Creating Dashboards for Your Case Lifecycle

Philadelphia – Q2 2017
How does a user group work

• You, the community, drive the user group’s topics and conversation

• kCura is here to moderate the conversation

• The more you put into the meetings the more you get out

• Surveys will go out at the end of each meeting, please fill them out!
Agenda

1. The Importance of Data Visualization
2. Introduction to Widgets and Dashboards
3. Dashboards to the Rescue
4. Workflow Scenarios
5. Q & A
The Importance of Visualizations
The Big Data Era Is Here

By IRVING WLADAWSKY-BERGER
Feb 6, 2015 11:59 am ET

Big Data belongs not only to the ongoing digital revolution, but to the scientific one as well. “Scientific revolutions are launched when new tools make possible all kinds of new measurements and observations,” CIO Journal Columnist Irving Wladawsky-Berger writes. “Our new Big Data tools now have the potential to enable information-based scientific revolution.”

For roughly a decade, businesses and governments have been collecting digital information about the world’s citizens; not just names and numbers, but loads of data, Big Data. The IDC (International Data Corporation) recently predicted that the Big Data industry will experience a 26.4% compound annual growth rate billion by 2018. What this...
Big Data - Exponential Growth

(Exabytes)
See the Story in the Data

- Looking at data directly, it's just a bunch of text and numbers
- The facts are disconnected
- Absolute numbers don't provide the complete picture
- Need to connect related data to get the full picture
- Visualizations can compress and synthesize a very large amount of data into a small space
- We are all visualizers now, people demand data visualizations
Introduction to Widgets & Dashboards
Dashboards…They are Everywhere!
Dashboards…They are Everywhere!
Dashboards to the Rescue

Workflow Scenarios
Workflows Using Data Visualization

- **Explore** – Know what’s in your data...and what’s not
- **Organize and prioritize** – Reduce clutter, focus on what’s important
- **Monitor** – Stay on track, keep moving forward
- **QC** – Move faster by getting it right the first time
- **Extend** – Use visualizations across the Relativity stack*
Explore

Know what’s in your data...and what’s not
Situation 1

You’ve just finished publishing data from Relativity Processing and want to ensure all custodians have been loaded, document counts match, and date ranges are accurate.
Situation 2

Your data is loaded and you’ve run a key term STR. You’ve been asked to provide an overview of what you have in your workspace. Good thing you created a Database stats dashboard!
Organize and Prioritize

Reduce clutter, focus on what’s important
Situation 3

You know you have password protected documents and documents with hidden data in your case. You want to identify these documents so you can batch them separately for review.
Situation 3

- Count of Max Hidden Data
  - 88.0%
  - Blank (158,310)
  - Yes (29,609)

- Count of Unprocessable
  - 100.0%
  - No (62,180)
  - Yes (0)

- Count of Track Changes
  - (Bar chart showing distribution)

- Count of Password Protected
  - 100.0%
  - Encrypted (82)
Situation 4

It’s the end of the work day and you have reviewers starting at 7 a.m. tomorrow morning. You’ve been tasked with prioritizing documents for this first wave of review and need to have the batches ready for the start of the review.
Situation 4
Situation 4 – use STRs to prioritize review

- **Count of Responsive Designation**
  - Responsive
  - Non-Responsive
  - Needs Further Review
  - Technical Issue
  - Grand Total

- **Count of Privilege**
  - Privileged
  - Not Privileged
  - Grand Total

- **Count of Issues**
<table>
<thead>
<tr>
<th>Issues</th>
<th>Grand Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Blank)</td>
<td>167.54</td>
</tr>
<tr>
<td>Misrepresentation</td>
<td>3.81</td>
</tr>
<tr>
<td>Risk Management</td>
<td>3.76</td>
</tr>
</tbody>
</table>

- **Count of STR - Key Terms**
  - STR - Key Terms
    - gaz (32,287)
    - contract (26,928)
    - energy (21,154)
    - oil (7,950)
    - ePCO (6,132)
    - audit (5,506)
    - arrangement (4,889)
    - key W2 tax (3,437)
    - arrests (985)
    - EPA (946)
    -ﻞ‌يرا (32)

- **Count of STR - Privilege Terms**
  - Top 10 STR - Privilege Terms
    - counsel (9,871)
    - privleg (7,422)
    - attorney (5,446)
    - ian.com (1,324)
    - attorney client (649)
    - velcro.com (722)
    - intel product (676)
    - weightlaw.com (194)
    - kristan.com (106)

- **Count of STR - Issue Coding**
  - Issue Coding
    - "Contract\*" (5,240)
    - trading (3,678)
    - confidence (2,746)
    - Web (2,244)
    - tech (969)
    - risk management (969)
    - risk management (762)
    - power ppc gas (690)
    - "Mr. to market\*" (48)
    - "mark-to-market" (48)
    - "tn" (48)
    - "Sell" (36)
    - "special purpose entity\*" (19)
    - "Audit committee\*" (16)
    - achieving (9)
Monitor

Stay on track, keep moving forward
Situation 5

It’s the end of the first week of review and you’ve been asked to provide feedback on the progress of the review and any potential issues that need to be addressed.
Situation 6

You’ve heard some grumbling from the review team that a certain reviewer is surfing the internet most of the day instead of actually reviewing documents. You need to quickly see that reviewer’s stats, or lack thereof, in order to address this situation.
Situation 6

Count of Reviewed By

Count of Reviewed By by Reviewed On

Count of File Extension
Situation 6
Move faster by getting it right the first time
Situation 7

The team is getting ready to create the privilege log and you need to verify that the necessary privilege coding has been completed.
Situation 7

Count of Privilege

- Privilege Count
  - Not Privileged: 27,000
  - Privileged: 10,000

Count of Privilege Designation

<table>
<thead>
<tr>
<th>Privilege Designation</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blank</td>
<td>181,773</td>
</tr>
<tr>
<td>Attorney Work Product</td>
<td>449</td>
</tr>
<tr>
<td>Attorney Client</td>
<td>28</td>
</tr>
<tr>
<td>Communication</td>
<td></td>
</tr>
<tr>
<td>Grand Total</td>
<td>182,259</td>
</tr>
</tbody>
</table>

Count of STR - Privilege Terms

Top 10 STR - Privilege Terms:
- counsel (8,971)
- privilege* (7,422)
- attorney (5,450)
- *fan.com (1,324)
- attorney client (949)
- vslaw.com (722)
- vslaw.com (722)
- work product (676)
- wrightlaw.com (104)
- *kslaw.com (100)

Count of Custodian

- Custodian Count
  - ENRON: 45,000
  - SALK: 40,000
  - NARVAEZ: 35,000
  - LIN: 30,000
  - TAYLOR: 25,000
  - GARTNER: 20,000
  - GAMS: 15,000
  - SANDERS: 10,000
  - KAMINSKI: 5,000
  - VASCON: 0
Situation 8

It’s production time! You have a production due in a few days and you need to identify any conflicts or work that needs to be done before you can start the production.
Situation 9

Whew! You’ve completed that rush production and it was delivered to opposing counsel. But today you’re told by the attorney that redactions were made after you sent out the production which may have included natives for the redacted documents.
Situation 9
Search Condition: Primary Markup Set = Redacted
But wait, there’s more!

You can do even more with dashboards. You can dive into the results of your structured analytics operations such as email threading and language identification.
But wait, there’s more!
Language Identification
Extend

Use visualizations across the Relativity stack
Dashboards Are Not Just for Documents

• Default dashboards for ECA, Legal Hold, Assisted Review Overturns, and Data Grid for Audit
• Get creative and create dashboards for custom objects
• There are seemingly endless possibilities for incorporating dashboards into your Relativity case
Wrap-up

- Data visualizations help you work better, faster, smarter
- Experiment and start integrating visualizations into your next project
- Have fun with it!
Resources

Recipe: Create Commonly Used Dashboards in Relativity
help.kcura.com/9.4/Content/Recipes/DataVisualization_and_Analysis/Creating_commonly_used_dashboards_in_Relativity.htm

Dashboards and Visualization Training
kcura.com/relativity/resources/training

Relativity Documentation
help.kcura.com

Dashboards and Visualization Workflow Support
solutions@kcura.com

Dashboards and Visualization Technical Support
support@kcura.com
Questions?
Thank you for attending!