

Administrator's Guide to DiscoveryPartner

Welcome to DiscoveryPartner ("DP"). This guide for DP Administrators details how to create roles (security groups), manage tags, set up new users and more admin functions.

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Roles (Security Groups)

Roles determine the right to access, edit and otherwise use various features in DP. **Roles** function like security groups in a Windows operating system. Prior to adding users, you must create at least one **Role**.

Each user must be associated with a **Role**, which functions like a security group. Groups of users may be assigned to a role to ensure group members have the same rights and permissions. A role may have only one user, allowing you to create custom roles. Examples of typical Roles:

- **Site Admin:** This is for administrators with full site privileges including the ability to add or remove users. You can create other admin type roles that have specific (or fewer) site administration permissions.
- **Reviewers:** Users assigned to a Reviewer role are typically granted access to the fields and tags needed for their assignments.

Roles are flexible and may vary with different sites either by name or permission levels.

Create a New Role

To create a new role, open the **Roles** page:

• On the left nav, click **Administration** > **Roles**. On the **Roles** page click the **New Role** button to open this form.

🏦 Roles		New Role
1-10 of 10 Results		Filter By Nam
Name	Description	Action
01MerlinUserAdmin	This is for Merlin Users	
02EvaluationSiteUsers	For users testing the site	C 💼
03SeniorReviewer		ū
04JuniorReviewer		() ö

• Click the **New Role** button to open the **Create Role** window. From here, configure the role:



Role Name *	Enter Role Name			Description	Enter the Description	
Lo Permissions	🚑 Fields & Tags		Results Page	Review Page	🛎 Family View	🗮 Cluster View
Choose View and Edit Perm	piggions for this Polo					
choose view and Edit Felli	hissions for this kole					
Edit				View Only		
Available	Q Search	Selected	Q Search	Available	Q Search	Selected Q Search
Analyze-Edit	**			AllUsersActivity-View	30	
BulkUpdate	33			AllUsersJobs-View	>>	
Document-Upload	33			Analyze-View	*	
FieldsAdmin-Edit	>>			ClientAPI-Access	>>	
Folder-Edit	>>			Dashboard-View	>>	
Macros-Edit	>>			Download-Access	39	
ProductionFolder-Edit	>>			FieldsAdmin-View	» »	
RedactionReason-Edit	>>			Folder-View	>>	
ReviewAdmin	»			JobMonitor-Access	»	
ReviewProject-Edit	35			Macros-View	33	
Role-Edit	33			ProductionFolder-View	>>	
SavedSearch-Edit	>>			RedactionReason-View	>>	
TagFamily-Changeable	>>			ReviewProject-View	33	
TagFamily-NonChangeable	39			Role-View	33	
Tags-Edit	33			SavedSearch-View	**	
Tags Admin_Edit	22			Sherlock-Access	>>	

- 1. Type a Role Name and provide a Description (optional).
- 2. Select the permissions to be associated with the new role using the **Permissions, Fields** & Tags, Results Page, Review Page, and Family View tabs.
- 3. Click **Save** to save your work as you move through the various tabs.
- 4. Click **Save & Close** after all permissions and other options are assigned to the new role.

Edit a Role

- 1. Click on a role you want to edit
- 2. Use the tabs to move between configuration windows: **Permissions**, **Fields & Tags**, **Results Page**, **Review Page**, **Family View**, **Dashboard**.

Clone a Role

To assist administrators, new roles may be created by cloning an existing role. This helps when you want to create a new role with similar but not identical permissions. For example, you may have several review groups but want to give each group access to different tags.

To clone a an existing role:

- 1. Click on the **copy** icon (\Box) under the Action menu for the role you want to clone.
- 2. Enter the **Name** and **Description** (optional) on the pop-up. (The cloned role may be referred to as Review Team 1, Review Team 2...., etc.)
- 3. Change the role permission by following the steps in the *Edit a Role* section.

Delete a Role

- 1. Click on the trash can icon for the role you want to delete.
- 2. Click **Delete** on the pop-up window to verify

Note A role cannot be deleted if one or more users are assigned to that role.



Role Configuration

Permissions

Permissions govern access to the features and functions on the site and are controlled on the **Role** level. For example, **Users-Edit** allows the user to add, delete and manage user rights. **User-View** allows the user to see other users on the site but not to modify information about them or change their permissions.

Note

- Unless the Admin grants a specific permission to the **Role**, that feature will not be available.
- As you select an **Edit** permission, it is removed from the **View** list, eliminating the possibility of permission conflicts.
- Many functions are limited to **View** permissions.

Here is a list of available permissions with an explanation of each:

Edit Permissions

- **BulkUpdate:** Allows the user to update tag values for multiple documents from the results page.
- **Document-Upload**: Allows the user to use load files to upload documents to the site.
- FieldAdmin-Edit: Allows the user to view and edit the Fields page (typically restricted to Merlin Support only).
- Folder-Edit: Allows the user to create, share, edit and delete folders.
- ProductionFolder- Edit: Allows the user to create, edit and delete production folders.
- **RedactionReason-Edit**: Allows the user to add or edit redaction reasons.
- **ReviewProject-Edit:** Allows the user to create or edit a review project.
- Role-Edit: Allows the user to create, edit and delete roles (security groups).
- **SavedSearch-Edit:** Allows the user to create, edit and delete saved searches.
- TagFamily-Changeable: Sets Tag Family to on but allows it to be turned off.
- TagFamily-NonChangeable: Sets Tag Family to on and doesn't allow it to be turned off.
- **Tags-Edit:** Allows the user to add or change tag values on the review page.
- **TagAdmin-Edit:** Allows the user to determine which tag values will appear on the review page..
- User-Edit: Allows the user to create, edit and delete other users on the site.



View Permissions

- AllUsersActivity-View: Allows the user to see the activity of other users.
- **AllUsersJobs-View:** Allows the user to see jobs requested by other users (rather than only personal requests)
- ClientAPI-Access: Allows the user to access custom created APIs into DP.
- Dashboard-View: Allows the user to view the Dashboard.
- **Download-Access:** Allows the user to download documents.
- FieldsAdmin-View: Allows the user to view but not modify field information.
- **Folder-View:** Allows the user to view but not add to or edit folders.
- JobMonitor-Access: Allows the user to access the job monitor link.
- **ProductionFolder-View:** Allows the user to view but not run or edit productions.
- RedactionReason-View: Allows the user to view redaction reasons.
- **ReviewProject-View:** allows the user to view review projects.
- **Role-View:** Allows the user to view role information.
- SavedSearch-View: Allows the user to view and use but not edit Saved Searches.
- Sherlock-Access: Allows the user to access Sherlock AI mode functions.
- TagsAdmin-View: Allows the user to view Tags.
- User-View: Allows users to view but not edit the users list.
- UserActivity-Access: Allows the user to view user activity.

Choose the appropriate combination of permissions for the **Role**.

Click **Save** before moving away from the tab.

Fields & Tags

Fields & Tags (controlled on the **Role** level) govern access to specific metadata **Fields** from the documents and **Tags** assigned to the review.



Role Name * Enter Rol	e Name		Description	Enter the Description		
Lo Permissions	🚣 Fields & Tags	Results Page	Review Page	📽 Family View		E Cluster View
Choose Fields and Tags available for th	nis Role		Tags			
Available C. Bearch Processing Finals Proce Day Control Budden Name Budden Name Trans Zine Trans Zine Trans Zine Ures Uptication	N Annu N Annu N Boc N Cord N Desc N Cord N Desc N Cord N Cord N Desc N Cord N Cord N Cord N Cord N For N For N Cord N C	cted Q Search chment Count or content Count or content Count content c	Available Confidential CreationTime CreationTime CreationTime CreationTime CreationTime FPGA ForFartherSiteView FreeformTaga Hothis Issues LastMoofficationTime LastMoofficationTime LastMoofficationTime Philyinge Phil	Search 9 	Selected	Q Search

There are numerous **Fields** and **Tags** available in DP; many are specific to the current document set. In most cases, you will want to select the **Fields** and **Tags** appropriate for your users rather than assigning all of them. Assign *only* the **Fields** and **Tags** that users in that **Role** will need, hiding those that will not be used. This will help make the site more user-friendly..

The chosen **Fields** and **Tags** will be available for search and may be displayed on the **Results Page** and **Review Page**. The remaining fields and tags will not be available to the user for search, tagging or viewing.

Important There are two key functions listed under **Fields** that *must* be included if you want users to be able to run text searches:

- **DocText** allows the user to run text searches.
- AnyText allows the user to run the more expansive AnyText searches.

Configure Fields and Tags for the Role

To select Fields or Tags individually:

• On the Fields & Tags window, click the arrow to the right of the desired field in the **Available** column. It will move to the **Selected** Column.

To select all the Fields and Tags for a Role (not recommended):

• Click the green arrow between the Available and Selected columns.

Important You must click **Save** before leaving a tab or your work will be lost.



Results Page

Role Name * Enter R	ole Name		Description	inter the Description	
20 Permissions	🚑 Fields & Tags	📋 Results Page	Review Page	🔹 Family View	E Cluster View
Grid View: Choose Fields and Tags (in	ncluding order) for display		Snippet View: Choose Fields and Click here to copy the Fields & Tags	Tags (including order) for display from grid view	
Available C Search Ant Paid Attachment Count Attachment Wris Autorn Beg Attachment Uris Box Deg Attachment Beg Control Box C Check No C Check No C Cannowni C Comvent C Control D Comvent C Control D Comvent C Control D Comvent C Control D Comvent	Belect	d (Q. Search	Available C. Snow Ann Paul Attachment Count Attachment Units Attachment Units Autor Bog Ontol Bog Ontol Bog Contol Bog Californi Time Co Creek No Caam Annt Commant Costadian	30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30	Nected Q Search

The **Results Page** layout configuration supports two views: **Grid View** and **Snippets View**. Each view serves a unique purpose and displays differently.

- Grid View displays the results in a table with an emphasis on the metadata.
- **Snippet View** displays the results in a list including text snippets (lines of text from the document) with search terms highlighted. After running a keyword search, this view gives you an idea of what kind of documents DP has identified and helps you understand the context in which the terms were used.

Note The Fields and Tags selected on the previous tab define the options for this tab.

Configure the Results Pages

To select Fields or Tags individually:

- On the **Results Page** window, click the arrow to the right of the desired field in the **Available** column. It will move to the **Selected** Column.
- Fields will display on the **Results Page** in the order they are selected.

To select all the Fields and Tags:

• Click the green arrow between the **Available** and **Selected** columns.

To reorder the Fields and Tags on the Results Page:

• Drag and drop your choices after they are in the **Selected** column.

To duplicate the Grid View selections to the Snippet View:

• Click Click here to copy the Fields & Tags from grid view.

Click **Save** before moving away from the tab.



Grid View

Here is a typical Grid View:

						_		_	
Q S	Search	(Manatee or Ma	natees) Refin	e					Found: 157,227 of 2,709,425 sea
Sort B	у	Relevance (Hig	h to Low)	~			Save Search Timeline Select View	Grid 🗸	K 1 of 5,241 pages
	× 1	Beg Control	Doc Date	From	То	Custodian	Subject	Issues	
	=	Bush710178	2004-09-23	Jeb Bush	Bunny Hanley (bunny.hanley@myflorida.com)	David, Meyer			
	*	Bush1762664	2003-04-06	Vira Confection er	kyle.bruce@myfloridahouse.com: speakerbyrd@ myfloridahouse.com: mayfield.stan@myfloridah ouse.com: jeb@myflorida.com	Patrick, Pitner	SAVE THE MANATEES		
		Bush348371	2001-01-05	wsb1@webtv.n et	Comments@FDXNews.com	Spitz, Kevin	++WEST INDIAN MANATEE++		
		Bush361162	2001-04-10	Marissa Garone	jeb@myflorida.com; gfcmail@gfc.state.fl.us	Spitz, Kevin	Please help the manatees		
		Bush1743045	2002-12-20	CAROLYN LOGA N-TAYLOR	'manatee@fws.gov'	Patrick, Pitner	Incidental Take Regulations		
		Bush366570	2001-02-15	Florida Governo r	'~*0Vanessa Bee0*~'	Ford, Daniella	RE: Florida Manatee Sanctuary Act of 1978		
	=	Bush1665245	2003-09-17	Scooteacha@ao Lcom	jonathan.bruce@co.manatee.fl.us	Jack, Farnandies	Please help		
	-	Bush707213	2004-08-18	Stsunny@aol.co m	Jeb Bush	Andrew, Chan	Please Don't Downlist Florida's Manatees		
	-	Bush1690243	2003-04-17	Jennifer Barker	kyle.bruce@myfloridahouse.com: speakerbyrd@ myfloridahouse.com: mayfield.stan@myfloridah ouse.com: jeb@myflorida.com	Patrick, Pitner	SAVE THE MANATEE CLUB		
		Bush607449	2002-09-20	Seamunkey124 @aol.com	commissioners@fwc.state.fl.us: jeb@myflorida.c om	Andrew. Chan	Fwd: Protect our Manateesl		
		Bush283469	2001-04-01	Karen Ciemniec ki	gfcmail@gfc.state.fl.us	Spitz, Kevin	manatee protection		
		Bush498224	2002-02-13	AriShark@aoLc om	undisclosed-recipients	Ford, Daniella	Manatee protection	Liability	
		Bush424257	2001-10-18	Matt & Lisa Jen	gfcmail@gfc.state.fl.us; jeb@myflorida.com	Ford, Daniella	MANATEE PROTECTION		

Snippets View

Here is a typical **Snippets View** for the same search:

Q Search (Manatee or Manatees) Refine	Found: 157,227 of 2,709,425 searched
Save Search Save Search	Timeline Select View: Snippets V K 🚺 of 5,241 pages 🗲 😕
Beg Control: Bush/10178 Doc Date: 2004-09-23 From: Jeb Bush To: Bunny Hanley (burny hanley Custodian: David, Meyer Notes: Manatee Protection, Please save the manatees, Manatees, manatee protection?: manatee protection plan. Save the Manatees, instances,	
Beg Control: Bush1762664 Doc Date: 2003-04-06 From: Vira Conflectioner -bug_a.pet. Tor kyla.bruce@myffordahouse.c. Custodian: Patrick, Pitner Notes: Marattee_ outerach and information The review of manattee signage plans for boat speed zones. The tailvage and necessary of dead manattee. Tracking and monitoring manattee migration and oversign of manattee signage plans for boat speed zones. The tailvage and necessary of dead manattee. Tracking and monitoring manattee migration and oversign of manattee signage plans for boat speed zones. Tracking and monitoring manattee migration and behavior Assessing the physical condition on (or region of manattee) statewide. Tracking and monitoring manattee migration and behavior Assessing the physical condition of the region for to india and boaters. To be speed boaters that kill innocent manutees. MANATEES ARE MORE IMPORTANT THAN STUPID SPEED BOATERS. View Tatt [2]	
Beg Control: Bush348371 i Doc Date: 2001-01-05 i From: wsb1@webtv.net i To: Comments@FDXNews.com i Custodian: Spitz, Kevin i Notes: Monatees population today is about 2700 (7). Manufee gestation is 12 to 13 months, with birth rate three to five years. Loastees, were exclassed endongered in 1007. Manufee gestation is 12 to 13 months, with birth rate three to five years. Very free poople want to kill Manufeer vere destande indongered in 1007. Manufee destande postation in 1072. Manufeer, equilation in Collier County started in 1095. Very free poople want to kill Manufeer vere destande indongered in 1007. Manufee destits DECLINED substantially statewide, according to compiled data in "Manufee" Mortality in Plorda View Text [2]	



Review Page

Role Name * Enter Role	e Name			Description	Enter the Description		
Lo Permissions	🌲 Fields & Tags	Results Page		2 Review Page	🔹 Family View		Eluster View
Choose Fields and Tags (including orde Click here to copy the Fields & Tags from a Fields	r) for display on the Revie grid view	w Page		Tags			
Available Q Search	2	Delected Q Search II AntiPaid II AntiPaid II Antachment Count II Equ Control II Equ Control II Enc Control II Enc Control II Creck No II Check No II Court Antel II Creck No II Court Antel II Enc III Check No III Court Antel III Enc III Check No III Court Antel III Enc IIII Check No III Court Antel III Enc IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8	Available C	earch	Selected II Reposite II Issus II Privileged II Notes	Q Search

The **Review Page** layout configuration defines which **Fields** and **Tags** will be displayed on the **Review Page** for that role.

Configure the Review Page

To select Fields or Tags individually:

- On the **Review Page** window, click the arrow to the right of the desired field in the **Available** column. It will move to the **Selected** Column.
- Fields will display on the **Review Page** in the order they are selected.

To select all the Fields and Tags:

• Click the green arrow between the Available and Selected columns.

To reorder the **Fields** and **Tags** on the **Review Page**:

• Drag and drop your choices after they are in the **Selected** column.

To duplicate the Grid View selections from the Results Page to the Review Page:

• Click Click here to copy the Fields & Tags from grid view.

Click **Save** before moving away from the tab.

Family View

Family View displays information about all members within a document family: the parent email and the child attachments. ZIP or RAR files attached to an email message are typically extracted and the individual files are shown as children of the parent email.



Here is a typical Family View:

Discovery Partner	Disco	veryPartner	Evaluation Site - Rev	iew					Help Guides 🕐 Kathy Hogy 🗸
Fields <	A Native	Text	ᡝᆵ REDO / / í 語 Retr /	í≣ Rev \				Download - Copy Macros Family O 🧰 🕼 🕼 🕼 🕼 🕼 🕼 🕼 🕼 🕼 🖓 Tog Family 😑	Tags >
Beg Control ENRON000000105	Туре	Doc Id	Beg Control	Doc Date	From	То	Custodian		(Send to Sherlock*)
2010-06-17	(<u> </u>	1964884	ENRC/N000000010!	2010-06-17	Phillip K Allen	stanley.horton ; dm	allen-p		Privileged
From	U	1964889	ENRON000000101				allen-p		O Potentially Privileged
	121 -	1964892	ENRON00000010:				allen-p		Atty Client Work Product
stanley.horton <stanley.horton@enron.com></stanley.horton@enron.com>	£3⊨	1964894	ENRON000000101				allen-p		Not Privileged
dmccarty <dmccarty@enron.com></dmccarty@enron.com>	8	1964899	ENRON000000105				allen-p		Confidential
Custodian	0	1964903	ENRON000000110				allen-p		Non Confidential
Sile Extension								🔣 🤇 Page (1) of (1) 🔰 😣	Not Reviewed Potentially Confidential
msg	View	Q Search 🕅	Redact						Issues
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Linon									Fraud
									Damages
		To: star	lev.horton[stanle	v.horton@	enron.com]: d	mccartv[dmcc	artv@enror	Lcom]	Tech_QC
		From: I	Phillip K Allen	,	,				Notes
		Sent: M	fon 5/7/2001 11:2	3:00 PM					
		Subject	: California Sumr	nary					
		Receive	d: Mon 5/7/2001	11:23:00 H	PM				
		Attachr	nent: California S	Summary.d	oc				
		Attachr	nent: California S	Summary F	lus.doc				
			Fe	orwarded	l by Phillip	K Allen/HC	OU/ECT	on 05/07/2001 11:22 AM	

Configure the Family Page

To select Fields or Tags individually:

- On the **Family View** window, click the arrow to the right of the desired field in the **Available** column. It will move to the **Selected** Column.
- Fields will display on the Family View in the order they are selected.

To select all the Fields and Tags:

• Click the green arrow between the Available and Selected columns.

To reorder the Fields and Tags in the Family View:

• Drag and drop your choices after they are in the **Selected** column.

To duplicate the **Grid View** selections from the **Results Page** to the **Family View**:

• Click Click here to copy the Fields & Tags from grid view.

To configure the **Sort Details**:

- 1. Select a field from the **Sort By** drop down.
- 2. Select either **Asc**ending or **Des**cending order from the **Order By** drop down.

Click **Save** before moving away from the tab.



Role Name * Enter Role Name				Description	Enter the Description	
Lo Permissions	💄 Fields & Tags	💼 Results Page		Review Page	😩 Family View	E Cluster View
Choose Fields and Tags (including of Click here to copy the Fields & Tags fro Fields and Tags	rder) for display on Fami m grid view	ly View		Sort Details		
Available Q Search		Selected Q Search	1	Sort By	Beg Control	\$
Amt Paid		II Attachment Count	**			
Attachment UPIs	>>			Order By	Asc	٥
Beg Attachment	*	# Attachment Names	**			
Box	**	II Author	**			
CallStartTime	>>	II BCC	~			
Check No	*	II cc.	**			
Claim Amt	»					
Comment	» «	11 Custodian	**			
Date Created	*	II Description	**			
Date Last Modified	*	II Doc Date	**			
Date Last Printed	>>	H August				
DeDuped Custodians	**	III DOCIO	**			
Department	*	II Subject	**			
Description1	**	II Beg Control	**			
Domain BCC	**					

Cluster View

Cluster View displays the next 50 (or fewer) documents in a view that is similar to a **Snippets View**. These clusters are based on similar or near similar content.

Discovery Partner [*] 0 1 🕐 0 Percent Relevant: 100% Last Ten Docs: 100%	Options 👻
Control Cover Cover	Tags >
Cluster 1 (6 docs) Cluster 1 (6 docs) Cluster 1 dols calfornia summary (phillip kalen) version of the california set of graphs jay returneyer additional california Cluster Labels: california summary (phillip kalen) version of the california set of graphs jay returneyer additional california Cluster Labels: california summary (phillip kalen) version of the california set of graphs jay returneyer additional california Cluster Labels: california summary (phillip kalen) version of the california set of graphs jay returneyer additional california Cluster Labels: california summary (phillip kalen) version of the california set of graphs jay returneyer additional california construction of the california summary (phillip kalen) version of the california set of graphs jay returneyer additional california set of graphs jay returneyer j	Submit Judgments Privileged Atty Clent Work Product Matt Privileged Confidential Non Confidential Nat Reinferd Patentially Confidential
Forwardel by Paling & Aller (Hod / ECT on 05/07/2001 11:22 AM	Issues © invironmental Manates Protection Preud Lability Demages Tech_QC Notes
Beg Control: ENRON00000001710 I Doc Date: 2010-06-17 From: Phillip K Allen + Phillip K Allen + To: Stanley Horton -stanley/horton@erron.com:; dmccart/@erron.com:; dmccart/@erron.com:; dmccart/@erron.com; dmccart/@erron.	

Configure the Cluster View

To select Fields or Tags individually:

- On the **Family View** window, click the arrow to the right of the desired field in the **Available** column. It will move to the **Selected** Column.
- Fields will display on the **Cluster View** in the order they are selected.



To select all the Fields and Tags:

• Click the green arrow between the **Available** and **Selected** columns.

To reorder the **Fields** and **Tags** in the **Cluster View**:

• Drag and drop your choices after they are in the **Selected** column.

To duplicate the Grid View selections from the Results Page to the Cluster View:

• Click Click here to copy the Fields & Tags from grid view.

To configure the **Sort Details**:

• Select a field from the **DP Results Count** (the number or results to be displayed) from the drop down

Click **Save** before moving away from the tab.

Role Name * Enter Role	Name			Description	Enter the Description	
20 Permissions	🌲 Fields & Tags	Results Page		Review Page	🏝 Family View	E Cluster View
Choose Fields and Tags (including orde Click here to copy the Fields & Tags from s	r) for display on Cluster V pid view	iew		Choose count for retrive of	documents from sherlock view	
Fields and Tags				Sherlock Result Count		
Arafable Q Smarrh	22	Selected Search If Antra Pad Antrachment Court If Antrachment Court If Antrachment Court If Antrachment UPIs If Antrachment If Big Attachment If Big Attachment If Big Attachment If Big Control If Big Control If Collocattime If Collocattime If Collocattime	8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8	No of Documents	30	

Dashboard Setup

Roles determine the associated **Dashboard** that appears when a user logs into the site

Note The **Dashboard** tab will appear once the role is created. If a role does not have an associated Dashboard, users in that Role will not see a **Dashboard** link and will be directed to the **Search** page after logging into the site.

Here is the view of a typical Dashboard:





The **Dashboard** layout consists of nine cards arrayed in three columns and up to three rows. Each card holds one of the reports saved to the site (see the **Reports** link in the menu on the left of the **Navigation** panel). Select a report from the dropdown for each of the row/column combinations.

Click Save before moving away from the tab.

Discovery Partner	DiscoveryPartne	er Evaluation Site							Help Guides 🕐	Kathy Hogy
3	a Edit Role	ç								
A Dashboard	Role Name * 01Evaluation		ationSiteUsers		Description		For users testing the site			
Q Find/Search	🌲 Permis	sions 🔒 Fi	elds & Tags 💼 Res	ults Page	Review Page	🖀 Family	View	E Cluster View	Dashboard	
Analyze	Configure	Reports to display on the E	ashboard							
Review	Row	Column	Report							
P Produce	Row1	Column1	Select Report			¢				
Administration	Row1	Column2	Select Report			¢				
Users	Row1	Column3	Select Report			+				
Roles	Row2	Column1 Column2	Select Report			•				
Redaction Reasons	Row2	Column3	Select Report			\$				
Macro Groups	Row3	Column1	Select Report			\$				
Fields	Row3	Column2	Select Report			÷				
Field Mapping Upload Documents	Row3	Column3	Select Report			÷				
Upload Monitor										
Job Monitor								Delete O Cancel	📓 Save 📓	Save & Close

Tag Values

An Administrator determines which Tag Values are available to the user or group. Below is the Create or Edit Tag Values layout:



ag	Tag Values
Confidential Document Status For Further Review FreeformTags Hotfile Issues Privileged Type Privileged Privileged Privileged Terms Produced Redacted Responsive Terms	Add multiple tag values with a comma separator between each.
Reviewed	Save Save Save Save Save Save Save Save

Click on each tag to view its existing values, if any.

To add a Tag Value:

- 1. In the **Tag Values** textbox enter the value(s) separated by commas.
- 2. Click the +Add Tag Values button.

Tag Values may be deleted by selecting one or more values using CTRL (Windows) or CMD (Apple) click. Click the Delete Tag Value button to delete the highlighted Tag Values.

If the selected Tag Values were used to tag existing documents on your project site, you will receive an error message. If you want to delete the Tag Value as an option for later use on the site, simply perform a search for the records associated with the Tag Values to be deleted and associate the documents with another Tag Value.

Redaction Reasons

An Administrator can determine reasons for redactions based on the needs of the matter. The Redaction Reason layout appears as below:

🕼 Redaction Reason		New Redaction Reason
1-4 of 4 Results		
Redaction Reason	Description	Action
Atty-Client		Û
Work Product		ů.
PHI	Personal Health Information	â
Confidential		â

The redaction reasons will appear as options when you redact files. Redactions may be added or deleted as appropriate. To add a redaction reason, click the **New Redaction Reason** button. To delete a redaction reason, click the Redaction Reason and select the trash can icon in the Action menu to delete it.



Manage Users

To create a new user, open the **Users** page:

- 1. On the left nav, click **Administration > Users**.
- 2. On the Users page click the New User button to open this form.

First Name *	John	83	Address	Enter Address	
Last Name *	Smith			1	
Email *	JSmith@merlin.tech		City	Enter City	
Phone	303-111-1234		State / Regio	Enter State / Region	
User Name *	JSmith		Country	United States of America	
Password *	••••••	Ø	Postal Code	Enter Postal Code	
Confirm Password *	·····	8			
Role *	Please select role	\$	Comments	Enter Comments	
Active	✓ Yes No			1	
				🛇 Cancel	Save

Required fields are noted with a red asterisk *.

Note Although phone numbers are not required, they are helpful if a Merlin team member needs to reach out to the user to answer questions or provide support.

Note Users can only be assigned to one role at a time but can be moved to other roles as needed.