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01. BUSINESS INTELLIGENCE: CROSS-MATTER DASHBOARDS

Accelerate's **Business Intelligence** (BI) modules allow for quick evaluation of project data. The BI dashboards are equipped with pre-configured Sheets that can be quickly adjusted to specific criteria as desired. Sheets can be easily copied, edited, and saved for user-driven, customized reporting with a wide range of visualizations. Bookmarks let individual users automatically filter the data to their personal preferences with a single click.

There are two cross-matter BI dashboards available to Case Manager users by default, the **Portfolio Dashboard** and the **Efficiency Score Dashboard**. A Productivity Dashboard is optionally available on a per project basis, and is covered in a separate guide.

The **Portfolio Dashboard** helps you visualize the status of all matters in your portfolio from a number of angles. Which cases are more, or less, active? Where is the bulk of un-reviewed data? Are those projects sufficiently staffed compared to end-of-lifecycle projects? The **Portfolio Dashboard** delivers the answers and lets you customize reports to hone in on exactly what you need to know to maximize review progress.

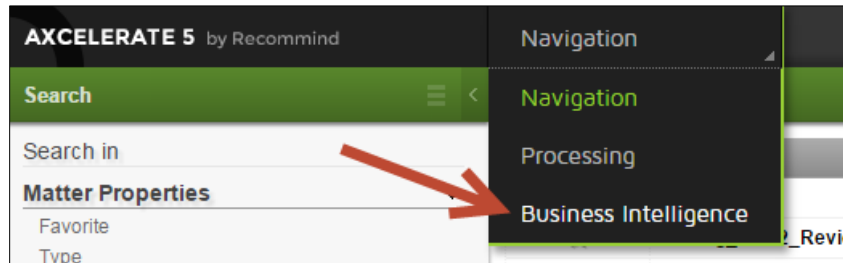
The **Efficiency Score Dashboard** provides powerful cross-matter metrics on cull rates, data set responsiveness and the efficacy of various prioritization approaches. Are there particular techniques that perform well, and should be used more often? Are there techniques that are underperforming and should be avoided? Using this dashboard, you can gauge how efficient a review is, and understand which strategies may help make it more effective.

02. ACCESS THE CROSS-MATTER DASHBOARDS

The Portfolio Dashboard and the Efficiency Score Dashboard are accessed via the **Matter List**, where a **Business Intelligence** link to displays in the **Pages** menu.

This special page is available only to Case Managers who have access to at least one Review & Analysis project, or with access to at least one ECA project.

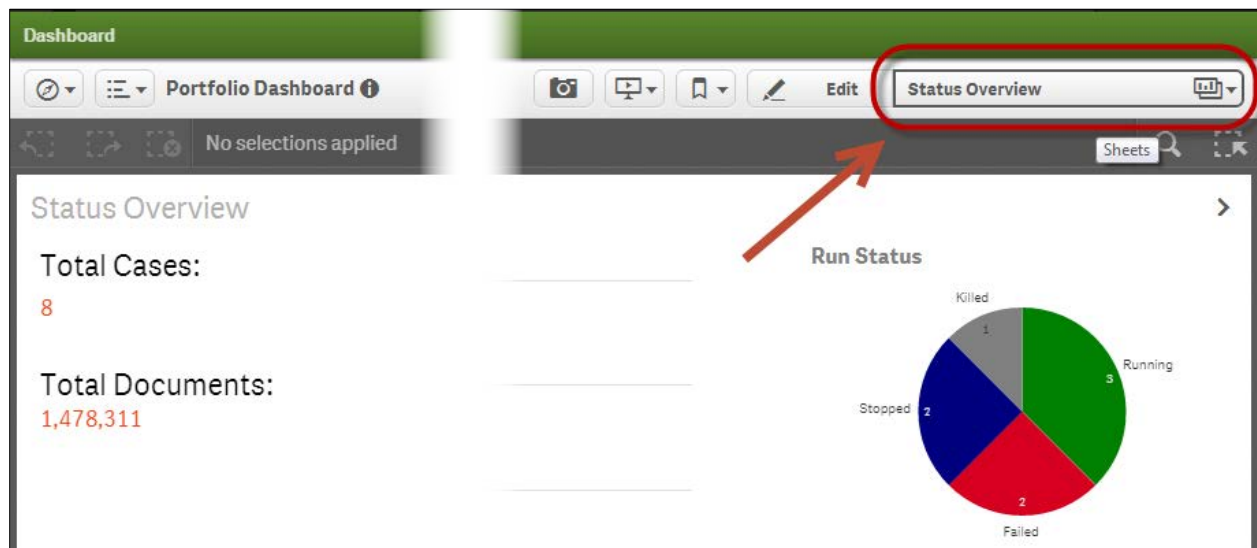
- Users will see no ECA information unless they have at least Administrator or Standard permissions to the respective ECA case.
- If a user has different permissions across R&A projects, information is displayed only for those projects in which the user has Case Manager rights.



03. BUILT-IN, APPROVED SHEETS

The **Portfolio** and **Efficiency Score Dashboards** offer several built-in, “approved” Sheets, or report templates. Section 5 and 6 provide an overview of the content of the approved Sheets available to the respective dashboards.

Click the **Sheets menu** to see the list of built-in Sheets.

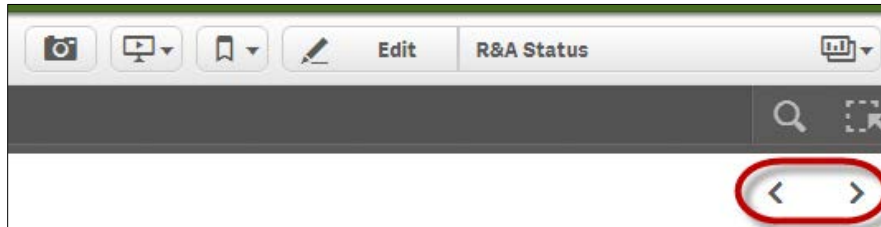


No customization is needed to immediately put the template Sheets to work for you. These Sheets are created by Recommend to work right out of the box, and address the majority of the business questions Case Managers ask in evaluating their reviews.

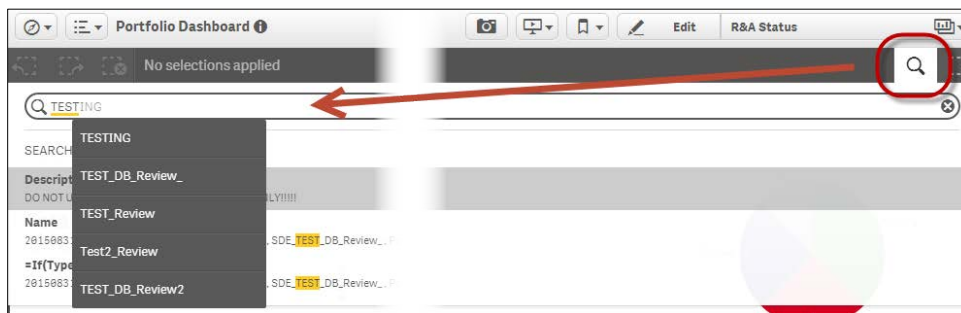
The approved Sheets cannot be modified by any user, so they always remain pristine and ready-to-use, though you may incorporate and customize elements of these templates into personalized Sheets, detailed below.

04. NAVIGATION BASICS

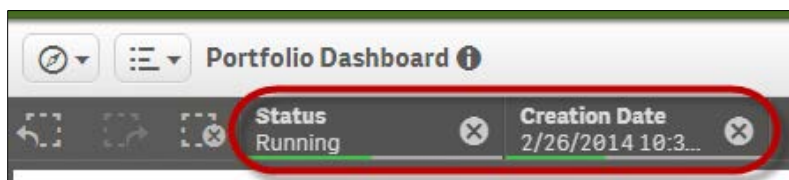
Sheet-to-Sheet navigation buttons are located at the top right of the screen. Use these buttons to browse through the Sheets. If you have specific search criteria applied, you can browse through each Sheet to see how it is affected by the filter(s).



Use the **search tool** to input field names or field values to set up filters for your Sheets, e.g., filter all of your Sheets to show statistics for one particular project. Once you begin typing some search criteria, matching results will be suggested.

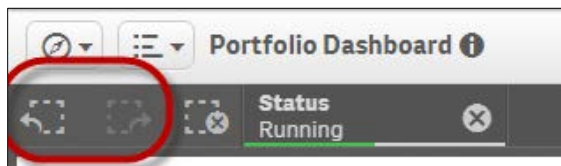


Applied filters display in the header so you can always see them at a glance. Multiple filters can be stacked on top of one another, to achieve the desired level of granularity.

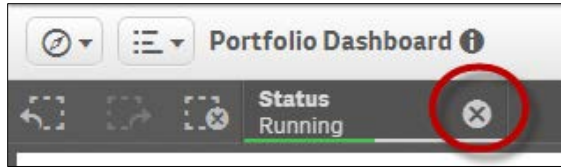


Once applied, filters affect all graphs on the current Sheet and any other Sheet you may navigate to within your current session, so you don't have to re-apply them as you move from Sheet to Sheet.

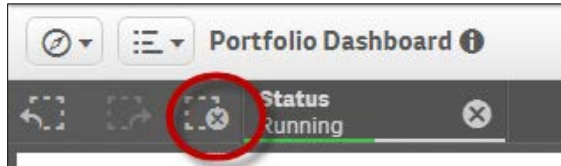
Use the **Step Back** and **Step Forward navigation buttons** to shift back and forth in time, to see what filters you have applied at various points.



Remove individual filters using the X icon beside the displayed filter criteria.



To remove all of the filters at one time, use the **Clear All Selections** button.



It's easy to apply filters from within a single Sheet as well. To do this, drag your mouse over the area of interest in the graph. Once the filter is set up, click the green **Confirm** button to apply it, or discard it with the red button. If confirmed, the graph updates to show the desired granularity.



Apply additional filters using the grid that displays to the left of the Sheet.

Case Creation Details

Total Cases:
2

Total Documents:
326,987

Name

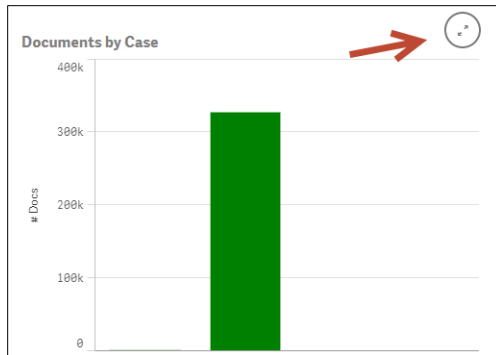
Type

Status

Running ✓

Not Running

Use the arrows icon at the top right of each graph to expand it for closer examination.



When a Sheet has more data points that can be displayed at once, a slider bar is shown beneath it to allow for scrolling through all of the data.



You can also use the roller ball on your mouse to scroll through data in a graph.

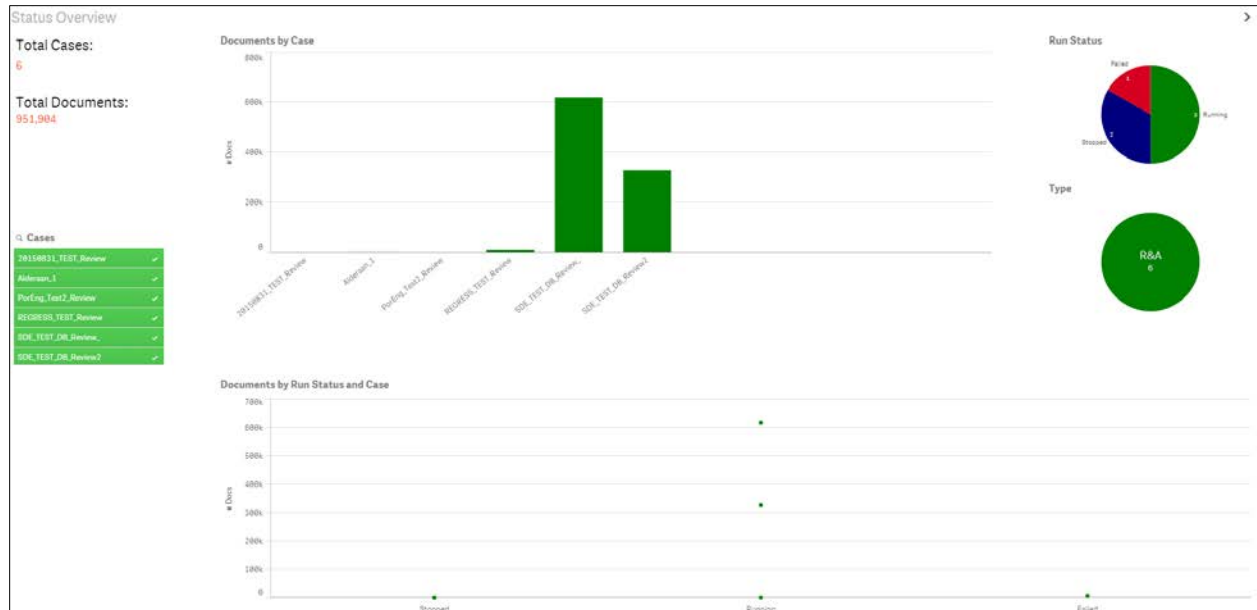
05. APPROVED SHEETS IN THE PORTFOLIO DASHBOARD

Each of the built-in, approved sheets has been specifically designed to answer portfolio status questions.

Status Overview

Provides a high-level look at the all of the cases in the user's portfolio, including number of documents per case, case type and run status.

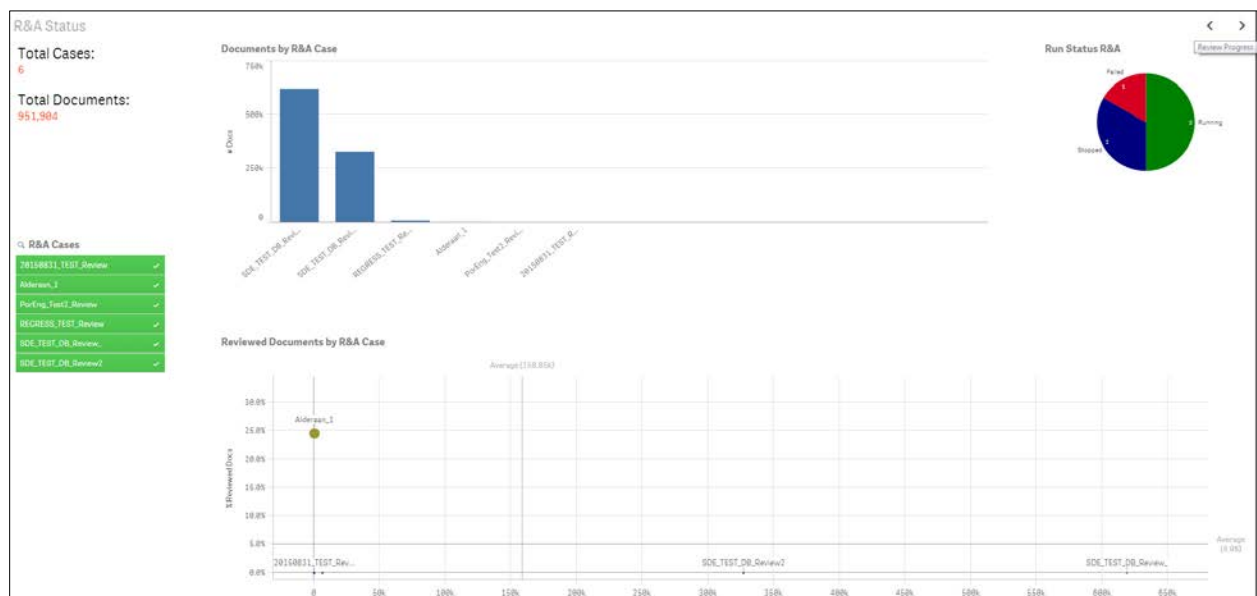
- Documents by Case
- Documents by Run Status and Case
- Run Status
- Type of Case (ECA or R&A)



R&A Status:

Provides the number of documents for each R&A, with additional insight into the number of documents reviewed so far in each project.

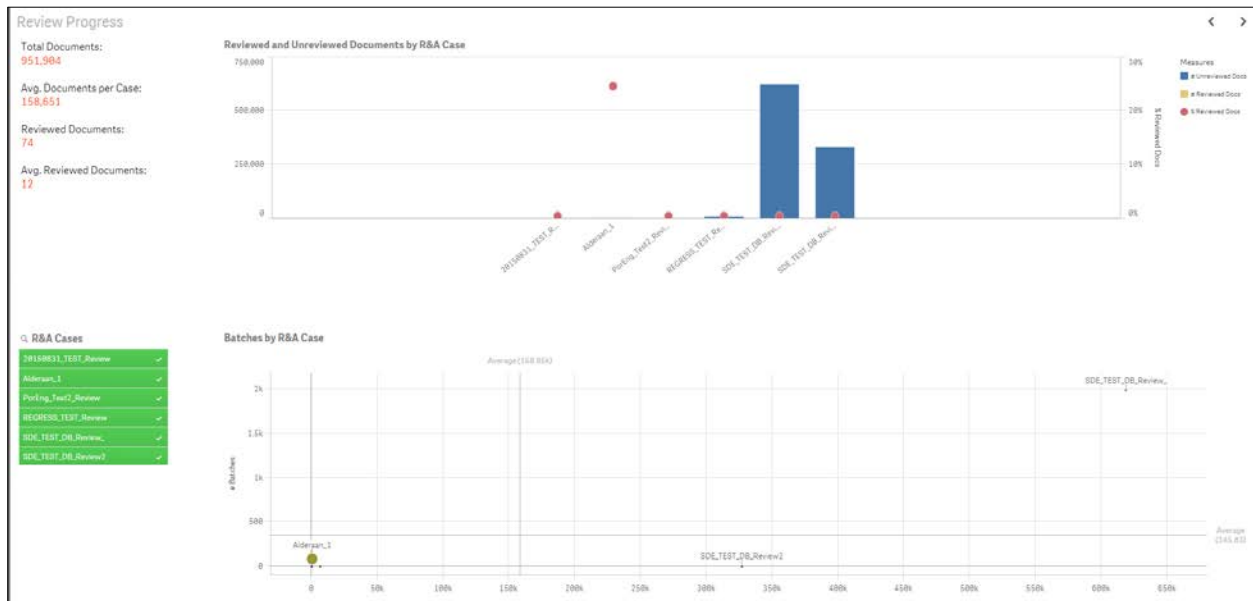
- Documents by R&A Case
- Reviewed Documents by R&A Case
- Run Status R&A



Review Progress

Provides a breakdown of the average and number of un-reviewed vs. reviewed documents in each R&A project, as well as the number of batches in each.

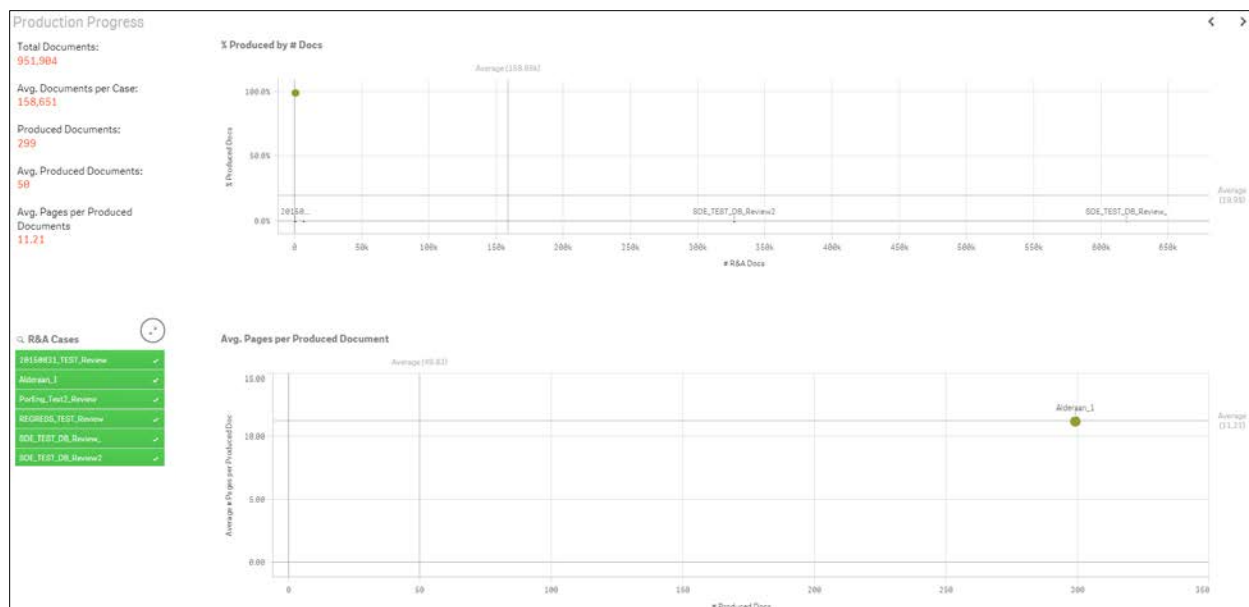
- Reviewed and Un-reviewed Documents by R&A Case
- Batches by R&A Case



Production Progress

Provides a breakdown of the average and number of produced documents in each case, as well as the average and number of produced pages.

- % Produced by # Docs
- Avg. Pages per Produced Document



Case Creation Details

Overview of the number of cases created per month, and the percentage of documents reviewed and produced by month of case creation.

- # Cases by Month of Case Creation
- % Reviewed and Produced by Month of Case Creation



Details

A grid display of the case information presented graphically on the other sheets, along with the Axcelerate version information and any project description if it exists.

Name	Status	Type	# Docs	Creation Date	# Reviewed Docs	% Reviewed Docs	# Batches	# Produced Docs	% Produced Docs	# Produced Pages	Description	AXC Version
20150831_TEST_Review	Not Running	R&A	0	8/31/2015 11:07:24 PM	0	-	0	0	-	0	-	AXC5
Alderaan_1	Running	R&A	301	2/26/2014 10:30:50 AM	74	24.58	84	299	99.34	3352		AXC5
PortEng_Test2_Review	Not Running	R&A	56	8/13/2015 5:28:26 PM	0	0.00	0	0	0.00	0	-	AXC5
REGRESS_TEST_Review	Not Running	R&A	6410	10/01/2015 10:01:57 PM	0	0.00	0	0	0.00	0	-	AXC5
SDE_TEST_DB_Review_	Running	R&A	618451	8/6/2015 1:00:18 AM	0	0.00	1001	0	0.00	0	DO NOT USE THIS DB FOR YOUR TESTING SDE ONLY!!!!!!	AXC5
SDE_TEST_DB_Review2	Running	R&A	326686	8/19/2015 3:04:37 AM	0	0.00	0	0	0.00	0	-	AXC5

Help

Defines the measures and dimensions seen throughout the Portfolio Dashboard.

Available Dimensions	Predefined Measures
<p>Dimensions can be imagined as columns and allow slicing and dicing of the data.</p> <p>Available for all cases</p> <p># Docs The number of documents in the case.</p> <p>Status The status shows if the application hosting the respective case is running.</p> <p>Only available for matters of type R&A</p> <p># Batches The number of review batches that exist for the case.</p> <p># Produced Docs The number of produced documents for the case. Documents produced multiple times are only counted once.</p> <p># Produced Pages The number of produced document pages for the case. Documents produced in native format only are not counted as a produced page.</p> <p># Reviewed Docs The number of documents assigned to any review state.</p> <p>% Reviewed Docs The percentage of documents in the case that have already been reviewed.</p> <p>% Produced Docs The percentage of documents in the case that have already been produced.</p>	<p>Measures are counts. They are calculated from expressions.</p> <p>Average # Pages per Produced Doc Average number of pages of the documents produced for a case (see #Produced Pages dimension). Should usually be between 8 and 10.</p>

06. APPROVED SHEETS IN THE EFFICIENCY SCORE DASHBOARD

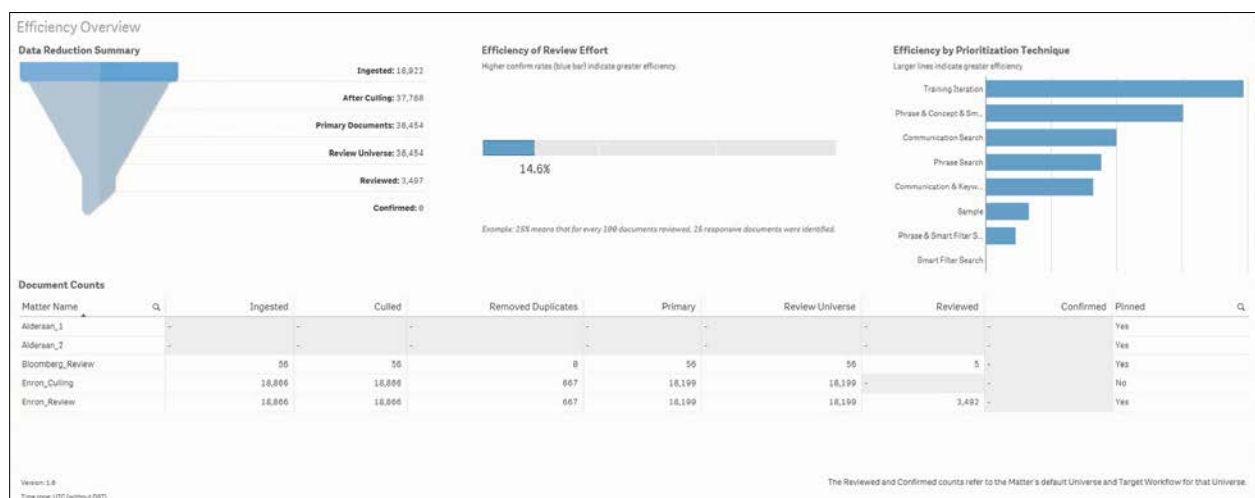
Each of the built-in, approved sheets has been specifically designed to answer review efficacy questions.

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.

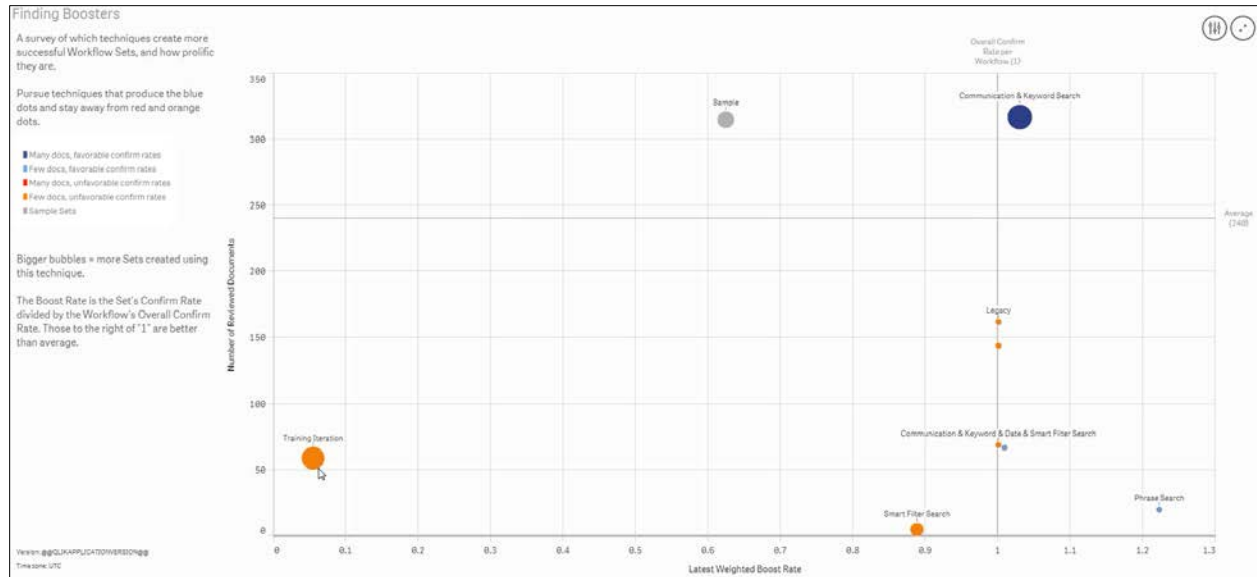
Efficiency of Review Effort: A bar chart that illustrates overall efficiency based on the overall confirmation rate; gives an indication of how many documents require eyes-on review to find a truly responsive one. A higher percentage means fewer documents need human review and thus indicate an efficient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



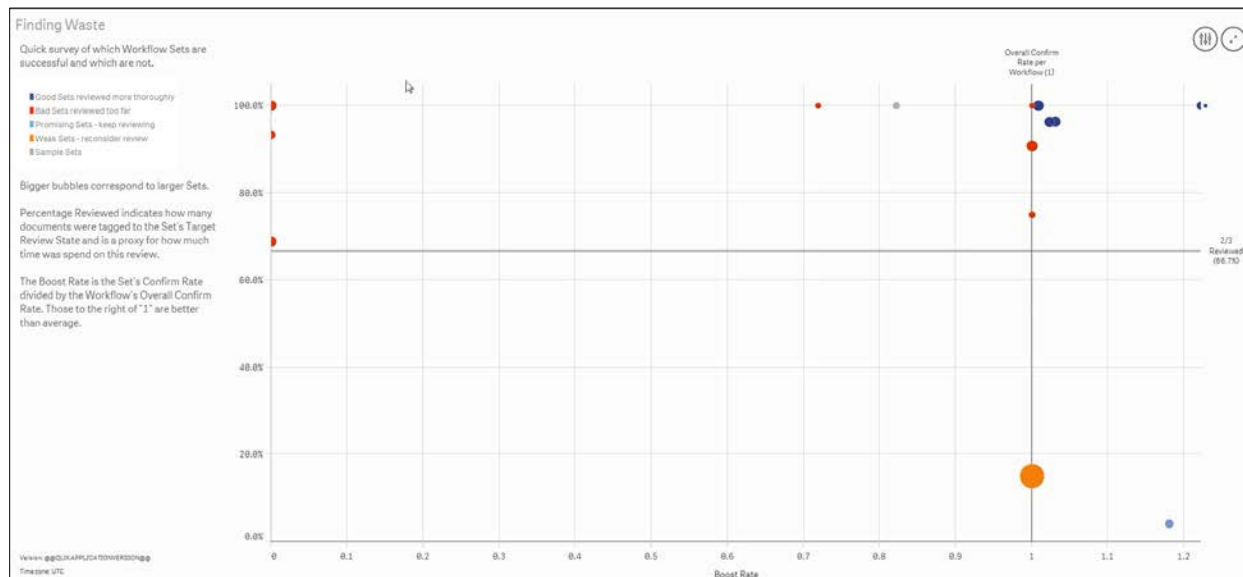
Finding Boosters

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.



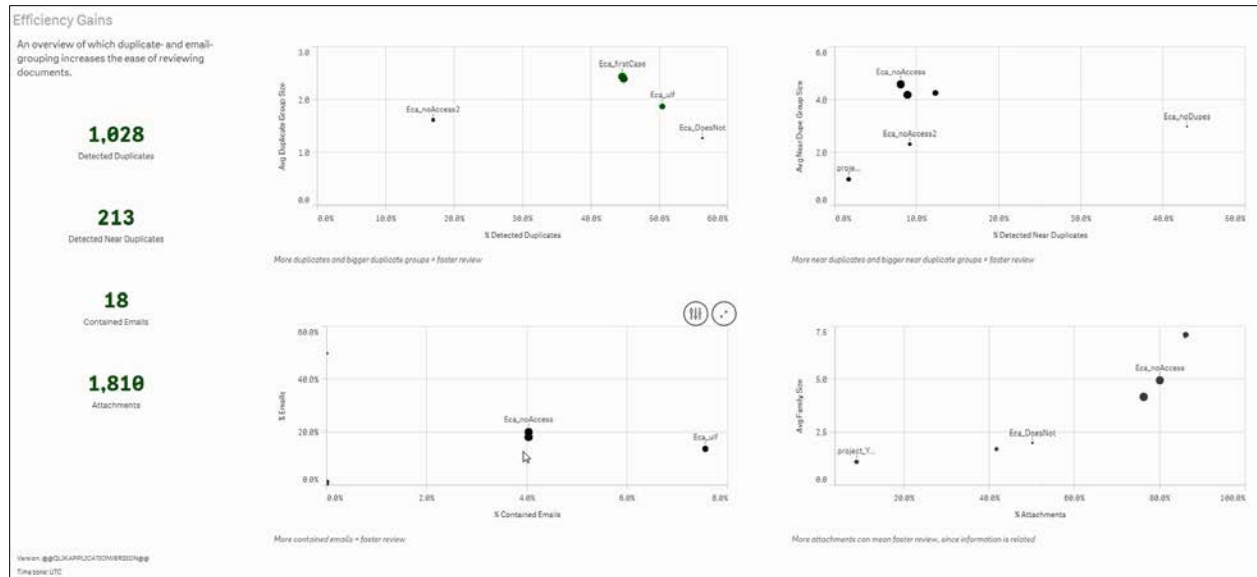
Finding Waste

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.



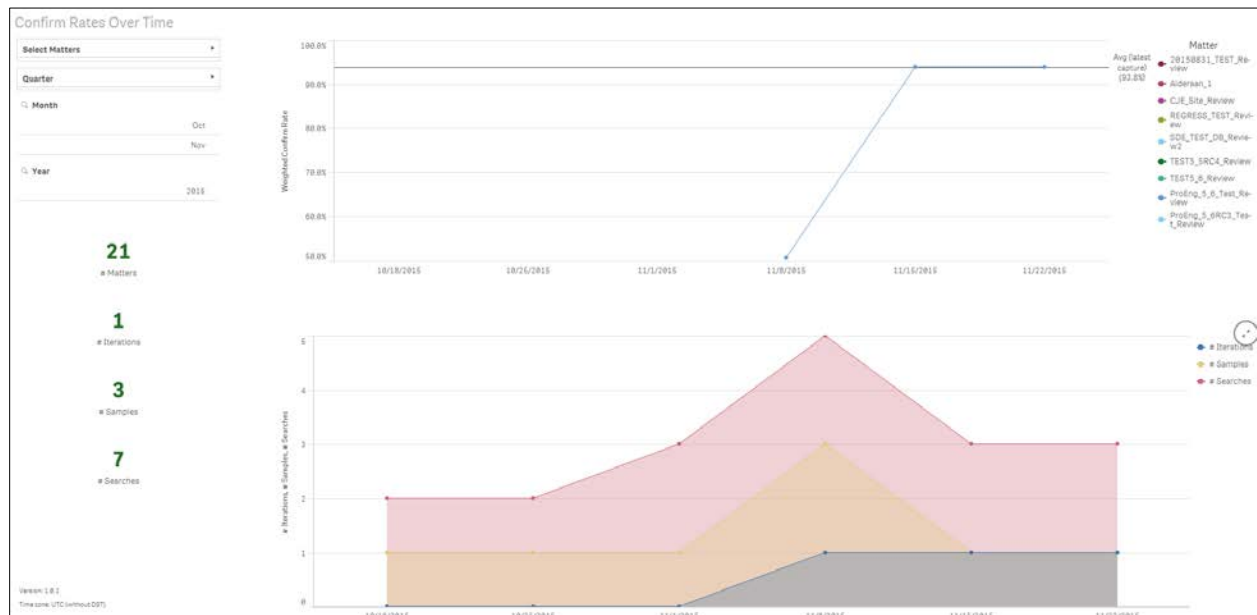
Efficiency Gains

An overview of efficiency gains achieved via Axcelerate features such as family, duplicate and near duplicate detection, and end-of-branch email threading detection.



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.



Help

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

Help

Available Dimensions

Dimensions can be imagined as columns and allow slicing and dicing of the data. When creating your own charts, only use dimensions that are available within the same context. That is, do not mix dimensions from "Available for Nodes", "Available for Capture Runs", "Available for All Matters" and "Available for Data Reductions".

AVAILABLE FOR NODES

A node is a static or dynamic collection of documents, such as a Universe, Workflow, Training Iteration, Search, Sample or Result Set.

Accelerator Score

Within a Universe, the confirm rate of the node divided by the confirm rate of the default Sample with the same Target Review State as the node. Indicates how well a node is performing compared to similar Samples.

Boost Rate

Within a Universe, the confirm rate of the node divided by the confirm rate of the Workflow with the same Target Review State as the node. Indicates how well a node is performing compared to similar Workflows.

Confirmed Documents

The number of reviewed documents that are tagged to the Tagging Value of the Workflow. Only available when a Target Review State is defined for the Workflow.

Creation Time

The date and time of creation of the node.

Creator

The user that created the node.

Documents

The number of documents in the node.

Is Default

Flag whether the node is a default node (e.g., a default Workflow or default Sample).

AVAILABLE FOR CAPTURE RUNS

A capture run collects all nodes and derives all their values for a specific Matter.

Capture Run Date or Time

The date / time of the collection process that captured all the nodes for a Matter.

Matter Documents

The number of documents in the Matter. This count corresponds to 100% for all the percentage values below.

Duplicate Groups

The number of duplicate groups. Each two documents with the same hash-code belong to one group.

or % Detected Duplicates

The number / percentage of duplicated documents. Four documents in a duplicate group will be counted as three detected duplicates and the one that remains. A duplicated document (e.g., email attachment) will get similar importance in each email.

or % Unique Documents

The number / percentage of unique documents. Any document that doesn't have a duplicate counts as unique, and each duplicate group counts as one unique document.

Near Duplicate Groups

Same as # Duplicate Groups, but for Near Duplicates.

or % Detected Near Duplicates

Same as # or % Detected Duplicates, but for Near Duplicates.

or % Documents without Near Duplicate

The number / percentage of documents that have no near duplicate in the Matter.

Predefined Measures

Measures are counts. They are calculated from expressions.

Iterations

The number of Training Iterations.

Matters

The number of distinct Matters.

Result Sets

The number of Result Sets that belong to a specific Search.

Samples

The number of distinct Samples. The default Sample that occurs in every Workflow will be counted only once.

Searches

The number of Searches.

Sets

The number of Result Sets, Samples and Training Iterations.

Weighted Confirm Rate

The mean of the Confirm Rate across the selected sets. Computed as the sum of all confirmed documents divided by the number of all reviewed documents.

Weighted Boost Rate

The mean of the Boost Rate across the selected sets. The number of reviewed documents is used as the weight. As a result, the Boost Rate for document sets with a high number of reviewed documents has a larger impact on the weighted average.

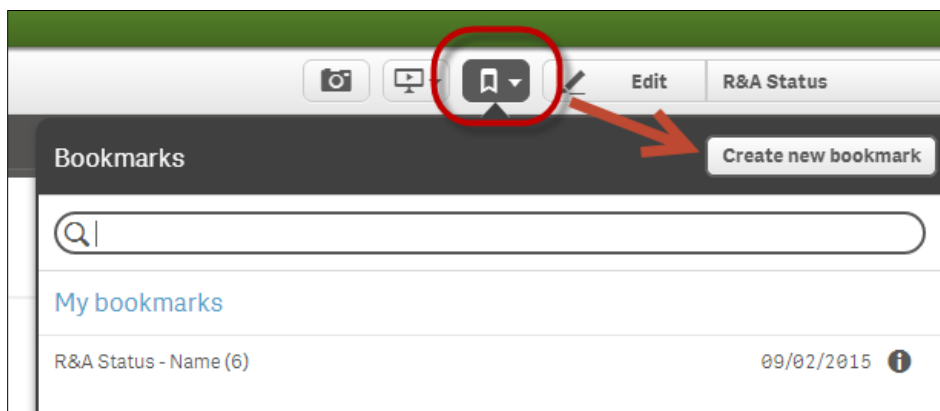
Weighted Accelerator Score

The mean of the Accelerator Score across the selected sets. The number of reviewed documents is used as the weight. As a result, the Accelerator Score for document sets with a high number of reviewed documents has a larger impact on the weighted average.

07. CREATE BOOKMARKS

Bookmarks are saved filters that allow you to quickly jump to a customized point-of-view. You can create an unlimited number of Bookmarks to achieve reporting specificity.

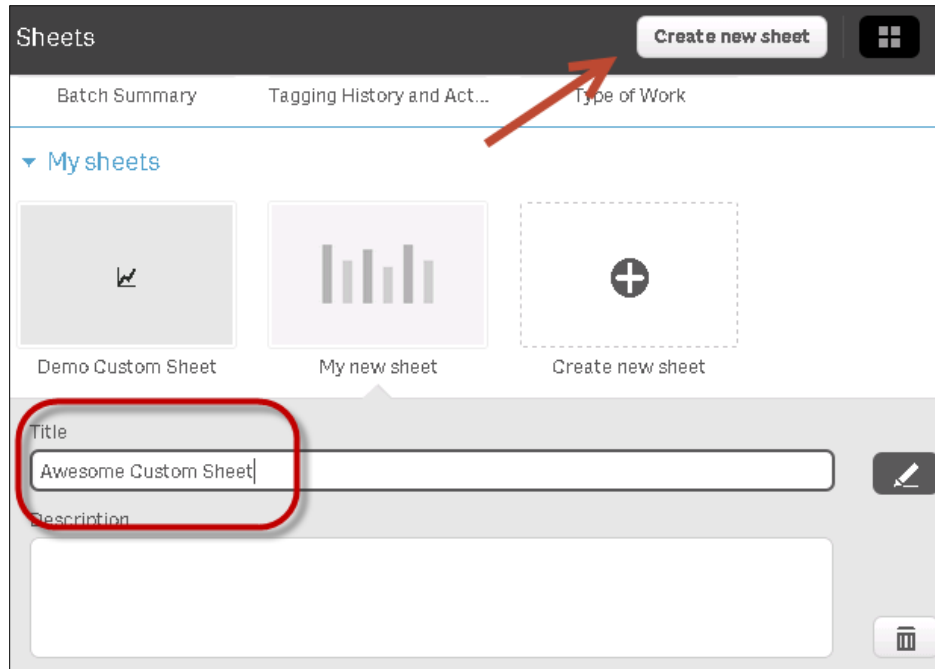
Start with any Sheet and add one or more filters that define what you're looking for. For example, you may want to use the Status Overview Sheet to see information on just two or three of your projects. Once you've refined the approved Sheet to display that information, click **Create Bookmark** to set up the filter. Add a descriptive **Title** to help you remember the significance of the bookmark.



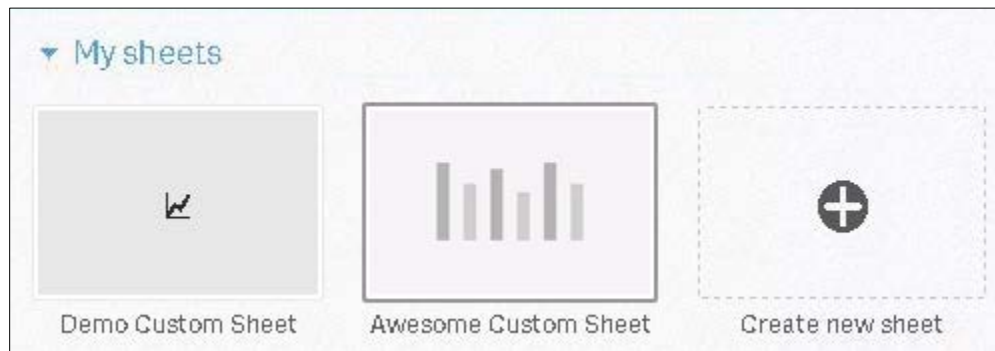
08. CREATE A CUSTOM SHEET

You can easily create a custom Sheet that combines any of the dimensions and measures from the approved Sheets.

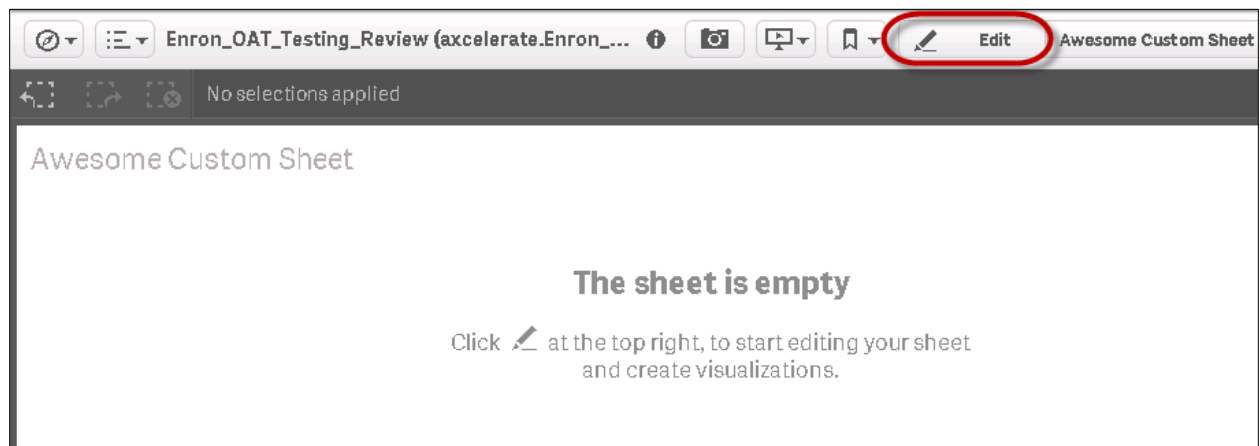
Access the main **Sheet menu**, and click the **Create** button. Give your new Sheet a descriptive name when prompted.



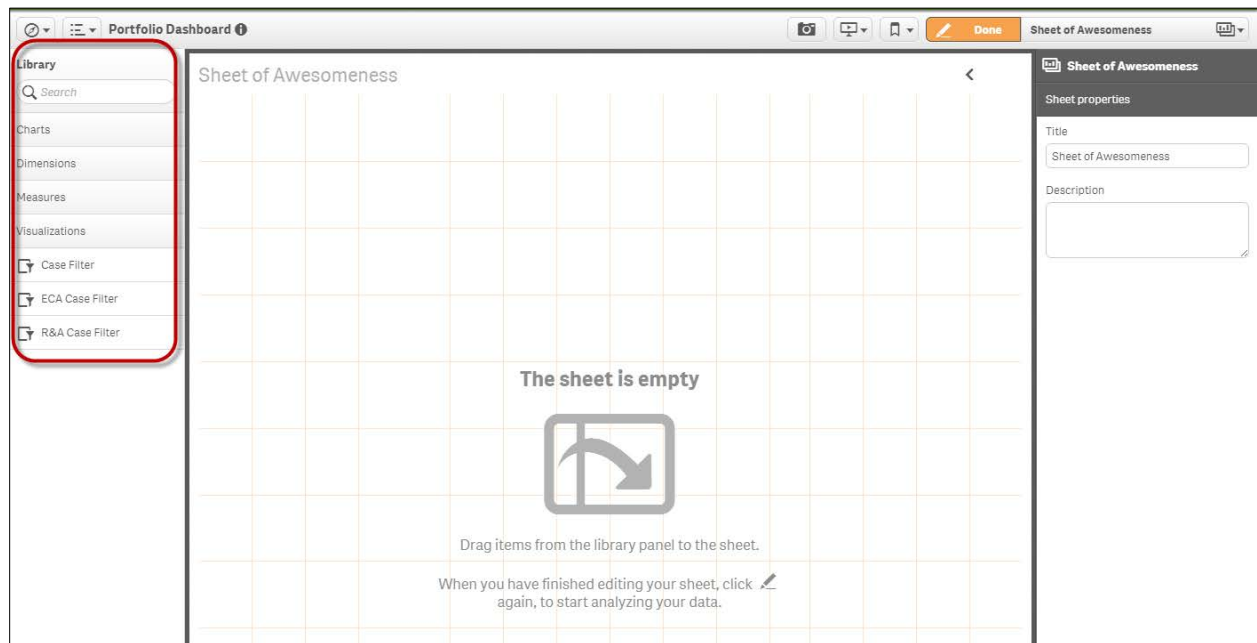
Click anywhere to generate the new Sheet. An icon representing your custom Sheet will appear in the **My Sheets** category of the Sheet list. Click on the icon to open the new sheet.



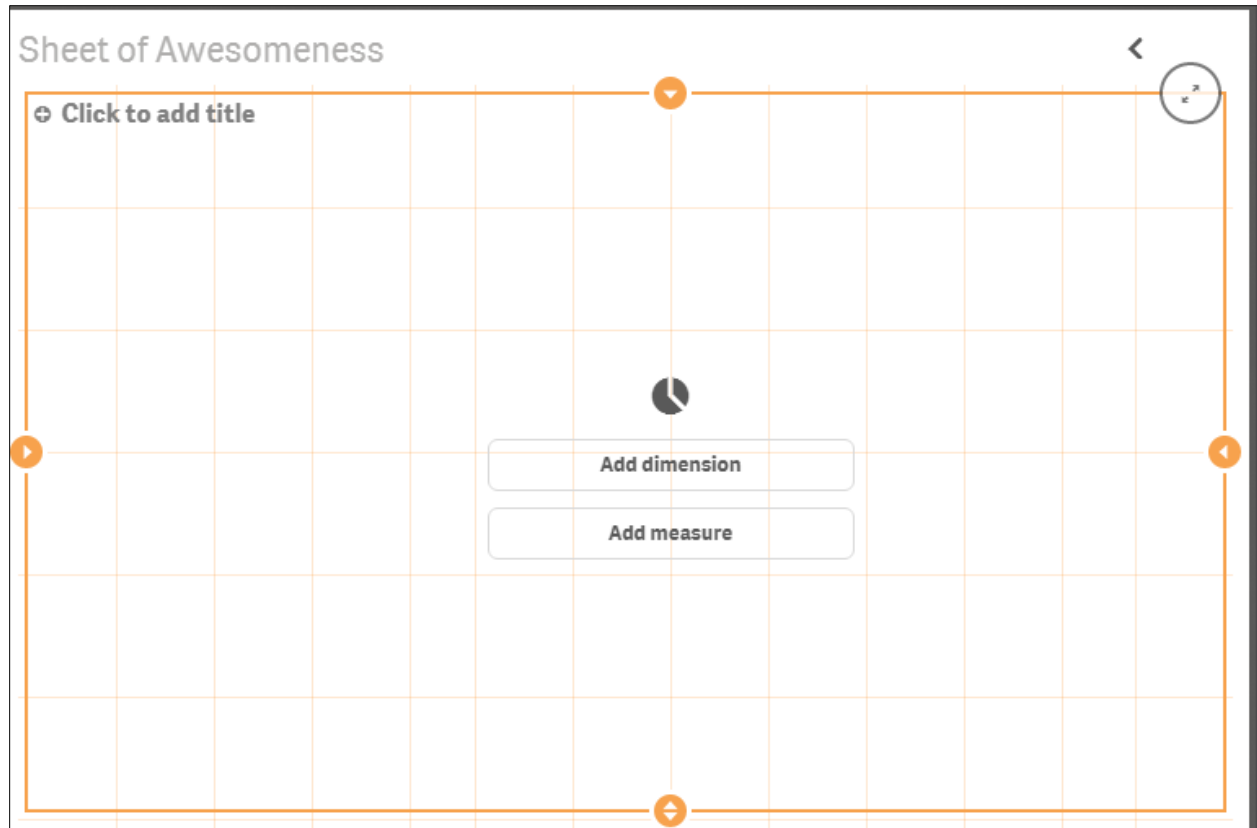
Next, click the **Edit** button to get started building the content.



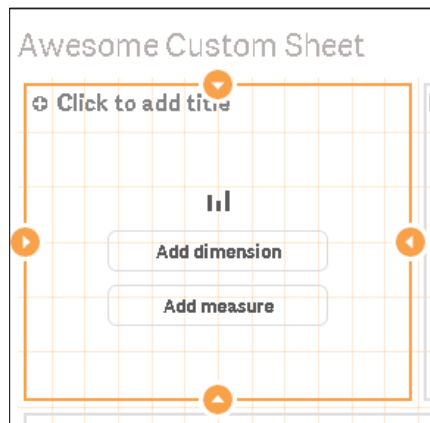
The **Library Panel** opens on the left of the page. It contains several categories of elements that you can insert into your Sheet. Drag them onto the canvas as desired, and repeat until the Sheet looks the way you want it.



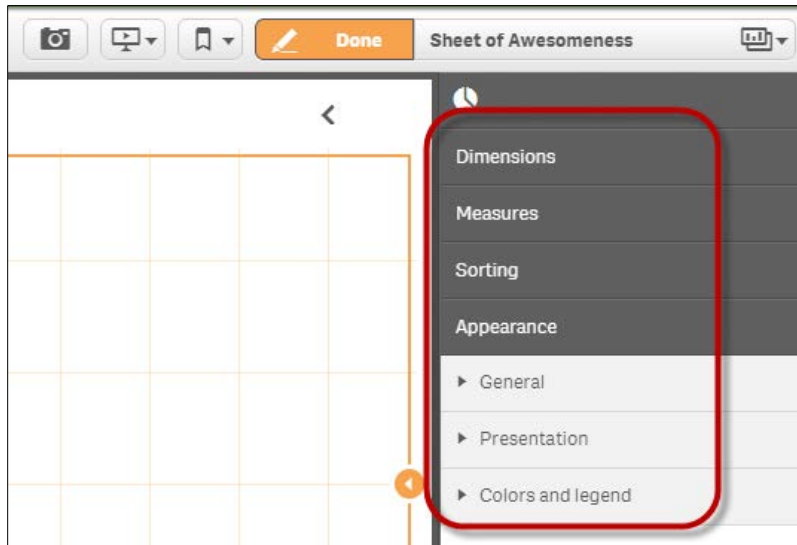
Start by choosing the Chart type (e.g., bar, pie, line) from the **Charts** category. Once you drag it to your Sheet, you can then add a title and drag-and-drop measures and dimensions into the indicated slots to define the parameters of your custom chart.



The element you are editing is outlined in orange, with handles that you can use to resize it. You can also drag and drop elements within the canvas if you wish to rearrange them.



When a chart is in edit mode, a new panel appears at right that offers options for editing that particular element. A number of choices are available to define how the data is presented.

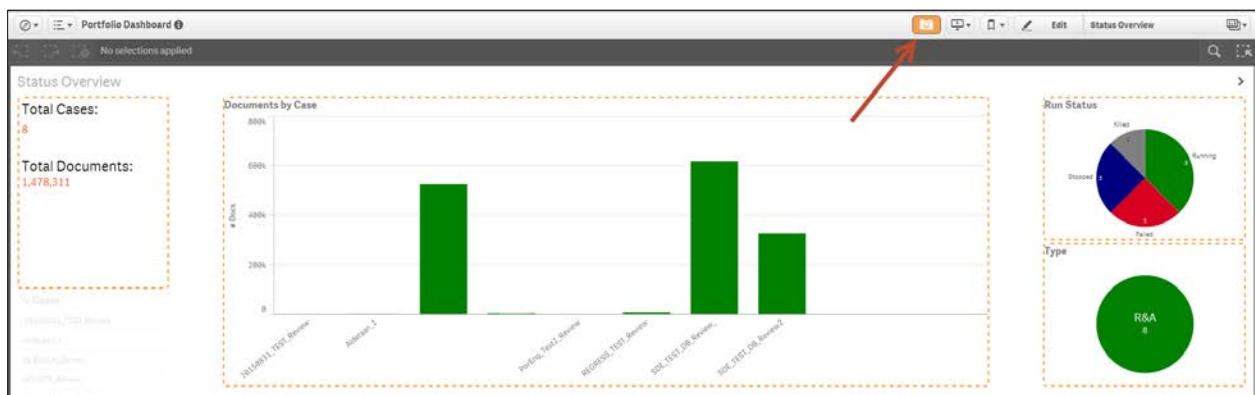


For any new element you add to your custom sheet, you can right-click on it to see options to **Delete**, **Copy** or **Cut** from your custom Sheet.

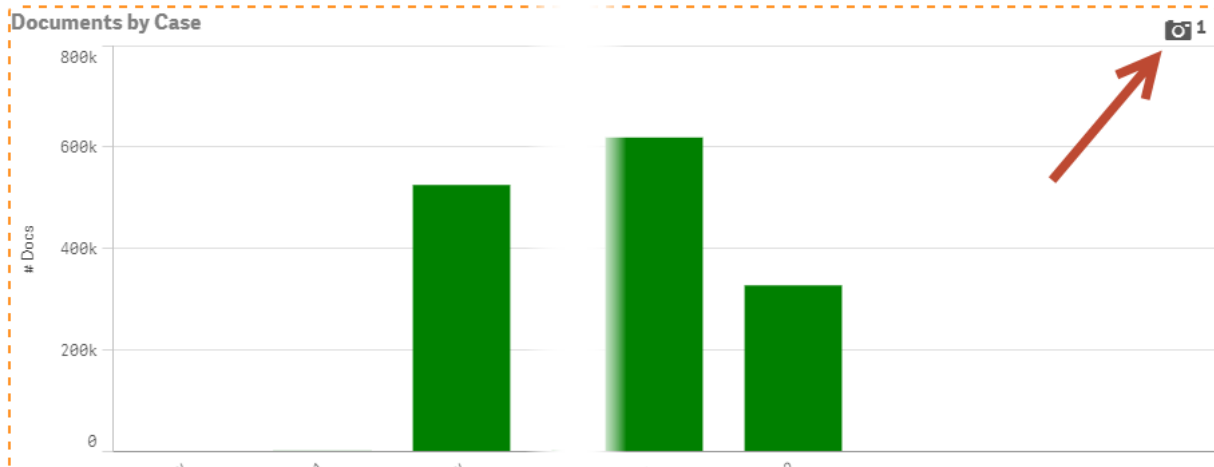
09. CREATE A STORY

Use Stories to collect snapshots of information that narrate a business case relevant to your project, much like you would build a presentation that illustrates a complex idea.

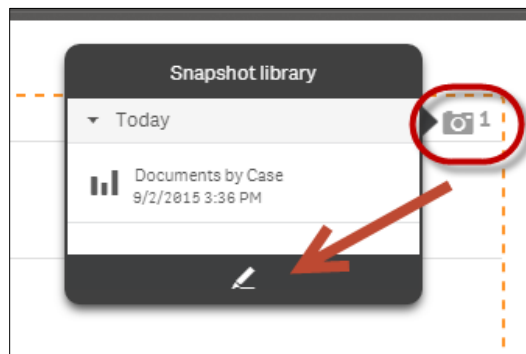
Begin building a Story by navigating to a target Sheet, and clicking the **Snapshot** button located in the main toolbar. A dotted line appears around each displayed element within the current Sheet.



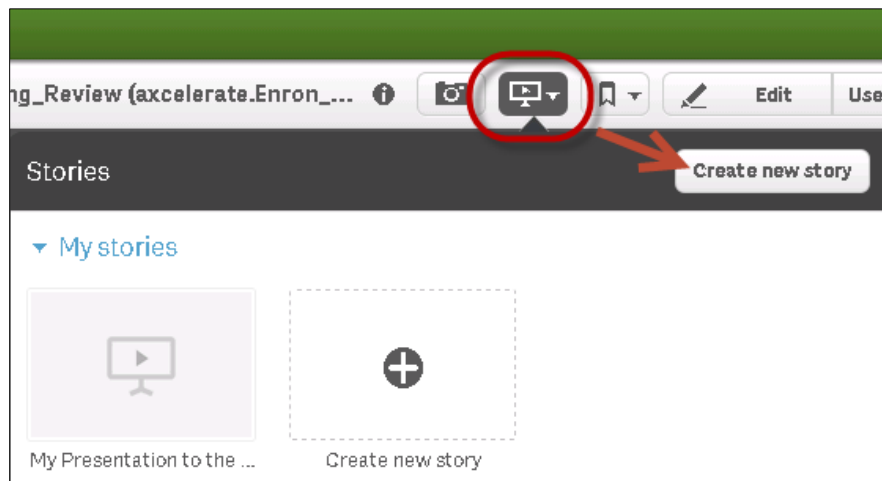
Once you see the dotted lines, click on any element you'd like to snapshot. A camera icon appears in the top right corner of each element once its picture has been saved.



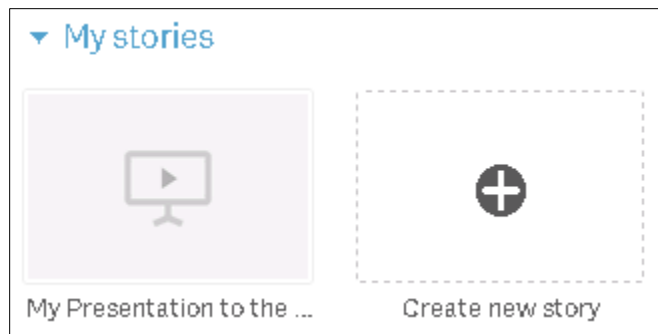
Snapshots of graphs are automatically named by their titles within the Sheet, and the timestamp of the capture is recorded. You may customize the names of your snapshots by clicking on the camera icon, then the edit icon.



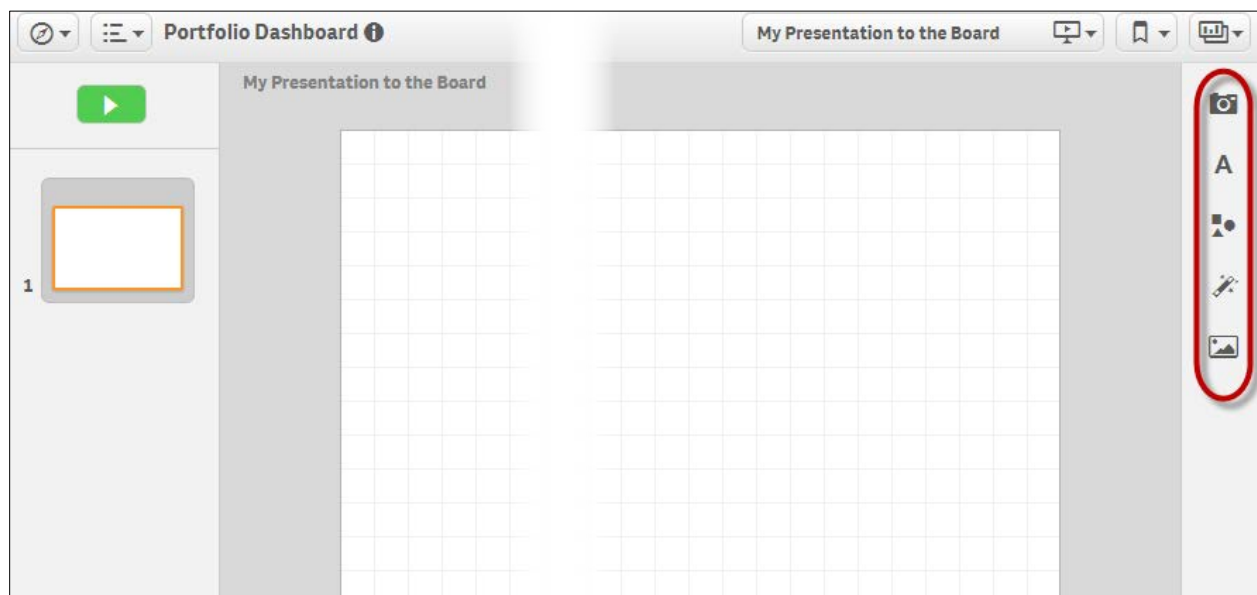
Now that you've collected your snapshots, they are saved to the **Snapshot Library**. Begin building your presentation by clicking the **Stories icon** > **Create New Story**.



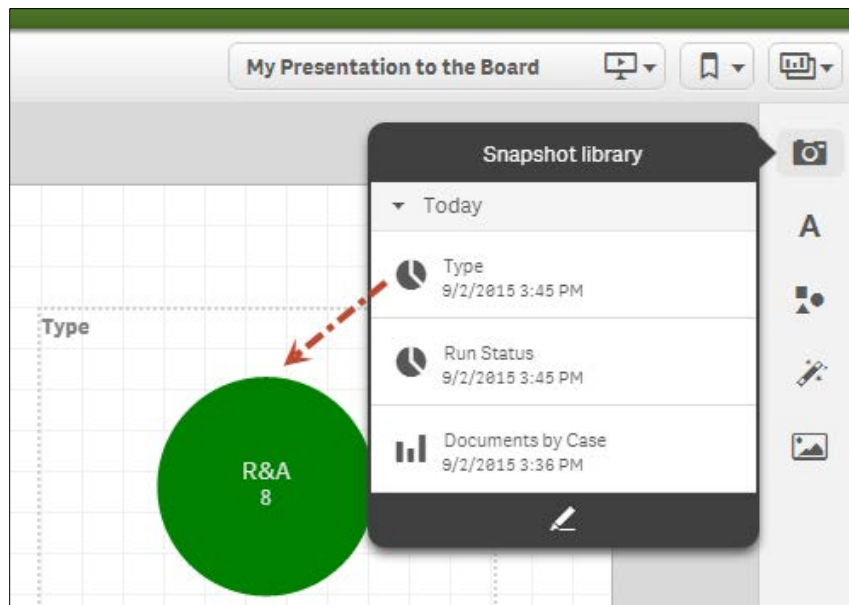
Give your Story a descriptive name and click to save it. Once you see the icon for your new Story, click it to begin adding content.



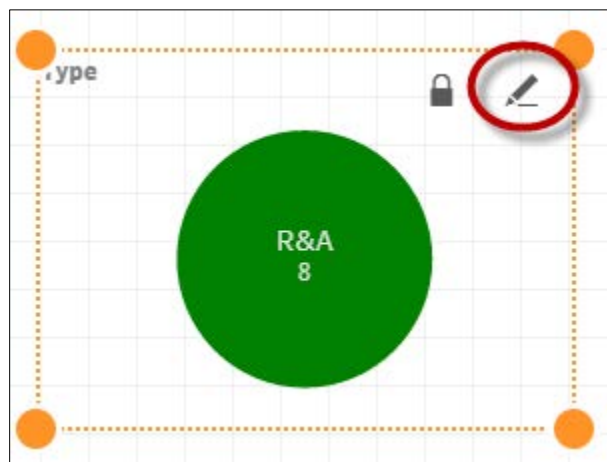
The blank canvas of your Story displays. Notice the icons to the right that open the **Snapshot Library**, and allow you to add text, shapes or images to your Story.



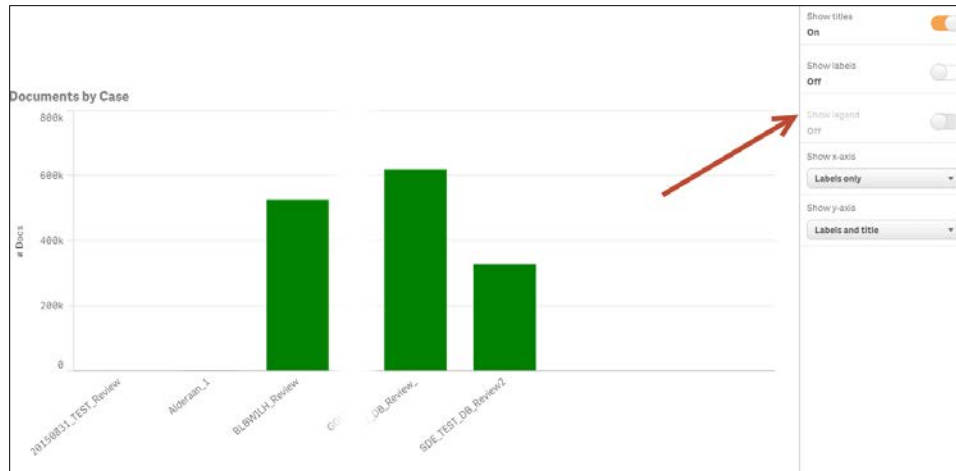
As with Sheet creation, use these tools to select elements and then drag them onto the canvas. The orange border appears when an element is in edit mode. Pull the handles to re-size. Drag and drop to re-arrange elements.



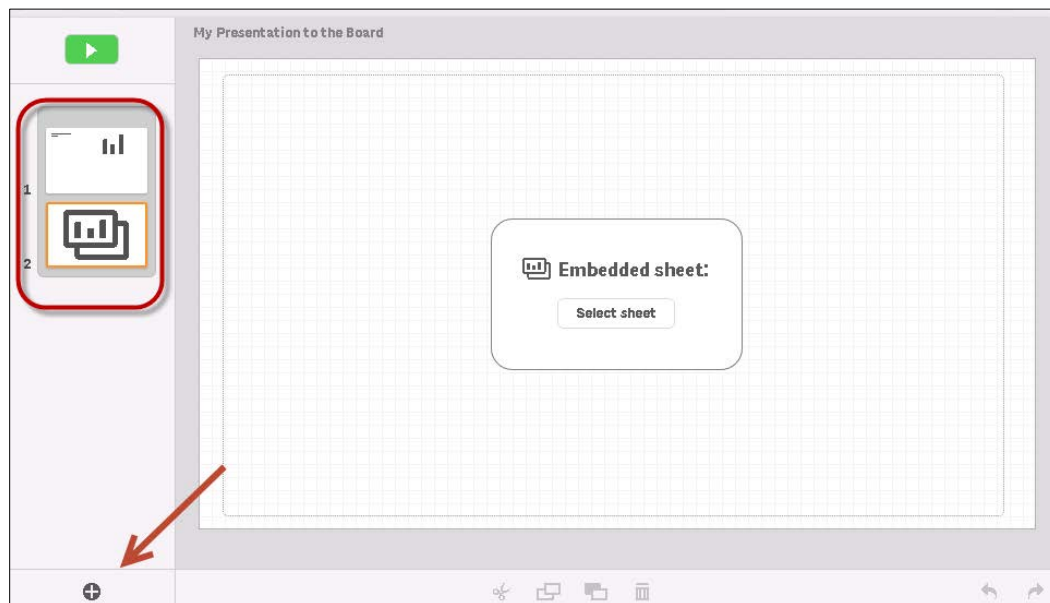
An edit icon is also available for each element you've placed in your Story.



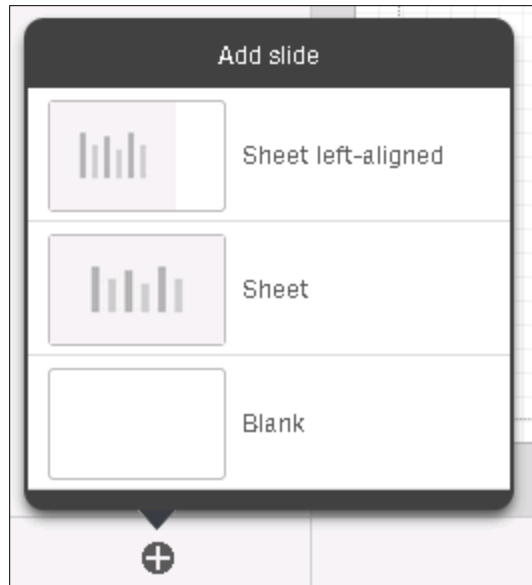
Click to see the edit options available. The options vary depending on the kind of element you have added, e.g., a snapshot or a title or block of text.



A thumbnail view of your Story displays at left, and a button at the bottom of the panel allows you to add blank new slides to the Story.



You can also choose to embed entire Sheets as one slide.

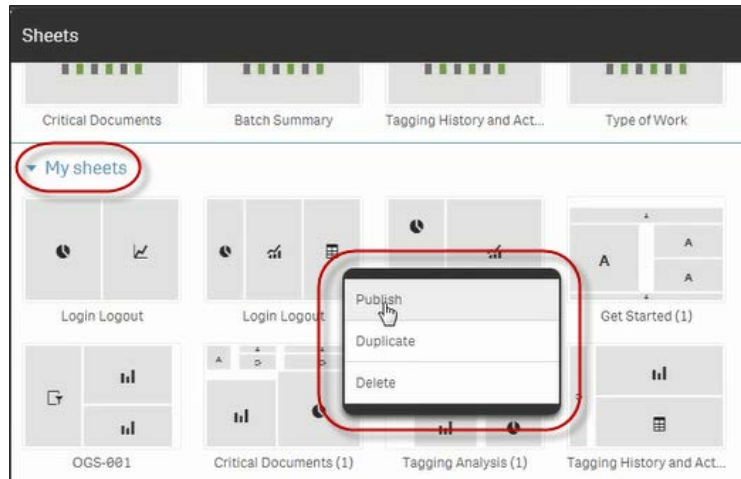


You can present your Story directly from the platform. Click the green button above the thumbnails to enter presentation mode.



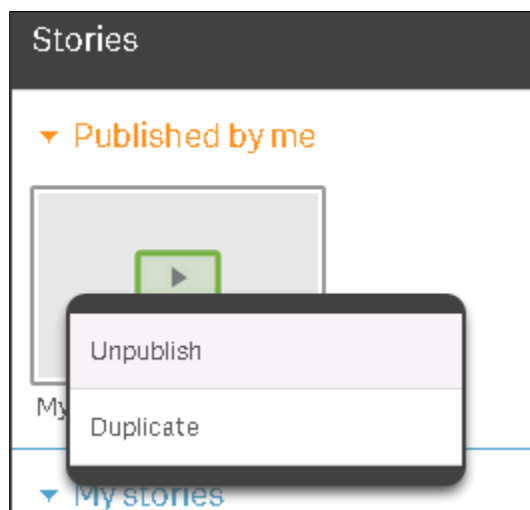
10. SHARING SHEETS AND STORIES

Any custom Sheets or Stories you create are stored in the **My Sheets/Stories** category of their respective main menus. Your custom Sheets and Stories are not shared with other project users until you right-click on them from this page, and select **Publish**.



Once you publish a Sheet or Story, it moves from the **My Sheets/Stories** category to a category called **Published by Me**. Other users will see it in a community category. Any other user can view your published work, but it cannot be edited once published.

If you want to un-share your Sheet, right-click on it and select **Un-Publish**. Only the owner of a Sheet can publish and un-publish a Sheet. Once you've unpublished a Sheet, you can edit it once again.



11. PINNING TOOL

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.

Settings

CaseMap

Time Zone [UTC-00:00]

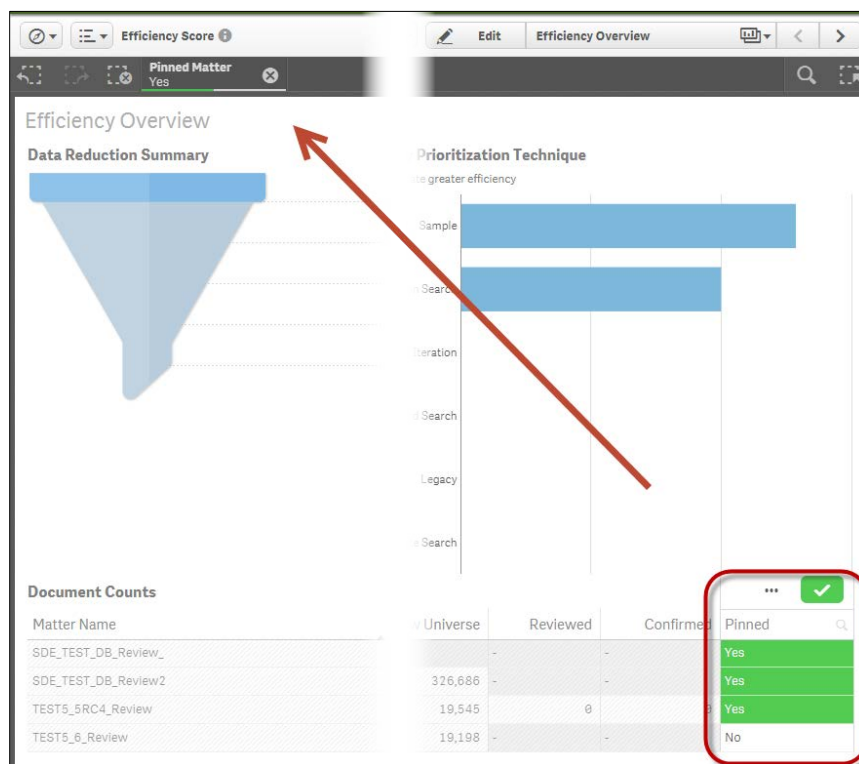
BI

Ignore Daylight Saving Time ☒

Pinned for Efficiency Dashboard ☒

Changes will take effect upon the next data load into Business Intelligence.

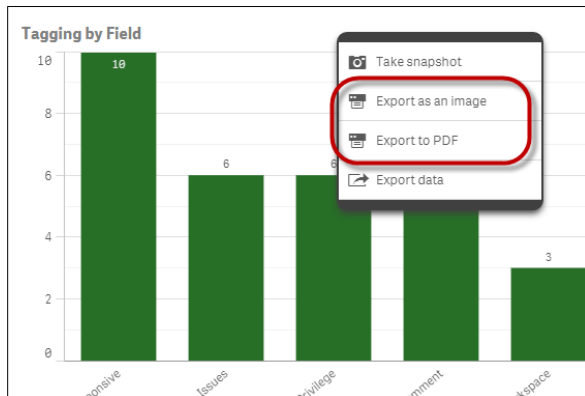
On the **Efficiency Score Dashboard** landing page, click the **Pinned** column in the **Document Counts** chart to apply a filter for the pinned projects only. The filter will stick throughout your session unless you actively remove it.



Information in the **Efficiency Score Dashboard** is updated on a weekly basis.

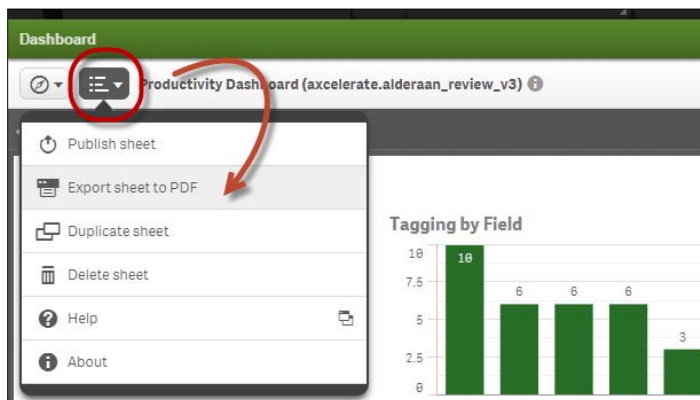
12. EXPORT

Right-click on an individual chart, or visualization, for options to export it to PDF or an image file. You can also export the underlying data in .csv format for simple charts.



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**.



13. HELP

For additional detail on topics such as designing your custom sheets and stories, access the [Qlik Sense documentation topics](#) via the Help link within the dashboard interface.

