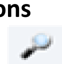
Viewing Summary Records Grid View/Column Display

Summation Express/Pro

- **Assigning permissions in Permission Tab**
- **Permissions are will need to be granted to user's in order for them to view Summary Records in the "Grid View"**
    1. **Permission Tab.**
    2. **Case Roles; Assigning Roles for User.**
    3. **Case Roles Permissions; Grant "view rights" for user and/or Group.**
    4. **Once the permissions have been granted to the user or user group to have "view rights" a Document Label will need to be created.**
- **Document 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. **Click the Tags**  **button in Case Explorer.**
    4. **Expand the Tags folder.**
    5. **Right-click the Labels folder and select Create Label.**
    6. **Enter a Label Name.**
    7. **Check Is Label Group if the label is a group to contain other labels and then skip to the last step.**
    8. **Do one of 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. *Note: The default color is black if you select the color option. The color selected appears next to the label in the labels folder.**
    9. **Click Save.**
    10. **Once the label has been created you will need to Manage the Label Permissions.**
- **Manage the Label Permissions**
    1. **Click the Case Review**  **button next to the case in the Case List.**
    2. **Click the Tags**  **button in Case Explorer.**
    3. **Expand the Tags folder.**
    4. **Expand the Labels folder.**
    5. **Right-click the label for which you want to grant permissions and select Manage Permissions.**
    6. **Check the groups that you want to grant permissions for the selected label.**

Summation iBlaze

- Assigning permissions in **Administrator Console**
    1. Group Admin Tab
    2. User Options
    3. Add User to System
    4. Group Options
    5. Add User to Summation Group
- Assigning permissions to Group
    1. Groups Tab
    2. Select **Group** under **Groups**.
    3. Choose permission under the **Permissions** section.
        - A)User will need to have at least view rights to view Column. Under **Database > Can Open Column View**.
- Opening Column View (Grid View)
    1. **Case Explorer**
    2. Double click on **Core Database**
    3. View on **Column** Tab
    4. Alternate way to view column view:
        - A)**Layouts > Column and Image**
        - B) **View > Core Database**

Note: By default, all groups that the logged-in user belongs to will be checked. To make it a personal label, all groups should be un-checked.

7. **Click Save.**
8. **The final step will be creating a Document Group.**

- **Document Group**

1. **Remained logged in as Case Administrator.**
2. **Click the Case Review**  **button next to the case in the Case List.**
3. **In the Case Explorer, right-click the Document Groups folder and select Create Document Group.**
4. **Enter a Name for the document group.**
5. **Enter a description for the document group.**
6. **Click Next.**
7. **Check the labels that you want to include in the document group.**
8. **Check Next.**
9. **Select the Re-Number Documents radio button if you want to renumber the documents in the group (Enter info for Prefix, Suffix and such).**
10. **Click Next.**
11. **Review the Summary and click Create.**
12. **Click OK.**