User Guide

v2.2 (revised September 4, 2023)

Milyli Inc.
415 N Sangamon St. Chicago, IL 60642
support@milyli.com
312.265.0136
milyli.com/Chronicle

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What's new in Chronicle 2.2

We are excited to announce the release of Chronicle 2.2! Featuring guided normalization for efficient review and normalization of extensive data sets, auto-detect delimiters options, delete all normalized names, enhanced privilege log comparators for dynamic column creation, and custom multi-value delimiters.

New Features

Guided Normalization

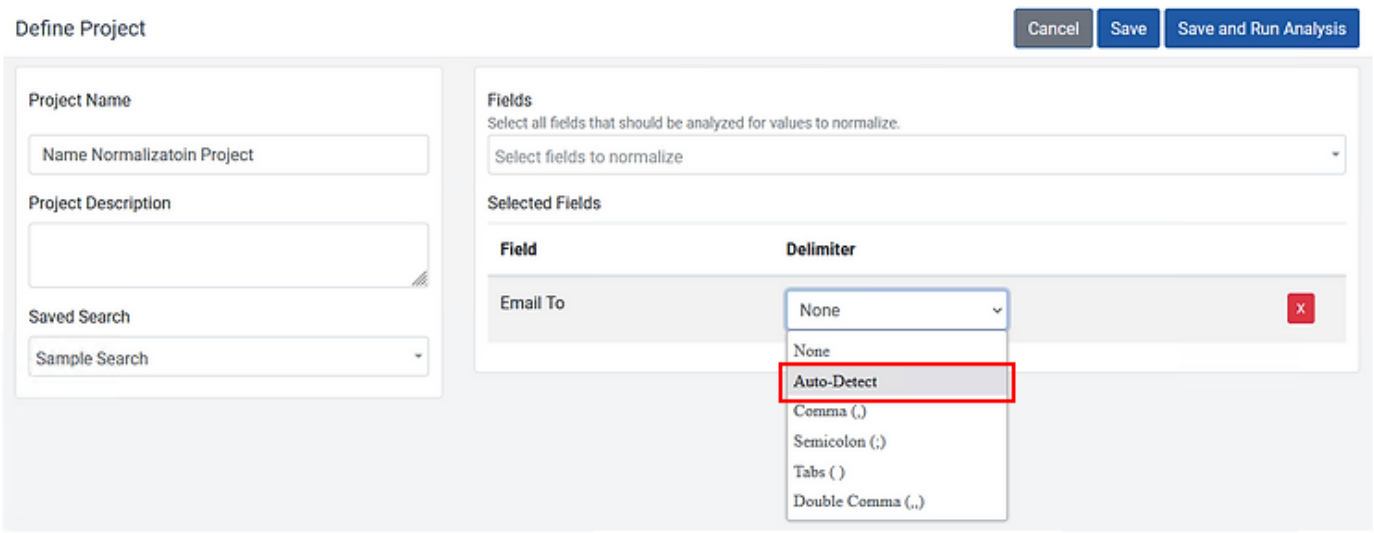
Guided Normalization is a new approach that a team may use for reviewing and normalizing large groups of original values simultaneously! After running the Name Normalization analysis, the user will be immediately taken to the guided normalization page. The most often occurring name extracted from the project's fields will be displayed with all suggested similar names!

To make the experience as easy to use as possible, many different actions are available to simplify normalization, including:

- Filtering and specifying similar names for normalization.
- Accessing helpful suggestions for the normalized name.
- Adjusting suggestion accuracy in real-time.
- Skipping names as needed.

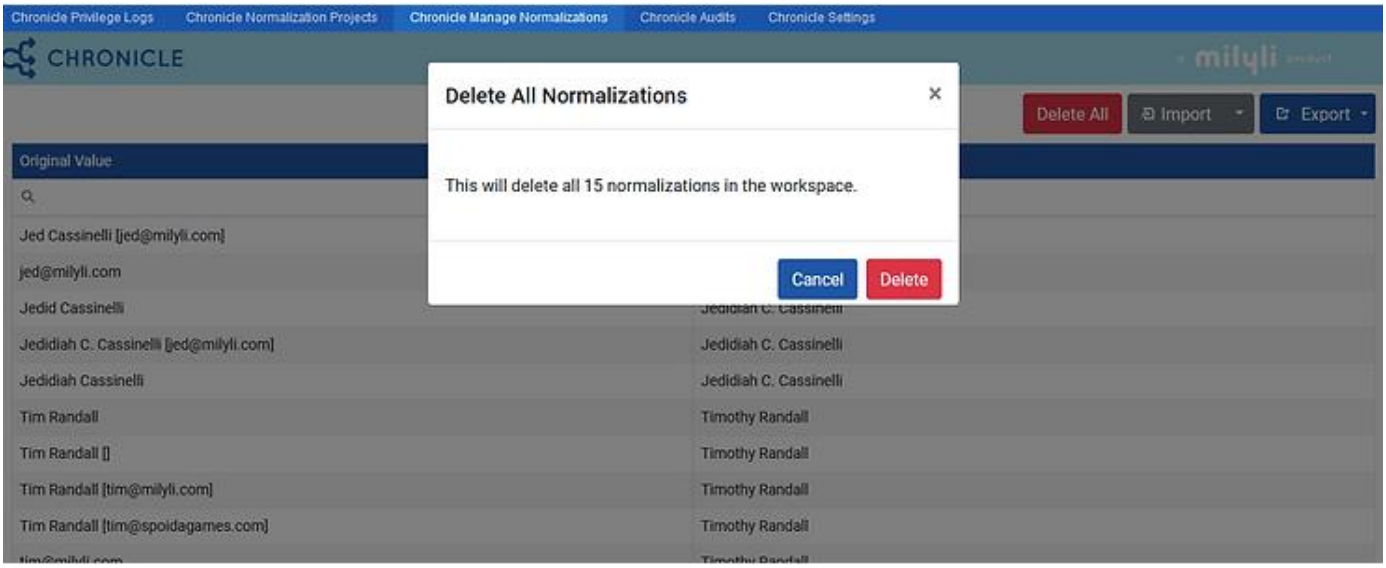
Auto-Detect Delimiters

When designating fields for name normalization, users now have the option to activate automated delimiter detection. This feature empowers Chronicle to automatically identify the delimiter within field values, even if multiple delimiters are present.



Delete All Normalized Names

The Manage Normalizations tab has been updated with a tool for deleting all normalized names in a workspace. This tool removes all normalized names and the mappings between original values across the entire workspace, regardless of the number of projects.

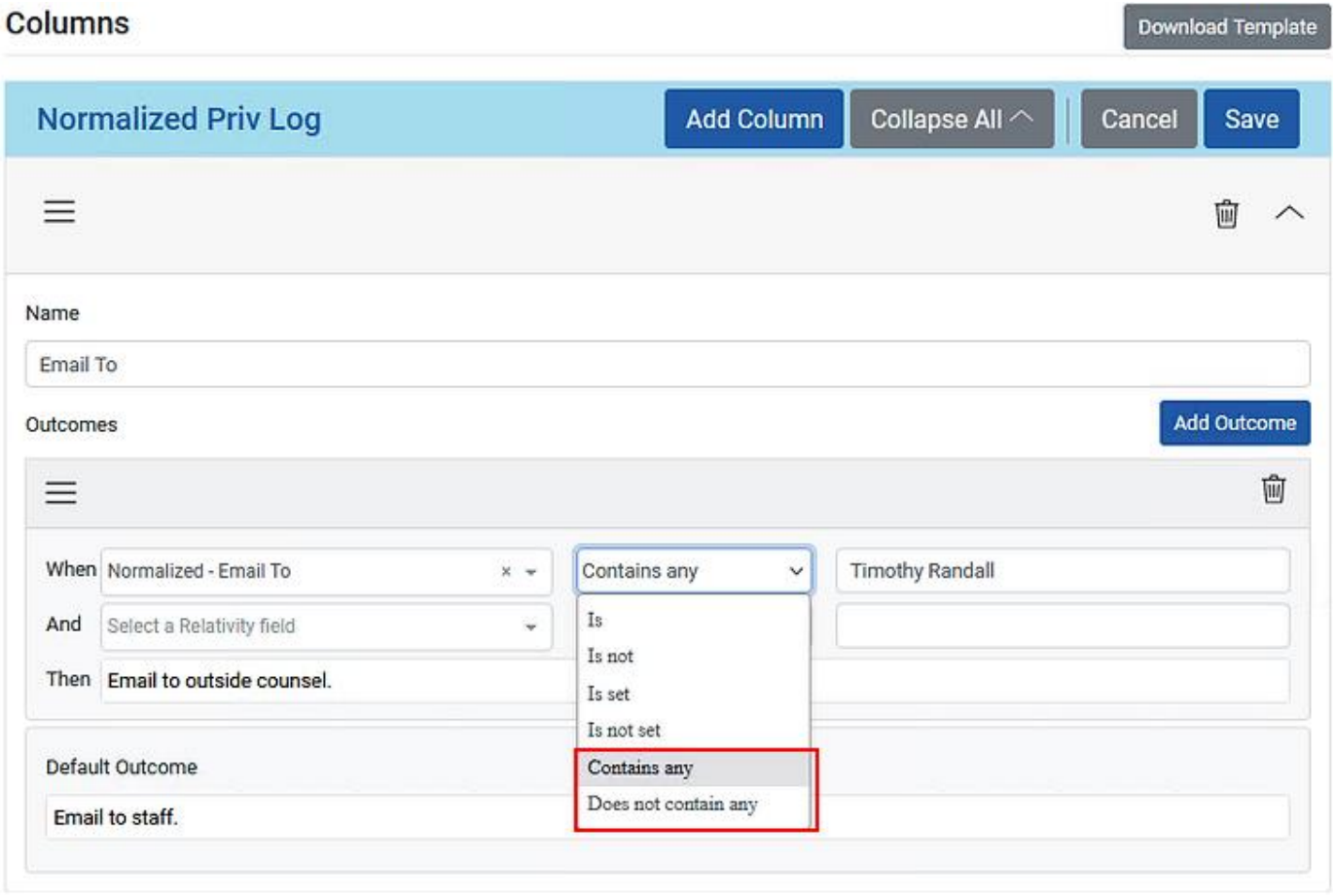


New Privilege Log Comparators

The Privilege Log template has been updated with two new comparators, Contains Any and Doesn't Contain Any, enabling the creation of dynamic, modular columns. These new comparators allow for partially matching information within text fields, partial coding, or specific objects in object fields.

The new comparators can be used to make comparisons against the following field types:

- Fixed-length text
- Long text
- Single choice
- Multiple choice
- Single object
- Multiple object

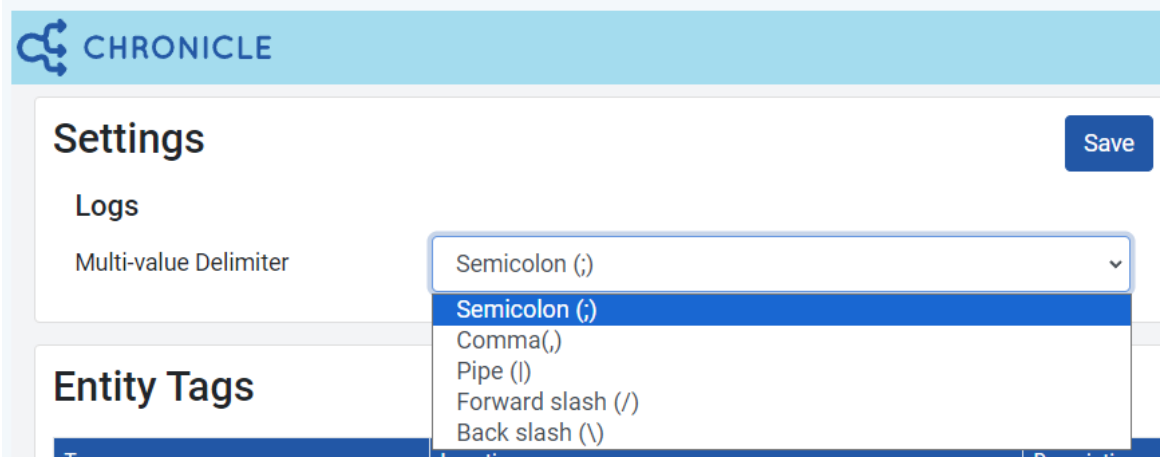


Custom Multi-Value Delimiter

A new option has been added to the Chronicle settings tab to customize the delimiter between each value when displaying a multiple-choice or multiple-object field in a privilege log.

Users can choose between the following options:

- Semicolon
- Comma
- Pipe
- Forward slash
- Backslash



Improved Privilege Log Filtering

Privilege log filtering has been expanded to include options for filtering on multiple-choice, single-object, and multiple-object fields.

Bug fixes

- Fixed an issue preventing writing values to a normalized field if a source field is a reflected field.
- Fixed an issue that occasionally resulted in import failure when importing name normalization mappings via the manage normalizations tab.
- Fixed an issue preventing users from filtering original values on the count column.
- Entity tags now properly support tagging when the target text contains parentheses.
- Fixed an issue preventing field names from containing asterisks.
- Fixed an issue when using a privilege log filter condition “Is any of” only showing blank options to filter on.

What’s changed in the user guide

Chronicle Guided Normalizations

- Added new section for Chronicle Guided Normalizations

Chronicle Settings Tab

- Added new section for Chronicle settings tab
- Added info on Custom Multi-Value Delimiter

Creating Logs

- Updated table in Creating Logs for new comparators

Creating a Name Normalization Project

- Updated table for delimiter options to include Auto-Detect delimiters

Managing Normalizations

- Updated screenshots and added bullet point for new Delete All button

Installing Chronicle

System requirements

- Relativity 10.3 and newer
- All browsers supported by Relativity 10.3 and newer are supported

Installing Chronicle

Before you begin

1. Contact support@milyli.com to get access to download the Chronicle RAP from our secure file sharing platform.
2. Chronicle must be installed through the **Relativity Application Library.**

Installation

1. Log in as a Relativity Administrator.
2. Navigate to the **'Relativity Application Library'** admin tab.
3. Click **'Upload Application'.**
4. Click the **'Choose File'** button.
5. In the dialog box, navigate to and select the Chronicle RAP file shared from Milyli.
6. After successfully uploading, click the **'Install'** button next to Workspaces Installed to push the application to any workspace that Chronicle will be utilized on.

Licensing

1. Log in as a Relativity Administrator.
2. On the admin tabs, navigate to the **Chronicle > License** admin tab.
3. Click on the **'Generate License Request'** button.
4. Copy the Chronicle License Request and email it to support@milyli.com requesting a license key.
5. The Milyli Customer Advocate team will respond with a license key.
6. Click on the **'Apply License'** button.
7. Paste in the license key.
8. Click on **'Apply Chronicle License'**.
9. Chronicle will be successfully licensed.

Adding the Chronicle Agent

Chronicle includes a useful feature that allows custom privilege log columns to be written back to the **Relativity Document** object. For example, if the privilege log has a **Subject Matter** column that concatenates multiple Relativity fields together, the final concatenated form will be written back to a new document field of the users choosing.

Writing to a large number of documents can take time, up to 30 minutes for 10,000 documents, so a Relativity agent is used to perform this work. To install the Chronicle Agent, follow these steps. While the work does take some time, it is not resource intensive and can be run alongside any other agent.

1. Log into Relativity as a Relativity Administrator
2. On the admin tabs, navigate to **Server & Agent Management > Agents**
3. Click on **New Agent**
4. For **Agent Type** browse and select the **Chronicle Agent**
5. Use the defaults for the remainder of the options and pick an agent server.
6. Click **Save**

Optional Instance Configuration

Chronicle provides the ability for users to code documents from a user interface other than the coding panel when reviewing a privilege log. For some organizations, this functionality may not be required for a variety of reasons. In this case, the ability to disable edit and write functionality can be controlled through a Relativity instance setting.

To disable the functionality, add a Relativity instance setting with the following properties and set the value to true.

Section	Milyli.Chronicle
Name	DisallowEditingOnPrivilegeLogView
Type	True/False
Initial Value	False

Chronicle at a glance

Product overview

Chronicle is a supplementary Relativity application designed for templatizing Relativity document fields into tabulated columns. Data can either be displayed as-is or concatenated with plain text or multiple Relativity document fields. Templates provide fast and live construction of privilege logs, production logs, or easy-to-read coding logs.

Once templates are defined, Chronicle aids the finalization of logs through filtering and quick editing. If templates are defined early in a review, Chronicle supplements the review by providing output previews for reviewers to quickly see what more complex columns, such as a privilege narrative, may look like.

Chronicle Name Normalization is a new feature that will help recover valuable time by helping simplify processes, expand who can be involved with name clean-up, and promote reuse of work-product as often as possible. You can organize subsets of your data for review by creating an unlimited number of projects. Create one large project with everything or utilize smaller individual projects to help parallelize your teams' efforts.

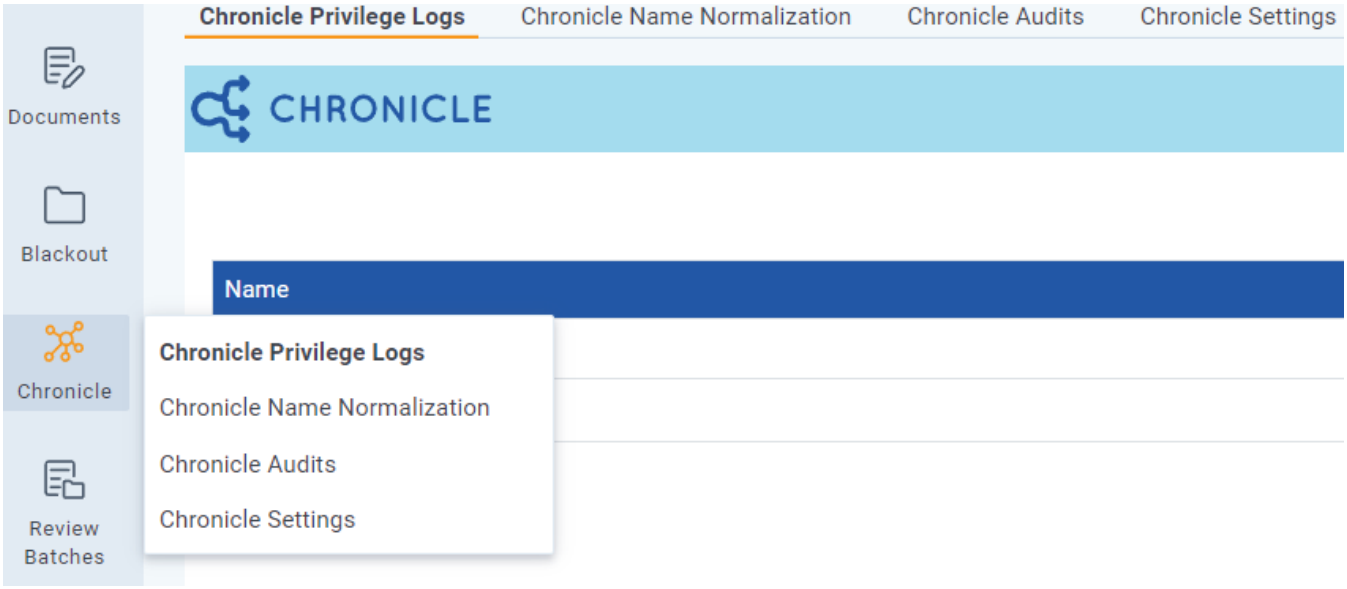
This guide will demonstrate simple workflows for implementing Chronicle with a review team's workflows and enable those teams to build and edit logs efficiently, all while maintaining the integrity of the document source.

Quick look

Once installed in an environment, Chronicle can be pushed to any workspace and is immediately available for use without additional configuration.

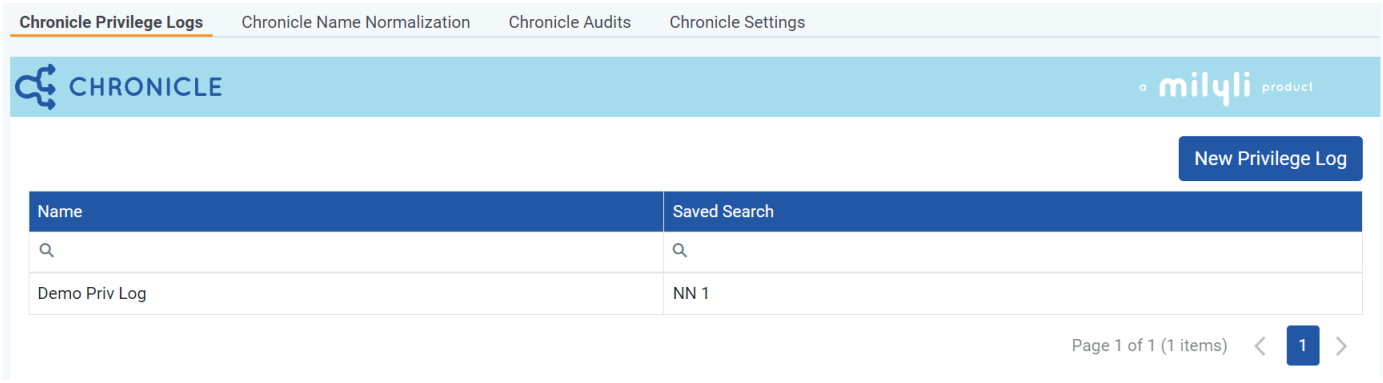
Accessing Chronicle

Once pushed to a workspace, a new tab is added named Chronicle. This tab has two sub-tabs privilege logs and settings.



The Privilege Log Tab

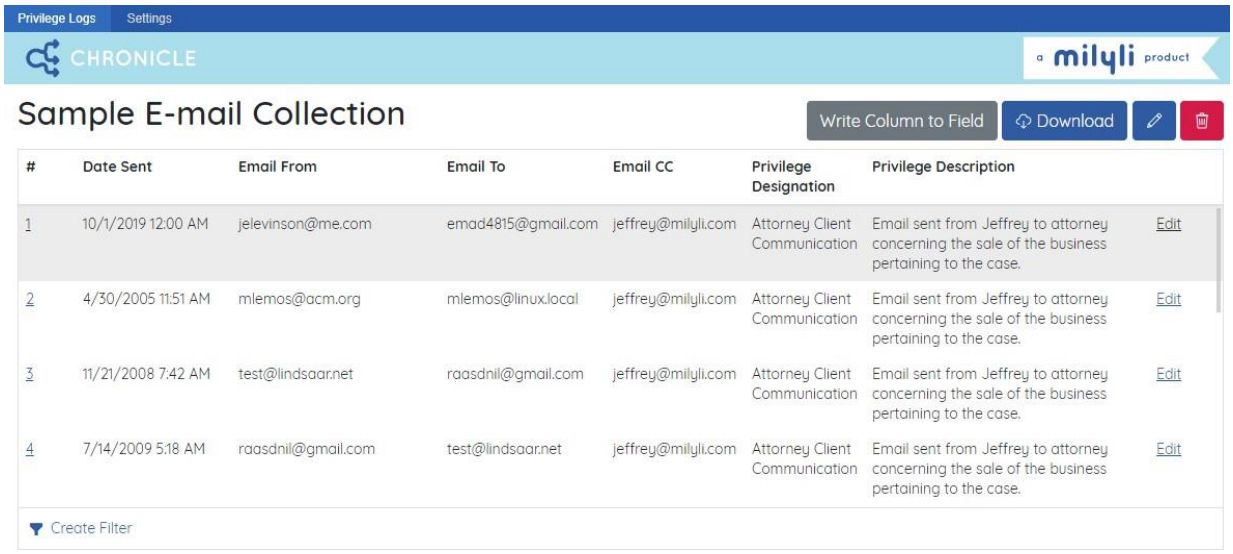
The privilege log tab serves as the launch point for building templates, reviewing templates, and granting access to perform QC.



- Clicking **'New Privilege Log'** opens a form for creating a new privilege log template.
- Clicking on **any row** in the table will navigate to the privilege log output.

The Privilege Log

After creating a privilege log template, the privilege log can be reviewed. Clicking on the log will display the compiled log for review. There are several areas of note on the privilege log that will be discussed in greater detail in this document.



Privilege log actions

- All Relativity fields will be mapped to the log based on the live values from the document
    - If the coding changes, the log will change!
- **'Write Column to Field'** will write the value of a single column to a new Relativity document field
- **'Download'** will build a CSV of the privilege log and begin the download shortly after clicking
- The icon will delete the privilege log

Editing and filtering

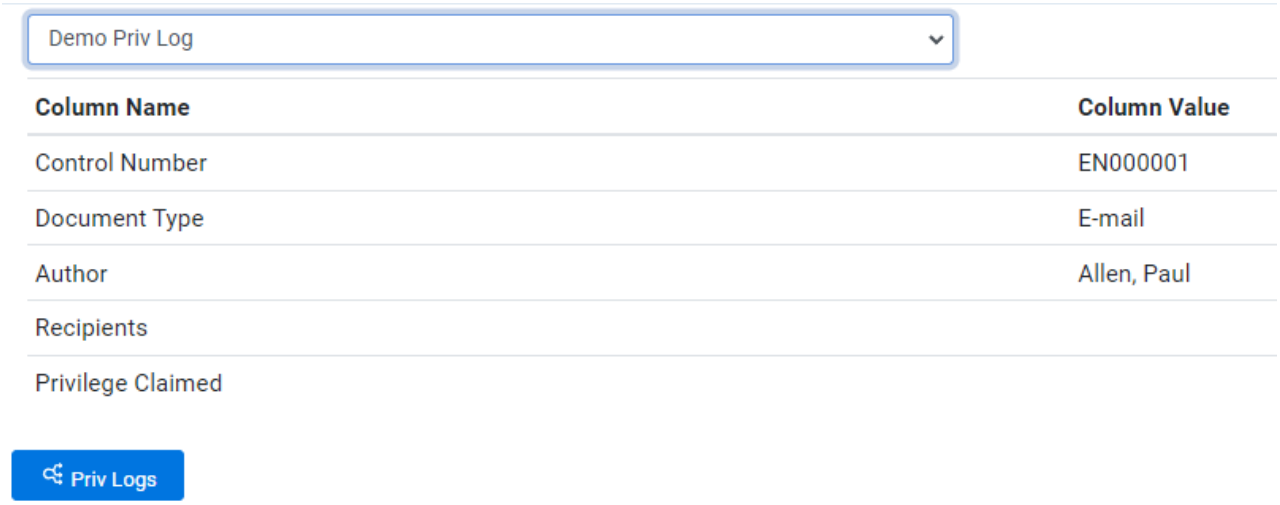
- The icon displays a form for editing the row
- The icon displays a form for filtering the log based on different fields on the log

Chronicle Name Normalization Tab

New to Chronicle with the 2.0 Update is Name Normalization. In this tab you can create Analysis Projects to normalize fields across your workspace.

The Settings Tab

The settings tab can be used to configure **Entity Tags** which annotate entities throughout the log with prefixes and suffixes of your choosing. For example, this would be a quick way of adding an asterisk to lawyer names.



Admin Tabs

System Logs

The system logs tab is where all system errors or warnings generated by issues in Chronicle are written. All common debugging will start here. When contacting Milyli support, supplying these logs will help the team more quickly diagnose any issues.

- Every column in the log can be expanded, searched, and filtered using the 🔍 button.
- System logs may also be exported using the **'Export Log'** button to the right of the screen. Clicking this will download a CSV file containing all system logs.

License

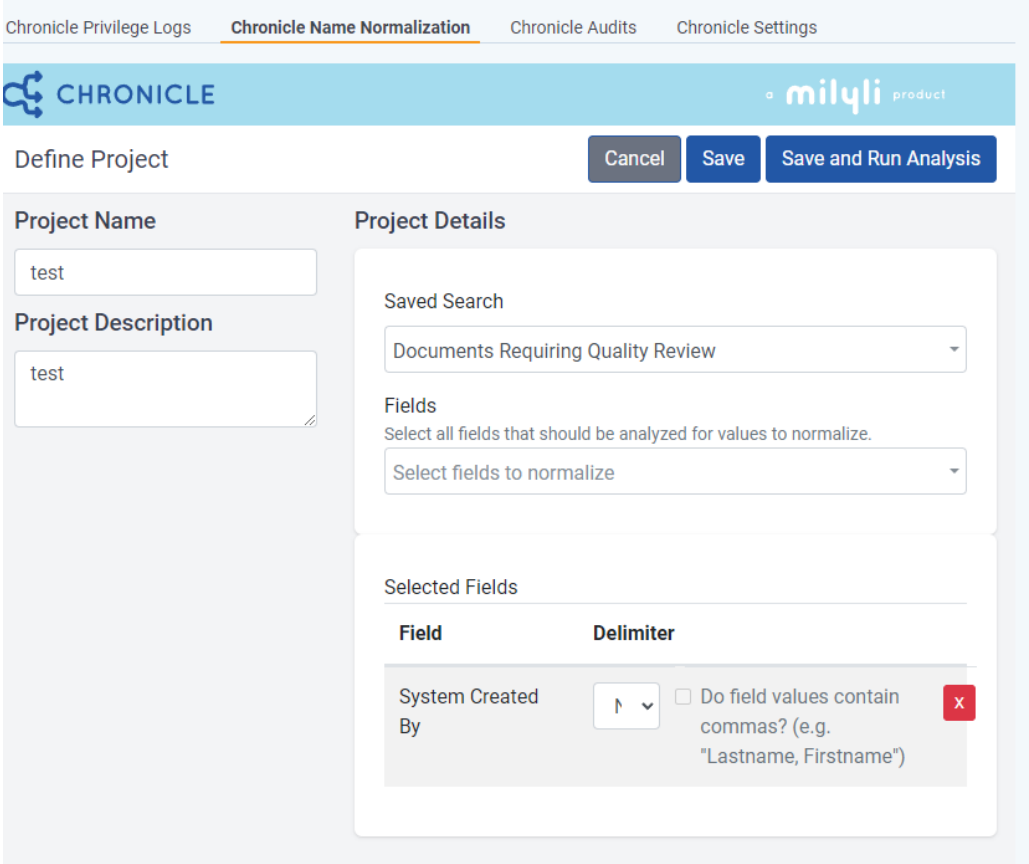
The license tab is where a license request can be generated, and a license key can be applied. This is where general information can also be found if a license has already been applied.

Name Normalization

Analysis Projects

To get started, navigate to the Name Normalization tab in the workspace where Chronicle is installed. This page will show the existing Name Normalization projects and allow you to create new projects.

Click **New Project**.



Field	Description
Project Name	Name used to Identify the Project.
Project Description	Explanation of the Project.
Saved Search	List of saved searches used to specify which documents have values that should be normalized.
Fields	List of Fields used to specify which fields contain values that should be normalized.

Field	Description
Delimiter	Appears after a field has been added. This is an Optional setting to indicate the values in a field are delimited. Available delimiter options include – None, Auto-Detect, Comma, Semicolon, Tab, and Double Comma. **Note**: The Auto-Detect option may increase the time for the analysis to run. This option is intended to help with fields containing multiple delimiters simultaneously.

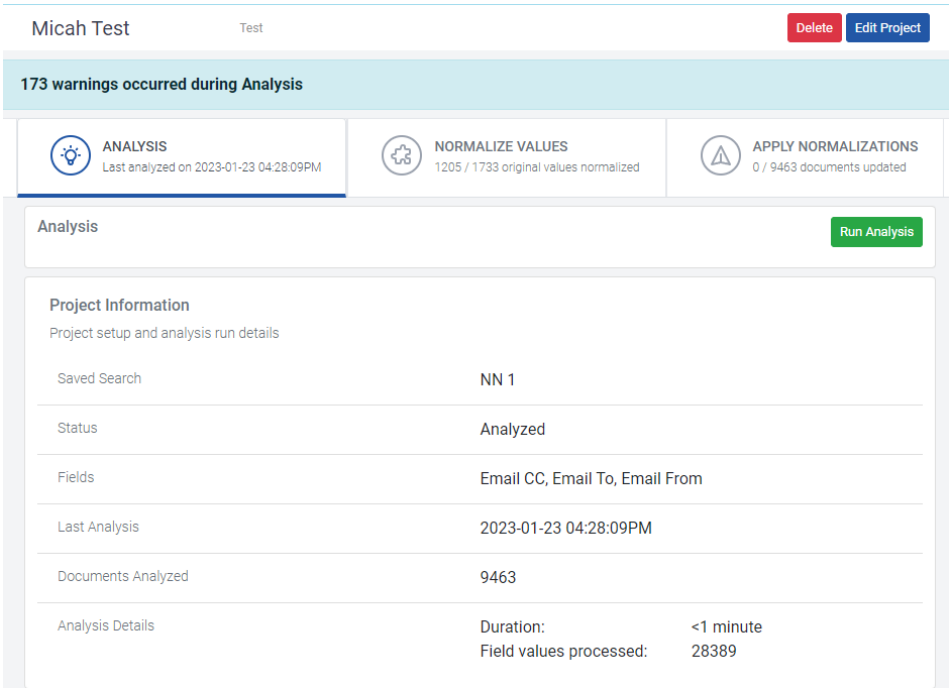
Once selected Fields and Options are selected choose **Save** or **Save and Run Analysis**.

- Save - Save will save the project but not run analysis
- Save and Run Analysis - will save and immediately kickoff the analysis process

Running a Name Normalization Analysis

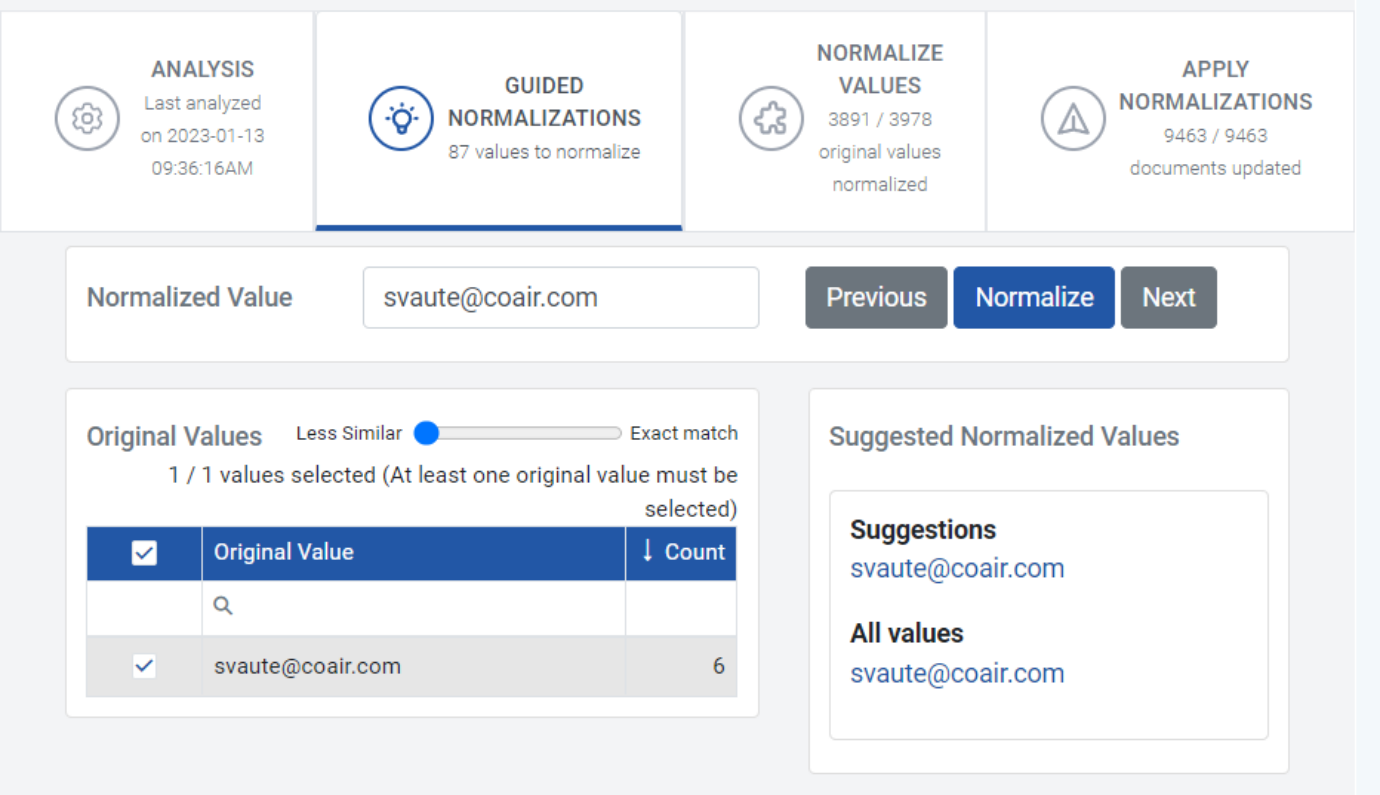
After saving the project you will be taken to the Project Information Page. From this page you can Run the Analysis, Edit the Project, or Delete the Project.

Click the Run Analysis button to run the project. Once the analysis is completed the page will update to show the results of the analysis – the number of documents analyzed, the run duration, and total amount of fields containing values that were analyzed. Access to the Normalize Values and Apply Normalizations tabs will also be available after analysis is complete.



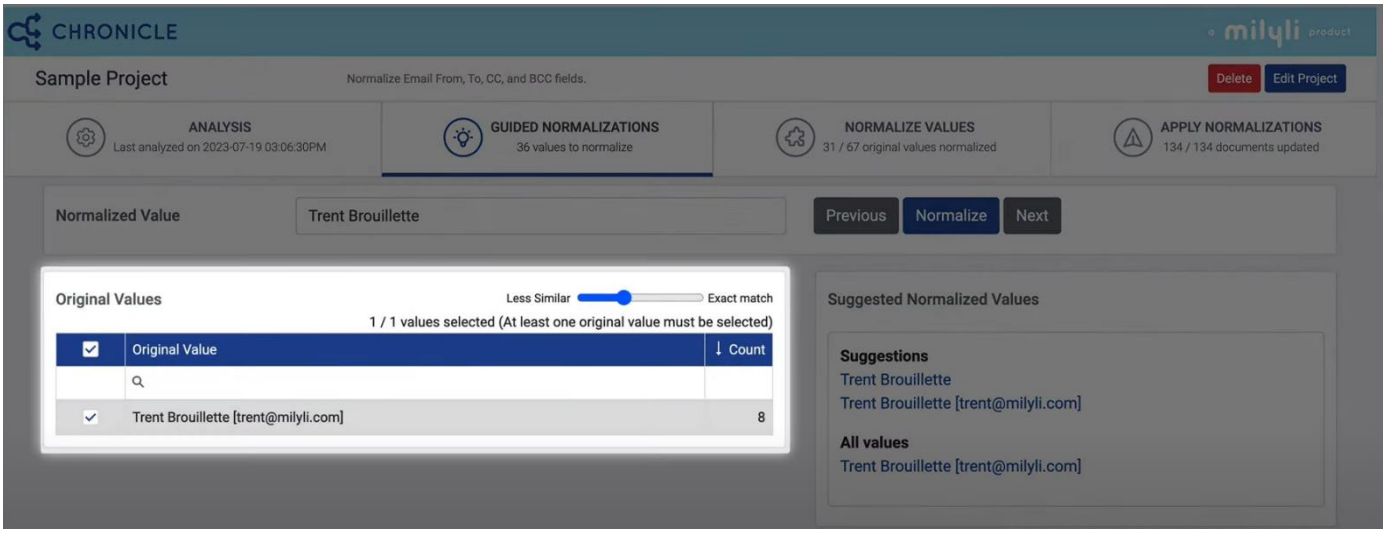
Guided Normalizations

Once the analysis has been completed Chronicle can assist in suggesting normalizations through the Guided Normalizations tab.



Original Values

The left table for original values will display all the original values that the analysis determined to be similar. These values are determined by various algorithms, data patterns, and the exactness slider setting that can be adjusted above the table.



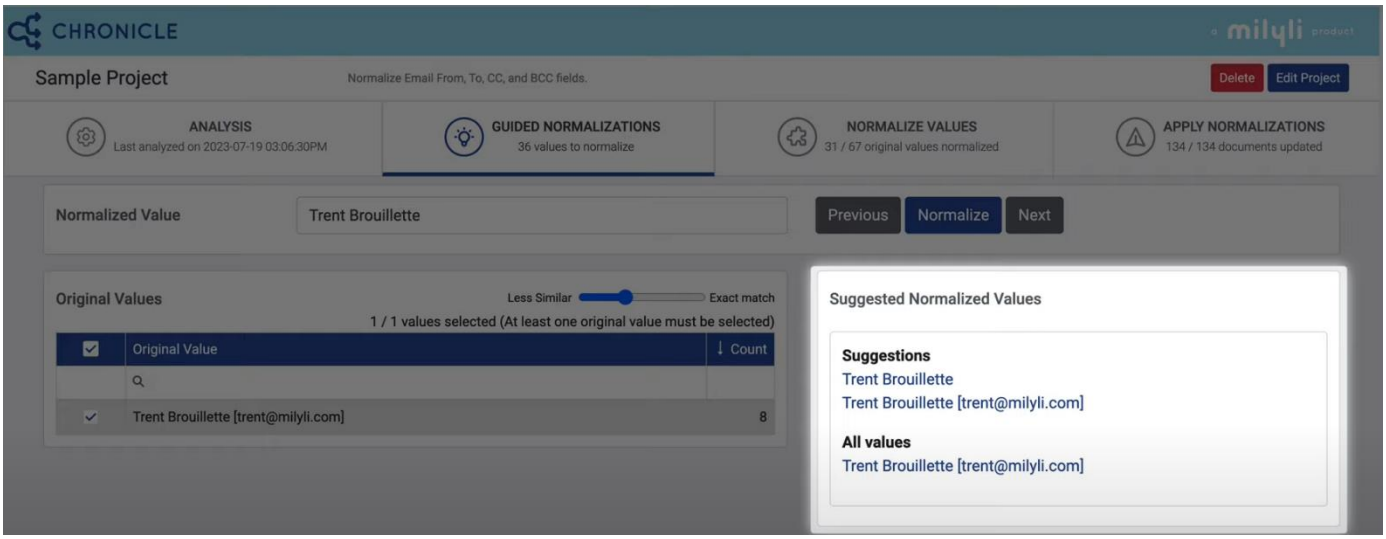
Similarity Slider

The similarity slider can be used to adjust the matching level for the original values. To the farthest right will only show exact matches and further to the left will show less and less similar matches to the original value.

A system admin can modify the default value displayed by adjusting the instance setting, DefaultMinSimilarityPercentage. To see info on this advanced feature please see the section on Chronicle Settings.

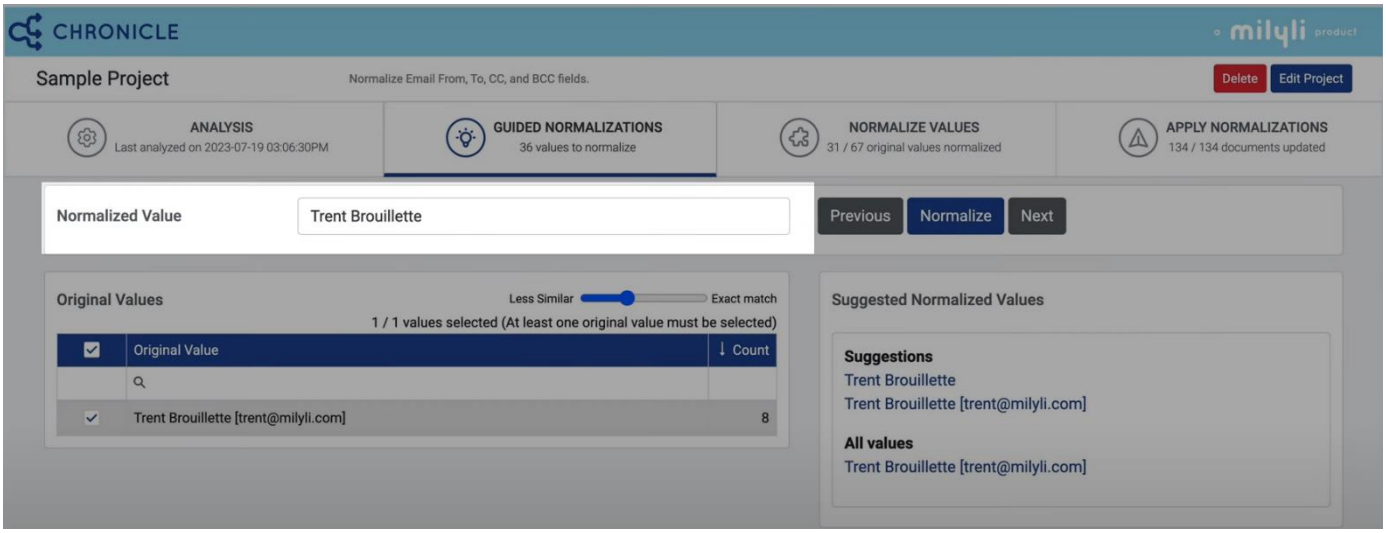
Suggested Normalized Values

The right table contains the Suggested Normalized Values that the system recommends to use for the checked original values. Users can click on the blue text in the suggestions to auto populate the Normalized Value text field.



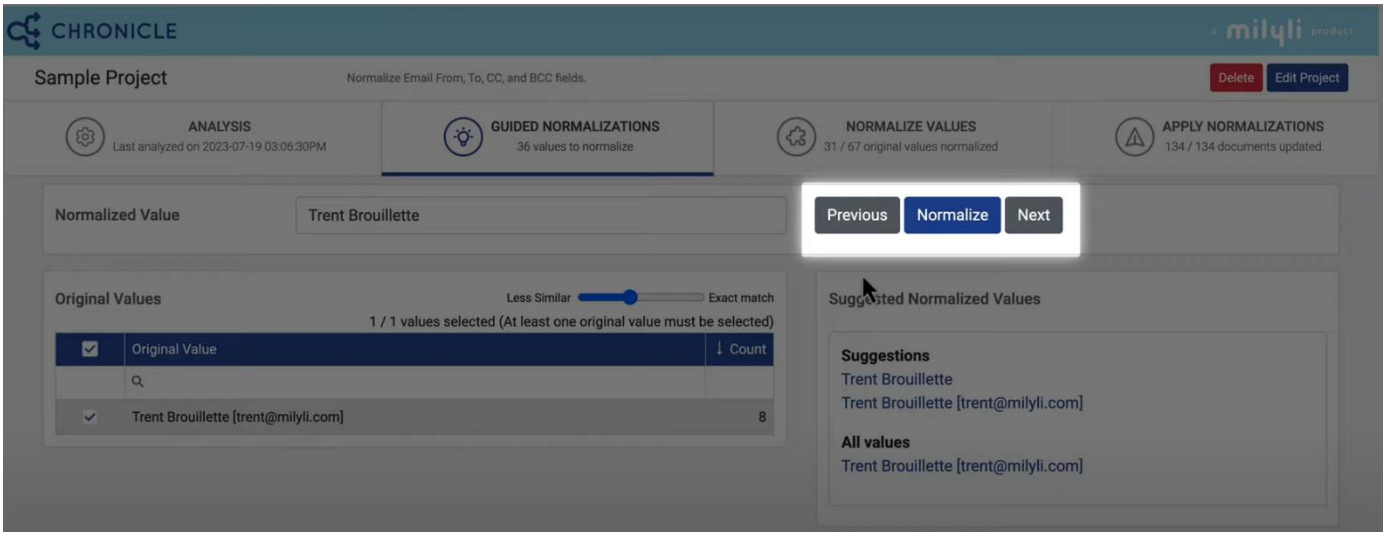
Normalized Value

In this text field the user can enter a value that they wish for the suggested Original Values to normalize to. A dropdown option is available to choose several normalized values that have already been set for the workspace. Clicking a value in the "Suggested Normalized Values" section will auto populate the text here.



Previous, Normalize, and Next Buttons

On the right of the Normalized Value text box you will find the Previous, Normalize, and Next buttons.



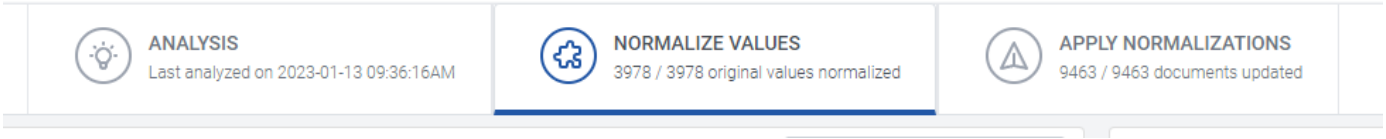
Clicking the Next button will navigate to the next most commonly occurring extracted name and present similar original names and suggestions for that value.

Clicking the Previous button will behave the same in reverse.

When the blue Normalize button is clicked, the original values checked will be normalized to the value in the text box.

Normalizing Values

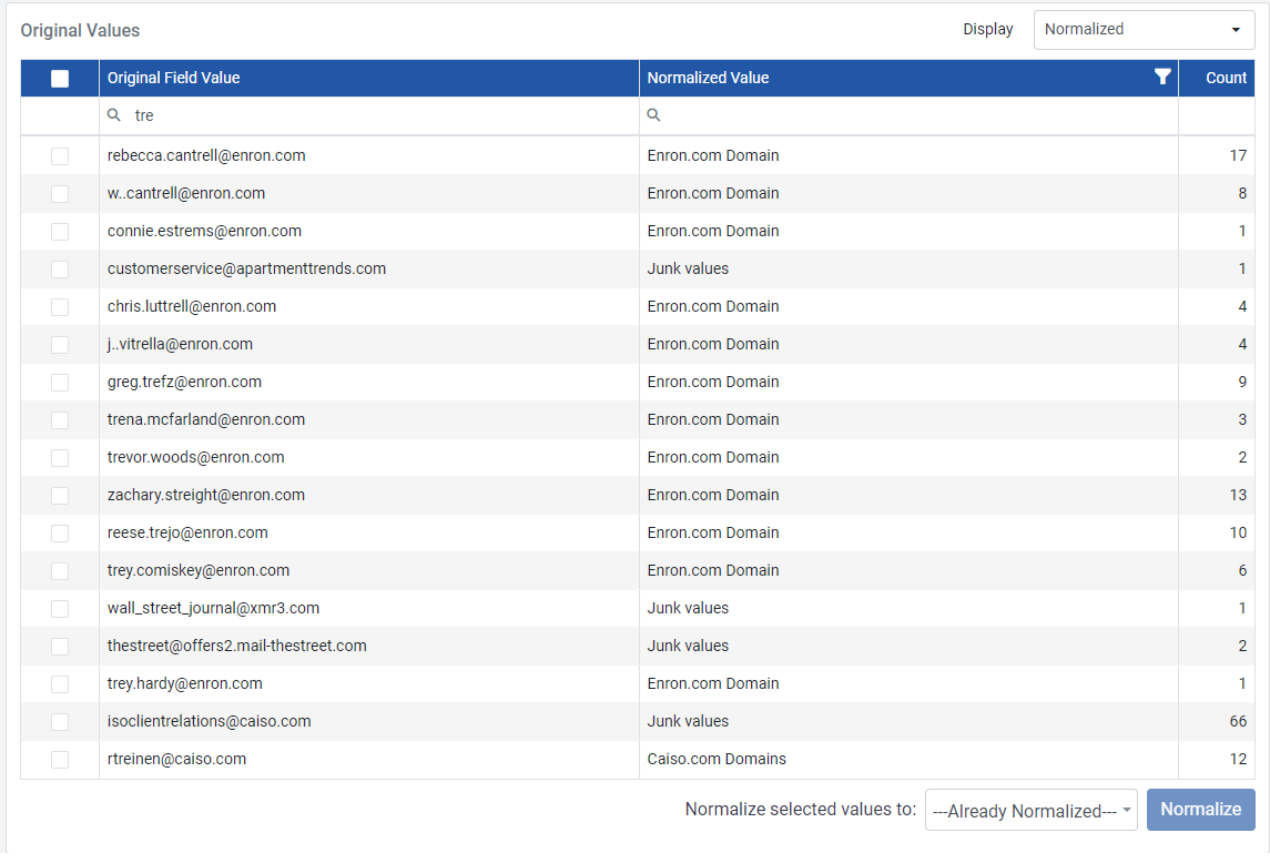
When the analysis is completed for the project click on the Normalize Values tab to begin the normalization step. Here you will see all the original values generated from the selected fields during analysis.



This page contains 2 sections: the Original Values table on the left side of the page and the Normalized Values table on the right side of the page.

Original Values

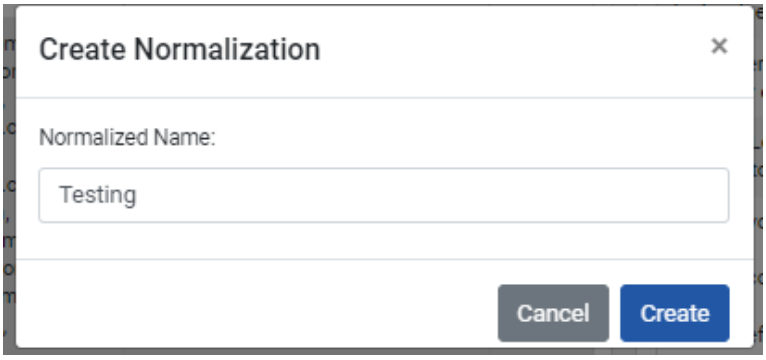
This table is where you will normalize the data. Use the filtering and check boxes to search for and select multiple values at a time. As values are normalized, that will be populated in the Normalized Value column. You can also see a count for how many occurrences the original field value was found during analysis.



Field	Description
Original Field Value	The original value of the field you wish to be normalized.
Normalized Value	If a normalized value has been added for the original value, it will display here. If not, this field will be blank.
Count	Count of the original field values found in the analysis saved search.
Display	This dropdown allows you to filter by all values found in the analysis, values already Normalized, or values Not Normalized.

Creating a New Normalized Value

To Normalize a value double click on the original field value you wish to normalize. A new window will appear prompting you to enter a normalized name for the value.



Once you have created the normalization it will be added to the table on the right under the Normalized Values.

Adding an Original Value to an existing Normalization

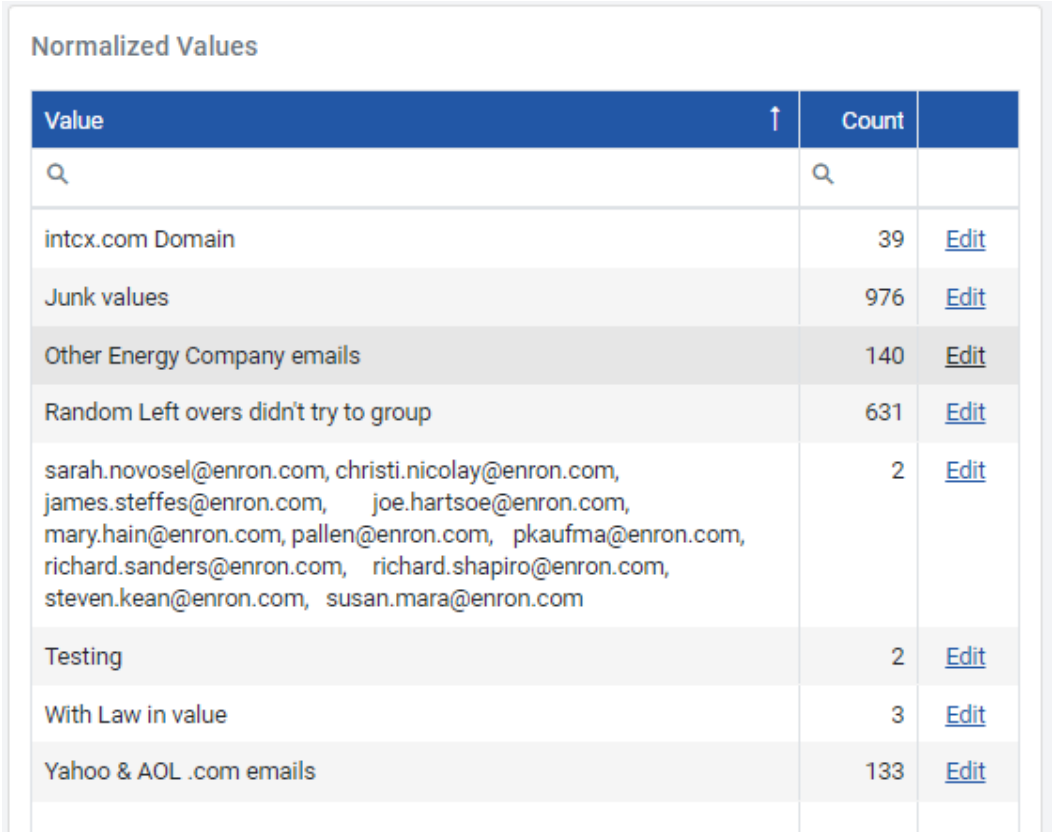
To add an original value to an already normalized value:

1. Click the Checkbox next to the original field value
2. Choose the Normalized Value from the dropdown at the bottom of the original values table
3. Click Normalize

This will add the checked values to an existing normalization.

Normalized Values

The table on the left side will begin populating as you create new normalizations. This table will be used to see how many values exist for each normalized value created and allow you to view and edit the original values tied to the normalization for QC purposes. You can also delete a normalized value you no longer want.



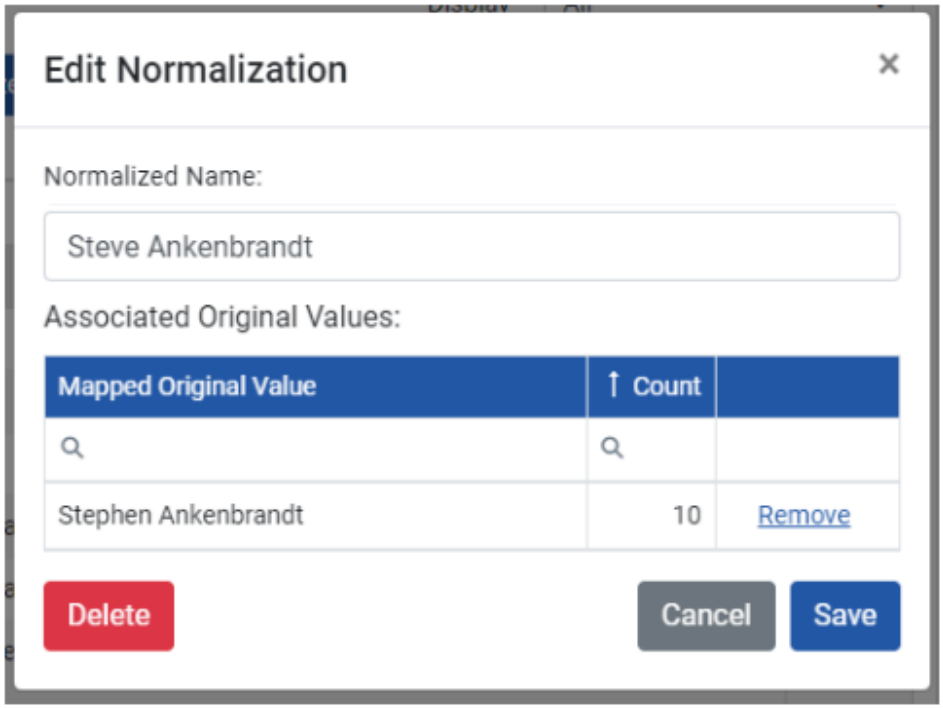
Field	Description
Value	The entered normalized value.

Field	Description
Count	The total count of fields that will be normalized to the new value.
Edit	Allows you to remove original values from that normalization, change the normalized name, and delete the normalization from the list.

Users can edit Normalized Values in one of two ways, clicking on the Edit button for the row or by double-clicking on the row.

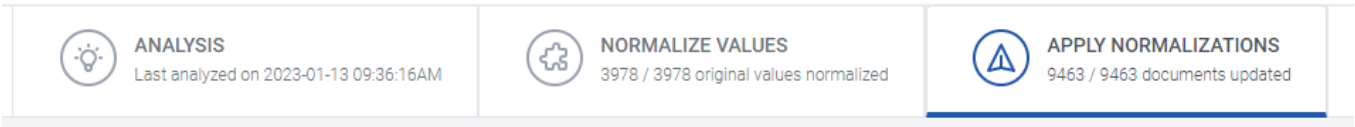
From the Edit Normalization window, you can:

- Change the value of the normalized name
- See a list of Original Values that are Mapped to this Normalized Value
- Delete the Normalized Value



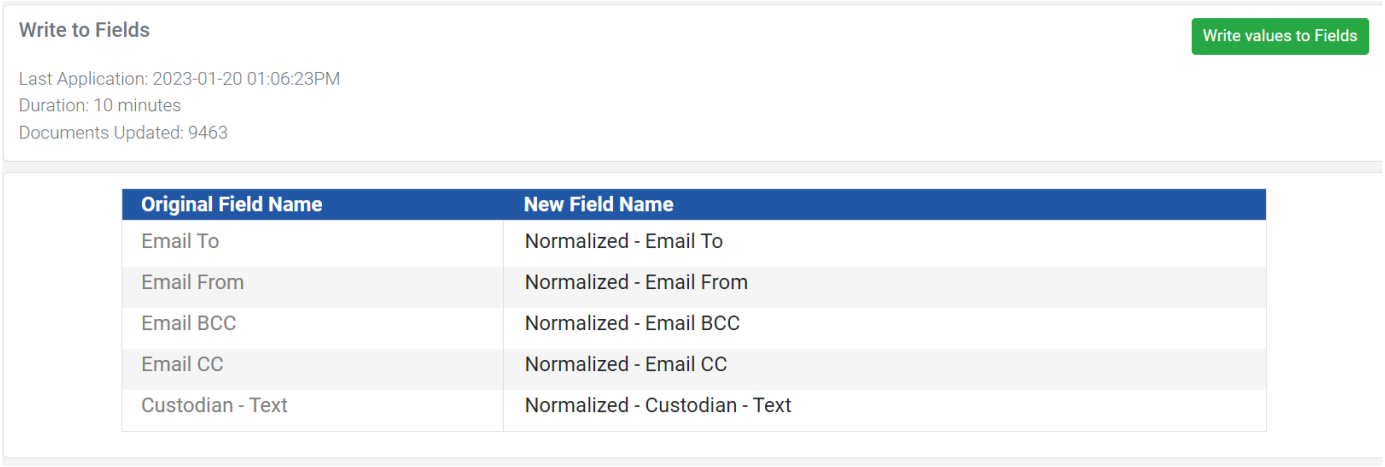
Applying Normalizations

Once you have completed the normalization process the next step is to write the normalized values into Relativity fields.



To begin the 3rd step, navigate to the **Apply Normalizations** tab. On this tab you will see the Original Field Names configured for the project and the New Field Names where the normalized

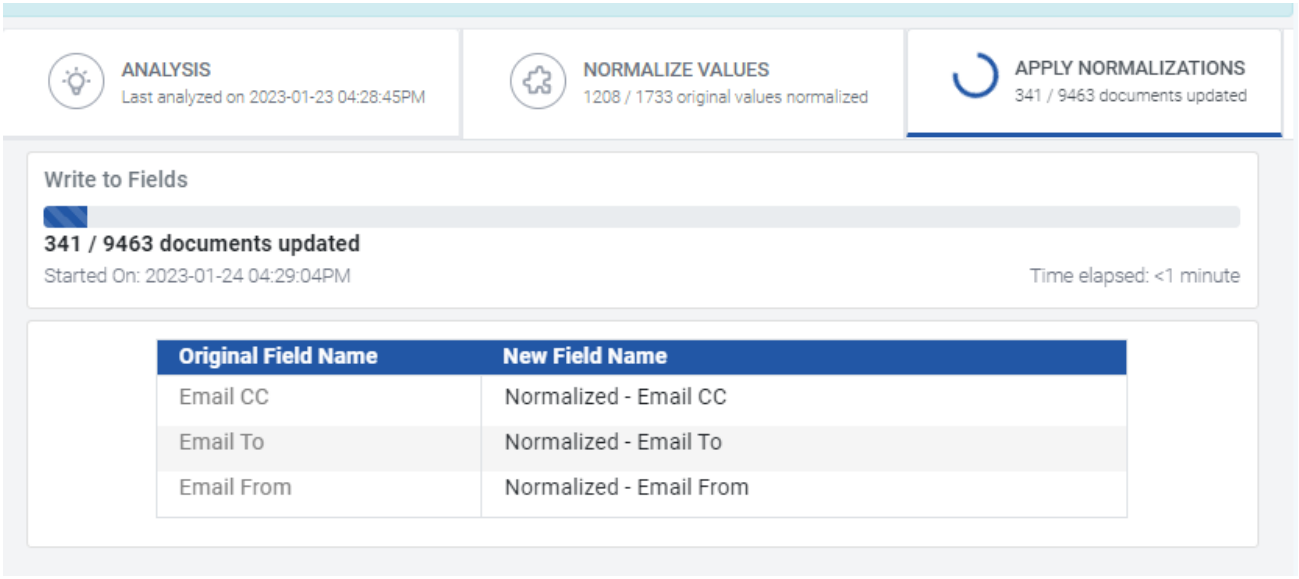
values will write to.



Original Field Name	New Field Name
Email To	Normalized - Email To
Email From	Normalized - Email From
Email BCC	Normalized - Email BCC
Email CC	Normalized - Email CC
Custodian - Text	Normalized - Custodian - Text

After clicking Write values to Fields the process will begin, and the page will display a progress bar with the start time and number of documents being updated.

Note: If a similar field name already exists, Chronicle will write to that field instead of creating a new field. Newly generated fields will be created as long text fields in Relativity.



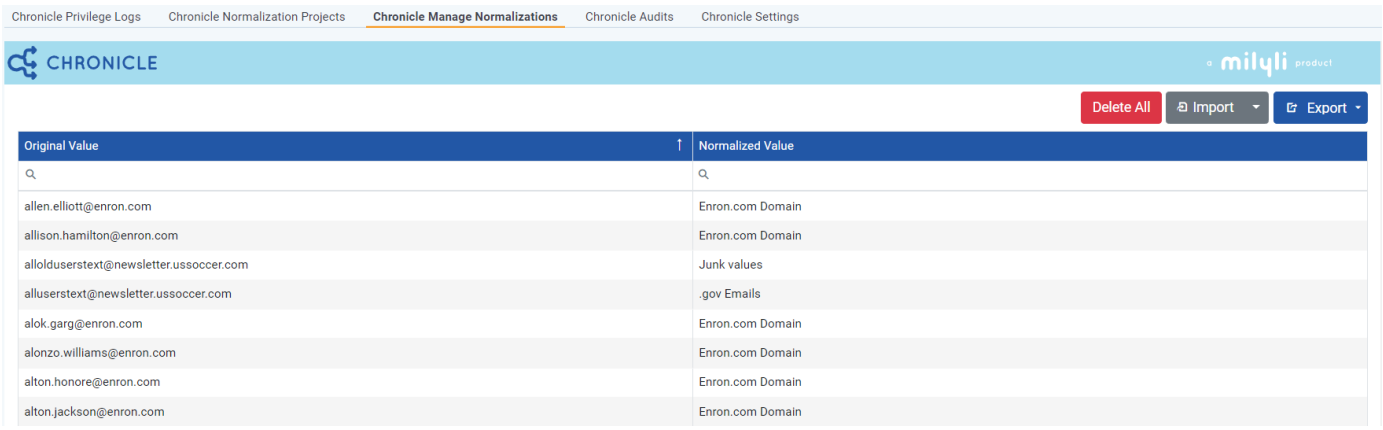
Original Field Name	New Field Name
Email CC	Normalized - Email CC
Email To	Normalized - Email To
Email From	Normalized - Email From

Managing Normalizations

The Chronicle Manage Normalizations tab allows you to reuse normalizations across workspaces, pre-load normalized values to a workspace, and report on normalizations in a workspace. On this tab, you will find the following:

- A list of all original value / normalized value pairs in the workspace with sorting, filtering, and paging capabilities.
- An export button to export the list in CSV or XLSX format.
- An import button to import normalizations from a CSV file.

- A Delete All button that will delete all normalized names and the mappings between original values across the entire workspace.



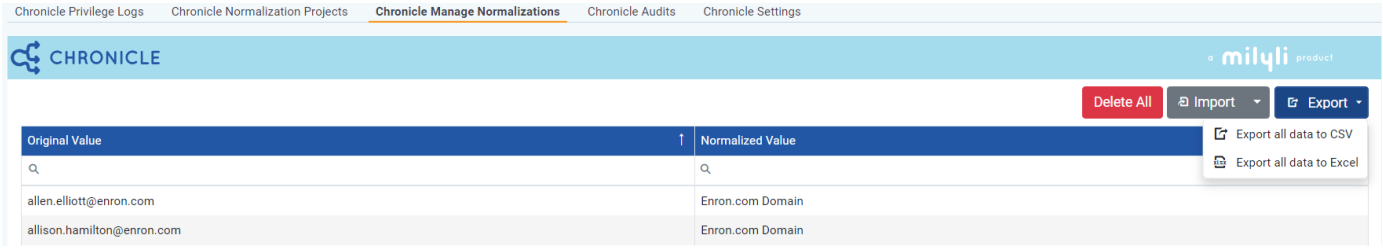
Reuse Normalizations Across Workspaces

What to know

The Chronicle Manage Normalizations tab allows users to migrate normalizations from one workspace to another. This can be helpful when you wish to reuse normalized values previously used in another case.

How to do it

1. Go to the source workspace and navigate to the Chronicle Manage Normalizations tab.
2. Click on the Export button and then Export all data to CSV.
    a. If you want to export a subset of data, use the filtering options to display only the desired rows.



3. Go to the destination workspace and navigate to the Chronicle Manage Normalizations tab.
4. Click on the Import button and select the previously generated CSV file.

The normalization values will now be available for use in the destination workspace.

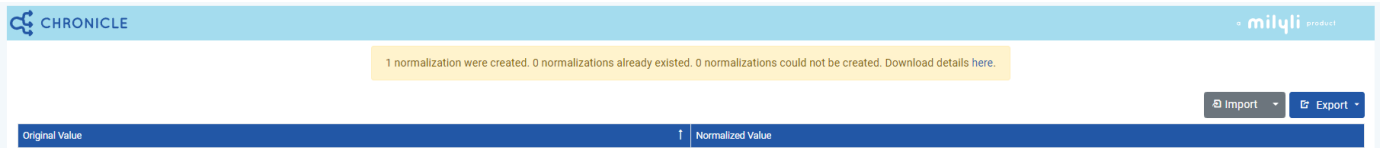
Pre-load Normalized Values

What to know

The Chronicle Manage Normalizations tab allows users to load pre-defined normalizations into a workspace. This can be helpful at the beginning of a case when you already have a list of normalized values that you want to use.

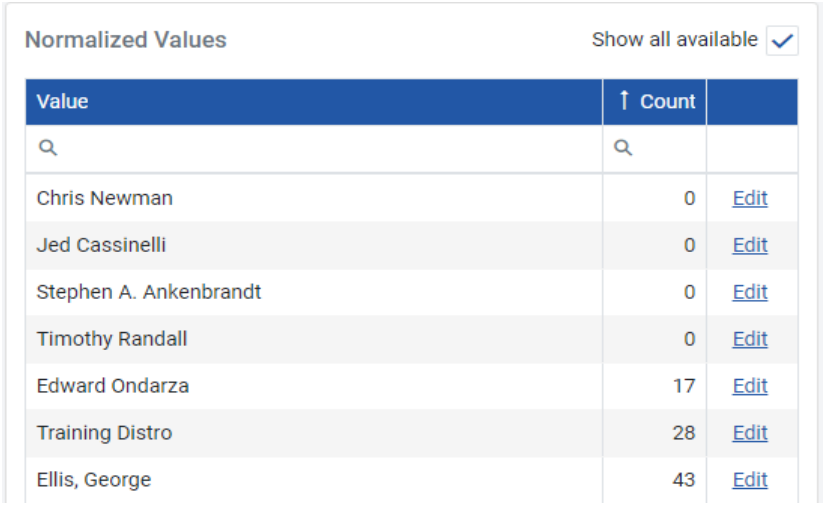
How to do it

1. Create a CSV file with two columns: Original Value and Normalized Value. Leave the Original Value column blank.
    a. A template can be downloaded by clicking the arrow next to import and choosing Download Template.
2. Fill in the Normalized Value column with the pre-defined normalized values.
3. Save the CSV file.
4. In the destination workspace, go to the Chronicle Manage Normalizations tab.
5. Click on the Import button.
6. Select the previously created CSV file.

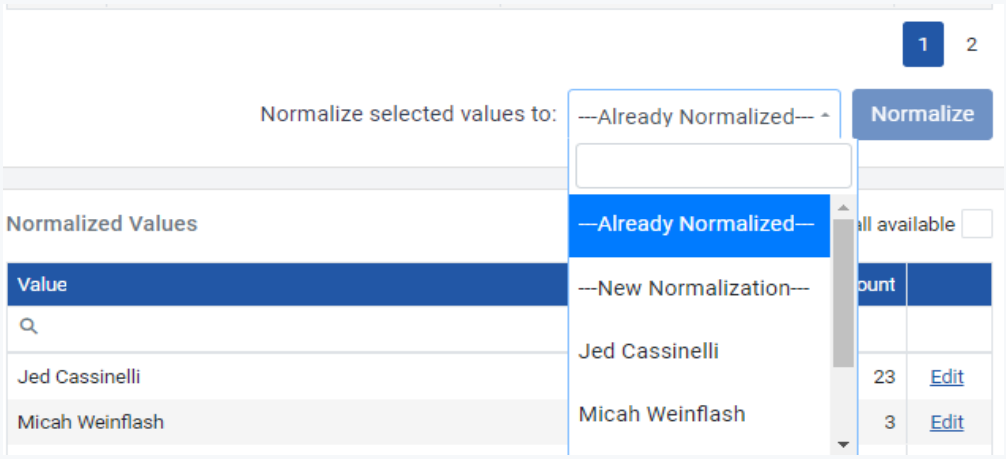


Once the import is finished, the pre-loaded normalized values will be visible in three places:

When show all available on the Normalized Values table is checked



Normalized Values drop-down



Chronicle Manage Normalizations tab

Original Value	Normalized Value
jed@milyli.com	Jed Cassinelli
Jedidiah C. Cassinelli [jed@milyli.com]	Jed Cassinelli
Jedidiah Cassinelli	Jed Cassinelli
Micah Weinflash [micah@milyli.com]	Micah Weinflash
Stephen A. Ankenbrandt [steve@milyli.com]	Stephen A. Ankenbrandt
Stephen Ankenbrandt	Stephen A. Ankenbrandt
Tim Randall	Timothy Randall

Creating a log

The core functionality of Chronicle is comprised of defining how documents in a saved search will appear on a log. A log is comprised of a saved search, custom named columns, and a definition for how each column should appear for each document in the saved search.

Creating a template

1. Navigate to the Privilege Log tab in a workspace with Chronicle installed.
2. Click **New Privilege Log.**
3. **(Required)** Input a name to easily identify the log.
4. **(Required)** Select the saved search of documents that should appear on the log.

Simple columns

Flexibility in the log comes from creating and defining columns. A column is comprised of

two key ingredients - the name, which appears as the header of the column on the log, and the outcome, which is the definition of the value that should be displayed for the column.

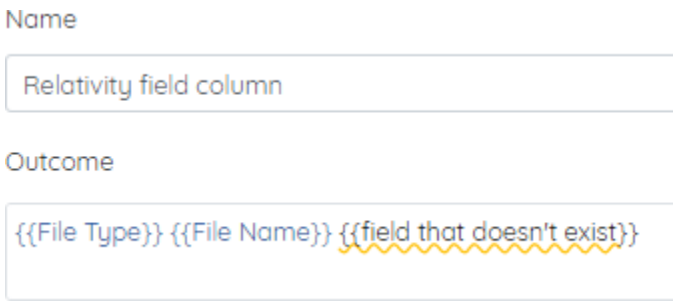
Plain text

A column can have plain text entered in the outcome. Whatever plain text is input will be displayed for each document.

Relativity fields

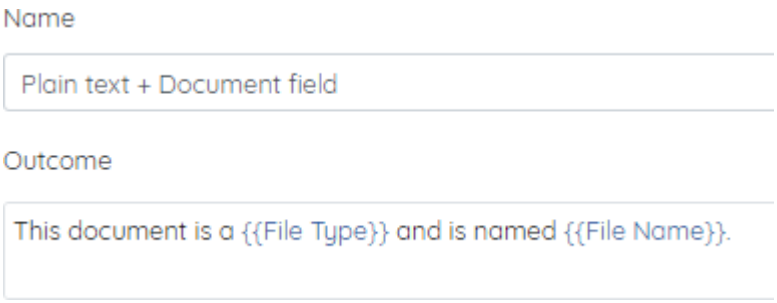
A column can have one or many Relativity fields entered in the outcome. Whatever fields are selected will be filled in based on the coding of that field on the document. To insert a field, begin by typing {{ to view a list of all of the valid fields.

Relativity fields are always displayed live on the log. The current coding of the document will be used every time the log is downloaded allowing flexibility in corrections and edits. Invalid or incorrectly entered fields are displayed with an orange underline.



Putting it together

Plain text and Relativity fields can be combined for additional flexibility.



This example also demonstrated using multiple document fields. This type of concatenation can be used to combine multiple field coding together into a single column.

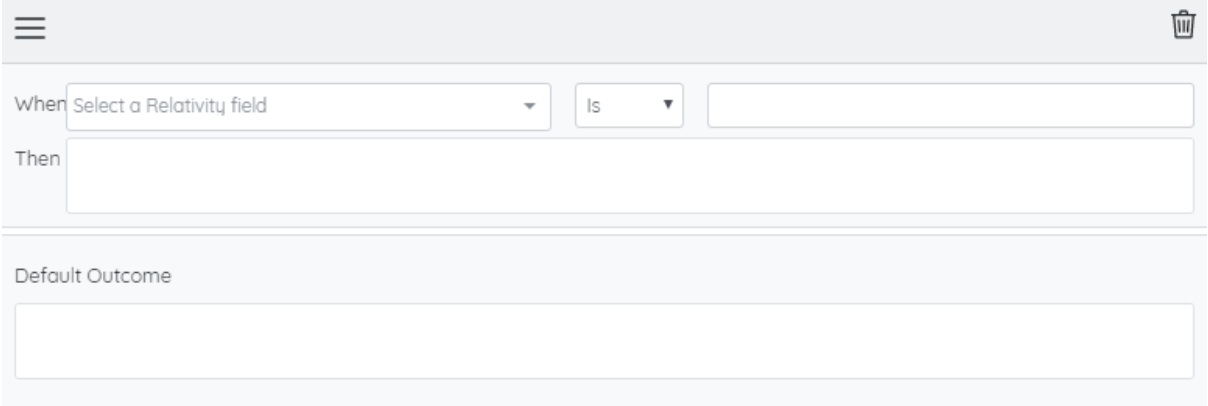
Managing columns

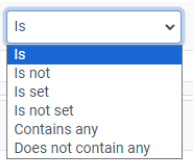
Columns can be added, removed, and rearranged. There will always be a minimum of one column.

Add Column	Adds an additional column
	Removes additional columns down to a minimum of one column
Collapse All	Expand or collapse all columns
	Expand or collapse a single column
	Used to rearrange columns--columns in the template editor are listed top to bottom and subsequently display left to right on the log

Dynamic columns

Additionally, flexibility can be added to a column by determining the outcome based on a set of conditions. This results in a logical approach to the column value that follows a "When **X** is **Y** then **Z**" statement pattern. To add this type of outcome, click the **Add Outcome** button.



When	The Relativity field that will be evaluated for the outcome
	Select the Relativity field and comparator option that will be evaluated for the outcome. The Comparators can be used against the following field types: Fixed-length text, Long text, Single choice, Multiple choice, Single object, Multiple object.
Value (blank box)	The value that will be compared to
Then	The conditional outcome constructed just like the outcome of a simple column
Default Outcome	The outcome that will be used for a document if no successful comparison is made in the comparator

Simple conditions

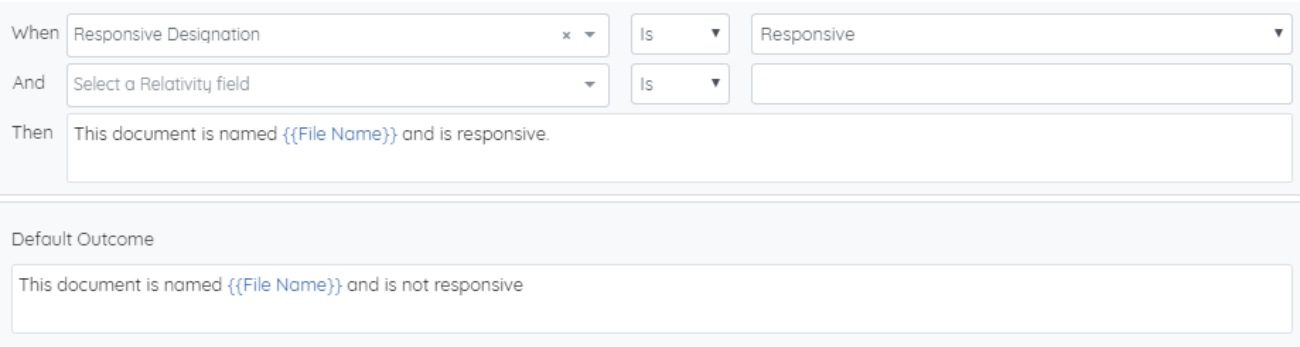
Depending on the Relativity field selected, the comparator will dynamically change to make selection easy.

- Single choice Relativity fields will display the comparison as a drop down
- Multiple choice Relativity fields will display the comparison as a multi-select box
- Yes/No fields will display as a dropdown

- All other fields will display as a text box

The following sample shows a comparator that evaluates the Relativity document field **Responsive Designation** and checks to see if the field for the document is coded as **Responsive**.

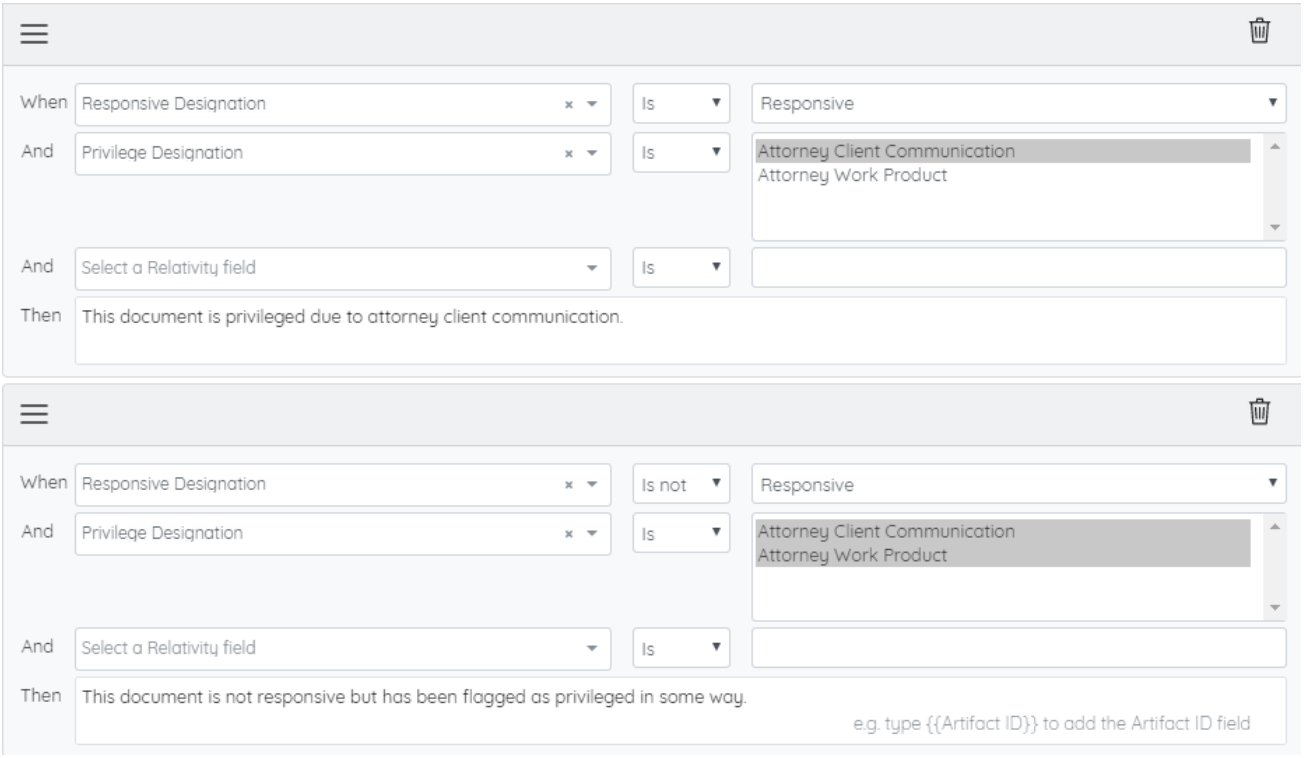
If the field is responsive, the log will display the phrase “This document is named {{File Name}} and is responsive.” where the File Name tag will be replaced with the file name. Otherwise, if the document is not responsive, the default outcome will be displayed.



Advanced conditions

Multiple conditions can be used with each having their own independent configuration. There are no limits to how many or how complex these comparisons can be, allowing for a near infinite amount of flexibility in defining the logs outcome.

The following sample shows a column that utilizes multiple outcomes with multiple conditional statements.



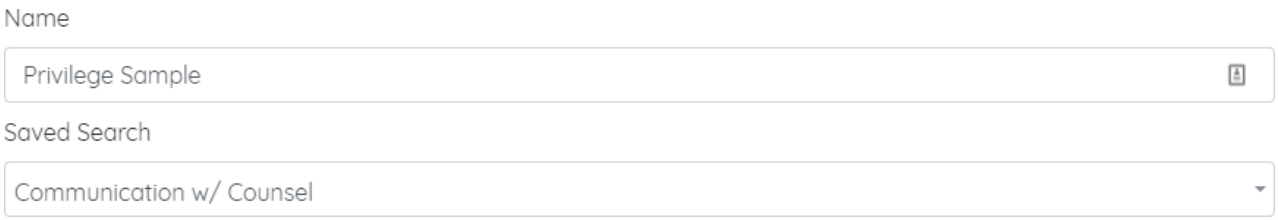
The end result will be evaluated from top to bottom. The first condition that is true will be display the corresponding outcome on the log.

Putting it all together

Using the techniques demonstrated here provides flexibility in constructing the log in the manner that the review team needs. Utilizing field tokens enables documents to be re-coded or updated with corrections and have those immediately reflected on the log. Additionally, any documents that are added to the saved search will automatically be added to the log.

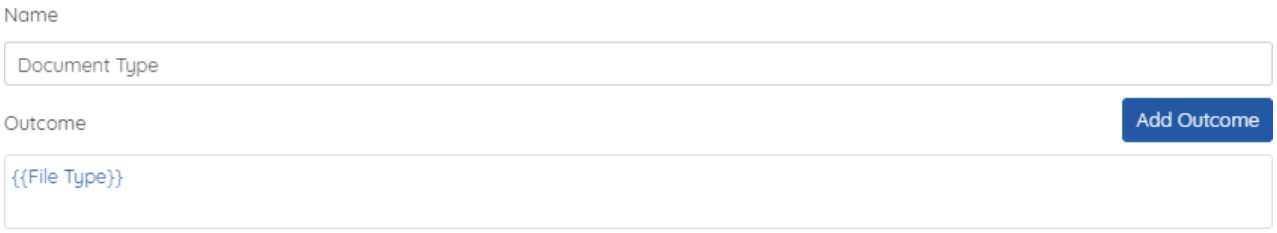
A sample template is included below that demonstrates what a template may look like and the corresponding outcome for a simple privilege log.

Name and saved search

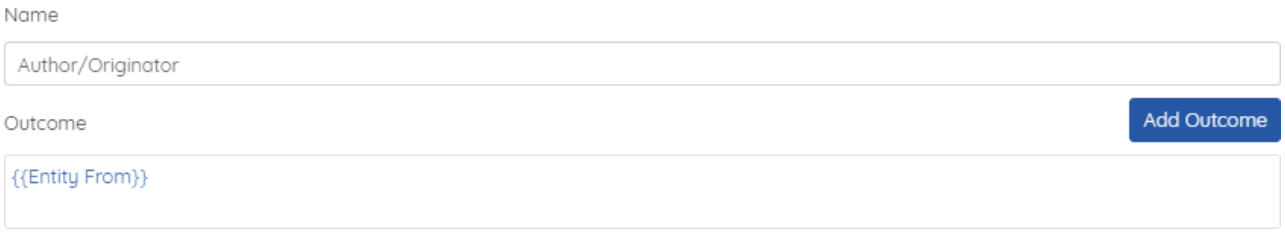


Columns

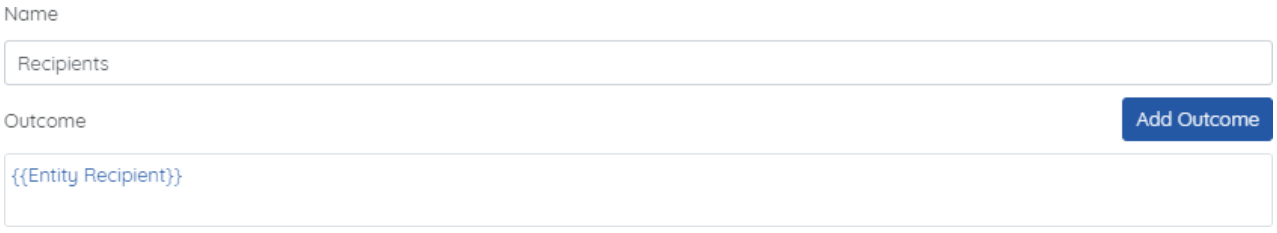
Document Type



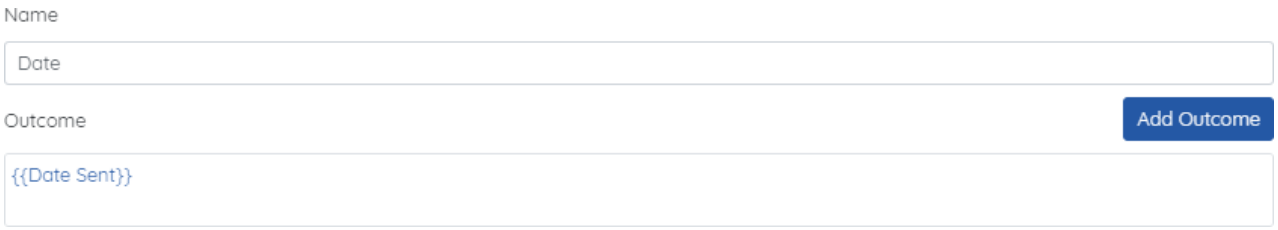
Author/Originator



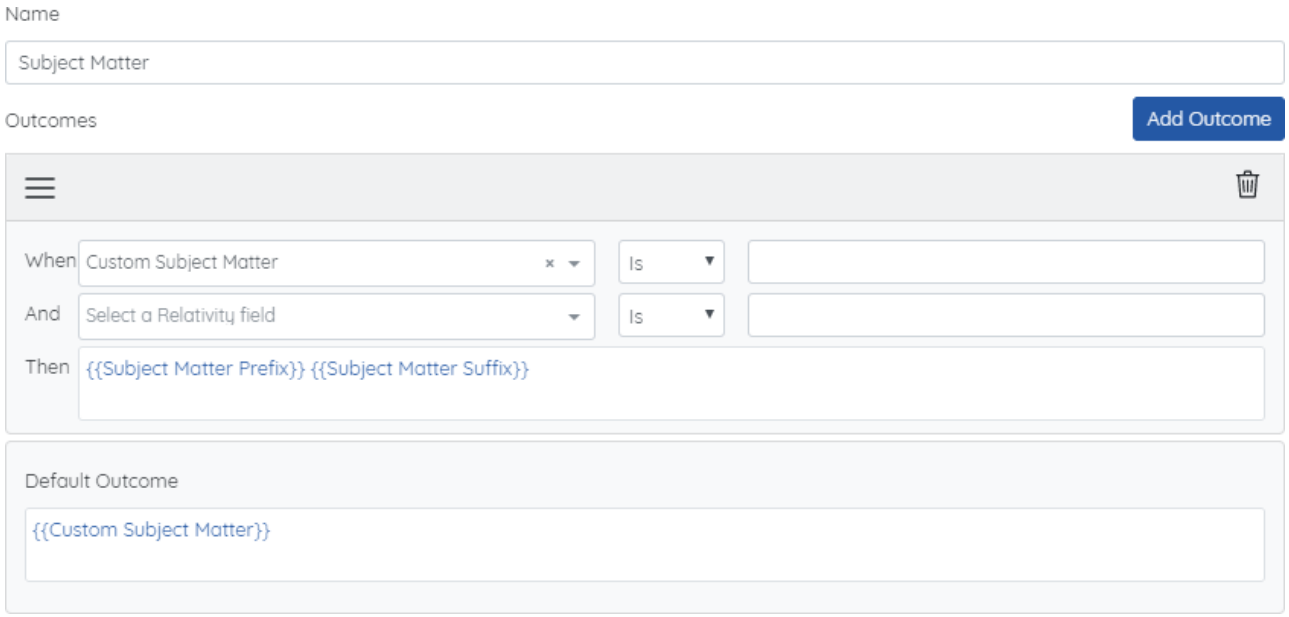
Recipients



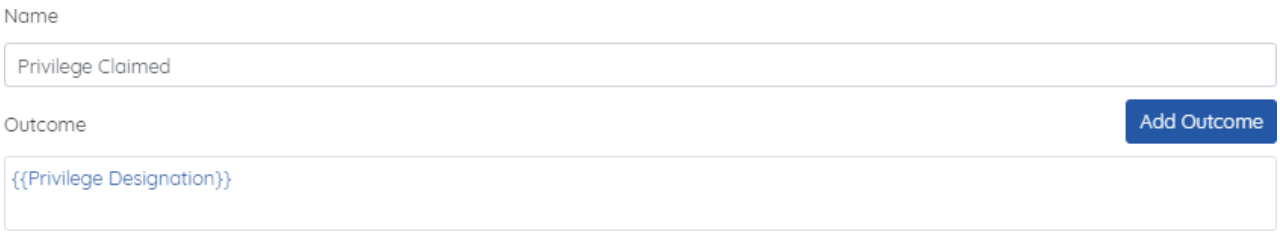
Date



Subject Matter



Privilege Claimed



The final result

Privilege Sample

Write Column to Field | Download

#	Docume... Type	Author/Origina...	Recipients	Date	Subject Matter	Privilege Claimed
1	SMTP E-Mail Message	Randall, Tim	Monaghan, Scott, Nachtsheim, Peter, Peter Brown	8/29/2017 4:10 PM	Portion of email to in-house counsel seeking advice on contract negotiations redacted.	Attorney Client Communication
2	SMTP E-Mail Message	Randall, Tim	Monaghan, Scott, Nachtsheim, Peter, Peter Brown	8/29/2017 3:44 PM	Portion of email to in-house counsel to CEO regarding options for litigation	Attorney Client Communication
3	SMTP E-Mail Message	Randall, Tim	Beredjick, Arthur, Nachtsheim, Peter	10/24/2018 1:43 PM	Email to in-house counsel seeking advice on contract negotiations redacted.	Attorney Client Communication
4	SMTP E-Mail Message	Randall, Tim	Nachtsheim, Peter	7/22/2019 8:20 PM	Portion of email to in-house counsel pertaining to legal issues regarding the liquidation of the business	Attorney Client Communication
5	SMTP E-Mail Message	Randall, Tim	June Sery, Nachtsheim, Peter	5/8/2019 7:27 PM	Portion of email to in-house counsel pertaining to legal issues regarding the liquidation of the business	Attorney Client Communication
6	SMTP E-Mail Message	Randall, Tim	Nachtsheim, Peter	5/8/2019 7:27 PM	Portion of email to in-house counsel pertaining to legal issues regarding the liquidation of the business	Attorney Client Communication
7	SMTP E-Mail Message	Randall, Tim	Monaghan, Scott, Nachtsheim, Peter	8/17/2017 9:10 PM	Portion of email to in-house counsel pertaining to legal issues regarding the liquidation of the business	Attorney Client Communication

Create Filter

Relativity name normalization

Chronicle has been optimized to work with Relativity's name normalization. After running Relativity's name normalization and cleaning up entities to the quality required by the case, several fields will be populated by Relativity analytics as a result. Both Alias fields and Entity fields can be used with Chronicle.

For example, the Entity Recipients field is a powerful Relativity field that combines the entities placed in the To, CC, and BCC fields into a single field. This field when used with Chronicle is a quick shortcut for populating recipient columns on the privilege log.

QC and log review

After creating the privilege log, reviewing the output of the log can be performed directly within the privilege log tab of Chronicle. Chronicle provides several tools for quickly reviewing, filtering, and modifying the log directly from Chronicle while safely updating the document in Relativity.

The tools that aid in quality review fall into three different categories--general tools, filtering, and editing. Each of these will be explained in greater depth below.

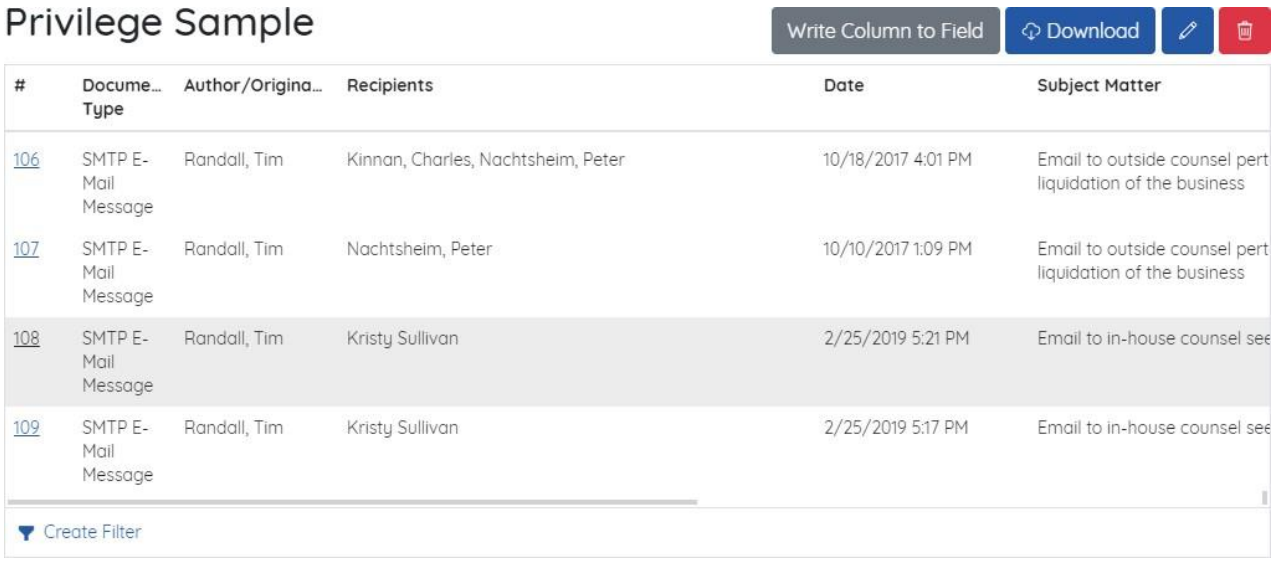
General review tools

Several quality-of-life tools are incorporated into the privilege log view that aid review. Some of these are customizations specific to each user, while others are simple helpful shortcuts.

Infinite scrolling

When the privilege log is first clicked from the Privilege Logs tab, all the documents in the saved search are available in the log and the log can be exported. However, since many of these documents should be reviewed before export, it would take a long time to load all of this data at once.

Chronicle uses an infinite scrolling function to quickly load documents behind the scenes as they are needed rather than all at once.



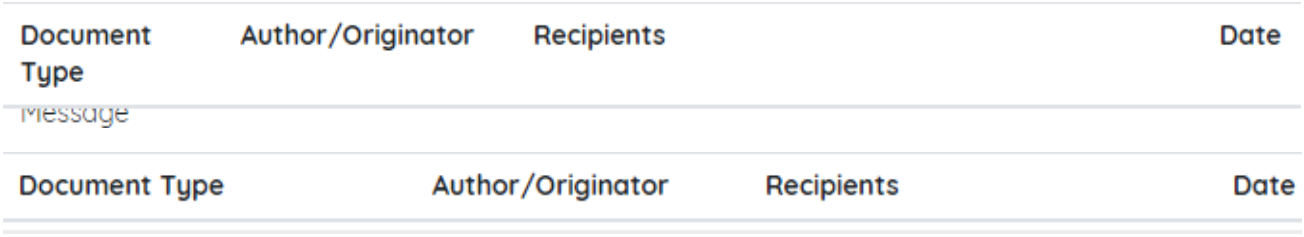
Relativity document quick nav

Each document in the log has an index number. This number does not appear on the exported log but serves as an easy-to-use placeholder for review as well as a link to the Relativity document. Clicking on the index will navigate the user to the document in the Relativity viewer. Clicking the browser back button from the navigated to document will return the user to the privilege log.

Sticky layouts

Chronicle utilizes sticky layouts for each user toreview the privilege log. This includes both the scrolled to position and column width.

To change the width of the columns, hover the mouse cursor right to the left of the column to rearrange and drag it left or right.



Changing the width is specific to each user and will automatically be loaded into the user's browser cache. This means when the user returns to the log, the column width will automatically be remembered!

Additionally, when scrolling down the page, the location that was scrolled to will automatically be remembered for each user. That means, if the user is reviewing the document on row 1,000, when they leave and return to the privilege log, they will automatically start at row 1,000.

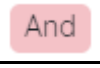
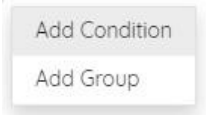
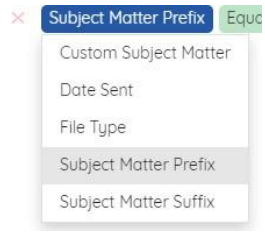
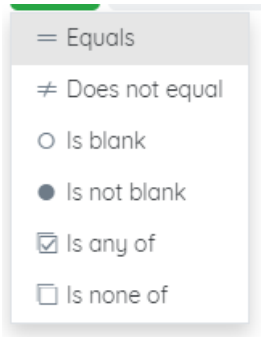
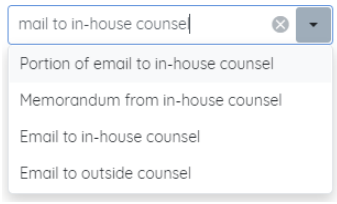
Filtering the privilege log

A filter can be applied to quickly reduce the reviewable set of the log. This can be used to review just specific rows, or, more importantly, filter the privilege log down to a set of documents that need to be corrected.

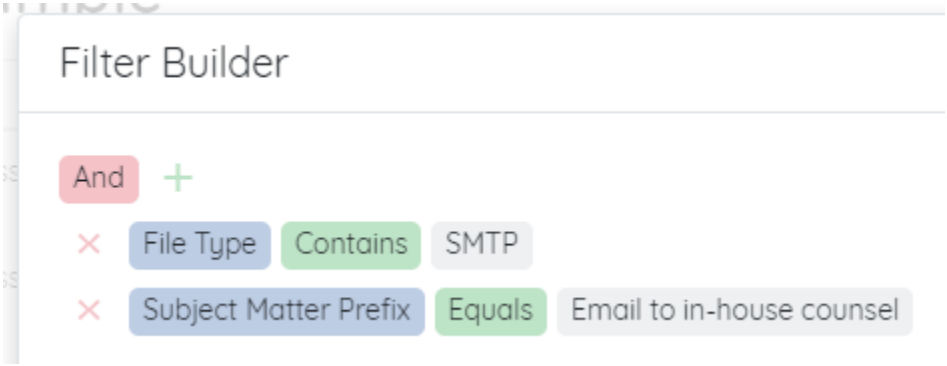
If spelling errors or coding mistakes are identified, filtering the log to just the entries that share these issues is a quick way to edit and correct the problematic rows.

To create a filter, click the **Create Filter** button in the bottom left of the log.

A filter builder screen will be displayed that provides a similar filtering complexity to a Relativity saved search.

	Indicates that the row must meet this condition
	Indicates a condition that can match exclusively opposite another condition. This does not function if there isn't at least one And condition.
	Selecting **Add Condition** adds a filter for a specific Relativity field in the privilege log template Selecting **Add Group** adds another set of conditions that must be matched as a whole to be evaluated for the filter
	The Relativity field that will be used for the condition. Due to limitations in the Relativity API on the minimum supported Relativity version, only **Text** and **Single Choice** fields can be filtered on at this time.
	The comparators that can be used for the condition.
	The values that are available for the selected Relativity field. Similar to the privilege log template creation, the available values will be displayed for selection.

After adding a condition and selecting the fields the filter builder will look like this.



In this sample, the file type field will be filtered for any document that has SMTP in the file type and any document that has the Subject Matter Prefix field coded as Email to in-house counsel.

After the results have been filtered, the filter is displayed in the bottom left of the privilege log.

The export file will only display items that meet the specified filters once they have been set.

Clicking the link will show the filter builder and the filter can be changed. Clicking the checkbox will toggle the filter off and on without removing the filter.

Finally, in the bottom right of the privilege log, a clear button is available for removing the filter.

Editing the privilege log

In general, big changes to the privilege log can be made at any time by editing the template. This will regenerate the privilege log on the fly with the corrections.

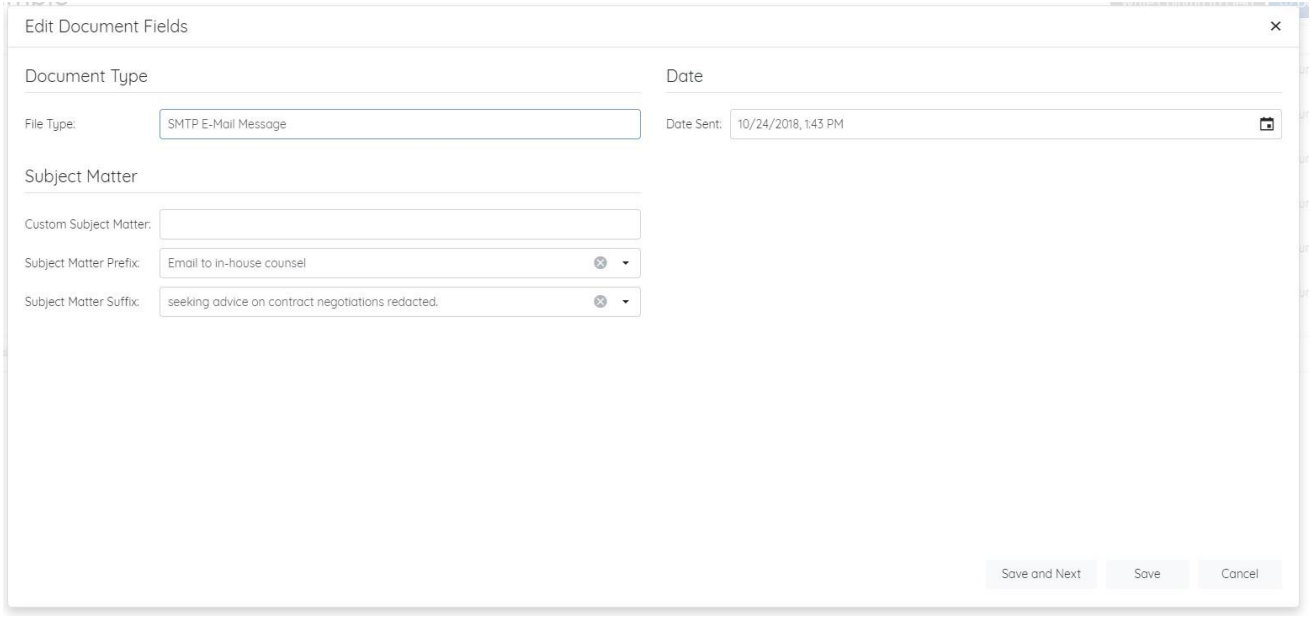
However, many of the Relativity fields that are used to construct the privilege log can be edited directly from Chronicle without navigating to the document.

This functionality provides the ability to make coding corrections on a document quickly and ensure that those changes are reflected directly in the document database and can act

as an ongoing source of truth for the case.

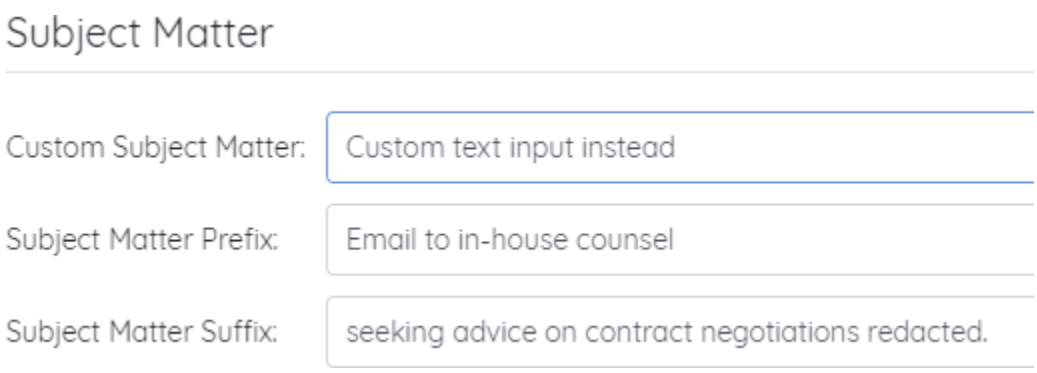
After identifying a document to be corrected, click the edit button to the right of the row on the document.

A dialogue will be displayed with the Relativity fields associated with the privilege log that can be edited from Chronicle.



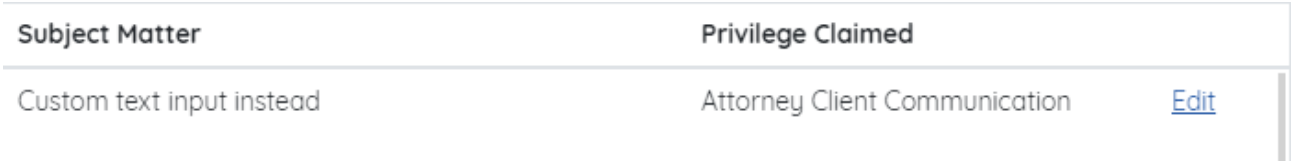
Each field type will be arranged by the column that they are associated with. This also includes the fields that are included as outcomes for any conditional statements. In this sample, the Subject Matter had a condition that checked to see if the Relativity document text field **Custom Subject Matter** had a value, and if it did not, it concatenates the prefix and suffix fields.

For this sample, the Custom Subject Matter will be edited.

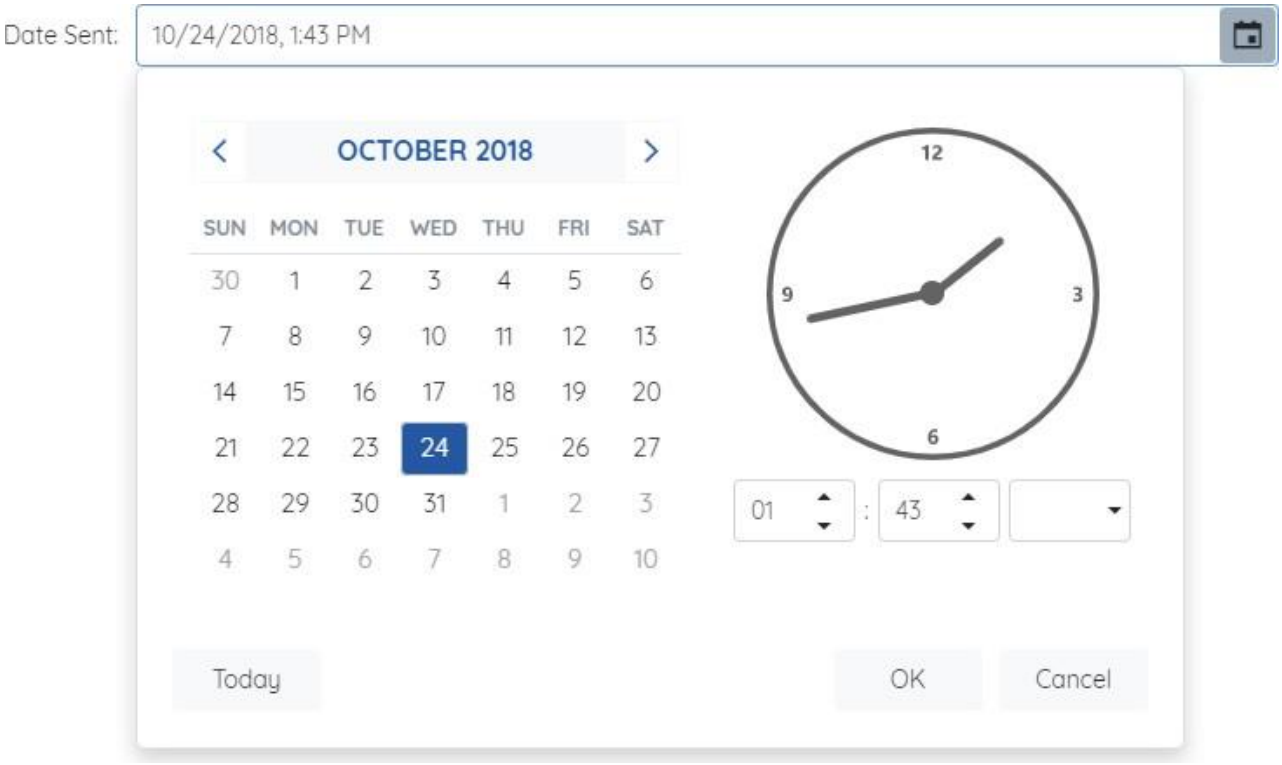


After inputting the text, the reviewer can click either **Save** which will update the field immediately and return to the user to the privilege log, or **Save and Next** which will update the field and navigate the reviewer to the next document automatically.

After saving, the coding of the document will be updated, and the change will be reflected on the privilege log immediately. All document edits performed through Chronicle are reflected in all audits as if the action was performed directly from the document viewer.



On the edit screen, each field type will have a corresponding control to make coding the field easier. For example, a Date/Time field will have a date time picker and single choice fields will have a dropdown.



Finally, it is important to note that some fields cannot be edited directly by Chronicle due to limitation in the Relativity API for the minimum supported Relativity version. These fields include **Single** and **Multiple Object Fields** and **Multiple Choice Fields**.

Early and active log review

After a template is created, there is no requirement to have all the documents in the saved search coded, or even qualifying for the saved search.

One of Milyli's goals with Chronicle was providing new possibilities and approaches for creating a privilege log. To accomplish this, a Chronicle pane was added to the Relativity document viewer that shows how the current document would appear in the privilege log as it's coded.

Early review scenario

In section 3 a sample privilege log was created that had the following column and field relationships:

Column Name	**Relativity Field**
Document Type	File Type (Default Relativity Field)
Author/Originator	Entity From (Default Relativity Name Normalization Field)
Recipients	Entity Recipient (Default Relativity Name Normalization Field)
Date	Date Sent (Default Relativity Field)
Subject Matter	Conditional field using: ● Subject Matter Prefix (Custom Single Choice Field) ● Subject Matter Suffix (Custom Single Choice Field) ● Custom Subject Matter (Customer Text Field)
Privilege Claimed	Privilege Description (Default Relativity Field)

After this template is created it can be used as a basis for other cases through template export and import (detailed in section 7). By doing so, a potential scenario could look something like this.

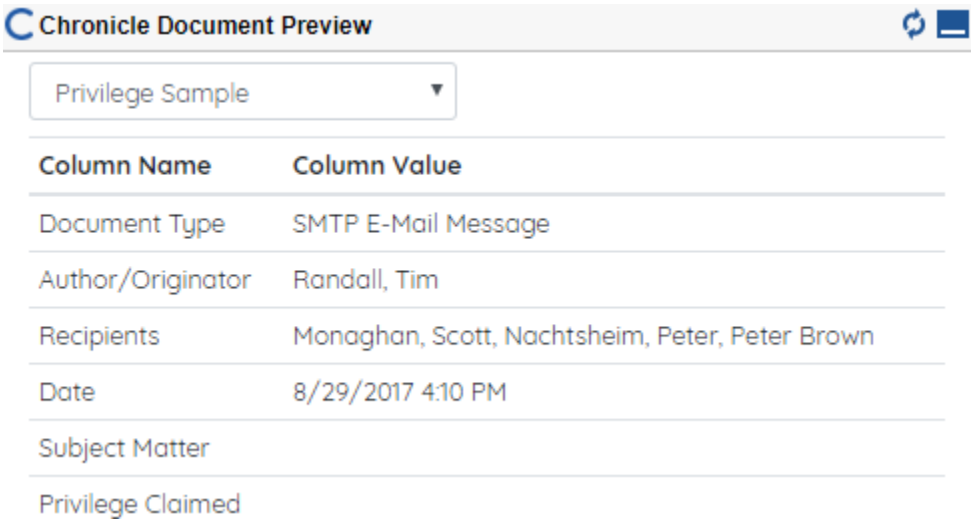
- Collection has taken place and document loaded into the case
- The privilege log requirements have been confirmed with the review team
- The privilege log template has been created or imported into Chronicle
- Review is beginning

Reviewing a document

As reviewers are working on documents, a document may be flagged as confidential and need to be coded for the privilege log. In this sample, the reviewer has come to a document that is both responsive and marked as attorney's eyes only.

The document is mostly coded with information from Relativity Name Normalization and the original collection. The first pass review marked the document as responsive and attorneys' eyes only.

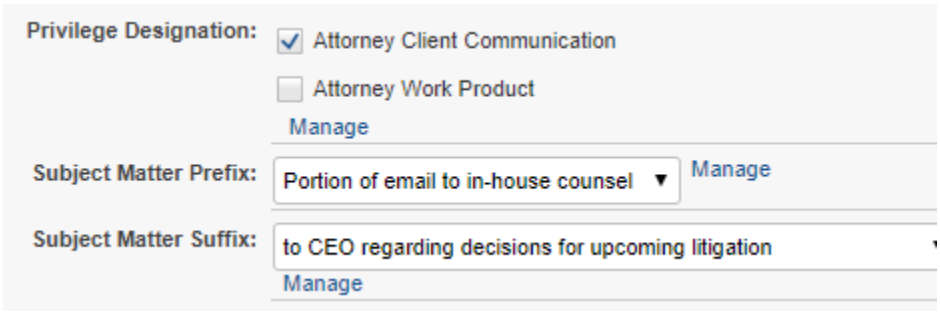
Next, we can see how this document appears right now on the privilege log by opening the Chronicle pane.



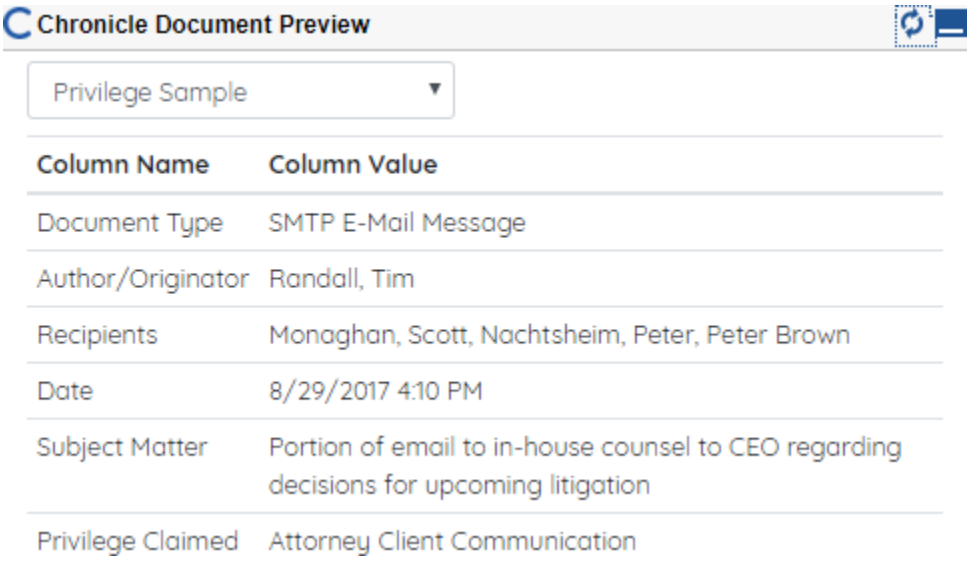
Both the Subject Matter and Privilege Claimed columns are empty, while the other columns are filled in with the metadata from the document.

Coding the document

To demonstrate the live review scenario, we will code the **Privilege Designation**, **Subject Matter Prefix**, and **Subject Matter Suffix**, to see the final entry for the privilege log.



After saving the new values, clicking the refresh on the Chronicle pane will update the preview.



Using this workflow is a great way to both code and quality control the privilege log at the same time. Additionally, it can be used to validate log entries on the fly and validate coding changes without having to go back and forth between Chronicle and the document viewer constantly.

Importing and exporting templates

After creating a privilege log, a template can be downloaded that contains all the information to load that template again as a new privilege log or into another workspace or Relativity instance altogether. This can speed up privilege log creation considerably by eliminating the need to create a fresh template each time a privilege log is created.

Downloading the template

1. Navigate to the **Chronicle** > **Privilege Logs** tab
2. Click on an existing privilege log
3. Click the edit button for the privilege log
4. Click the Download Template button
5. A file named ChronicleTemplate.json will be downloaded
    - Rename this as something that is easy to remember!
6. The file can then be used to load into other workspaces or used to create a new template in this workspace

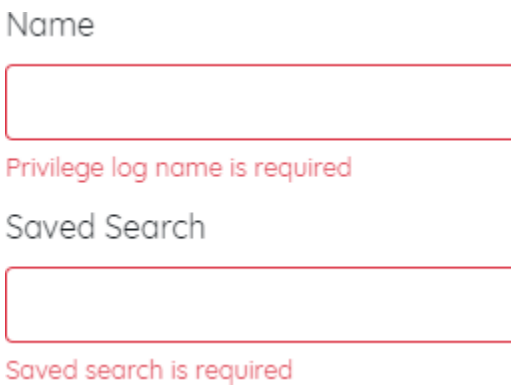
Importing a template

1. Navigate to the **Chronicle** > **Privilege Logs** tab
2. Click the **New Privilege Log** button.
3. Click the **Import/Export** button and select **Import Template**
4. Select the previously saved template file and click **Open**
5. The privilege log will be loaded

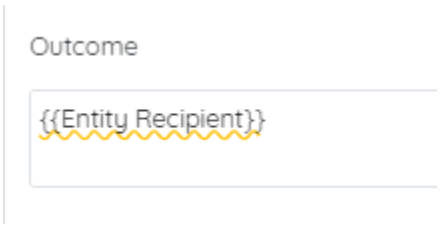
After the template has been loaded, corrections may need to be made. For example, if certain fields don't exist, they will need to be updated to fields that exist in that workspace. Generally, if workspaces are created from a template in the presiding Relativity instance, this work will be minimal.

The following list of corrections may need to be made after importing the template.

Name and saved search are both required and are not stored with a template



Outcome fields may not be properly named or exist in the importing workspace



Relativity fields in conditions may not exist and need to be updated

After correcting any noted errors, the privilege log can be saved.

Chronicle Settings

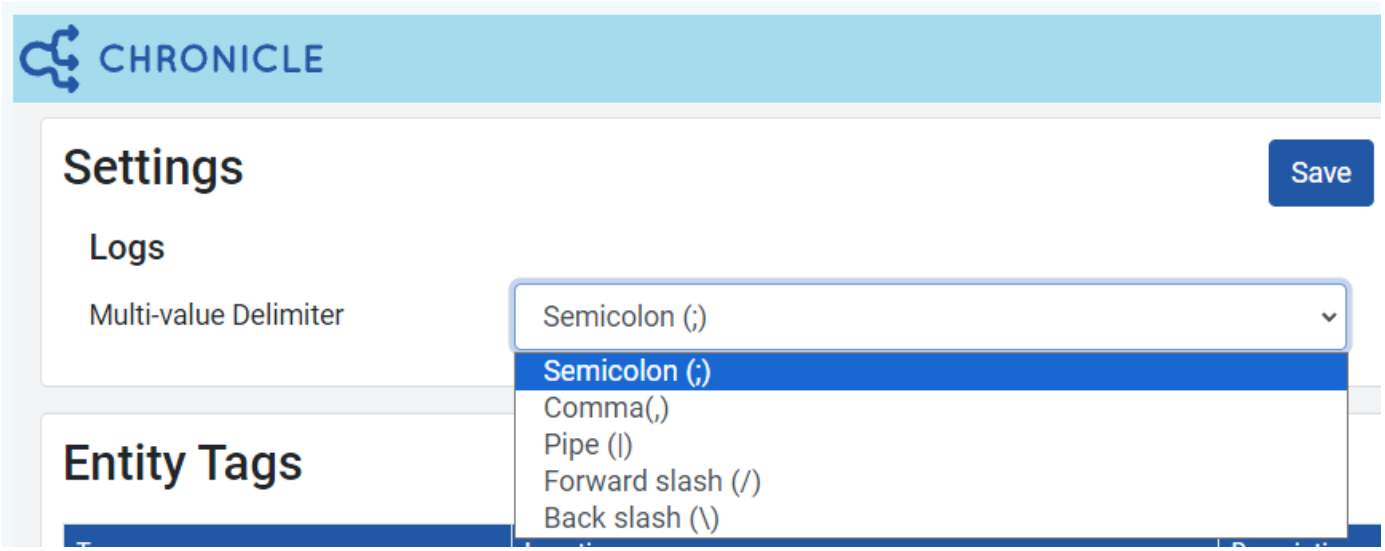
The Chronicle Settings Tab offers users the ability to customize various aspects of Chronicle. The settings are tailored to enhance the display and organization of information within the workspace. Two key features provided within this tab are the Custom Value Delimiter and Entity Tagging.

Custom Value Delimiter

This dropdown can be used to customize the delimiter between each value when displaying a multiple-choice or multiple-object field in a privilege log. The setting is unique to the workspace.

The default value is Semicolon, but users can choose between the following options:

- Semicolon
- Comma
- Pipe
- Forward slash
- Backslash



Entity tagging

Entity tagging is a simple tool for mass appending additional text to different words throughout the privilege logs in a workspace. For example, if a list of Am Law 100 lawyers is added to an entity tagging rule, all their names can have an asterisk appended throughout each privilege log automatically denoting them as a lawyer on the case.

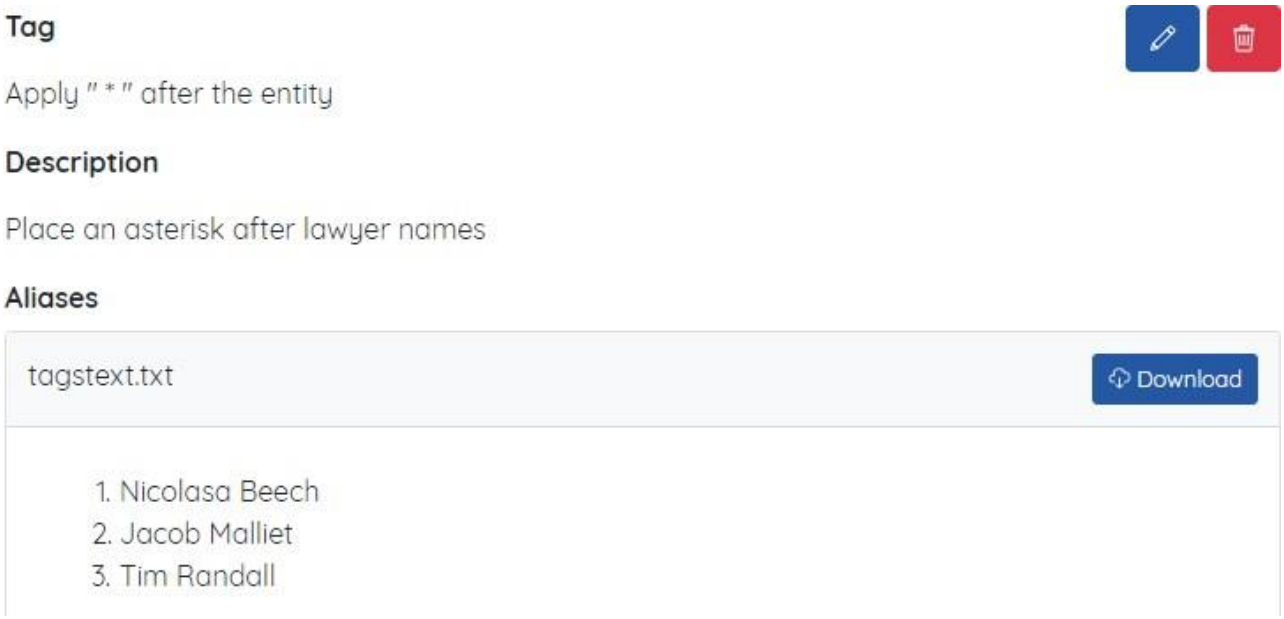
Setting up an Entity Tag

1. To create a new entity tag, a list of entities must be created. This is accomplished by creating a text document with the extension **.txt** that contains each entity on a new line.
    - The text that is included in this file will be matched exactly
    - Each entity must be on a separate line

Example:

```
jelevinson@me.com
raasdnil@gmail.com
Jeffrey
jeffrey@milyli.com
```

2. Navigate to the **Chronicle** > **Settings** tab
3. Click **New Entity Tag**
4. Enter in the tag that will be placed on the entity in text box under **'Tag'**
    - This will be the text that will be appended either before or after each entity
    - A sample of the outcome is displayed under the text box
5. Select either **Before** or **After** to the right of the tag box
    - The preview will update accordingly
6. Enter a brief description for the entity tag in the **Tag Description** box
7. Under **Alias File**, click on **Choose a file…** or **Browse** button then navigate to and select the text file created previously
8. Click **Submit** to upload the file
9. The tag will then be immediately applied to all privilege logs in the workspace
10. No Relativity field coding will be changed by this process



Entity tags can be edited or deleted at any time using the Edit and Delete icons after selecting an entity tag from the Settings tab.

Similarity Slider Instance Setting

The similarity slider can be used to adjust the matching level for the original values. To the farthest right will only show exact matches and further to the left will show less and less similar matches to the original value.

A system admin can modify the default value displayed by adjusting the instance setting, DefaultMinSimilarityPercentage.

- **Section**: Milyli.Chronicle
- **Name**: DefaultMinSimilarityPercentage
- **Type**: Int
- **Value**: 75
- **DefaultValue**: 75

Writing custom columns to Relativity

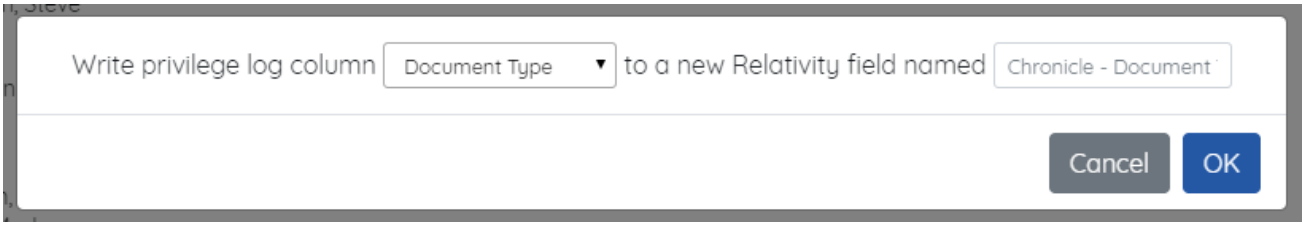
A powerful feature in Chronicle is retaining custom privilege log columns in Relativity. Often times subject matters or privilege reasons are complex concatenations of multiple fields that are built or constructed in the final version of the privilege log using functionality such as column merges in Excel.

Chronicle not only provides a great way to concatenate fields, but it also makes retaining the concatenated form of the fields indefinitely in a new Relativity document field.

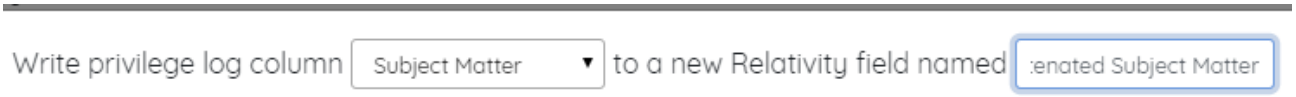
To accomplish this, the **Write Column to Field** option was added to the privilege log field.

1. Navigate to the **Chronicle** > **Privilege Logs** tab
2. Select a privilege log from the privilege log list
3. Click the **Write Column to Field** button at the top of the log

A dialogue will display asking the user to select the column and name the new Relativity field.

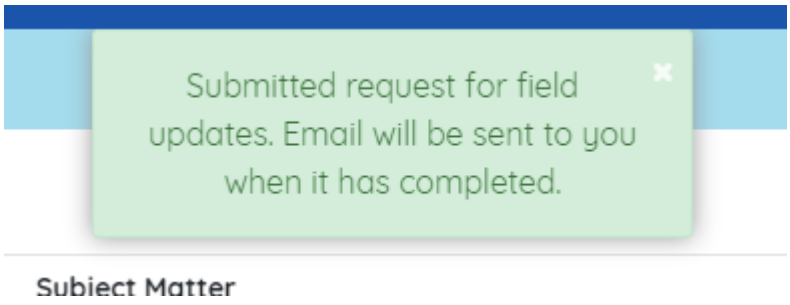


A default name is provided including the original column name and prepended by Chronicle to make it easy to identify. This can be changed to whatever the case requires.



Once the desired field name is input, click the Ok button. This operation can take a long time to complete - upwards of 30 minutes per 10,000 documents. The work will be queued with the Chronicle agent as a first in first out operation. Any additional requests will be queued behind it.

The user will be notified of this work.



After the work is completed, an email will be sent to the user who submitted the request.

About Milyli

Milyli is an eDiscovery software development firm with a broad range of experience developing products from the ground up, as well as creating custom solutions both inside and outside of the Relativity eDiscovery platform. To learn more about Milyli, take a look at our website!

https://www.milyli.com/ediscovery-technology-experts

Milyli Customer Advocacy

The Milyli Customer Advocacy team is our team dedicated to supporting you, our customer! We are here to help you make the best of the software. Whether you need help with developing a new workflow, discuss an upcoming case, or just have a question about the product, we are here to help.

Support Hours

Support is available Monday through Friday from 8:00 AM CST to 6:00 PM CST.

Support Contacts

support@milyli.com
312.265.0136