

Notes

Summation Express/Pro

• Adding a Note

1. Reviewers with the Add Notes permission can add notes to documents in the Natural panel of the Case Reviewer. Notes can be viewed and deleted from the Notes panel for users with the View Notes and Delete Notes permission.
2. Log in as a user with Add Notes permission.
3. Click the *Case Review* button in the *Case List* panel next to the case.
4. In the *Case Review*, ensure that the *Item List* and *Natural* panel are showing.
5. Select a document in the Item List panel that has a native application. The document shows up in the Natural panel without requiring the native application to view it.
6. In the *Natural* panel, click the **Redact** tab.
7. Click on the **Select Text** tool button.
8. Highlight the text in the body of the document to which you want to add a note.



9. Select **Add Note**.
10. Enter a note in the *Note* field.
11. Select a Date for the note
12. (Optional) Check issues related to the note.
Note: If you check an issue that has a color associated with it, the selected text will be highlighted that color.
13. Check the groups with which you want to share the note.
14. Click **Save**.

Summation iBlaze

• Adding a Note

- 1) User group should be granted rights within the Administrator Console for User Group.
- 2) Notes can be created for within Transcripts or OCR.
- 3) Open the transcript or **ocrBase** document to which you want to add a note.
- 4) Highlight the line(s) to which you want the note attach.
- 5) To attach the note use one of the methods below:
 - A) Double-click to the left of the line number where you want to add a note (the cursor will become a pointing hand).
 - B) From the **Notes** menu, select **Add Note**.
 - C) Press **Alt + A** on the keyboard.
- 6) Begin typing your note in the yellow portion of the dialog.
- 7) Use your mouse or the **Tab** key on your keyboard to move to the **Issues** box.
- 8) Click **Lookup** above the **Issues** box to associate the note with any issues.
- 9) Click the issue(s) you want to include in your note.
- 10) Click **OK** on the **Issues** lookup table.
- 11) Use your mouse or the **Tab** key on your keyboard to move to the **Date** box.
- 12) Use one of the methods below to add a date to your note:
 - A) Right-click to view a calendar.
 - B) Type a date (for example 03/20/69).
 - C) Press **F4** on your keyboard to fill the box with the current date.
- 13) Click a note type (**Standard Note**, **Thought**, and so on) icon to designate the note as a particular type of note.
- 14) Click **Save** to save the note.
- 15) Click **Close** to close the note.