


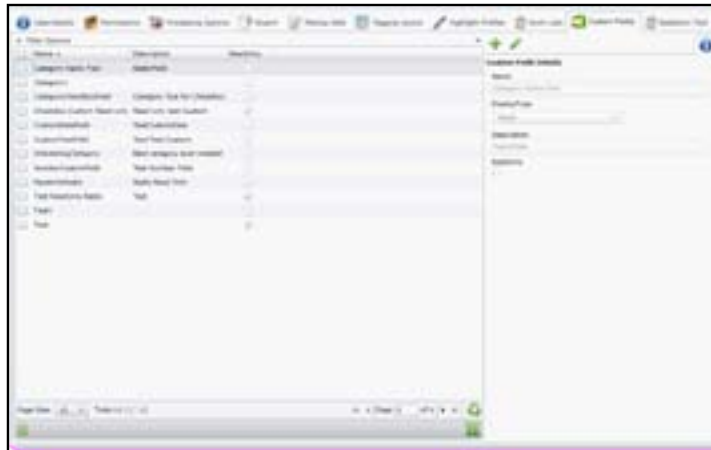
Coding Start to Finish

INTRODUCTION

Coding begins with the case/project manager. The case/project manager creates custom fields and tagging layouts that the reviewer can then use to code the data of documents in the Project Review. Case/Project managers with the Case/Project Administrator permission can set up the coding elements.

1 CREATING CUSTOM FIELDS

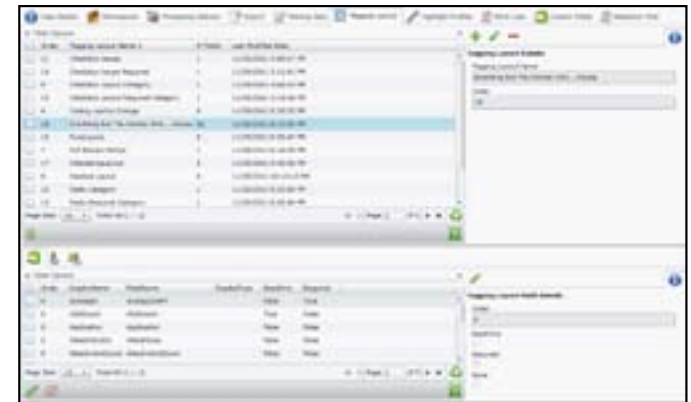
1. Log in as a user with *Case/Project Administrator* rights.
2. On the *Home* page, click on the **Custom Fields** tab.
3. Click .
4. In the *Custom Field Detail* form, enter a name and description.
5. Select a *Display Type*:
 - **Checkbox**: Create a category that contains a check box.
 - **Date**: Create a column that contains a date.
 - **Number**: Create a column that contains a number.
 - **Radio**: Create a category that contains a radio button.
 - **Text**: Create a column that contains text.
6. Check **ReadOnly** to make the column un-editable.
7. Click **OK**.




2 CREATING TAGGING LAYOUT




Tagging layouts are the coding profiles that reviewers use to code documents.

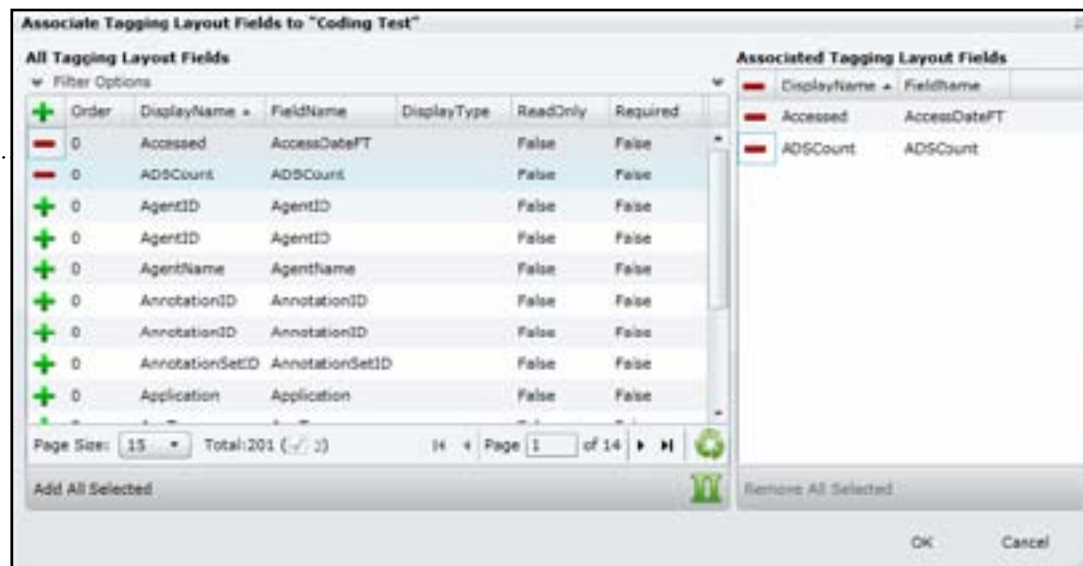
1. Log in as a user with *Case/Project Administrator* rights.
2. On the *Home* page, click on the **Tagging Layout** tab.







3. Click .
4. In the *Tagging Layout Detail* form, enter the name of the tagging layout.
5. Enter the number of the order that you want the layout to appear to the user in the Project Review. Repeated numbers appear in alphabetical order.
6. Click **OK**.

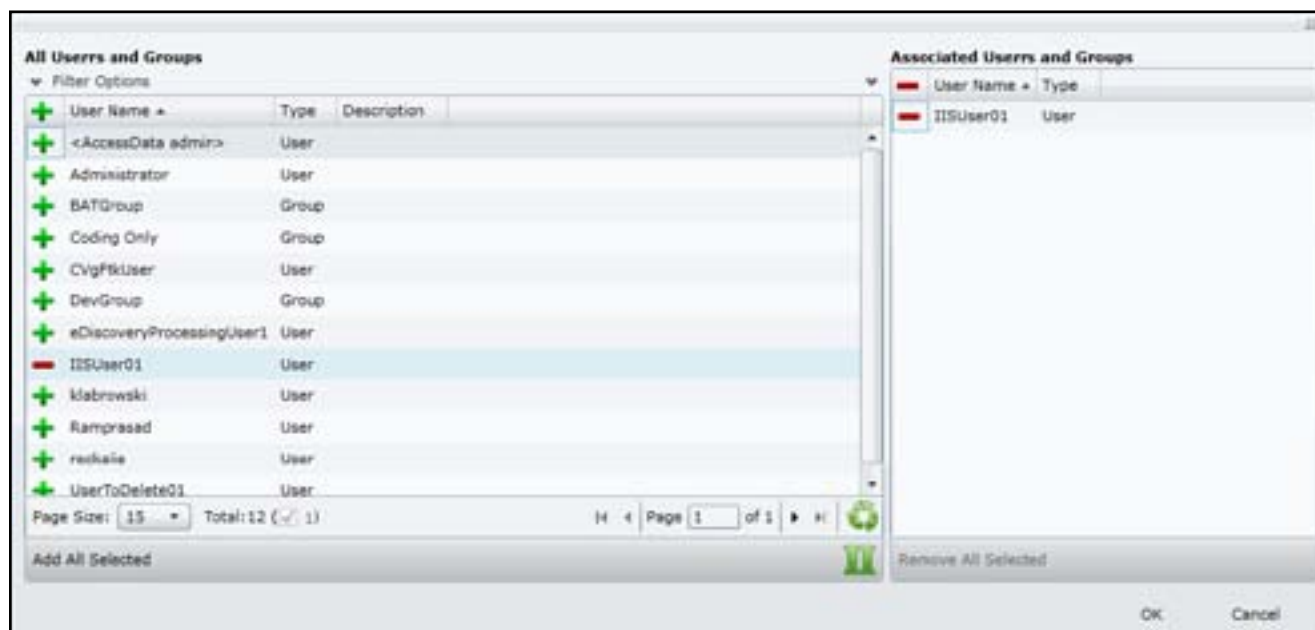
3 ASSOCIATING CUSTOM FIELDS TO A TAGGING LAYOUT

1. From the *Tagging Layout* tab, select the layout that you want from the Tagging Layout list pane.
2. Select the fields tab  in the lower pane .
3. Click the **Add Association**  button.
4. Click  to add the field to the layout.
5. Click **OK**.




4 ASSOCIATING A USER OR GROUP TO A TAGGING LAYOUT

1. From the *Tagging Layout* tab, select the layout that you want from the Tagging Layout list pane.
2. Select either the **Users**  or **Groups**  tab.
3. Click the **Add Association**  button.
4. Click  to add the user or group to the layout.
5. Click **OK**.



5 CREATING CATEGORY VALUES

After you have created Custom Fields for check boxes or radio buttons, you can add values to them in Project Review. You can create multiple values for each category.


1. Log in as a user with *Assign Categories* permissions.
2. Click the **Project Review**  button next to the project in the Project List panel.
3. In the *Case Explorer* panel, click the **Tags** tab.
4. Expand the **Categories** folder.
5. Right-click on the category and select **Create Category Value**.



6. Enter a *Name* for the value and click **Save**.


6 CODING SINGLE DOCUMENTS

Reviewers can code the data for the fields defined in the tagging layout. Fields in blue in the coding layout are required.

1. Log in as a user with View Coding Layout permission.
2. Click the **Project Review**  button next to the project in the *Project List* panel.
3. In the *Item List* panel, select the document that you want to code.
4. In the *Coding* panel, select the layout from the *Layout* drop-down. You must be associated with the layout in order to use it. Then, click **Edit**.
5. Edit the metadata to reflect accurate data. The options available will differ depending on the layout.
6. Click one of the following:
 - **Save**: Click this to save your changes and stay on the same document.
 - **Save and Next**: Click this to save your changes and go to the next document in the *Item List* panel.



7 CODING MULTIPLE DOCUMENTS

1. Log in as a user with *View Coding Layout* permission.
2. Click the **Project Review**  button next to the project in the *Project List* panel.
3. In the *Item List* panel, check the documents that you want to code or leave blank if you want to code all the documents.
4. In the first *Actions* drop-down at the bottom of the panel, select either **Checked** to code only the checked documents in the *Item List* or **All** to code all of the documents.
5. In the second *Actions* drop-down, select **Bulk Coding**.
6. In the *Bulk Coding* dialog, select the layout in the layout drop-down.
7. Edit the metadata to reflect accurate data. The options available will differ depending on the layout that the case/project manager created. Check boxes with a dash (-) indicates that no actions have been performed on the field. Click the check box until it becomes a check mark to apply it to all the selected documents. Click the check box until it is blank to remove it from all selected documents.
8. (Optional) Check the following Include check boxes if desired:
 - **Include Families**: Check to apply the same coding to documents within the same family as the selected documents.
 - **Include Similar Documents**: Check to apply the same coding to all documents related to the selected documents.
 - **Include Linked Documents**: Check to apply the same coding to all documents linked to the selected documents.
9. Click **Save**.



Field	Value
Issues	
Authors	
BCC	
CC	
CreatedDate	11/11/2011 
DocID	

☐ Include Family
☐ Include Similar Documents
☐ Include Linked Documents

Save Cancel

OPTIONAL: CHECKING OUT A REVIEW SET

Reviewers can check out sets of documents for coding.

1. Log in as a user with Check In/Check Out Review Batches permission.
2. In Project Review, show the *Review Batches* panel, check the batch(es) that you want to check out. Skip this step if you are checking out all the review batches.
3. In the first *Actions* drop-down in the bottom of the panel, select **Checked**.
4. In the second *Actions* drop-down, select **Check Out**. Only one person can have a review set checked out at a time.
5. Click **Go > OK**.