

Using Markup Sets

Summation Express/Pro

- **Configuring Markup Sets**
 1. Markup sets are a set of redactions and highlights performed by a specified group of users.
 2. For example, you can create a markup set for paralegals, when paralegal reviewers perform annotations on documents in the Case Review, all of their markups will only appear when Paralegal is selected as the markup for the document in the Natural panel.
- **Creating a Markup Set**
 1. Before you can assign a markup set to a user or group, you must first create the markup set on the Home page. Case managers with the Case Administrator permission can create, edit, and delete markup sets.
 2. On the Home page, click on the Markup Sets tab.
 3. Click the Add button.
 4. In the Markup Set Detail form, enter the name of the Annotation Set.
 5. Click OK.
- **Associating a User or Group to a Markup Set**
 1. If you are a user with the Case Administration rights, you can associate users or groups to markup sets. Once associated, annotations that the user performs in the Case Review will appear on the document in Native panel when the markup set is selected.
 2. On the Home page, click on the Markup Sets tab.
 3. Select the markup set that you want to associate to a user or group.
 4. Click the User or Group tab at the bottom of the page.
 5. Click the Add Association button.
 6. In the All Users or All User Groups dialog, click the plus sign to add the user or group to the markup set.
 7. Click OK.
- **Selecting a Markup Set**
 1. Case review, click the Case Review button next to the case in the Case List panel.
 2. 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.
 3. In the Natural panel, expand the Markup Set drop-down and select a markup set.

Summation iBlaze

- Create Image Markups (Stamps, Redactions, Highlights, Graphics)
- Create OCR Highlights.
- Create Transcript Highlights.