



# Quickstart Guide to Fios **Prevail**<sup>®</sup>

## System Requirements

### Minimum

#### hardware

- 500 mHz processor
- 256 megabytes of RAM
- 384 kilobit per second connection to the Internet (Cable modem/DSL)
- Screen resolution of 800x600 (SVGA)

#### software

- Microsoft Windows® 98 or higher
- Microsoft Internet Explorer 6.0 with Service Pack 1 and the latest updates from Microsoft.

### Recommended

#### hardware

- 1 GHz processor
- 512 megabytes of RAM
- 1.5 megabit per second connection to the Internet (T-1)
- Screen resolution of 1024 x 768 (XGA)

#### software

- Microsoft Windows 2000 with Service Pack 2, or Windows XP

## Support

### Project

Project requirements, review strategy, delivery process, deliverables and scheduling are examples of questions or problems that your Project Manager (PM) can help you with.

#### Business hours

Varies depending on the time zone your PM is located in.

#### Contact

Email or call your PM directly.

### Technical

Prevail use, performance issues and errors are examples of questions and problems that the Fios Support team can help you with.

#### Business hours

6:00am – 6:00pm Pacific, M-F

#### After hours

Emergency issues

#### Contact

support@fiosinc.com

877-900-FIOS (3467)

### Fios Prevail Maintenance

Fios performs routine system maintenance at scheduled times. Prevail will not be available at these times. Prevail users that are online within 20 minutes before the maintenance start times will receive an email alert. In the event of an unscheduled maintenance event, Prevail users that are online will receive an email alert with instructions.

**Nightly:** 1 am to 2 am Pacific Time

**Saturday:** 7 pm to 11 pm Pacific Time

## About this guide

This Quickstart guide provides information for both first-time Fios Prevail users and existing Fios Prevail users with new computer hardware.

## Before you begin

Before you get started with Fios Prevail, execute the following steps to ensure that Fios Prevail runs smoothly on your system.

### step 1: Verify system software and hardware requirements.

Consult the list of system requirements in the left column of this guide and confirm that your computer meets or exceeds the minimum requirements.

### step 2: Obtain a username and password.

Username: [Your e-mail address] (i.e. john\_doe@abc.com)

Password: [Assigned by your Fios project manager and e-mailed to you]

### step 3: Verify Internet Explorer settings.

- Open an **Internet Explorer** window, click on **Tools** and select **Internet Options**. The Internet Options dialog appears.
- On the **General** tab, in the **Temporary Internet Files** section, click the **Settings...** button. The Settings dialog appears.
- Select the **Automatically** option under 'Check for newer versions of stored pages:'.
- Click **OK** to close the Settings dialog and return to the Internet Options dialog.
- Click on the **Security** tab.
- In the **Security Level for this zone** section, click on the **Trusted sites** icon.
- Click on the **Sites** button.
- Enter **https://\*.fiosdiscovery.com** in the 'Add this Web site to the zone:' text box.
- Click on the **Add** button.
- Remove check mark from "Require server verification (https:) for all sites in this zone'.
- Click on the **OK** button.
- Click on the **Default Level** button.
- In the Security Level for this zone slider, select **Medium**, **Medium Low**, or **Low**. Do not select High. In Internet Explorer 7, select **Medium Low**, or **Low**. Do not select High nor Medium.
- Click on the **Apply** button.
- Click on the **OK** button.

### step 4: Dealing with or disabling Pop-up blockers

Windows XP with Service Pack 2 (SP2) installed

- Open an **Internet Explorer** window
- Click on **Tools**
- Highlight '**Pop-Up Blocker**' in the list (If you do not see this option in the list that means you do not have XP-SP2.)
- Click on '**Pop-Up Blocker Settings ...**'
  - Enter **\*.fiosdiscovery.com** in the 'Address of Web site to allow:' text box.
  - Click on the **Add** button.
  - Click on the **Close** button

Yahoo toolbar with pop-up blocker

- Open an **Internet Explorer** window
- Under the Address area in Internet Explorer, do you see a big red capital **Y!** (letter y with an exclamation point)? (If you do not see this then you may not be running Yahoo toolbar)
- Click on the icon of a box with a shield in front of it, to the right of the search web button.
- If there is a checkmark next to "Enable Pop-Up Blocker", click on "Enable Pop-Up Blocker" to remove the check mark. (This will turn off the Yahoo pop-up blocker.)



## Tips and Tricks

- **Start fresh**  
Before logging on to Fios Prevail, always start with a fresh web browser window. If the web browser has remained at the log on page for an extended period of time, close the browser and start with a fresh browser window.
- **Add Fios Prevail to your Internet Favorites**  
To add Fios Prevail to your Internet Explorer Favorites list, click the **Add to Favorites** link from the Fios Prevail logon screen.
- **Secret question and answer**  
We strongly encourage you to set your password question in Fios Prevail's Options window. Entering this question allows you to temporarily log on if you forget your password.
- **Default start page for Fios Prevail**  
Click the **Options** button, and go to the **General** tab of the **Options** window to select a default start page to be used whenever you start a Fios Prevail session. Likewise, you can set a default Search type.
- **Shortcut menus & hot keys**  
Many areas of Fios Prevail have shortcut or right-click menus to quickly access a set of functions. For example, every list and item view has a shortcut menu. Most every action in Fios Prevail is accessible via the keyboard by using the ALT key + a "hot key." As in Windows®, the hot key is the underlined letter on the button caption, checkbox, etc. For example, to "click" the Search button, you can press ALT + S.

Special hot keys that don't require pressing the ALT key first are:

Arrow keys to move to previous item or next item

Enter "clicks" the default button

Esc "clicks" the Cancel or "X" button

When viewing an imaged document, you can manipulate it with the following hot keys:

Ctrl+(arrow keys) to move to the next/previous page.

Ctrl+Shift+(arrow keys) to rotate the image 90 degrees to the left/right, or invert the image.

Ctrl+(mouse click) to zoom in (left mouse) or zoom out (right mouse) .

Goggle toolbar with pop-up blocker

- a. Open an **Internet Explorer** window
- b. Under the Address area in Internet Explorer, do you see **Google?** (If you do not see this then you may not be running Google toolbar)
- c. Click on the **Options** button located on the Google toolbar
- d. Remove the checkmark next to **'Popup Blocker'** in the Accessories section
- e. Click on **OK** (This will turn off the Google pop-up blocker.)

## Logging on to Fios Prevail

### step 1: Access the Fios Prevail site.

From Internet Explorer, go to (don't forget the "s" in "https" !):

- <https://ww2.fiosdiscovery.com>
- <https://www.fiosdiscovery.com> (if using digital certificates for extra security)

### step 2: Enter your username and password.

For security purposes, you are prompted to change your password upon your first logon to Fios Prevail. Passwords are case-sensitive and must be 6 or more characters and contain at least one digit or special character.

## Understanding the Fios Prevail Interface

Fios Prevail is a review and production tool for electronic documents. After Fios® processes your electronic discovery data, you can view, search, organize, categorize, annotate, and produce it using Fios' highly secure web application, Fios Prevail. The application interface is organized into the five main sections described below.

**Matter Summary** The Matter Summary page displays information about the document collection, including the status of items, how many items have been reviewed, the publishing history, and logon session history.

**Search** The Search page allows you to conduct searches to locate specific items in the matter. You can search for items based on concept, keyword, item type, date, e-mail field, category, FENS® number, or annotation text.

**Results** Once you have conducted a search, the Results page displays a list of the items returned by your search. You can save your search and filter, sort, and categorize search results on the Results page.

**Organizer** Create and manage categories using the Organizer. Categories are used by your review team to "tag" or "code" documents. Select a category to view the documents you or your team have already tagged.

**Folder View** The Folder View provides you with a hierarchical view of your document collection. The Folder View page mirrors, as closely as possible, the file structure of documents as they resided on their original media. The Folder View page organizes the items in your document collection by Matter, Package, Media, Folder, and Item.

## Searching for Documents

The ability to locate items using a variety of search criteria is a key feature of Fios Prevail. Combining multiple search criteria and restrictions allows you to create very specific searches easily.

### To run a concept search

If your administrator has enabled Fios Prevail's Concept Searching features, you can follow the steps below to conduct your first Concept Search.

1. Select **Concept** from the **Create Search Criteria** list on the Search page.
2. Enter (you can also paste text copied from a document or email using Ctrl-V) a concept in the **Find items that contain concepts...** text box. Optionally, click **Analyze for Concepts** to see the concepts your query will hit on. This is a good way to get a "sneak peek" at the results without actually running the search.
3. Click the **Add to criteria** button.
4. Click the **Search** button to conduct your search. Fios Prevail's Concept Search engine searches for items that are conceptually related to the text you entered.

### To run a full-text keyword search

1. Select **Keyword** from the **Create Search Criteria** list on the Search page.
2. Enter the text terms or phrases that you wish to search for in the **Find items that contain...** text box.

# Tips and Tricks

(cont'd)

- **Disabled buttons**  
Depending on your user account permissions, some actions may not be available to you.
- **Primary / Duplicate**  
As we inventory data, each document is digitally fingerprinted and then compared to every other document. When fingerprints match, new documents are flagged as duplicates. Documents with duplicates are easily recognized in the Item view: their duplicate count is greater than 0 and a [View](#) link appears.
- **Speed up your searches**  
To speed up the search result return rate, break your search into FENS segments. For example, use the parameters: Items in Group X and Items with FENS between X and X. Breaking up these result sets into smaller chunks will make the review more manageable and improve search performance.
- **Concept vs. keyword search**  
If you need to know if a word or phrase actually appears in a document, your best tool is a keyword search. For example, you should run a keyword search if the presence of an attorney's name in a document automatically makes it Privileged. Yet, a concept search on an attorney's name might help you find concepts related to the attorney, for example, the attorney's co-workers or a project the attorney worked on.
- **Concept Analyzer™**  
Available from the Concept Search page, the Concept Analyzer evaluates the text of your query for concepts and displays a list of the top 100 conceptually related terms. In effect, it provides a "sneak peek" at the terms that would be highlighted in documents should you run the search. Since the terms come directly from your documents, you can use the Concept Analyzer to get an idea of what other similar keywords exist in your collection.
- **Changing order of list columns**  
While you can't change the order of list columns from within Fios Prevail, contact your Fios project manager and they can do it for you. You can have different columns displayed in each of the main list views (Results, Organizer, and Folder View).
- **Arrow buttons disabled/missing**  
When you navigate to a new item via an email attachment link or using the Chain Explorer, you are jumping out of the current list of items (e.g. a Results or Folder View list) and there is no "previous" or "next" item. To return to the main list and get your arrow buttons back, use the Back button to return to the previous item or, in the Chain Explorer, double-click the "anchor" item.

3. **Optional:** To search for multiple terms, use the following search operators:

|         |  |
|---------|--|
| and     | both words must be present                       |
| or      | either word is present                           |
| and not | only first word is present                       |
| *       | matches any number of characters                 |
| (...)   | group terms logically together using parentheses |

**Note:** For more text searching keywords and parameters, see Fios Prevail's online help.

4. Click the **Add to Criteria** button.
5. Click the **Search** button to conduct your search.

## To restrict a search

1. From the **Search Options** dropdown list, select one of the methods for restricting a search. For example, you can limit your search to include only items of a certain **Category, Group or Media**, or search only certain **E-mail** fields, **Annotation** text, or only items in a certain **Date** range.
2. Modify your search restriction to build search criteria and click **Add to Criteria**. You can add multiple search restrictions; just remember to click the Add to Criteria button after each one. For example:

Items containing the text `confidential`  
Items in the category `Privileged`  
Items of type `Spreadsheet`

**Note:** Each criteria in the list is "AND"ed together. In other words, the search results will be the intersection of all the search criteria. So, the search in the example above would return all spreadsheet items in the Privileged category that contain the text "confidential".

3. Click the **Search** button to conduct your search.

## Working with Results and other Document Lists

After conducting a search, the Results page displays a list of the items that matched your search criteria. You can filter, sort, and categorize items right from the Results page.

### Filtering Search Results and other lists

Lists throughout Fios Prevail may be filtered to simplify or reduce the number of items displayed. Above each list is a series of dropdown boxes or filters:

- Reviewed/Not Reviewed filter restricts the list to only those items already categorized or annotated.
- Read/Unread filter limits the list to only those items you personally have read or not read.
- Primary/Duplicate filter limits the list to primary or duplicate items only.

### To categorize multiple documents


1. From either the Results or Organizer list views, click **Categorize**. The **Categories** pane appears on the right side of the Fios Prevail window.
2. From the **Categories** pane, select a categorizing option: **Only checked items**, **All items on this page**, **All items on ALL pages**.
3. From the list of items, check or uncheck individual items. (If you selected **All items on ALL pages** as the categorizing option, individual item checkboxes are disabled.)
4. From the **Categories** pane, check the target categories and click **Apply**.

**Note:** If **auto-refresh** is enabled in your Options window, as you check and uncheck individual items, the Categories Pane will automatically refresh to reflect the status of the checked items.

## Reviewing Documents

You can review documents in the Results, Organizer, or Folder View areas of Fios Prevail. Each area provides a different way to look at your documents via their unique list views. From any list view, you can drill down to an item view.

### To view a document

- From any list view, double-click a document in the list. Alternatively, you can select a document and press **Enter**, or right-click and select **Open** from the shortcut menu.
- If you're already viewing a document, use the arrow buttons (or arrow keys) to jump to the next item.
- If the item is a part of an e-mail chain, an icon  will appear next to the Item Name in the item header. Click the icon to display the Chain Explorer™, which allows you to review and categorize the entire e-mail chain or "family." For more information on the Chain Explorer, see Fios Prevail's online help.

# Tips and Tricks

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- **Sorting shortcut**

Right-click on column headings in Prevail list views and choose the sort order directly (either Ascending or Descending).

- **Find on This Page**

To find a word or phrase in the document you are currently viewing, press **Ctrl+F**.

- **What is a "chain?"**

A chain is a group of items that are linked together via parent-child relationships. For example, e-mails and their attachments or compressed (.ZIP) files and the files they contain. E-mail chains are different than e-mail threads which include all of an e-mail's forwards and replies. Prevail's Chain Explorer™ visually displays chains for both e-mails and compressed files.

- **Number of items/nodes in the Chain Explorer**

While this setting can be adjusted by Fios on the backend, to ensure optimum performance, the default setting is 50.

- **What does the number in parentheses after the FENS number mean?**

This number is the count of all items below the selected item in the chain (immediate "child" items plus any further descendents). To avoid over-complicating the Chain Explorer view, there are some instances when either none or only some of the descendents are displayed.

- **Disabled "Categorize from here down" menu option**

This Chain Explorer right-click menu option can be disabled for a couple of reasons: There are no items beneath to categorize (as is the case when selecting an item at the end of the chain), or there are items beneath the selected item but too many to display and therefore cannot be categorized.

- **Did I lose my work?**

As soon as you check a category checkbox and click **APPLY**, categorizations happen immediately. So, if your computer crashes or you happen to get automatically logged out, your work will not be lost.

- **No view available?**

If we can't provide an HTML view of a document, you can always download the original file and try to view it on your local computer.

- **Got logged off?**

To maximize security of your data, Prevail automatically logs you off after a period of inactivity.

- **Remember to log off**

Remember to click the Log Off button when you're done. This ensures your project's usage activity reports are accurate.

## To categorize or flag documents

Fios Prevail supports a few different ways to quickly categorize documents. The most efficient method for you will depend on your review protocol or strategy.

- If you typically need to put a document into a single category such as "Responsive," then use the right-click or shortcut menus available in the Item View (right-click in the document body) or in the Chain Explorer (right-click on a node). This lets you to maximize your screen real estate for viewing the document and lets you keep the Chain Explorer displayed at all times for quick access to features like "Categorize from here down."
- If you typically need to put a document into multiple categories, then use the Categories pane. This enables you to check multiple categories and then apply the changes at once. The downside is that you can't have the Categories pane and the Chain Explorer displayed at the same time.

## To download a copy of the original file

1. From a list or Item View, click the **Download** button.
2. When prompted, choose to **Open** or **Save** the file to your local computer.

## Logging out of Fios Prevail

Always log out of Fios Prevail at the end of your session by clicking the **Log Out** button on the toolbar.

