



*Powering exceptional legal teams worldwide.*



# Today's eDiscovery Workflow Challenges



Unclear project instructions.

Wasted time creating duplicative data entries.

Inability to view, track, and edit task assignments.

Inadequate reporting on team productivity and performance.



A photograph of four women in an office setting. In the foreground, a woman with glasses and a floral shirt is smiling and looking towards the right. Behind her, another woman in a blue top is looking at a laptop. In the background, two more women are standing and looking at a laptop. The office has yellow cubicle walls and large windows.

# Keep your team on track and in sync

- ▶ Analysts/Technicians
- ▶ Project Managers
- ▶ Case Teams
- ▶ Department Directors



# Analysts & Technicians

## Receive and update tasks

- ▶ Check out tasks from the dashboard.
- ▶ Collaborate with team members through the AB Communications Suite.
- ▶ Log media, volumes, notes and billing in one place.





# Project Managers

## Apply workflows and track progress

- ▶ Create and apply custom project workflows.
- ▶ Assign tasks and track project status and progress.
- ▶ Communicate with requesters through AB Communications.





# Case Teams

## Submit and track requests

- ▶ Submit requests by email or through Request Portal.
- ▶ Track progress of requests in Agility Blue Dashboard.
- ▶ Communicate with project managers and receive automatic notifications from Agility Blue.





# Department Directors

## Analyze trends and productivity

- ▶ Analyze project history and data through AB Insights.
- ▶ Receive real-time reports on team productivity.
- ▶ Leverage Agility Blue REST API to connect multiple software applications.





# The Agility Blue Platform



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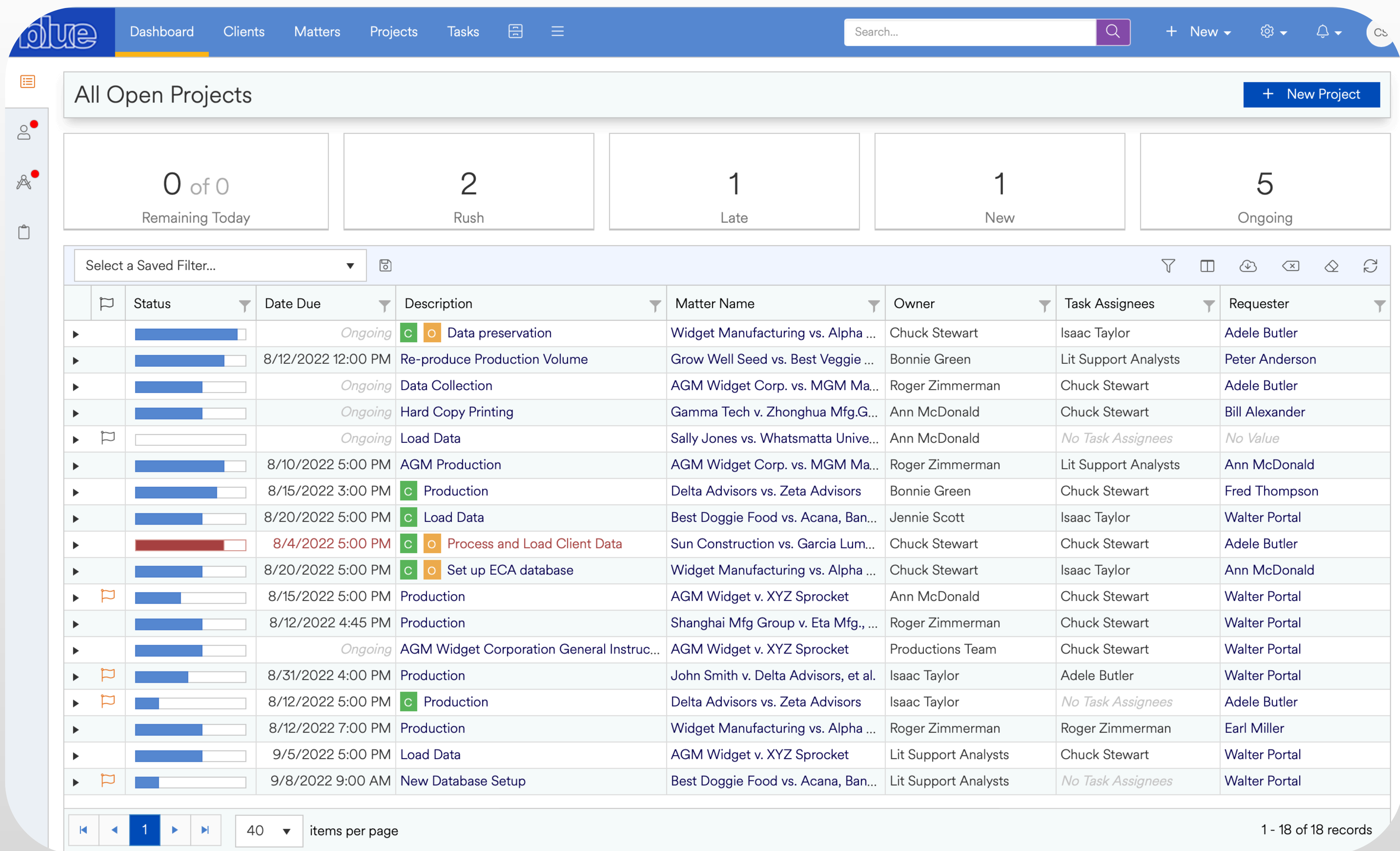
# Dashboards

- ▶ View your team's work-in-progress in real time through dynamic dashboards.
- ▶ Customize dashboard views for your role and preferences.
- ▶ Search, filter, and edit your tasks directly from your dashboard.





# Agility Blue Dashboards



Search, filter, and edit projects directly from the dashboard.



# Agility Blue Dashboards

blue

Dashboard

Clients

Matters

Projects

Tasks

Search...

Q

+ New

CS

Open Tasks

Refresh

New5 tasks

Production

Delta Advisors (2021)

Delta Advisors vs. Zeta Advisors (2021-0021)

2022070000006

# 1122

8/12/2022 5:00 PM

IT

AB

0

Production

AGM Widget Corporation (1024)

AGM Widget v. XYZ Sprocket (1024-0004)

2022030000006

# 1095

8/15/2022 5:00 PM

AM

WP

0

Production

Delta Advisors (2021)

John Smith v. Delta Advisors, et al. (2021-0002)

2022060000013

# 1115

8/31/2022 4:00 PM

IT

WP

0

New Database Setup

Acana, Baneful, and Canine, LLC (1002)

Best Doggie Food vs. Acana, Baneful and Canine, LLC (1002-0789)

2022080000003

# 1127

9/8/2022 9:00 AM

WP

0

In Progress16 tasks

Process Data

Garcia Lumber (6001)

Sun Construction vs. Garcia Lumber (6001-3456)

2022030000004

# 1068

8/4/2022 5:00 PM

CS

CS

AB

2

Production

AGM Widget Corporation (1024)

AGM Widget Corp. vs. MGM Manufacturing Inc. (1024-0002)

2021120000007

# 1044

8/10/2022 5:00 PM

LS

RZ

AM

2

Re-produce Production Volume

Grow Well Seed Co. (5003)

Grow Well Seed vs. Best Veggie Seed Co. (5003-0002)

2020120000003

# 858

8/12/2022 12:00 PM

LS

BG

PA

6

Production

Eta Manufacturing, Inc (4015)

Shanghai Mfg Group v. Eta Mfg., Inc (4015-0003)

2022060000001

# 1033

8/12/2022 1:15 PM

CS

RZ

WP

1

Completed Today4 tasks

Create permissions groups

AGM Widget Corporation (1024)

AGM Widget Corp. vs. MGM Manufacturing Inc. (1024-0002)

2022060000006

# 1102

6/30/2022 5:00 PM

BG

CS

0

Production

Delta Advisors (2021)

Delta Advisors vs. Zeta Advisors (2021-0021)

2022060000002

# 1094

7/28/2022 7:00 PM

CS

CS

AB

2

Set up review database

Widget Manufacturing (9004)

Widget Manufacturing vs. Alpha Manufacturing (9004-0001)

2021100000005

# 1012

7/29/2022 5:00 PM

LS

CS

AM

0

Data Collection

Delta Advisors (2021)

Delta Advisors vs. Zeta Advisors (2021-0021)

2022040000001

# 1071

7/29/2022 5:00 PM

CS

AM

WP

2

View real-time task status from the task board.



# Workflows

- ▶ Streamline workflows with custom project templates and task forms.
- ▶ Record and track volumes, media, billing, and notes in one platform.
- ▶ Leverage Agility Blue's REST API to communicate with other software you use.





# Agility Blue Workflows

Form: Production

## Production Instructions

Data to Produce \* ?

Produce = YES

Beginning Production Number \* ?

Next Available

Confidentiality Designation \* ?

All "Confidential"

Production Format \* ⚡

Use Matter-level ESI Protocol

⚠

If "Custom ESI Protocol" is selected, please add the metadata fields to additional instructions, or attach here.

ESI Protocol

🗑 Standard ESI Protocol

+ Add...

⊖ Remove...

↺ Replace...

🗑 Clear

ℹ

Select which ESI should be used for this production. If the protocol is not found in the list, please fill out the metadata fields, below.

Deliverable Recipients ?

Format ▼

**B**

*I*

abc

Insert ▼

[ ]

Cale Munro <cmunro@sadiebluesoftware.com>  
Bert Tester <btester@sadiebluesoftware.com>  
Bruce Ward <bward@sadiebluesoftware.com>

Create projects and tasks on the fly, and apply custom forms and templates to streamline workflows.



# Agility Blue Workflows

Hello, Walter

## Choose a Request

Filter request types...

### Analog Services

- Hard Copy Printing
- Hard Copy Scanning

### Database Setup

- New Database Setup
- User Setup

### Digital Forensics

- Data Collection

### Document Review

- Keyword Search
- Review Instructions

### Processing/Import

- Load Data

### Productions

- Production

## Open Requests

Refresh

	Id	Status	Request	Matter	Due	
≡	916	In Progress	Hard Copy Printing	5001.0076 - Gamma Tech v. Zhonghua Mfg.Group	Ongoing	CS
≡	917	On Hold	New Database Setup	2016-0345 - Boulder Construction vs. Alpha Bank SSB	in a day	CS
≡	921	In Progress	Data Collection	1040.0002 - National Fencing v. Epsilon Construction, et al.	in 2 months	BG
≡	931	In Progress	Load Data	0145-2015 - New Gadgets LLC vs. Newer Gadgets LLP	in 6 hours	CS
≡	979	In Progress	Production	1002-0021 - Delta Advisors vs. Zeta Advisors	in 9 days	CS
≡	981	New	Production	1002-0021 - Delta Advisors vs. Zeta Advisors	Ongoing	
≡	982	In Progress	Production	1023.0002 - John Smith v. Delta Advisors, et al.	in 9 days	BG
≡	985	New	Data Collection	2016-0025 - AGM Widget Corp. vs. MGM Manufacturing Inc.	in a day	

## Recent Requests

	Id	Status	Request	Matter	Due	
≡	917	On Hold	New Database Setup	2016-0345 - Boulder Construction vs. Alpha Bank SSB	in a day	CS
	918	Canceled	Keyword Search	2016-0025 - AGM Widget Corp. vs. MGM Manufacturing Inc.	in 4 days	JS
≡	921	In Progress	Data Collection	1040.0002 - National Fencing v. Epsilon Construction, et al.	in 2 months	BG
≡	931	In Progress	Load Data	0145-2015 - New Gadgets LLC vs. Newer Gadgets LLP	in 6 hours	CS
	940	Completed	Production	1023.0002 - John Smith v. Delta Advisors, et al.	in 8 days	JS
	951	Canceled	Production	0002 - AGM Widget v. XYZ Sprocket	17 days ago	

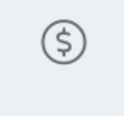
Let case teams submit and track their requests through the Request Portal.



# Agility Blue Workflows

## Re-produce Production Volume

← Projects > Grow Well Seed Co. (5003) Grow Well Seed vs. Best Veggie Seed Co. (5003-0002)



Verified Image Count and Format	Yes
Verified Metadata against ESI Protocol	Yes
Notes/Comments	Missing Date Sent metadata. Metadata fields added and re-verified against ESI Protocol - OK to export.

6 2 1 15 5 1

Volumes

# P010 GWS00001 - GWS09300 +1

Volume Details

Date	4/13/2021
Documents	2,500
Pages	5,100
Natives	50
Processing Size (GB)	1.25
Notes	This is a re-production of volume P001, to fix confidentiality endorsements.

Show Less...

Created by Chuck Stewart 4/13/2021 8:13 AM

Last updated by Chuck Stewart 8/8/2022 1:40 PM

Record and track volumes, media, billing, and notes in one central location.



# Communications

- ▶ Your central hub for communications on projects.
- ▶ Email into Agility Blue to create new project requests.
- ▶ Notification system keeps team members updated on progress and updates in real time.





# Communications

## Re-produce Production Volume

Projects

Grow Well Seed Co. (5003)

Grow Well Seed vs. Best Veggie Seed Co. (5003-0002)

Verified Image Count and Format

Yes

Verified Metadata against ESI Protocol

Yes

Notes/Comments

Missing Date Sent metadata.  
Metadata fields added and re-verified against ESI Protocol - OK to export.

6

2

1

15

5

1

Comments

CS

Chuck Stewart

Blocking

4/13/2021 8:09 AM

Please confirm that families should be produced together. @Adele

↩

✎

🗑

AB

Adele Butler

External

4/13/2021 8:11 AM

^ Show Metadata...

Yes: please keep families together in this production.

↩

✎

🗑

CS

Chuck Stewart

4/13/2021 8:12 AM

Ok to proceed per Adele's instructions.

↩

✎

🗑

CS

Chuck Stewart

Blocking

5/18/2021 12:12 PM

Need to confirm that production ID should begin with the same as original, or new prodno. @Adele

↩

✎

🗑


Keep all team members informed with automated notifications.

Manage project team notifications for actions and status changes.

Control and automate email notifications to project stakeholders.



# Communications

 New Task Comment: Production (SBS)

AB

Agility Blue <notify@sadiebluesoftware.com>

blegatt@sadiebluesoftware.com

Tuesday, August 27, 2019 at 11:23 AM

Show Details

Task Comment: Question

Blocking?

QC Related?

External?

Comment

Yes

No

No

@Benjamin : Please provide update on privilege review status.

Task: Production (SBS)

Status

Created By

Due

Assigned To

On Hold

Benjamin Legatt

No Value

Chuck Schulz

Production Instructions

Data to Produce

Beginning Production Number

Confidentiality Designation

Production Format

Deliverable

Deliverable Recipient(s)

Further Instructions

Saved Search: Production Search 2

Next Available

All "Highly Confidential"

See Matter-level ESI Protocol

Internal FTP

Ben Legatt ; Bert Tester ; Brandon Ward ; Bruce Ward

This is a large production, so let Ben know if we will be able to meet the deadline!

Project: Production

Project Id

Status

Requester

Priority

Client

Client Ref

Matter

Matter Ref

[2019060000004](#)

Open

Ann McDonald

Rush

[AGM Widget Corporation](#)

1024

[AGM Widget Corp. vs. MGM Manufacturing Inc.](#)

2016-0025

Respond to notifications and comments in the app or via email.

All communications and history are stored with its related task.

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# Reporting

- ▶ Get insights into statistics on projects, matters, and clients.
- ▶ Create custom interactive reports on any data tracked in Agility Blue.
- ▶ Export reports and subscribe to receive automatically.





# Agility Blue Reporting

Agility Blue - Quarterly Activity Report

## Quarterly Activity

### Top 5 Most Active Matters

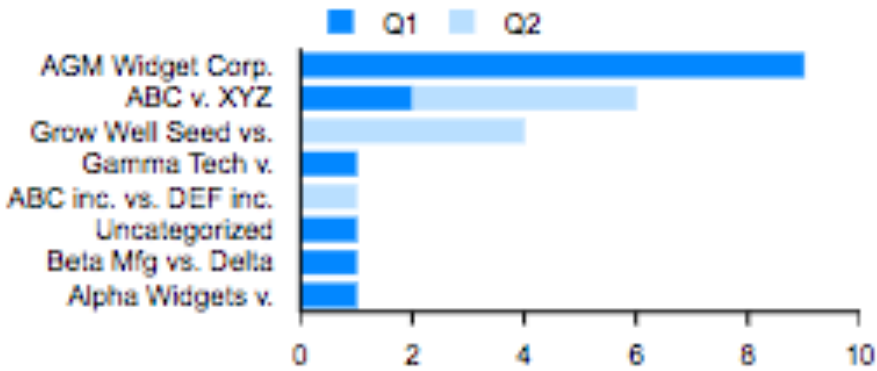
#### Tasks Created

Matter	Q1	Q2	Total
AGM Widget Corp. vs. MGM Manufacturing Inc.	9	0	9
ABC v. XYZ	2	4	6
Grow Well Seed vs. Ultimate Grower	0	4	4
ABC inc. vs. DEF inc.	0	1	1
Alpha Widgets v. Alpha Gadgets	1	0	1
Uncategorized	1	0	1
Beta Mfg vs. Delta Widgets	1	0	1
Gamma Tech v. Zhonghua Mfg.Group	1	0	1

#### Task Distribution



#### Quarterly Task Distribution



### Top 5 Most Assigned To Users

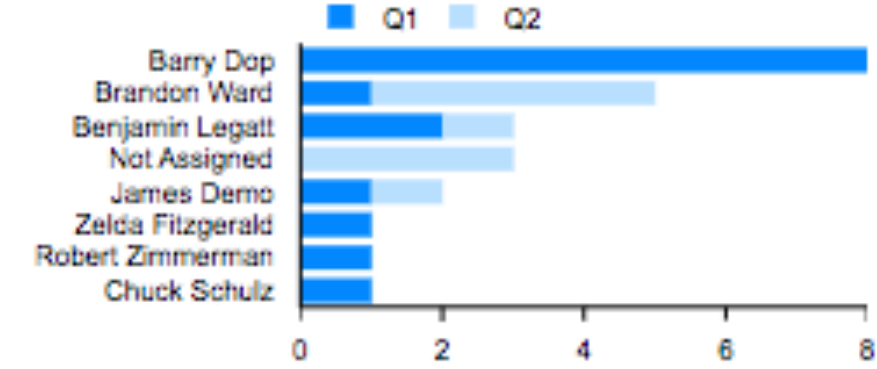
#### Tasks Assigned To

User	Q1	Q2	Total
Barry Dop	8	0	8
Brandon Ward	1	4	5
Not Assigned	0	3	3
Benjamin Legatt	2	1	3
James Demo	1	1	2
Robert Zimmerman	1	0	1
Chuck Schulz	1	0	1
Zelda Fitzgerald	1	0	1

#### Task Distribution



#### Quarterly Task Distribution

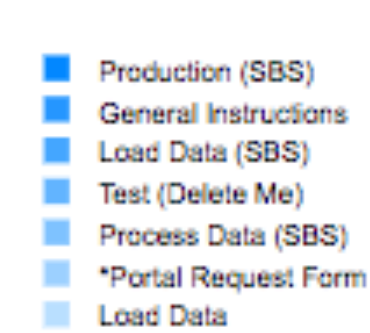


### Top 5 Most Active Forms

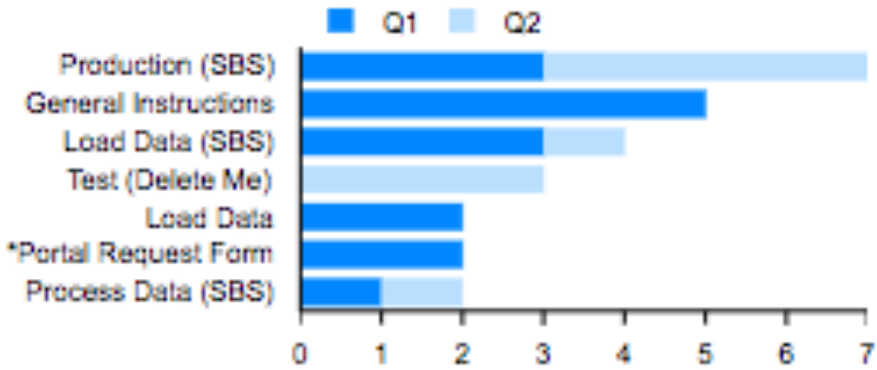
#### Forms Used

Form	Q1	Q2	Total
Production (SBS)	3	4	7
General Instructions	5	0	5
Load Data (SBS)	3	1	4
Test (Delete Me)	0	3	3
Process Data (SBS)	1	1	2
*Portal Request Form	2	0	2
Load Data	2	0	2

#### Form Distribution



#### Quarterly Form Distribution



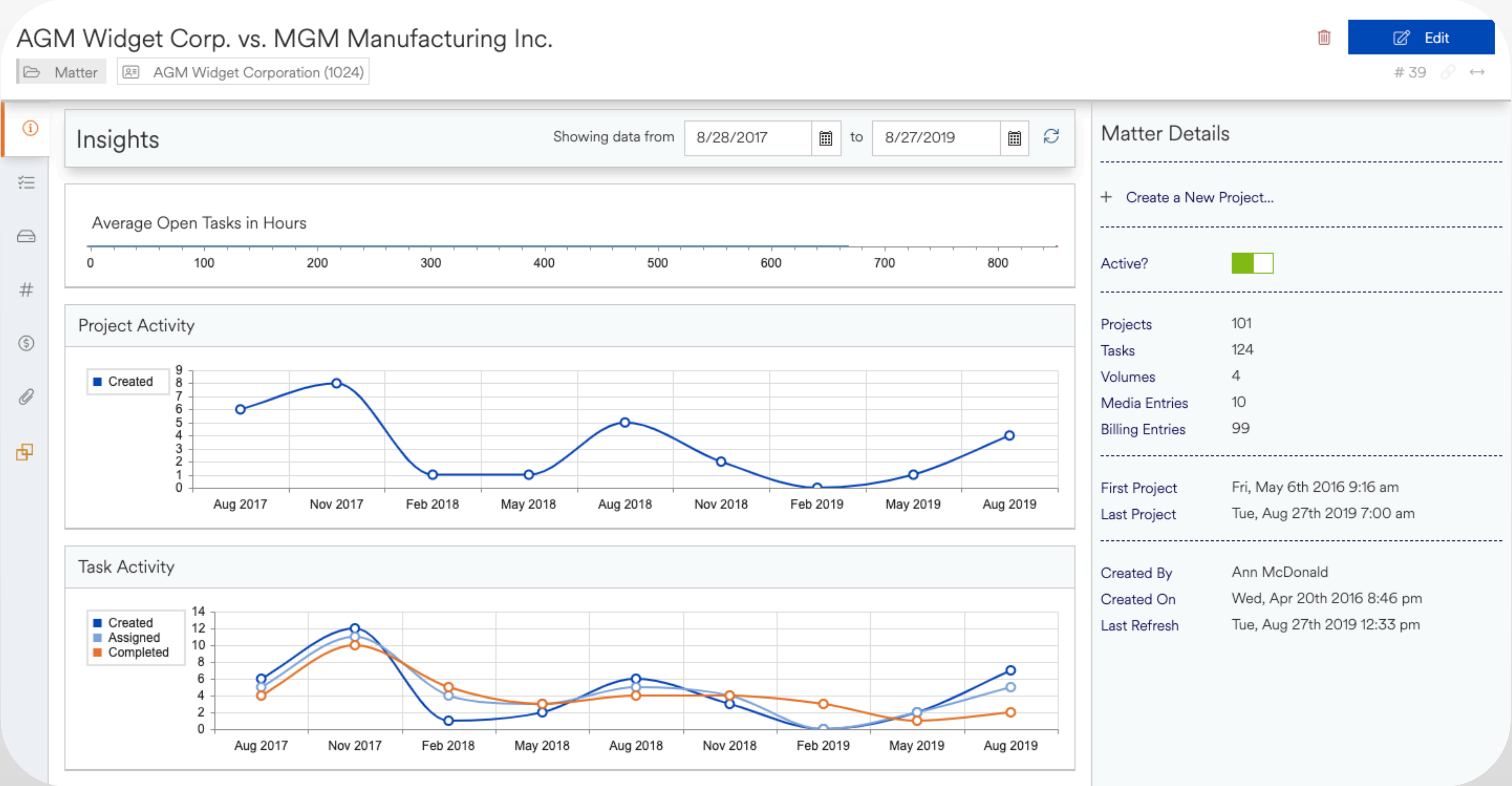
Create custom reports on any data in your workspace.

Apply filters and edit parameters from the Report details page.

Click to print reports or export to one of several available file formats.



# Agility Blue Reporting



Get detailed insights into project history and activity immediately.

Click to access all associated objects and attachments.

Edit matter information and assignments from the Details page.



# Agility Blue Reporting

AGM Widget Corp. vs. MGM Manufacturing Inc.

Matter

AGM Widget Corporation (1024)

Relativity

WorkspacesProductions

Linked Workspaces

Filter...

Link a Workspace

AGM Widget Corp. vs. MGM Manufacturing Inc.

Most Recent Statistics as of 5/28/2019 5:49 am

Workspace Created On8/1/2017 5:40 pm

Workspace StatusActive

Eca Application Installed?No

Workspace Version9.5.196.102

2,473Documents

2,527Files

203.65 MbFile Size

4Active Users

4.88 KbFull-Text Size

232.75 MbDatabase Size

640.50 MbLog Size

NoData Grid Enabled?

Linked By Service Account 10 months ago

Use Agility Blue’s API to link with other key software platforms, including Relativity® workspaces.



*Powering some of the most exceptional teams worldwide:*







*Powering exceptional legal teams worldwide.*