



# BLACKOUT

automated redaction tool

# USER GUIDE

Blackout 5.2

Version 5.2  
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# What's new in Blackout 5.2

- **Note:** Blackout 4.8 and above, will require SQL Server 2016 with compatibility mode set to at least 130.

## Blackout 5.2 Release Overview

### Agent and Configuration Updates

Blackout agent, configuration, and infrastructure have been significantly overhauled to promote greater flexibility and control over how and what your resources are utilized for.

- Standard and High Resource Worker configurations have been removed.
- Project Workers and Viewer Workers have been added.
- Project Workers are responsible for processing all automated project work.
- Viewer Workers are responsible for processing manual Excel, Quality Control, Find & Redact, and Suggestion work.
- Project Worker and Viewer Worker configuration is tied to enabling “Advanced Configuration Mode.”
- If either worker count is set to 0 while the other remains greater than 0, that type of work will be prioritized over the worker who is 0.

Report   Blackout System Log   Blackout Project Status   **Blackout Agent Configuration**

**BLACKOUT** A milyli PRODUCT

Agent Configuration - Advanced

[Save Configurations](#) [Enable Resource Pools](#) [Hangfire Dashboard](#)

Server Name	Enabled	Project Workers	Viewer Workers
K19-R22-PM	<input checked="" type="checkbox"/>	4	4

- New agents default to a 50/50 split between Projects and Viewer activities based on the CPU count of the Agent Server (if it is an odd number, the Viewer will have an additional worker).
- If the worker count exceeds the number of processor cores, a message will be displayed indicating so.
- Resource pool awareness for agents has been retained.

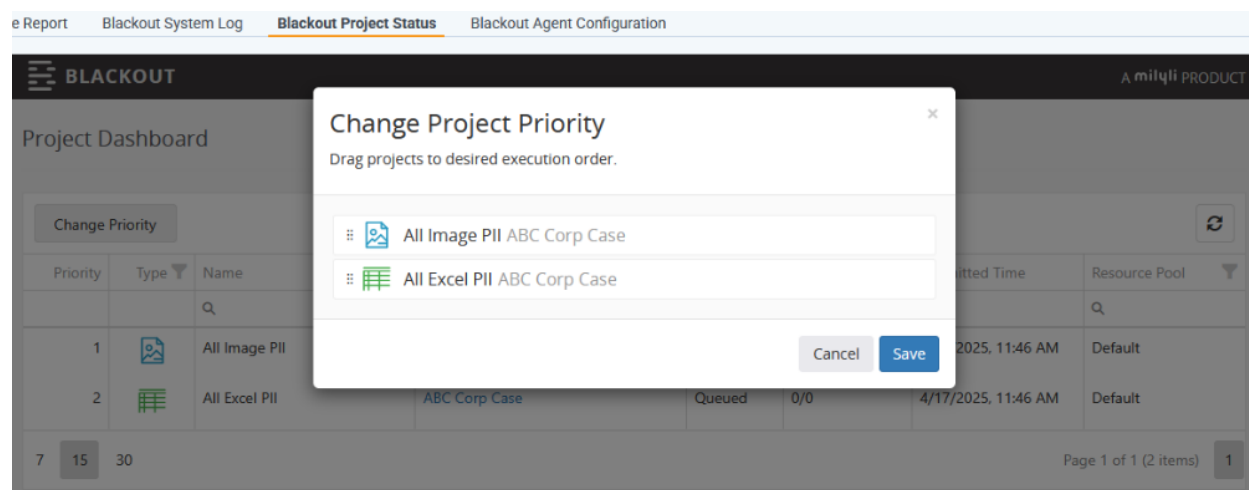
In addition to these changes, we are modifying how manual tasks are prioritized within the Viewer Workers. Viewer Workers will always prioritize tasks that correlate to a reviewer's

immediate actions when working on a document. This will result in tasks being processed in the following order:

1. Tasks processed first:
  - **Find and Redact**, including any required OCR.
  - **Spreadsheet Markup Burn-in**, including:
    - Manual actions
    - Converting markups
    - Mass actions
    - Unhiding Excel content (mass action)
  - **Clear Markup Set**, including the Clear Markup Set mass action.
2. Tasks checked and processed afterward:
  - **OCR Ahead**
  - **Suggestion Searching**
  - **Scheduled Suggestion Tasks** (Reconciliation)
3. Tasks processed last:
  - **Usage and billing-related tasks**
  - **System log pruning**

## On-the-Fly Project Prioritization



We're thrilled to share that you can now easily change the processing order of projects, without interrupting any running projects!



The **Admin Blackout Project Status** page has been updated to show only the projects that are currently running or queued in your Relativity instance. System Admins can simply click the *Change Priority* button at any time to reprioritize projects on the fly!



## Project Dashboard

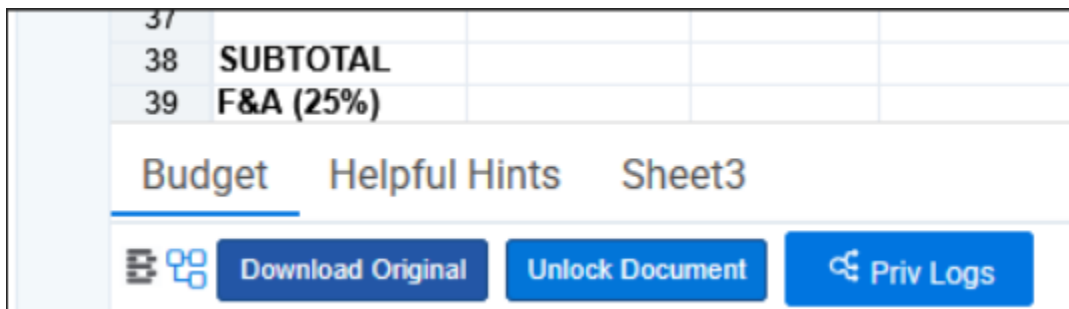
Change Priority <span></span>								
Priority	Type	Name	Workspace	Status	Progress	Submitted Time	Resource Pool	
		Q	Q				Q	
1		All Excel PII	ABC Corp Case	Queued	0/0	4/17/2025, 11:46 AM	Default	
2		All Image PII	ABC Corp Case	Processing	6/818	4/17/2025, 11:46 AM	Default	

7 15 30

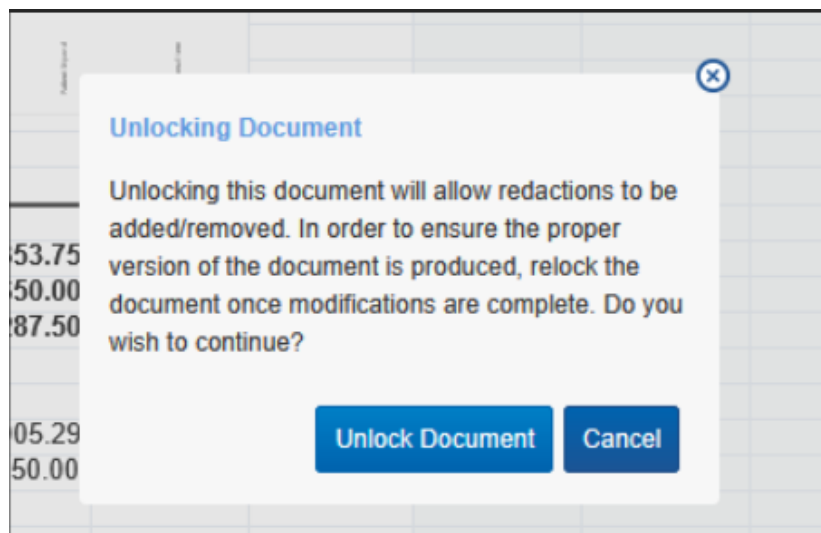
Page 1 of 1 (2 items) 1

## Production Preparation - Unlock Individual Documents

Documents that have been locked as part of a Production Preparation project can now be unlocked and re-locked on the Excel document viewer by users who have been granted permission to do so. You can find the new permission under the Milyli Blackout permissions section named *Lock/Unlock Native Documents*.



Individuals with permission will see a new button on the Excel viewer when viewing a locked document. When clicked, the button will prompt the user with a confirmation warning and then unlock the document.



The unlocked page will display a warning letting the end user know the document is part of a production preparation project and needs to be re-locked to be properly included in production. Upon re-locking the document, the state will be updated, and the redacted extracted text will be regenerated if the project was configured to generate redacted text.

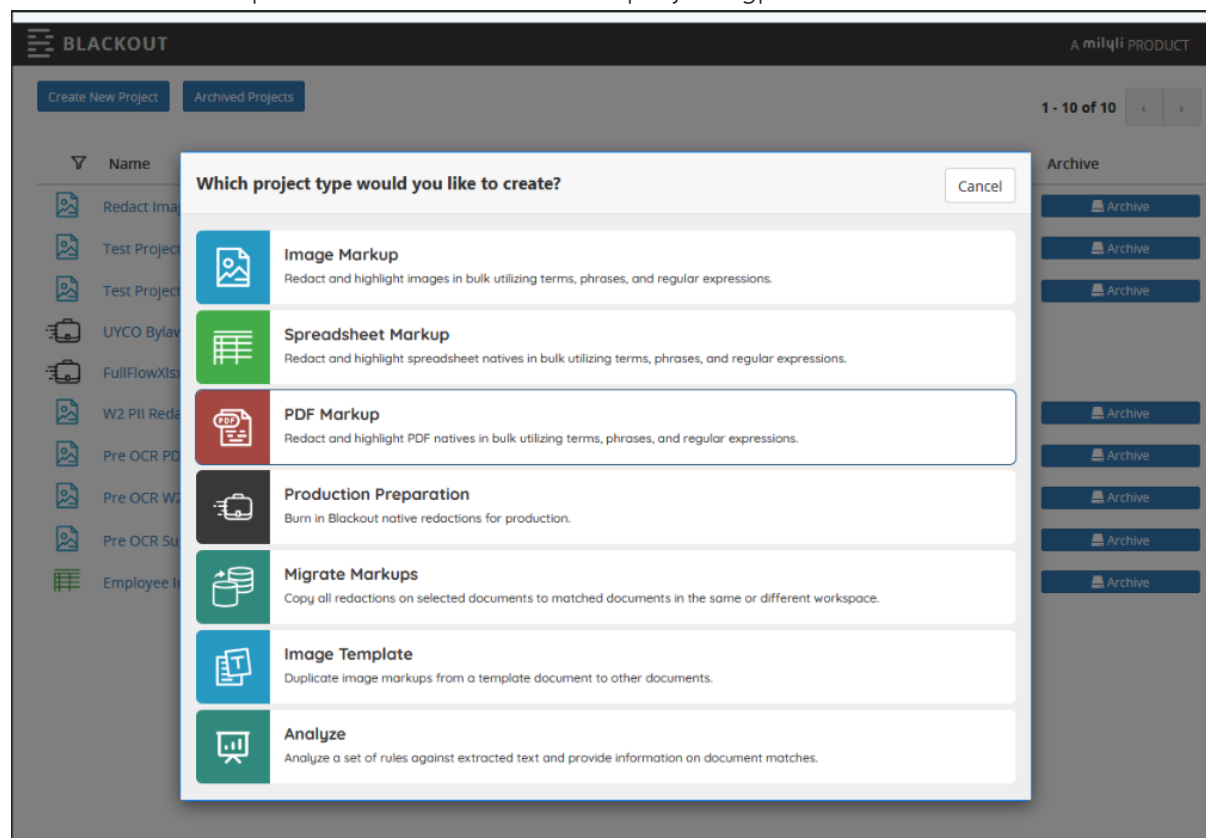
Documents in a production preparation project that are locked to the “None” markup set cannot be individually unlocked or locked. The option to unlock an individual document will not display if the production preparation fails or is stopped partway through.

## Production Preparation – Download Original File

When viewing a locked document, attempting to download the native will always download the redacted version, with no way to quickly access the original. A new button, “Download Original,” has been added, which provides quick access for downloading and viewing the original, unredacted native.

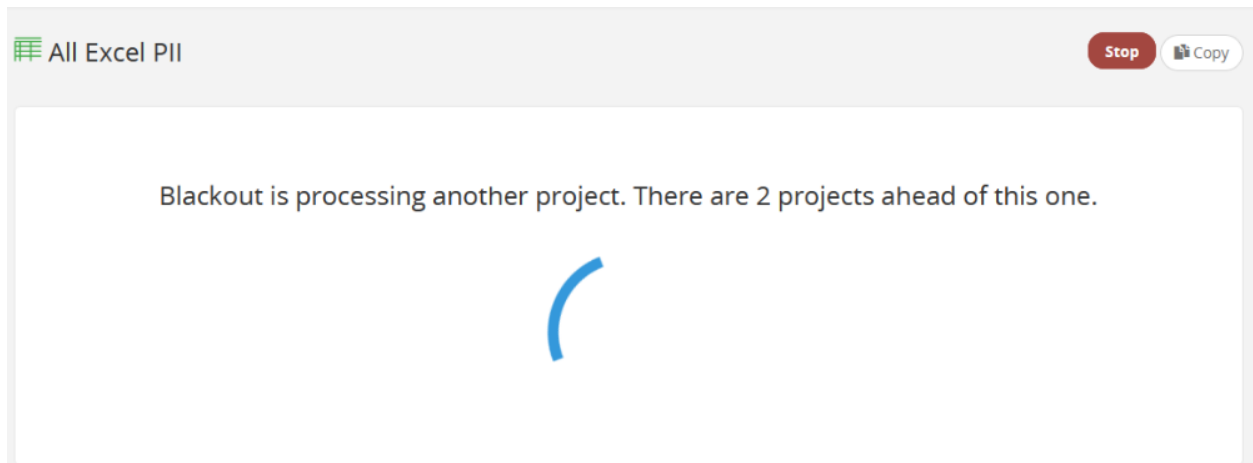
## Create New Project Screen

The Create New Project modal has been updated. Spreadsheet propagation has been removed from the menu. The new modal will more easily scale with different monitor sizes and shrink and expand as we add or remove project types.



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## Improvements to Project Stopping

Projects, especially large ones, can often take a long time to stop. Occasionally, very large image projects fail to stop at all. We've made extensive improvements to the project tasking and queuing system, specifically to address issues with project stopping and significantly reduce the time it takes.

## Simplified Project Run Status Messages

Status messages displayed when a Blackout project begins running have been simplified and clarified to better represent the system's work.

## Has Blackout OCR Field

A new field has been added to indicate if the images for a given document have been OCR'd by Blackout and that the OCR data is stored in the workspace.

## Migrate Project – Destination Saved Search

An optional drop-down has been added to the create migration project form to limit migrated markups to only duplicate documents that appear in the destination saved search.

Create Migration Project

CancelCreate

Visit our [support site](#) for detailed instructions and best practices for migrating redactions.

Project Name:

Details

Source

Workspace:  
ABC Corp Case

Saved Search:

Markup Set:

Document Identifier Field:

➔

Destination

Workspace:

Saved Search (Optional): ⓘ

Markup Set:

Document Identifier Field:

## Changelog

### Bugfixes

- Added protections to recover corrupt suggestion search indexes automatically.
- Fixed grammar and sorting of project type on the Blackout Projects tab.
- Fixed an issue that prevented PDF markups from being migrated if the destination document also had image markups.
- Fixed an issue that prevented external spreadsheet markups from being migrated to an Excel file with no markups if that file was already prepared.
- Fixed an issue that prevented Analyze projects from saving when uploading a CSV with labels exceeding 30 characters.
- Fixed an issue that showed Blackout agent as not licensed on startup, even when it is licensed.
- Fixed an issue preventing reviewers from navigating away from an Excel Chart Sheet when clicking on a different sheet from the Markup Review Pane.
- Fixed an issue preventing a Spreadsheet Project from running if the only selected option is "Redact All Comments."
- Fixed an issue resulting in a timeout when reverting markups on a spreadsheet with millions of markups.
- To improve application performance, many minor changes were made to caching, indexing, and internal product logic.

# What's changed in the user guide

The following updates have been made to the user guide as of **May 12, 2025**.

## Migrating Markups Page Updated

- Migrating markups page updated for new workflows and destination saved search field.

## Instance Projects

- Instance Project page updated for new ui and changes to queue priority.

## Production Preparation

- Production Preparation updated with new individual document lock and download original file buttons.

## Blackout Permissions

- Added Individual Document Lock to permissions list.

## Blackout Field Searching

- Added Has Blackout OCR field.

## Blackout Version Support Policy

- Added additional info for version support and relativity requirements.

# Blackout Version Support Policy

- Relativity Server 2024 requires Blackout 5.1 or above.
- Blackout 4.8 and above require SQL Server 2016 with compatibility mode set to at least 130.
- The HTML Viewer is no longer supported as of Blackout 5.1.
- Support for the Blackout Usage API RAP ended with Blackout 5.1. While the app should continue to function, future plans should include transitioning to accessing client usage via SQL.

We are committed to providing top-notch support for our software. To ensure the highest level of performance, security, and compatibility, we support the current version of Blackout and up to two versions prior to the most recent release.

- **Supported Blackout Versions:** We fully support the latest version of Blackout and the two preceding versions. This is currently Blackout 5.2, 5.1, and 5.0.
- **Supported Relativity Versions:** Blackout is supported on Relativity Server versions 2022, 2023, and 2024.
- **Support Requests:** While we are happy to assist with support requests for most versions of Blackout, please be aware that resolving certain issues may require updating to the latest version of the software.

If you are running a version older than the two most recent versions, we strongly recommend updating to the latest version to receive the full benefits of our support services. By staying up-to-date with the latest version of Blackout, you ensure that your application is equipped with the latest features, performance improvements, and security updates.

For questions, or to receive the latest Blackout RAP file, please reach out [support@milyli.com](mailto:support@milyli.com).

## First-time installation

### Requirements

- **Important!** - Blackout 4 **requires** Relativity 10.0 or newer
- All browsers supported by Relativity 10.0 and newer
- **Must** be installed from the **Relativity system admin application library**

### What to expect

What you'll see

1. Installation should take just a few minutes
2. A new tab named **"Blackout"** has been added to the Relativity admin section
3. A new schema will be added to EDDS called Blackout
  - Blackout tables will be created using this schema in EDDS
4. Several configurations will be added to the Relativity configuration table under the section **Milyli.Blackout**

### Installing Blackout

Before you begin

1. Ensure that you have received the Blackout RAP file shared with you from Milyli's secure file sharing platform.
  - If you have not received the RAP, please contact [support@milyli.com](mailto:support@milyli.com).
  - The file will be delivered by Milyli's instance of Citrix ShareFile.
2. Blackout **must** be installed through the **Relativity application library**.
  - Ensure that you have access before beginning

How to install Blackout

1. Navigate to the **Application & Scripts | Application Library** tab in the Relativity Admin section.
2. Click **Upload Application**.
3. Click **Choose File**.

4. Select the Blackout RAP and click the **Open** button.
5. After the file uploads, click the **Save** button.
6. Next to **Workspaces installed** click the **Install** button.
7. Click the ... button next to Workspaces.
8. Check any workspaces where Blackout may need to be installed.
9. Click **Ok**.
10. Click the **Save** button.

## Submitting a license request

After successfully installing Blackout, a license request must be generated to retrieve a valid license from Milyli.

1. Navigate to the **Blackout | Configuration** tab in the Relativity admin section.
2. Click on **Generate License Request**.
3. Click **Copy License Request**.
4. Submit the license request body to [support@milyli.com](mailto:support@milyli.com).
5. Milyli will supply a license key in response.
6. Click on **Apply License**.
7. Paste the license key in the box.
8. Click **Apply Blackout License**.

## Pushing Blackout to a workspace

After applying the license Blackout can be installed into any workspace that you require.

**Note:** *It is required to push Blackout to workspaces via the Application Library.*

1. Navigate to the **Application & Scripts | Application Library** tab in the Relativity Admin section.
2. Filter for the Blackout Application and select it.
3. Next to **Workspaces installed** click the **Install** button.
4. Click the ... button next to Workspaces.
5. Check any workspaces that Blackout needs to be installed on.
6. Click **Ok**.
7. Click the **Save** button.

## Configuration

### Definitions

Resource	Definition
Blackout Agent	A single Relativity agent that handles all Blackout-related work. Manages tasks such as OCR, redactions, and document processing.

Project Worker	Prioritizes project-related tasks. Project workers process queued projects based on priority and will pick up viewer tasks when no project work is available.
Viewer Worker	Prioritizes viewer-related actions, such as Find & Redact, Excel burn-in, and OCR Ahead. Viewer workers can assist with project tasks when idle.
Worker Counts	The number of concurrent tasks that can be processed per server. Admins can configure how many workers are assigned to Project and Viewer tasks.

**Note:** Full details on configuring and setting up your agents for Blackout are covered in a separate section, [Agent Configuration & Set up](#).

## How to do it

1. Navigate to the **Blackout** tab then choose **Agent Configuration**.
2. Identify the desired agent server and select the **Enabled** checkbox.
3. Specify worker allocation:
  - Assign the number of **Project Workers** and **Viewer Workers** for that server.
  - By default, both work types are enabled.
4. Click **Save Configurations**.

## Verify Agent Installation

### How to do it

1. Go to **Server & Agent Management** tab then choose **Agents**.
2. Filter the **Application** column to **Blackout**.
3. The **Enabled** column should read **Yes**. The **Message** column displays active worker counts.

## Adding a Blackout server to a resource pool

### What to know

Resource pool aware agents allow system administrators to create dedicated agents for individual clients and workspaces, isolating their Blackout capacity from the rest of the system.

When resource pool awareness is **enabled**:

- Agents only pick up work for their assigned resource pool.

When resource pool awareness is **disabled**:

- All agents can process all Blackout work across the instance.



## How to do it

1. Navigate to **Blackout** → **Agent Configuration**.
2. Click **Enable Resource Pools**.
3. A new column will display each agent server's assigned pool.

# Upgrading Blackout

## Requirements

- **Important!** - Blackout 4.0+ requires Relativity 10.0 or newer
- All browsers supported by Relativity 10.0 and newer are supported
- All existing Blackout jobs must be completed, reverted, or stopped prior to beginning the upgrade
- Updates must be performed from the Relativity Application Library

## Upgrading from 3.3 or earlier

Blackout 4 will be a major upgrade for Blackout and will introduce system changes upon upgrade. In addition to introducing new functionality, the upgrade will make changes to your existing installation and additional steps may need to be taken immediately after the upgrade.

If upgrading to Blackout 4+ from Blackout 3.3 or lower, please contact [support@milyli.com](mailto:support@milyli.com). To learn more about specific changes, please refer to previous versions of this documentation and our [release notes](#).

## Upgrading from 3.4

If upgrading from Blackout 3.4, Blackout 4 introduces minimal changes to your system. There are no data migrations or schema changes between Blackout 3.4 and 4.

# Workspace tabs

## What to know

Adding Blackout to a workspace introduces the Blackout tab and several sub tabs. These tabs provide tools to client admins for working with documents at scale within the workspace.

Tab	Description
<b>Blackout Projects</b>	Create automation projects for working with large numbers of documents.
<b>Blackout External Markups</b>	Download and upload Excel and PDFs that can't easily be worked with in Relativity.
<b>Blackout Audits</b>	Download a CSV of manual actions taken with Blackout against documents in the workspace.
<b>Blackout Reports</b>	Generate CSVs of Relativity document fields at the document or markup scope for a saved search
<b>Blackout Settings</b>	Manage custom words and phrases for use with manual text redactions on spreadsheets
<b>Blackout Manual Failures</b>	View documents with failed markups. If needed, this section may also be used to download a CSV of the failures.
<b>Blackout Analyze</b>	Create a redaction-less project to analyze rules and see what documents may have markups placed

## Who has access?

By default, workspace and system administrators have access to all Blackout sub tabs. When a user has access to a Blackout tab, they can perform all actions available within that tab.

If access is needed for a single user, tab permissions can be granted per tab. For example, when a case admin wants to give a reviewer the ability to work with external markups, they can grant access to just the external markup tab.

## Granting tab access

1. In the workspace, navigate to **Workspace Admin** → **Workspace Details**
2. Select **Manage Workspace Permissions**
3. Select **Tab Visibility**
4. Select a group from the dropdown
5. Look for the Blackout tab and grant the group access to the tab

## Redacting images

### Automated image projects

#### Creating an image project

##### What to know

- Blackout can redact and highlight images in Relativity in bulk utilizing terms, phrases, and regular expressions.
- Image projects are a flexible way to target specific documents and locate content that must be marked up for the case.
- There is a wide range of workflows that can be utilized to accomplish many different goals. However, for this guide, we will focus on the basic tooling.
- Foreign language support is not enabled by default. To enable this setting, review the steps [here](#).

##### How to do it

1. Log into Relativity as a System Administrator or a user who has access to the Blackout tab
2. Navigate to **Blackout > Projects**
3. Click **Create New Project**
4. Select **Image**
5. Fill out the project form using the details below
6. Click **Create**
7. A form will be displayed that is used to define how the project will function when running.

The following fields make up the form:

Field	Description
<b>Project Name</b>	An identifier for the project, making it easy to refer to or for others to find.
<b>Language Code</b>	Code for specifying which languages should be used for OCR. <ul style="list-style-type: none"> <li>Not required to be changed away from 'eng' unless other language packs are installed.</li> </ul>
<b>Saved Search</b>	The document source. All actions will be performed against these documents.
<b>Markup Set</b>	The markup set that the markups will be associated with.
<b>Pre OCR and prepare documents for Find &amp; Redact</b>	Generate OCR for a set of images without running rules. This is required for Find & Redact to prepare documents larger than 2 pages. This can also be used for larger image projects to pre-OCR images before running rule-based projects.
<b>Rules</b>	The rules are what drives the project. <ul style="list-style-type: none"> <li>How they are configured will determine how the content will be located on each image. There are two different kinds of rule groups - Redaction and Highlight.</li> <li>Every time the fields are filled out for a rule group, another section will appear below it, allowing the creation of multiple rule groups. Each of these can be independently configured, targeting different sets of content.</li> </ul>
<b>Redact</b>	Redaction rules will result in removing the content from the document and replacing it with a black, white, text, cross, or inverse redaction.
<b>Highlight</b>	Highlight rules will result in changing the foreground color of the matched content with the selected color.
<b>Markup Reason</b>	A simple message that can be associated with the markups made by the rule group. It can be reviewed using the Blackout reports.

<b>Markup Scope</b>	<p>Defines the behavior of the project when placing a redaction or highlight.</p> <ul style="list-style-type: none"> <li>• Word - Will place the markup of the entire word where the match is located</li> <li>• Line - Will place the markup on the entire line of text</li> <li>• Paragraph - Will place the markup between the most recent previous carriage return and the next carriage return</li> <li>• Page - Will place a markup on the entire page</li> <li>• Character - Will place a markup on selected characters where a match is located</li> </ul>
<b>Gear Button</b>	<p>Clicking the gear button will expand another option called Expand Markup to Full Width of Page.</p> <ul style="list-style-type: none"> <li>• Checking this box will take any markup that is made for the rules and extend it from the left margin of the image to the right margin of the image.</li> </ul>
<b>Markup SubType</b>	<p>Specified whether to place a Black, White, or Text markup.</p> <ul style="list-style-type: none"> <li>• If text is selected, custom text can be input for the markup. Otherwise, the default text markup language will be used.</li> <li>• If the highlight is selected, this option will be replaced with choices for yellow, blue, green, orange, pink, and purple.</li> </ul>
<b>Word/Phrase</b>	<p>'Word/Phrase' are the words, phrases, and text that will be marked up across the document set.</p> <ul style="list-style-type: none"> <li>• Multiple words or phrases can be added to a single rule group.</li> <li>• These rules are case insensitive.</li> </ul>

<p><b>Regex</b></p>	<ul style="list-style-type: none"> <li>● Regular expressions can be used to identify important patterns like email addresses, social security numbers, credit card numbers, and any other content that may appear regularly throughout the document set that constitutes sensitive information.</li> <li>● Regular expressions require a name and an expression.</li> <li>● After saving the project, these regular expressions will be available to be selected by name on other projects within the same case.</li> <li>● Rules do not need to be added to create a project. Rules may be uploaded afterward, or the project can be edited and rules can be added later.</li> <li>● Blackout uses the PCRE flavor of regular expression <ul style="list-style-type: none"> <li>● Runs with the global flag (/g), multi-line flag (/m), and case insensitive flag (/i) enabled by default.</li> <li>● The case-insensitive flag can be modified inline by adding (?-i) to turn off and (?i) to enable.</li> </ul> </li> </ul>
<p><b>dtSearch</b></p>	<p>dtSearch includes special characters and other operators that you can use to define search criteria.</p> <ul style="list-style-type: none"> <li>● Noise words are not supported in Blackout Projects. Use the W/N operator for proximity matches in these instances.</li> <li>● By default, all terms in a dtSearch rule will be redacted. The terms should be surrounded with (?&lt;redact&gt;{term}) to redact part of a dtSearch rule.</li> <li>● To redact more than one term, multiple named groups must be defined.</li> </ul>

## Uploading rules from a CSV

After successfully creating the image project, rules can be added via uploading a template CSV.

## What to know

- Blackout can support up to 100,000 rules being created via CSV.

- Extra rules mean each doc takes a little longer to process as the image content needs to be checked for each rule.

The CSV template and explanation of the columns can be downloaded from the [Milyli Support Center](#).

## How to do it

1. From the project view screen, click the Upload Rules CSV button
2. Navigate to the completed CSV
3. Click the upload icon
4. If the CSV file is valid, the rules will be created, and the button will display how many rules have been uploaded.



## Running an image project

### What to know

- When a project is in a valid state to run, with a name, saved search, markup set, and rules, the status message of the project view screen will display that it is ready to run.

## How to do it

1. After creating the project, click the **Run** button.
2. Once the project begins running, the project will be queued and then start being processed by the Blackout Agent.

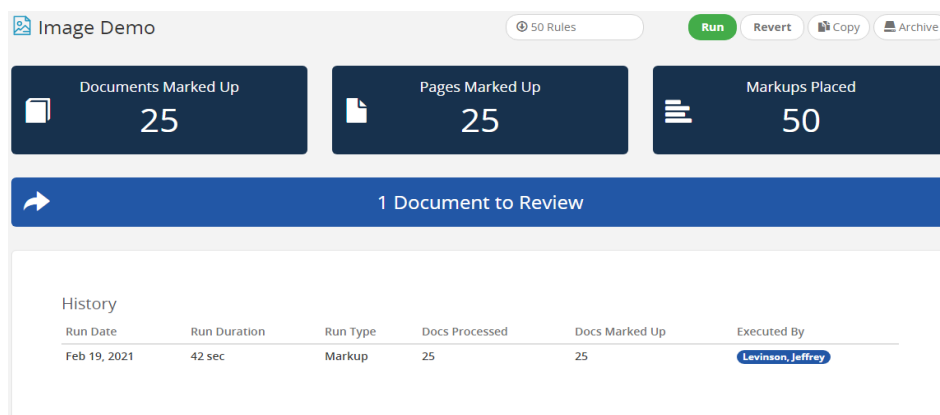
### While the project is running

While the project is running, the items below will be displayed.

Message	Description
<b>Documents prepared</b>	The number of documents that have been distributed to the system as tasks for markup review

<b>Documents completed</b>	The number of documents that have completed markup review, which can result in markups being placed if there are rules matches
<b>Progress bar</b>	Displays the number of actions completed for preparation and review. <ul style="list-style-type: none"> <li>The light blue color represents document preparation, and the dark blue represents markup review.</li> </ul>
<b>Time elapsed</b>	The total time the project has processed
<b>Current activity</b>	The current activities that the Blackout Worker Agents are performing which include preparation, reviewing, and marking up. <ul style="list-style-type: none"> <li>The most recent action is shown at the top along with when it began.</li> <li>Clicking the down arrow will display the currently active tasks and when the task began.</li> </ul>
<b>Stop</b>	Begins the stop operation, which will cancel all unfinished work for the project. <ul style="list-style-type: none"> <li>Work completed to that point will remain and can be reverted.</li> </ul>

After the project completes, a results page displays information about the completed work and provides a launchpad for further quality review.





### When the project is completed

When the project completes, the items below will be displayed.

Message	Description
<b>Documents marked up</b>	<p>The total number of documents that have had markups placed on them by Blackout using the rules from this run.</p> <ul style="list-style-type: none"><li>Clicking this button will navigate to a saved search of all the documents that have been marked up.</li></ul>
<b>Pages marked up</b>	<p>The total number of pages for each marked up document that have had markups placed on them.</p> <ul style="list-style-type: none"><li>Clicking this button will navigate to a saved search of all the documents that have been marked up.</li></ul>
<b>Markups placed</b>	<p>The total number of markups that have been placed, both redaction and highlight, by Blackout using the rules from this run.</p> <ul style="list-style-type: none"><li>Clicking this button will navigate to a saved search of all the documents that have been marked up.</li></ul>
<b>Documents to review</b>	<p>While Blackout does not require extracted text to review an image and place markups on, whenever extracted text is available it will perform an automated quality review on the placed markups.</p> <ul style="list-style-type: none"><li>This happens by looking at the number of matches that the project terms have in the extracted text and comparing them to the number of placed markups.</li><li>If a rule has less placed markups than there are matches in the extracted text, the rule is flagged, and the document is marked for review.</li><li>Clicking this button will navigate to a saved search of the documents requiring review.</li></ul>
<b>Documents with warnings</b>	<p>The number of documents that encounter a non-project breaking warning.</p> <ul style="list-style-type: none"><li>Clicking this button will download a CSV of the document warnings that include information about what happened and any error messages.</li><li>Providing this CSV to Milyli can greatly assist in diagnosing any issues that may have been encountered. Typical reasons for warnings include missing images or failed OCR.</li></ul>

<b>History</b>	<ul style="list-style-type: none"> <li>• Projects are incremental.</li> <li>• After the project has run, clicking the Run button again will queue the project up again and process any new documents in the document source. <ul style="list-style-type: none"> <li>• As a result, the history section will show the work that the project has performed and the results of said work.</li> </ul> </li> </ul>
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## Reverting an image project

### What to know

- Occasionally the markups created by an image project may need to be reverted.
- This need may arise when rules need to be modified or a case settles.

### How to do it

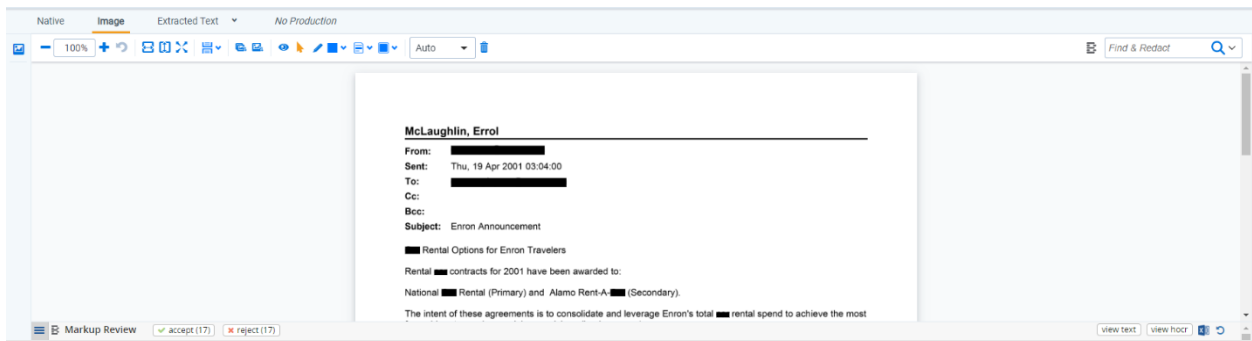
1. From the project view screen, click the Revert button
2. A dialogue will appear; confirm reverting the project
3. The project will be queued
4. The Blackout Agents will pick it up and begin reverting the documents marked up by the project
5. A progress bar will display how many documents have been reverted

## Find & Redact

### Executing Find & Redact

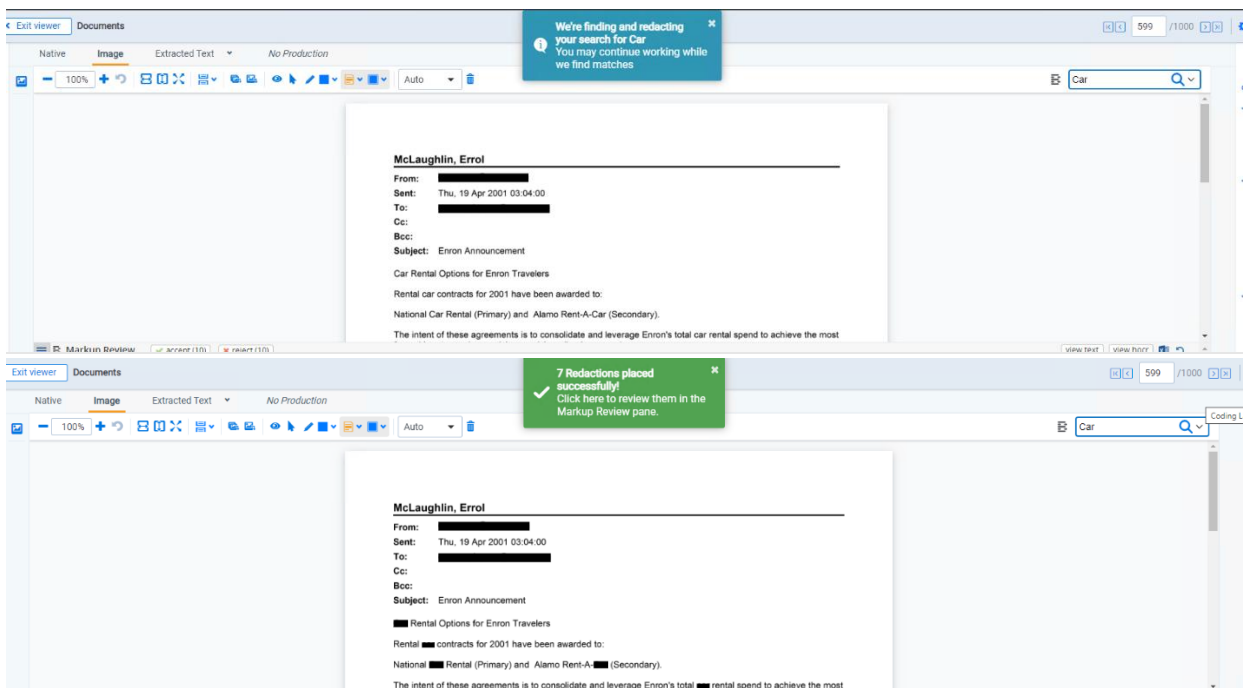
### What to know

- Images now contain a Blackout Find & Redact search box in the top right corner in Blackout 4.7 and above.
- Find & Redact respects existing Relativity Redaction privileges and can place any type of image redaction.
- Images over 2 pages must be OCR'd via a Blackout Image Project before Find and Redact is available to reviewers.



## How to do it

1. Open an imaged document.
2. Select the redaction type or highlight to place.
3. In the Find & Redact search bar, type the term or choose a Preconfigured Search Rule from the drop down to redact the document.
4. A message will appear while the redaction is processing. A green success message will appear when the redactions have been placed



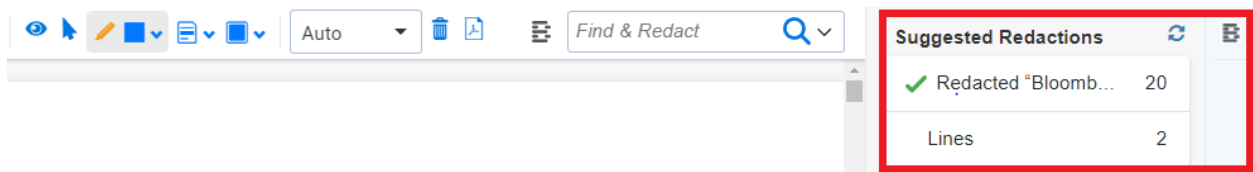
## Find & Redact Markup Review

Once redactions have been placed, they can be accepted or rejected through the Markup Review pane. The rule column will populate with the term or Preconfigured Search Rule that was selected in the Find and Redact search bar.

Markup Review <span>✓ accept (3)</span> <span>✗ reject (3)</span>								
view text view hocr								
1 - 3 of 3								
Approved	Origin	Page	Marked Text	Rule	Markup Type	Markup SubType	Markup Text	Markup Set
✓ ✗	Find & Redact	1	Devon	Devon	Highlight	Blue		Primary
✓ ✗	Find & Redact	1	proin@lorem.com	mail(*)	Highlight	Blue		Primary
✓ ✗	Find & Redact	1	proin@lorem.com	mail(*)	Highlight	Blue		Primary

## Redaction Suggestions

Blackout Redaction Suggestions adds a new card onto the Aero Image Viewer to the left of the coding pane. This card will display a list of suggested terms to redact on the current document being reviewed.



## Creating Suggestions

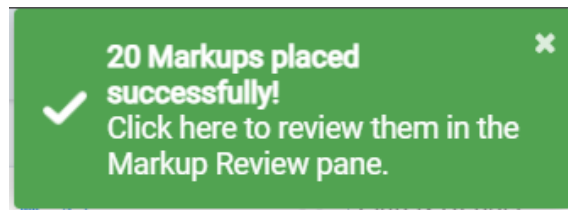
Only terms marked up at least twice will be displayed as a suggestion by default. When the following actions are taken in the image viewer, Blackout will provide suggestions to the user based on the markup:

- Manually placing a new markup
- Moving an existing markup
- Executing a Find & Redact operation

## Placing Redactions Using Suggestions

Once suggestions have been generated, a notification will begin appearing for users when they navigate between imaged documents. Clicking this notification will open the Redaction Suggestions pane and allow users to see the suggested markups. Alternatively, users can manually open the pane by clicking the Blackout logo to the right of the Find & Redact search bar.

Suggestions will appear in descending order based on the frequency of markups that would be applied when accepting them. Clicking on a suggestion will redact the suggested term with the selected markup style in the image viewer. Please remember to use the refresh button in the top right of the QC pane to view the new entries added after a Suggested Redaction is placed. Alternatively, the notification that appears can also be clicked to refresh.



## Redaction Suggestion Instance Settings

Several Instance Settings under the section Milyli.Blackout can be used to customize Redaction Suggestions.

Setting Name	Description
ImageRedactionCoverageThresholdPercent	Controls the percentage of a word that needs to be covered by an image redaction to be considered redacted by the Blackout Redaction Assistant pane.
MinimumContentRedactionCountThreshold	Controls the number of times a particular term needs to be redacted in order to have suggestions populated for a user.
RedactionAssistantOcrThreshold	Controls the maximum number of pages allowed on a document for automatic OCR to take place on the document viewer when navigating doc to doc.
DefaultRedactionSuggestionBehavior	Controls the default behavior for identifying what suggestions to provide to reviewers. When set to "CurrentReviewers," the default behavior is to suggest markups based on the markups placed by that reviewer. If set to "AllReviewers," all markups within the workspace are used to determine what suggestions to provide. This default can be overridden in the Blackout Settings tab within each workspace.

## Image quality control

### The Blackout Markup Review Pane

#### What to know

- Once Blackout processes a set of documents, the reviewer can then use the Blackout Markup Review Pane button to review the applied redactions and highlights from within the Relativity viewer.
- Markups are applied only to the image of a document, so to review redactions and highlights, open the document and select the Image view.

- Once the document viewer is in Image view, and a document has markups, the document navigation bar will appear below the viewer with the Blackout Markup Review Pane button now visible.

## Using the Blackout Markup Review Pane

### What to know

- The Blackout Markup Review Pane will show all markups on the document, including those created both by Blackout and those that were placed manually.
- Markups from all markup sets will appear in the Blackout Markup Review Pane.

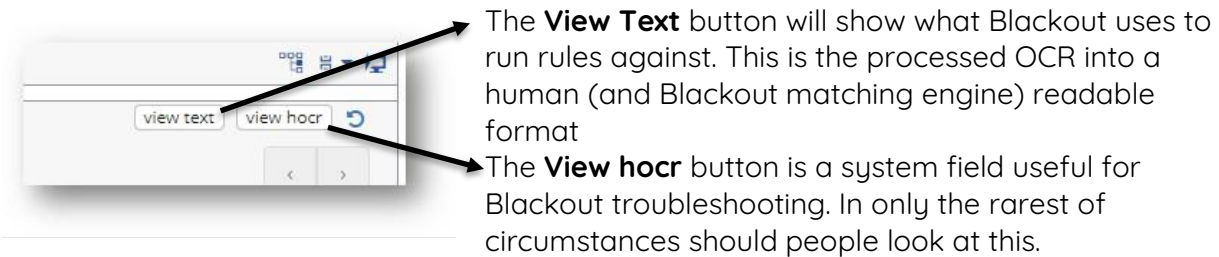
### How to do it

1. Choose which markup set should be reviewed from the dropdown in the Blackout Markup Review Pane.
2. The columns in the Blackout Markup Review Pane will show the information below about each markup.

Column Name	Description
<b>Approved</b>	For all markups created by Blackout, there will be an Accept button and a Reject button
<b>Origin</b>	This column shows how the markup was created
<b>Page</b>	This column indicates on which page the markup appears
<b>Marked Text</b>	This column shows the text that is hidden by the markup
<b>Rule</b>	This column shows the rule used to create the markup
<b>Markup Type</b>	This column indicates the type of markup applied - redaction or highlight
<b>Markup Subtype</b>	This column indicates the subtype - such as black box, cross, text, or the highlight color

<b>Markup Text</b>	If the Markup Subtype was set to “Text,” this column will show the text within the markup
<b>Markup Set</b>	This column indicates the markup set to which the redaction or highlight belongs

## View Text and View hocr Buttons



## Accepting & rejecting markups

### What to know

- After a Blackout job processes the document set, all the generated markups will appear within the document as “unresolved markups,” that is, markups requiring action from the reviewer to accept or reject them.
- Accepting and rejecting markups is done within the Blackout Markup Review Pane, using the Accept or Reject buttons.

### What to consider

- If a markup is accepted, that markup is kept within the document.
- If a markup is rejected, the markup is removed from the document.
- Either way, the markup will no longer be considered “unresolved,” and the markup will remain in the Blackout Markup Review Pane where the reviewer can change the resolution as needed.
- If a Blackout markup is manually edited before it is rejected or deleted, and is subsequently accepted, the markup will return to the state it was in before it was manually edited.

## The Blackout - Has Unresolved Markups field

### What to know

- Blackout creates a **“Blackout Has Unresolved Markups”** document field upon install of the application.
- Any document that has been processed by Blackout will have a **“Yes” or “No”** value for this field.
- Documents that have not been processed by Blackout will have a value of “Unset.”
- This field is useful in determining which documents have been processed by Blackout, as well as which documents have unresolved redactions or highlights.

## Reviewing images flagged for redaction

### Reviewing images


#### What to know

- If a document has extracted text, Blackout will automatically compare the rules to the extracted text and cross-check it with the markups placed for each rule.
- If the number of markups placed by a rule is less than the number of matches in the extracted text, the document will be flagged for review and indicated in the project results.
  - A Relativity document field, Blackout Needs Quality Review, will be marked as yes.

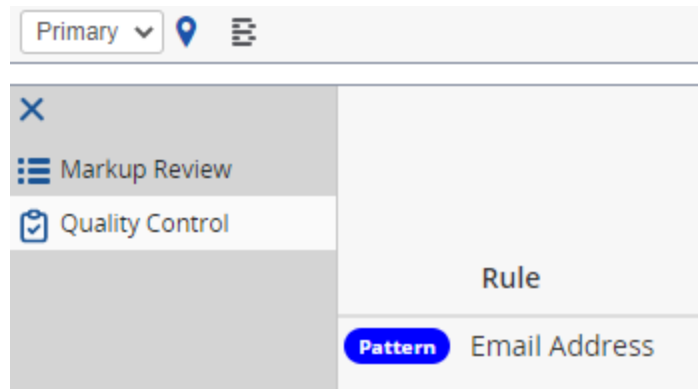
#### How to do it

1. From the project complete page, the number of documents that need review will be indicated on the dashboard.
2. Click on the **Documents to Review** button.
3. This will navigate to a saved search containing the documents that need to be reviewed.
4. Click on a document in the document list.
5. Switch to the **image viewer**.
6. In the bottom left of the viewer, next to the markup set selection, click on the Blackout Markup Review Pane button.



7. Open the Markup Review Card sub-menu by clicking the  button. Then choose **Quality Control**.



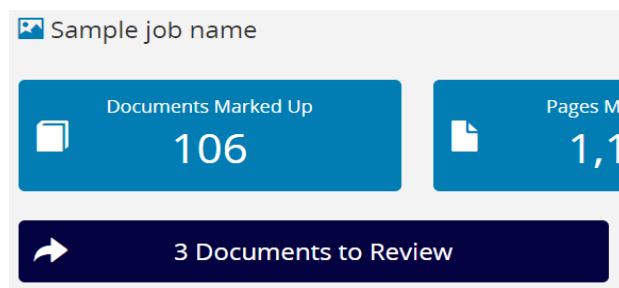


## What else to consider

- For each rule where the markups expected are less than the markup are placed, the numbers will be displayed letting the user know how many redactions will need to be added for each rule.

			Reviewed: <input type="checkbox"/>
			1 - 1 of 1 < >
	Rule	Placed	Expected
	<b>Pattern</b> Email Address	3	4

- After the markups have been adequately placed, click the Reviewed checkbox.
- This updates the Blackout Needs Quality Review flag for the document to False.
- After reviewing a document, the project page will automatically update as well as the document to review saved search.



## Image template projects

### Setting up an image template project

#### What to know

- An image template project can be used to propagate all the markups from the images of a document to all the documents in a saved search.

- This is an effective way of marking up, for example, a form that contains personally identifiable information in the same spot on each document.
- Creating a template project is like creating image and spreadsheet projects.

## How to do it

1. Navigate to the **Blackout > Projects** tab.
2. Click the **Create New Project** button.
3. Choose **Image Template Project**.
4. A form will be displayed to set up the project.
5. Input the project name to quickly identify the template project.
6. Select the saved search that contains the documents that should have the template markups propagated from.
7. Select the markup set that the markups will be created on.
8. Input the control number that contains the markups that should be propagated to the documents in the saved search.
9. Click the **Create** button.
10. The project run page will be displayed.

## Running image template projects

1. After the project has been successfully created, propagate the markups to the saved search by clicking 'Run.'



2. The project will be queued, like other project types. While the project is running, details about progress will be displayed.
3. After the project completes, results will be displayed with details about the completed project.

### Results described

Name	Description
<b>Documents marked up</b>	<p>The total number of documents that have had markups placed on them by Blackout using the rules from this run.</p> <ul style="list-style-type: none"> <li>• Clicking this button will navigate to a saved search of all of the documents that have been marked up.</li> </ul>

<b>Pages marked up</b>	<p>The total number of pages for each marked up document that have had markups placed on them.</p> <ul style="list-style-type: none"> <li>Clicking this button will navigate to a saved search of all of the documents that have been marked up.</li> </ul>
<b>Markups placed</b>	<p>The total number of markups that have been placed, both redaction and highlight, by Blackout using the rules from this run.</p> <ul style="list-style-type: none"> <li>Clicking this button will navigate to a saved search of all of the documents that have been marked up.</li> </ul>
<b>Documents with warnings</b>	<p>The number of documents that encountered a non-project breaking warning.</p> <ul style="list-style-type: none"> <li>Clicking this button will download a CSV of the document warnings that include information about what happened and any error messages.</li> <li>Providing this CSV to Milyli can greatly assist in diagnosing any issues that may have been encountered. Typical reasons for warnings include missing images.</li> </ul>

## Foreign language support

### Multi-language support

#### What to know

- Blackout supports over 100 language packs.
- These language packs can be mixed and run together in a single image project or excluded from use in a project altogether.
- The higher level of accuracy of a language pack, the slower it will run.
- Blackout and Tesseract use the alpha-3 code for the representation of names of languages. To understand which code corresponds to which language, please refer to [\*ISO 639.2\*](#).

#### Language packs

- The most accurate language packs are available for download from the tessdata GitHub page: [\*Tessdata language packages\*](#)
- A version that processes more quickly, but is less accurate can also be used if the time on a project is tight: [\*Fast tessdata language packages\*](#)
- Packages from the more accurate language packages will be used for this guide

## What else to consider




- Milyli **does not** provide support for the accuracy of a language pack.
- In some cases, you may have better results running a language pack in isolation, even if English exists on the documents.
- Always test a sample set of documents before running the full set.

Blackout and Tesseract use the alpha-3 code for the representation of names of languages. To understand which code corresponds to which language, please refer to [ISO 639.2](#).

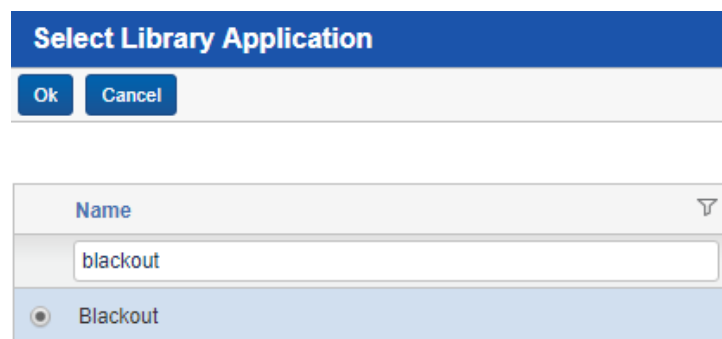
## Installing additional language packs

### How to do it

1. Navigate to the Tesseract Language page.
2. Locate the language that will be used in the case using the 3-letter code from ISO 639.2 link above.

 <a href="#">snd.traineddata</a>	remove legacy model from indic and arabic script languages	last year
 <a href="#">spa.traineddata</a>	Remove cube components from traineddata and update version component	last year
 <a href="#">spa_old.traineddata</a>	Update LSTM Models to intequerized tessdata_best for files < 25mb	last year

3. Click on the link for the trained data.
4. Click the **Download** button to download the trained data.
5. Log into the Relativity environment as a System Administrator.
6. Navigate to **Application & Scripts > Resource Files**.
7. Click **New Resource File**.
8. Click the ... button next to Application.
9. Search for and select **Blackout**.



Select Library Application

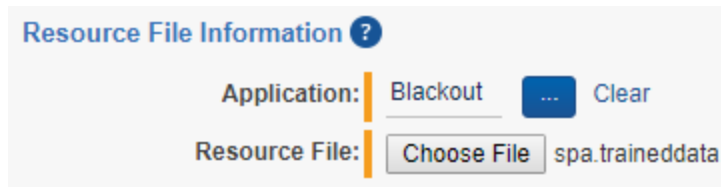
Ok Cancel

Name

blackout

☒ Blackout

10. Click the **Ok** button.
11. Click the **Choose File** button for the **Resource File** field.
12. Navigate to and select the trained data file that was downloaded.



The dialog box is titled "Resource File Information" with a question mark icon. It contains two sections: "Application:" with a dropdown menu set to "Blackout" and a "Clear" button; and "Resource File:" with a "Choose File" button and the text "spa.traineddata".

13. Click the **Save** button to add the resource to Blackout.

**Note:** Blackout will automatically load the file and it will be available for use in image projects. English is loaded by default, so there is no need to upload the trained data for it.

## Enabling language support for image projects

### What to know

- By default, Blackout will not be in multi-language mode.
- To enable multi-language mode, a new instance setting will need to be added and set to true.

### How to do it

1. Log into the Relativity environment as a System Administrator.
2. Navigate to the Instance Settings tab.
3. Search for MultiLanguageMode for instance setting name and confirm it does not exist.
4. If it does exist, change the value to True.
5. If it does not exist, click the New Instance Setting button.
6. Input the following values:

Setting	Description
<b>Name</b>	MultiLanguageMode
<b>Value Type</b>	True/False
<b>Value</b>	True
<b>Initial Value</b>	True
<b>Section</b>	Milyli.Blackout
<b>Encrypt</b>	No
<b>Description</b>	Enable the ability to specify a language for image projects.

7. After creating or updating this instance setting, a language field will now be visible on the image project create and edit page.

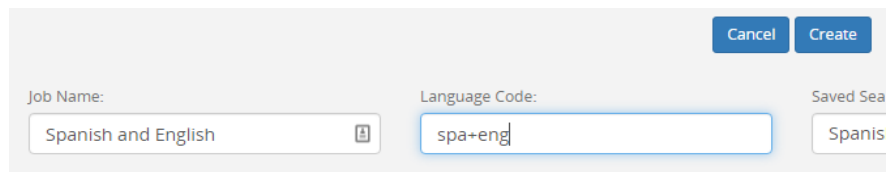
## Running non-English language projects

### What to know

- By default, all image projects will run with the language code 'eng'.
- Running projects for other languages is straightforward.
- To determine the language code that should be used, refer to the trained data file. The letters that appear before the decimal will be used as the language code in the project.

### Project example

- In this example, the Spanish language trained data will be used to OCR and review the documents in the saved search.
- To get the best results, there are a few very important things to note:
  - Multiple languages are supported.
  - Whenever there is a chance that the language being used will be combined with another language, such as English, both sets of trained data can be used at once. To do so, simply join the language codes with the plus (+) symbol.
  - The languages will be prioritized from left to right.
  - In this sample, Spanish matches will be prioritized first, and then English matches.



The screenshot shows a form with three main sections: 'Job Name:', 'Language Code:', and 'Saved Search:'. The 'Job Name:' field contains the text 'Spanish and English' and has a small icon to its right. The 'Language Code:' field contains the text 'spa+eng'. The 'Saved Search:' field contains the text 'Spanis'. At the top right of the form are two buttons: 'Cancel' and 'Create'.

### Document language setting in Relativity

- Documents should be loaded into Relativity with the proper language settings.
- This is an important component of interacting with images for non-English languages and a critical requirement for non-Romance languages.
  - For example, if documents with Japanese text are being run through Blackout, they will need to be loaded from a processing engine that supports processing Japanese documents with the appropriate language settings.
- If using Relativity processing, this is as simple as selecting the Japanese language in either the processing set or processing profile.
- This ensures that the extracted text is encoded correctly and can be used for comparison when determining how much QC is needed.

# Native redaction preparation

## Blackout Permissions

### Securing manual markups

- The Manual Redactions experience can be secured by setting workspace permissions
- By default, only system administrators have permission to perform manual redactions, highlights, and other actions on PDFs, Spreadsheets, and Images

### How to secure markups

1. Log into Relativity as a System Administrator
2. Navigate to the workspace where permissions need to be secured
3. Navigate to Workspace Admin → Workspace Details
4. Click Manage Workspace Permissions under System Settings
5. Click the Edit Permissions button next to the group you want to modify
6. Scroll to the section labeled Blackout
7. Pick the required permissions

### Permission details

Permission	Description
<b>Place/Edit Manual Spreadsheet Redaction</b>	Grants the group access to perform the following options on spreadsheets: <ul style="list-style-type: none"><li>• The redaction sub right-click menu</li><li>• Ability to redact charts, comments, headers, footers, objects, and sheet names.</li></ul>
<b>Place/Edit Spreadsheet Manual Highlight</b>	Grants the group access to the highlight options in the right-click menu on spreadsheets
<b>Clear Spreadsheet Markups</b>	Grants the group access to the Clear Markup Set button on the Blackout toolbar at the bottom of the viewer
<b>View Image Quality Control Panel</b>	Grants the group access to view the image Quality Control Menu

<b>Accept/Reject Spreadsheet Quality Control Entries</b>	Grants the group access to the Accept and Reject buttons on the Blackout Quality Control associated items pane for spreadsheets
<b>Input Custom Spreadsheet Redaction Text</b>	Grants the group access to the option for supplying their own custom text when placing a Text Redaction in spreadsheets
<b>Place/Edit Manual PDF Redaction</b>	Grants the group access to perform the following actions on PDFs: <ul style="list-style-type: none"> <li>• Drawing redactions with the top Blackout toolbar</li> <li>• Redacting annotations and attachments with the PDF markup reviewer bottom pane</li> <li>• Toggle visibility on the top redaction toolbar</li> <li>• Accept and reject markups on the PDF markup reviewer bottom pane</li> </ul>
<b>Place/Edit Manual PDF Highlight</b>	Grants the group access to draw highlights in PDFs with the top Blackout toolbar
<b>Clear PDF Markups</b>	Grants the group access to the Clear Markup Set button on the Blackout toolbar at the bottom of the viewer in PDFs
<b>Accept/Reject PDF Quality Control Entries</b>	Grants the group access to the Accept and Reject buttons on the Blackout Quality Control associated items pane for PDFs
<b>Accept/Reject Image Quality Control Entries</b>	Grants the group access to the Accept and Reject buttons on the Blackout Quality Control associated items pane for Images
<b>Blackout Analyze</b>	Hide or show the Blackout Analyze tab
<b>Lock/Unlock Native Documents</b>	Grants the group access to the lock and unlock individual document button in the excel viewer when a document is locked for production

## Securing mass actions

### Mass actions

- Several mass actions exist to help streamline or prepare documents for review.



- These can be secured using the built-in Relativity permission tooling.

Mass action	Description
<b>Unhide Excel Content</b>	Grants the user access to unhide hidden content on multiple documents at a time. This will also perform the Blackout document preparation step on the documents, allowing the documents to be marked-up immediately, without the need to designate the markup set first.
<b>Revert Native Redactions</b>	Grants the user access to revert marked-up documents back to the original pristine native. Reverts markups on the selected markup set.
<b>Convert Spreadsheet Markups</b>	Provides tooling for converting markups on excel documents from one type to another across a set of documents.

## How to do it

1. Log into Relativity as a System Administrator.
2. Navigate to the workspace where permissions need to be set.
3. Navigate to **Workspace Admin** → **Workspace Details**.
4. Click on **Other Settings**.
5. Select a group from the **Select a Group** dropdown.
6. Grant access to the Blackout mass actions detailed above.

## Native markup sets

### What to know

- Blackout shares the Relativity Markup Set for the current workspace
- Each new markup set that is added to the workspace will be available for use with Blackout native redactions
- Files may be marked up in different ways or by different parties using markup sets, just like with Relativity image markups
- When creating an automated spreadsheet or PDF project, all markup sets are displayed

## Adding new markup sets

To make a new markup set available for use in Blackout, follow these steps.

1. Log into Relativity as a System or Case Administrator
2. Navigate to the workspace where multiple markup sets are needed
3. Navigate to **Case Admin** → **Markup Sets**
4. Select **New Markup Set**
5. Input a Name, Order, and Redaction Text
  - Redaction text will serve as the default text for all manual PDF text redactions
6. Click **Save**
  - New markup sets will be immediately available for use with Blackout

## Switching markup sets

- Blackout displays markups based on the selected markup set at the bottom left of the viewer
- When navigating between documents, the active markup set is remembered on a user-by-user basis and selected automatically
- The 'None' markup set will always display the original document and cannot have markups added to it
- Picking another markup set from the dropdown will swap the displayed markups to the selected markup set
- If there is only one markup set in the workspace, then only None and that markup set will be available for selection
- Only the markup sets that the user has permission to will be displayed

## Multiple markup sets

- Each user can view the markups for any markup set simultaneously
- If multiple users navigate to the same document and pick different markup sets, they will both be presented with a copy of the document and can place redactions and highlights.
- Both sets of user markups will be saved and retained automatically.

## Securing markup sets

- Blackout automatically respects the security of a markup set.
- If a user is restricted from a markup set, Blackout will prevent them from viewing the markup set, placing new markups, or modifying existing markups for that markup set.

## How to secure markup sets

1. Log into Relativity as a System or Case Administrator
2. Navigate to the workspace where multiple markup sets are needed
3. Navigate to **Case Admin** → **Markup Sets**
4. **Click the Lock icon** to the left of the markup set to be secured
5. Click **Overwrite Inherited Security** to switch it to 'On'
6. Click **Add/Remove Groups** button
  - By default, all groups that have access to the workspace will be displayed here
7. Remove the group that should not have access to the markup set
8. Click the **Save** button
9. Click the **Close** button
  - The Lock icon will become locked
  - After making this change, members of the group will no longer see the option to select that markup set.

## Deleting markup sets

- After a markup has been placed on a markup set for a PDF document, the markup set becomes associated with several Blackout multi-object fields based on the type of markup.
- This includes the fields that can be used to search for external markups, manual markups, and automated markups by markup set.
- Attempting to delete the markup set will result in an error message, letting the user know the action can't be completed.
- In order to delete the markup set, all markups placed on PDF documents associated with the markup set to be deleted must be removed
  - This can be accomplished by using the revert markup mass actions on all documents associated with that markup set.

## Marked up file download

- Downloading the PDF from Relativity will always download the original native
- To download a redacted copy of the native, the user must click the Download Marked Up File button
- For larger PDFs, the file may take a few moments to download as markups are being burned-in on the fly

## How to download the file

1. Navigate to the document in the Relativity viewer
2. Select the markup set to preview

3. Click the **Download Marked Up File** button

## Redacting Excel

### Excel version support

Blackout supports the following Excel 95 file types and newer: Excel 95, Excel 95/97, Excel 97, and Excel 2003. These have a different file structure compared to modern Excel files but are supported by Blackout.

- All XLS
- XLSX
- XLSM
- XLSB
- CSV files
- TSV files

Blackout does not support the following versions and file types:

- Excel 5.0 and Excels created in earlier versions of Excel

### Manually marking up documents

#### Document preparation

Before you begin

- Prior to review, we suggest executing the Unhide Excel Content mass action on the documents set for review.
- If skipped, Blackout will still prepare the Excel file when a reviewer places the first markup. The **Unhide Excel Content** button has been removed from the Document Viewer as this will now be an automatic action if the document is not prepared beforehand.
- Doing this will identify document preparation issues prior to review and avoid reviewers running into preparation errors.

#### The document preparation step will:

- Replace all calculated fields with their original calculated values
- Replace all pivot tables with their original calculated values

- Remove all change-history from documents
- Unhide all hidden and very-hidden rows, columns, and sheets
- Unmerge all merged cells

**This step ensures that:**

- Data is not lost after content is removed from document
- That all data is visible to reviewers
- That content can't be restored after markups are placed

## What to know

- When the first markup is placed on an Excel, Blackout will automatically prepare the Excel file for markups if not completed prior to review.
- Document preparation is now done behind the scenes and users no longer see or must wait for the document preparation message.
- This is done so documents can be safely marked up to prevent historical information from being restored.

## Redactions and highlights

### What to know

- Enables users to markup documents directly without taking the file out of Relativity
- Updates are performed live allowing quick review and markup of Excel documents
- Blackout maintains audits of all actions taken

### How to do it

1. Navigate to the Excel document in the Relativity viewer.
2. Switch the **Native Markup Set** to Primary or one that was created earlier.
3. Select the cells, column, or row that will be marked up.
4. **Right-click** to bring up the options menu.
5. Hover over the **Blackout** menu.
6. Hover over the **Redact** menu.
7. Choose to place a Black, White, or Text redaction.




### Repeat Last Action

- After a Redaction has been placed you may repeat the same redaction in a new cell by opening the right click menu again. You will see a new option appear that will have the name of the previous redaction placed. Clicking this option will place the same type of redaction you did previously in the new cell.
- You can also complete this action with a Keyboard short cut by hitting CTRL+B.

## Document Status

- The document status will display in the bottom right corner of the viewer.
- When placing markups, they are queued behind the scenes. The user can continue working as Blackout saves the applied markups without interrupting the end user.

### Document Status Descriptions

Status	Description
Applied 	When all markups are successfully applied on the document. The <i>Last Saved Time</i> will be displayed.
Processing 	Displayed when new markups are drawn on a document and Blackout is applying the markup.
Failed 	When Blackout is unable to draw a markup on a document. Additional markups cannot be applied once the document is in a failed state. Reviewers can move to the next document to continue the review. Failed markups will be saved and can be retried or deleted. Refer to the Manual Excel troubleshooting page regarding details for troubleshooting and resolving failed markups.

### What else to consider

- If this is the first markup being placed on the document and the Unhide Excel Content mass operation or button has not been clicked, Blackout will automatically prepare the document.

## CSV Redactions

As CSV files are text files, they are restricted to having only text redaction placed on them. CSVs can be included in spreadsheet projects either alone or alongside Excel files.

Support for manual text redaction has been added but is limited to Relativity Server 2022. Prior to Relativity Server 2022, CSV files are not displayed in the viewer with table styling limiting the ability to identify where the user is clicking within the CSV. As a result, manual redaction is not available for Relativity 10.3 and Relativity Server 2021.

While manual redaction for CSV is not available on the viewer in Relativity 10.3 and Relativity Server 2021, you can redact CSV using Blackout Spreadsheet Projects. CSV redactions will display in the Markup Review Pane when viewing redacted CSVs on the viewer in these versions and can be accepted and rejected.

In addition to project and manual support, we have also added CSV support for external redactions, and propagation projects. All manual failure workflows behave identically to existing spreadsheet workflows for CSVs.

## Handling CSV Delimiters and CSV Qualifiers

Blackout provides support for double quote and single quote qualifier characters.

The following delimiters are supported (presented in order of detection priority):

- Comma
- Tab
- Semicolon
- Colon
- Space

In the event none of the above delimiters are detected, Blackout treats the CSV as a single column CSV. Blackout will provide document warnings indicating which CSVs failed to match on a delimiter to assist with identifying which documents may require manual review.

## Text Redactions

### What to know

Blackout provides two methods for placing text redactions:

1. Replacing the entire cell content with different text
  2. Replacing just specific words inside a selected cell
- Depending on how the workspace has been configured, several different options may be available. The following items may differ:
    - The case administrator sets the default text
    - Additional options may be available in a dropdown defined by the case administrator
    - If a user does not have permission to input custom text, only the default text and dropdown will be available
  - After placing a text redaction, a placeholder will be displayed so the page does not refresh
  - When the viewer is refreshed, the redaction will be displayed within the cell

- When inputting custom text, it is saved for each user individually so it can be used again
- When redacting multiple cells, an off-white highlight will be displayed in the corners of the selected area
- Specific cell content can also be redacted

## Changing text redaction options

Blackout Administrators have access to the Blackout settings within the workspace.

- On the **Blackout Settings** tab, additional terms that a reviewer can select from when placing a text redaction, and the default redaction text, can be defined.

### How to do it

1. Log into the workspace as a System Administrator or a user with access to the Blackout Settings tab.
2. Navigate to **Blackout** → **Settings**.
3. To change the default text for the workspace, update the **Default Redaction Text** field.
4. The new default text will be saved automatically.
  - This is represented by a small green checkbox
5. To add new custom text that will display in the dropdown for reviewers, type in the new text and click **'Add'**.
6. To **remove** an option, **click the red X**.

### What else to consider

- Custom options are a great way to ensure that users utilize the redaction text needed for a case without typing them in every time.
- Custom options can be combined with removing the Input Custom Redaction Text for a group. When doing so, the user will only be able to select the custom text options. This simplifies text redactions for end users.

## Cell content redactions

### What to know

Cell Content may alter the styling of the cell. Alterations are determined by multiple factors:

- Background colors, patterns and borders will be maintained
- Font, size, and font color will be maintained, however, only the very first font and color can be kept



- For example, a cell has the first word as [Arial, Bold, 12px, and Red] and the second word as [Courier, Italic, 14px, and Blue], the [Arial, Bold, 12px, and Red] style will be kept for all text inside the cell
- Both styles can't currently be kept after modification, so the first style is retained

## How to redact cell content

1. Select the cell with the content that will be redacted.
2. Select the cell content option in the markup right-click menu.
3. A text editor will be displayed for editing the content.
4. Add the desired redaction text.
5. Click Save.
6. After placing a cell content redaction, a placeholder will be displayed so the page does not refresh:



**Note:** The placeholder is added to increase performance and reduce the number of refreshes occurring during the redaction process as refreshing can cause increased resource usage.

## Reverting markups

### What to know

- Redacting documents with Blackout directly manipulates a copy of the original document and places those markups directly on the document.
- Reverting markups manually is a critical component of both reviewing markups made by automated projects and correcting mistakes made when redacting a document.

### How to do it

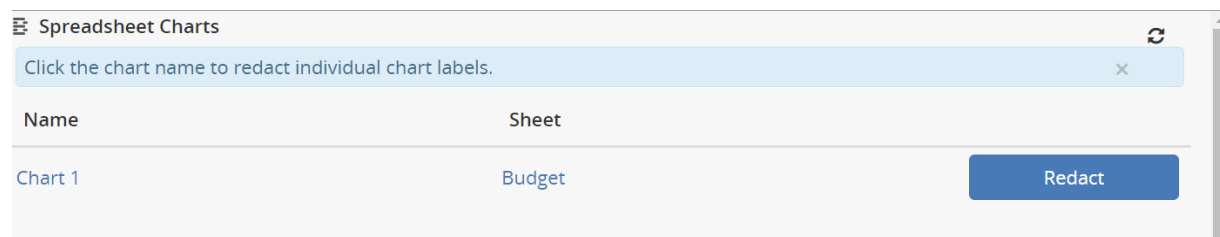
1. Select the cells that will be reverted.
2. **Right-click** to open the Blackout menu and select **Revert Markup**.
3. A message will be displayed that the markup is being reverted.
4. After a brief delay, the document will reload, and markups will be reverted to the original data.

# Using the Blackout Markup Review Pane

## What to know

- **As of Blackout 4.1, the Blackout Native Redaction Assistant has been moved into the Blackout Markup Review Pane.**
- All options for redacting charts, comments, headers & footers, objects, and sheet names are now located within the Blackout Markup Review Pane, as shown below.
- The Blackout Markup Review Pane remembers the state the user was on and will automatically display if the user had the card open. For example, if a user is redacting comments and navigates to the next document, the Blackout Markup Review Pane will still be open to the comments menu.
- When using the Blackout Markup Review Pane to redact charts and objects, **only the Black markup type is available.**

## Redacting Charts





## What to know

There are two different ways to redact charts with Blackout:

1. Replace the full chart with a black box redaction
2. Redact the static text labels

## How to do it



1. In the lower left corner of the viewer, locate and open the **Blackout Markup Review Pane** using the  button.
2. Click the  button to open the sub-menu.
3. Click the **Charts** menu item.
4. To redact full charts, click **Redact**.
  - Clicking on the sheet name will navigate to the sheet where the chart resides
  - To reduce the amount of reloading, the redaction won't appear on the document right away
  - Click **Unredact** to remove the full chart redaction.
5. To redact chart labels, simply click the name of the chart and choose the values to redact.

## Redacting Comments

### What to know

- Comments can be redacted quickly across the entire document.
- Redactions placed on comments will display in the hidden items comment viewer **after the document is reloaded**.
- Comments can be redacted en-masse using [Spreadsheet Projects](#).
- Blackout does not currently support the redaction of threaded comments.

### How to do it

1. In the lower left corner of the viewer, locate and open the **Blackout Markup Review Pane** using the  button.
2. Click the  button to open the sub-menu.
3. Click the **Comments** menu item.
  - Clicking on the cell location will navigate to the cell where the comment is located.
4. Click the **comment text** to manipulate the text of the comment.
5. Replace the sensitive information with the desired redaction text.

## Threaded Comments

Blackout supports placing redactions on threaded comments. Please note that there are limitations listed below:

### Spreadsheet Projects

- Threaded comments that are redacted via a rule do not also redact the author of the comment unless the matched text is the author's name.
- Document warnings are recorded when a rule matches a comment author's name. Blackout cannot redact the corresponding comment text.
- The "Replace comment text" setting will also replace the author of every comment with "Author Redacted."

### Manual Redactions

- Any manual redaction will redact every comment in the thread with the redacted text specified by the reviewer.
- The author will always be replaced with "Author Redacted."



**Note:** Reject the markup entry from the Markup Review menu item to remove the redaction.

## Redacting headers and footers

### What to know

- Headers and footers are displayed in a single list including additional details like Sheet Name, Location, Original Text, and Redacted Text.
- Headers and footers can appear in 3 different locations:
  - a. The default header and footer
  - b. Even page headers and footers
  - c. Odd page headers and footers
- The only way to identify headers and footers within Relativity is with Blackout.

### How to do it

1. In the lower left corner of the viewer, locate and open the **Blackout Markup Review Pane** using the  button.
2. Click the  button to open the sub-menu.
3. Click the **Headers and Footers** menu item.
4. Click **Redact** to redact a header or footer in the list.
5. Add the desired redaction text in the text editor.
6. The text on the document will be redacted but **will not be** reflected in the viewer. To view the redaction, the marked-up version of the document must be downloaded.

**Note:** Reject the markup entry from the Markup Review menu item to remove the redaction.



## Redacting objects

### What to know

Excel documents may contain a variety of objects from embedded objects to WordArt. Some of the most common types of objects include:

- WordArt
- SmartArt
- Embedded documents (Email, PowerPoint), images, equations, text boxes, and shapes
- Objects that are redacted **can only be redacted with the Black markup type**

## How to do it

1. In the lower left corner of the viewer, locate and open the **Blackout Markup Review Pane** using the  button.
2. Click the  button to open the sub-menu.
3. Click the **Objects** menu item.
4. Click on the sheet name to view the sheet where the object is located.
5. Click **Redact** to redact any object in the list.



## Redacting sheet names

### What to know

Sheet names have the following restrictions:

- Two sheets may not have the same name
- The name may not exceed 31 characters
- The name may not have the special characters: , / , \* , ? , : , [ , and ]
- The sheet name may not be word 'History'
- Blackout will prepend non-unique redactions with the sheet index (e.g., 2\_Redacted).

## How to do it

1. In the lower left corner of the viewer, locate and open the **Blackout Markup Review Pane** using the  button.
2. Click the  button to open the sub-menu.
3. Click the **Sheet Names** menu item.
4. Click **Redact** in the row of the sheet name to redact.
5. Type in the desired redaction text.
6. Click **Redact Sheet Name** to save. Refresh the viewer to see the newly redacted sheet name(s).

**Note:** Reject the markup entry from the Markup Review menu item to remove the redaction.

## Audits

### What to know

- Only certain manual markup actions are audited.

- Relativity does not have a concept of manual native markups; as such, these audits are created and stored in Blackout.

## How to do it

1. Log into Relativity as a System Administrator or a user who has access to the Blackout Audits tab.
2. Navigate to Blackout → Audits.
3. To get a quick view, page through the results.
4. To filter and search for specific results, click the Download Audit CSV button.

## Automated Excel projects

### Mass markups of Excel documents

#### What to know

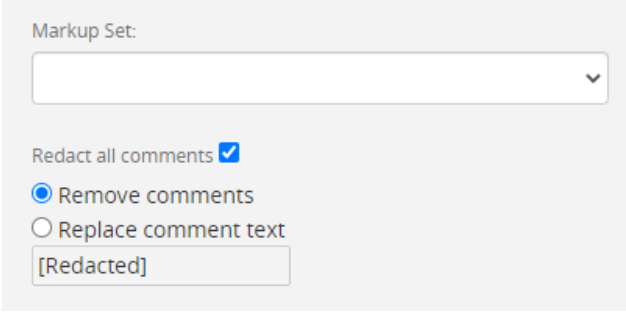
- Blackout provides the ability to redact and highlight Excel documents in bulk, utilizing terms, phrases, and regular expressions.
- Excel projects are a configurable way to target specific documents and locate content that must be marked up based on case needs.
- When setting the Word/Phrase rules for the project, either in the project itself or through a CSV template, Wildcards and dtSearch **are not** supported.
- If redact all headers and footers, redact all objects, or redact all comments is selected, no other rules are needed to run the project. Additionally, when these options are selected, every document in the saved search will be checked and redacted for the selected markup set.
- CSV Support
  - CSVs included in a saved search will be processed by Spreadsheet projects using this saved search.
  - Any rules with unsupported markup styles (e.g., white redactions, black redactions) will use the configured fallback text to place a text redaction on the CSV. The fallback text can be modified when creating or editing a project.
  - CSV files do not support native highlights. If a Blackout Spreadsheet Project rule has a markup type of highlight and hits on content within a CSV, the CSV will appear in the document warnings, and remain unmodified.

## How to do it

1. Log into Relativity as a System Administrator or a user who has access to the Blackout Projects tab.

2. Navigate to **Blackout → Projects**.
3. Click **Create New Project**.
4. Select **Spreadsheet**.
5. Fill out the project form using the details below.
6. Click **Create**.
  - A form will be displayed that is used to define how the project will function when running. The following fields make up the form:

Field	Description
<b>Project Name</b>	An identifier for the project making it easy to refer to or for others to find
<b>Saved Search</b>	The document source. All actions will be performed against these documents.
<b>Markup Set</b>	The markup set that the markups will be associated with.
<b>Redact all headers and footers</b>	<p>Selecting this option will replace all content in all headers and footers with the default redaction text within a document set. This option is run across all documents within the selected markup set.</p> <ul style="list-style-type: none"> <li>● This option is useful when redacting a set of documents with sensitive information in the header and footer that must be redacted on every document.</li> </ul> <p><b>Note:</b> <i>This option can be selected and run without the need to add any other rules to the project.</i></p>
<b>Redact all Excel objects</b>	<p>Selecting this option will place a black box redaction in front of all objects on the document set. This option is run across all documents within the selected markup set.</p> <p><b>Note:</b> <i>This option can be selected and run without the need to add any other rules to the project.</i></p>
<b>Redact all Comments</b>	Selecting this option will remove all comments in full or, if 'Replace comment text' is selected, will replace the comments with desired redaction text. This option is run across all documents within the selected markup set.

	 <p><b>Note:</b> This option can be selected and run without the need to add any other rules to the project.</p>
<b>Ignore certain rows or columns</b>	<p>When selecting this option, two additional fields are displayed where a comma-separated list of rows and columns can be identified that will remain unredacted throughout the project, even if there are matches or a rule that would include those locations.</p> <ul style="list-style-type: none"> <li>• This is the easiest way to ensure that headers of columns or rows remain visible.</li> </ul>
<b>Rules</b>	<p>The rules are what drives the project.</p> <ul style="list-style-type: none"> <li>• How they are configured will determine how the content will be located in a document.</li> <li>• There are three different kinds of rule groups--Redaction, Highlight, and Inverse.</li> <li>• Every time the fields are filled out for a rule group, another section will appear below it, allowing the creation of multiple rule groups. Each of these can be independently configured, targeting different sets of content.</li> </ul>
<b>Redact</b>	<p>Redaction rules will result in removing the content from the document and replacing it with a black, white, or text redaction.</p>
<b>Highlight</b>	<p>Highlight rules will result in changing the foreground color of the matched content with a selected color.</p>
<b>Inverse</b>	<p>Inverse rules are like redaction rules. They search the content from the document like a redaction rule; however, instead of redacting it, it will redact all content not matched by that rule.</p> <ul style="list-style-type: none"> <li>• When creating a project that will require inverse redactions, only a single inverse rule can be included.</li> </ul>
<b>Markup Reason</b>	<p>A simple message that can be associated with the markups made by the rule group. It can be reviewed using the Blackout reports.</p>



<b>Markup Scope</b>	<p>Defines the behavior of the project when placing a redaction, highlight, or inverse redaction.</p> <ul style="list-style-type: none"> <li>● Cell - will place the markup on the specific cell match, replacing all the content in the cell</li> <li>● Row - will place the markup on the entire row where a match is found</li> <li>● Column - will place the markup on the entire column where a match is found</li> <li>● Sheet - will redact the entire sheet where a match is found</li> <li>● Word - will replace only the exact matched text inside the cell where a match is found--not available in highlight and inverse rule groups</li> <li>● Character - Will place a markup on selected characters where a match is located <ul style="list-style-type: none"> <li>○ The Character scope option is not available for Inverse redaction types.</li> </ul> </li> </ul>
<b>Markup SubType</b>	<p>Specifies whether to place a Black, White, or Text markup.</p> <ul style="list-style-type: none"> <li>● If text is selected, custom text can be input for the markup. Otherwise, the default text markup language will be used.</li> <li>● If the highlight is selected, this option will be replaced with choices for yellow, blue, green, orange, pink, and purple.</li> </ul>
<b>Word/Phrase</b>	<p>'Word/Phrase' are the words, phrases, and text that will be marked up across the document set.</p> <ul style="list-style-type: none"> <li>● Multiple words or phrases can be added to a single rule group.</li> <li>● These rules are case insensitive.</li> </ul>
<b>Regex</b>	<p>Regular expressions can be used to identify important patterns like email addresses, social security numbers, credit card numbers, and any other content that may appear regularly throughout the document set that constitutes sensitive information.</p> <ul style="list-style-type: none"> <li>● Regular expressions require a name and an expression.</li> <li>● After saving the project, these regular expressions will be available to be selected by name on other projects within the same case.</li> <li>● Rules do not need to be added to create a project. Rules may be uploaded afterward, or, the project can be edited later.</li> <li>● Blackout uses the PCRE flavor of regular expression and runs with the global flag (/g), multi-line flag (/m), and case insensitive flag (/i) enabled by default. The case-insensitive flag can be modified inline by adding (?-i) to turn off and (?i) to enable.</li> </ul>

dtSearch	<p>dtSearch includes special characters and other operators that you can use to define search criteria.</p> <ul style="list-style-type: none"> <li>Noise words are not supported in Blackout Projects. Use the W/N operator for proximity matches in these instances.</li> <li>By default, all terms in a dtSearch rule will be redacted. The terms should be surrounded with (?&lt;redact&gt;{term}) to redact part of a dtSearch rule.</li> <li>To redact more than one term, multiple named groups must be defined.</li> <li>dtSearch rules automatically use cross-cell matching when identifying terms. If a rule has text that would span multiple cells, it will redact all cells containing parts of the matched term. Word/Phrase and regex rules continue to ignore cross-cell matches.</li> </ul>
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## Uploading rules from a CSV

### What to know

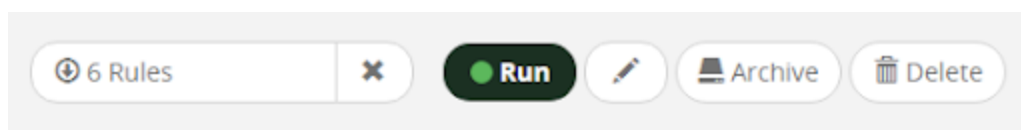
- After successfully creating the spreadsheet project, rules can be added via uploading a CSV template.
- Blackout can support up to 100,000 rules being created via CSV.
- Extra rules mean each doc takes a little longer to process as the Excel content needs to be checked for each rule.

The CSV template and explanation of the columns can be downloaded from the [Milyli Support Center](#).

### How to do it

- From the project view screen, click the **Upload rules CSV** button.
- Navigate to the completed CSV.
- Click the upload icon.

**Note:** If the CSV file is valid, the rules will be created, and the button will display how many rules are in the project.



# Running a Spreadsheet project

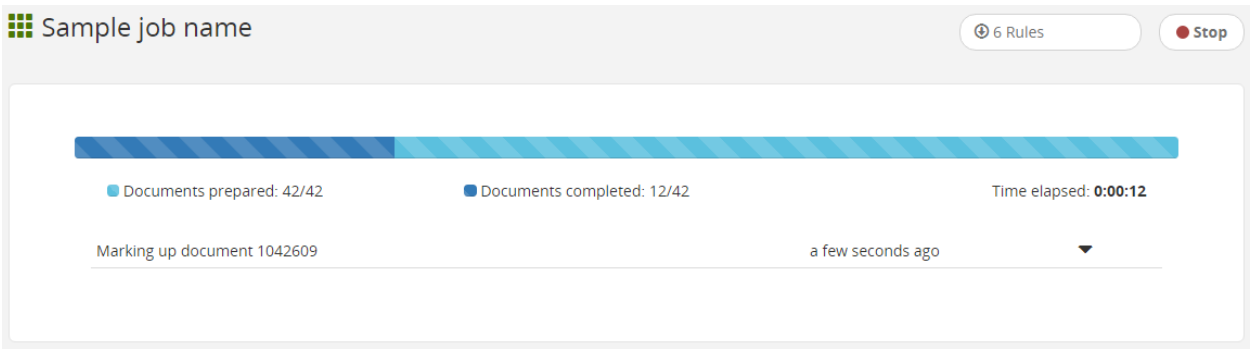
## What to know

- When a project is in a valid state to run, with a name, saved search, markup set, and rules, the status message of the project view screen will display that it is ready to run.

## How to do it

1. After creating the project, click the **Run** button.
2. Once the project begins running, the project will be queued and then start being processed by Blackout.
3. After the project completes, a results page displays information about the completed work and provides a launchpad for further quality review.

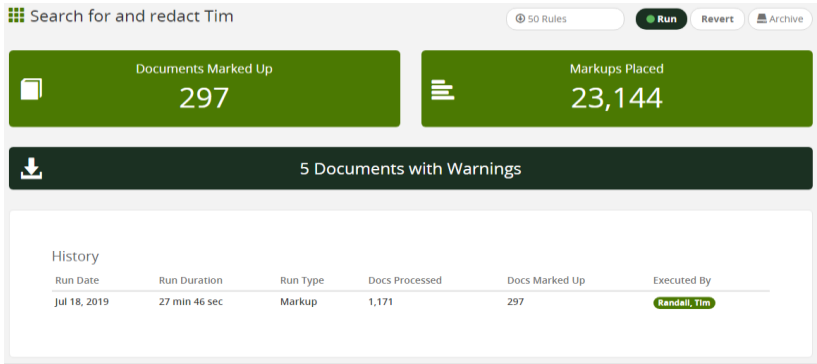
### While the project is running:



Status	Description
Project queued	The project enters the queued state letting the Blackout Worker Agents know to start working on the documents
Documents prepared	The number of documents that have been distributed to the system as tasks for markup review
Documents completed	The number of documents that have completed markup review which can result in markups being placed if there are rules matches
Progress bar	Displays the number of actions completed for preparation and review.

	<ul style="list-style-type: none"> <li>The light blue color represents document preparation, and the dark blue represents markup review.</li> </ul>
<b>Time elapsed</b>	The total time the project has processed
<b>Current activity</b>	<p>The current activities that the Blackout Worker Agents are performing which include preparation, reviewing, and marking up.</p> <ul style="list-style-type: none"> <li>The most recent action is shown at the top along with when it began. Clicking the down arrow will display the currently active tasks and when the task began.</li> </ul>
<b>Stop</b>	<p>Begins the stop operation which will cancel all unfinished work for the project.</p> <ul style="list-style-type: none"> <li>Work completed to that point will remain and can be reverted.</li> </ul>

When the project is completed:



Title	Description
<b>Documents marked up</b>	<p>The total number of documents that have had markups placed on them by Blackout using the rules from this run.</p> <ul style="list-style-type: none"> <li>Clicking this button will navigate to a saved search of all the documents that have been marked up.</li> </ul>
<b>Markups placed</b>	<p>The total number of markups that have been placed, both redaction and highlight, by Blackout using the rules from this run.</p> <ul style="list-style-type: none"> <li>Clicking this button will navigate to a saved search of all the documents that have been marked up.</li> </ul>

<b>Documents with warnings</b>	<p>The number of documents that encountered a non-project breaking warning.</p> <ul style="list-style-type: none"> <li>• Clicking this button will download a CSV of the document warnings that includes information about what happened and any error messages.</li> <li>• Providing this CSV to Milyli can greatly assist in diagnosing any issues that may have been encountered.</li> <li>• Typical reasons for warnings include password-protected documents without a password in the password bank, corrupt files, and Excel 95 and earlier Excels.</li> </ul>
<b>History</b>	<p>Projects are, by design, incremental. After the project has run, clicking the Run button again will queue the project up again and process any new documents in the document source. As a result, the history section will show the work that the project has performed and the results of said work.</p>

## Reverting a spreadsheet project

### What to know

- Occasionally the markups created by a spreadsheet project may need to be reverted. This need may arise when rules need to be modified or a case settles.

### How to do it

1. From the project view screen, click the **Revert** button.
2. A dialogue will appear; confirm reverting the project.
3. The project will be queued.
4. The Blackout Agents will pick it up and begin reverting the documents marked up by the project.
5. A progress bar will display how many documents have been reverted.

## Excel quality control

### The Blackout Markup Review Pane

### What to know

- After an Excel has been marked up with Blackout, it will tag the Blackout document yes/no field, **Blackout - Has Native Markups**.

- Documents can also be identified with the other Blackout fields and by a specific markup set. This is covered in further detail under the [Search](#) section.
- Creating a Relativity search using the field will result in a list of Excel documents that have markups.
- The Blackout Markup Review Pane will show all markups on the document, including those created by Blackout or placed manually.
- Markups shown within the Markup Review will only be those applicable to the selected markup set.

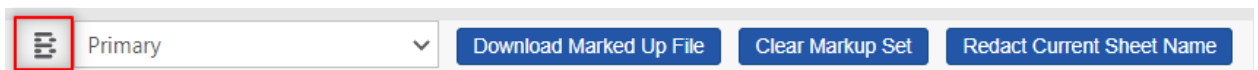
## What to know with failed markups


- The document cannot be modified further when a failed markup occurs. Failed markups must be resolved or deleted to continue QC or applying new markups to a document. A warning message will appear if trying to apply new markups when in a failed state.
- Markups cannot be approved or rejected if the document is in a failed state.
- Failed markups will display in the QC pane with a warning icon.
- Administrators will be alerted when a markup fails.
- Refer to the [Manual Excel troubleshooting](#) page for additional information regarding troubleshooting manual Excel errors.

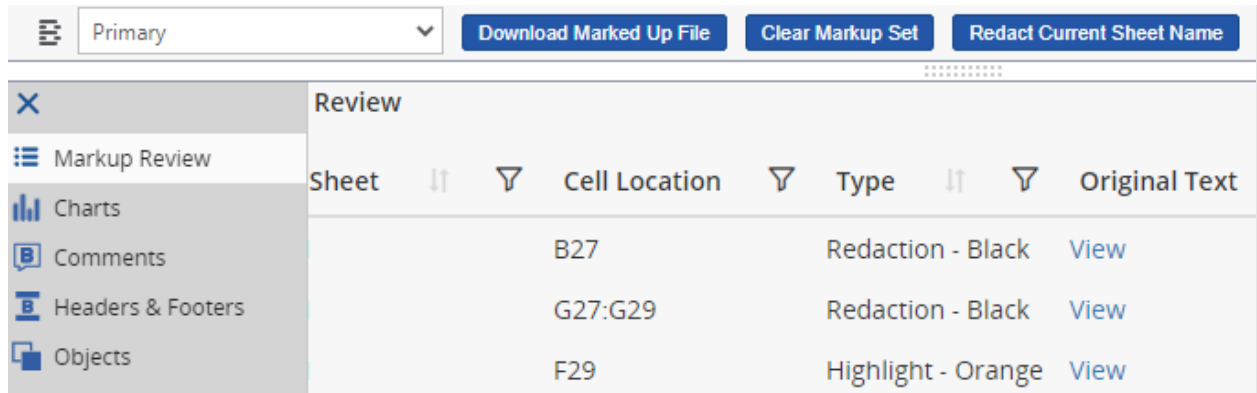
Failed Markups										
		Download Marked Up File		Clear Markup Set						
Status	Sheet	Cell Location	Type	Original Text						
▲ <input checked="" type="checkbox"/> <input type="checkbox"/>	1	C6	Comment	<a href="#">View</a>						
▲ <input checked="" type="checkbox"/> <input type="checkbox"/>	1		Chart - Full Chart							
▲ <input checked="" type="checkbox"/> <input type="checkbox"/>	1		Sheet Name	<a href="#">View</a>						
▲ <input checked="" type="checkbox"/> <input type="checkbox"/>	1	C4:C10	Redaction - Black	<a href="#">View</a>						

## How to do it

1. After creating the saved search or accessing the projects saved search from the "project complete" view, reviewing documents can be performed using a built-in Markup Review card located at the bottom left of the viewer.
2. From the bottom left of the viewer, click the **Blackout Markup Review** button.



- After opening the Blackout Markup Review Pane, ensure the native markup set that needs review has been selected.
- Click the  icon and choose 'Markup Review'.



The Markup Review section will now be opened allowing for quality control of the document.

#### Blackout Markup Review Pane descriptions:

Title	Description
<b>Approved</b>	<p>The approved column exists in three states. Not selected, approved, or rejected.</p> <ul style="list-style-type: none"> <li>• If neither is selected, then the markup will persist and not be impacted.</li> <li>• If approved is selected, then the markup will persist.</li> <li>• If approved is selected when the markup is in a rejected state, it will replace the markup on the document.</li> <li>• If rejected is selected, then the markup will be removed from the document.</li> </ul>
<b>Sheet</b>	Indicates the sheet name where a markup is located.
<b>Type</b>	Indicates the type of markup where a markup that was placed.
<b>Cell Location</b>	<p>Indicates the location that the markup exists, including cell, comment, header &amp; footer, chart, or object.</p> <ul style="list-style-type: none"> <li>• Clicking on the row will navigate the viewer to the cell location.</li> </ul>
<b>Original Text</b>	Clicking this link will display the information that exists under the markups.

<b>Matched Text</b>	Indicates the text that was matched causing the markup to be placed.
<b>Rule</b>	If a regular expression rule was used to place this markup, the name of that rule is displayed here.

## Filtering

The columns within the Markup Review section of the Blackout Markup Review Pane can be filtered allowing for more advanced quality control capabilities. Filtering could be especially useful if, for example, there was a need to accept/reject all a specific markup type or accept/reject all matches on specific matched text.

The columns below can be filtered:

- Approved
- Sheet index
- Cell location
- Markup Type
- Matched Text
- Rule

Additionally, sorting on the sheet, type, matched text, and rule columns is also possible.

## What to know

- Each page within the card can hold up to 50 records at a time
- When using the 'accept all' and 'reject all' buttons only the filtered entries will be affected
- The 'Sheet' column can only be filtered using the sheet index at this time
- The 'Type' column can only be filtered by the options in the dropdown (you cannot filter on highlight color for example)
- The Blackout Markup Review Pane remembers the state the user was in and will automatically display if the user had the card open and on the quality control panel.

## What else to consider

- **Approval is optional.** Markups do not require approval to produce or export the marked-up native. The approval process exists to provide a richer experience for review teams should they want to take advantage of it but is not required to complete the review.
- Blackout also includes another document field, **Blackout - Has Unresolved Markups**, which will select all documents where there is a markup that has not been marked as either approved or rejected.



# Manual Excel troubleshooting

## Email Notifications

- Configure an email to receive failure notifications from the Blackout Configuration tab.
- Blackout will send an email to the configured email when manual failures occur during Excel review from any workspace where Blackout is installed. We suggest configuring this with an IT or Lit Support distribution email.
- The Relativity SMTP settings must be properly configured for Blackout to send the email notification.

### Configuration

☒ Enable Advanced Agent Configuration Options

Manual Markup Error Notifications (separate multiple with semicolons)

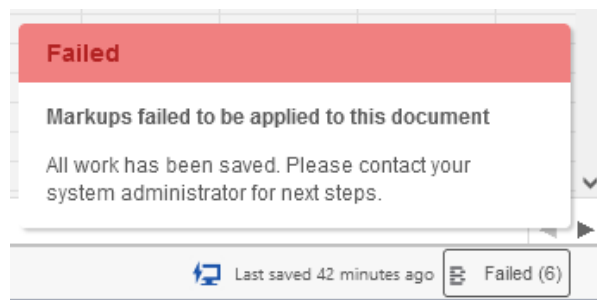
tim@milyli.com

Save

Cancel

## What reviewers see on failed markups

- Blackout displays the current document state in the bottom right corner of the viewer. If a markup fails to apply the user will see a Failed status message.



- A message will display to the user when applying new markups to a document in a failed state.

Error: Unable to place redactions on a document with failed redactions.













OK

- Reviewers will see a warning icon next to each failed markup in the Markup Review menu item of the Blackout Markup Review Pane.

Failed Markups

Download Marked Up File

Clear Markup Set

	Status	Sheet	Cell Location	Type	Original Text
	  	1	C6	Comment	<a href="#">View</a>
	  	1		Chart - Full Chart	
	  	1		Sheet Name	<a href="#">View</a>
	  	1	C4:C10	Redaction - Black	<a href="#">View</a>

- A markup failure message will display on the additional menu items in the Blackout Markup Review Pane that the document contains failed markups and is unable to be modified further until the failed markups are resolved.

Failed Markups

Download Marked Up File

Clear Markup Set

Last saved about 1 hour ago Failed (6)

Spreadsheet Comments

One or more markups have failed, preventing further markups on this document. Please see status message for more information.

Sheet	Cell	Original Comment	Redacted Comment
REDACTED	C6	Tim Randall: Jack's social security number is ...	Tim Randall: Jack's social security number is ...
REDACTED	K52	Tim Randall: Jack Doe's final project cost.	

## Manual Failures Tab

Blackout Projects

Blackout External Markups

Blackout Audits

Blackout Reports

Blackout Settings

Blackout Manual Failures

Blackout Analyze

BLACKOUT

A millyli PRODUCT

Download Errors

Retry Markups on 0 Documents

Delete Failed Markups on 0 Documents

<input type="checkbox"/>	Date	Artifact Id	Control Number	File Extension	Markup Set	Redacted By	Unplaced Markups	Exception Message	Actions
<input type="checkbox"/>	3/9/2023	1124860	Manual Failure - Pw...	.xlsx	Primary	Brouillette, Trent	1	An exception occurred ...	<a href="#">Retry</a>   <a href="#">Delete</a>
<input type="checkbox"/>	3/9/2023	1124861	Manual Failure - Pw...	.xlsx	Primary	Brouillette, Trent	1	An exception occurred ...	<a href="#">Retry</a>   <a href="#">Delete</a>

1050100All

Page 1 of 1 (2 items)

1

### Retry or delete failed markups

- Manual failures tab will display a list of all documents with at least one failed markup.
- Click the **Retry** button to try re-applying the failed markups without requiring the reviewer to re-do that work.
- Click the checkbox next to each document record and click the **Retry Markups on Documents** to retry multiple documents at once.

<input type="button" value="Retry Markups on 1 Document"/>		<input type="button" value="Delete Failed Markups on 1 Document"/>							
<input type="checkbox"/>	Date	Artifact Id	Control Number	File Extension	Markup Set	Redacted By	Unplaced Markups	Exception Message	Actions
<input checked="" type="checkbox"/>	3/9/2023	1124860	Manual Failure - Pw...	.xlsx	Primary	Brouillette, Trent	1	An exception occurred ...	<a href="#">Retry</a>   <a href="#">Delete</a>
<input type="checkbox"/>	3/9/2023	1124861	Manual Failure - Pw...	.xlsx	Primary	Brouillette, Trent	1	An exception occurred ...	<a href="#">Retry</a>   <a href="#">Delete</a>
10   50   100   All		Page 1 of 1 (2 items)							1

- Click **Delete** button to delete the failed markups. This is useful to allow the reviewer to continue applying other markups on the document while diagnosing the cause of the failed markup.
- Click the checkbox next to each document record and then click **Delete Failed Markups** on Document button to delete the failed markups on multiple documents at once.
- Markup failures are specific to each markup set per document.
- Retry can be used even with resolutions such as replacing the native or if a Blackout update is required.

## Download errors

- Use the **Download Errors** button to export a list of each failed Manual Excel markup.
- The Markup Id with the earliest timestamp should identify the main markup failure to address. Failures after the earliest timestamp are the additional markups submitted by the reviewer after the initial markup failure occurred.
- Refer to the Markup Type column to determine what type of redactions caused the failure. ie: Sheet Name, Object, or Chart.
- Send this export to Milyli Support. Use this instead of exporting the Blackout System Log unless requested from the support team.

Markup Id	Timestamp	Name	Artifact Id	Control Number	File Extension	Markup Set Id	Markup Type	Redacted By	Exception
5338	3/9/2023 16:24	1124860_1034197	1124860	Manual Failure - Pwd Protected	.xlsx	1034197	DocumentPreparation	Brouillette, Trent	Hangfire.
5339	3/9/2023 16:24	1124861_1034197	1124861	Manual Failure - Pwd Protected Doc 2	.xlsx	1034197	DocumentPreparation	Brouillette, Trent	Hangfire.

## Migrating Markups

Migrate Markups Projects are a powerful tool available at the workspace level that helps Case Administrators ensure markup consistency between documents.

## Technical Considerations

- Migrate Markups Projects use high-resource workers for execution.
- Execution takes place within the resource pool of the source workspace.
- New files are created for redacted documents in the destination workspace, preserving the source redacted files.

- **Note:** Blackout 5.1 enables the ability to perform migrations between documents within the same workspace.

Migrate Markups Fields			
Source		Destination	
<b>Workspace</b>	The workspace containing the original documents and markups	<b>Workspace</b>	The workspace where the migrated markups will be placed
<b>Saved Search</b>	The set of source documents that you want to match	<b>Saved Search (Optional)</b>	Used to limit migrated markups to only duplicate documents that appear in the destination saved search
<b>Markup Set</b>	The markup set you want to migrate from the source workspace	<b>Markup Set</b>	The markup set in the destination workspace the markups will be applied to
<b>Document Identifier Field</b>	The field used to match documents in the source workspace	<b>Document Identifier Field</b>	The field used to match documents in the destination workspace

## Creating and Running a Migrate Markups Project within the same workspace to children documents

### PROPAGATING TO CHILDREN



A migrate markup project can be used to copy markups to child documents within the same workspace to save time and reuse work product from past redactions. To do so follow the steps below:

1. Navigate to **Blackout | Projects**
2. Click on **Create New Project**
3. Select **Migrate Markups** from the available options

4. Choose the saved search, markup set, and document identifier you wish to match on in your source. Then choose the same workspace as your current one from the dropdown for destination, the markup set you wish to apply the markups to in the destination and the document identifier you wish to match on.
5. Click **Create**
6. Then click **Run** to execute the project

Once the project is complete you will be able to review the results and see the number of markups placed as well as any warnings. Please see our section on Reviewing Migration Results below for more details.

## Reviewing Migration Results

The results page provides an overview of the Migrate Markups Project's outcome.

Run Revert Copy Archive

Cooper's Workspace Documents Marked Up
4

Markups Placed
19

3 Documents with Warnings

History

Run Date	Run Duration	Run Type	Source Docs Processed	Destination Docs Marked Up	Executed By
Aug 3, 2023	24 sec	Migrate	7	4	Brouillette, Trent

- **[Destination Workspace] Documents Marked Up:** The count of destination workspace documents with markups migrated by the project. Click this area to navigate to the destination workspace to a List Search containing the successfully migrated documents.
- **Markups Placed:** The total redactions placed in the destination workspace across all project runs.
- **Document Warnings:** The count of document pairs requiring review from the most recent project run. Download a CSV with document IDs and issue descriptions.
- **Source Docs Processed:** Total number of documents in the source workspace's saved search during the run.

- **Destination Docs Marked Up:** Number of destination workspace documents marked up during the run.

## Rerunning a Migration Project

Rerunning a completed Migrate Markups Project will do the following:

- Previously failed documents will be retried.
- New documents added to the Saved Search not previously run will be processed.
- Skipped documents are not reprocessed. They will remain flagged as skipped on re-run but you will need to revert the project and run again to reprocess skipped documents.
- Successfully processed documents with new markups since the last execution are not reprocessed.

## Document Warnings

Blackout Migrate Markups Project identify specific conditions requiring administrator review:

- **Document Skipped**
  - Source Document has no markups.
  - Source Document maps to 0 destination docs.
- **Documents with Failures**
  - Destination document type differs from source document type.
  - Destination document is locked for production.
  - Spreadsheet markups fail to apply to the destination document.
  - Image count differs between source and destination documents.
  - Source document contains an External Markup file and the destination document has existing markups.

## Reverting a Migrate Markups Project

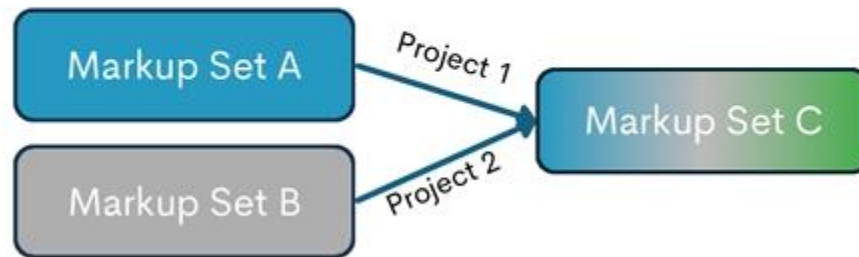
Clicking the Revert Button after a Migrate Markups Project has been run will remove all markups placed by the project in the destination workspace, leaving markups in the source workspace intact.

## Migrate Markups to Merge Markup Sets

When multiple markup sets are used during the review process, a Migrate Markups project can be used to combine those markup sets into a single markup set to make production easier. Below, we will go through the steps and various scenarios that cover this workflow.

Creating and Running a Migrate Markups Project to merge into a new markup set

### Scenario 1: Merge Into a New Markup Set



A migrate markup project can be used to merge markup sets into a new set for production. In the above example, we use two markup sets, A and B, and then run two projects to merge them into a new markup set used for production, markup set C. To do this follow, the steps below.

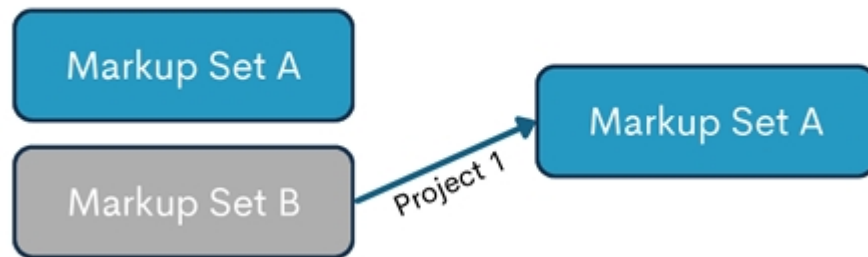
1. Navigate to **Blackout | Projects**
2. Click on **Create New Project**
3. Select **Migrate Markups** from the available options
4. Choose the saved search, markup set, and document identifier you wish to match on in your source. Then in the destination fields choose the same workspace as your current one, the markup set you wish to use for production, and the same document identifier as your source.
5. Click **Create**
6. Then click **Run** to execute the project

Repeat the above steps again for the second project except replace the Source Markup set with the second markup set you wish to merge into the production markup set.

Once the projects are completed, you will be able to review the results and see the number of markups placed as well as any warnings. Please see our section on Reviewing Migration Results for more details.

Creating and Running a Migrate Markups Project to merge into an existing markup set

## Scenario 2: Merge Into an Existing Markup Set



A migrate markup project can be used to merge markups from a mark up set to an existing markup set. To do so follow the steps below.

1. Navigate to **Blackout | Projects**
2. Click on **Create New Project**
3. Select **Migrate Markups** from the available options
4. Choose the saved search, markup set, and document identifier you wish to match on in your source. Then, choose the same workspace as your current one from the dropdown for destination, the markup set you wish to apply the markups to in the destination and the document identifier you wish to match on.
5. Click **Create**
6. Then click **Run** to execute the project

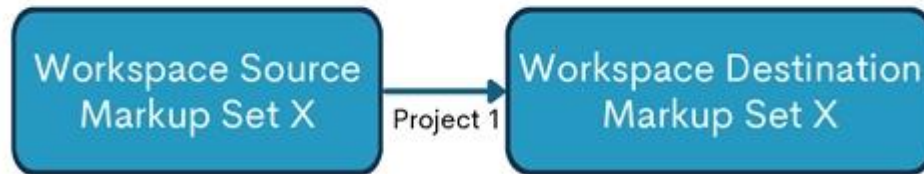
Once the project is complete, you will be able to review the results and see the number of markups placed as well as any warnings. Please see our section on Reviewing Migration Results for more details.



## Migrating Markups To Another Workspace

Creating and Running a Migrate Markups Project To another workspace

### MIGRATING TO ANOTHER WORKSPACE



A migrate markup project can be used to move markups to duplicate documents in another workspace on the same environment to save time and reuse work product from past redactions. To do so, follow the steps below:

1. Navigate to Blackout | Projects
2. Click on Create New Project
3. Select Migrate Markups from the available options
4. Choose the saved search, markup set, and Document identifier you wish to match on in your source Then choose the destination workspace you wish to copy to, the markup set you wish to apply the markups to in the destination, and the Document identifier you wish to match on.
5. Click Create
6. Then click Run to execute the project

Once the project is complete you will be able to review the results and see the number of markups placed as well as any warnings. Please see our section on Reviewing Migration Results for more details.

# Converting Spreadsheet Markups

## The Convert Spreadsheet Markups mass action

### What to know

- The **Convert Spreadsheet Markups** mass action can be used to convert markups on Excel documents from one markup type to another.
- Redactions can be converted to highlights or vice versa.
- The source of the markup can be either manual placement or automated projects.
- The Convert Spreadsheet Markups mass action **will only work on Excel documents**.
- Markups in a failed state will still be converted. Retrying failed markups after converting will be applied as the new, converted markup type.
- Character scoped markups cannot be converted to other markup types.

### How to do it

- In this example, a document has been highlighted with orange highlights and will be converted to black redactions.

	A	B	C	D	E	F	G
1		Stuff	Things				
2		1	44				
3		2	42				
4		3	40				
5		4	38				
6		5	36				
7		6	34			Sum of Stuff	Sum of Things
8		7	32			351	510

1. From a document list, select the document or documents that the orange highlights should be converted to redactions.
2. Select the Convert Spreadsheet Markups mass action.
3. A mass action form will display requesting information about where and how to perform the operation.

**Convert Markups On 1 Document.**

Markup Set:

Primary

Markup Style to Convert From

Markup Type:

Highlight

Markup Subtype:

Orange

Markup Style to Convert To

Markup Type:

Redaction

Markup Subtype:

Black

4. Submit the form after selecting the markup types that should be replaced.
  - A message will be displayed, and the run length will depend on the number of documents that are selected for conversion.
  - After successfully running, the document cache will be updated automatically, and the modified document(s) will be displayed.

	A	B	C	D	E	F	G
1							
2			1	44			
3			2	42			
4			3	40			
5			4	38			
6			5	36			
7			6	34			
8			7	32		351	510

## Quality control and re-running projects

### What else to consider

The **Convert Spreadsheet Markups** mass action changes the type of the markup in the Blackout database as well as refreshes the document cache with Relativity to ensure the file is properly modified. As a result, **some Blackout behaviors will be modified as well.**

- For Blackout quality control, accepting and rejecting the modified values will **remove and reapply** the converted markup types.
- If reverting a spreadsheet project and re-running it, the style from the project's rules will be reapplied. For example, if a project placed orange highlights, if that project is reverted, running it again will place orange highlights again.

## Redacting PDFs

### Manual PDF markups

Blackout adds functionality for manually redacting PDFs in the Relativity viewer. The Relativity viewer is extended with new tools for drawing redactions, removing attachments, and eliminating annotations. The redaction experience has been loosely tailored to be similar to redacting images in Relativity through a familiar toolset and workflow.

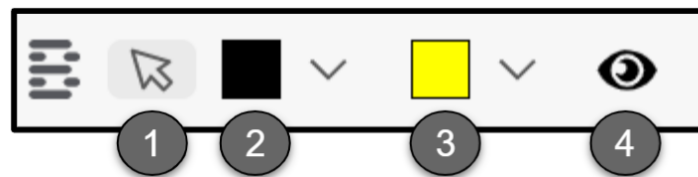
### Before you begin

- If you are a first-time reviewer or new to redacting documents manually with blackout, make sure that you have been granted permissions to do so. Look at our [PDF permissions documentation](#) to learn more.

- Marking up PDFs is like marking up images within Relativity. Redactions are not immediately burned into the PDF when drawn on the viewer. To 'burn-in' the markups that have been placed a [Production Preparation](#) project is required. The PDF can be sampled using the *Download Marked Up Document* button on the toolbar at the bottom of the viewer.
- Two new buttons, located at the top of the viewer, are introduced for native PDF markups. Locate the Blackout 'B' icon to get started.

## The Blackout toolbar

The Blackout B icon represents where the tools for marking up PDFs will be located. Within this toolbar you will see the following options:





1. **Selection Mode:** allows for selecting, moving, and resizing of markups.
  2. **Redaction Mode:** enables redaction and allows the selection of redaction styles.
  3. **Highlight Mode:** enables highlight mode and allows the selection of highlight colors.
  4. **Blackout Visibility Toggle:** toggles between visibility modes.
- The active selection on the toolbar is indicated by a gray filled outline around the selected mode.
  - The active redaction or highlight style is indicated by bold text within the selected mode.

## The Blackout visibility toggle

Clicking the visibility toggle will cycle through multiple stages of visibility for reviewing the content under markups.

The following icons represent each visibility state:

Icon	Description
	All markups are visible
	All markups are transparent



All markups are no longer visible

## Redactions and highlights

### What to know

- Users with permissions can use the Redaction and Highlight toolbar menus to markup documents directly without taking the file out of Relativity.
- Markups are drawn without writing immediately to the PDF to allow for quick review and navigation.
- Blackout, PDF specific, audits are written for placing and deleting (reverting) markups and are available in the Audit sub-tab of the Blackout tab. Audits are not available for moving or resizing markups.

### Black and white redactions

1. Navigate to the PDF document in the Relativity viewer
2. **Switch the markup set** to the required one for the case
3. **Click the redaction mode** button and select your desired redaction style. A drop down will be displayed showing Black, White, or Text options. Black is selected by default.
  - **Black:** creates a solid black box, like using a black marker.
  - **White:** creates a solid white box with a gray border for tracking. The gray border won't be on the burned-in document.
  - **Text:** creates a white redaction box with horizontally and vertically centered black text.
4. **Click and drag** over the area where the redaction will be placed.

### Text redactions

1. Navigate to the PDF document in the Relativity viewer
2. **Switch the markup set** to the required one for the case
3. **Click the redaction mode** button at the top of the viewer and select text.
4. **Click and drag** over the area where the text redaction will be placed.

#### *Redaction text*

The default text of the text redaction is based on the value of the markup set. Text redactions on PDF behave exactly as they do on Relativity images.

Case admins can modify the default value by following the steps below.

1. Navigate to the **Case Admin** tab.
2. Select **Markup Sets**.
3. Click the **Edit** button to edit the markup set information.
4. Change the **Redaction Text field** to the desired default text.
5. Click **Save**.

Text redactions can also be changed directly on the document on a redaction-by-redaction basis. After changing the text, subsequent text redactions will automatically use the newly input value. The default value will remain available in the right-click menu to go back to at any time.

1. Navigate to and select the text redaction that will be changed.
2. **Right-click** the redaction that will be edited.
3. A menu will be displayed. Select **Edit**.
4. A new menu will be displayed. Enter the desired text for the markup.
5. Click **Save**.
6. The text will be modified to match the input text.

## Highlights

1. **Navigate** to the PDF document in the Relativity viewer
2. **Switch the Native Markup Set** to the required one for the case
3. **Click the highlight mode button** and choose the desired highlight color.
4. Click and drag over the area where the highlight will be placed.

## Manually removing markups

### How to do it

Removing markups can be accomplished through two quickly accessible means. Depending on the source of the markup these options will have slightly different behaviors. If the markup was placed manually, both operations below will completely remove the markup. If the markup was placed with an automated project, the delete operation below will be the same as rejecting the markup from the quality control interface.

1. **Right-clicking**
  1. On the document, find the markup that will be removed.
  2. Left-click to select the markup.
  3. Right-click the markup.
  4. Select the Delete Markup button.
  5. A message will appear to confirm the deletion. Select, Delete Markup to confirm.

6. After a brief delay, the markup will be removed.

## 2. The delete key shortcut

1. On the document, find the markup that will be removed.
2. Click on the markup to select it.
3. Press the delete key on your keyboard.
4. A message will appear to confirm the deletion. Select, Delete Markup to confirm.
5. After a brief delay, the markup will be removed.

# Automated PDF markups

## Before you begin

### How it works

Blackout provides the ability to scan many PDFs for sensitive information based on a provided set of words, terms, phrases, or regular expressions. Users will select a saved search, a markup set, input or upload rules, and Blackout will scan all the searchable text content in each PDF.

Any area of the PDF that is composed of text searchable blocks or properties will be scanned and subsequently redacted or highlighted based on the configured rules. This includes page text, headers, footers, text-based annotations, form data, field properties and more.

### What else to consider

- Blackout can only automatically mark-up text searchable blocks in a PDF. It will not scan images for text in automated projects.
- Images and multimedia content can be manually redacted during QC. To learn more, see the [manual markup documentation](#).
- Headers, footers, and form data are a part of a PDFs text body and do not require additional options to be scanned









## Creating a PDF project

### Getting started

- Separate out the PDFs to be redacted into their own saved search
- Ensure that the required markup set for the case has been created in Relativity
- Validate that you have access to the Blackout tab for the case

- There is a wide range of workflows that can be utilized to accomplish different markup goals. However, we will focus on the basic tooling and how to create and run the project for this guide.
- Rules are not required to create a project

Which project type would you like to create? Cancel

 <b>Image Markup</b> Redact and highlight images in bulk utilizing terms, phrases, and regular expressions.	 <b>Spreadsheet Markup</b> Redact and highlight spreadsheet natives in bulk utilizing terms, phrases, and regular expressions.	 <b>PDF Markup</b> Redact and highlight spreadsheet natives in bulk utilizing terms, phrases, and regular expressions.	 <b>Analyze</b> Analyze a set of rules against extracted text and provide information on document matches.
 <b>Image Template</b> Duplicate image markups from a template document to other documents.	 <b>Spreadsheet Propagation</b> Copy native spreadsheet redactions to other documents.	 <b>Production Preparation</b> Burn in Blackout native redactions for production.	 <b>Migrate Markups</b> Migrate all redactions on selected documents to another workspace.

## PDF project setup

1. Navigate to **Blackout** → **Projects**
2. Click **Create New Project**
3. Select **PDF**
4. Fill out the project form using the details below
5. Click **Create**
6. A form will be displayed that is used to define how the project will run:

Field	Description
<b>Project Name</b>	An identifier for the project, making it easy to refer to or for others to find.
<b>Saved Search</b>	The document source. This should comprise the documents that will be scanned for sensitive information.
<b>Markup Set</b>	The markup set that markups created by the project will be associated with.
<b>Redact All Attachments</b>	Checking this option will result in all attachments from being removed from each document in the set.



<b>Rules</b>	<p>Rules are what instruct a project in which information should be marked up. How they are configured will provide instruction to the project on how to place markups on matched content. There are two different kinds of rules, redaction, and highlight.</p> <p>Rules are separated by groups where each group will contain a set of instructions for the specified terms, phrases, or regular expression. A project can be composed of multiple groups, each with different instructions. Every time the fields are filled out for a rule group, another section will appear below it.</p> <p>Rules are not required to create the project. This is especially useful for uploading rules via CSV.</p>
<b>Redact</b>	Redaction rules remove the underlying content from the document and place a black, white, or text redaction where the removed content was.
<b>Highlight</b>	Highlight rules create a rectangle in the foreground of the matched content with the selected color.
<b>Markup Reason</b>	A simple message that can be associated with the markups made by the rule group. It can be reviewed using the Blackout reports.
<b>Markup Scope</b>	<p>Defines the markup behavior when the project matches a rule.</p> <ul style="list-style-type: none"> <li>● <b>Character</b> - Places the markup on the exact match even if the match is a part of a word. For example, the rule <code>tim.randall</code> will match the name part of <code>tim.randall@milyli.com</code> and only redact the match leaving <code>@milyli.com</code> unredacted.</li> <li>● <b>Word</b> - Places the markup on the entire word, even if only part of the word is matched. In the previous example, the entire email address would be redacted given the rule <code>tim.randall</code>.</li> <li>● <b>Line</b> - Create a redaction that spans the entire horizontal line for the given match.</li> </ul>
<b>Markup Subtype</b>	The style of markup to place whether to place. For redactions, the available options are black, white, or text markup. For highlights, the options are yellow, blue, green, orange, pink, and purple.

<b>Word/Phrase</b>	<p>'Word/Phrase' are the words, phrases, and text that will be marked up across the document set.</p> <ul style="list-style-type: none"> <li>Multiple words or phrases can be added to a single rule group.</li> <li>These rules are case insensitive.</li> </ul> <p><b>(dtSearch and Wildcards are not supported)</b></p>
<b>Regex</b>	<p>Regular expressions can be used to identify important patterns like email addresses, social security numbers, credit card numbers, and any other content that may appear in a regular pattern throughout the document set. Regular expressions require a name and the expression to be valid. After saving the project, these regular expressions will be available to be selected by name on other projects within the same case.</p>
<b>dtSearch</b>	<p>dtSearch includes special characters and other operators that you can use to define search criteria.</p> <ul style="list-style-type: none"> <li>Noise words are not supported in Blackout Projects. Use the W/N operator for proximity matches in these instances.</li> <li>By default, all terms in a dtSearch rule will be redacted. The terms should be surrounded with (?&lt;redact&gt;{term}) to redact part of a dtSearch rule.</li> <li>To redact more than one term, multiple named groups must be defined.</li> </ul>

## Uploading rules from a CSV

After successfully creating the PDF project, rules can be created by uploading a filled-out CSV template.

### What to know

- Only a valid project name, saved search, and markup set are required to create a project before uploading rules via CSV
- Blackout can support up to 100,000 rules via CSV.
- More rules mean more processing time so take this into when preparing the project
- Rules loaded through CSV behave exactly as rules input on the create project screen
- Rules loaded through CSV do not appear in the rules list due to the number of rules supported

- To review CSV rules, the CSV that is loaded into the project can be downloaded and reviewed

*The CSV template and explanation of the columns can be viewed and downloaded from the [Milyli Support Center](#).*

## How to do it

1. From the project view screen, click the Upload rules CSV button.
2. Navigate to the completed CSV.
3. Click the upload icon.
4. If the CSV file is valid, the rules will be created, and the button will display how many rules have been uploaded.

## Running a PDF project

### What to know

- When a project is in a valid state to run, with a name, saved search, markup set, and rules, the status message of the project view screen will display that it is ready to run.
- PDF projects share the first come first serve queue with other Blackout projects
- After clicking the run button, the project will be queued immediately
- If there are other projects in queue, they will be completed before the project starts running
- Once the project is next, it will begin processing
- While the project is running, PDFs will be distributed to high resource workers across all available Blackout agents that have high resource enabled
- Similar to Excel projects, the PDF project will keep track of any document that it cannot successfully redact and will provide a report after it completes the project

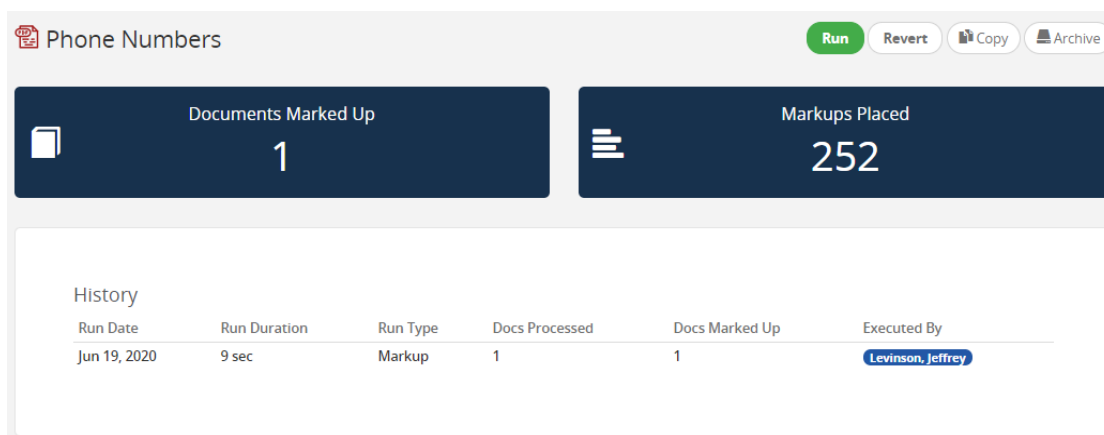
### While the project is running

While the project is running, information about the project will be displayed.

Message	Description
<b>Documents prepared</b>	The number of documents that have been successfully added to the system for markup review
<b>Documents completed</b>	The number of documents that have been marked up successfully

<b>Progress bar</b>	<p>Displays the number of actions completed for preparation and review.</p> <ul style="list-style-type: none"> <li>The light blue color represents document preparation and the dark blue represents markup review.</li> </ul>
<b>Time elapsed</b>	The total time the project has processed
<b>Current activity</b>	<p>The current activities that the Blackout Worker Agents are performing which include preparation, reviewing, and marking up.</p> <ul style="list-style-type: none"> <li>The most recent action is shown at the top along with when it began.</li> <li>Clicking the down arrow will display the currently active tasks and when the task began.</li> </ul>
<b>Stop</b>	<p>Begins the stop operation, which will cancel all unfinished work for the project.</p> <ul style="list-style-type: none"> <li>Work completed to that point will remain and can be reverted.</li> </ul>

After the project completes, a results page displays information about the completed work and provides a launchpad for further quality review.



## Project Results

When the project completes, information about the most recent and previous project runs will be available. The following table provides an overview of the different data.

Message	Description
<b>Documents marked up</b>	The total number of documents that have had markups placed on them by Blackout using the rules from this run.

	<ul style="list-style-type: none"> <li>Clicking this button will navigate to a saved search of all of the documents that have been marked up.</li> </ul>
<b>Markups placed</b>	<p>The total number of markups that have been placed, both redaction and highlight, by Blackout using the rules from this run.</p> <ul style="list-style-type: none"> <li>Clicking this button will navigate to a saved search of all of the documents that have been marked up.</li> </ul>
<b>Documents with warnings</b>	<p>The number of documents that encounter a non-project breaking warning.</p> <ul style="list-style-type: none"> <li>Clicking this button will download a CSV of the document warnings that includes information about what happened and any error messages.</li> <li>Providing this CSV to Milyli will assist in diagnosing any issues that may have been encountered.</li> </ul>
<b>History</b>	<ul style="list-style-type: none"> <li>Projects are incremental.</li> <li>After the project has run, clicking the Run button again will queue the project up again and process any new documents in the saved search only. <ul style="list-style-type: none"> <li>As a result, the history section will show the work that the project has performed and its results.</li> </ul> </li> </ul>

## Reverting a PDF project

### What to know

- Occasionally the markups created by a PDF project may need to be reverted.
- This need may arise when rules need to be modified or a case settles.

### Reverting the project

- From the project view screen, click the **Revert** button
- A dialogue will appear; confirm reverting the project
- The project will be queued
- The Blackout Agents will pick it up and begin reverting the documents marked up by the project
- A progress bar will display how many documents have been reverted

# PDF quality control

## Before you begin

PDF quality control is facilitated through the Blackout Markup Review Pane at the bottom of the page.

- The reviewer must be on a markup set other than 'None' to utilize the Blackout Markup Review Pane
- The Blackout Markup Review Pane is also used for redacting annotations and attachments on PDFs
  - To learn more, see the [annotations](#) and [attachments](#) sections

## Using the Blackout Markup Review Pane

- The **Blackout Markup Review Pane** will show all markups on the document, including those created through automation or manual markup
- All markups will be displayed regardless of active markup set, like Relativity image markups
- The selected menu option will be saved for the current user
- There are three tools available through the Markup Review Card
  - This section details the Markup Review Card

## Reviewing quality control entries

1. Open the **Blackout Markup Review Pane**
2. Choose the **Markup Review** sub menu
3. All records will be displayed for each QC entry
4. The following table defines each column:

Column Name	Description
Source	This column will display either a Blackout B icon or a pencil icon. The Blackout B icon indicates a markup created via automation. The pencil icon indicates a markup created via manual markup.
Approved	Provides approval and rejection action items.
Page	The page number the markup was placed on.
Markup Type	Indicates if the markup was a redaction or a highlight.

<b>Match Text</b>	For each automated project, the specific text that was matched by the provided rule.
<b>Rule</b>	The rule that resulted in the match from the Blackout PDF project.

Each column can be filtered by clicking on the filter button to the right of the column header.

## Accepting/Rejecting markups

To quickly review quality control entries, clicking on a row will navigate to and select the corresponding markup. The selected markup will be indicated in the document viewer while the row in the quality control entry will be highlighted.

- If a markup is accepted from an unset state, the record is simply updated to indicate it was accepted
- If a markup is rejected from either an unset or accepted state, the markup will be removed from the viewer
- If a Blackout markup is manually edited before it is rejected or deleted, and is subsequently accepted, the markup will return to the state it was in before it was manually edited.
- The Accept All and Reject All buttons will always reflect the filtered quality control entries providing an effective way of approving or rejecting subsets of entries
- When a record is accepted or rejected it is flagged as resolved
  - When all records for a document are flagged as resolved, the document field Has Unresolved Markups will be coded as false

## Has unresolved markups document field


- Blackout adds a **“Blackout Has Unresolved Markups”** field to the document object upon adding Blackout to the workspace
- A document is only tagged as true when marked up via an automated PDF project
- This field is useful in determining which documents have been run through a Blackout PDF project but may not have been reviewed yet

## Redacting annotations

### Annotation redactions

#### What to know

- Annotations inside of PDFs are split into 2 groups: **markup annotations** and **non-markup annotations**.

- **Markup annotations** are primarily used to mark up the content of a PDF document.
- **Non-markup annotations** are used for other purposes, including interactive forms and multimedia.
- There are 2 primary types of annotations, **Markup** and **Non-Markup**, as well as various subtypes.
- Many annotation types are defined as markup annotations because they are used primarily to markup PDF documents. These annotations have text that appears as part of the annotation and may be displayed in other ways by a viewer application, such as in a comments pane.
- Each column within the Annotation Redaction Tool can be filtered using the  button.

## Markup annotations

Markup annotations can be separated into 3 main types:

- 1. Free text annotations:** Text is displayed directly on the page.
- 2. Pop-up associated markup annotations:** these include Text, Line, Square, Circle, Highlight, Underline, Strikeout, RubberStamp, Caret, Ink, and File Attachments.
  - Text Markup annotations are a subtype of pop-up associated annotations and contain one or more words in a document upon which the pop-up is associated with. They also include markup annotations such as Underline, Strikeout, Caret, Squiggly, etc.
  - Not all pop-up associated annotations are text markup annotations.
- 3. Sounds annotations:** do not have a pop-up window but may have associated text specified by the Contents entry.

### Types of markup annotations

Caret	CommonFigure	FileAttachment	FreeText	Ink	Line	Poly
Sound	Stamp	Text	Highlight	Squiggly	Strikeout	Underline

## Non-markup annotations

### What to know






- Pop-up annotations typically do not appear by themselves and have a parent property which is associated with a markup annotation.
- If no parent association is defined for Popup annotation, the viewer application may use the Popup's Contents as the text for the annotation.



## Types of non-markup annotations

Link	Movie	PDF3D
Popup	Redaction	RichMedia
Screen	Watermark	Widget

## How to do it

1. Open the **Blackout Markup Review Pane** by clicking the  button at the bottom left of the viewer.
2. Choose the **Annotation Redaction Tool** by clicking the  button.
3. Navigate to the annotation that will be redacted. Then, click the  button. After a brief delay, the annotation will be redacted and the 'Redact' button will be grayed out and replaced with the  button.
  - If the redaction needs to be undone, the  button can be selected. This will undo the redaction of the selected annotation.

## What else to consider

### Redacting annotations manually

- Annotations visible on the document (typically only markup annotations) can be redacted by placing a manual redaction on top of them.
- Any redaction which overlaps with an annotation will remove it completely. The ability to partially remove an annotation is not available.


### PDF document review pane

- All the annotations are also listed in the pane below the document, known as the Blackout Document Review Card.
- From here, you will be able to filter on content, apply redactions to each annotation individually, or redact them all using the "redact all" button within that pane.
- Annotations that are redacted will be removed completely from the document. There is currently no ability to remove only selected text.




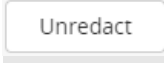
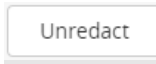
- Even though the annotation will be marked as redacted, it will not actually be removed from the Relativity document viewer due to a limitation in the Relativity viewer which does not give Blackout the ability to remove those annotations from the list.
  - To see the document with the annotation removed, the user would need to click the "Download Marked Up File" button or run the document through the production preparation project.

## Redacting attachments

### What to know

- Some PDF files allow for other files to be embedded into a PDF document itself.
- These may be used for multimedia content in the document, or as a means of retaining an external file reference when the file is archived or transmitted. In some cases, it may be required to redact these attachments.
- While some of the attached files may be listed through a Relativity supplied tab in the viewer, the only means Blackout provides for their redaction is through the use of the Blackout Document Review Tool.
- Each column within the Attachment Redaction Tool can be filtered using the  button.
- Any redactions to files made by the automated process will show up here as a redacted file. They will not appear in the quality control panel.

### How to do it

1. Open the **Blackout Document Review Tool** by clicking the  button at the bottom left of the viewer.
2. Choose the **Attachment Redaction Tool** by clicking the  button.
3. Navigate to the attachment that will be redacted. Then, click the  button. After a brief delay, the attachment will be redacted and the 'Redact' button will be grayed out and replaced with the  button.
  - If the redaction needs to be undone, the  button can be selected. This will undo the redaction of the selected attachment.

### What else to consider

- Attachments can also be redacted from an [Automated PDF Project](#) using a checkmark option on the project setup page.

- Attachments that are redacted will be removed completely from the document. To examine the file with the attachment removed, the user would need to click on the "Download Redacted File" button or run the document through the production preparation project.

## External redactions

### External redaction workflow

Before you begin

Occasionally reviewers encounter documents that can't be redacted with Blackout or are too large to be displayed for the Relativity viewer. Blackout allows Excel and PDFs that are redacted outside of Relativity to be associated with the native markup set in Blackout and subsequently produced alongside all the work product created with Blackout.

### Preparing for external markups

- External markups can be found by navigating to **Blackout > External Markups** within the workspace.
- Refer to the [Workspace tabs](#) page for granting access to this tab.
- To tag a document for use with the external markups tab, the Blackout Document Warnings field needs to be edited
- The external markups give users the ability to download and upload Excel and PDF documents.
- The uploaded file will be added to Relativity and associated with the markup set
- Externally redacted documents can be included in production preparation projects and native productions as if they were redacted with Blackout
- Uploading an externally redacted document will clear failed markups from the document.

Active Markup Set ⓘ Fifth ▼

Some documents have failed markups. These markups will not be included on download and will be removed on upload.

1 - 1 of 1 < >

Control Number	File Name	Externally Redacted	
Sample Clinical Trial Budget3.xls	Sample Clinical Trial Budget.xls	No	<div> <span>▲</span> <span>Download ⓘ</span> <span>Upload... ⓘ</span> </div>

### Example workflow

A sample real-world workflow could look something like this:

1. The case team identifies a set of PDFs and Excels that are too big to display in the Relativity viewer
2. These documents are separated with a Relativity search
3. The Blackout Document Warnings document field is added to an admin layout
4. A mass edit is run to set this field to have "Cannot be Redacted in Native Viewer" checked
5. Reviewers are granted access to the External Redaction page
6. Reviewers pick the markup set they are working with
7. Reviewers download documents to redact externally
8. Redactions are placed using the tool of choice such as Microsoft Excel or Adobe Acrobat
9. The redacted document is uploaded back to Relativity using the upload button

This workflow provides a great way to prevent reviewers from being disrupted while performing manual redaction using Blackout on the Relativity reviewer.

**Note:** The Active Markup Set selection within the **Blackout** → **External Markups** subtab indicates the markup set where documents will be downloaded from and uploaded to upon document re-upload.

## Tips for identifying documents

### Before review begins

The Relativity viewer, depending on the version of Relativity, instance settings, and infrastructure, has a maximum file size that it can display in the viewer. These documents are candidates for external markups.

- Identify and set aside these documents for external markups by creating a saved search to filter on file size
- Using this search, the documents can be flagged for external review using the 'Edit' mass action.

### Tagging documents for external redaction

1. Run the saved search from the previous step
2. Select the documents and pick **Edit** from the mass action menu
3. Add the **Blackout Document Warnings** field to a layout.
4. The specific field that needs to be checked is the "**Cannot Be Redacted in Native Viewer**" field.

## During review

While a review is taking place, some users may have the ability to update the Blackout Document Warnings field. They may identify documents as they progress that can't be redacted via the viewer. By providing access to update the Blackout Document Warnings field in a coding layout in Relativity, reviewers can tag these documents for external redaction and continue to the next document.

## Mass uploading externally redacted documents

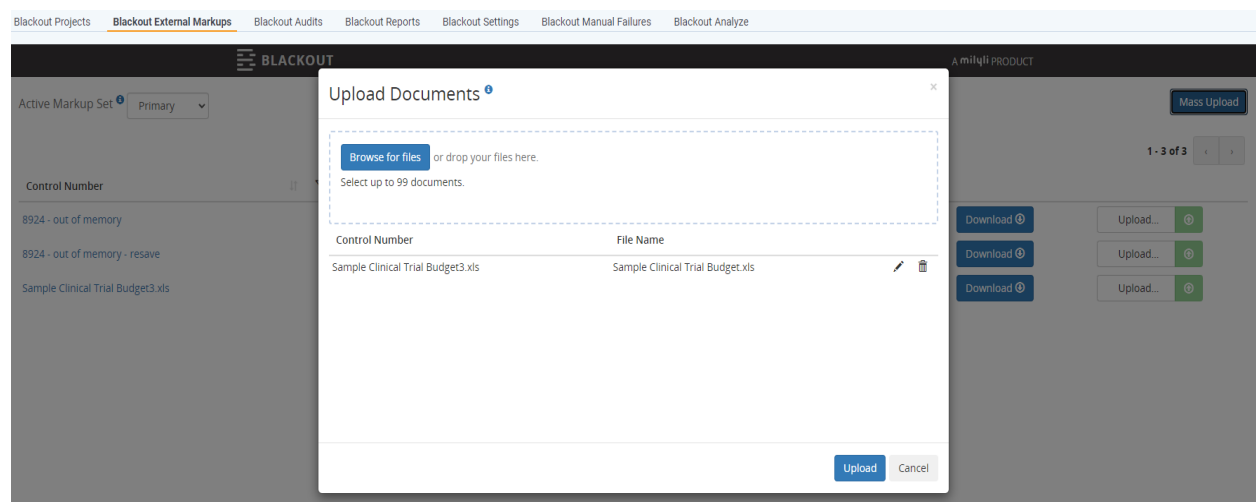
Mass upload will only work for documents already visible in the Blackout External Markups tab. The file extensions of the file you are uploading and the file on the document must match. Mass upload uses the following cascading rule set to map uploaded documents to control numbers:

### What to know

1. File name exactly matches the control number.
2. File name exactly matches file name.
3. File name starts with control number.
4. File name starts with file name.

### How to do it

1. Navigate to the **Blackout** → **Blackout External Markups** tab.
2. Click the **Mass Upload** button.
3. Choose the redacted files you want to upload and click **Open**.
  - a. Blackout will automatically attempt to match each file to an existing control number using the cascading rule set.
4. Review the results and make any necessary adjustments.
5. Click the **Upload** button to complete the process.



## Reviewing Documents

### What to know

- Once documents have been tagged as un-redactable, they will automatically show up on the **External Redactions** tab.
- If the number of documents is high, the reviewer can set the '**Externally Redacted**' filter to **"No"** to filter out documents that have had a redacted copy uploaded
- The external redactions page consists of the following columns:

Column	Description
<b>Control Number</b>	The default sorting is by control number alphabetically. Clicking on the control number allows quick access to the document viewer.
<b>File Name</b>	The name of the document file; can be clicked to download the file
<b>Externally Redacted</b>	Indicates if the document has already been externally redacted
<b>Download</b>	An easy to identify the download button
<b>Upload</b>	A two-stage upload process; click upload to select a file, click the up arrow to upload the file

### Auditing external markups

Each download and upload action are logged as manual native markup action automatically. Additionally, each document that is externally redacted will also appear on the **Blackout Quality Control** panel as a single markup.

Use the following steps to view the audit entries.

1. Navigate to the Blackout tab and click on the **"Review Manual Native Markups"** button at the top of the page.
2. Click on the **Audits** tab. Entries for the download and upload actions will display respectively:
  - External Redaction - Downloaded
  - External Redaction - Uploaded

Job Overview

Advanced Stats

Run Log

Audits

Audits

Cell Range	Created On	Created By	Document	Action
DOCUMENT	5/16/18 3:26 PM	Randall, Tim	trand_0000000010	External Redaction - Uploaded
DOCUMENT	5/16/18 3:26 PM	Randall, Tim	trand_0000000010	External Redaction - Uploaded
DOCUMENT	5/16/18 3:25 PM	Randall, Tim	trand_0000000010	External Redaction - Downloaded

## Tips and Tricks

### Documents maintain history

- The primary reason for setting the markup set at the top of the page is that the External Redaction workflow considers any redaction work that was previously done.
- Already have redactions from an automated project? No problem. Make sure the same markup set is selected. The download will show all those redactions on the downloaded document.
- External redactions are maintained sequentially in history, so both the external redaction or the automated project can be reverted independently.

### Documents don't need to be downloaded using the External Markup tab

- While the External Redaction tab helps maintain state and history by making it foolproof, documents can also be exported in bulk using the RDC. Keeping the document history in mind, use the mass action to set the primary native markup set for the saved search and then export the document. Distribute the documents accordingly.

### Multiple documents can be uploaded simultaneously

- If downloading multiple documents, reviewing them, and externally redacting them, they can be uploaded one after another.
- The external redaction page will maintain separate uploads for each document and keep track of the upload.
- Each one will let the user know when the upload has finished.
  - **Please note that there is not a mass upload at this time.**

# Preparing for production

## Creating a Production Preparation project

### What to know

- Redacting and highlighting Excels and PDFs with Blackout results in new files that Relativity does not have the functionality to include in a production.
- When creating a native production in Relativity, Relativity will always use the current file associated with the document object.
- Relativity must be instructed to switch the current file for each redacted or highlighted document in the production to the proper marked-up file. Blackout provides the Production Preparation project type to perform this update.
- When run, the production preparation project will swap the current file for each document in the saved search to the marked-up file for the selected saved search.
- The project will lock these documents from being modified further by Blackout so that the document can be safely produced with Relativity without risk of modification by another user.
- Relativity **does not** provide redacted extracted text creation for native files. Utilizing this project type will provide the capability of generating this text.

### How to do it

After completing redaction and before running the Relativity production, a production preparation project can be started from the Blackout Project tab.

1. Click **Create New Project**.
2. Select **Production Preparation**.
3. The Production Preparation project creation form will be displayed.

### The production preparation project performs four key functions.

1. **Update documents to Markup set:** Updates each document in the saved search to the selected markup set and ensures that the associated file is the active file.
2. **(Optional) Long Text Field for Native Extracted Text:** Displays long text fields in the workspaces on the document object. The selected field will have extracted text generated for each document in the saved search taking all markups into consideration.
3. **(Optional) Retain a copy of the redacted document:** Will generate a point in time copy of the marked-up document and store it in the document field 'Blackout - Produced Document'. Each run of the production project will generate a file. Useful



for documents that may be marked-up differently on a single markup set to multiple parties.

4. **Lock documents:** Each document in the saved search will be locked for modification by Blackout until unlocked. This ensures that the file exported by the RDC will be the correct file.

## What else to consider

- Both the name and saved search are required fields of the create form.
- After filling out the form and selecting the operations for the project, the ready to run page will be displayed.

## Recommended workflow

How the production workflow is implemented will vary based on case requirements, number of markup sets, and number of concurrent reviews taking place. However, the most common critical path workflow would look like this.

1. Identify a subset of Excels or PDFs to be redacted
2. Redact documents through one of or a combination of manual and automated projects
3. Quality review the markups
4. Use Relativity search to create a saved search of marked-up documents to produce natively.
5. Create and run a production preparation project that includes setting the markup set and creating the redacted extracted text
6. Create a Relativity Native production and choose the same saved search
7. Export the production with the RDC
8. Navigate to the production preparation project and unlock the documents

## Running the project

### What to know

Run time will vary depending on the number of documents and options selected. The following factors all contribute to run time:

- **Updating the markup set** will increase run-length based on the number of documents. This process takes longer for PDFs as it also burns in the PDF at this time.
- **Processing redacted text** will increase run-length based on the number and size of Excels and PDFs.

- **Retaining a copy of the redacted file** will increase run-length based on the number of documents.
- **Locking documents** will increase run-length based on the number of documents.

## How to do it

1. After the project is complete, navigate to the Production Preparation project.
2. Click **Run** to start the project. Run time will vary depending on the number of documents and options selected.
3. The running project will be queued into the Blackout agent. Detailed information will be sent back, like an image or spreadsheet project.
4. PDFs included in the project will be burned-in during production preparation run.
5. After the project completes, a status page will be displayed.

## What else to consider

- If any non-Excel or PDF documents are included, they will be automatically skipped and included in the **Documents Skipped** count.
  - Clicking on this box will bring the user to a saved search of the skipped documents for additional verification.
- Clicking the **Documents Prepared** button will navigate to a saved search of all the documents that have successfully run through the production preparation project.

## Searching for locked documents

Documents that have been locked for production can be searched by adding the **Blackout Production Lock** field to a saved search and setting the value to **is: Yes**.

Filter: Blackout Production Lock

Operator  ▼

Value ☒ Yes ☐ No

Apply
Cancel

## Document warnings

### What to know

- If any document fails for any reason, they will be included in a count of Documents with Warnings.

- Clicking this button will download a CSV that contains information on which documents triggered the warning.
- This process ensures that most of the work will be completed, and any problematic documents can be addressed individually.

### Common failures may include:

- Document issues preventing the processing of text
- RSAPI failing or being overloaded in the environment
- Object manager failing or being overloaded in the environment.

## Markup Review Pane

When a prepared document is locked for production review, you can still access the Blackout Markup Review Pane to view redactions and original text. Simply click on the corresponding row to jump to the location of a redaction, or click "View" in the "Original Text" column to view the original text.

**Note:** *The locked version of the Markup Review Pane only displays Markup Review items and not content from other tabs.*

The screenshot displays the Blackout Markup Review Pane. The top section shows a spreadsheet with various markings: 'White Word Redaction' in row 4, 'Text Word Redaction' in rows 5 and 6, 'Yellow Word Highlight' in row 7, and 'Green Word Highlight' in row 9. The bottom section, titled 'Markup Review', contains a message: 'The document is currently locked for production. The following markups are in the **Primary** markup set.' Below this is a table with the following data:

Sheet	Cell Location	Type	Original Text	Matched Text
1	A1:A1	Redaction - Black	<a href="#">View</a>	
1	C3:C3	Redaction - White	<a href="#">View</a>	
1	G7:G7	Highlight - Yellow	<a href="#">View</a>	

## Unlocking Documents

### What to know

- Documents that are prepared for production are locked to prevent additional changes to that document until they are unlocked. This ensures that when the Relativity RDC exports the production, the proper file is selected for export.
- This protection is in place as the production export always pulls the active file, even if that is not the file that was active at the time of running the Relativity production.
- Once the production has been exported, there may be many reasons to continue working on the documents such as needing to provide additional markups before producing for another party.

### How to do it

1. Navigate back to the **Production Preparation project**.
2. Click the **Unlock Documents** button.
3. A dialogue will display to confirm unlocking the documents. The unlock project will be queued into the Blackout project queue and a loading indicator will be displayed. The operation could take several minutes depending on the number of documents.
4. Once the documents have been successfully unlocked, a message will be displayed along with a historical record.

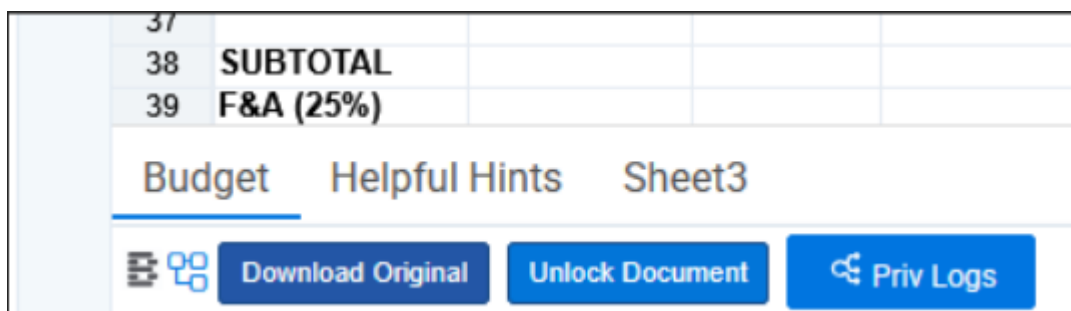
Re-running the project will re-lock the documents in the saved search.

#### **Note: Extracted text and copy retention**

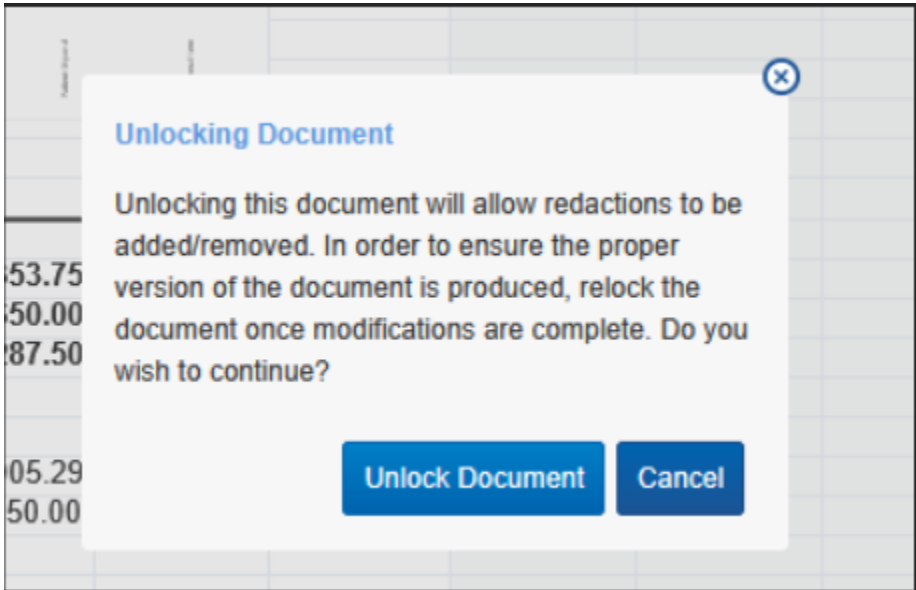
*Running the project, a second time will regenerate the extracted text over whatever was added to the field in the first run. If retaining a copy of the document was selected, an additional copy will be created.*

### Individual Document Unlock

If an individual document must be unlocked from the excel viewer that has been locked for production it can also be unlocked in the viewer itself instead of navigating to the project. To do this click on the Unlock Document button in the viewer.



The unlocked page will display a warning that the document is part of a production preparation project and needs to be re-locked to be properly included in production. Upon re-locking the document, the state will be updated, and the redacted extracted text will be regenerated if the project was configured to generate redacted text.

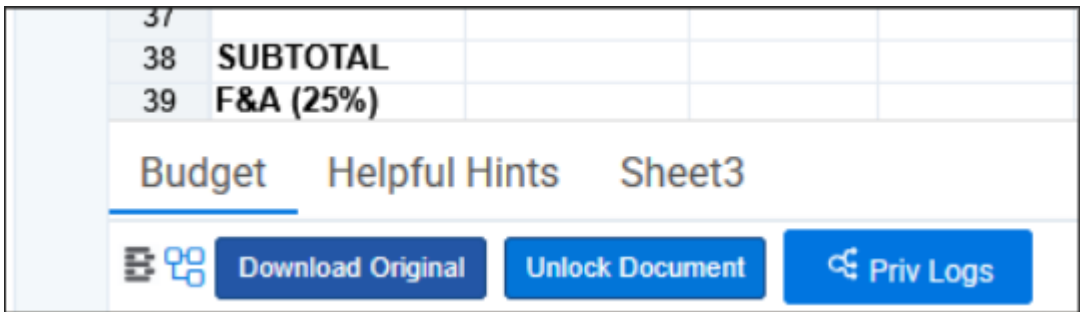


**Notes:**

- The option to unlock an individual document will not display if the production preparation fails or is stopped part way through.
- This feature is managed by workspace permissions under the Blackout object.

Downloading the Original File

If you wish to download the original unredacted native click on the Download Original button in the viewer.



## Accessing retained copies of the document

### How to do it

1. Using the Relativity viewer, navigate to a document that was prepared.
2. **Edit a layout** and add the **Blackout - Produced Documents** field to the layout.
  - All copies that have been created of the file will be contained in this field.
3. Click on the desired file. The **Blackout Produced Document Layout** for that file will be displayed.
  - From this layout, click on the produced file link to download the file. Clicking on the **Open in Viewer** link will open the file in the Relativity Viewer.
  - Clicking on one of these files will display the **Blackout Produced Document Layout** for that file. From this layout, click on the produced file link to download the file or click on the Open in Viewer link to open the file in the Relativity Viewer.
  - Choosing this option will open the file in a pop-out viewer.

## Searching

### Searching for documents using Blackout fields

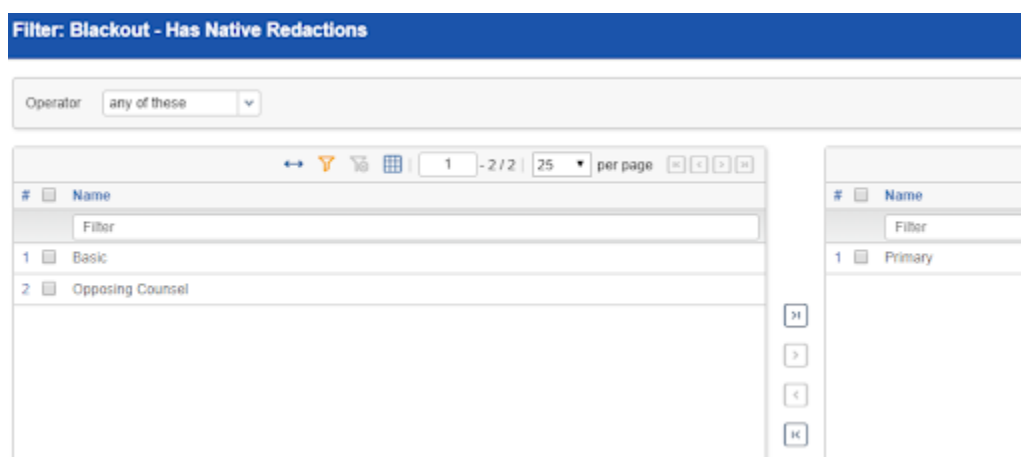
#### Blackout field descriptions

Field	Description
<b>Blackout - Has Native Redactions</b>	A multi-object field associated with the Markup Set Relativity field. Can be used to determine if one or many markup sets have Excel or PDF redactions.
<b>Blackout - Has Native Highlights</b>	A multi-object field associated with the Markup Set Relativity field. Can be used to determine if one or many markup sets have Excel or PDF highlights.
<b>Blackout - Has External Markups</b>	A multi-object field associated with the Markup Set Relativity field. Can be used to determine if a document was externally redacted and associated with one or many markup sets.
<b>Blackout - Has Manual</b>	A multi-object field associated with the Markup Set Relativity field. Can be used to determine if one or many markup sets have documents with manually placed markups.

<b>Native Markups</b>	
<b>Blackout - Native Prepared</b>	A multi-object field that contains the set of markup sets that have a prepared native. Can be used to help disambiguate from the existing Blackout - Has Native Redactions field.
<b>Has Blackout OCR</b>	A true/false field to indicate if the images for a given document have been OCR'd by Blackout.

## How to do it

1. Log into the Relativity environment as a System or Case Administrator with permission to create Relativity searches.
2. Navigate to the search page and click **New Search**.
3. Click **Add Condition**.
4. In the field list, select **Blackout - Has Native Redactions**.
5. Click the dropdown for **Add Condition** and select **Blackout - Has Native Redactions**.
6. Another menu will display with the list of markup sets in the workspace.
7. Check the markup sets that will be searched and move them to the right column.



8. Click the **Apply** button.
9. The condition will be added to the multi-object condition page.

## Condition: Blackout - Has Native Redactions

Operator

these conditions



### 1. Blackout - Has Native Redactions

any of these: Primary

10. Click the **Apply** button.
11. The full condition will be added to the search as a parameter.
12. Combine this with other Blackout and Document fields to find the specific documents are looking for.
13. Click **Save & Search** after setting other required fields.

## What else to consider

- The resulting set will be all the documents, in this example, that have Blackout native markups associated with the Primary markup set.

#		Control Number
1	<input type="checkbox"/> Edit	trand_0000000001
2	<input type="checkbox"/> Edit	trand_0000000004
3	<input type="checkbox"/> Edit	trand_0000000006
4	<input type="checkbox"/> Edit	trand_0000000007
5	<input type="checkbox"/> Edit	trand_0000000008

- This process can easily be repeated with the other Blackout markup set fields.
- Allow Pivot and Allow Group By is Enabled for these Fields

# Tools and reporting

## Blackout Analyze

### Creating an Analysis

#### What to know

- Blackout Analyze can be used to Analyze a set of rules against extracted text and provide information on document matches without having to revert redactions.



## How to do it

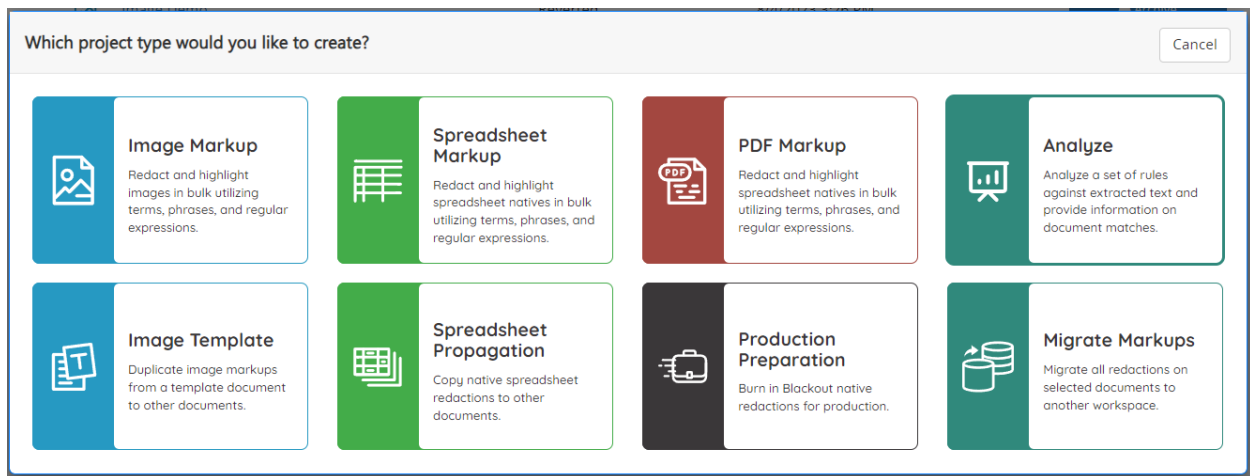
1. Navigate to Blackout | Projects
2. Click on Create New Project
3. Choose **Analyze** from the Project options
4. Enter a Name for your analysis
5. Choose a **Saved Search** of documents for the analysis to be ran against
6. Choose how you want to apply rules to your analysis:
  - o Upload your Rules Via CSV by clicking on the Upload Rules CSV File button
  - o Click the Add Rule Button and fill in the fields outlined below

Rules Table Fields

Field	Description
Rule Type	A dropdown field to choose Regular Expression, Word/Phrase, or dtSearch
Label	Name of the Rule
Pattern	<ul style="list-style-type: none"><li>• If Word/Phrase was chosen this will be the word or phrase and text that will be searched for across the document set</li><li>• If Regex is chosen you can enter a Regular Expression to search for patterns such as email addresses, social security numbers, credit card numbers, and any other content that may appear regularly throughout the document</li><li>• If dtSearch is chosen you can enter the dtSearch syntax to search for patterns based off a dtSearch index created by Blackout.</li></ul>
Rule Source	<ul style="list-style-type: none"><li>• Manual will display if rule was created by the Add Rule button.</li><li>• Name of uploaded CSV file displays if rule was uploaded via CSV.</li></ul>

7. After Entering your rules click **Save** to save the Analysis

**Note:** If on Blackout 4.9 or higher Blackout Analyze Projects can be created from the Blackout Project tab or the Blackout Analyze tab

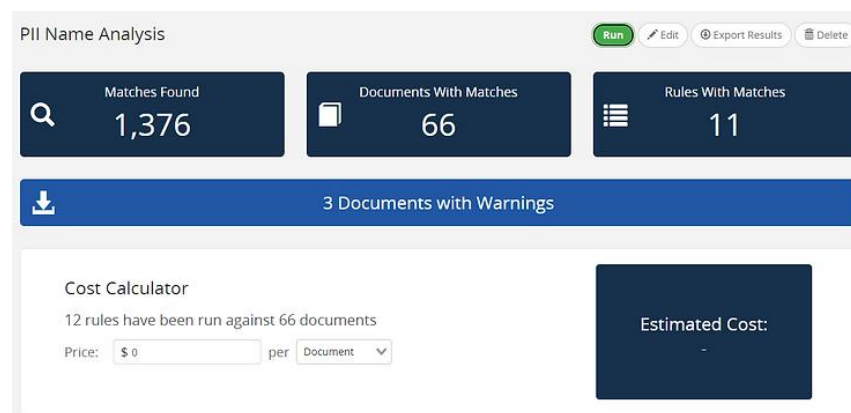


## Running an Analysis

### What to Know

- Re-running a previously ran analysis will override past executions and you will not be able to recover previously ran jobs.
- After the analysis has been saved click the **Run** button
  - Once the analysis begins running, the analysis will be queued and then start being processed by the Blackout Agent.
  - After the analysis completes, a results page displays information about the completed work and provides a launchpad for further review.

## Reviewing Analysis Results



When the Project completes the items below will be displayed

Field	Description
Matches Found	Count of unique matches found by the rules across the selected document set.
Documents with Matches	Number of documents in the set that have matches to rules created
Rules with Matches	Number of rules that successfully would generate a markup
Documents with Warnings	The number of documents that encounter a non-analysis breaking warning. Clicking this button will download a CSV of the document warnings that include information about what happened and any error messages. Providing this CSV to Milyli can greatly assist in diagnosing any issues that may have been encountered. Typical reasons for warnings include missing images or failed OCR.
Cost Calculator	Used to estimate price of a potential Blackout project
Estimated Cost	Total Cost if a Blackout project was ran using values from Analyze and the Cost Calculator

## Exporting Results

Clicking **Export Results** will export a CSV of the results providing the following information for every match:

- Document ID
- Rule Type
- Rule Label
- Rule Pattern
- Rule Source
- Document Name
- Document Extension
- Document Size (KB)
- Matched Text
- Match Index

## Generate a Saved Search of Documents with Matches

Clicking on the **Documents with Matches** card will create a persistent list and a saved search you can use to review the documents further or create a future Blackout Project.

## Cost Calculator

The integrated Cost Calculator lets you calculate an estimate on using blackout on the results of the project by entering a price per document.

**Note:** The calculator can be hidden by setting the 'ShowAnalyzeCostCalculator' instance setting to False. This Setting can be manually created from the instance setting tab with the below values:

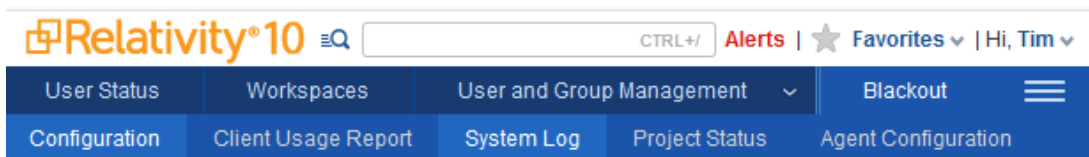
- **Section:** Milyli.Blackout
- **Name:** ShowAnalyzeCostCalculator
- **Value Type:** True/False
- **Default:** true

## Exporting System Logs

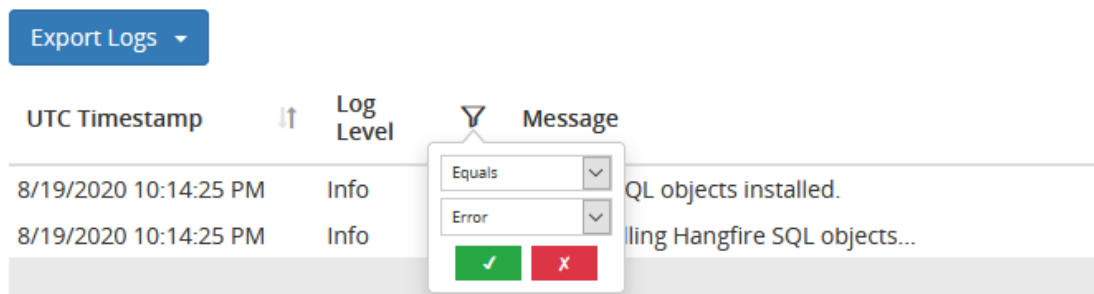
Occasionally Milyli support will ask you to export the Blackout system logs. Doing so is simple but requires Relativity Administrator permissions. If you do not have access to Relativity Admin tabs, please refer this article to someone on your team to help!

To export the system logs, follow these simple steps:

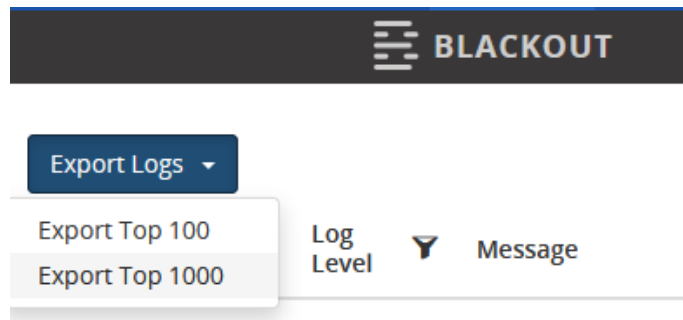
1. Navigate to the **Blackout tab** in the System Admin tabs
2. Pick the **System Log** sub-tab



3. Filter the system logs for errors



4. Click the **export logs** button and select **Export top 100** or **Export top 1000**



## 5. Share the downloaded CSV with Milyli

Note: The system logging level can be configured with an Instance Setting.

- Name: SystemLoggingLevel
- Section: Milyli.Blackout
- Value Type: Text
- Value: Can be set to Fatal, Error, Warn, Info, Debug, or Trace

## Reviewing usage metrics for an instance

### Client usage metrics

#### What to know

- Usage data may occasionally need to be reviewed for billing or usage tracking.
- The client usage metrics report provides details for each client, matter, and workspace with Blackout usage.
- The report processes metrics for the date range selected using the same logic that is used for billing.

#### How to do it

1. Log into the Relativity environment as a System Administrator
2. Navigate to the **Blackout Configuration tab, Blackout → Client Usage Report**
3. Input an email address
4. Select the date range that needs to be reviewed
5. Click **Request Usage Metrics** Report
6. An email will be delivered to the email address with an attached CSV of usage data

## Understanding markup counts

- Placed markups are calculated by taking the total number of markups placed within the selected date range and subtracting the number of markups both created and reverted within that date range.
- Milyli always calculates usage using the beginning and end of a given month.

## Exporting metrics

### Exporting metrics for monthly billing

#### What to know

- Most installations of Blackout will be configured to report their usage automatically. In some cases, however, there may be legal or environmental reasons why usage metrics cannot be automatically communicated to Milyli.
- Milyli provides a manual export process for these cases.

#### How to do it

1. Log into the Relativity environment as a System Administrator
2. Navigate to the **Blackout Configuration tab, Blackout → Configuration**
3. On the right half of the screen, click the date range and select the month to export
4. Click the **Download Metrics** button
5. Deliver the downloaded zip file to Milyli via [support@milyli.com](mailto:support@milyli.com)

## Review instance projects

Occasionally other projects may be using Blackout resources resulting in your new project sitting in the queued state. To understand what other work is taking place, Blackout provides a tool to check on what other Blackout projects are running across the instance. Doing so is simple but requires Relativity Administrator permissions. If you do not have access to Relativity Admin tabs, please refer this article to someone on your team to help out.

To review instance projects, follow these steps.

1. From the admin level of Relativity, navigate to the **Blackout | Blackout Project Status** tab.
2. All active projects will be displayed and sorted by date in descending order with running projects at the top.

BLACKOUT

A milqli PRODUCT

Project Dashboard

Change Priority

↺

Priority	Type	Name	Workspace	Status	Progress	Submitted Time	Resource Pool
		Q	Q				Q
1		All Excel PII	ABC Corp Case	Queued	0/0	4/17/2025, 11:46 AM	Default
2		All Image PII	ABC Corp Case	Processing	6/818	4/17/2025, 11:46 AM	Default

7

15

30

Page 1 of 1 (2 items)

1

There are other things you can do such as filter the projects by name, workspace, status, progress, submitted time, and resource pool. You can also click into specific workspaces to alter the projects themselves.

## Blackout Queue Priority

Blackout projects are ordered first come first serve based on when the Run button is clicked. Hitting stop on a Blackout project will pause the project until it is restarted. Using this pause feature will then move the next queued project to the top of the list. Once a project is restarted, it will be moved to the end of the queue.

### Adjusting the Blackout Project Queue

Admins may adjust which project is a higher priority by clicking the Change Queue button in the Project Status tab. This will allow a smaller project to take precedent over larger projects so they may finish sooner.

BLACKOUT

A milqli PRODUCT

Project Dashboard

Change Priority

↺

Priority	Type	Name	Workspace	Status	Progress	Submitted Time	Resource Pool
		Q	Q				Q
1		All Excel PII	ABC Corp Case	Queued	0/0	4/17/2025, 11:46 AM	Default
2		All Image PII	ABC Corp Case	Processing	6/818	4/17/2025, 11:46 AM	Default

7

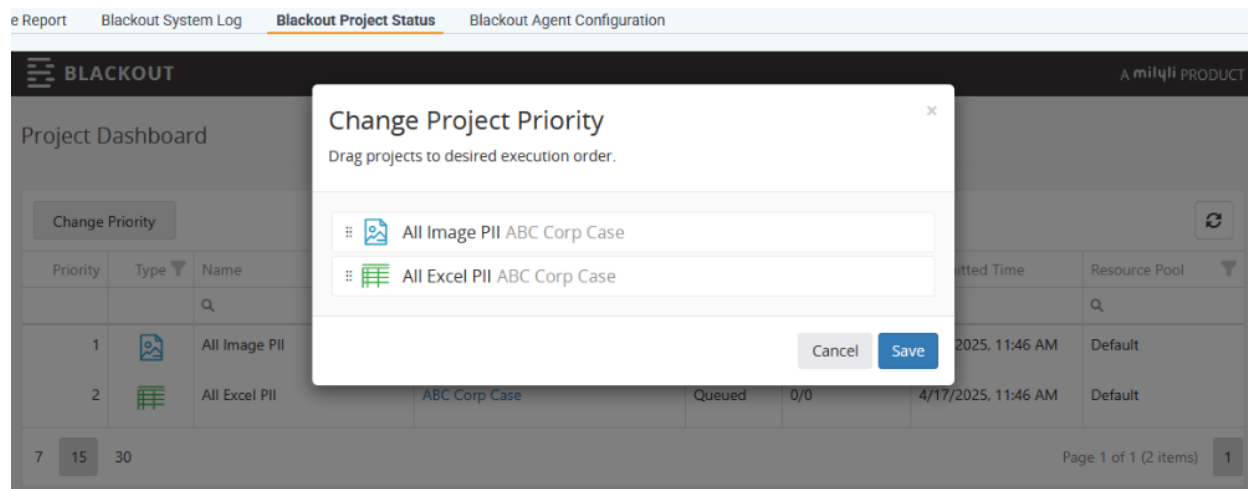
15

30

Page 1 of 1 (2 items)

1

In the new window you may choose to move a project so it will be prioritized above other Blackout projects.



## Workspace reports

Reporting can be used to export custom reports based on any field on the document object and combine that with a wide range of Blackout specific data. There are two types of customizable reports that allow for exporting a complete set of information for each redaction or condense this down to the document level.

### The markup report

#### What to know

- The markup report will generate a report of all the selected fields for each markup placed on the documents in the saved search.
- Information that this report can provide includes:
  - Relativity Manual Markups
  - Relativity Viewer Manual Excel Markups
  - Blackout Automated Markups
  - Blackout Automated Native Excel Markups

### The document report

#### What to know

- The document report will generate a report of all the selected fields for each document in the saved search.
- If a document field has multiple tags selected for it, it will be aggregated and displayed with semicolon separators.
  - For example, if there are both automated and manual markups on the document, the markup automated column will display both true and false. If a



multiple-choice document field is selected, the values will be displayed comma separated.

## Available report fields

### What to know

- Blackout provides the ability to report on any field that is currently associated with the document object, Blackout specific fields, and fields from the Relativity redaction table.
- This flexibility allows the creation of many different types of reports.

#### **Note: Avoid long text**

- Attempting to include long text such as extracted text will pull all the extracted text of the document into a single cell. This may result in a broken CSV.
- After choosing the fields for the report, they can be re-ordered. The first field selected will be the leftmost column in the report, while the bottom will be the rightmost column.

## Blackout specific fields

### What to know

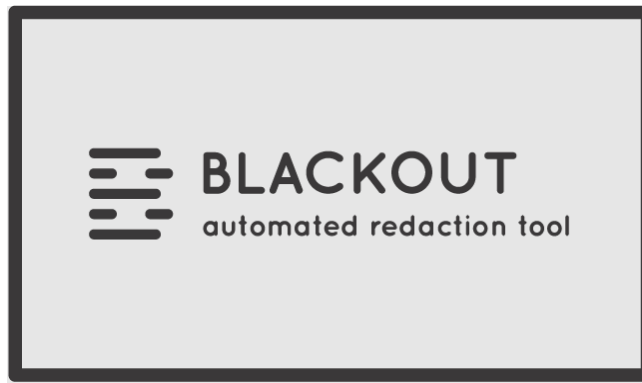
- The following fields are populated by Blackout or the Relativity Redaction table.
- In some cases, the data may be collected from both systems simultaneously such as Markup scope which can be provided by Blackout for excel redactions, but the Relativity redaction table for image redactions.
- It is important to note that this report is not restricted to just getting redaction information from Blackout created redactions.
- It is possible to also pull data from redactions created entirely through Relativity!

Field	Description	Additional Results
Markup Type	The type of redaction placed	Redaction or highlight
Markup Scope	The markup scope selected when placing the markup. This value is provided for both Blackout created, and Relativity created markups.	<b>Images:</b> Word / Line / Paragraph / Page  <b>Native Excel:</b> Character / Cell / Sheet / Row / Column

<b>Markup SubType</b>	The markup subtype selected when placing the markup. This value is provided for both Blackout created, and Relativity created markups.	<b>Redaction:</b> Black / Text / White / Cross / Inverse  <b>Highlights:</b> Yellow / Green / Blue / Orange / Pink / Purple
<b>Markup Text</b>	The text entered when placing a redaction. This value is provided for both Blackout created, and Relativity created text redactions.	
<b>Markup Set</b>	The markup set a redaction is associated with. This value is provided for both Blackout created, and Relativity created redactions.	
<b>Markup Reason</b>	The reason that was specified when creating the Blackout rule groups. This field is exclusive to Blackout.	
<b>Markup Page Number</b>	The page number where the markup is placed.	
<b>Markup Cell</b>	The cell location where a native excel markup is placed.	
<b>Markup Sheet</b>	The Excel sheet that was redacted during a native excel automated job.	
<b>Markup Automated</b>	Displays if the markup was created by a Blackout automated job or not. This field can display both True and False when generating the privilege log report type.	True - Yes False - No
<b>Markup Created By</b>	Displays the user who created the markup. If the markup was the result of a Blackout job, it will display the user's name who executed the job.	

## Downloading the reports

1. When all the fields required for the report have been selected, click the **Generate & Download Report** button.
2. A CSV containing the desired information will be generated and downloaded.



## About Milyli

Milyli is an eDiscovery software development firm with a broad range of experience developing products from the ground up, as well as creating custom solutions both inside and outside of the Relativity eDiscovery platform. To learn more about Milyli, look at our website!

<https://www.milyli.com/ediscovery-technology-experts>

## Milyli Customer Advocacy

The Milyli Customer Advocacy team is our team dedicated to supporting you, our customer! We are here to help you make the best of the software. Whether you need help with developing a new workflow, discuss an upcoming case, or just have a question about the product, we are here to help.

Support Hours	Support Contacts
Support is available Monday through Friday from 8:00 AM CST to 6:00 PM CST.	<a href="mailto:support@milyli.com">support@milyli.com</a> 312.265.0136

