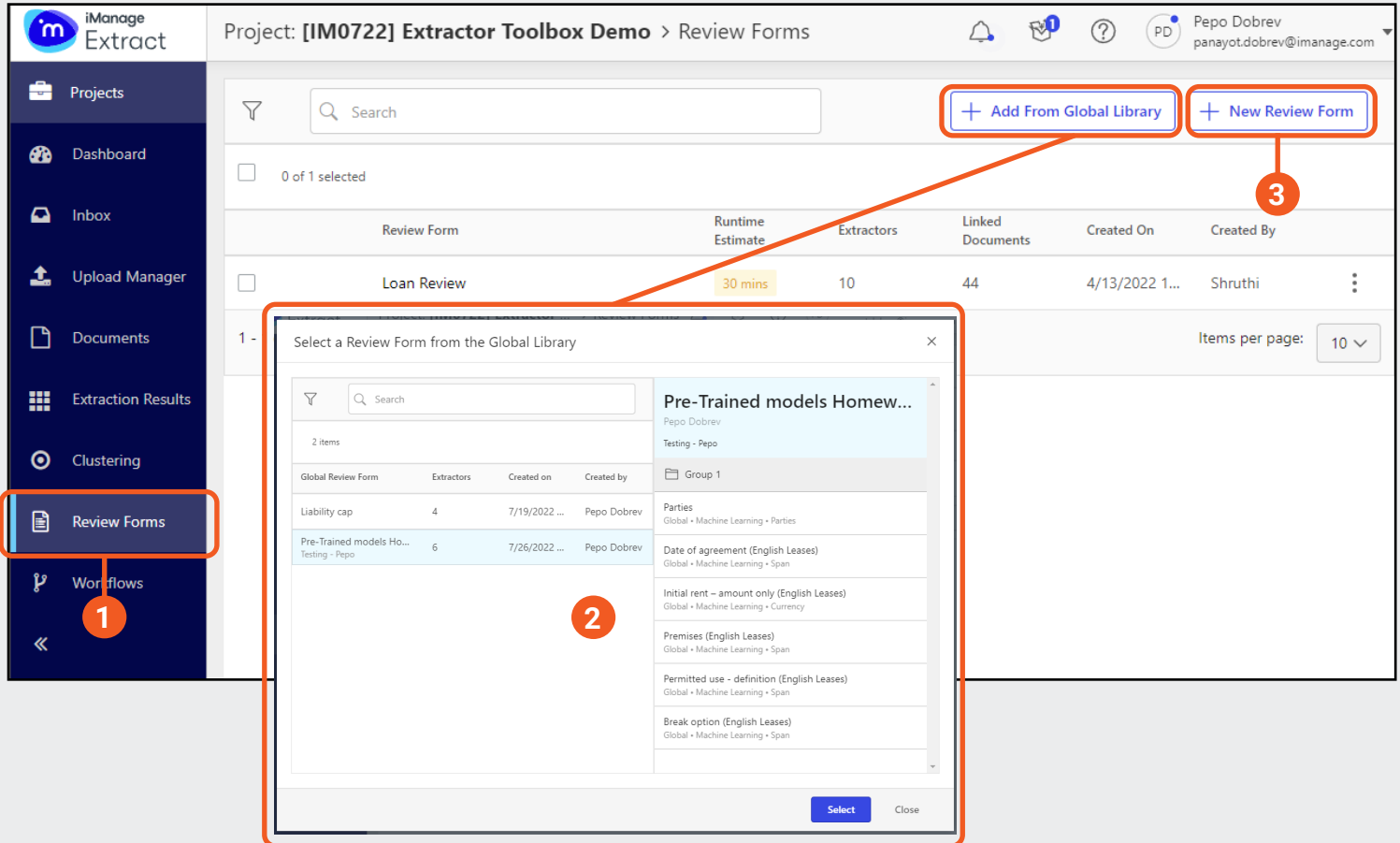


Creating Review Forms and Extractors

In iManage Extract, a **Review Form** is a list of extractors that will run on linked documents. You can create a new Review form or import a global Review form from the **Review Forms Library**, and reconfigure it if required. Review forms are project specific and are not available to other projects. However, after creating a project-specific review form, you can save it to the Review Forms Library.

An **extractor** is a tool responsible for finding the value of a data point in a document. Extractors can be trained by the user or available **pre-trained** by our internal iManage Lab Knowledge Engineers.



The screenshot shows the iManage Extract interface. The left sidebar has a 'Review Forms' tab highlighted with a red box and a '1' callout. The main area shows a table of review forms with a 'Loan Review' form selected. Two buttons, '+ Add From Global Library' and '+ New Review Form', are highlighted with red boxes and a '3' callout. A dialog box titled 'Select a Review Form from the Global Library' is open, showing a table of review forms with a '2' callout. The dialog box also shows a list of pre-trained models on the right.

Review Form	Runtime Estimate	Extractors	Linked Documents	Created On	Created By
Loan Review	30 mins	10	44	4/13/2022 1...	Shruthi

Global Review Form	Extractors	Created on	Created by
Liability cap	4	7/19/2022 ...	Pepo Dobrev
Pre-Trained models Ho... Testing - Pepo	6	7/26/2022 ...	Pepo Dobrev

1. Review Forms tab

You can view all project specific Review Forms from the **Review Forms** tab. You can also import a new Review form from the **Global Library**, create a new review form and add extractors to it, view the **Runtime Estimate** for a Review form, **duplicate** extractors and create **chains** of extractors.

2. Global Library

Select **Add From Global Library** if you want to add a review form from the Global Library. Select a Review Form from the Global Library dialog box appears. Select a review form, and then click Select. The selected review form gets added to the existing review form list.

3. New Review Form

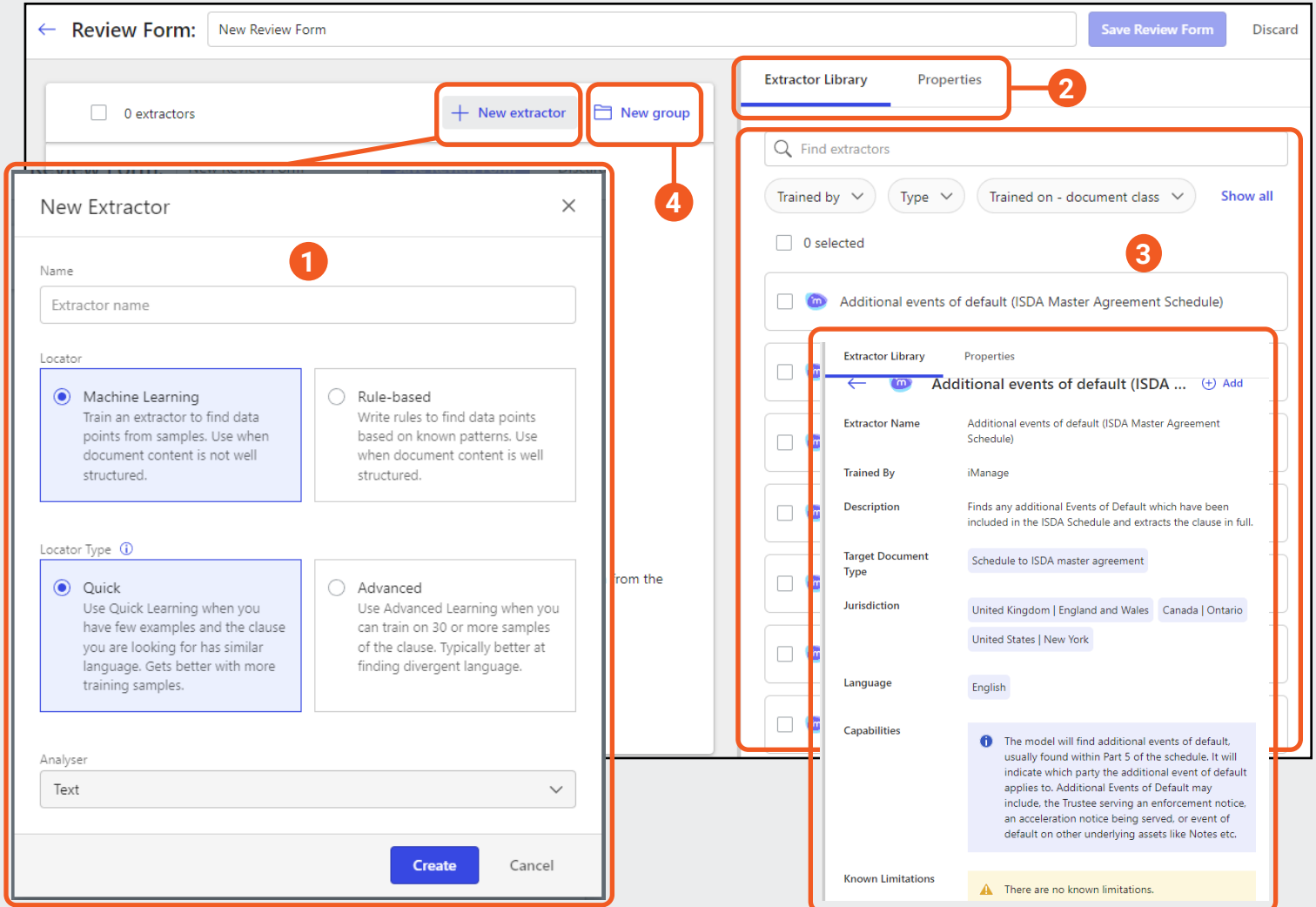
To create a new review form, select the **New Review Form** button. A new dialog box will appear where you can enter **Name** and **Properties** for the Review Form. You can also choose whether to add **pre-trained** extractors to the Review form or select to create a new extractor from scratch.

More on adding extractors on the next page.

NOTE: Only users with **Trainer** or **Superuser** role can perform the tasks described here.

Creating Review Forms and Extractors (continued)

You can either add a **pre-trained** extractor from the **Extractor Library** to your Review Form or select **New Extractor** to create an extractor from scratch.



The screenshot shows the 'Review Form: New Review Form' interface. At the top right are 'Save Review Form' and 'Discard' buttons. Below the title bar, there are two buttons: '+ New extractor' (highlighted with a red box and number 4) and 'New group'. A modal window titled 'New Extractor' is open, showing a 'Name' field (highlighted with a red box and number 1), a 'Locator' section with 'Machine Learning' (selected) and 'Rule-based' options, a 'Locator Type' section with 'Quick' (selected) and 'Advanced' options, and an 'Analyser' dropdown set to 'Text'. At the bottom of the modal are 'Create' and 'Cancel' buttons. In the background, the 'Extractor Library' is visible, showing a search bar and filter options (highlighted with a red box and number 3). A specific extractor is selected, showing its 'Properties' tab (highlighted with a red box and number 2). The properties include: Extractor Name, Trained By (iManage), Description, Target Document Type, Jurisdiction, Language, Capabilities, and Known Limitations.

1. New Extractor

Select **Create New Extractor** to create an extractor from scratch. Dialog windows opens where you can **Name** the extractor, choose either **Machine Learning** or **Rules-based** extractor type, choose between **Quick** or **Advanced Learning** Locator Type if you have selected Machine Learning and finally select an **Analyser** from the drop-down list.

2. Extractor Library and Properties

You select, add and view the details of any of the hundreds available **pre-trained extractors**. Here, you can also find any internal Review Forms that have been exported to the **Global Library**. From the **Properties** tab, you can give **description** to your Review Form.

3. Pre-Trained Extractors

When browsing for a pre-trained extractor, you can view **details** and more information about how pre-trained extractors have been trained and what they'll find as well as their **limitations**.

You can **filter** out extractors based on document **types**, **classes** or if it was created by iManage or your internal organisation.

3. Groups

A **group** is a collection of extractors that are connected by a common theme. For example, if the extractors are *PartyA* and *PartyB*, group could be *Parties*. To add a group, select **New Group**.