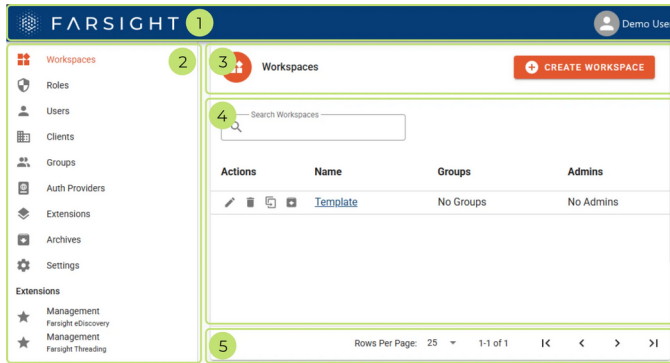


## Platform Management



### 1. Navigation bar

Click this section to open a drop-down with the following options: **About** dialog shows version and build number. **Settings** is to change your password or see the account details. **Logout** to quit the session and return to the login screen.

### 2. Menu panel

Navigate across the core object types of the platform.

### 3. Title bar

To the left is the icon and title of the object type selected by the tab panel.

To the right is typically a button for creation of new records or comparable actions. For example there is a **CREATE** button for *Roles* and *Groups* but there is an additional button **INVITE USERS** on tab *Users*. Another example is *Archives* where the button is labeled **IMPORT ARCHIVE**.

### 4. Record list

The search box at the top can be used for filtering objects based on the values appearing in **Name** and other text based column.

The column header shows the available attributes for the object. These views in *Platform Management* are not modifiable. Click a column title to change the sort order which is then reflected by an arrow.

The **Actions** column might show various icons depending on the selected object type. For *Workspaces* these **Actions** are: **Edit, Delete, Clone, Archive**.

The **Name** column shows a link to enter the object or open the corresponding details.

### 5. Footer bar

Change the record count displayed per page: 15, **25**, 50, 100, 250

Currently displayed record range and total amount of records.

Navigate between the pages.

## Workspace Management

### 1. Navigation bar

The name of opened *Workspace*.

### 2. Menu panel

Switch between panels.

Minimize the menu panel.

Available panels options:

Show the menu tabs.

Browse the *Saved Queries*.

Browse the *Field* tree.

Browse the folder tree.

### Menu tabs

Tabs to navigate between the core types of the *Workspace*.

Tabs to navigate between the extended object types of the *Workspace*.

- The available tabs are segregated based on their origin:
- Tabs for core types are displayed at the top and follow the same schema as described in *Platform Management* e.g. *Views, Layouts* etc.
  - Tabs for object types added by *Extensions* e.g. *Documents, Batch Sets* etc. are following the schema as described in this section.

Return to the *Platform Management* level.

### 3. Title bar

To the left is the icon and depending on tab panel selection: The **Title** for core object types. The **Name** of the active *View* for custom object types. In this example object type *Documents* is selected and displayed by *View All Documents*.

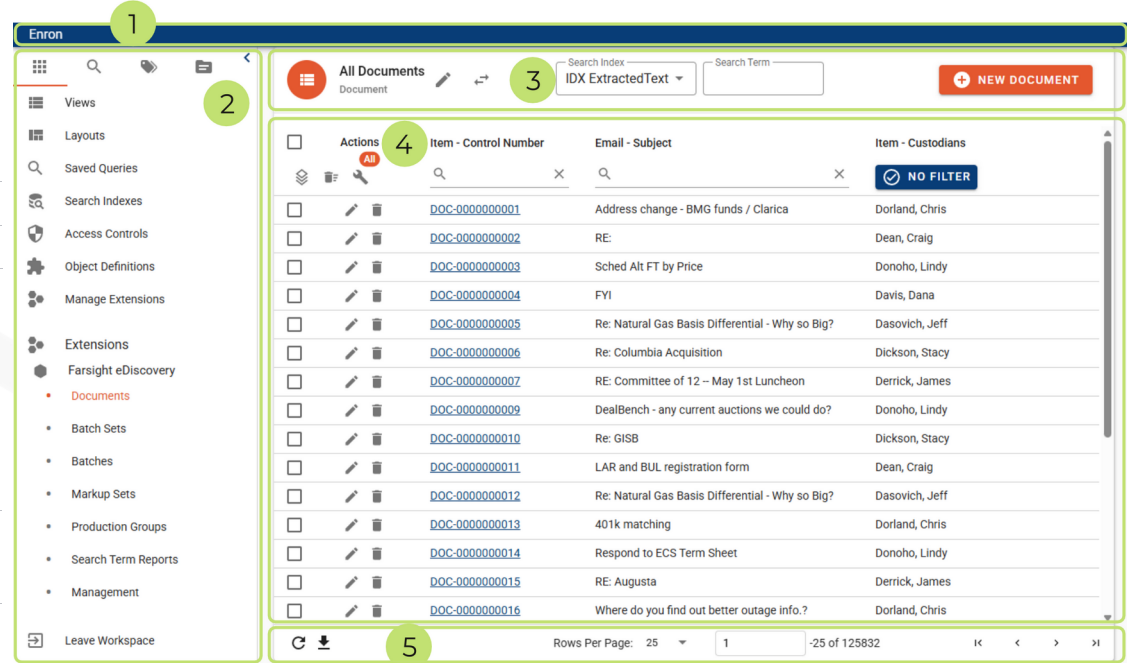
Edit the current *View*.

Open the drop-down menu to change the active *View*. The menu is also accessible by keyboard shortcut CTRL+ALT+K.

Index selection drop-down for *Index Search* (requires built index).

Search term input field for *Index Search* (requires built index).

Create a new record (if supported).



### 4. Record list

The top **checkbox** for selecting all records on the active page e.g. 25 to be used with a *Mass Action*.

Context of *Mass Action* is displayed below the label **Actions: All** records if no selection was made. Specific **record count** of the selection.

Available *Mass Actions* for the object type. In this example *Documents* have **Edit, Delete, and More Actions + Mass Conversion**

Simple column filter for text based *Fields*.

Advanced column filter for other *Field* types e.g. Date, Whole Number, Choice etc.

Every record has a checkbox for selection and dedicated **Action** buttons (**Edit** and **Delete** in this example). Holding the SHIFT key while clicking the another checkbox selects ranges of records.

The first column shows a link to enter the object or open the corresponding details.

### 5. Footer bar

**Refresh** the record list.

**Export** all records as displayed to a CSV file.

Change the record count displayed per page: 15, **25**, 50, 100, 250

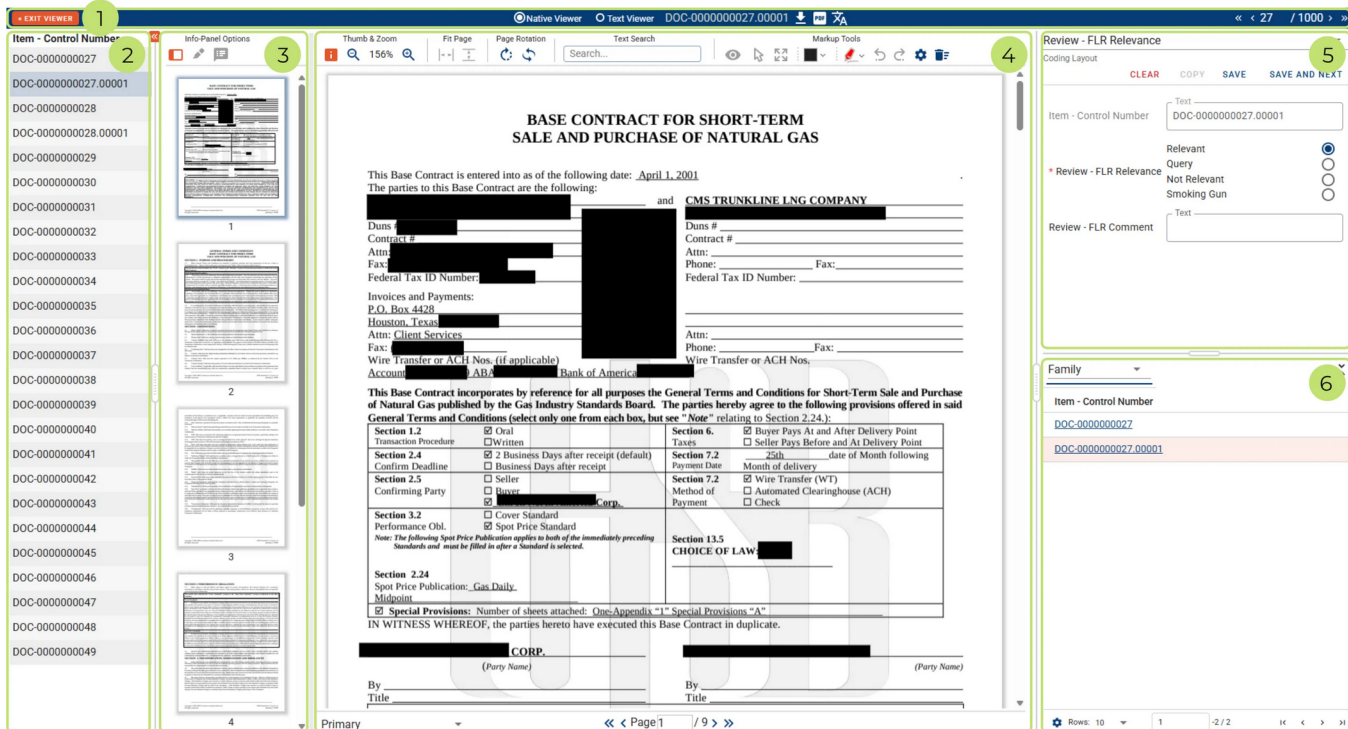
Shows currently displayed record range, including the ability to jump to a specific record, and total amount of records.

Navigate between the pages.

# User Interface Overview



## Viewer



### 1. Navigation bar

|  |                                                                                                                                                                            |
|--|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | Exit the <i>Document Viewer</i> and return to the <i>Document list</i> .                                                                                                   |
|  | Switch the display mode between <b>native</b> and <b>text</b> view.                                                                                                        |
|  | Download the native file.                                                                                                                                                  |
|  | Download the converted file. The format is PDF for documents and MP4 for media files.                                                                                      |
|  | Open the translation dialog.                                                                                                                                               |
|  | Navigate between the <i>Documents</i> . Clicking the current <i>Document</i> position unlocks an input box which allows jumping to any other <i>Document</i> in the queue. |

### 2. Document list

Quickly jump to a *Document* by clicking the corresponding list entry.

|  |                                                    |
|--|----------------------------------------------------|
|  | Collapse or expand the <i>Document list</i> frame. |
|--|----------------------------------------------------|

### 3. Info-Panel

Use the toolbar to change what the Info-Panel is showing.

|  |                                                                                |
|--|--------------------------------------------------------------------------------|
|  | Displays small preview images of pages.                                        |
|  | Displays the list of applied highlights grouped by <i>Search Term Report</i> . |
|  | Displays the list of applied markups with comment, type and page number.       |

### 4. Content view

Use the top toolbar to change page rendering, search the current *Document* and switch markup utilities.

#### Thumb & Zoom

|  |                                    |      |                                            |
|--|------------------------------------|------|--------------------------------------------|
|  | Hide or show the info panel frame. | 156% | Shows the current zoom level (20% - 400%). |
|  | Decrease the zoom level.           |      | Increase the zoom level.                   |

#### Fit Page

|  |                               |  |                                |
|--|-------------------------------|--|--------------------------------|
|  | Fit the page to screen width. |  | Fit the page to screen height. |
|--|-------------------------------|--|--------------------------------|

#### Page rotation

|  |                                 |  |                                       |
|--|---------------------------------|--|---------------------------------------|
|  | Rotate all the pages clockwise. |  | Rotate specific pages (opens dialog). |
|--|---------------------------------|--|---------------------------------------|

#### Text Search

|                      |                                                                         |
|----------------------|-------------------------------------------------------------------------|
| <input type="text"/> | Enter keyword or phrase to be searched in the current <i>Document</i> . |
|----------------------|-------------------------------------------------------------------------|

### Markup Tools

|  |                                                                                            |
|--|--------------------------------------------------------------------------------------------|
|  | Toggle the visibility of markups.                                                          |
|  | Select multiple <i>Redactions</i> .                                                        |
|  | Enters the full page redaction mode.                                                       |
|  | Draw opaque <i>Redactions</i> . Clicking the arrow opens a drop-down for type selection.   |
|  | Draw colored <i>Highlights</i> . Clicking the arrow opens a drop-down for color selection. |
|  | Undo / redo <i>Redactions</i> .                                                            |
|  | Access the <i>Redactions</i> settings dialog.                                              |
|  | Delete multiple markups (opens dialog).                                                    |

Use the bottom toolbar to switch the active *Markup Set* or to navigate between the pages.

|         |                                                                                                               |
|---------|---------------------------------------------------------------------------------------------------------------|
| Primary | Switch the active <i>Markup Set</i> .                                                                         |
|         | Navigate between pages by using the arrow buttons. Jump by entering a page number and hitting the RETURN key. |

### 5. Layout

|                        |                                                                                                                                                                             |
|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Review - FLR Relevance | The name of the active <i>Layout</i> is displayed at the top of the <i>Layout</i> frame. The arrow to the right opens a drop-down menu to switch the active <i>Layout</i> . |
| CLEAR                  | Clear the values for all editable <i>Fields</i> of the <i>Layout</i> .                                                                                                      |
| COPY                   | Copy the values from the last saved <i>Document</i> . The button becomes available once the first <i>Document</i> in queue was saved using the same <i>Layout</i> .         |
| SAVE                   | Save the applied changes.                                                                                                                                                   |
| SAVE AND NEXT          | Save the applied changes and move forward to the <b>next</b> record.                                                                                                        |

### 6. Related view

|                      |                                                                                                                                                         |
|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
| Email Thread         | The name of the relational group is displayed at the top of the related view. The arrow to the right opens a drop-down menu to switch the active group. |
|                      | Collapse or expand the related view.                                                                                                                    |
|                      | Open the <i>Field</i> selection dialog to customize the view.                                                                                           |
| Rows: 10             | The default amount of records per page is 10. Click the arrow to the right to choose another page size.                                                 |
| <input type="text"/> | Jump to a specific page by entering the number and hitting the return key.                                                                              |
|                      | Navigate between related view pages.                                                                                                                    |

## Keyboard Shortcuts

|                    |                            |                |                                  |
|--------------------|----------------------------|----------------|----------------------------------|
| CTRL + Arrow Left  | Previous Document          | CTRL + ALT + S | Layout > Save & Next             |
| CTRL + Arrow Right | Next Document              | CTRL + ALT + C | Layout > Copy (from previous)    |
| CTRL + Arrow Up    | Previous Page              | CTRL + Z       | Undo Redaction                   |
| CTRL + Arrow Down  | Next Page                  | CTRL + Y       | Redo Redaction                   |
| CTRL + Mouse Wheel | Change Document Zoom Level | ALT + K        | Quick access for drop-down menus |
| CTRL + S           | Layout > Save              |                |                                  |