

# Clearwell eDiscovery Platform™

## Data Sheet: Archiving and eDiscovery

The Clearwell eDiscovery Platform™ is the leading enterprise eDiscovery solution that enables enterprises, governments, and law firms to manage legal, regulatory, and investigative matters using a single application. The Clearwell Platform was purpose-built for eDiscovery, making it easy for organizations to defensibly solve real-world challenges across the entire eDiscovery lifecycle from legal hold and collections through analysis, review, and production. Ranked as a leader in the 2011 Gartner Magic Quadrant for E-Discovery Software, Clearwell can be rapidly deployed in-house or hosted by a Clearwell-certified service provider.

### Legal Hold

**Hold notices**—Enables hold notices to be quickly created and sent to custodians and system administrators via email. Templates are included and can be customized and saved for reuse, or users can import their own.

**Reminders and escalations**—Provides the ability to create and schedule reminders to non-responsive custodians and escalations for delivery to a custodian's manager if necessary for compliance.

**Custodian survey**—Provides the ability to create and issue survey questions to key custodians to easily capture information critical to a case.

**Survey response report**—Automatically compiles survey responses and presents them for analysis both in a summarized format, and by individual custodian.

**Custodian portal**—Provides custodians with access to summaries that detail their active, pending, and released holds in a single view.

**Automated tracking and reporting**—Automatically tracks and presents administrators with the status of all legal hold notices for one case or across all cases in a single view.

Case Name	Type	Hold Notices	Confirmed	Sent	Pending	Last Sent	Next Sched...	Actions
Union negotiation	Contract	3	51	20	06/09/2010	none		
Vortex Acquisition	HR	4	38	10	05/19/2009	none		
Krieger Phase III Study	FDA	1	34	1	09/07/2010	10/07/2010		
Genetech discussions_Rd 2	Antitrust	5	33	3	02/27/2009	none		
Breathright IP development	IP/Patent	2	27	0	01/11/2010			
Noncestral Phase III Trial	FDA	2	23	20	03/06/2009	none		
SEC v. Tamas	SEC	2	19	0	09/13/2010			
2010Q3 Earnings Docs	SEC	1	14	5	01/17/2010	11/17/2010		
Construction dispute	Contract	2	14	5	02/06/2009	none		
2010Q2 Earnings Docs	SEC	1	14	0	04/01/2010			
Genetech discussions	Antitrust	2	13	0	09/10/2009			
Adenocarc Phase II Trial	FDA	2	13	12	01/08/2009	none		
Krieger Phase II Study	FDA	2	13	0	11/26/2008			

**Automatic tracking and reporting:** View the status of all legal hold notices across all cases in a single view.



**Clearwell eDiscovery Platform:** Clearwell provides a single application for the entire eDiscovery lifecycle that is available as a physical or virtual appliance.

### Key Benefits

- Streamline the entire eDiscovery life cycle by using a single application that spans legal hold and collections through analysis, review, and production
- Execute complex, iterative eDiscovery processes that reflect real world scenarios with the highest level of defensibility
- Empower users to be productive immediately through an intuitive, web-based platform that is easy to use and administer

## Identification and Collection

**Interactive data map**—Maintains an interactive catalog of data sources and custodians that can be easily searched and browsed.

**Network collector**—Enables remote collection from 50+ critical data source types over the network.

**On-site collector**—Facilitates secure on-site collection from laptops, PCs, and files shares onto any standard USB drive or file share.

**Metadata filters**—Enables targeted collections by filtering via metadata fields such as owner/author, date range, and file type. Users can specify criteria via a point-and-click interface, eliminating the need for any scripting or programming.

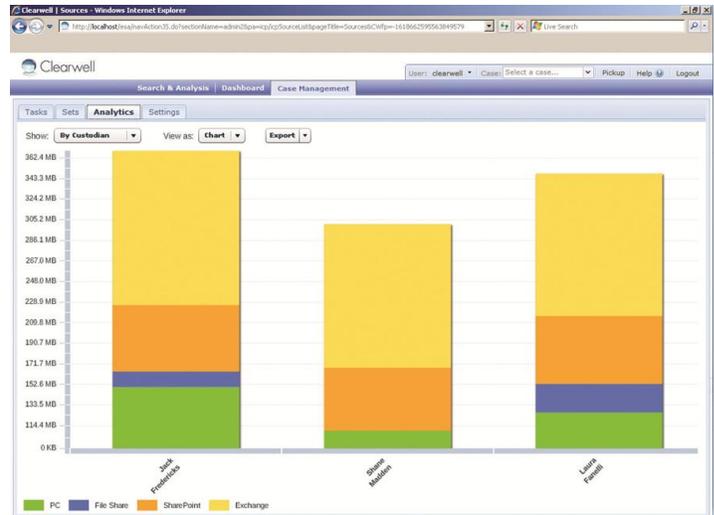
**Keyword filters**—Provides the ability to filter collections by keywords. Administrators have the option to leverage existing source indices to utilize federated search-enabled keyword collections from data sources behind the firewall or in the cloud.

**Symantec Enterprise Vault™ direct collector\***—Enables collection from Enterprise Vault at scale using the only direct collector certified by Symantec and the collection management console.

**Enterprise Vault collection filters\***—Enables targeted collections from Enterprise Vault by providing metadata and keyword filters that use the archive's existing index and Data Classification Services tags.

**Preserve in Enterprise Vault\***—Enables information in Enterprise Vault to be preserved in the controlled environment of the archive.

**Extended Microsoft SharePoint® Collections**—Allows users to collect the full range of SharePoint document types including blogs, wikis, calendar items, announcements, discussions, and surveys and render them in context.



**Collection analytics:** Provide a complete portfolio of analytical charts and tables that offer real-time visibility into the status of the collection.

**Collection scheduler**—Schedules network collections to run once or on a recurring basis to collect new or modified data.

**Data verification**—Automatically verifies the integrity of collected data before and after collection, ensuring each collection is forensically sound.

**Collection management console**—Centralizes all collection information into a single view, including file volumes, custodians, and detailed data sources.

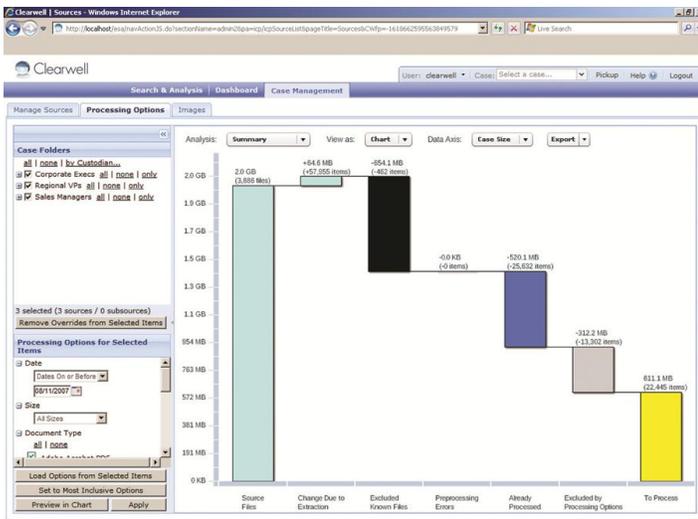
**Collection analytics**—Provides a complete portfolio of analytical charts and tables that offer real-time visibility into the status of the collection.

## Processing

**Advanced pre-processing filters**—Enables users to interactively filter data by custodian, date, strong file type, and file size prior to processing.

**Pre-processing analytics**—Visually summarizes overall document set characteristics and presents detailed analysis by custodian, timeline, and file type.

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**Pre-processing analytics:** Graphically depict data volume, file types, and time frames of collected data prior to processing.

**Rapid processing**—High-performance architecture processes and analyzes documents at rates of up to 1 TB per day.

**Robust file support**—Processes and analyzes over 400 different file types, including support for Optical Character Recognition (OCR) of images containing text.

**Intelligent deduplication**—Automatically deduplicates data across multiple data stores and across the entire data set.

**Multi-language support**—Provides full Unicode compliance and enables automatic language identification of documents.

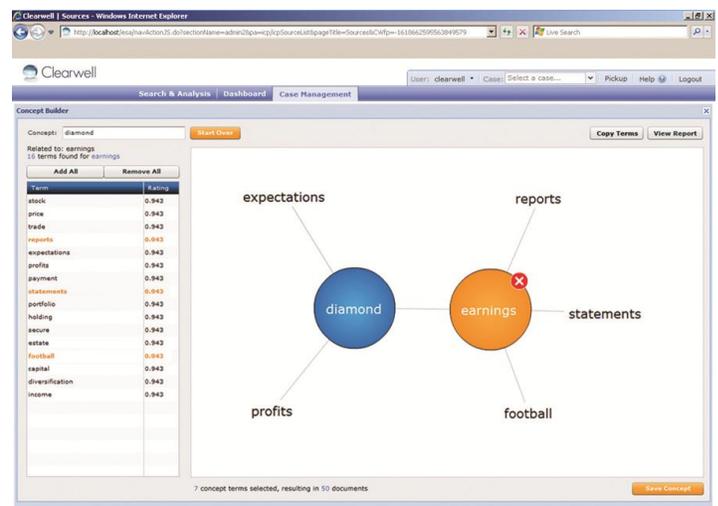
## Search and Analysis

**Transparent keyword search**—Enables a more defensible and collaborative eDiscovery search process and enhances the ability to cull irrelevant information.

- **Keyword search preview**—Provides matching keyword variations prior to running a search. Users can selectively include relevant variations or exclude false positive variations.
- **Keyword search filters**—Enables real-time search result filtering for individual queries or variations and allows users to sample the filtered documents.
- **Keyword search report**—Provides comprehensive reporting that documents all search criteria and provides detailed analytics of the results.

**Transparent concept search**—Delivers a unique set of features that enable an interactive, relevant, and defensible search process.

- **Concept search preview**—Allows users to contextually refine searches by previewing related terms, and selecting only those that are relevant before actually running a search.
- **Concept search explorer**—Provides a visual interface to dynamically explore and discover new relevant concepts.
- **Concept search report**—Automatically documents the related terms included in each concept search and provides detailed analytics of search results.



**Concept search explorer:** Provides a visual interface to dynamically explore and discover new relevant concepts.

**Multi-keyword search**—Runs up to 100 searches simultaneously and provides reporting to test effectiveness of searches.

**Advanced search**—Construct advanced searches for multiple fields using Boolean, stemming, wildcard, fuzzy, and proximity searches.

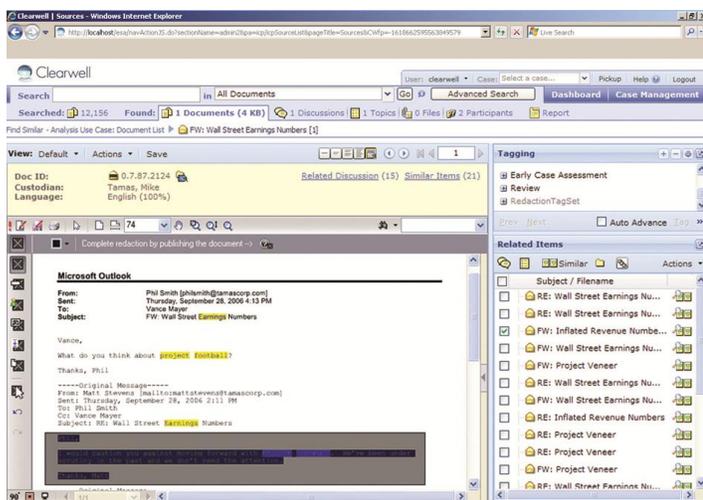
**Auto-filters**—Narrow search results using automatically-generated clickable filters that provide exact document counts.

**Discussion threads**—Links together all related messages into chronological threads that capture entire discussions, including all replies, forwards, and carbon copies.

**Topic classification**—Automatically organizes documents into specific topics, enabling users to quickly analyze all documents related to a particular subject.

**People analytics**—Monitors and lists the frequency of communications between key custodians.

**Term analytics**—Leverages natural language algorithms to uncover secret project names and code words that may be relevant to a case.



**Near-native viewer:** Provides immediate access to documents in near-native formats, enabling rapid review, tagging, and redaction.

## Review

**Near-native viewer**—Displays documents in a near-native format without requiring each application to be loaded on a reviewer's workstation.

**Persistent hit highlighting**—Highlights search terms in messages, attachments, and files within the Near-Native Viewer.

**Redaction**—Protects privileged, work product, and privacy information with reason codes and redaction verification

**Auto-redaction**—Automatically finds and redacts keywords, phrases, and personal information, such as Social Security numbers.

**Transparent predictive coding\***—Delivers a flexible and intuitive workflow that leverages the intelligence of expert reviewers to train the software on tagging criteria, automatically generate predictions, and analyze accuracy for rapid review.

- **Smart sampling**—Offers sophisticated analytics by criteria such as custodian, discussion, concept, and participant to ensure the selection of highly relevant training samples.
- **Smart tagging**—Allows reviewers to highlight the metadata and content relevant to a tagging decision.
- **Prediction insight**—Automatically provides a prediction probability score for the document under review and highlights content and metadata relevant to the prediction.
- **Prediction workflow management**—Provides a review management console with step-by-step guidance that automates the predictive coding workflow.
- **Prediction templates**—Enables users to import and export prediction models to leverage predictive intelligence across cases.
- **Prediction analytics**—Delivers a set of interactive charts and reports that enables reviewers to measure prediction accuracy and analyze documents by probability score.
- **Review quality control**—Provides a comprehensive quality assurance workflow for linear and non-linear review.

**Near-duplicate identification**—Identifies and displays near-duplicates, and automatically compares documents.

**Find similar**—Groups emails, attachments, and loose files with similar content to the document under review.

**Related documents**—Identifies and displays related documents, such as near-duplicates, similar documents, and those contained in discussion threads and attachments.

**Decision-tree tagging**—Tags individual or sets of documents using a customizable multi-layer tree structure.

**Auto-batching**—Automatically allocates documents into review folders based on either a set number of folders or a set number of documents per folder.

**Review folder management**—Monitors the completion of review sets and provides the status of review folders that are currently checked in or out by any reviewer.

**Review workflow template**—Provides customizable tag and folder templates that encapsulate best practices from enterprises, governments, and law firms.

**Auto-resume**—Enables users to resume review or analysis with the exact document and screen settings set prior to logging off.

**Load file import**—Provides the flexibility to import external load files from other review platforms into Clearwell.

**Review progress report**—Shows document review progress for a case in an automatically generated graphical report.

**Reviewer productivity report**—Shows the number of documents individual or groups of reviewers have tagged over a time period.

**Review scalability**—Enables case administrators to dynamically increase the number of concurrent reviewers by adding capacity on-demand.

### Production

**Native and image-based production**—Allows users to produce documents in native, TIFF, PDF, and mixed mode formats.

**Export and production management**—Streamlines the export and production process by providing sharable export templates and pre-mediation of issues.

**Bates stamping**—Applies sequential numbering of documents with Bates Stamps as well as custom headers and footers.

**Document export**—Delivers capability to export data in EDRM XML, DAT, and CSV formats, improving interoperability and seamless transfer of electronic data to outside parties.

**Rolling production**—Enables batch productions at any point in the eDiscovery process.

**Load file configurator**—Provides customizable load file creation during export, eliminating the need for custom

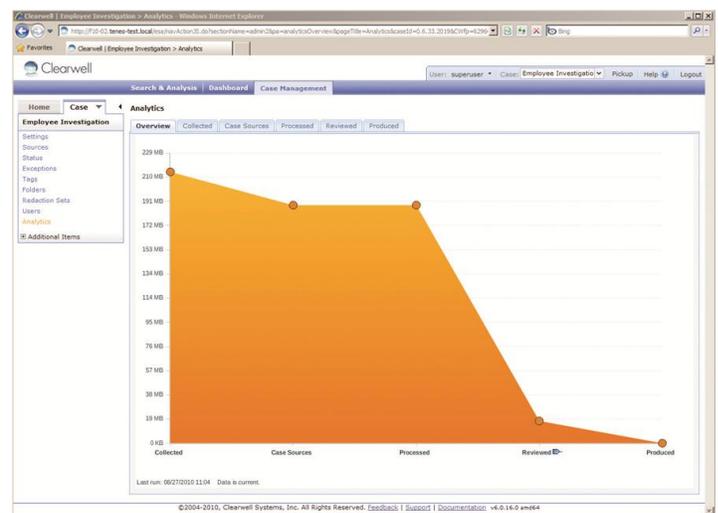
transforms prior to ingestion into third-party review applications.

**Export and production scalability**—Enables case administrators to dynamically increase export and production performance by adding capacity on-demand.

### Case Management and Reporting

**Case analytics**—Delivers summary reports to monitor case progress, ensuring that resources are properly allocated and deadlines are met.

**Lifecycle reporting**—Provides integrated dashboards and reporting for each stage in the eDiscovery process from legal hold through production.



**Lifecycle reporting: Summarizes case status from collection through production in a single dashboard, enabling unparalleled visibility into every stage of eDiscovery.**

**Multi-case architecture**—Provides 64-bit, distributed, case-based architecture, enabling the management of 100s of cases and 1,000s of users.

**Case configuration**—Allows administrators to easily create cases, manage groups, topics, review sets, and decision tree tag structures.

**eDiscovery dashboard**—Provides detailed analytics of all eDiscovery cases across an organization in an automatically generated graphical report.

**Audit trail and activity reporting**—Tracks user actions such as login, logout, search, tag, print, and export, providing a full, reproducible audit trail.

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### ***Enterprise Vault and the Clearwell eDiscovery Platform***

Together, Enterprise Vault and the Clearwell eDiscovery Platform bring a new level of information governance and end-to-end eDiscovery. Enterprise Vault is an archiving platform that helps bridge the gap between business, legal, and IT requirements by enabling an eDiscovery-optimized infrastructure based on intelligent information management. Enterprise Vault helps organizations reduce search and review time from weeks and months to just days or hours, enabling legal counsel and compliance teams to make faster, more insightful legal strategy decisions.

\*We plan to make the Enterprise Vault direct collector, Enterprise Vault collection filters and Preserve in Enterprise Vault feature set for the Identification & Collection Module, and the Clearwell Transparent Predictive Coding feature set for the Review & Production Module, available in a future release on a when and if available basis in a general release to all customers.

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### **More Information**

#### ***Visit our website***

<http://www.symantec.com/clearwell>

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