

## Getting Started

### Logging In

To log-in, navigate to Lexbe.com and click on *Platform Login* on the upper right.

If you can't remember your password click on *Forgot Password?* to reset.

## Help and Technical Support

Lexbe User Guide (PDF Printable):

<https://www.lexbe.com/support/documentation/>

Online Help:

<http://help.ediscoveryplatform.com/help-pages-contents>

Online Technical Notes:

<http://help.ediscoveryplatform.com/technical-notes-available>

Support Ticket System:

<https://www.lexbe.com/support/submit-a-support-ticket/>

Professional Services:

Call 800-401-4710 or email

[ProfessionalServices@Lexbe.com](mailto:ProfessionalServices@Lexbe.com).

Address:

Lexbe, Inc. 8303 North MoPac Expressway B-225  
Austin, TX 78759

## Administration

### Adding Users

From the Home menu, go to the Account section and select *Manage Users* from the drop-down menu. Click *Create New User in Account*.

### Types of Users & Rights

- Account Administrators – full access to all functions
- Power Users – full access to all but admin functions
- Standard Plus Add & Delete – can code, upload and delete documents
- Standard User – can code, but not upload or delete
- Review Users – access limited to coding
- Read-Only Users – same access as a Standard User, but read-only and cannot upload or delete
- Limited Users – access to assigned documents only, limited functionality

### Deleting Users

Account Admins can permanently remove other users from an account or disable user access to specific cases. Check *Show Cases* under the *Show Columns* section on left. Select the user(s) and then either remove cases using the *Remove Case* drop-down menu or delete the user(s) by clicking the *Remove User* button.

## Lexbe eDiscovery Platform (LEP) Navigation



## Case Management

### Create a New Case

Account Administrators can create new cases. Go to *Account>Manage Cases* and select the applicable account. Expand the section entitled *Create New Case in Account* on the left, type in the name and click *Create New Case*. Then add user access, including yourself.

### Deleting Cases

Account Administrators can delete cases that are no longer needed. To delete a case, go to *Account>Manage Cases*, and select the account and case to delete. Expand the *Delete Cases* section, and click *Delete Selected Cases*. Cases cannot be undeleted by Account Administrators – contact Professional Services if a case is accidentally deleted and needs to be recovered.

## Document (ESI) Upload/Ingestion

### DIY Adding Documents to a Case

Administrative and Power Users can self-upload individual or batches of documents to a case from *Case>Add Case Documents*. To initiate, expand the section for *File Upload* on the left and click *Upload*.

Before uploading, the following fields should be set, as applicable:

- Batch Title – unique name for upload
- Batch Comments – description, (i.e. where collected, etc.)
- Doc Source – enables filtering by ESI source
- Case Custodian – default is unassigned
- Time Zone Offset – default is Universal Time (GMT)

To upload productions with corresponding load files (e.g., Concordance DAT/OPT, or Summation DII), see our Help documentation or contact Professional Services. Uploaded files will start processing automatically. Click on the Processing hyperlink at the top right of the screen to receive automatic email notification when processing is complete.

### Courtesy Uploads/Ingestions

Lexbe offers free electronically stored information (ESI) uploading and ingestion for clients with LEP Subscription+ Plans. This includes native ESI of Lexbe-supported formats, and industry-standard productions including load files (DAT and DII). You may provide ESI to Lexbe staff for secure upload by FTP, AWS, Dropbox, or by shipping media on flash or hard disc drives.

## Automatic Processing and Normalized PDF Creation

Following upload, LEP automatically processes the ESI, including container expansion, metadata extraction, conversion of supported file types to normalized PDFs when possible, OCR of images, native and OCR'd text extraction, and indexing for search.

### Placeholder Files and QC Reports

Upon completion of processing, QC of placeholder files (unconverted files from native uploads or produced images) should be done to determine if manual conversion is needed. A QC report of placeholder files may be run from the *Analysis>Case Assessment* menu. Placeholders can also be filtered from the Browse page. Placeholders are generated for the following reasons:

- Failed to Convert – supported file type that did not convert, such as corrupted, partially corrupted, password protected, etc.
- Unsupported – non-supported or unsupported file types

Native versions of Placeholder files are available for production or additional manual conversion of Placeholder files may be attempted by clients or by our Professional Services department upon request.

### Excel Integration for Metadata and Coding

Metadata from uploaded native files and load files, as well as all coding, can be downloaded to Excel, modified in Excel, and then updated to the LEP case database. This is useful for custom updating, complex QC, managed review, and custom Privilege Log creation.

### Email Threading and NearDupe Groupings

Email Threading can be run based on email metadata. NearDupe Groupings identify documents with 50% or more overlap in textual content. Both can be viewed from the Browse and Document Viewer pages.

## Document Coding and Searching

### Browsing, Sorting & Filtering Documents

The Browse page shows all documents in the current case in tabular format sorted by Master Date, Title, or other fields. From Browse, you can open documents in the Document Viewer, and apply filters from the Browse and Search pages. You can take the existing coding sections (e.g., 'Title,' 'Bates,' 'Doc Source,' 'Date Uploaded,' etc.), and narrow down the results based on criteria that do/do not match. To do this, select *Filters>Select Filters* from the left margin.

## Built-In and Custom Document Fields

LEP includes many standard built-in coding fields, including "Responsive", "Privileged", "Atty Work-Product", and "Confidential". Also, an unlimited number of custom coding fields specific to a case can be created. Saved filters can be created using one or more built-in and/or custom fields.

## Searching Documents

Select the Search menu at the top, enter a search query in the search dialog box, and click *Search* or hit Enter on the keyboard. Additional search options can be selected from the left side menu bar by expanding the *Options* section.

The Lexbe UberIndex combines comprehensive native file text extraction, OCR of images and imaged files, metadata extraction, foreign language translations, and dynamic real-time updating into a single concatenated search index to provide fast and comprehensive eDiscovery searching. Search results include document tracked changes and revisions, presentation notes, hidden text, hidden cells in spreadsheets, and OCR'd text.

## Search Options and Types

LEP includes the following search options:

- All of the words – instances where all words in the query appear in the document
- Any of the words – results include documents that contain any of the multiple key words specified
- The exact phrase – results will only include documents with entire search query as entered
- Boolean – users can enter a Boolean expression using 'AND', 'OR', and/or 'NOT' logic
- Fuzzy – returns search results which account for misspellings or errors in search inquiry or docs
- Stemming – extends a search to cover word variations (i.e. a search with 'apply' would also return results for 'applying', 'applies')
- Phonic – will look for words that sound alike or are phonetically similar

## Saved and Shared Searches

Recent, saved, and shared searches are available under the *Search Quick Links* section on the left. This displays the five most recent searches. Click the *Edit* hyperlink for a full list of searches. To share searches with other users, click on the *Edit* link, and check the shared icon checkbox. To save and Pin, click on the *Edit* hyperlink, select a recent search by title, and use the checkbox under the Pin symbol to Pin searches.

## Multi-Doc Coding/Tagging

The Multi-Doc Edit function allows users to select many documents (by selection, search or filter) and then code all with one action. From the *Browse* or *Search* pages, choose the documents that need to be coded and then select the documents by checking the *'Select All'* at the top of the page. Use the Multi-Doc Edit drop-down box on left side menu bar to select the tag to be applied. Alternatively, code documents directly from the Document Viewer.

## Integrated Document Viewer

The screenshot shows the Lexbe Integrated Document Viewer interface. Callouts point to various features:

- Opens Document in Native format:** Points to the top navigation bar.
- Highlights key words from search results:** Points to the HITS tab.
- Produced Document With Bates Stamp:** Points to the document content area.
- Full Document:** Points to the document content area.
- Displays extracted text from native version of document:** Points to the HITS tab.
- Displays PDF version one page at a time:** Points to the PDF tab.
- Displays Full PDF:** Points to the PDF tab.
- Displays OCR'd Text:** Points to the TEXT tab.
- View metadata and apply coding including built in and custom fields:** Points to the right-hand sidebar.
- Create and apply Redactions and Annotations:** Points to the right-hand sidebar.
- Create, review and edit Doc notes:** Points to the right-hand sidebar.
- Related email family, email threading, exact & near dups:** Points to the right-hand sidebar.
- Create, review, and edit facts:** Points to the right-hand sidebar.
- Displays Translated Version of Document:** Points to the TRANSLATED tab.
- Displays Redacted version of Document:** Points to the REDACTED tab.
- Displays Annotated version of Document:** Points to the ANNOTATED tab.

## Document Review

### Using the Document Viewer

Open the LEP integrated Document Viewer by clicking on a document title from the Browse, Search Notes or Facts & Issues pages. The Doc Viewer includes up to ten different document views of the same underlying document record. You can enter and edit document coding and data, apply review tagging, and add/edit notes and facts. If the Doc Viewer is opened from Browse, then Case Keywords will be highlighted in the HTML and TEXT tabs. If the Doc Viewer is opened from Search page, then search terms will be highlighted on the HITS tab.

### Creating and Using Review Sets

Once users have collected all relevant documents and uploaded to LEP you can bundle documents into smaller groups or batches to manage a review workflow. To create a review set of documents, navigate to the Account Tab, click *Manage Review Sets*, select *Create New Set*, and update title, as necessary. Once a set is created, add documents from the *Browse* or *Search* page. You must click *Start Review* from the Manage Review Sets page before a reviewer can check out a batch. To check out a batch, go to *Discovery>Review*, select the review set and click *Get Batch*.

## Productions

### Creating Productions

Go to *Discovery>Production Job*, expand the section *Production Job*, click *Start New Job*, and enter the title. This action creates a production container. Add documents by searching or filtering to identify documents from the Search or Browse pages. Select the

documents to add, expand the section for *Productions*, and add the specified documents to the production job. Return to *Discovery>Production Job*, select the production job and enter the production job specifications by clicking *Edit* at the bottom of the table. Production job requirements include: Title, Comments (optional), Bates Prefix, Bates Base (starting Bates number), Number of Digits (6-10), Custom Designation (e.g., For Attorneys' Eyes Only), Production Type (Standard PDF or Standard plus TIFF), Include Native Emails (checkbox), and Sort By (Doc Title, Master Date, Source File Path, Custodian, or Custom Doc Fields). Click *Update* once all production specifications are set.

### Validating and Running Productions

Validation is required prior to running a production to resolve any inconsistency in responsiveness and privilege coding and review time should be allotted. To validate, expand the *Production* section on the left, select *Validate Production*, and complete the validation steps. Once Validated, click *Run Production* from the *Production* section. Completion time depends on the number of documents, pages and types. A production cannot be run while other processing is ongoing in the same case.

### Download and Securely Share Productions

Go to *Discovery>Production Job* and select the Production Job from the drop-down *Production Job* menu on the left. Under the section for *Production*, click *Download Production*. The download will automatically start, or you may be prompted to select a location on a local computer. For large Productions, the download will be done in parts, and can be combined to get a final, full production download. To securely share a Production, select a completed Production, click *Edit*, check the box for *Allow users without access to eDiscovery Platform to download this Production*, enter a password (if applicable), click *Update*, and then click *Copy Link*.

## Creating Redactions

### Redacting for PII, Confidentiality or Privilege

Select the document title to open in the Doc Viewer. Go to the *DOC* tab on the right side and expand the section for *Redaction Editor*. Click *Open Redaction Editor*, save redactions and click *Apply* when done.

## Creating Case Notes

### Keep Track and Share Notes

Go to *Analysis>Case Notes* to organize thoughts, comments and tasks related to a document. Use the Facts and Issues module instead to create case facts and issues and link to applicable documents.

## Downloading & Exporting

### Save Individual Documents

Individual documents can be downloaded, printed or saved by opening in the Doc Viewer, selecting the PDF tab, and selecting *Download* within the PDF viewer.

### Save Multiple Documents to a Briefcase

Select documents from Search or Browse, expand the section for *Export* on the left, click *Export to Briefcase*, and complete Briefcase options. To download once processing completes, go to *Case>Download Briefcase*, select the briefcase name, and save locally.

### Merge and Print Multiple PDFs

Merge multiple documents into one PDF for fast and easy printing in Master Date order. After a Briefcase is created, go to *Case>Download Briefcase* and check the box next to the briefcase. Expand the left-side menu for *PDF Merge* and click *Create Merged PDF* then download and print.

### Secure Download Links

To securely share a Briefcase, go to *Case>Download Briefcase*, select a Briefcase, click *Edit*, check the box for *Allow users without access to eDiscovery Platform to download this Briefcase*, click *Update*, and then click the share checkbox. Briefcases should not be shared with opposing parties or counsel.

### Case Archives

To create a case archive for download, navigate to *Account>Archive Job*, click *Start New Job*, name the job, and click *Create*. Archives can be Standard (native and PDF) or Standard Plus TIFF. Select some or all case documents to archive from Browse or Search, expand *Archive Jobs* on the left-side menu, and click *Add Docs to Archive Job*. Then return to *Account>Archive Job*, expand the Archive menu on the left, and click *Run Archive Job*. Once processing completes, expand the Archive menu on left and click *Download Archive Job* to save the archive locally.

## Privilege Logs

A standard privilege log is automatically created for all productions from extracted metadata and coded data. A custom privilege log can include any optional or custom fields. Go to *Discovery>Privilege Log*, select the production and *Export>Export to Excel*.

## Deposition Prep

### Annotate Docs for Witness Examination

Open a document in the Doc Viewer, select the *DOC* tab on the right, click the Open Annotation Editor button, annotate, and then click *Apply* when done. An Annotated tab will display in the Doc Viewer.

### Transcript Highlighting

Open a transcript in the Doc Viewer, go to the *DOC* tab on the right, expand the section for *Annotation Editor*, and click *Open Annotation Editor*. Highlight text as needed. Continue and save highlights throughout the document, and click *Apply* when done. If desired, copy highlighted text to create Facts for timelining.

## Witnesses, Facts & Issues

### Identifying Case Custodians

Set up litigants, deponents, witnesses and other person or ESI sources from *Analysis>Custodians*.

### Creating Facts and Timelines

Create facts, issues, and dynamic timelines by going to *Analysis>Facts & Issues*. Create a new issue with the *Create New Issue* link.

## Other Lexbe Services

Assisted Review+ uses a transparent predictive coding (aka 'Technology Assisted Review' or TAR) algorithm to support fast, automated, and defensible review of large ESI collections. NearDupe Grouping+ groups similar documents based on text similarity (>50%) to speed document review and ensure consistency in responsive and privilege coding.

## Lexbe Professional Services

### On-Call Expertise When You Need It

Sometimes you need more expertise or faster response than you can do yourself or we can provide through standard Customer Support. In these cases our team of Professional Services experts are available to assist with case, job, or project specific service needs. All team members have extensive law firm experience and are ACEDS-certified (Association of Certified eDiscovery Specialists). Call Professional Services at 800-401-4710 or email [ProfessionalServices@Lexbe.com](mailto:ProfessionalServices@Lexbe.com).