RECOMMIND' is now OPENTEXT

Axcelerate 5: Coding Consistency Check Workflow

You can check for coding consistency among document families, duplicates, near duplicates or thread members in a few easy steps.

01. ISOLATE THE TARGET DATA SET

On the **Analysis** page, identify the **Smart Filter** that corresponds to the review field you would like to check for coding consistency, such as *Privilege* or *Responsive*.

Axcelerate 5 by Recommind		Enron_1	I_Demo	Ana	alysis
Search	= 1	Results			
Keyword Search	•		POS	REL 🔻	
Exact Match	× 2		1	100%	AXVE02:0034114
Search In					
Analytics	+		2	100%	AXVE01:0002657
Date	+				
Email			3	100%	AXVE01:0002653
Production / Conversion	×		6	100%	AXVE01:0002658
Work Product	×.				
Review Fields	•		7	100%	AXVE01:0002656
Issue					
Responsive Privilege			8	100%	AXVE01:0002663
Custom	F		٥	100%	AXVE01:0002650

Filter on the target value for your review field and click **Apply** to see only those documents coded with the target value.

Review Fields / Privilege	
Search for more values	
□ ▼	Count 4
Any Value No Value	(100) (25022)
Attorney Client	(100)
Work Product	(0)
Exclude 🕡	2 of 2
Attorney Client	
Run Report Cancel	Apply

02. USE ASSOCIATIONS TOOL TO EXPAND THE RESULTS LIST

Expand the stacked menu directly under the Search panel. Select the Associations tool.

Search	1	P New	-
expand	collapse		2.0
Keyw	ord Search	As	sociations
-	Exact Match	×	ρ

Specify the type of associated documents you want to check for conflicts in the **Expansions** area.

Notice the **Associations Smart Filter** criterion is now stacked on your original query in the **Current Criteria** panel. The total in the **Results list** has expanded to include the associated records, to the extent they exist.

Current Criteria		6	
Query Language			
Privilege			
	English Privilege Attorney Client	English Privilege Attorney Client DUPLICATES APPLIED	English Privilege Attorney Client DUPLICATES APPLIED

03. USE THE ORIGINAL FILTER TO LOOK FOR CONFLICTS

Without clearing the search, access the original **Smart Filter** for the target review field again. In the depicted example, this would be the *Privilege* filter.

Use the filter to isolate documents that are marked with some value other than your original selection. You would also want to look at documents with no value for the target field – these are your conflicts. For example, if you are looking at the *Privilege* field to find conflicts with documents marked "Attorney Client," then any documents that show tagged as "Work Product" and "No Value" might be conflicts.

Review Fields / Privilege	e
v	Count ∡
Any Value	(100)
No Value	(210)
Attorney Client	(100)
Work Product	(3)

If such searches return no results, then there are no conflicts to examine.

If you find conflicts, it is helpful to batch just those documents, or to place them in a workspace for conflicts review.