

ViewpointTM Document Cloud Services Guide

Application Version: 7.8.5
August 19, 2026

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Document Version: 1.3 (October 2025).

Document Conventions

Convention	Explanation
Bold	For file names, commands, fields, menus, options, and window names.
Courier New	Commands as you should type them.
Lucida Console	Example output generated by the system.
Italics	For configuration variables, including variable portions of file names and URLs. Also indicates a document name.
Note / Blue Callout	The Blue Callout text indicates information that is of special interest or importance, an idea that could be useful or additional information about a product or a feature.
	The Caution icon along with the text indicates actions that can lead to problems in system operation or configuration settings if the instructions are not followed properly.

Document Revision History

This section tracks the initial creation of the document after each major version thereafter.

Ver :	Date	Description	Reviewed / Approved By
1.0	Sep 12, 2023	Initial Version	Team
1.1	Nov 9, 2023	Removed Translation Service Class Name	Viewpoint Team
1.2	Oct 3, 2025	Updated Transcription config points	Viewpoint Team
1.3	Oct 27, 2025	Added Summarization	Viewpoint Team

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1. Overview

Viewpoint is capable of performing advanced document features by leveraging microservices in the Microsoft Azure cloud. Microsoft Azure offers a variety of pay-per-use features such as:

- Sentiment Analysis (document 'tone')
- Named Entity Recognition (NER)
- Translation
- Transcription (Speech-to-Text)
- Summarization

To use these features you will need to have a Microsoft Azure account. Viewpoint tracks service usage (number of documents, number of words translated, etc.) however it does not provide billing; rather it provides Reports which show the metrics that Microsoft uses as part of their billing calculations. Viewpoint does not track billing.

2. Azure Basics

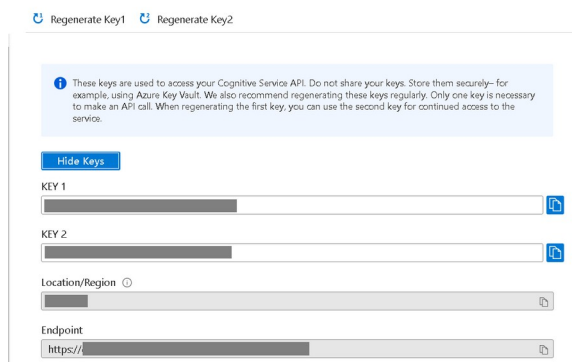
Azure is a Microsoft hosted cloud service. Microsoft owns Azure and is responsible for the quality of its service. Microsoft offers various billing tiers, including introductory free services (at the time of this writing). Select the service which is right for your organization. This Guide assumes you already have a Microsoft Azure Subscription and are familiar with how to access the Microsoft Azure Portal (website).

Viewpoint connects to Azure from its Workers, which will need HTTPS access to the appropriate Azure endpoint. No other Viewpoint applications directly access Azure.

3. Sentiment Analysis

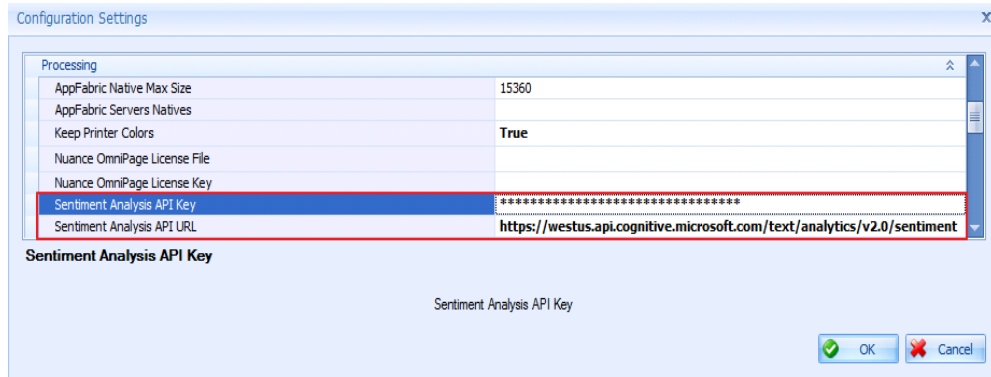
Follow these steps to configure Viewpoint to use Microsoft Azure Sentiment Analysis. Sentiment Analysis populates a Viewpoint Document field with a score from 0-100, with numbers closer to 100 being a more positive sentiment and numbers closer to 0 being a more negative sentiment. As with all Azure services, there may be fees associated this service. Additionally, your Workers must be able to access the Azure endpoint (web URL).

1. Log into your Microsoft Azure account using the Microsoft Azure web portal located at **portal.azure.com**
2. In the Microsoft Azure Portal locate and select Azure AI Services
3. Locate and select the service "Language Services"
4. Click "Continue to **create your resource**" it should be located at the bottom left of the screen.
5. Name the new service. You may use any name you would like, for example "ViewpointNER"
6. Select the appropriate Azure location (US East, etc.)
7. Select the appropriate Resource Group for your company
8. Click Create New. A new service will be created
9. Inspect the newly created service. Locate **Endpoint** and **Key1**. Note these two values - you will need them later in this Guide

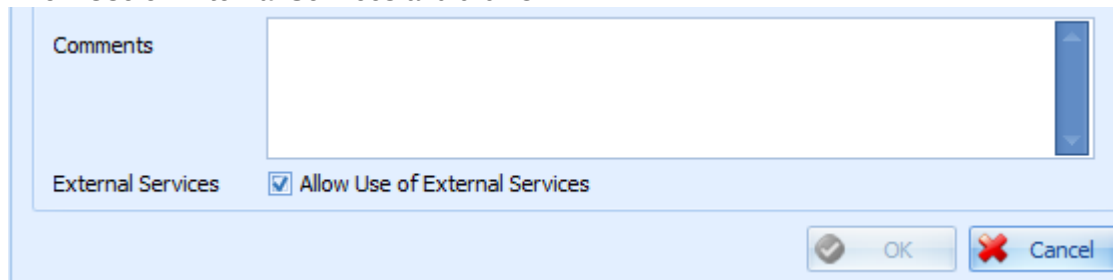


The screenshot shows the 'Keys and Endpoint' section of an Azure Cognitive Service resource. At the top, there are links for 'Regenerate Key1' and 'Regenerate Key2'. Below this is a warning box stating: 'These keys are used to access your Cognitive Service API. Do not share your keys. Store them securely - for example, using Azure Key Vault. We also recommend regenerating these keys regularly. Only one key is necessary to make an API call. When regenerating the first key, you can use the second key for continued access to the service.' A 'Hide Keys' button is located below the warning. The 'KEY 1' field is a text input with a copy icon to its right. The 'KEY 2' field is another text input with a copy icon to its right. Below the keys is the 'Location/Region' dropdown menu, which is currently set to 'US East'. The 'Endpoint' field is a text input showing 'https://', with a copy icon to its right.

10. Open Viewpoint Processing
11. Click the Configuration Settings button (on the Project tab)
12. Locate the Processing section. Paste the **Key1** value into the Sentiment Analysis API Key field. Paste the **Endpoint** value into the Sentiment Analysis API URL field -you may need to append "*endpoint*" to the end of the Endpoint value if it is not already there. Sample completed value:
`https://westus.api.cognitive.microsoft.com/text/analytics/v2.0/sentiment`



13. Click OK to save your changes
14. Open the PMC
15. In the Processing tab, select the Project(s) you would like to allow Sentiment Analysis. For each Project, right click the Project in the Dashboard, select Update, then Checkmark **Allow Use of External Services** and click OK



16. Restart each Viewpoint Worker
17. You may now begin to use the Sentiment Analysis service

Testing Sentiment Analysis

Sentiment Analysis is performed as part of the indexing task.

1. Open Viewpoint Processing, log in and select a Project
2. Select the Index tab
3. Select the Media(s) you want to index and analyze. In the Jobs Settings dialog, under the Miscellaneous section, set Analyze Email Sentiment to True. There is another setting a few rows down that controls a maximum file size that will be

sent for analysis.

Command Wizard

Job settings

Settings Set: Default

Enter text to search...

Only Index Non-Indexed Documents	False
Specify Metadata or Custom Fields to Index	(Collection)
Specify Phrases to Exclude from Indexing	(Collection)
Miscellaneous	
Analyze Email Sentiment	False
Maximum number of GPU modules for breaking if GPU breaking ena	0
Passwords Dictionary File Path	
Remove Restrictions from PDF Documents	False
Sentiment Text Max Size	2000
Use Full Email Address in HTML and Text Rendering	False
Use GPU for password breaking if available	False

☒ Show Advanced Settings

Process Next > Cancel

4. Complete the wizard by clicking the Process button
5. Once the task completes the Sentiment Analysis value will be populated in the emails in the selected source. To see the Sentiment value select the Process tab, locate the Documents you processed and open the Raw Data panel. You should see values between 1 and 100 in the **SentimentScore** property, under the EDocOperation section.

Raw Data

sentiment

No Parent

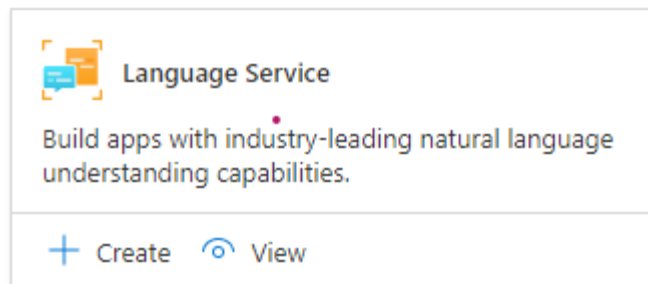
EDocOperation

SentimentScore	100
----------------	-----

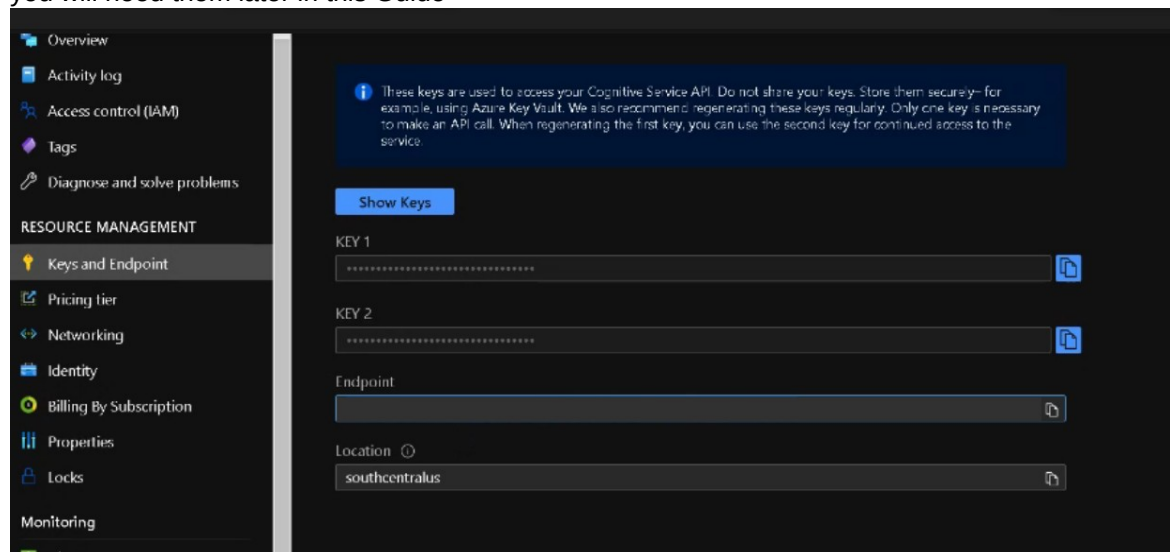
4. Named Entity Recognition (NER)

Follow these steps to configure Viewpoint Web to use Microsoft Azure NER (Named Entity Recognition) services, which is part of the EMS (Entity Management System) feature in Viewpoint Web. As with all Azure services, there may be fees associated this service. Additionally, your Workers must be able to access the Azure endpoint (web URL).

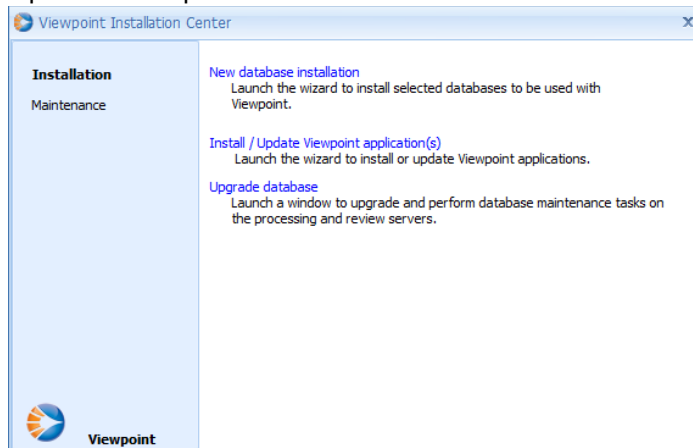
1. Log into your Microsoft Azure account using the Microsoft Azure web portal located at **portal.azure.com**
2. In the Microsoft Azure Portal locate and select Azure AI Services
3. Locate and select the service "Language Service"



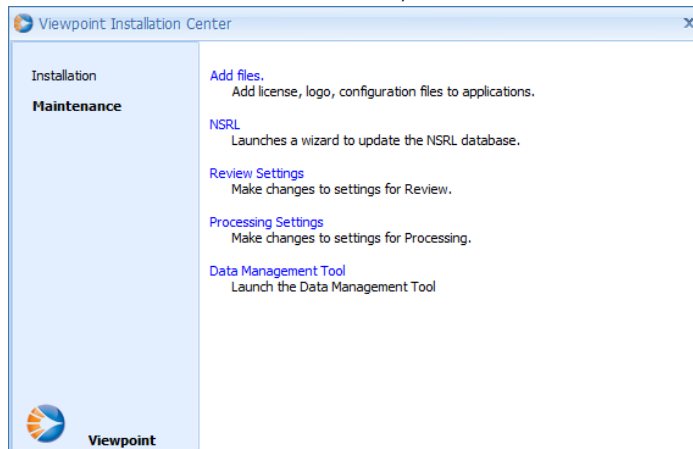
4. Click "Continue to **create your resource**" it should be located at the bottom left of the screen.
5. Name the new service. You may use any name you would like, for example "ViewpointNER"
6. Select the appropriate Azure location (US East, etc.)
7. Select the appropriate Resource Group for your company
8. Click Create New. A new service will be created
9. Inspect the newly created service. Locate **Endpoint** and **Key1**. Note these two values - you will need them later in this Guide



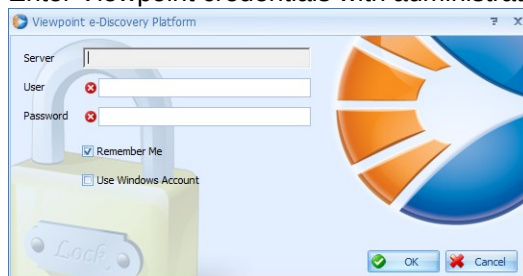
10. Open the Viewpoint installer



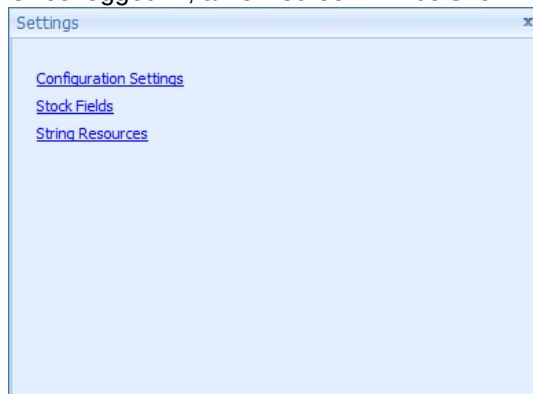
11. Click on the Maintenance section, then click on Review Settings



12. Enter Viewpoint credentials with administrator-level privilege and click OK



13. Once logged in, a new screen will be shown. Click on Configuration Settings



14. Locate the **Misc** section and locate the settings for **AzureNersEndPoint** and **AzureNersKey**

Configuration Settings

ETA Similarity Batch Size	50
ETA Max File Size Bytes	1000000
ETA Skip Empty Subject EMails	False
Maximum Depth Of Tree	1000
RootFoldersSemicolonDelimited	\\ldhfs03\QA\c\aaa;\\ldhfs01\qa\;\\ldhfs01\qa\QA TEAM\Vic...
SkipTextTreeBuildingSubjectInstanceCount	500

Misc

AzureNersEndPoint	
AzureNersKey	

ND Similarity Viewer

Build ND Minimum Coarse Threshold	85
Build ND Minimum Pairwise Similarity Threshold Percentage	90
Build ND workflow batch size	50
Build ND Workflow Garbage File Alphanumeric Threshold	5
Build ND Workflow Garbage File Test Chunk Size	1000
Build ND Workflow Max File Size	2000000
Build ND Workflow Min File Size	200
Build ND Workflow Required Free Memory Megs	200
Build ND Workflow skip fine comparison peer count threshold	500
Build ND Workflow Store Failed Comparisons Min File Size	100000
BuildNDTextCacheQueueLength	50

AzureNersKey

OK Cancel

15. Set the value for the **AzureNersEndPoint** property to the **Endpoint** value from Azure
16. Set the value for the **AzureNersKey** property to the **Key1** value from Azure
17. Click OK to save your changes
18. Restart all Viewpoint Workers
19. Restart Viewpoint Web
20. Start viewpoint Processing. Select the Project(s) you would like to allow Named Entity Recognition. For each Project, right click the Project in the Dashboard, select Update, then Checkmark **Allow Use of External Services** and click OK

Comments

External Services ☒ Allow Use of External Services

OK Cancel

21. You may now begin to process documents in the Viewpoint EMS system

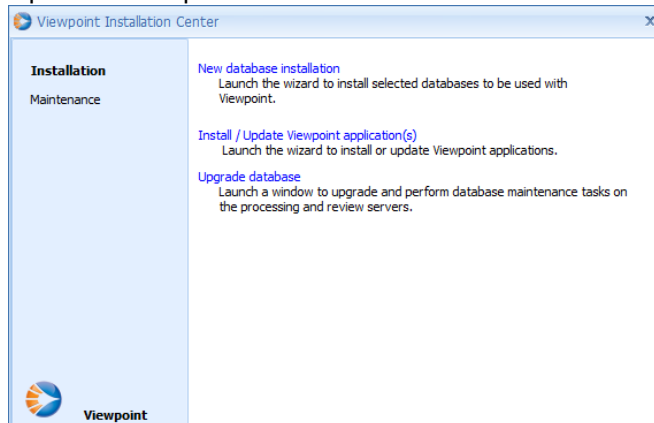
Testing NER

1. Open Viewpoint Web and login with a user with "Allow EMS Management" permission.
2. Select one of the projects which you have allowed Use of External Services
3. Navigate to the Entity Management System (EMS) page
4. Click the Entity Recognition button on the toolbar and complete the wizard. Viewpoint will utilize NER. If the process completes without error and produces Entities (in the EMS Page), the NER service has been properly configured.

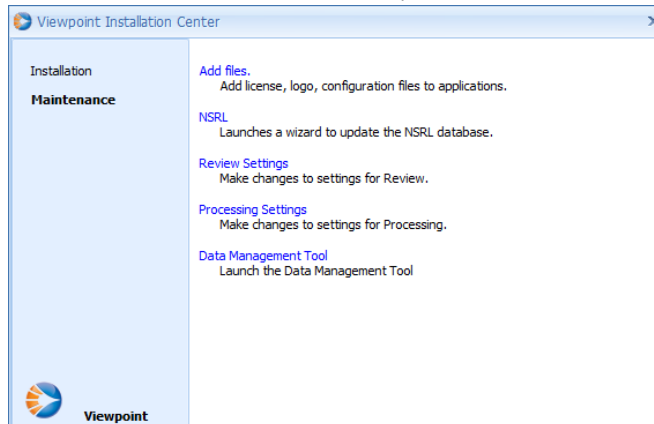
5. Translation

Follow these steps to configure Viewpoint to use Microsoft Azure Translation services. As with all Azure services, there may be fees associated this service. Additionally, your Workers must be able to access the Azure endpoint (web URL).

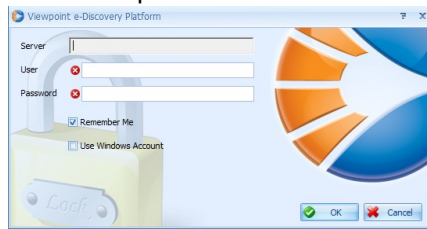
1. Log into your Microsoft Azure account using the Microsoft Azure web portal located at **portal.azure.com**
2. In the Microsoft Azure Portal locate and select Azure AI Services
3. Locate and select the service **"Translator"**
4. Click **"Continue to create your resource"** it should be located at the bottom left of the screen.
5. Name the new service. You may use any name you would like, for example "ViewpointTranslate"
6. Select the appropriate Azure location (US East, etc.)
7. Select the appropriate Resource Group for your company
8. Click Create New. A new service will be created
9. Inspect the newly created service. Locate **Endpoint** and **Key1**. Note these two values - you will need them later in this Guide.
10. Open the Viewpoint installer



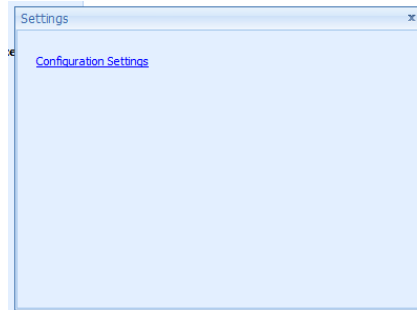
11. Click on the Maintenance section, then click on **Processing Settings**



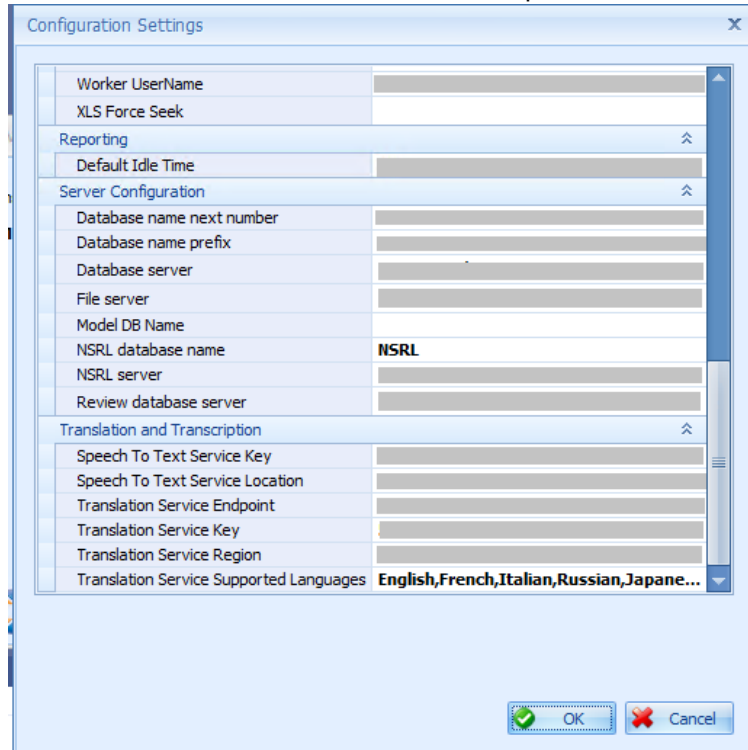
12. Enter Viewpoint credentials with administrator-level privilege and click OK



13. Once logged in, a new screen will be shown. Click on Configuration Settings



14. Locate the section 'Translation and Transcription'

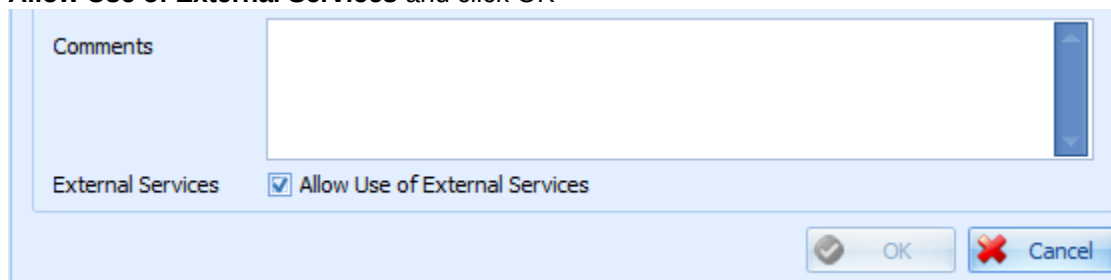


15. Enter the following values:

Configuration Settings	Value
Translation Service Endpoint	Enter the Endpoint value you obtained from Azure. Sample value: https://api.cognitive.microsofttranslator.com
Translation Service Key	Enter the Key1 value you obtained from

Azure	
Translation Service Region	Enter the Azure region identifier. For example: eastus2
Translation Service Supported Languages	Comma-separated list of language names. The list of the names of the languages that Azure Translator support can be found here: https://learn.microsoft.com/en-us/azure/ai-services/translator/language-support Sample value: English,French,Italian,Russian,Japanese

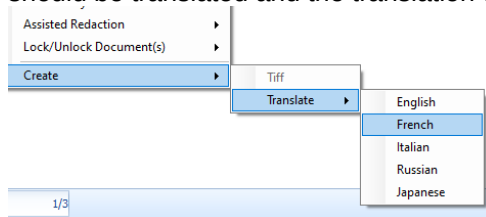
16. Click OK to save your changes
17. Restart all Viewpoint Workers
18. Restart Viewpoint Web
19. Start viewpoint Processing. Select the Project(s) you would like to allow Translation. For each Project, right click the Project in the Dashboard, select Update, then Checkmark **Allow Use of External Services** and click OK



20. You may now begin to perform Translations in Viewpoint

Testing Translation

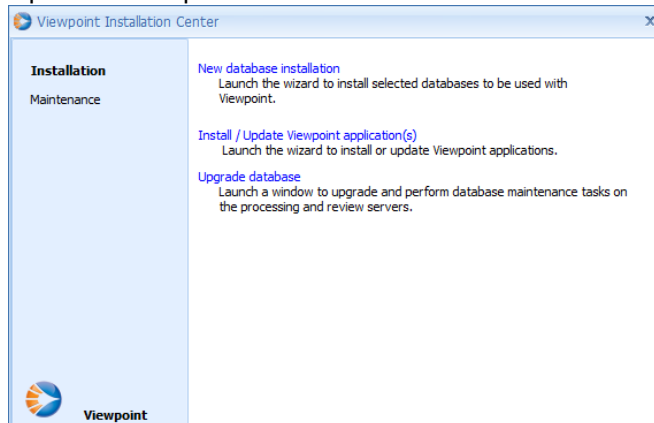
1. Open Viewpoint Classic Review
2. Select a matter which contains Documents which have text. Recommended: select a test matter, not a matter with customer data.
3. Click the Review button to open Linear Review
4. Select a Document which contains text
5. Ensure that at least one Viewer is open. Select "Text" in the Viewer's toolbar
6. Locate a Document which has been processed for text. Right-click the Document and select Create | Translate and then select a language. After a few moments the Document should be translated and the translation will appear in the Viewer.



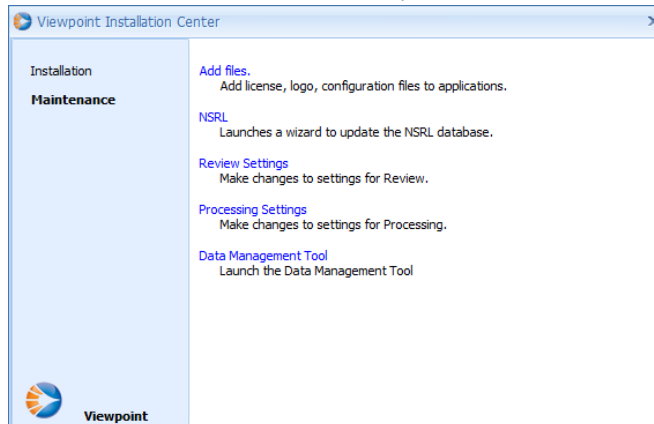
6. Transcription (Speech to Text)

Follow these steps to configure Viewpoint to use Microsoft Azure Transcription (Speech to Text) services. As with all Azure services, there may be fees associated this service. Additionally, your Workers must be able to access the Azure endpoint (web URL).

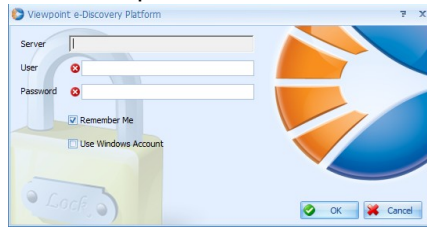
1. Log into your Microsoft Azure account using the Microsoft Azure web portal located at **portal.azure.com**
2. In the Microsoft Azure Portal locate and select Azure AI Services
3. Locate and select the service "Language Services"
4. Click "Continue to **create your resource**" **it should be located at the bottom left of the screen.**
5. Name the new service. You may use any name you would like, for example "ViewpointTranscription"
6. Select the appropriate Azure location (US East, etc.)
7. Select the appropriate Resource Group for your company
8. Click Create New. A new service will be created
9. Inspect the newly created service. Locate **Endpoint** and **Key1**. Note these two values - you will need them later in this Guide
10. Open the Viewpoint installer



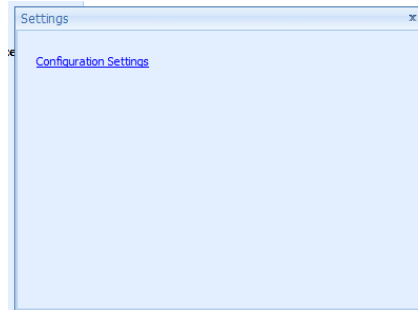
11. Click on the Maintenance section, then click on **Processing Settings**



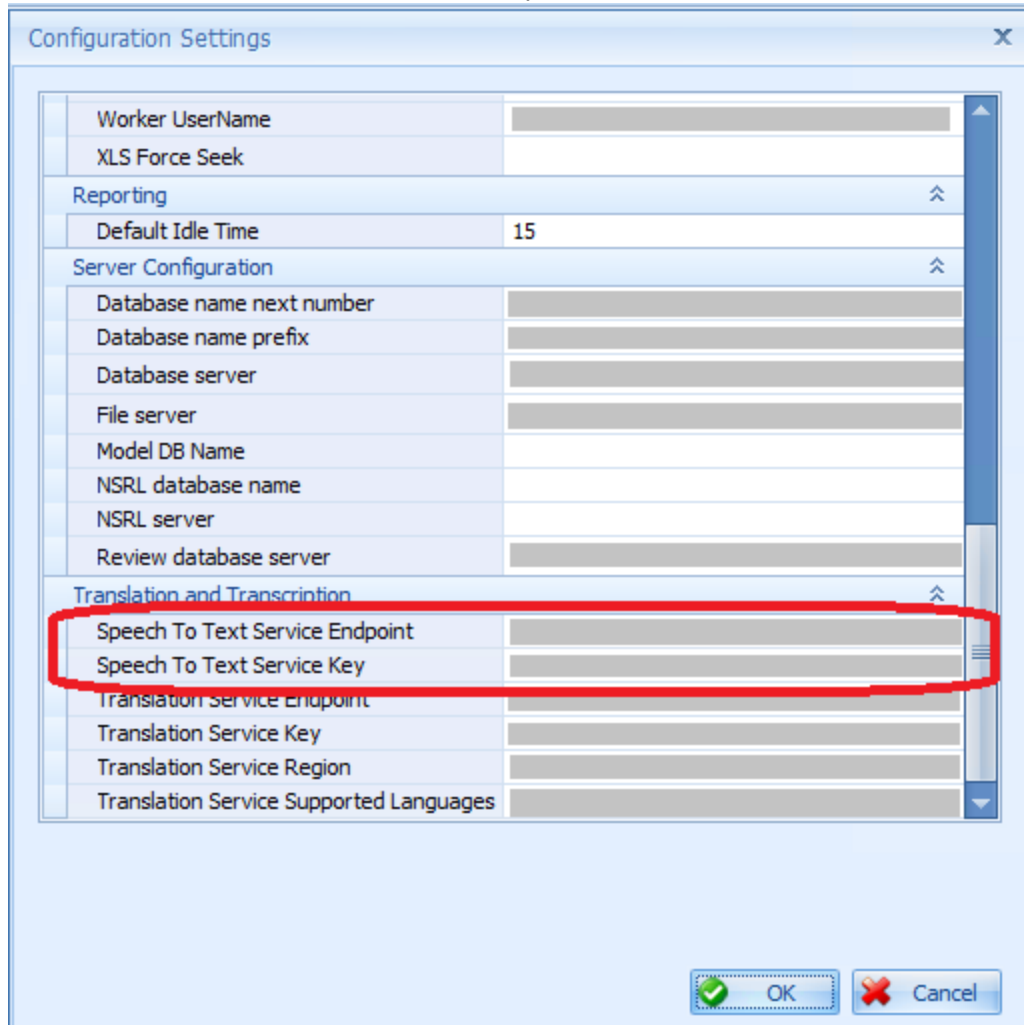
12. Enter Viewpoint credentials with administrator-level privilege and click OK



13. Once logged in, a new screen will be shown. Click on Configuration Settings



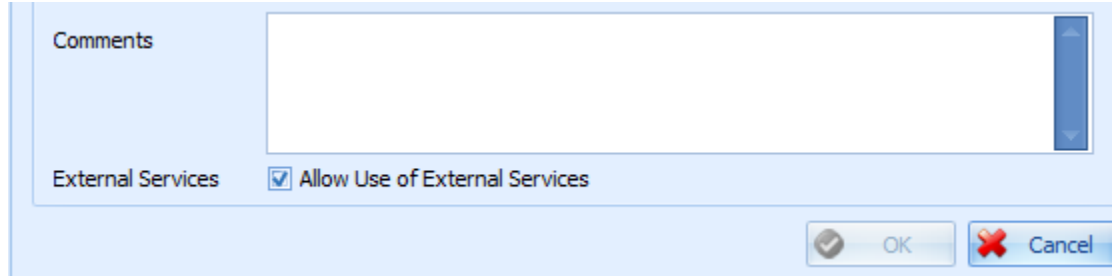
14. Locate the section 'Translation and Transcription'



15. Enter the following values:

Configuration Settings	Value
Speech To Text Service Endpoint	Enter the Endpoint value for the service. Example value: <code>https://eastus2.api.cognitive.microsoft.com/sts/v1.0/issuetoken</code>
Speech To Text Service Key	Enter the Key1 value you obtained from Azure

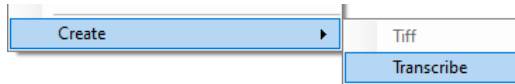
16. Click OK to save your changes
17. Restart all Viewpoint Workers
18. Restart Viewpoint Web
19. Start viewpoint Processing. Select the Project(s) you would like to allow Transcription.
For each Project, right click the Project in the Dashboard, select Update, then Checkmark **Allow Use of External Services** and click OK



20. You may now begin to perform Transcription in Viewpoint

Testing Transcription

1. Open Viewpoint Classic Review
2. Select a matter which contains Documents which have natives with spoken word content in MP3 or WAV format. Recommended: select a test matter, not a matter with customer data.
3. Click the Review button to open Linear Review
4. Select a Document which contains spoken word content in MP3 or WAV format. Right-click the Document and select Create | Transcribe. After a few moments the Document should be transcribed and the transcription will appear in the Viewer.



5. If these two processes successfully complete then the translation and transcription features are properly configured.

7. Summarization

Summarization can be performed either by the Llama 3 Large Language Model (“local”) or by Azure. Summarizations with Llama are performed directly on Viewpoint Workers and require significant resources, whereas Azure summarizations are performed by an Azure microservice in the Azure cloud.

You may choose to configure Viewpoint to use only Azure, only Llama, or both. You may only use one provider at a time, however. Changing the provider type requires a restart for all Viewpoint Workers.

Configuration will require the Viewpoint Installer application.

7.1. Configuring Summary - Azure

This Guide assumes you already have a Microsoft Azure Subscription and are familiar with how to access the Microsoft Azure Portal (website). Follow these steps to create an Azure Language Service and configure Viewpoint to use this service for Summarization.

Viewpoint Workers (only the Workers) communicate with Azure – this may require firewall rules or other network considerations.

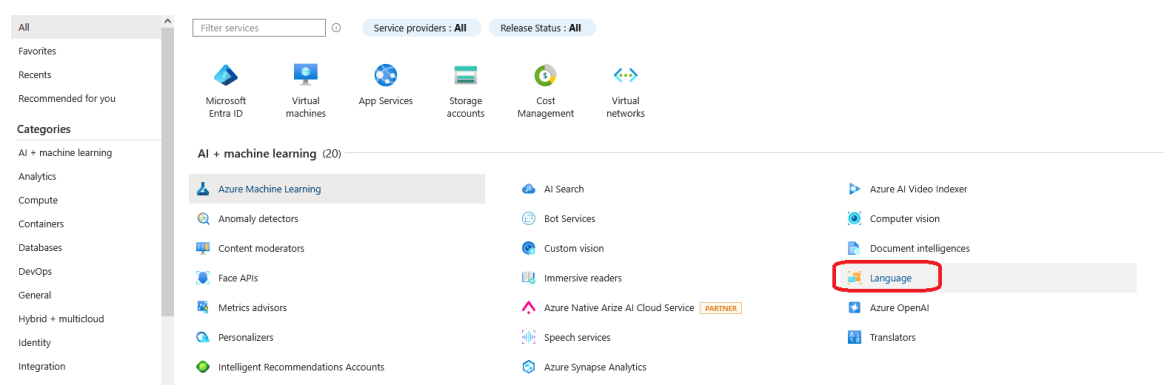
1. Log into your Microsoft Azure account using the Microsoft Azure web portal located at **portal.azure.com**
2. In the list of Azure Services locate and select App Services

Azure services



3. Locate and select the Language Service

All services



4. Select “Custom Question Answering”. Unselect “Custom text classification...”

Default features

- ✓ Sentiment analysis
- ✓ Key phrase extraction
- ✓ Pre-built question answering
- ✓ Conversational language understanding
- ✓ Named entity recognition
- ✓ Text Summarization
- ✓ Text analytics for Health

Custom features

- ✓ Custom question answering
Use this feature to answer user's questions over your data corpus. Requires Azure AI Search. [Learn more.](#)
Unselect
- ✓ Custom text classification, Custom named entity recognition, Custom sentiment analysis & Custom Text Analytics for health ⓘ
Use these customization features to tailor our products for your specific requirements. Requires Azure Storage. [Learn more.](#)
Select

5. Click **Create**
6. Select a name like “VP Summary”
7. Select the appropriate Subscription and Resource Group, if not already selected.
Select the appropriate Region.

Home > Azure AI services | Language service > Select additional features >

Create Language

Basics Network Identity Tags Review + create

Unlock insights from unstructured text using advanced natural language processing. Use sentiment analysis to find out what customers think of your brand. Find topic-relevant phrases using key phrase extraction and identify the language of the text with language detection. Detect and categorize entities in your text with named entity recognition.

[Learn more](#)

Project Details

Subscription * ⓘ

Resource group * ⓘ [Create new](#)

Instance Details

Region ⓘ

Name * ⓘ

Pricing tier * ⓘ

8. Click **Next**
9. Leave the Identity and Network Tabs unchanged, click **Next**
10. The new Language Service instance will be deployed.

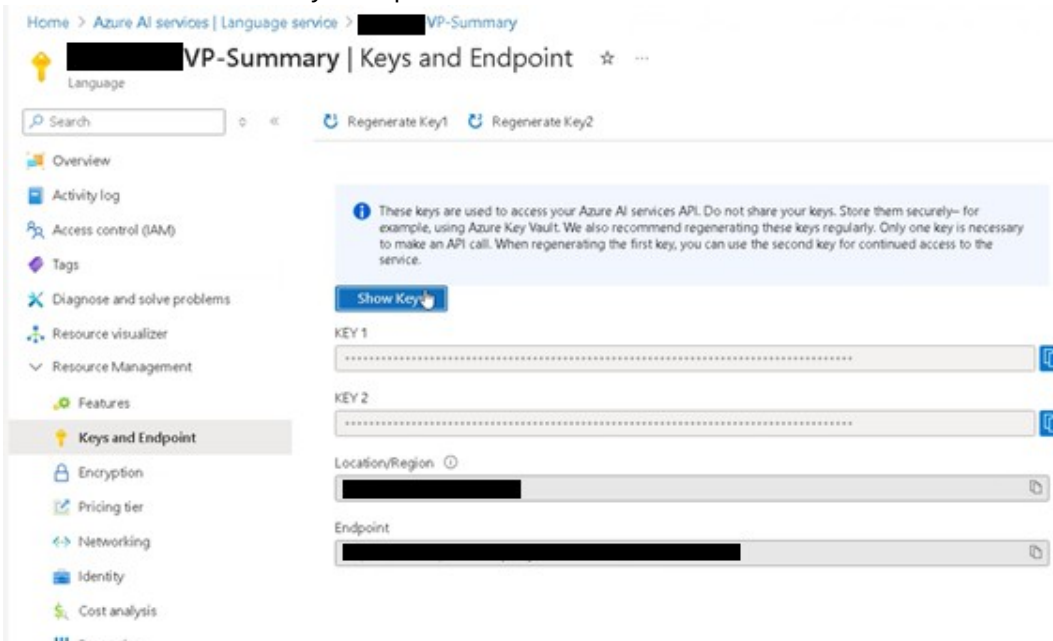
... Deployment is in progress

Deployment name :		Start time :	
Subscription :		Correlation ID :	
Resource group :			

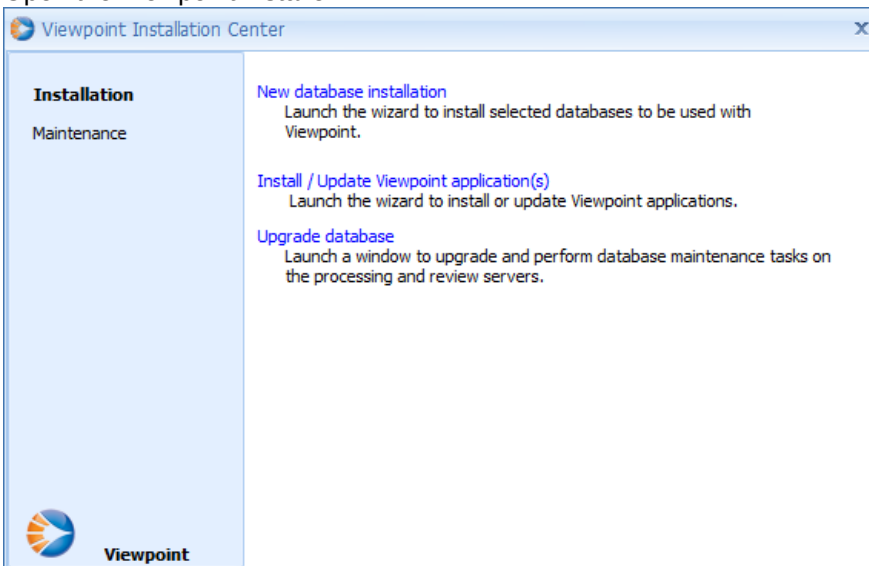
Deployment details

11. After a few moments you will be presented with a completion message. The Summary service is now initialized; Viewpoint will need to be told information about this service so that Viewpoint can utilize the service.
12. Click **Manage Keys**

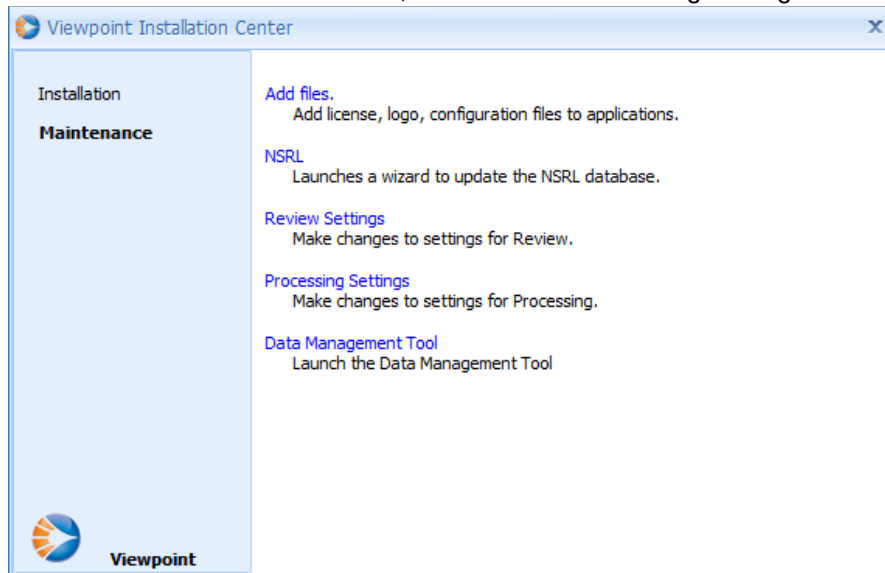
13. You will be presented with information about the Keys associated with this service. Note the values for the Key1 Endpoint



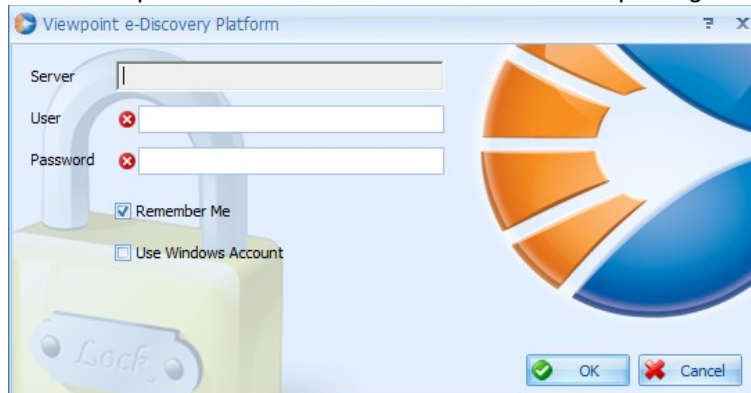
14. Viewpoint Workers will need to be able to access the Azure Summarization endpoint. Communication is over Port 443.
15. Open the Viewpoint installer



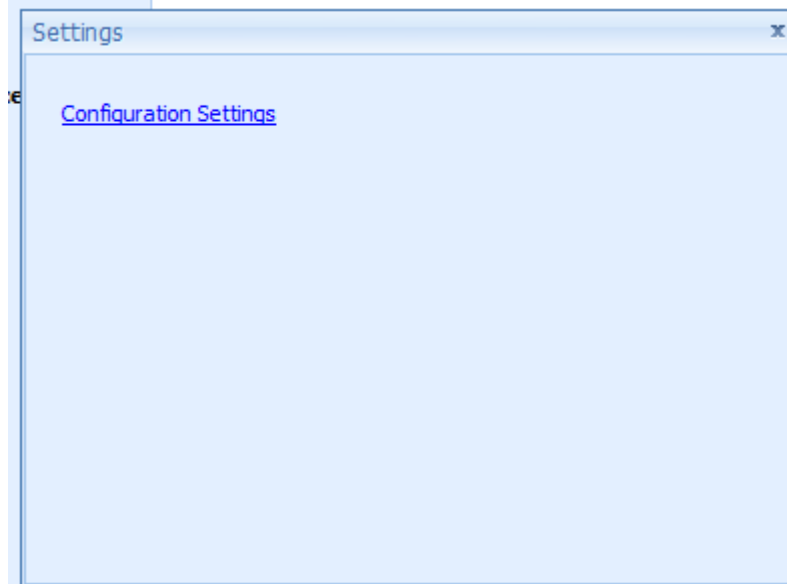
16. Click on the Maintenance section, then click on Processing Settings



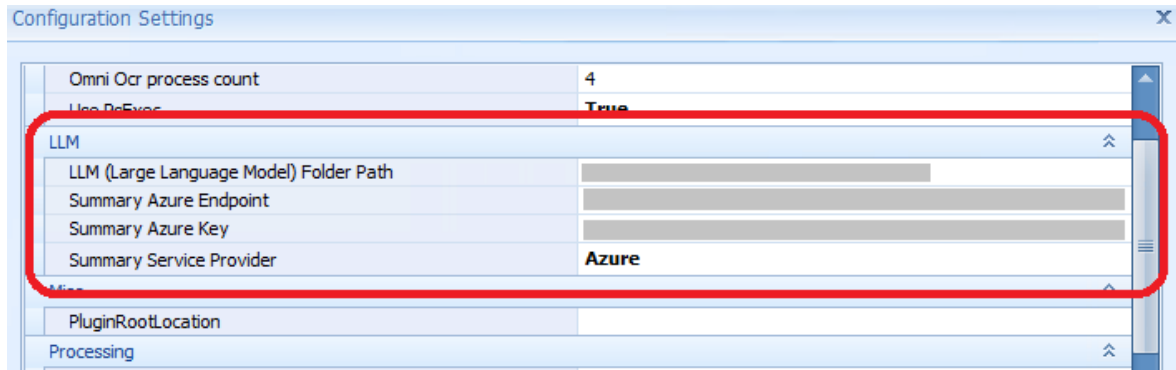
17. Enter Viewpoint credentials with administrator-level privilege and click OK



18. Once logged in, a new screen will be shown. Click on Configuration Settings



19. Locate the **LLM** section



20. Apply the following settings:

Configuration Settings Dialog	appSettings.Production.json
Summary Azure Endpoint	Populate this value with the Azure Summary Endpoint URL. It will look similar to: <code>https://YourServiceName.cognitiveservices.azure.com/</code>
Summary Azure Key	Enter the Key1 value for the Azure Summary Service. The key will be a long string of letters and numbers
Summary Service Provider	Azure

21. Click OK to save your settings
22. Restart all Viewpoint Workers
23. Restart Viewpoint Web

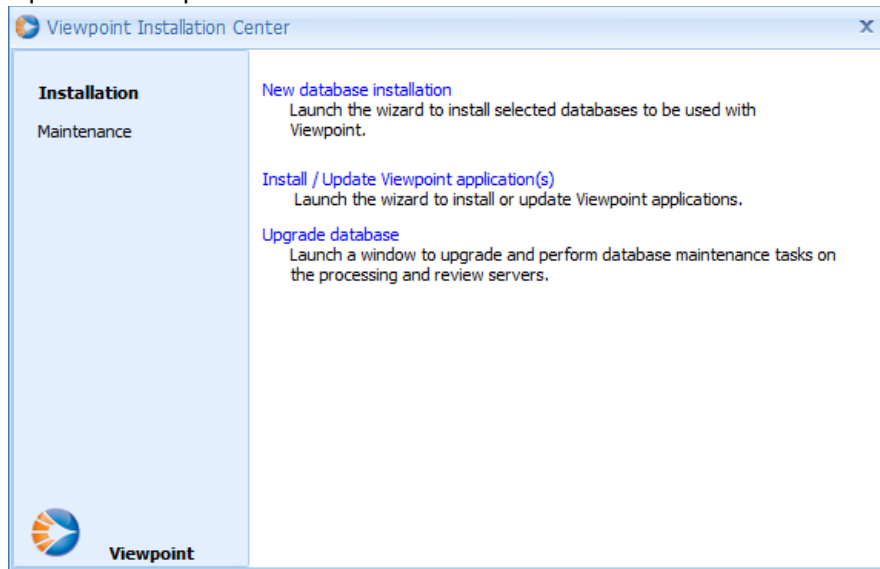
Proceed to the 'Testing Summary' section to test your configuration

7.2. Configuring Summary - Llama

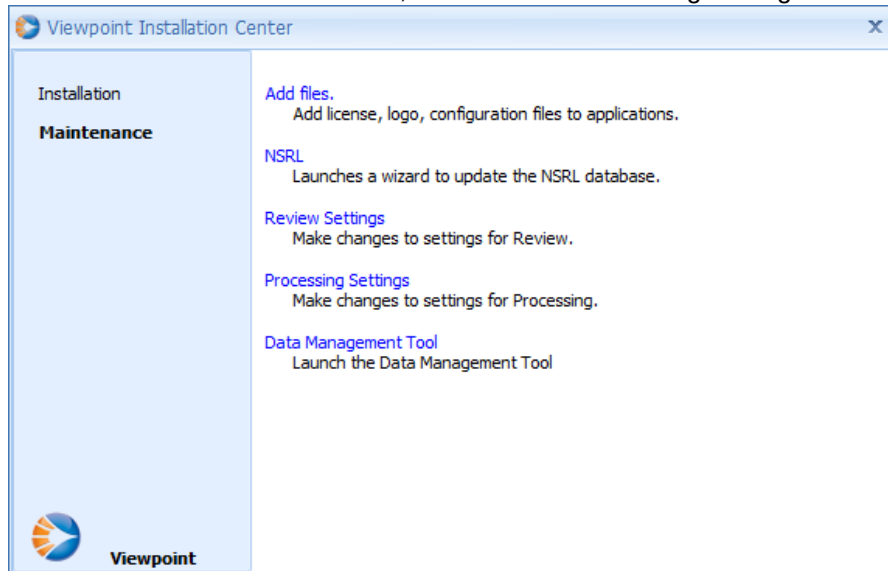
Viewpoint can perform Summarization using the free Llama 3 Large Language model. This process is performed on the Viewpoint Workers and is very computationally demanding. Conduent recommends a minimum of 8 CPU/Cores, 32 GB RAM and 250 GB of free HDD. Because the summarization occurs all on the Viewpoint worker the process can be very time consuming – consider these recommendations a minimum.

24. Acquire the Llama 3 model from Conduent. The filename is “**open-llama-3b-v2-wizard-evol-instuct-v2-196k.Q4_K_M.gguf**”
25. When the Summarization process is executed for the first time it will copy the model to the Worker. This model is about 2.5 gigabytes. Ensure that this amount of space is available on each worker.
26. Place the model file into a location where all Viewpoint Workers can access it. Note this location, it will be used later for configuration. Typically this will be a network drive.

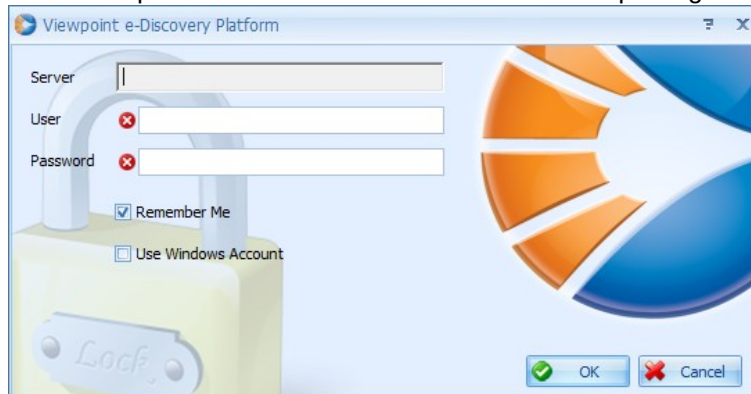
27. Open the Viewpoint installer



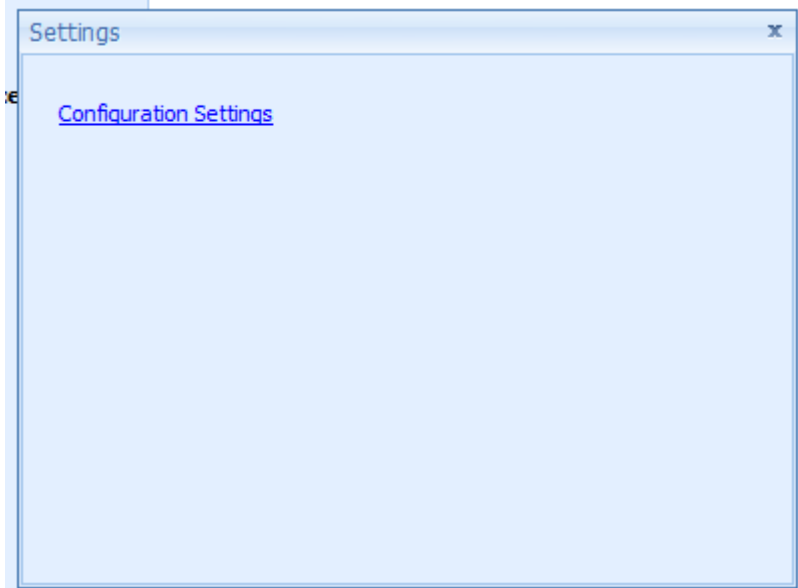
28. Click on the Maintenance section, then click on Processing Settings



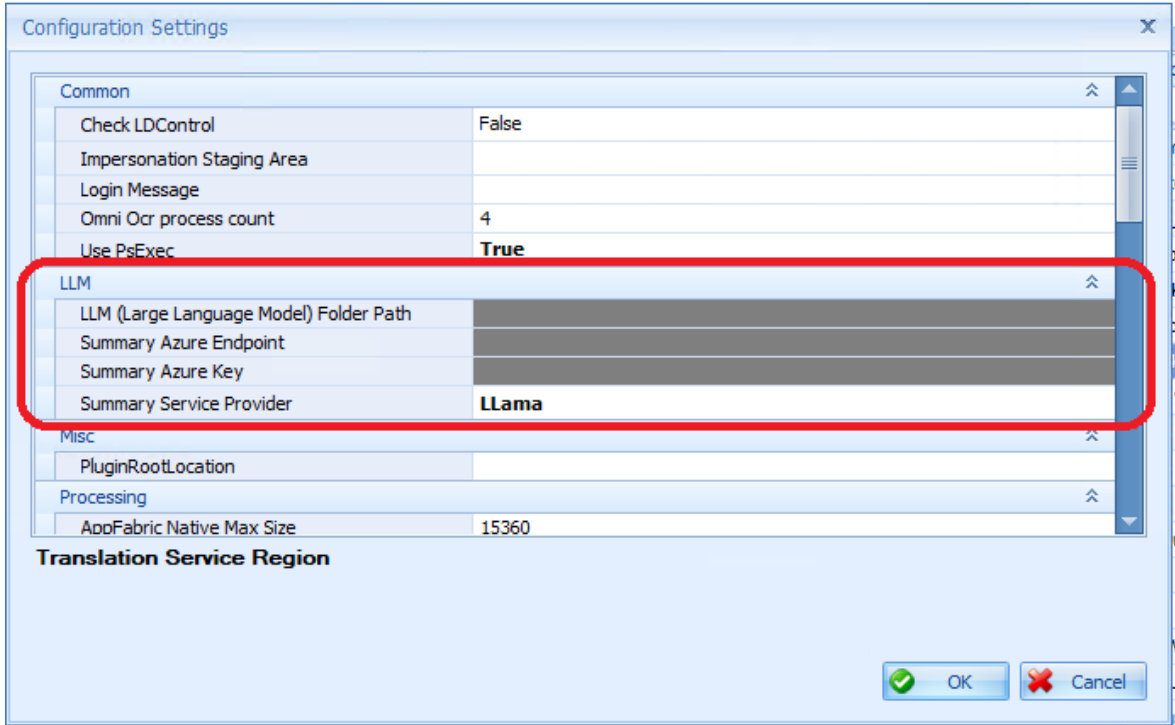
29. Enter Viewpoint credentials with administrator-level privilege and click OK



30. Once logged in, a new screen will be shown. Click on Configuration Settings



31. Locate the LLM section



32. Apply the following settings:

Configuration Settings Dialog	appSettings.Production.json
LLM (Large Language Model) Folder Path	Enter the full path of the Llama 3 model's folder, for example: \\Server\LLM\Model
Summary Service Provider	Llama

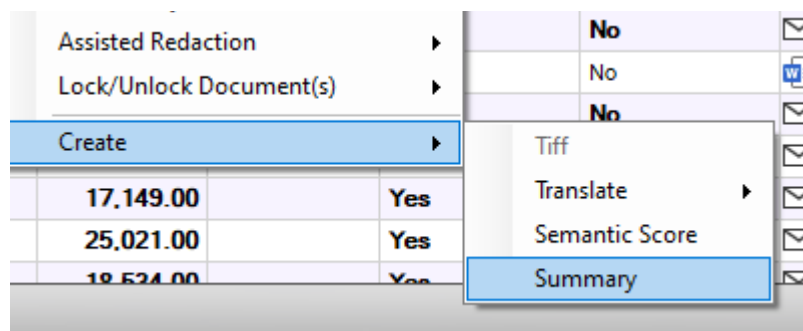
33. Click OK to save your settings
34. Restart all Viewpoint Workers
35. Restart Viewpoint Web

Proceed to the 'Testing' section to test your configuration

7.3. Testing Summary

To verify that the process is working, perform a summarization and verify that it completes successfully.

1. Open the Viewpoint PMC (Processing)
2. Locate a matter which contains Documents which have text. Select Documents which have at least 1000 words in its text file.
3. In the PMC Dashboard, right-click the Project and select 'Update'. At the bottom of the dialog, ensure that "Allow Use of External Services" is checked. If it is not, checkmark this option and click OK.
4. Determine which Summary provider you are testing – Llama or Azure. Open Configuration in the PMC and verify that the "Summary Service Provider" Configuration Point has been set to your target provider – if it is not, change it and then restart all Workers.
5. Close the PMC.
6. Open Viewpoint Classic Review
7. Grant the current user permission to "Allow Summary" (through the Security Manager) if they do not already have this permission.
8. Click the Review button to open Linear Review
9. Open the Summary Panel, so that you can see the results when they are produced
10. Select a Document which contains at least 1000 words in its text file
11. Right-click the document and select Create | Summary.



12. You will be prompted to select the style of the Summary. Make any selection and click OK
13. You will be shown a progress bar while the Summary is prepared. Azure Summarizations typically take a few seconds, Llama Summaries can take several minutes (based on hardware).

Once the process completes, observe the Summary panel – it should contain the selected Document's Summary