

Relativity Case Study #1 – Persistent Highlighting and Views

Case overview – The client had a 2.5 million document collection relating to an anti-trust case. With tight production deadlines, the client knew it wasn't reasonable to inspect every document prior to production.

Case strategy – The client's plan was to focus their review on documents containing specific terms that defined non-disclosure agreements, potentially privileged documents or documents that had information classified as potentially "private". All other documents would be produced directly, after a QC sampling process by the review team.

Relativity Implementation – Searches were run for the NDA, privilege and privacy terms. Documents that had hits were tagged for each type of hit. "Views" were constructed that presented reviewers only documents marked as containing NDA, privilege or privacy terms. Each category of terms was persistently highlighted in the document's text in a different color. As reviewers opened each document, they could quickly scan to the term and make a determination. The visual prompt by color allowed documents to be reviewed for multiple criteria at once.

Reviewers combined Views with custodian folders in the Folder Browser to work through each custodian, seeing only documents pertinent to their review task. This combination made it easy to manage the review team and their workflow.

The screenshot shows the Relativity software interface for the case "Salt vs Pepper - SF Legal". The interface includes a folder browser on the left, a search bar, and a document list table. Annotations highlight key features:

- Reviewers selected a custodian to review from the folder list.** (Points to the "Allen, Paul" folder in the Custodians list.)
- Potentially Privileged documents selected via a "View"** (Points to the "Ready for Priv. Review" filter dropdown.)
- Reviewers only saw documents containing potentially privileged terms.** (Points to the document list table.)

	Control Number	Custodian
1	EN000003	Allen, Paul
2	EN000005	Allen, Paul
3	EN000006	Allen, Paul
4	EN000007	Allen, Paul

End Result – The case team reviewed approximately 200,000 records out of the database. As they reviewed each document, they knew exactly why the document was presented to them. Additionally, they were able, via Views, to focus their review on the most important custodians first.

By devising a strategy that focused their review on only the documents that mattered, they were able to reduce their review load to 10% of the entire collection, greatly reducing the time and cost required for review.