

# 2018 eDiscovery BUYERS GUIDE

A **SOLO TO MIDSIZED** LAW FIRM SHOPPER'S HANDBOOK  
FOR eDISCOVERY TOOLS & SERVICES

Written By

**Brett Burney &  
Chelsey Lambert**

 **Burney**  
consultants

*Lex*

TECH REVIEW

ANALYSIS TRIAL PREP  
DESKTOP VS HOSTED TRANSCRIPTION DESKTOP  
CAPTURE REDACTION  
HOSTED SAAS FORENSICS  
IDERS SERVICE PROVIDERS IPAD TOOLS  
MENT COMMUNITIES CASE ANALYSIS  
KTOP VS HOSTED SAAS  
AL MEDIA EVENTS COMMUNITIE  
D FILE VIEWERS IPAD TOOLS EVE  
S PROVIDERS TRANSCRIPTION WEB CAPTURE  
NSCRIPTION REVIEW MANAGEMENT COMMUNITI  
IPAD TOOLS CASE ANALYSIS TRIAL PREP  
REP CASE ANALYSIS DESKTOP VS HOSTED REDACTION SAAS A.I. FILE VIE



# Processing & Review: Cloud-Based SaaS Platforms

Cloud-based SaaS document review platforms are the most significant development for small and mid-size law firms that need to utilize technology to review electronically stored information. While these SaaS platforms can't offer every feature and system option that you'll find in the larger hosted solutions, they provide the essential and fundamental tools to support the vast majority of matters without added complexity and confusion.

These platforms are so accommodating because firms no longer need separate (and costly!) tools to process, review, and produce documents. When a firm receives a PST file from a client, they can simply upload the files to the service right in their web browser - if you can upload a picture to Facebook, you can upload a PST file to one of these services. The platform performs all the processing on the data - indexing, OCR, metadata extraction, and more - and then loads the processed files into a easy-to-access database. Users can "tag" documents as relevant or privileged, and the platforms will walk you through creating a production set that can be sent to the opposing party.

The pricing on these SaaS platforms is even simplified because the vendors can take advantage of the lower prices of cloud-based distributed computing. This is always a critical concern for lawyers and their clients, and these services make it easy to pass along the per-GB, per-month fee on to clients.



# Lexbe - A COMPREHENSIVE CLOUD-BASED PROCESSING AND REVIEW PLATFORM FOR DIY FIRMS



From the beginning, Lexbe has focused on the DIY approach for data processing and document review - they realize many litigation teams prefer to tackle eDiscovery on their own either because they need to keep costs down or the desire to maintain control over all aspects of their matter. But when you get behind, you can call Lexbe's professional services team to get back on track.

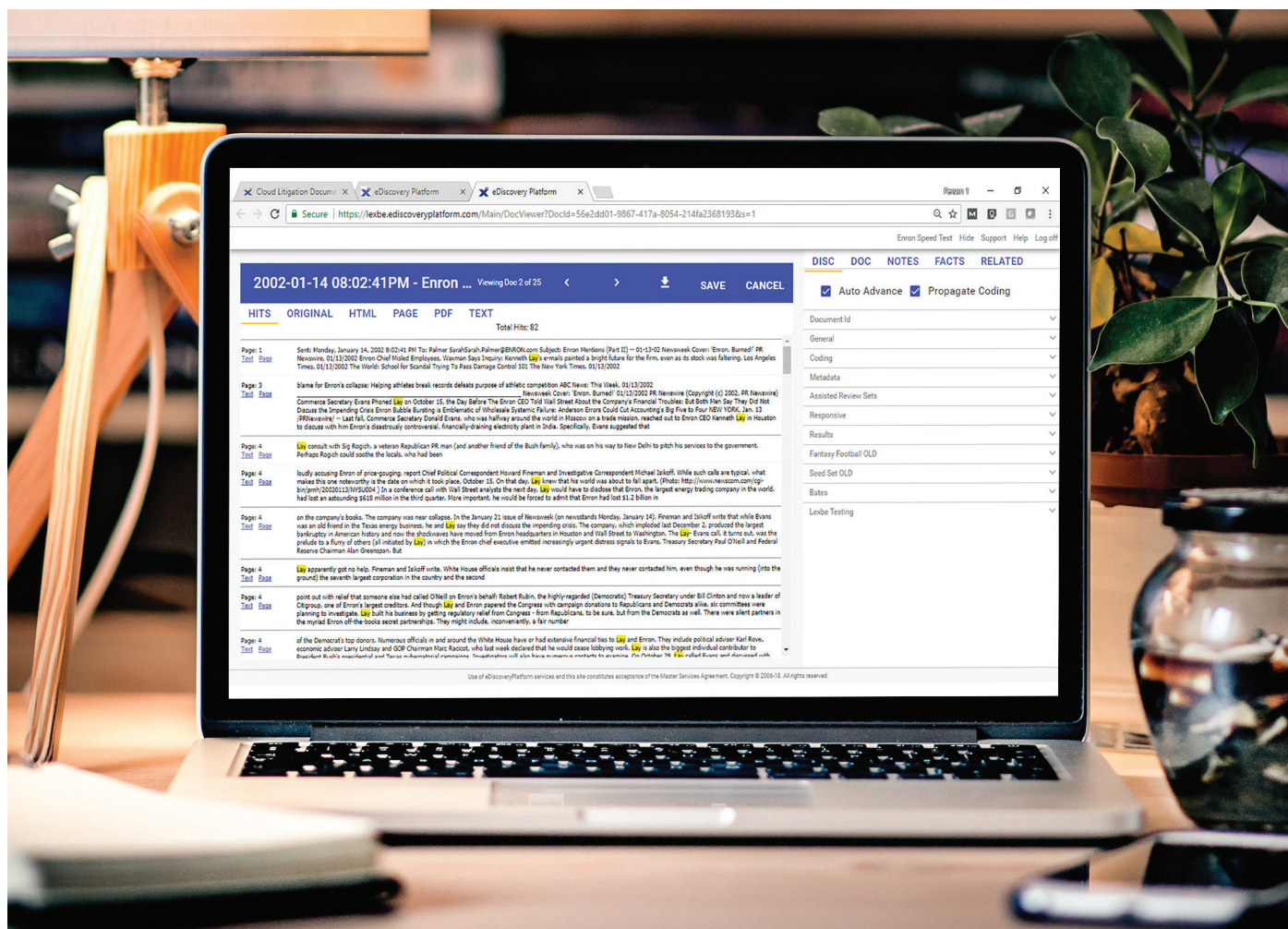
Lexbe was one of the first cloud-based platforms that empowered small and mid-size firms with the ability to tackle document review projects without a substantial outlay for purchasing software and hardware or specialized training.

## Uploading & Processing

Lexbe recently overhauled their main platform interface to streamline functions and help fuel their DIY mission. Lexbe has always featured a simple

and intuitive interface, and the main method for navigating the interface is through tabs at the top for Case, Analysis, Search, Browse, Discovery, Management, and a few more.

“Lexbe was one of the first cloud-based platforms that empowered small and mid-size firms with the ability to tackle document review projects without a substantial outlay for purchasing software and hardware or specialized training.”



The “Case” tab is where you upload files for processing and ingestion into the system. You can simply upload a .PST file, or if you have multiple electronic files Lexbe recommends that you compress them into a single .ZIP file before uploading. If you can upload a picture to Facebook, you can upload data to Lexbe.

### Browse & Review

After your data is processed, most users will click to the “Browse” tab to be presented with a linear list of files and documents. You can customize the columns and fields of information that appear in the list. You are welcome to start reading through the first document and go through the whole list but that’s usually not the best use of your time.

Instead, you should use the Filters on the left side of the screen to quickly drill down into a set of documents that may be more important, such as documents from a specific custodian, or from a specific date range, or just specific files types (e.g. Microsoft Word documents or PowerPoint presentations). Documents in a filtered view can also be sorted by date - if you’re looking at email messages the attachments are displayed immediately after the main message.

One of the best additions in the updated interface is the conspicuous yellow bar at the top of your document list that shows you exactly what filters are being applied to the documents you’re viewing. As you apply filters to your data, the yellow bar keeps track so you know exactly what you’re looking at all times.

Even better, the set of filters that you apply to the data can be saved for future use, and they can also be shared with other members of your team. The ability to share your filtered document lists with other members of your team is an extremely powerful feature to promote collaboration.

### Search

Lexbe incorporates all of the major features you need in a comprehensive search tool for eDiscovery. You can perform a simple, Boolean search in the provided search box on the left, or elect to toggle on the advanced options to run concept, fuzzy, or stemming searches. You can apply your search to specific metadata fields, or you can combine a saved filter with your search to further narrow down the collection of documents you need to review.

All of those searching features are great, but Lexbe has kicked it up a notch with their new **Uber Index**. While most search tools will certainly index the

metadata and visible contents of files, Lexbe’s Uber Index goes a bit further and will OCR any images that contain text embedded into Microsoft Word documents or PowerPoint presentations so you can search that text too (which could be extremely important!). The Uber Index also contains the translation of any non-English characters found in the documents.

*“All of those searching features are great, but Lexbe has kicked it up a notch with their new Uber Index. While most search tools will certainly index the metadata and visible contents of files, Lexbe’s Uber Index goes a bit further and will OCR any images that contain text embedded into Microsoft Word documents or PowerPoint presentations so you can search that text too (which could be extremely important!).”*

### Viewing Documents

Clicking a document opens it in a new tab in your web browser. This is helpful if you’d like to drag the tab over to a second monitor to view a document while keeping the database list open on your first monitor.

A set of tags at the top of the document lets you select which view of the document you want to see. The “Original” view allows you to download the native file of the original document if you need to open it in its native application (e.g. a Microsoft Excel spreadsheet must be opened in the Microsoft Excel software). Often this step won’t be necessary since Lexbe offers other tabs with extracted native text and the PDF tab.

The “PDF” tab is where most people will spend their time because it presents the best representation of how the original document looks without having to open the file in its native application. The “Text” tab shows you all of the text that was extracted from the document, including any additional text that the Uber Index picked up. Lexbe also offers “Produced” and “Redacted” tabs that show you the documents with a Bates stamp or other endorsements, or the documents with the redactions burned in.

A panel to the right of the document contains tabs that correspond to what actions you want to take on the document. The “Discovery” tab is where you tag a document as responsive or privileged, and the “Notes” tab lets you type out any thoughts you have on the document. Lexbe even lets you apply notes to a specific page of the document. You can find a list of all your notes by clicking “Case Notes.”

The “Related” tab reveals any members of a document family (e.g. parent email message or sibling child attachments). This is also where you can see any duplicates of the document from the database as well as “near-duplicates.”

One of the most impressive features included in Lexbe is their case analysis tools. When you’re viewing a document, you can click the “Facts” tab in the right panel which allows you to link the document to a chronology. You can create new facts under the “Facts & Issues” section and view your chronology there as well.

### Exports & Productions

Continuing in the DIY tradition, Lexbe lets you create your own exports and production sets once you’re done with review. If you have a basic understanding of creating electronic production sets, you’ll be fine. If you need any assistance, just contact Lexbe’s Professional Services Team.

Clicking “Export” on the left panel offers two options: you can “Export Log to Excel” or “Export to Briefcase.” The Excel option creates a nicely formatted spreadsheet with all of the fields you choose to include. You can search and sort the spreadsheet and there’s a hyperlink included for each document that will take you into the Lexbe platform if you have the proper credentials.

Clicking “Production” on the left panel starts a wizard that walks you through the process where you choose the format of production (PDFs, TIFFs, etc.) and whether you want any stamps applied (Bates, confidentiality endorsements, etc.). Lexbe has an excellent validation step to ensure the right documents are included so that you’re not producing any files that have been marked as privileged.

### Pricing

Lexbe offers plans starting at \$25 per GB per month, but you should contact Lexbe to determine the best plan for your needs. The “Flex Plan” is month-to-month, but the Subscription Plans are less expensive based on tiered discounts.

### Who Is Lexbe?

Based in Austin, TX, Lexbe provides companies and law firms with a web-based eDiscovery Platform that is easy to use, without sacrificing any of the features that litigation professionals expect in best of breed review software.

### Why You Should Consider Lexbe...

- The Uber Index throws a much wider search net including performing OCR on embedded images inside documents and presentations.
- Documents can be associated with “Facts” that get aggregated into an easy-to-access Chronology.
- The “Case Assessment” feature can generate reports for a multitude of components including document count by custodian, file sizes by extension, and much more.
- Lexbe offers excellent training resources to ensure clients are set up for DIY success, and their Professional Services Team is ready to help answer any questions you have about the platform.

**“One of the most impressive features included in Lexbe is their case analysis tools. When you’re viewing a document, you can click the “Facts” tab in the right panel which allows you to link the document to a chronology.”**

### Try Out Lexbe For Yourself!

Click [here](#) to view a Lexbe [demo on-demand](#).





# The Authors



**Burney**  
consultants

**Brett Burney**



*Lex*  
TECH REVIEW

**Chelsey Lambert**

Brett Burney is Principal of Burney Consultants LLC where he focuses his time on bridging the chasm between the legal the technology frontiers of electronic discovery.

Prior to establishing Burney Consultants, Brett spent five years at the law firm of Thompson Hine LLP in Cleveland, Ohio, where he worked extensively with litigation teams in building electronic document databases, counseling on electronic discovery issues, and managing the technical responsibilities of presenting electronic evidence at trial.

Brett is a featured speaker at numerous legal technology conferences and is a well-respected author on legal technology topics.

Chelsey Lambert is a Legal Technology Specialist, published Author and CLE Speaker. Over the course of more than a decade serving solo, small and mid-sized law firms she has seen the challenges of both selecting technology and training staff how to use it.

As a former Practice Management Advisor for the Chicago Bar Association, and VP of Marketing for a leading Case Management Platform Chelsey also works with vendors to appropriately price or modify their products to suit the needs of the solo to mid sized law firm user.

In 2017 Ms. Lambert published the nearly 200 page 2017 Legal Technology Buyers Guide, which has been downloaded by thousands of law firms worldwide

## The Mission

Brett Burney and Chelsey Lambert originally met at a CLE Course delivered at the Chicago Bar Association in 2014. Both experienced speakers and legal process specialists they share a passion for helping solo, small and mid-sized law firms tackle challenges with technology.

In late 2017 Lex Tech Review published the first edition of the Legal Technology Buyers Guide. To which attorneys, paralegals and litigation professionals responded to with requests for more information on products specific to the eDiscovery process.

The opportunity to collaborate was clear. The team quickly recognized a need to create a handbook for solo, to mid-sized law firms that would help them navigate the myriad of eDiscovery products, service providers and resources.

Driven by a motivation to demystify the assumption that there are few options for law firms in this segment of the market, Brett and Chelsey set to work. First, by selecting the organizations who cater to law firms from one to one-hundred-fifty employees. Second, by vetting the providers through interviews, product demonstrations and research.

The result, is the inaugural edition of the eDiscovery Buyers Guide. Accompanied by a dedicated website, blog, and YouTube Channel. Where the authors will continue to share valuable insights and information on tools and service providers that understand the needs of solo to mid-sized law firms.



Subscribe to our YouTube Channel:  
**eDiscovery Buyers Guide**



Follow us on Twitter:  
**@eDiscoveryBuyer**



Like us on Facebook  
**eDiscoveryBuyersGuide**

[www.ediscoverybuyersguide.com](http://www.ediscoverybuyersguide.com)