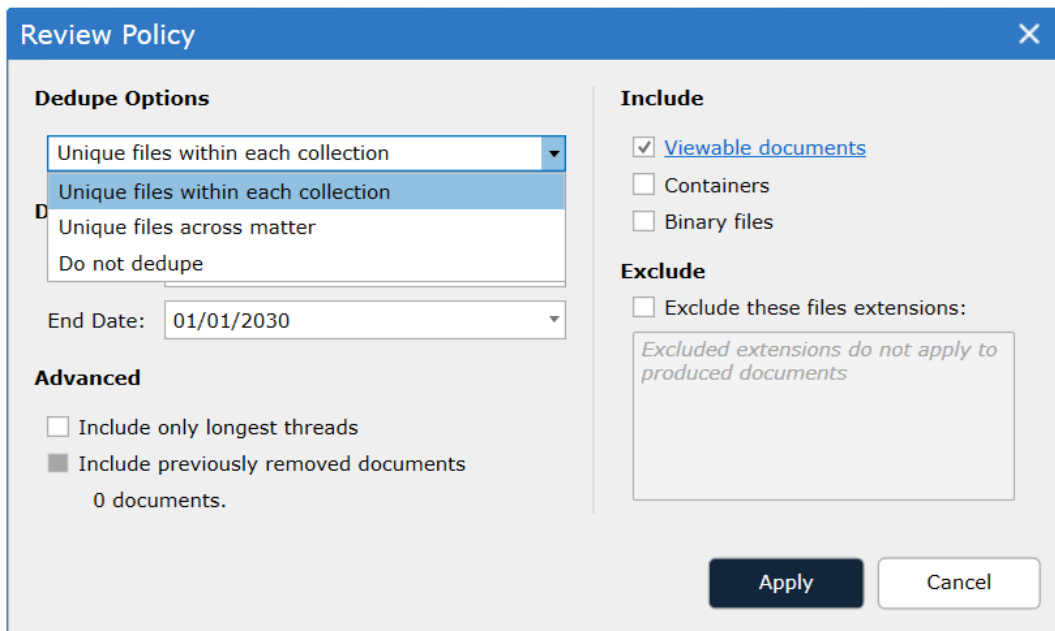


Based on a large amount of user feedback, Policy is now consistent *for an entire matter*. This means *all* of Review will reflect the current settings each time policy is reapplied. The one exception, **anything with a Bates number is never suppressed from review** (even if the documents do not meet the current policy). An additional update has been made to allow for a single import to be passed through (skip policy).

DeDup Options allow review to be set to include only one copy of each document across the entire matter, dedupe the files within each collection or not to dedupe and review all documents.



The screenshot shows a dialog box titled "Review Policy" with a close button (X) in the top right corner. The dialog is divided into several sections:

- Dedupe Options:** A dropdown menu is open, showing four options: "Unique files within each collection" (selected), "Unique files within each collection", "Unique files across matter", and "Do not dedupe". Below the dropdown is an "End Date:" field with a date picker set to "01/01/2030".
- Advanced:** Two checkboxes are present: "Include only longest threads" (unchecked) and "Include previously removed documents" (checked). Below these is the text "0 documents."
- Include:** Two checkboxes are present: "Viewable documents" (checked) and "Containers" (unchecked). Below these is another unchecked checkbox labeled "Binary files".
- Exclude:** A checkbox labeled "Exclude these files extensions:" is unchecked. Below it is a text box containing the text "Excluded extensions do not apply to produced documents".

At the bottom right of the dialog are two buttons: "Apply" and "Cancel".

Advanced

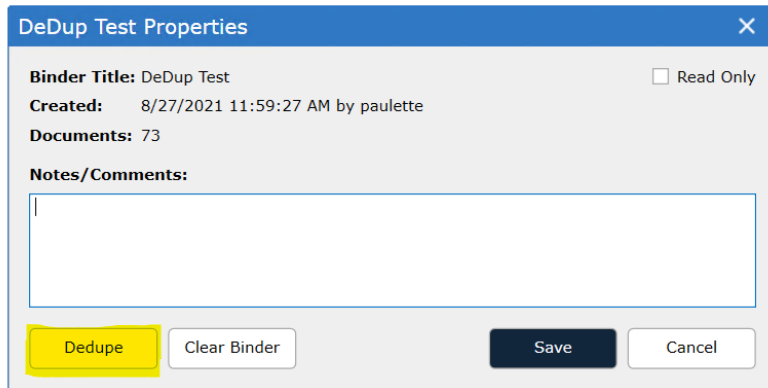
Include only longest threads will remove from review any email for which there are additional forwards/replies. Any intermediate email with an attachment not appearing in the final thread will remain in review.

Include previously removed documents will be used when documents have been removed and need to be placed back into review (to undo any of the options below).

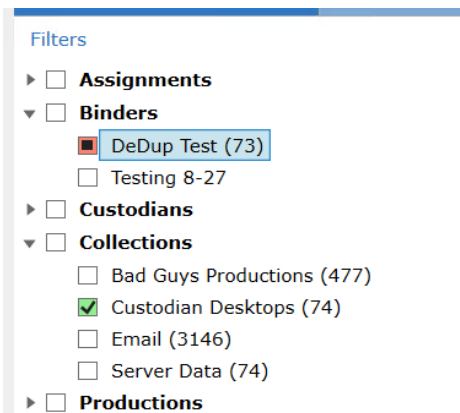
Once the policy is applied modifications can be made using the filter options in Review to achieve specific results per collection/custodian.

To dedup collections or custodians

- In review place the contents of the data set into a binder (multiple collections/custodians to be de-dupped)
- Right click on binder and choose Binder Properties and de-dup



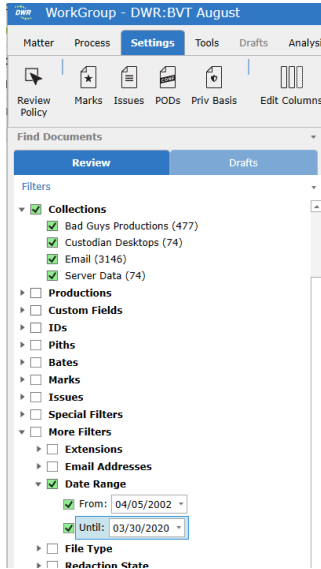
- Select the binder and search "include families" placing the family members back into the binder
- Exclude the contents of the binder and filter on the data set by double clicking on the binder
- The duplicates from that data set will now appear in the filter tree and can be removed from review. Removing From Review



The above screen shot examples where Custodian Desktops and Emails were placed in a DeDup Test binder and then the binder Dedupped. Excluding the binder and including the Custodian Desktops collection will bring into the filter screen all duplicates that were in the Custodian Desktops and also in the Email collection. The resulting filter set is then eligible to be removed from the matter if not needed to review (select all - right click - document properties - remove from review).

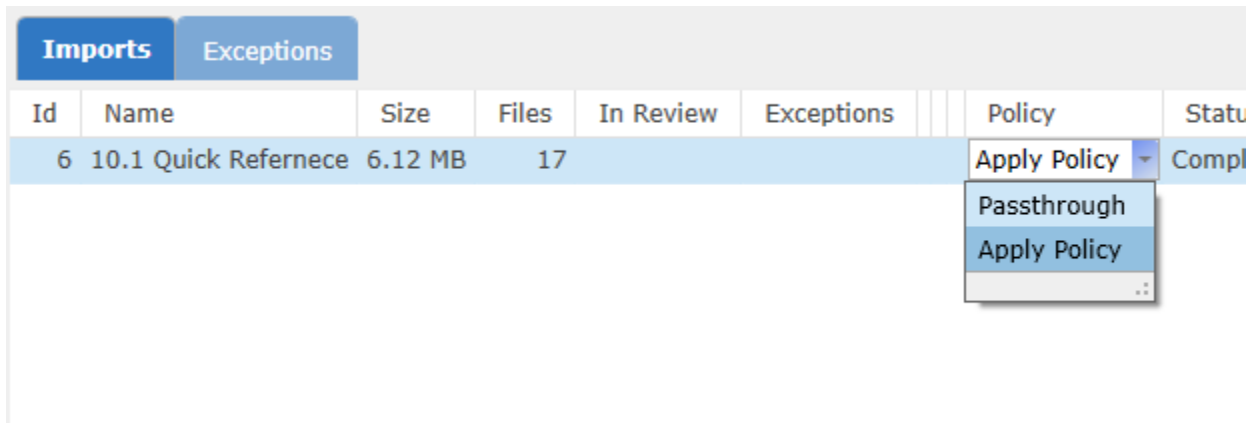
To Modify the Date Range In Review

Select the collection(s)/custodian(s) to which the date filter needs to be applied. Under More Filters is the Date option. Once the Grid Screen displays the documents with the date criteria to be excluded from the matter select all - right click - document properties - remove from review or delete from matter.



To modify a specific import for pass through

When a specific import needs to be placed entirely into review (perhaps for assessment of the contents that are being excluded by policy) go to that import in the Manage Collections window. A drop down for Policy is available on the import level.



Select “passthrough” to pass through to review ALL data in the import. Go to Settings - Review Policy and run the policy to apply the passthrough to this import.



Modifying the Review Policy

In this example all documents within this import were duplicates and the policy was set to de-dup across the matter.

Imports		Exceptions									
Id	Name	Size	Files	In Review				Policy			
6	10.1 Quick Refernece	6.12 MB	17	17				Passthrough ▾			Co

To apply the policy back to the import simply re-select Apply Policy on the Policy drop down and again run the policy from Settings - Review Policy.