

The Ultimate Guide to eDiscovery Platforms

```
elif _operation == "MIRROR_Y":  
    mirror_mod.use_x = False  
    mirror_mod.use_y = True  
    mirror_mod.use_z = False  
elif _operation == "MIRROR_Z":  
    mirror_mod.use_x = False  
    mirror_mod.use_y = False  
    mirror_mod.use_z = True
```

```
#selection at the end -add back the deselected mirror modifier object  
mirror_ob.select= 1  
modifier_ob.select=1  
bpy.context.scene.objects.active = modifier_ob  
print("Selected" + str(modifier_ob)) # modifier ob is the active ob  
#mirror_ob.select = 0
```

Introduction

The digitization of communication and documentation changed how the legal field handles discovery, ushering in the age of eDiscovery. Because the amount of data often involved in the discovery process is so vast, eDiscovery can be a challenge regarding costs, time, and security.

Many companies completely outsource eDiscovery, but it's actually a great application for insourcing. Managing such an endeavor requires robust, intuitive, and efficient software. Determining which platform is right for you and how to deploy it can be difficult to navigate.

IN THIS GUIDE, WE'LL SHARE WITH YOU:

- The basics of eDiscovery
- The benefits of eDiscovery
- The stages of eDiscovery from outsourcing to end-to-end in-house management
- Expectations for eDiscovery platforms, evaluation criteria, and more
- Questions to ask when comparing software solutions

What Is eDiscovery?

eDiscovery refers to the electronic aspect of identifying, collecting, and producing electronically stored information (ESI) in response to a request within a lawsuit or investigation. ESI includes emails, documents, presentations, databases, collaboration tools, voicemails, audio and video files, social media, websites, and other electronic communication.

eDiscovery Is Different From Hard Copy Evidence.

The processes and technology associated with eDiscovery can often be complex simply because of the vast volume of data. It's also much different than hard copy evidence because ESI is more dynamic and typically includes metadata, such as time/date stamps, author and recipient information, and file properties. That metadata is just as crucial as the ESI itself.

Preserving the content and metadata for ESI is necessary as well to eliminate any claims of spoilage or tampering with evidence later in the case.

For some time, many organizations outsourced all the eDiscovery functions for cases. That trend is now waning, with more companies desiring to bring the work in-house. So why the change?



The Shift to In-House eDiscovery

Every company involved in legal cases uses eDiscovery to some extent. The previous standard was to outsource all of it. Companies gather up all the ESI and submit it to third parties. That may seem simple and easy. However, it doesn't alleviate the concerns of legal stakeholders because the process is prohibitively expensive, risky, and time-consuming.

As a result, the shift to in-house eDiscovery makes sense to many. Gartner backs this up with the prediction that by 2023, more than [70% of enterprise IT leaders](#) will upgrade to end-to-end eDiscovery software, up from 10% in 2019.

So what are those factors that are influencing businesses to bring the work internally?





Cost Of In-House eDiscovery Is Lower.

Outsourcing all eDiscovery is expensive. You're paying a law firm to use the same type of tools you can adopt. According to a study by RAND Corporation, the legal partner accounts for [70% of eDiscovery costs](#).

Legal budgets, like those of any other area of business, aren't growing. The [2021 EY Law Survey](#) found that 88% of corporate legal heads plan to cut budgets over the next three years but expect 25% greater workloads during that period. As a result, outsourcing may no longer be the best path to meet these new financial demands.

If outsourcing isn't helping you operate leaner, the likely response is to bring things back in-house. The technology outsourced partners use isn't the bulk of the spend here — it's their human resources. Thus, if you have internal resources and a cost-effective technology stack, you can shrink the costs of eDiscovery.

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Data Is More Secure And Risk Is Lower.

Data security is a priority for any organization in eDiscovery. With outsourcing, you have to share the data with your legal vendor. That requires encryption while in transit and at rest.

With cybersecurity threats growing every day, the risk of a breach or ransomware is ripe. Not only do you have to ensure you have a proactive approach to data security, but you must also be confident in your partner's infrastructure. This can be difficult because most organizations aren't going to provide you granular specifics on this.

There's no way to eliminate data security and risk in this paradigm. You can, however, be proactive about cybersecurity within your network, fortifying it with all the best practices. How vendors operate and set up their network will never be as transparent as you would hope.



You Can Control The Timeline.

In the legal field, everything has a deadline. These are not optional, so the eDiscovery process must be fast and streamlined. Unfortunately, those expectations often fall short for several reasons, such as inept vendor procedures and the volume of ESI. When you outsource, timing can often be out of your control, thus requiring a request for a continuance.

You have no guarantee that the other side will agree to this, which could cause significant consequences that aren't good for your case. If you want to control the timeline, you have to control the process.

These concerns, coupled with an increasing workload, create the need to seek out the right eDiscovery solution that reduces cost, limits risk, accelerates analysis, and enables your team to be more productive.

Transitioning to In-House eDiscovery

The advantages to bringing eDiscovery in-house deliver more control, but there are several things you'll need to put in place to build the foundation.

Bridge The Knowledge Gap.

The knowledge gap is the first hurdle to overcome when bringing eDiscovery in-house. It's time to ask questions that help you bridge the knowledge gap so you are fully prepared.

Those questions include:

- Do your people have the right experience? If not, what will you need to bring them up to speed?
- What are the unique requirements you may have when adopting eDiscovery software?
- How will you deploy this new process in a way that reduces costs?





Consider Resource Concerns.

Next, you need to consider what type of resources are necessary to run such an operation. The most valuable resource is your people. But do you have enough employees? And are they the right ones?

Additionally, you should consider other resources, such as server requirements and security infrastructure, to support this technology transition. It is never too early to evaluate and compare cloud-based solutions with an on-premise technology stack.

Think about all the “what-ifs” of putting this process into place and what effect it will have on all your company’s resources.

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Develop Processes And Workflows.

Another challenge is defining the processes and workflows of eDiscovery. While every case will be unique, you should document the basic steps. For anything outside of the standard, you should outline that as well. The goal is to define the complete process from start to finish so that it's consistent and repeatable.

If you can do this, you can drive efficiency in the process and be confident in it working regardless of the volume of data.



Simplify Data Collection.

Data and documents that could be relevant for a case can be in so many places, including email, Microsoft Teams, Slack messages, Office 365, and PDFs. You'll find that data collection is complex and overwhelming.

Data also can be in many formats, making the collection of it more challenging. It's enough to make most companies believe in-house eDiscovery isn't feasible. The reality is that you can securely and easily aggregate case-relevant data from all possible sources into one with the right eDiscovery platform. You don't need to be data scientists to do this; you just need to have the right tools.



Evaluate Risk Management Processes.

The final challenge to meet is risk management. The data you're collecting, storing, and analyzing must be kept secure. Once that data is under legal hold, the stakes regarding risk are even higher.

You'll need to collaborate with third parties, external witnesses, legal partners, and infrastructure providers to mitigate risk and build the proper IT infrastructure to support security and protect intellectual property.

Your Transition Can Be a Slow Ramp Up

Your transition to in-house eDiscovery can be gradual. You don't have to go from zero to full adoption. Because you can slowly ramp up, you can keep addressing the challenges and concerns, refining processes and workflows until they are efficient and effective.

In your journey to in-house eDiscovery, begin with a few cases. In those first few trial runs, get the people, process, and technology in place to ensure a smooth transition.



How Does the Process Look From Outsourcing to End-to-End eDiscovery?

As you ease into eDiscovery, you will encounter many steps from outsourcing some or all of the work to commencing on an end-to-end eDiscovery solution. To understand what the process looks like, here's a breakdown of each phase.

01 Stage One: Start With ECA.

By starting with early case assessment (ECA), you are taking the time to plan and organize before diving in, and you'll realize an immediate return on investment for your efforts.

Getting ECA firmly in place enables you to use in-place indexing, artificial intelligence (AI) tools, and search fundamentals to reduce your data down to what needs to be processed.

In this step, you'll also become familiar with the user interface, train your staff, and begin to put in place the things you need to scale eDiscovery.

By beginning with ECA, you get a sense of what the entire eDiscovery process entails. You'll learn how ingestion of data works, including unstructured and structured data, and how the AI engine interprets, extrapolates, and infers results from it.

Maintaining your data behind your company firewall limits its exposure to risk. And by starting with the ECA process, only data that is pertinent to the case and ready for processing and review is passed to outsourcing.

The end result of the first step is optimized data before processing and reduced cost and data leakage risk.

Once you master ECA and feel comfortable with taking more of the work in-house, you can move to the next phase.

02

Stage Two: Grow From ECA To Processing In-House.

To get to the next stage in your journey to end-to-end eDiscovery, you'll need to expand your eDiscovery platform to processing. In the outsourcing model, your vendor managed the processing. But you can do the same with the tools they use.

The key here is to ensure you have a solution that quickly processes a high volume of data. It should also be able to process different media types, custodians, and job types. With this in place, you can focus on the essential information, only sending out a load-ready file for review.

03

Stage Three: Achieve End-to-End eDiscovery.

Building on the ECA and processing, you can achieve total self-sufficiency with eDiscovery. You'll have complete control over data, cost, and time. By leveraging a self-service interface, you can enable in-house attorneys to review and analyze the results.

With AI-powered, assisted review within your eDiscovery platform, you'll spend much less time on review, concentrating on only the most critical pieces for your case.

Building Your In-House eDiscovery Toolbox

eDiscovery software is the foundation for transitioning to an in-house process. There are lots of options on the market, but they aren't all the same. There are many differences, and you'll need to commence a comprehensive review based on your needs, budget, and adoption timeline.

Assess Overall Functionality.

First you'll want to assess big-picture aspects of the software.

SELF-SERVICE FUNCTIONALITY

A self-service eDiscovery portal is a web-based platform where a corporate legal department, law firm, or external partners can upload, manage, and process legal or investigative data with ease and security. With a reputable self-service eDiscovery platform, a lawyer or a paralegal in a law firm can perform eDiscovery tasks such as early case assessment, review of relevant data, data analytics, and production anytime at any place in the world with an internet connection. Built-in capabilities such as invite to upload, self-expiring links, and secure data sharing keep your information and platform safe, prevent data sprawl and reduce costs of having to manage multiple copies of the same data.

To review all the self-service use cases, please read this [short guide](#).

MIGRATION CAPABILITIES

Moving data when changing systems can be a significant pain point. You'll need to assess the ease of migration from legacy platforms to the new solution. Depending upon your existing solution, you may simply begin any new matters on the new in-house system and finish up existing cases using the legacy solution. It's prudent to ask prospective vendors to strategize and assist with this.

HOSTING

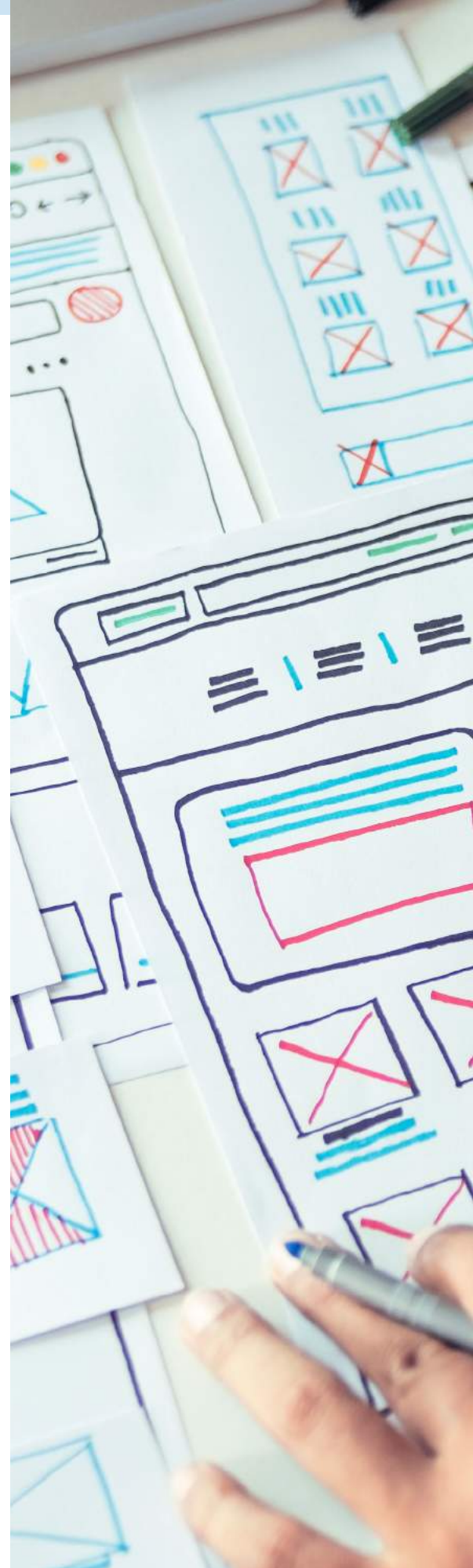
How you host your solution depends on your IT infrastructure and which people need access to the system. Not all solutions have flexibility here, so you'll need to determine if they offer hosting on-premises, in the cloud, or both.

USER EXPERIENCE

When considering the user experience, you need to ask if the software is a truly unified system or just a collection of widgets. This matters because if it's just modules that are loosely connected, this creates a poor user experience, which will impact implementation and adoption.

The user interface is critical for streamlining workflows and getting users comfortable. If it's disjointed or overly complex, that's a sign it won't meet your expectations.

You need to discern how easy it will be for your staff to learn and if certification is necessary to use the solution.



WORKFLOW AUTOMATION

A system with built-in templates ensures you can streamline workflows, easily duplicate processes, and reduce manual errors. Automated error-correcting workflows save high-value personnel time and do not interrupt the eDiscovery process. Very few systems include workflow automation, scheduled processes, and templates, so they're something to have on your radar.

REVIEWER VIEWS

Customizing views for individual reviewers makes the process more efficient. This is a must-have feature when you have a large quantity of data and documents.

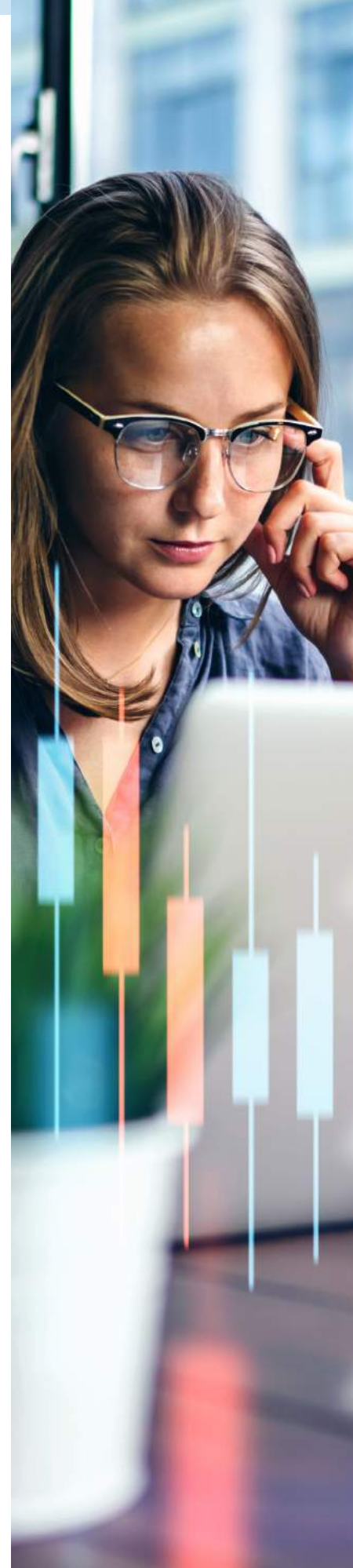
ADVANCED TOOLS

Another essential aspect of overall functionality is advanced tool availability. Multiple components could be of value to you, including:

- Social media viewing
- Social network diagrams
- Missing email generation
- Capabilities to read any type of media, not just text

REPORTING CAPABILITIES

If you want to determine how effective your process is, then your solution needs reporting features. You'll want to track processes and activities and monitor staff performance. From this data, you can then derive insights into effectiveness and make adjustments where you see gaps.



SECURITY

Security of your data and the system itself is critical. You'll want to inquire about things such as:

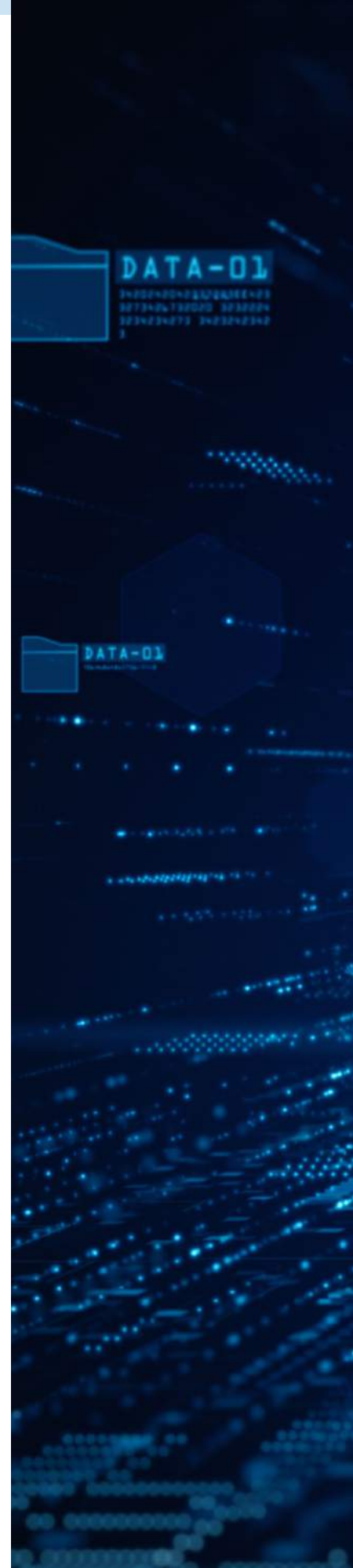
- Single sign-on
- Two-factor authentication
- Secure collaboration with outside partners

COSTS

Cost is always a consideration when choosing software. Systems can range widely on costs and how they charge. Look for flexible licensing instead of per-seat licensing to keep costs within budget. Most eDiscovery platforms today charge by the gigabyte (GB) of data, so it's important to not only understand the cost per GB but also how efficient the software is at culling data that isn't needed or is obsolete. Generally, SaaS pricing is more expensive than an on-premise eDiscovery solution due to the cost of maintaining an enterprise-level technology stack coupled with high availability, redundancy, and maintenance of world-class security. However, this may be more affordable and secure than purchasing and maintaining the servers yourself. Always discuss these options with your IT team so that timing, scalability, and maintenance are all considered. The best SaaS systems are multi-tenant cloud architecture so that software releases, patches, and backups are all handled by the eDiscovery vendor.

CUSTOMIZATION OPTIONS

You'll likely want to customize some parts of the software. The primary area for customization is around fields. If this is important to your workflows, find out if it's possible.



Evaluate Data Processing Features.

The next set of features to evaluate all revolve around processing. These are the areas to concentrate your questions for vendors:

- **Indexing:** All software will have indexing for documents and emails, but you'll want to know how quick, efficient, and reliable it is.
- **Supported file formats:** Can the system support any file format? If not, what are the limitations, and will those impact you?
- **Text/metadata extraction:** Test out a system's ability to extract text and metadata before you make a decision.
- **Throughput:** Processing large amounts of data will be a regular occurrence. If the system can't keep up, it creates a bottleneck.
- **Scalability:** Can the system scale to fit your needs as you add more cases? Ask about what it can process in a day.
- **Integrations:** Can you integrate the software with applications such as Office 365, Microsoft Teams, Slack, or Cellebrite? It will need to in order to provide an end-to-end solution.
- **Near-duplicate identification:** This is a standard part of the reviewing process, reducing the amount of data that needs expert review.
- **Job prioritization:** Every case has a timeline, and you often need to reprioritize these, so your system should be able to pause and shuffle jobs.



Evaluate Review And Production Features.

What are the review and production features that should be top of mind?

- **Interactive ECA dashboards:** Go beyond static dashboards to those that allow for interaction.
- **Batched review and review management:** Batching data for check-in/out is a must with large reviews. Also, review management tools enable project managers to monitor the performance of review teams.
- **Advanced search:** Not all search functions are the same. You want one that's robust enough to identify word forms and synonyms.
- **Tag management for multiple media transcript types:** Searching and tagging within transcriptions is an eDiscovery requirement. Without it, you'll be on the hook for manual transcription fees.
- **Native redaction:** Will you have tools to handle native redacting within the platform? Having it saves time and money.
- **Email threading:** This feature provides the natural flow of email communication. Without this, context can be lost and add time to email review.
- **Export capabilities and speed:** You want both speed and quality in your processing, and you shouldn't have to compromise on either.
- **CAL/TAR (predictive coding):** Human review of data isn't feasible in many situations. Technology-assisted review (TAR) and continuous active learning (CAL), which leverage machine learning to perform predictive data coding, are necessary.

Red Flags To Avoid When Evaluating Solutions

In addition to looking over the key criteria above when comparing solutions, there are some additional things to consider that could signal red flags.

IS THE SOLUTION LIGHT ON FEATURES?

If it's not capable of true end-to-end management, there will be too many gaps that could result in more costs and delays.

IS THE USER INTERFACE CONSISTENT?

If not, user adoption and productivity could be an issue.



IS THE DATA LAYER UNIFIED?

If not, you'll find yourself exporting data from one side of the tool and importing it into another. This will cause delays, errors, inconsistent behavior, and even lost data. This usually happens when vendors acquire disparate solutions and try to cobble them together in an attempt to call themselves an "end-to-end" platform.

DOES THE PROVIDER OFFER RESPONSIVE SUPPORT AND ACCESS?

You can gauge this by reading reviews and asking questions. If things don't add up to excellent service, this could be a reason to walk away.

ARE THERE ANY ETHICAL CONCERNS?

Any company you choose to do business with should be reputable and scandal-free. Always be sure you know with whom you're working.

TOP QUESTIONS TO ASK eDISCOVERY SOFTWARE COMPANIES

Beyond features and functionality, there are more questions to ask:

- ④ What's the total cost of ownership and return on investment?
- ④ What are the training options?
- ④ Does using the software require certification?
- ④ How fast can the solution be implemented?
- ④ Is the solution flexible enough to be deployed as a software-as-a-service solution, in a data center, and/or in a public cloud?
- ④ Does the system come with automated workflows to maximize productivity and minimize human errors and cost of operations?

Venio Systems Offers eDiscovery Software That's Simple, Fast, and Turnkey

[Our solutions](#) make it easy for legal and investigative teams to quickly uncover the most critical information in the most complex cases. With lightning-fast processing, AI-powered TAR, deep analytics, and cloud and hybrid delivery, our eDiscovery solution provides all you need to handle more cases with greater speed, accuracy, and predictability – everything you need in a single, cost-efficient eDiscovery platform.



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