

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.

Table of Contents (linked)

Roles (Security Groups)	3
Create a New Role	3
Edit a Role	4
Clone a Role	4
Delete a Role	4
Role Configuration	5
Permissions	5
Edit Permissions	5
View Permissions	6
Fields & Tags	6
Configure Fields and Tags for the Role	7
Results Page	8
Configure the Results Pages	8
Grid View	9
Snippets View	9
Review Page	10
Configure the Review Page	10
Family View	11
Configure the Family Page	12
Cluster View	12
Configure the Cluster View	13
Dashboard Setup	13
Tag Values	14
Redaction Reasons	15
Managing Users	15

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:

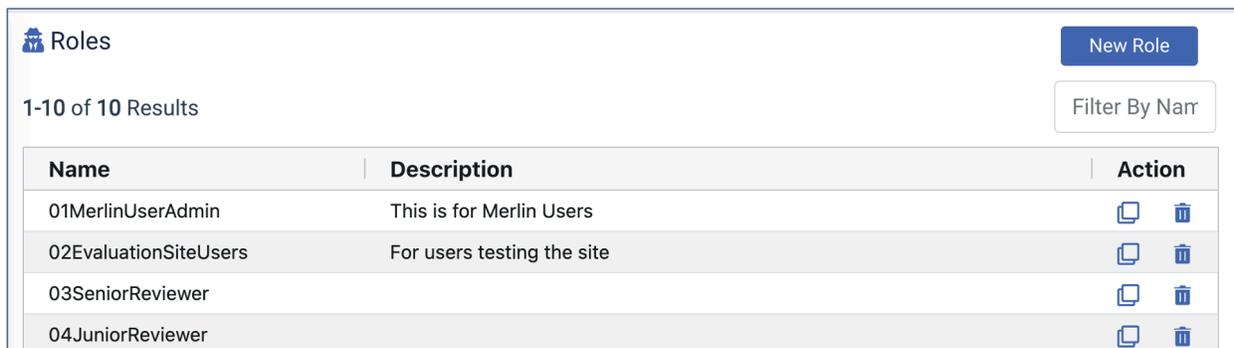
- **Site Admin:** This is for administrators with full site privileges including the ability to add or remove users. You can create other admin type roles that have specific (or fewer) site administration permissions.
- **Reviewers:** Users assigned to a Reviewer role are typically granted access to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

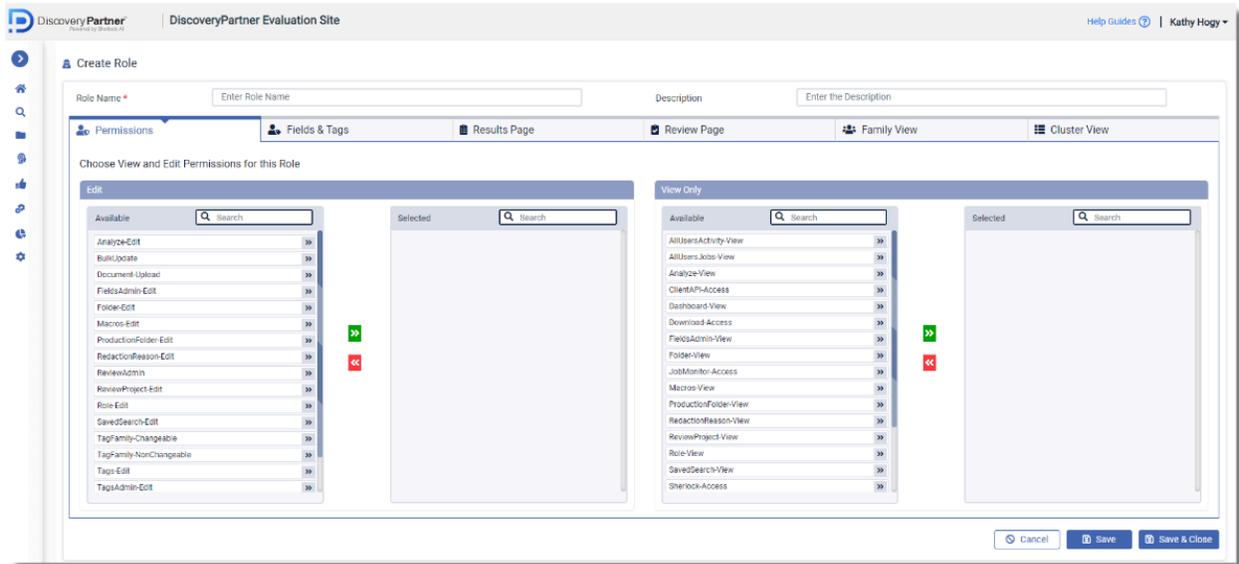
To create a new role, open the **Roles** page:

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



Name	Description	Action
01MerlinUserAdmin	This is for Merlin Users	 
02EvaluationSiteUsers	For users testing the site	 
03SeniorReviewer		 
04JuniorReviewer		 

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



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 () 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

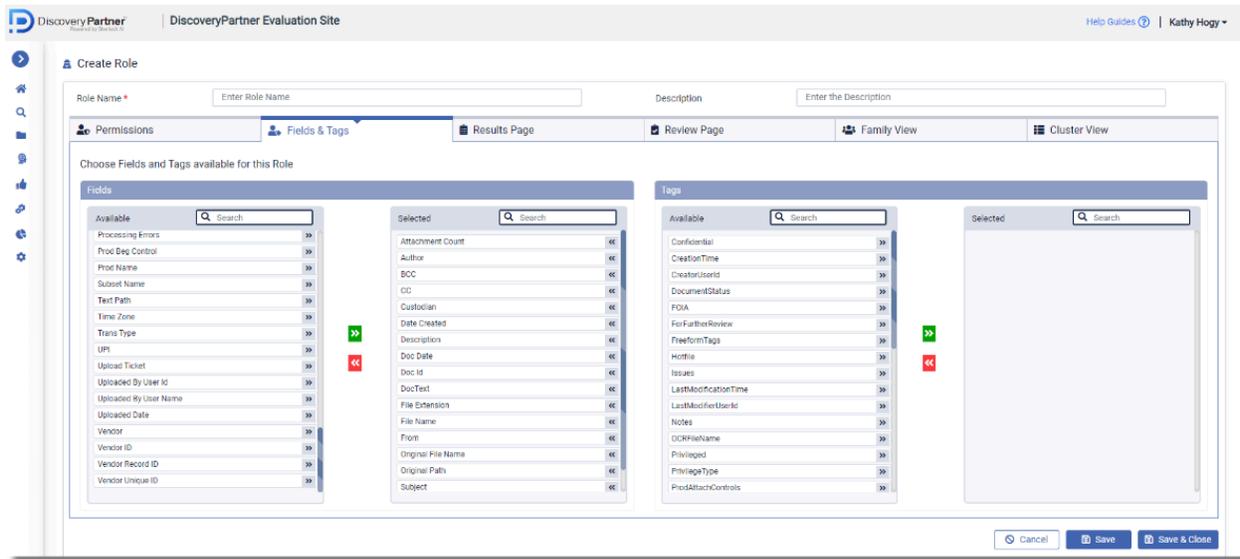
- **AllUsersActivity-View:** Allows the user to see the activity of other users.
- **AllUsersJobs-View:** Allows the user to see jobs requested by other users (rather than only personal requests)
- **ClientAPI-Access:** Allows the user to access custom created APIs into DP.
- **Dashboard-View:** Allows 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.



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:

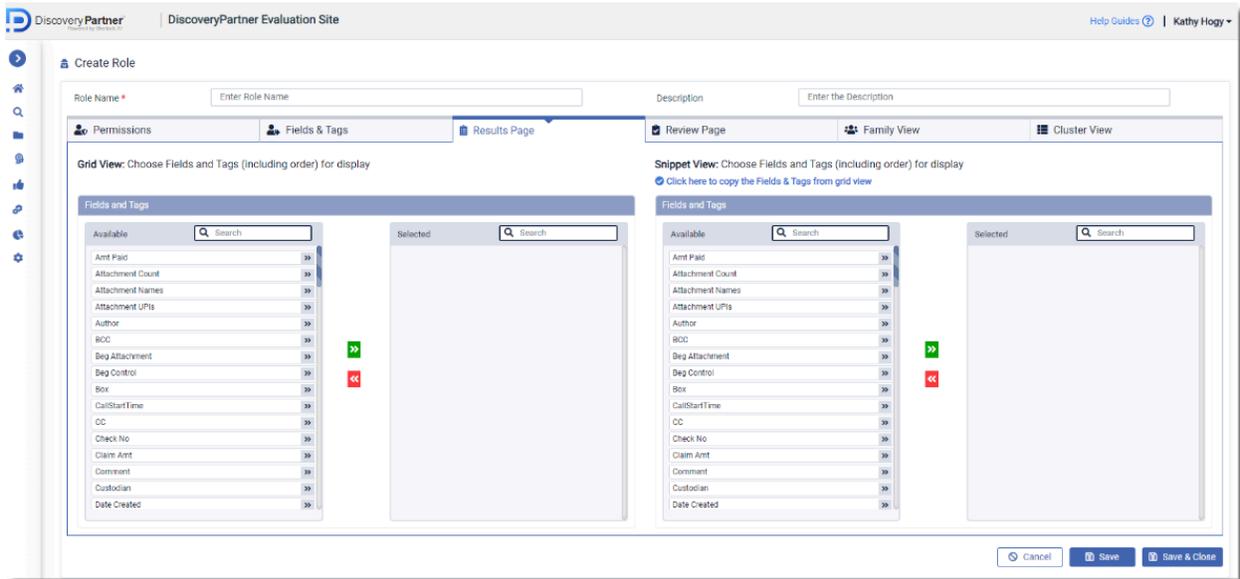
- On the Fields & Tags window, click the arrow to the right of the desired field in the **Available** column. It will move to the **Selected** Column.

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



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.

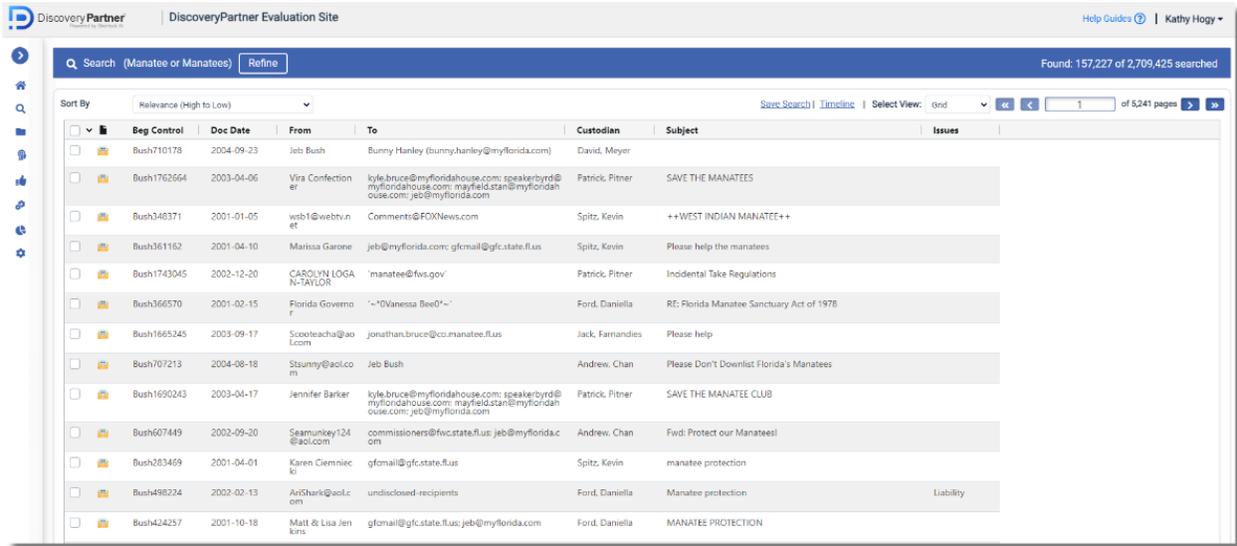
To duplicate the Grid View selections to the Snippet View:

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

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

Grid View

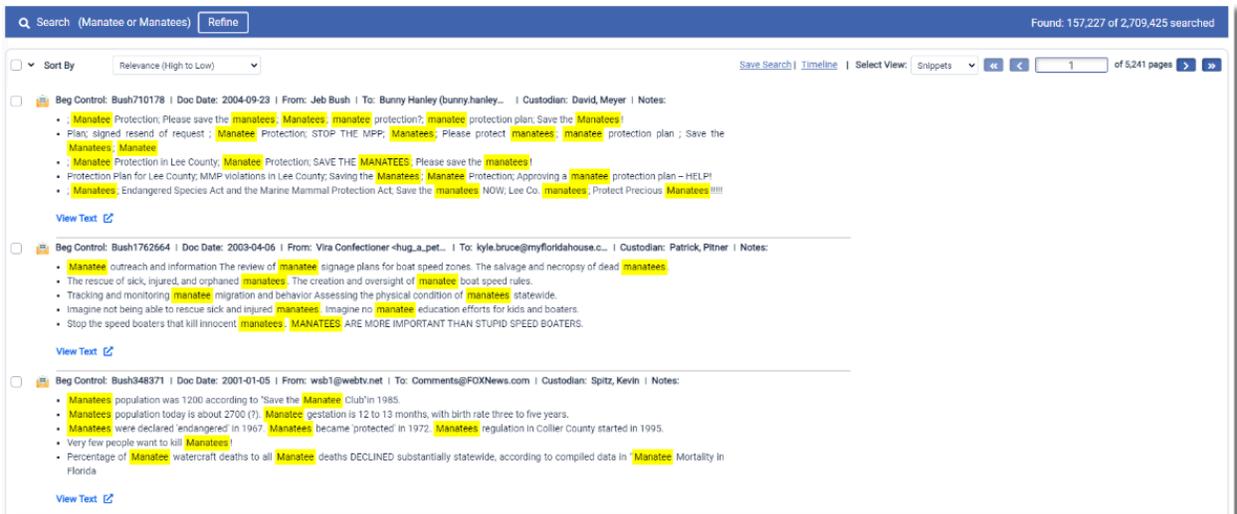
Here is a typical **Grid View**:



Beg Control	Doc Date	From	To	Custodian	Subject	Issues
Bush710178	2004-09-23	Jeb Bush	Bunny Hanley (bunny.hanley@myflorida.com)	David, Meyer		
Bush1762664	2003-04-06	Vira Confectioner	kyle.bruce@myfloridahouse.com; speakerbyrd@myfloridahouse.com; mayfield.stan@myfloridahouse.com; jeb@myflorida.com	Patrick, Pitner	SAVE THE MANATEES	
Bush348371	2001-01-05	web1@webtv.net	Comments@FOXNews.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 LOGAN-TAYLOR	'manatee@fws.gov'	Patrick, Pitner	Incidental Take Regulations	
Bush366570	2001-02-15	Florida Governor	'- "Vanessa Bee0"-'	Ford, Daniella	RE: Florida Manatee Sanctuary Act of 1978	
Bush1665245	2003-09-17	Scoteacha@aol.com	jonathan.bruce@co.manatee.fl.us	Jack, Farnandes	Please help	
Bush707213	2004-08-18	Stanny@aol.com	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@myfloridahouse.com; jeb@myflorida.com	Patrick, Pitner	SAVE THE MANATEE CLUB	
Bush607449	2002-09-20	Seamunkey124@aol.com	commissioners@fwc.state.fl.us; jeb@myfloridahouse.com	Andrew, Chan	Fwd: Protect our Manatees!	
Bush283469	2001-04-01	Karen Ciemnielik	gfcmail@gfc.state.fl.us	Spitz, Kevin	manatee protection	
Bush498224	2002-02-13	ArtShark@aol.com	undisclosed-recipients	Ford, Daniella	Manatee protection	Liability
Bush424257	2001-10-18	Matt & Lisa Jenkins	gfcmail@gfc.state.fl.us; jeb@myflorida.com	Ford, Daniella	MANATEE PROTECTION	

Snippets View

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



Search: (Manatee or Manatees) Refine Found: 157,227 of 2,709,425 searched

Sort By: Relevance (High to Low) Save Search | Timeline | Select View: Snippets 1 of 5,241 pages

Beg Control: Bush710178 | **Doc Date:** 2004-09-23 | **From:** Jeb Bush | **To:** Bunny Hanley (bunny.hanley... | **Custodian:** David, Meyer | **Notes:**

- **Manatee** Protection. Please save the **manatees**, **Manatees**, **manatee** protection?; **manatee** protection plan; Save the **Manatees**
- **Plan**; signed resend of request ; **Manatee** Protection; STOP THE MPP; **Manatees**; Please protect **manatees**; **manatee** protection plan ; Save the **Manatees**; **Manatee**
- **Manatee** Protection in Lee County; **Manatee** Protection; SAVE THE **MANATEES**; Please save the **manatees**!
- **Protection Plan** for Lee County; MPP violations in Lee County; Saving the **Manatees**; **Manatee** Protection; Approving a **manatee** protection plan -- HELP!
- **Manatees**; Endangered Species Act and the Marine Mammal Protection Act; Save the **manatees** NOW; Lee Co. **manatees**; Protect Precious **Manatees** !!!

[View Text](#)

Beg Control: Bush1762664 | **Doc Date:** 2003-04-06 | **From:** Vira Confectioner -hug_a.pet... | **To:** kyle.bruce@myfloridahouse.c... | **Custodian:** Patrick, Pitner | **Notes:**

- **Manatee** outreach and information The review of **manatee** signage plans for boat speed zones. The salvage and necropsy of dead **manatees**.
- The rescue of sick, injured, and orphaned **manatees**. The creation and oversight of **manatee** boat speed rules.
- Tracking and monitoring **manatee** migration and behavior Assessing the physical condition of **manatees** statewide.
- Imagine not being able to rescue sick and injured **manatees**. Imagine no **manatee** education efforts for kids and boaters.
- Stop the speed boaters that kill innocent **manatees** **MANATEES** ARE MORE IMPORTANT THAN STUPID SPEED BOATERS.

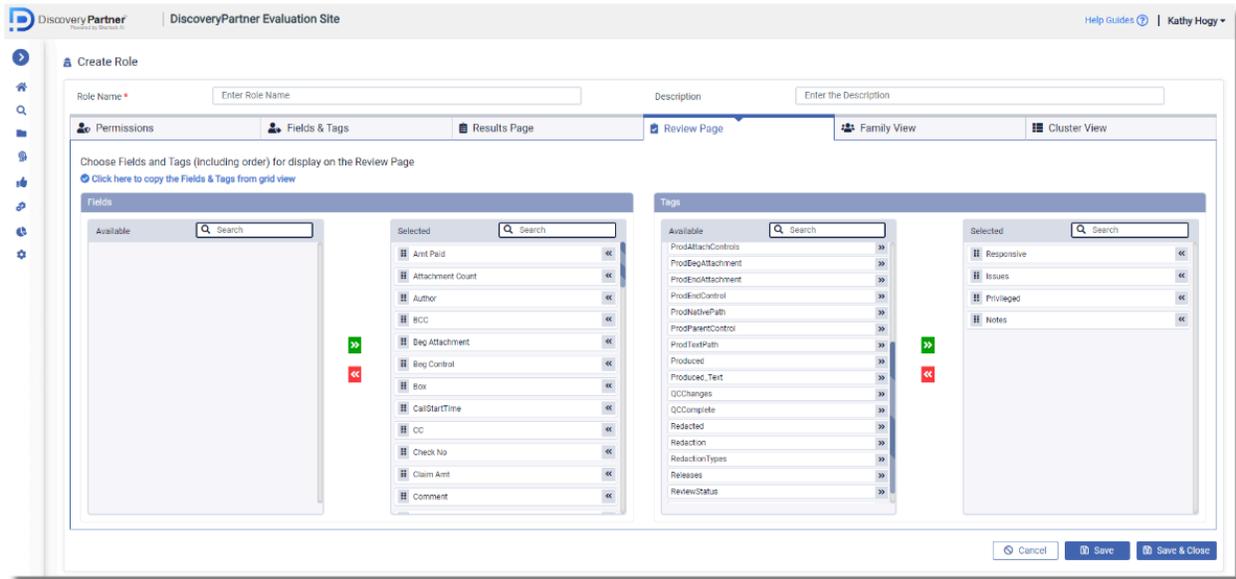
[View Text](#)

Beg Control: Bush348371 | **Doc Date:** 2001-01-05 | **From:** web1@webtv.net | **To:** Comments@FOXNews.com | **Custodian:** Spitz, Kevin | **Notes:**

- **Manatees** population was 1200 according to 'Save the **Manatee** Club' in 1985.
- **Manatees** population today is about 2700 (?) **Manatee** gestation is 12 to 13 months, with birth rate three to five years.
- **Manatees** were declared 'endangered' in 1967. **Manatees** became 'protected' in 1972. **Manatees** regulation in Collier County started in 1995.
- Very few people want to kill **Manatees**.
- Percentage of **Manatee** watercraft deaths to all **Manatee** deaths DECLINED substantially statewide, according to compiled data in **Manatee** Mortality in Florida

[View Text](#)

Review Page



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**:

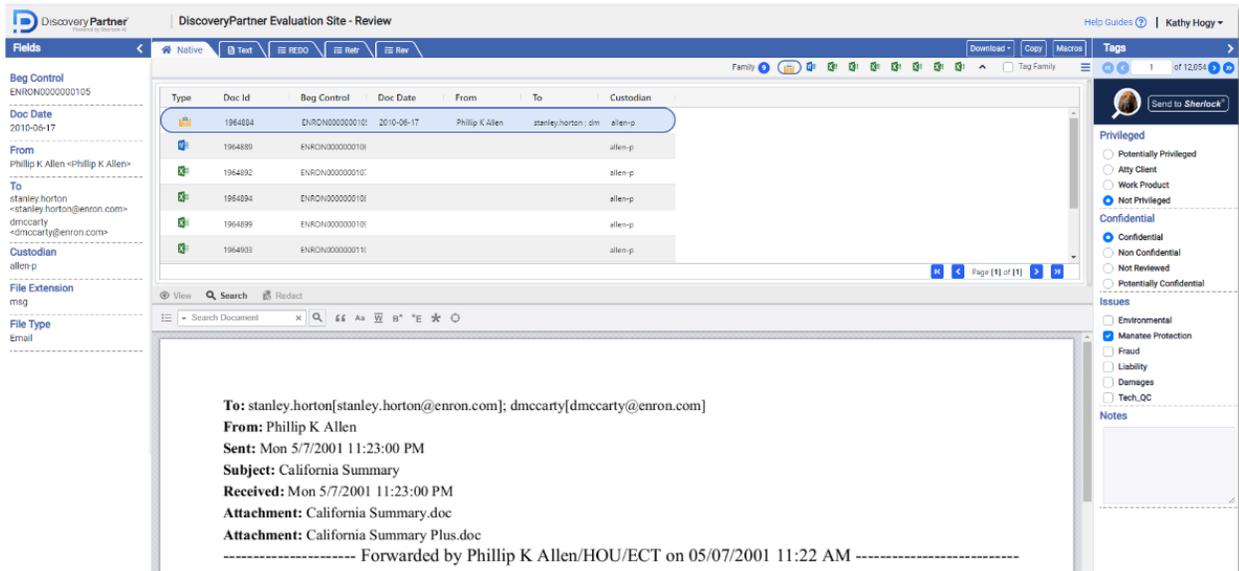
- Click **Click here to copy the Fields & Tags from grid view**.

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**:



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.

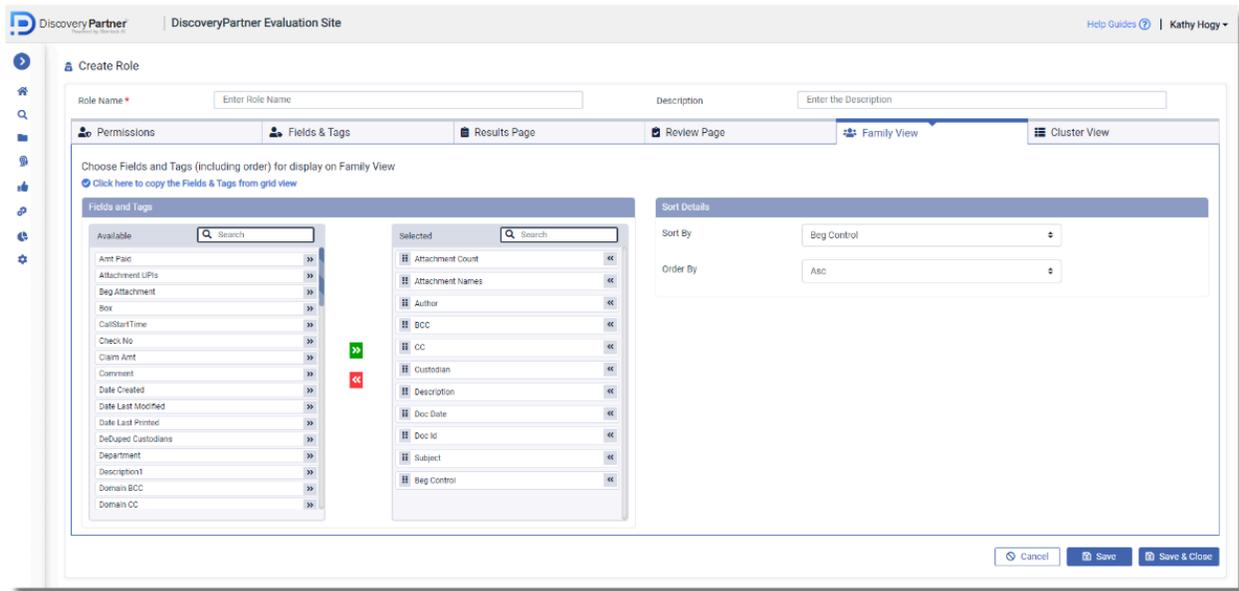
To duplicate the **Grid View** selections from the **Results Page** to the **Family View**:

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

To configure the **Sort Details**:

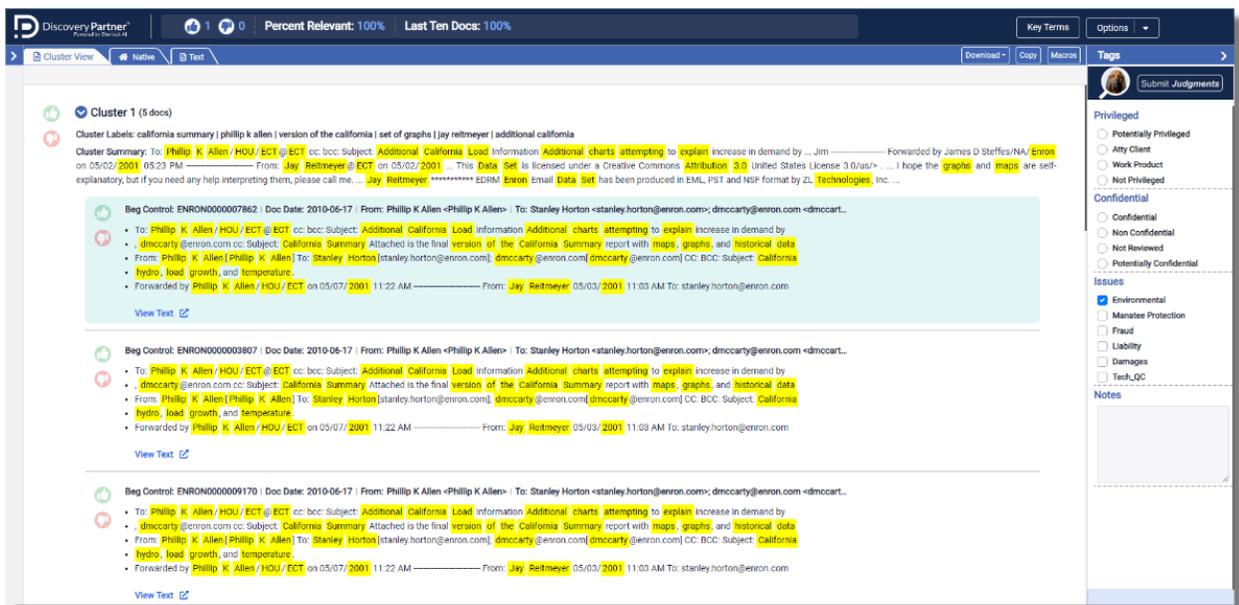
1. Select a field from the **Sort By** drop down.
2. Select either **Ascending** or **Descending** order from the **Order By** drop down.

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



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.



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.

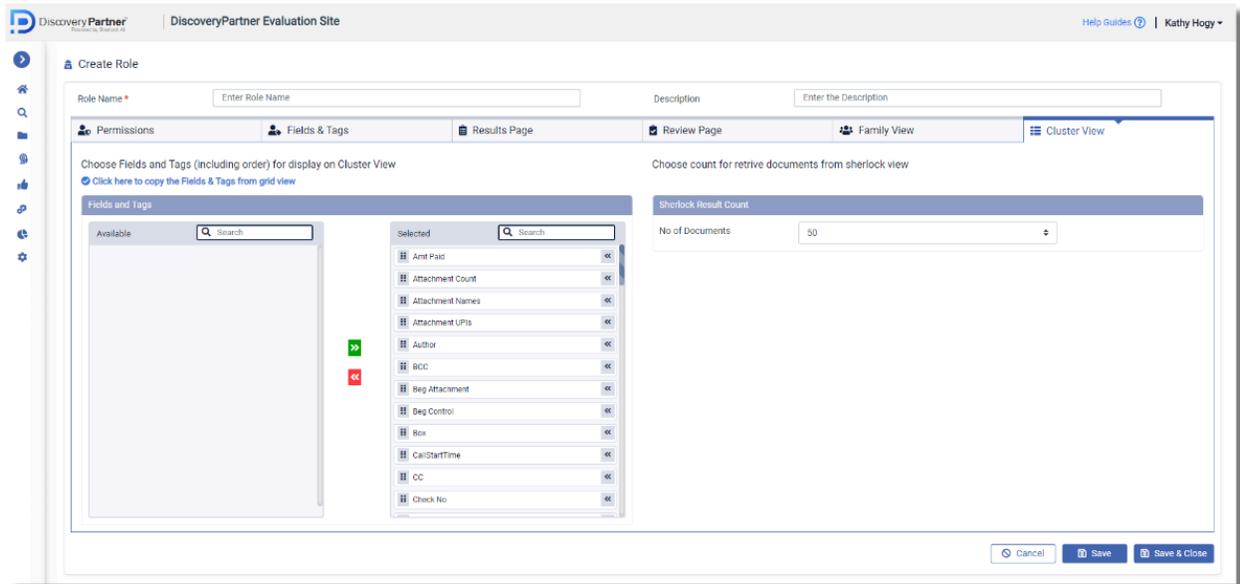
To duplicate the **Grid View** selections from the **Results Page** to the **Cluster View**:

- 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 of results to be displayed) from the drop down

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



Dashboards Setup

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

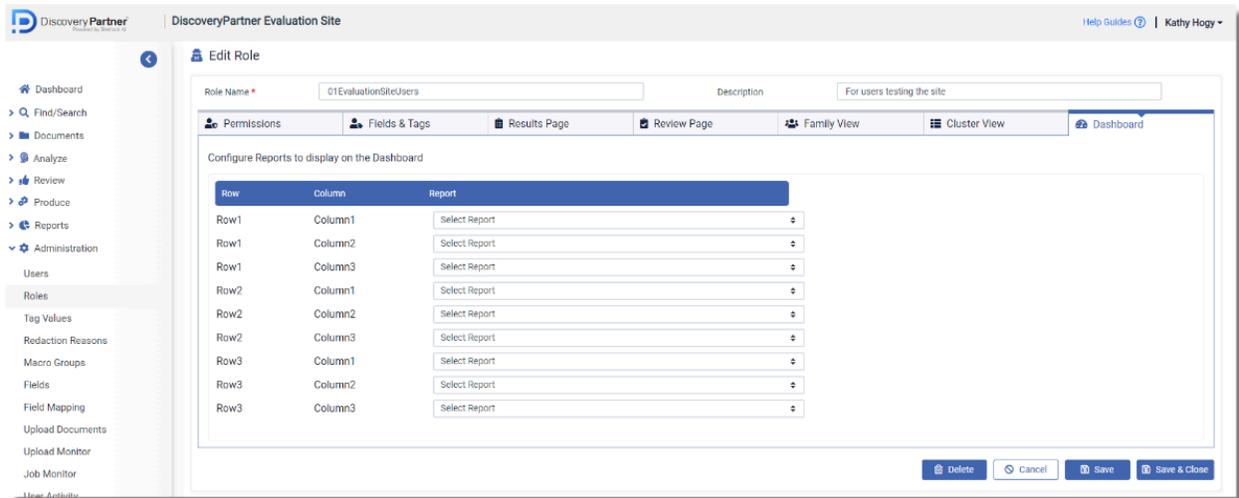
Note The **Dashboard** tab will appear once the role is created. If a role does not have an associated Dashboard, users in that Role will not see a **Dashboard** link and will be directed to the **Search** page after logging into the site.

Here is the view of a typical Dashboard:



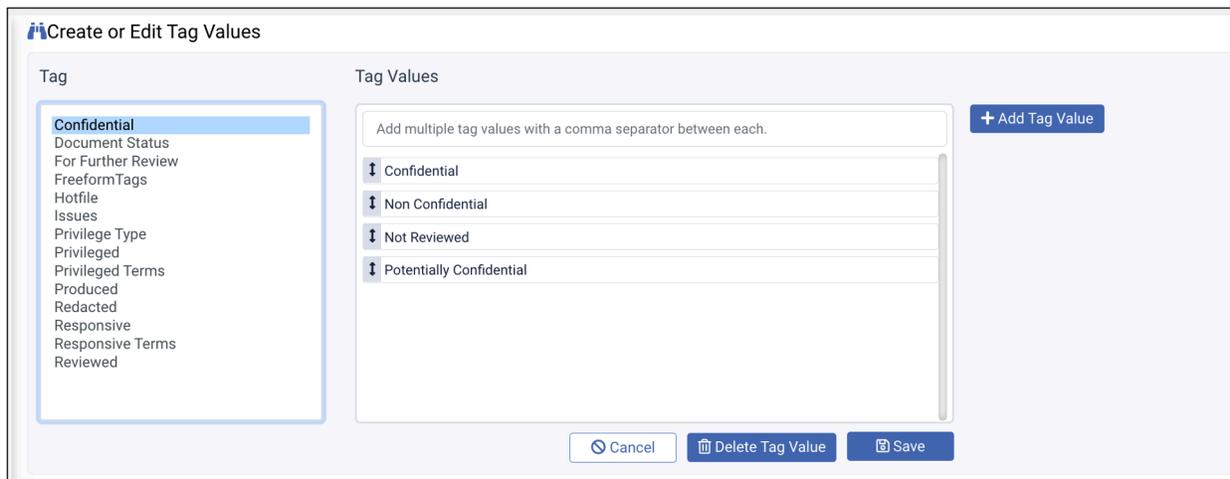
The **Dashboard** layout consists of nine cards arrayed in three columns and up to three rows. Each card holds one of the reports saved to the site (see the **Reports** link in the menu on the left of the **Navigation** panel). Select a report from the dropdown for each of the row/column combinations.

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



Tag Values

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



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

To add a **Tag Value**:

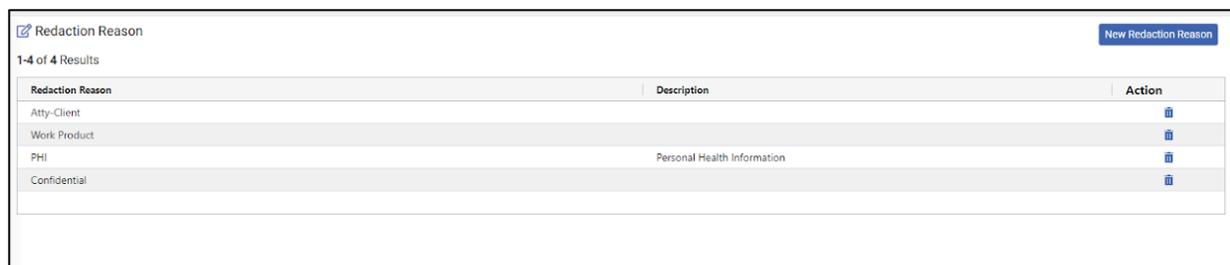
1. In the **Tag Values** textbox enter the value(s) separated by commas.
2. Click the +Add Tag Values button.

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	Description	Action
Atty-Client		
Work Product		
PHI	Personal Health Information	
Confidential		

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.

 Create User

First Name *	<input type="text" value="John"/>	Address	<input type="text" value="Enter Address"/>
Last Name *	<input type="text" value="Smith"/>	City	<input type="text" value="Enter City"/>
Email *	<input type="text" value="JSmith@merlin.tech"/>	State / Region	<input type="text" value="Enter State / Region"/>
Phone	<input type="text" value="303-111-1234"/>	Country	<input type="text" value="United States of America"/>
User Name *	<input type="text" value="JSmith"/>	Postal Code	<input type="text" value="Enter Postal Code"/>
Password *	<input type="password" value="....."/>		
Confirm Password *	<input type="password" value="....."/>		

Role *	<input type="text" value="Please select role"/>	Comments	<input type="text" value="Enter Comments"/>
Active	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		

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.