



Leverage Project Management & Technology for a Streamlined Review

IPRO Innovations 2009 Conference


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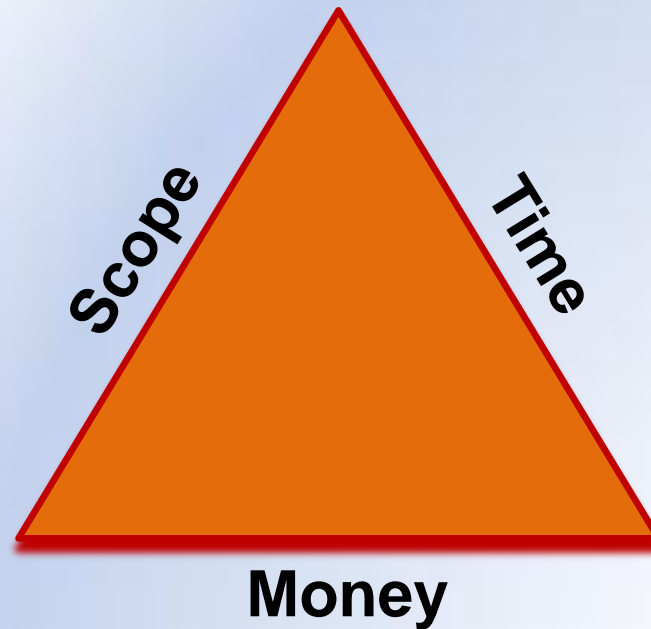


Agenda

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

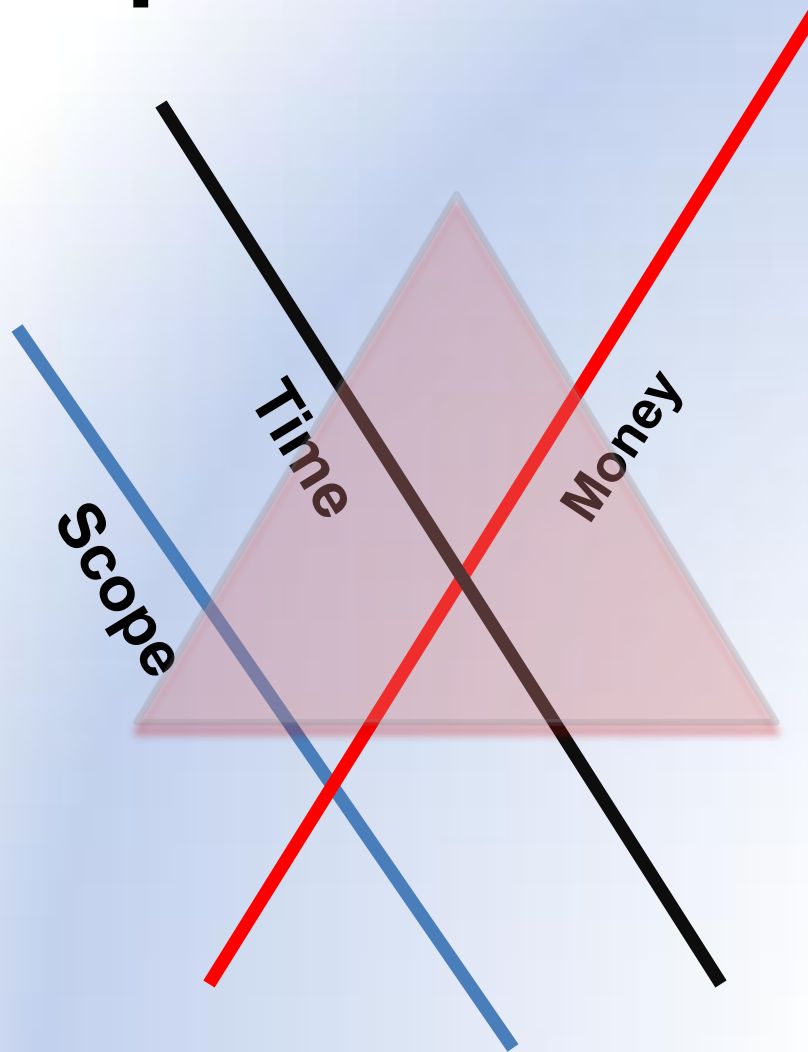


Manage the Triple Constraints

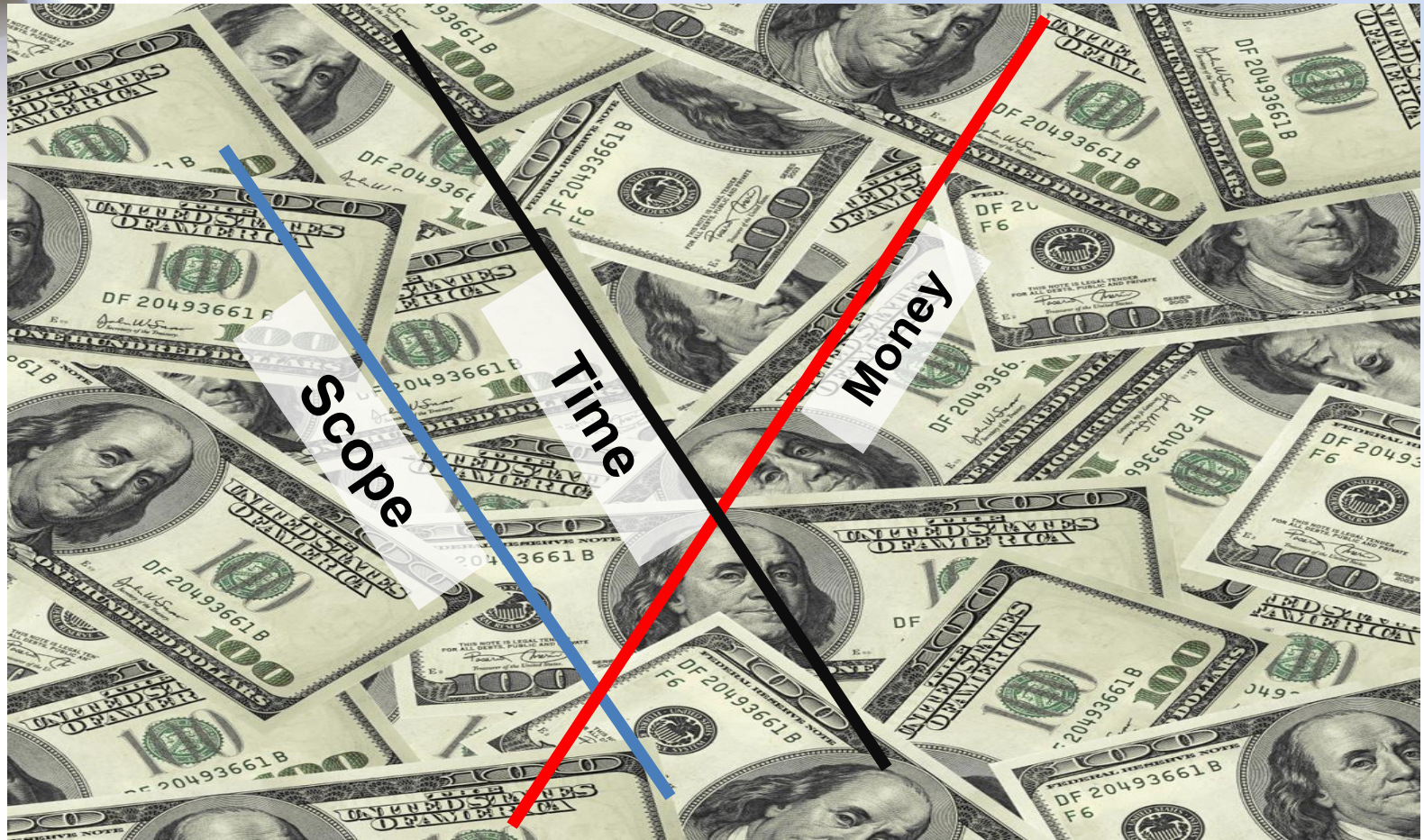




NOT Managing the Triple Constraints



Project Outcome





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)

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

Client List

		Client Name	Client Number	Active Cases	
Select	Edit	Child to Final Test Pass	356-001	No	Delete
Select	Edit	SAAS_BETA	356	Yes	
Select	Edit	Final Test Pass II	346236	No	Delete

Client Hierarchy

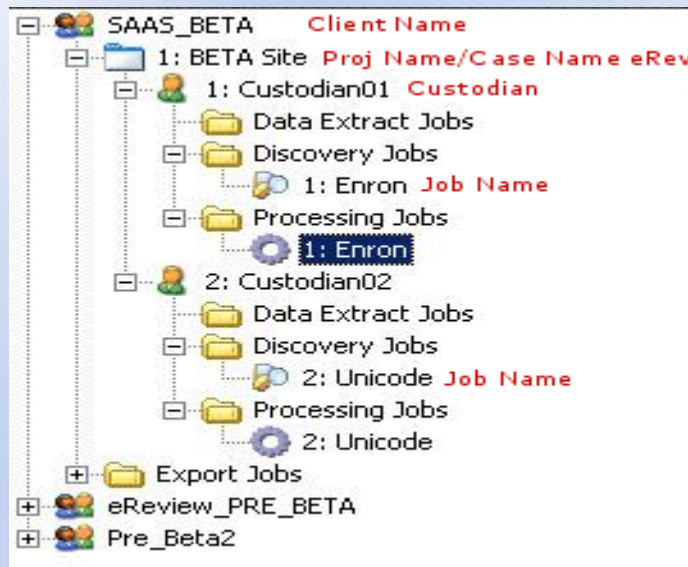
[-] SAAS_BETA
 [-] Child to Final Test Pass

Cases

..... Project01

Manage Clients (cont.)

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



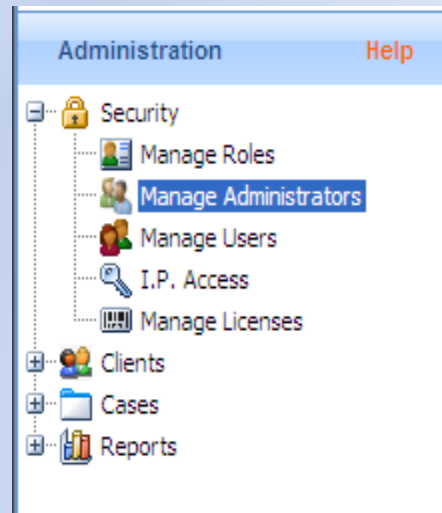
(View of eCapture Tree of Client, Project, Custodian & Jobs)

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



Stakeholders

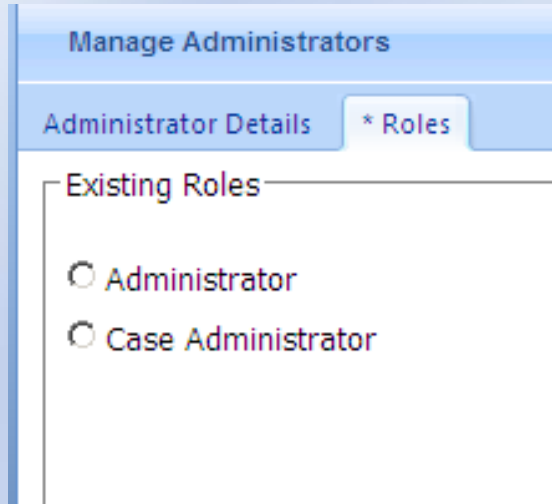
- Understand project objective and stakeholder roles. Set up administrators and users based on roles.





Stakeholder - Administrators

- Administrator roles – several types



Manage Administrators

Administrator Details * Roles

Existing Roles

Administrator

Case Administrator

Stakeholder - Users

- Assign to project, role & privileges

The screenshot shows the 'Manage Users' application with the 'Assigned Cases' tab selected. The 'Assigned Cases' list is as follows:

Case Name	Assigned
Final Test Pass	<input checked="" type="checkbox"/>
Project01	<input checked="" type="checkbox"/>
Final Test Pass II	<input type="checkbox"/>
Final Test Pass III	<input type="checkbox"/>
Child for FTP III	<input type="checkbox"/>

The screenshot shows the 'Manage Users' application with the 'Roles/Privileges' tab selected. The 'Choose Roles or Privileges' section has 'Roles' selected. The 'Existing Roles' list is as follows:

Role Name	Selected
ole	<input type="checkbox"/>
PowerReviewer	<input type="checkbox"/>
Print	<input type="checkbox"/>
Reviewer	<input type="checkbox"/>
Reviewer2	<input type="checkbox"/>
Search	<input type="checkbox"/>
soul	<input type="checkbox"/>
test	<input type="checkbox"/>
TESTER	<input checked="" type="checkbox"/>
TestRole	<input type="checkbox"/>
toll	<input type="checkbox"/>
View	<input type="checkbox"/>
we	<input type="checkbox"/>
wefwefwfw	<input type="checkbox"/>
XXX	<input type="checkbox"/>
z1	<input type="checkbox"/>
za	<input type="checkbox"/>
zroletest1	<input checked="" type="checkbox"/>
zz	<input type="checkbox"/>

The 'Edit Selected Role' section shows the role name 'TESTER' in the 'Role' field. The 'Privileges' section has the following checked items:

Privilege	Checked
Batch only	<input type="checkbox"/>
Manage Notes	<input checked="" type="checkbox"/>
Manage Tags	<input checked="" type="checkbox"/>
Printing	<input checked="" type="checkbox"/>
Searching	<input checked="" type="checkbox"/>
View Images	<input checked="" type="checkbox"/>
View Native File	<input checked="" type="checkbox"/>
View Notes	<input checked="" type="checkbox"/>
View Tags	<input checked="" type="checkbox"/>

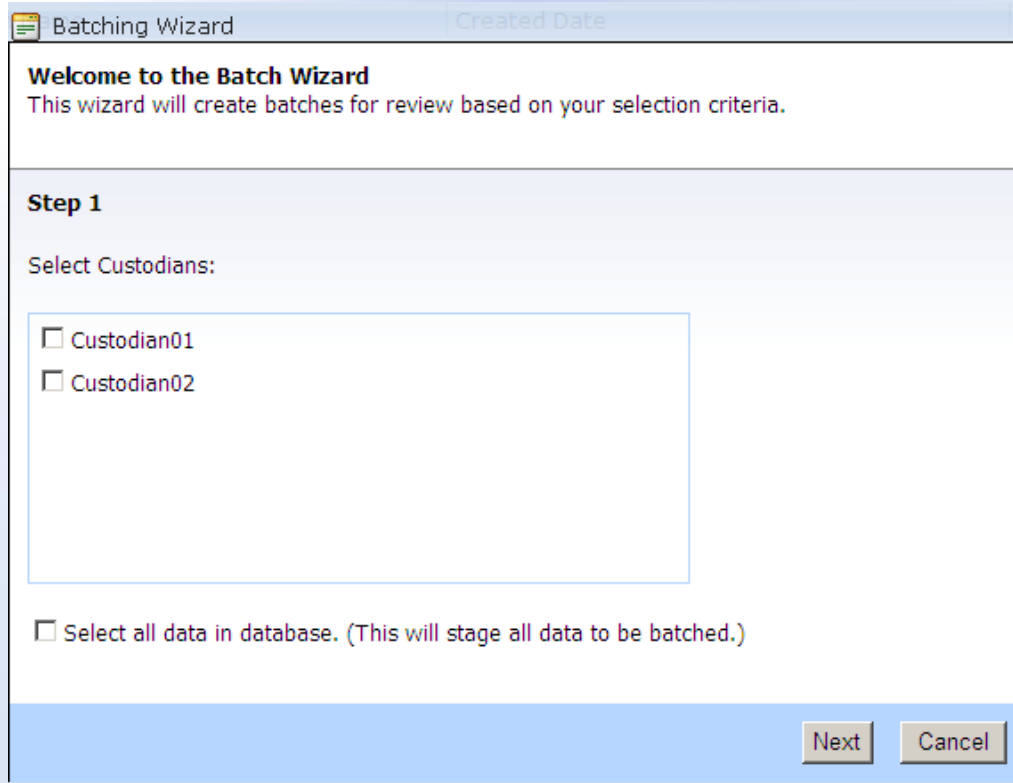


Identify Requirements

- 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



Batching Wizard

Created Date

Welcome to the Batch Wizard
This wizard will create batches for review based on your selection criteria.

Step 1

Select Custodians:

Custodian01

Custodian02

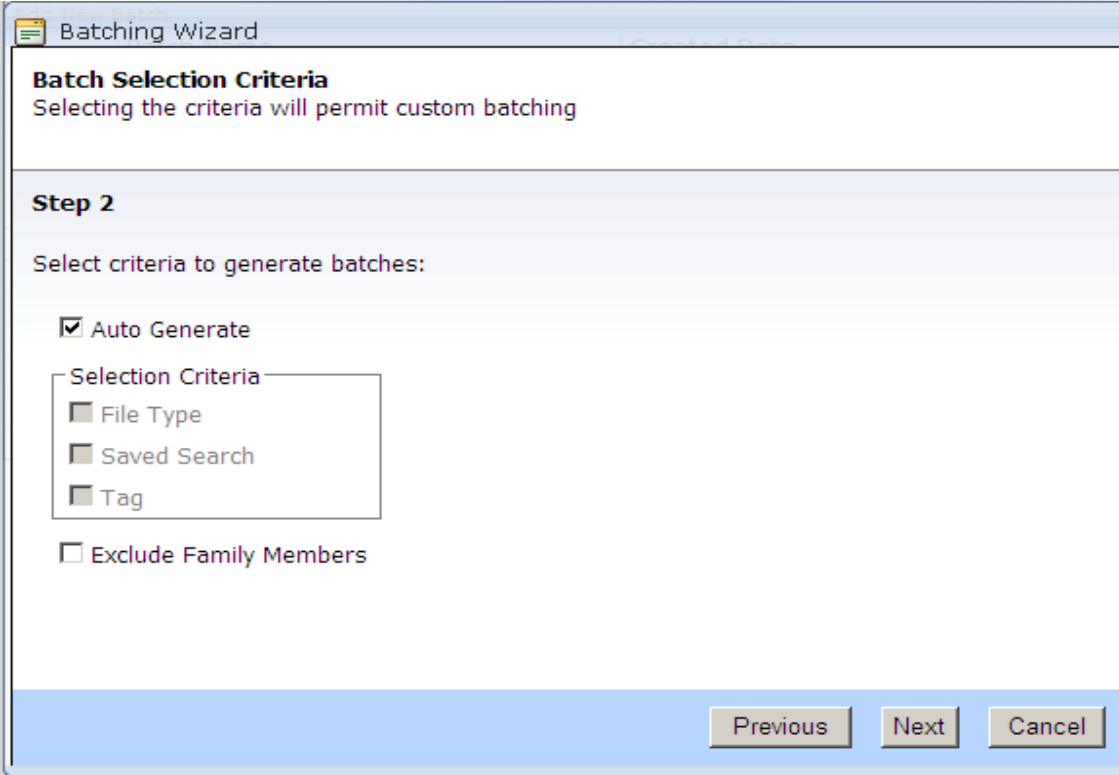
Select all data in database. (This will stage all data to be batched.)

Next Cancel



Batch Creation (cont.)

- Select filter criteria



The screenshot shows a 'Batching Wizard' dialog box with the following content:

Batching Wizard

Batch Selection Criteria
Selecting the criteria will permit custom batching

Step 2

Select criteria to generate batches:

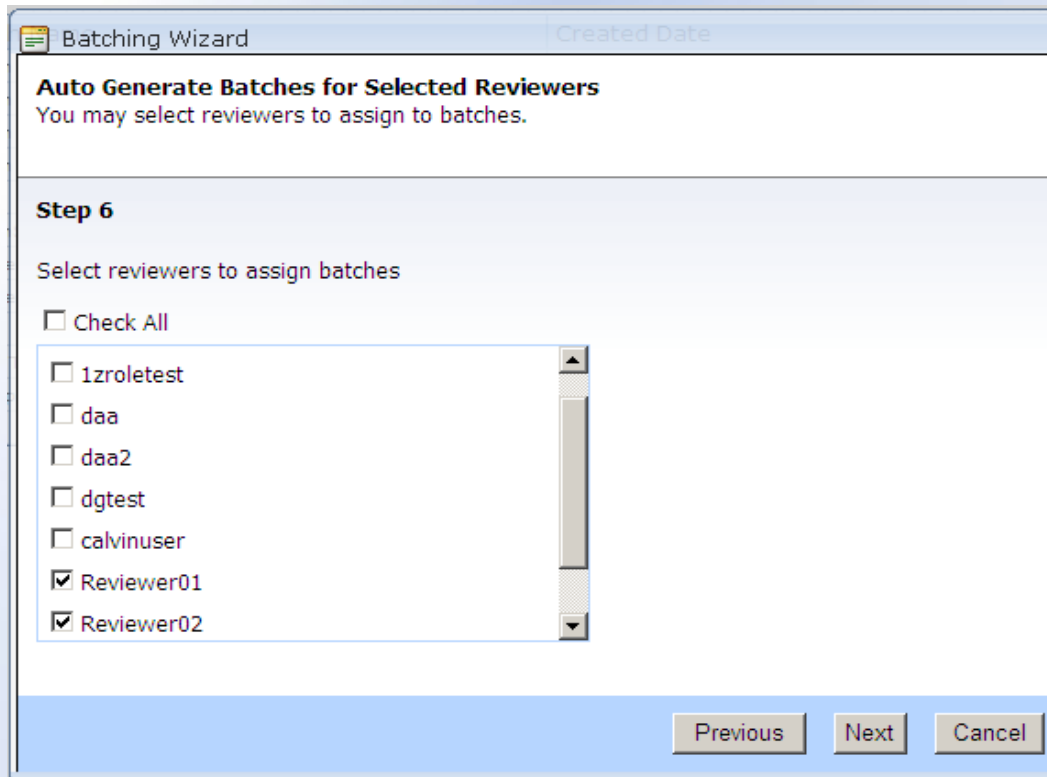
- Auto Generate
- Selection Criteria**
 - File Type
 - Saved Search
 - Tag
- Exclude Family Members

Buttons: Previous, Next, Cancel



Batch Creation (cont.)

- Select Reviewer



Batching Wizard Created Date

Auto Generate Batches for Selected Reviewers
You may select reviewers to assign to batches.

Step 6

Select reviewers to assign batches

Check All

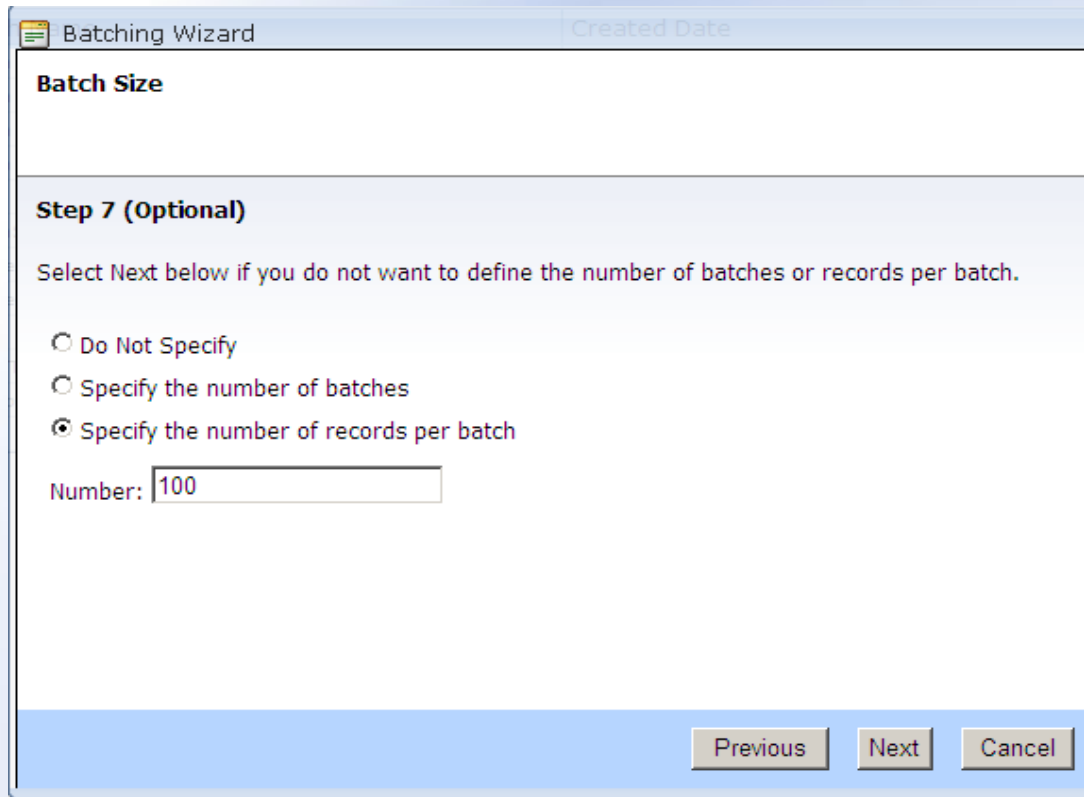
- 1zroletest
- daa
- daa2
- dgtest
- calvinuser
- Reviewer01
- Reviewer02

Previous Next Cancel



Batch Creation (cont.)

- Select Batch/Record Sizes



Batching Wizard Created Date

Batch Size

Step 7 (Optional)

Select Next below if you do not want to define the number of batches or records per batch.

Do Not Specify

Specify the number of batches

Specify the number of records per batch

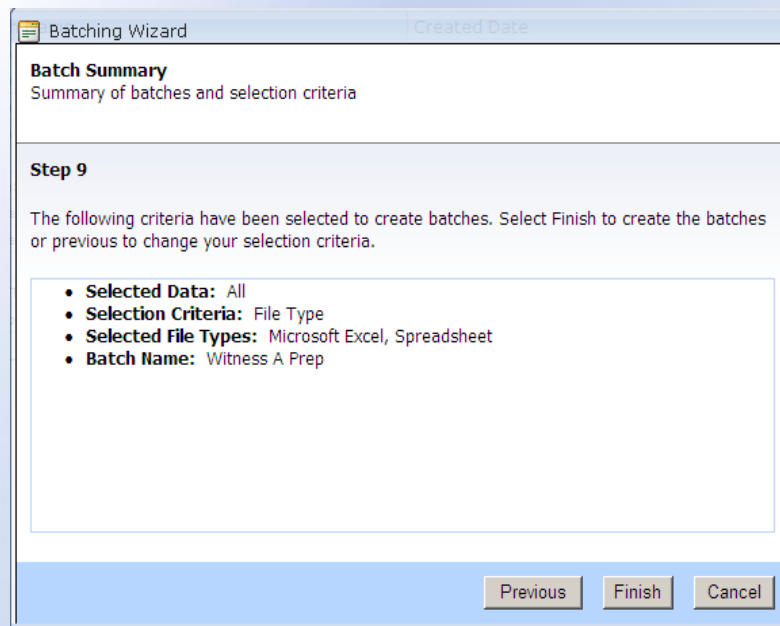
Number:

Previous Next Cancel



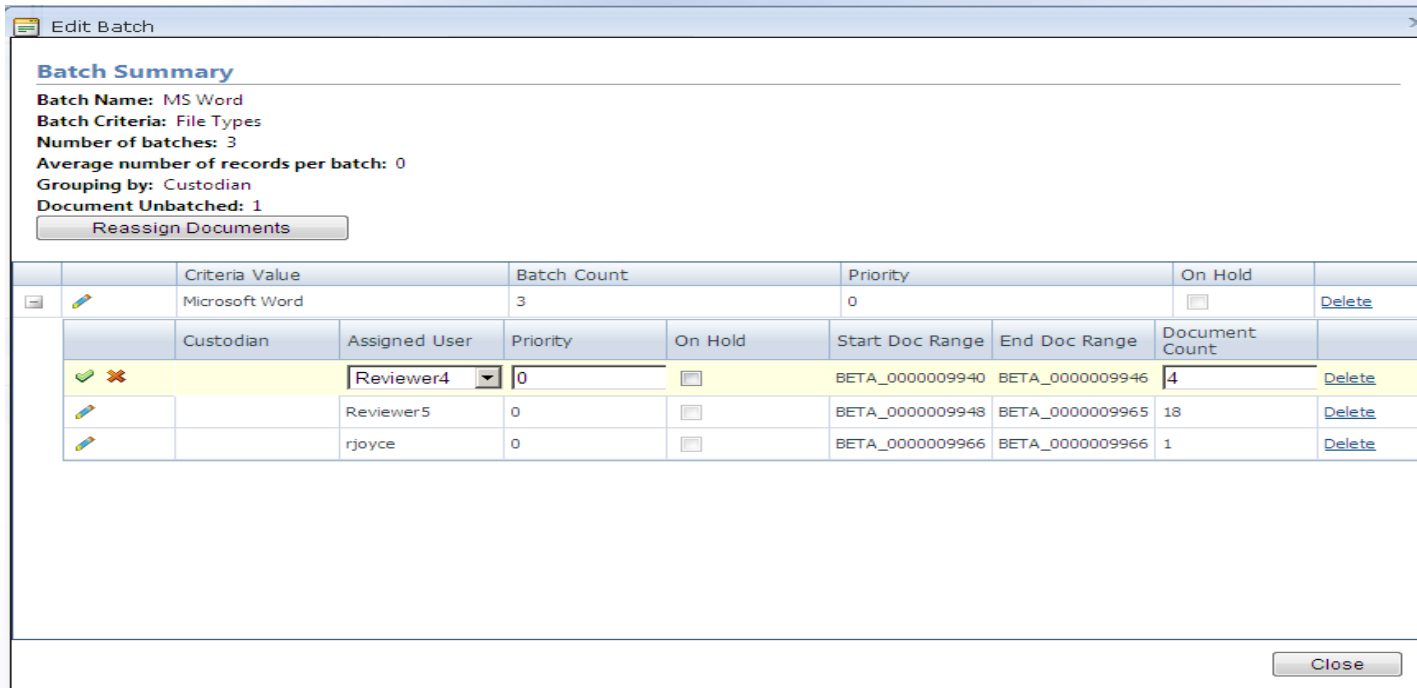
Batch Creation (cont.)

- Batch summary



Batch Edits

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







Batch Summary

Batch Name: MS Word
Batch Criteria: File Types
Number of batches: 3
Average number of records per batch: 0
Grouping by: Custodian
Document Unbatched: 1

[Reassign Documents](#)

Criteria Value	Batch Count	Priority	On Hold	
Microsoft Word	3	0	<input type="checkbox"/>	Delete

Custodian	Assigned User	Priority	On Hold	Start Doc Range	End Doc Range	Document Count	
 	Reviewer4	0	<input type="checkbox"/>	BETA_0000009940	BETA_0000009946	4	Delete
	Reviewer5	0	<input type="checkbox"/>	BETA_0000009948	BETA_0000009965	18	Delete
	rjoyce	0	<input type="checkbox"/>	BETA_0000009966	BETA_0000009966	1	Delete

[Close](#)

Batch Edits (cont.)

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

Reassign Documents

Select Reviewers:

- Reviewer4
- Reviewer5
- rjoyce
- caseadmin3
- aodintsov

Batch Size:

- Do Not Specify
- Specify the number of batches
- Specify the number of records per batch

Number:

Select criteria to group batches. Custodian is the default group that batches will be grouped by unless another criteria is selected.

- Custodian
- File Type
- Tags

Submit Close

Customize Review Workflow

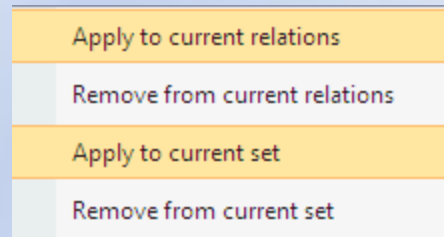
- Create Tag Group based on review methodology - apply rule & type

The screenshot displays the 'Manage Tags' application window. At the top, there are dropdown menus for 'Client' (set to 'Final Test Pass') and 'Case' (set to 'Project01'). Below these are three buttons: 'Add Group', 'Add Tag', and 'Delete'. The main area is divided into two panes. The left pane, titled 'Groups and Tags', shows a hierarchical tree structure. It includes a 'Privileged' group with sub-items 'Privilege' and 'Not Privileged', a 'New Tag Group' group, and an 'Independent Tags' group with sub-items 'Test 1', 'Test 2', and 'Test 3'. A 'NEW GROUP' is highlighted at the bottom of the tree. The right pane, titled 'Manage Group', is used for configuring the selected group. It has a 'Name' field containing 'NEW GROUP'. Below this is a 'Settings' section with two dropdown menus: 'Type' (set to 'Inclusive') and 'Rule' (set to 'Not Required'). A dropdown menu for 'Type' is open, showing 'Inclusive' and 'Exclusive' options. At the bottom of the 'Manage Group' pane are 'Save' and 'Cancel' buttons.



Applying Tags with Group Rules

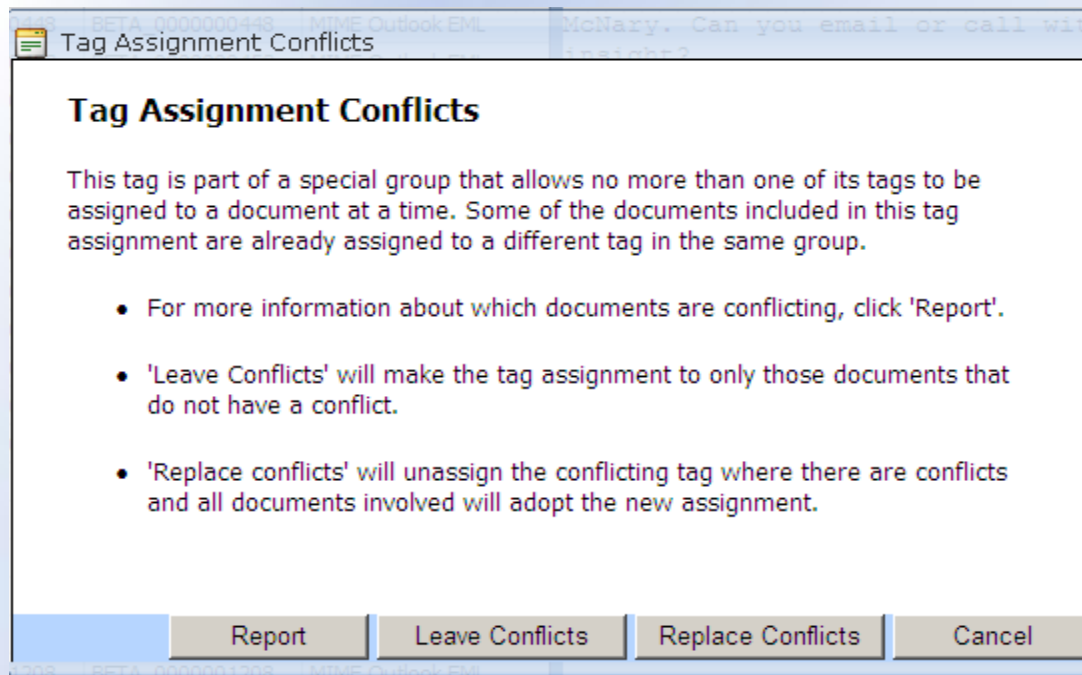
- With Group Rules, a conflict could arise for records tagged within an exclusive group.





Tag Assignment Conflicts

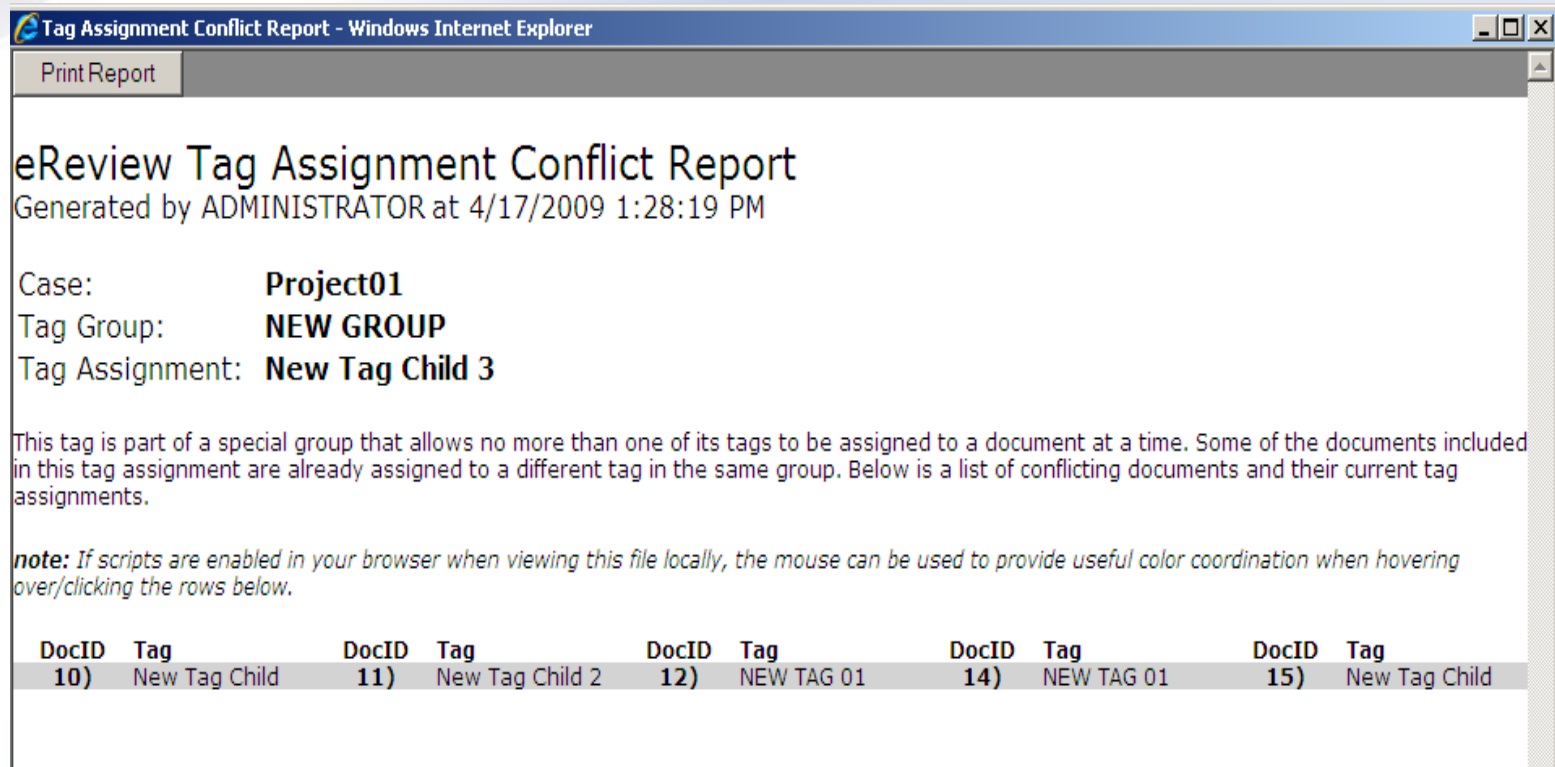
- If a tag assignment conflicts, a window appears for selection of next steps. Selecting report will provide a list of the document IDs with the conflict.



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



The screenshot shows a web browser window titled "Tag Assignment Conflict Report - Windows Internet Explorer". The page content includes a "Print Report" button, a title "eReview Tag Assignment Conflict Report", and generation information "Generated by ADMINISTRATOR at 4/17/2009 1:28:19 PM". The report details are as follows:

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

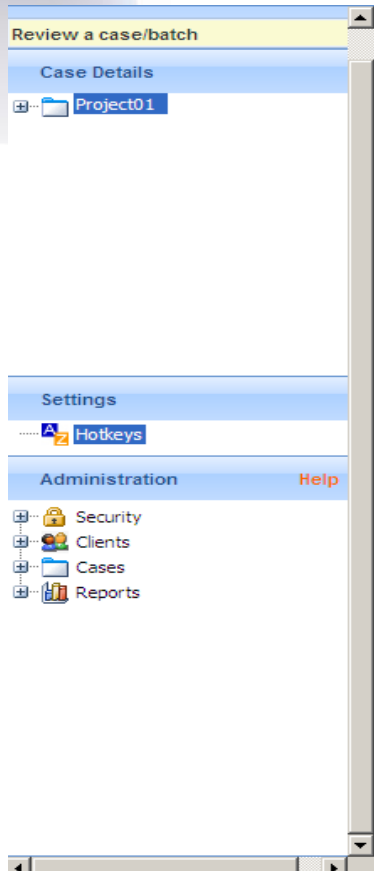
This tag is part of a special group that allows no more than one of its tags to be assigned to a document at a time. Some of the documents included in this tag assignment are already assigned to a different tag in the same group. Below is a list of conflicting documents and their current tag assignments.

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.

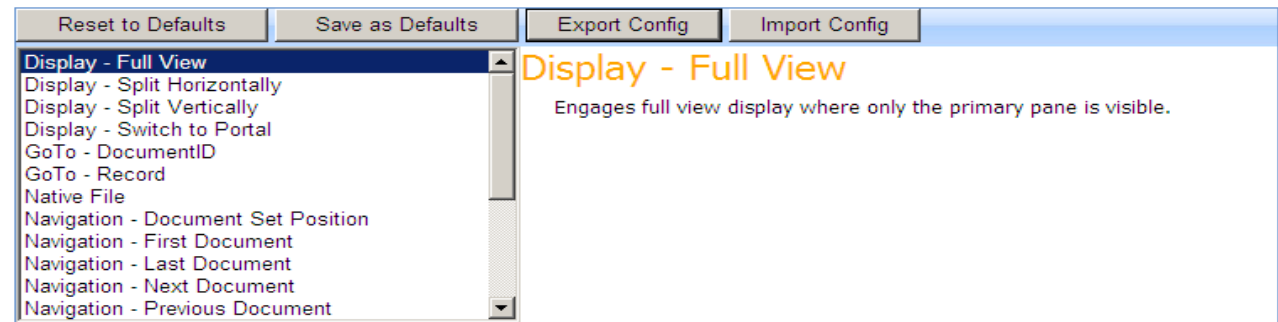
DocID	Tag	DocID	Tag	DocID	Tag	DocID	Tag	DocID	Tag
10)	New Tag Child	11)	New Tag Child 2	12)	NEW TAG 01	14)	NEW TAG 01	15)	New Tag Child

Hotkeys

- User or case level



Hotkeys are unique to each user. Selecting a hotkey from the list below will display its key combination on the virtual keyboard. To modify it, simply press and hold the first key (marked blue) followed by the second (marked orange) to lock the new key combination. Click 'Save' to permanently store it. Click 'Reset' to revert back to the last saved combination for the selected hotkey. If typing keys on your keyboard isn't referencing keys on the virtual keyboard, click the virtual keyboard with your mouse and try again.





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



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.]



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