

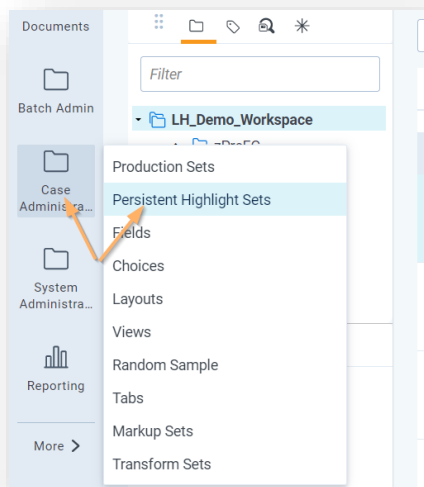
How to: Create a Persistent Highlight set

Persistent Highlights are terms, words, or numbers that can be automatically highlighted when a document is opened. There are 26 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.

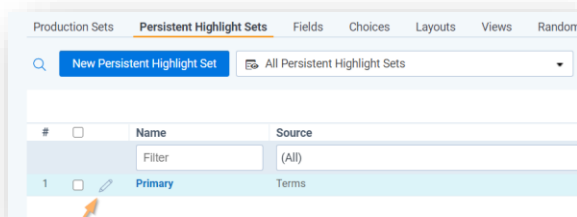
NOTE: Terms should be entered as just words or numbers. Quotes or search operators will be taken literally as part of the word intended for highlighting. The asterisks wildcard can be used however, special care should be taken. Wildcards will pick up connected text as in email addresses and other phrases 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 an existing set click the **PENCIL** icon 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**

Persistent Highlight Set Information

Name*

Order*

Source* Highlight Fields Terms

[Manage](#)

Highlight Fields

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**.

Persistent Highlight Set Information

Name*

Order*

Source* Highlight Fields Terms

[Manage](#)

Highlight Fields

Terms

26;1;UBS
energy
OASIS
11;1;EAS
10;1;NEPCO
24;1;Richard
23;1;Leibert
Measurement
26;1;Method*

In the example above the names entered with **10;1**; as in **10;1;NEPCO** will display the names in a **Red** background with **Black** text, while terms entered using **11;1**; as in **11;1;EAS** will display the names in a **Green** background with **Black** text. **23;1;Richard** will display the name in **Purple** background with **Black** text.

Color name	Highlight 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
Light green		17
Light blue		18
Light yellow		19
Light purple		20
Light red		21
Light orange		22
Purple		23
Orange		24
Dark purple		25
Dark orange		26

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 highlighting in an open document. **Search Term Reports** or **STR's** support *Boolean* operators, *dtSearch* operators and *quotes* for exact phrases. Terms entered when creating a STR can have colors defined when adding the terms. Terms will be highlighted in an open document. Refer to the how to create a Search Term Report for assistance with enter terms.

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

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

Persistent Highlight Set Information

Name* Fields Test

Order* 99

Source* Highlight Fields Terms
[Manage](#)

Highlight Fields STR - REF-112020

Terms

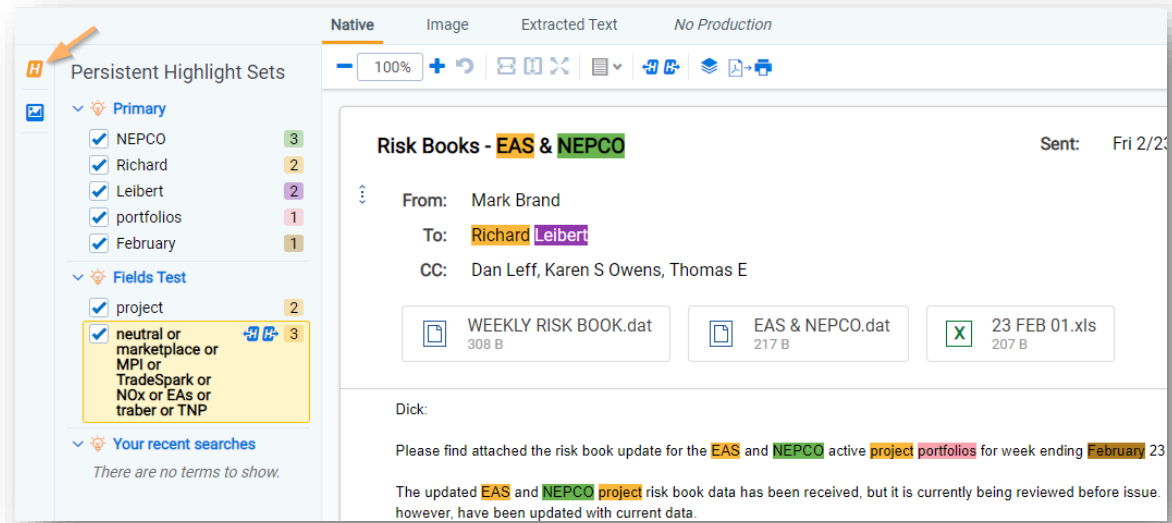
2. Click **Select** to bring up the popup picker which displays the available list of fields.
3. To select the desired highlight field(s) from the list. Enter STR as shown below and hit enter. Select the STR field(s) you want to use by checking the field's check box and clicking the **right pointing arrow** to move the field to the selected fields. This moves the selected item(s) to the **Selected** Items window.
4. Once all the fields are selected click **Apply**

Select Items - Highlight Fields

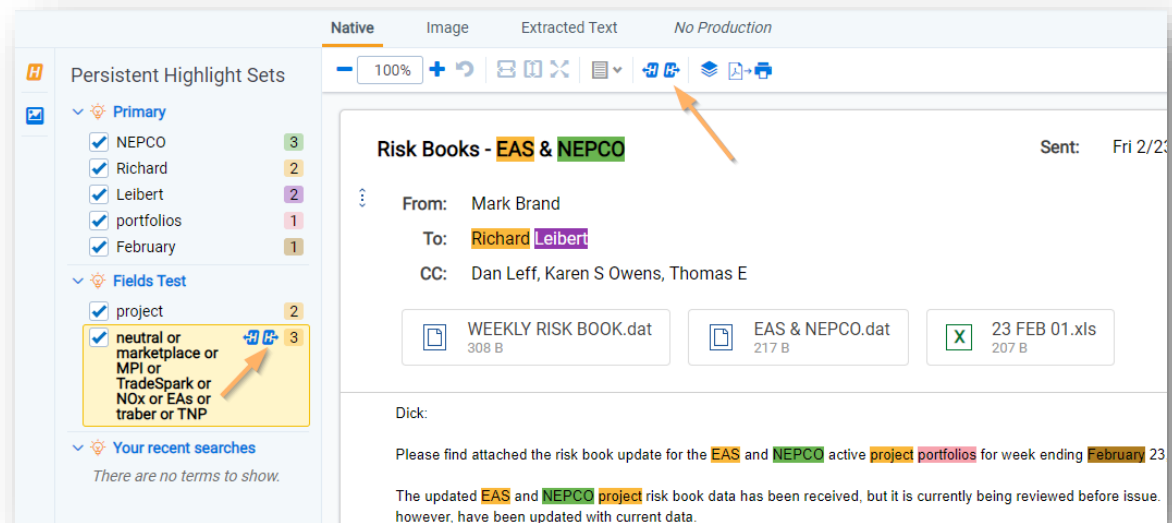
#	Name	Object Type
1	STR	(All)
1	<input type="checkbox"/> STR - REF-112020	Document

#	Name	Object Type
Filter		
No data.		

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 sets, the terms are displayed in the Viewer and Extracted Text displays of the document as shown below.
7. Clicking the **H** as shown below, displays all the terms found in the currently opened document. Clicking one of the checkmarks turns that terms highlighting off, while clicking the light bulb turns off all terms for that Persistent Highlight Set.



8. In the example above, notice that both **Persistent Highlight Terms**, shown as **Terms** and **Persistent Highlight Fields** shown as **Fields Test**.
9. Both uses the inline navigation for each term and icons at the top of the screen for 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.