

# Clearwell Review & Production Module

## Data Sheet: Archiving and eDiscovery

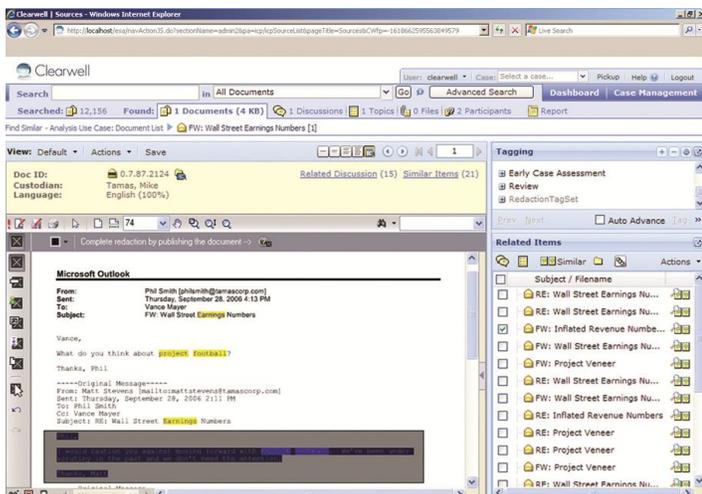
### Overview

The Clearwell Review and Production Module provides legal professionals in corporations, government agencies, and law firms with a wide range of features needed to rapidly conduct privilege and responsive review. The module supports over 100 concurrent reviewers and scales to support even the largest cases. Since the Review and Production Module is part of the Clearwell eDiscovery Platform™, users benefit from one seamless application that supports the entire eDiscovery lifecycle, eliminates the need to create load files, and enables a truly iterative eDiscovery workflow. Key features of the Review and Production Module are below.

### Review

**Near-native viewer**—Provides the ability to view documents in a near-native format without requiring each application to be loaded on a reviewer's workstation. Both text search and hit highlighting within documents are available, increasing reviewer productivity.

**Redaction**—Enables reviewers to quickly and easily redact documents in multiple colors, apply reason codes, and verify redactions prior to production. Reviewers can redact specific text, pages, or areas within a document. Redaction Verification allows reviewers to rapidly navigate through each redaction within a document and quickly perform quality control checks to verify accuracy.



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

**Auto-redaction**—Accelerates redaction by automatically finding and redacting keywords, phrases, and personal information, such as names, Social Security numbers, credit card numbers, and email addresses.

**Optimized review interface**—Delivers a redesigned user interface that maximizes screen real estate and minimizes mouse clicks to increase review throughput. Dual monitor support, breadcrumb navigation, and thumbnail view allow reviewers to quickly navigate through document sets.

**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. The net result is a more defensible review process at significantly reduced cost.

- **Smart sampling**—Offers sophisticated analytics by criteria such as custodian, discussion, concept, and participant to ensure the selection of highly relevant training samples. Intelligent training samples result in greater prediction accuracy.
- **Smart tagging**—Allows reviewers to highlight the metadata and content relevant to a tagging decision for more granular training, improving the accuracy of predictions and reducing the number of training cycles.
- **Prediction insight**—Automatically provides a prediction probability score for the document under review and highlights content and metadata relevant to the prediction. Users can quickly assess how the prediction was generated

to improve prediction accuracy and make consistent review decisions, bolstering defensibility.

- **Prediction workflow management**—Provides a review management console with step-by-step guidance that automates the predictive coding workflow, allowing users to begin utilizing predictive coding immediately while achieving optimal and defensible results.
- **Prediction templates**—Enables users to import and export prediction models to leverage predictive intelligence across cases. The use of templates streamlines the review of cross-matter issues resulting in reduced cost and risk.
- **Prediction analytics**—Delivers a set of interactive charts and reports that enables reviewers to measure prediction accuracy and analyze documents by probability score, resulting in more informed review decisions.
- **Review quality control**—Provides a comprehensive quality assurance workflow for linear and non-linear review, enabling users to perform statistically valid sampling, identify inconsistent tagging, view disagreements between reviewers, and automatically compare predictions and human decisions to assess and improve review accuracy.

**Find similar**—Allows reviewers to easily identify and view emails, attachments, and loose files with similar content to the document under review using a dynamically configurable similarity threshold. Reviewing similar documents together accelerates the review process, provides full context for the document under review, and ensures greater tag consistency.

**Decision-tree tagging**—Creates the ability to tag individual or sets of documents using a multi-layer tree structure. This directs reviewers into key decision points, preventing errors and minimizing the number of clicks needed to accurately tag a document. Customization capabilities allow administrators to create different tag sets and control tag access.

**Auto-batching**—Allows administrators to automatically allocate documents into review folders using flexible allocation rules. Auto-batching streamlines the process of creating review sets and facilitates easier case management.

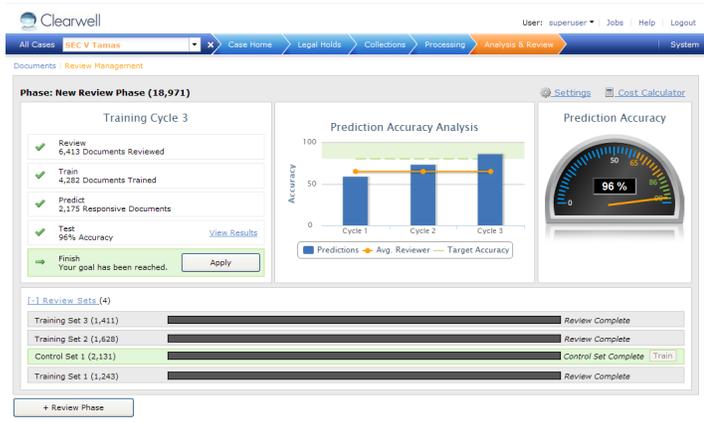
**Concept review**—Enables users to run a Transparent Concept Search on a review set in order to prioritize documents by concept for efficient review.

**Review folder management**—Allows users to monitor the completion of review sets and see which review folders are currently checked in or out by any reviewer. Case administrators can control access to the review folders and stop or complete a review that is in progress.

**Review workflow template**—Provides a customizable tag and folder template that encapsulates best practices from enterprises and law firms.

**Related documents**—Automatically identifies and displays related documents, such as near-duplicates, documents with similar content, documents contained in the same discussion threads, and attachments to the document under review.

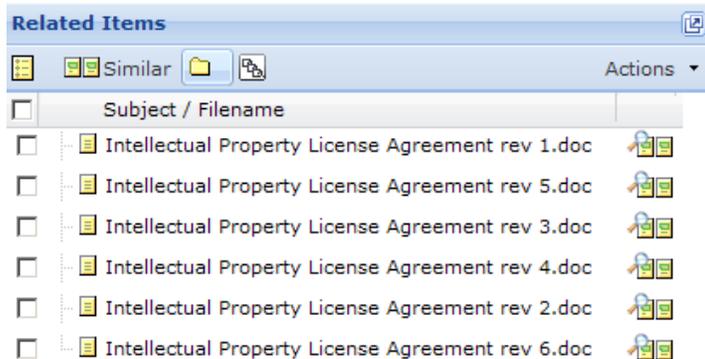
**Persistent hit highlighting**—Highlights search terms in emails, attachments, and files within the near-native viewer, allowing reviewers to quickly navigate to keywords across one or more searches (e.g., terms from previously executed privilege and responsive searches).



**Prediction workflow management: Provides a review management console with step-by-step guidance that automates the predictive coding workflow.**

**Near-duplicate identification**—Allows reviewers to easily identify, view, and tag near-duplicate emails, attachments, and loose files. Near-duplicate documents can be compared with differences automatically highlighted.

**Auto-resume**—Enables users to log off then later resume their work with the exact document and screen settings displayed prior to logging off, eliminating delays associated with resetting screen settings.



**Related documents:** Displays attachments, discussion threads, and similar documents related to the document under review, accelerating the review process and improving tagging consistency.

**Load file import**—Provides the flexibility to import external load files from other review platforms into Clearwell, enabling a consolidated view of all case documents and their classification.

**Review progress report**—Shows document review progress for a case in an automatically generated graphical report. The report can be customized to report on folders, tags, dates, and users and allows administrators to easily monitor the real-time status of cases using a variety of parameters.

**Reviewer productivity report**—Shows the number of documents tagged by a reviewer or group of reviewers over a chosen time period. The report can be customized to report on folders, tags, dates, and users and allows administrators to compare reviewer productivity based on the number of documents reviewed per time segment or over a date range, making reviewer management simple and effective.

**Reviewer management**—Enables case administrators to easily manage reviewer accounts, including user name, password, role, and access to tag and production privileges. All reviewer actions, such as login, logout, search, tag, print, and export, are tracked, providing a full, reproducible audit trail.

**Review scalability**—Enables case administrators to dynamically increase the number of concurrent reviewers by adding capacity on-demand in order to meet tight deadlines and handle the largest cases.

### **Production**

**Native and image-based production**—Allows users to produce documents in native, image (TIFF or PDF), and mixed mode formats (e.g. Excel spreadsheets in native, but all others as images). Flexible export options allow for multiple metadata formats (EDRM XML, DAT, CSV, etc.), "reduping" of data by custodian, and preservation of original folder hierarchies.

**Bates Stamping**—Automates the sequential numbering of documents with Bates Stamps and supports custom labeling of produced documents using headers and footers.

**Integrated production folders**—Allow review teams to create production sets using the same folder features utilized during review, enabling a collaborative approach to building accurate production document sets.

**Export and production management**—Provides sharable export templates and pre-mediation of issues which eliminate manual steps, reduce errors, and enable case administrators to preemptively address issues resulting in faster export and production.

**Rolling production**—Enables batch productions at any point in the eDiscovery process. Users can track the progress of each production in real-time and view produced document sets within Clearwell in the exact format provided to outside parties.

**Load file configurator**—Provides customizable load file creation during export. Expanded export options allow for multiple metadata formats including CSV, DAT, EDRM XML, as well as Concordance®, Relativity®, and Summation® load files.

**Export and production scalability**—Enables case administrators to dynamically increase export and production performance by adding capacity on-demand in order to meet tight deadlines and handle the largest cases.

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

Together, Symantec 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 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***

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