

## ECA, SELECTED

Planet Data's Exego Select filters documents early for greater efficiency.

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**CONTRARY TO POPULAR** thought, there's more to e-discovery than just document review. The processing phase of the E-Discovery Reference Model (EDRM) historically refers to the conversion of paper and files into static TIFF images, but today it offers a compelling opportunity to filter out worthless data that would be a waste of time (and money) to view.

Some call this early case assessment (ECA), or more fittingly early data assessment (EDA), referring to the practice of letting a computer help you exclude, filter and cull out files in much the same way we trust a computer to filter out spam. No one wants to waste time reading messages that are completely irrelevant to our daily workflow.

Planet Data developed Exego Select, a cloud-based, software-as-a-service (SaaS) platform for exactly this purpose. Exego Select sits between the company's Exego Extract ingestion engine and Exego Review platform.



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### A FILTER FOR YOUR THOUGHTS

Lawyers are always anxious to start looking at documents, but it's a woeful waste of time to tackle a review one document at a time. Lawyers must be savvy and discerning about the files they're

viewing, and Exego Select provides a window into their processed data.

Once your data is pushed through the Exego Extract platform to squeeze out every little morsel of metadata and text



from your files, you can log into Exego Select to search, filter, dedupe, sample, cluster, and cull data through an interactive and intuitive set of tools.

It's helpful to have a plan of attack as you start using Exego Select. For example, if your client sends you their entire inbox from the past eight years, you can use the Date Filter to select only the past three years. Date filtering sounds simple, but Exego Select offers additional options for restricting the date filter to only parent messages, or to when files were created or last modified.

Other filters let you carve out irrelevant file types or custodians. Exego Select can also parse out forensic images from mobile devices so you can exclude personal text messages you don't need.

If that's not enough, you can take a gander at the Cluster Filters to see what terms and concepts were plucked out of the files. You can click into a helpful pie chart of the terms, or an interesting "foam view," which shows the more prevalent concepts as larger colored blobs.

## REPORTING ON YOUR SEARCHES

If you'd rather start searching your documents instead of

clicking through filters, Exego Select offers a "quick search" bar along with advanced settings for stemmed and fuzzy searches. Even better, Exego Select is a powerful utensil for parties bickering over a list of search terms. Exego Select allows you to upload a text file of search terms, and then generates a meticulous "search analysis report."

The report details the number of hits found in each field of metadata as well as the number of hits from each custodian. For example, the report can reveal outlier terms that might appear in every email signature, so you can immediately refine the search list.

Exego Select also has a "concept search" tool, where you can paste two or three sentences from a relevant document and tell the platform to find similar documents based on that text. The option to pull "similar documents" is prevalent throughout the platform, letting you instantly act when you find a hot document.

Once you've narrowed down the corpus of files, you can click "select random documents" to pull a completely random set of files so you can check your work. This provides additional levels of confidence to

show your culling plans were effective and accurate.

The document viewer is also designed to give you useful insight into the file you're viewing. If you've arrived at a document based on a keyword or concept search, the resulting words/phrases/sentences are highlighted.

I also like the "show summary" option that pulls key concepts from a document in sentence or paragraph form. This gives you a general idea of the document subject without having to wade through long email headers or introductory paragraphs.

When used capably, the platform offers powerful, straightforward tools for generating a more relevant set of files you can ultimately load into a formal review tool such as Exego Review, Relativity, etc.

Exego Select provides smart litigators with much more intelligent methods of processing and analyzing data before they waste valuable time looking at worthless and useless documents. ■

