

Using Markup Sets

1 CONFIGURING MARKUP SETS

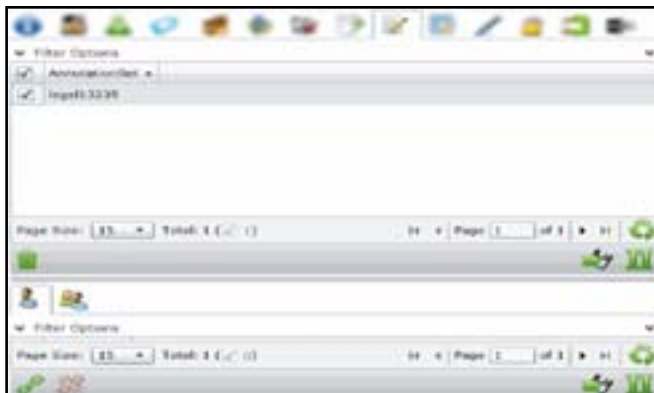
Markup sets are a set of redactions and highlights performed by a specified group of users.

For example, you can create a markup set for paralegals. When paralegal reviewers perform annotations on documents in the *Project Review*, all of their markups will only appear when Paralegal is selected as the markup for the document in the *Natural* panel.

2 CREATING A MARKUP SET


Before you can assign a markup set to a user or group, you must first create the markup set on the *Home* page. Case managers with the Case Administrator permission can create, edit, and delete markup sets.

1. On the *Home* page, click on the **Markup Sets** tab.
2. Click the **Add** button .
3. In the *Markup Set Detail* form, enter the name of the *Annotation Set*.
4. Click **OK**.




3 ASSOCIATING A USER OR GROUP TO A MARKUP SET

If you are a user with the Case/Project Administration rights, you can associate users or groups to markup sets. Once associated, annotations that the user performs in the Project Review will appear on the document in *Native* panel when the markup set is selected.

1. On the *Home* page, click on the **Markup Sets** tab.
2. Select the markup set that you want to associate to a user or group.
3. Click the **User** or **Group** tab at the bottom of the page.
4. Click the **Add Association**  button .
5. In the *All Users* or *All User Groups* dialog, click the plus sign to add the user or group to the markup set.
6. Click **OK**.



4 SELECTING A MARKUP SET

1. Click the **Project Review**  button next to the case in the *Project List* panel.
2. Select a document in the *Item List* panel that has a native application. The document shows up in the *Natural* panel without requiring the native application to view it.
3. In the *Natural* panel, expand the **Markup Set** drop-down and select a markup set.