Ringtail Basics
Quick Start Guide

Ringtail 9 brings a new level of simplicity, ease of use, and efficiency to document review. The following pages walk through scenarios, based on common tasks, to show the Ringtail features that make the interface easier to use and that add speed and accuracy to review tasks.
Log in and select a case

Follow the Ringtail link and log in to Ringtail.

Note: Your user name is not case-sensitive. Your password is case-sensitive and must adhere to the password parameters for your organization.

If you are logging in for the first time, you will be prompted to accept the End User License Agreement.

On the Portal Home page, click the link for a case.

Tip: You can pin frequently accessed cases to the top of the list.

Note: Your administrator must enable and configure some features.
View updates and notifications

Click the **Notifications** bell on the toolbar on the Portal Home page to see notifications from your administrator.

A “What’s new in Ringtail” box is available on the Portal Home and Case Home pages. Follow the link in this box to read about recent changes to Ringtail.

On the release notes page, you can view release notes for On-Premise environments and SaaS/Hosted environments.

Note: Your administrator must enable and configure some features.
Navigate the interface - Case Home page

On the Case Home page, the **Case Site Map** allows you to access key features in Ringtail quickly.

Note: Your administrator must enable and configure some features.
Navigate the interface - Case Home page
My Assignments and Review Dashboard

Users with permissions can access the following pages from the navigation pane on the Case Home page:

### My Assignments

<table>
<thead>
<tr>
<th>Case Site Map</th>
<th>Assignment</th>
<th>Total</th>
<th>Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Phase A - 1</td>
<td>13</td>
<td>Get</td>
</tr>
<tr>
<td></td>
<td>Phase A - 2</td>
<td>5</td>
<td>Get</td>
</tr>
</tbody>
</table>

### Review Dashboard

- **Document set**: All documents in the case
- **Coding field**: [DEMO]Default 1P
- **9% coded**: 80,180 / 845,818 documents
- **Estimated completion**: No recent review.
- **Average documents coded per reviewer**: No recent review.

**Team**

- **All teams**

**Documents coded**

<table>
<thead>
<tr>
<th>Reviewer</th>
<th>Today</th>
<th>Average per day</th>
<th>Previous 7 days</th>
<th>All time</th>
<th>Coding percentages (all time)</th>
</tr>
</thead>
<tbody>
<tr>
<td>All reviewers</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>80,180</td>
<td></td>
</tr>
<tr>
<td>Booth1, Booth1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Booth3, Booth3</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>50</td>
<td></td>
</tr>
</tbody>
</table>

Note: Your administrator must enable and configure some features.
Navigate the interface - Case Home page

Concept Cloud

The Concept Cloud displays a word cloud of the concepts that were found in a specific document set. The larger the word, the more common the concept is. You can display concepts for all documents in the case, or for documents in a binder, issue, population, sample, or workflow or phase. Use the slider to hide common concepts and display less common concepts.

To view documents that contain a concept, click a word in the Concept Cloud. For example, if you click the word “commission” in the Concept Cloud, Ringtail performs a search and displays your results on the Documents page.

Note: Your administrator must enable and configure some features.
Case Home page – User interface elements

The Case Home page includes some or all of the following items:

**Navigation bar:** This bar at the top includes the following items (from left to right):

- **Ringtail logo:** Click the Ringtail logo to navigate to the Portal Home page from any page in the case. You can open a different case from the Portal Home page.
- **Case name:** Click the case name to return to the Case Home page from any page in the case.
- **Case Home menu:** Use this menu to access different areas of Ringtail, such as the Documents page or the Review Setup page. The Case Home menu and Documents option always appear. The Transcripts option appears if you have permission to access transcripts that are loaded in the case, and the remaining menu options appear if you have permission to access the associated pages.
- **Quick search box:** The quick search box always appears.
- **Quick search menu:** Use this menu to change the quick search options. The options that appear on this menu depend on your permissions.
- **Group name and menu:** If you belong to multiple groups, you can switch between groups that are listed on the menu.
- **User name and menu:** Hover over your user name to view details. To log out of Ringtail, click Log out on the menu. You can also click the user name menu to set search preferences, reset your workspace to the default settings, or access bookmarks.

**Toolbar:** This bar includes the following items:

- **Breadcrumb and breadcrumb menu:** Breadcrumbs allow you to track and navigate back to Ringtail pages. Click the arrow next to the Home button to open the breadcrumb menu, which displays the same list of Ringtail pages as the Case Home menu.
- **Browse:** Click this button to open the Documents page with a workspace that contains the Browse pane.
- **Search:** Click this button to create a new advanced search on the Search page.

**Case Site Map:** Allows you to access key features more quickly, such as assignments or cubes. You can also access your results history and document history. If enabled, this page also includes a “What’s new in Ringtail” section. Follow the link to read about the latest Ringtail features.

**Information bar:** The information bar at the bottom of every page contains a button to open the online help, as well as copyright and version information.

Note: Your administrator must enable and configure some features.
Navigate the interface – Documents page overview

On the Documents page, you can browse, find, review, and code documents.

To access the **Documents** page, if you have already returned a results set, on the **Case Home** page > **Case Site Map**, click a link under **Results History** or **Document History**.

<table>
<thead>
<tr>
<th>RESULTS HISTORY</th>
<th>DOCUMENT HISTORY</th>
</tr>
</thead>
<tbody>
<tr>
<td>(&quot;Binder - Shared&quot; is &quot;All ESSO&quot;) including Sources/Attachments (4,078)</td>
<td>9/12/2017 (6)</td>
</tr>
<tr>
<td>&quot;Concepts&quot; is &quot;commission&quot; (88,748)</td>
<td>9/7/2017 (10)</td>
</tr>
<tr>
<td>(&quot;Thread Analysis Status&quot; is &quot;Success&quot;) Threaded view including Sources/Attachments (54)</td>
<td>8/31/2017 (11)</td>
</tr>
<tr>
<td>&quot;Document Content&quot; contains &quot;raptor&quot; (3,525)</td>
<td>8/30/2017 (6)</td>
</tr>
</tbody>
</table>

**Note:** If you have not previously returned search results, click the **Search** button on the **Case Home** page. After you run a search, a link to your search appears on the **Case Site Map**.

Ringtail displays the **Documents** page with the default workspace.

**Note:** Your administrator must enable and configure some features.
Documents page – User interface elements

The Documents page includes some or all of the following items on the toolbar (from left to right):

- **Search results arrows**: Use the arrows on the left to quickly browse through search results.
- **Search description**: Click the description of the search results to open the search.
- **Document information**: This information appears below the search results arrows and can include the following information:
  - Search preferences indicator: a threaded icon appears if **Threading** was enabled for the search, a paper clip icon appears if **Sources and attachments** was enabled, and a rendition icon appears if **Renditions** was enabled.
  - A button that allows you to copy the active Document ID to the clipboard.
  - The active Document ID.
  - Total document count.
  - Selected document count. Click the X to quickly unselect these documents.
- **Browse**: Click the **Browse** button to open the Browse pane, if it is not already open.
- **Search**: Click the **Search** button to create a new advanced search.
- **Workspaces buttons and menu**: To change the current workspace configuration, click a different workspace button. To open a menu that allows you to add a new workspace, modify an existing workspace, or select workspaces to pin to the toolbar, click the arrow next to the workspaces button.
- **Tools**: To use document tools, click the arrow next to the **Tools** button.
- **Document arrows**: Use the arrows on the right to quickly browse through documents in the results set.

**Tip**: To increase the height of your workspace, you can collapse the Documents page toolbar. Click the **Collapse** button on the navigation bar, next to your user name.

Note: Your administrator must enable and configure some features.
You can set preferences for searches, including whether to include threaded documents, attachments with source documents, or renditions in your searches. You can also include line numbers in your search results in the List. All options are cleared by default.

The Search preferences menu option is available on the user name menu on the navigation bar of any page in the case.

Once saved, Ringtail applies your preferences to your next search and to subsequent searches.

**Note:** The options that you set on the Search preferences menu sync with the search preference options at the bottom of the Search page.
Run a simple search

Use the quick search box, which is available on the navigation bar of all pages in the case, to perform simple searches.

Simply start typing in the quick search box to start your search. In the results list, you can filter by certain search parameters.

If you have permission, you can also manage the properties or security for objects such as binders.

The quick search menu, available by clicking the gear button next to the quick search box, lists the types of searches that you can perform.

Note: Only one option, Document Content, is selected by default.
Perform an advanced search

To access the Search page, click the Search button on the Case Home page or the Documents page.

- Select from a wide range of fields, operators, and values.
- To set search preferences, select the check boxes at the bottom of the page. All options are cleared by default.
- To run the search, click Search.

Use the Search menu to create a new search, or to copy, open, save, or delete a search. You can pin these options to the Search toolbar.

Note: If you attempt to save an existing saved search, a confirmation message appears and you must click OK to confirm overwriting the existing saved search.

Note: Your administrator must enable and configure some features.
Build a search query

Build your search using the values, operators, and buttons on the Search page.

- **Gray** bracket: Group of search queries.
- **Green** bracket: Group of search queries joined by an “or” operator.
- **Red** bracket: Group of search queries joined by an “and” operator.
- **Blue** bracket: Group of search queries joined by a “not” operator.

**Tip:** To build your search without using a mouse, click the **Keyboard Shortcuts** button on the toolbar or the **Search** menu to see a list of keyboard shortcuts.

Note: Your administrator must enable and configure some features.
Work with the Browse feature

To open the Browse pane, on the Case Home page or the Search page, click the Browse button on the toolbar. The first workspace that includes the Browse pane appears, and displays the Browse features available to you.

In the Browse pane, you can perform the following tasks:

- Browse for a new document set. To do this, click the name of the item that you want to browse for. For example, you can locate the documents in a binder, or browse to the documents that contain a specific concept.
- Select and filter documents within the current document set that meet various criteria. To do this, select the check box next to the criteria. For example, you can select all of the documents that are coded with a specific quick code value or that are designated with a specific issue, and then filter the results set to display only those documents.
- Use the Find feature to select documents within a results set based on content hits or coding values.

You can customize the sections that appear in the Browse pane. For example, you can add pick lists as new sections. To do this, click the Options button.

The Browse pane also includes additional functions for managing concepts, viewing and modifying descriptions, and downloading concept reports.

Note: Your administrator must enable and configure some features.
About the Workspace feature

The workspace is the arrangement of panes on the Documents page. The workspace appears when you open the Documents page after you run a search or browse a document collection.

Tip: You can collapse or resize any of the panes, if you need more space. If you narrow the width of a pane, the pane name collapses into a menu.

You can perform different tasks in each pane, as follows:

- Use the **Browse** pane to browse for a new document set, select and filter documents within the current results set that meet various criteria, or find document content or coding hits.
- Use the **List** pane to see information about each document, along with coding and document details.
- Use the **View** pane to view a document’s text content, native files, and image files.
- Use the **Code** pane to code documents.
- Use the **Conditional Coding** pane to code documents.
- Use the **Map** pane to see an alternate view and visualization of documents that are clustered based on the similarity of concepts.
- Use the **Timeline** pane to review the distribution of documents over time and how they intersect with other information, such as concepts, quick codes, content searches (find), and search term families.
- Use the **Related** pane to see a list of documents that are related to each other based on threaded relationships, source and attachment relationships, or similarity of concepts.

Note: Your administrator must enable and configure some features.
Customize the workspace

Multiple workspaces are available by default. You can pin up to three workspaces to the toolbar.

**Note:** If you do not see the default workspaces, on the user name menu, under **User settings**, select **Reset to Ringtail default**.

To change the current workspace, click one of the three pinned workspace buttons (A, B, or C) on the toolbar or click a workspace on the workspace menu.

To pin a different workspace to the toolbar, open the workspace menu, and then click the pin next to a workspace.

To add a new workspace or edit an existing workspace, open the workspace menu. Then click **Add new workspace** or **Edit current workspace**.

You can configure a workspace to contain up to five panes, including **Browse, List, View (A), View (B), Code, Conditional Coding, Map, Timeline**, and **Related**.

**Note:** Your administrator must enable and configure some features.
Work with documents in the List pane (standard view) – Overview

When you search for documents, the results typically appear in the **List** pane on the **Documents** page. The List pane includes information about each document, along with coding and document details.

Use the **List** pane to perform the following tasks:

- Select documents to view and code
- Select documents for the Working list
- Apply quick codes to documents
- Modify which columns appear in the List pane
- Work with threads
- Work with base documents and renditions
- Filter and search the documents in the List pane
- Open a document in a linked workspace or in a standalone window
- Copy the link to selected documents
- Find similar documents

To download a list of documents, click **Download** on the **List** menu.

**Note:** You can display line numbers in the **List** pane, which you can set under **Search preferences** on the user name menu or on the **Search** page.

**Note:** Your administrator must enable and configure some features.
Configure columns in the List pane

In the **List** pane, you can sort, add, and delete columns. You can add as many columns as you need. You cannot remove or change the position of locked columns in the List pane, although you can hide them from display.

Note: Your administrator must enable and configure some features.
Filter columns in the List pane

After performing a search, you can narrow your search results by filtering the columns in the List pane. You can filter for text, dates, yes/no values, or numbers.

Text filter

To return to the unfiltered results for the search, click the left arrow button on the left side of the toolbar.

After you apply a filter, the criteria used for the filter become part of the search label. You can then click the label to open an advanced search with these criteria on the Search page.

Note: Your administrator must enable and configure some features.
Edit fields inline in the List pane

You can edit the values of some fields directly in the List pane. Fields that can be coded directly in the List pane appear with an icon in the column heading.

Double-click on a field to edit its value.

Tip: You can undo changes made to editable fields in the List.

Note: Your administrator must enable and configure some features.
Work with the email threading feature

The email threading feature analyzes document content and organizes email conversations into threads. In threaded view in the List pane, you can review documents using both standard and threading-specific elements.

Threading-specific elements include the following:

- Pivot documents, which contain unique content. A thread can have one or more pivots.
- Recipient and attachment changes within a thread.

**Note:** You can use the expand all and collapse all buttons to view all threads or just pivot and root documents.

You can use email threading to perform the following tasks:

- Shorten review time by removing duplicate documents and coding only pivot documents.
- Increase review efficiency and accuracy by reviewing threaded documents together.
- View other thread information, such as the thread analysis status, thread ID, thread order ID, and the threaded document type.

**Note:** Your administrator must enable and configure some features.
Work with the email threading feature

To work with the email threading feature, you can perform the following steps:

• Return a set of documents.
• Add documents to thread analysis or remove documents from thread analysis by using the option on the Tools menu.
• After Ringtail has analyzed the documents and created threads, review the threaded documents.

Note: You must select the **Threading** option on the **Search preferences** menu (on the user name menu or on the Search page).

Note: Your administrator must enable and configure some features.
Review documents in the View pane

When you review a document, you determine the document’s relevance to a case and identify any important content. You review the content of individual documents in the View pane.

The View pane includes different view options to allow you to review a document in the format that is most appropriate for the document type, the case strategy, and the overall goals of the review. Because you can see different content in each view, it is important to review documents in all views.

Depending on the tasks that you want to accomplish, the type of document you are reviewing, and the specific content that you want to review, you can view a document in the following formats:

- **Formatted content**: Displays the text extracted from a document, with simple formatting applied.
- **Unformatted content**: Displays the text extracted from a document without any formatting.
- **Native**: Displays a document in the native file format of the original application that created the document, using the Quick View Plus viewer.
- **Office Online viewer**: Displays a native document in Microsoft Office Online directly in the browser.
- **Image viewer**: Displays image files, PDF documents, and media files.

Note: Your administrator must enable and configure some features.
Review documents in the View pane - Formatted content view

**Formatted content:** Displays the text extracted from a document, with simple formatting applied.

You can perform the following tasks:

- View keyword hits
- Conduct ad hoc keyword searches
- Search for similar documents based on a selection of text
- View streamlined Bloomberg chats, with interactive color-coding based on participants' organizations

Note: Your administrator must enable and configure some features.
Review documents in the View pane - Unformatted content view

**Unformatted content:** Displays the text extracted from a document without any formatting.

You can perform the following tasks:
- View keyword hits
- Conduct ad hoc keyword searches
- Search for similar documents based on a selection of text

Note: Your administrator must enable and configure some features.
**Review documents in the View pane - Native view**

**Native:** Displays a document in the native file format of the original application that created the document, using the Quick View Plus viewer.

You can perform the following tasks:

- Search for content
- Watch video files and listen to audio files

Note: Your administrator must enable and configure some features.
**Review documents in the View pane - Office Online viewer**

**Office Online viewer:** Displays native files directly in Ringtail using Microsoft Office Online. You can review native files without having to download documents to your computer.

You can perform the following tasks:
- Search for content
- See formulas*, resize columns, and display hidden worksheets, rows, and columns* in a Microsoft Excel spreadsheet
- View comments in Microsoft Word*, Microsoft Excel, and Microsoft PowerPoint
- View slide notes*, slide thumbnails*, and hidden slides* in a Microsoft PowerPoint presentation
- Use standard Microsoft Office features to review content*
- View native files that were created in applications other than Microsoft Office
- Watch video files and listen to audio files
- Display hidden content

**Note:** Depending on the portal configuration, you may be able to edit documents temporarily, such as adding temporary highlights. Ringtail does not save any edits that you make in the Office Online viewer.

* The availability of features marked with an asterisk (*) depends on your organization's license with Microsoft and the portal options that are configured by your administrator.
Review documents in the View pane - Image viewer

**Image viewer:** Displays image files, PDF documents, and media files.

You can perform the following tasks:
- View imaged document pages
- Add annotations such as highlights or redactions
- Search for text to highlight or redact in searchable PDFs
- Convert highlights to redactions, and convert redactions to highlights
- Add notes to specific document pages
- Print a document
- Watch video files and listen to audio files
- View comprehensive Bloomberg chats, including event logs and noise content

Note: Your administrator must enable and configure some features.
The following table describes the features in the View pane.

<table>
<thead>
<tr>
<th>Element</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formatted content</td>
<td>Displays the text extracted from a document, with simple formatting applied.</td>
</tr>
<tr>
<td>Unformatted content</td>
<td>Displays the text extracted from a document without any formatting.</td>
</tr>
<tr>
<td>Native</td>
<td>Displays a document in the native file format of the original application that created the document, using the Quick View Plus viewer.</td>
</tr>
<tr>
<td>Office Online viewer</td>
<td>Displays native files in Microsoft Office Online directly in the browser.</td>
</tr>
<tr>
<td>Image viewer</td>
<td>Displays image files, PDF documents, and media files.</td>
</tr>
<tr>
<td>Document type</td>
<td>Indicates the document type. If quick coding is enabled, click the document type button to apply a quick code to a document.</td>
</tr>
<tr>
<td>Source/Attachment family</td>
<td>A colored line next to the document type button indicates that the document is part of a document family. A document family contains a group of documents made up of a source document and its attachments. The color of the line indicates the quick code value that has the highest family rank within that document family.</td>
</tr>
<tr>
<td>Document ID</td>
<td>The ID number of the document that appears in the View pane. The document ID is a unique number that is associated with each document in the database. The document that appears in the View pane is also called the active document.</td>
</tr>
</tbody>
</table>

Note: Your administrator must enable and configure some features.
## View pane features (2 of 2)

<table>
<thead>
<tr>
<th>Element</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hidden content warning</td>
<td>Indicates that a native file includes hidden content, such as tracked changes, speaker notes in a presentation, or hidden columns in a spreadsheet. Hover over the warning icon to determine the type of hidden content that the document contains.</td>
</tr>
<tr>
<td>Truncated content warning</td>
<td>Indicates that a document is larger than the maximum file size set by your administrator. To see the whole document, switch to a different view or download the document.</td>
</tr>
</tbody>
</table>
| Keyword hit navigation | Displays the number of keyword hits in the document. To navigate between keyword highlights in the document, click the Next hit or Previous hit buttons.  
**Note:** If the document is larger than the maximum file size set by your administrator, only the number of visible keyword hits appears. |
| Keyword highlights     | Displays keyword highlights and allows you to conduct ad hoc content searches. |
| Find and redact        | Allows you to find text in a searchable PDF document, and then add highlights or redactions to the text. |
| Show hidden content    | Displays hidden content in Microsoft Excel, Word, and PowerPoint documents. |
| Download               | Downloads a document in its original file format.                         |
| Update pages           | Allows you to add or remove pages in a document, if you have permission to do so. |
| Collapse               | Collapses the View pane.                                                  |
| View menu and options  | The View menu includes options for working with documents in the View pane.  
**Note:** You can pin any of these buttons to the View pane toolbar. |

*Note:* Your administrator must enable and configure some features.
Coding a document is the process of marking a document with the information that you identify during a review. Documents that are coded as responsive can then be produced and provided to a third party in response to a discovery request.

Depending on your case, you can code documents in the Code pane or the Conditional Coding pane.

In the Code pane, you can perform the following coding tasks:

- View the existing coding values for a document, locate documents that are coded with the same values, or configure the layout of the Code pane.
- Quickly code a document by selecting a color-coded value from a list (called a quick code).
- Apply suggested coding values to a document using hints.
- Add or update values in individual coding fields.
- Code documents to issues.
- Code documents to binders.
- Code documents to people or organizations.
- Link a document to related objects, such as other documents, shared binders, issues, levels, saved searches, transcripts, or websites.

Note: Your administrator must enable and configure some features.
Code documents in the Code pane

- To save field edits, press Tab or Enter.
- To delete field edits, click the field value, and then press Delete.
- Multivalue fields display a plus sign and allow you to code multiple values.
- When coding pick list fields with many values, type a few letters to narrow the list of values.

To edit a field, click in any field with a blue triangle and change its value.

To apply issue coding, on the All Values menu, select Issues, and then select one or more check boxes.

To apply a quick code, click the blue dot.

To search for documents that have the same coding, click the magnifying glass.

Tip: To apply values from the previously displayed document, select a coding template on the All Values menu, and then use coding hints.

Note: Your administrator must enable and configure some features.
Code documents in the Conditional Coding pane

When you code documents in the **Conditional Coding** pane, you can quickly determine which fields, binders, and issues you should code depending on the values that you provide for related fields. After you code each object, the colors of the remaining objects change to indicate which items you still need to code.

Objects that you have already coded appear in green, objects that your administrator does not expect you to code appear in gray, and objects that must still be coded appear in white.

If you code a value that is unexpected based on the other values that you have coded, the object appears in yellow and a warning message appears.

**Tip:** You can use coding macros to code a document to a predefined set of values by clicking a single button. To create a new coding macro, click the plus (+) button.

**Note:** To access this feature, add a Conditional Coding pane to your workspace.

**Note:** To access this feature, add a Conditional Coding pane to your workspace.

**Note:** Your administrator must enable and configure some features.
Work with the Map

The Map pane is an alternate view of documents in an assignment or a search results set in which documents are clustered based on the similarity of concepts.

You can navigate from document to document, view relationships between documents, search documents, and code documents while viewing the Map.

You can display up to 10,000 documents per page.

You can perform the following tasks with the Map:
• Review documents based on their concepts.
• Explore concepts that tend to appear together in selected documents.
• Find documents that share common concepts.
• Apply quick codes to one or more documents directly in the Map.
• Find documents that have the same quick code or the same family quick code.
• Select multiple documents for a bulk action, such as coding or adding documents to a binder.
• Search the Map for keywords to locate clusters and documents with those terms.
• Select a document to preview in the View pane or in a standalone workspace.
• Discover new concepts in the documents.

Note: Your administrator must enable and configure some features.
**Map elements**

The Map pane contains the following elements:

- **Concept cluster:** A group of documents in a spiral arrangement in a circle. The circle may appear solid when you first open the Map, indicating that all the documents in the cluster have the same quick code value. You can configure the Map to always display individual document dots.

- **Cluster tooltip:** A tooltip that appears when you hover over a cluster. The tooltip displays the concept shared by clusters displayed on the spine. When spines intersect, multiple concepts display at the top of the tooltip. The tooltip displays the top concept, the next highest six concepts, the number of documents in the cluster, the percent of documents coded, and the top document titles in the cluster. You can configure the Map to position the tooltip in the corner of the pane.

- **Concept compass:** The ring that surrounds concept clusters. Clusters can appear inside or outside the ring depending on the cluster configurations.

- **Map menu:** The menu associated with the Map pane that lists options for using and configuring the Map. You can pin the options on the menu to the Map toolbar for easy access.

- **Page navigation window:** A small window on the side of the Map that appears when the Map includes more documents than can be displayed on one page. Use the navigation controls to move through documents on additional pages of the Map. You can configure the number of documents to view per page on the Map pane’s Options menu.

- **Set-aside clusters:** Square containers, or clusters, in the lower right for storing coded documents. The color indicates the quick code value. Use the Quick Codes section in the Browse pane to move documents between the Map and the set-aside clusters.

- **Spine:** A line that connects clusters that have one or more significant concepts in common. Along a spine, documents in adjacent clusters are more similar to each other than to documents in clusters that are farther away.

- **Spine label:** The concept that clusters in a spine have in common. The spine label appears around the concept compass. Spine labels can provide a quick overview of the key concepts in an area of the Map.

- **Triangle:** Indicates the active document.

- **Zoom slider:** A vertical control on the right side of the Map that allows you to zoom in and out of clusters.

*Note: Your administrator must enable and configure some features.*
Customize the Map

Although the default display in the Map is sufficient for most review work, you may want to modify what you see in the Map. Options for configuring the Map appear on the **Options** menu, which you can access through the Map menu.

- **Spines**: Shows or hides the spines that join concept clusters.
- **Compass**: Shows or hides the compass ring.
- **Labels**: Shows or hides the concept labels that appear around the compass ring.
  - **Pointers**: Shows or hides the lines that connect related concept clusters to the concept labels.
- **Show tooltip**: When you hover over a cluster, displays a tooltip that provides information about the documents in the cluster.
  - **Pin tooltip**: Displays the cluster tooltip in a corner of the Map so that it does not cover up the Map.
- **Set-aside on family code**: Automatically places all of the documents in a document family in the set-aside cluster that matches the documents' family code (the highest-ranking quick code value for the family). When this option is cleared, each document is placed in the set-aside cluster that matches the document’s individual quick code.
- **Solid for uniform coding**: If all of the documents in a cluster have the same quick code, the concept cluster appears as a solid color. If documents within the cluster have different quick codes, the cluster shows individual colored dots. When you zoom out, the cluster appears as a pie chart, which represents mixed coding in a cluster.
- **Working list**: Displays the Working list view in the List pane.
- **Page size**: Sets the number of documents to display on each page. The default is 2,500, although you can display up to 10,000 documents per page.

**Tip:** On the **Tools** menu, you can select a color theme for the Map and the Timeline.

**Note:** Your administrator must enable and configure some features.
Work with the Timeline

In the **Timeline** pane, you can review the distribution of documents over time and determine how they intersect with other information, such as concepts, quick codes, content searches (find), and search term families.

You can perform the following tasks with the Timeline:

- Select documents in a time range, a specific time interval, or a selection of specific time intervals.
- As a reviewer, select a different Timeline date field to use during a review. The time field used to configure the Timeline is set at the case, group, and user level.

You can use the Timeline feature with result sets up to 50,000 documents.

**Tip:** On the **Tools** menu, you can select a color theme for the Map and the Timeline.

Note: Your administrator must enable and configure some features.
Work with the Related pane

In the Related pane, you can review documents that are related to each other based on threaded relationships, source and attachment relationships, or similarity of concepts.

The Related pane includes the following sections:

- **Sources and attachments**: Displays the active document and any documents with a source or attachment relationship to the active document.
- **Threading**: Displays the active document and a list of documents with a threaded relationship to the active document.
- **Similar**: Displays the active document and a list of documents that share at least 70% of the same concepts. The number in the Similarity column indicates the fraction of concepts that the documents share in common.

You can perform the following tasks in the Related pane:

- Change the active document within a document family
- See the coding for related documents
- Apply quick codes to documents
- Maximize a section, or collapse or expand sections

Note: Your administrator must enable and configure some features.
Work with Tools on the Documents page

The Tools menu on the Documents page includes a variety of features for working with documents. You can pin the options on the Tools menu to the toolbar.

The new Imaging tool allows you to convert documents to images, and the Reverse previous imaging tool allows you to reverse the imaging process. The Imaging tool replaces the TIFF-on-the-Fly feature.

Note: Your administrator must enable and configure some features.
Print documents to PDF

You can print documents to PDF using the **Batch Print** tool, which is located on the **Tools** menu. After you print documents to PDF, you can use the print options in your PDF viewer to print hard copies.

You can print documents that contain image files or PDF files. You can specify whether to include highlights, redactions, and footers.

You can print each document separately or combine multiple documents into one PDF file.

**Batch print**

Note: Your administrator must enable and configure some features.
Review Bloomberg chat documents

You can review chat documents from Instant Bloomberg chats and persistent chat rooms. Chats are also called instant messages.

A chat includes a variety of information. In addition to the messages that participants send to each other, a chat can include the following information:

- Content that participants send to each other, such as messages, attachments, and invitations to ask other people to join the chat.
- Event logs that provide information about participants' actions, such as when a person entered and exited a chat, or whether a person viewed the chat history to learn what happened in a chat room before they entered.
- Noise content that is distracting or irrelevant to the review, such as automatic disclaimers that are posted when people enter a chat.
- Metadata, such as the date and time of the chat, the names of participants, and the number of messages in the conversation. You can search for chat metadata and use it to focus the review. The metadata for a chat document appears in the Code pane.

Tip: To search for chat documents, create a search that includes the Document Type field with a value of Bloomberg Instant or Bloomberg Persistent.

Note: Your administrator must enable and configure some features.
Review Bloomberg chat documents

Depending on your review strategy, you can review chat documents in the View pane using the following views:

- **Lite chat**: Quickly review only the content that participants sent to each other. Lite view displays a subset of chat information: messages, attachments, and invitations. The chat is color-coded based on participants' organizations. You can identify content that was sent by specific people or organizations by toggling participant names, organizations, or actions in the summary table. You can also display or hide keyword highlights.

- **Full chat**: Review all of the information in a chat, including content that participants sent to each other, event logs, and noise content. You can use event logs to determine the full context of a chat. For example, you can identify whether an individual participated in a chat when something important was said, even if they only viewed the content and did not send a response. As another example, you can analyze an individual's view history to determine when they learned about particular information.

Both chat views include a summary table that displays the organization names, participant names, and the number of messages (MSG), attachments (ATC), and invitations (INV) that were sent by each participant.

**Tip**: People frequently use informal language, abbreviations, and jargon in chats, and typos may be common. Because of this, you should adjust your search and review strategy to make sure that you do not miss any important information. If you use keyword highlights to identify important content, your administrator or review lead should make sure that any search term families include all relevant phrases.

If the chat file includes attachments, the attachments are attached to the chat document in Ringtail.

To add annotations to a chat document, such as redactions, you can create an image file of the chat document, and then annotate the image file.

Note: Your administrator must enable and configure some features.
Review transcripts

You can review transcripts on the **Transcripts** page.

To access the **Transcripts** page, on the **Case Home** menu, click **Transcripts**.

All users can do the following:
- Search and filter transcripts based on content, annotations, or transcript type
- Annotate transcripts with highlights (transcript issues) and notes
- Link transcripts to other objects in a case, such as related transcripts
- Create a report of the annotations in one or more transcripts
- Export transcripts to Microsoft Word

Group leaders can do the following:
- Upload transcripts to a case
- Download transcripts as portable case format (PCF) files, to share with users outside of Ringtail
- Administer transcripts

Note: Your administrator must enable and configure some features.
You can access your assignments from the Case Home page by clicking My Assignments in the navigation pane. Or, click the My Assignments link on the Case Site Map.

On the My Assignments page, you can get your assignments, clear completed assignments, and suspend or unsuspend assignments. Group leaders can also revoke assignments.

After you access your assignments on the My Assignments page, Ringtail displays the documents that require coding or review. Where the documents appear depends on your workspace configuration. The documents typically appear in the List pane.

If an assignment meets the coding requirements, the assignment is automatically cleared.

Note: Your administrator must enable and configure some features.
Review Dashboard

You can view the progress of an active review using the Review Dashboard. The Review Dashboard includes a progress bar, graph, and reviewer matrix that display the review status of all documents in the case. The information in the Review Dashboard is pre-populated to show all documents in the case. If you select a different document set, coding field, or team, the dashboard updates accordingly.

To access the Review Dashboard, on the Case Home page, click the Review Dashboard link in the navigation pane. Or, click the Review Dashboard link under Analysis.

Note: This feature is available to case administrators by default. Administrators can enable this feature for group leaders and group members on the Security > Administration page.

Note: Your administrator must enable and configure some features.
Review Dashboard

The Review Dashboard includes the following information and options:

- **Document set**: The default option is *All documents in the case*. You can select a type of document set in the list, such as a binder. After you select a type, a second list appears. Depending on the type, select a specific document set from the list, or click the arrow and then select a specific document set. The progress bar, chart, and reviewer matrix update to show information for the newly selected set of documents.

- **Coding field**: This list prepopulates with a quick code field. You can change this field to any quick code field currently available in the case. When you select a different quick code field from the list, the Review Dashboard updates accordingly.

- **Progress bar**: Indicates the percentage of documents that are coded.

- **Estimated completion**: Indicates the estimated number of working days that are required to code the remaining uncoded documents, based on a rolling average review rate over the past seven days, excluding weekends.

- **Average documents coded per reviewer**: Indicates the rolling average of documents that are coded per reviewer per day, excluding weekends.

- **Doughnut chart**: Displays the number of documents and percentages of coded values for the selected coding field.

- **Team list**: Allows you to see the review status for different teams. The default option is All teams. When you select a different team, the information in the reviewer matrix updates, but the rest of the information in the Review Dashboard remains unchanged.

  Note: The available teams depend on each team’s security settings in the Review Setup section. Users with permission to administer teams can choose from any team. Users without permission to administer teams can choose from the teams that they are members of.

- **Reviewer matrix**: This table, located at the bottom of the page, displays coding metrics for individual reviewers, such as the average number of documents coded per day. A bar chart for each reviewer shows the percentages and number of documents that the reviewer coded for each quick code value. Hover over a bar to see the details. You can sort the columns in the Documents coded area.

  **Tip**: To export information in the reviewer matrix to a spreadsheet (.csv file), click the **Download** button on the toolbar.

Note: Your administrator must enable and configure some features.
Work with Search Terms

You can view statistics for search term hits in documents using the **Search Terms** reporting feature.

To access the **Search Terms** page, on the **Case Home** page, click the **Search Terms** link under **Analysis**.

- In the Counts section, you can view information about search term hits across document sets. You can also view how each search term contributes to the overall population of hits at a document and family level.
- In the Coding section, you can review how many documents containing a particular term were coded with specific values. This allows you to evaluate search term effectiveness using recall and precision values.

<table>
<thead>
<tr>
<th>Search term family</th>
<th>Document set</th>
<th>Coding field</th>
<th>Positive</th>
<th>Negative</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Priv Terms</td>
<td>Binder - Shared</td>
<td>[AR] - Privilege Asserted</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

You can download the full report as a spreadsheet (.csv file).

**Note:** An administrator can make this feature available to group leaders or group members on the Security > Administration page.

**Note:** Your administrator must enable and configure some features.