

Panels and Layouts

Summation Express/Pro

- Working with Panels

You can customize the Case Review panels for your workflow. Layouts are specific to the logged-in user.

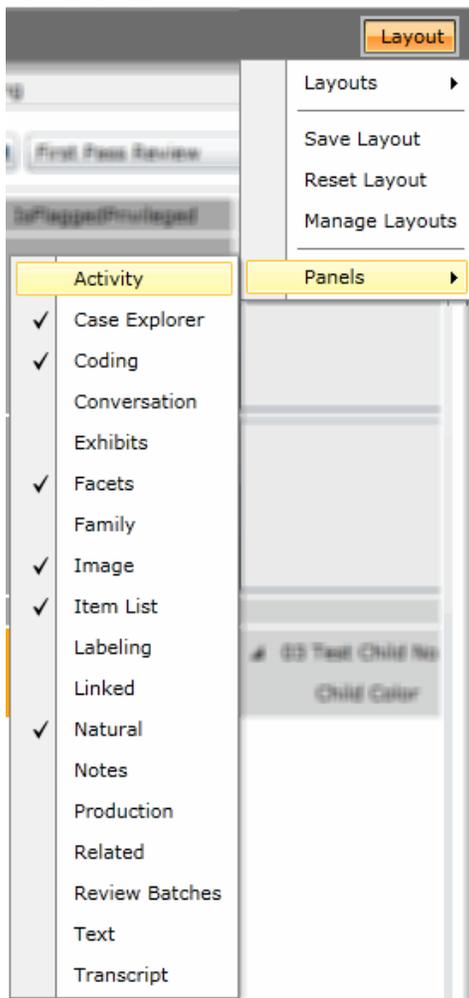
You can save custom layouts for future use.

- Hiding Panels

1. To hide a panel, do one of the following:
 - A) Click the close button (x) on the panel.
 - B) Click **Layout > Panes** and uncheck the panel you want to hide.

- Show Panel

1. Click **Layout > Panes** and check the panel from the list.



- Collapsing and Showing Panels

1. In top-right corner of the panel, click  .
The panel is collapsed and the name of the

Summation iBlaze

- Layouts

iBlaze allows you to modify the layout of windows and save the layouts for future use. For example, you may want to view the **Core Database, Image Viewer, and ocrBase** simultaneously. You would layout your screen with the windows as you want them to appear, and then save the layout. The layout would then be stored in the **Layouts** folder. Click the plus sign next to the **Layouts** folder to display all of the available layouts.

1. Basic Document Review
2. Basic Transcript and Exhibit Review
3. Column and Image
4. Docked Explorer
5. Document Text & Image Review
6. EDD Document Review
7. Note Style Document Review
8. Transcript and Image
9. Double-click the layout you want to use. Right-click the Layouts folder to save layouts. Saved layouts are stored in the Layouts folder.

panel is displayed in a box on the left side. If the panel was in the top half of the page, the collapsed panel name is displayed in the top-left corner. If the panel was in the bottom half of the page, it will be displayed in the bottom-left corner.

2. To un-collapse a panel, view the panel, and in the top-right corner of the panel, click



- Moving Panels

You can move panels to different locations in the Case Review page. When you move a panel, you can position it in one of the following ways:

1. Click and drag the panel that you want to move. Docking guides appear on the page.
2. Place the panel by doing one of the following:
 - A) **Floating:** Leave the panel floating on top of the page.
 - B) **Docking to a location on the page:** Dock the panel by dragging the panel to one of the docking guide arrows and releasing the mouse button. There are four page docking guides on the outside of the page.
 - C) **Docking as a tab on another panel:** Drag the panel on top of another panel and onto the center of the docking cluster and release the mouse button. There is a cluster of four page docking guides on the panel.

- Working with Layouts

- Resetting Layouts

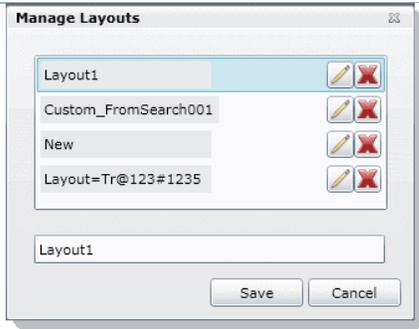
1. Select **Layout > Reset Layout.**

- Saving Layouts

If you have customized the default layout, you can save it as a custom layout. You can save multiple layouts.

To create a second custom layout, you must first return to a default layout, modify it, and then save it. If you make changes to a custom layout, and save it, it will save it as an update.

1. Customize the layout.
2. Click **Layout > Save Layout.**



3. Enter the name of the layout and click **Save**.

- **Selecting a Layout**

1. You can view default layouts and custom layouts that you have saved in Case Review.

The following are the available default layouts:

- A) **Search Layout:** Designed to aid reviewers in searching documents
- B) **Culling Layout:** Designed to aid reviewers in culling documents
- C) **Review Layout:** Designed to aid reviewers in viewing documents
- D) **Transcript Layout:** Designed to aid reviewers in working with transcripts

- **Managing Saved Layouts**

You can rename and delete custom layouts that you have saved. You cannot delete the currently selected layout using the Manage Layouts dialog.

1. Select **Layout > Manage Layouts**.
2. To rename a layout, select the layout, and enter a new name.
3. To delete a layout, click the **X** next to the layout, and click **OK**.
4. Click **Save**.