OpenText Managed Review

Balance costs, time and risk with optimized document review workflows based on review task and objectives

Benefits

- Optimize time to insight
- Mitigate risks with measurably higher accuracy
- Achieve time and cost savings of up to 80 percent
- Gain budget predictability

An increasing number of high-stakes circumstances require in-house legal teams and outside counsel to quickly review large volumes of electronically stored data (ESI) to fulfill legal obligations, minimize liability and risk and gain insights that inform strategy. These can include inbound or outbound productions in litigation, data privacy reviews, third-party subpoenas, regulatory document requests and data breach analysis and reporting.

Document review of large quantities of ESI is typically the most stressful, time-intensive and expensive part of the eDiscovery process. That stress is exacerbated by the typical one-size-fits-all approach that fails to properly assess and balance critical time, cost and risk factors.

The OpenText™ Managed Review Team delivers efficient managed review services for a wide range of scenarios. They leverage proprietary cloud tools, such as technology-assisted review (TAR) featuring continuous active learning and advanced textual and conceptual analytics, as well as QC protocols and project management. As an end-to-end eDiscovery solution provider, OpenText reduces reliance on multiple vendors and point solutions— streamlining data management, reducing risks and optimizing cost-savings.

Optimize time to insight

In document review scenarios, both in-house legal teams and external counsel need rapid access to key facts and evidence to inform early case strategy and optimize settlement advantages. With Managed Review, legal teams do not need to wait until after completion to gain access. The OpenText team quickly surfaces key insights using proprietary technology, analytics and unique processes that are then passed on to the legal team earlier.

These processes include rapid analytic investigative review (RAIR), a unique document aggregation and sampling methodology that provides extraordinary insight into the substance of a collection with just a fraction of the documents reviewed.

Mitigate risks with measurably higher accuracy and consistency

Managed Review improves quality and mitigates the risk of inconsistent coding, disclosure of privileged documents or missing critical evidence.

Improved accuracy with RAIR

RAIR, used alone or in conjunction with TAR yields high accuracy and precision—typically in excess of 90 percent.[1] RAIR also provides much more sophisticated and effective protection against disclosure of privileged or confidential documents.

Stringent quality control processes

The review team adheres to stringent procedures and quality control (QC) processes that result in such high accuracy and consistency that clients can reduce outside counsel QC from 20 percent to just five percent or less.[2]

Quantitative benchmarks create measurable goalposts against which to evaluate success, including recall and precision. By providing assurance that objectives have been met and a review can end, organizations avoid wasting time and money working longer than necessary.

Overcoming reviewer bias

OpenText TAR technology incorporates a unique contextual diversity algorithm to help overcome review bias and uncover documents that might otherwise be missed, alleviating fear of missing out.

1 OpenText, *Maximizing document review efficiency with rapid analytic investigative review,* 2022
2 OpenText, *The Anatomy of an Efficient Document Review,* 2021

OpenText eDiscovery Advisory Services

Get expert guidance on every aspect of the eDiscovery workflow for fast, high-quality and cost effective results.

Recon Investigations Service

Gain rapid insight into data that enables swift decision-making for investigations while saving money and time.

Digital Forensics and Collections

Defensible, cost-effective strategies and services for challenges ranging from deleted data recovery, data falsification investigations and IP theft to global data collection.

Breach Response Analysis and Reporting Service

Mitigate corporate risk and comply with breach notification requirements through expert discovery, analysis and reporting of exposed data.

Achieve time and cost savings of up to 80 percent

Managed Review delivers unparalleled efficiency on projects because the team expertly pairs OpenText proprietary tools with the specific processes needed for the most efficient review.

In some situations, it is unnecessary to put eyes on every document being produced. In these instances, such as responding to third-party subpoenas or producing documents for Second Requests or European Commission RFIs, the Managed Review team can apply pure RAIR methodology. This maximizes review efficiency, reducing total time and cost by up to 80 percent (compared to keyword search and linear review). It is over 20 percent more efficient than even the best TAR.[3]

Even when it is necessary to review every document before production, RAIR used in combination with TAR makes the TAR even more efficient. By aggregating sets of responsive documents, the OpenText team can eliminate a significant number of documents before the TAR even begins, speeding completion and lowering costs.

Ensure budget predictability

When budget certainty is paramount, OpenText offers upfront, fixed fee pricing for RAIR and TAR driven reviews. Experts scope out project parameters and requirements based on a sample of the document collection, eliminating the risk of cost overruns.

Only OpenText has the depth of technology, process and expertise required to assess the unique requirements and objectives of each review project. Differentiated review solutions optimize speed to facts and insight while achieving the optimal balance between risks and costs. Unlike other providers, OpenText is incentivized to provide the most efficient review by looking at as few documents as possible— keeping costs low while still achieving superior results.

3 OpenText, *Maximizing document review efficiency with rapid analytic investigative review,* 2022

OpenText Managed Review options at-a-glance

Review methodology	Description	Common use cases
TAR **Hourly or flat-fee options**	The review team leverages proprietary OpenText TAR technology featuring continuous active learning to expedite organization and prioritization of document collection	Litigation (both inbound and outbound productions) where it is **unnecessary** to review every document in the collection but **necessary** to review every document produced.
RAIR **Hourly or flat-fee options**	Small team aggregates characteristically similar documents within a large document collection. They are then managed as a group for purposes of final disposition e.g., production	Review projects where it is unnecessary to review every document being produced e.g.: • DSAR/ SRR data privacy review and reporting – including PII, PHI • Third-party subpoenas • Regulatory document requests such as antitrust matters, HSR second requests, European Union Requests for information (RFIs)
RAIR Prioritized TAR	Small team aggregates sets of responsive documents within a large collection prior to TAR	Litigation (both outbound and inbound productions) where eyes-on review of responsive documents is required
Modified RAIR	Increases efficiency of specialized reviews, such as breach analysis, by quickly moving only necessary documents to review	Specialized document review projects such as breach analysis and reporting
Linear review	Eyes-on, document-by-document review of the entire document collection	Recommended only where it is necessary to review every document in the collection (both responsive and unresponsive)

OpenText Managed Review options at-a-glance

Solution	Description
OpenText™ eDiscovery	End-to-end eDiscovery platform with proprietary analytics and technology-assisted review.
OpenText™ Core Insight	Cloud-based document review and analysis platform for projects of any size and complexity.
OpenText Professional Services	Engage an experienced team to manage the document review process from beginning to end.

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