

# **Reveal 10 Review**

**Getting Started** 



# Table of Contents

Log in to Reveal
Setting Up Two-Factor Authentication – Mobile Devices
Open Existing Project
Interface Layout
Document Management Screen
Document Review Screen
Key Feature Overview
Document Management - Features9
Document Review - Features
Project Administration
Permissions
Field Management
Tag Management
Wordlists
Settings
Key Al Features15
AI Case Models
AI Exploratory Search

# Log in to Reveal

#### Setting Up Two-Factor Authentication – Mobile Devices

The Reveal platform includes two-factor authentication which is added layer of security that goes beyond the standard login credentials for the platform. To setup your two-factor authentication, follow these steps.

- 1. Download the *Google Authenticator* app to your mobile phone. On Android devices, this will be found on *Google Play* and the *Apple Store* for Apple devices.
- 2. Once installed, launch the application.
- 3. Press the **Add** button "+" in the lower right-hand corner of Google Authenticator.



#### **Google Authenticator**

4. Click on Scan QR Code.



- 5. There is a QR Code provided on the Reveal login screen. Hold your phone's camera up to the code to scan it.
- 6. Once scanned, a Reveal labeled six-digit code will appear within Google Authenticator. This code will change every 30 seconds.



7. Navigate to the Reveal login screen and enter your login credentials (username and password).

Reveal Log In Screen

	<b>`</b>	
05 Denie	,	
Log In		
Username or email		
mgriffin@revealdata.c	om	
Password		
Forgot Password?		
	LOG IN	

8. When prompted, enter the six-digit code displayed within Google *Authenticator*.

- 9. Enter a name for the device that has Google Authenticator installed. For example, you can enter "iPhone" or "android" depending upon your mobile device.
- 10. Click **Submit** to complete the setup of the *Two-Factor Authentication*.
- 11. Going forward, each time you login to Reveal, you will be required to enter the six-digit code provided by Google Authenticator.

Google Authenticator Code Ent	ry Screen
Reveal Universal ID mgriffin@revealdata.com	
One-time code	
LOG IN	
Restart login	

# **Open Existing Project**

Follow these steps to open an existing project within Reveal.

**Definition:** Project – a project is generally equivalent to a specific legal matter or case. Projects contain a set of documents to be analyzed and reviewed. More complex matters can have more than one project.

1. After logging in to Reveal, the project selection popup window will appear if you have access to more than one project. If you have access to only one project, Reveal will open it automatically.

Select Project		
Search		Q
Project	Company	
2.90 Test	Reveal	
Eugene Demo	Reveal	
Project Green	Reveal	
V10 Demo	Reveal	
	and the second	100

## Draiget Coloction C

2. If you have access to multiple projects, select the appropriate project from the available list.

# **Interface Layout**

There are several screens within Reveal's intuitive user interface that are essential for document review. Here's an overview of each screen including their function and key features.

## **Document Management Screen**

Document Management is the default screen that appears after you select an existing project from the Project list. Here, users can organize, search, and manage the list of documents within a project. The following diagram provides an overview of the screen layout along with a list of functions that can be performed.



**Folders Panel** – displays a set of default folders and any custom folders created to organize documents within the project



**Search Box** – enter keyword searches, build more complex searches, review search history, or refine an existing saved search.

**Bulk Action Toolbar** - Perform a series of actions on a single document or subset of selected documents such as Tagging, Exporting, Printing, etc.



5

3

**Document List** – displays a list of documents based on a search or folder.

**List Control Panel** – allows you to perform additional document filtering, control which fields are displayed, and determine how the documents are sorted within the Document List.



**Document Navigation Tools** – navigate sets of displayed documents and controls how many documents to display per page.



**Field Profile & Tag Toolbar** – select which Field Profile to use when viewing documents within the Document List, select the Tag Profile to use for review, and view a list of Reviewed or Not Reviewed documents within the entire project or subset of document



**Sort Toolbar** – sort the Document List using the various options provided including *has tags, has annotations, has duplicates,* etc.

		3	7	
8		Т	Y	
		(4)		
Project Green -		1 1	🕐 Help 🚊 Su	pport
< Q. Seach	# 幸		Fields: Default  Tags: Responsive 1	LR  All documents
tag la Assign ta Sample d	≥ Export ⇔ Print ⊨ Label ◆ OCR ⊕ Translate ⊨ T	ranscribe Delete	¥ <sub>X</sub> Filter Ⅲ Fields Ⅱ Sort	1-25 of 368790
tow 🗆 🗅 삼 🗘 🛆 🕰	DD C S A Begin Number Attach 🝸	Custodian 🍸 File Display 🍸	Foreign Languages	Master Date 🕎 Time
	PREPROD_00000019	Testing	English 99%	10/20/2021 7:40 PM
2 🗆 🖹	PREPROD_00000020	Testing	English 14%	10/20/2021 7:40 PM
3 🗆 🖂 🕞 🛇 📀	PREPROD-0000001	Allen, Philip Re: Denver trading	English 99%	3/19/2001 9:25 AM
4 🗆 🖂 🕓	PREPROD-0000002	Allen, Philip West Desk	English 99%	7/19/2001 1:52 PM
5 🖂 🖓 🛇 🝳	C 12 3 PREPROD-0000003	Allen, Philip Utility Construction E:	English 99%	8/6/2001 7:10 PM
6 🗆 🕅 🖓 🛇	PREPROD-0000003	Allen, Philip Utility Construction E:	English 99%	8/6/2001 7:10 PM
7 🗆 🖂 🖸	LS PREPROD-0000005	Allen, Philip Revised Utility Constr	English 99%	8/13/2001 3:47 PM
8 🖸 🗟 🛇	LS PREPROD-0000005	Allen, Philip 3M@X05!.DOC	English 99%	8/13/2001 3:47 PM
9 🖸 🖂 🖸 🛇	PREPROD-0000007	Allen, Philip RE: Special Warranty	English 99%	8/14/2001 6:43 PM
10 🛛 🖂 🖗 🛇	C 12 53 PREPROD-0000008	Allen, Philip Special Warranty Dee	English 99%	8/14/2001 2:01 PM
11 🗆 🖂	LS PREPROD-0000008	Allen, Philip Special Warranty Dee	English 99%	8/14/2001 2:01 PM
12 🖸 🔯 🕓	PREPROD-0000008	Allen, Philip First Amendment to C	English 99%	8/14/2001 2:01 PM
13 🗆 🖂	분 5 PREPROD-0000011	Allen, Philip Reimbursement Agree	English 99%	8/14/2001 7:49 PM
14 🗔 😡 🛇	LS PREPROD-0000011	Allen, Philip 3_6X01!.DOC	English 99%	8/14/2001 7:49 PM
15 🖸 🖂	C 12 5 PREPROD-0000013	Allen, Philip Positions	English 99%	10/16/2001 7:45 PM
16 🔲 🖹 📿	LS PREPROD-0000013	Allen, Philip transportpositions.xls	English 99%	10/16/2001 7:45 PM
17 🖸 🖂	PREPROD-0000015	Allen, Philip GMC's Bold New SUV	English 99%	10/17/2001 9:40 AM
18 🖸 🖂	PREPROD-0000016	Allen, Philip MSFT Downgraded by	English 99%	10/17/2001 9:19 PM
19 🗆 🖂	PREPROD-0000017	Allen, Philip Huntley followup que:	English 99%	10/17/2001 9:25 PM

### **Document Review Screen**

Document Review is the primary screen used to review individual documents. Users will review individual documents here and apply coding decisions using Tag Profiles. Document level actions are also available including the ability to print, delete, and email individual. A diagram of the screen layout has been provided below.



**Field Panel** – displays all metadata fields for the selected Field Profile and document displayed.



**View Options** - Select the document format you would like to be displayed in the Document Panel



**Review Toolbar** - Contains a set of buttons that execute various commands on the document displayed



**Document Viewer** - the current document in the format selected within the View Options



Coding Panel - Displays the Tag Profile being used for review



**Doc Family Panel** - Displays the document family members for the document displayed



## **Key Feature Overview**

#### **Document Management - Features**



**Project Selection** – Use this drop to change projects.

#### **Bulk Action Toolbar**

- Tags apply tags to one or more selected documents •
- Assign create batch of documents for review. Unassign a batch of documents
- Sample create a random sample of documents by count, percentage, or confidence
- Export export a list of selected documents. You have the option of exporting the selected files in their native format.
- Print print the selected documents to PDF or to a local network printer
- Label generate text descriptions (image labels) for a select group of imagebased files. The image labels provide a brief description of image for search and review purposes.
- OCR perform OCR on a selected group of image-based files to extract any text embedded within the image.
- Translate translate a select set of documents from their current language to another.
- Transcribe convert the audio from audio and video files into searchable text •
- Delete delete selected documents. You have the option of deleting all data • associated with documents including image sets, annotations, notes, tags, etc.
- 3 Search Box enter keywords to search.
- 4 ID Search enter specific document identifiers to search for
- 5 More Search Options build custom searches that include multiple conditions. Refine saved searches and recall a previous search from Search History.
- **6** Folder Refresh refresh the list of folders displayed. This is required whenever you or another user creates a folder that you have access to.



- 7 My Assignments view you assigned review batches
- 8 Work Folders view the list of custom created folders you have created to
- 9 Searches provides you with access to saved searches and your search history
- **10** Quick Searches provides a list of out-of-the-box saved searches that are commonly used in document review

10

- **Document Select** Open a specific document within the document list
- 13 Settings customize view settings including enabling Dark Mode, Show Alternating Row Color in Grid, Show Row Numbers, etc.

					1	1						
	6		3				4	2				13
	📃 📕 Review Project Green 🕶 🏦										🕲 Help 🙎 Su	upport
	🕒 Folders 🤗 🛛 🗸	Q. Search					# 幸			Fields: Default 🔻	Tags: Responsive	ILR • All documents
	> Documents		in E Samol		voort	Print	label @ OCR @ Translate	Transcribe		S. Eilter	Eields II Sort	C 1-25 of 36879
	My Assignments     Chewco Review00031 (255)     Robs Set00048 (3)	Row 🗆 🗅 a	800	▲ ♀ [	200	0 # 5	🔒 Begin Number Attach 🏾 🍸	Custodian 🛛	File Display V	Foreign Languages	Y	Master Date 💡
	Work Folders	1 🗆 🙆		Q			PREPROD_00000019	Testing		English 99%		10/20/2021 7:40 PM
	Transcripts     Quick Entities	2 🗆 🕅					PREPROD_00000020	Testing		English 14%		10/20/2021 7:40 PM
Н	Searches	3 🗆 🖂	0 🛇				PREPROD-0000001	Allen, Philip	Re: Denver trading	English 99%		3/19/2001 9:25 AM
	Quick Searches     Admin Views	4 🗆 🖂	$\odot$		2 (	0 80	PREPROD-0000002	Allen, Philip	West Desk	English 99%		7/19/2001 1:52 PM
	Admin views	5 🗆 🖂	0 🛇		(	0 13 5	PREPROD-0000003	Allen, Philip	Utility Construction E:	English 99%		8/6/2001 7:10 PM
		6 🗆 🔛	0		0	ta	PREPROD-0000003	Allen, Philip	Utility Construction E	English 99%		8/6/2001 7:10 PM
		7 🗆 🖂	0 🛇			12	PREPROD-0000005	Allen, Philip	Revised Utility Constr	English 99%		8/13/2001 3:47 PM
		8 🗆 🔛	$\bigcirc$			tg	PREPROD-0000005	Allen, Philip	3M@X05!.DOC	English 99%		8/13/2001 3:47 PM
	10	9 🗆 🖂	0 🛇				PREPROD-0000007	Allen, Philip	RE: Special Warranty	English 99%		8/14/2001 6:43 PM
		10 🗆 🖂	0 🛇		(	0 tt <b>S</b>	PREPROD-0000008	Allen, Philip	Special Warranty Dee	English 99%		8/14/2001 2:01 PM
		11 🗆 🔛				ťS	PREPROD-0000008	Allen, Philip	Special Warranty Dee	English 99%		8/14/2001 2:01 PM
		12 🗌 🔛	$\bigcirc$		(	0 ta	PREPROD-0000008	Allen, Philip	First Amendment to C	English 99%		8/14/2001 2:01 PM
		13 🗌 🖂				t2 🚰	PREPROD-0000011	Allen, Philip	Reimbursement Agree	English 99%		8/14/2001 7:49 PM
		14 🗆 🔛	$\bigcirc$			ťS	PREPROD-0000011	Allen, Philip	3_6X01!.DOC	English 99%		8/14/2001 7:49 PM
		15 🗌 🖂			(	0 tt 🗗	PREPROD-0000013	Allen, Philip	Positions	English 99%		10/16/2001 7:45 PM
		16 🗌 🖹				tg	PREPROD-0000013	Allen, Philip	transportpositions.xls	English 99%		10/16/2001 7:45 PM
		17 🗌 🖂					PREPROD-0000015	Allen, Philip	GMC's Bold New SUV	English 99%		10/17/2001 9:40 AM
		18 🗌 🖂					PREPROD-0000016	Allen, Philip	MSFT Downgraded by	English 99%		10/17/2001 9:19 PM
		19 🗌 🖂				51	PREPROD-0000017	Allen, Philip	Huntley followup que:	English 99%		10/17/2001 9:25 PM



#### **Document Review - Features**





# **Project Administration**

Users that are in a project management or administration role will have access to more advanced features including user permissions, field management, tag management, Wordlists, and other settings. The following section provides an overview of the key features associated with each of these administration functions.

## Permissions

Users that are in a project management or administration role will have access to more advanced features including user permissions, field management, tag management,

- **Roles** This is where the user access is defined. A Role tells the system what features and functions a user will have access to. There are 5 standard roles pre-defined within Reveal. You can add additional Roles as needed.
- **Role Groups** used to organize individuals with the same Role into groups of similar users with similar permissions.

• **Teams** – used to group individuals together that will be performing a specific task or tasks within the review workflow. An example would be to create a team that's going to responsible for the 1<sup>st</sup> Level Review, project management, or Privilege Review.

#### **Permissions Screen**

Project Admin Project Admin Project Admin	roject Green 🔹 🎢 nts Fields Tags Redact	ons Wordlists Loading Production Templates Settings	⑦ Help ▲ Support ⑧ Settings MG
Permissions 2 < Teams	+ Add 🕼 Edit 💼 Delete	Assign Permissions	1-5 of 5
Tearins	Role Name	Description	
Role Groups	Administrator	All permissions, including deleting documents and managing user permissions.	
Notes	Client Administrator	All permissions, except those related to managing user permissions and deleting documents.	
	Expert	Expert witness with limited access	
	Power Reviewer	Reviewer permissions, plus all documents view, my views, quick entities, power search, bulk tag, and public item management.	
	Reviewer	Basic reviewer options, plus redact and bulk tag of related documents. See permissions for more information.	

## **Field Management**

Create **Field Profiles** that are used for document review. Each Field Profile includes a list of specific fields that will be viewable during document review and will be assigned to specific **Teams**. Reveal also provides a Default Field Profile for each new project. You can also modify which fields are included in the default profile.

#### Field Management Screen

Permissions Assignment	roject Green 👻	ណ៍ ags Redactions Wordlists Loading	Production Templates Settings		(?) He	lp 🖀 Support	Settings MG
🗆 Fields 🖯 🛛 🔍	+ Add 🕜 Edit	t 💼 Delete 🛛 🛱 Display Order 🛛 👖 Sort Order	🐣 Assign Teams 🛛 Assign Fields				1-10 of 10
Field Profiles	Profile Name	Is Default	Teams				
Search Profiles Manage Fields	Default		Original Administrators				
Add Fields	All Fields		Original Administrators				
	Brainspace		Original Administrators				
	SEC Production		Original Administrators				
	Email Threading		Original Administrators				
	Active Learning		Original Administrators				
	Demo		Original Administrators				
	Bill's Profile		UFL				
	Privileged Fields		Original Administrators				
	UFL		UFL				

## **Tag Management**

Create **Tags and Tag Profiles** that are used code documents during review. Each project can have a set of custom review Tags. Once tags are created, they can be added to a **Tag Profile** (organized grouping of specific tags). The Tag Profiles will be visible within the Document Review Screen.

#### Tag Management Screen

Project Admin Project Green		🕲 Help 🔰 Support 🐵 Settings 🗰
Permissions Assignments Fields Tags Redactions Wordlists Loading Productio	n Templates Settings	
Tags Fields		Tag profiles CD_TagProfile 🔹 🖉 Settings 💼 Delete 💿 Add new profile
Add Tag and Choices III View Shortcuts	Collapse All	Add Pane     Collapse All
✓ Billy Best Tag ⊗ O Yes the best O O No its not 9		Review III Constraints IIII Constraints IIIIII Constraints IIII Constraints IIIII
<ul> <li>✓ Chicago Tag</li> <li>□ City S</li> <li>□ Suburbs S</li> </ul>		O Non-Response O O Further Review Required O Tech Issue
Confidentiality Designation     O CONTREMING.     O ATTORNEYS PYES ONLY     O PUBLIC     O PUBLIC	e 🖉 💼	V Privileged W O Insteringed O O Privileged - Do Not Produce D O Privileged - Poduce Redected D V Financial Dia (S)
Confirmation     O Confirmed - 2LR     O Overturn - 2LR	₩ Ø 🗊	O Finance VisiÓ O Finance No Q
	₩ Ø 🗊	Drag tags or fields from the left and drop them into a pane on the right.
	₩ Ø 🗎	
	₩ Ø î	
<ul> <li>✓ I saves</li> <li>□ crewco (3)</li> <li>□ crew (3)</li> <li>□ un (3)</li> <li>□ un (3)</li> <li>□ RupToR (3)</li> </ul>	₩ Ø î	
(6) err ter T. ~ О л. Ves Δ О л. No Ф	ee 🖉 î	
∨ Misbehaviour ⊗ O Yes D	□ 2 îi	

## Wordlists

Users can upload lists of search terms for search term hit highlighting. These search term lists are referred to as **Wordlists** in Reveal. **Wordlists** can be created per review team. Users can also run a hit report on the list of terms and place the search results into a Work Folder, Saved Search, and/or a Field.

#### Wordlist Screen

Permissions Assignment	oject Green ▼ ấấ hts Fields Tags Redact	ions Wordlists Loading Production Te	nplates Settings		⊕ Help      ≜ Support      ⊕ Settings      MG
E Wordlists Ø <	+ Add 🗭 Edit 💼 Delete	🐣 Assign Teams			1-2 of 2
rigniignts	Name	Teams	Words	Highlight color	
Hit Reports	Privileged	Original Administrators	enron oil deposition subpoena	Example	
	New Name	Original Administrators, Privilege, Responsive 1LR, Responsive 2LR, UFL	"exercised stack options" inong term incentive" restricted stack deferred incente director fees LMH - CIENCE JUE RAPTOR I lana advances Peregrine OR Americe OR Bindo B Whitewing OB Candro G R "Screening Eagle" OR 'UIB Forward' raptor' OR exotic OB (edf) CR chevco OR HTM OR costless OR netwo Amahide AND Sprey Pelcian Timberrol Grizzy Ouclaider Merganous adary Sanyib CR (edg) (	Example	

## Settings

Settings provides users with the ability to customize the view options globally for all users within the project. This allows you to create a standard default view for all

members of your review team. These view options can be customized at a user level. The view options include but are not limited to:

- **Dark Mode** turn on dark mode for all team members which creates a dark background with lighter colors in the foreground.
- Alternating Row Color in Grid change the Document List view within the Document Management screen to include alternating row colors.
- **Review Icons** customize which icons to display in the Document List. These icons, which can be used to sort documents, depict which documents have tags, duplicates, annotations, notes, etc.

# **Key Al Features**

## AI Case Models

Al Case Models are models that are designed to prioritize document review by using machine learning to train the system to automatically identify documents related to a specific issue or event. For example, you can build a Case Model to find documents that are likely to be relevant to a specific legal matter. You can also build a model to find documents that are likely to be privileged.

To create an AI Case Model, please follow the directions below to create an AI Tag:

- 1. Create a tag that will be used to train the model (Example: Responsiveness)
- 2. Enter a choice for the tag (Example: Responsive)
- 3. Select the option Prediction Enable
- 4. Enter a 2<sup>nd</sup> choice for the tag (Example: Non-Responsive)
- 5. Click Add to save the new tag
- 6. Add the new tag to an existing **Tag Profile** or create a new **Tag Profile** and then add the new tag to the new profile

#### Create Tag Screen

🟷 Add Tag and	Choices				×
Responsiveness					
Multi-Select			•		
Add new choice	1 Move up	↓ Move down	📋 Delete		1-2 of 2
Choice name			Prediction	Enabled	Privileged
II Responsive				3	
Ⅲ Non-Responsive			E	]	
н < 1 ≻ н				1 of	1 10 per page 🔻
Prediction AI Access	No users/tean	ts with access	Edit access		
Options	Updatable	in the review s	creen		
Auto Update	Family Me	mbers 🗌 Near	Duplicates	Duplicates	Email Threads
					Cancel ADD

Last Update: 3/4/2022

As reviewers begin using the new **AI Tag** to code documents, the system will utilize those human coded decisions to train the Case Model. This process runs every few minutes. When the process completes, a score between 0 and 100 is assigned to each document within the project. Documents with scores closer to 100 are more likely to be Responsive whereas documents with scores closer to 0 are less likely to be Responsive.

You can also create an **AI Tag** that scores documents for multiple issues. An example of this would be an AI Tag called "Fraud" where the individual choices could be IP Theft, Compensation, Stock Trading, etc.

## AI Exploratory Search

Reveal also provides users with the ability to leverage its AI powered **Exploratory Search** feature. To use this feature, follow the steps below:

- 1. Click on the hamburger icon in upper left-hand corner of the screen
- 2. Click on Project Admin
- 3. Click on the **Settings** tab
- 4. Click on the Artificial Intelligence tab on the right-hand side of the screen
- 5. Click the Enable Artificial Intelligence checkbox.
- 6. Refresh your browser
- 7. Now click on the hamburger icon in upper left-hand corner of the screen
- 8. Click on Artificial Intelligence
- 9. Use the **Exploratory Search** feature located at the top of the screen to search for specific terms, people, places, etc.