



RECOMMIND®

AXCELERATE® 5

AXCELERATE 5 REVIEWER USER GUIDE

CONTENTS

1	GENERAL NAVIGATION	4
1.1	Accessing Your Projects.....	5
1.2	Last Accessed Page, Results	6
1.3	2-Screen Mode.....	6
2	ASSIGNMENTS PAGE.....	7
2.1	Pull Batches Feature.....	8
3	RESULTS LIST.....	9
3.1	View Metadata.....	9
3.2	Batch Display – Group/Sort	10
3.3	Document Visibility – Hide Reviewed Documents.....	11
3.4	Document Visibility - Show Associated Results Outside of Batch.....	11
3.5	Associated Results in the Batch	12
3.6	Email Threads.....	14
3.7	Navigate Associated Results View	15
3.8	Tagged Doc Icon	15
4	TAGGING	16
4.1	Bulk Tag Associated Documents	17
4.2	Tagging Rules.....	18
5	VIEWER	20
5.1	Pinning a View	20
5.2	View-specific Notes.....	21

5.3	Download Natives	21
5.4	Search within a Document	21
5.5	Mark for Redaction	22
6	TEXT AND METADATA HIGHLIGHTING	23
7	ANNOTATION AND REDACTION TOOLS	25
7.1	Annotations	26
7.2	Redactions	27
7.3	Redaction Audit Tool	30
7.4	Background Color Toggle	33
8	FOLDERING DOCUMENTS	33
9	PRINTING	35
10	SEARCHING	35
11	USER PREFERENCES	36
12	SESSION TIMEOUT	36

INTRODUCTION

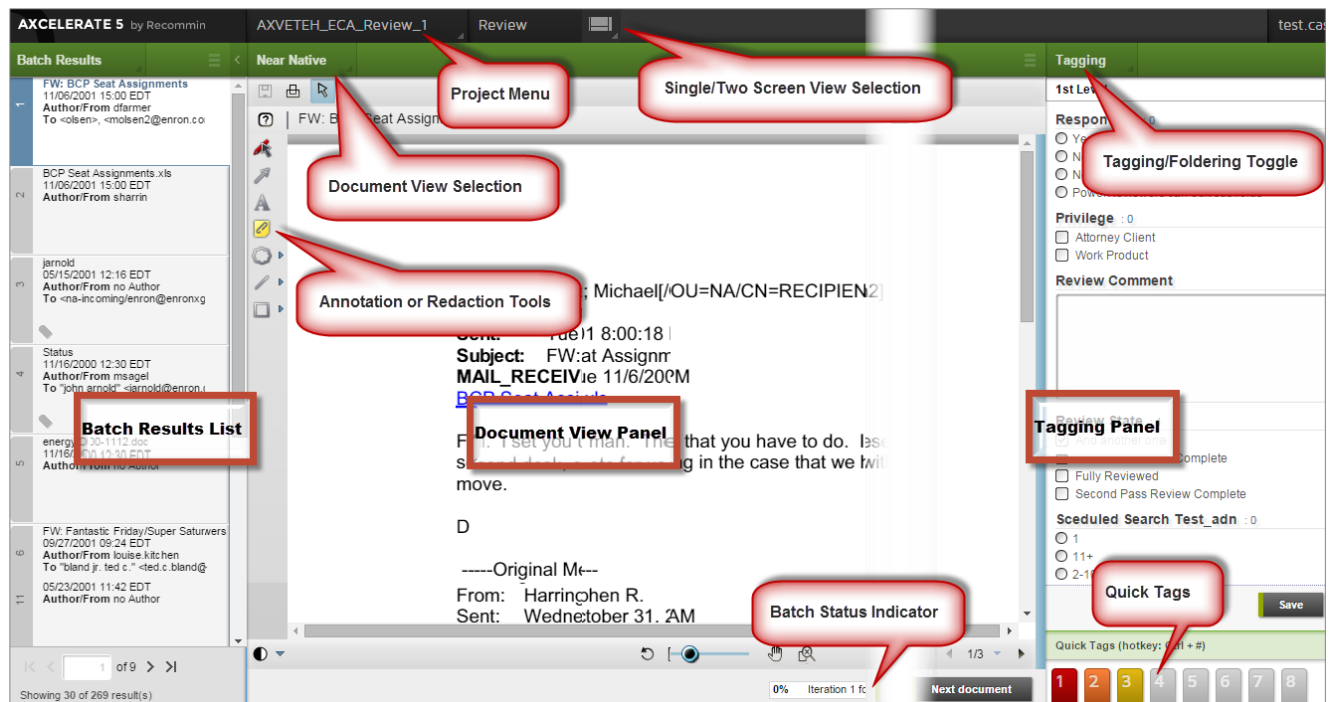
Accelerate 5 is a web-based document review and analysis application that requires no plug-ins. Use of Chrome, Internet Explorer 10 or 11, or Firefox is required.

This document provides the Reviewer User a quick reference for the major features and functionality of Accelerate 5.

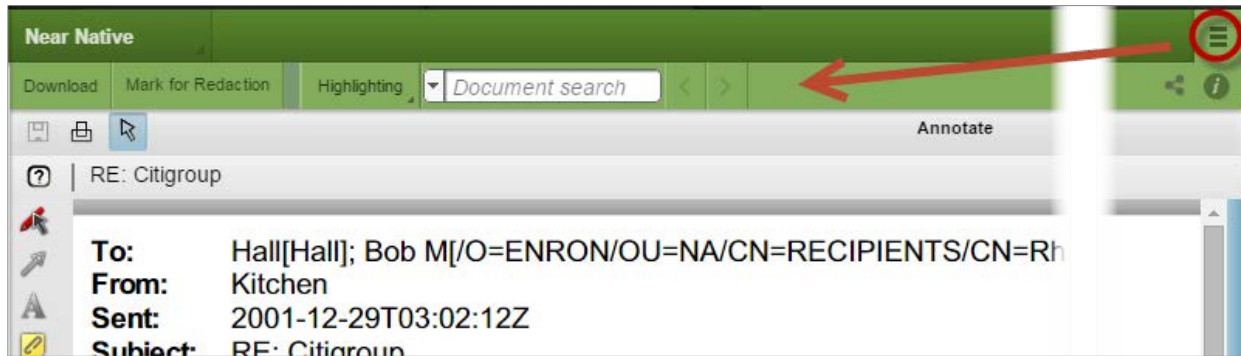
1 GENERAL NAVIGATION

Accelerate 5 features are displayed in three main panels, and the panels expand and collapse to offer flexible viewing real estate:

- **Batch Results List Panel**
- **Document View Panel**
- **Tagging Panel**

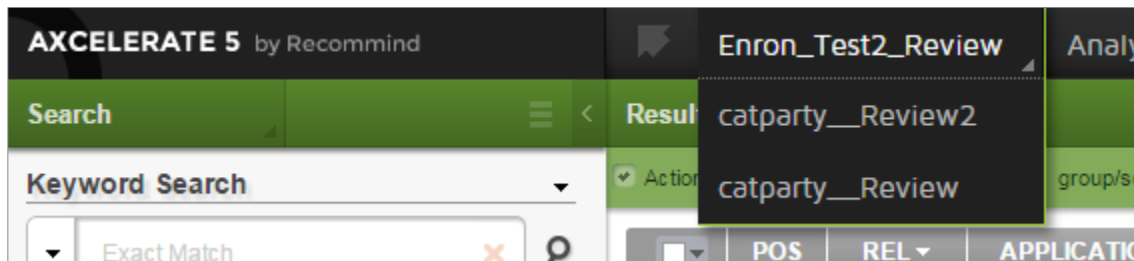


Many tools are accessed via **stacked menus**, which are collapsed by default to provide maximum viewing space.

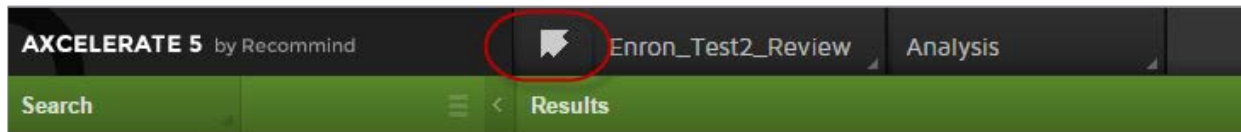


1.1 Accessing Your Projects

If you have rights to more than one project, use the **Project Menu** at the top of the page to quickly navigate between projects. Your last accessed projects are displayed.



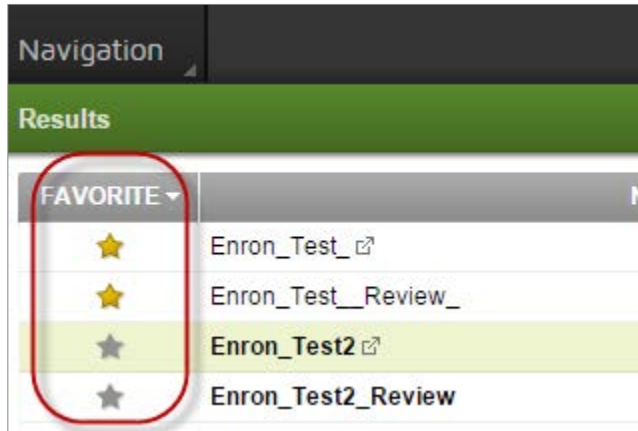
If you need to work in a less frequently-used project, click on the **Matter Navigator** icon to see a list of all of your Accelerate ECA and Review projects.



The **Matter Navigation List** features sortable columns so you can quickly organize your projects. If you have access to any ECA matters, Accelerate will recognize your trusted log-in so you can click on it in the **Matter Navigation List** and launch directly – no need to log in again.

Navigation				
Results				
FAVORITE	NAME	TYPE	STATUS	CREATION DATE
★	Enron_Test2	ECA	✓	11/02/2015
★	Enron_Test2_Review	R&A	✓	11/02/2015
★	Enron_Test_	ECA	○	10/02/2015
★	Enron_Test_Review_	R&A	○	10/02/2015
★	Fun_Zone	R&A	○	29/01/2015

If your list of projects is long, make the ones most frequently-accessed **Favorites** by clicking on the star icon in the **Favorites** column. Then sort on the **Favorites** column so those projects are always on top of the list.



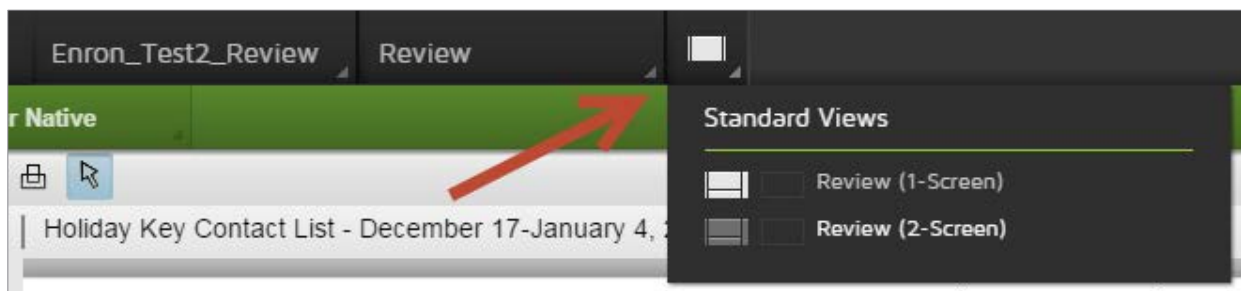
1.2 Last Accessed Page, Results

The first time you log into Accelerate you will land on the **Matter List**. Thereafter, you will always land on the last accessed page (e.g., **Analysis** page, **Review** page, **Workflows** page), in your last accessed project, upon log-in.

Accelerate also remembers your applied search criteria, if any, as you navigate within a project.

1.3 2-Screen Mode

2-Screen Mode is available on the **Review** page – make sure to allow pop-up blockers from Accelerate in order to take advantage of **Two-Screen Mode**.



When you activate **2-Screen Mode**, the document list displays in a separate window, as shown below. From this window, you can access various **Results List** tools such as the **Group by Family** option, and the column sorter – such tools are found under the stacked menu.

Batch Results

comfortable ☐ dense group/sort columns

POS	REL	ID	DOCUMENT DATE	MIME TYPE
1	100%	AXVE01:00030100	11/06/2001 15:00 EDT	PDF
2	100%	AXVE01:00001676	05/23/2001 11:42 EDT	PDF
3	100%	AXVE01:00001654	05/23/2001 11:42 EDT	PDF
4	100%	AXVE01:00001647	05/23/2001 11:42 EDT	PDF
5	100%	AXVE01:00001664	05/23/2001 11:42 EDT	PDF
6	100%	AXVE01:00007869	12/08/2000 10:48 EDT	PDF
7	100%	AXVE01:00007937	11/29/2000 05:02 EDT	PDF
8	100%	AXVE01:00007925	11/29/2000 05:02 EDT	PDF
9	100%	AXVE01:00009246	12/13/2000 08:26 EDT	PDF
10	100%	AXVE01:00010835	10/22/2001 22:35 EDT	PDF
11	100%	AXVE01:00011061	10/23/2001 21:10 EDT	PDF
12	100%	AXVE01:00011473	10/24/2001 21:26 EDT	PDF
13	100%	AXVE01:00013109	11/20/2001 14:10 EDT	PDF
14	100%	AXVE01:00026029	12/22/2000 02:26 EDT	PDF

Advanced search filters are also accessed via **2-Screen Mode**.

AXCELERATE 5 by Recommend

Search **Results**

comfortable ☐ dense group/sort columns

Keyword Search

Exact Match

Search In

Analytics

Date

Email

Email Properties

File Properties

Storage Properties

Document Properties

Exception Status

Production / Conversion

Work Product

Review Fields

POS	REL	DOC #	DOC
1	100%		
2	100%		
3	100%		
4	100%		
5	100%		
6	100%		
7	100%		
8	100%		
9	100%		
10	100%		
11	100%		
12	100%		
13	100%		

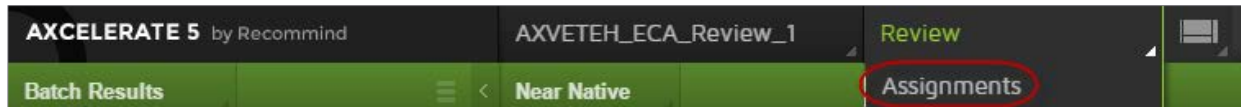
To exit **2-Screen Mode**, simply close the pop-up window.

When **2-Screen Mode** is not engaged, the document list displays on the same screen as the document viewer in a card format, discussed below.

If you are in dual screen mode when you log out, Accelerate will remember your preference and you will be returned to that mode when you log back in.

2 ASSIGNMENTS PAGE

You can access the **Assignments** page via the **Pages** menu.



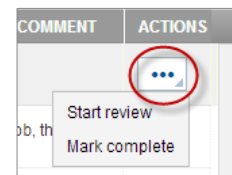
The **Assignments** page displays information about any batches assigned to you.

- Batch Name
- Total number docs
- Reviewed status bar
- Target Review State
- Status (Assigned, Review paused, Complete)
- Assignee/Creator
- Creation Date
- Comment (Creator can add a comment to the reviewer when they assign a batch and Assignee can add a comment when they mark the batch complete)

Assignments										
	BATCH	DOCUMENTS	REVIEWED	TARGET	STATUS	ASSIGNEE	CREATOR	CREATION DATE	COMMENT	ACTIONS
<input type="checkbox"/>	Iteration 1 for Money Laundering ...	103	<div></div>	First Pass Review Complete	Review paused	test.casemanager2	test.casemanager1	10/23/2014 23:50		...
<input type="checkbox"/>	Iteration 2 for Money Laundering ...	103	<div></div>	First Pass Review Complete	Unassigned	Unassigned	test.casemanager1	11/01/2014 17:00		...

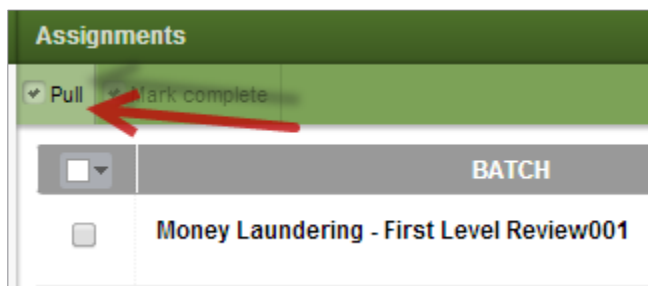
Click on the **Actions** menu for a batch.

- **Start Review** to open the batch on the **Review** page and begin work.
- **Mark Complete** to indicate to the Case Manager the batch is completely reviewed. Batches marked complete disappear from the **Assignments** page and are no longer accessible to you.



2.1 Pull Batches Feature

If your project is set up to allow you to pull batches when you have completed your current assignment, expand the stacked menu at the top of the **Assignments** page and click on **Pull Batches**.



This tool is set up based on the **Review State** associated with review batches, and you can assign yourself batches without the Case Manager's intervention. In the **Pull Batches** window, specify the number of batches you'd like to pull and select the **Target Review State**, e.g., First Pass Review, from which you'd like to pull associated batches. Use **Actions > Start Review** to open the batch and conduct review on the **Review** page.

Pull Batches

Please specify the amount of batches you would like to pull.

Amount

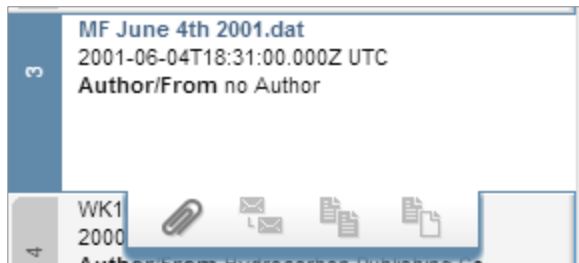
Please choose the Target Review State of the batches you would like to pull.

Target Review State

- Any Review State
- Any Review State
- First Pass Review Complete**
- Fully Reviewed
- Second Pass Review Complete

3 RESULTS LIST

On the **Review** page, notice the **Batch Results List** on the left, which displays in a card format. Each “card” displays limited metadata for the documents in the batch.

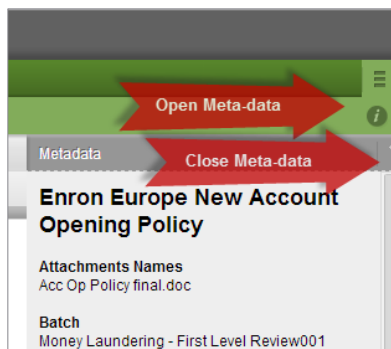


Navigate from document to document in the **Results List** without applying coding by using the buttons beneath the **Viewer**.



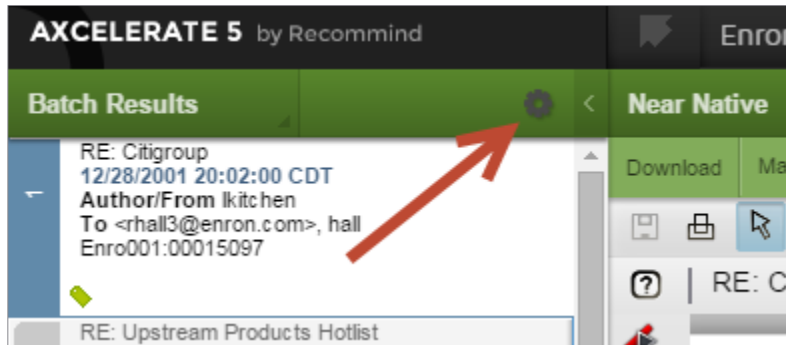
3.1 View Metadata

To view all of a document's meta-data, open the stacked menu above the **Viewer Panel** and click on the **Information** icon that opens the expanded **Meta-data Fly-in** pane. Close it by clicking the small arrow in the top-right of the pane.

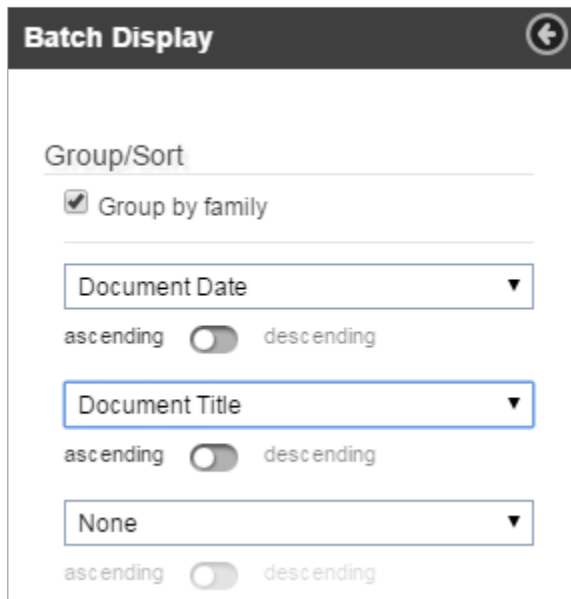


3.2 Batch Display – Group/Sort

The **Batch Results Panel** offers several tools to allow you to customize what appears in your batch, and the order in which documents appear. Click the **cog icon** to see and adjust the settings.

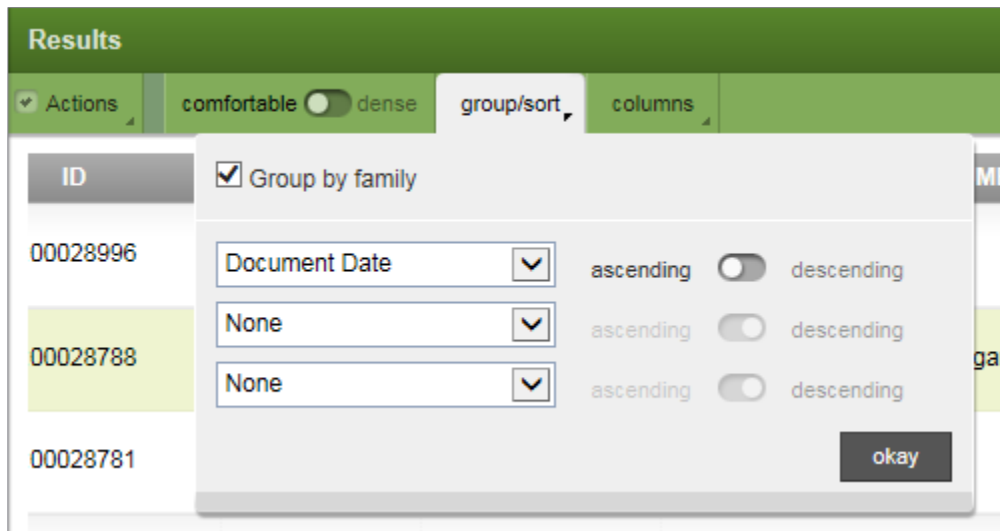


The first section of the **Batch Display** fly-in offers group/sort choices.



By default, the **Group by family** option is enabled, so documents order in family groups automatically. When this setting is on, the parent document always displays first in the list, followed by its attachments.

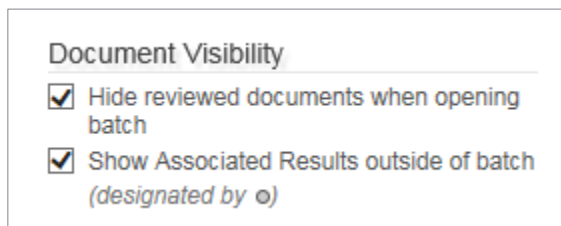
You may sort your batch by any field that is visible in the card view, with up to three levels of sort available. If you are in **2-screen mode**, you can use the **Group/Sort** menu found under the **Results List** to sort by any fields that are enabled in the project.



All **Batch Display** options are sticky session-to-session, i.e., once you have enabled a preference, all of your batches will display accordingly, until you actively make a change.

3.3 Document Visibility – Hide Reviewed Documents

Directly under the Group/Sort icons in the **Batch Display Settings** fly-in are two important options that can be adjusted to control what appears in your batch.

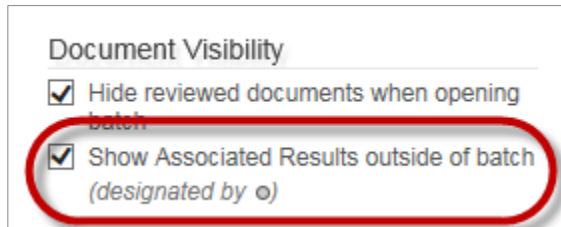


The **Hide reviewed documents when opening batch** option will apply a filter in the background that hides any documents previously reviewed by any user for the target Review State of the batch you are currently working on. You might want to turn this option on so that, once you code a document, it “disappears” from your view, keeping your Results List narrowed to the documents remaining for review. However, if you like to code documents, then return to them for further consideration, you would want to leave this option off.

You can turn this feature on/off any many times as needed while you are working on a batch. It is sticky session-to-session.

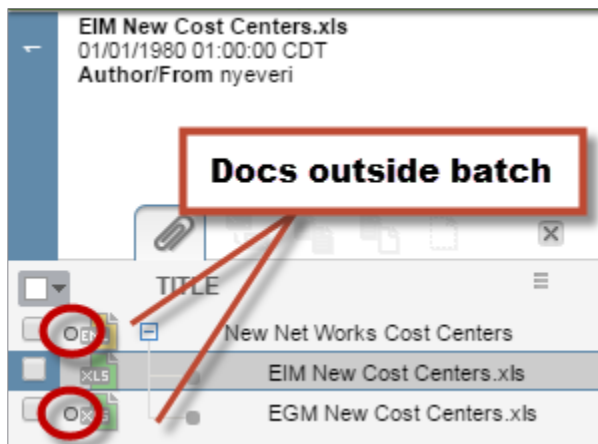
3.4 Document Visibility - Show Associated Results Outside of Batch

This option, also in the *Document Visibility* section of the **Batch Display Settings** fly-in, is seen by Power Reviewers, Power Users and Case Managers only.



When the option is enabled, any associated family, threads, duplicates, near duplicates or custom associated documents that are related to any document in your batch will be available to you for review and coding.

In many cases, you may only want to be aware of such documents so you can evaluate them for context while you make coding decisions on the documents that are actually in your batch. Associated documents outside the batch are marked with an icon so you can easily tell them apart.

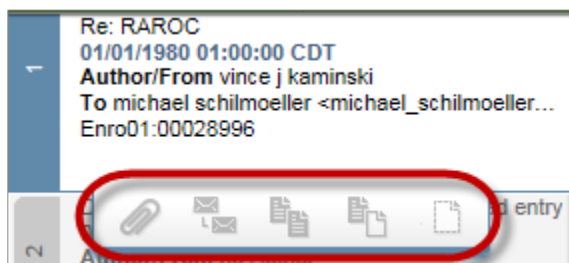


If you do intend to code documents that are outside of your batch, you can use the bulk coding technique described in Section 4.1. Unless your Case Manager has explicitly directed you to code documents outside your batch, it's a good idea to confirm the workflow before proceeding. **Coding documents outside of your batch could potentially overwrite coding another user has made to the document.**

This option is sticky session-to-session.

3.5 Associated Results in the Batch

Click on a card in the **Results List** and hover over it to display the **Associated Results** icons.



Bolded icons indicate an associated document exists, though it may, or may not be, contained in the batch, depending on how the batch was created. The possible associations are:



Family: the document has parent or child relationships; a small arrow pointing down within the icon indicates the document is a parent, a small arrow pointing up indicates it is a child



Email Thread: the document is part of an email thread



Duplicates: the document has duplicates, identified using the MD5 hash value

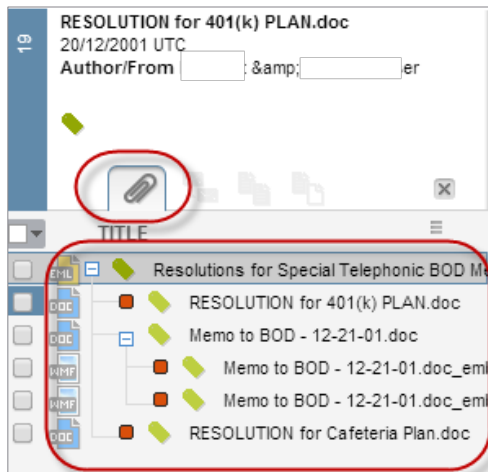


Near Duplicates: there are documents 85% or greater in similarity to the current document

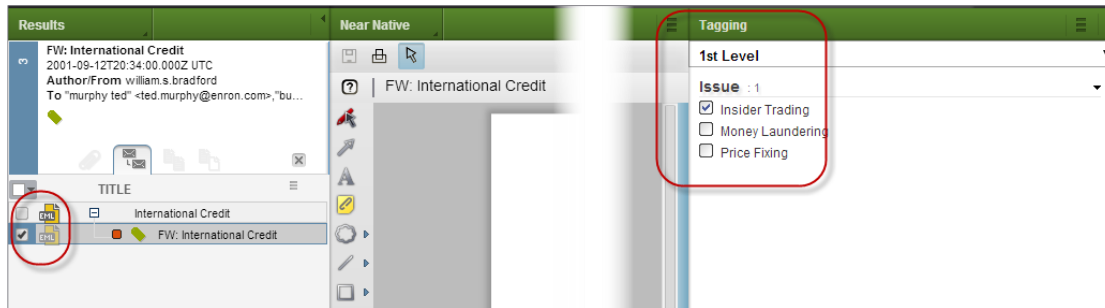


Custom Associations: This icon will never be active unless your Case Manager has requested custom "linking" of documents. This workflow is sometimes used to associate a translated version of a document to the original foreign language document.

Click on an **Associated Documents** icon to display the associations in tree view.

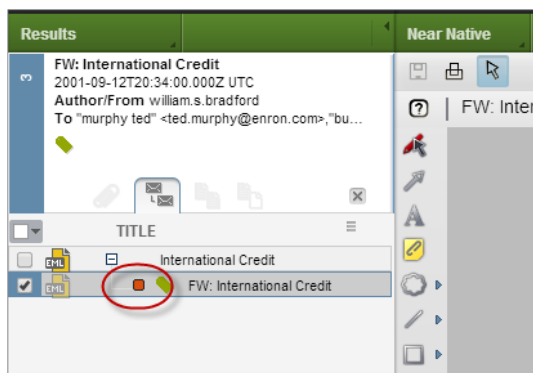


Click a document in the tree view to display that document in the **Viewer**. To code the document, with or without the associations, select the checkbox to the left of a document in the list to activate the **Tagging Panel**. Tag the document accordingly.

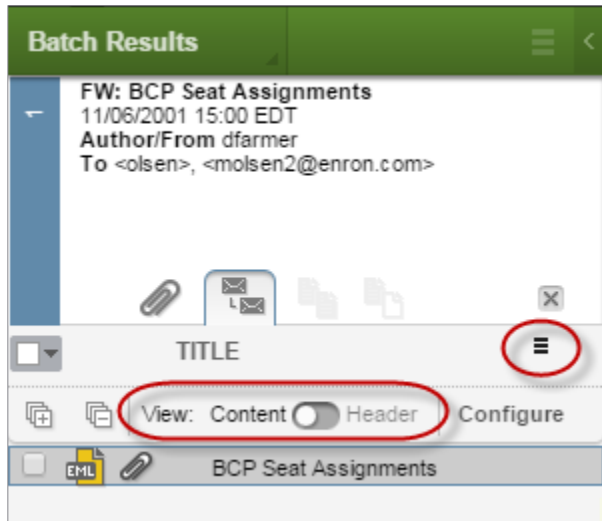


3.6 Email Threads

Use of the **Associated Results** view noted in the preceding section is especially useful for coding email threads (to the extent the batch was created to include threads). When viewing Email Thread associations, the red box indicates a document is the **end-of-branch email**, meaning it is inclusive of all the other emails shown in the tree. Once a coding decision is made for the end-of-branch record, it is possible to select it and the other threads and code them together to ensure consistency.

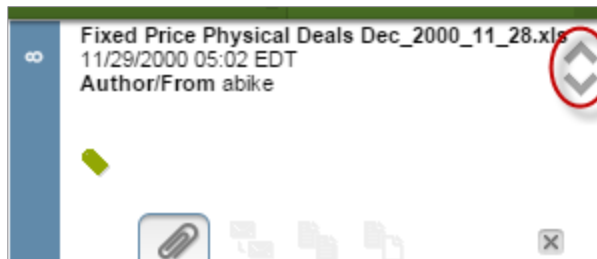


Accelerate features the ability to display email threads calculated on content or header analysis, to the extent the Case Manager has requested this special configuration. To switch between content-based and header-based threads, expand the stacked menu within the **Associated Results View** for threads, then use the view toggle.

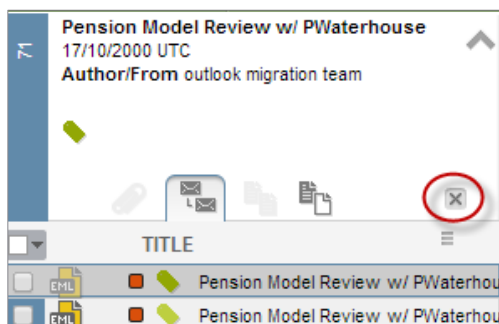


3.7 Navigate Associated Results View

Use the up and down arrows to navigate between documents while remaining in **Associated Results** mode.




Close the **Associated Results View** by clicking the X icon.



3.8 Tagged Doc Icon

The **Tagged** icon indicates a document has been coded in a review-enabled Arrangement by a user

(any user, any field).  If the icon is green, a tag was applied by the current user. If it is gray, the document was tagged by another user.

4 TAGGING

The **Tagging Panel** is used to apply coding to a document as you are moving through the **Results List**, viewing content and making coding decisions. Click the **Save** button to save the coding and remain on the current document or click **Save & Next** to save the coding and move to the next document in the **Results List**.



Alternatively, toggle from the **Save & Next** button to the **Save + Next Unreviewed** button to jump directly to the next unreviewed (i.e., not tagged for the target *Review State* of the batch) document in the review batch. Typically, Reviewers like to use **Save + Next Unreviewed** to navigate a batch on the first tagging pass, then switch to the **Save & Next** button for their QC pass.

A screenshot of the 'Tagging' panel. It has a green header with the title 'Tagging' and a menu icon. Below the header, there are two sections: '1st Level' and 'Responsive : 1'. The '1st Level' section has a dropdown menu. The 'Responsive : 1' section has radio buttons for 'yes' (selected) and 'no'. Below that, there is a 'Privilege : 0' section with checkboxes for 'Attorney Client' and 'Work Product'. At the bottom, there are three buttons: 'Save', 'Save + Next Unreviewed', and 'Save + Next'. A red arrow points from the 'Save + Next Unreviewed' button to the 'Save + Next' button. A hand cursor is over the 'Save + Next' button. At the very bottom, there is a green bar with the text 'Quick Tags (hotkey: Ctrl + #)'.

Multi-select fields, like **Issue**, have values that are selected by a checkbox. Single-select fields have radio buttons.

A screenshot showing two fields. The first field is 'Issue : 3' with a list of checkboxes: 'Kickbacks' (checked), 'Money Laundering' (checked), 'Monopoly' (checked), and 'Price Fixing' (unchecked). A red arrow points from the text 'Multi-value' to this field. The second field is 'Demo_Responsive : 1' with radio buttons for 'No' and 'Yes' (selected). A red arrow points from the text 'Single value' to this field.

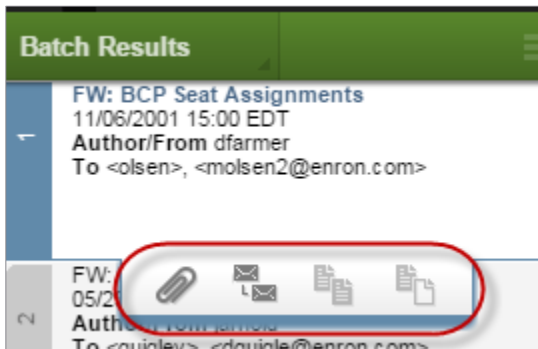
Quick Tags are found below the **Tagging Panel**. There are up to eight tags that a Case Manager can set with common tagging combinations to speed review - the tags are available for all users working in the project. If a **Quick Tag** number is highlighted, it is active for use. Once coding has been applied to a document in the batch, an L tag also displays – this allows a document to be coded exactly as the one before it, with one click.



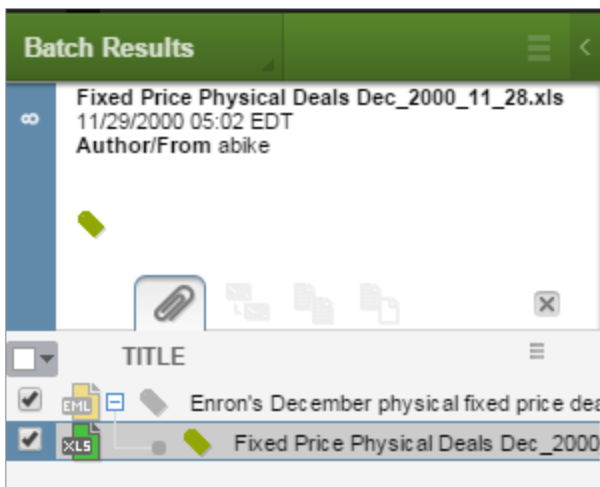
Hover on the **Quick Tag** and a preview of the associated coding displays. Click the tag to apply it.

4.1 Bulk Tag Associated Documents

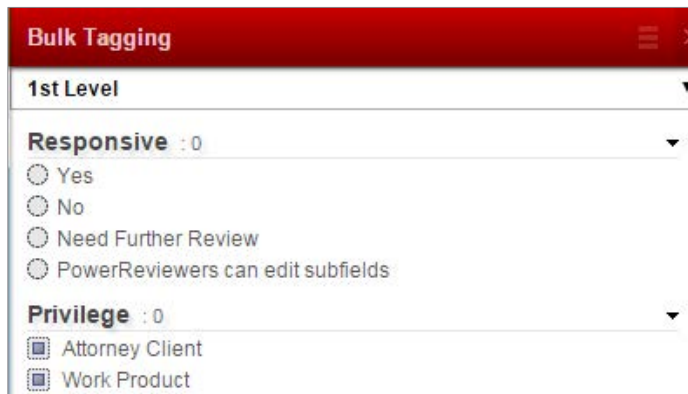
As noted above, you can use the **Associated Results View** to isolate associated documents (family members, duplicates, threads, near duplicates), to the extent they were included in the batch by the Case Manager. This is done by clicking on the associated documents icon on the record “card.”



This view shows the associated documents in a list. Power Reviewers can select multiple associated documents and apply coding to them in one action, ensuring the group is coded consistently.



Any time multiple documents are selected for coding, the **Tagging Panel** turns **RED** as a warning that your tagging action **will affect multiple documents**, and that you **could potentially overwrite existing coding** when you use the bulk tag feature.



Bulk Tagging

1st Level ▼

Responsive : 0 ▼

☐ Yes

☐ No

☐ Need Further Review

☐ PowerReviewers can edit subfields

Privilege : 0 ▼

☐ Attorney Client

☐ Work Product

When **Bulk Tagging** is activated, multi-entry and hierarchy tag values have three possible states that allow you to control whether existing coding is overwritten by the new bulk selections:

- **Solid gray** means the existing value for all selected documents will be left as is and not overwritten;
- If a box is clicked and left in a **solid white** state, that value will be cleared for all selected documents, removing any existing values;
- And if the same box is clicked again, a **checkmark** appears to indicate that value will be added to all selected documents.

Hover over the selections to confirm the state before you save bulk changes.



Bulk Tagging

1st Level

Responsive : 0

☐ Yes

☒ No

☐ Need Further Review

☐ PowerReviewers can edit subfields

This value will be cleared for all selected items

4.2 Tagging Rules

If the Case Manager has set up **Tagging Rules** for the project, you may notice you are not allowed to save coding if it does not comply with the established rule. For example, the Case Manager might set up a rule that states if a document is coded Responsive = Yes, then the Issue, Redaction Notes and Review Comment fields cannot be empty. In that case, if you code a document as responsive, you will not be able to save your coding and proceed to the next document in the batch until the conditions of the rule are met.

Accelerate provides several indicators of a **Tagging Rule** violation. The required fields are denoted with a red X, and text fields are shaded red. A red X icon also appears next to the Save buttons. Hovering over any of the X icons will tell you what is required by the rule.

The screenshot shows the 'Tagging' interface with a green header. A red arrow points to a 'Fix Error' dialog box that reads: 'Issue, Redaction Notes and Review Comment must be coded for Responsive docs!'. The main form has a '1st Level' dropdown. Under 'Responsive : 1', there are radio buttons for 'Responsive' (selected) and 'Non-Responsive'. Below that, 'Issue : 0' has three checkboxes: 'Issue A', 'Issue B', and 'Issue C', all of which are unchecked. Further down, 'Redaction Notes' and 'Review Comment' are both marked with a red X icon. Their respective text input fields are shaded red.

Once you have satisfied the tagging requirements, the red X icons disappear, and you can proceed to the next document.

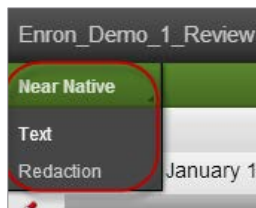
The screenshot shows the 'Tagging' interface after the requirements are satisfied. The 'Responsive : 1' section now has 'Issue : 1' with 'Issue A' checked. The 'Redaction Notes' section has a 'Revert' button and a text field containing 'No redactions needed.'. The 'Review Comment' section has a 'Revert' button and a text field containing 'May use this in the Smith depo.'. At the bottom, a green checkmark icon is highlighted by a red arrow, and the 'Save' and 'Save + Next' buttons are visible.

5 VIEWER

Accelerate's document viewer renders files in near-native format. Annotations and redactions can be applied directly to the rendered document – there is no need to TIFF convert first. Accelerate 5 offers a choice of views, used for different purposes.

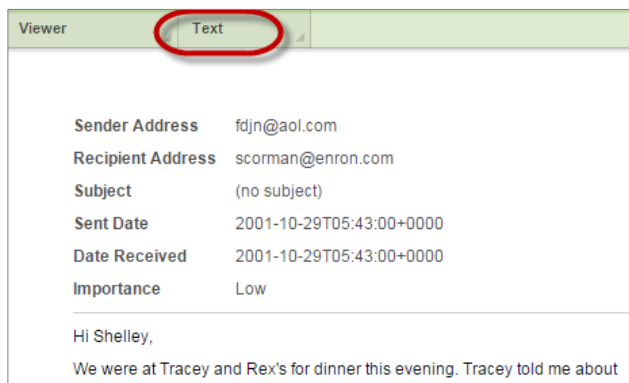
Text View	Formatted representation of text; displays very quickly and is preferred for general document exploration
Near Native View	High-fidelity view of the document featuring annotation tools to make internal notes or call out key material to other reviewers (non-producible mark-ups)
Redaction View	High-fidelity view of the document featuring redaction tools, used to obscure material for purposes of production to an opposing party; production output <u>always</u> comes from this view
Image View	Displays only for imported images or slipsheets; if an image is present, it will also populate the Redaction View
Production View	Displays only if a document has been produced before

Use the pull-down menu at the top-left of the **Viewer Panel** to toggle between the available views.

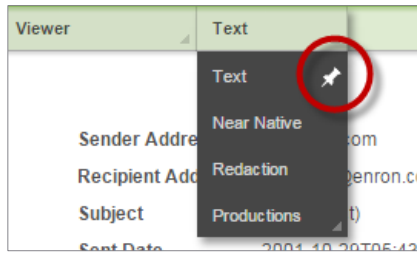


5.1 Pinning a View

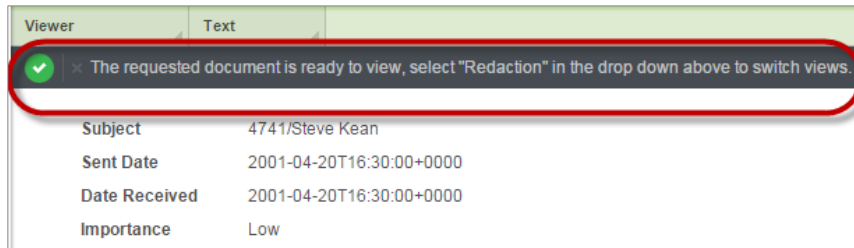
The viewer defaults to the **Text** view, which provides basic formatting and highlighting. In most cases, it serves to fully examine the document with no need to access the **Near Native** or **Redaction** views, which may take a little longer to load.



You can easily set a preference to suit the type of work in progress by “pinning” a particular view. 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.



5.2 View-specific Notes

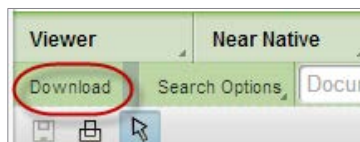
Because the **Text** view uses a different technology than the **Near Native** and **Redaction** views, highlighting may vary slightly between them. In addition, single-document printing and within document search using regular expressions are not supported on the **Text** view.

The high-fidelity **Near Native** and **Redaction Views** are usually identical except for the purposes of the mark-up the reviewer will make on each - annotations vs. redactions. *The exception is Excel documents.* The **Near Native View** shows Excel workbooks in a spreadsheet-per page view to make them easier to browse for content using the scaling tools. In **Redaction View**, they appear as they will be produced, which is a print format. The **Redaction View** can have many more pages than the **Near Native View** for Excel files.

The **Near Native** and **Redaction Views** can also be different if an imported image or slipsheet is present in the **Image View**. While the **Near Native** usually determines what displays in the **Redaction View**, it is always trumped by the presence of an image, because the image would be the desired form of the produced document.

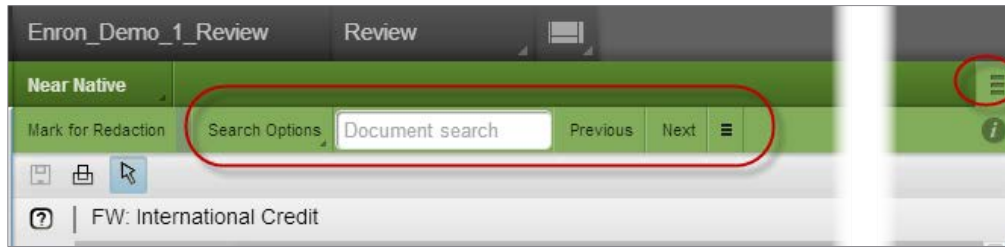
5.3 Download Natives

Open the stacked menu at the top of the **Viewer Panel**. Power Reviewers can download native files from any view by clicking the **Download** button.

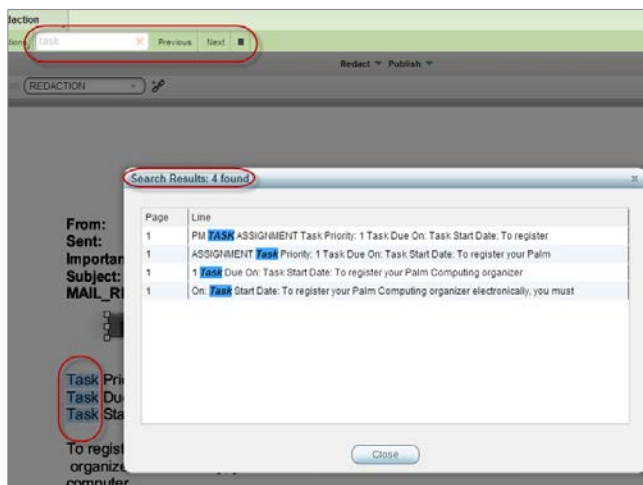


5.4 Search within a Document

The **Search Bar** is also accessed from the **Viewer Panel** stacked menu. Type in a key word or phrase and hit Enter to search within a document.

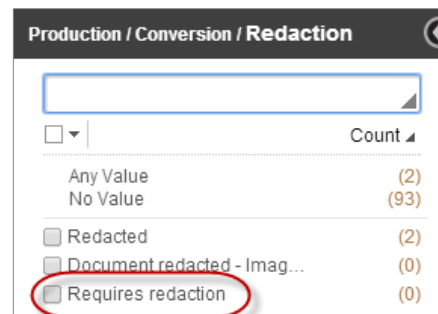
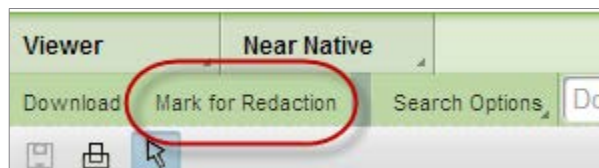


The hits are highlighted in the document, and the **Previous** and **Next** buttons allow you to jump between the hits. Click on the smaller stacked menu icon to display the search digest pop-up, where hits are shown in context and you can click on any one to jump to that hit.



5.5 Mark for Redaction

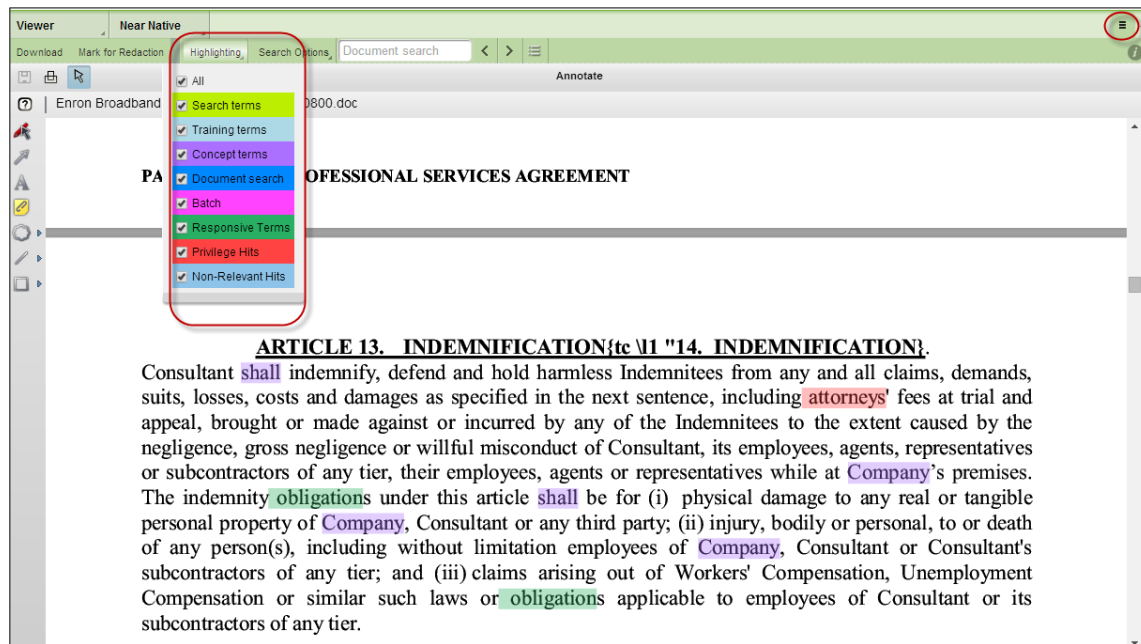
The **Mark for Redaction** tool is also found under the **Viewer Panel** stacked menu. This tool allows a document to be marked for redaction at a later time, or by another user. Marking a document for redaction populates the **Redaction Smart Filter** as *Requires Redaction*, and documents so marked can be captured easily in a search. Once a document designated as *Requires Redaction* is actually redacted, the *Requires Redaction* flag is removed and the document is then categorized as *Redacted*.



6 TEXT AND METADATA HIGHLIGHTING

There are several types of terms that may be highlighted in the currently viewed document, such as search terms, terms that categorize concept groups or customized privilege or responsiveness terms. Privilege or responsiveness highlights (also called persistent taggers) are based on lists of terms provided to your project administrator.

Highlights are available on the **Text**, **Near Native** and **Redaction** view.¹ You can specify which types of highlights you'd like displayed via the **Highlighting** drop-down list, available under the stacked menu in the **Viewer Panel**. By default, all highlight types except **Concept Terms** are active, but you may disable any you do not find useful by simply unchecking the category.

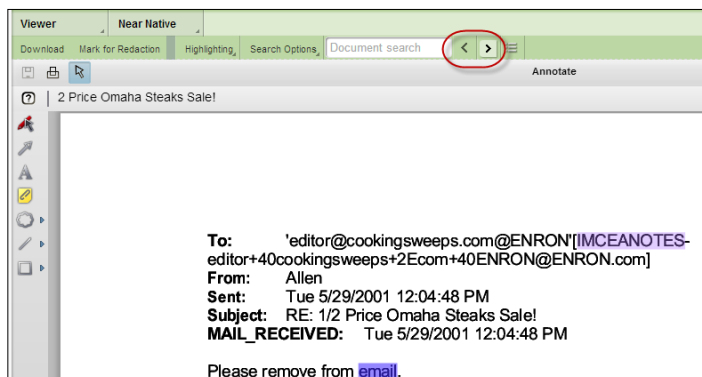


The most frequently used highlighting types are:

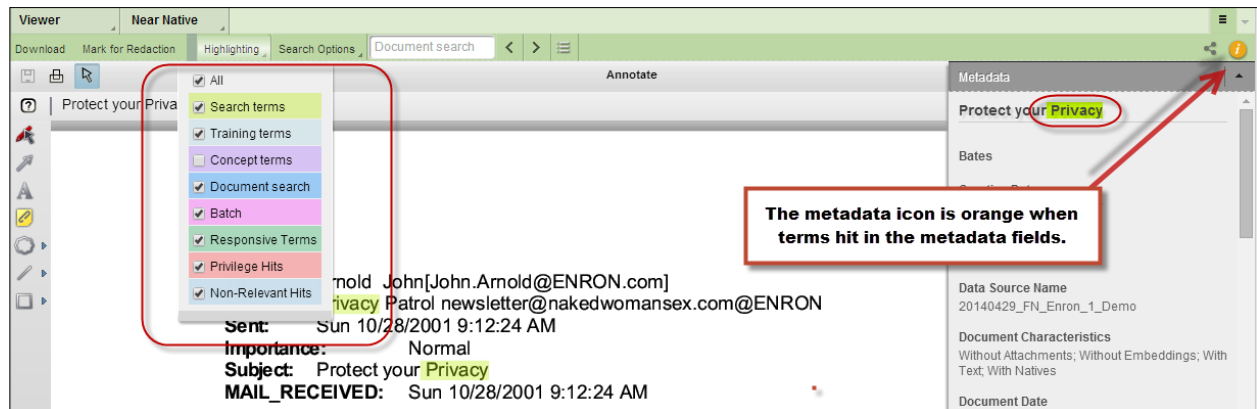
¹ If an image is present for a record, it will overwrite the Redaction View and highlights will not be displayed for Redaction View.

Highlight Type	Description
Search Terms	Search hits are highlighted from Smart Filters, Quick Search, or Advanced Search.
Concept Terms	Terms associated with Concept Groups are highlighted.
Document Search	Terms entered via the within document search tool (as opposed to global search tools) are highlighted.
Responsive Terms	Customized highlights based on a list of project-specific terms. In addition to highlighting your custom terms with the document view, hits can be searched using the Responsive Hits Smart Filter . Also known as Smart Taggers or persistent highlighting.
Privilege Hits	Customized highlights based on a list of project-specific terms. In addition to highlighting your custom terms with the document view, hits can be searched using the Privilege Hits Smart Filter . Also known as Smart Taggers or persistent highlighting.

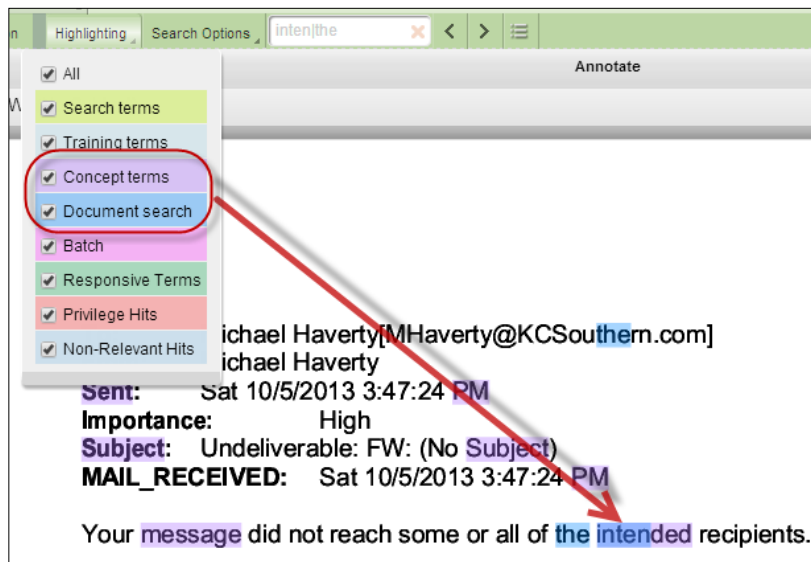
You can navigate between highlighted terms using the arrow buttons on the **Viewer** panel.



The power of highlighting is available in a document's metadata as well. When any highlighted terms (e.g., document search, concept terms, installed taggers, etc.) are present in metadata fields, the metadata icon that appears at the top of the **Viewer** panel will display in orange, instead of default green. In the metadata fly-in, terms will appear highlighted within the metadata fields, in the color that corresponds to the type of highlight.



Words or phrases that meet more than one highlighting criterion display highlighted in multiple colors in the text, as a visual cue of the multiple hits. If the *entire* word or phrase is highlighted because it fits in two highlighting categories, both category colors will be laid over the hit. For example, if a word is a **Responsive Term** hit and a **Search** hit, the respective dark green and light green of those categories will be laid over the word so that it appears in a third, more vibrant green shade. If only a portion of a word is a hit for two categories, the highlighting will appear as shown below. This feature is not available for metadata highlights.



7 ANNOTATION AND REDACTION TOOLS

Accelerate 5 offers a wide variety of powerful annotation and redaction tools.

Scaling tools are found at the bottom of the **Viewer Panel**. The default is **Fit to Width**, though any zoom level set by the user persists across multiple pages, documents and projects, until it is changed. Other tools available:

- Rotate
- Fit All

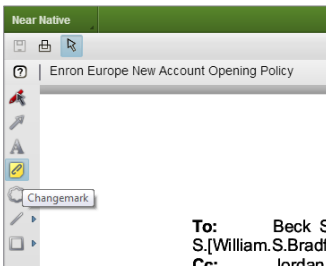
- Zoom In/Out
- Pan
- Zoom Area



7.1 Annotations

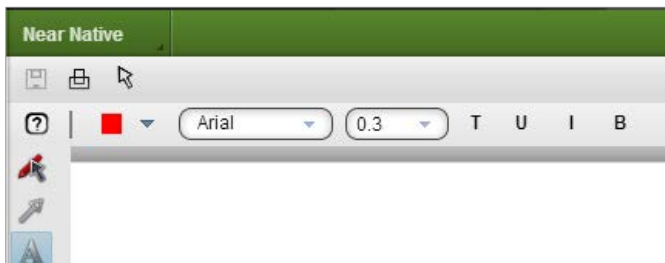
The **Near Native View** is used for annotations, and that is where you will find annotation tools. Most of the tools are self-explanatory - document to call attention to something important. Hover over the icons to see a tool tip if you forget what any one tool is used for. The annotation tools are:

- Select
- Arrow Pointer
- Text
- Changemark Note
- Cloud/Highlight
- Lines
- Shapes

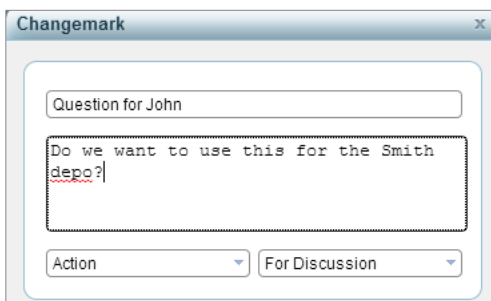


they allow you to draw shapes on the something important. Hover over the forget what any one tool is used for.

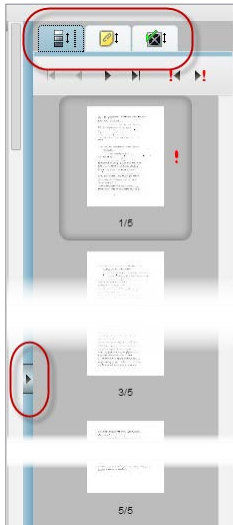
Once you've selected an annotation tool, additional options become available to allow you to change the color of any annotation or affect text.



The **Changemark Note** feature allows you to make a note on a document, give the note a title and designate action on the note. Other users can see the note when they click on the same document, and they can add a reply to it.

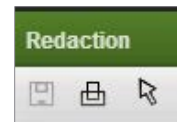


Expand the **Thumbnail View** by clicking the arrow on the right side of the **Viewer Panel**. The first tab of the **Thumbnail View** shows a page-by-page rendering of the document, and any annotated pages will be noted with a red exclamation mark. The second tab displays **Changemark Notes** on the document and content is searchable.



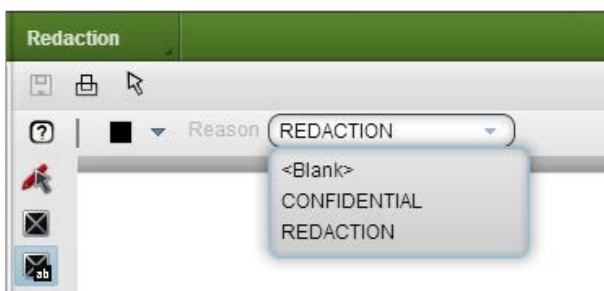
7.2 Redactions

The **Redaction View** is used for redactions, and that is where you will find redaction tools. Basic tools are found at the top of the panel.



- **Save:** Save redactions while review of the doc is in progress - optional. Redactions save automatically as you move from page to page or document to document.
- **Print:** Print the page, exactly as it appears, to your local printer or save as PDF.
- **Select:** Mouse over any redaction to see the time and date the redaction was applied, the user who applied it, and what **Redaction Reason** was specified. Note that **Redaction Reason** does not display on the redaction in the **Viewer** – redactions display in draft mode so the text beneath can be read without moving the redaction.

Click on any redaction tool to show the **Redaction Reason** menu. By default, a new project has *Confidential* and *Redaction* verbiage available for selection as **Redaction Reasons**, which appear as text on top of the redaction when it is published or produced. There is also an option for blank redactions (no text). Custom redaction text may be added by the project administrator as needed. **Redaction Reason** is sticky, document-to-document.

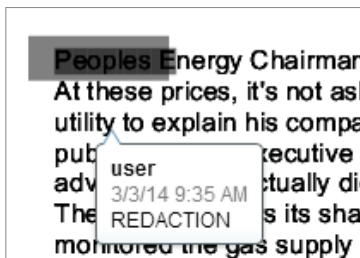


The available redaction tools are:

- **Select Redaction:** Used to select a redaction for editing or deletion.



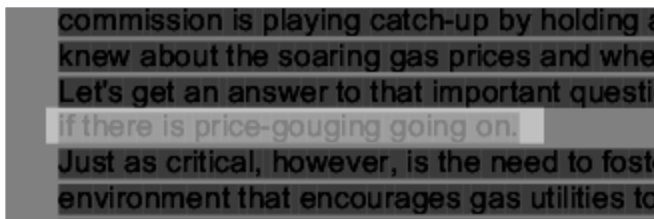
- **Redact Area:** Most commonly used. The extracted text that will be removed at production time can be seen through the redaction – no need to move the redaction block to peek beneath it. Use the **Select** tool to verify the **Redaction Reason** applied.



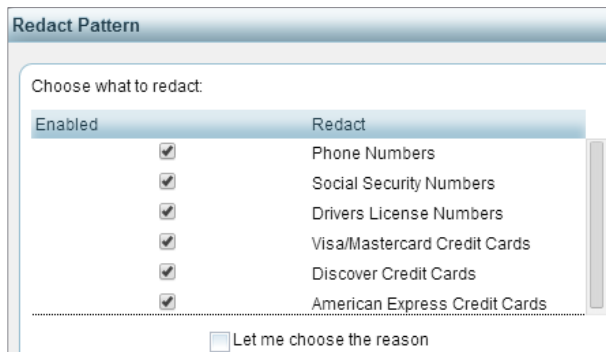
- **Redact Text:** Draw a square around any word or phrase to redact it, and any other instances of that exact word or phrase, within the current document.



- **Allow Area:** Draw a redaction or apply full page redaction, then use this tool to carve out an un-redacted area within.



- **Redact Privacy Information:** Enable redactions for particular numeric patterns of information within the current document. There is an option to allow selection of a **Redaction Reason** for each kind of recognized pattern. The system will default to the last applied **Redaction Reason** if no selections are specified. Once you click OK, the system will scan the document and report on the number of results for each pattern that was enabled. Since this functionality is based on pattern matching, the results should be checked carefully to make sure only the intended information was redacted. For example, phone numbers are found based on a numerical pattern xxx-xxx-xxxx. If there happens to be other numbers in the document with an xxx-xxx-xxxx pattern, the system will see that pattern as a phone number and redact it.



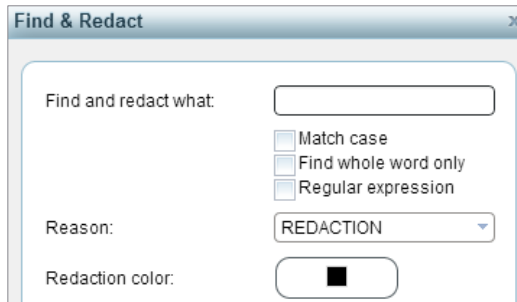
Redact Pattern

Choose what to redact:

Enabled	Redact
<input checked="" type="checkbox"/>	Phone Numbers
<input checked="" type="checkbox"/>	Social Security Numbers
<input checked="" type="checkbox"/>	Drivers License Numbers
<input checked="" type="checkbox"/>	Visa/Mastercard Credit Cards
<input checked="" type="checkbox"/>	Discover Credit Cards
<input checked="" type="checkbox"/>	American Express Credit Cards

☐ Let me choose the reason

- **Find & Redact:** Enter a word or phrase to redact every instance of that word or phrase within the current document, with the **Redaction Reason** and color specified.



Find & Redact

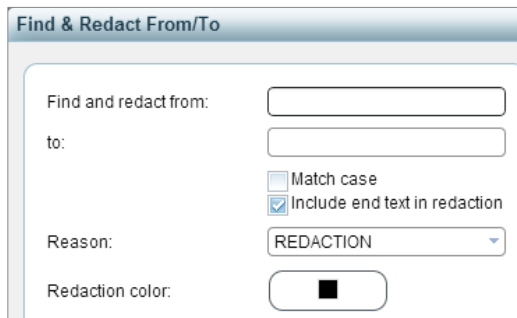
Find and redact what:

☐ Match case
☐ Find whole word only
☐ Regular expression

Reason: REDACTION

Redaction color:

- **Find and Redact From/To:** Specify a beginning and ending word to have the system redact those words and any content in between, with the **Redaction Reason** and color specified. The results should be checked carefully to make sure only the intended information was redacted.



Find & Redact From/To

Find and redact from:

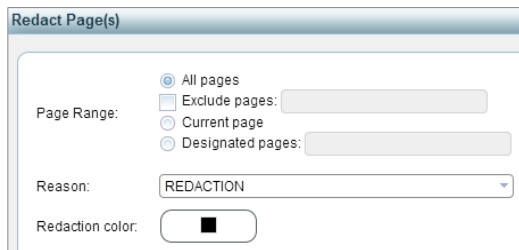
to:

☐ Match case
☒ Include end text in redaction

Reason: REDACTION

Redaction color:

- **Redact Page:** Redact entire pages of the current document, excluding specific ones as needed, with the **Redaction Reason** and color specified. This can be used with the **Redact Area** tool to carve out an area from the page that should not be redacted.

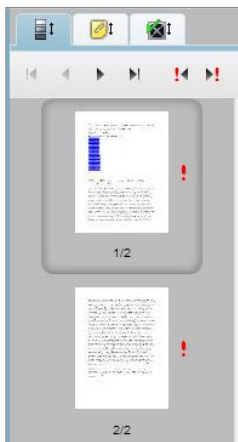


The 'Redact Page(s)' dialog box contains the following elements:

- Page Range:** Includes radio buttons for 'All pages' (selected), 'Exclude pages:', 'Current page', and 'Designated pages:'. There are text input fields for 'Exclude pages:' and 'Designated pages:'.
- Reason:** A dropdown menu currently showing 'REDACTION'.
- Redaction color:** A color selection button showing a black square.

To remove redactions, use the **Select Redaction** tool to activate the redaction, then hit Delete or right-click on the selected redaction and click **Delete**. Note that redactions made in bulk, such as with the **Find & Redact** tool, must be removed one-by-one.

The **Thumbnail View** functions on the **Redaction View** just as it does on the **Near Native View**, but here, it displays redactions instead of annotations. The third tab allows you to search for redactions of a particular color or **Redaction Reason**.



Two SmartFilters, **Redaction Color** and **Redaction Reason**, allow for redaction searching across an entire batch.

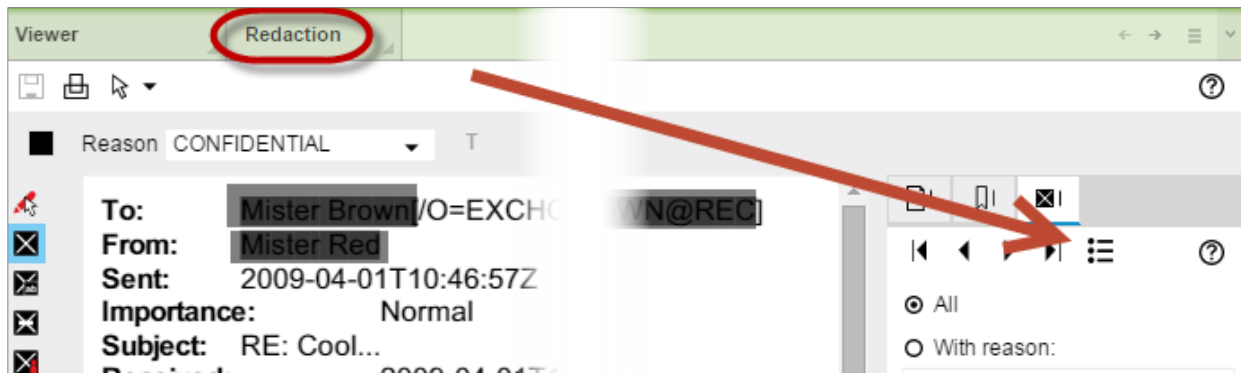


The 'Work Product' filter menu is shown with the following items:

- Load Batch Name
- Batch
- Non-Relevant Hits
- Workflows
- Redaction Color** (circled in red)
- Redaction Reason** (circled in red)

7.3 Redaction Audit Tool

Use the **Redaction Audit** tool to easily validate or change multiple redactions within a document. The **Redaction Audit** tool is accessible in the Redaction view for documents that have redactions applied.



The **Redaction Audit** window displays a list of the redactions within the current document, in the order they appear. The redacted text is presented transparently, and within the context of the immediately surrounding text. This allows for a quick perusal of the existing redactions. The page on which the redaction appears is also listed, and you can click on any entry in the list to be jumped to that redaction within the document itself. The total number of redactions within the document appears at the top of the window.

Verify Results: 13

<input type="checkbox"/>	Page	Redacted Text
<input type="checkbox"/>	1	From: Mister Red Sent: 2009-04-01T10:46:57Z Importance: Normal Subject: RE: Cool... Received: 2009-04-01T10:47:54Z I would, but I
<input type="checkbox"/>	1	To: Mister Brown O=EXCHORG/OU=FIRST ADMINISTRATIVE GROUP/CN=RECIPIENTS/CN=MR.BROWN@REC] From: Mister Red Sent: 2009-04-01T10:46:57Z Importance: Normal Subject: RE: Cool...
<input type="checkbox"/>	1	ADMINISTRATIVE GROUP/CN=RECIPIENTS/CN= MR.BROWN@REC] From: Mister Red Sent: 2009-04-01T10:46:57Z Importance: Normal Subject: RE: Cool... Received: 2009-04-01T10:47:54Z
<input type="checkbox"/>	1	Sorry. From: Mister Brown Sent: Wed 4/1/2009 4:43 AM To: Mister Red Subject: RE: Cool... Sorry, you
<input type="checkbox"/>	1	AM To: Mister Red Subject: RE: Cool... Sorry, you don't have one. I only know "Lady in
<input type="checkbox"/>	1	you... Ms. Blue and I will meet in a few moments to listen to "my"
<input type="checkbox"/>	1	us? From: Mister Red Sent: Wed 4/1/2009 4:38 AM To: Mister Brown Subject: RE: Cool... Wow, how
<input type="checkbox"/>	1	To: Mister Brown Subject: RE: Cool... Wow, how cool is this? I'm jealous... Want to have
<input type="checkbox"/>	1	tool Red From: Mister Brown Sent: Wed 4/1/2009 4:37 AM To: Mister Red Subject: Cool...
<input type="checkbox"/>	1	From: Mister Brown Sent: Wed 4/1/2009 4:37 AM To: Mister Red Subject: Cool... Red, Did you
<input type="checkbox"/>	1	AM To: Mister Red Subject: Cool... Red, Did you know that there is a song about me?
<input type="checkbox"/>	1	Cool... Red , Did you know that there is a song about me? pretty cool, aight?
<input type="checkbox"/>	1	aight? Red

Unredact Change ☐ Show Reasons

The **Show Reasons** option at the bottom right of the window allows you to see the redaction reason in an additional column.

<input type="checkbox"/>	Page	Redacted Text	Reason
<input type="checkbox"/>	1	From: Mister Red Sent: 2009-04-01T10:46:57Z Importance: Normal Subject: RE: Cool... Received: 2009-04-01T10:47:54Z I would, but I	CONFIDENTI
<input type="checkbox"/>	1	To: Mister Brown O=EXCHORG/OU=FIRST ADMINISTRATIVE GROUP/CN=RECIPIENTS/CN=MR.BROWN@REC] From: Mister Red Sent: 2009-04-01T10:46:57Z Importance: Normal Subject: RE: Cool...	CONFIDENTI
<input type="checkbox"/>	1	ADMINISTRATIVE GROUP/CN=RECIPIENTS/CN= MR.BROWN@REC] From: Mister Red Sent: 2009-04-01T10:46:57Z Importance: Normal Subject: RE: Cool... Received: 2009-04-01T10:47:54Z	CONFIDENTI
<input type="checkbox"/>	1	Sorry. From: Mister Brown Sent: Wed 4/1/2009 4:43 AM To: Mister Red Subject: RE: Cool... Sorry, you	CONFIDENTI
<input type="checkbox"/>	1	AM To: Mister Red Subject: RE: Cool... Sorry, you don't have one. I only know "Lady in	CONFIDENTI
<input type="checkbox"/>	1	you... Ms. Blue and I will meet in a few moments to listen to "my"	CONFIDENTI
<input type="checkbox"/>	1	aight? -brown	CONFIDENTI

[Unredact](#) [Change](#) ☒ Show Reasons

The **Unredact** link at the bottom left of the window allows you to instantly remove one or more redactions. Entries must be selected in the list to activate the **Unredact** link. Simply select the redactions to be removed, and click **Unredact** to complete the action.

<input type="checkbox"/>	Page	Redacted Text
<input checked="" type="checkbox"/>	1	From: Mister Red Sent: 2009-04-01T10:46:57Z Import
<input checked="" type="checkbox"/>	1	ADMINISTRATIVE GROUP/CN=RECIPIENTS/CN= MR Subject: RE: Cool... Received: 2009-04-01T10:47:54Z
<input checked="" type="checkbox"/>	1	Sorry. From: Mister Brown Sent: Wed 4/1/2009 4:43 A
<input type="checkbox"/>	1	AM To: Mister Red Subject: RE: Cool... Sorry, you don't
<input type="checkbox"/>	1	you... Ms. Blue and I will meet in a few moments to liste
<input type="checkbox"/>	1	us? From: Mister Red Sent: Wed 4/1/2009 4:38 AM To:
<input type="checkbox"/>	1	To: Mister Brown Subject: RE: Cool... Wow, how cool i
<input type="checkbox"/>	1	tool -red From: Mister Brown Sent: Wed 4/1/2009 4:37
<input type="checkbox"/>	1	From: Mister Brown Sent: Wed 4/1/2009 4:37 AM To: f
<input type="checkbox"/>	1	AM To: Mister Red Subject: Cool... Red, Did you know
<input type="checkbox"/>	1	Cool... Red , Did you know that there is a song about m
<input type="checkbox"/>	1	aight? -brown

[Unredact](#) [Change](#)

The **Change** link allows you to change the redaction reason or redaction color for one or more entries. Select one or more of the entries to activate the **Change** link. Choose the new reason or color the selected redactions should change to, and click OK.

<input type="checkbox"/>	Page	Redacted Text
<input checked="" type="checkbox"/>	1	From: Mister Red Sent: 2009-04-01T10:46:57Z Importance: Normal Subject: RE: Cool... Received: 2009-04-01T10:47:54Z I would,
<input checked="" type="checkbox"/>	1	ADMINISTRATIVE GROUP/CN=RECIPIENTS/CN= MR.BROWN@REC] From: Mister Red Sent: 2009-04-01T10:46:57Z Importance: Normal Subject: RE: Cool... Received: 2009-04-01T10:47:54Z
<input checked="" type="checkbox"/>	1	Sorry. From: Mister Brown Sent: Wed 4/1/2009 4:43 AM To: Mister Red Subject: RE: Cool... Sorry, you
<input type="checkbox"/>	1	AM To: M Subject: RE: Cool... Sorry, you don't have one. I only know "Lady in
<input type="checkbox"/>	1	you... Ms. and I will meet in a few moments to listen to "my"
<input type="checkbox"/>	1	us? From:
<input type="checkbox"/>	1	To: Miste
<input type="checkbox"/>	1	tool -red
<input type="checkbox"/>	1	From: Mis
<input type="checkbox"/>	1	AM To: M
<input type="checkbox"/>	1	Cool... Re
<input type="checkbox"/>	1	aight? -br

Edit Redactups

Selected 3 of 12:

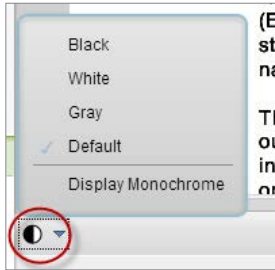
Reason: **CONFIDENTIAL**

Color: **■**

[OK](#) [Cancel](#)

7.4 Background Color Toggle

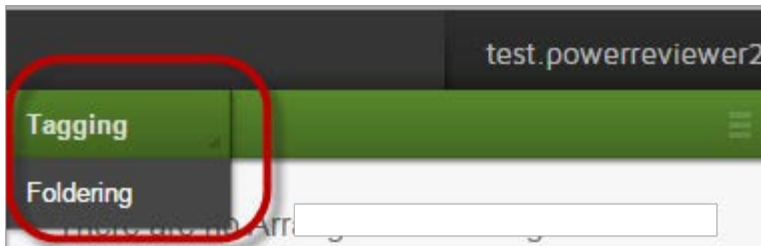
Use the **Background Color** toggle, found at the lower left corner of the **Viewer Panel**, to discover white text on a white background by viewing the background as black or gray. This tool is also helpful for viewing layers in AutoCAD files.



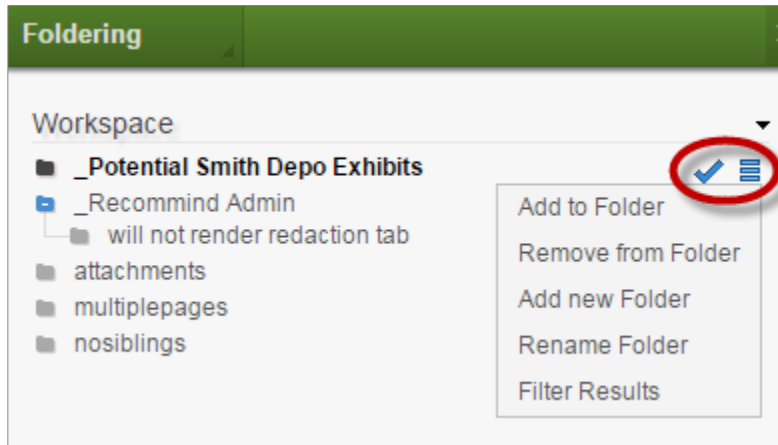
8 FOLDERING DOCUMENTS

Often, the Case Manager will set up some folders so that, as you review documents, you may “bucket” them for purposes of printing, use as deposition exhibits, or other such needs not strictly related to tagging.

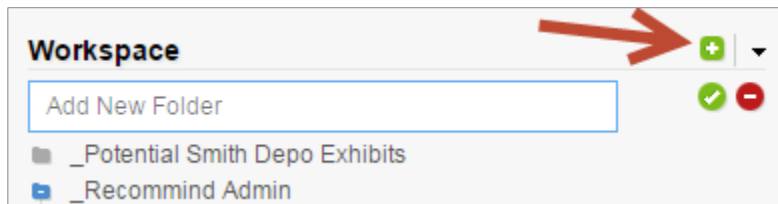
If enabled, you will notice the ability to toggle from the **Tagging** panel to a different panel called **Folding**.



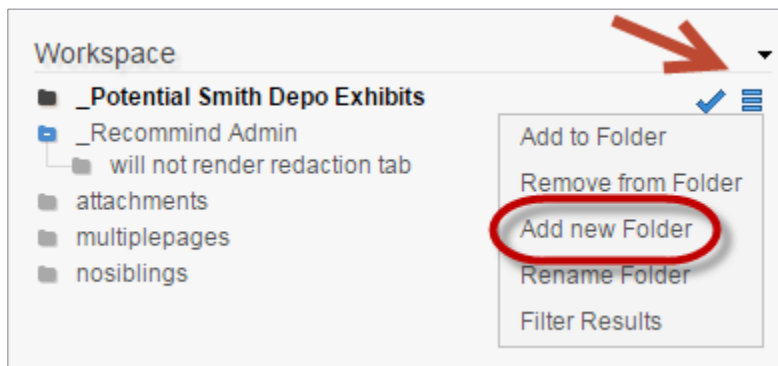
Power Reviewers have rights to add or rename folders, place documents inside a folder, and to remove documents from a folder. Reviewers have all of these rights as well, except the ability to create and rename folders. All users can filter to the results contained in a folder, which automatically applies a **Smart Filter** for the *Workspaces* field, for the selected folder. To the extent those results are in the Reviewer’s current batch, they will be displayed.



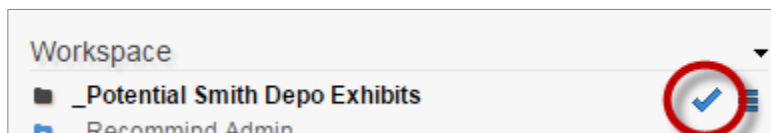
To add a new top-level folder, hover near the top of the panel until the Add icon appears. Click it and type the name of your new top-level folder. Click the checkmark icon to finalize folder creation.



To create a subfolder, click on the stacked menu for the folder you in which you want to nest your new folder.

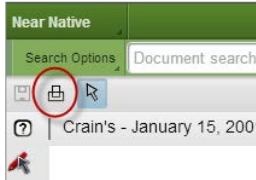


Placing documents inside of a folder is as simple as selecting them, and clicking the checkmark next to the target folder.

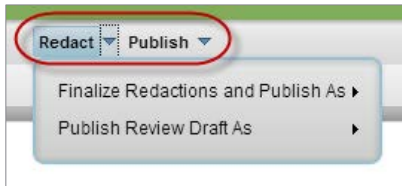


9 PRINTING

Use the simple **Print** icon on any view to print the document exactly as displayed.

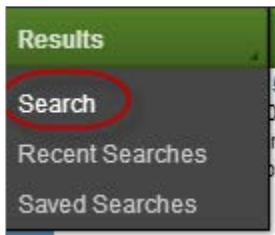


In the **Redaction View**, the **Redact/Publish** options in the center of the viewer allow a document to be exported in PDF or TIFF format with redactions hidden, in draft mode (underlying text visible), or as “finalized” (redactions are opaque and redaction text displays, as it would if the document were being produced).



10 SEARCHING

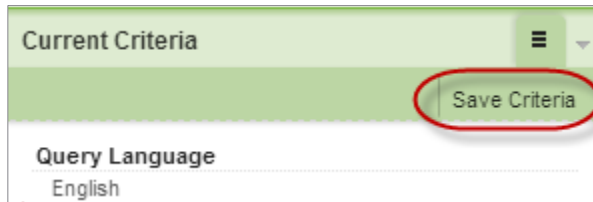
Toggle the **Results** menu to enter search mode.



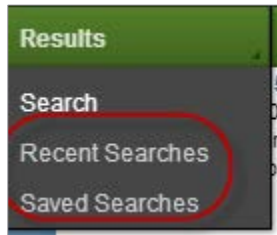
Accelerate features **Smart Filters** to help you narrow down to the data of interest. The **Smart Filter** categories of most interest to a Reviewer user for within-batch investigation are:

- **Analytics:** Explore common concepts/phrases in the batch
- **Date:** Explore a particular date range in the batch
- **Email:** Isolate documents to and/or from a particular sender/recipient
- **Email Properties:** View emails flagged as Important
- **Work Product:** Isolate responsive or privilege term hits, to the extent used in the project
- **Review Fields:** Review coding decisions made in the batch so far

Search criteria may be stacked to achieve the desired results (e.g., a search for documents within a certain date range may be added to a search for a specific key word) - it displays in the **Current Criteria** sub-panel. Expand the **Stacked Menu** in the sub-panel to save a search.

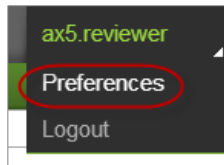


Toggle the **Results** menu again to access **Saved Searches** and **Recent Searches**.



11 USER PREFERENCES

Access **User Preferences** in the drop-down menu under your name, in the top-right area of the screen.



The preferences you set for yourself are sticky across all projects to which you have access.

- **Results per page:** Default is 20
- **Time zone:** Affects local display only – does not affect underlying metadata or native display
- **Date/time format :** Affects local display only – does not affect underlying metadata or native display

12 SESSION TIMEOUT

For security purposes, Axcelerate 5 automatically logs a user out of his session after 30 minutes of inactivity.