Solution Brief

StoredIQ for Legal™

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Introduction to StoredIQ for Legal™

Legal teams must wade through a rising tide of information to discover what is relevant for a specific legal matter. By targeting only the most important information, these teams can reduce the cost, risk, and time involved in an eDiscovery response. StoredIQ for Legal provides robust management of the eDiscovery process, from hold notification to identification, preservation, and collection.

StoredIQ for Legal enables legal teams to efficiently and confidently manage the full matter lifecycle and process compliance for thousands of matters. It allows legal teams to issue custodian hold notices and interviews with automatic follow-ups and escalations, manage preservation and collection activities conducted by IT. The solution also finds and analyzes unstructured information in place to gain faster insight into the scope of potentially relevant and the veracity of the matter. Legal teams can save time and gain flexibility by not having to move data before analysis. They can see data before collection, acquiring insights from data in a matter of hours versus weeks, and using that knowledge to make more informed business decisions. Legal teams can utilize StoredIQ for Legal in proactive and reactive eDiscovery processes.
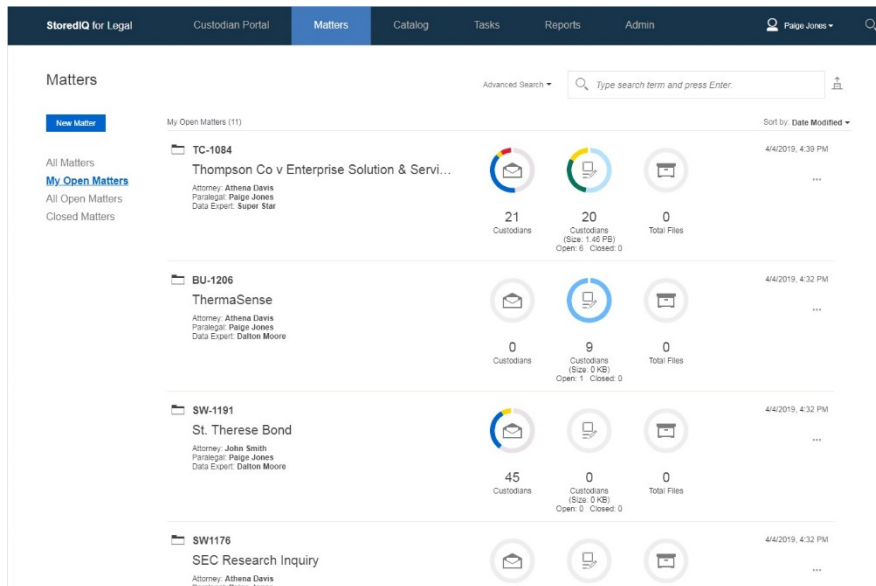

Figure 1. StoredIQ for Legal streamlines eDiscovery and collection processes.

Streamline management of the full matter lifecycle

Teams begin to realize the benefits of StoredIQ for Legal through the legal hold notification process. The solution helps reduce the spoliation risk from lack of process integrity, minimize manual mistakes and eliminate common legal hold notification oversights. With StoredIQ for Legal, team members can easily identify custodians and draft legal hold notices by drawing on templates. They can send those notices, conduct custodian interviews, solicit approvals and track custodian responses from easily configurable dashboards. And can then schedule and automatically send reminders to custodians about their ongoing duty to preserve, escalate non-responders and rapidly move from notification to requesting collection—all from the same interface.

If the reason for the hold turns into a formal legal matter, StoredIQ for Legal can streamline a variety of tasks for IT and non-IT users alike. For example, the solution helps IT users oversee the identification, collection, and preservation of all physical and electronic data relevant to the matter. Those IT users can execute the business and technical processes and the communications needed to preserve data in an approved manner. Non-IT users can easily send role-appropriate alerts, set action items, and produce reports.

Enhance the efficiency of eDiscovery management

StoredIQ for Legal *Notifications* provides legal staff an interface to manage hold notifications and conduct virtual interviews:

- Reliably send legal hold notices and track responses across thousands of matters.
- Automatically send reminders to custodians, including a consolidated reminder across matters and escalate non-responders.
- Send interviews and manage responses with automatically generated follow-ups. Manage by exception and utilize workflows to track approvals and follow-ups.

StoredIQ for Legal *Identification and Collection* offers several capabilities to help legal teams manage the eDiscovery collection process and reduce cost, complexity, and common collection inefficiencies, including:

- Manage eDiscovery collections from dozens of common data sources.
- Identify and analyze data in place before collection, saving costs and reducing risk by collecting and preserving only required content.
- Set collection criteria once, and apply everywhere.
- Identify and collect content in file shares, user desktops, email systems, archives, content management systems, collaboration systems, and Microsoft SharePoint.
- Track collection status and provide clarification throughout the process.

- Quickly search through data identified as potentially relevant to gain better insight into the scope and veracity of the matter

- Export collected content and original metadata to major review tools.
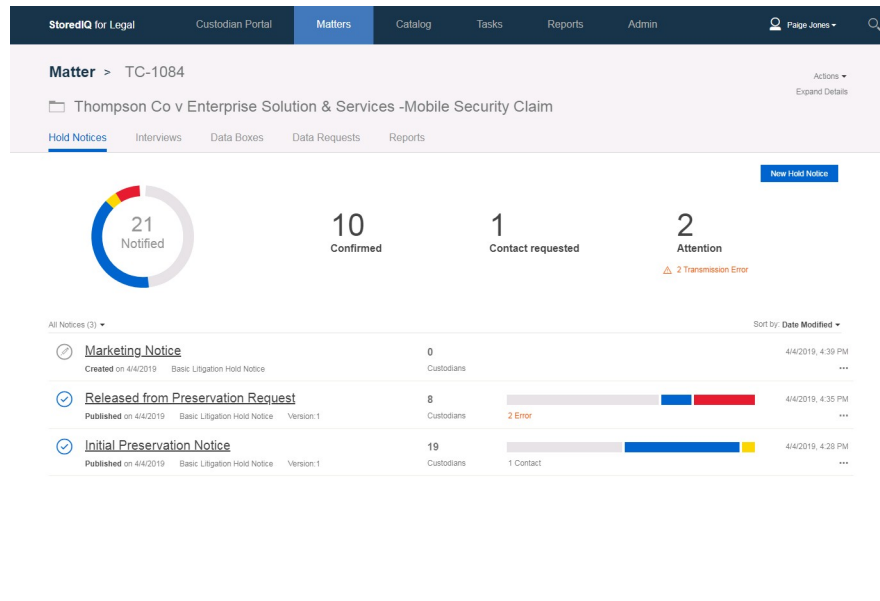

Figure 2. The StoredIQ for Legal Identification and Collection dashboard displays information in a clear, concise interface to maximize efficiency and productivity.

StoredIQ for Legal *Identification and Collection* helps IT and data experts:

- Receive and manage preservation and collection requests directly from legal in the same solution (See Figure 3).

- Find relevant content by metadata or full-text searches, or classify data with machine learning.

- Identify more than 450 content types, including nested content in containers, such as ZIP, PST, and NSF.

- Analyze content in place before collection to cull large data sets into manageable collections.

- Manage exceptions in an easy-to-use exception center that supports the ability to retry and reroute exception content.

- Provide collection status or ask for clarification from legal, all in the same interface. Export collected content and original metadata to major review tools.
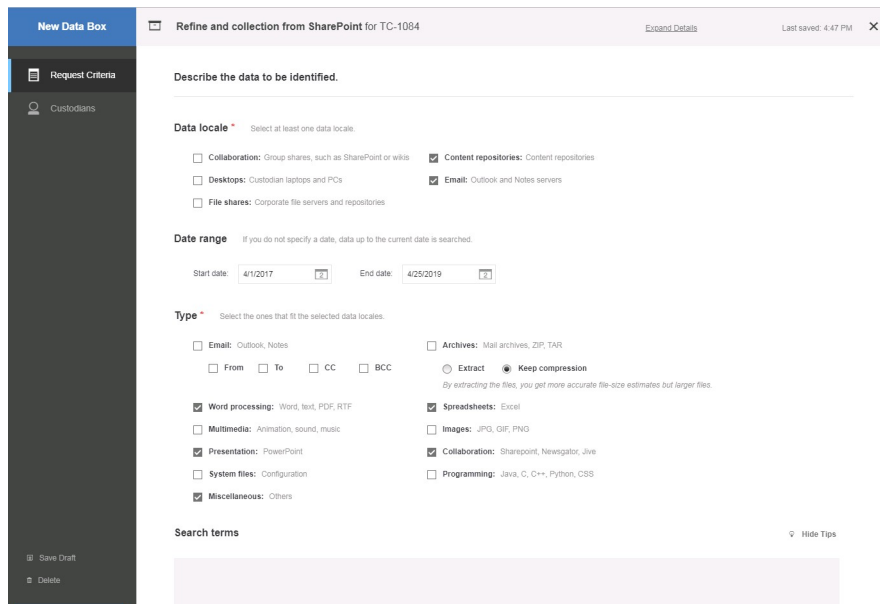
Figure 3. Legal teams can communicate identification and collection requirements in a repeatable and audited interface.

StoredIQ for Legal *eDiscovery* for IT helps organizations:

- Receive and manage preservation and collection requests directly from legal in the same solution.

- Manage the data request creation and fulfillment process with the correct details for legal and IT teams with a common understanding of request criteria, status, next steps, and outcome across all data sources.

- Utilize multi-data source, date range, and custodian criteria via fully customizable intake forms and fulfillment workflows.

- Track status and provide communication through the process.

- Capture results of the identification, preservation, and collection activities.

Generate precise insight to speed eDiscovery

In many organizations where no insight into data associated with a matter is available, a settlement is made with little to no information regarding its actual merits. StoredIQ for Legal is designed to accelerate the eDiscovery process and provide legal teams with insight into relevant data in place prior to collection. This capability helps litigators make more informed decisions about whether to settle or litigate. If litigation moves forward, StoredIQ for Legal helps determine which data needs to be collected and then collect the smallest legally defensible set of data.

Connect your data

From identification through collection, preservation, and production of vendor-agnostic, review-ready load files, StoredIQ for Legal supports legal teams with deep data analysis. The solution identifies, collects, and preserves active electronically stored information (ESI) from dozens of common enterprise data sources and more than 450 file types, including network servers, storage systems, laptops, and cloud-based data. And it does it all while avoiding disruptions to end-users.

Filter your data to create a custom data set

StoredIQ for Legal helps accelerate the understanding of large amounts of unstructured content through powerful search functionality, filters, and explorers. Data can be filtered or acted upon and refined using a visual heat map. Data explorers visually represent unstructured data from various points of view, such as file system metadata attributes, data source location, and category.

Defensibly present your eDiscovery workflow

Legal users can take action to collect data to a retention server, move data for archiving, export data for review, or delete data—with defensible actions and a full audit trail with StoredIQ for Legal. Data topology, overlay hit, term hit, duplicate, and data assessment reports provide valuable insight designed to help legal teams make more informed decisions about the scope and merits of a case prior to collection.
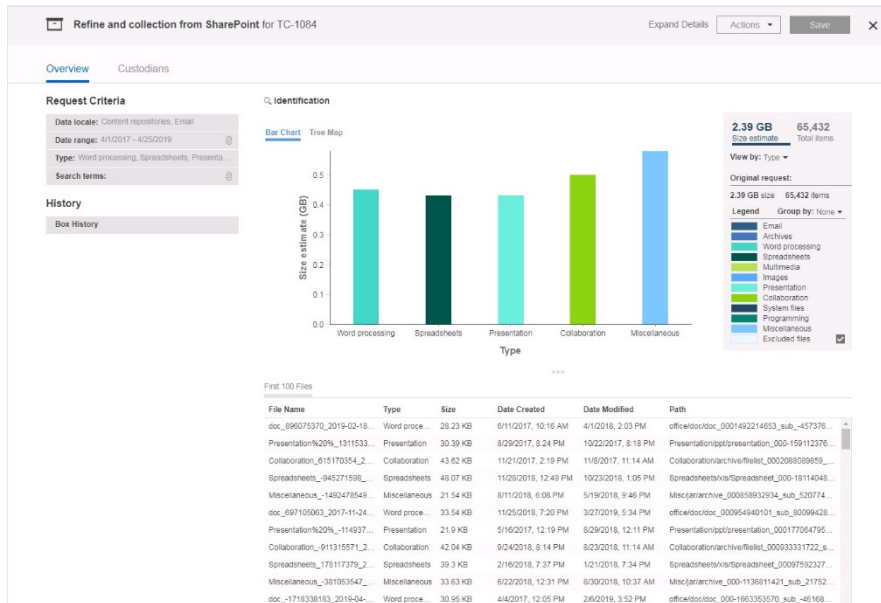

Figure 4. Get insight into potentially responsive data prior to collection.

Conclusion

StoredIQ for Legal provides the foundation for your ediscovery processes with litigation hold management, virtual employee interviews, and preservation and collection management. Corporate legal professionals can now automate and streamline their workflows with their IT teams and outside counsel in a legally defensible manner.

Learn more at www.breakwatersolutions.com.

Why Breakwater

Breakwater helps mitigate risk and gain insight from sprawling information by combining technology automation and human expertise. Our expert consulting, software, and managed services address the challenges within information governance, disputes and investigations, regulatory compliance, privacy, and cybersecurity. Our solutions allow governance, legal, and risk professionals to locate, access, analyze, and manage information by making data transparent and actionable. Breakwater helps clients in public and private sectors mitigate risk, improve productivity, and increase profitability by transforming how they use data.

Expert Consulting and Advisory

At Breakwater, we know there is always a better way. We innovate process and automation to create efficient and effective approaches to information intelligence. Our solutions drive speed to insight for our clients, enabling them to act quickly and confidently with their information, whether responding to legal discovery, improving compliance, or protecting sensitive data. And our results deliver measurable value—reducing risk, improving quality, and saving money.

Our consulting expertise includes:

- Information Governance
- Litigation & Disputes
- Investigations & Regulatory Response
- Cybersecurity, Privacy, Data Risk

Supported by Managed Services

The investment in technology automation supporting legal, compliance, security, and governance requirements can be maximized by leveraging experts during implementation and ongoing operation. Engaging an experienced managed services team with direct access to application developers is key to achieving your business objectives.

Breakwater offers flexible managed services solutions based upon your requirements, from implementation and transition to your team to full daily management and operation. Working with organizations worldwide in every industry, the Breakwater Managed Services team offers decades of experience in information governance and management. Companies use managed services to augment their internal teams to balance workload spikes and mitigate the risk of service disruption.