



Relativity Training Menu

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1 Relativity Training Options

kCura suggests that all new employees working with Relativity receive formal training, either by our training department or internally. This ensures an easy transition for each user and those who support them.

We offer three standard training classes to help users excel in their use of Relativity:

- End User Training
- Administrative Training
- Infrastructure Training

These predefined sessions are detailed below. Contact training@kcura.com if you'd like to develop a custom agenda for your team.

Any pricing listed is for one trainer covering the predefined agendas. If additional trainers or specialized agendas are requested, a separate quote will be issued.

2 Relativity End User Training

Standard end user training is an hour long class to familiarize reviewers with basic Relativity functionality.

2.1 Course Basics

Audience: Attorneys and paralegals

Course Length: 1 hour

Course Objectives: Upon completion of this course, attendees will be familiar with:

- Document list navigation
- Sorting
- Filtering
- Basic searching
- Coding/tagging
- Redacting/annotating
- Mass Operations

2.2 How to Attend

You can attend in two ways:

- Free weekly webinars
- Closed enrollment webinars

2.2.1 Free Weekly Webinar

Who:

- Any Relativity users who would like to join
- See www.kcura.com/training for the schedule

Where: Web session

When: Every Friday

How Much: Free!

2.2.2 Closed Enrolment Webinar

Who: Only your team

Where: Online

When:

- A date and time agreed upon by kCura and your team



All dates and times may not be available. Sessions are booked on a first come, first served basis.

How Much:

- \$250 per hour



A \$225 consulting charge will be added if the training is to be performed in the client's data. This one hour of consulting time will allow the trainer to test the provided login, become familiar with the case setup, and find good examples within the new data.

3 Relativity Administrative Training

Administrative training is a two-day, hands-on, in-person class that teaches attendees to manage Relativity cases.

3.1 Course Basics

Audience: Litigation Support and Project Management staff

Course Length: 2 days

Course Overview:

- Administrative training walks an attendee through the entire Relativity case lifecycle.

- Each attendee will start with an empty case. They will create fields, load data, establish workflow rules, report on their data, run productions, and export the data.

Agenda: See Appendix A of this document.

3.2 How to Attend

Administrative Training can be attended two ways:

- Open enrollment – Chicago
- Closed enrollment – Chicago

3.2.1 Open Enrollment – Chicago

Who: The first 10 people to reserve a spot

Where: kCura's Chicago office

When:

- The first three weeks of every month
- See www.kcura.com/training for the schedule

How much:

- \$1,000 per attendee
- No minimum number of attendees

3.2.2 Closed Enrollment – Chicago

Who: Your team, up to 10 attendees

Where: kCura's Chicago office

When:

- Two days agreed upon by kCura and your team
- 2 week notice is required
- All dates may not be available
- Sessions are booked on a first come, first served basis

How much:

- \$1,000 per attendee
- 3 attendee minimum



A 50% cancellation fee will apply to classes cancelled less than 10 business days from the start of the session.

4 Relativity Infrastructure Training

Relativity Infrastructure Training walks attendees through the details of the Relativity environment and databases.

4.1 Course Basics

Audience: IT professionals responsible for maintaining servers and SQL environments.

Course Length: One day

Course Topics: Covered in Appendix B of this document.

4.2 How to Attend

Infrastructure training can be scheduled in two ways:

- Closed enrollment – Chicago
- Closed enrollment – Webinar

4.2.1 Open Enrolment – Chicago

Who: The first 10 people to reserve a spot

Where: kCura's Chicago office

When:

- See www.kcura.com/training for the schedule

How much:

- \$500 per attendee
- No minimum number of attendees

4.2.2 Closed Enrolment – Chicago

Who: Your team

Where: kCura's Chicago office

When:

- Two days agreed upon by kCura and your team
- 2 week notice is required
- All dates may not be available
- Sessions are booked on a first come, first served basis

How much:

- \$500 per attendee
- 3 attendee minimum



A 50% cancellation fee will apply to classes cancelled less than 10 business days from the start of the session.

4.2.3 Web Training

Who: Your team

Where: web session

When:

- A date and time agreed upon by kCura and your team
- All dates may not be available
- Sessions are booked on a first come, first served basis

How much: \$250 per hour

5 Appendix A – Administrative Training Agenda

Note that this agenda represents general guidelines, and is subject to change.

Day One	
Time	Topic
9:00 am – 10:30	Relativity Overview
10:30 – 10:45	Break
10:45 – 11:30	Organizing Pre-Case objects: <ul style="list-style-type: none"> ▪ Clients and matters ▪ Users and groups
11:30 – 12:00 pm	Case creation
12:00 – 1:00	Lunch
1:00 – 1:45	Importing: <ul style="list-style-type: none"> ▪ What can you import? ▪ Importing methods
1:45 – 2:30	Field creation <ul style="list-style-type: none"> ▪ Field Types ▪ Best practices ▪ Special field properties
2:30 – 3:00	Import completion and Mass operations
3:00 – 3:15	Break
3:15 – 4:15	Creating a review interface: <ul style="list-style-type: none"> ▪ Creating coding fields ▪ Building intuitive layouts
4:15 – 4:30	Coding documents
4:30 – 4:45	Summary Reports
4:45 – 5:00	Customer Support / Portal
Day Two	
9:00 am – 10:30	Document Views <ul style="list-style-type: none"> ▪ Using views to drive workflow ▪ Using views to drive reporting Other views <ul style="list-style-type: none"> ▪ Non-document views ▪ System document views
10:30 – 10:45	Break
10:45 – 11:15	Overlay loads
11:15 – 11:45	Relational fields and propagation
11:45 – 12:45pm	Lunch
12:45 – 1:30	Productions
1:30 – 2:00	Exporting
2:00 – 2:15	Break
2:15 – 3:00	Security <ul style="list-style-type: none"> ▪ Object level ▪ Item level ▪ Security vs. Visibility
3:00 – 3:30	Index Creation

	<ul style="list-style-type: none"> ▪ dtSearch ▪ Analytics
3:30 – 4:00	Filtering & Searching
3:30 – 4:15	Workflow <ul style="list-style-type: none"> ▪ Document assignment ▪ Batching
4:15 – 5:00	Exercise – putting the pieces together

Table 5-1: Administrative Training Agenda

6 Appendix B – Infrastructure Training Agenda

Note that this agenda represents general guidelines, and is subject to change.

Time	Topic
10:00 am – 11:00	Back End architecture – Understanding Relativity components <ul style="list-style-type: none"> ▪ Distributable architecture ▪ Server Roles <ul style="list-style-type: none"> ○ Agents ○ WebAPI ○ Distributed ○ SQL ○ File Shares ○ Index Repository ▪ Network Communication ▪ Load Balancing ▪ Storage options and considerations ▪ Mixed mode configuration (SSL, Citrix)
11:00 – 12:00 pm	SQL Server configuration and optimization <ul style="list-style-type: none"> ▪ Temp DB ▪ Locking pages in memory ▪ Disk allocation ▪ Disk defragmentation ▪ Database indexes ▪ Distributed servers
12:00 pm – 1:00	Lunch
1:00 – 1:30	Maintenance – keeping the system running smoothly <ul style="list-style-type: none"> ▪ Backups ▪ Log truncation ▪ Maintenance plans ▪ Disk management ▪ Disk integrity ▪ Clustering
1:30 – 3:30	Relativity databases <ul style="list-style-type: none"> ▪ EDDS and Case: database use and relationship ▪ Artifact model ▪ Document table (data formatting and location) ▪ File table (file mapping and associations) ▪ Field and data types ▪ Auditing

	<ul style="list-style-type: none"> ▪ Configuration table ▪ Analytics tables ▪ Security
3:30 – 3:45	Optimizing imports and exports <ul style="list-style-type: none"> ▪ BCP path ▪ Desktop client ▪ Permissions and loading modes (Web, Direct, Bulk)
3:45 – 4:00	Relativity Agents <ul style="list-style-type: none"> ▪ Roles ▪ Troubleshooting
4:00 – 4:15	Relativity Analytics indexes <ul style="list-style-type: none"> ▪ Best practices ▪ Maintaining ▪ Troubleshooting
4:15 – 4:45	Custom tools – extending Relativity’s functionality to meet your business needs <ul style="list-style-type: none"> ▪ Syncs and triggers to implement business logic. ▪ Tabs for external links and reporting ▪ Script kit for non-history tab reporting and user statistics ▪ Custom controls: buttons and iFrames.

Table 6-1: Infrastructure Training Agenda

7 Disclaimer

This documentation is proprietary information of kCura Corporation and may be modified, altered, or repurposed only in accordance with written consent from kCura.

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