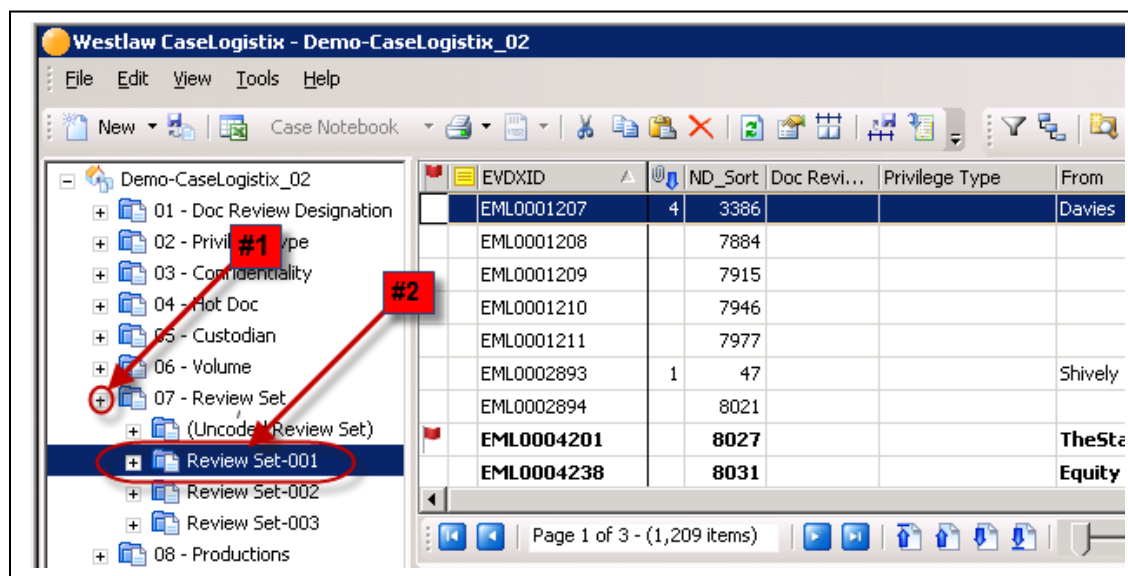


Quick Start Guide to Westlaw CaseLogistix

How to Navigate, Review, Code, Include Families, Search and Tab in a Database

I. **Navigate:** select an Intellifolder to navigate to documents

- Left-click on the “plus” sign by an Intellifolder and select the desired sub-folder (#1).
- The example demonstrates selecting a Review Set folder (#2). This is a common way to assign documents to reviewers.
- Intellifolders organize the documents by custodians, volumes, productions, or other categories.
- Any field can be displayed as an Intellifolder and used to display important information.



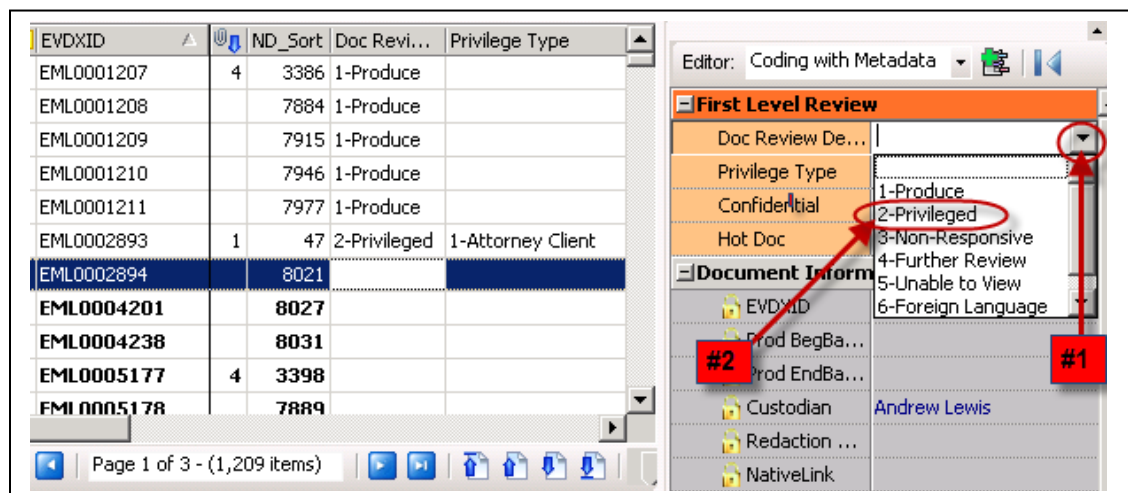
II. **Review:** launch the “Native/Image” tab as a full screen to view the documents

- Left-click on the icon circled in the screenshot to the right (#1) to launch the viewer as a separate window.
- The full screen can be resized (#2) and adjusted to the desired position.
- If dual monitors are available, move the viewer to the second monitor to see both windows.
- Select the “Native/Image” tab (#3) to view the documents.



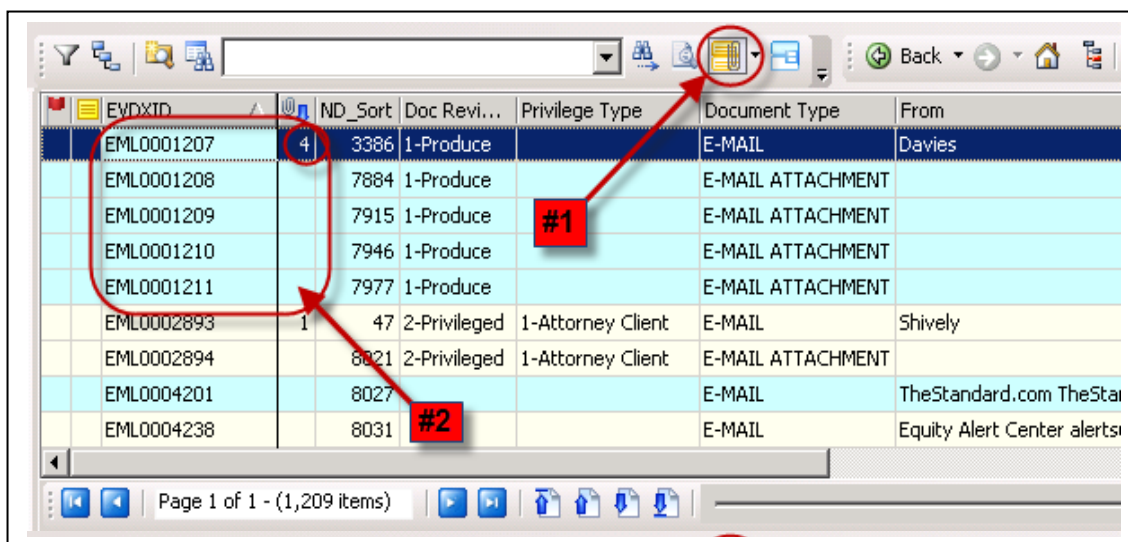
III. **Code:** use the Editor to code the documents

- Left-click on the dropdown arrow in the Editor (#1) and select a code after reviewing the document (#2).
- Alternatively, type the number of your choice to auto-populate the code and “Tab” to move between Editor fields.
- For checkbox editor fields such as Hot Doc, left-click to code this choice with a checkmark.
- Coding is automatically saved.



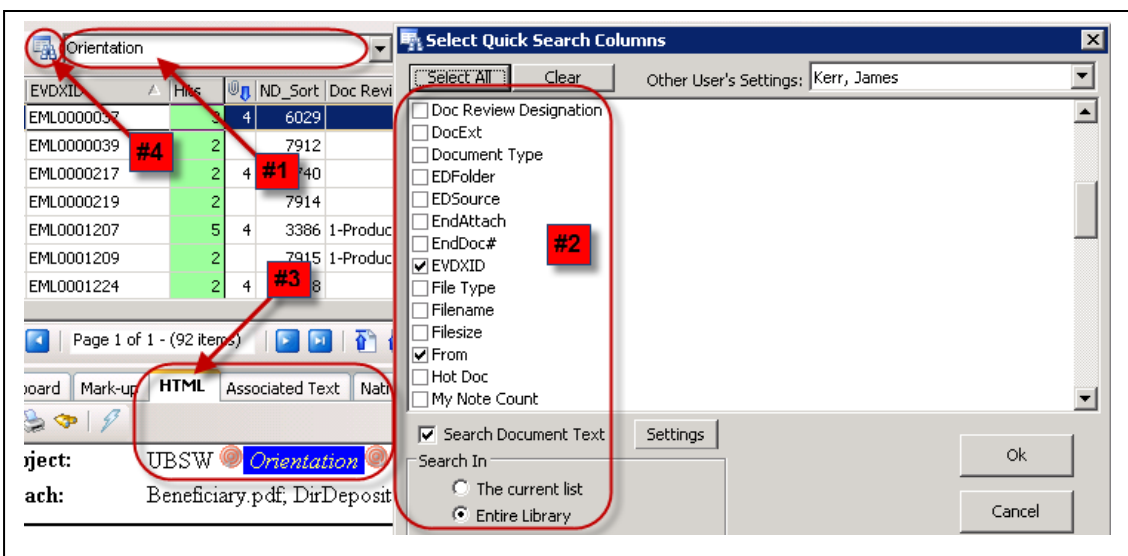
IV. Include Families: view the email/attachment relationships

- Left-click on the "Include Entire Document Families" icon (#1) to toggle on the document family view.
- This view color-codes the document families, alternating between light blue and off-white.
- The example to the right (#2) shows an email with 4 attachments highlighted in light blue.
- To toggle off this view, left-click again on the icon (#1).



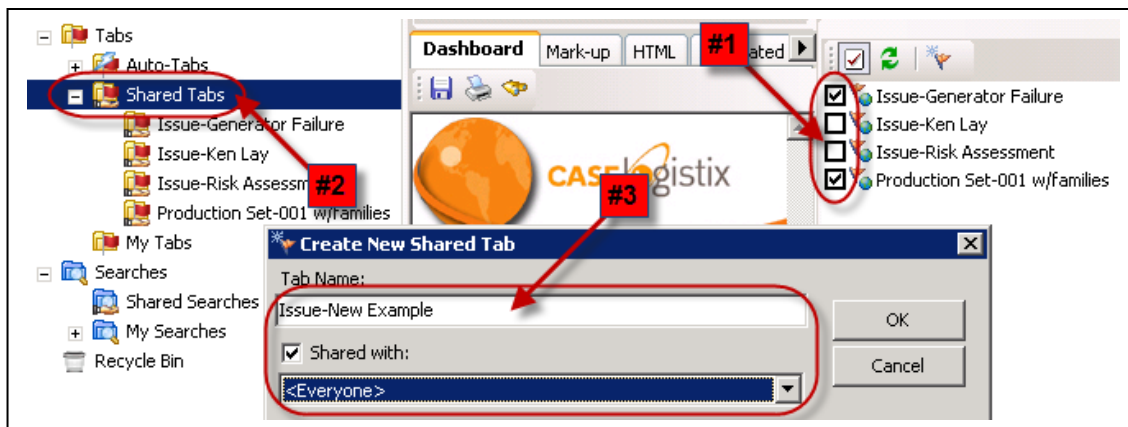
V. Search: use the Quick Search bar to run simple searches for documents

- Type a term into the bar (#1) and hit "Enter". Select "Yes" to the prompt to select fields if this is your first search in a database.
- Apply checks to the desired fields (#2) and "Search Document Text" to search the body of documents. Select "Entire Library" if needed.
- Document text search hits will be highlighted in the HTML tab (#3).
- Select the "Change" icon (#4) to adjust the Quick Search settings.



VI. Tab: mark documents by customized issues or categories

- Left-click in applicable checkboxes to assign a document to existing tabs (#1).
- Create a new tab by right-clicking on "Shared Tabs" (#2) and selecting "New Shared Tab".
- Enter a name and select "Shared with: <Everyone>" to allow others to see the new tab (#3).



For a comprehensive CaseLogistix training or any other assistance, please contact Evidox by email at support@evidox.com or by calling 617-654-9060.