



Hands-on Project A

1 Before you begin

Please read the scenario and requirements in full before you begin. Note they are not in any sequential order. Using best practices, perform the tasks in the most efficient way in order to produce the required results.

You have 60 minutes to complete this exercise. Each task within the scenario is worth a set number of points.

2 Scenario

The case has been created and the data is now ready for loading. In this exercise you will load the supplied data and complete the work request below. You will create new fields, keyboard shortcuts, a user and group, OCR, replace fields, code documents, search on specific terms, pivot and report. For this exercise you will use the existing “Case X” workspace.

3 Requirements

- Open **Case X** and load the provided data using the Relativity Desktop Client.
 - Testdata.dat
 - Create any required fields (use 5 different field types)
 - Fix any errors
- Create relational fields for duplicates and family.
- Create a Search Terms Report for the following terms. Ensure terms are available in the field tree.
 - Power, Gas, Life w/2 Date
- OCR documents that do not have Extracted Text and write results to an OCR field. Copy the newly created text data from the OCR field to the Extracted Text field.
- Create a new layout to be used for coding documents.
 - Name: Attorney Coding
 - Fields: Issue and Designation
 - Read only fields: Control Number, Custodian
 - Comments box with 5 rows of text
- Create a user who only has permissions to see the “Hot” documents and mass tag.
 - Name: Mike Smith
 - Email: msmith@law.com
 - Password: Password1!
- Login as msmith@law.com and change the Issues value on the first 5 documents to “OLD HOT.”
- Create keyboard shortcuts for designation values; Responsive (Alt + R) and Not Responsive (Ctrl + N)
- Create a bar chart displaying issues per custodian and save the image to the desktop as “Issues Chart”.



Hands-on Project B

1 Before you begin

Please read the scenario and requirements in full before you begin. Note they are not in any sequential order. Using best practices, perform the tasks in the most efficient way in order to produce the required results.

You have 60 minutes to complete this exercise. Each task within the scenario is worth a set number of points.

2 Scenario

The vendor did not include family or duplicate information in the original load files. In this project you will use the existing “Case X” workspace to overlay the provided data and code the required documents using the most efficient, accelerated review process. You will also create a group, users, batches, a view, and summary report.

3 Requirements

- Open “Case X” and overlay the provided files using the Relativity Desktop Client.
 - Overlay.dat
 - Fix any errors
- Create a Designation field that has propagation set for duplicates and family groups.
- Ensure reviewers can use the “Copy from Previous” functionality when assigning the document Designation.
- Create a user and add him to the existing “Case X - First Level Reviewer” group. Note that this group does not have rights to Mass Edit but needs to utilize the skip functionality.
 - Name: Paul Watts
 - Email: pwatts@law.com
 - Password: Password1!
- Login as Paul Watts and code all documents that contain the word “Alternative” as Responsive.
- Create a “Second Level Reviewer” who has access to work with batches, mass edit and create reports.
 - Name: Mary Walker
 - Email: mwalker@law.com
 - Password: Password1!
- Auto-batch all Responsive documents with the prefix SLR.
- Assign Mary a batch and ensure she can only see the following:
 - My Assigned Unreviewed
 - My Assigned Reviewed
- Create a summary report of the Designations for each custodian in order for a supervisor to monitor.



Hands-on Project C

1 Before you begin

Please read the scenario and requirements in full before you begin. Note they are not in any sequential order. Using best practices, perform the tasks in the most efficient way in order to produce the required results.

You have 60 minutes to complete this exercise. Each task within the scenario is worth a set number of points.

2 Scenario

The review is almost complete and we have a production deadline. In this project you will search for key terms for the lead attorney, create persistent highlights, mass tag, apply redactions, create a user, run a privilege screening, then prepare the required documents by producing them for the Expert to review. You will use the existing “**Case X**” workspace.

3 Requirements

- Using a view, allow the lead attorney to see only documents that returned these terms in a Search Terms Report:
 - fees
 - crude
 - copper
- Create Persistent highlights on the terms above.
- Apply the redaction, “Attorney’s Eyes Only” to the Responsive emails that contain tables of numbers.
- Create an Image Set for the documents that have been tagged as Responsive.
- Create a user login for Bill, the Expert Witness.
 - Name: Bill Lake
 - Email: blake@law.com
 - Password: Password1!
- Create a saved search to find any coding conflicts and do not produce. Use this search as the production restriction. Note conflicts can be Privilege, Non Responsive or coding conflicts among family.
- Create a Production of the “Responsive” records with images for all files except Excel.
 - Make the Bates prefix KC3
 - Use six digits and start numbering at 301 and add to right footer
 - Produce the Excel as a native but include a slip-sheet
- Export Single page TIFF’s for Expert Witness
- Load the produced images (not the natives) in to a new folder. Provide access in the most secure way ensuring that the Expert Witness can only see the produced documents.



Hands-on Project D

1 Before you begin

Please read the scenario and requirements in full before you begin. Note they are not in any sequential order. Using best practices, perform the tasks in the most efficient way in order to produce the required results.

You have 60 minutes to complete this exercise. Each task within the scenario is worth a set number of points.

2 Scenario

The vendor has provided the case data along with additional workflow and user requests. In this project you will load the new data, create new fields, create a user and group, search key terms, mass tag and auto-batch. You will use the existing "Case X" workspace for this exercise.

3 Requirements

- Open "Case X" and load the provided files using the Relativity Desktop Client.
 - KCURA001.dat
 - Create any required fields (use 5 different field types)
 - Fix any errors

- Create a new layout for the Level 2 review team.
 - Name: Privileged Review
 - Read Only Fields: Control Number, Custodian
 - Fields: Issues
 - Include a Reviewer comments box with at least 5 rows

- Create a Search Terms Report on the below Attorney names. Run on all loaded data.
 - Michelle Lokay
 - Savita w/2 Puthigai

- Edit the documents containing the specified attorneys' names by tagging them with a new Issue called "Potentially Privileged."

- Create a new group called "Level 3 Reviewer" and add the user below:
 - Name: Paul Smith
 - Email: psmith@law.com
 - Password: Password1!
 - Required Permissions:
 - Code documents / Checkout Batches / Mass Edit
 - Search / Export data from Views / Mass Replace / Report / Run Scripts

- Auto-batch the Potentially Privileged documents for Level 2 Reviewers and create a view so they can see only their checked-out documents.
 - Batch by custodian in sets of 20
 - Ensure all documents are batched



Hands-on Project E

1 Before you begin

Please read the scenario and requirements in full before you begin. Note they are not in any sequential order. Using best practices, perform the tasks in the most efficient way in order to produce the required results.

You have 60 minutes to complete this exercise. Each task within the scenario is worth a set number of points.

2 Scenario

In this exercise you will use the data provided to create new settings that allow for the requirements of the production. You will load the required data, edit, create and assign batches, code, and prepare for production. You will use the existing “Case X” workspace.

3 Requirements

- Open “Case X” and load the provided files using the Relativity Desktop Client.
 - ImportData.dat
- Using a Transform Set, run domain parsing on the documents to identify the domain of the sender.
- Assign the following domains to the first level reviewers in batches of fifty (50):
 - Mail.southwest.com / Etrade.omm.com / Travelocity.com
- Edit all the Enron domain documents, coding the Issues field as “Hot.”
- Create a first level reviewer who only requires access to code documents and manage her assigned batches.
 - Name: Meg Jones
 - Email: mjones@law.com
 - Password: Password1!
- Assign Meg Jones a batch; ensure she has no access to any documents outside the batch.
- Auto- batch documents where the Issues field is set to “Hot.” Use the prefix SLR.
- Image the first 10 documents in the batch and tag them as “Responsive.”
- Create a production set in preparation for production to Opposing Counsel.
 - Bates numbering Enron000001
 - Right footer Bates number
 - Left footer “Confidential”