6	Re: Houston meeting.msg	Review	8/21/2017 5:00:12 PM
2	Wednesday ENPOWER CLEANUP meeting 4-4-01.msg	Search	8/22/2017 10:38:35 AM
6	Re: Houston meeting.msg	Review	8/22/2017 11:30:43 AM

13.5 Admin Reports

In VOD, you can create Admin Reports that will give you information pertaining to the settings in your project. You can generate reports for Project Settings, Ingestion / Processing Settings, Security Settings, Export Settings, other Miscellaneous details, and Review.

Admin Reports fall into the following main categories. For detailed information, refer to the respective report sections below.

- Project Settings Report
- OnDemand Upload Report
- Ingestion/Processing Reports
- Project Storage Report
- Security Reports
- Import Reports
- Export Reports
- Misc. Reports
- Review Reports
- No-Text Report
- Audit Log Reports
- Privilege Logs Reports
- Inclusive Email Report



13.5.1 Project Settings Report

The Project Settings report gives you information pertaining to the settings you selected at the start of your project.

To generate a Project Settings report, go to Report > Admin Reports > Project Settings.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Project Settings report, the following details will be included:

- Project Name: Name of the project provided by the user.
- Project Created By: User who created the project.
- Date/Time Project Created: Date and time the project was created.
- Project Location: Location where the project was created.
- Project Matter: Optional user field.
- De-Duplication: Hash Algorithm selected to filter the duplicate files.
- System File Folder: If the File Type Restriction option was checked, this will show ‘TRUE’ and the File Filter Type will be populated with ‘Denist and System’. Otherwise, it will be ‘FALSE’ and the File Filter Type will be left blank.
- File Extension Restriction: If the File Extension Restriction option was checked, this will show ‘YES’ and the Filtered Extensions will be listed. Otherwise, it will be ‘NO’ and the Filtered Extensions will be left blank.

- File Type Restriction: If the File Type Restriction option was checked, this will show 'YES' and the Restricted File Types will be listed. Otherwise, it will be 'NO' and the File Type Restrictions will be left blank.
- Date Restriction: If the Date Restriction option was checked, this will show 'YES' and the date ranges will be listed. Otherwise, it will be 'NO' and the Date Restrictions will be left blank.
- Embedded File Filter: Indicates whether you elected to exclude embedded files from Email, EDOC, and/or PPT files.
- Indexing: Indicates whether the project was created as a searchable database. If so, it will display 'YES' and the type of index will be listed as FullText Index and/or Metadata Index. Otherwise, it will be 'NO' and the Indexing will be left blank.
- Language Identification: If the Language Identification option was checked, this will show 'TRUE'. Otherwise, it will be 'FALSE'.
- Email Analytics: If the Email Analytics option was checked, this will show 'TRUE'. Otherwise, it will be 'FALSE'.
- OCR: If the OCR option was checked, this will show 'TRUE', the selected File Types will be listed and the OCR Queuing will be 'FALSE'. Otherwise, it will be 'FALSE', the File Types will be left blank and the OCR Queuing will be 'TRUE'.
- Processing Time per File: Maximum processing time allotted for each file.
- Tiffing Settings: In the pages that follow, you will see the TIFF settings.
- Hash Field: Comma separated hash fields selected during project creation.

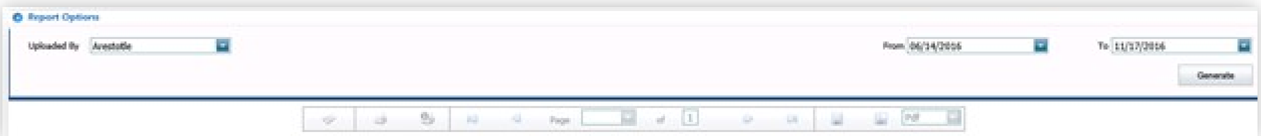
Updated By : ctamrakar@veniosystems.com **Updated Date :** 7/9/2024 3:33:54 AM

Project Name	ct-test
Project Created By	ctamrakar@veniosystems.com
Date/Time Project Created	7/9/2024 3:33:47 AM
Project Location	\\fs02.ad.veniosystems.com\VS\QC01\Internal\Case\ct-test
Index Location	\\fs02.ad.veniosystems.com\VS\QC01\Internal\Case\ct-test\VenioIndexLoc
Project Matter	
Internal Domain	
De-Duplication Hash Algorithm	SHA1
Secondary Hash Algorithm	
Hash Field	EmailAttachmentName, EmailBCC, EmailCC, EmailFrom, EmailSubject, EmailTo, EmailDateSentGMT, ChildCRC32Hash
System File Filter	Yes
File Filter Type	DE-NIST AND SYSTEM
File Extension Restriction	No
Filter Level	No

13.5.2 Upload Report

To generate an Upload report, go to Report > Admin Reports > Upload Report.

The Report Options will be displayed.



Select the name of the person who did the upload from the Uploaded By drop-down list.
Select the starting and ending dates from the From and To drop-down lists.
Click Generate.

The upload report will be generated.

13.5.3 Ingestion /Processing Reports

The Ingestion/Processing reports give you information pertaining to the ingestion and processing of your data.

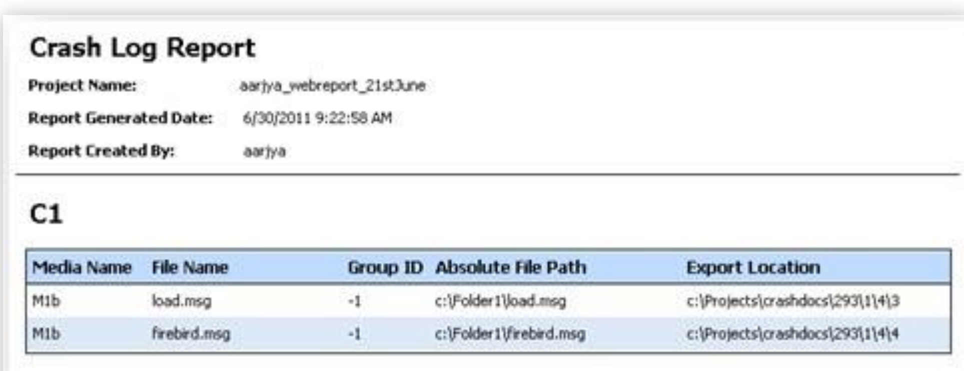
13.5.3.1 Crash Log Report

To generate a Crash Log report, go to Report > Admin Reports > Ingestion/Processing Reports > Crash Log Report.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Crash Log report, the following details will be included:

- Media Name: Media where the crashed file is located.
- File Name: Name of file that crashed.
- Group ID: Parent ID of crashed file.
- Absolute File Path: Path to file causing crash.
- Export Location: Path to where crashed file is exported.



Crash Log Report

Project Name: aarjya_webreport_21stJune
Report Generated Date: 6/30/2011 9:22:58 AM
Report Created By: aarjya

C1

Media Name	File Name	Group ID	Absolute File Path	Export Location
M1b	load.msg	-1	c:\Folder1\load.msg	c:\Projects\crashdocs\293\1\4\3
M1b	firebird.msg	-1	c:\Folder1\firebird.msg	c:\Projects\crashdocs\293\1\4\4

13.5.3.2 Ingestion Exception Log Detail Report

To generate an Ingestion Exception Log report, go to Report > Admin Reports > Ingestion/Processing Reports > Ingestion Exception Log Detail Report.

The report header will include the Project Name, Report Generated Date, Report Created By, Custodian Name and Media Name.

In the Ingestion Exception Log Detail report, the following details will be included:

- Time Stamp: Date and time when exception occurred.
- Type: Type of exception.
- Message: Error message for exception file.
- Target Site: System field.
- Stack Trace: System field.

Ingestion Exception Log Report

Project Name :	Test_Ingestion_exception
Report Generated Date :	6/29/2011 12:12:25 PM
Report Created By:	aarjya

Custodian Name : b

Media Name : b

S No. :	1
Time Stamp :	1/20/2011 11:34:58 AM
Type :	FileNotFoundException
Message :	D:\f\MODI Installation.doc Not Found
Target Site :	Void Assert(System.String)
Stack Trace :	at Sccfi.Net.FileID.Assert(String FileName) at Sccfi.Net.FileID.GetFileDetailEx(String FileName, FileExFlag Flag) at VenioIngestion.Extraction.FileIdentifier.GetFileInfo(String FileName) in D:\trunk\Trunk_source\VenioDesktop\VenioIngestion\Extraction\FileIdentifier.cs:line 31

S No. :	2
Time Stamp :	1/20/2011 11:34:58 AM
Type :	FileNotFoundException
Message :	D:\f\OCR Management.doc Not Found
Target Site :	Void Assert(System.String)
Stack Trace :	at Sccfi.Net.FileID.Assert(String FileName) at Sccfi.Net.FileID.GetFileDetailEx(String FileName, FileExFlag Flag) at VenioIngestion.Extraction.FileIdentifier.GetFileInfo(String FileName) in D:\trunk\Trunk_source\VenioDesktop\VenioIngestion\Extraction\FileIdentifier.cs:line 31

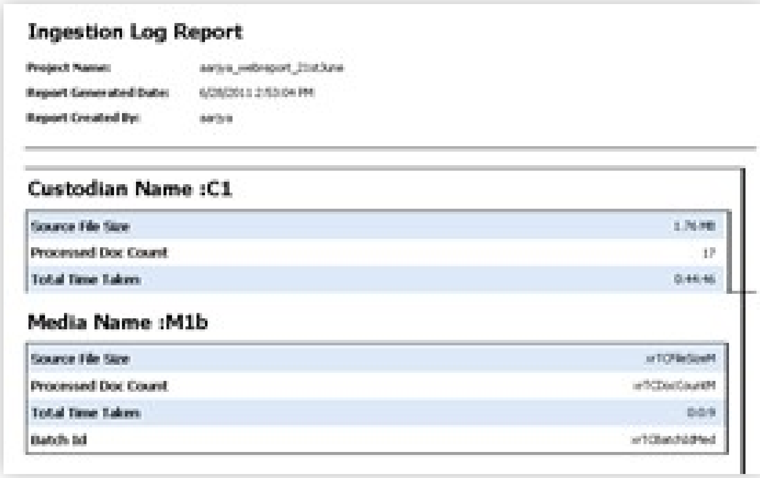
13.5.3.3 Ingestion Log Report

To generate an Ingestion Log report, go to *Report > Admin Reports > Ingestion/Processing Reports > Ingestion Log Report*.

The report header will include the *Project Name, Report Generated Date*, *Report Created By, Custodian Name,* and *Media Name*.

In the Ingestion Log report, the following details will be included:

- Source File Size: Size of original source file.
- Processed Doc Count: Number of documents ingested/processed.
- Total Time Taken: Total time taken to ingest/process the data.
- Batch ID: System assigned identifier.



Ingestion Log Report

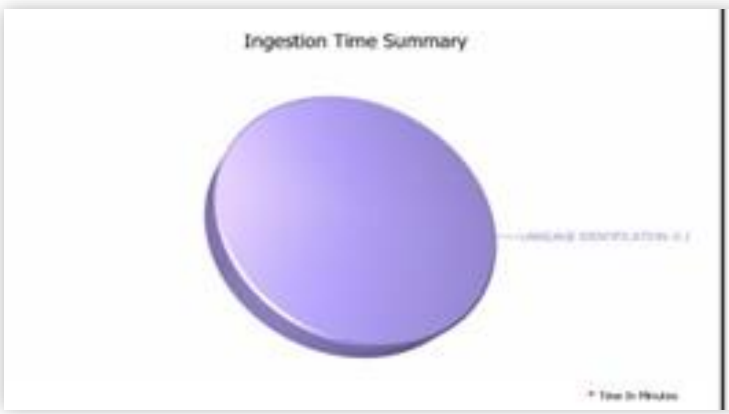
Project Name:	[illegible]
Report Generated Date:	[illegible]
Report Created By:	[illegible]

Custodian Name :C1

Source File Size	1.76 MB
Processed Doc Count	17
Total Time Taken	0:44:46

Media Name :M1b

Source File Size	[illegible]
Processed Doc Count	[illegible]
Total Time Taken	[illegible]
Batch Id	[illegible]



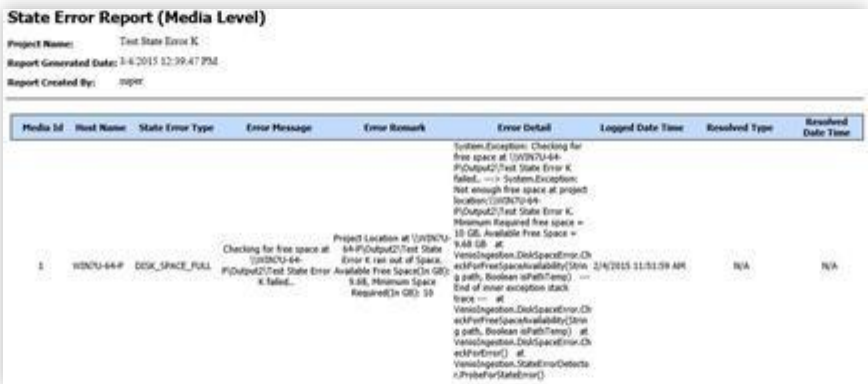
13.5.3.4 State Error Report

To generate an State Error report, go to *Report* > *Admin Reports* > *Ingestion/Processing Reports* > *State Error Report*.

The report header will include the *Project Name, Report Generated Date,* and *Report Created By*.

In the State Error Log report, the following details will be included:

- Media ID: Associated Media ID.
- Host Name: Machine name by which ingestion performed.
- State Error Type: Type of error.
- Error Message: Details of state error type.
- Error Remarks: Remarks of state error type.
- Error Details: Details of state error type.
- Logged Date Time: Time when state error occurred.
- Resolved Type: Any action performed that resolved the error.
- Resolved Date Time: Date and time the error was resolved.



State Error Report (Media Level)

Project Name: Test State Error K
Report Generated Date: 3-4-2015 12:39:47 PM
Report Created By: super

Media Id	Host Name	State Error Type	Error Message	Error Remark	Error Detail	Logged Date Time	Resolved Type	Resolved Date Time
1	WIN7U-64-P	DISK_SPACE_FULL	Checking for free space at \\WIN7U-64-P\Output2\Test State Error K failed...	Project Location at \\WIN7U-64-P\Output2\Test State Error K ran out of Space. Available Free Space(In GB): 9.68, Minimum Space Required(In GB): 10	System.Exception: Checking for free space at \\WIN7U-64-P\Output2\Test State Error K failed.. ---> System.Exception: Not enough free space at project location:\\WIN7U-64-P\Output2\Test State Error K. Minimum Required free space = 10 GB. Available Free Space = 9.68 GB at VenioIngestion.DiskSpaceError.CheckForFreeSpaceAvailability(String path, Boolean isPathTemp) --- End of inner exception stack trace --- at VenioIngestion.DiskSpaceError.CheckForFreeSpaceAvailability(String path, Boolean isPathTemp) at VenioIngestion.DiskSpaceError.CheckForError() at VenioIngestion.StateErrorDetector.ProbeForStateError()	2/4/2015 11:51:59 AM	N/A	N/A

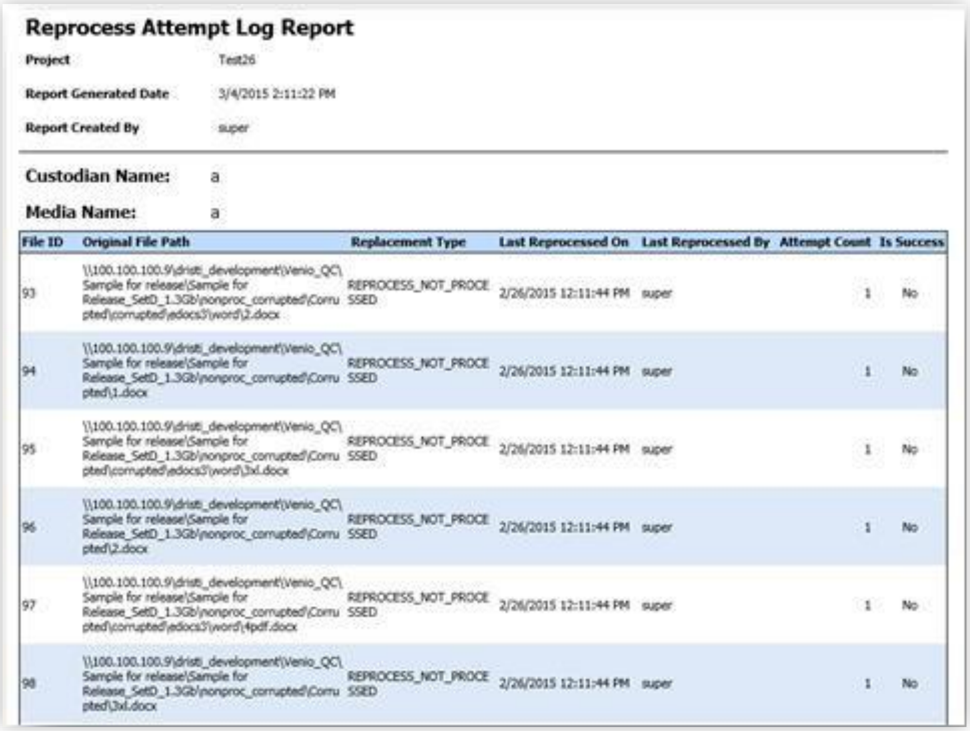
13.5.3.5 Reprocess Attempt Log Report

To generate an Ingestion Log report, go to Report > Admin Reports > Ingestion/Processing Reports > Reprocess Attempt Log Report.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Reprocess Attempt Log report, the following details will be included:

- File ID: Associated File ID of document that was reprocessed.
- Original File Path: The original file path of respective document of File ID.
- Replacement Type: The action performed to reprocess respective document of File ID.
- Last Reprocessed By: Latest user by whom performed to reprocess documents.
- Attempt Count: Number of reprocess count of documents.
- Is Success: Status of reprocess documents.



Reprocess Attempt Log Report

Project	Test26
Report Generated Date	3/4/2015 2:11:22 PM
Report Created By	super

Custodian Name: a

Media Name: a

File ID	Original File Path	Replacement Type	Last Reprocessed On	Last Reprocessed By	Attempt Count	Is Success
93	\\100.100.100.9\dristi_development\Venio_QC\Sample for release\Sample for Release_SetD_1.3Gb\nonproc_corrupted\Corrupted\corrupted\edocs3\word\2.docx	REPROCESS_NOT_PROCESSED	2/26/2015 12:11:44 PM	super	1	No
94	\\100.100.100.9\dristi_development\Venio_QC\Sample for release\Sample for Release_SetD_1.3Gb\nonproc_corrupted\Corrupted\1.docx	REPROCESS_NOT_PROCESSED	2/26/2015 12:11:44 PM	super	1	No
95	\\100.100.100.9\dristi_development\Venio_QC\Sample for release\Sample for Release_SetD_1.3Gb\nonproc_corrupted\Corrupted\corrupted\edocs3\word\3xl.docx	REPROCESS_NOT_PROCESSED	2/26/2015 12:11:44 PM	super	1	No
96	\\100.100.100.9\dristi_development\Venio_QC\Sample for release\Sample for Release_SetD_1.3Gb\nonproc_corrupted\Corrupted\2.docx	REPROCESS_NOT_PROCESSED	2/26/2015 12:11:44 PM	super	1	No
97	\\100.100.100.9\dristi_development\Venio_QC\Sample for release\Sample for Release_SetD_1.3Gb\nonproc_corrupted\Corrupted\corrupted\edocs3\word\4pdf.docx	REPROCESS_NOT_PROCESSED	2/26/2015 12:11:44 PM	super	1	No
98	\\100.100.100.9\dristi_development\Venio_QC\Sample for release\Sample for Release_SetD_1.3Gb\nonproc_corrupted\Corrupted\3xl.docx	REPROCESS_NOT_PROCESSED	2/26/2015 12:11:44 PM	super	1	No

13.5.4 Security Reports

The Security reports give you information pertaining to the logins and security settings for the users in the system.

13.5.4.1 Login/Logout Report

To generate a Login/Logout report, go to Report > Admin Reports > Security > Login/Logout Report.

The Login/Logout Options dialog displays options to filter your report.

Select the User, Date Range and System Module filter you with to apply and click Generate.

The report header will include the Project Name, Report Generated Date and Report Created By.

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In the Login/Logout report, the following details will be included:

- Username: Login used to access the system.
- IP Address: IP Address of computer used to access the system.
- Login Date Time: Date and time user logged into the system.
- Logout Date Time: Date and time user logged out of the system.

Login/Logout Report

Project Name: Enron Demo Project

Report Generated Date: 11/17/2016 10:48:44 AM

Report Created By: Techwriter

DESKTOP

Username	Ip Address	Login Date Time	Logout Date Time
super	fe80::84e6:5ba7:8806:5193%12,fe80::241f:817:93cc:d6ef%15,192.168.1.14,2001:0:9d38:6abd:241f:817:93cc:d6ef	2/6/2015 7:10:47 AM	2/6/2015 7:15:38 AM
super	fe80::2847:3779:c6be:e18e%21,fe80::3869:216f:3f57:fef2%17,192.168.1.13,2001:0:5ef5:79fb:3869:216f:3f57:fef2	2/16/2015 10:05:46 AM	2/16/2015 10:05:57 AM
super	fe80::2847:3779:c6be:e18e%21,fe80::3869:216f:3f57:fef2%17,192.168.1.13,2001:0:5ef5:79fb:3869:216f:3f57:fef2	2/24/2015 8:50:34 AM	2/24/2015 8:55:24 AM
super	fe80::84e6:5ba7:8806:5193%12,fe80::283a:2a6e:3f57:fef1%15,192.168.1.14,2001:0:5cf2:8c15:283a:2a6e:3f57:fef1	6/10/2015 2:43:42 AM	6/10/2015 2:49:35 AM

WEB

Username	Ip Address	Login Date Time	Logout Date Time
babs	70.164.46.15	1/23/2015 12:21:47 PM	
super	202.51.64.184	2/5/2015 12:31:51 AM	
Techwriter	fe80::5d9b:ef58:a0f8:754%15	11/9/2016 1:58:49 PM	
Techwriter	192.168.1.1	11/9/2016 2:52:26 PM	
Techwriter	192.168.1.1	11/11/2016 4:13:08 AM	
Techwriter	192.168.1.1	11/11/2016 5:31:17 AM	
Techwriter	192.168.1.1	11/11/2016 8:17:28 AM	

13.5.4.2 Associated Users Report

To generate an Associated Users report, go to Report > Admin Reports > Security > Associated Users.
The report header will include the Project Name, Report Generated Date and Report Created By.

In the Associated Users report, the following details will be included for all Active and Locked users:

- Full Name: Full name of user.
- User Name: Assigned login name of user.
- Global User Role: Role of the user: System Admin, User Admin or User and Client.
- Project User Group: Name of the project user group.
- Desktop Access: Whether the user has access to VenioOne Desktop or not
- Web TOA Access: Whether the user has access to VenioOne Web or not
- Review Access: Whether the user has access to the review section in VenioOne Web or not
- Touch Access: Whether the user has access to VenioOne Touch or not.
- Total # Users: Total number of users with access to the selected project
- Total # Desktop Users: Total number of users with access to VenioOne Desktop.
- Total # Review Users: Total number of users with access to VenioOne Web.
- Total # Review Users: Total number of users with access to the review section in VenioOne Web.
- Total # Touch Users: Total number of users with access to VenioOne Touch.

Associated Users

Project Name: Enron Demo Project
Report Generated Date: 11/17/2016 10:50:27 AM
Report Created By: Techwriter

User Status : Active

Full Name	Username	Global User Role	Project User Group	Desktop Access	Web ECA Access	Review Access	Touch Access
super	super	Venio Admin	Enron Demo Project-Site Admin Group	Yes	Yes	Yes	Yes
Sudeep KC	sudeep	Venio Admin	Enron Demo Project-Site Admin Group	Yes	Yes	Yes	Yes
Steven Tan	stevan	Venio Admin	Enron Demo Project-Site Admin Group	Yes	Yes	Yes	Yes
Chris	Chris	Venio Admin	Enron Demo Project-Site Admin Group	Yes	Yes	Yes	Yes
Arestotle Thapa	Arestotle	Venio Admin	Enron Demo Project-Site Admin Group	Yes	Yes	Yes	Yes

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13.5.5 Import Reports

The Import reports give you information pertaining to the data you have imported into your project.

13.5.5.1 Import Settings Report

To generate an Import Settings report, go to Report > Admin Reports > Import > Import Settings.

You will need to select the Import you wish to report on from the list and click Generate to continue.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Import Settings report, the settings you selected during import will be included.

Import Settings

Project Name:	Demo_Project
Report Generated Date:	8/13/2013 10:57:29 PM
Report Created By:	super

Import Id: 1

Custodian Type		User Input
	Custodian Name	DEMO_IMPORT
Media Type		User Input
	Media Name	DEMO_MEDIA
	Media Prefix	N/A
	Start Number	N/A
	Number Padding	N/A
	Records Per Media	N/A
FullText Copy Option		
	FullText Mapping Field	EXPORT_PATH_FULLTEXT
	Copy FullText Type	Copy To Project Location
Native Copy Option		
	Native Mapping Field	EXPORT_PATH_NATIVE
	Copy Native Type	Copy To Project Location
HTML Copy Option		
	HTML Mapping Field	N/A
	Copy HTML Type	N/A
Data Settings		
	Date Format	MM/DD/YYYY
	Time Zone	Etc/GMT

13.5.6 Export Reports

The Export reports give you information pertaining to the data you have exported from your project.

13.5.6.1 Export Summary Report

To generate an Export Summary report, go to Report > Admin Reports > Export > Summary. You will then have to select Project Level or Custodian Level.

13.5.6.1.1 Project Level

Report is generated on the Project Level. You will need to select the Export you wish to generate the report for. Click Generate to continue.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Export Summary report, the following details will be included:

- Total Export Native File Sizes: Size of all the native files that have been exported, given in Bytes. If Native files were not included, this will display 0 Bytes.
- Total Export Native File Count: Total number of native files that have been exported. If Native files were not included, it will display 0.
- Total # Duplicate Files Exported: Count of all the duplicate documents, if included while exporting. Otherwise, it will display 0.
- Total # NIST Files Exported: Count of all the NIST files, if included while exporting. Otherwise, it will display 0.
- Total # System Files Exported: Count of all the system files, if included while exporting. If this is not selected while exporting or no system files exist, it will display 0.
- Total # Non-Processable Files Exported: Count of all the non-processable files, if included while exporting. If this is not selected while exporting or no non-processable files exist, it will display 0.
- Total # Archive/Password Protected Files Exported: Count of all the archive/password protected files, if included while exporting. If this is not selected while exporting or no archive/password protected files exist, it will display 0.
- Total # Parent Emails Exported: Count of all the emails present in the project.
- Total # Attachments Exported: Count of all attachments present in the emails.
- Total # Edocs Exported: Count of all EDOCS present in the project.
- Total # Custodians Exported: Count of all custodians present in the selected export. If an export has not been performed, it will display 0.
- Export Path: Path where the project was exported. Blank if no export was done.

- Date/Time: Date and time when the export was performed. Blank, if no export was done.
- Export Control Number Range: Range of control numbers for which export is done.

NOTE: If no documents were exported, No documents to report. message will be displayed.

Export Summary

Project Name:	produc'.
Report Generated Date:	8/7/2023 2:24:04 PM
Report Created By:	super

Export Name: qwertyuio

Total # Custodians Exported	8
Export Path	\\WSAMZN-UA3G019M\Vod\Export\Internal\Production\produc\qwertyuio
Export Start Date	7/31/2023 4:15:13 PM
Export End Date	7/31/2023 4:37:41 PM
Export Control Number Range	00000001 - 00004960
Export Bates Number Range	IMG00000001 - IMG00004960
Total Document Count	4960
Size of Export Folder	13.1921 GB
Redaction Set	ALL
Total Export Native File Counts	4,960
Total Export Native File Sizes	12.6604 GB
Total # Duplicate Files Exported	3,183
Total # NIST Files Exported	0
Total # System Files Exported	0
Total # Non Process Files Exported	31
Total # Archive Files Exported	0
Total # Password Protected Files Exported	0
Total # Parent Emails Exported	160
Total # Attachments Exported	1,493
Total # Edocs Exported	114
Count of Fulltext	4960
Size of Fulltext	90.6343 MB
Count of Images	4960
Size of Images	13.6862 MB

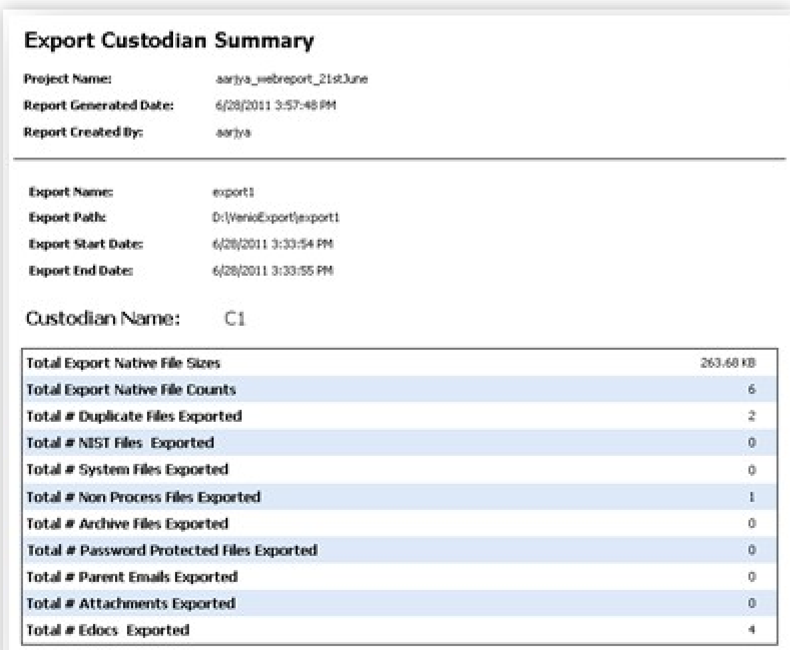
13.5.6.1.2 Custodian Level

Report is generated on a Custodian Level. You will need to choose the Custodian and Export you wish to view in your report. Check the desired Custodian and Export, then click Generate to continue.

The report header will include the Project Name, Report Generated Date, Report Created By and Custodian Selected.

In the Export Custodian Summary report, the following details will be included for each Custodian selected:

- Total Export Native File Sizes
- Totals Export Native File Count
- Total # Duplicate Files Exported
- Total # NIST Files Exported
- Total # System Files Exported
- Total # Non-Process Files Exported
- Total # Archive Files Exported
- Total # Password Protected Files Exported
- Total # Parent Emails Exported
- Total # Attachments
- Total # EDOCS Exported



Export Custodian Summary

Project Name: aarjya_webreport_21stJune
Report Generated Date: 6/28/2011 3:57:48 PM
Report Created By: aarjya

Export Name: export1
Export Path: D:\VenioExport\export1
Export Start Date: 6/28/2011 3:33:54 PM
Export End Date: 6/28/2011 3:33:55 PM

Custodian Name: C1

Total Export Native File Sizes	263.68 KB
Total Export Native File Counts	6
Total # Duplicate Files Exported	2
Total # NIST Files Exported	0
Total # System Files Exported	0
Total # Non Process Files Exported	1
Total # Archive Files Exported	0
Total # Password Protected Files Exported	0
Total # Parent Emails Exported	0
Total # Attachments Exported	0
Total # Edocs Exported	4

13.5.6.2 Export Tag Summary Report

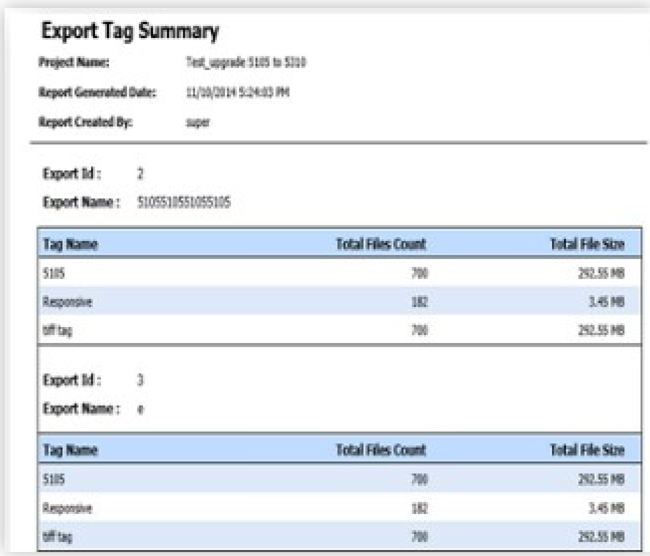
To generate a Tag Summary report, go to Report > Admin Reports > Export > Tag Summary.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Export Tag Summary report, the following details will be included:

- Export ID: Individual ID of each export.
- Export Name: Name of the export.
- Tag Name: Name of the tag used for the export.
- Total Files Count: Total number of documents that have been exported.
- Total File Size: Total size of all the documents that have been exported.

NOTE: If no documents were exported, a No documents to report. message will appear.



Export Tag Summary

Project Name: Test_upgrade 5105 to 5110

Report Generated Date: 11/10/2014 5:24:03 PM

Report Created By: super

Export Id : 2

Export Name : 510551055105105

Tag Name	Total Files Count	Total File Size
5105	700	292.55 MB
Responsive	182	3.45 MB
tiff tag	700	292.55 MB

Export Id : 3

Export Name : e

Tag Name	Total Files Count	Total File Size
5105	700	292.55 MB
Responsive	182	3.45 MB
tiff tag	700	292.55 MB

13.5.6.3 Export File Detail Report

To generate a File Detail report, go to Report > Admin Reports > Export > File Detail.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Export File Detail report, the following details will be included:

- File ID: The ID for each file that has been exported.
- Export ID: The ID for each export performed. The set of documents that are exported together will have the same Export ID.

- File Name: The name of each exported document.
- Hash Value: The hash value for each exported file.
- Custodian Name: The name of the custodian in which each of the exported files belong.
- Original File Path: The path where the exported documents originally reside.
- Export File Path: The path where the exported documents are stored.

NOTE: If no documents are exported, a No documents to report. message will appear.

Export File Detail

Project Name: aarjya_webreport_21stJune

Report Generated Date: 6/28/2011 4:58:23 PM

Report Created By: aarjya

File ID	Export ID	File Name	Hash Value	Custodian Name	Original File Path	Export File Path
14	1	Copy of rmi.riff	AA4CDAB911E956439F85 53772B56CD01993E9E12	C1	D:\Template\sample for release\12 audio clips+5 duplicate so edoc=12 n dup=5\Copy of rmi.riff	D:\VenioExport\export1
15	1	mediaexample.mp3	4F23EEBE515291CC15408 551C9AAE862C745FB5E	C1	D:\Template\sample for release\12 audio clips+5 duplicate so edoc=12 n dup=5\mediaexample.mp3	D:\VenioExport\export1
16	1	Copy of mediaexample.mp3	4F23EEBE515291CC15408 551C9AAE862C745FB5E	C1	D:\Template\sample for release\12 audio clips+5 duplicate so edoc=12 n dup=5\Copy of mediaexample.mp3	D:\VenioExport\export1
20	1	rmi.riff	AA4CDAB911E956439F85 53772B56CD01993E9E12	C1	D:\Template\sample for release\12 audio clips+5 duplicate so edoc=12 n dup=5\rmi.riff	D:\VenioExport\export1
22	1	spacemusic.au	D1C6AD4222229CF00678 9E069A4EB405C1D09963	C1	D:\Template\sample for release\12 audio clips+5 duplicate so edoc=12 n dup=5\spacemusic.au	D:\VenioExport\export1
25	1	M1F1-Alaw-AFsp.wav	036D58747D251E9A9A53 79252E518F537D17AA95	C1	D:\Template\sample for release\12 audio clips+5 duplicate so edoc=12 n dup=5\M1F1-Alaw-AFsp.wav	D:\VenioExport\export1

13.5.7 Misc Reports

The Misc reports give you information pertaining to various exceptions in your project.

13.5.7.1 Remaining File Type Summary Report

To generate a Remaining File Type Summary report, go to Report > Admin Reports > Misc > Remaining File Type Summary.

13.5.7.1.1 Project Level

Report is generated on the Project Level.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Remaining File Type Summary report, the following details will be included:

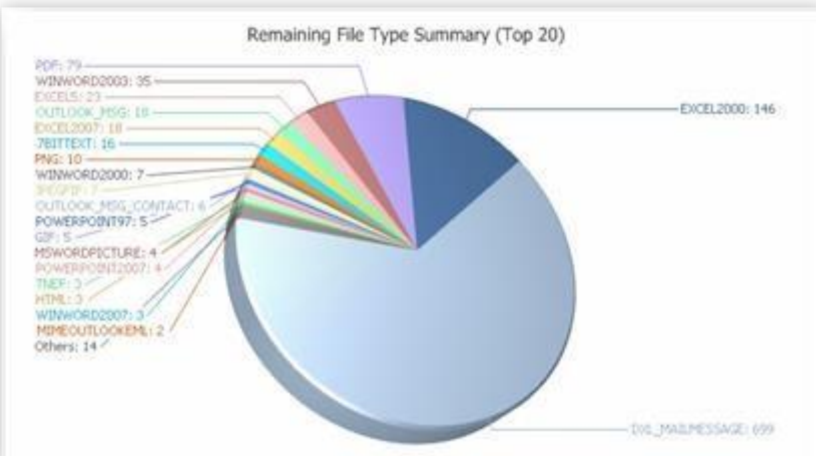
- File Type
- File Type Description
- File Extension
- Total File Count
- Total File Size

Ingestion Remaining File Type Summary (Project Level)

Project Name: Enron Demo Project
Report Generated Date: 11/17/2016 11:09:23 AM
Report Created By: Techwriter

File Type	Total File Count	Total File Size
Bitmap	3	707.06 KB
Email	6,893	536.82 MB
Graphic	20	510.39 KB
HTML	7	133.16 KB
JPG	66	9.52 MB

You will also get a Pie Chart that illustrates the Top 20 File Types for the whole project



13.5.7.1.2 Custodian Level

Report is generated on a Custodian Level. You will need to choose the Custodians you wish to view in your report. Check the desired Custodians and click Generate.

The report header will include the Project Name, Report Generated Date, Report Created By and Custodian Selected.

In the Remaining File Type Summary report, the following details will be included for each Custodian selected:

Venio

- File Type
- File Type Description
- File Extension
- Total File Count
- Total File Size

You will also get a Pie Chart that illustrates the Top 20 File Types for each Custodian.

Ingestion Remaining File Type Summary (Custodian Level)

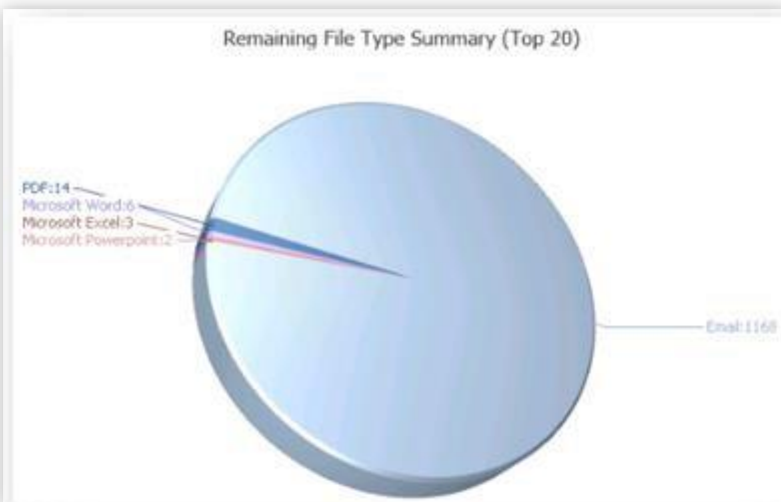
Project Name: Enron Demo Project

Report Generated Date: 11/17/2016 11:13:22 AM

Report Created By: Techwriter

Albert Myers

File Type	Total File Count	Total File Size
Email	1,168	30.54 MB
Microsoft Excel	3	1.84 MB
Microsoft Powerpoint	2	266.5 KB
Microsoft Word	6	135.5 KB
PDF	14	683.26 KB



13.5.7.2 Exception File Directory Report

To generate an Exception File Directory report, go to Report > Admin Reports > Misc > Exception File Directory.

13.5.7.2.1 Project Level

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Report is generated on the Project Level.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Exception File Directory report, the following details will be included:

- FileID: The File ID of the exception file.
- File Name: The File Name of the exception file.
- Error Log: The reason for the exception.
- File Path: The location of the exception file.

Ingestion Project Exception File Directory

Project Name: Enron Demo Project

Report Generated Date: 11/17/2016 8:22:28 PM

Report Created By: Techwriter

File ID	File Name	Error Log	File Path
1247	#1.dat	Unknown FileType	\\NFSROOT\zpool1_volume1_share1\VenioTestData\600GB - Copied from Seagate Backup Drive\EDRM_enron\andy_zipper_000.pstRE: Trade Count and Volumes for Feb 26, 2001.msg#1.dat
1249	#1.dat	Unknown FileType	\\NFSROOT\zpool1_volume1_share1\VenioTestData\600GB - Copied from Seagate Backup Drive\EDRM_enron\andy_zipper_000.pstDynegy-ICE Vol Apr27.msg#1.dat
1251	#1.dat	Unknown FileType	\\NFSROOT\zpool1_volume1_share1\VenioTestData\600GB - Copied from Seagate Backup Drive\EDRM_enron\andy_zipper_000.pstRE: Trade Count and Volumes for Feb 26, 2001.msg#1.dat
1283	#1.dat	Unknown FileType	\\NFSROOT\zpool1_volume1_share1\VenioTestData\600GB - Copied from Seagate Backup Drive\EDRM_enron\andy_zipper_000.pstDynegy-ICE VOL May30.msg#1.dat

13.5.7.2.2 Custodian Level

Report is generated on a Custodian Level. You will need to choose the Custodians you wish to view in your report. Check the desired Custodians and click Generate.

The report header will include the Project Name, Report Generated Date, Report Created By and Custodian Selected.

In the Custodian Exception File Directory report, the following details will be included for each Custodian selected:

- FileID: The File ID of the exception file.
- File Name: The File Name of the exception file.
- Error Log: The reason for the exception.
- File Path: The location of the exception file.

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Ingestion Custodian Exception File Directory

Project Name: Enron Demo Project

Report Generated Date: 11/17/2016 8:24:03 PM

Report Created By: Techwriter

Andy Zipper

File ID	File Name	Error Log	File Path
1247	#1.dat	Unknown FileType	\\NFSROOT\zpool1_volume1_share1\VenioTestData\600GB - Copied from Seagate Backup Drive\EDRM_enron\andy_zipper_000.pstRE: Trade Count and Volumes for Feb 26, 2001.msg#1.dat
1249	#1.dat	Unknown FileType	\\NFSROOT\zpool1_volume1_share1\VenioTestData\600GB - Copied from Seagate Backup Drive\EDRM_enron\andy_zipper_000.pstDynegy-ICE Vol Apr27.msg#1.dat
1251	#1.dat	Unknown FileType	\\NFSROOT\zpool1_volume1_share1\VenioTestData\600GB - Copied from Seagate Backup Drive\EDRM_enron\andy_zipper_000.pstRE: Trade Count and Volumes for Feb 26, 2001.msg#1.dat

13.5.7.3 Not Indexed File Type Summary Report

To generate a Not Indexed File Type Summary report, go to Report > Admin Reports > Misc > Not Indexed File Type Summary. This report covers non-processable and password protected files.

13.5.7.3.1 Project Level

Report is generated on the Project Level

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Not Indexed File Type Summary report, the following details will be included:

- File Type
- File Type Description
- Original File Counts
- Duplicate File Counts
- Total File Counts
- Original File Sizes
- Duplicate File Sizes
- Total File Sizes

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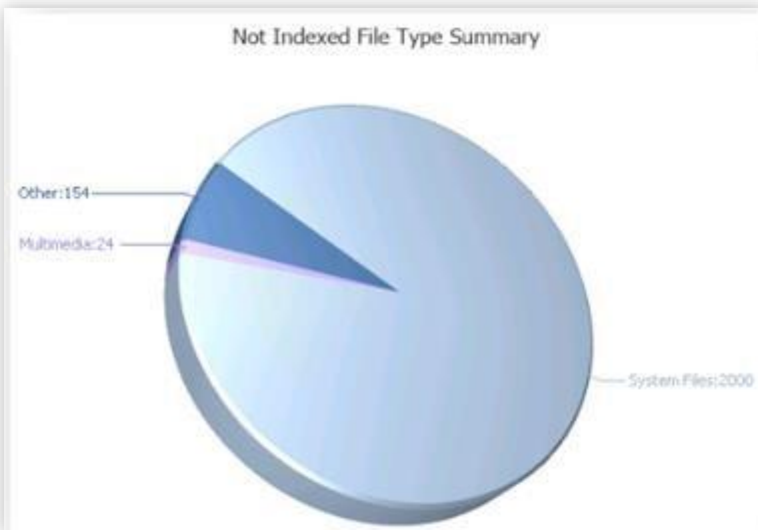
The Pie Charts show the Total File Types in the Non-Processable and Password Protected Files.

Ingestion Not Indexed File Type Summary (Project Level)

Project Name: Enron Demo Project
Report Generated Date: 11/17/2016 8:26:12 PM
Report Created By: Techwriter

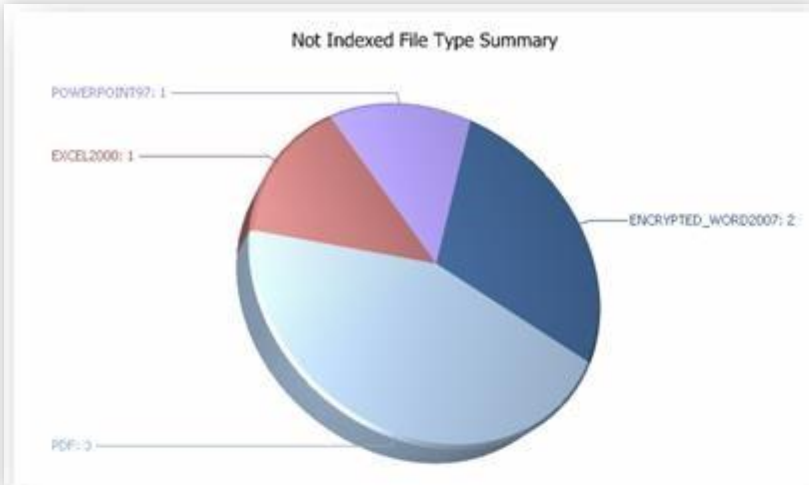
Non Processable Files

File Type	Original File Count	Duplicate File Count	Total File Count	Original File Size	Duplicate File Size	Total File Size
Multimedia	9	15	24	17.41 MB	20.66 MB	38.08 MB
Other	152	2	154	10.16 MB	94.33 KB	10.25 MB
System Files	1,000	1,000	2,000	3.28 MB	3.28 MB	6.56 MB



Password Protected Files

File Type	File Type Description	File Extension	Original File Counts	Duplicate File Counts	Total File Counts	Original File Sizes	Duplicate File Sizes	Total File Sizes
ENCRYPTED_WORD2007	Password Protected Microsoft Word 2007	docx	2	0	2	154 KB	0 Bytes	154 KB
EXCEL2000	Microsoft Excel 2000	xls	1	0	1	237.5 KB	0 Bytes	237.5 KB
PDF	Adobe Acrobat (PDF)	pdf	3	0	3	1.92 MB	0 Bytes	1.92 MB



13.5.7.3.2 Custodian Level

Report is generated on a Custodian Level. You will need to choose the Custodians you wish to view in your report. Check the desired Custodians and click Generate.

The report header will include the Project Name, Report Generated Date, Report Created By and Custodian Selected.

In the Not Indexed File Type Summary report, the following details will be included for each Custodian selected:

- File Type
- File Type Description
- Original File Counts
- Duplicate File Counts
- Total File Counts
- Original File Sizes
- Duplicate File Sizes
- Total File Sizes

The Pie Charts show the Total File Types in the Non-Processable and Password Protected Files.

Ingestion Not Indexed File Type Summary (Custodian Level)

Project Name: Enron Demo Project

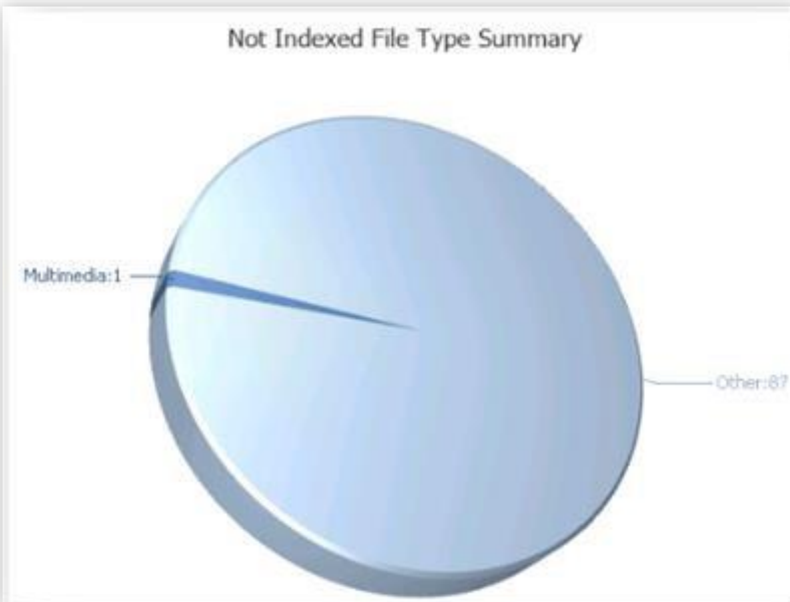
Report Generated Date: 11/17/2016 8:28:23 PM

Report Created By: Techwriter

Andy Zipper

Non Processable Files

File Type	Original File Counts	Duplicate File Count	Total File Count	Original File Size	Duplicate File Size	Total File Size
Multimedia	1	0	1	6.84 MB	0 Bytes	6.84 MB
Other	85	2	87	7.16 MB	94.33 KB	7.25 MB



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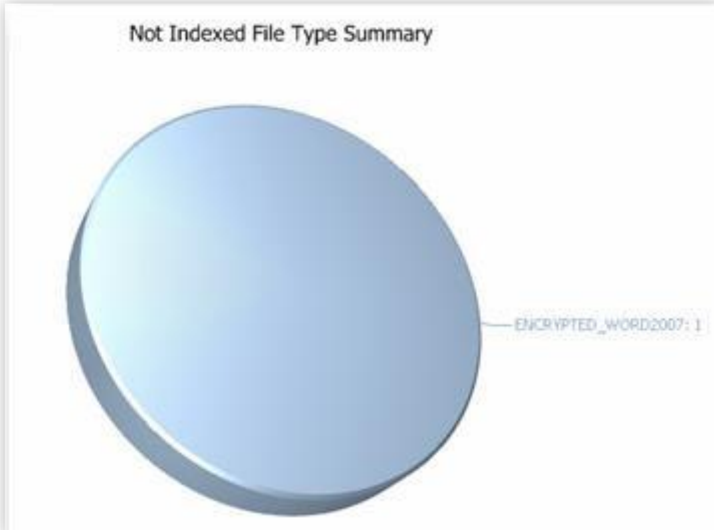
Password Protected Files

File Type	File Type Description	File Extension	Original File Counts	Duplicate File Counts	Total File Counts	Original File Sizes	Duplicate File Sizes	Total File Sizes
ENCRYPTED_WORD2007	Password Protected Microsoft Word 2007	docx	1	0	1	136 KB	0 Bytes	136 KB



13.5.7.4 FullText Replacement Reports

To generate a FullText Replacement report, go to Report > Admin Reports > Misc > FullText Replacement Report.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the FullText Replacement report, the following details will be included:

- FileID: File ID whose fulltext has been replaced.
- File Name: File Name whose fulltext has been replaced.
- Source FullText File: Original location of the Fulltext source file.
- Replaced FullText Location: Replaced location of the Fulltext source file.
- Replaced By: User who replaced the Fulltext.
- Replaced Date: Date and time when the Fulltext was replaced.

NOTE: If no FullText was replaced, a No documents to report message will be displayed.

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Fulltext Replacement Report

Project Name : Prajeena_test_viewer

Report Generated Date: 6/29/2011 12:04:42 PM

Report Created By: aarjya

File ID	File Name	Source FullText File	Replaced FullText Location	Replaced By	Replaced Date
32	Our Earth.pdf	D:\txtx\Batch_Media.txt	\\100.100.100.222\venio\Prajeena_test_viewer\FullTextFiles\2776\1\1\32\0000000000032.txt	prajina.s	6/29/2011 11:26:10 AM
33	Concordance%2020 07-Getting%20Started%20Guide_LLG000 82-0%2008%2007.pdf	D:\txtx\batch_22.txt	\\100.100.100.222\venio\Prajeena_test_viewer\FullTextFiles\2776\1\1\33\0000000000033.txt	prajina.s	6/29/2011 11:26:12 AM
33	Concordance%2020 07-Getting%20Started%20Guide_LLG000 82-0%2008%2007.pdf	D:\txtx\batch_22.txt	\\100.100.100.222\venio\Prajeena_test_viewer\FullTextFiles\2776\1\1\33\0000000000033.txt	prajina.s	6/29/2011 11:45:36 AM

File ID	File Name	Source FullText File	Replaced FullText Location	Replaced By	Replaced Date
127	setup.bmp	D:\txtx\simple_char.txt	\\100.100.100.222\venio\Prajeena_test_viewer\FullTextFiles\2776\3\3\27\0000000000127.txt	prajina.s	6/29/2011 11:45:39 AM
127	setup.bmp	D:\txtx\simple_char.txt	\\100.100.100.222\venio\Prajeena_test_viewer\FullTextFiles\2776\3\3\27\0000000000127.txt	prajina.s	6/29/2011 11:23:52 AM
127	setup.bmp	D:\txtx\simple_char.txt	\\100.100.100.222\venio\Prajeena_test_viewer\FullTextFiles\2776\3\3\27\0000000000127.txt	prajina.s	6/29/2011 11:26:12 AM

13.5.8 Review Reports

The Review reports give you information pertaining to the document reviews in your project.

13.5.8.1 Review Set Report

To generate a Review Set report, go to Report > Admin Reports > Review > Review Set Report.

Select the Review Set you wish to generate the report for and click Generate.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Review Settings report, the following details will be included:

- Prefix and Numbering: Format to be used for naming review documents.
- Source Documents: Files to be included from parent/child documents and email threads.
- Duplicate Options: Settings for handling duplicate documents.
- Tag Propagation Options: Settings for propagating tags in duplicate, parent/child and email thread documents.
- Review Tag Name: Tag to be used for tracking the review set.
- Review Group: Users that will have access to the review set.
- Auto Collection Settings: Settings for auto-collection of new documents.
- Selected Fields to Display: Fields that will be displayed during the review.

Review Set Settings - Overtime Review Report

Project Name :	Enron Demo Project
Report Generated Date :	11/17/2016 8:34:21 PM
Report Created By :	Techwriter

	Batch Prefix	OT
	Batch Size	100
	Batch Start Number	1
	Batch Padding Length	8
	Purpose	
Source		BY TAG (Responsive OR Non-Responsive OR Privileged OR Confidential OR VAR Profile 1_PredictedBelowThreshold OR Manual_VAR Profile 1_VAR Profile 1 OR Manual_VAR Profile 1_VAR Profile 2 OR Auto_VAR Profile 1_VAR Profile 1 OR Auto_VAR Profile 1_VAR Profile 2)
	Keep Parent Child Together	Yes
	Include Email Thread	No
	Exclude Documents Already in Reviewset	No
Tag Propagation Rule		Do not propagate tags to duplicates
	Propagate to Parent/Child	No
	Propagate to Email Thread	No

13.5.8.2 Tag History Detail Report

To generate a Tag History Detail report, go to Report > Admin Reports > Review > Tag History Detail Report.

Select the Review Set, Reviewer, Batch and Tag you wish to generate the report for.

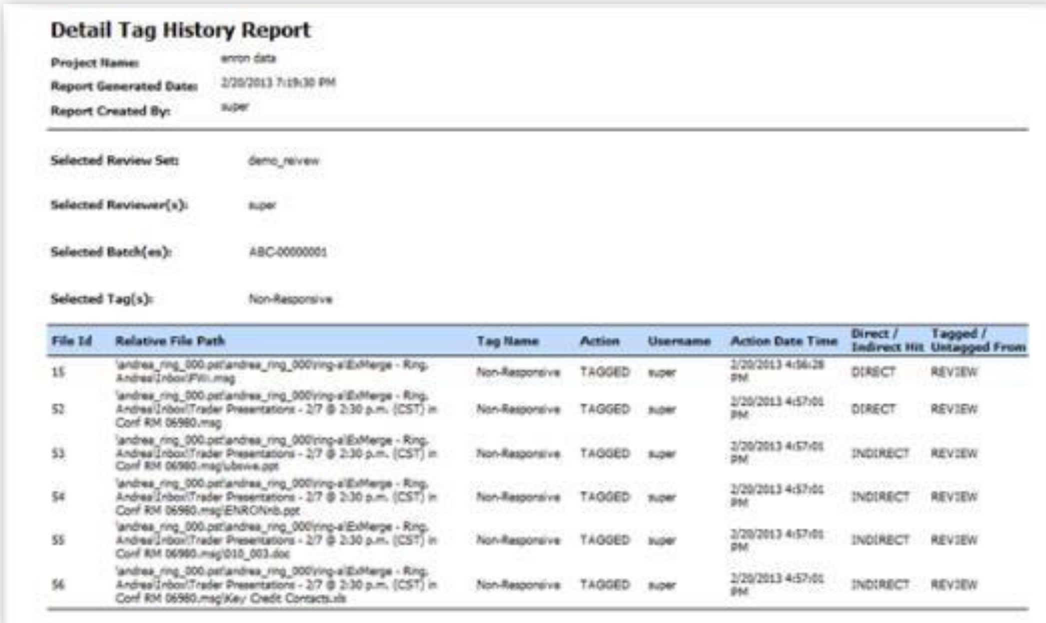
If no batches are checked out or reviewed in the project, you will see No data to display in the drop-down menu.

After you select the Review Set, information for the subsequent fields will be populated. This will only happen if there are batches checked out and documents have been tagged in the review. Use the drop-down menu to choose a different option. Click Generate to create the report.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Review Settings report, the following details will be included:

- File ID: System generated file identifier.
- Relative File Path: Relative path to original file.
- Tag Name: Tag used.
- Action: Action taken for tag. The available options are Tagged or Untagged.
- Username: User that tagged/untagged the document.
- Action Date Time: Date and time document was tagged/untagged.
- Direct/Indirect Hit: Identifies whether the document tagged was a direct or indirect hit.
- Tagged/Untagged From:Module where tag/untag took place. Could be Search or Review.



Detail Tag History Report

Project Name: enron data
Report Generated Date: 2/20/2013 7:19:30 PM
Report Created By: super

Selected Review Set: demo_reivew
Selected Reviewer(s): super
Selected Batch(es): ABC-0000001
Selected Tag(s): Non-Responsive

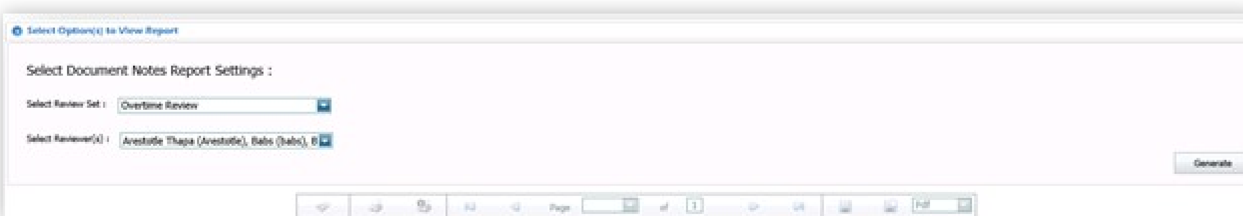
File Id	Relative File Path	Tag Name	Action	Username	Action Date Time	Direct / Indirect Hit	Tagged / Untagged From
15	\andrea_ring_000.pst\andrea_ring_000\ring-a\ExMerge - Ring, Andrea\Inbox\FW\.msg	Non-Responsive	TAGGED	super	2/20/2013 4:56:28 PM	DIRECT	REVIEW
52	\andrea_ring_000.pst\andrea_ring_000\ring-a\ExMerge - Ring, Andrea\Inbox\Trader Presentations - 2/7 @ 2:30 p.m. (CST) in Conf RM 06980.msg	Non-Responsive	TAGGED	super	2/20/2013 4:57:01 PM	DIRECT	REVIEW
53	\andrea_ring_000.pst\andrea_ring_000\ring-a\ExMerge - Ring, Andrea\Inbox\Trader Presentations - 2/7 @ 2:30 p.m. (CST) in Conf RM 06980.msg\ubswe.ppt	Non-Responsive	TAGGED	super	2/20/2013 4:57:01 PM	INDIRECT	REVIEW
54	\andrea_ring_000.pst\andrea_ring_000\ring-a\ExMerge - Ring, Andrea\Inbox\Trader Presentations - 2/7 @ 2:30 p.m. (CST) in Conf RM 06980.msg\ENRONnb.ppt	Non-Responsive	TAGGED	super	2/20/2013 4:57:01 PM	INDIRECT	REVIEW
55	\andrea_ring_000.pst\andrea_ring_000\ring-a\ExMerge - Ring, Andrea\Inbox\Trader Presentations - 2/7 @ 2:30 p.m. (CST) in Conf RM 06980.msg\010_003.doc	Non-Responsive	TAGGED	super	2/20/2013 4:57:01 PM	INDIRECT	REVIEW
56	\andrea_ring_000.pst\andrea_ring_000\ring-a\ExMerge - Ring, Andrea\Inbox\Trader Presentations - 2/7 @ 2:30 p.m. (CST) in Conf RM 06980.msg\Key Credit Contacts.xls	Non-Responsive	TAGGED	super	2/20/2013 4:57:01 PM	INDIRECT	REVIEW

NOTE: If no tags were applied in the review, a message will appear to let you know when you click the Generate button.

13.5.8.3 Document Notes Report

To generate a Document Notes report, go to Report > Admin Reports > Review > Document Notes Report.

Select the Review Set, Reviewer, and Reviewer you wish to generate the report for. If no document notes are in the project, you will see No data to display in the drop-down menu.

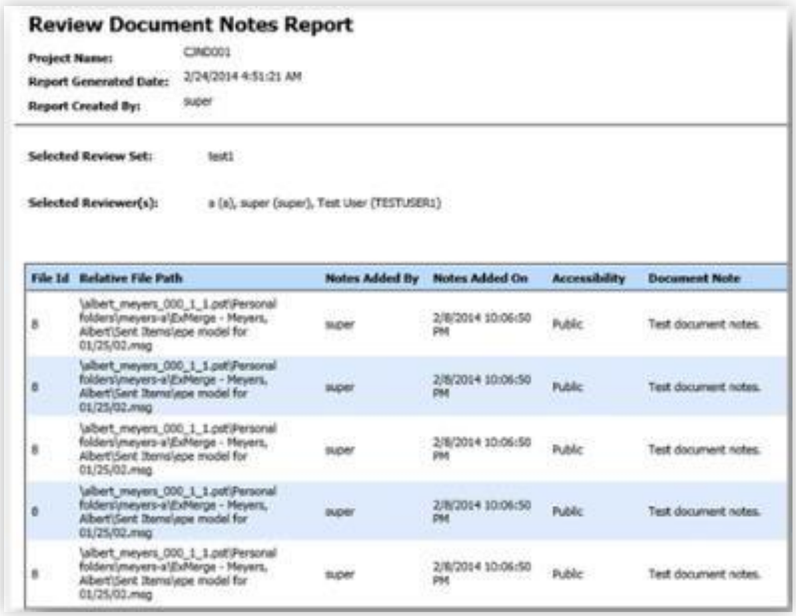


After you select the Review Set, information for the Reviewers will be populated. Use the dropdown menu to choose a different option. Click Generate to create the report.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the Document Notes report, the following details will be included:

- File ID: System generated file identifier.
- Relative File Path: Relative path to original file.
- Notes Added By: User that applied the document note.
- Notes Added On: Date and time the document note was applied.
- Accessibility: Indicates whether the document note is public or private.
- Document Note: Document note applied to the document.



Review Document Notes Report

Project Name: CIND001
Report Generated Date: 2/24/2014 4:51:21 AM
Report Created By: super

Selected Review Set: test1

Selected Reviewer(s): a (a), super (super), Test User (TESTUSER1)

File Id	Relative File Path	Notes Added By	Notes Added On	Accessibility	Document Note
8	\albert_meyers_000_1_1.pst\Personal folders\meyers-a\ExMerge - Meyers, Albert\Sent Items\epe model for 01/25/02.msg	super	2/8/2014 10:06:50 PM	Public	Test document notes.
8	\albert_meyers_000_1_1.pst\Personal folders\meyers-a\ExMerge - Meyers, Albert\Sent Items\epe model for 01/25/02.msg	super	2/8/2014 10:06:50 PM	Public	Test document notes.
8	\albert_meyers_000_1_1.pst\Personal folders\meyers-a\ExMerge - Meyers, Albert\Sent Items\epe model for 01/25/02.msg	super	2/8/2014 10:06:50 PM	Public	Test document notes.
8	\albert_meyers_000_1_1.pst\Personal folders\meyers-a\ExMerge - Meyers, Albert\Sent Items\epe model for 01/25/02.msg	super	2/8/2014 10:06:50 PM	Public	Test document notes.
8	\albert_meyers_000_1_1.pst\Personal folders\meyers-a\ExMerge - Meyers, Albert\Sent Items\epe model for 01/25/02.msg	super	2/8/2014 10:06:50 PM	Public	Test document notes.

NOTE: If no document notes were applied in the review, a message will appear to let you know when you click the Generate button.

13.5.8.4 Tag/Tag Comment Detail Report

To generate a Tag/Tag Comment Detail report, go to Report > Admin Reports > Review > Tag/Tag Comment Detail Report.

Select the Review Set, Reviewer(s) and Tag(s) you wish to generate the report for. If no batches are checked out or reviewed in the project, you will see No data to display in the drop-down menu.

After you select the Review Set, information for the subsequent fields will be populated. This will only happen if there are batches checked out and documents have been reviewed. Use the drop-down menu to choose a different option. Click Generate to create the report.

NOTE: By default, all the tags that have a document associated will be selected. Use the dropdown menu to check/uncheck the tagged documents you want to report as Privileged.
NOTE: If no document tags were applied in the review, a message will appear to let you know when you click the Generate button.

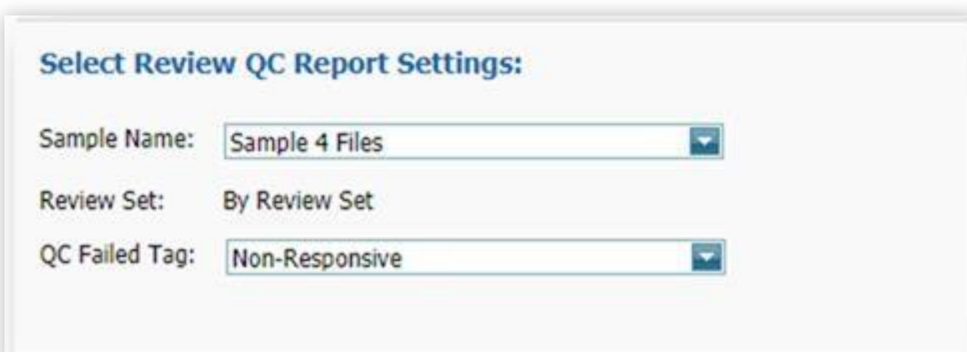
13.5.8.5 Review QC Report

To generate a Review QC Report, navigate to Report > Admin Reports > Review > Review QC report

Select the Sampling Name to load. Review Set will be listed for selected Sampling.

Select QC Failed Tag.

NOTE: You will not be able to select a Sampling Name If there is not a sampling with a QC Fail Tag available in the project.



13.5.9 No-Text Reports

The No-Text reports give you information about the documents without text in your project.

13.5.9.1 No-Text Summary Report

To generate a No-Text Summary Report report go to Report > Admin Reports > No-Text Report > No-Text Summary.

You can select between File Type Group and File Extension Group to view the report.

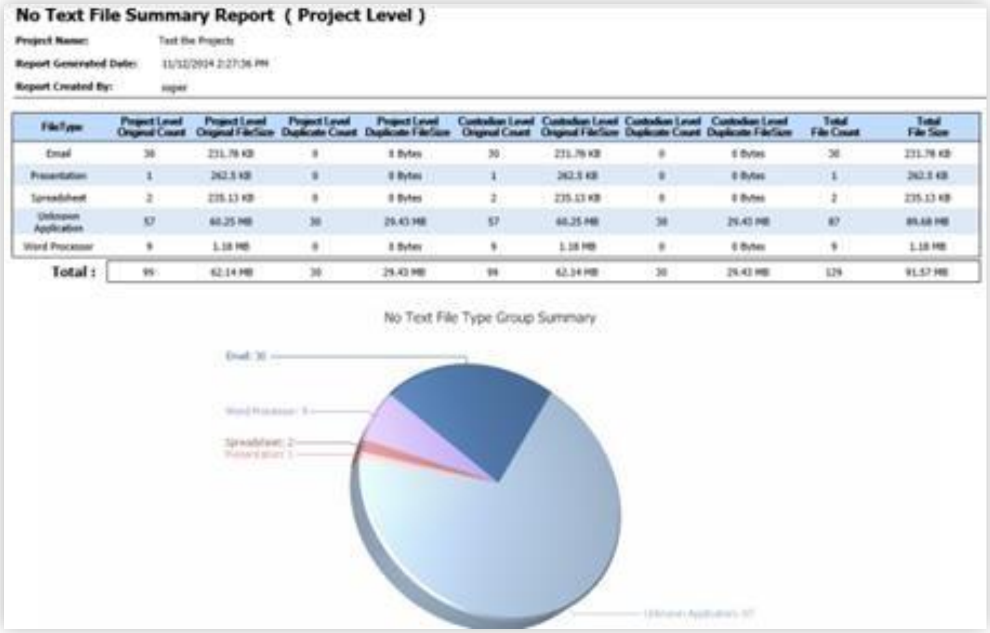
13.5.9.1.1 Project Level

Report is generated on the Project Level

The report header will include the Project Name, Report Generated Date and Report Created By.

In the No-Text File Summary report, the following details will be included:

- File Type/File Extension (Depending on the selection the user makes)
- Project Level Original Count
- Project Level Original FileSize
- Project Level Duplicate Count
- Project Level Duplicate FileSize
- Custodian Level Original Count
- Custodian Level Original FileSize
- Custodian Level Duplicate Count
- Custodian Level Duplicate FileSize
- Total File Count
- Total File Size



No Text File Summary Report (Project Level)

Project Name: Test the Projects

Report Generated Date: 11/12/2014 2:27:36 PM

Report Created By: super

FileType	Project Level Original Count	Project Level Original FileSize	Project Level Duplicate Count	Project Level Duplicate FileSize	Custodian Level Original Count	Custodian Level Original FileSize	Custodian Level Duplicate Count	Custodian Level Duplicate FileSize	Total File Count	Total File Size
Email	30	231.78 KB	0	0 Bytes	30	231.78 KB	0	0 Bytes	30	231.78 KB
Presentation	1	262.5 KB	0	0 Bytes	1	262.5 KB	0	0 Bytes	1	262.5 KB
Spreadsheet	2	235.13 KB	0	0 Bytes	2	235.13 KB	0	0 Bytes	2	235.13 KB
Unknown Application	57	60.25 MB	30	29.43 MB	57	60.25 MB	30	29.43 MB	87	89.68 MB
Word Processor	9	1.18 MB	0	0 Bytes	9	1.18 MB	0	0 Bytes	9	1.18 MB
Total :	99	62.14 MB	30	29.43 MB	99	62.14 MB	30	29.43 MB	129	91.57 MB

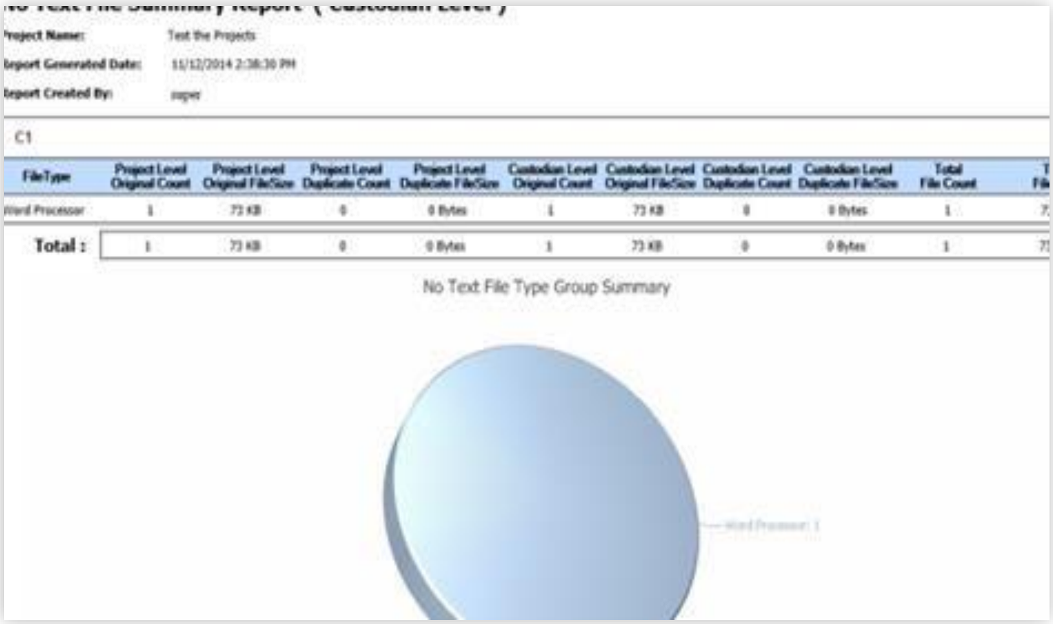
13.5.9.1.2 Custodian Level

Report is generated on a Custodian Level. You will need to choose the Custodians you wish to view in your report. Check the desired Custodians and click Generate.

The report header will include the Project Name, Report Generated Date, Report Created By and Custodian Selected.

In the No-Text File Summary report, the following details will be included for each Custodian selected:

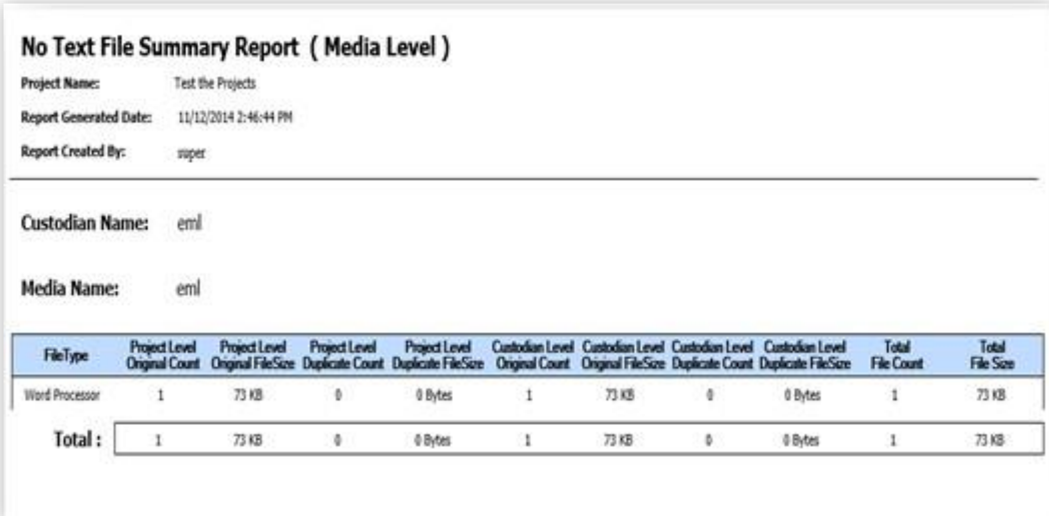
- File Type/File Extension (Depending on the selection the user makes)
- Project Level Original Count
- Project Level Original FileSize
- Project Level Duplicate Count
- Project Level Duplicate FileSize
- Custodian Level Original Count
- Custodian Level Original FileSize
- Custodian Level Duplicate Count
- Custodian Level Duplicate FileSize
- Total File Count
- Total File Size



13.5.9.1.3 Media Level

Report is generated on a Media Level. You will need to choose the Media you wish to view in your report. Check the desired Media and click Generate.

The report header will include the Project Name, Report Generated Date, Report Created By, Custodian and Media Selected.



No Text File Summary Report (Media Level)

Project Name: Test the Projects

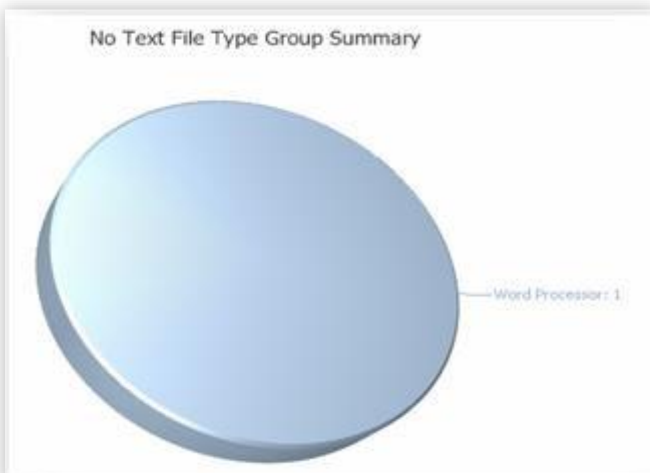
Report Generated Date: 11/12/2014 2:46:44 PM

Report Created By: super

Custodian Name: eml

Media Name: eml

FileType	Project Level Original Count	Project Level Original FileSize	Project Level Duplicate Count	Project Level Duplicate FileSize	Custodian Level Original Count	Custodian Level Original FileSize	Custodian Level Duplicate Count	Custodian Level Duplicate FileSize	Total File Count	Total File Size
Word Processor	1	73 KB	0	0 Bytes	1	73 KB	0	0 Bytes	1	73 KB
Total :	1	73 KB	0	0 Bytes	1	73 KB	0	0 Bytes	1	73 KB



13.5.9.1.4 Project Level Detail Report

To generate a No-Text Report, go to Report > Admin Reports > No-Text Report > Project Level.

The report header will include the Project Name, Report Generated Date and Report Created By.

In the No-Text File Detail report, the following details will be included:

- File ID
- File Name
- File Extension
- File Path

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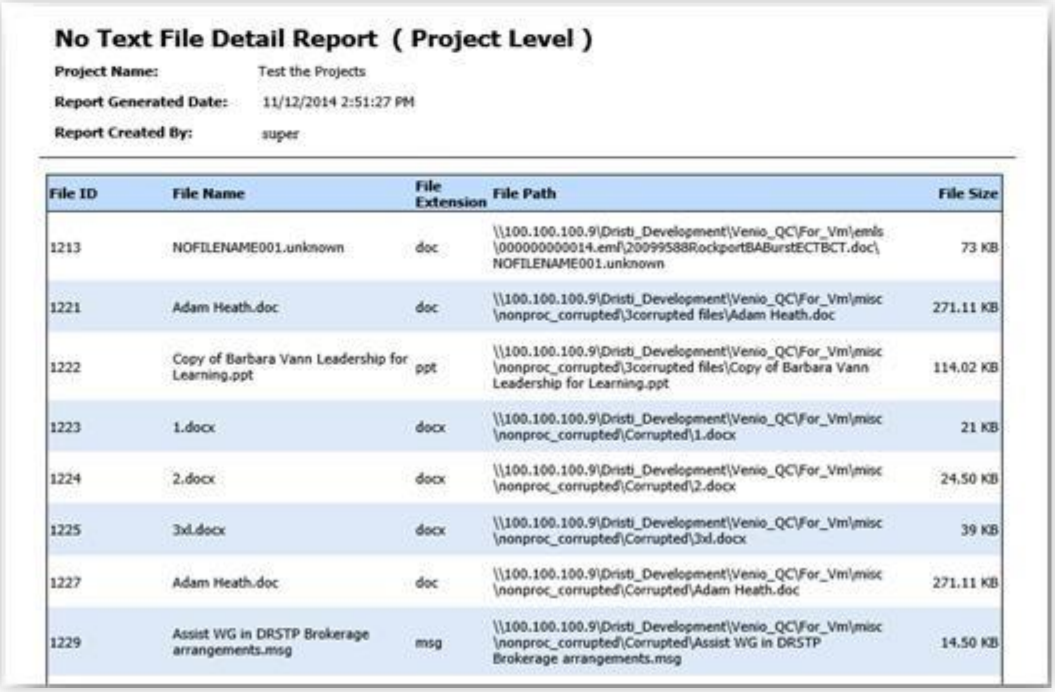
- File Size



No Text File Detail Report (Project Level)

Project Name: Test the Projects

Report Generated Date: 11/12/2014 2:51:27 PM

Report Created By: super

File ID	File Name	File Extension	File Path	File Size
1213	NOFILENAME001.unknown	doc	\\100.100.100.9\Dristi_Development\Venio_QC\For_Vm\emls\00000000014.eml\20099588RockportBABurstECTBCT.doc\NOFILENAME001.unknown	73 KB
1221	Adam Heath.doc	doc	\\100.100.100.9\Dristi_Development\Venio_QC\For_Vm\misc\nonproc_corrupted\3corrupted files\Adam Heath.doc	271.11 KB
1222	Copy of Barbara Vann Leadership for Learning.ppt	ppt	\\100.100.100.9\Dristi_Development\Venio_QC\For_Vm\misc\nonproc_corrupted\3corrupted files\Copy of Barbara Vann Leadership for Learning.ppt	114.02 KB
1223	1.docx	docx	\\100.100.100.9\Dristi_Development\Venio_QC\For_Vm\misc\nonproc_corrupted\Corrupted\1.docx	21 KB
1224	2.docx	docx	\\100.100.100.9\Dristi_Development\Venio_QC\For_Vm\misc\nonproc_corrupted\Corrupted\2.docx	24.50 KB
1225	3xl.docx	docx	\\100.100.100.9\Dristi_Development\Venio_QC\For_Vm\misc\nonproc_corrupted\Corrupted\3xl.docx	39 KB
1227	Adam Heath.doc	doc	\\100.100.100.9\Dristi_Development\Venio_QC\For_Vm\misc\nonproc_corrupted\Corrupted\Adam Heath.doc	271.11 KB
1229	Assist WG in DRSTP Brokerage arrangements.msg	msg	\\100.100.100.9\Dristi_Development\Venio_QC\For_Vm\misc\nonproc_corrupted\Corrupted\Assist WG in DRSTP Brokerage arrangements.msg	14.50 KB

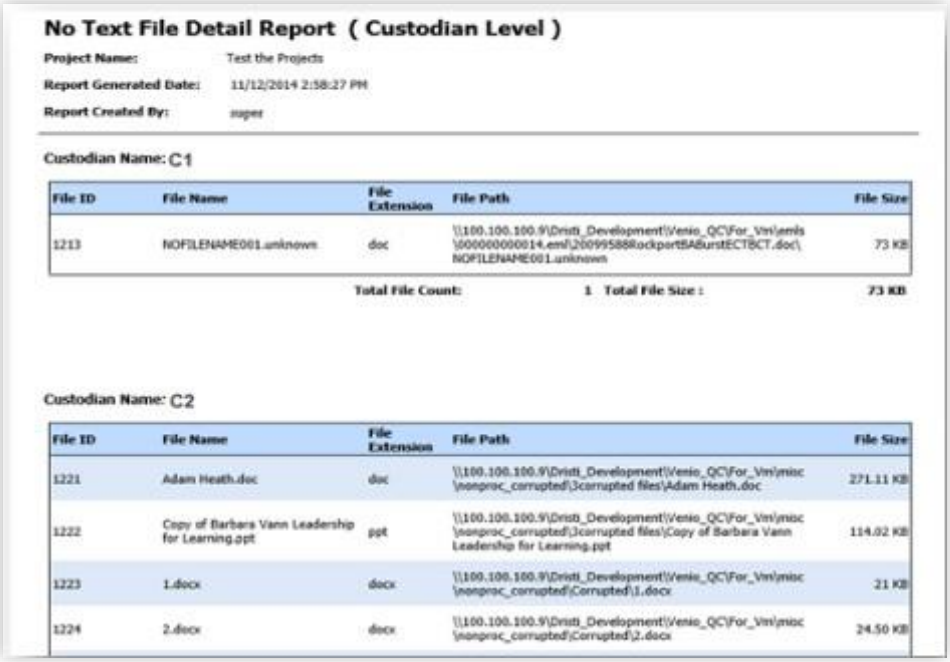
13.5.9.2 Custodian Level Detail Report

To generate a No-Text Report, go to Report > Admin Reports > No-Text Report > Custodian Level.

The report header will include the Project Name, Report Generated Date, Report Created By and Custodian Selected.

In the No-Text File Detail report, the following details will be included:

- File ID
- File Name
- File Extension
- File Path
- File Size



No Text File Detail Report (Custodian Level)

Project Name: Test the Projects

Report Generated Date: 11/12/2014 2:58:27 PM

Report Created By: super

Custodian Name: C1

File ID	File Name	File Extension	File Path	File Size
1213	NOFILENAME001.unknown	doc	\\100.100.100.9\Dristi_Development\Venio_QC\For_Vm\emls\000000000014.eml\20099588RockportBABurstECTBCT.doc\NOFILENAME001.unknown	73 KB
		Total File Count:	1 Total File Size :	73 KB

Custodian Name: C2

File ID	File Name	File Extension	File Path	File Size
1221	Adam Heath.doc	doc	\\100.100.100.9\Dristi_Development\Venio_QC\For_Vm\misc\nonproc_corrupted\3corrupted files\Adam Heath.doc	271.11 KB
1222	Copy of Barbara Vann Leadership for Learning.ppt	ppt	\\100.100.100.9\Dristi_Development\Venio_QC\For_Vm\misc\nonproc_corrupted\3corrupted files\Copy of Barbara Vann Leadership for Learning.ppt	114.02 KB
1223	1.docx	docx	\\100.100.100.9\Dristi_Development\Venio_QC\For_Vm\misc\nonproc_corrupted\Corrupted\1.docx	21 KB
1224	2.docx	docx	\\100.100.100.9\Dristi_Development\Venio_QC\For_Vm\misc\nonproc_corrupted\Corrupted\2.docx	24.50 KB

13.5.9.3 Media Level Detail Report

To generate a No-Text Report, go to Report > Admin Reports > No-Text Report > Media Level.

The report header will include the Project Name, Report Generated Date, Report Created By, Custodian and Media Selected.

In the No-Text File Detail report, the following details will be included:

- File ID
- File Name
- File Extension
- File Path
- File Size

No Text File Detail Report (Media Level)

Project Name: Test the Projects

Report Generated Date: 11/12/2014 3:02:12 PM

Report Created By: super

Custodian Name: C1

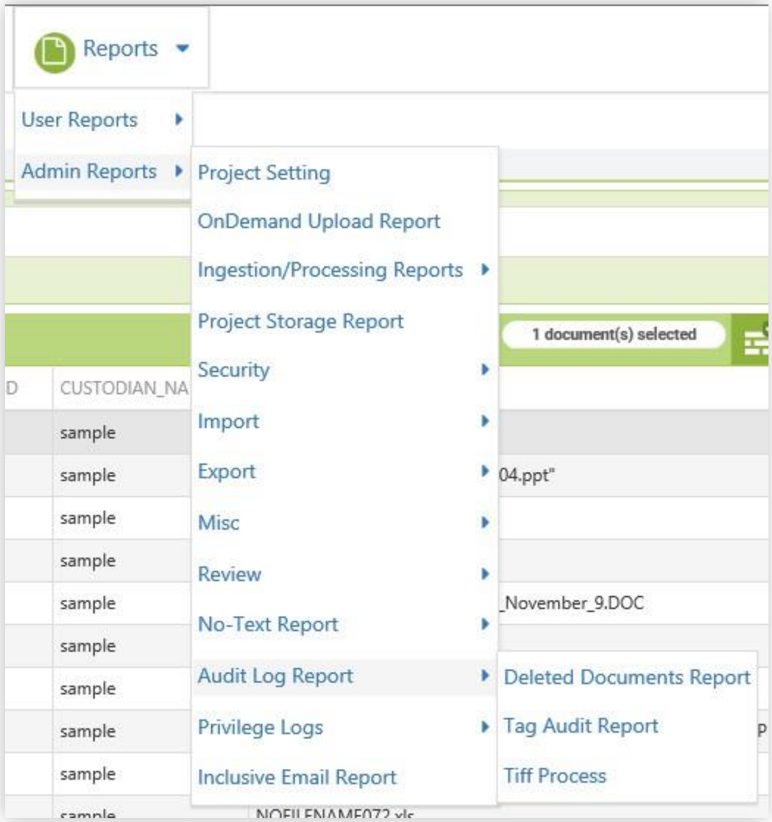
Media Name: eml

File ID	File Name	File Extension	File Path	File Size
1213	NOFILENAME001.unknown	doc	\\100.100.100.9\Dristi_Development\Venio_QC\For_Vm\emls \000000000014.eml\20099588RockportBABurstECTBCT.doc\ NOFILENAME001.unknown	73 KB
		Total File Count:	**1** **Total File Size :**	**73 KB**

13.5.10 Audit Log Reports

The available Audit Log reports are;

- Deleted Documents Report
- Tag Audit Report
- Tiff Processing Report



13.5.11 Privilege Logs

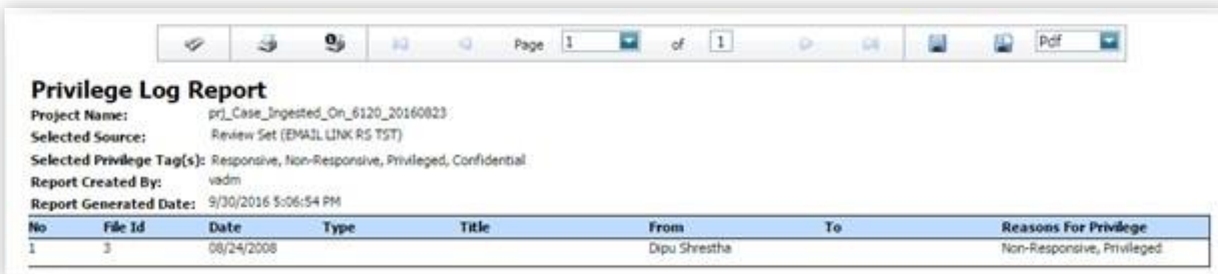
13.5.11.1 Privilege Log Report

To generate a Privilege Report, go to Report > Admin Reports > Privilege Logs > Privilege Report and select the options for your report.

The privilege report can be generated from three sources.

- Whole Project
- Selected Review Set
- Selected Export

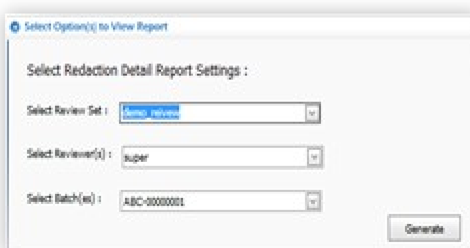
First, select a Source. Then, choose the source Tag(s) and Tag(s) to Display from the drop-down lists. Click Generate to generate the report.



13.5.11.2 Redaction Report

To generate a Redaction Report, go to Report > Admin Reports > Privilege Logs > Redaction Report and select the options for your report.

Select a Review Set. After you select the Review Set, information for the subsequent fields will be populated. This will only happen if there are batches checked out and documents have been reviewed. Use the drop-down menus to select the Reviewer(s) and Batch(es). Click Generate to create the report.



The report header will include the Project Name, Report Generated Date and Report Created By.

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Detail Redaction Report

Project Name: Test export delete
Report Generated Date: 8/22/2017 3:26:43 PM
Report Created By: super

Selected Review Set: Work

Selected Reviewer(s): Bip (r), project (p), super (super), user (u)

File Id	Relative File Path	Username	Annotation Type	Action	Page Number	Action Date Time
6	\chris_stokley_000_1_1.pst\Personal folders\stokley-c\Stokley, Chris (Non-Privileged)\Chris Stokley\Volume Mang\Re: Houston meeting.msg	super	Hidden	added	1	8/22/2017 3:25:27 PM
8	\chris_stokley_000_1_1.pst\Personal folders\stokley-c\Stokley, Chris (Non-Privileged)\Chris Stokley\Volume Mang\EPMIM problem.msg	super	Black Redaction	added	1	8/22/2017 3:26:25 PM
17	\chris_stokley_000_1_1.pst\Personal folders\stokley-c\Stokley, Chris (Non-Privileged)\Chris Stokley\Volume Mang\Chris, please read and advise.msg	super	White Redaction	added	1	8/22/2017 3:26:11 PM

NOTE: If no redactions were applied in the review, the message No documents to report will appear when you click the Generate button.

13.5.12 Inclusive Email Report

To generate a Redaction Report, go to Report > Admin Reports > Inclusive Email Report.

Select the media on which you want to report.

The report header will include the Project Name, Selected Media Name, Report Generated Date and Report Created By.

In the Inclusive Email report, the following details will be included:

- File ID: Assigned File ID of the document which is inclusive email.
- File Name: File name of the inclusive email.
- Inclusive Reason: Reason email was recognized as an inclusive email.

Inclusive Mail Report

Project Name : Test export delete

Selected Media alber

Report Generated Date : 8/22/2017 3:37:42 PM

Report Created By : super

File Id	File Name	Inclusive Reason
2	Wednesday ENPOWER CLEANUP meeting 4-4-01.msg	Leaf Node
3	Wednesday ENPOWER CLEANUP meeting 4-4-01.msg	Leaf Node
4	CDWR DECEMBER PAYMENT.msg	Leaf Node
5	Import Deviation InterchangeID from INT_IMPEXP table.msg	Leaf Node
6	Re: Houston meeting.msg	Leaf Node
7	Scheduling Wheels.msg	Leaf Node
8	EPMIM problem.msg	Leaf Node
9	Optical.msg	Leaf Node
10	PEOPLE FINDER.msg	Leaf Node

14 Legal Hold

The legal hold module allows administrators to select potential custodians and select customized notices for legal hold and track their acknowledgements. This section details the customizations and configurations needed to be able to work on the Legal Hold module.

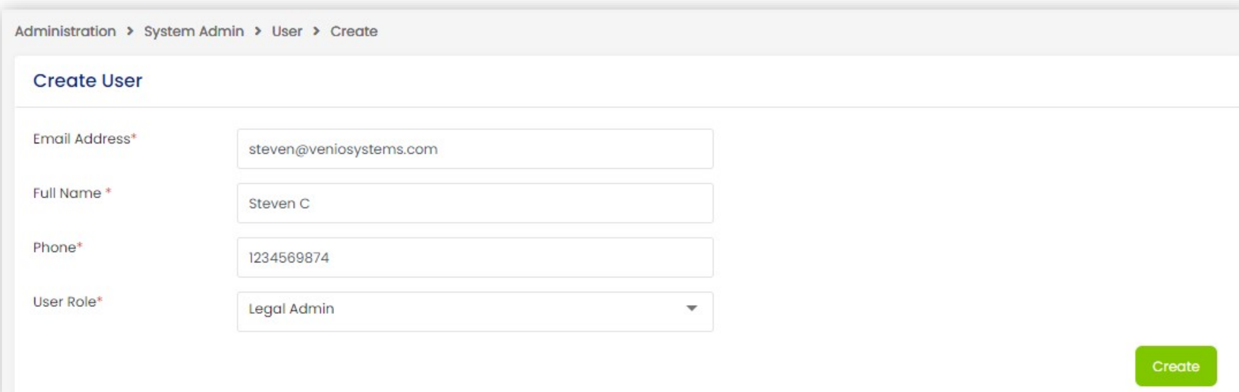
14.1 Configuration Requirements for Legal Hold

To access the Legal Hold Page, the first step is to create a Legal Admin from the Create User Screen.

To create a legal admin, follow the below steps:

1. Navigate to Administration > System Admin > User > Create.

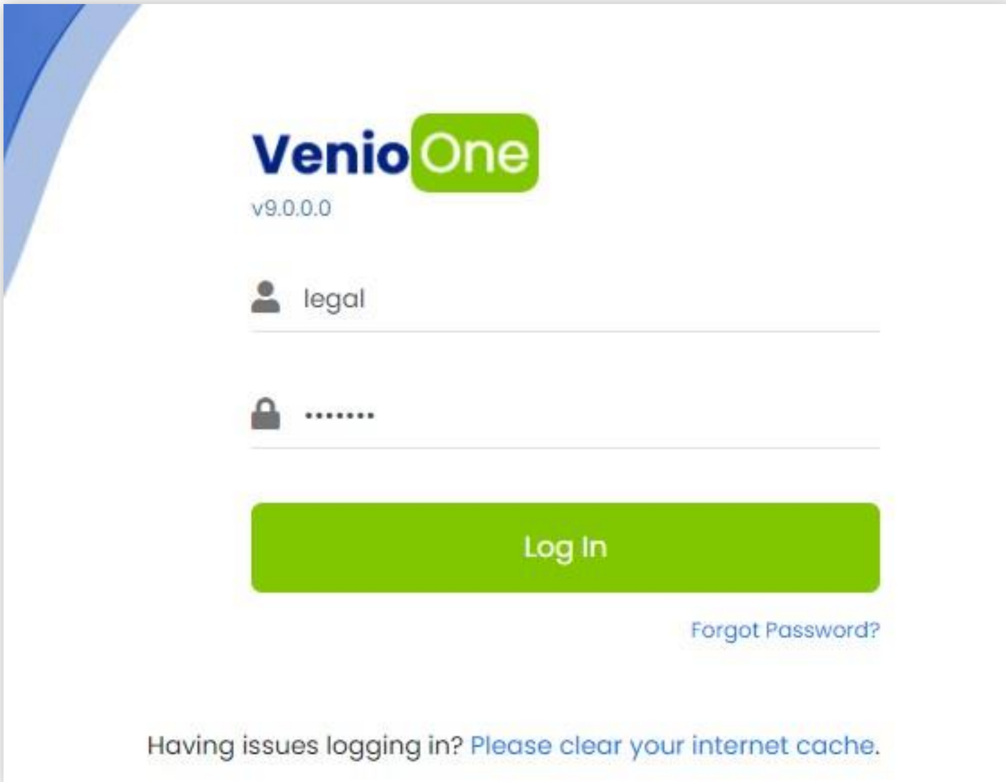
   The Create New User screen appears.



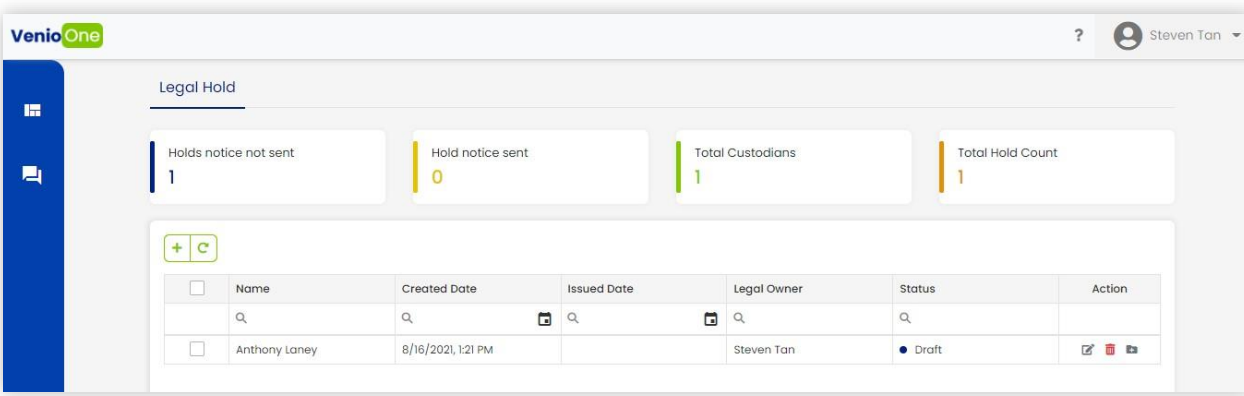
2. Enter the details and click Create.

14.2 Legal Hold Dashboard

Once the Legal Admin account is created, you can login to VOD to access Legal Hold Page.



Upon login, you will be directed to a dashboard, where all the legal holds to the custodian is listed. Dashboard also displays the number of holds notices not sent, hold notice sent, total custodian and the total number of hold counts.



14.3 Creating Notification Template

A Legal Admin can configure notification template from Create Notice Template page. There are four types of notifications that the admin can choose from the Notification Type drop-down menu:

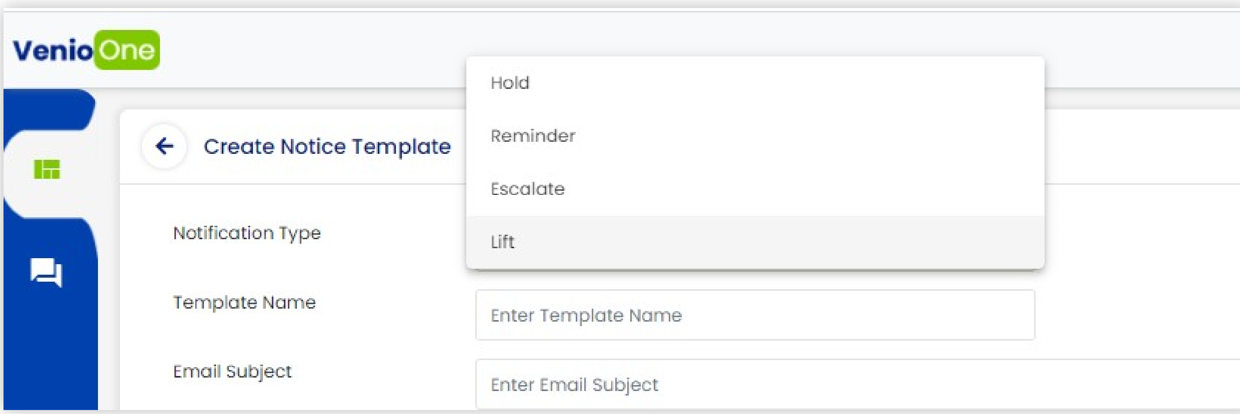
- Holds
- Reminders
- Escalate
- Lift

To create a notification template, follow the below steps:

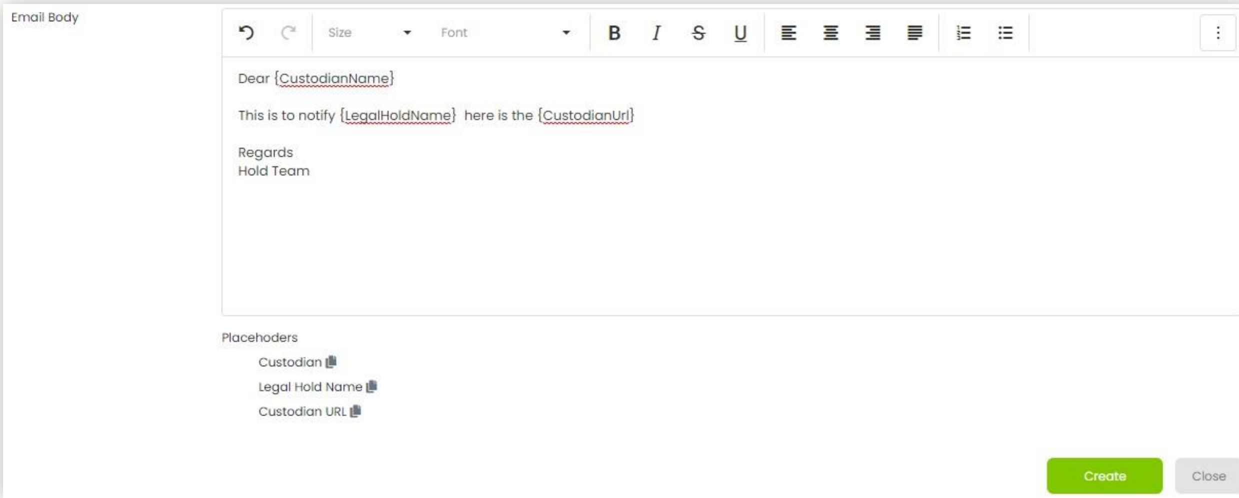
1. From the Legal Hold dashboard, click icon to navigate to Legal Hold Template UI.

   The Create Notice Template appears.

2. Select Notification Type from the drop-down menu:

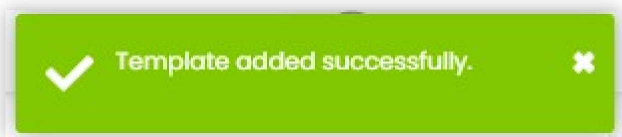


3. Enter Template Name and Email Subject in the available fields.
4. Enter text in the Email Body and click Create.



You may type in generic email and have copy using to the text area to generate generic email.

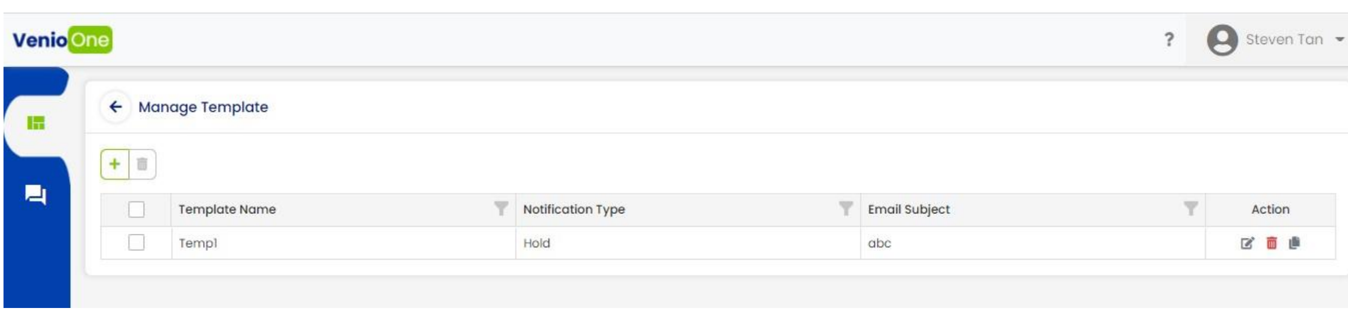
5. Once the template is created, a confirmation message appears.



14.4 Managing Template

Once the template is created, it appears in the Manage Templates page.

From the Manage Template page, you can edit, delete, and clone the Legal Hold Template.

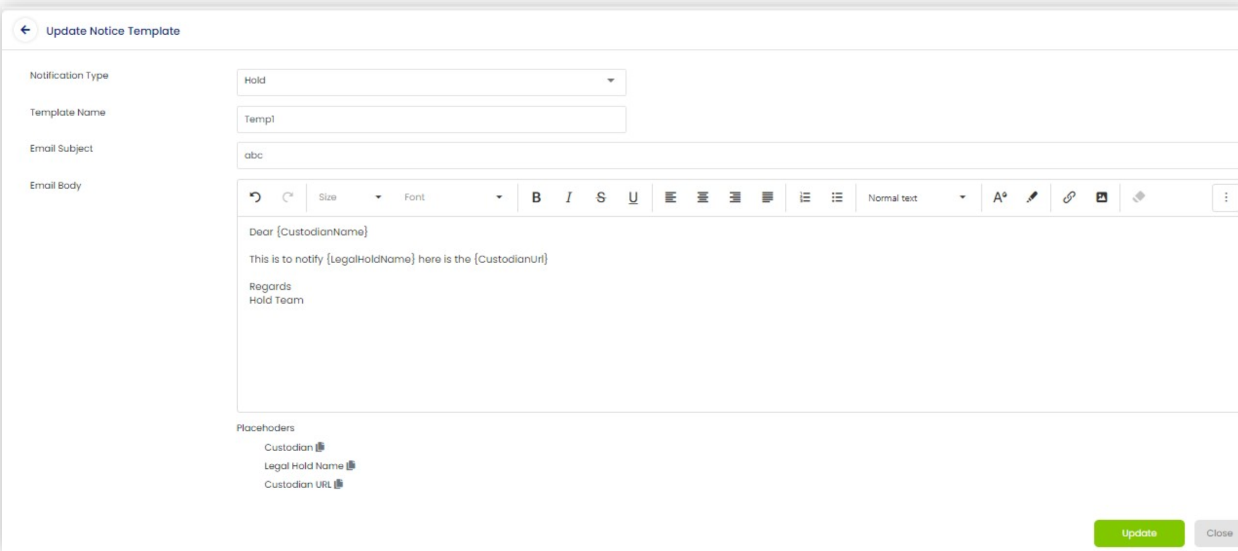


14.4.1 Editing Template

You can edit the template from the Update Notice Template page.

To edit a template, follow the below steps:

1. Navigate to the Manage Template screen and click icon corresponding to the template you wish to edit.



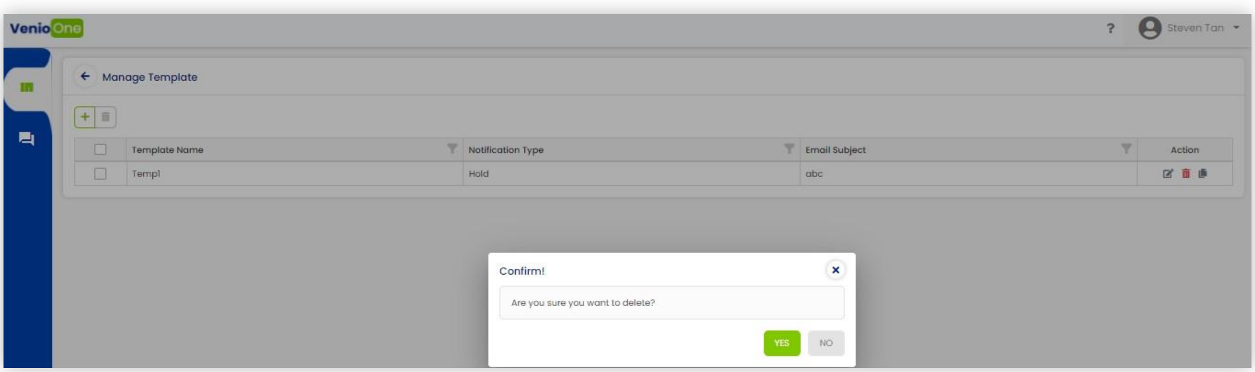
3. Make the desired changes and click Update.

14.4.2 Deleting Template

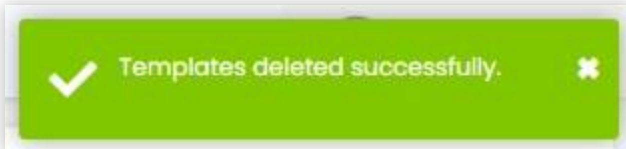
You can delete the template from the Update Notice Template page.

To delete a template, follow the below steps:

1. Navigate to the Manage Template screen and click icon corresponding to the template you wish to delete.
2. A message to confirm if you want to delete the template or not is displayed. Click YES to delete the template. You can click NO if you do not wish to delete.



4. If you click YES, the following confirmation message appears:



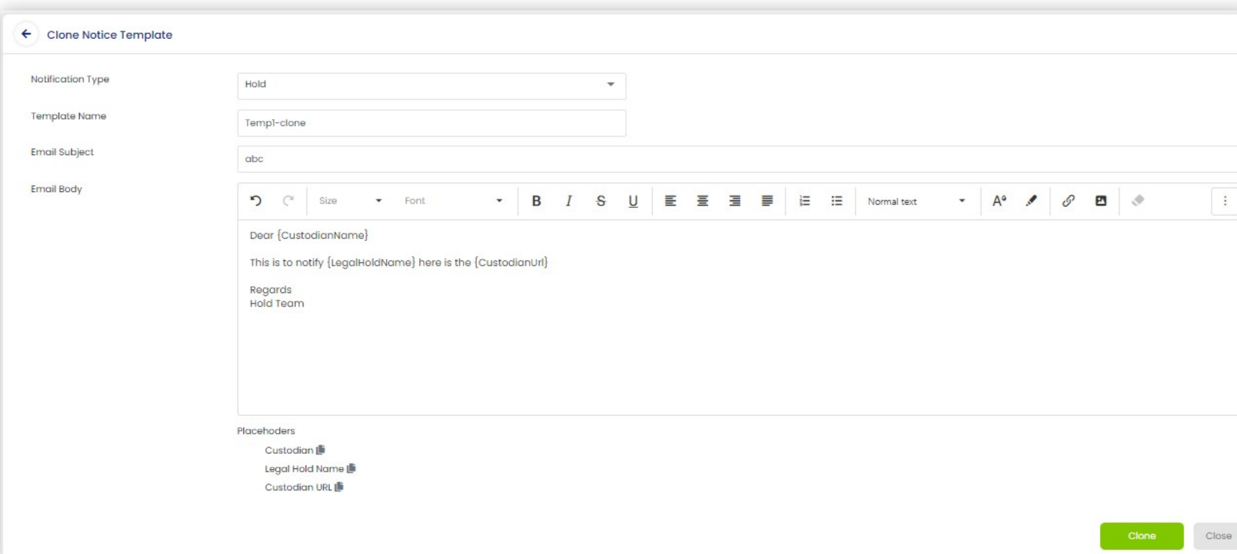
14.4.3 Cloning Template

You can clone the template from the Clone Notice Template page.

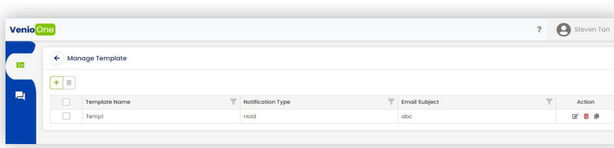
To clone a template, follow the below steps:

1. Navigate to the Manage Template screen and click icon corresponding to the template you wish to clone with.

   The Clone Notice Template screen appears.



2. After viewing/making the desired changes, click Clone.
3. A message confirming the templated was adding successfully appears.

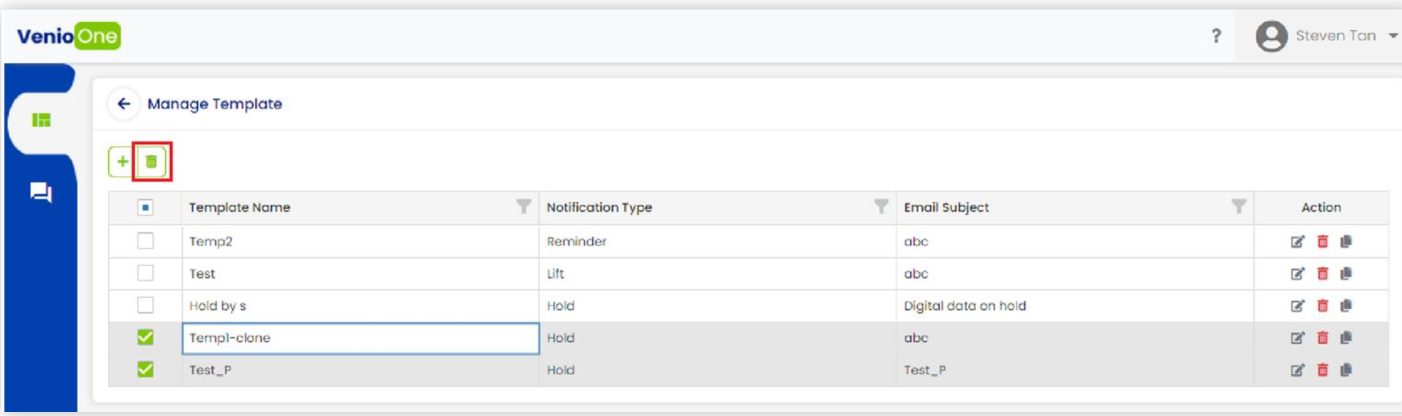


14.4.4 Bulk Delete

You can delete multiple templates together from the Update Notice Template page.

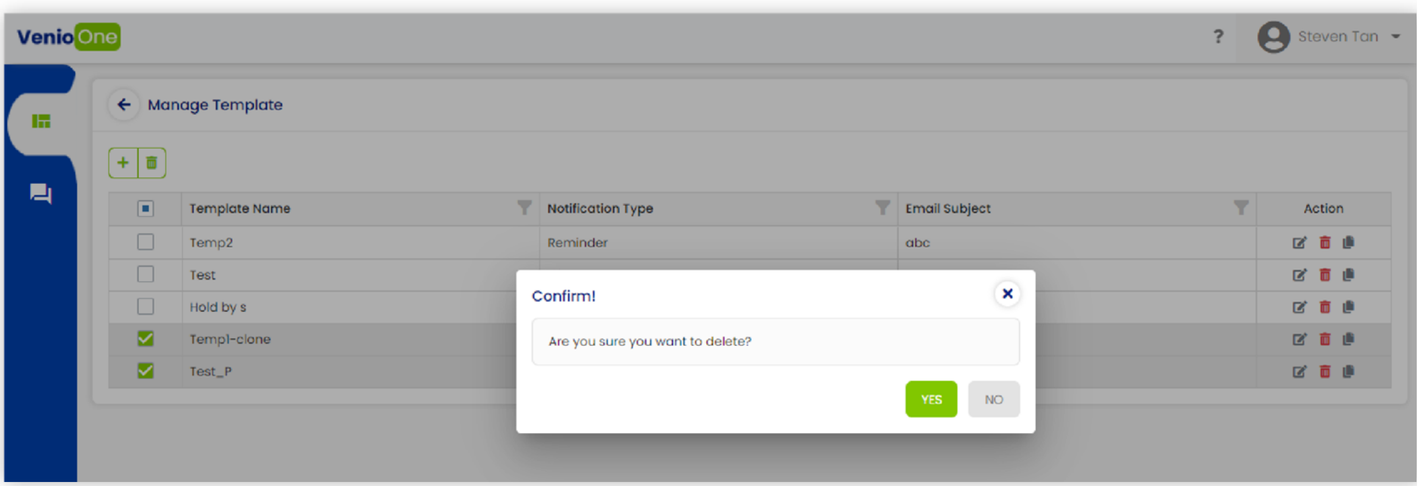
To delete multiple templates, follow the below steps:

1. Navigate to the Manage Template screen and click icon to delete the selected

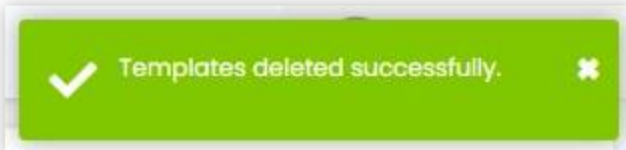


templates.

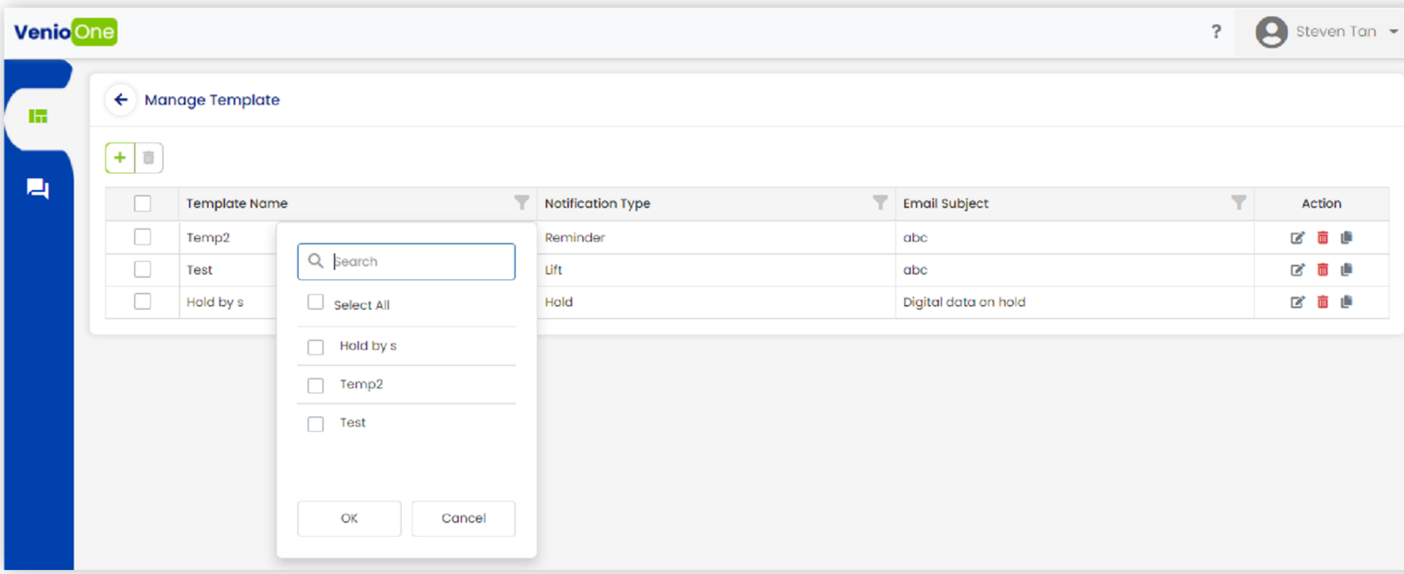
5. A message to confirm if you want to delete the selected templates or not is displayed. Click YES to delete or click NO if you do not wish to delete.



6. If you click YES, the following confirmation message appears:



14.4.5 Filtering Templates



You can use the Filter feature for the templates from the Manage Templates screen.

To Filter, in the Manage Templates list screen, click icon for any of the columns in the templates list. The corresponding filter options appear.

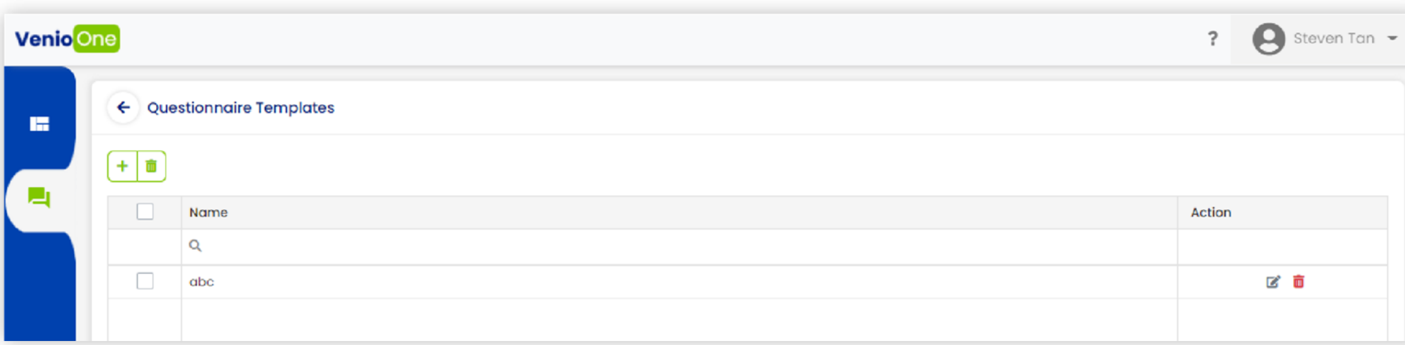
Select the desired option(s) and click OK.

14.5 Creating Questionnaire

This module will send notices and Questionnaires to all the custodians associated with Legal hold. Admin users can create legal hold notices and Questionnaires and assign custodians for whom the notices need to be sent. Once the legal hold notice is sent, it should be emailed to designated custodians.

To navigate to Questionnaire Template UI, click icon from Legal Hold dashboard.

14.5.1 Adding Questionnaire



To add a new questionnaire, follow the below steps:

1. Navigate to Questionnaire Templates screen. Click to add a new questionnaire template.

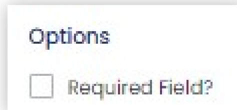
   The Questionnaire Template screen appears.

   You can create a questionnaire using various web elements from this screen.

2. Enter Template Name in the available field.
7. Add New Question by selecting Text Box, Text area, Multiple Choice, Single Choice, Dropdown, Date, or/and Time. Users can click on a web element to select the question type and it will also appear in preview.

Note: At the user end the form will accept the datatype as per the questionnaire fields configured from the admin end.

8. You may also check the Required field by selecting Required field Option. This option validates if left empty by the user while answering the question.



Once Template and Questionnaires are configured, you cannot send notification to custodians. In order to send notification, you must create/import custodian.

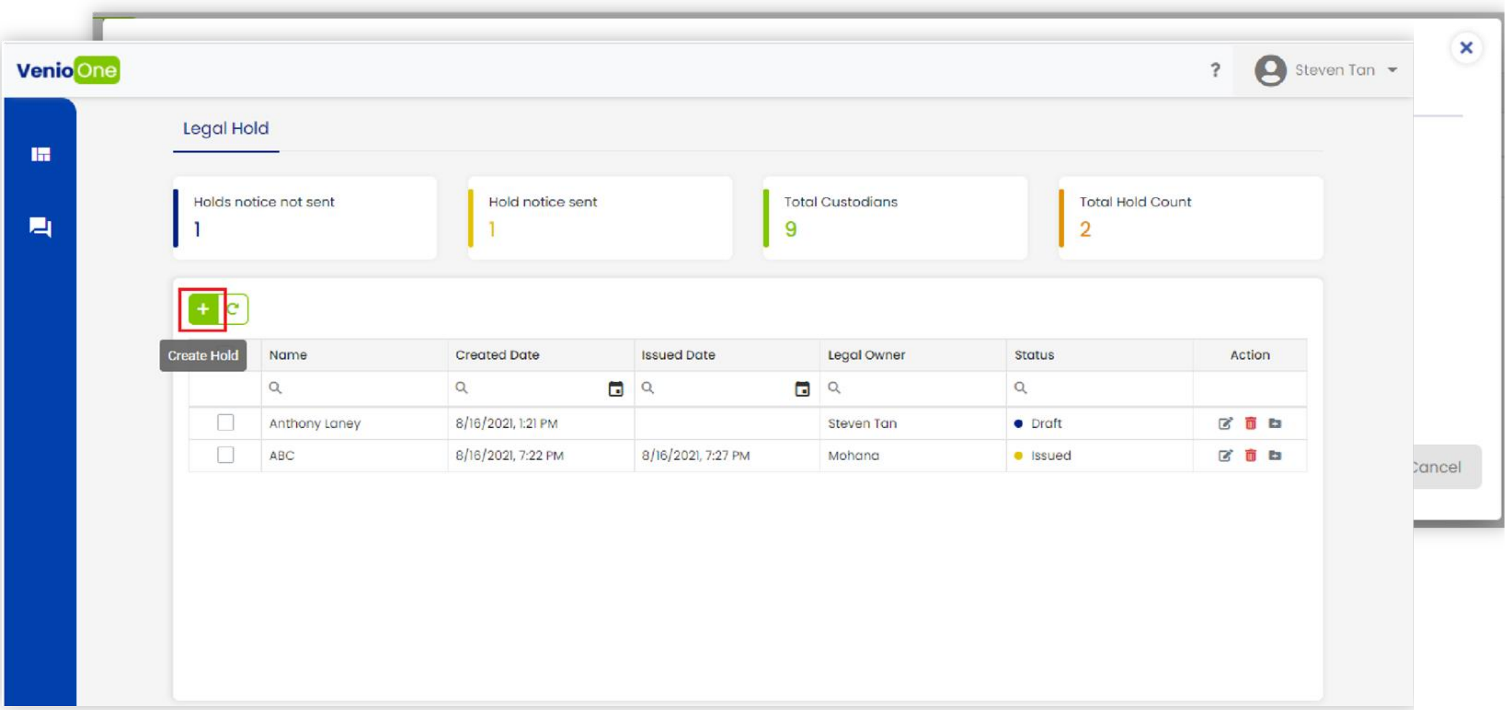
14.5.2 Create/Manage Hold

This module helps users to create a legal hold case.

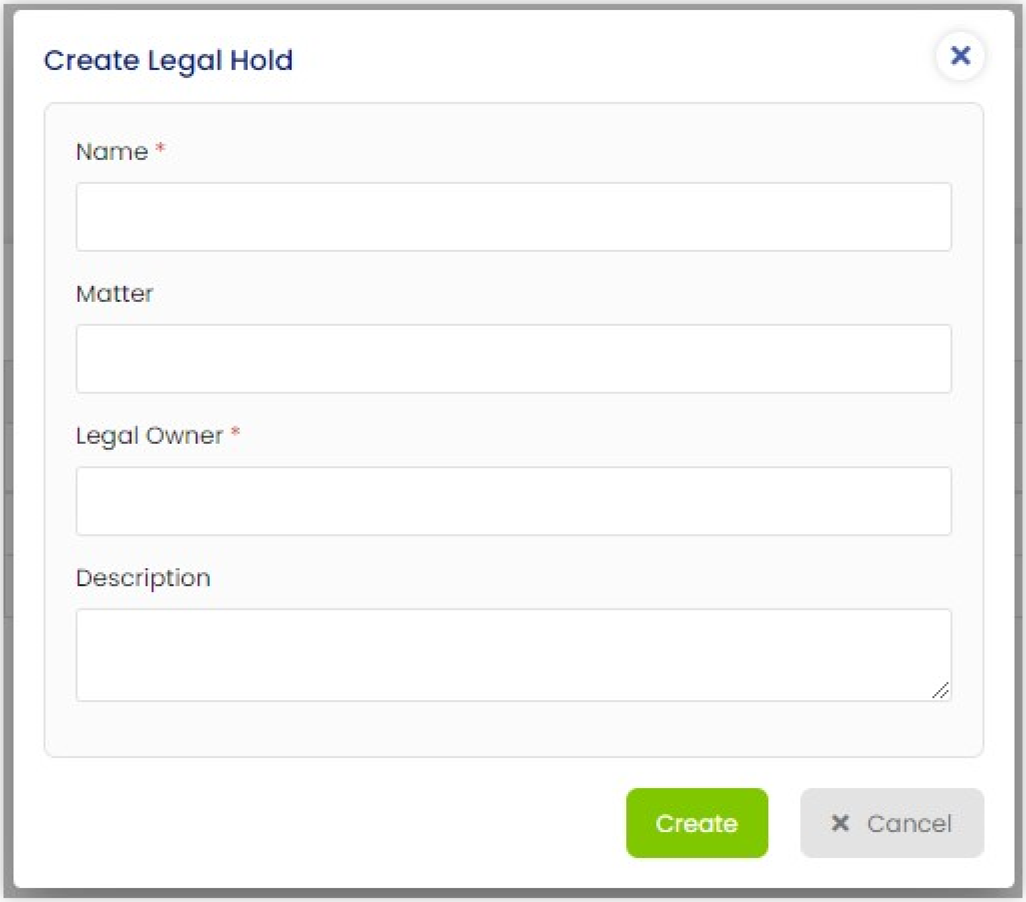
To add a new Hold, follow the below steps:

9. Navigate to the Legal Hold page. Click + to Create Hold.

The Create Legal Hold screen appears.



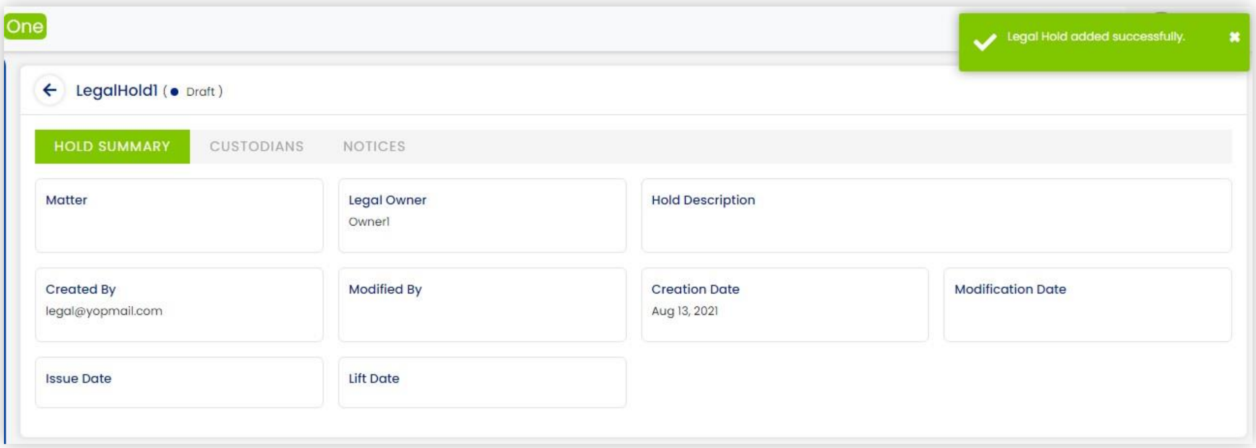
10. Enter Name, matter, legal owner, description and click Create.



When the Hold is created, it appears in the Hold Summary screen.

14.5.3 Hold Summary

The Hold Summary screen displays the Hold Summary, Custodians and Notices.



14.6 Creating/Managing Custodian

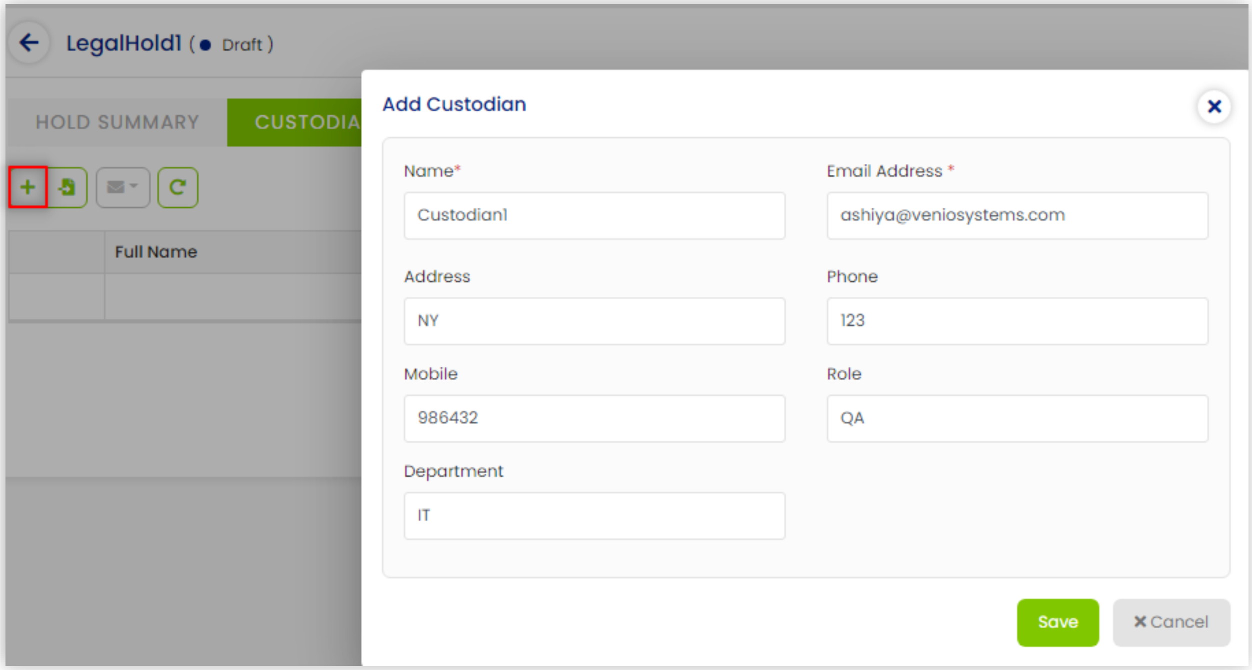
This module maintains the custodians or users that will be associated with the Legal hold project.

14.6.1 Adding Custodians

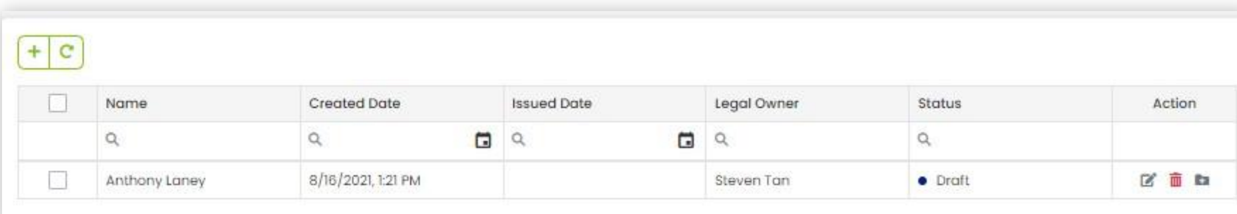
To add custodians, follow the steps below:

1. From Dashboard click on to navigate to hold related page.
2. Click to add a new custodian.

   The Add Custodian screen appears.



3. Enter custodian's name, email address, address, phone, mobile, role and the department.
4. Click Save. The custodian's details are saved.
5. Once the custodian is saved, it appears in the dashboard as shown below:



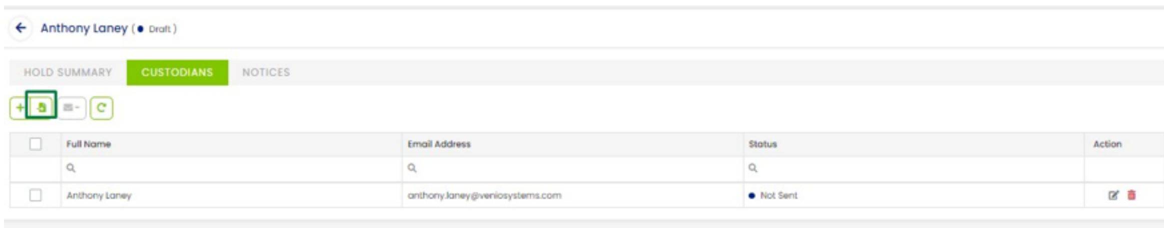
You can edit, delete, or view details. You may also filter the custodian by:

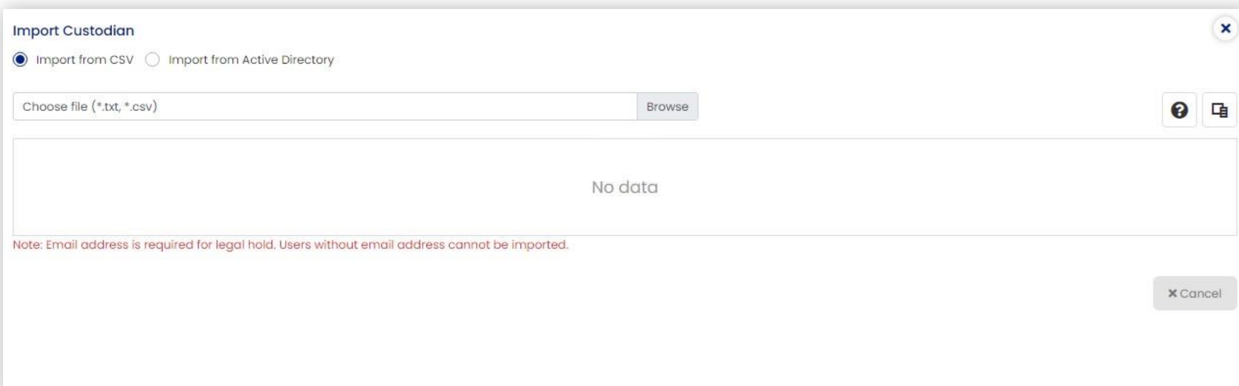
- Name
- Created date
- Notice issue date
- Legal Owner
- Status

14.6.2 Importing Custodian

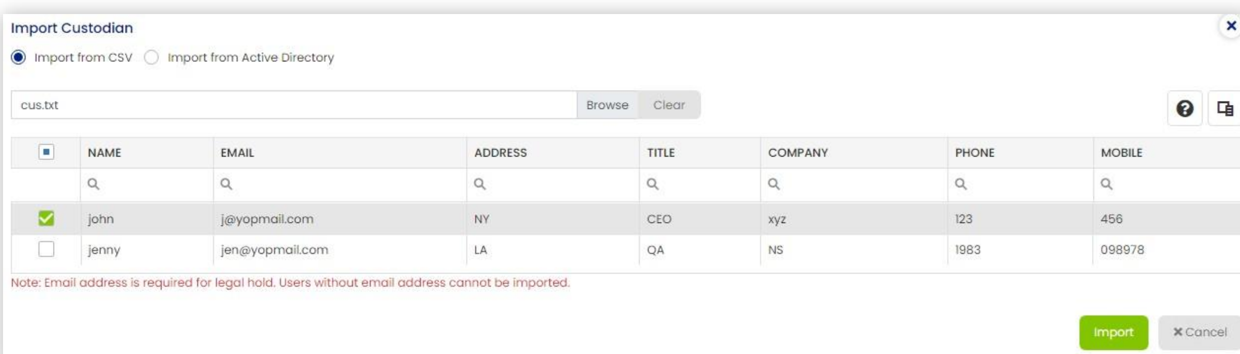
To import custodians, follow the steps below:

1. From Dashboard click on to navigate to hold related page.
2. Navigate to the Custodians tab. Click icon to import custodian.
3. Browse and load the custodian list. By using icon, you can choose which column to display.



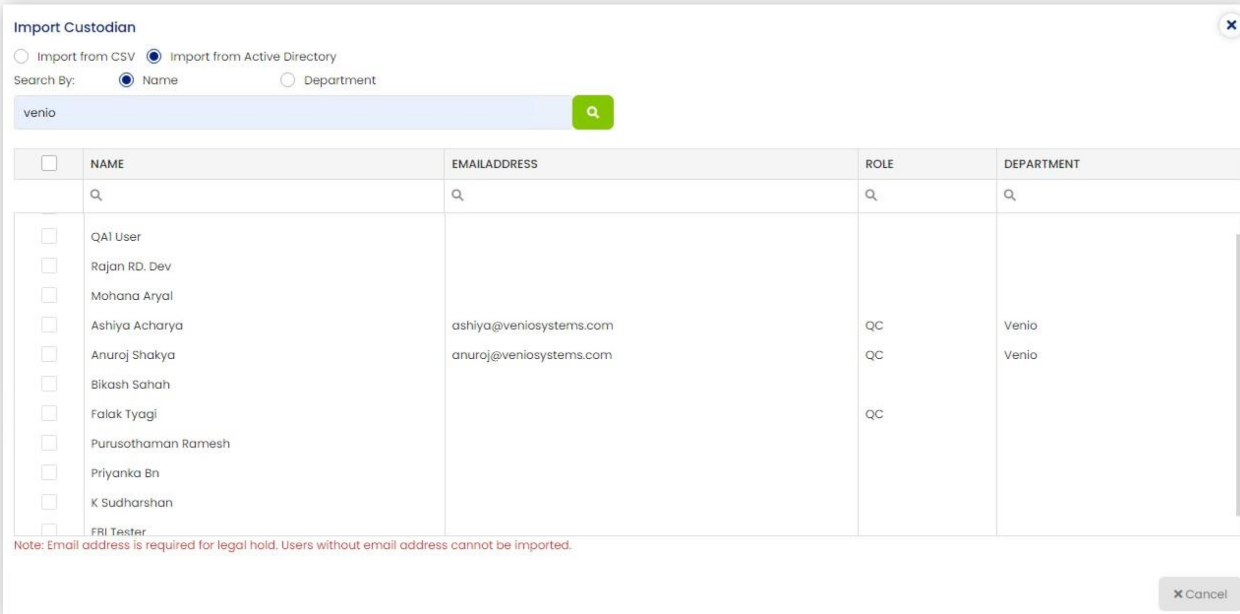


4. Custodians can be imported using either of the following options:
   a. Import from CSV
      Browse a load file in.csv or.txt format. Select custodian(s) and click Import to import the custodian.



   b. Import from Active Directory

- Search by Name - Enter the name to search
- Search by Department - Enter the department to search



5. Select custodian and click Import to import the custodian.

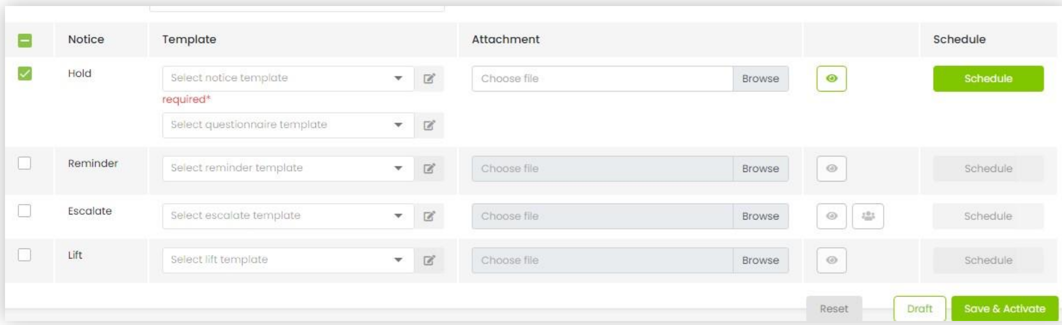
Note : This section is only available when Enable active directory to Import users is selected in Active Directory Setting.

14.6.3 Sending Legal Notice

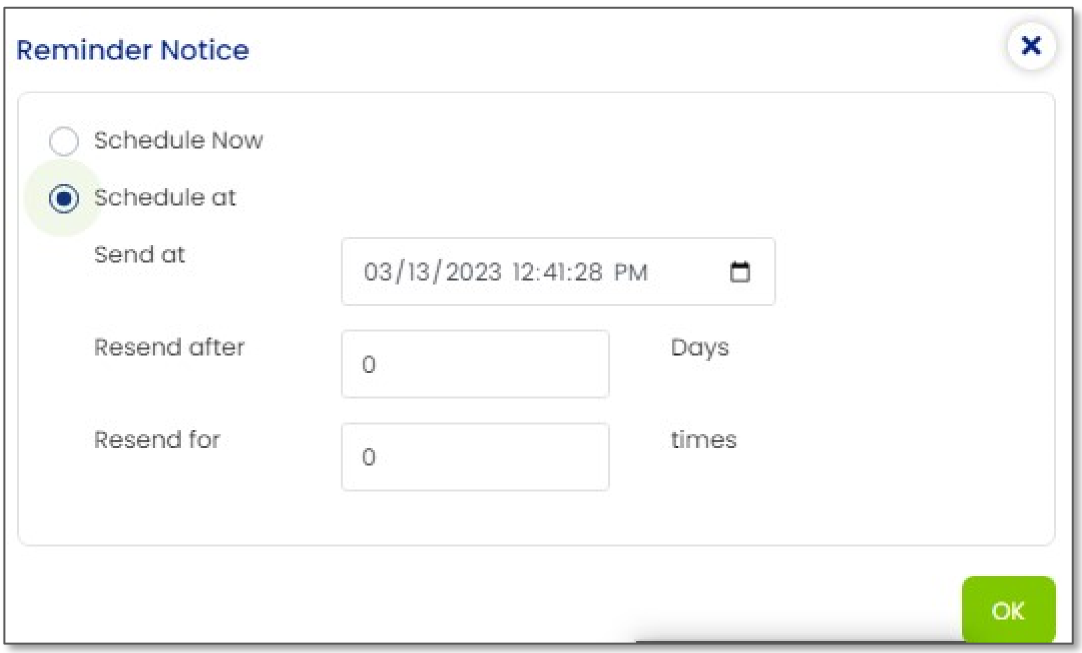
This module sends notices and Questionnaires to all the custodians associated with Legal hold. Admin users can create legal hold notices and Questionnaires and assign custodians for whom the notices are to be sent. Once the legal hold notice is sent, it is emailed to designated custodians.
To send legal notice, follow the steps below:

1. From Dashboard click on  to navigate to hold related page.
2. Navigate to the Notices tab.

Venio



3. Select Hold template from the available drop-down. You can also add any supporting documents by selecting the file from the corresponding drop-down.
4. Click Schedule to schedule sending the notice at a specific date and time.



You can either schedule instantly or pick a date and time. Click OK.

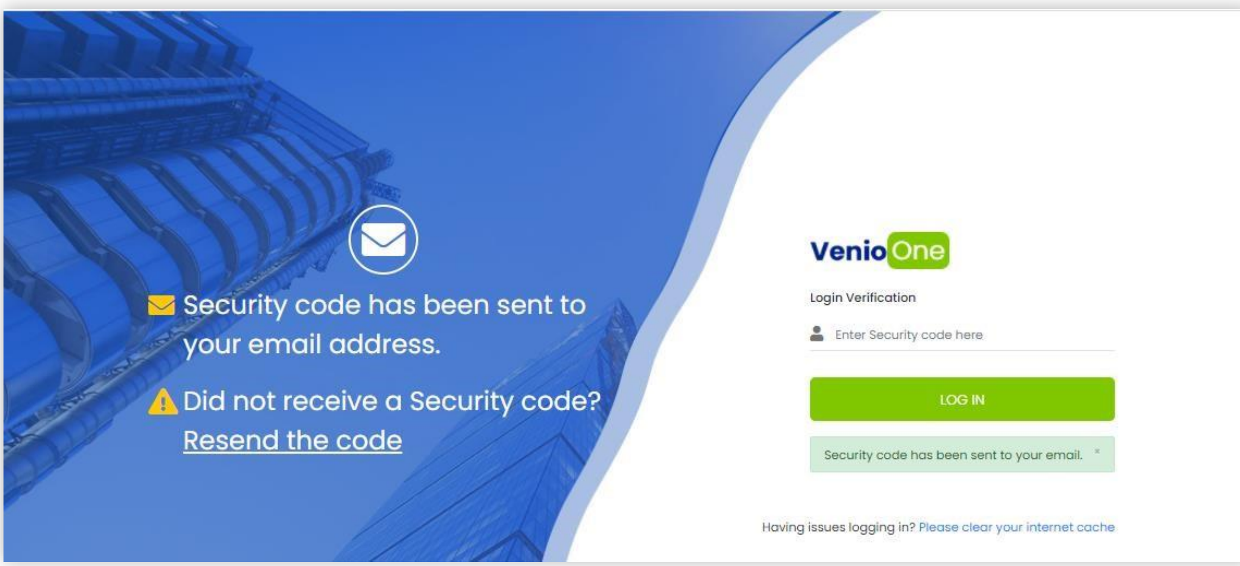
5. Select Reminder template and supporting document. You can schedule reminder by clicking on the corresponding Schedule button.
6. Select Escalate template and supporting document. You can schedule Escalate by clicking on the corresponding Schedule button.
7. Select Lift template and supporting document. You can schedule left by clicking on the corresponding Schedule button.
8. Click Save & Activate to send notification.
9. You can click on Draft if you want to save the notice and send later. The Notice is saved for further use.

14.6.4 Accepting the Notification

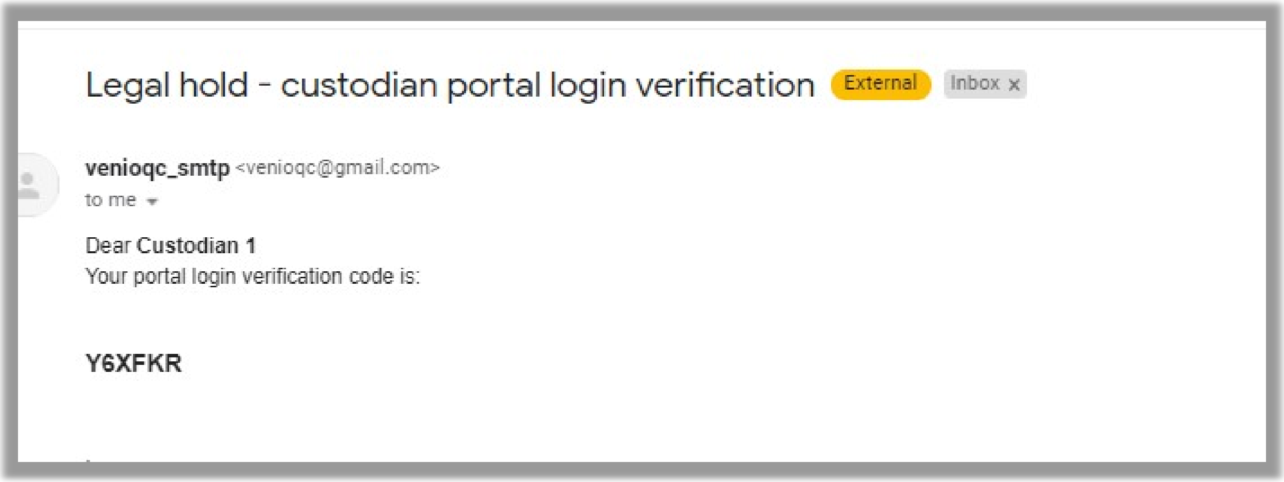
As soon as the notification is sent, the custodian receives notification with the link as shown in the screenshot below:

To accept the notification, follow the below steps:

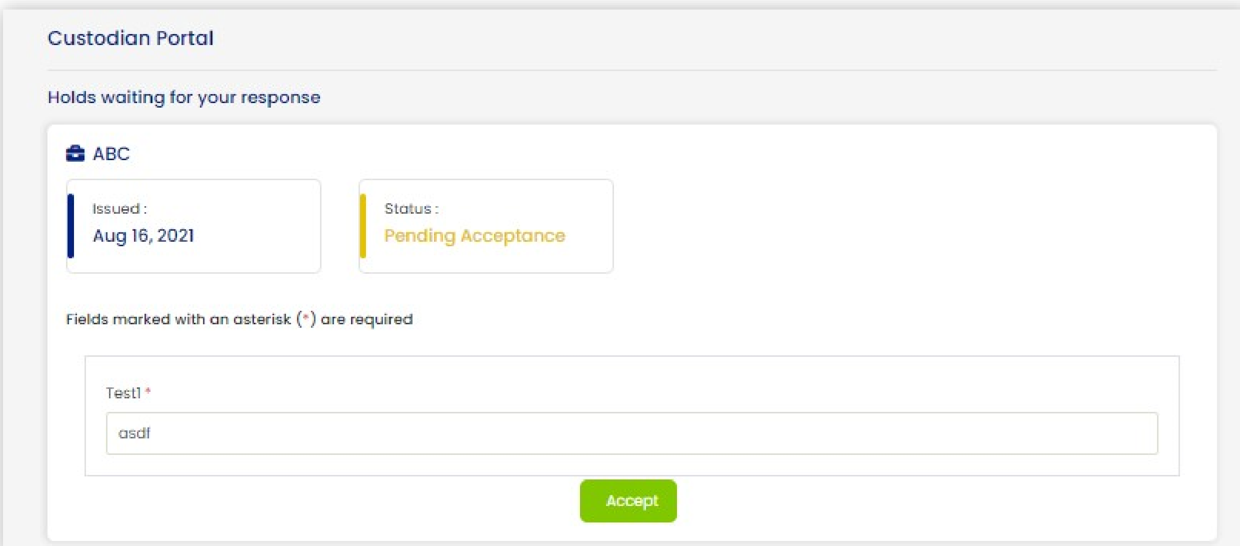
1. Click in the link to navigate to Legal hold Notice.



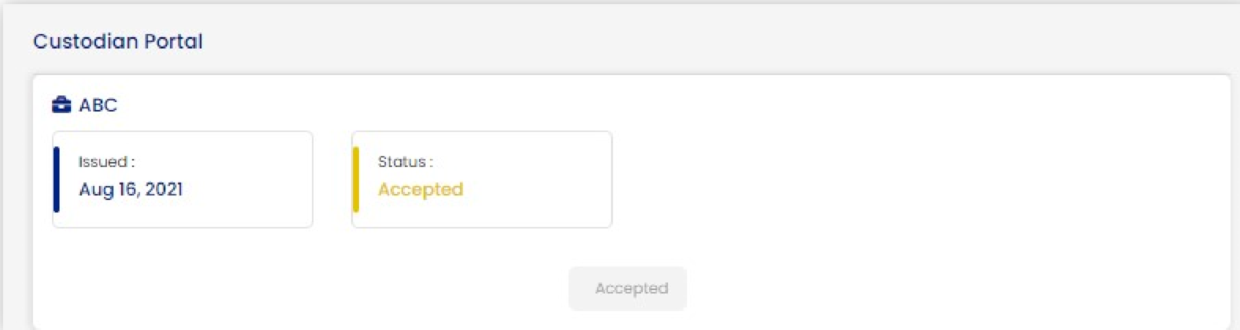
2. Once you click in the link you will also receive the verification code in your email as shown in the screenshot below.



3. Enter the Verification code. The following screen appears:



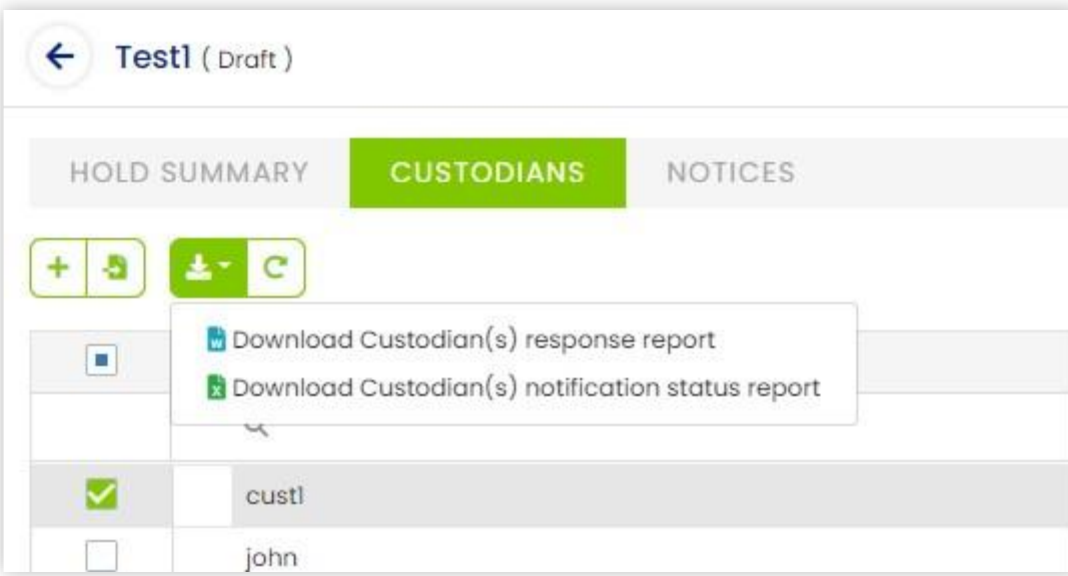
4. The notification status as well as issue date. You may answer the question associated with the notice and click Accept to accept the notification. This action will change the status both user and admin end.



14.6.5 Downloading Custodian Reports

Custodian Response and Custodian Notification Status Reports for the selected custodians can be downloaded from the Custodian tab.

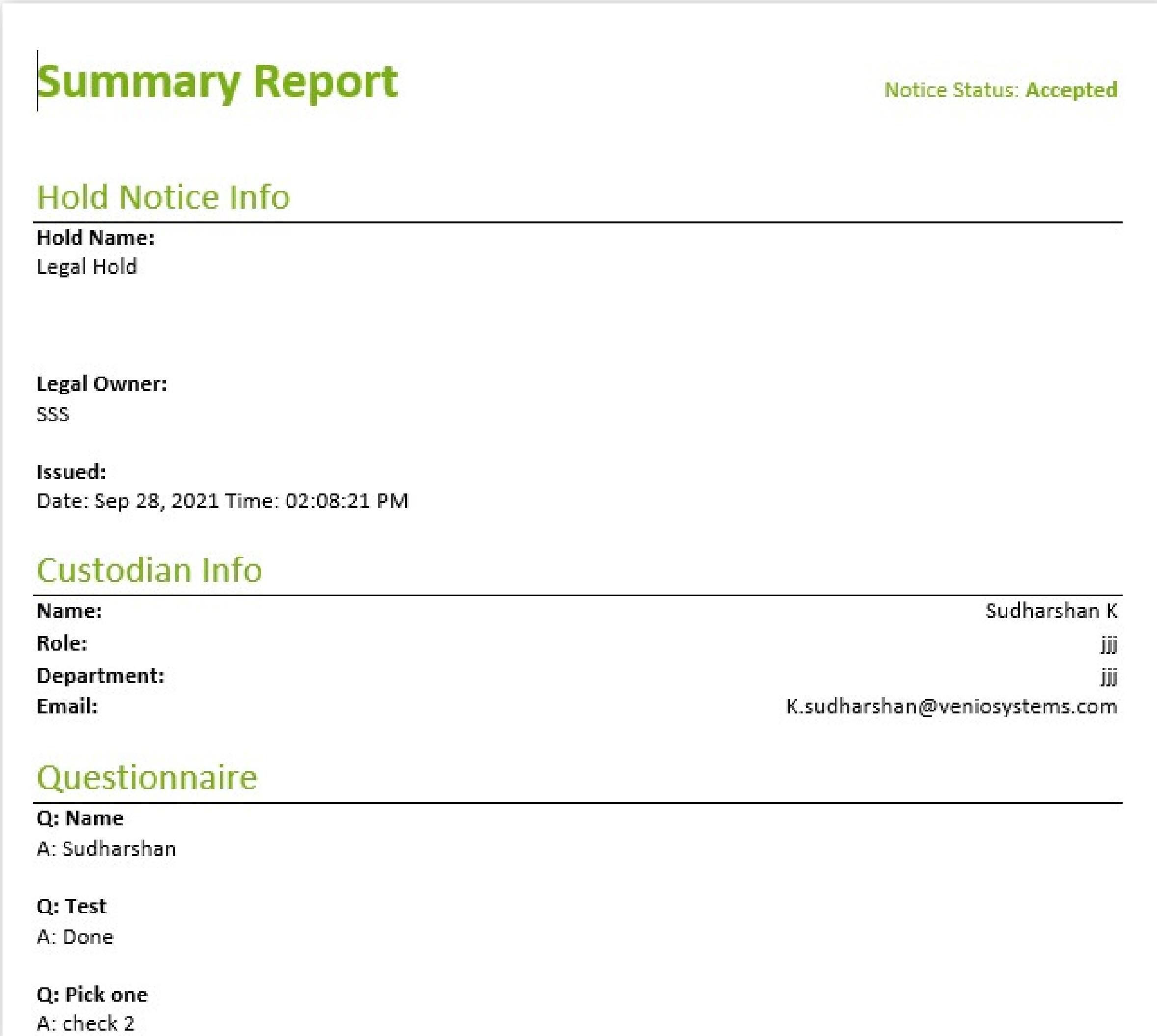
Select the desired custodian(s). Click on the download icon.



Click on Download Custodian(s) response report or Download Custodian(s) notification status report.
Report for Custodian(s) Notification Status will be downloaded in Excel format.

Full Name	Email Address	Status			
Sudharshan K	K.sudharshan@veniosystems.com	Accepted			
	Summary of Sudharshan K				
	Issue Name	**Notice Type**	**Notification Status**	**Sent On**	**Accepted On**
	sss	Hold Notice	Accepted	9/9/2021 4:55:03 AM	9/9/2021 5:10:41 AM
	s	Hold Notice	Accepted	9/9/2021 5:10:03 AM	9/9/2021 5:12:37 AM
	Test	Lift Notice	Sent	9/28/2021 5:16:58 AM	
	todo 1	Hold Notice	Not Sent		
	todo 1	Reminder Notice	Not Sent		
	todo 1	Lift Notice	Not Sent		
	todo 1	Escalation Notice	Not Sent		
Notice	noticetest777@gmail.com	Pending Acceptance			
	Summary of Notice				
	Issue Name	**Notice Type**	**Notification Status**	**Sent On**	**Accepted On**
	Notice3	Escalation Notice	Sent	9/14/2021 11:02:55 AM	
	todo 1	Hold Notice	Not Sent		
	todo 1	Reminder Notice	Not Sent		
	todo 1	Lift Notice	Not Sent		
	todo 1	Escalation Notice	Not Sent		
	Verifying Notices	Reminder Notice	Sent	9/20/2021 6:05:03 AM	
	Verifying Notices	Hold Notice	Pending Acceptance	9/20/2021 5:45:03 AM	

Report for Custodian(s) Response will be downloaded in Word format.



Summary Report

Notice Status: Accepted

Hold Notice Info

Hold Name:
Legal Hold

Legal Owner:
SSS

Issued:
Date: Sep 28, 2021 Time: 02:08:21 PM

Custodian Info

Name:	Sudharshan K
Role:	jjj
Department:	jjj
Email:	K.sudharshan@veniosystems.com

Questionnaire

Q: Name
A: Sudharshan

Q: Test
A: Done

Q: Pick one
A: check 2

14.7 Active Directory Setting

Active Directory Setting can be configured from the Active Directory Setting option in the sidebar.

Select Enable active directory to Import users
Enter Domain Server Name, Domain Name, Domain Username and Domain Password. Click Save.

15 Relativity Connector

The Relativity Connector enables you to seamlessly promote documents for review from the Venio instance to your Relativity workspace. The administrator will be able to configure your Relativity environment, set up mapping between the Venio and Relativity fields and use the Production module to scope out the data the needs to be promoted to Relativity. Please note that overlay is not yet supported.

15.1 Feature Flag - ENABLE_CONNECTOR

We use the Feature flag - ENABLE_CONNECTOR for relativity, which is by default is set to 0. Only when we change this default to 1 available in control setting, the Changes done in relativity including in the Admin and Production module is shown/displayed in the UI.

15.2 Authentication/Authorization

In the production destination page, when the user selects relativity environment, it will show the login popup where the user provides relativity login credentials.

Username

It is a textbox control where the user provides a relativity username.

Password

It is textbox controls to provide relativity password. The password input box will be of type password.

Do not ask again

If the user selects this checkbox option, then relativity credentials will be stored in the VOD backend table with a password in encrypted form. So, later when the same environment is selected by the user, the login popup won't be shown.

Sign In

It validates the provided relativity login credentials.

If valid, then the login popup will be closed and loads the permitted relativity workspaces in the *Workspace* dropdown control.

And, also saves the relativity credentials in the following backend table if *Do not ask again* checkbox is selected.

DB Table Name: tbl_ep_UserConnector

This table should be structured as follows -

- Id - PK, Autoincrement
- UserId - Logged in Venio user-id
- EnvironmentId - Selected relativity environment id
- Details (Xml) - Relativity username and password. The password should be in an encrypted format.
- CreatedOn - Created date time
- LastModifiedOn - Last modified date time

If invalid, then it will show the authentication failed error message - *Failed to connect relativity*.

Environment selection behavior

If relativity credentials are not saved on the VOD backend table using the *Do not ask again* checkbox then the login dialog will always be shown when the environment is selected.

Venio

If relativity credentials are already saved in the VOD backend table during relativity login before, the relativity login popup dialog won't be shown on environment selection. It will directly get authentication credentials from the backend table and loads the permitted workspaces for the selected environment.

However, the following UI will be shown just beneath the workspace dropdown control so that the user can modify relativity credentials if required.

Other behaviors such as loading of field mapping when the workspace gets selected, and import functionality on the relativity platform on production will be the same as before.

15.3 Admin - Relativity Environment Configurations and Field Mapping

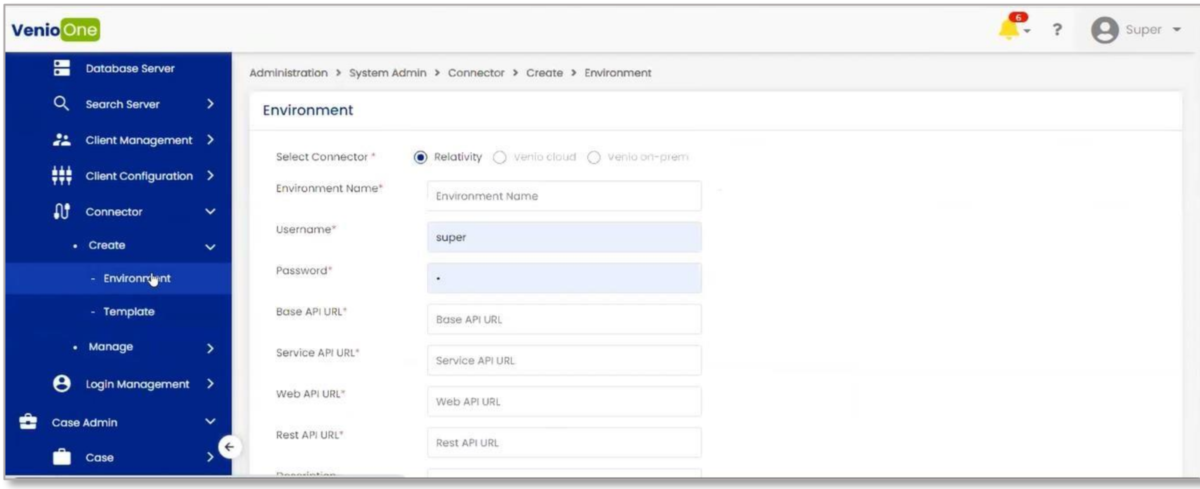
An admin can configure the relativity connector and do the mapping of fields from Venio and Relativity fields. Before mapping, you must first configure the Relativity connector.

The Connector module is accessible to 'Venio Admin' only by default. To enable access to the connector module to the other user group, new right has been created named "Allow to manage connector".

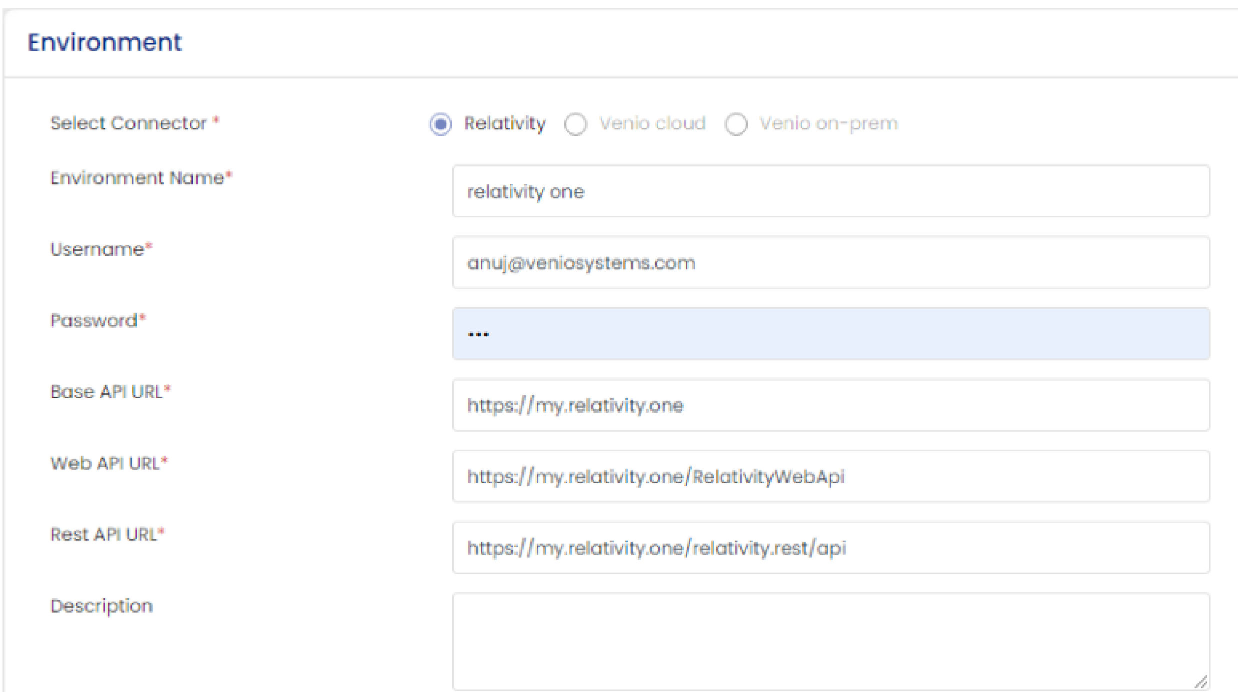
15.3.1 Relativity Environment Configuration

1. Navigate to System Admin > Connector > Create > Environment. The page where you can create environment for different connectors appear.
2. Select Relativity radio button from the available connectors.

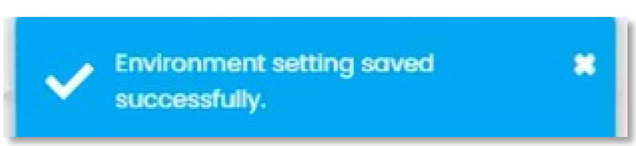
Note: At present VenioCloud and Venio on-prem connectors are disabled.



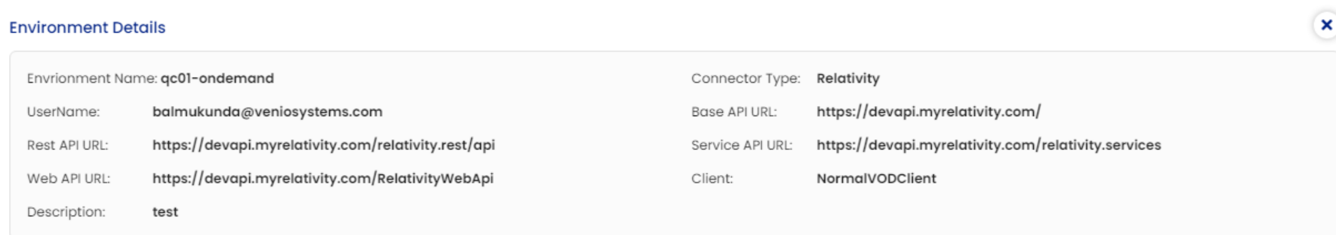
3. Enter the Environment Name, Username and Password in the fields provided.



4. Provide only the Base API URL. Other fields like Web API URL and Best API URL are auto populated, based on the format of relativity. In cases where the APIs are hosted on different environments the URLs can be modified accordingly.
5. Enter the Description and click Create. A confirmation message appears.



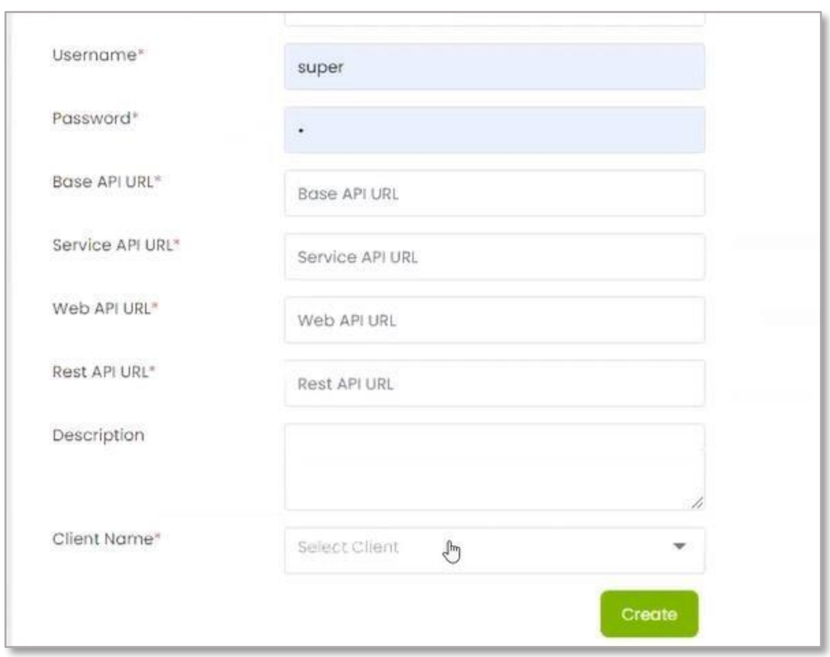
6. Added a new relativity api version in database (RELATIVITY_API_VERSION) whose default value is set to v1
7. Authentication is done using HttpClient from relativity manager
8. Once the environment is created you will be navigated to the Manage page where the newly created environment is listed. You can either View, Edit or Delete the environment by clicking the corresponding icons. By clicking View, the Environment Details screen appears:



15.3.2 Assign Client

You can also assign an environment to a specific client while creating the environment. In this case only the client can access the assigned environment.

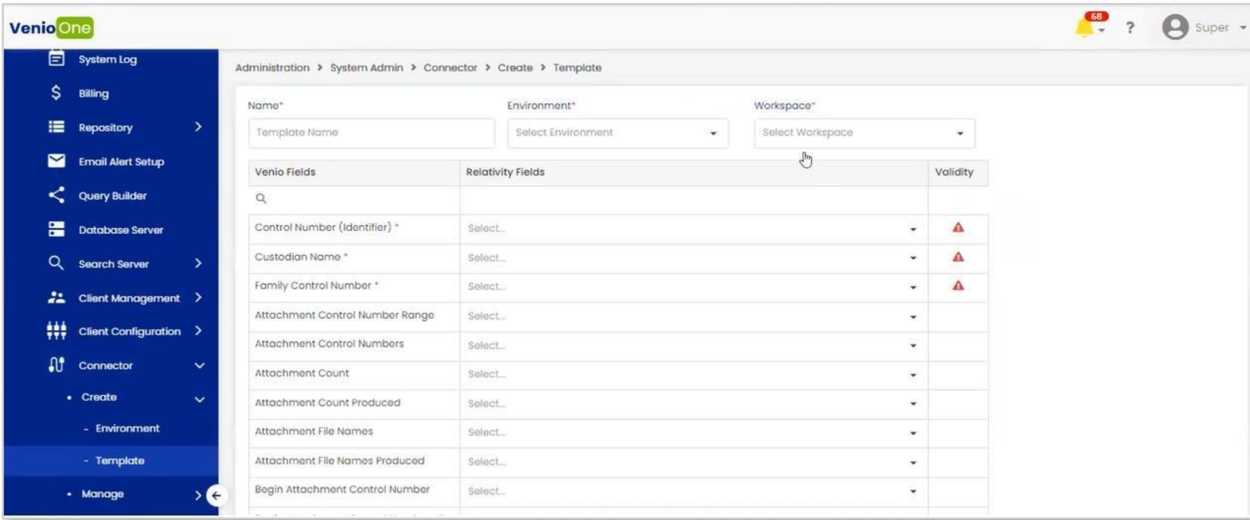
Only users with global role Id 1 (i.e., Venio Admin) and client as internal client will be able to create relativity connector environment under different clients (using the client name selection drop-down). Other users having access to the Admin > Connector module can create relativity connector environment under their own client only.



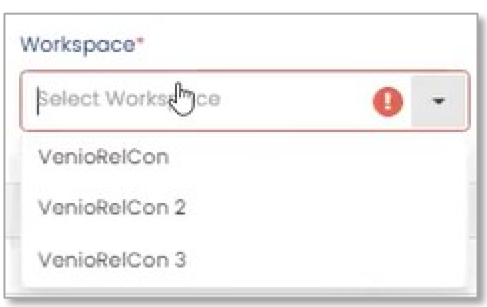
15.3.3 Create Template and Field Mapping

For mapping the fields, you must create a template in which you can store the fields and their respective mappings. We can map the Venio system fields with the relativity fields from any specific relativity workspace only.

1. Navigate to System Admin > Connector > Create > Template. The Template window appears.



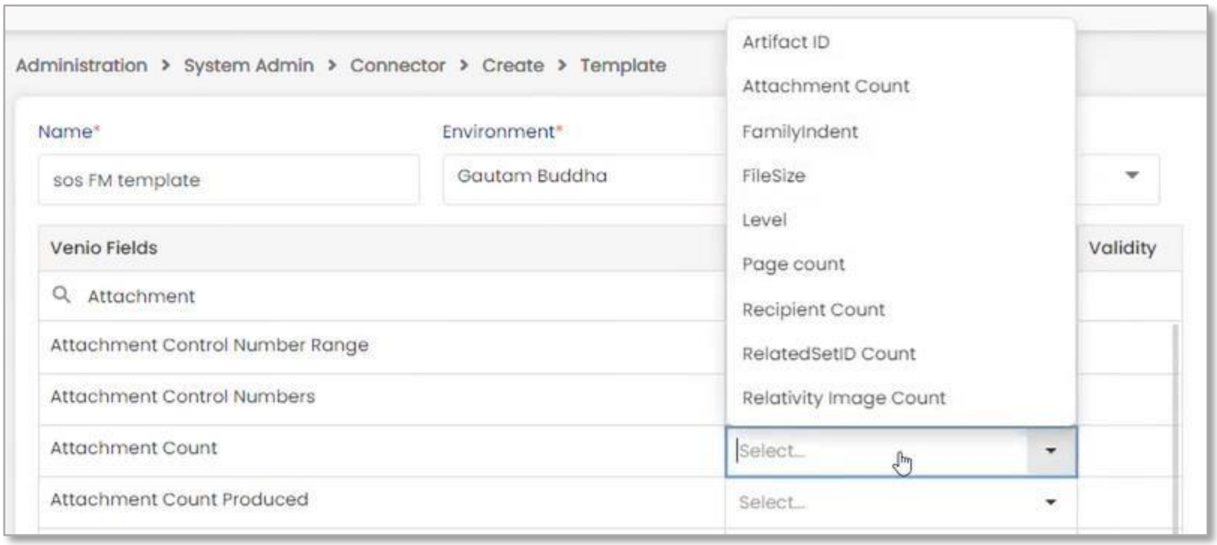
2. Enter a name for the environment in the Name field.
3. Select the environment from the Environment drop down menu. The Environment dropdown is sorted alphabetically, and you can also search for the existing environments by entering the name in the field using search functionality.
4. Select the relativity workspace from the Workspace drop down. The workspace dropdown is sorted alphabetically, and you can also search for the workspaces by entering the name in the field using search functionality.



5. The corresponding fields appear in the list below. The first three fields Control Number, Custodian Name and Family Control Number get automatically mapped.

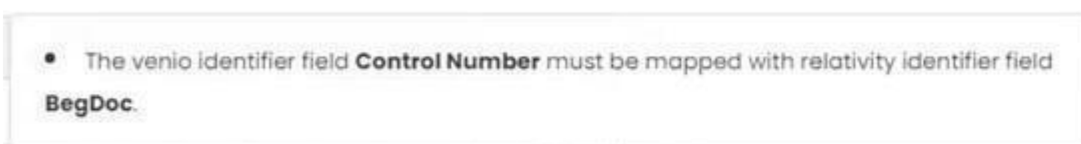
Control number is a unique identity number which can be identified using the provided workspace.

6. Map the Venio Fields with the Relativity Fields in the table below. One Venio field can be mapped to multiple Relativity connector fields.



The mapping fields are arranged such that you can map the fields of same data types. For example, if a numeric field from Venio Field has to be mapped to a field in the Relativity connector, only numeric fields are displayed in the drop-down menu. You can map the numeric field from Venio fields to numeric field of Relativity connector.

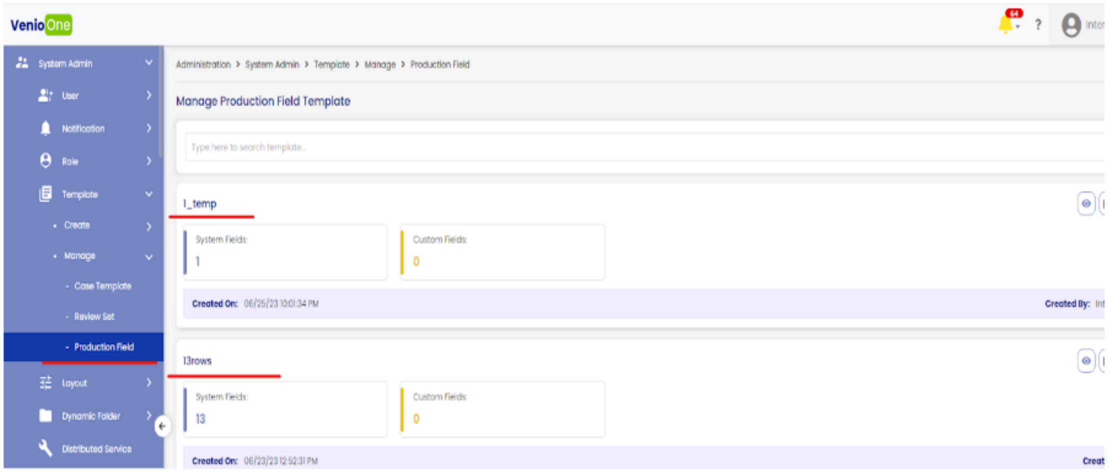
In case of improper mapping a message like the below appears:



The warning messages can be neglected, but if some records meet the criteria stated in the warning message, such records will fail to get imported in the relativity workspace

Import field template is added in create template.The options are populated with all the templates displayed from

Advance Admin → Template → Manage → Production Templates

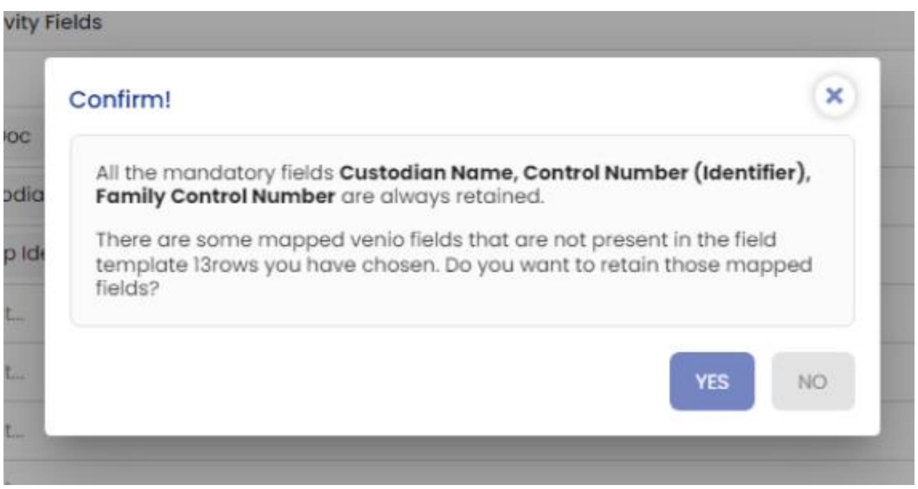


When changing the field template, it should load only the fields that are present in the field template with the mandatory fields for field mapping

Confirmation is seen for retaining the mapped fields

Yes - retain the mappings in addition to the fields from the chosen field template

No - just show fields from the chosen field template

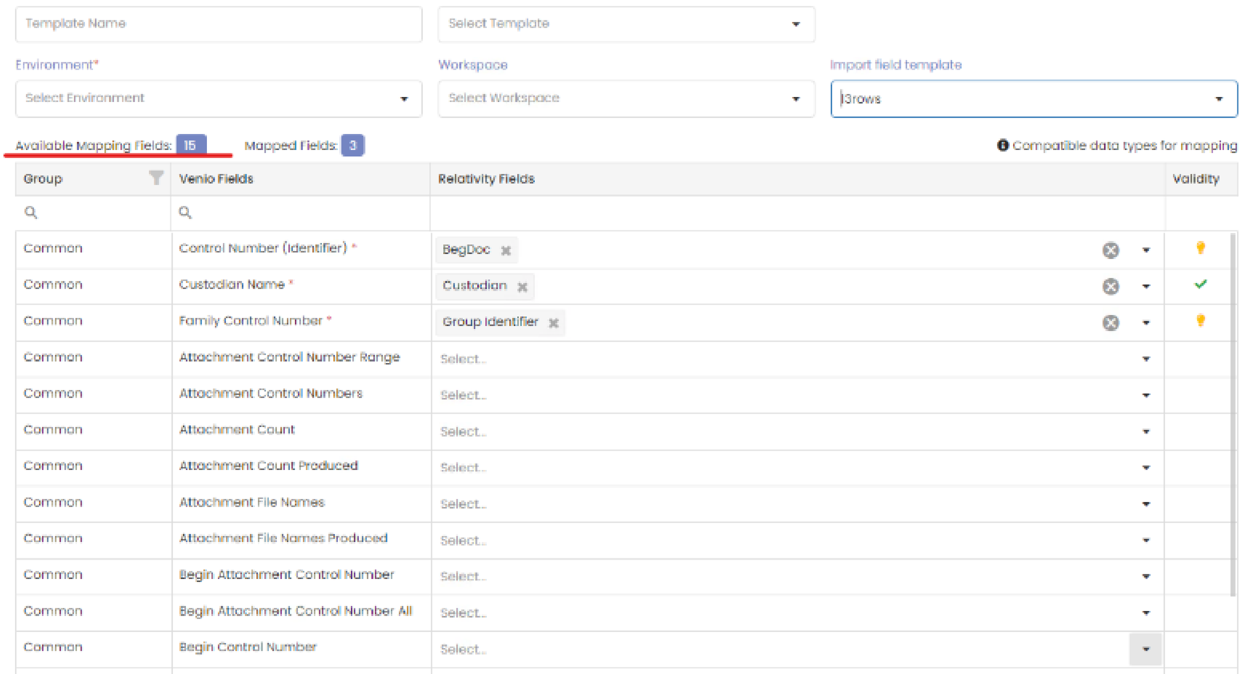


For example

13 rows have below mentioned fields so only these fields including the mandatory fields are seen

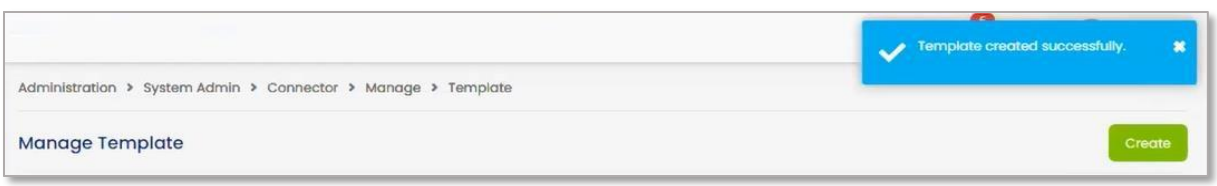
Export Fields Of 13rows

	Group	Field Name	Production Field Name
⠿	Common	ATTACHMENT_CONTROL_NUMBER_RANGE	Attachment Control Number Range
⠿	Common	ATTACHMENT_CONTROL_NUMBERS	Attachment Control Numbers
⠿	Common	ATTACHMENT_COUNT	Attachment Count
⠿	Common	ATTACHMENT_COUNT_PRODUCED	Attachment Count Produced
⠿	Common	ATTACHMENT_FILE_NAMES	Attachment File Names
⠿	Common	ATTACHMENT_FILE_NAMES_PRODUCED	Attachment File Names Produced
⠿	Common	BEGIN_ATTACHMENT_CONTROL_NUMBER	Begin Attachment Control Number
⠿	Common	BEGIN_ATTACHMENT_CONTROL_NUMBER_ALL	Begin Attachment Control Number All
⠿	Common	BEGIN_CONTROL_NUMBER	Begin Control Number
⠿	Common	BEGIN_FAMILY_CONTROL_NUMBER	Begin Family Control Number
⠿	Common	BEGIN_FAMILY_CONTROL_NUMBER_ALL	Begin Family Control Number All
⠿	Common	CONTROL_NUMBER	Control Number
⠿	Common	CUSTODIAN_ID	Custodian Id



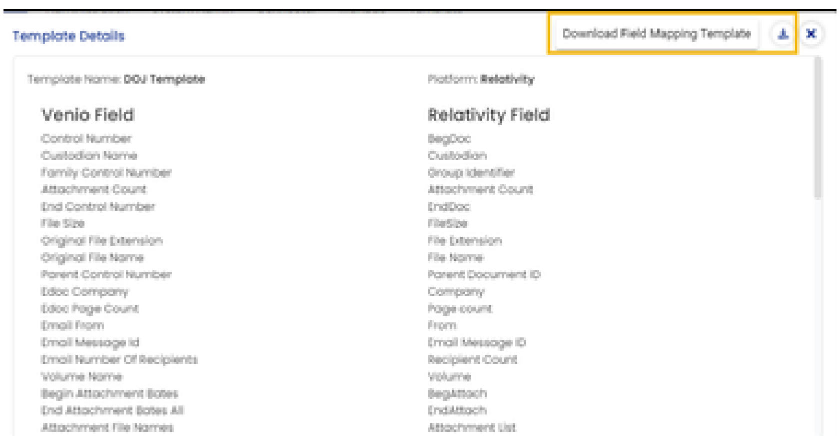
Available fields is changes to 15 as 13 rows had 13 fields and 3 mandatory is always seen with one common fields so total 15 fields are seen.

7. After mapping the fields, click Save. The template is created successfully.



Once the template is created, you can edit, delete, and view the templates from the Manage Template page.

View Template:



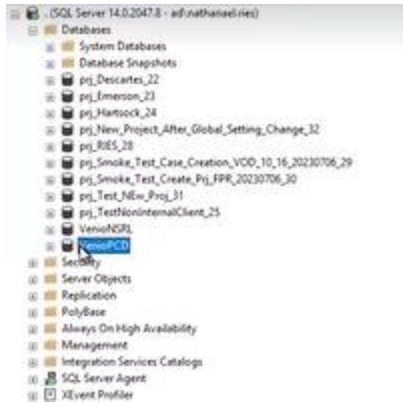
Click on the Download Field Mapping template on the top right. It will download the mapped Venio Field and Relativity Field template in csv format.

15.3.1 Admin – Relativity One Environment Configurations and Field Mapping

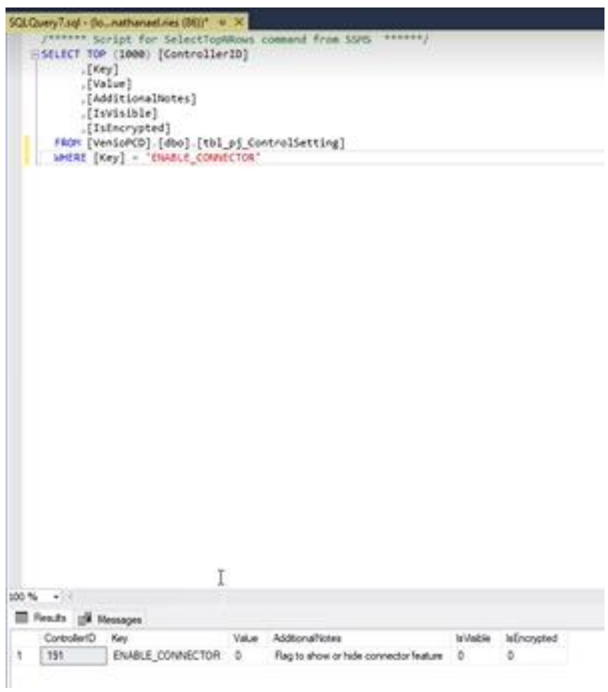
An admin can configure the relativity one connector for uploading the exports directly and perform the mapping of fields from Venio and Relativity One fields. To perform this operation, you must first configure the Relativity connector within the SQL database. The SQL Database Administrator with proper permissions can carry out this step if you would like to activate the feature. Without activating in the SQL, the Connector option in the Admin Settings under System Administration is disabled.

To connect Relativity Connector within the SQL server:

1. Connect to the SQL server, and navigate to the database folder VenioPCD.



2. Under VenioPCD folder, locate dtbo.tbl.pj_ControlSetting and open the database table.
3. In the query section, enter a where clause. The query is *where [Key] = "ENABLE_CONNECTOR"* as shown in the below image.



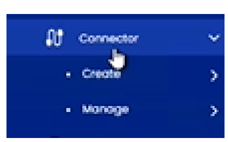
4. After executing the query, you can see the fields such as controller ID, the key, the value of the key additional notes, which is a description of what the key does, Is Visible, which allows you to enable or disable the settings.
5. If the Value field is set to 1, the value field would be encrypted automatically by Venio so that it is stored encrypted within the database, whereas if it is set to 0, it is not an encrypted field.

6. As you know the Controller ID, you need to execute a query considering the Controller ID, to change the Value field to 1. Enter the query as mentioned below:

   update [tbl_pj_ControlSetting] set value = 1 where ControllerId = xx

7. Execute the query and the value field is updated to 1.
8. Open the command prompt and reset the IIS service and wait till the IIS is started again successfully.

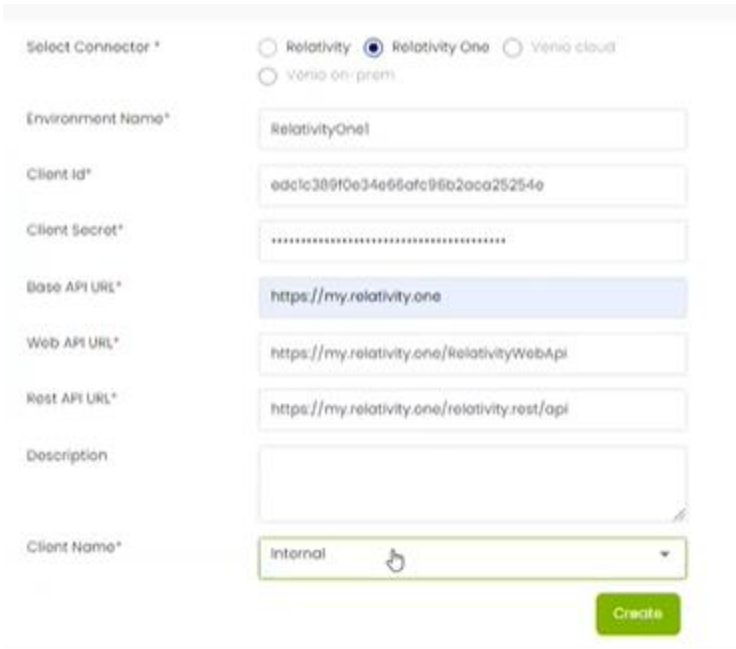
Now, the user can login to the Venio Systems and Connector option is now displayed. Now you need to create an environment.



To create an environment within Venio Systems.

1. Navigate to Admin Settings → Connectors → Create → Environment.
2. By default, the Select Connector is selected as Relativity. Select the Relativity One radio button. Enter the Environment Name.
3. Enter the Client ID and Client Secret credentials as provided by the client.

4. Enter your Venio instance API URL(https://my.relativity.one) in Base API URL textbox. Web API URL and Rest API URL will be auto populated based on the value entered in Base API URL.
5. You can enter the description for your understanding.
6. Select the Client Name.
7. Click Create. A popup Environment Setting saved successfully is displayed at the top right corner.



15.3 Production Changes

To accommodate the Relativity Connectivity, feature various changes have been done for the destination, field mapping, load file and field tabs.

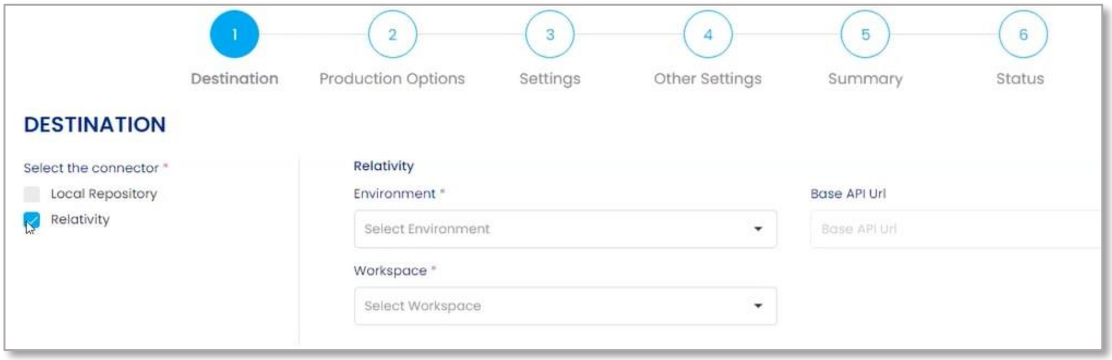
15.3.1 Destination

To navigate to the production template, select a case, click on Produce icon. Destination page appears.

Under Select the connector, additional option Relativity is added. If the user wants to proceed without relativity connector, they can proceed with the other windows from the Production Options. For going ahead with relativity connector, user must select Relativity in the connector list.

Once Relativity is selected, the Environment and Workspace drop boxes are enabled.

Select Environment, corresponding workspaces appear in the Workspace dropdown menu. Select workspace. Base API URL is a read-only field.

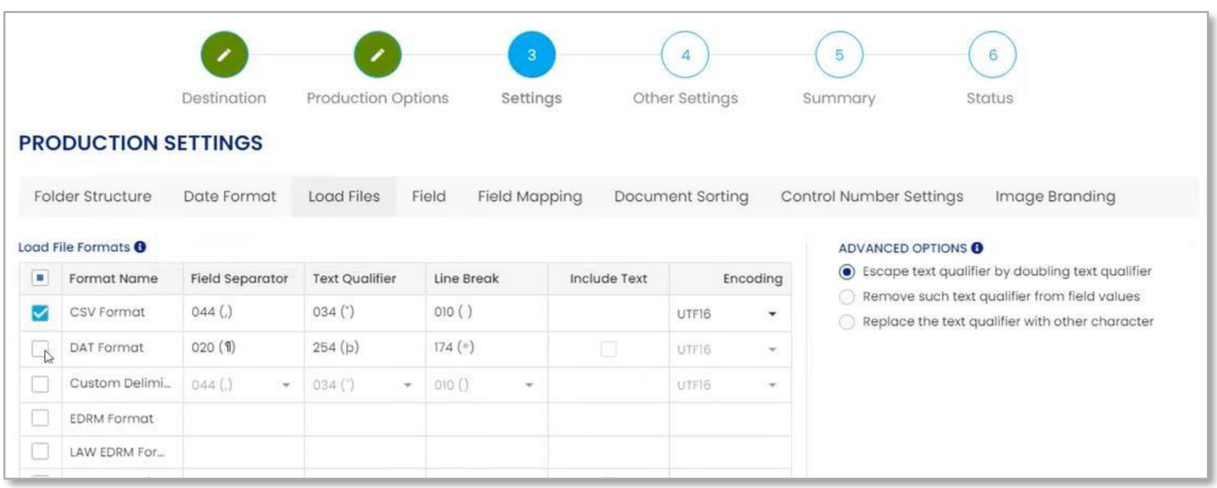


15.3.2 Production Options

As the Production is template-driven, you must select a template from the Production Options from the Template drop down. If the selected template doesn't contain the load files, we will default that to DAT format in the Load files section of production settings.

15.3.3 Load Files

If the selected template from the production doesn't contain the load files, we will default that to DAT format in the Load files section of production settings. Only if the specific load files are chosen the corresponding fields can be displayed in the Field screen.

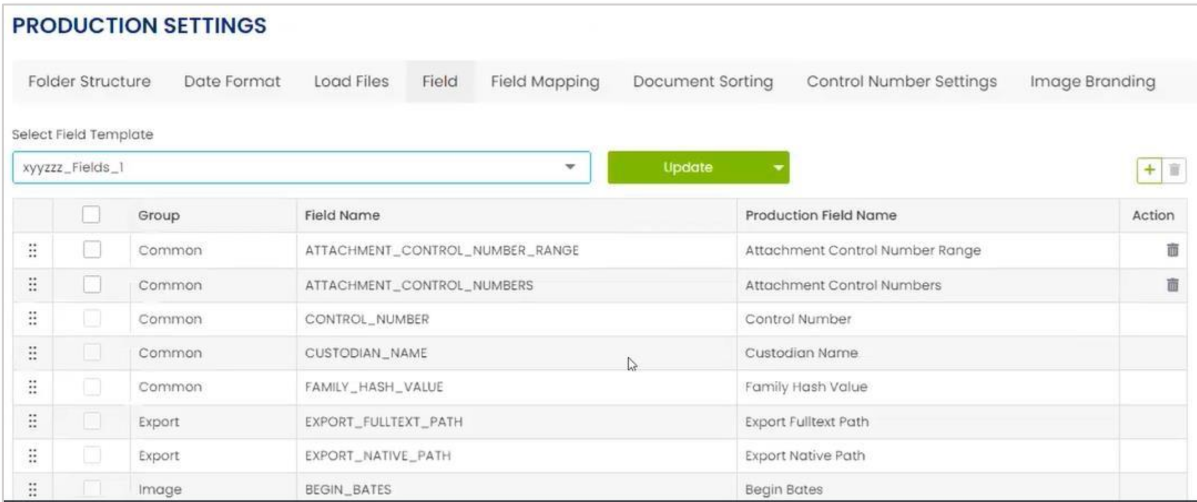


15.3.4 Fields

From the Filed tab, select the field template from the list. The corresponding fields in the templates are added in the table. The mandatory fields Control Number, Custodian Name and

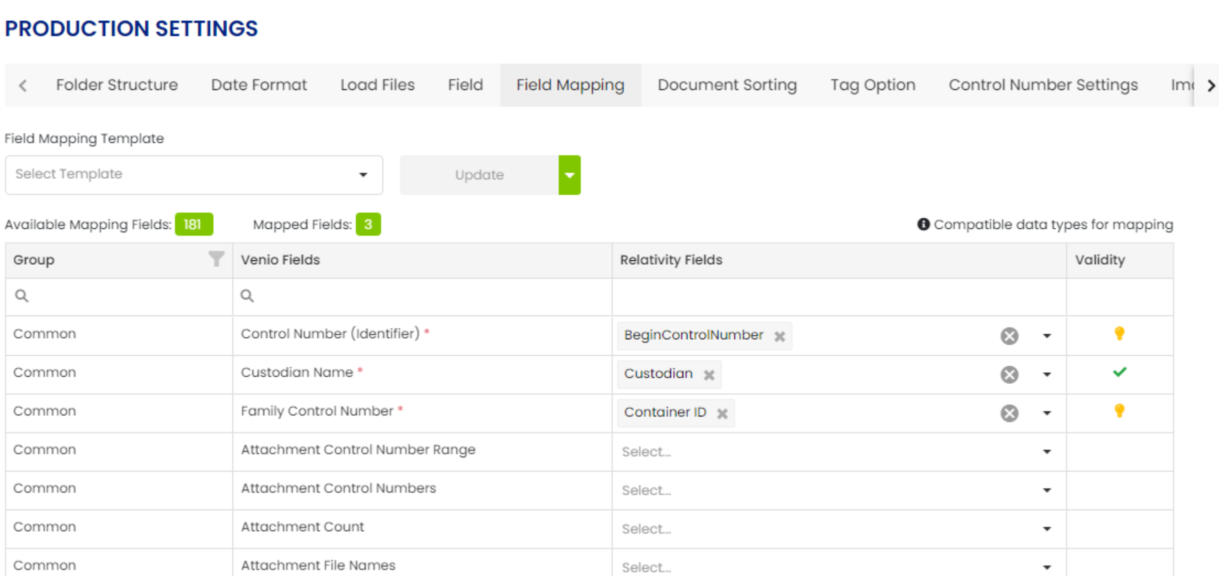
Venio

Family Control Number are disabled for the user once added to the list. The other 3 fields added can be edited based on the selections made in the earlier screes.



15.3.5 Field Mapping

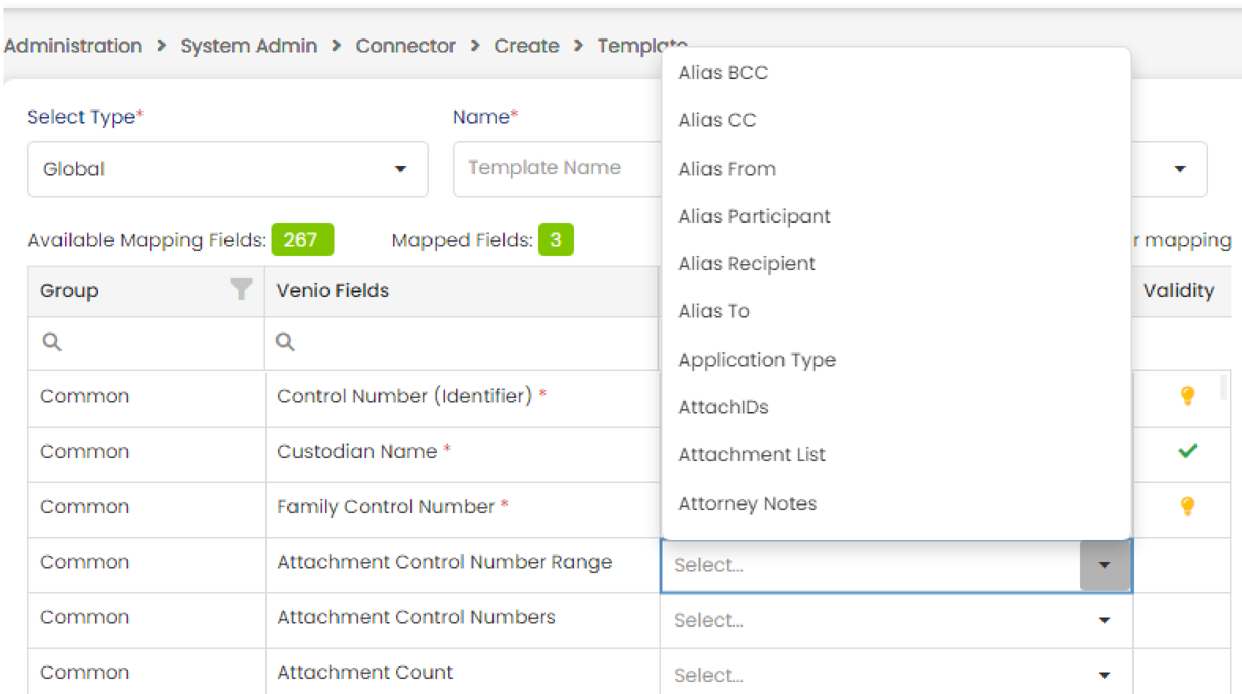
Select the Relativity template from the Field Mapping Template drop down menu. Once the relativity template is selected, the corresponding fields appear in the Available Mapping Fields below:



The default fields Control Number, Custodian Name and Family Control Number are added in the Venio Fields besides which you can map with the Relativity Fields section. Multiple relativity fields can be mapped to a single Venio Field.

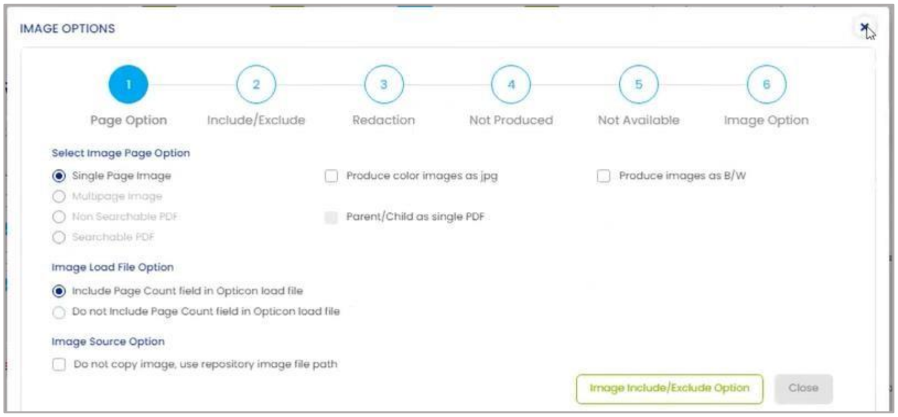
Validity section validates if the fields in the Venio Fields are correctly mapped to the corresponding Relativity Fields. If there is an error, it is displayed in the validity row in the form of images. For example, the Custodian Name in the Venio Fields must be mapped to Custodian field in the Relativity Fields side. If there is a mismatch, the Validity section shows the indicator.

You can select the template related to the relativity connector from the Field Mapping Template drop down. All the mappings done during the creation of template appears in the fields table.



15.3.6 Image Options

If the user has selected a template which contains multiple image options, it is not supported in Relativity. It supports only Single Page Image, and the rest of the image page options are disabled. If the template selected doesn't contain Single Page Image option, a message is displayed to the user.



15.4 Production Module - Ability to Import Selected Source Relativity

We do not import all the files to the root folder in relativity as well. We create a folder with a specific name and push files all files from Venio to that specific folder. Every time we export it creates a folder and put the files in that folder.

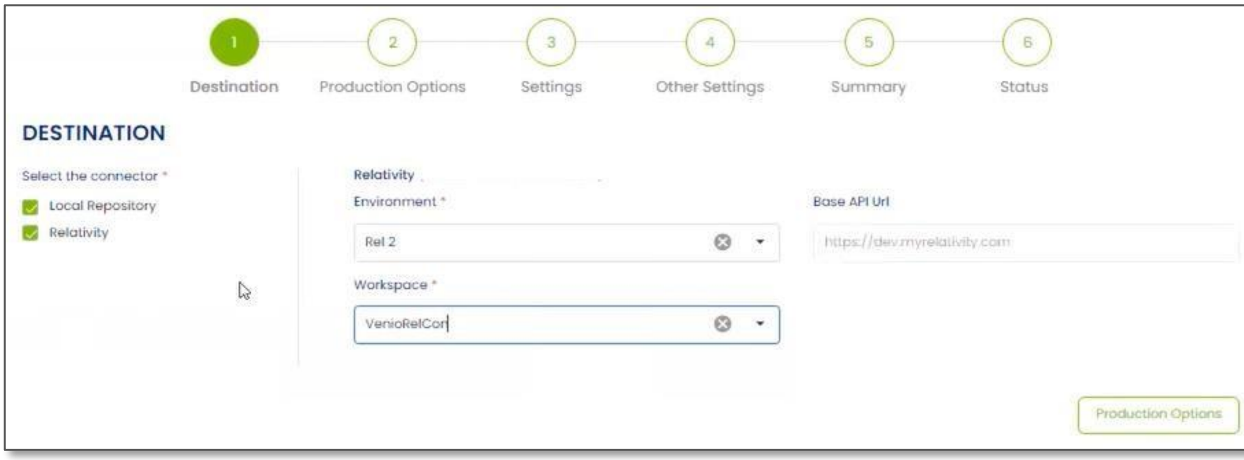
Upon completion of relativity import, appropriate inline notifications are displayed to users so that they know about success or failure of relativity connector. After downloading the production data, the users can view the details of Error/Warnings related to relativity connector.

Whenever a production is started or completed, a separate log gets added for error/warning related to Relativity Connector in the production data. You can click the link available within the notification message to view the log as shown in the picture below.

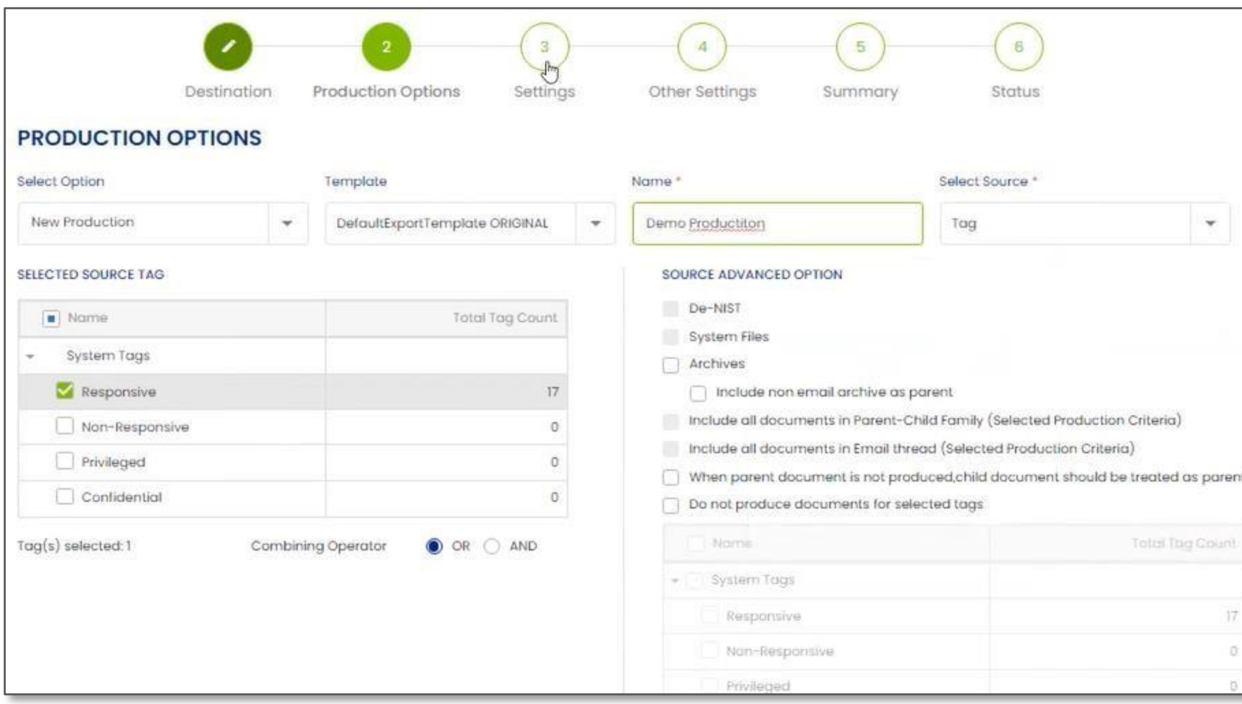
15.5 Production Process

While importing Native, Fulltext or Image in the relativity at the file level, the progress status for relativity import helps users to see the status of the import process.

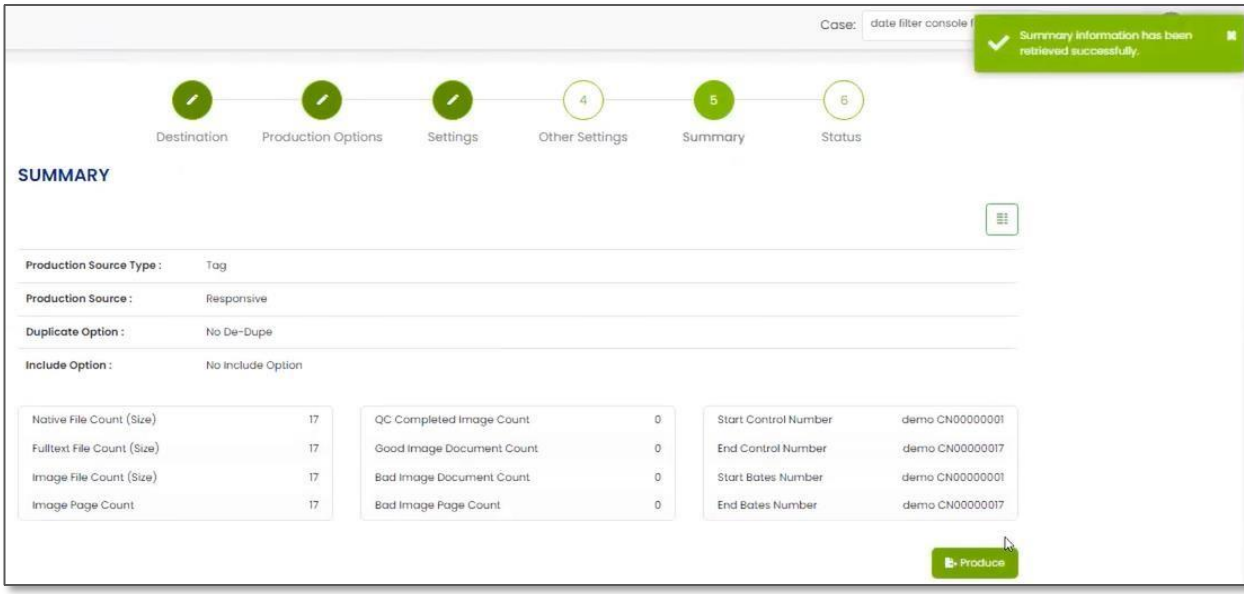
1. In the production module, Destination screen, under the Select the connector dropdown menu, select the Local Repository and Relativity. Select the Environment and the Workspace.



2. In the Production Options screen, select a source and enter a Name. Click Settings tab.



3. In the Settings screen chose all the Folder structure: Fulltext, Native and Image. Select the desired options in all the fields in the settings screen. Click Summary.
4. The Summary screen displays all the information entered/selected in the production module screens. It also displays a success message that the Summary information has been retrieved successfully.

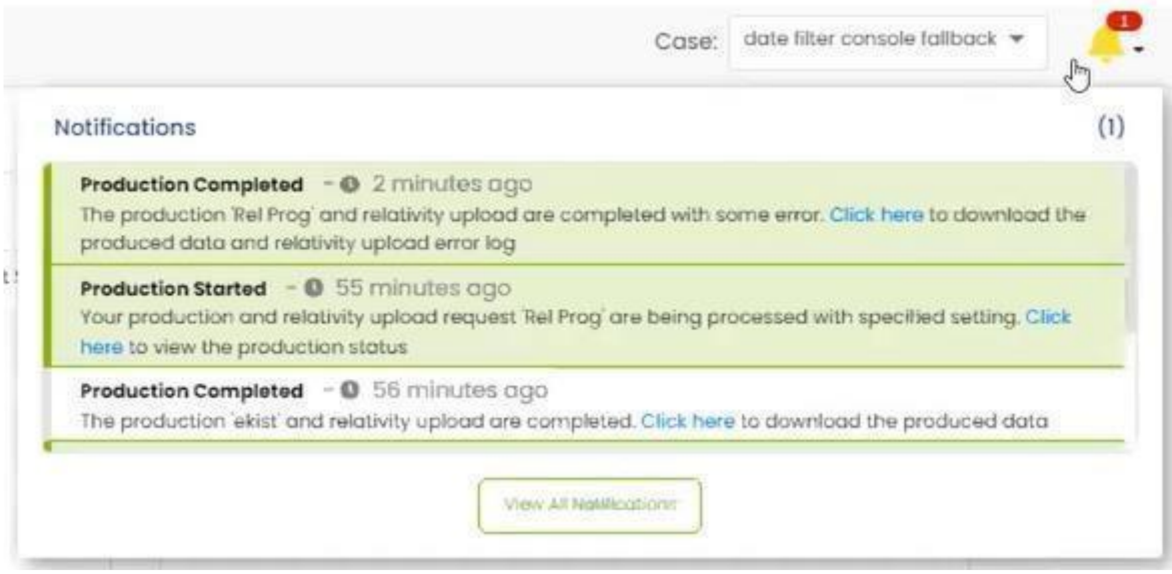


The summary page displays the Fulltext, Native and Image counts for the regular production as well as relativity related if relativity is selected.

5. When the redactive images are produced, the respective native documents are not produced with them. This message is displayed to the user as shown:

6. Click Yes to continue and click Produce. Once the production job is completed a success message appears:

During the production, user receives the notifications when the production is started or completed with the name of the request. By clicking on the Notifications bell icon, you can see the notifications. The same goes as the e-mail notifications as well to the user.

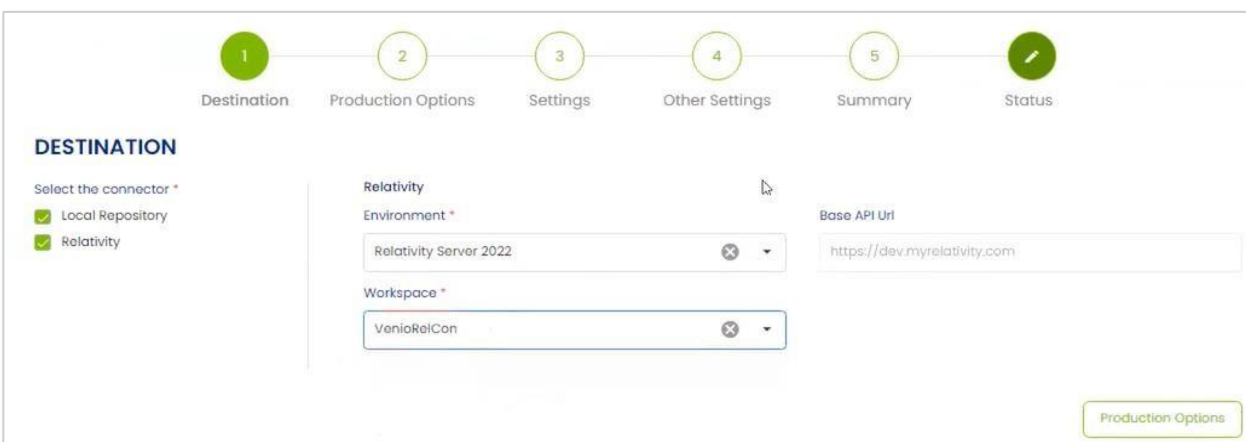


15.6 Reproduce

Reproduce option is used to reproduce the productions in relativity. You can select single or multiple productions for reproducing.

15.6.1 Single Reproduce

1. Navigate to the production template, select a case, click on Produce icon. Destination page appears.
2. Under Select the connector, select Relativity.
3. Select Environment, and Workspace from the dropdown menu.



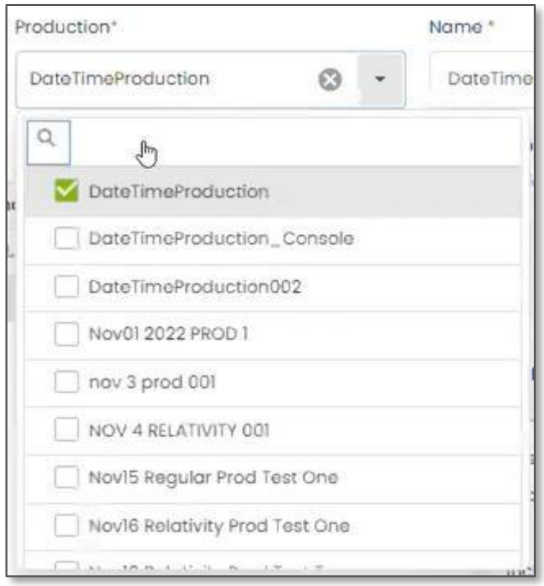
If you have already produced/reproduced the selected workspace for production earlier, you cannot use the same workspace again. The following message appears:

4. Click OK to continue. Select a different workspace to proceed.
5. Click Production Options.
6. Select Reproduce under the Select Option drop-down menu.
7. Select the relativity production you wish to reproduce under the Production drop down.
8. In the Settings tab, ensure you have done the field mapping of the Venio and the relativity fields. When all the details are entered properly, click the Summary tab.

15.6.2 Multiple Preproduce

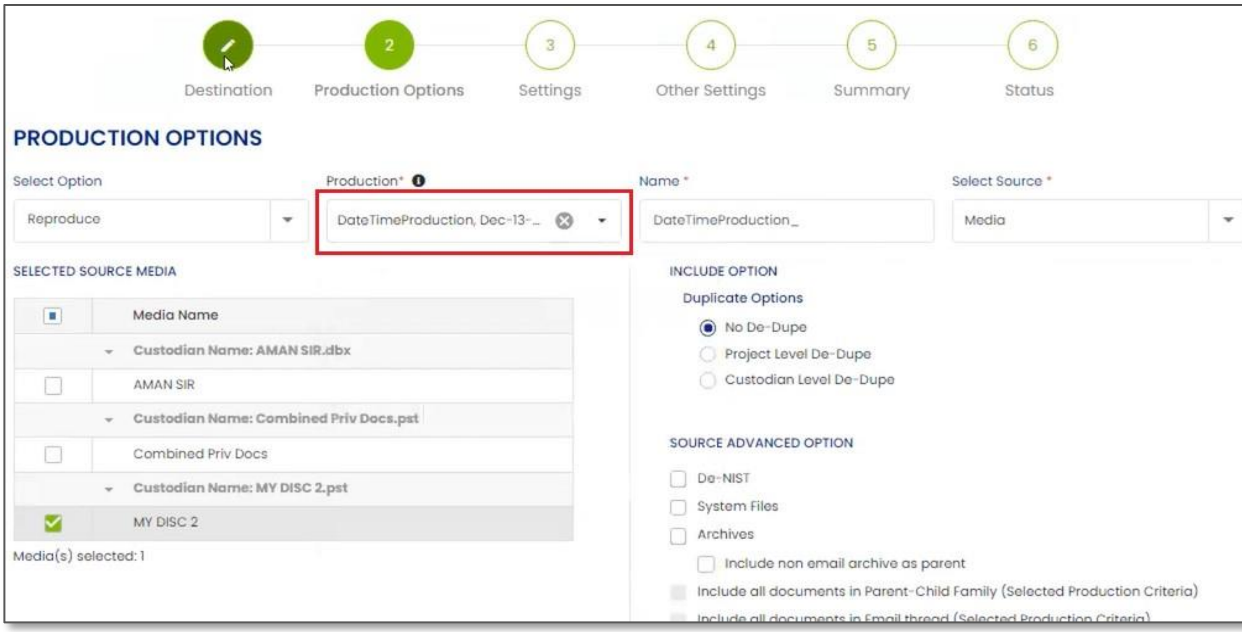
For multiple reproduce, you can select a combination of any production available in the Production Options drop-down menu.

1. In the Production Options page, select multiple productions from the Productions drop down menu. Use the check boxes of the productions to select multiple options.



The workspaces where the export has already been done for selected productions, those workspaces cannot be used for multiple reproduction. The following message appears when navigated to summary:

After multiple productions are selected, they appear in the production field as shown below:



9. In the Settings tab, ensure you have done the field mapping of the Venio and the relativity fields. When all the details are entered properly, click the Summary tab.