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01. BUSINESS INTELLIGENCE IMPROVEMENTS

It is now possible to export visualizations and sheets for any **Business Intelligence Dashboard**. Short-cut commands are also available to simplify duplicating an entire sheet for customization, publishing a custom sheet and deleting a custom sheet.

Right-click on an individual chart, or visualization, for options to export it to PDF or an image file.


A dialog box is presented to allow for customization of the export. The options offered depend on whether PDF or image output is specified.

Entire sheets can be exported to PDF format. Simply click the menu button in the **Dashboard** header and select **Export sheet to PDF.**

This menu also now offers an option to duplicate sheets, making customization of whole sheets quicker and easier.

If a custom sheet is currently active in the **Dashboard**, additional shortcuts to publish or delete the sheet are newly available in this menu.
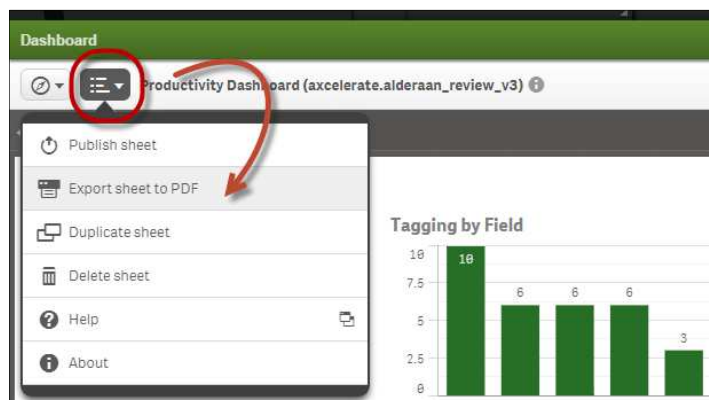
02. EFFICIENCY SCORE DASHBOARD

A new Business Intelligence dashboard is available to Case Managers via the **Business Intelligence** link on the **Matter List.** The **Efficiency Score Dashboard** provides powerful cross-matter metrics on cull rates, data set responsiveness and the efficacy of various prioritization approaches.
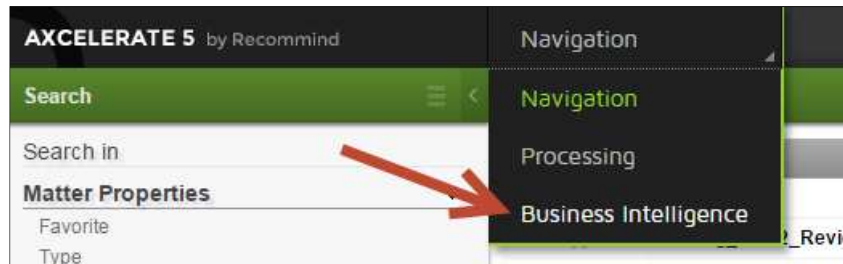

The **Efficiency Score Dashboard** is equipped with pre-configured Sheets that can be quickly adjusted to specific criteria as desired.

Sheet #1 - Efficiency Overview

Data Reduction Summary: Funnel graph depicts reduction of data that requires eyes-on review. Starting at the wide end of the funnel, you see the total pool of documents ingested. The subsequent reduction in volume via ECA culling strategies, removal of duplicate documents in the publish process and prioritization strategies applied in the Review & Analysis project is shown as the funnel narrows. The greater the difference in the initial number of documents ingested vs. the total confirmed to the target Workflow, the more efficient the review strategy.

Efficiency of Review Effort: A bar chart that illustrates overall efficiency based on the overall confirmation rate; gives an indication of how many documents require eyes-on review to find a truly responsive one. A higher percentage means fewer documents need human review and thus indicate an efficient review strategy.

Efficiency by Prioritization Technique: This chart helps understand the overall efficiency of the review effort. Each bar represents the various strategies deployed to identify potentially relevant documents, which are added to the target Workflows in each matter and used to batch out documents.
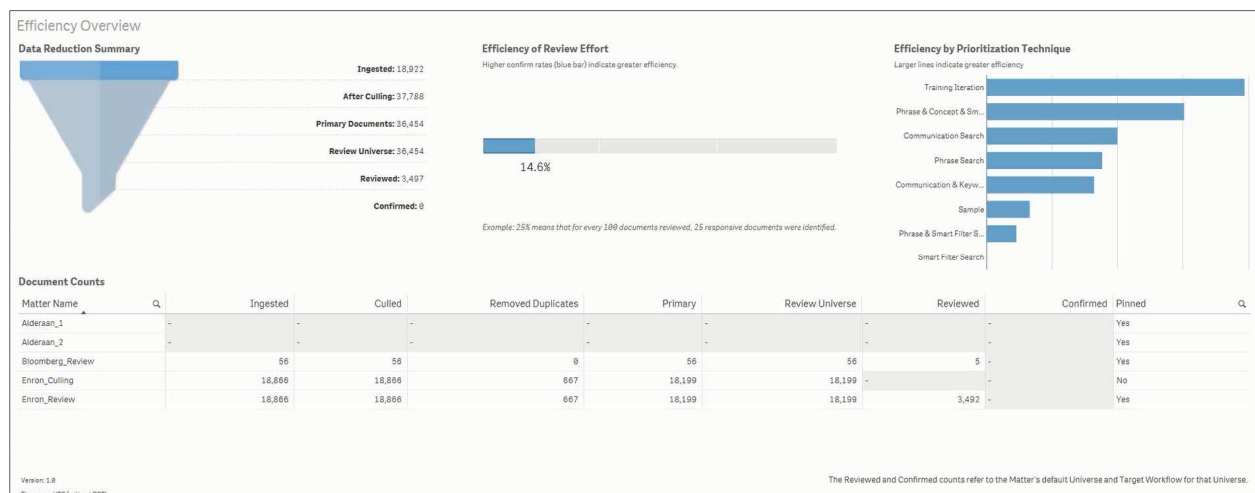
Sheet # 2 - Finding Boosters

The Boost Rate is the confirmation rate of a single prioritization technique divided by the overall confirmation rate of the entire Review Workflow. Boosters, then, are prioritization strategies that yield better than average confirmation rates when compared with other techniques. The **Finding Boosters** sheet provides a graphical survey of the prioritization techniques to help Case Managers understand which techniques are more, or less, efficient.
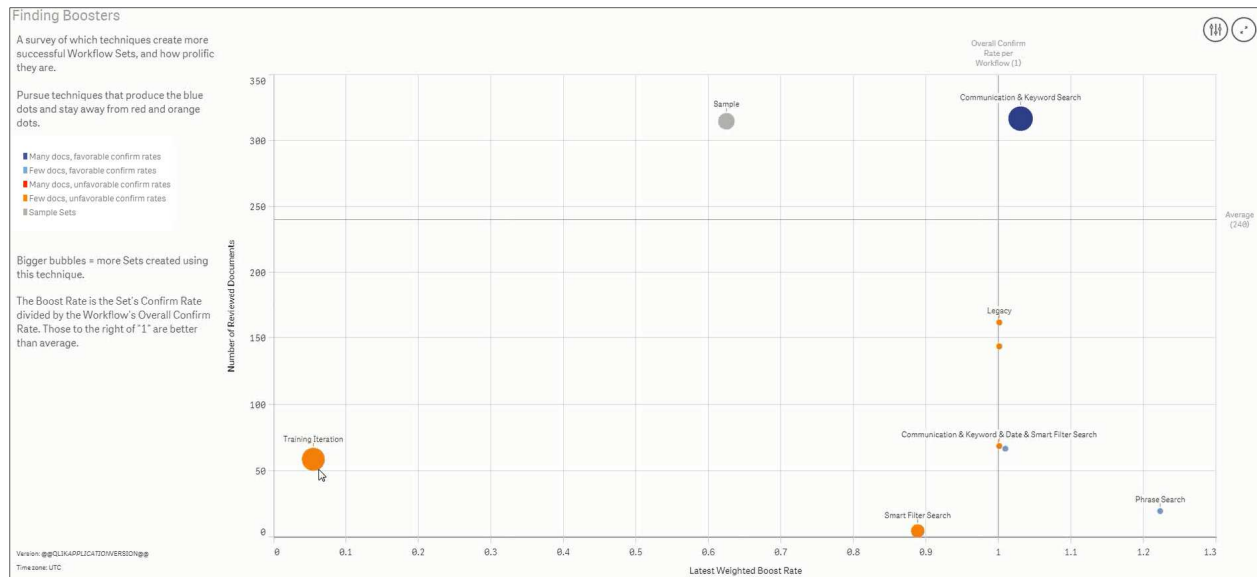

Sheet # 3 - Finding Waste

This sheet uses the Boost Rate to illustrate the general success of Review Workflow sets based on which yielded more or less confirmed documents, and how much human effort was spent reviewing them.
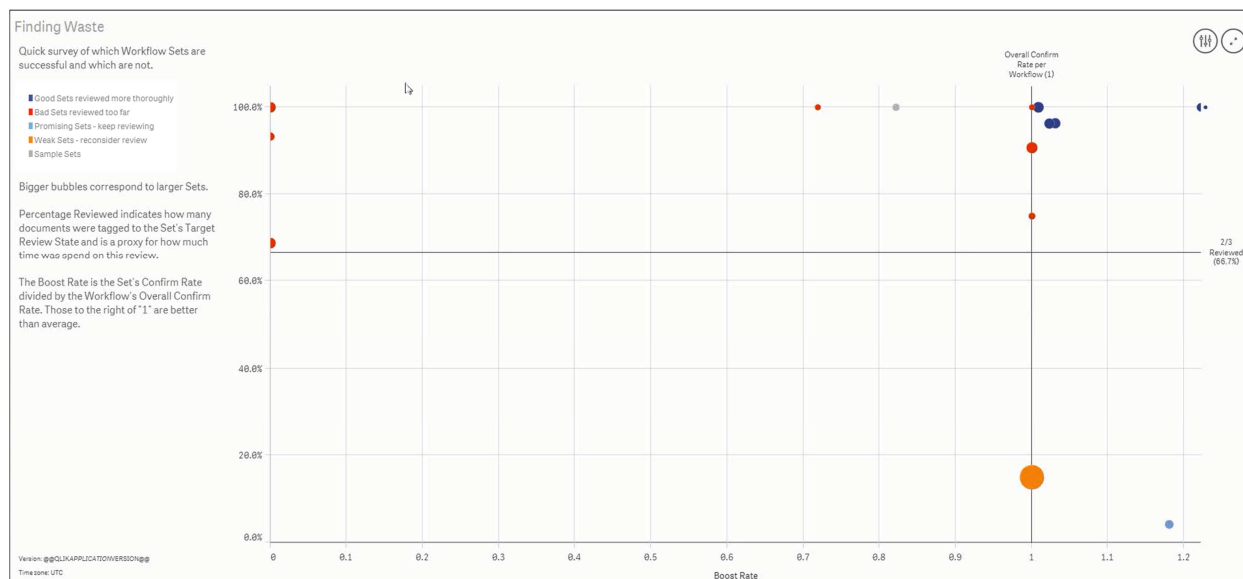
Sheet # 4 - Efficiency Gains

An overview of efficiency gains achieved via Axcelerate features such as family, duplicate and near duplicate detection, and end-of-branch email threading detection.
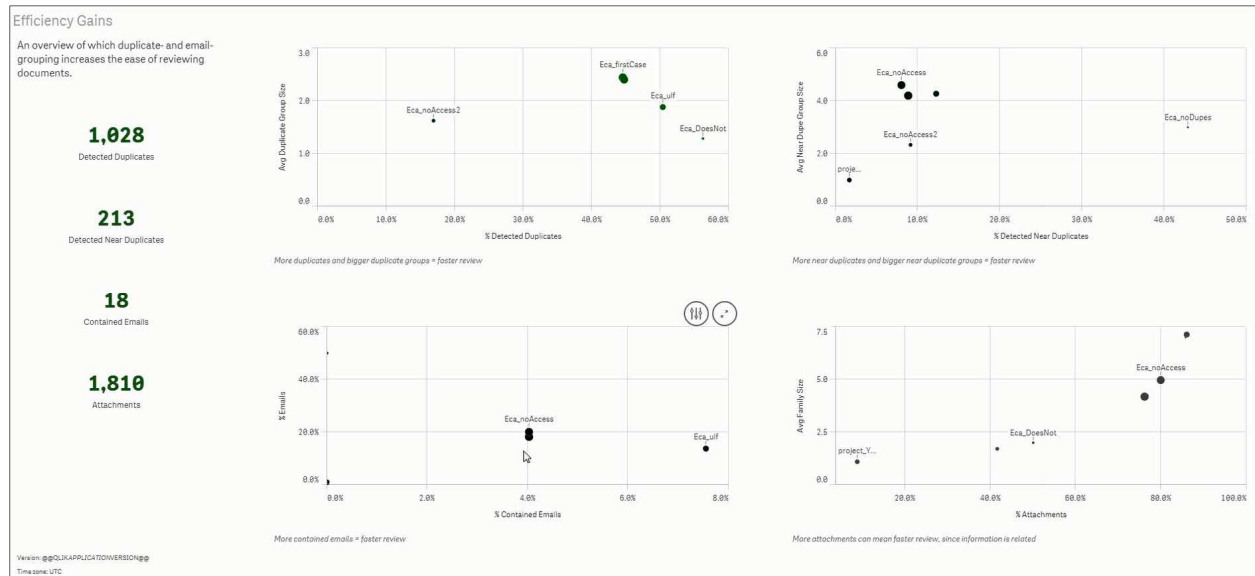
Sheet # 5 - Confirm Rate over Time

A daily look at the number of confirmed documents found by the review team to help identify trends in deploying effective prioritization techniques.
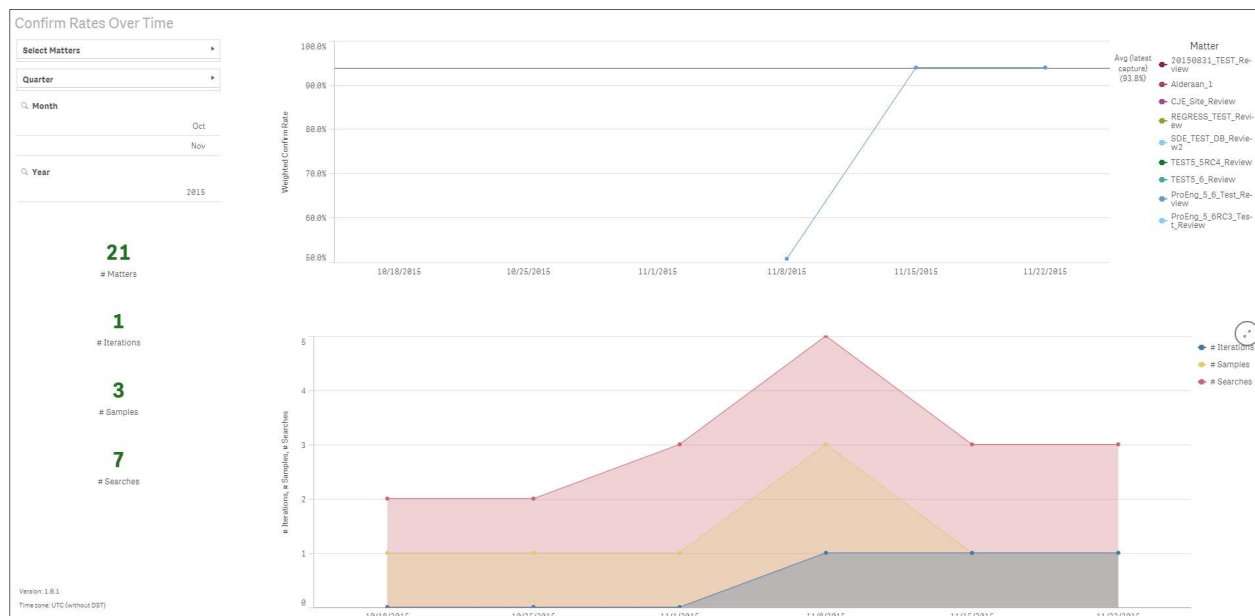
Sheet #6 – Help

This sheet defines various terms and concepts used throughout the Efficiency Score Dashboard.

As with all Business Intelligence Dashboards, the **Efficiency Score Dashboard** features a **Bookmarks** tool that allows users to quickly filter the data to their personal preferences, as well as the ability to generate custom sheets and presentations.

The **Pinning** tool is unique to the **Efficiency Score Dashboard**. Within specific projects, access **Settings page > BI tab** to pin or un-pin a matter for display in the **Efficiency Score Dashboard.** You may want to un-pin less illustrative or inactive projects so they do not skew the results in the dashboard.

On the **Efficiency Score Dashboard** landing page, click the **Pinned** column in the **Document Counts** chart to apply a filter for the pinned projects only. The filter will stick throughout your session unless you actively remove it.
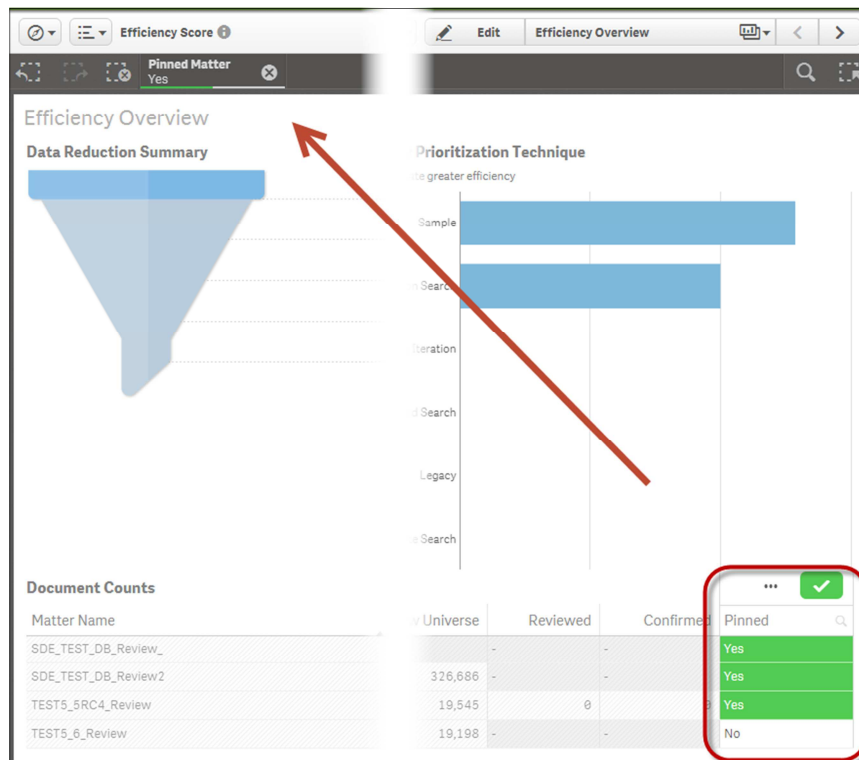
Information in the **Efficiency Score Dashboard** is updated on a weekly basis.

03. EXTENDED BLOOMBERG CHAT PROCESSING

Axcelerate 5.5 introduced powerful display capability for Bloomberg exports received in TXT format. This functionality is now extended in Axcelerate 5.6 to Bloomberg data exported in an **XML format**. In both cases, the meta-data and full text for Bloomberg files are extracted and folded into the current document model in a unique way, such that the rendered information is easy to explore.

04. PERSISTENT DOCUMENT ZOOM

The document zoom level set by the user is now persisted when the user navigates to a different page, document or project. The zoom setting is also sticky session-to-session, assuming the user logs in to Axcelerate from the same computer using the same browser.
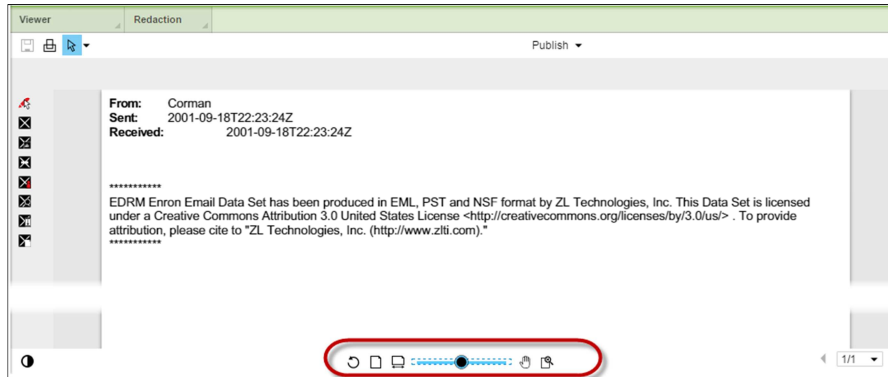
05. CLONE PRODUCTION WORKFLOW SETTINGS

New **Production Workflows** can now be cloned in one simple action, saving a great deal of time setting up a new production set. On the **Mission Control** > **Production Workflows** page, access the **Actions** menu on the row that corresponds to the **Production Workflow** you would like to clone, then click **Clone**.

The **Production Workflows** builder page opens. On the **General** tab, enter a unique name and Bates prefix for the new **Production Workflow**. Click **Apply**.

The information on the remaining tabs (**Settings**, **Rules** and **Layout**), including custom rules, are pre-populated based on the **Production Workflow** that you have cloned. Change any of those settings as appropriate, and save your work. The new **Production Workflow** can be put to use right away.

06. PRODUCTION EXPORT TOOL AND EXPORT PAGE

In Axcelerate 5.6, production sets may be easily exported from the user interface, without accessing the administration tool. All production sets can be exported in one package, or individual volumes can be selected for export. Settings of previously exported productions can be easily cloned to quickly configure a new export.

On the **Mission Control** > **Production Workflows** page, click into the **Production Workflow** of interest. Access the **Actions** menu on the row that corresponds to the **Production Sets** node if you want to export all productions at one time, or expand the node and click **Export** from the **Actions** menu for an individual volume.

The **Export Production** wizard opens, offering a number of specifications to guide the production output. The right-hand panel displays a dynamic summary of the export configuration.

General Settings

In the **General** section, enter a different name for the export, if desired. By default, Axcelerate will name the export for the production node, with a three-digit counter at the end.

To save time, you can clone the settings from a previous export by selecting it in the **Copy Configuration** field. The **File**, **Output** and **Column** settings immediately update to reflect the original export's settings, and you can make updates as needed. If you want to start from scratch, do not make a selection in the **Copy Configuration** field.
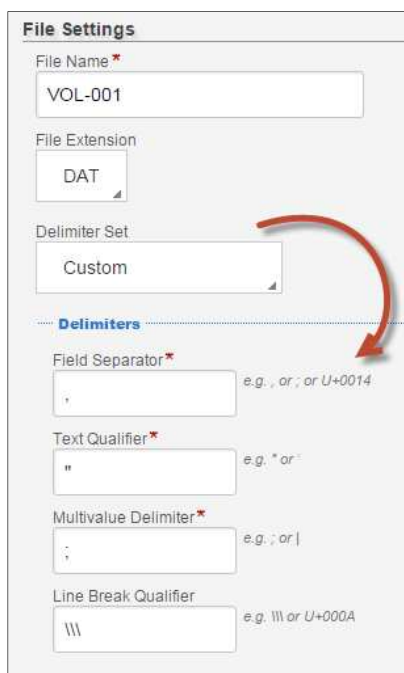
File Settings

In the **File Settings** section, specify how the data file should be named, what type of file it should be (.dat, .txt or .csv) and what delimiter set to apply - Concordance, comma/tab/semi-colon delimited CSV or custom. If **Custom** is selected in the **Delimiter Set** field, additional fields display to allow for granular configuration.

Output Settings

Specify the files to be included in the production package.

Column Settings

Configure the data file fields. Start by specifying the desired date and time format, which can be selected from the provided dropdown menus, or entered as custom text.

In the **Column Selection** area, the default fields are listed as they will appear in the data file. Use the multi-directional arrow icon to drag and drop fields into any desired order. In the **Heading** area, you can change the display name of any of the fields.

Use the field selector to add additional fields to the list. You can enter a field name manually to search for it (type-ahead functionality helps you locate the field), or you can choose from a drop-down menu that lists all of the fields available in the project.

Once you've chosen additional fields, they can be ordered in the main list, and the display name can be modified, as with the default fields.

To remove fields from the list, hover over the field so that it is highlighted, then click the X icon that appears at the end of the row.

As a safety check, BEGBATES, ENDBATES, BEGATTACH AND ENDATTACH cannot be removed from the list of exportable fields unless you proactively check the **Enable removal of Bates values** box at the bottom of the list.

Once all configurations are made, double-check the summary panel to make sure everything looks correct. If it does, you are ready to **save** the settings for later or **run** the export now.

A "snapshot" of the documents and Production Workflow settings is captured when an export is created. It contains the documents that will be exported along with all the metadata, tagging information and text, image, native files. **If you choose to save the export settings and run it later, you can re-configure the settings, however the data in the snapshot will not change.** If you wait a long time between saving an export and actually running it, the snapshot of the **Production Workflow** becomes "stale," as the metadata or production image for documents may have been updated in the meantime. Also, production rules and other settings associated with the **Production Workflow** may have changed, or the documents belonging to the volume. As such, the snapshot may no longer reflect the current state of the **Production Workflow**.

Once an export has been run, the snapshot is deleted, and the export settings are locked. This preserves a record of what was exported at any given time.

Run a saved production and/or download the production package from the new **Exports** page, found under the main **Administration** page.
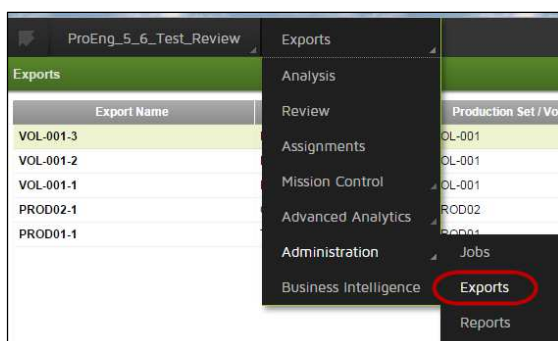
Exports are listed in a grid, with various columns of information available for sorting the list. Details for the currently selected row in the grid are seen in the right-hand panel.

The **Status** column indicates whether an export has run successfully, failed or is awaiting action.

The options available in the **Actions** menu for each job are dependent on the status of the job.

	Status	Actions Available
✅	**Finished**: The export has run successfully and is ready for download.	Download Export Delete
❌	**Failed**: An error occurred in preparing the export. Delete and re-try, or contact your project administrator for help.	Delete
▶️	**Running**: Export is running. The status will be updated once complete, and the Download action will become available at that time.	Delete
⚙️	**In preparation**: Settings for the export were saved, but the job has not yet been run. Changes to the configuration can still be made, or you may run the job or delete it.	Run Configure Delete
⚠️	**Stale**: Settings for the export were saved more than 7 days ago, but the job has not yet been run. Exercise caution running the job, as the Production Workflow configuration and scope of the documents in the target export set may have changed in the interim.	Run Configure Delete

Once an export has completed, use the **Actions** menu > **Download** option to access the production package.

Exports are structured into the following folders, to the extent they are part of the export package:

- DATA (OPT & DAT load files)
- IMAGES
- TEXT
- NATIVES

The export tool is available only for productions that were set up as **Production Workflows**.

07. QUICK TEXT VIEW

Axcelerate 5.6 uses a new technology to provide a simple **Text** view that renders faster than in previous versions. The new **Text** view provides basic formatting and highlighting, and, in most cases, serves to fully examine the document with no need to access the **Near Native** or **Redaction** views.
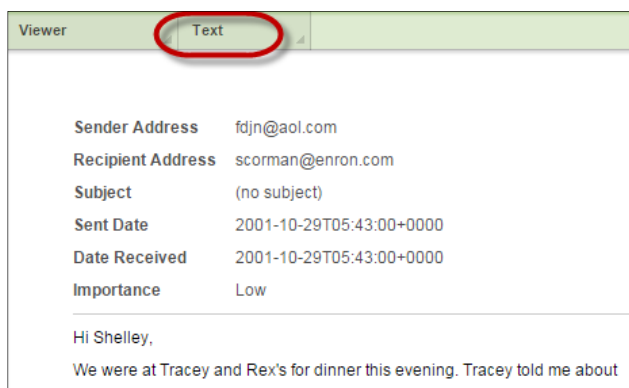
While the quick **Text** view is the default view, users can now easily set a preference to suit the type of work in progress. In the view selection menu, hover beside the preferred view until a pin icon appears. Click the icon to set the preference.
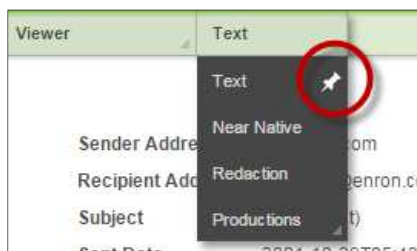

If the preferred "pinned" view takes longer than a few seconds to render, Axcelerate will display the quick Text view in the meantime, then display a message when the preferred view is ready.
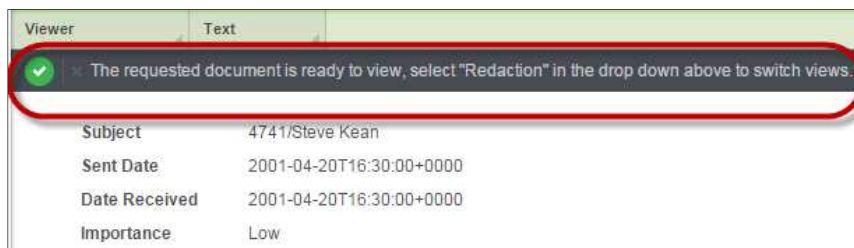
Because the new **Text** view uses a different technology than the **Near Native** and other views, highlighting may vary slightly between the **Text** view and other views. In addition, single-document printing and within document search using regular expressions are not supported on the new **Text** view.

08. SAVE + NEXT UNREVIEWED OPTION

A new batch navigation option is available to users working within a review batch on the **Review** page. The new **Save + Next Unreviewed** button is sensitive to the target *Review State* of the batch in progress, and allows the reviewer to quickly jump to the next unreviewed document in the review batch. Toggle from the existing **Save & Next** button to take advantage of the new feature.
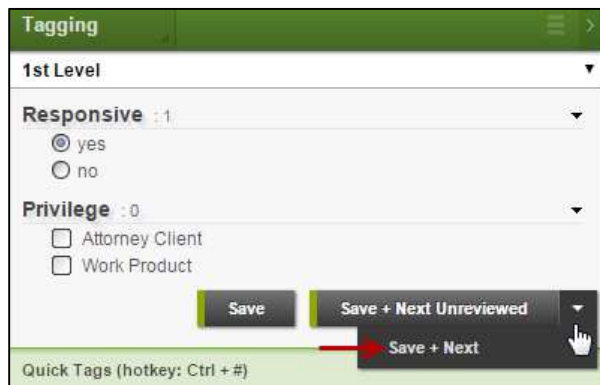
The **Save + Next Unreviewed** button is designed for batch review only – it is not available on the **Analysis** page, nor is it available on the **Review** page when not working in a review batch.

09. TAGGED BY ICON INSTANT REFRESH

In Axcelerate 5.6, the **Tagged By** icon refreshes instantly once coding is applied to a document. Previously a refresh of the current page was required.
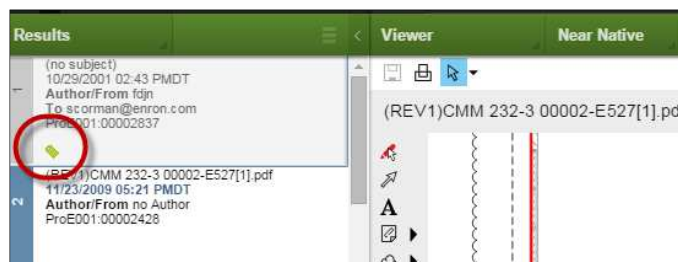
**10**. REVIEW WORKFLOW AND CUSTOM UNIVERSE REMOVAL

Case Managers can now easily delete **Review Workflows** and custom **Universes** from the project via the **Mission Control** page.

To delete a **Review Workflow**, select the **Delete** option in the **Action** menu for the corresponding grid row.


Deleting a **Review Workflow** does not delete the underlying field value, but it does remove it from the current **Universe** and permanently erase any associated saved searches/sets, iterations and batches that are not in active review. A dialog box asks you to confirm your understanding of the action, because it cannot be undone.

If an associated batch is in active review, Axcelerate will not allow you to proceed with **Review Workflow** deletion. Use the **Assignments** page to determine which batch is in review, and try the deletion again once the batch is closed.
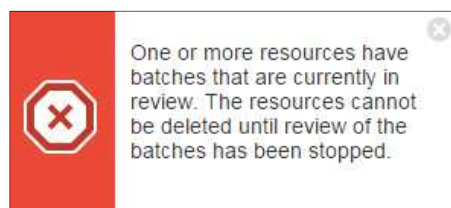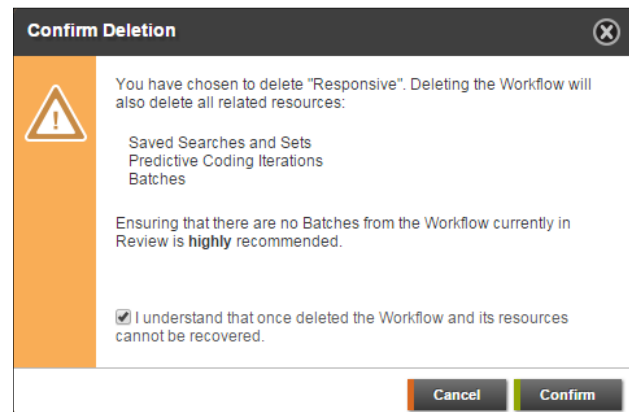

After a **Review Workflow** has been deleted from a **Universe**, the underlying field value becomes available once more in the **Add Workflow** dialog box for that **Universe**, though previously existing searches/sets, iterations and batches are never restored.
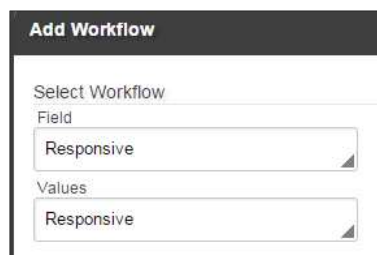
Custom **Universes** can now be deleted in much the same way as **Review Workflows**. On the **Mission Control** page, switch to the custom **Universe** you'd like to erase. Select **Delete** from the **Actions** menu corresponding to the **Scopes & Samples** node.
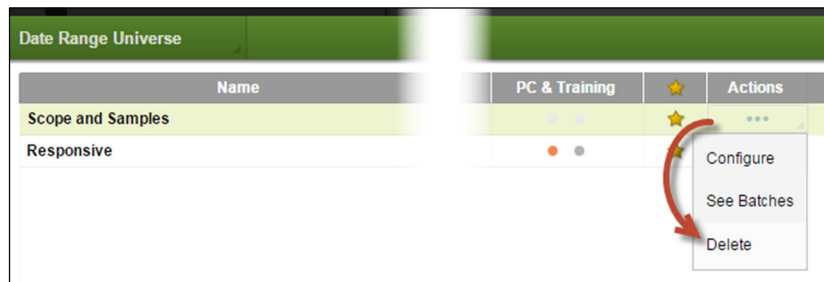
Deleting a custom **Universe** permanently erases any associated **Review Workflows**, samples, saved searches/sets, iterations and batches that are not in active review. A dialog box asks you to confirm your understanding of the action, because it cannot be undone.
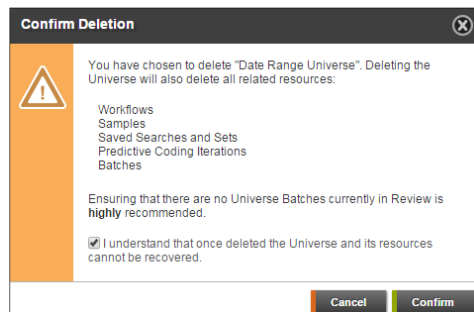
As with **Review Workflows**, custom **Universes** cannot be erased if there are active batches in review.

Deleting **Review Workflows** and custom **Universes** effectively cancels any scheduled searches, iterations and batching previously associated with the deleted item. It also removes associated values from the **Review Workflows Smart Filter**.