

# Exterro Fusion™ Discovery Workflow Management 4

## Integrated Legal Project Management

Exterro Fusion™ DWM delivers control, oversight and predictability to the e-discovery process

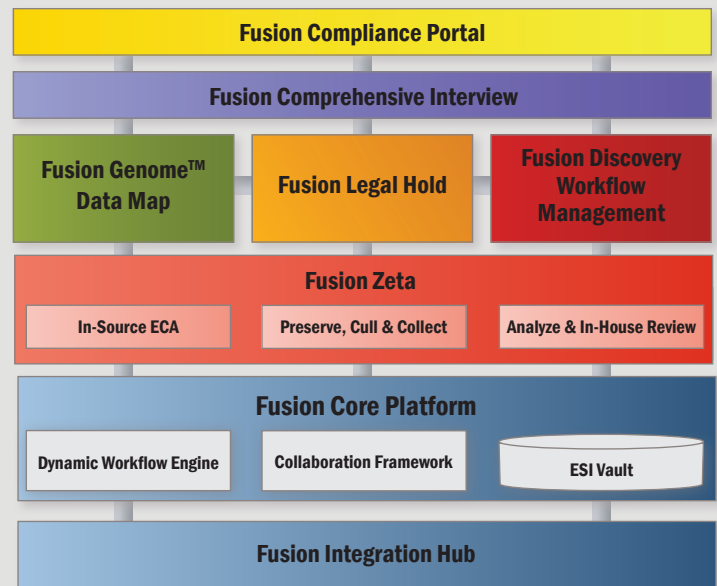
Exterro Fusion™ Discovery Workflow Management is a comprehensive e-discovery process management solution that connects people, processes and technology. DWM manages all e-discovery activities including collection, processing, review and production. Out-of-the-box workflows deliver task details, timelines, deliverables, budgets and historical repositories for each EDRM stage. Legal project managers rely on DWM's fully defensible, auditable process to drive cost savings at each stage of the EDRM.

Seamless integration with third-party solutions for storage, collection, processing and review, HR solutions, and asset management applications position DWM as an essential part of a best-of-breed solution. It uses information gathered by Fusion's e-discovery hub and also pushes information back to point tools to keep projects moving. The result is a streamlined, fully defensible system that delivers cost savings at each EDRM stage. DWM manages discovery processes outside the realm of electronically stored information, including paper evidence collections and custodian depositions.

The Exterro Fusion software suite offers IT infrastructure and EDRM tool integrations, dynamic data mapping, litigation holds, a robust interview module, and a custodian compliance portal. DWM leverages the Fusion core platform to deliver visibility into project progress, resource utilization, costs and deadlines.

“ The impact DWM provided on overall performance was impressive. Ease of use, detailed tracking mechanisms and constant collaboration aided user adoption. Work product advanced to a new level, and Fusion enforced compliance, delivered consistent, centralized documentation, and repeatable procedures, reduced errors and reduced staff onboarding time. ”

– Randy Girouard  
Manager of Automated Legal Services  
Haynes and Boone LLP

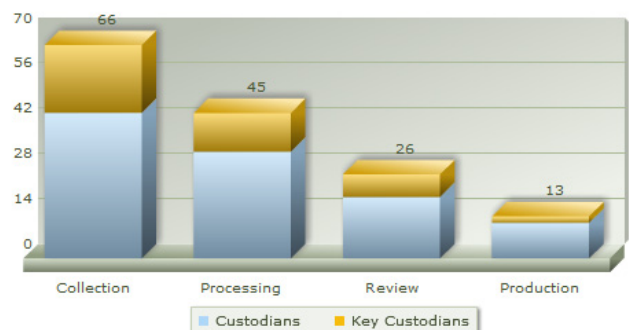


## Exterro Fusion™

Built to reflect how legal and IT teams think

Exterro Fusion is an integrated solution suite backed by the full power of the Exterro Fusion workflow and data management platform. Its collaboration framework, dynamic workflow engine, secure ESI vault and audit trails enable efficient execution of end-to-end e-discovery projects. The Fusion Integration Hub allows all Fusion solutions to integrate with the IT infrastructure already in use, like HR or asset management systems, as well as other EDRM tools. With Exterro Fusion, legal and IT teams get the benefit of the legal industry's most trusted platform and its 360-degree visibility into and control over all litigation tasks and projects.

Cross Matter Custodians



To learn how Exterro can deliver value to your organization, contact an e-discovery expert at [info@exterro.com](mailto:info@exterro.com) or call 877-EXTERRO.

# Features and Benefits

**Easy Setup and Requirements Capture:** Quickly design e-discovery projects and create work orders using preformatted, customizable templates

- **Project Specifications:** Save time and gain control with configurable questionnaires that provide an auditable framework for communication that embodies best practices. Includes version control, audit trails and change management.
- **Specification Design Center:** Drag and drop customizable specifications to build reusable work orders and projects.
- **Key Custodians and NCDS:** Prioritize collections from key custodians and NCDS, accelerating delivery of key information critical for effective early case assessment and resource allocation.
- **Legal Hold Auto-Populate:** Quickly start collections projects using legal hold information from Exterro Fusion™ Legal Hold and/or a third-party solution.

**Control and Visibility:** Actionable insights drive defensibility

- **EDRM Dashboard:** Gain an executive-level dashboard view into and across matters, information, custodians, projects, schedules and EDRM phases. Delivers unprecedented business intelligence capabilities, including:
  - **Discovery Landing Page:** Ensure deadlines are met through at-a-glance workflow visibility into custodians, deliverables, issues, notes and ETA both at overall project level and at workflow stage level across all matters. Exception reports give legal teams immediate visibility into problem areas that require prompt attention.
  - **Consolidated Chain-of-Custody Log:** Track movements of evidence within and across projects with project-level chain-of-custody logs.
  - **Issue Management:** Track, issue and communicate resolution steps to team members with an advanced messaging system to meet deadlines.

**Fully Integrated Resource Management:** Total oversight over internal and external suppliers' performance

- **Resource Registration and Comparison:** Evaluate vendor service offerings and prices with vendor input portal. Evaluate vendors based on configurable units of measure that provide an "apples-to-apples" cost comparison, turnaround times and ratings.
- **Auto-Notification:** Receive real-time notifications through an SMTP email integration that sends notifications to project managers when events require attention or follow-up.

**Business Intelligence and Planning:** Advanced reporting and intelligent dashboards deliver critical information

- **History Management:** Record all discovery efforts. Reports deliver insight into data sources and custodian activity past and present, reducing exposure and eliminating wasteful re-collections.
- **Custodian and Data Source Discovery:** View and report on discovery activity at custodian and data source level, including activity with EDRM tools, highlighting prior collection, processing, review and production efforts.
- **Matter Dashboard:** Access third-party tools and resource teams' project progress through a single platform. Analyze discovery trends, phase details, and litigation funnel.
- **Cost Management and Projection:** Forecast actual budget, and track spending and variances right down to the resource level. Control costs and avoid unpleasant project surprises with flexible resource planning and management capabilities, including multiple units of measure.
  - **Budget Templates:** Quickly and accurately create multiple budget templates for all tasks, matters and projects with auto-populated cost estimates.
  - **Project Cost Estimation:** Price out projects based on accurate data. Cost variance alerts enable you to get back on track when cost overruns occur. Present facts to court to support a burdensome cost and cost-shifting argument.

## For Legal

- Delivers control over and visibility into the entire e-discovery process
- Drives predictability into budgets and timelines
- Provides auditable defensibility
- Rapid service delivery
- Promotes early case strategy decision-making
- Reduces cost through effective vendor management

## For IT

- Quick implementation
- Delivers clear, actionable work orders
- Easier resource and workload management
- Comprehensive reporting
- Critical IT asset

## For Executives

- Cost controls: Prevents overruns and surprises
- Rapid delivery of results
- Reduces legal risk and exposure

## CONTACT EXTERRO

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