Leverage Project Management & Technology for a Streamlined Review

IPRO Innovations 2009 Conference

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Agenda

- Manage the Triple Constraints
- Scope Projects & Identify Stakeholders
- Requirements Gathering
- Leverage Technology to Execute

Manage the Triple Constraints

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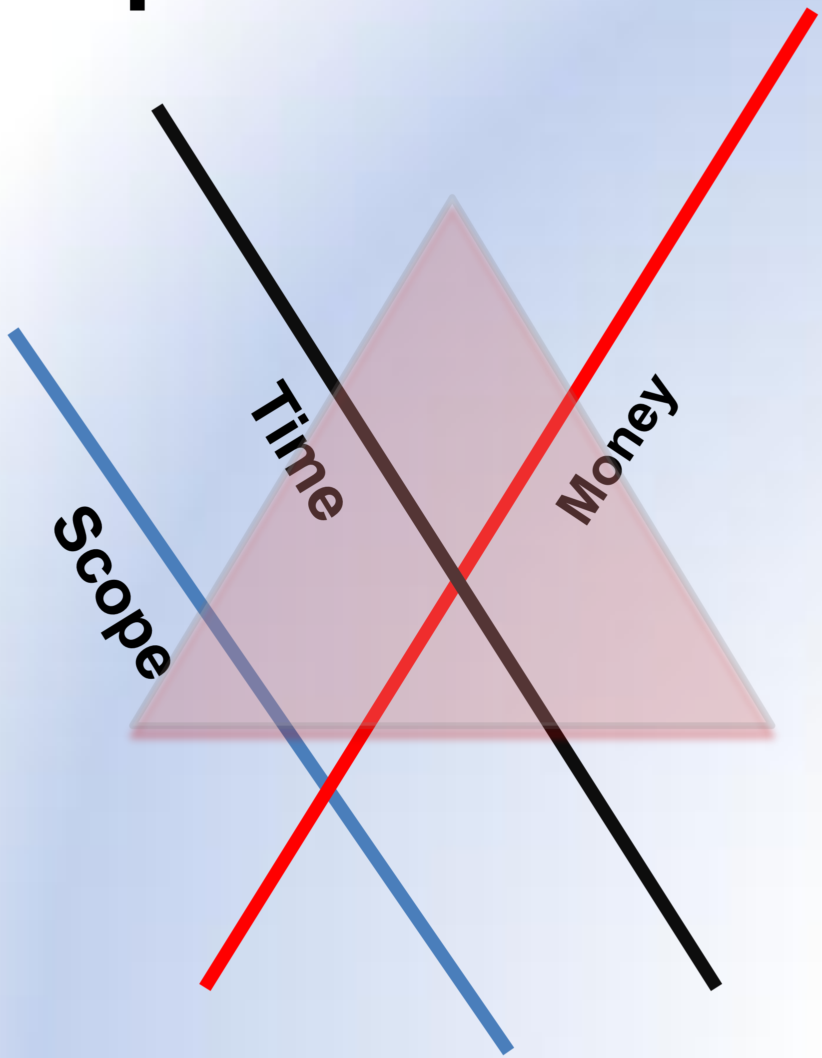
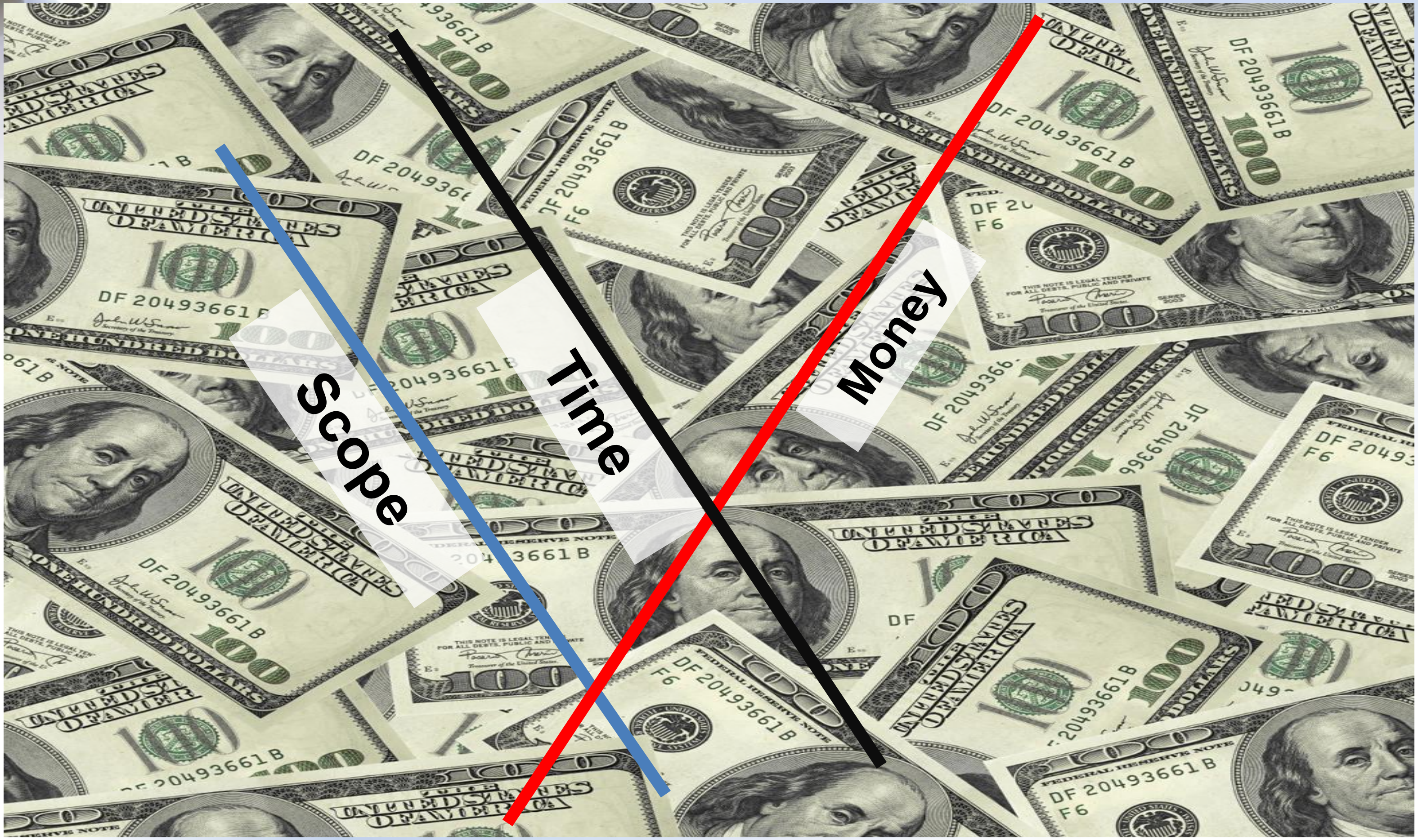
NOT Managing the Triple Constraints



Project Outcome



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Scoping Projects & Identification of Stakeholders

- Sample Questions to ask:
  - Objective of project 

    (The “What” Questions, including what’s NOT part of the project - e.g., first pass, nth pass, 2d request, issue and/or production tagging)
  - Deadlines 

    (e.g., discovery deadlines & cut off, depositions, hearings, trial)
  - Budget 

    (e.g., resources & constraints: who, where, how much)

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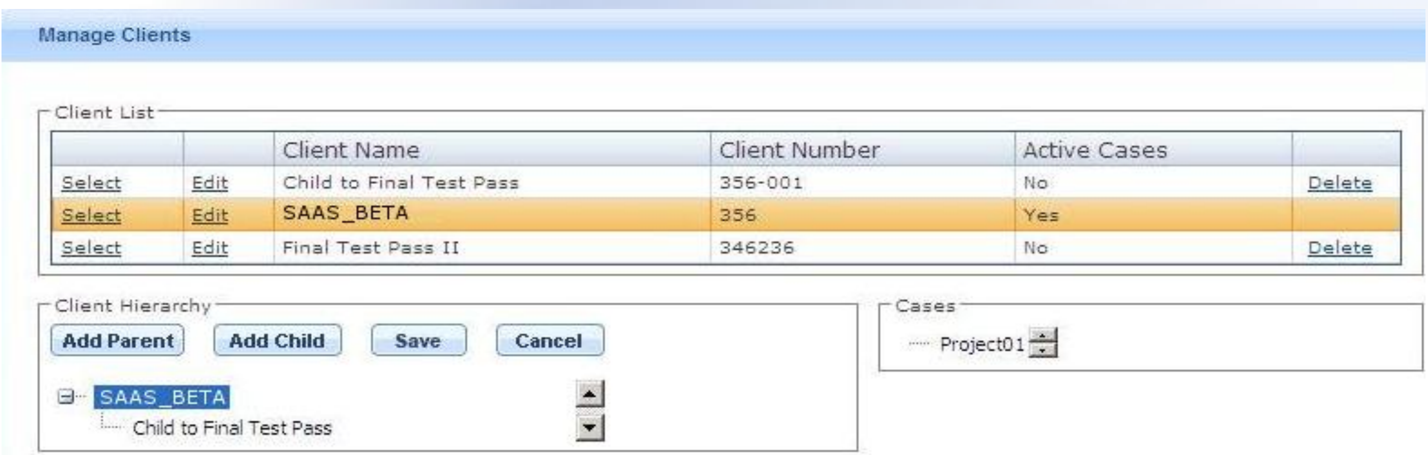
Real World Use – eReview Manage Clients

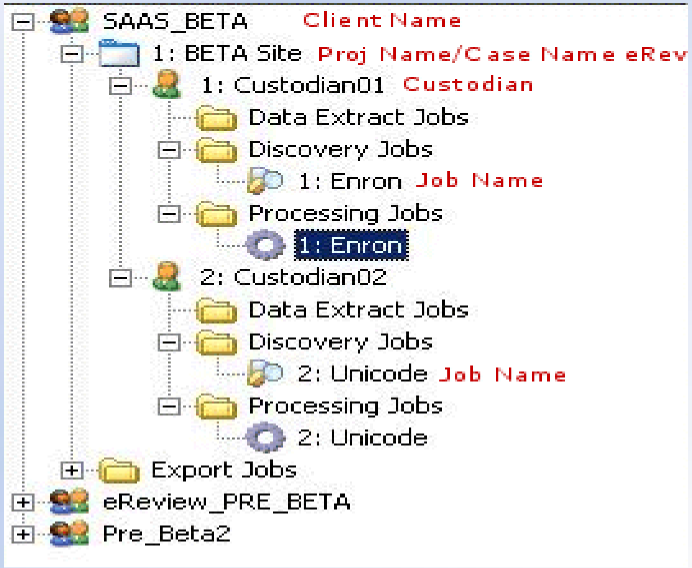
- Create a hierarchy of clients within eReview
  - This permits organization of client information from within eReview rather than only from eCapture (Administration, Clients, Manage Cases)
- Activate Jobs (Administration, Clients, Activate Jobs)

Note: Project Name in eCapture is maintained in eReview as Case Name



Manage Clients (cont.)

- Process data through IPRO eCapture™ to create jobs and prepare for eReview.

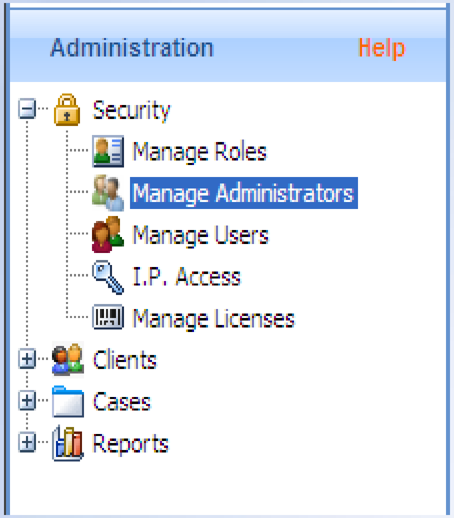


(View of eCapture Tree of Client, Project, Custodian & Jobs)

Note: Project Name in eCapture is maintained in eReview as Case Name

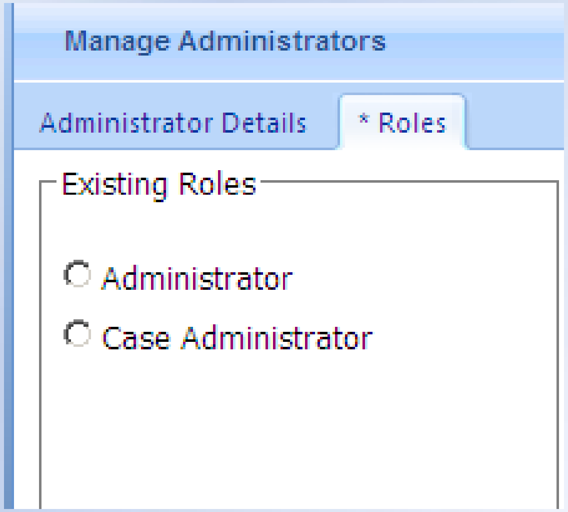
Stakeholders

- Understand project objective and stakeholder roles. Set up administrators and users based on roles.



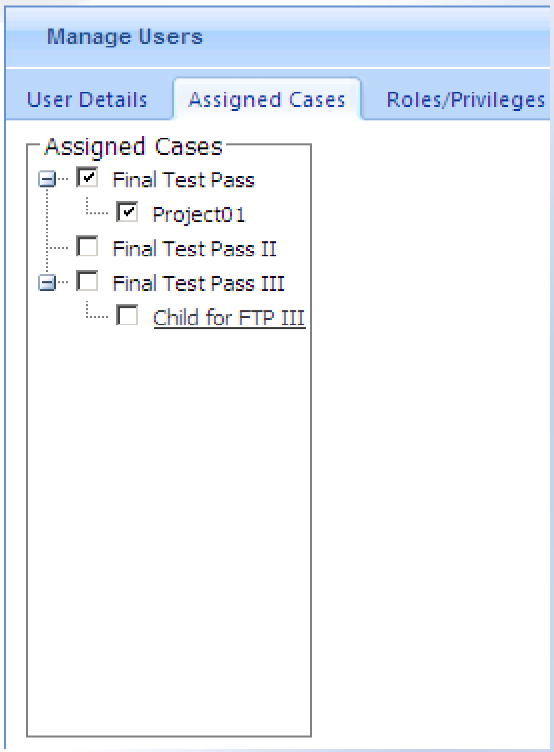
Stakeholder - Administrators

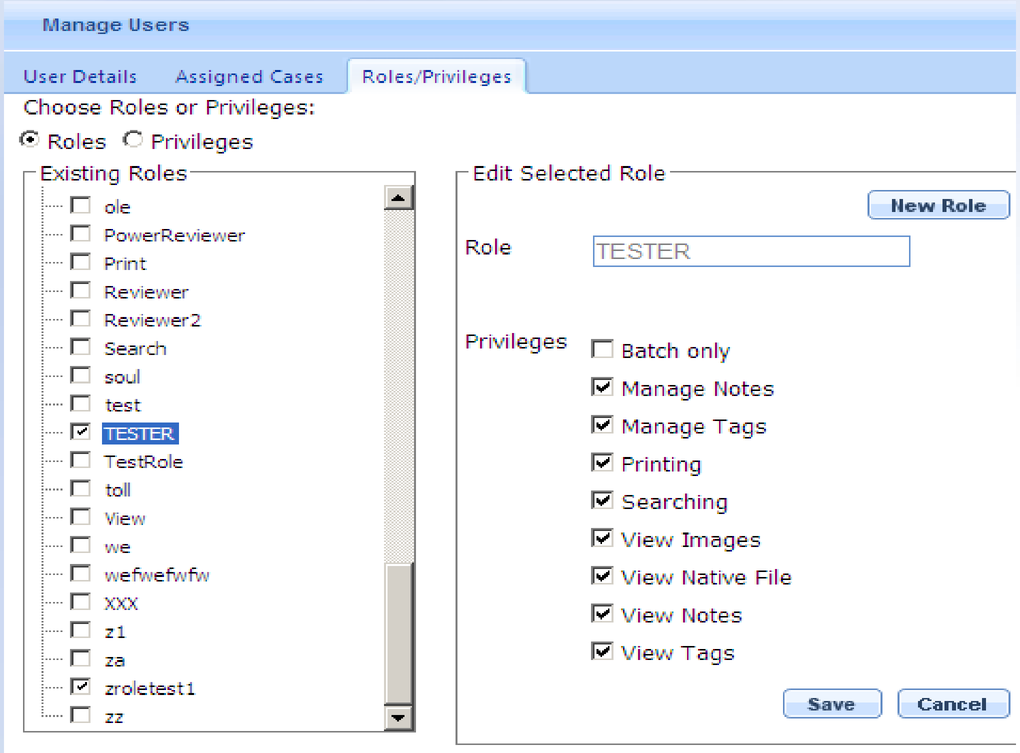
- Administrator roles – several types



Stakeholder - Users

- Assign to project, role & privileges





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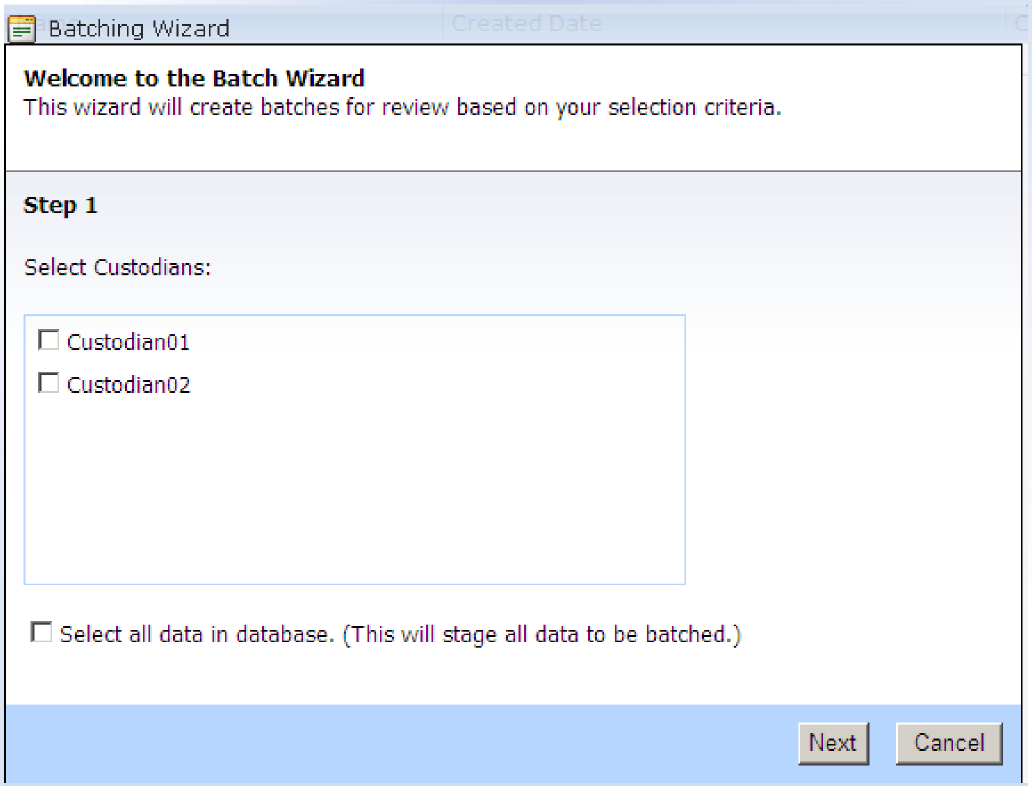
Identify Requirements

- Review Methodology
  - Filters
  - Types of review (e.g., production, subjective issue, damages)
  - Levels (e.g., first pass, second request)
  - Coding (hotkeys)
- Batching
  - Align resources to review approach and skill level of reviewer
- Group & Tag Management
  - Group rules: customize review workflow steps

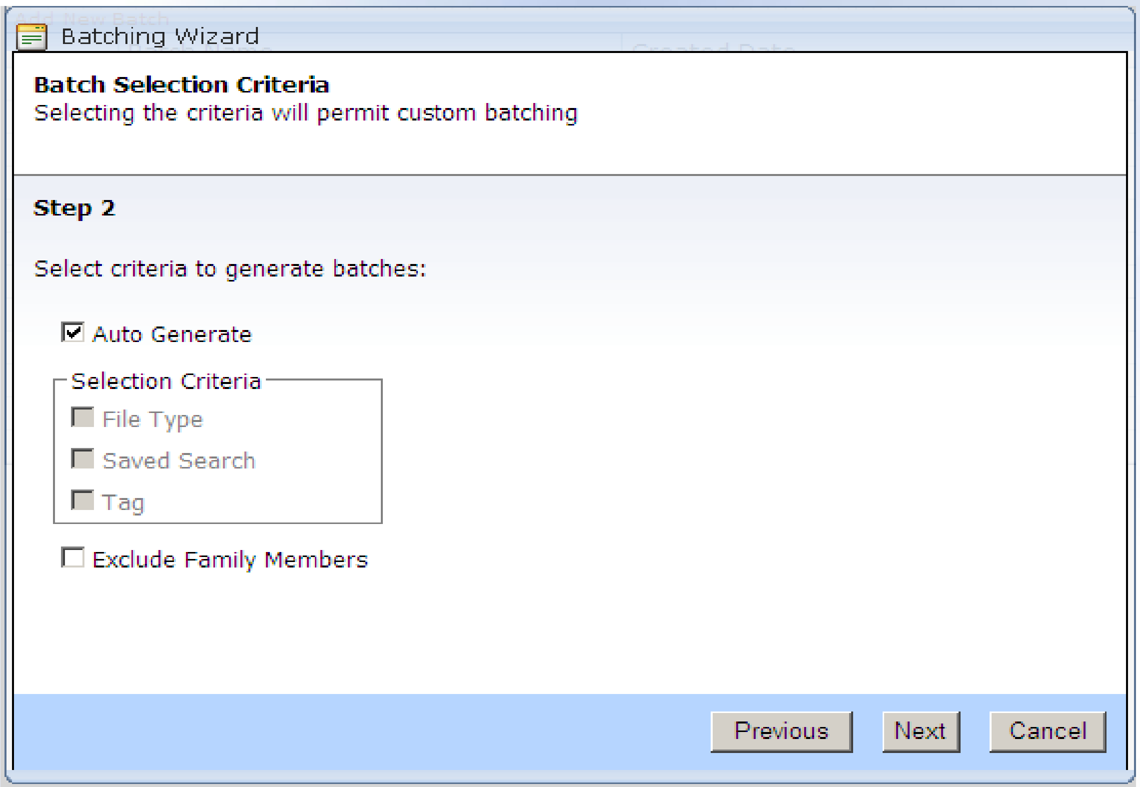
Batching

- Select data and criteria to be batched



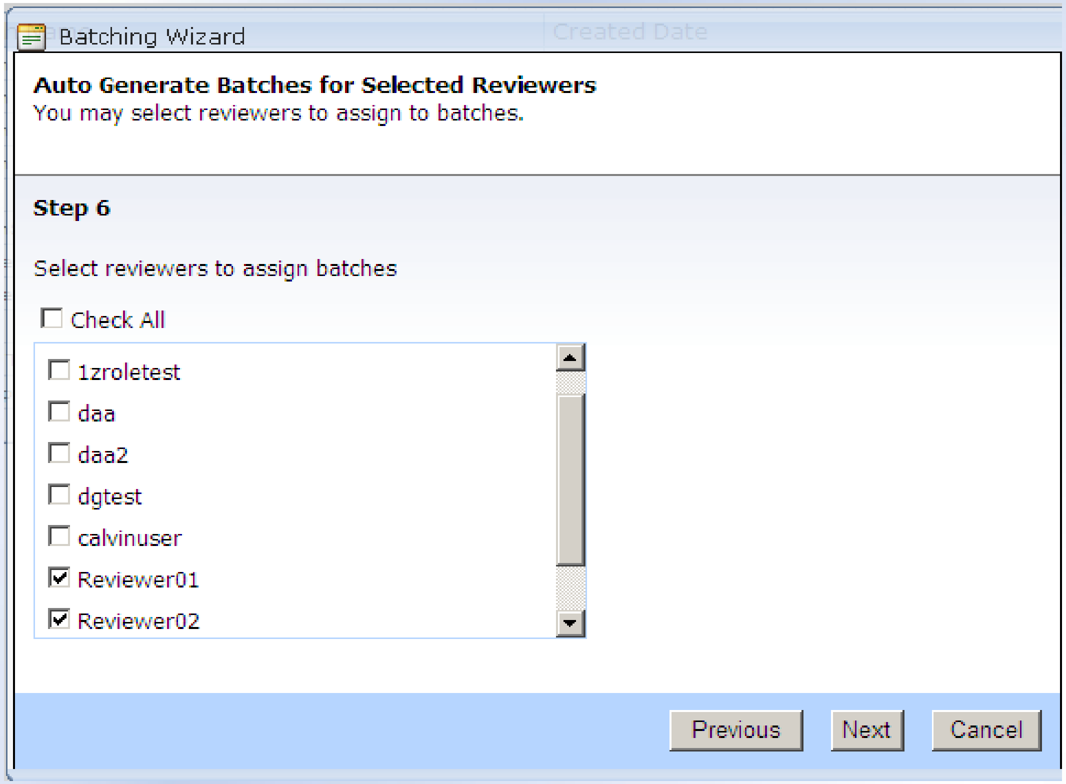
Batch Creation (cont.)

- Select filter criteria



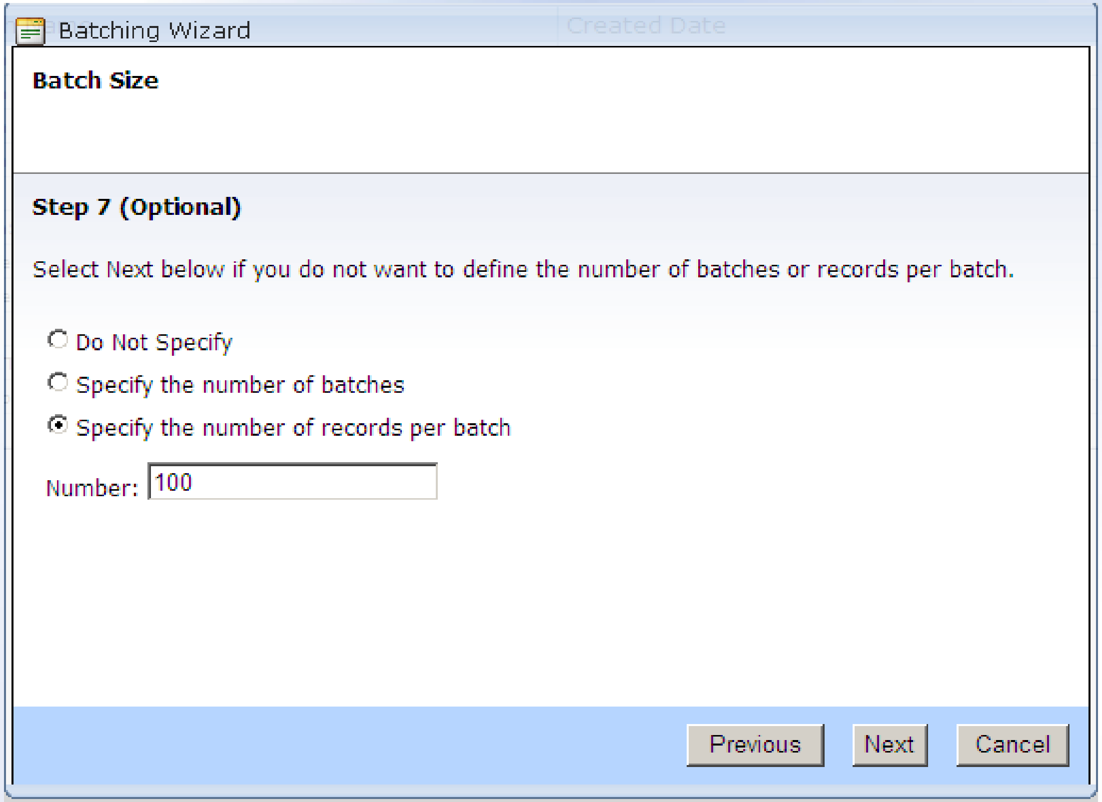
Batch Creation (cont.)

- Select Reviewer



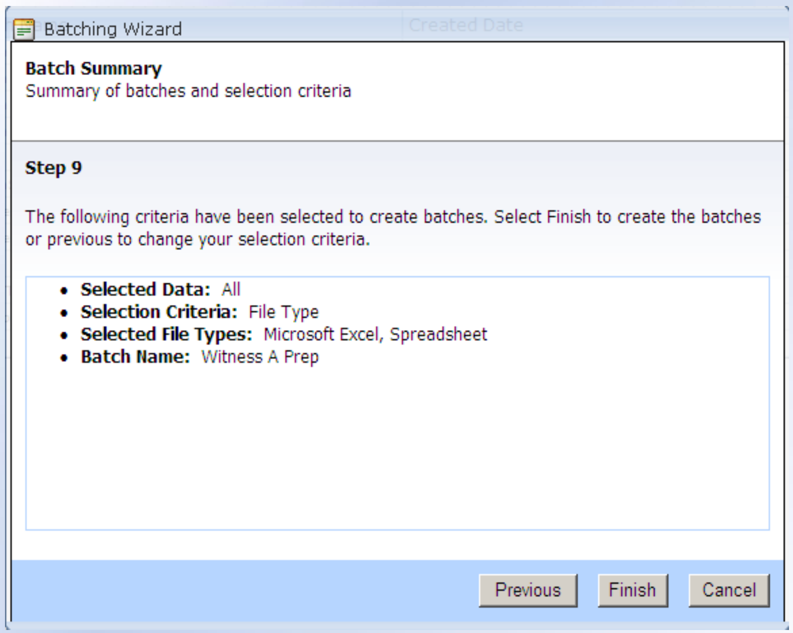
Batch Creation (cont.)

- Select Batch/Record Sizes



Batch Creation (cont.)

- Batch summary



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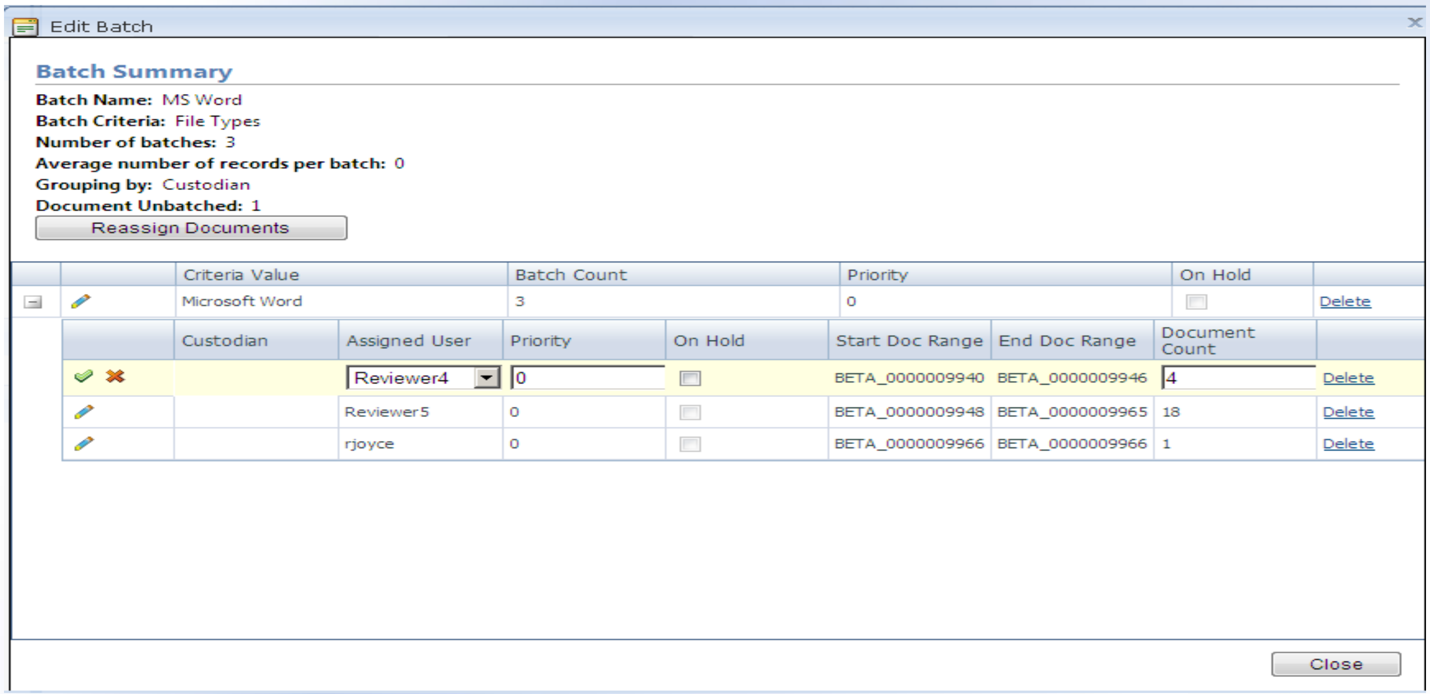
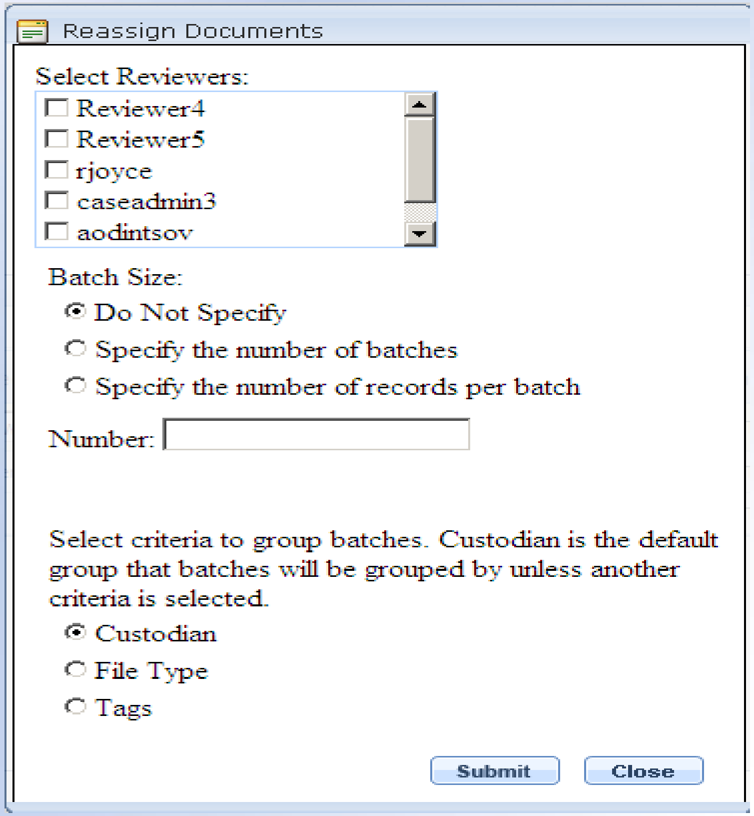
Batch Edits

- Batch Summary appears at top, expand node to edit specific batch



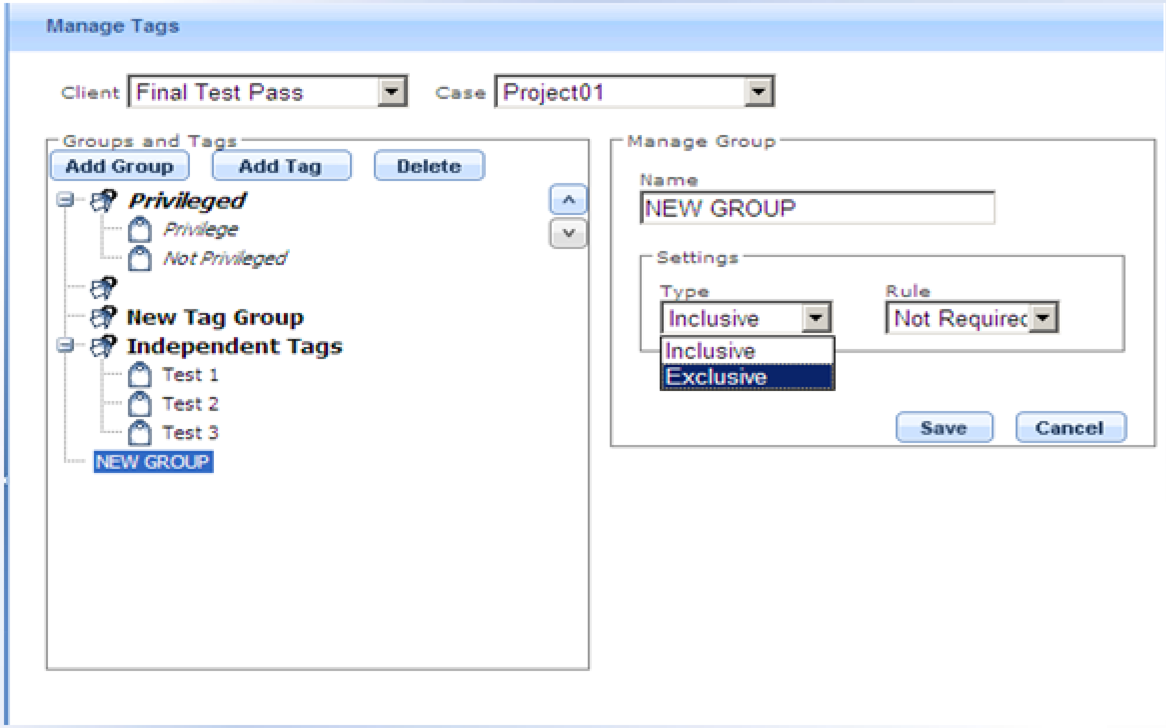
Batch Edits (cont.)

- Select Reassign Documents for documents when document count has been changed



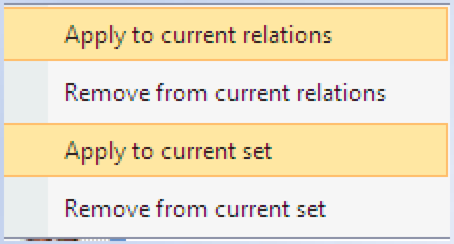
Customize Review Workflow

- Create Tag Group based on review methodology - apply rule & type



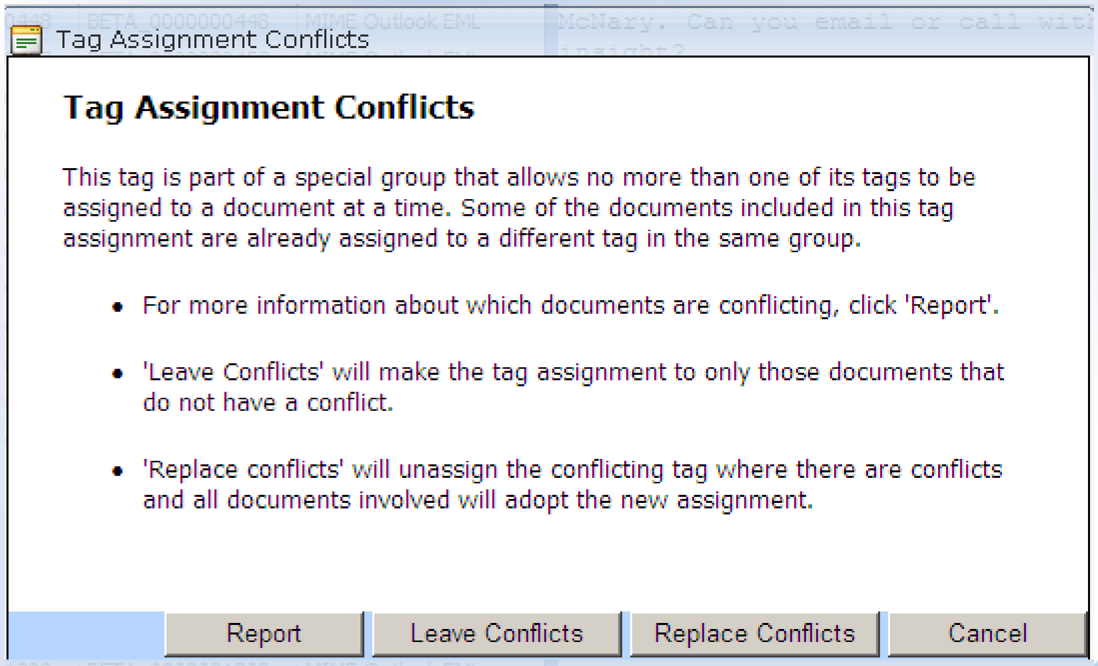
Applying Tags with Group Rules

- With Group Rules, a conflict could arise for records tagged within an exclusive group.



Tag Assignment Conflicts

- If a tag assignment conflicts, a window appears for selection of next steps. Selecting report will provide a list of the document IDs with the conflict.



Tag Assignment Conflicts (cont.)

- Report (exclusive within exclusive group – for different tag)

Future releases will provide a conflict report of tags to be moved from inclusive to exclusive groups

Tag Assignment Conflict Report - Windows Internet Explorer

Print Report

eReview Tag Assignment Conflict Report

Generated by ADMINISTRATOR at 4/17/2009 1:28:19 PM

Case:	**Project01**
Tag Group:	**NEW GROUP**
Tag Assignment:	**New Tag Child 3**

This tag is part of a special group that allows no more than one of its tags to be assigned to a document at a time. Some of the documents included in this tag assignment are already assigned to a different tag in the same group. Below is a list of conflicting documents and their current tag assignments.

note: *If scripts are enabled in your browser when viewing this file locally, the mouse can be used to provide useful color coordination when hovering over/clicking the rows below.*

DocID	Tag	DocID	Tag	DocID	Tag	DocID	Tag	DocID	Tag
10)	New Tag Child	11)	New Tag Child 2	12)	NEW TAG 01	14)	NEW TAG 01	15)	New Tag Child

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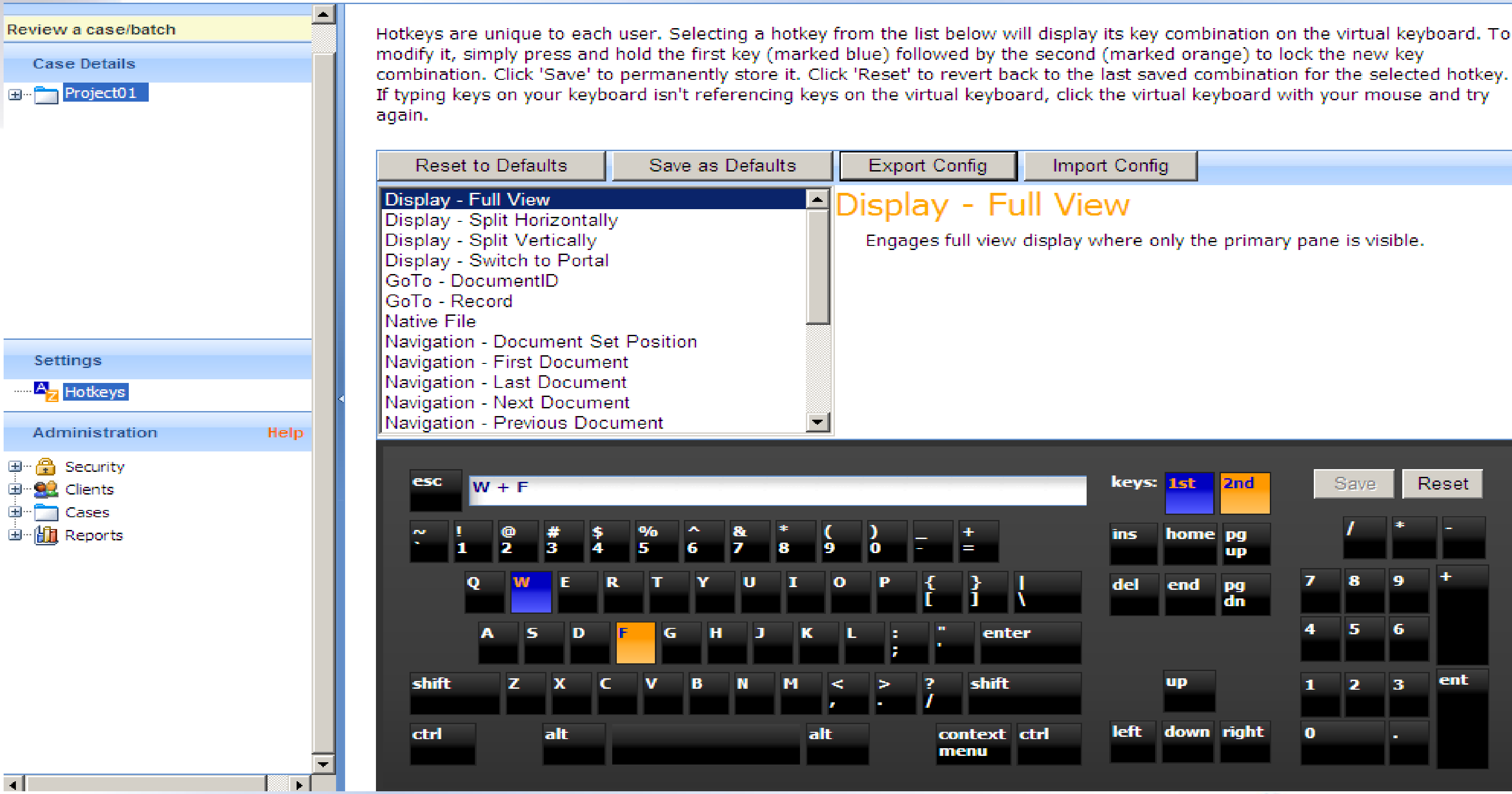
Hotkeys

- User or case level



Leverage Technology to Execute

- Licensing pool provides greatest flexibility to allow fluctuations in usage through client hierarchy.
- Save time to manage licenses
- Save Costs by buying only what you need and not for Administrative tasks

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Licensing Pool Examples

1. **All children fish for licenses from Client A parent.**

    Client A - assigned 200 licenses.

    Client A Child 1 - assigned 0 licenses

    Client A Child 2 - assigned 0 licenses

    Client A Child 3 - assigned 0 licenses

2. **Child 3 fishes from parent which is 0.**

    Client A Child 3 needs access cut off, but not Child 1 & 2. To lock out Child 3, make the following changes to your license assignments (**This is until client & case locks are in place in future release).

    Client A - assigned 0 licenses.

    Client A Child 1 - assigned 100 licenses

    Client A Child 2 - assigned 100 licenses

    Client A Child 3 - assigned 0 licenses

Licensing Pool Examples (cont.)

3. **CLIENT lock in place on Child 3.**

   [Assumption: cases under Child 3 all related. If a CASE lock is desired, for Case Produced Data, this would be done through the Case Lockout feature, not through licenses.]

   Client A - assigned 200 licenses.

   Client A Child 1 - assigned 0 licenses

   Client A Child 2 - assigned 0 licenses

   Client A Child 3 - assigned 0 licenses

   [Client Lock would lock down 3 below cases]

   Case All Database

   Case Privilege Database

   Case Produced Database [Case lock would be done through Case Lockout, not by changing licenses on the case level.]

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Leverage Technology to Execute (cont.)

- Web-based Review advantages:
  - Centralized location
  - Distributed
  - Parallel processes by different resources

Summary

- Determine Requirements
- Identify key stakeholders
- Identify priorities
- Identify resources
- Manage the triple constraints
- Execute by leveraging resources

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