

Nebula™

Reviewer Quick Start Guide

June 2022



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Welcome to Nebula

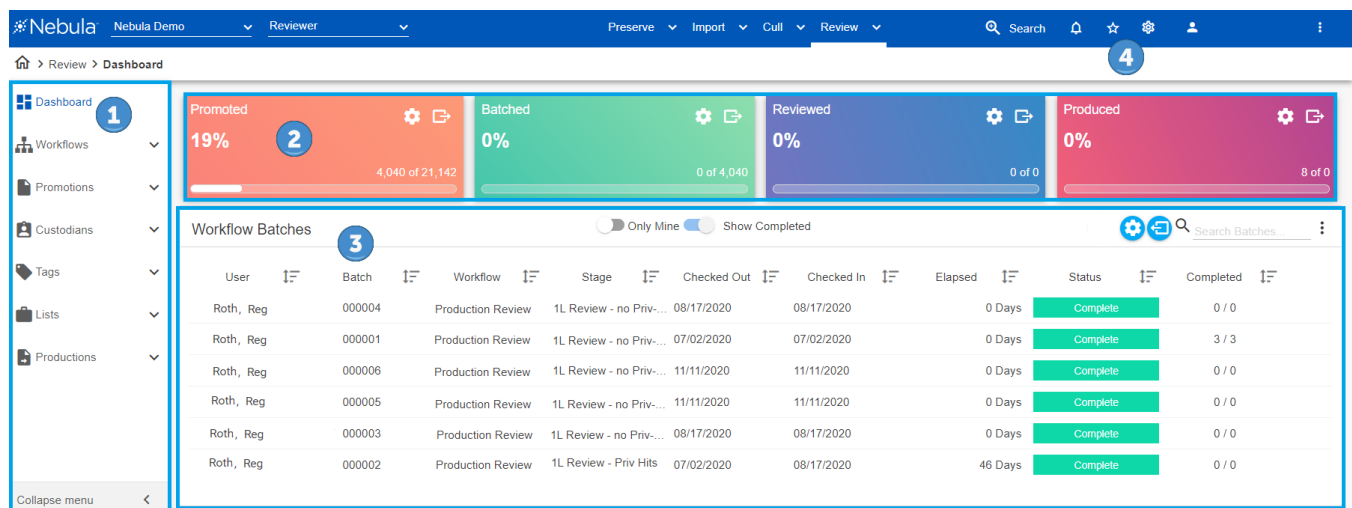
Nebula is an end-to-end ediscovery solution that maximizes productivity with loads of cutting edge features, while providing an intuitive and easy to learn experience for end users.

This Quick Start Guide explains the key features found within Nebula Review.


Review Dashboard

The Review dashboard (Review > Dashboard) provides an overview of the progress of each matter and access to batches of documents on the Document List.

Note: Depending on the user's permissions, some of these elements may not be available.

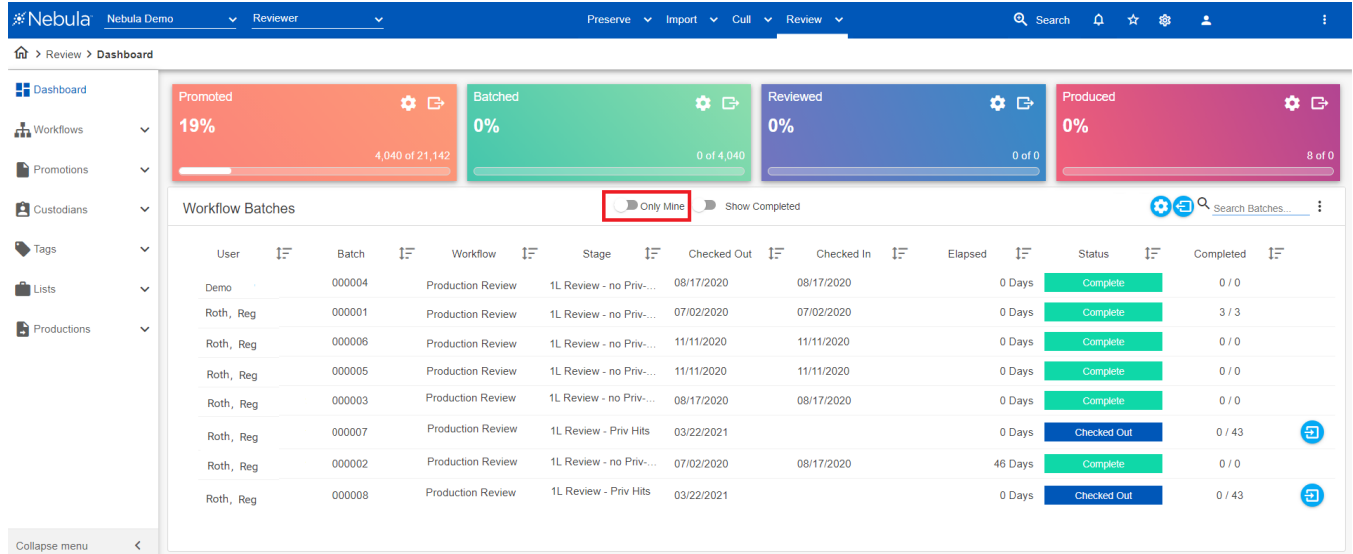


You can open the Document List from each of the following access points:

1. **Explore menu:** Groups documents in folders by common categories within each matter.
2. **Review cards:** Displays fully customizable metrics that track review progress in real-time.
3. **Workflow Batches:** Lists the batches assigned to each user by workflow. Reviewers can access their own batch sets by clicking Checkout and then selecting the next batch from either any topic or a topic of their choice.
4. **Favorites and Recents** : Enables users to revisit document lists and searches flagged as "Favorites" or have been recently viewed.

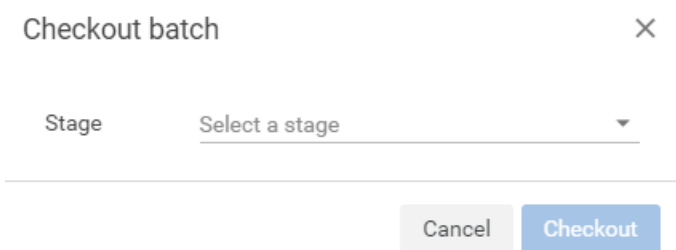
Workflow Batches

The Workflow Batches section displays all the batches you are currently assigned, as well as each one's status.



To checkout batches

1. In the Workflow Batches section, click the **Checkout** icon .



2. On the Checkout batch window, select the **Stage** of the workflow you want to checkout the batch from.
3. Click **Checkout**.

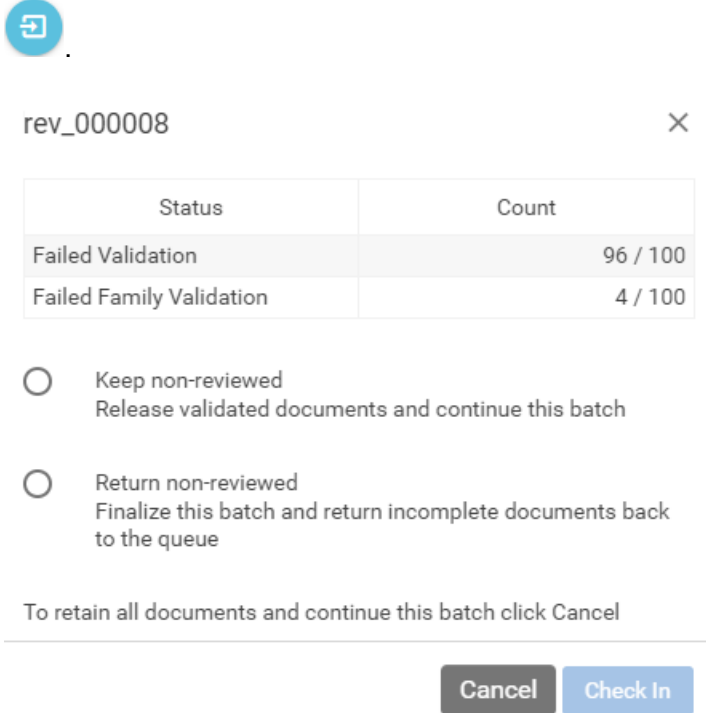
The selected batch appears in the Workflow Batches section.

To open workflow batches

- In the Workflow Batches section, double-click the batch you want view.
The Document List displays the contents of the batch.

To check in batches

1. In the Workflow Batches section, locate the batch you want to check in and click its **Check In** icon



rev_000008 ×

Status	Count
Failed Validation	96 / 100
Failed Family Validation	4 / 100

Keep non-reviewed
Release validated documents and continue this batch

Return non-reviewed
Finalize this batch and return incomplete documents back to the queue

To retain all documents and continue this batch click Cancel

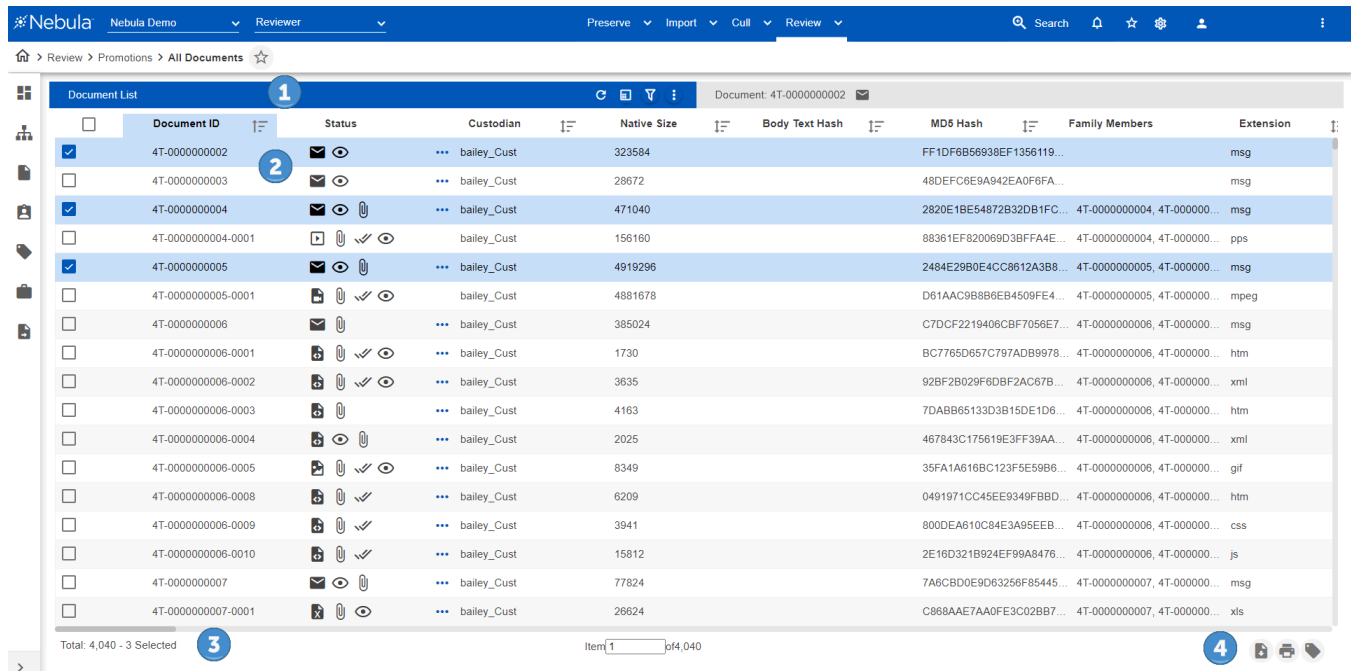
2. On the [Batch] window, view the Status of the batch.
3. *If the batch failed validation*, choose one of the following:
 - **Keep non-reviewed**: Release validated documents and continue reviewing the batch.
 - **Return non-reviewed**: Finalize the batch and return incomplete documents to the queue.

To retain all documents and continue reviewing the batch, click **Cancel**.
4. *If the batch passed validation*, click **Check In**.
5. *If the batch is empty*, click **OK** on the confirmation window.



Document List

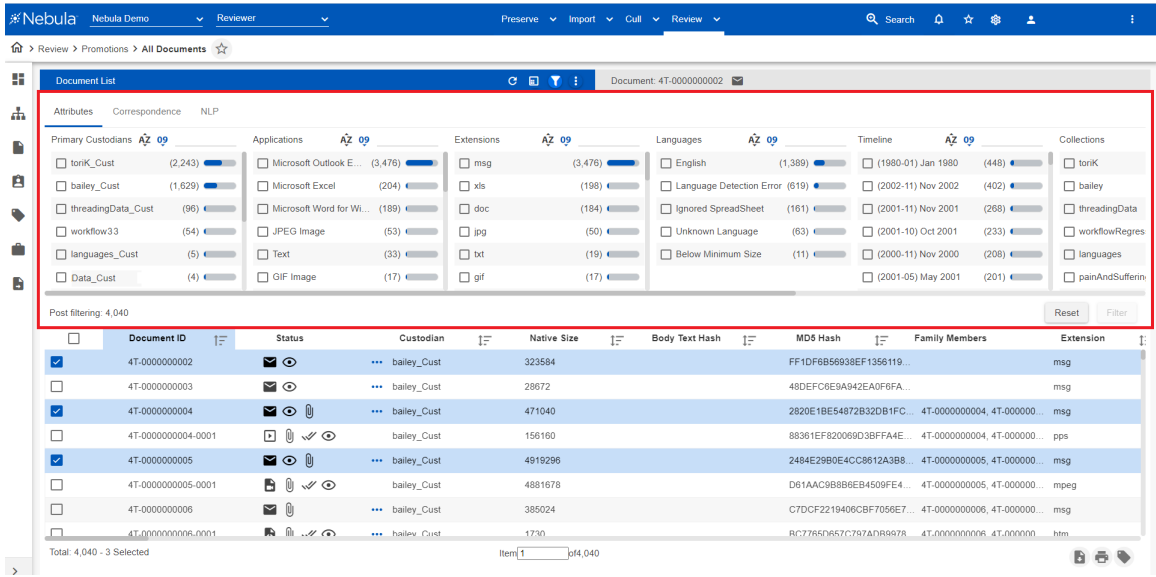
The Document List displays a configurable set of metadata and attributes of documents in a search result or a folder on the Reviewer dashboard. From here, users can:

- Open the Document Viewer.
- Perform many common database functions "en masse."



1. Document List menu:

-  **Refresh:** Updates the contents of the displayed Document List.
-  **Show/Hide Facet Explorer:** Displays current attributes of the document set.



Note: The Show/Hide Facet Explorer icon is only available for DIRECT searches.

- ⋮ **Actions:** Performs mass actions on the Document List, including exporting metadata and running various reports.

2. **Document List:** Displays select metadata fields for each record on the list.

Note: By default, the Document List is sorted by Document ID.

3. **Document Totals:** Displays the total number of documents in the Document List, as well as the number of the document currently selected.

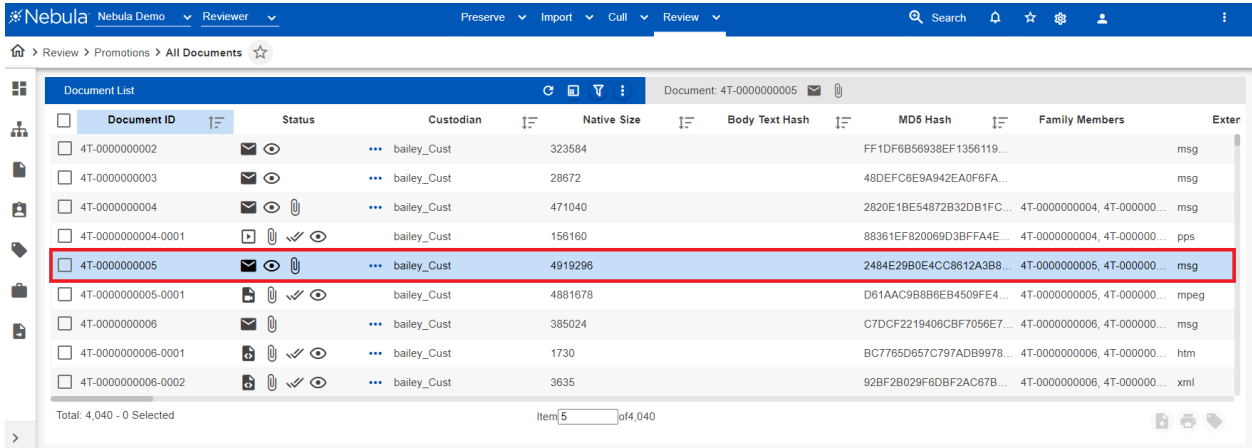
4. **Command Buttons:** Enable you to perform the following tasks to documents selected on the Document List:

- ⬇ **Download natives:** Prepares a zip file of the files selected in the Document List.
- 🖨 **Print selected documents:** Converts documents to PDF for direct printing or saving.
- 🏷 **Mass Tag (Associate/Unassociate attributes with selected documents)**

To open a document in the Document List in the Document Viewer

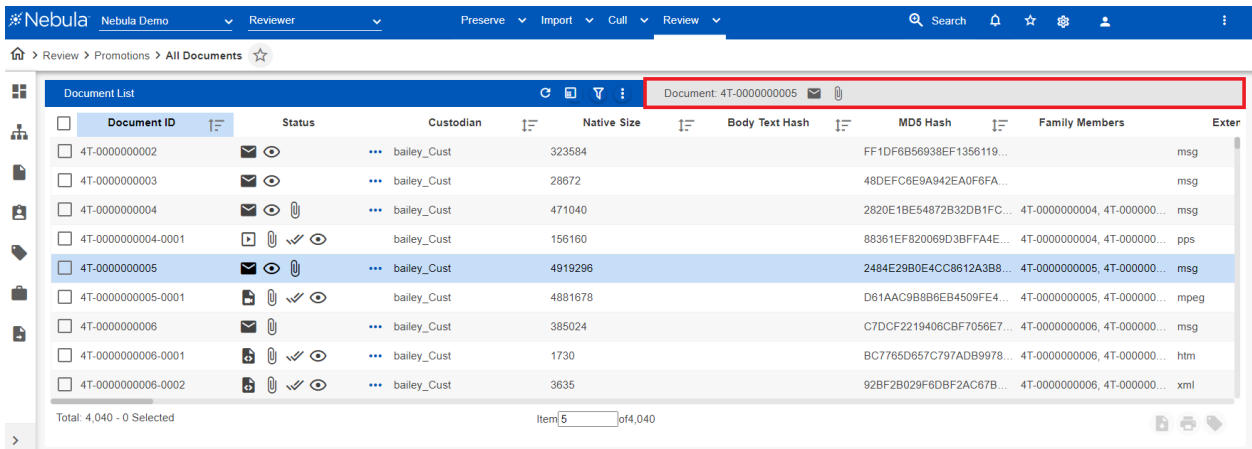
Method One

- Locate the document in the Document List and double-click its row.



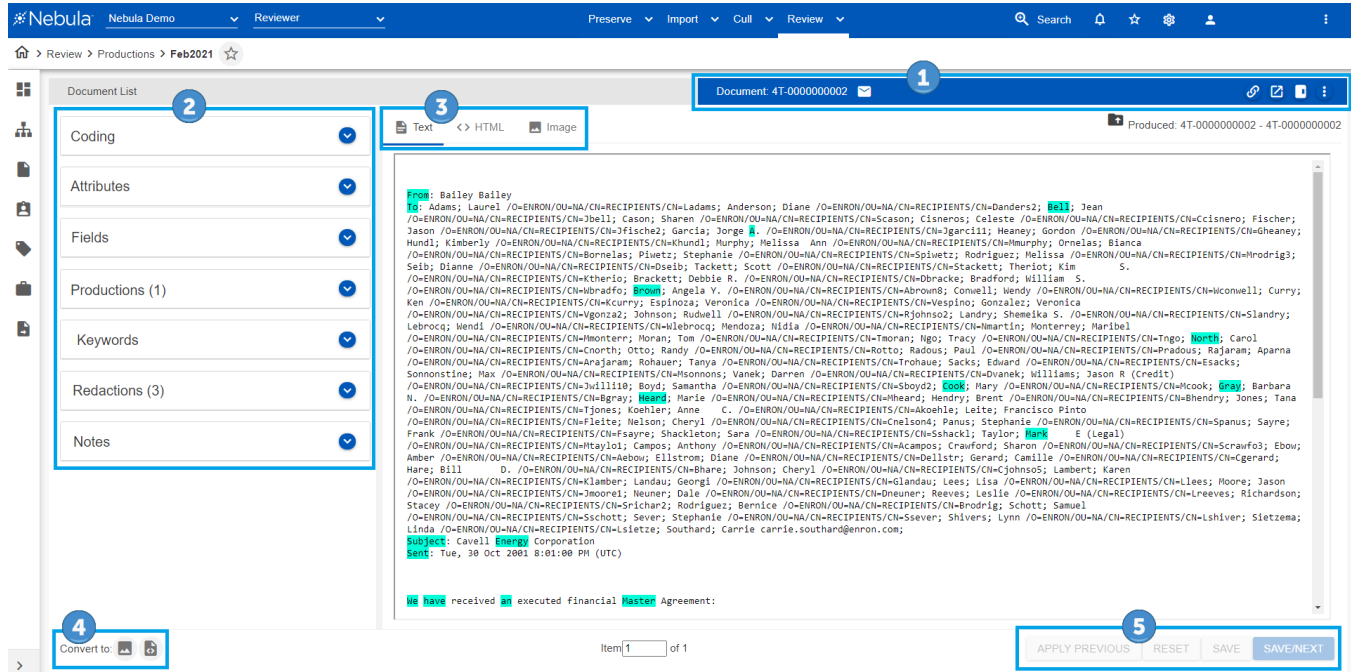
Method Two

- Locate and select the document in Document List, then click the **Document Id** in the menu bar.



Document Viewer

The Document Viewer displays different views of the document selected from the Document List and enables you to review and annotate documents.



1. **Menu bar:** View Document ID and document type on display and navigate the Review Document List.


Icon	Description
	Copy document URL: Copies the document URL to clipboard, enabling you to create a link to the document in an external browser (whose IP address can than be shared, emailed, ...)
	Undock embedded viewer: Open the Nebula viewer in a new web browser tab.
	Dock embedded viewer: Return the Nebula viewer to the Nebula web browser tab.
	Toggle Coding Panel Location: Move the Coding pane to the left or right margin of the Document Viewer.
	Action: Perform key functions such as download, print, and view the document's history.

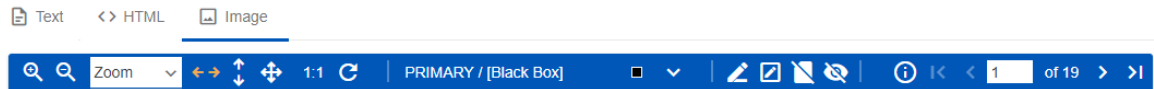
2. **Coding pane:** Choose Coding profiles (tags for specific reviewing tasks), apply Attributes, view Related documents, Metadata fields, and Keywords, and enter Notes.

3. **Viewing tabs:** Choose to view document as:

- Text** : View extracted text or OCR from the document.
- HTML** : View a Native rendering of the document.


-  **Image** : View a TIFF image of document.

Note: *Image provides access to the Image menu bar and the ability to redact and highlight text. (If no image is displayed, click **Convert to Image**  .)*



-  **NSR** : View and redact a Native rendering of Microsoft Excel files.

Note: *Only available for Excel file documents and only after spreadsheets have been parsed.*

-  **Media** : Listen to, redact, and annotate audio files, as well as view video files.

Note: *Only available for multimedia file documents.*

4. **Conversion buttons:** Convert document to Image or HTML.

5. **Command buttons:** Click one of the following coding options:

- **APPLY PREVIOUS** to apply the coding selection of the most recently saved document.
- **RESET** to undo any coding changes you have made without saving.
- **SAVE** to submit your coding selection and remain at the current document.
- **SAVE/NEXT** to save your coding selection and load the next document on the Document Viewer.

Coding a Document

Use the Coding pane's customizable Coding section to record coding decisions about a document.

Coding


Profile
1L Review




Apply to
Duplicates Family Threads


Responsiveness (required)
 Needs Further Review
 Not Responsive
 Responsive

Privilege
 Not Privileged
 Privileged





To code a document

1. Open a document in the Document Viewer.
2. Depending on the type of document, select the view you prefer: **Text**, **HTML**, **Images**, **NSR**, or **Media**. (If no image is displayed, click **Convert to Image** .)
3. In the **Coding** section, select the **Profile** for the coding.
4. (Optional) Select to automatically propagate your coding decisions to any of the following relational items (as displayed in the Related section of the Coding pane. The Related section displays documents related to the current document.):
 - **Duplicates**: Apply coding decisions to all duplicate documents.
 - **Family**: Apply coding decisions to all family members.
 - **Threads**: Apply coding decisions all documents in the thread.
5. Select the remaining options and check boxes reflecting your coding choices.
6. After coding a document, click one of the following:

Click:	To...
 APPLY PREVIOUS	Apply the coding selection of the most recently saved document.
 RESET	Undo any coding changes you have made without saving.
 SAVE	Submit your coding selection and remain at the current document.

Click:	To...
 SAVE/NEXT	Save your coding selection and load the next document on the Document Viewer.

To edit a coding field

1. Open a document in the Document Viewer.
2. Click the **Coding** section drop arrow.
3. Click the **Edit** icon  for the coding field you want to update.
4. Use the Edit Field dialog box to view field settings and make the following changes:
 - **Name:** Edit the name of the coding field.
 - **Privacy:** View the level of privacy - Public, Firm, or User.
 - **Custom Field Format:** View the field format.
 - **(required):** Select to indicate field must be completed.
5. *To delete a tag*, click the **Delete** icon  for the tag you want to delete and on the Delete Confirmation dialog box, click **Ok**.
6. *To update a tag*, click the **Edit** icon  for the tag you want to update.
7. On the Edit Tag dialog box, update the **Name** and click **Save**.
8. *To add a tag*, click the **Add Tags** icon  .
 - On the Add Tags dialog box, type the **Name** and click **Save**.
9. Select the remaining options and check boxes reflecting your coding choices.