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SF Legal Real-Time Solutions:



SF Legal uses Clearwell to reduce 1.2 Million documents to 200,000; Relativity to review 50,000 documents in five days

Situation: Our client had 1.2 million electronic documents, primarily email, and 50,000 documents scanned from paper. Production was due to begin in one week, with rolling productions over the subsequent week.

Process: The SFL team met with review leaders assigned to each collection. The electronic documents were loaded into Clearwell and images and OCR of the hardcopy documents were loaded into Relativity. Separate case teams attacked each collection.

The electronic data team used Clearwell to run approximately 500 search terms across the documents to determine which were responsive. From there, they used Clearwell's domain filtering, transparent term searching and tagging to eliminate privileged documents from the collection. Over the course of several days, they reduced the 1.2 million document collection to approximately 200,000 responsive documents. The responsive documents were processed to provide opposing counsel with the metadata, text and native files as specified in their 26(f) meeting.

The Relativity team used Relativity's Batching function to assign groups of 1,000 documents to reviewers. Reviewers checked batches out of a self-service queue. As they reviewed, they marked documents as Privileged, Responsive or Not Relevant, performing redaction as they went. When reviewers completed a batch they checked it in and assigned themselves a new one. Relativity's batch function prevented batches from breaking across custodians. By batching the documents, the team was assured that each document was only reviewed one time. Using this approach, eight reviewers got through the entire collection of 50,000 documents in five days.

Benefit: By using Clearwell and Relativity, the teams were able to exploit the strengths of each to facilitate efficient and accurate review. Clearwell's transparent search abilities allowed the reviewers to understand how search terms affected the returned document set. With such insight into the produced document set, they generated their responsive document set right out of Clearwell. Relativity allowed the review team to work through their collection in an ordered manner, releasing productions to opposing counsel as they completed batches. They were able to generate their first production in only a few days, with absolute certainty that documents would not be produced twice. The ability to monitor how rapidly they worked through batches also allowed them to forecast when they would be complete. This insight into manpower requirements kept them on track and on budget.