

eDiscovery/electronic record search tools

eDiscovery tools can be feature rich

- Focus on Custodial data sources

- Litigation approach

- Can be complicated to learn and use

Records Managers need balance

- Focus on Records

- SMEs may limit need to search for specific documents

- Need something easy to learn and use

In theory, an organization's Records should be kept in a limited number of places

- Records Managers need to be able to quickly and easily search these locations for relevant data

- Incorporate information from SMEs

- Potentially incorporate email and other sources of information

Exterro is wizard-driven

- Simple yet powerful search options

- Single step to collect, process, index, and load data, allowing for automation

- Additional search capabilities once loaded for review

Case processing tools (including the collection of records to review for redaction and posting accessible 508 compliant releases)

Exterro has a FOIA/Public Records Request Module

Requester Portal

- Configurable request form -- Ask requesters for what YOU want

- Requesters can track progress

- Requesters can obtain their documents

- Documents can be made “public” for anyone to access, limiting the need to respond to repeated requests for the same information.

User Portion

- Automatic workflows based on requester information

- Use of full Exterro collection tool set

- Review and Redaction within the Exterro eDiscovery module – including individual redactions, auto-redaction, redaction labeling, and Vaughn index generation.

- Document can be provided to requesters with minimal clicks on the Agency side

Redaction tools (including tools that allow for automatic redaction of similar forms and record types including paper, digital content, videos, data, etc.)

With the Exterro platform, users can redact on the native version of the files and move and manipulate the redactions up until the point where those documents are provided to the requesters, at which point the redactions are burned onto the produced version of the document.

Exterro allows for manual redaction in 3 ways:

- Large rectangle – a black box can be drawn on the document to cover any rectangular area

- Text highlight – redactors can use a highlight tool to cover lines of text in a redaction

- Full page – redactors can block one or more entire pages of the document

Manual Redaction can have a reason code branded onto the redaction. Multiple codes can be used to describe redactions on a page.

Automatic redactions can be performed based on key words/phrases or regular expression.