



# GETTING STARTED IN NXT v830

## USER

nXT 830 showcases the following features: review batches, e-mail sorting, folder rules, an export to CaseMap shortcut, and concept searching enhancements. These features assist in review workflow by enabling you to quickly review and assign statuses to documents and batches of documents, sort e-mail attachments efficiently, and create focused search queries.

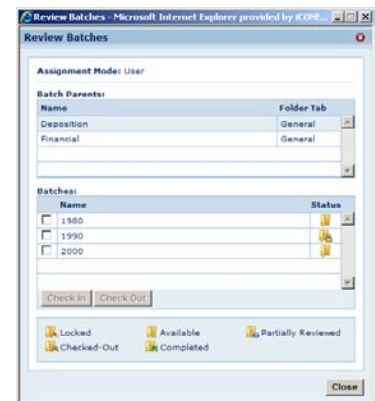
This sheet gives you an overview of using these new features. For more information on these features, and other features implemented in nXT 830, see iCONNECT online help (located along the top of the nXT screen) or contact iCONNECT Support.

## REVIEWING BATCHES

### ① Retrieve or view batches

Depending on how the batches are set up, you will either retrieve or view the batches as follows:

- You will be prompted to click a link to open a batch (see the side image). Once the Review Batches window opens, you click the Batch Parent name, and then check a batch name from the list below, *or*
- The batches will be available in a folder tab (select a folder tab to view). If you are viewing the batch and it has been assigned to you, it is automatically checked out. Batches assigned to you have a caution icon beside it (see the side image).

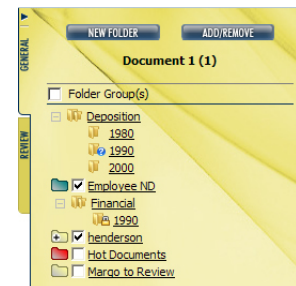


### ② Review documents within the batch

Review the documents that are in the batch. Once you have reviewed some of the documents, the review status appears in the batch folder icon. For other statuses, see the Batch status list along the side.

*Tip: You work with batches as follows:*

- View and review batches in the designated folder tab (in the side image, this is the General tab).
- Check in/check out batches through **Review Batching** on the **Tools** menu.



### ③ Check in the batch

Once you are done reviewing the documents, go to the **Tools** menu and select **Review Batching**.


Click the Batch Parent name if necessary, select the batch you have just reviewed, and then click **Check In**.

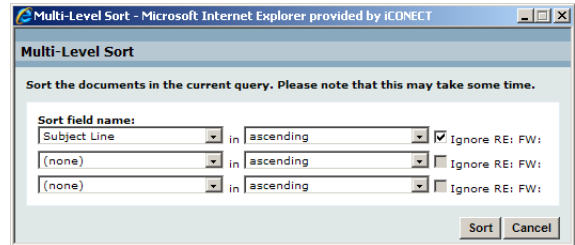
#### Batch status

- Checked out to you
- Locked; assigned to another user
- Available for check out
- Completed; review finished
- Partially reviewed

## SORTING E-MAIL

When viewing documents, you can now sort e-mails and attachments, or the e-mails from a query, and choose to ignore RE: or FW: text in a subject line.

- ① On the nXT toolbar, click **Sort**. 
- ② Select the field name that you want to sort, and check **Ignore RE: FW:**  
*The field you selected is sorted the first character that appears after the RE: or FW:.*

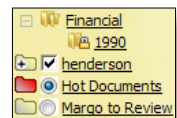


## FOLDER CHANGES

### Folder Appearance

When reviewing documents, you may notice the following different folders within a folder tab:

- **Batches:** the icon beside the batch folder indicates the status of the folder. You can view the documents within the batch if it is available, or assigned to you to review.
- **Radio buttons:** the radio button beside the folder can be clicked to add a document to the folder, or to indicate the review status for the document you are reviewing.

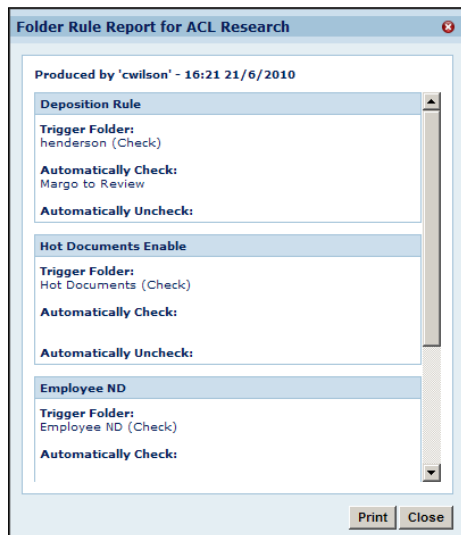


### Folder Rules

You may also notice that when you folder a document, it could also be added to another folder, or that you cannot add a document to the folder. Administrators can set up folder rules to assist in more accurate review.

To view folder rules for a database, from the **Tools** menu, select **Folder Rules**.

The folder rules report opens.



*Folder Rules report*

## EXPORT TO CASEMAP SHORTCUT

If you export to CaseMap frequently, you can now export documents or a current search using a shortcut on the **Tools** menu (if this feature has been enabled by your administrator).

*Tools > Export > Export to CaseMap*

From here you can choose to export a document or the current search. When selected, an export screen opens to enable you to map iCONNECT fields to CaseMap fields.

# CONCEPT SEARCH ENHANCEMENTS (CONTENT ANALYST)

If Concept Search technology is integrated into nXT, you can now find similar concepts based on a selected document, or on folders. This feature and other concept search enhancements are found in the **Advanced Search** screen.

① On the nXT Toolbar, click **Advanced**.



In the Advanced screen, you have the following new Concept Search features:

- Bulk Find Similar
- Conceptual Synonym List

These items are described below.

## Bulk Find Similar

Using the Advanced Search form, you can identify and search for similar document content, or select specific folders that contain the concepts that you want to find. This search criteria can be added onto any other search criteria, or can be run as an individual search query.

The form is titled "Bulk find similar:". It contains two sections. The first section has a dropdown menu set to "AND", a checkbox for "Based on entire document content", a text input field for "Document:", a "Minimum score:" dropdown set to "50", and an "Add" button. The second section has a dropdown menu set to "AND", a checkbox for "Based on folder contents", a "Minimum score:" dropdown set to "50", and an "Add" button.

## Conceptual Synonym List

Just like the Dictionary List, you can use the Conceptual Synonym List to identify similar concepts in the database. (Note that this is not necessarily synonyms, but words that have the strongest correlation to the entered word.) Words within this list can be added to any query that you are building.

**Tip:** Bulk Find Similar and Conceptual Synonym search criteria are added to the Search Builder just like any other search criteria. For more information on using the Search Form, refer to the iCONNECT User's Guide.

## Concept Search highlighting

When a concept search has been run, the number of hits are identified along the top of the screen and highlighted within the text of the document.

**Note:** If you have searched based on folder contents (using the Bulk Find Similar feature), the search results will not be highlighted.

The document viewer shows a toolbar with navigation and action buttons. Below the toolbar, it says "Now viewing document 1 (1) of 1 in Search: Our object...". A summary bar indicates "0 keyword hit in document, 1910 concept hits in document". Below this is a table with fields: BCC, Document Date (01/01/0000), Sent Date (00/00/0000), Received Date (09/05/2006), Document Type (Study), and Full Text. The Full Text field shows a snippet of text with several words highlighted in yellow: "Objective: Our objectives were to describe the preoperative mood levels and psychological readiness levels of patients undergoing primary reconstruction of the anterior cruciate ligament (ACL) and to examine differences between adolescent and adult sports medicine patients relative to psychological readiness for ACL surgery."

## Concept search highlighting