

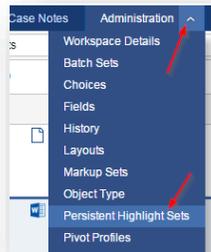
How to: Create a Persistent Highlight set

Persistent Highlights are terms, words, or numbers that can be automatically highlighted when a document is opened. There are 16 colors to define the background and foreground for each term entered. When creating persistent highlights, it's best to avoid the use of these colors, **Yellow** and **Blue** as the two colors are already in use for search term highlights and navigation through all highlights.

NOTE: Terms, to be highlighted should be entered as just words or numbers. Quotes or search operators will be taken literally as part of the word intended for highlighting. The asterisks wildcard can be used however, special care should be taken. Wildcards will pick up connected text as in email addresses and other phrases that are strung together causing long and unwanted highlights.

Creating the highlight set

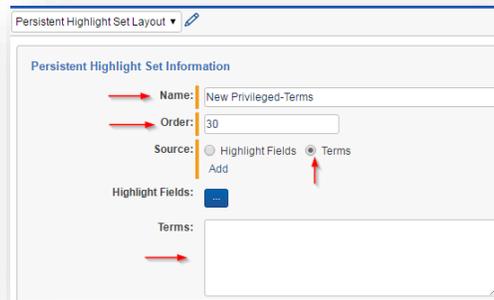
1. Click on **Case Administration** or one of the administration tabs. Find and click **Persistent Highlight Sets** as shown here



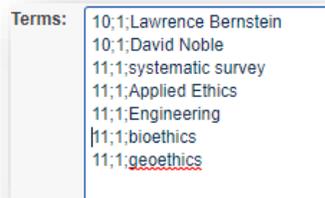
2. Once the new window opens, click **New Persistent Highlight Set** to create a new set. To edit and existing set click **Edit** next to the name of the set.



3. Under Name enter a descriptive name for the set. In this example we've entered **New Privileged-Terms**



4. Next enter the **Sort Order**, this defines where your new set will fall in the list.
5. Next select the radio button **Terms** under **Source**.
6. Next under **Terms** enter the terms and color schemes in the following format **Background; Foreground; Terms**.



In the example above the names entered with **10;1;** as in **10;1;David Phillip** will display the names in a **Red** background with **Black** text, while terms entered using **11;1;** as in **11;1;Engineering** will display the names in a **Green** background with **Black** text.

Color name	Color	Number
[Default]		0
Black		1
Dark red		2
Dark green		3
Dark yellow		4
Dark blue		5
Dark magenta		6
Dark cyan		7
Light gray		8
Gray		9
Red		10
Green		11
Yellow		12
Blue		13
Magenta		14
Cyan		15
White		16

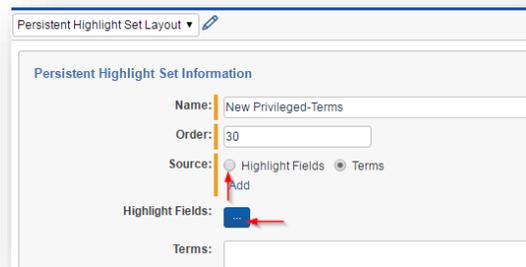
7. Once you have entered the new persistent highlight terms and colors click **Save and Back**

Using Fields

Highlight Fields uses the fields of a Search Term report to provide the terms for highlighting. However, while **Search Term Reports** or **STR's** support *Boolean* operators, *dtSearch* operators and *quotes* for exact phrases. These are not supported in Persistent Highlight Sets. Terms entered in the STR with these operators will not be highlighted in documents.

NOTE: Fields and Terms cannot be combined. Either enter the terms you would like highlighted or select the field containing the terms you would like highlighted.

1. Select the radio button next to **Highlighted Fields**



Persistent Highlight Set Layout

Persistent Highlight Set Information

Name: New Privileged-Terms

Order: 30

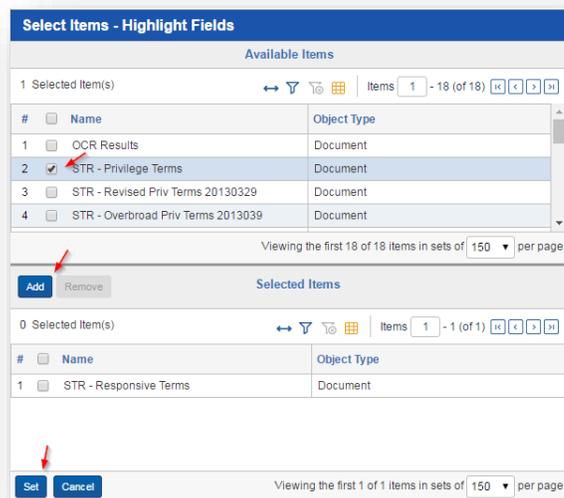
Source: Highlight Fields Terms

Add

Highlight Fields: ...

Terms:

2. Click **ellipsis** button to bring up the popup picker which displays the available list of fields.
3. To select the desired highlight field from the list by checking the field's box and clicking **Add**. This moves the selected item to the **Selected Items** window.
4. Once all the fields are selected click **Set**



Select Items - Highlight Fields

Available Items

1 Selected Item(s) Items 1 - 18 (of 18)

#	Name	Object Type
1	OCR Results	Document
2	<input checked="" type="checkbox"/> STR - Privilege Terms	Document
3	STR - Revised Priv Terms 20130329	Document
4	STR - Overbroad Priv Terms 2013039	Document

Viewing the first 18 of 18 items in sets of 150 per page

Add Remove

Selected Items

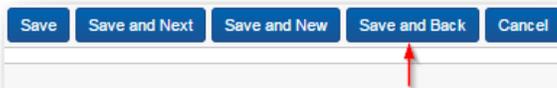
0 Selected Item(s) Items 1 - 1 (of 1)

#	Name	Object Type
1	<input type="checkbox"/> STR - Responsive Terms	Document

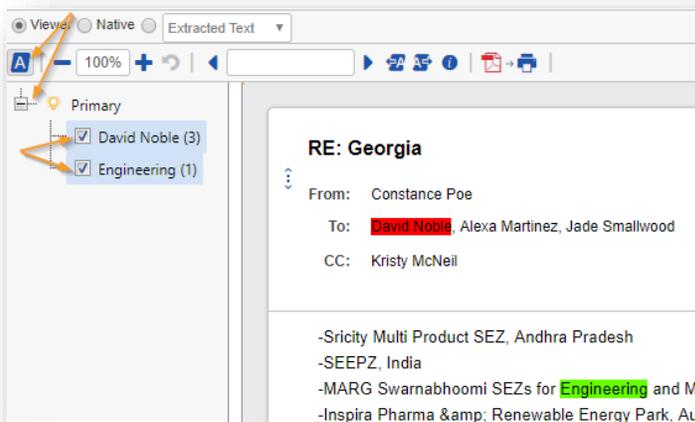
Viewing the first 1 of 1 items in sets of 150 per page

Set Cancel

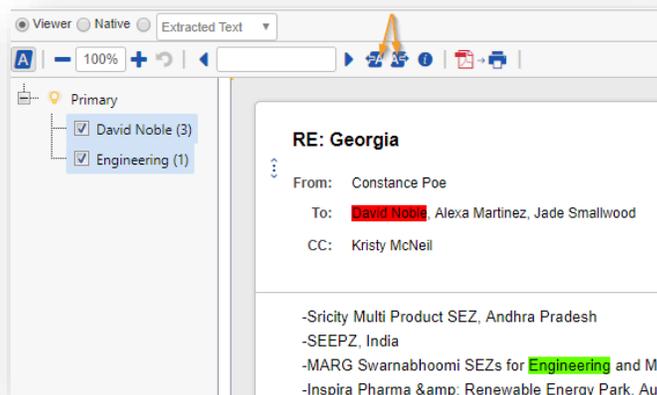
5. Once you have created your highlight set click **Save and Back** to be returned to the list of highlight sets



6. Once a document is opened that contains any of the persistent highlight terms, the terms are displayed in the Viewer and Extracted Text displays of the document as shown below.
7. Clicking the **A** as shown below, displays all the terms found in the currently opened document. Clicking one of the checkmarks turns that term off, while clicking the light bulb turns off all terms for that Persistent Highlight Set



8. Navigation through the Persistent Highlights uses the same icons as navigating through search terms. Clicking either of the icons shown below moves you forwards or backwards through the highlights



We hope this information is helpful. For additional assistance please contact your project manager.