

Automated Workflows

Automated workflows in RelativityOne enable you to take advantage of out-of-the-box automation found only in the cloud to maximize efficiency and reduce human error—all while gaining valuable time back that you can reallocate to strategic, valuable activities. Automated workflows are a set of triggers and actions—flexible to your processes—that help you get data into your team’s hands faster and with increased accuracy. Plus, they can be templated so that new workspaces begin automating immediately.

Get Value Right Away



Get to review sooner.

Start reviewing the most important documents in your case faster by automating manual tasks, and jumpstart your path to AI-powered insights.



Stop babysitting.

Spend more time on activities that move your business forward instead of time-consuming administrative processes or monitoring the software.



Eliminate human error.

Remove the human component of critical activities, such as updating indexes or processing documents, and be confident your data is accurate.



Decrease administrative overhead.

Run your business more efficiently by automating manual tasks and reducing time spent waiting for processes to complete.

The screenshot displays the 'Automated Workflows' configuration page in RelativityOne. The breadcrumb trail is 'Admin > Automated Workflows'. The page title is 'Smith Co. v City of Chicago'. The workflow is named 'Update Structured Analytics with New Documents' and is active. Its description is 'When new documents are added to the case, run key Structured Analytics operations.' The workflow is ready to run and has two recent runs, both completed on 4/16/2021. The first run used the 'Email Threading & Near Duplicate Detection' set and completed at 4:59 PM. The second run used the 'Language ID' set and completed at 5:10 PM. The interface includes a sidebar with navigation icons, a top navigation bar with tabs like 'Audit', 'Automated Workflows', 'Entities', etc., and a main content area with workflow details and a 'Ready to Run' section.

How It Works

Out-of-the-Box Automation

Automated workflows are ready to go at the click of a button whenever you begin the case setup process, and they're integrated in our templates so that you're leveraging workflow best practices from day one. If you're an organization with very specific requirements, don't worry—they're also completely customizable, so you can tailor the experience for your teams.

New Documents Added

Once new documents are added to your workspace, automated workflows complete the key actions that you would normally have to do yourself.

Streamline Critical Processes

Structured Analytics

RelativityOne can run sets such as email threading, language identification, near-duplicate detection, repeated content identification, and name normalization without any action required from you.

Conceptual Analytics

RelativityOne can auto-update your cluster visualizations as you import new data.

PRO TIP: *If you run a Structured Analytics action with repeated content identification before running your Conceptual Analytics index action, Relativity will automatically link the top repeated content filters to your index, improving the quality of your content.*

Search

Allow RelativityOne to automate searching tasks, so you don't have to update and babysit your dtSearch index builds and search terms reports.

Scheduled Runs

Workflows run on a reoccurring schedule—weekly, daily, or even hourly—so you can further automate manual tasks. To make it easier, times are displayed based on your local time preference.

Action Completion

Immediately kick off a new workflow after the completion of any supported action to create a sequence of workflows that help automate key tasks.

Imaging

Automatically run an imaging set or multiple imaging sets with your desired triggers.

PRO TIP: *Using scheduled run, you can set up an automated workflow that images responsive documents on a nightly recurrence. This will save you time when it's time to start wrapping up your case.*

OCR

Automatically run an OCR set or multiple OCR sets with your desired triggers.

PRO TIP: *Sequence the OCR action with the imaging action to automatically populate missing extracted text before your index build. If you have a lot of unstructured data that could be missing searchable text, this sequence will save you time you would usually spend manually QCing.*

Want to get started with Automated Workflows?

[Schedule a demo.](#)



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