

# Getting Started with iCONNECT®

## Logging in and Opening a Project

1. Enter your user name and password for iCONNECT. If needed, select the language in which you want to view the interface. Click **Log In**.

2. In the Projects page, click the JFK Documents project to open it.

This project is listed as a favorite under the Favorites heading.

**TIP:** Log out at any time: click your user name and selecting **Log Out**.

## Keyboard Shortcuts

Each iCONNECT View has its own keyboard shortcuts. Shortcuts include:

CTRL+ALT+d Move to the next screen

CTRL+ALT+a Move to the previous screen

CTRL+Space Go to the next document  
(Document View only)

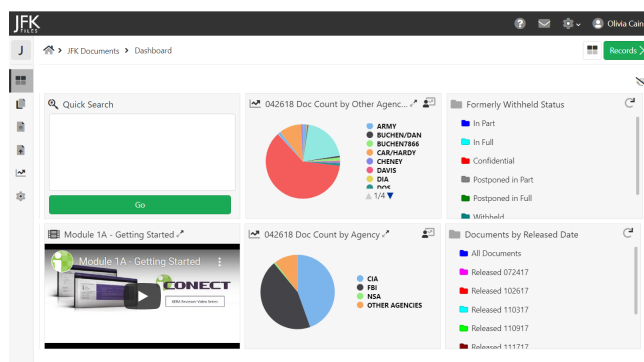
## Quick File and Project Access

The Dashboard displays project collaboration tiles, and other tiles that contain information about the project that can be used to retrieve that information quickly (such as the Quick Search or Folder tile), or external resources about the content (such as a website tile).

## Viewing Documents

You can view a list of documents in Table View by selecting a folder in the **Documents by Release Date** tile, or another tile that contains folders. This will open the list of documents in Table View.

In Table View, you can review each document by double-clicking on a row. This will open the document in Document View.



**TIP:** Use navigation arrows (located beneath your user name) to move between Views.

## Viewing a Graph

1. In the graph tile, click **Open in iVIEW** . The graph opens in the iVIEW tab in Table View.

## Finding Documents

In Table View, you can view a list of all the documents in grid or thumbnail format, search for and filter data in the list, and review the documents one at a time in Document View.

## Facets and Filters

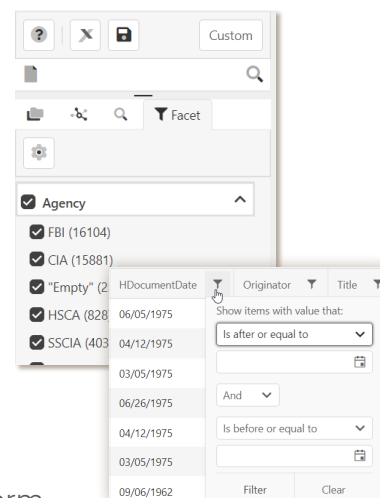
Use facets to retrieve relevant documents:

1. In Table View, click the **Facet** tab.
2. Click on the heading to open a facet.
3. If you want to see one item only, then clear the checkmark in the heading, select the facet that you want to view, and then click **Update**. (The Update button is located at the bottom of the Facet tab.

Facet selections are remembered as you refine your search.

Use filters to retrieve data in a specific field:

- ♦ Click **Filters** on the toolbar in Table View.
- ♦ In a text field, enter the text you want to find and click **Filter**.
- ♦ In date and numeric fields, specify a search: search for empty fields, perform an equals search or a range search, and then click **Filter**.



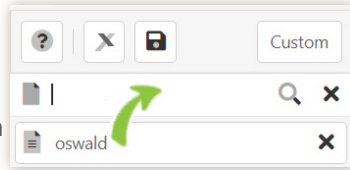
To learn more about iCONNECT, visit [www.iconect.com](http://www.iconect.com)

# Searching

## Editing and Combining Searches

To edit a search in the Search area:

Click and drag the search term into the Quick Search box and then change the search criteria as necessary.



To combine searches:

1. In the **Search History** section of the Custom form, select the searches and then click AND, OR, or NOT.

**TIP:** To combine previous search criteria, enter the Search History numbers. For example, enter 1 AND 2 NOT 3 to use the search criteria of searches 1 and 2, excluding the criteria of search 3.

2. Click **Quick Search** to run the search.

## Common Search Operators

**\*** **WILDCARD (multiple character).** Use in the middle of a word, or at the start or end of a word.  
*financ\** to return *finances, financing, etc.*

**" "** **PHRASE.** Place phrases in quotes.  
*'financial report'*

**AND** Use between words to return documents that have the two words.  
*financial AND smith*

**OR** Use between words to return documents that have either word.  
*financial OR smith*

**NOT** Use at the start of a word; can also be used between words to "return a but not b."  
*financial NOT smith* to return the word financial but not the word smith

There are also search operators for fuzzy misspellings, stem

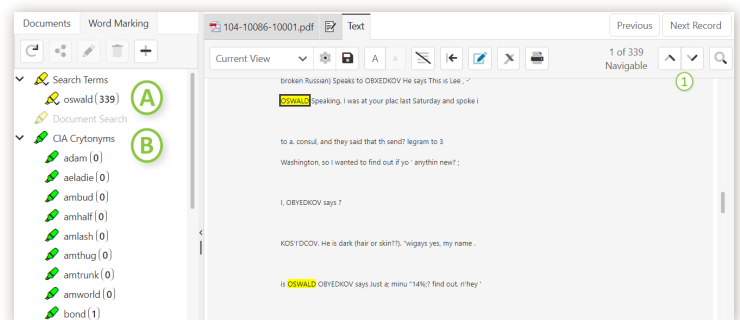
# Reviewing Documents

In Document View, you can review individual documents, search for keywords or phrases in a document, comment on a document, and review how these documents were categorized (or coded). See the final page of this file for a general overview of Document View.

## Search Hits and Word Marking

Keyword search results (from Table View) and Word Marking highlight key terms in the document collection:

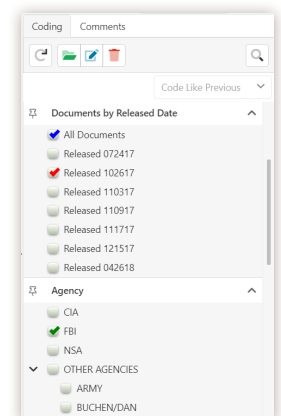
- A. Search Terms and keyword searches in the Text tab (Document Search) are highlighted in yellow. You can move through the navigable search results using the search navigation arrows (1).
- B. Word Marking terms are shown in the color specified by the Word Marking list. Any term can be enabled or disabled as you review documents.



## Reviewing Categorization or Coding

If the Coding tab is not the active tab in iCONNECT, then click the Coding tab.

You can view the categorization for each document through the Coding tab. When you navigate to the next document, the Coding tab will be updated with new checkmarks as applicable.



# iCONNECT Table View

Table View is used for searching and organizing documents: use multiple search, filter and viewing techniques, and folder the documents for collaborative review in Document View.

## SEARCH OPTIONS

Find similar documents, save a search, and access custom search options.

## CUSTOMIZE THE VIEW

You can set which fields display and save these settings as a template.

## VIEW DATA VISUALIZER GRAPHS

Review dates, documents, custodians in graph format.

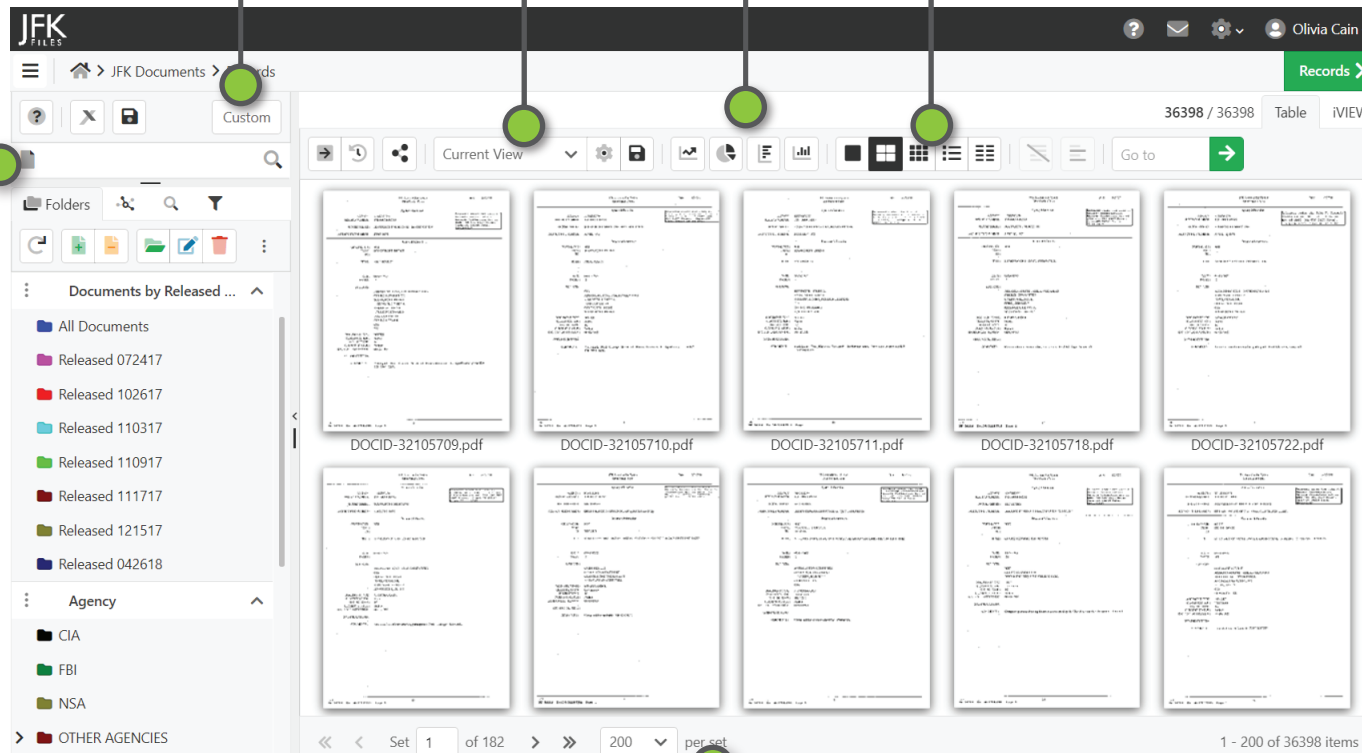
## PREVIEW DOCUMENTS

Quickly assess documents in thumbnail format. You can switch between thumbnail view and the standard grid view.

## ORGANIZE DOCUMENTS

Search for relevant documents using the Quick Search box and the Facet tab.

Use the folder icons to create folders, add, remove documents and delete folders.



## NAVIGATE TO DOCUMENT VIEW

When this arrow is clicked, the selected documents will be taken to Document View.

Or press CTRL + Alt + D to go to Document View.

## RECORD SELECTION

Locate a record by entering the record number in the Go to box.

## SET NAVIGATION

Displays the currently viewed set of images/native files.

# iCONNECT Document View

Document View is used for reviewing documents: view one document at a time. The document could be in native format and could include text scanned or extracted from a document.

Use the Native file tab to review the native file in image format or review metadata in the Text tab.

**CUSTOMIZE THE VIEW**  
In the Text tab you can set which fields display and save these settings as a template.

**REVIEW THE NATIVE FILE**  
Use the Native file tab to review the document.

**REVIEW METADATA**  
Use the Text tab to view document metadata and other file information.

**SEARCH FOR KEY TERMS**  
Quickly retrieve key terms in the current document (Native file tab and the Text tab only).

**REVIEW SECTION**  
Code the document and review actions taken on the document.

**RETURN TO TABLE VIEW**  
Use the arrow to return to Table View.

**DOCUMENT LIST SECTION**  
Displays record information for the currently displayed document.

**PAGE NAVIGATION**  
Displays the currently viewed set of images/native files. This list contains the records that were selected in Table View.

**CODING DOCUMENTS**  
Use the Coding tab to code (or review) documents.

**RELATED**  
Retrieve documents similar to the currently displayed document.

The screenshot displays the iCONNECT Document View interface. At the top, a navigation bar shows the document path: 'JFK Documents > Records > Document: 1 of 2556, Record 13'. Below this, a toolbar contains icons for document actions and a search bar. The main document viewer displays a document titled 'JFK ASSASSINATION SYSTEM IDENTIFICATION FORM'. The document content includes sections for 'AGENCY INFORMATION' and 'DOCUMENT INFORMATION'. The 'AGENCY INFORMATION' section lists: AGENCY: FBI, RECORD NUMBER: 124-10001-10081, RECORD SERIES: DL, and AGENCY FILE NUMBER: 100-10461-1437. The 'DOCUMENT INFORMATION' section lists: ORIGINATOR: FBI, FROM: OFLAHERTY, JOHN JAMES, TO: DIRECTOR, FBI, TITLE: (blank), DATE: 12/13/1963, PAGES: 39, and SUBJECT: SEE FBI 105-82555-731. A small box in the bottom right corner of the document viewer contains the text: 'Released under the John F. Kennedy Assassination Records Collection Act of 1992 (44 USC 2107 Note). Case#:NW 54463 Date: 10-12-2017'. On the left, a document list section shows a table of records with columns 'Rec #' and 'File Name'. The table lists records 13 through 38, all with file names starting with 'DOCID-32113207.pdf'. On the right, a sidebar contains a 'Coding' tab and a 'Related' section. The 'Coding' tab shows a list of documents by release date, with 'Released 102617' selected. The 'Related' section shows a list of agencies, with 'FBI' selected. The interface also includes a 'RETURN TO TABLE VIEW' button in the top left, a 'DOCUMENT LIST SECTION' on the left, and a 'PAGE NAVIGATION' section at the bottom left.

Rec #	File Name
13	DOCID-32113207.pdf
15	DOCID-32113382.pdf
19	DOCID-32113682.pdf
22	DOCID-32113964.pdf
23	DOCID-32114164.pdf
25	DOCID-32114232.pdf
26	DOCID-32114444.pdf
27	DOCID-32114649.pdf
30	DOCID-32115208.pdf
34	DOCID-32121538.pdf
35	DOCID-32121543.pdf
36	DOCID-32121634.pdf
38	DOCID-32123893.pdf