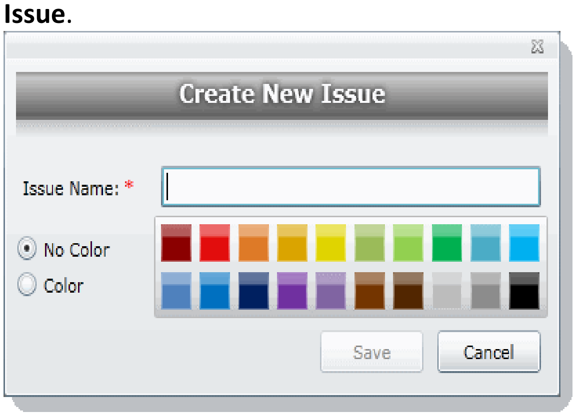
Tag View - Issues

Summation Express/Pro

- Managing Issues
  1. Case managers with *View Issues* and *Assign Issues* permissions can create, delete, rename, and assign permissions for issues
  2. Issues work like labels. Reviewers can apply issues to documents to group similar documents.
- Creating Issues
  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. Right-click the **Issues** folder and select **Create Issue**.



  6. Enter an **Issue Name**.
  7. Do one of the following:
     A) **No Color**: Select this to have no color associated with the issue.
     B) **Color**: Select this and then select a color to associate a color with the issue.
  8. Click **Save**.
- Deleting Issues
  1. Log in as a user with *View Issues* and *Assign Issues* 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 **Issues** folder.
  6. Right-click the issue that you want to delete and select **Delete**.
  7. Click **OK**.
- Renaming Issues

Summation iBlaze

- Issues in Tag View
- Adding Issues to the Issues Lookup Table
  1. From the **View** menu, select **Tag View**. The **Tagging** window is displayed on the right side of the screen.
  2. Right click **Issues** in the **Tagging** window. A menu is displayed.
  3. Select **Add new issue to Issues**. The **Add new Issue** dialog is displayed.
  4. In the **Issue** box, type the name of the issue.
  5. In the **Shortcut** box, to a short code for the issue. For example, if your issue is *Flood* you can use the shortcut *FL*.
  6. Click **Save**.
  7. The issue is added to the **Issues** list in the **Tagging** window. The issue is also added to the standard **Issues** lookup table.
- Removing Issues from the Issues Lookup Table
  1. From the **View** menu, select **Tag View**. The **Tagging** window is displayed on the right side of the screen.
  2. Right click an **Issue** in the **Tagging** window. A menu is displayed.
  3. Select **Delete Issues [Issue name]**. A confirmation message is displayed.
  4. Click **OK**.
- Adding Issues to Tags to Record
  1. From the **View** menu, select **Tag View**. The **Tagging** window is displayed in the right side of the screen.
  2. Gather the group of records you want to issue code.
  3. Open the **Core Database** in **Column** or **Form** view and select the first record. In the **Tagging** window, right click on the issue you want to add to the record.
  4. From the displayed menu, select **Assign [Issue] to**, the select one of the following options from the sub-menu:
     A) **Current Record** - The issue is added to the currently selected record.
     B) **Marked Records** - The issue is added to any marked records

1. Case managers with *View Issues* and *Assign Issues* permissions can rename issues.

- To Delete an Issue
  1. Log in as a user with *View Issues* and *Assign Issues* 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 *Issues* folder.
  6. Right-click the issue that you want to rename and select **Rename**.
  7. Enter the new name for the issue.
- Managing Issues Permissions

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

  1. Log in as a user with *View Issues* and ***Assign Issues*** 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 **Issues** folder.
  6. Right-click the issue for which you want to grant permissions and select **Manage Permissions**.
  7. Check the groups that you want to grant permissions for the selected issue.
  8. Click **Save**.
- Applying Issues to Documents
  1. After an issue has been created and associated with a user group, it can then be added to a tagging layout for coding.
  2. Create an issue.
  3. Grant permissions for the issue.
  4. Add Issues to the Tagging Layout.
  5. Check out a review set of documents. (optional)
  6. Code the documents in the review set with the issues you created.

C) **Unmarked Records** - The issue is added to any unmarked records.

D) **Current Result Set** - The issue is added to all of the records currently displayed in the column view of the **Core Database**.

- Deleting Issues Tags from Records
  1. From the **View** menu, right-click **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 from which you want to remove an issue.
  4. Right click the name of the issue you want to remove from the records, and select **Remove [Issue] from** tag from the displayed menu.
  5. From the sub-menu, select one of the following options:
     A) **Current Record** - The issue is removed from the currently selected record.
     B) **Marked Records** - The issue is removed from any marked records.
     C) **Unmarked Records** - The issue is removed from any unmarked records.
     D) **Current Result Set** - The issue is removed from all of the records currently displayed in the column view of the **Core Database**.