BUILD YOUR BEST CASE

Quick Reference Card

Getting Started

Logging In

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

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

Help and Technical Support

Lexbe User Guide (PDF Printable):

www.lexbe.com/support/documentation/

Online Help and Technical Notes:

https://help.ediscoveryplatform.com/home

Support Ticket System:

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

Software Update Details:

https://help.ediscoveryplatform.com/whats-new/release-notes

Professional Services:

Call 800-401-4710 or email 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 the **+** icon to create a new user.

Types of Users & Permissions

- Account Administrators – access to all functions
- Power Users – 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 is limited to coding
- Read-Only Users – same 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 remove users from an account or disable user access to specific cases. To update case access for a user, go to *Account>Manage Cases*, select the account, click the desired case, and select or deselect the user(s). To delete a user from an account, go to *Account>Manage Users*, select the account, then click the **X** next to the desired username.

Lexbe eDiscovery Platform (LEP) Navigation

Home Case Analysis Search Browse Discovery Management

- Case: Contacts, Add Case Documents, Download Briefcase
- Analysis: Case Assessment, Case Dashboard, Custodians, Facts & Issues, Case Notes, Search Term Report, Auto-Redaction
- Discovery: Review Sets, Production Job
- Management: Manage Custom Doc Fields, Split PDFs, User Profile, Manage Password

Case Management

Creating Cases

Account Administrators can create new cases. Go to *Account>Manage Cases* and select the applicable account. Click the **+** icon in the upper right corner, type in the case name, and click *Add Case*. Once created, add any users requiring access to the case, 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 appropriate account. Hover over the case to be deleted and click the **X** to the right of the highlighted case. Deleted cases cannot be restored 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

Administrators and Power Users can self-upload individual documents or batches of documents to a case from the *Case>Add Case Documents* page. To initiate an upload, click *+ New Upload* in the upper right corner. Before uploading, the following fields should be filled out as desired::

- 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 icon at the top right of the screen to receive an automatic email notification when processing is complete.

Courtesy Uploads/Ingestions

Lexbe offers free ingestion of electronically stored information (ESI) 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 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 OCRed 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 files, as well as all coding, can be downloaded to Excel, modified in Excel, and then updated in the LEP case database. This is useful for large custom updates, complex QC, managed review, and custom Privilege Log creation.

Email Threading and NearDup Groupings

Email Threading is run based on email metadata and threads can be displayed in an hierarchical view. From the visualizer, emails can be selected for coding, viewing and comparing. NearDup Groupings identify documents with 50% or more overlap in textual content.

Document Coding and Searching

Browsing, Sorting & Filtering Documents

The Browse page displays all documents in the current case. By default, documents are sorted by Title, but users can customize the sort using any available fields. From the Browse and Search pages, users can apply filters and open documents in the Document Viewer. Users can build simple or complex filters using any of the available built-in or custom fields. To do this, choose *Filter>Select Filter* from the left margin. The 'Simple' option provides basic filtering capabilities, whereas the 'Advanced' option allows users to build complex filters.

Built-In and Custom Document Fields

LEP includes various built-in coding fields such as Responsive, Privileged, Attorney Work-Product, Confidential, and Custom Designation. Additionally, an unlimited number of custom coding fields can be created in a case.

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. Users may also utilize the Search Term Report feature which is found under *Analysis>Search Term Report.* This feature allows users to run multiple searches simultaneously and generate a hit report.

The Lexbe UberIndex combines comprehensive native file text extraction, OCR of all files, metadata extraction, foreign language translations, and dynamic real-time updating into a single search index providing fast and comprehensive eDiscovery searching. Search results are inclusive of tracked changes and revisions, presentation notes, hidden text, hidden cells in spreadsheets, and OCRed text.

Search Types

LEP supports the following types of searches:

Boolean
Searches utilize the connectors AND, OR, NOT or AND NOT, as well as parenthesis if needed.

Wildcards
Use the **?** to account for a single unknown character. Use the ***** to account for multiple unknown characters.

Fuzzy
Use the **~** to account for potential typographical or OCR errors. Fuzzy searching finds all terms with a maximum of one change, where a change is the insertion, deletion or substitution of a single character, or transposition of two adjacent characters.

Proximity
Specify the maximum distance between words and/or phrases.

Metadata
Search certain metadata fields directly from the Search page.

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 to rename quick links as desired. To share searches with other users, or pin them for private use, click *Edit*, then click the vertical ellipses, select the desired option and click *Save*.

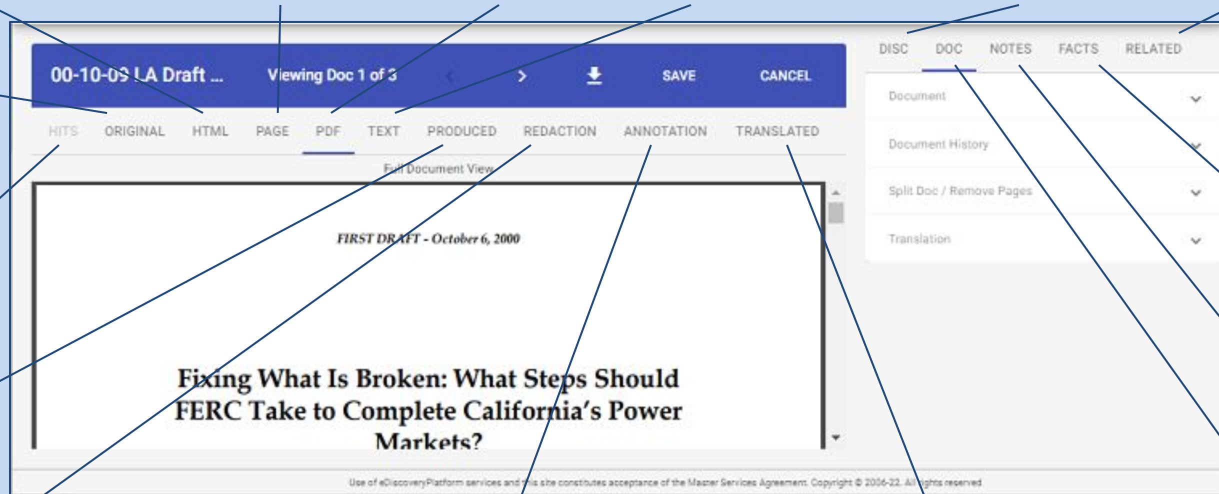
Multi-Doc Coding/Tagging

The Multi-Doc Edit function allows users to apply coding to multiple documents, with or without family members, all in one action. From the *Browse* or *Search* pages, select the documents to be coded. Selections can be made by checking document checkboxes individually, or by using the *Select* drop-down at the top of the document table. Expand the Multi-Doc Edit menu on the left and select the field to be updated. Click *Update* to save coding, or *Cancel* to exit without saving. Alternatively, users can code documents directly from the Doc Viewer.

Quick Reference Card

lexbe℠ BUILD YOUR BEST CASE

Integrated Document Viewer



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 document record. You can enter/edit document coding, 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 the Search page, then search terms will be highlighted on the *HITS* tab. LEP supports the Google Chrome native viewer addon that displays MS Office documents directly in the Original tab while maintaining native read-only program functionality.

Creating and Using Review Sets

Once users have uploaded all relevant documents to LEP you can bundle documents into smaller groups or batches and implement a review workflow. To create a review set of documents, navigate to *Discovery>Review Sets*, and click *+Add Review Set.* Once created, add documents from the *Browse* and/or *Search* pages. An Account Administrator must click *Begin Review* to make the review set available to reviewers. To check out a batch from the *Review Sets* page, click *Start*. Users may exit their batch at anytime.

Productions

Creating Productions

Go to *Discovery>Production Job,* click the **+** icon to create a new production. If there are existing productions in the case, then users have the option to continue the Bates numbering from a previous production job.

Production job details and options can be edited up until the production is run. Details and options 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, and Sort By (Doc Title, Master Date, Source File Path, Custodian, or Custom Doc Fields). Changes are saved automatically. Identify documents to produce by searching and/or filtering on the Browse or Search pages. Select the documents to add, expand the menu for *Productions*, and add the specified documents to the production job.

Validating and Running Productions

Validation is required prior to running a production so users can resolve or accept any inconsistencies in responsiveness and/or privilege coding. To validate, click on the applicable production job card and click *Validate*. Validation will run automatically and alert users to any inconsistencies. Once Validation is complete, click *Finish* in the lower right corner, and then click *Run* in the production job card to initiate processing. Completion time depends on the number of documents, pages, and file types. A production cannot process while there is ongoing processing in the same case.

Download and Securely Share Productions

Go to *Discovery>Production Job*, select from the production job cards on the left, and click *Download*. 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 that can be combined to get a final, full production download. To securely share a Production, select the desired Production, check the box for *Shared. Allow users without account access to download this Production,* enter a password and, if desired, an expiration date, and then click the icon to copy the share link.

Privilege Logs

A standard privilege log is generated for all productions from extracted metadata and coding. A custom privilege log can also be created. To export, go to *Discovery>Production Job,* select the desired production, click the vertical ellipses in the upper right, and click *Export Privilege Log.*

Redactions, Annotations, Highlights

Redacting Documents

Click the title of the document to open in the Doc Viewer. Go to the *Redaction* tab and click *Generate Images*. Make the desired redactions and click *Save.* To upload a manual redaction, view, or delete the redacted PDF, expand the Redaction menu and select the desired action. Auto-Redaction is also available to users by going to the *Analysis>Auto Redaction* page.This feature allows users to redact multiple documents simultaneously.

Annotating and Highlighting Documents

To highlight text, open a document in the Doc Viewer, select the *Annotation* tab, and click *Generate Images*. Select the text to highlight and click *Save.*

To make an annotation, follow the above directions, but before saving, type the annotation text into the applicable entry from the list on the right. This action turns the highlighted area into an annotation. To upload a manually annotated document, view, or delete the annotated PDF, expand the *Annotation* menu and select the desired action.

Create and Share Case Notes

Notes can be created within the Doc Viewer. Go to the *Analysis>Case Notes* page to view all notes in a case. Case notes can also be edited, deleted, and/or exported from this page as well.

Download and Export Docs

Saving 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.

Export and Merge Documents by Briefcase

Select documents from Search or Browse, expand the *Export* menu on the left, click *Export to Briefcase,* and complete Briefcase options. To include a merged version in the briefcase (i.e. a single PDF of the selected documents), select the *Merge PDFs* option when exporting. To download once processing completes, go to *Case>Download Briefcase*, then click *Download* for the desired briefcase, and save locally.

Secure Download Links

To securely share a Briefcase, go to *Case>Download Briefcase,* click on the desired briefcase, check the box for *Allow users without access to eDiscovery Platform to download this Briefcase,* and click *Save.* To copy the share link, click *Download*, then click *Copy share link.* Briefcases should not be shared with opposing parties or counsel.

Case Archives

Case archives are created and processed, per request, by the Professional Services team. They can be generated for an entire case or for a subset of specified documents. Case archives can be exported in Standard (native and PDF) or Standard Plus TIFF format.

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 by click the white **+** icon in the upper left corner. To add a new fact, click the blue **+** icon in the upper right corner. To view facts as a timeline, click on the white graph icon in the upper right corner. Only facts associated with a date are displayed in the timeline.

Lexbe AI Insights

Lexbe offers several integrated artificial intelligence services. Additional charges may be incurred depending on account type.

<u>Cognitive Image Recognition+</u>
Extracts pertinent keywords based on objects in an image

<u>Audio Transcription+</u>
Machine transcription of standard audio files

<u>Email Sentiment Analysis+</u>
Codes emails as positive, neutral, or negative in overall sentiment

<u>Entity Recognition+</u>.
Extracts useful data and objects from unstructured text

<u>Auto-Language Detection+</u>
Detects foreign language

<u>Auto-Language Translation+</u>
Context-based machine translation

<u>Assisted Review+</u>
Predictive coding

Lexbe Professional Services

On-Call Expertise When You Need It

When you need additional expertise our team of Professional Services experts are available to assist with your specific service needs, including Digital Forensics, eDiscovery Project Management, and evidence collection. All team members have extensive law firm experience and have forensics and/or are ACEDS-certified (Association of Certified eDiscovery Specialists).

Call Professional Services at 800-401-4710 or email ProfessionalServices@Lexbe.com.