



ImageDepot™ quick-start tutorial

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Introduction

ImageDepot™ is a Trial Solutions online review tool that came to market in 2001. Today, more than 1,000 legal professionals across the country use ImageDepot™ to manage over 40 million pages.

Our clients use ImageDepot™ because:

- it's powerful
- it's easy-to-use
- it's offered as a *service*, so there's no software to buy, maintain or support.

All you need to access ImageDepot™ is a browser (Internet Explorer 6 or higher).

Read through this tutorial for an overview of the tool's general features. See the users manual for thorough instructions on using the tool. [Browse through](#) our web pages of FAQs. And, [contact us](#) if you'd like to schedule a demo of ImageDepot™.

Trial Solutions has a team of experts that has been assisting clients with managing litigation discovery materials for decades. We can help with all electronic discovery tasks, handling paper documents, building databases, producing documents... we've done it all.

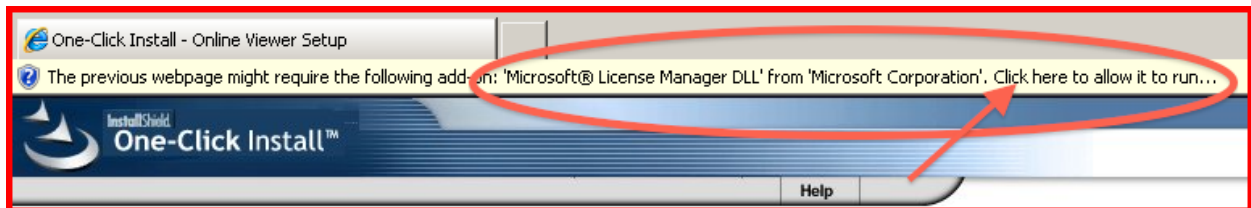
[Contact us](#) today to discuss the numerous ways in which we can help you with managing your litigation discovery collections.

First-Time Access

You do not have to buy, support or maintain any software to use ImageDepot™. You do, however, need a couple of free plug-ins on your computer.

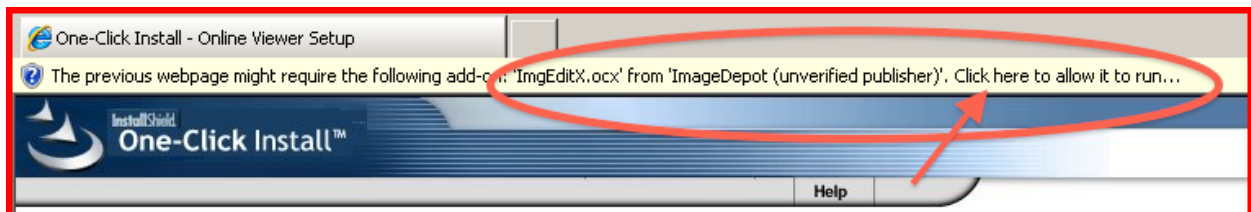
The first time you try to [access ImageDepot™](#), you will be prompted to download these plug-ins if you don't already have them.

The first is **Microsoft® License Manager DLL** from Microsoft Corporation. You'll see this prompt:



Click where directed and follow the on-screen instructions to download and install the plug-in. When prompted to **Run** or **Save**, select **Run**.

The next plug-in is **ImgEditX.ocx** from ImageDepot™. You'll see this prompt:



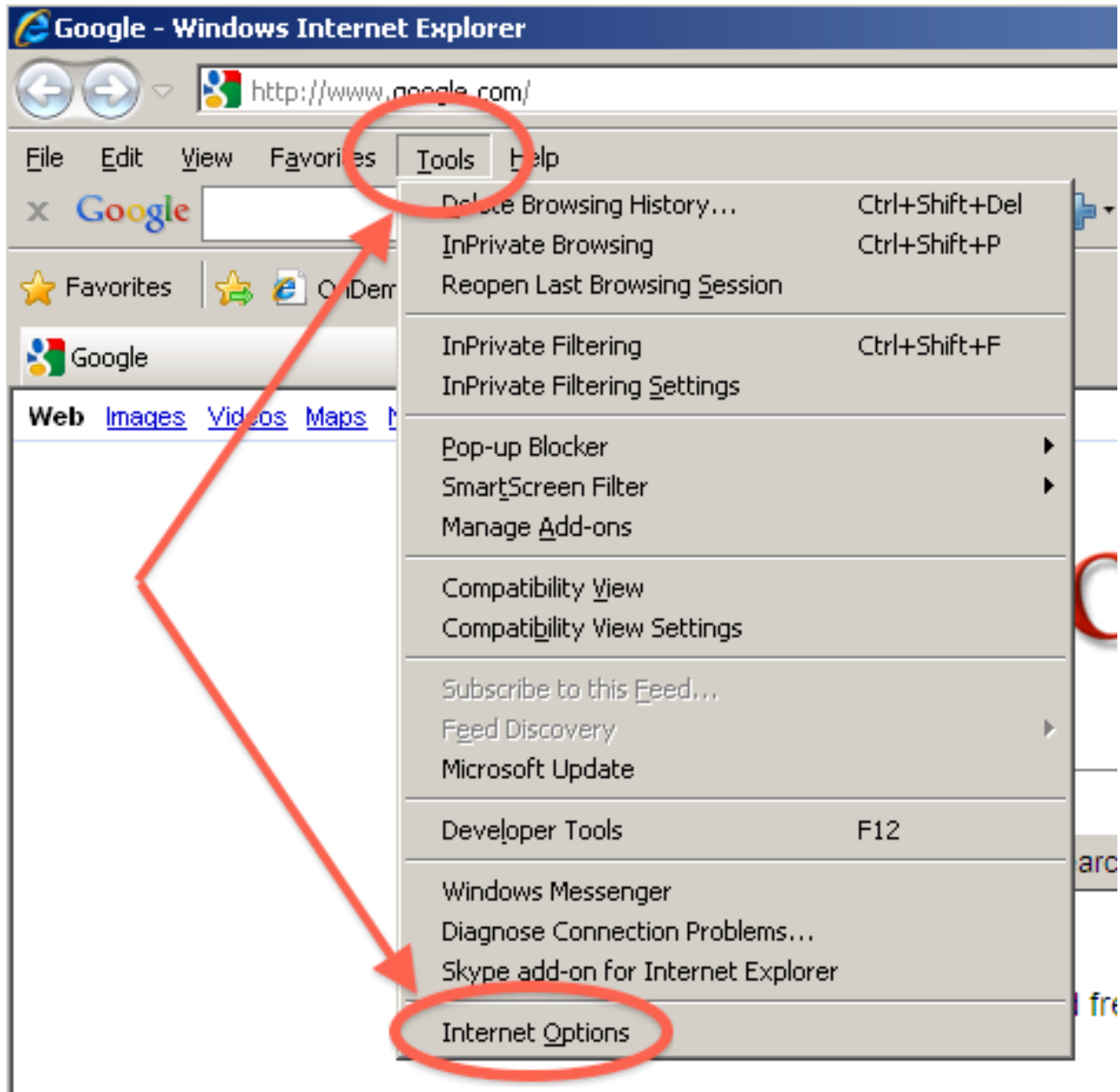
Click where directed and follow the on-screen instructions to download and install the plug-in. When prompted to **Run** or **Save**, select **Run**.

Once these plug-ins are installed on your computer, you'll be able to access ImageDepot™. You will only have to do this once on each computer that you use to access ImageDepot™.

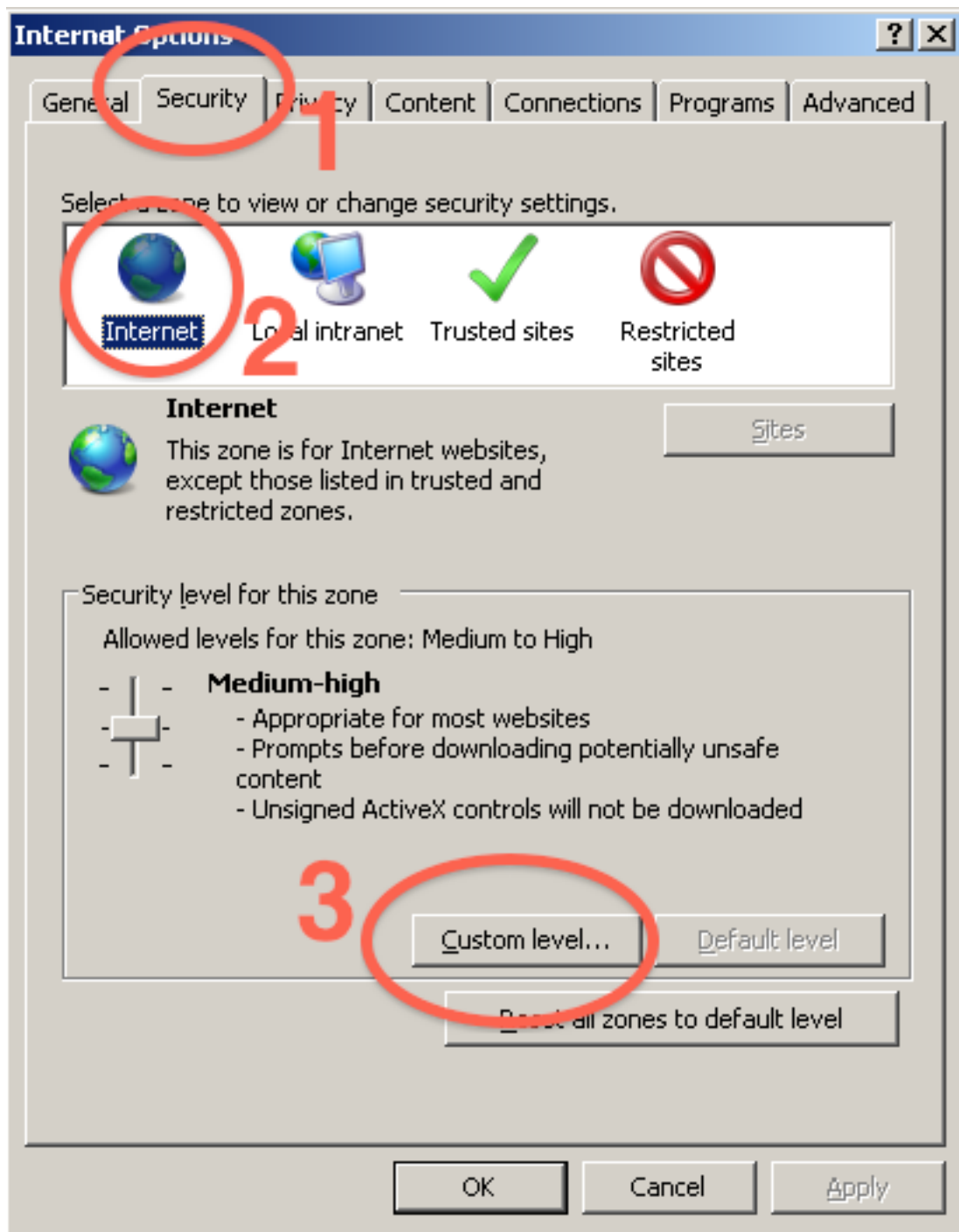
Internet Explorer ActiveX Controls

You may also need to adjust some settings in Internet Explorer to avoid looping issues in ImageDepot™. Follow these steps to confirm that the settings are correct, or adjust them if necessary:

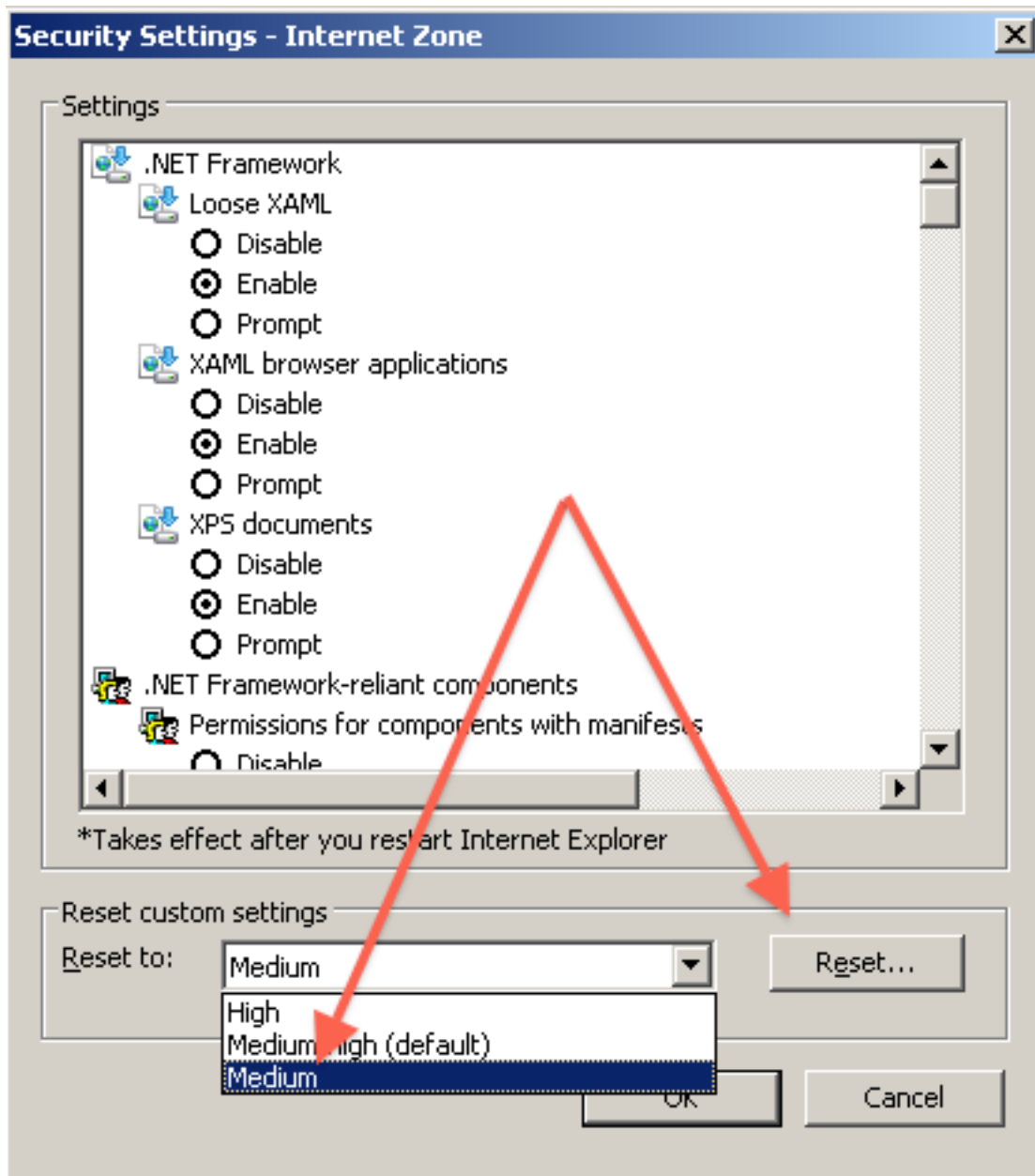
From the Internet Explorer **Tools** menu, select **Internet Options**:



Go to the **Security** tab (1), click the **Internet** icon (2) and click on the **Custom Level** button (3):



Set the security to **Medium** and click the **Reset** button:



Click **OK** to return to the Security tab.

The security bar setting on this screen should have adjusted to **Medium**. Click the **Apply** button.

Logging On

Logging on is simple. Enter the user name and password provided to you by Trial Solutions at the [login page](#):



The logo for ImageDepot, featuring a stylized 'D' with a vertical bar through it, all within a circular frame, set against a blue background.

Members Area

Login:

Password:

If you'd like to look around in the demo database, use this username and password:

Username: ortdemo

Password: demo1

For security purposes, the first time you log in with the username and password provided to you by Trial Solutions, you will be asked to change your password and to select a security question and answer.

The Project Selection Page

When you successfully log in to ImageDepot™, you'll be brought to the project selection page:

Welcome **ImageDepot Demo User**

Tools	Project Name / Description	Powered By: In Version
home logout change password help browse FAQ	Image_Depot_Native_Review number of documents: 65 number of pages: 65 saved searches: <input type="text"/> restore position	last accessed: 12/17/2009 9:21:00 AM last load file: 1/12/2007 3:03:00 PM
	ImageDepot_Tiff_and_Native_Review number of documents: 66 number of pages: 102 saved searches: <input type="text"/> restore position	last accessed: 12/17/2009 9:34:59 AM last load file: 10/24/2008 5:05:00 PM
	Tobacco_Demo number of documents: 99 number of pages: 635 saved searches: <input type="text"/> restore position	last accessed: 12/17/2009 5:20:06 AM last load file: 1/13/2006 4:22:00 PM

It includes two parts:

I. Project Selection Page Tools

There are five tools listed down the left side of the screen. They are:

Home: This is the icon for this project selection (or Home) page.

Logout: Click here to logout of ImageDepot™.

Change password: Click here to go to your account page where you can change your password or change the security question/answer you've selected.

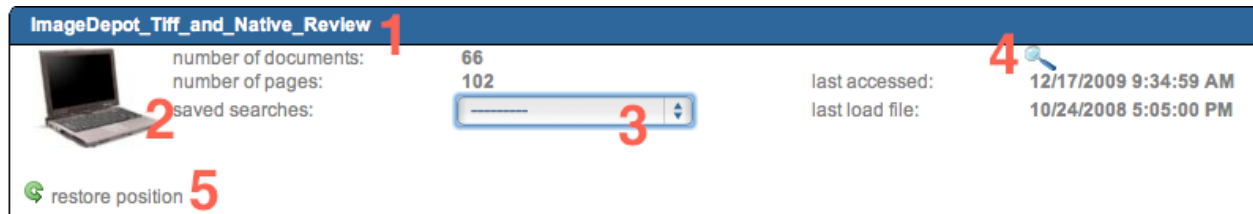
Help: Click here to access live chat help and a user's guide

Browse FAQ: Click here to read frequently asked questions and Trial Solutions answers. There's a lot of information here. It's a good idea and a potential time-saver to look here for help before contacting customer support.

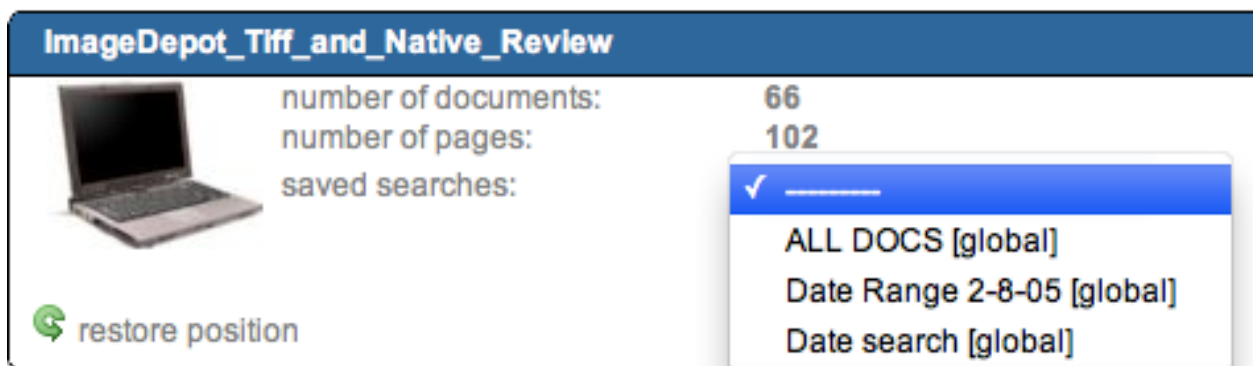
2. The Project List

In this part of the screen you'll see a list of all of the databases to which you have access.

There are a number of ways you can enter a database:



1. Click on the database name.
2. Click on the database icon.
3. Click in the saved searches box and select a saved search from the drop-down list. Here's a list of saved searches from a Trial Solutions demo database:

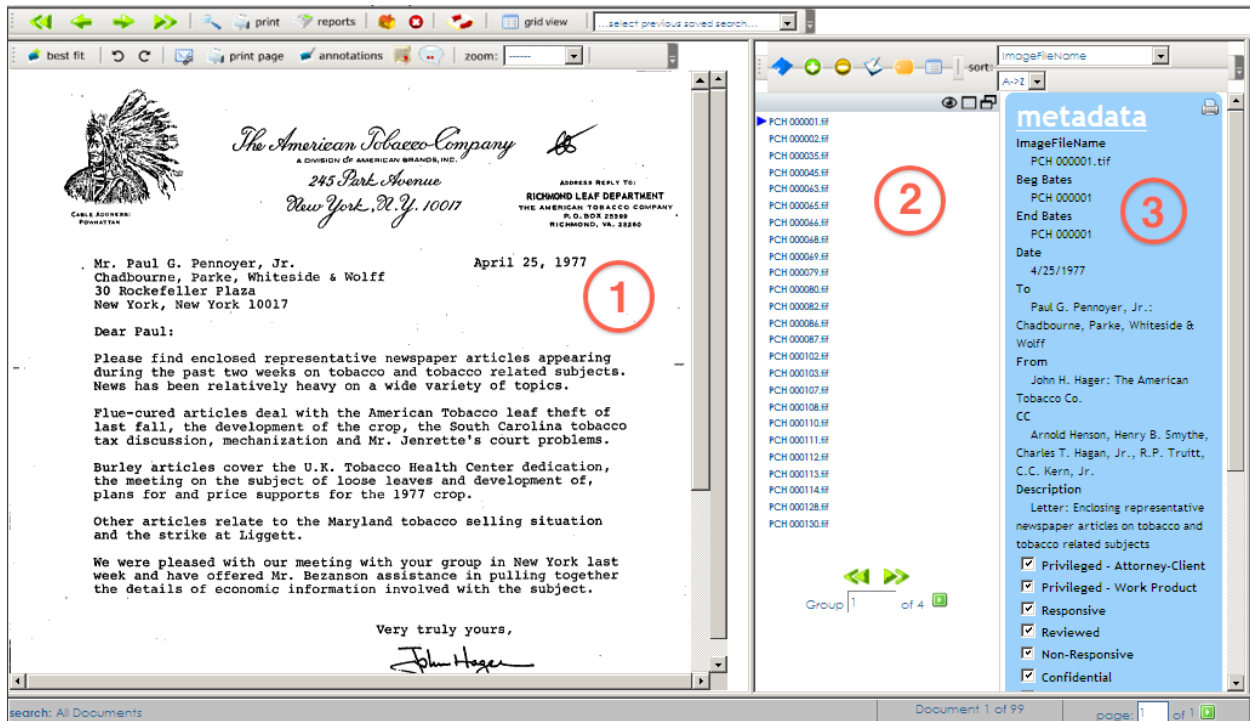


4. Click on the magnifying glass to go to the database's search page.
5. Click on **restore position** to return to the last document you were viewing the last time you were in the database.

The project selection page includes some additional, useful information about each database. You can see the number of documents in a database, the number of pages, the date on which you last accessed a database, and the date on which documents were last loaded into a database. And, if documents were loaded since the last time you logged in, you'll see a temporary link to those new documents.

The Main Page

When you enter a database, you'll be at the project main page where you can view documents and navigate through the collection. Here's a screenshot from our demo database:



There are three parts to the screen:

1. **The Document Viewing frame:** This is the largest part of the screen. It will be populated with the current document -- either the document's image or the document in native form.

The viewer in this panel includes document manipulation and annotation features. For example, you can zoom in on a part of the document that's hard to read, you can rotate the document, and you can apply highlights and notes to the document.

For more information on tools for viewing the document, see the section [Using the Controls](#) in this document or look at the users manual.

2. **The Document List frame:** Here's a list of the documents in the "current collection" -- that is, a list of the documents you are working with now. It may be a list of documents that were retrieved in a search or it may even be a list of all of the documents in the database.

See the section [Document Lists](#) for information on selecting documents on the list and sorting the list.

3. **The Index Information frame:** This panel includes information that was either extracted automatically from the document (for example, an author on an email) or recorded by a coder or review team member while analyzing the document (for example, keywords or a tag that the document is privileged). Usually, you'll find information here like the document date, type, authors, recipients, title, and so on.

See the section [Using the Controls](#) for information on working with the indexed information.

Document Lists

Whenever you work in an ImageDepot™ database, you will be working with a list of documents -- for example, a list of documents that were retrieved in a search or a list of all the documents in a database. The current list -- that is, the list with which you are working -- is in the center panel of the project main page.

There are two features in ImageDepot™ aimed at making review of documents on a list efficient:

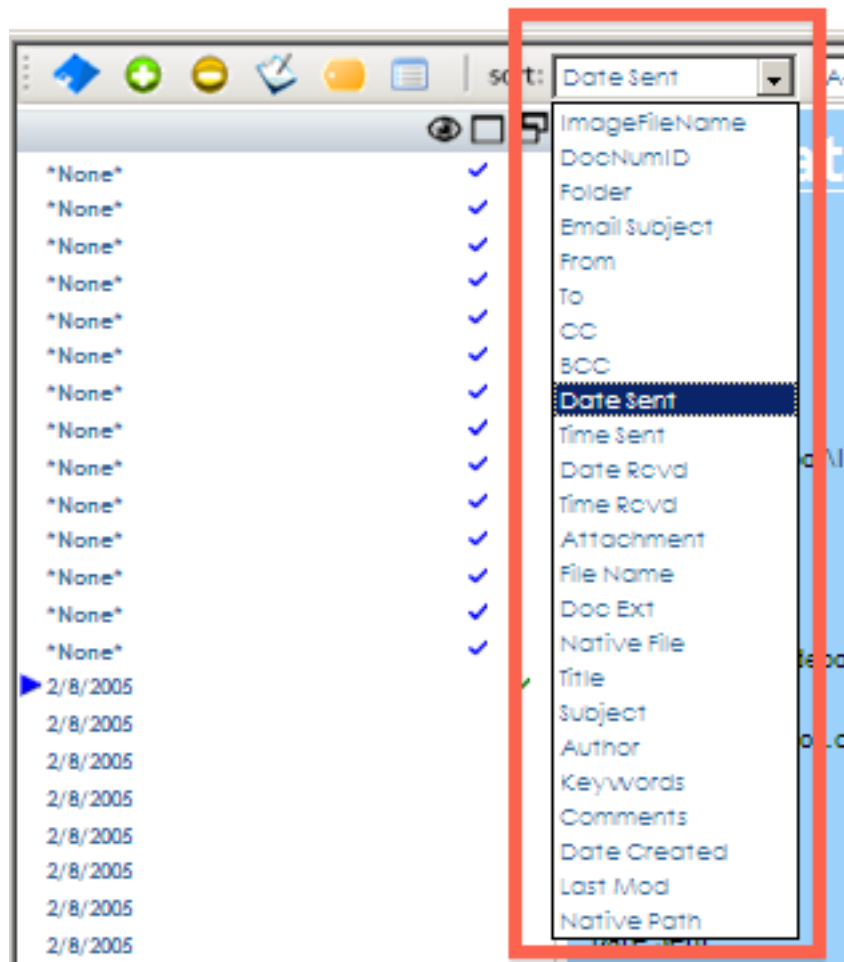
1. **Documents are organized into groups of 25.** This is simply a navigation and ease-of-review aid. If there are 100 documents in a list, the list will be shown to you in 4 groups of 25 each. This minimizes the amount of scrolling you'll need to do to review a lengthy list: -- a list of 25 can easily be seen on a single screen. To move from one group to another, use the double green arrows at the bottom of the list:



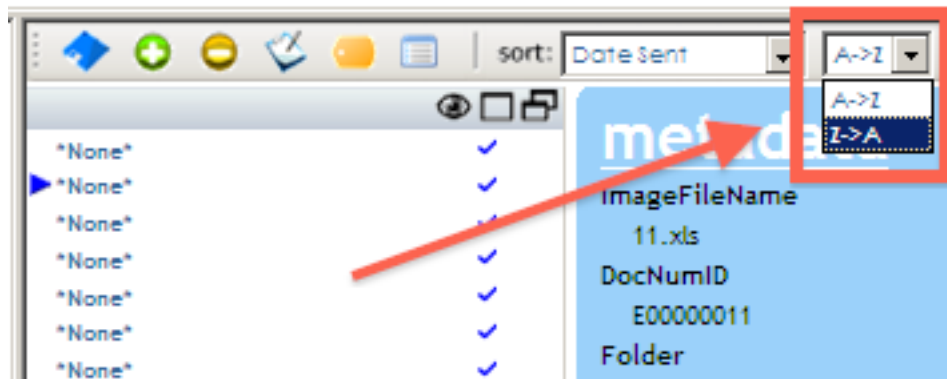
Your system administrator can change the number of documents in a group from 25 to some other number. This setting is adjusted on a user-by-user basis. If it is changed, the change will be in effect in all of the databases to which you have access. If the setting is changed for you, this will not affect any other users.

2. **You can sort a list based on any information that's been recorded for the documents.** Sometimes, for example, you might want to review the documents in document number order. Other times chronological order might be preferable. As long as information has been recorded in the document number and date fields, you can sort the collection on these criteria.

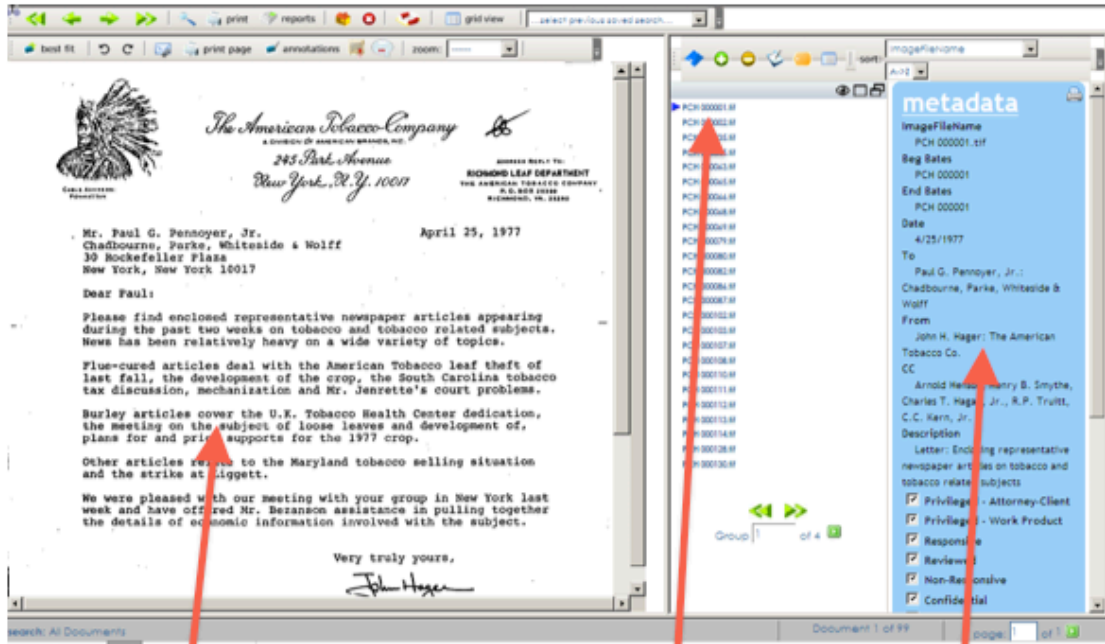
Click in the sort drop-down box and choose the field on which you want to sort from the list that appears:



Once you've selected the field on which the list will be sorted, select whether you want the list in ascending or descending order. Make your selection in the drop-down menu next to the field drop-down menu:



After the list is in the right order, you'll start reviewing documents. Select a document on the list (click on it), and the viewer frame to the left will become populated with that document's image or native form (depending on what you've included in the database). The Indexing frame on the right will become populated with the information that's been recorded for that document in the database.



Document PCH 000001 is selected

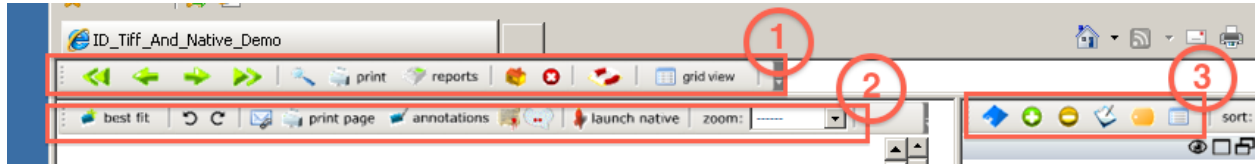
The image for Document PCH 000001

The indexed information for Document PCH 000001

If you want to take a quick look at indexed information for a surrounding document, there's no need to select it. Simply hover your cursor over that document's number on the list and its indexed information will appear in the frame to the right.

Using the Controls

There are three tool bars across the top of the main page:



1. **Working with the database:** The bar on the top includes tools for navigating through and working with the database.

Use the green arrows to page through the documents and the pages of the current document list. There are also tools for searching, printing, generating reports, going back to the project selection page, logging out, accessing help and changing the view of the documents (this tool lets you toggle back and forth between looking at a single document in the document viewing frame or looking at the list of documents and coded information in a table format).

2. **Working with the current document:** The second bar includes tools for working with the current document.

There are tools for sizing the document in the viewer, rotating it, emailing it, printing it, annotating it, viewing the document's history, viewing the document's text, launching it in its native format, and zooming in on areas that may be hard to read.

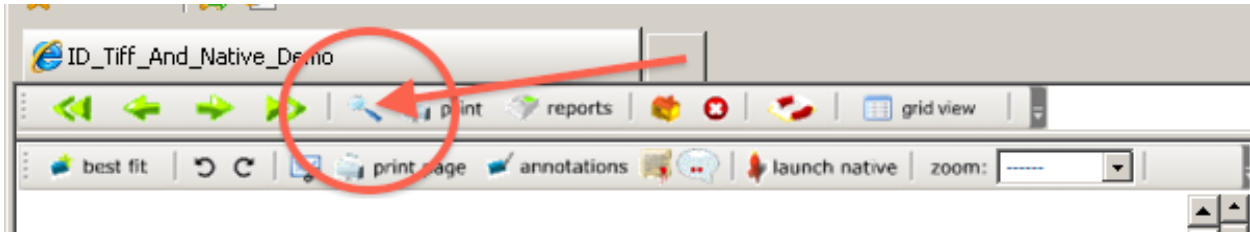
3. **Working with indexing tools:** This bar appears over the document list and includes tools for working with the information that's been recorded for the documents.

It includes tools for downloading an image of the document (which may be easier to code from), creating a new field, deleting a field, putting the indexed information frame into edit mode so you can add or edit information about the documents, tagging groups of documents, and selecting which fields you want to appear in the indexed information frame (and the order in which those fields will appear).

Every icon has 'float over text'. Hover your cursor over an icon to see a brief description of it.

Searching

To do a search, click on the magnifying glass in the tool bar at the top of the screen:



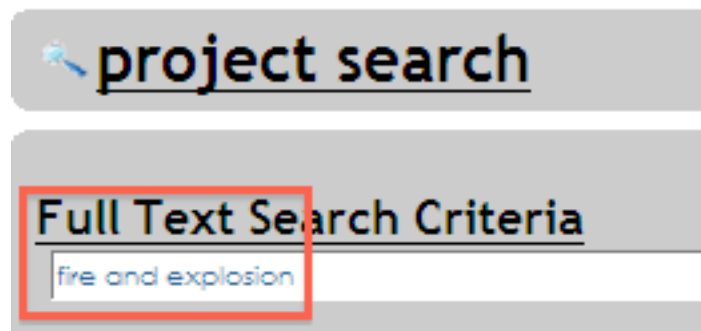
The project search page will open:

A screenshot of the 'project search' page. The page has a header with a magnifying glass icon and the text 'project search'. Below the header, there are two main sections: 'Full Text Search Criteria' and 'Indexed Search Criteria'. The 'Full Text Search Criteria' section is currently empty. The 'Indexed Search Criteria' section contains a table with columns for 'Field Names', 'Comparison', and 'Value'. There are five rows in this table, each with a 'Select a Field' dropdown, a 'Select a Comparison' dropdown, and an empty 'Value' input field. Below the table, there are radio buttons for 'and' and 'or' to specify how the criteria are combined. At the bottom of the page, there are buttons for 'Search', 'Reset', 'View All Records', and 'Home'. There is also a checkbox labeled 'Save this search'.

Searching Full Text

Do simple searches for words in full text by entering a search term in the **Full Text Search Criteria** box at the top of the screen and press the **Search** button at the bottom of the screen.

You can include the operators **and**, **or** and **near** in your search to combine search criteria. For example, if you want documents that include both the terms “fire” and “explosion” in the full text, enter this in the search box:



The documents with hits are retrieved, the pages with hits within those documents are listed, and the hits are highlighted on the pages so they are evident when you review search results.

Searching Indexed Information

Do searches for information that was recorded for the documents in the **Indexed Search Criteria** part of the search screen. Choose a field from the first drop down box, choose a comparison from the second drop down box (for example, “contains” or “greater than”), enter a term in the **Value** box, and press the **Search** button at the bottom of the screen

Use the radio buttons **and**, **or**, and **not** to combine search criteria.

Using the Quick Search List

ImageDepot™ has a “quick search list” feature that makes searching easy and helps to ensure that search results really include what you are looking for.

Rather than enter a search term in the **Value** box, you can select a search term from a list of the actual terms that have been recorded in the field. After selecting the field in which you want to search and the comparison operator you'd like used in the search, click the green down arrow that appears right under the **Value** box:

Indexed Search Criteria

Field Names Comparison Value

Select a Field Select a Comparison [Empty Text Box]

and or 

A pop up box will appear that includes a list of all of the values that have been recorded in the field you selected. Here's an example from the Trial Solutions demo database (the document types field):

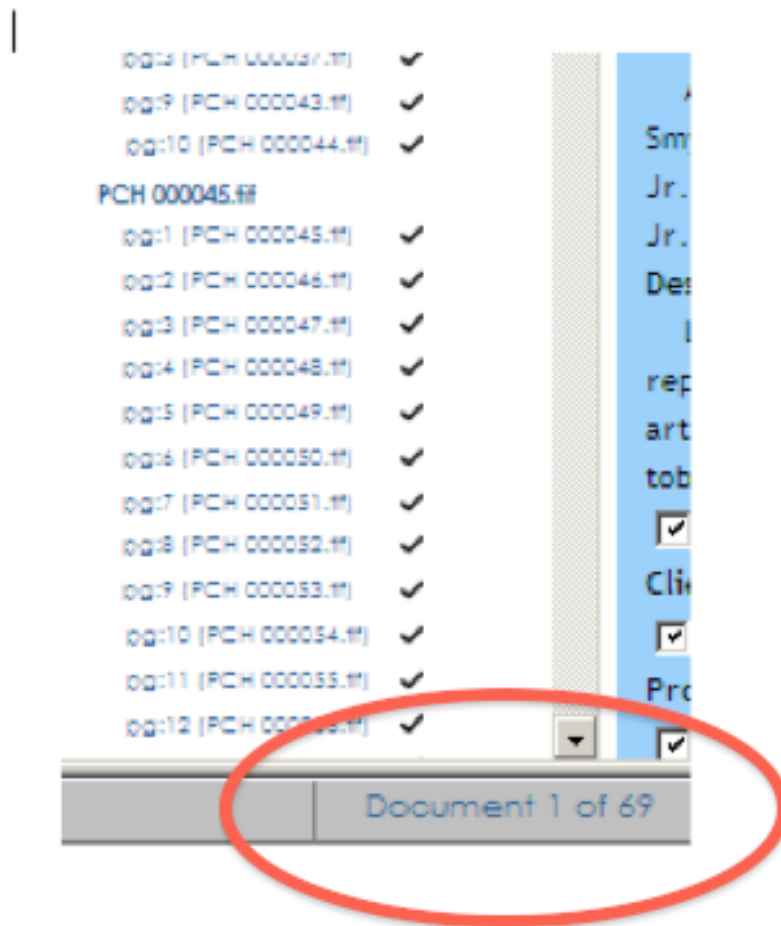
Doc Types	#
[empty]	(32)
Articles/Publications	(1)
Court File	(7)
Court File No	(1)
Deposition	(2)
Draft	(2)
Draft Under review	(1)
Handwritten Notes	(1)
Legal	(2)
Letter	(16)
Memo	(21)
Minutes	(1)
Notes	(2)
Report	(10)

If the list of values exceeds a single screen, use the scroll bar to navigate to the value of interest. Select that value and it will appear in the **Value** box. Then you can continue with your search.

Search Results

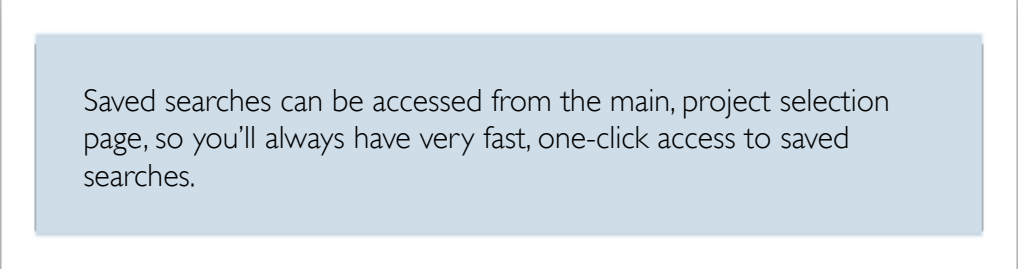
After you execute a search, you'll be brought back to the project main page. The document list in the center frame will now include only the documents retrieved in your search.

At the bottom of the list, you'll see which document is selected and the total number of documents that were retrieved in the search. In this example, the search retrieved 69 documents and the document that is currently selected is the first document.:



Saving Searches

Check the **Save this search** box on the bottom of the screen if you'd like to save the search criteria so it can be used again later.



Saved searches can be accessed from the main, project selection page, so you'll always have very fast, one-click access to saved searches.

Logging Out

It's a good idea to logout of the system when you are finished with a work session. If you don't, the system will terminate the session if it sits idle for the duration that's been entered in the session timeout field in your account. For security purposes, however, it's never a good idea to leave a search session active if you walk away from your computer.

To log out of ImageDepot™ click the logout icon in the tool bar:

