



# User Guide

v1.4 (revised December 2019)

<b>1. Installing Chronicle</b>	<b>4</b>
System requirements	4
Installing Chronicle	4
Before you begin	4
Installation	4
Licensing	4
Adding the Chronicle Agent	5
<b>2. Chronicle at a glance</b>	<b>6</b>
Product overview	6
Quick look	6
Accessing Chronicle	6
The Privilege Log Tab	6
The Privilege Log	7
Privilege log actions	8
Editing and filtering	8
The Settings Tab	8
Doc to doc privilege log preview	9
Admin Tabs	9
System Logs	9
License	9
<b>3. Creating a log</b>	<b>10</b>
Creating a template	10
Simple columns	10
Plain text	10
Relativity fields	10
Putting it together	11
Managing columns	11
Dynamic columns	12
Simple conditions	12
Advanced conditions	13
Putting it all together	14
Relativity name normalization	18
<b>4. QC and log review</b>	<b>19</b>
General review tools	19
Infinite scrolling	19

Relativity document quick nav	19
Sticky layouts	20
Filtering the privilege log	20
Putting it together	21
Editing the privilege log	22
<b>5. Early and active log review</b>	<b>26</b>
Early review scenario	26
Reviewing a document	27
Coding the document	28
<b>6. Importing and exporting templates</b>	<b>30</b>
Downloading the template	30
Importing a template	30
<b>7. Entity tagging</b>	<b>32</b>
Setting up an Entity Tag	32
<b>8. Writing custom columns to Relativity</b>	<b>34</b>

# 1. Installing Chronicle

## System requirements

- Relativity 9.6.202.10 and newer
  - Chronicle takes advantage of several APIs that are not available until Relativity 9.6.202.10.
- All browsers supported by Relativity 9.6.202.10 and newer are supported

## Installing Chronicle

### Before you begin

1. Contact [support@milyli.com](mailto: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](mailto: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 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**

## 2. Chronicle at a glance

### Product overview

Chronicle is a supplementary Relativity application designed for templating 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.

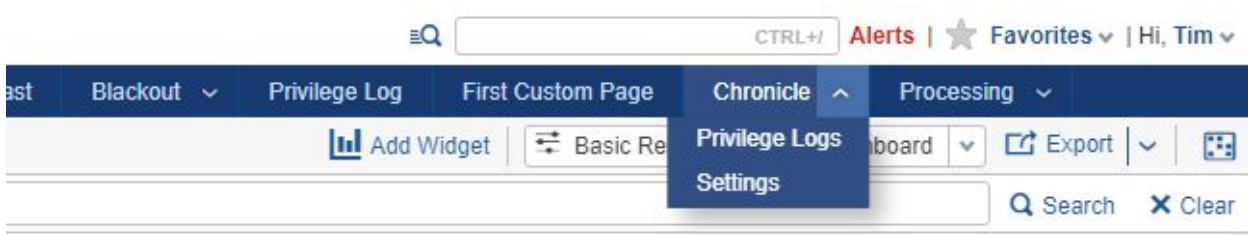
This guide will demonstrate simple workflows for implementing Chronicle with a review teams workflows and enable those teams to build and edit logs efficiently, all while maintaining the integrity of the document source.

### 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.

[New Privilege Log](#)


Name	Saved Search
<input type="text" value=""/>	<input type="text" value=""/>
Sample E-mail Collection	Chronicle Search
Jeffrey's 1st Priv. Log	Chronicle Search
Import Test	Chronicle Search



- 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 Logs Settings


 CHRONICLE a milyli product

**Sample E-mail Collection** Write Column to Field Download  



#	Date Sent	Email From	Email To	Email CC	Privilege Designation	Privilege Description	
1	10/1/2019 12:00 AM	jelevinson@me.com	emad4815@gmail.com	jeffrey@milyli.com	Attorney Client Communication	Email sent from Jeffrey to attorney concerning the sale of the business pertaining to the case.	<a href="#">Edit</a>
2	4/30/2005 11:51 AM	mlemos@acm.org	mlemos@linux.local	jeffrey@milyli.com	Attorney Client Communication	Email sent from Jeffrey to attorney concerning the sale of the business pertaining to the case.	<a href="#">Edit</a>
3	11/21/2008 7:42 AM	test@lindsaar.net	raasdnll@gmail.com	jeffrey@milyli.com	Attorney Client Communication	Email sent from Jeffrey to attorney concerning the sale of the business pertaining to the case.	<a href="#">Edit</a>
4	7/14/2009 5:18 AM	raasdnll@gmail.com	test@lindsaar.net	jeffrey@milyli.com	Attorney Client Communication	Email sent from Jeffrey to attorney concerning the sale of the business pertaining to the case.	<a href="#">Edit</a>

[▼ Create Filter](#)

## 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  **Create Filter** icon displays a form for filtering the log based on different fields on the log

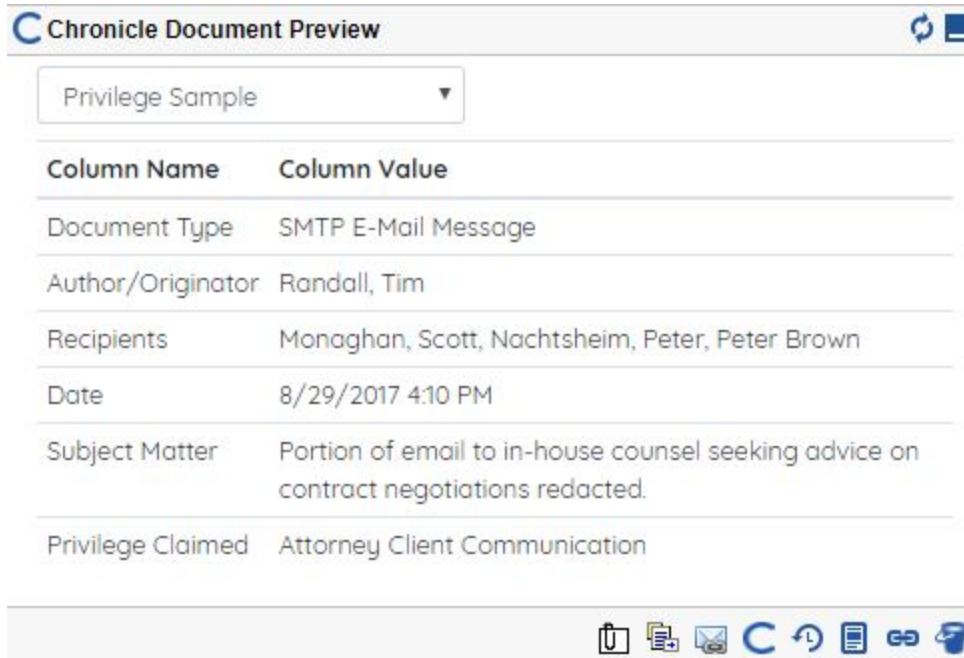
## The Settings Tab

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.



## Doc to doc privilege log preview

Chronicle takes advantage of a custom document viewer pane that provides a preview of the privilege log entry for the current document based on the coding of that document. When coding the fields of the document, the pane can be refreshed to get a live preview of how the document will appear on the log. The pane can be accessed by clicking the  pane icon.



The screenshot shows the 'Chronicle Document Preview' interface. At the top, there is a title bar with the Chronicle logo and a refresh icon. Below the title bar is a dropdown menu currently set to 'Privilege Sample'. The main area contains a table with two columns: 'Column Name' and 'Column Value'. The table lists the following information:


Column Name	Column Value
Document Type	SMTP E-Mail Message
Author/Originator	Randall, Tim
Recipients	Monaghan, Scott, Nachtsheim, Peter, Peter Brown
Date	8/29/2017 4:10 PM
Subject Matter	Portion of email to in-house counsel seeking advice on contract negotiations redacted.
Privilege Claimed	Attorney Client Communication

At the bottom of the pane, there is a toolbar with several icons: a clipboard, a document with a plus sign, an envelope, the Chronicle logo, a refresh icon, a document with a checkmark, a double-headed arrow, and a trash can.

## 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 help 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 license key can be applied. This is where general information can also be found if a license has already been applied.

## 3. 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.



Name

Outcome

#### 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.

Name

Outcome

### Putting it together

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




Name

Outcome

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.

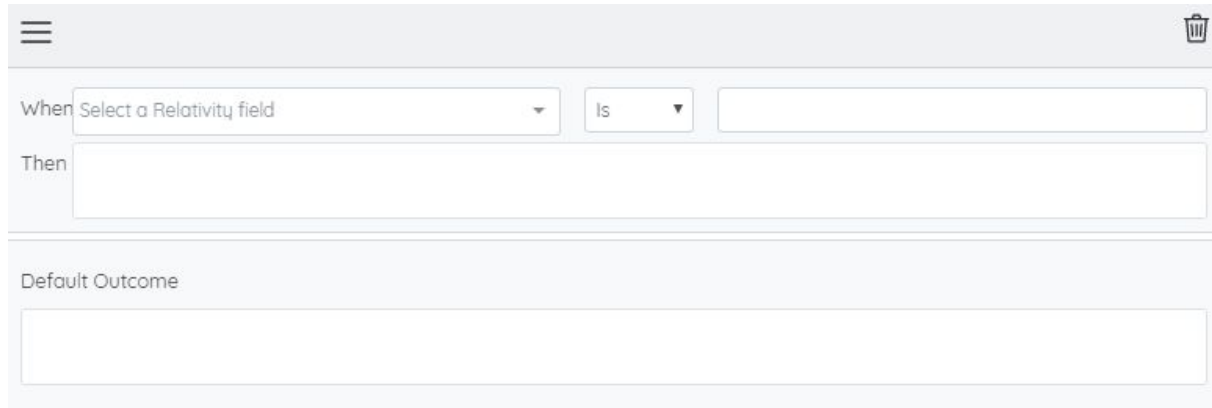
### Managing columns

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

	Adds an additional column
	Removes additional columns down to a minimum of one 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 follow a “When **X** is **Y** then **Z**” statement pattern. To add this type of outcome, click the **Add Outcome** button.



<b>When</b>	The Relativity field that will be evaluated for the outcome
<b>Is / Is Not</b>	The comparator for the field
<b>Value (blank box)</b>	The value that will be compared to
<b>Then</b>	The conditional outcome constructed just like the outcome of a simple column
<b>Default Outcome</b>	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.

When	Responsive Designation	x	Is	Responsive
And	Select a Relativity field		Is	
Then	This document is named {{File Name}} and is responsive.			
Default Outcome				
This document is named {{File Name}} and is not responsive				

### 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 image displays two screenshots of a search rule configuration interface. Each screenshot shows a rule with multiple conditions and a corresponding outcome.

**Top Screenshot:**

- When:** Responsive Designation (dropdown) is (operator) Responsive (dropdown)
- And:** Privilege Designation (dropdown) is (operator) Attorney Client Communication (dropdown)
- And:** Select a Relativity field (dropdown) is (operator) (empty dropdown)
- Then:** This document is privileged due to attorney client communication.

**Bottom Screenshot:**

- When:** Responsive Designation (dropdown) is not (operator) Responsive (dropdown)
- And:** Privilege Designation (dropdown) is (operator) Attorney Client Communication (dropdown)
- And:** Select a Relativity field (dropdown) is (operator) (empty dropdown)
- Then:** This document is not responsive but has been flagged as privileged in some way.

e.g. type {{Artifact ID}} to add the Artifact ID field

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 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

Name

Saved Search

## Columns

### *Document Type*

Name

Outcome

Add Outcome

### *Author/Originator*

Name

Outcome

Add Outcome

### *Recipients*

Name

Outcome

Add Outcome

### *Date*

Name

Date

Outcome

Add Outcome

{{Date Sent}}

### Subject Matter

Name

Subject Matter

Outcomes

Add Outcome

☰ 🗑️

When Custom Subject Matter × ▾ Is ▾

And Select a Relativity field ▾ Is ▾

Then {{Subject Matter Prefix}} {{Subject Matter Suffix}}

---

Default Outcome

### Privilege Claimed

Name

Privilege Claimed

Outcome

Add Outcome

{{Privilege Designation}}




## 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

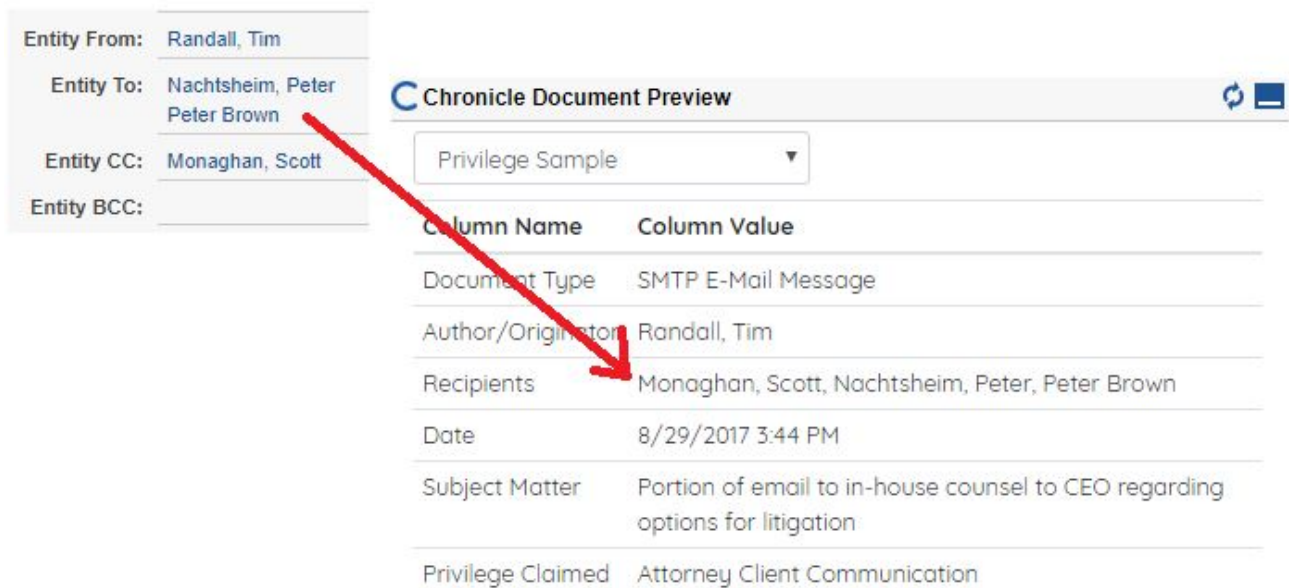
Chronicle has been optimized to work with Relativity's name normalization. After running Relativity's name normalization and cleaning up entities to the quality required by the case, several fields will be populated by Relativity analytics as a result. Both Alias fields and Entity fields can be used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

Entity From:	Randall, Tim
Entity To:	Nachtsheim, Peter Peter Brown
Entity CC:	Monaghan, Scott
Entity BCC:	

Column Name	Column Value
Document Type	SMTP E-Mail Message
Author/Originator	Randall, Tim
Recipients	Monaghan, Scott, Nachtsheim, Peter, Peter Brown
Date	8/29/2017 3:44 PM
Subject Matter	Portion of email to in-house counsel to CEO regarding options for litigation
Privilege Claimed	Attorney Client Communication



## 4. 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 of 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.

### Privilege Sample

#	Docume... Type	Author/Origina...	Recipients	Date	Subject Matter
<a href="#">106</a>	SMTP E-Mail Message	Randall, Tim	Kinnan, Charles, Nachtsheim, Peter	10/18/2017 4:01 PM	Email to outside counsel pert liquidation of the business
<a href="#">107</a>	SMTP E-Mail Message	Randall, Tim	Nachtsheim, Peter	10/10/2017 1:09 PM	Email to outside counsel pert liquidation of the business
<a href="#">108</a>	SMTP E-Mail Message	Randall, Tim	Kristy Sullivan	2/25/2019 5:21 PM	Email to in-house counsel see
<a href="#">109</a>	SMTP E-Mail Message	Randall, Tim	Kristy Sullivan	2/25/2019 5:17 PM	Email to in-house counsel see

▼ Create Filter

### Relativity document quick nav

Each document on 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 the review 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.

Document Type	Author/Originator	Recipients	Date
Message			

Document Type	Author/Originator	Recipients	Date
---------------	-------------------	------------	------

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



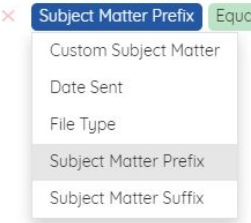
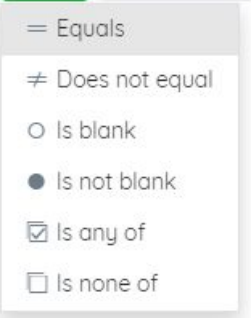
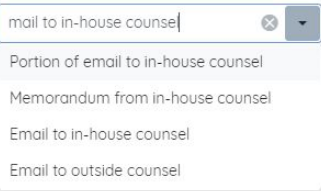
A filter can be applied to quickly reduce the reviewable set of the log. This can be used to review just specific rows, or, more importantly, filter the privilege log down to a set of documents that need to be corrected.

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.

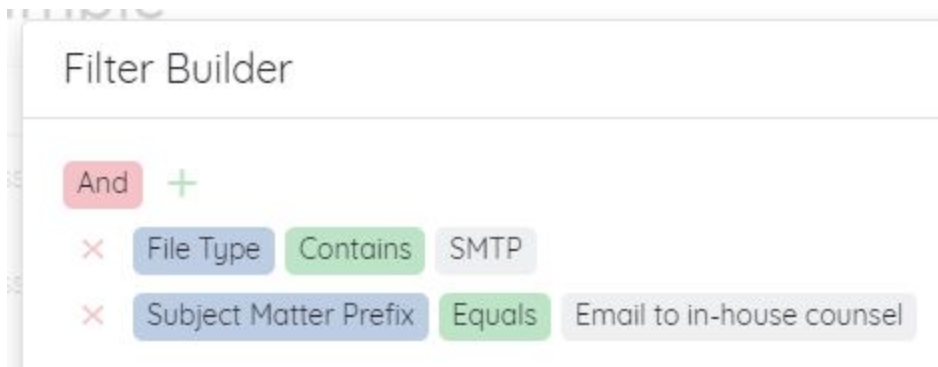
A filter builder screen will be displayed that provides a similar filtering complexity to a Relativity saved search.

And	Indicates that the row must meet this condition
-----	---

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

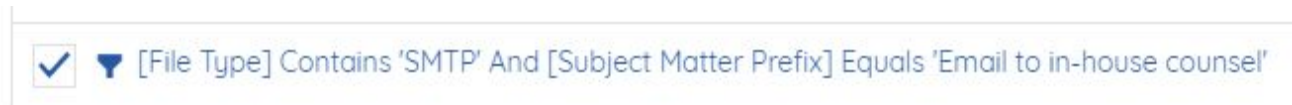
### Putting it together

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.



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.

Subject Matter	Privilege Claimed	<a href="#">Edit</a>
Email to in-house counsel seeking advice on contract negotiations redacted.	Attorney Client Communication	

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.

## Subject Matter

Custom Subject Matter:	Custom text input instead
Subject Matter Prefix:	Email to in-house counsel
Subject Matter Suffix:	seeking advice on contract negotiations redacted.


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.

Subject Matter	Privilege Claimed	
Custom text input instead	Attorney Client Communication	<a href="#">Edit</a>

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.





Date Sent: 10/24/2018, 1:43 PM 

< **OCTOBER 2018** >

SUN	MON	TUE	WED	THU	FRI	SAT
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	<b>24</b>	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

Today



01 : 43 

OK Cancel

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**.

## 5. Early and active log review

After a template is created, there is no requirement to have all of 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 its 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: <ul style="list-style-type: none"><li>• Subject Matter Prefix (Custom Single Choice Field)</li><li>• Subject Matter Suffix (Custom Single Choice Field)</li><li>• Custom Subject Matter (Customer Text Field)</li></ul>
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.

Default Category	
Control Number:	milyli_0000020958
File Type:	SMTP E-Mail Message
Entity From:	Randall, Tim
Entity To:	Monaghan, Scott Nachtsheim, Peter Peter Brown
Entity CC:	
Entity BCC:	
Responsive Designation:	Responsive
Confidential Designation:	Attorneys' Eyes Only
Privilege Designation:	
Subject Matter Prefix:	
Subject Matter Suffix:	
Custom Subject Matter:	

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

Privilege Sample ▾

Column Name	Column Value
Document Type	SMTP E-Mail Message
Author/Originator	Randall, Tim
Recipients	Monaghan, Scott, Nachtsheim, Peter, Peter Brown
Date	8/29/2017 4:10 PM
Subject Matter	
Privilege Claimed	

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.

**Privilege Designation:**  Attorney Client Communication  
 Attorney Work Product  
[Manage](#)

**Subject Matter Prefix:**  [Manage](#)

**Subject Matter Suffix:**  [Manage](#)

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

Chronicle Document Preview 	
Privilege Sample ▼	
Column Name	Column Value
Document Type	SMTP E-Mail Message
Author/Originator	Randall, Tim
Recipients	Monaghan, Scott, Nachtsheim, Peter, Peter Brown
Date	8/29/2017 4:10 PM
Subject Matter	Portion of email to in-house counsel to CEO regarding decisions for upcoming litigation
Privilege Claimed	Attorney Client Communication

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.

## 6. Importing and exporting templates

After creating a privilege log, a template can be downloaded that contains all of 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
  - o 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*

Name

Privilege log name is required

Saved Search

Saved search is required

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

Outcome

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

When	<input type="text" value="Select a Relativity field"/>
	Relativity field is required
Then	<input type="text" value="{{Subject Matter Prefix}} {{Subject Matter Suffix}}"/>

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

## 7. 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 of 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.
  - o The text that is included in this file will be matched exactly
  - o 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'**
  - o This will be the text that will be appended either before or after each entity
  - o A sample of the outcome is displayed under the text box
5. Select either **Before** or **After** to the right of the tag box
  - o 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



## Tag



Apply "\*" after the entity

## Description

Place an asterisk after lawyer names

## Aliases

tagstext.txt	<a href="#">Download</a>
<ol style="list-style-type: none"><li>1. Nicolasa Beech</li><li>2. Jacob Malliet</li><li>3. Tim Randall</li></ol>	

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.

## 8. Writing custom columns to Relativity

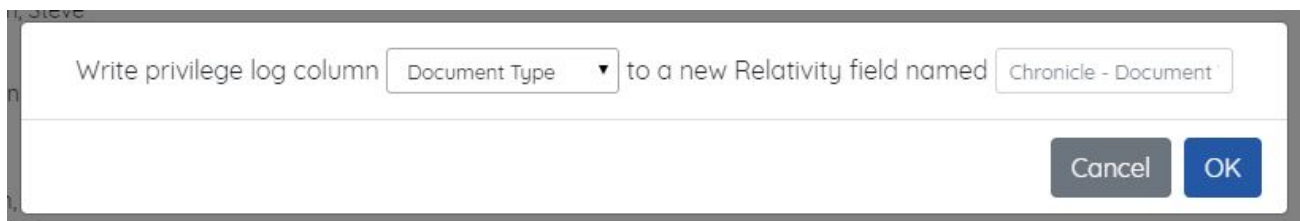
A powerful feature in Chronicle is retaining custom privilege log columns in Relativity. Often times subject matters or privilege reasons are complex concatenations of multiple fields that are built or constructed in the final version of the privilege log using functionality such as column merges in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

Chronicle not only provides a great way to concatenate fields, 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

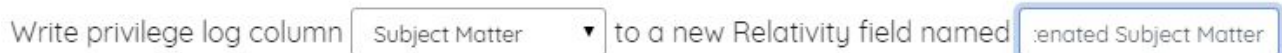
A dialogue will display asking the user to select the column and name the new Relativity field.



Write privilege log column  to a new Relativity field named

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 required.

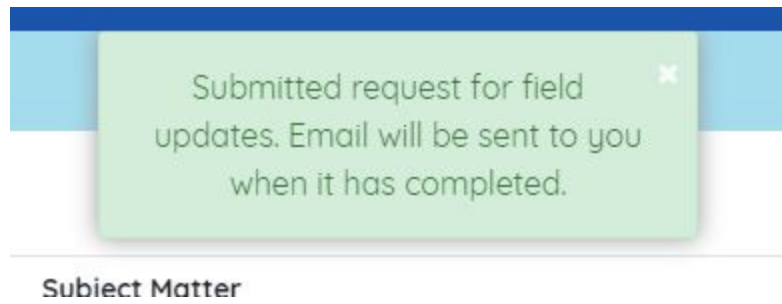
---



Write privilege log column  to a new Relativity field named

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](mailto:support@milyli.com)  
312.265.0136

a **milyli** product