

Configuring Viewpoint™ Enhanced Review

Application Version: 7.8.7

August 19, 2026

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Document Version: 1.0 (February 2026).

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	Feb 27, 2026	Initial Version	Team
1.1	May 14, 2026	Addendum added	Gary Mau / Mark Thibodeaux
1.2	May 19, 2026	Google renamed Vertex AI to Agent Platform – GCP Configuration updated	Gary Mau

1. Overview

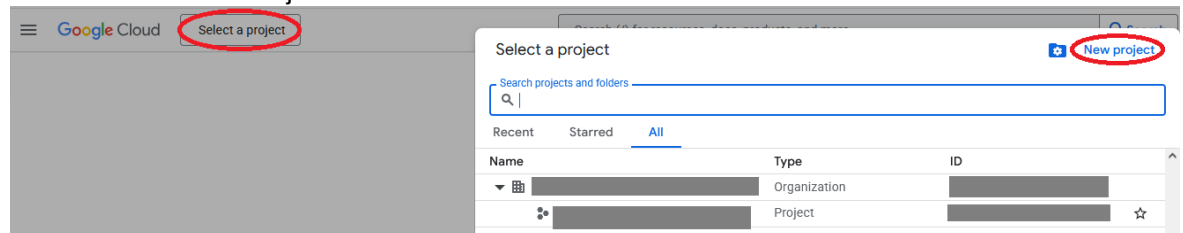
Viewpoint's new Enhanced Review functionality uses generative AI to analyze documents. Viewpoint leverages the Google Agent Platform to facilitate the analysis. Viewpoint Workers will need to be able to communicate with the Google Agent Platform API endpoint to perform this service (via HTTPS). Google Agent Platform API is a pay-per-use service.

Configuration will require the Viewpoint Installer application.

2. Configuration

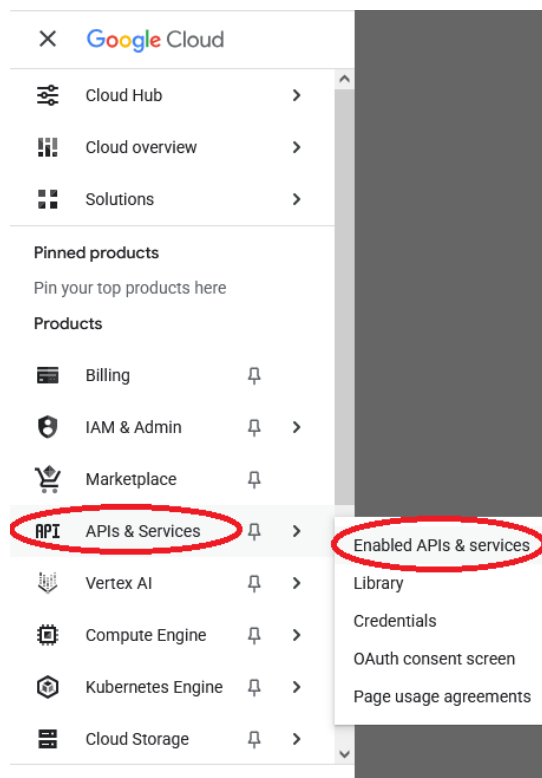
Creating and Configuring the Agent Platform API Service

1. Create or select an existing Google Account. The Google Agent Platform API Service will be associated with this Account. The Google Agent Platform API Service requires payment (to Google) to use.
1. Navigate to **console.cloud.google.com**
2. Log in as the user which will own the connection to the Agent Platform API (The Agent Platform API will be run on behalf of this user)
3. Select or create a Project. This Project will own the Agent Platform API Service instance. Use the “Select a Project” button and, if a new Project is needed, click the “New Project” link and create a new Project.

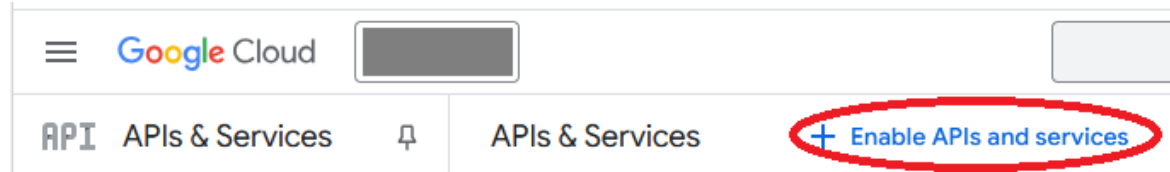


4. Some organizations disable service account API key creation via this policy:
iam.managed.disableServiceAccountApiKeyCreation = true
To be able to use this Project for Agent Platform API you will need to enable API Key Creation. If this applies to you, go to the **Enabled API Key Creation** section of this document before proceeding.
5. The Service Account will need to be assigned the **Agent Platform User** role. Locate the **IAM & Admin** section. Navigate to **Service Account** and select the Service Account. Under the Permissions tab. Click Add. In the Search text box, enter Agent Platform User and select that role and click **Save**.
6. Under the Navigation Menu (top-left) select **APIs & Services | Enabled APIs and Services**

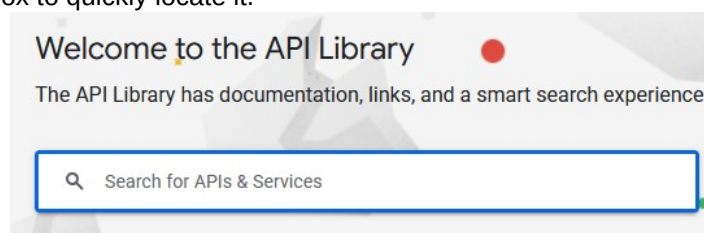




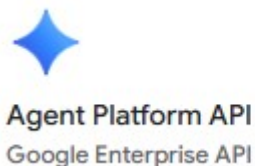
7. You will be presented with the APIs & Services Dashboard. Click “Enable APIs and Services”



8. You will be shown the list of all available API Libraries. Locate Agent Platform API search box to quickly locate it.



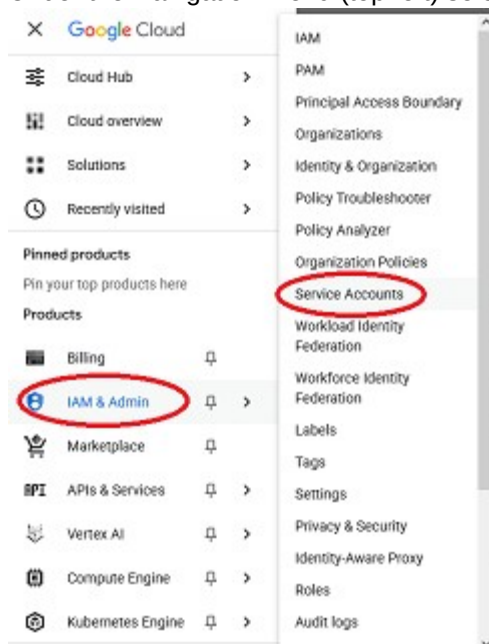
9. Select **Agent Platform API**



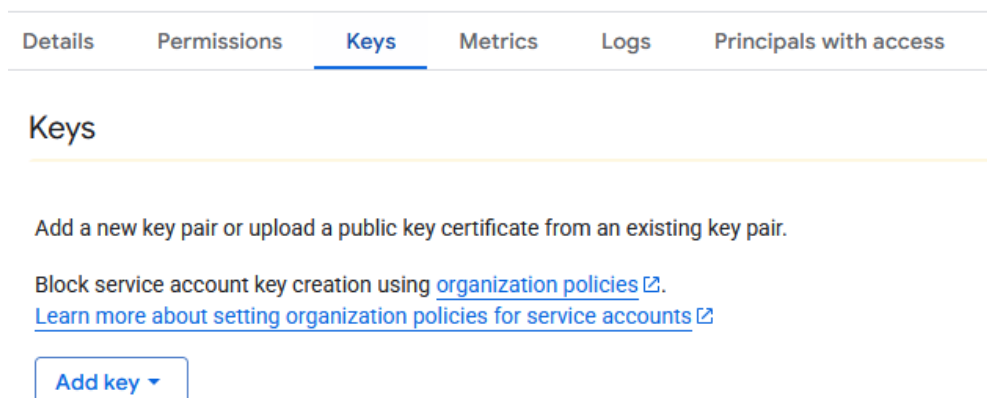
10. You will be shown the Product Details page for the Agent Platform API. Click the Enable button to enable the service.

11. After a few moments the service will become enabled.

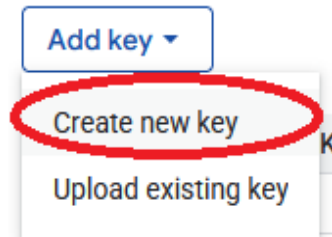
12. You will see the Agent Platform API service details. From here you can monitor usage, costs and configure security. The Agent Platform API is now ready to process requests, however it requires security configuration to be useable by Viewpoint. Note that you can disable the Agent Platform API if you so choose, however the Agent Platform API must be enabled for it to be useable by Viewpoint.
13. Next you will need to create the credentials which Viewpoint will use to access the service. Under the Navigation Menu (top-left) select **IAM & Admin | Service Accounts**



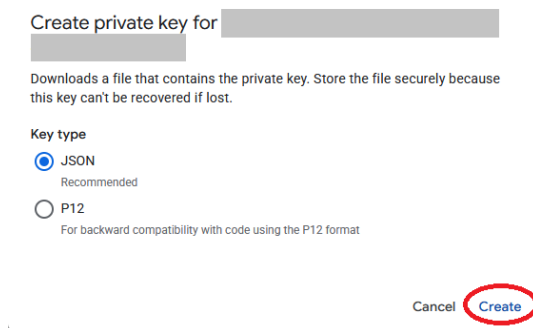
14. Establish a Service Account
15. Once you have established a Service Account, you will need to produce a Service Account Key File. Select the Service Account and then select the Keys tab



16. If you do not already have a Key File for this Service Account, click **Add key | Create new key**



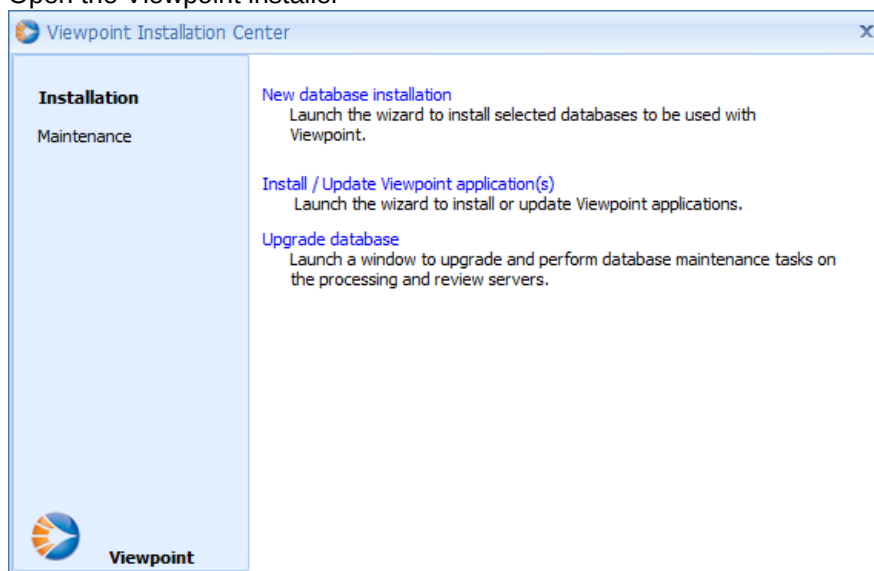
17. You will be prompted to select the type of key. Select JSON and click Create.



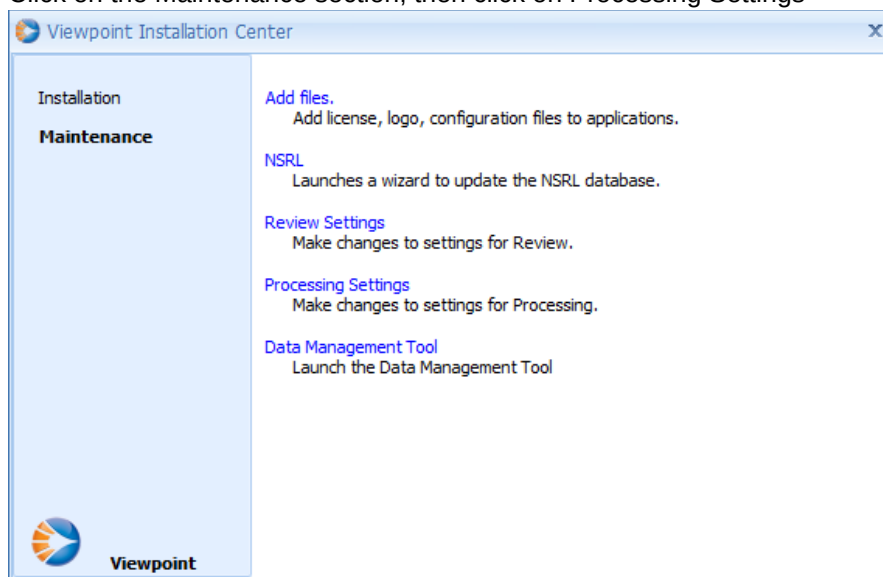
18. Place the JSON file in a secure location – if you lose this file you will need to create a new Key File. This Key File allows access to the Agent Platform API service on behalf of this Service Account – do not share this file, keep it safe. You will be using this JSON content later in the process to populate the Viewpoint Configuration point “Google Vertex Json Key”.
19. You now have an enabled service and the credentials to access it. The next step is to configure Viewpoint to point to these assets.

Configuring Viewpoint to use the Agent Platform API Service

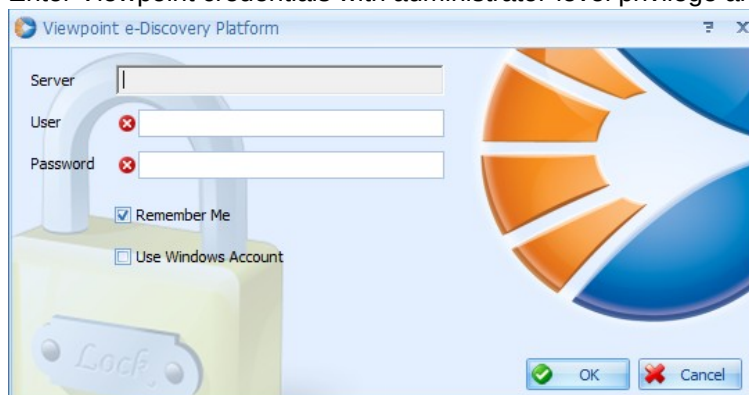
1. Open the Viewpoint installer



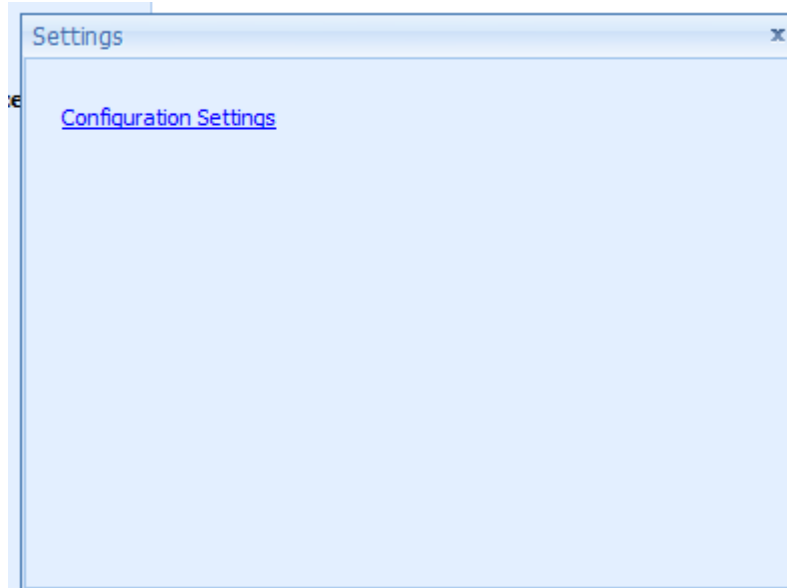
2. Click on the Maintenance section, then click on Processing Settings

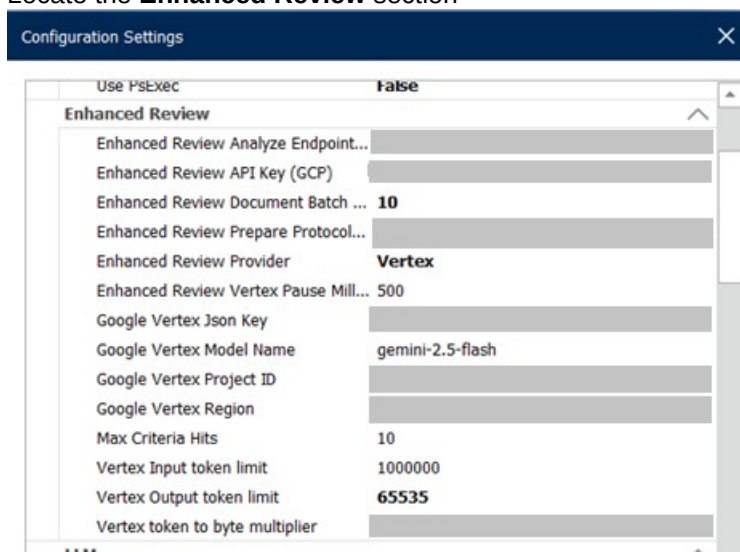


3. Enter Viewpoint credentials with administrator-level privilege and click OK



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



5. Locate the **Enhanced Review** section

6. Apply the following settings:

Configuration Settings Dialog	appSettings.Production.json
Enhanced Review Analyze Endpoint (GCP)	Deprecated
Enhanced Review API Key (GCP)	Deprecated
Enhanced Review Document Batch Size (GCP)	Deprecated
Enhanced Review Prepare Protocol Endpoint (GCP)	Deprecated
Enhanced Review Provider	Set this to Vertex , otherwise leave it as None (indicating no Enhanced Review provider)
Enhanced Review Vertex Pause Milliseconds	Used to throttle Enhanced Review requests to Vertex to avoid overwhelming Vertex
Google Vertex Json Key	Full JSON text, acquired from the Google website during setup. This content is typically several lines of JSON, including elements like 'project_id' and 'private_key'. This value is stored encrypted.
Google Vertex Model Name	Google Vertex Model. Note that changing models may require that other settings, such as region, input token limit and output token limit may need to change, varies by model. Sample value: gemini-2.5-flash
Google Vertex Project ID	Google Vertex Project ID

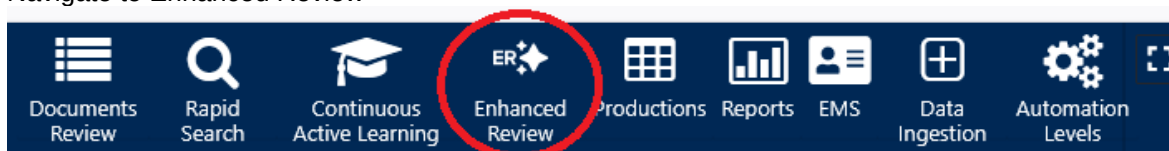
Google Vertex Region	Google Vertex Region – example: us-central1
Max Criteria Hits	Maximum number of hits per Criteria to return from Google Vertex
Vertex Input Token Limit	Expected Vertex Input Token Limit – Viewpoint will limit the size of requests by this amount. Varies by model.
Vertex Output Token Limit	Used to limit response content length from Vertex
Vertex token to byte multiplier	Heuristic to estimate the ratio of characters to Vertex tokens.

7. Click OK to save your settings
8. Restart all Viewpoint Workers
9. Restart Viewpoint Web
10. Proceed to the 'Testing' section to test your configuration

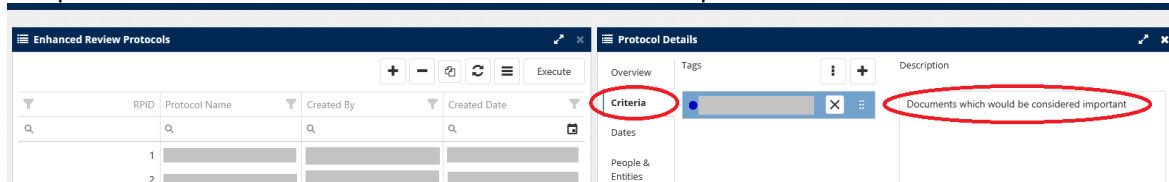
3. Testing

To verify that the process is working, execute a small Enhanced Review job and verify that it completes successfully.

1. Open the Viewpoint PMC
2. Locate or create a test 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. Close the Viewpoint PMC
5. Open Viewpoint Classic Review. Open the Security Manager and configure your user to have permissions "Manage Enhanced Review Protocols" and "Execute Enhanced Review Protocols".
6. Close Viewpoint Classic Review
7. Log into Viewpoint Web and select the Project that was selected earlier in this process
8. Navigate to Enhanced Review



9. Create a new Enhanced Review protocol with at least one Criteria. Sample text for a sample Criteria "Documents which would be considered important"



10. Click the Execute button to start the Enhanced Review wizard



11. Select a View with at least one document with text in it, click Next. Click Next again. Click **Finish** to begin the process.
12. A job progress dialog will appear. After a few moments, depending on the volume of data, the job will complete. If the process completes without error then the service has been configured properly.

4. Enabling API Key Creation

If your organization does not allow you to create API keys, follow these steps to enable API key creation:

Option A: Console (Org Admin Required)

- 1. Go to **IAM & Admin** → **Organization Policies**.
- 2. Find

 Active	Block service account API key bindings	iam.managed.disableServiceAccountApiKeyCreation	Managed	Override parent's policy
--	--	---	---------	--------------------------

- 3. Select the policy iam.managed.disableServiceAccountApiKeyCreation.
- 4. Click **Edit** → **Set to False** (allow key creation).

 Edit policy

Block service account API key bindings

When enforced, disables creation of API Keys bound to service accounts.

Applies to

Project "prj-dev-er2"

Policy source

- ☐ Inherit parent's policy 
- ☐ Google-managed default 
- ☒ Override parent's policy 

Rules

Organization policy rules define the values to be enforced by a constraint. You can turn the constraint's enforcement on or off within a rule.

Any rule can be made conditional based on Tags by clicking Add condition. This allows you to fine-tune the enforcement of your organization policy. [Learn more about policy conditions](#) .

 Edit rule 

Enforcement

☐ On

☒ Off

Add condition

Done

Add a rule

Set policy



Cancel

5. Set policy and save.

Option B: gcloud CLI

```
gcloud org-policies allow iam.managed.disableServiceAccountApiKeyCreation \  
--organization=YOUR_ORG_ID
```

Enable the Vertex AI API

1. Go to **APIs & Services** → **Library**.
 2. Search **Vertex AI API**.
 3. Click **Enable**.
-

Create a Service Account

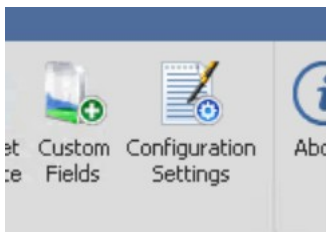
1. Go to **IAM & Admin** → **Service Accounts**.
2. Click + **CREATE SERVICE ACCOUNT**.

5. Addendum

Until a fix is released, the below workaround is required to configure ER to use a GCP endpoint.

Update both the Enhanced Review and Summary configuration points. They need to be the same as there is a coding issue where Enhance Review is picking up the Summary key.

The configurations can be found in the PMC by clicking on the Configuration Settings in the Project tab.



The Vertex Project ID is your project name (proj-prod-er for example)

Enhanced Review Configurations

Google Vertex Json Key	{
Google Vertex Model Name	gemini-2.5-flash
Google Vertex Project ID	prj-prod-er
Google Vertex Region	us-central1

Summary Configurations

Summary Vertex Input token limit	1000000
Summary Vertex Json Key	{
Summary Vertex Model	gemini-2.5-flash
Summary Vertex Output token limit	65535
Summary Vertex Pause Milliseconds	500
Summary Vertex Project ID	prj-prod-er
Summary Vertex Region	us-central1
Summary Vertex token to byte multi...	1