AXCELERATE 5

01. BUSINESS INTELLIGENCE DATA RELOAD

You can now pull data into the Business Intelligence dashboards at any time, without waiting four hours for the system auto-refresh. This allows you to view up-to-date productivity numbers (e.g., working minutes and tagged document counts) and application information (e.g., new applications and run status).

To reload data on a Business Intelligence page, click the toolbar button located in the panel header and then click Reload Dashboard Data.
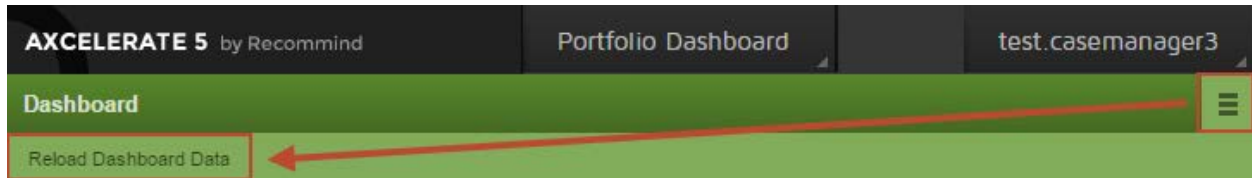

Not every aspect of a dashboard will update with a data reload as new computations are not triggered. The calculations on the Efficiency Score dashboard, for example, are not recomputed; these calculations remain auto-updated every Sunday. For this reason, benefits of the new Reload Dashboard Data feature are best realized on the Productivity and Portfolio dashboards.

02. CURRENT CRITERIA PANEL ENHANCEMENTS

The Current Criteria panel, when set to its default height, is now fully functional. Hover on any applied criteria label and the full criteria for that item is displayed in a tooltip.
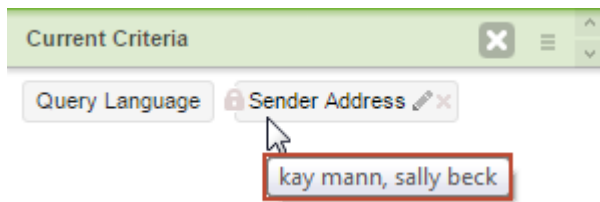
You also no longer need to expand the panel to lock criteria, remove criteria or edit criteria; just hover your mouse on any criteria label and the options become visible.
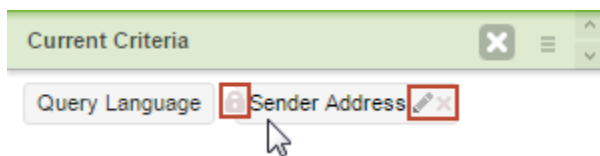
The maximized height of the Current Criteria panel has been increased to 50%. This allows you to easily see applied criteria details for complex queries without scrolling. After it is maximized, the panel remains expanded for the current session.

03. RESPONSIVE FIELD RENAMED

New projects created in Axcelerate 5.9 will see the default "Responsive" field has been renamed Responsiveness and the default values have been renamed from "Yes" and "No" to "Responsive" and "Not responsive." This change is expected to reduce confusion when Responsiveness field values are used as review workflows, i.e., the workflow names will be "Responsive" and "Not responsive" instead of "Yes" and "No."

RECOMMIND is now OPENTEXT

04. U QUICK TAG

A new U quick tag option—U for Apply Updated Tagging—is now available for all matters (new and upgraded) when the "Include 'Last' Quick Tag Default" setting is turned on for a tagging arrangement. This quick tag duplicates tags updated by you to a current document, into the next document you review. If the next document contains existing tags, those tags remain unchanged.

Quick Tags (hotkey: Ctrl + #)

1 2 3 4 5 6 7 8 L U

Shortkey: Ctrl + U

This quick tag is best used to apply consistent tagging *updates* to documents (e.g., to add an issue tag or privilege flag).

U Quick Tag Example

The document you are currently reviewing is tagged Responsive and issue tagged Taxes. You add an Audit issue tag, input "Potential impeachment document" in the Review Comment text field and save.

Document One Original Tagging

Document One Tagging After Save

You navigate to the next document. This document is already tagged Responsive, issue tagged Invoices and contains the words "Depo prep" in the Review Comment field. You apply the U quick tag.

The document is now tagged Responsive, Invoices, Audit, and "Potential impeachment document" in the Review Comment field. The Taxes tag is not duplicated forward because you did not add it to Document One; it was a preexisting tag.

Document Two Original Tagging

Document Two Tagging After U Quick Tag Save

RECOMMIND is now OPENTEXT

05. L QUICK TAG REFRESHER

The L quick tag functionality—L for Apply Last Tagging—has not changed; it can still be used to duplicate all tags applied to the last document, whether preexisting or new, to the next document. Tags that preexist on that next document are overwritten.

This quick tag is best used to apply consistent *identical* tagging across documents.

L Quick Tag Example

The document you are currently reviewing is tagged Responsive and issue tagged Taxes. You add an Audit issue tag, input "Potential impeachment document" in the Review Comment text field and save (same result as Document One for the U Quick Tag example).

Document One Original Tagging

Document One Tagging After Save

You navigate to the next document. This document is already tagged Responsive, Invoices and "Depo prep" in the Review Comment field. You apply the L quick tag.

The document is now tagged Responsive, Taxes, Audit (all tags duplicated from document one) and "Potential impeachment document" in the Review Comment field (text added by you to the last document overwrote preexisting text). Invoices, a preexisting tag on document two, is overwritten with a null value because Document One did not contain that tag.

Document Two Original Tagging

Document Two Tagging After L Quick Tag Save