

CONFIDENTIAL

QUEST USER GUIDE

Abstract

This user guide provides a comprehensive walkthrough of the process involved in creating and managing matters within QUEST application.

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Purpose:

The purpose of this user guide is to provide clear instructions and guidance to users on how to navigate and utilize the features of QUEST application.

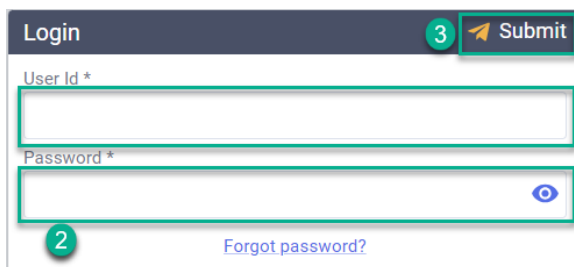
Scope:

This user guide covers the process of creating and managing matters within QUEST application. It provides step-by-step instructions for logging in to the platform, accessing the Quest UI, and performing actions such as creating new matters,

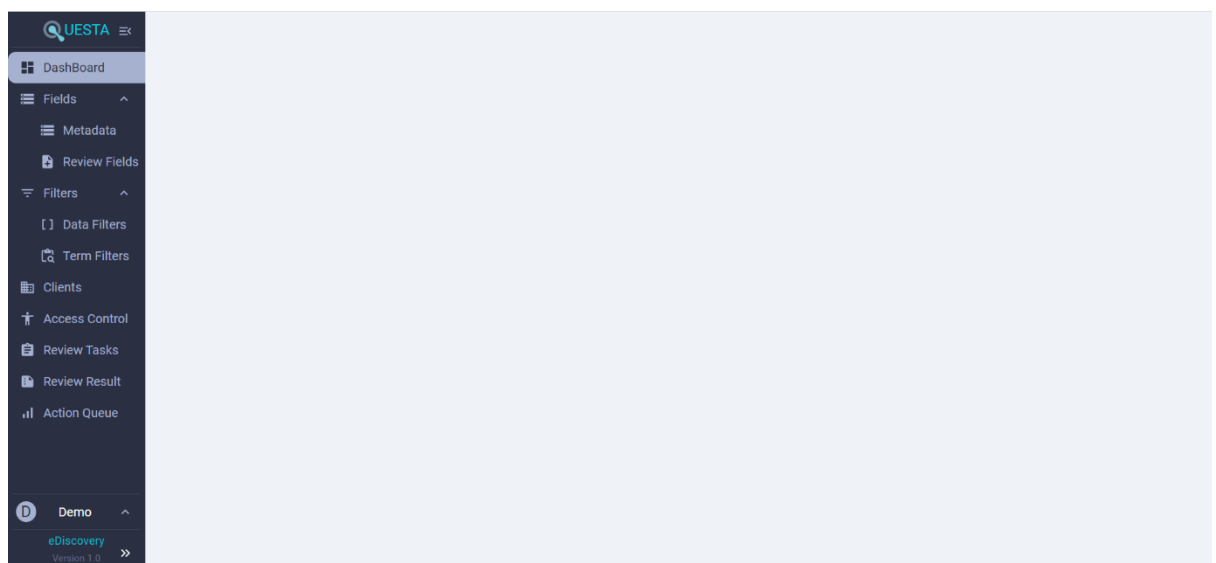
Creating a Matter in QUEST Application

Logging in to QUEST Application

1. Open your web browser and navigate to exodusdata.online. This will direct you to the login page of ExodusData.
2. Enter your User ID and Password in their respective fields.
3. Click on the Submit button to proceed.

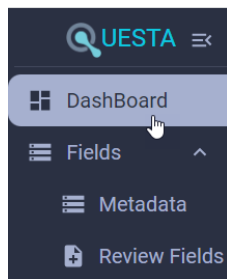


After logging in, you will be directed to the QUEST UI.



Creating a New Matter

1. On the left pane of the QUEST UI, locate and click on the Dashboard option.



This will display various reports related to matters.



2. To add a new matter, click on the "Add Record" button.

Matters						Search	Refresh	Download	Add
Number	Name	Client	Status	Last Updated By	Last Updated At				
Matter 001	Gateway Royalty, LLC, et al. v. EAP Ohio, LLC, et al.,	Law Office of Robert c Sanders	Open	KJ Org Admin	04-May-2023 01:48 AM				

This will open a form with multiple tabs for entering the matter details.

The screenshot shows the QUESA application interface with the 'Matter Config' tab selected. The left sidebar contains navigation options: Dashboard, Fields, Metadata, Review Fields, Filters (Data Filters, Term Filters), Clients, Access Control, Review Tasks, Review Result, and Action Queue. The main content area is divided into sections: Matter Number, Matter Name, Client, Matter Status (dropdown), Matter Category (dropdown), Matter Description, Metadata & Filters (Metadata Template, Data Filter, Review Field Template, Default Term Filter), and Data Processing (DeNIST, Control Id Prefix, Control Id Length, Control Id Start Number, OCR Option, OCR Languages, Auto Index On Upload, Email Timezone, Detect Language).

Filling in Matter Details

1. Fill in all the applicable fields under the different tabs: Matter Config, Matter Data, Data Processing, Review Tasks, and Work Space.

Under the Matter Config tab:

1. Enter the Matter Number. In this field, you should enter a unique identification number for the matter you are creating.
2. Enter the Matter Name. In this field, you should provide a name that succinctly represents the matter you are working on.
3. Enter the Client. In this field, you should enter the name of the client associated with the matter.
4. Select the desired Matter Status from the dropdown list: Open, Closed, Near Line, or Offline. In this field, you can choose the current status of the matter from a dropdown list.
5. Select the Matter Category that best represents the type of matter. This field allows you to specify the category.
6. Enter the Matter Description. This is a text field where you can provide a detailed description of the matter.

This screenshot is similar to the first one but includes numbered callouts (1-6) in green circles pointing to the input fields: 1. Matter Number, 2. Matter Name, 3. Client, 4. Matter Status, 5. Matter Category, and 6. Matter Description.

Metadata & Filters

1. Choose the relevant Metadata Template, which defines the metadata fields to be extracted from files.

2. Select the Review Field Template, which determines the fields to be used during the review process.
3. Set the Data Filter to exclude specific data from indexing.
4. Configure the Default Term Filter to be used when a custodian term filter is not provided.

Metadata & Filters	
Metadata Template (metadata fields to be extracted from files) 1	Review Field Template (fields to be used in review) * 3
All	All
Data Filter (to exclude data from indexing) 2	Default Term Filter (used when custodian term filter is not provided) 4

Data Processing

1. Select the DeNIST option to remove non-relevant and redundant data during processing.
2. Enable the Auto Index On Upload feature to automatically index files upon upload.
3. Customize the Control Id Prefix, Length, and Start Number fields for controlling unique identifiers.
4. Set the Email TimeZone according to the appropriate time zone.
5. Configure OCR: Select the relevant OCR Option from the drop down list, enable Detect Language, and choose the relevant OCR Languages for optical character recognition purposes.

Data Processing	
<input type="checkbox"/> DeNIST 1	<input checked="" type="checkbox"/> Auto Index On Upload 2
Control Id Prefix * 3	Control Id Length *
Doc-	10
Control Id Start Number *	Email Timezone 4
1	Coordinated Universal Time
OCR Option 5	<input type="checkbox"/> Detect Language
Skip All Non-Text Image Files	
OCR Languages	

Custodians and Users

1. Under the Custodian section, locate and select the "Add Record" button. This allows you to add custodians associated with the matter.
2. Under the Users section, locate and select the "Add New User" button. This allows you to add a new user who will have access to the matter.

Custodians 1			
Name	Term Filter	Deduplication Level	Maintain Family
			<input type="checkbox"/>
			<input type="checkbox"/>

Users 2	
User	Title