

## Tag View - Folders

### Summation Express/Pro

- Folders are now called Labels in Case Explorer.
- **Creating a Label**
  1. Log in as a user with Case Administrator rights.
  2. Click the Case Review button next to the case in the Case List.
  3. Expand the Tags folder.
  4. Right-click the Labels folder and select Create Label.
  5. Enter a Label Name.
  6. Check Is Label Group if the label is a group to contain other labels and then skip to the last step.
  7. Do one of the following:
    - A) **No Color:** Select this to have no color associated with the label.
    - B) **Color:** Select this and then select a color to associate a color with the label.
- **Deleting Labels**
  1. Log in as a user with Case Administrator rights.
  2. Click the Case Review button next to the case in the Case List.
  3. Click the Tags button in the Case Explorer.
  4. Expand the Tags folder.
  5. Expand the Labels folder.
  6. Right-click the label that you want to delete and select Delete.
  7. Click OK.
- **Renaming Labels**
  1. Log in as a user with Case Administrator rights.
  2. Click the Case Review button next to the case in the Case List.
  3. Click the Tags button in the Case Explorer.
  4. Expand the Tags folder.
  5. Expand the Labels folder.
  6. Right-click the label that you want to rename and select Rename.
  7. Enter the new name for the label.
- **Managing Labels Permissions**

Case Managers can grant permissions of labels to groups for use. Groups of users can only use the labels for which they have permissions.

  1. Log in as a user with Case Administrator

### Summation iBlaze

- Folders in Tag View
- Use the **Folding** feature to create folders to categorize documents in the **Core Database**.
  1. **Personal folders** - These folders are folders to which only you have access.
  2. **Group folders** - These folders are shared by all the members in an AD Summation group.
  3. **Case folders** - These folders are shared by all the users of a specific AD Summation case.
- **Creating a Folder**
  1. From the **View** menu, select **Tag View**. The **Tagging** window is displayed in the right side of the screen.
  2. Right-click either the **Personal** or **Case** folder in the **Tagging** window. A menu is displayed.
  3. Select **Add new [Folder Name] Folder**. The **Add new [Folder Type]** folder name dialog is displayed.
  4. In the **Folder name** box, type a name for your folder. For example, you might type a witness name.
  5. Click **OK**. The new folder is added to the **Personal, Case, or Group** folder.
- **Adding Records to Folder**
  1. From the **View** menu, select **Tag View**. The **Tagging** window is displayed in the right side of the screen.
  2. Make sure the focus is on the column view of the Core Database.
  3. Gather the group of records you want to add to your folder.
  4. From the **Tagging** window, right-click the folder name to which to add records
  5. Select **Assign [Folder Name] to** from the displayed menu, then select one the following options from the sub-menu:
    - A) **Current Record** - The selected record is added to the folder.
    - B) **Marked Records** - The marked records are added to the folder.
    - C) **Unmarked Records** - The unmarked

<p>rights.</p> <ol style="list-style-type: none"> <li>2. Click the <b>Case Review</b> button next to the case in the Case List.</li> <li>3. Click the <b>Tags</b> button in the Case Explorer.</li> <li>4. Expand the Tags folder.</li> <li>5. Expand the Labels folder.</li> <li>6. Right-click the label for which you want to grant permissions and select <b>Manage Permissions</b>. Check the groups that you want to grant permissions for the selected label.</li> </ol> <p><b>Note:</b> By default, all groups that the logged-in user belongs to will be checked. To make it a personal label, all groups should be unchecked.</p> <ol style="list-style-type: none"> <li>7. Click <b>Save</b>.</li> </ol>	<p>records are added to the folder.</p> <p>D) <b>Current Results Set</b> - The records currently displayed in the column view of the Core Database are added to the folder.</p> <ul style="list-style-type: none"> <li>• <b>Deleting Folder</b> <ol style="list-style-type: none"> <li>1. In the <b>Tagging</b> window, right-click the folder that you want to delete.</li> <li>2. Select <b>Delete [Folder]</b>.</li> <li>3. Click <b>Yes</b></li> </ol> </li> <li>• <b>Renaming Folder</b> <ol style="list-style-type: none"> <li>1. In the <b>Tagging</b> window, right-click the name of the folder that you want to edit.</li> <li>2. Select <b>Edit [Folder]</b>. The <b>Edit Folder Name</b> dialog box is displayed.</li> <li>3. Type a new name for the folder.</li> <li>4. Click <b>OK</b>.</li> </ol> </li> </ul>
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