Veritas™ Early Case Assessment Solution

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The Challenge: Weeks Delay Ascertaining Case Facts and Determining Case Strategy at the Onset of a Legal Matter

To evaluate risk and settlement value, legal practitioners need to quickly and accurately estimate the scope of electronic discovery, prepare for Meet & Confer conferences, and assess case facts, demonstrating that early case assessment (ECA) is a requirement. In addition to informing better case decisions, early case assessments also provide the foundation for substantial legal cost reductions. According to industry studies, 90.5 percent of legal professionals believe that early case assessment is critical to reducing electronic discovery cost in their organizations.[1] In contrast, most organizations do not have solid electronic discovery procedures or technologies in place to reduce risks and costs.

Accessing the relevant case information at the onset of a legal matter is paramount. With the traditional approach to electronic discovery there is very little visibility into the volume and makeup of case data bound for processing and review. Organizations have come to rely on multiple standalone tools for collection, processing and review, creating delays before legal teams can access the case data. This fragmented process makes it almost impossible to evaluate the case facts at the beginning of a case and accurately scope the time and cost of electronic discovery. Without this knowledge legal professionals are forced to make "fight or settle" decisions with incomplete information, which often results in suboptimal case decisions and significantly higher legal risk and costs throughout the case.

The Veritas™ Early Case Assessment Solution

By providing immediate access to case facts and industry-leading search and analysis capabilities in a single application, the Veritas™ eDiscovery Platform accelerates early case assessments from weeks to hours.

Veritas is the market leader for automated Archiving and eDiscovery. Our solutions have been consistently recognized as industry leaders in independent surveys and reports. Gartner named Veritas Enterprise Vault™ and the eDiscovery Platform a "Leader" in its Magic Quadrants for Enterprise Information Archiving and eDiscovery Software.[2]

Leading analysts also report that our solutions have an unmatched reputation for customer satisfaction. Many organizations depend on Veritas for archiving and electronic discovery. Indeed, Veritas™ Archiving and eDiscovery solutions are used by over half the Fortune 100 and more than 16,000 organizations (with over 31 million users) around the world.

The Benefits:

General Counsels, attorneys, and litigation support professionals within enterprises and law firms realize significant benefits by using the Veritas™ eDiscovery Platform, powered by Clearwell during early case assessments to:

- Rapidly identify relevant evidence and collect from key custodians.
- Accurately estimate eDiscovery time and cost at the onset of the case.
- Quickly asses case facts to determine best case strategy.
- Better prepare for the keyword negotiation during the Meet & Confer.
- Meet court appointed and FRCP deadlines.

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1. Cowen Group Survey, 2009
2. Gartner, Inc., Magic Quadrant for Enterprise Information Archiving, Sheila Child, Kenneth Chin, Oct 29, 2010. Gartner, Inc., Magic Quadrant for eDiscovery Software, Debra Logan, John Bace, May 13, 2011

Key capabilities of the eDiscovery Platform include:

Analyze emails, attachments, and documents in minutes: The eDiscovery Platform is quickly and easily installed, allowing legal teams to begin their electronic discovery process sooner and understand the context of the case across the collected data set. As a single application for the entire electronic discovery lifecycle, the eDiscovery Platform is capable of collecting from all critical enterprise data sources, processing data immediately and beginning analysis without moving data between multiple standalone tools. Consequently, legal teams gain earlier access to the case, allowing them to make informed decisions from the onset of a legal matter.

Rapidly collect data in a defensible manner: During the collection process, the eDiscovery Platform verifies the integrity of the data before and after collection, ensuring data is forensically sound and providing a defensible audit trail that can be used to document chain of custody. The collection capability also allows either IT or legal teams to easily collect custodial data from multiple critical data sources including email servers, employee computers, file servers, Microsoft SharePoint®, and applications in the cloud.

Accurately scope eDiscovery budget and timeline: The eDiscovery Platform Pre-Processing Analytics visually summarize overall document set characteristics and present detailed analysis by custodian, timeline, volume, and file type. This rapidly confirms that all case data has been collected and provides detailed statistics used to accurately estimate an electronic discovery budget and timeline.

Discover exactly who knew what, and when: The Discussion Thread feature links all related messages including all replies, forwards, CC's and BCC's, and provides a chronological thread of an entire discussion. By tracing the thread, legal professionals can identify all participants involved and determine who knew what and when.

Conceptually understand the data: Uses can quickly analyze all documents related to a single subject. Topic clustering utilizes patent pending linguistic algorithms to automatically organize documents into specific topics.

Quickly discover the most relevant evidence to your case: Transparent Search delivers a new set of search features that enable a more defensible and collaborative electronic discovery search process. Users are able to avoid excessive false positives and quickly identify relevant data. The identification of pertinent information is further accelerated with the Find Similar feature which allows reviewers to easily identify and view items with similar content to the document under review, exposing the scope of an idea across the entire case.

> "With the eDiscovery Platform, we have instituted electronic discovery best practices including a streamlined electronic discovery workflow and strategic early case assessments, leading to significant cost savings."
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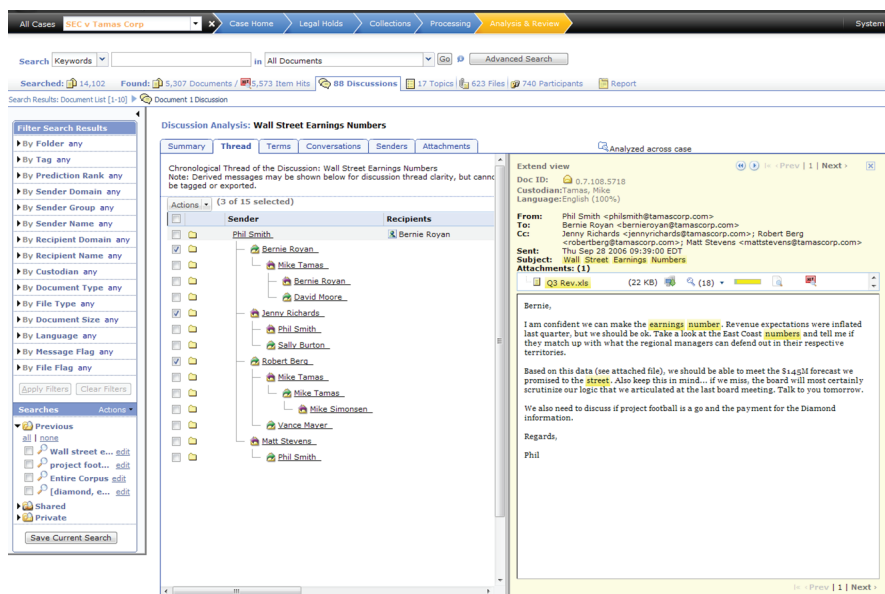> Jeff Neumeyer, VP And Litigation Team Leader, OfficeMax

Figure 1. Discussion Threads Automatically links emails into threads enabling rapid analysis and identification of case facts.

Rapidly complete first-pass review: Decision-Tree Tagging allows individual items (for example, emails, loose files, attachments, or embeddings) or sets of documents to be tagged using a multi-layer tree structure. This directs reviewers to key decision points, preventing errors and minimizing the number of clicks needed to accurately tag a document. Attorneys can review documents online in native format without requiring each application to be loaded on a workstation thereby streamlining the early case assessment process.

Quickly identify all custodians: With the People Analytics feature, analysis of individual and group-to-group communications within a company, to customers, suppliers, and partners allow users to easily establish a list of top custodians for a specific search. In addition, the eDiscovery Platform Term Analytics leverages natural language algorithms to analyze noun phrases, which help users uncover secret project names and code words that may be relevant to a case or investigation.

Effectively prepare for the Meet & Confer: Having the ability to easily sample and test keyword searches in preparation for the Meet & Confer. is critical. The eDiscovery Platform automatically generates search reports that document all search criteria and provides detailed analytics of the results. The report tracks search terms and variations that were included and excluded, providing a defensible audit trail of conducted searches.
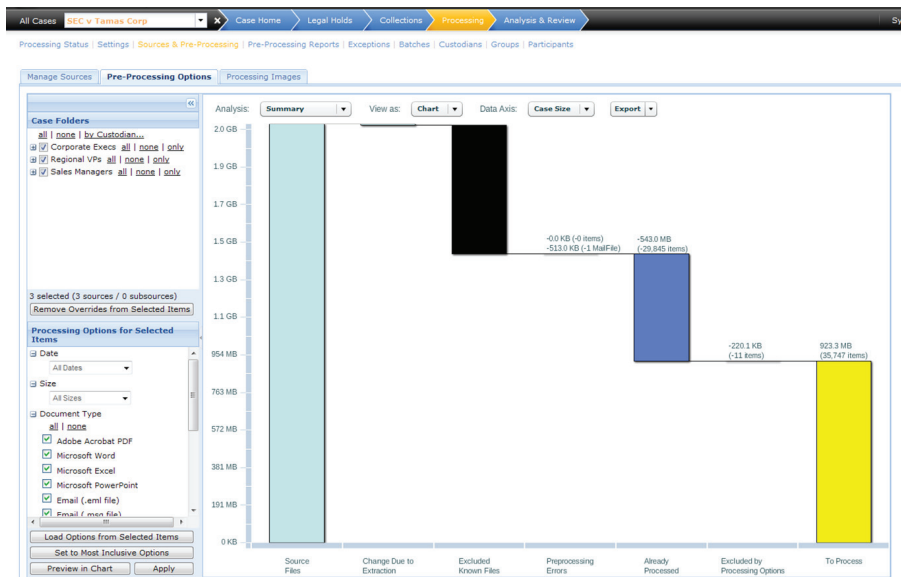
Figure 2: Pre-Processing Analytics: Provides data statistics prior to processing enabling accurate case budget and timeline estimates.

More Information

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About Veritas Technologies Corporation

Veritas Technologies Corporation enables organizations to harness the power of their information, with solutions designed to serve the world's largest and most complex heterogeneous environments. Veritas works with 86 percent of Fortune 500 companies today, improving data availability and revealing insights to drive competitive advantage.

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