

7a. Create a Custom Related Panel

This PICNIC explains how to create a Custom Related panel to display fields with the same content if you do not have analytics. Once these records are displayed in the panel, you can review these documents using Document Compare on the Related tab.

Steps

1. In the Panels tile, click **New**, and then select **Custom Related Panel**.
2. Give the panel a meaningful name. From the **Matching Fields** list, choose a field you will identify documents that contain the same content. For details to set up the Matching Fields, see the field information below.
3. Click Next. In the **Display Fields** section, choose the fields you want to see on the panel.
4. Set the appropriate security for the panel.

Metadata Field:
Display the Same
Content

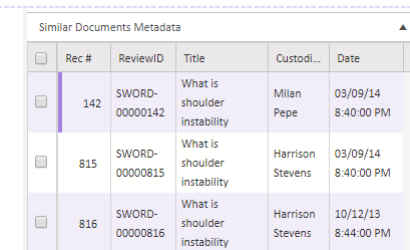
Coded Field: Compare
Multi-Version
Documents

Notes:

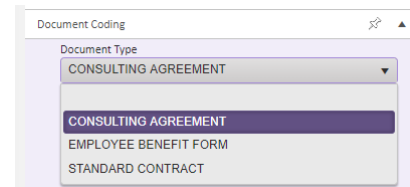
In **Matching fields**, choose fields like Title, File Name, and Subject. This will allow reviewers to see records that most likely have the same field content as the displayed document.

The example along the side uses the field Title as a match.

If you are using the database to just compare files (for example, to compare versions of a standard contract or agreement), then create a field with a Lookup List. Once coded, use this field as your **Matching** field.



Rec #	ReviewID	Title	Custodi...	Date
142	SWORD-0000142	What is shoulder instability	Milan Pepe	03/09/14 8:40:00 PM
815	SWORD-0000815	What is shoulder instability	Harrison Stevens	03/09/14 8:40:00 PM
816	SWORD-0000816	What is shoulder instability	Harrison Stevens	10/12/13 8:44:00 PM



Document Coding

Document Type

CONSULTING AGREEMENT

CONSULTING AGREEMENT

EMPLOYEE BENEFIT FORM

STANDARD CONTRACT