

Discovery and e-discovery processing

Automates the collection, processing, and review of electronic discovery materials from multiple sources, reducing manual effort and ensuring compliance with legal discovery requirements.

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Get Your Blueprint

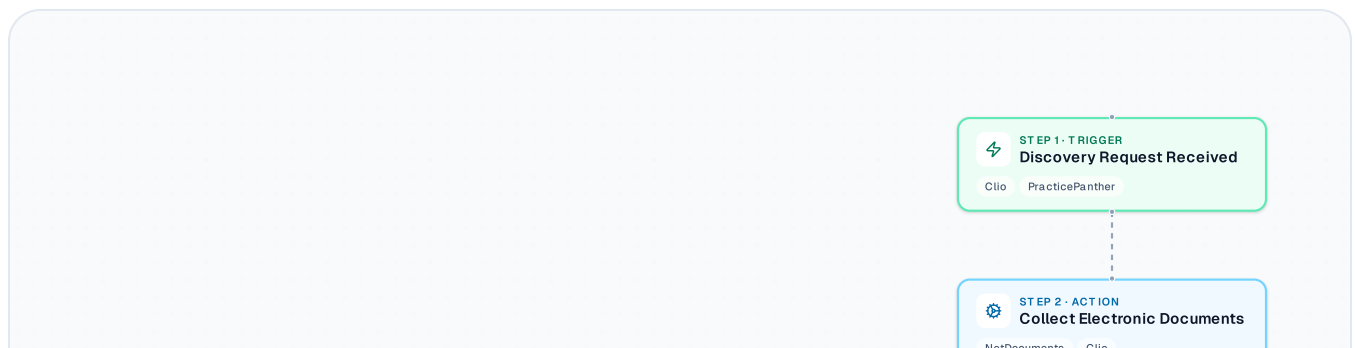


WORKFLOW TRIGGER

Discovery request or court order is received requiring document production

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

Discovery Request Received

Legal team receives formal discovery request or court order requiring document production. Case details and discovery scope are captured in the case management system.

Clio

PracticePanther

2

 ACTION

Collect Electronic Documents

Automated collection of relevant documents from client systems, email servers, and document repositories based on search criteria. Legal hold notices are automatically generated and distributed.

NetDocuments

Clio

3

 ACTION

Process and Index Documents

Documents are processed for metadata extraction, text recognition, and de-duplication. Files are indexed and organized in a reviewable format with privilege screening.

NetDocuments

4

 DECISION

Determine Review Complexity

System evaluates document volume, content sensitivity, and case complexity to determine if automated review tools or manual attorney review is required.

5

 ACTION

Conduct Document Review

Documents are reviewed for relevance, privilege, and confidentiality using AI-assisted review tools and attorney oversight. Responsive documents are tagged and categorized.

LexisNexis

Westlaw

6

 ACTION

Generate Production Set

Responsive documents are compiled into production-ready format with proper numbering, redactions, and privilege logs. Quality control checks are performed automatically.

NetDocuments

Clio

7

 OUT PUT

Deliver Discovery Production

Final production set is delivered to requesting parties with accompanying documentation and case records are updated with production details and billing information.

NetDocuments

Clio

LawPay



Outputs

- Production-ready document set with proper formatting
- Privilege log and confidentiality documentation
- Automated billing entries for discovery work
- Case file updates with production timeline



Key Metrics

- Document processing time reduction
- Review accuracy percentage
- Cost per document processed



Tools & Integrations

- Clio
- PracticePanther
- NetDocuments
- LexisNexis
- Westlaw
- LawPay

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