



Everlaw, Inc.

G-Cloud 15

Lot 2b

Software as a Service (SaaS)

Service Definition

Everlaw Self Service Cloud Software for Edisclosure and Ediscovery

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1. Introduction

Company Overview

Everlaw helps organisations of all sizes in the public, private and third sectors to navigate the increasingly complex internal and external ediscovery / edisclosure landscape. Everlaw helps organisations to chart a straighter path to the truth using end to end self service software, in the course of inquiries, investigations, litigation, arbitration, tribunal, regulatory or other work requiring these capabilities.

The company was founded in the United States in 2010, and now has more than 450 employees worldwide. It is headquartered in California, and has had a fully staffed office in the United Kingdom since early 2018.

Value Proposition

Everlaw's combination of intuitive user experience, advanced end-to-end enterprise-grade technology, and partnership with customers empowers organisations of all types to tackle the most pressing technological challenges and transform their approach to edisclosure / ediscovery in the process.

Everlaw addresses the entire edisclosure / ediscovery lifecycle - from data ingestion through to matter conclusion. By eliminating the need to acquire and manage multiple different technologies for a single workflow, Everlaw greatly reduces the high cost, lack of budget predictability, and risk associated with a fragmented technology approach.

Traditionally, buyers have been forced to choose between outsourcing all work to external service providers or building out costly internal teams to manage complex technology systems. By bringing Everlaw in-house, buyers take control of their data and processes, owning a unified platform for inquiries, investigations, litigation, arbitration, tribunals, DSAR/ SAR, FOI and regulatory matters, with the ability to outsource as much or as little of the workflow as desired, without sacrificing transparency, security, or economy.

Everlaw's attention to user experience has also created a technology that users of all different backgrounds can easily learn and use. This enables users to be more self-sufficient in reviewing and organising documents, as well as enabling them to have more oversight of the edisclosure / ediscovery process rather than outsourcing and relying on a 3rd party vendor.

The end result of this is that the buyer has the potential to increase efficiency by enabling their teams to carry out more work in-house that traditionally needed to be outsourced to a vendor, and reducing lag time to ensure deadlines are met.

Everlaw's Unified model, as set out in more detail in our Pricing document, offers buyers a way to use the core Everlaw product together (optionally) with EverlawAI (and potential

future products) with a single contract and single commitment. This includes all Everlaw data hosting and storage options and EverlawAI Assistant:

Active (Review)	Use Case on Everlaw / Data that needs to be actively reviewed, applying work products such as codes and redactions
ECA	Use Case on Everlaw / For newly received or not-yet-ready data, full visibility and search are available, with active review beginning once meaningful codes are applied
Suspended	Use Case on Everlaw / For inactive periods over 30 days, projects can be paused and instantly revived with all data and analytics preserved
Archive	Use Case on Everlaw / Lower cost, long term storage option, with all data and analytics preserved, with reactivation fee
Staging Drive	Use Case on Everlaw / Highly secure, structurable repository for native documents prior to promotion to either Active (Review) or ECA environments
Everlaw ^{AI} Assistant	Use Case on Everlaw / Access generative AI features to accelerate review, analysis, and legal drafting

ECA on Everlaw, for example, allows customers to host data at a lower cost in a staging environment. Documents are processed and imaged upfront, so you can make full use of the ECA environment's robust search and data visualisation capabilities -- allowing you to zero in on the right documents for review, a lot more accurately and efficiently than in traditional ECA environments, that usually just offer simplistic search across only text and metadata. Most importantly, though, ECA on Everlaw is just that -- it's part of the same unified, enterprise-grade Everlaw platform all customers have access to, so there's no effort or time wasted in toggling back and forth among multiple processing, ECA, and review environments -- instead, you just directly promote documents in bulk from the ECA environment into the active review environment. Ultimately, you're saving on not only data hosting costs, but also valuable attorney time.

Everlaw has dedicated resources in the form of our Customer Experience team to help ensure users are up and running quickly and are maximising their use of the platform. This includes a User Education team, which carries out both standing and custom training, a live Support team available 7 days a week, a Data Ops team to help with more complex data needs, and a dedicated Customer Success Manager. In addition to helping coordinate onboarding and workflow consultation, the Customer Success Manager will also track your feedback and provide that to the product team to help develop our product roadmap.

What the Service Provides

To support our value proposition, Everlaw provides a unified, feature-rich platform under a single contract and financial commitment. All core capabilities within our service scope are

available through your Everlaw subscription, with EverlawAI offered under the same unified commercial model rather than through a separate agreement or add-on modules.

Features/ functionalities:

1. Drag and drop/ cloud connector native document uploads; automated processing:

- / Everlaw has a cloud-processing system that automatically processes and ingests native files into the platform. The system will also automatically extract metadata and text for your native data.

Everlaw supports a wide range of native file types (including Emails, Word, Excel, PowerPoint, PDFs, etc.; a full list is available [here](#)).

Depending on the data source, whilst drag-and-drop uploads are available for simplicity and flexibility, Everlaw also enables users to utilise cloud-to-cloud transfers to avoid downloading and re-uploading large volumes of data.

Supported sources include direct cloud application integrations with applications such as Microsoft (O365, and Purview for data preservation data), Slack, Zoom, Zendesk, Asana, Jira and Salesforce where Everlaw provides dedicated connectors that preserve important context and relationships in the collected data; also direct cloud storage integrations with Microsoft (OneDrive and Sharepoint), Google (Google Drive and Google Vault), Box, Dropbox, Sharefile and also the ability to use direct links.

For data preservations, Everlaw can integrate with Microsoft Purview; Everlaw users can create, track, and release Microsoft Purview holds within Everlaw, and view these preservation-in-place objects alongside hold notices pertaining to the same matter. See section 7 below for more information.

Everlaw also provides an Application Programming Interface (API) that enables integration with other business applications and systems as set out more specifically elsewhere in this RFP response. Please refer to the [API](#) section of this document below for additional information.

If a download / upload is required in a specific scenario, Everlaw uses transfer accelerators to upload to Amazon Web Services (AWS) (no plug-ins or additional applications are required), and once data reaches our servers, we automatically process data at up to 900k documents per hour.

Automatic processing also includes automatic de-NISTing of documents and the other activities that follow.

- / With Everlaw's ECA functionality (which is included in all Everlaw G-Cloud subscriptions), when uploading and processing documents, users have the

option to either upload data into ECA (at a reduced cost, as set out elsewhere in this listing), or directly into Active Review. These two environments are linked for seamless workflows, and have an identical look and feel. The difference is that ECA projects have limited functionality, however all Everlaw features are available within Active Review in an ECA database.

If documents are loaded into ECA, they can subsequently be promoted to Active Review (there is the option to promote a curated subset (using searching, filtering, clustering etc.)), or users can promote all the documents from ECA to Active Review in appropriate circumstances. Users are also able to demote documents.

There is no additional cost to promote documents in this way, however once promoted they will be charged at the higher Active Review rate (and vice-versa for demoted documents) as set out in our Pricing Document. This enables users to interact with Everlaw in the most efficient manner possible, and our Customer Experience team can assist with understanding scenarios that may yield cost savings by fully utilising this feature/ functionality.

Examples of features that are available in ECA projects include Search Term Reports, Instant Visual Search, Data visualiser, Clustering, Results table, Review window and Binders. The features that are not available in ECA are generally those that are associated with review, such as being able to add Categories and Codes to documents (tagging), Redactions, Predictive Coding, Productions and Storybuilder.

For avoidance of doubt, once a document is promoted from ECA to Active Review, users will then be able to use Everlaw's full feature/ functionality set.

Additional data environments are also available in Everlaw, and are fully integrated into your platform experience:

- / Suspension; for inactive periods over 30 days, projects can be paused and instantly revived with all data and analytics preserved
- / Archive; lower cost, long term storage option, with all data and analytics preserved, with reactivation fee
- / Staging Drive; Highly secure, structurable repository for native documents prior to promotion to either Active (Review) or ECA environments

The details of these are set out in our Pricing document.

2. Automatically identify duplicates, near duplicates, email threads and foreign languages:

As part of Everlaw's automated processing, the platform automatically identifies, groups, and visualises duplicates, near duplicates, email threads, and foreign language documents. This helps underpin a defensible, repeatable and easy-to-understand process.

In addition to grouping, Everlaw provides a dedicated Difference Viewer that allows users to review entire near-duplicate groups from a single interface. Difference Viewer displays only the unique text across the group, anchored to a chosen reference document, so reviewers can efficiently compare versions, apply coding and redactions, and understand differences without opening each document individually.

3. Automatically transcode/ transcribe audio/ video, spot translate foreign language documents:

As part of Everlaw's automated processing, we automatically transcode and transcribe audio and video in-platform (currently supported languages are English and Spanish).

We also enable spot translations through our chosen providers at no additional cost. As these are external providers, it is possible to restrict use of this feature to prevent data leaving the platform in this manner.

4. Automatic extraction of metadata, text and Optical Character Recognition/ OCR:

As part of Everlaw's automated processing, we automatically extract metadata and text from documents (including password protected documents where passwords have been entered during processing).

If text is not present in a PDF (or it is a low-text PDF), or a TIFF, we will automatically perform optical character recognition (OCR) on those documents to enhance your experience in-platform.

5. Simplified search, filtering and exploration of documents and metadata, RAG:

Uploaded and automatically processed data can then be searched using Everlaw's advanced searching capabilities. Everlaw has two primary textual search tools to assist with data exploration:

- / Search Term Reports (STR)

STRs allow users to run multiple content and/or metadata searches simultaneously. High level information is provided to users about the number of documents that hit on any of the searches within a STR.

Using STRs, users can explore the documents in their project during early stages of the matter. STRs are, for example, helpful for analysing and/or identifying documents that fall outside a specified date range, or for triaging your review and creating assignments.

STRs also enable persistent highlights, even over proximity searches. Batch redactions can also be created from context searches (including regular expressions) in STRs.

STRs can be customised, saved and shared by users in-platform, and can also form part of case templates.

/ Instant Visual Search (IVS)

IVS features an intuitive, visual drag-and-drop mechanism for building queries. While you are building your query, results are generated in real-time and displayed in the Instant Search Preview.

Searches are, for example, helpful for analysing and/or identifying documents that fall outside a specified date range combined with other criteria, such as custodian or party information.

IVS can be customised, saved and shared by users in-platform.

/ Retrieval-augmented generation (RAG)

Please refer to Section 9 of this document below in respect of EverlawAI Deep Dive functionality.

6. Categorise and code, redact, batch redact, highlight and annotate documents:

Easily create custom categories and codes to be used to tag/ classify documents as part of a review. Categories and codes can also form part of case templates for frequently used combinations of these (e.g. for relevance, privilege, confidentiality, common issue coding etc.).

Everlaw has very broad redaction capabilities that are included; as with other Everlaw functionality, redaction is a fluid in-platform experience, available in the Review Window:

- / Redaction highlighter; draw free-form box redactions on pages;
- / Full page redactions; redact one whole page or many (using page ranges);
- / Select text and redact; select text and redact, including options to redact all instances in the document;

- / Metadata redactions; easily redact individual metadata fields in the review window;
- / Automatic metadata redaction suggestions; highlighter redactions of content that contain terms that match metadata values will be flagged as suggested redactions;
- / Native spreadsheet redactions (including the optional redaction of dependent cells); Everlaw's native spreadsheet viewer allows native redactions at cell, group of cells, column, row and sheet level, with the option to automatically redact dependent cells and carry out inverse redactions;
- / Batch redactions; Everlaw makes it easy to identify and batch redact personal data at not only document level, but also across documents in a subset, or even across all documents at project level. It is easy to identify and then redact those documents that respond to the personal data regular expressions that are built into the platform, or that respond to custom created search terms or homebrewed regular expressions that are contained in Search Term Reports through the use of Persistent Highlights. This also works for native spreadsheet redaction (including the optional redaction of dependent cells);
- / Inverse redactions; draw free-form boxes on pages and redact the whole page outside of this box;
- / Audio/video redactions on the machine transcriptions of these files that we create automatically during processing.
- / Everlaw also makes it easy to produce a metadata field indicating that a document is redacted.

Users can apply highlights and annotations (notes) to text or regions of a document. Annotation text is itself searchable, and the presence of annotations, highlights, redactions or notes can all be used as search criteria.

Where only selected passages are needed for downstream use, Everlaw can export text highlights to CSV, allowing organisations to produce extracts from documents rather than complete documents.

7. Data/ communication visualiser, analytics dashboard, user audit, integrated legal holds:

- / Data visualiser

Provides users the ability to interactively visualise key metadata and other enriched document information at database or at database subset level,

carrying out activities such as date range filtering and gap analysis. Data Visualizer helps reveal patterns and anomalies that would otherwise be difficult to see when performing a linear review.

Users can create filters directly from the charts and either include or exclude specific selections. These filters are applied consistently to both the visualisation and the results table and can be converted into IVS queries for further analysis.

/ Communication visualiser

Everlaw includes an email Communications Visualizer, which enables highly visual investigatory workflows to take place in the platform. Communication Visualizer is an interactive and filterable network graph of select communications that helps you to gather insights into communication patterns. Understand who was communicating with whom, with what frequency, and how those communication patterns evolved over time, and then filter down to relationships of interest and review the emails involved.

/ Analytics dashboards

Project Analytics dashboards are available, including project information (Project Overview and Project Size) and reviewer activity (Platform Time, Review Activity, Reviewer Accuracy, Rating Conflicts, Review Progress, Rating Trends, Reviewer Pace, and a customisable visualisation)

Review assignments can also yield metrics, including total review progress through assignment groups, individual reviewer progress through their individual assignment(s) within the group, documents in the unassigned and unreviewed pools and distribution of documents to users.

/ User Audit

Everlaw supports full audit capabilities, with document history available both at document and database level. The Everlaw Platform records user activity and retains logs reflecting additions and changes to the privileges of users. This includes Live User Activity, Historic User Activity and Administrative Activity.

/ Legal Holds

Through Everlaw's legal hold notification features, users can make legal holds simple, bolster defensibility, and proactively mitigate risk. Custodians can be added manually, or sourced from integrated directories such as Microsoft

Entra ID (formerly Azure Active Directory) or Workday, with the integrations when enabled ensuring custodian details remain up-to-date over time.

Users can issue holds to custodians to preserve potential evidence quickly, confidently, and reliably with a simple and straightforward user interface. The feature provides users with the ability to create custom hold templates, send notifications to custodians, track custodian acknowledgment of legal holds, reissue periodic reminders, as well as escalate holds to managers. All correspondence relating to legal holds within Everlaw is preserved, including the hold notice, any acknowledgement, any automated reminder or escalation and the notice of the removal or release of the hold. This information is retained even after the release of the hold. When a database that has associated legal holds is deleted, the hold information is preserved by converting the database into a Legal Holds matter accessible from the organisation-level Legal Holds interface.

Furthermore, Everlaw has the ability to issue silent holds with preservation-in-place for Microsoft Purview, and also supports the recording of external data preservations, enabling organisations to maintain a single register of preservation activity, even where the underlying data is preserved in systems outside Everlaw or Microsoft Purview. Users with appropriate permissions can create, track, and release Microsoft Purview holds on custodian data within Everlaw. These preservation-in-place objects are displayed alongside hold notices pertaining to the same matter, without ever having to leave the Everlaw platform.

Everlaw users can create, track, and release Microsoft Purview holds on custodian data within Everlaw, and view these preservation-in-place objects alongside hold notices pertaining to the same matter.

Everlaw's Legal Hold tool is fully integrated with the rest of the platform at no additional cost, helping customers to avoid legal software fragmentation.

8. Narrative building including timelines/ chronologies, document drafting and bundling features:

Storybuilder, Everlaw's integrated case narrative building toolkit, creates the opportunity for teams to collaborate seamlessly on matters by using its capabilities, such as Timelines (otherwise known as chronologies) and Drafts.

A document, specific highlights within documents, or any selected set of documents, can be promoted as an evidence item to a Timeline with their own dates, titles and descriptions; these can be attributed to a Draft (or a Deposition/interview) in Storybuilder, with redactions burned in and any other required or convenient

endorsements applied. This allows users to represent discrete passages, not just whole documents, when building a chronology or preparing submissions.

Following this promotion, using the Timeline, users can collaboratively curate the most important documents in a matter and view it in chronological context, making rapid progress from volume to relevance.

Storybuilder also supports Drafts (and Depositions/ interviews), where users can prepare written work product and examination outlines while maintaining live links back to underlying evidence. Tables can be inserted directly into Drafts (and Depositions/ interviews), or imported from external word-processing tools, supporting use cases such as issue matrices, cast-of-characters tables, and structured fact summaries.

EverlawAI Writing Assistant is fully integrated into Storybuilder Drafts (and Depositions/ interviews); using documents curated by your team in Storybuilder, EverlawAI Assistant can generate new content or analysis. Examples include evidence memos, outlines of arguments, and lists or tables of facts of events.

When citing evidence, Storybuilder supports page-level Bates auto-linking, allowing users to reference exact pages within a document. Links can be followed back into the Everlaw review environment to the precise page or passage cited.

Storybuilder also includes Fact Management, allowing teams to capture individual facts, link them to supporting evidence and witnesses, and surface those facts consistently across timelines, drafts, and other work product.

It is also possible to export a PDF bundle from Storybuilder (which is an integrated feature of the Everlaw toolbox) with a document bundle or as an exhibit bundle.

Users can then export out as a document bundle, including any text they wish, together with hyperlinked references; these references will bring users either to documents included later in that bundle, or optionally back into Everlaw (for licensed users; unlimited user licences are included at no additional cost).

9. AI/ machine learning: Generative AI/ GenAI, predictive coding, concept clustering:

/ Generative AI/ GenAI

EverlawAI Assistant, Everlaw's Generative AI (GenAI) offering, is fully integrated into Everlaw.

EverlawAI Assistant brings the power of GenAI into the world's most advanced ediscovery software to speed up legal document review and evidence-based writing.

EverlawAI Assistant combines Large Language Models (LLMs) with the data inside Everlaw's purpose-built platform. EverlawAI Assistant provides a native AI experience that is relevant to your teams and matters, all in a way that respects the privacy and security of your data.

All of the work we do is guided by our Generative AI Principles, which focus on Control, Confidence, Transparency, Privacy, and Security, and Thoughtfulness. These key principles guide us to deliver responsible generative AI to our customers.

EverlawAI features are designed to enhance the efficiency and accuracy of legal, investigatory and regulatory workflows, supporting strategic decision-making with AI-driven insights. EverlawAI credits are required to run EverlawAI tasks.

- **EverlawAI Review Assistant:**

EverlawAI Review Assistant uses generative AI within Everlaw's secure environment to support document-level analysis. Available capabilities include:

Coding Suggestions: provide suggested code values and rationales based on your organisation's coding scheme. Coding Suggestions automatically categorise documents based on codes you have prompted the system on in your coding sheet (the process of which is similar to putting together a review protocol). For each code configured for use in Coding Suggestions, Everlaw will suggest whether the code should be applied and provide a rationale for its suggestion. They can then be individually or batch applied. Coding suggestions can be used to speed up review of new documents, QC existing review work, and enable useful search/filtering options.

Custom Extractions: extract text from documents based on user-provided fields. Extractions can be created and viewed in the document viewer (along with tools for validating the extractions, like making them hit highlights).

Document Descriptions & Summaries: automatically generate concise narrative summaries of documents, which can be viewed in chunks depending on the document's length. This helps preserve sufficient information about the document's content.

Topic Analysis: automatically generate a bullet-point summary for topics based on document text, helping users navigate relevant document snippets.

Q&A Functionality: Users can ask questions about a specific document and receive answers grounded in that document's content. This feature is particularly useful for determining the relevance of certain documents to specific queries.

All of these capabilities (excepting Q&A; see Deep Dive for corpus-wide Q&A) are available both on individual documents and as batch operations from results tables, enabling use at scale across larger document sets.

- **EverlawAI Writing Assistant:**

Using documents curated by your team in Storybuilder, EverlawAI Assistant can generate new content or analysis. Examples include evidence memos, outlines of arguments, and lists or tables of facts of events.

- **EverlawAI Deep Dive:**

This cutting edge tool utilises retrieval-augmented generation (RAG), allowing legal and investigatory teams to ask questions at scale across terabytes of documents allowing them to:

- Ask questions naturally
- Get citation-backed answers in seconds
- Uncover insights supported by relevant documents
- Leverage LLM technology confidently

In Deep Dive's RAG, the data (your document contents) are ingested into chunks of data called embeddings that are stored in a vector database. This format and storage structure makes your data more searchable and retrievable for the LLM to answer questions.

- / Concept clustering and machine learning

Everlaw supports both unsupervised and supervised machine learning in the form of our clustering and our predictive coding modules, both of which are fully integrated features in your Everlaw toolbox.

- Everlaw's Predictive Coding (Continuous Active Learning / TAR 2.0 / supervised machine learning) works on a continuous active learning (CAL) basis, to improve review efficiency and accuracy. It is as easy-to-use as other platform features, with a combination of intuitive graphical interfaces and wizard driven setup processes. Predictive coding models can be "frozen" when required, preventing further updates to scores and performance metrics while review work continues. This is particularly useful during validation and quality-control exercises, or where a stable model snapshot is needed for reporting or disclosure purposes.

Multi-matter Models enable organizations on Everlaw to leverage previously trained Predictive Coding models to find relevant documents in brand-new, similar matters. Since these models are already trained, they can generate prediction scores on documents in new matters immediately. Once initial prediction scores are generated, teams can prioritise reviewing documents that the multi-matter model predicts to be relevant.

- Everlaw's Document Clustering (unsupervised machine learning) visualises documents in your dataset by conceptual similarity, generating insights about concepts in documents without requiring any user input, and helping you begin to understand your dataset without any prior knowledge of the contents of the documents.

Document clustering can be useful at the beginning of your review, for example for identifying key terms in unknown and less well-known datasets, and also as the review progresses, it can for example be deployed for quality control activities, with users able to overlay predictive coding models over document clusters in a highly visual and intuitive manner.

Through the use of these overlays, users can in effect combine unsupervised and supervised machine learning in a practical application of AI.

10. Produce documents to industry standard formats including Relativity/ RelativityOne compatibility:

Everlaw can export out formal document productions in an industry standard format (images/natives/text files/load files, as appropriate), through a simple wizard driven process; users also have the option to produce all images into one single PDF through this process as well.

As part of this production process, you are able to include both industry standard load files to allow Everlaw exported data to be uploaded to other systems, and/or document lists. Both of these options allow for customised metadata field options to be specified.

It is also possible to upload processed data into Everlaw, with accompanying metadata supplied in an industry standard load file (with an option to upload PDFs where no load file has been provided), and we are also able to import content from Relativity ARM files on your behalf. Productions can be exported from the production module that includes all desired data formats (native, image, text) and the following load files: DAT, OPT, LST, LFP, and DII.

Overview of the G-Cloud Service

Everlaw is primarily offered as an end to end, self service platform; a direct subscription with Everlaw is fully inclusive of all the customer success input, user training and customer support that organisations need to fully utilise the service.

Our team will help ensure that buyers realise both financial savings and efficiency centric benefits in relation to your investment, and provide you with the tooling and support you need to help you to comply with your applicable duties and obligations.

Everlaw's enterprise-grade technology is hosted on AWS cloud servers (the AWS UK London Region, which would be our default zone for buyers) and is fully maintained by our team. You should not need to engage your IT support team to use the platform. Our software was born in the cloud and is a true SaaS native platform, not an on-premise solution that has been repurposed for use in the cloud. Our advanced architecture negates the need for customer-side IT infrastructure burdens and helps to reduce both planned and unplanned downtime to the minimum, while also allowing for increased speed for users.

Everlaw enables teams to manage, analyse, and collaborate on information across a geographically dispersed user base, whether working in an office environment or working remotely. Everlaw combines speed, security, and ease-of-use into a unified, comprehensive solution that unlocks the collaborative power of your personnel and allows them to investigate issues more thoroughly, uncover truth more quickly, and present their findings more clearly.

The platform is future-ready and streamlines the full range of support needed for matters, including ingestion (processing), capture, organisation, search, review, analysis, and production of electronically stored information (ESI).

We are aware of the needs of the public sector, both from our US Government experience (where we are both FedRAMP and StateRAMP authorised, and work with all 50 State Attorneys General), but also from supporting UK public sector inquiries and activities

relating to those inquiries. We have set out some Case Studies at 5.1 below for further information.

In the US, we also have been committed to supporting our government customers through the future of exponential growth in data and has assigned resources and built programs (including the "Government Community" program) to create a secure space to share their unique needs, make our technology more accessible, and help build professional efficiencies to empower government teams. It is our intention to also replicate this in the UK as our portfolio of public sector customers increases.

Associated Services

API

With Everlaw's upload API, you can automate setting upload configurations, update source files, name custodians, and report on this information for existing native uploads. This also unlocks advanced functionality for API users like turning off deNISTing and directly managing part sizes in file transfers.

Everlaw's API empowers engineers or technical experts to build programs or scripts that interface with Everlaw. Everlaw's API lets your custom programs interface directly with Everlaw to automate processes like custom reporting to provide detailed analytics, billing tracking, and uploading native data. Everlaw's API allows the flexibility to support your automation of complex and unique workflows at scale.

- Everlaw's Search API gives you the ability to build out custom analytics reporting with the same flexibility as Everlaw's instant visual search.
- Everlaw's Upload API lets you build programs to automatically upload native data to Everlaw, letting you automate your data pipeline and integrate your upload process with Everlaw.
- You can use Everlaw's API to automatically pull billable size information for projects and databases, including ECA projects. This includes both final and peak sizes.
- Everlaw's API also lets you pull project administration information for your organisation like users, latest user activity, user identifiers, permission groups, and some project settings. It also lets you track the most recent activity date for a project or database.

Everlaw's Service Offerings

Buyers can expect no hidden charges from Everlaw. Please refer to our Pricing guide for further information.

All of our features and functionality are fully integrated in a secure environment, including processing, analytics and production, with no plug-ins or additional products required to gain the full benefit of the Everlaw platform.

To complement our modern technology, Everlaw offers unlimited users, projects, and its thoughtful onboarding, training and ongoing customer success support at no additional cost.

Everlaw is primarily offered as an end to end, self service platform; a direct subscription with Everlaw is fully inclusive of all the customer success input, user training, technical support and customer support that organisations need to fully utilise the service.

Everlaw's unique, user-centric approach will simplify and streamline each of our customers' matters. To help customers to fully utilise the platform, our experienced Customer Success and Support, Data Operations, and User Education teams combine industry knowledge with product expertise to provide you with Included Services and optional Professional Services.

Should you need more extensive Professional Services, we will happily connect you with our partners.

- Included Services

For our Included Services below, we will walk you through any feature via phone, email, or screen share to ensure you have all the information to complete your task. Our best-in-class support is included for every customer, for no additional cost.

These are set out in more detail later in this document in more detail, but include for example:

- Onboarding Assistance and Platform Migration. Everlaw wants to help you lay a solid foundation for a successful project, whether you're migrating an ongoing matter to Everlaw or are starting fresh with a new one.

We offer complimentary onboarding services including:

- / Data ingestion consultation before signing a contract
- / Kickoff call with our Customer Success team
- / Platform migration from another ediscovery solution
- / Initial database creation
- / Interactive live training sessions
- / Assistance in ESI protocol review

- Onboarding Training and Support. Everlaw's User Education team offers a variety of recurring free live training sessions designed to help you to learn, understand, and master the Everlaw platform. Attend a recurring, standing training session or schedule an on-demand session.
- Data ingestion from physical media sent to our office (for more details please see this Knowledge Base [article](#)).
- **Professional Services**

Should you request that we perform any of the following Professional Services on your behalf, Everlaw will evaluate the scope of your request, and if acceptable, we will require that you enter into a Statement of Work and will charge you an hourly fee after the Statement of Work is agreed on and executed between you and Everlaw.

Please note that any questions on how to use our features to complete a task fall under Included Services.

- Customer Support Billable Task
- Creation of a Search Term Report ("STR")
- Data Operations Billable Tasks
- Everlaw-managed data export from the Everlaw platform, which includes all of the following by default, unless otherwise requested:
 - / Metadata (includes CSV of work product, DAT, DII, LFP, LST, and OPT files)
 - / Images
 - / Natives
 - / Text
 - / The CSV of work product which allows one to import review work to documents on Everlaw in the future, if needed.
 - / Physical Media & Shipping where applicable.
 - / Load file creation, troubleshooting, and transformation
 - / Custom script creation
 - / Custom file renaming

- / Offline Image/PDF conversion
- / Preservation of Category & Codes for Incorrectly Loaded Data
- / Handling Non-Standard Processed Data formats

Work with Everlaw Partners

Should you need more extensive Professional Services or other one-off tasks completed, we will happily connect you with our partners. They can assist with data collections, fully managed services or review, and more involved data manipulation tasks.

Please note that this would be a procurement outside of G-cloud, and a separate procurement. Many of these partners are listed on other frameworks from which you will be able to draw down their services.

Everlaw for Good

Everlaw offers four Everlaw for Good (E4G) Programs: Everlaw for Journalists, Everlaw for Educators, Everlaw for Nonprofits and Everlaw for Pro Bono. These programs provide complimentary access to our ediscovery software to support work benefiting the greater societal good.

E4G provides access to most Everlaw platform features together with support and training free of charge up to a monthly cap, with heavily discounted rates for larger matters.

Everlaw's E4G offering is available as an associated service available for procurement outside of our G-Cloud offering.

The buyer should communicate their requirements, or their request to discuss requirements, by emailing g-cloud@everlaw.com. Depending on these requirements, we can follow up with the buyer if there is any specific information that we need beyond what has already been provided.

For more information on E4G please visit [Everlaw for Good](#).

2. Data Protection

Information Assurance

Everlaw prioritises data security and privacy with enterprise-class security protocols and privacy standards because we understand that hosting sensitive customer data on a SaaS ediscovery / edisclosure platform requires an established compliance program and rigorous controls.

Everlaw's Customer Trust program is holistic and part of our core philosophy. It demonstrates our commitment to ethics and our company values, as well as compliance with our security, privacy, and confidentiality commitments to customers, and applicable

laws and regulations. Our program is built on top of US federal guidance on effective compliance programs because we believe that security, privacy, and compliance go hand-in-hand.

Independent Assessments & Certifications

Everlaw's system of internal control requires annual independent third-party audits to test the operational effectiveness of our program and practices.

Everlaw's annual audits include ISO/IEC 27001:2022, ISO/IEC 27017:2015, ISO/IEC 27018:2019, Cyber Essentials, Cyber Essentials Plus, SOC 2 Type 2 (Security, Privacy, Confidentiality & Availability), SOC 3, and (in the US) FedRAMP and StateRAMP.

Downloads:

Everlaw Security Documentation (ISO/IEC 27001:2002, ISO/IEC 27017:2015, ISO/IEC 27018:2019, SOC 2 Type 2, SOC 3, and others) are available for download [here](#).

Cyber Essentials (CE) & Cyber Essentials Plus (CE+)

You can view our certification details [by searching for Everlaw here](#)

Alternatively, buyers can request a copy of Everlaw's current certification documentation by emailing g-cloud@everlaw.com.

Compliance Program Framework

The Everlaw Compliance Program Framework has seven elements and Everlaw's dedicated GRC team is accountable for the design, execution, and operation of the company's security, privacy and compliance program based on this framework.

Everlaw's Compliance Program Framework is strategically structured around seven core elements, guided by established federal guidelines and industry best practices to ensure comprehensive integration of security, privacy, and compliance across all aspects of our operations. We also integrate the thirty-two Security & Privacy-by Design Principles from the Secure Controls Framework. These principles ensure that security and privacy are foundational to our system design and operational processes.

To drive and manage these initiatives, Everlaw has established a dedicated Security Management Team (SMT). This team is not only responsible for the strategic design and implementation of our security, privacy, and compliance efforts but also oversees the ongoing management of these critical areas. Their work ensures that Everlaw consistently aligns with evolving legal requirements and industry best practices, safeguarding our customers' data and maintaining trust.

Enterprise Risk Management

Everlaw has implemented the Three Lines of Defense governance model to enhance its internal control systems. This model promotes effective and transparent management of compliance obligations and risk by defining clear accountabilities throughout the

organisation. Our risk assessment and management strategy is vital for governance in all departments. It follows the guidelines from the NIST Risk Management Guide for Information Technology Systems, NIST SP 800-30. The Security Management Team team is responsible for organising regular risk assessment meetings with the Risk Management Committee, ensuring the Risk Register is meticulously maintained and updated, and continuously monitoring the effectiveness of risk response strategies and their implementation.

Policies & Procedures

Everlaw documents, disseminates, and updates internal policies and procedures that effectively reinforce ethical norms and compliance, fostering a culture deeply rooted in integrity. They also serve to address the compliance, security, and privacy risks identified by the company via the risk assessment process described above. Everlaw's Policies and Procedures address information security, business policies and practices, and federal-specific and government-specific compliance requirements.

Third-Party Risk Management

Everlaw implements a stringent third-party risk management program. This program initiates a thorough security and privacy assessment for each potential third party to ensure their practices align with our rigorous security requirements.

As part of Everlaw's comprehensive evaluation process, prior to any contractual engagement, our evaluation process involves not only the Security Engineering Team team but also encompasses the Governance Risk and Compliance (GRC) team, the Operations Team and the Finance team. This cross-departmental approach ensures that all potential vendors and suppliers meet Everlaw's high standards in security, operational integrity, and financial stability.

Once onboarded, third-party relationships are continually monitored through ongoing oversight and collaboration. Our teams perform regular reviews and audits on critical vendors to ensure ongoing compliance with Everlaw's privacy and security standards. This helps manage and mitigate risks associated with external collaborations, safeguarding our operations and data across all touchpoints.

Incident Reporting & Response

Everlaw's incident response framework is designed to detect, respond to, and recover from cybersecurity incidents promptly. Everlaw adheres to the NIST SP 800-61 guidelines for incident management, establishing clear escalation paths and defined steps for breach notification. Our incident reporting and response procedures are supported by a suite of advanced security technologies that ensure comprehensive threat monitoring and management. These procedures are designed to handle a variety of scenarios, including insider threats and software vulnerabilities, and are rigorously tested annually to confirm their effectiveness. Our team participates in ongoing training and industry initiatives to stay

at the forefront of cybersecurity practices, ensuring a proactive stance in incident management. All incidents are logged in a secure tracking system, which is audited annually to maintain our high standards of security and accountability. By preparing for, rapidly addressing, and thoroughly recovering from any security incident, we safeguard our operations, protect our customers' data, and preserve the integrity of our services.

Personnel Security

All employees and select suppliers undergo comprehensive background checks prior to the first day of working at Everlaw, including criminal history and employment verification in accordance with local laws. Everlaw also verifies work eligibility for all employees by collecting I-9 documents and running E-Verify checks. Additionally, all Everlaw employees, upon joining the company and/or during their employment period, as well as certain service providers, are required to sign non-disclosure and confidentiality agreements. Everlaw requires employees to affirm their acknowledgment and agreement to follow Everlaw's Code of Conduct, Employee Handbook, and all Policies and Procedures on an annual basis.

Corporate IT Security

Everlaw requires full-disk hard drive encryption for all computers and controls employee access to customer and personal data using role-based access, multi-factor authentication, and account management procedures. Our standards require a 256-bit AES algorithm for full-disk encryption, installation of antivirus software, and strong passwords. Everlaw's information security policy establishes requirements for password complexity, changes, protection, reuse, and follows NIST best practices.

To safeguard mobile access, Everlaw strictly controls device permissions through a comprehensive bring-your-own-device (BYOD) policy, ensuring all devices meet our security standards before accessing our network. This policy includes protocols for securely erasing Everlaw data in the event of device loss or theft. Consistent application of multi-factor authentication further secures access across mobile platforms.

Our Security Management Team diligently monitors compliance, ensuring all employees adhere to our clean desk and BYOD policies while maintaining ironclad device security configurations in collaboration with the Everlaw IT team.

Training & Awareness

All Everlaw employees complete security, compliance, and data privacy training upon hire and annually thereafter. Additionally, all employees, regardless of their tenure, participate in annual live security and privacy training. Specific role-based training is required upon hire and on an annual basis. The Security and Compliance team conducts security and privacy awareness campaigns and provides updates via email, posters, presentations, and supplemental materials.

In addition to security and privacy, our program includes training for all employees on important regulatory and compliance issues such as AML, Antitrust/Competition Law, and Gifts & Entertainment.

Access Controls

Everlaw employs a sophisticated role-based security model to govern access within our production network, ensuring that sensitive data and system operations are shielded from unauthorised access.

Access to our production environments is rigorously controlled through the principle of least privilege. This means each team member is granted the minimum level of access necessary to perform their job functions effectively.

Multi-factor authentication (MFA) is mandatory for accessing the AWS console and the administrative areas of the Everlaw Platform, providing an added layer of security that helps thwart unauthorised access attempts.

Access to our platforms, including critical production environments, is strictly role-based. This ensures that every access request aligns with the user's defined job responsibilities. All access requests undergo a rigorous review process, initially by the user's manager and subsequently by other relevant parties, such as our Legal team, when necessary. This multi-tiered review guarantees that access is appropriate and justified.

The ability to create or modify user access accounts and privileges in the production environment is restricted to a limited number of qualified system administrators. This control is crucial in maintaining the integrity and security of our systems.

Every request for access is logged, and comprehensive audit trails are maintained. This not only helps in tracking and managing access but also supports our compliance initiatives. We also conduct quarterly access reviews for all privileged users to ensure ongoing compliance and address any potential security gaps promptly.

Physical Security

Access to our facilities is limited to specifically authorised personnel whose job functions necessitate it. Our visitor management process is designed to balance security with accessibility. All visitors are required to sign in upon arrival and must be accompanied by an Everlaw employee throughout their visit to ensure we maintain a secure environment while facilitating necessary external interactions. Once access to our facility is no longer required, due to changes in employment status or job function, we promptly revoke access.

Data Centre Security

Everlaw is hosted in secure AWS cloud servers. We operate in several jurisdictions using AWS cloud hosting infrastructure, for example: UK (London Region) (which would be our default zone for buyers), and also EU (Frankfurt Region), US (US East and West Regions), Canada (Central Region) and Australia (Asia Pacific, Sydney Region).

Each AWS Region consists of multiple independent and physically separate Availability Zones within a geographic area. All Regions currently have three or more Availability Zones. Regions themselves are isolated and independent from other Regions.

Separately from Everlaw's own certifications, AWS has achieved SOC 1, SOC 2, and SOC 3 certifications, along with ISO 27001 and FIPS validations. These certifications testify to AWS's commitment to maintaining high security and privacy standards, aligning with numerous legal and security frameworks globally.

Secure Architecture

Everlaw's cloud infrastructure utilises Amazon Web Services (AWS) to host our application, all customer data (or Case Materials), and backups with optimal security. This setup ensures the safeguarding of sensitive information and system operations.

Network Isolation with Amazon Virtual Private Cloud (VPC); Everlaw enforces a secure environment within our AWS-hosted framework. By deploying Amazon VPCs, Everlaw's services operate within separate, secure virtual networks. These networks are isolated from other external traffic, with connectivity managed precisely through advanced firewall configurations.

Management Subnet; Each VPC contains a management subnet that provides the Everlaw environment with security and management functionality. This includes logging and monitoring, vulnerability scanning, and other management tools. Access to this environment is strictly restricted to Everlaw personnel only, using encrypted channels and MFA.

Secure Cloud Practices; We ensure endpoint protection in hosting environments, including antivirus systems that are regularly updated following critical security patches or releases, consistent with Everlaw's server change control policies.

Synchronizing Network Time; At Everlaw, we prioritise the security and integrity of our service operations, which includes maintaining confidentiality over specific operational details such as the settings of our Network Time Protocol (NTP) and associated clock configurations. To uphold the highest levels of security, information about how our internal clocks are synchronised with the cloud service clocks is not disclosed externally. While specific details on Everlaw's NTP settings remain confidential to safeguard our systems, we ensure that all customer interactions with our platform are seamlessly aligned with our synchronised network time. This practice is critical for maintaining consistency in transaction timestamps, data logs, and other time-sensitive operations that customers perform on our platform. This approach not only helps in protecting our infrastructure from potential security threats that could exploit detailed configuration data but also ensures that every customer interaction remains consistent and reliable.

Data Security Enhancements; Everlaw employs private subnets that use private IP addresses to handle internal operations securely, while managing all public internet traffic through carefully configured AWS security groups. This strategic control helps maintain the integrity and confidentiality of data interactions.

Encrypted Communications; All communications between Everlaw customers and our platform, as well as exchanges with third-party applications, are protected via HTTPS using Transport Layer Security (TLS). This encryption ensures that all data transmitted remains secure and private.

Encryption-at-Rest; To protect data at rest, Everlaw uses AWS's default encryption service, which employs the advanced AES-256 encryption standard. This feature automatically encrypts all data stored on disk, including at the database level, enhancing the security measures against potential data breaches.

Application Security

Everlaw is committed to safeguarding customer data through effective security practices embedded throughout our development lifecycle. Our Secure Development Lifecycle (SDLC) emphasises the importance of security from the ground up, integrating key practices to minimise vulnerabilities and enhance software reliability.

Focused Developer Training and Review Processes; An essential element of our SDLC is the ongoing professional development of our development team. To equip them for the evolving landscape of cybersecurity threats, we provide continuous training focused on emerging challenges, with a particular emphasis on the vulnerabilities outlined in the OWASP Top 10 security risks.

To integrate security seamlessly into our development process, we conduct thorough design and code reviews, employing advanced tools such as Dynamic Application Security Testing (DAST), Software Composition Analysis (SCA), and Static Application Security Testing (SAST). These methodologies are critical in ensuring that every phase of software development adheres to the highest standards of data protection and maintains the structural integrity of our systems.

Error Management and Data Handling Techniques; Our development process incorporates error handling, comprehensive logging, and a file integrity manager (FIM) to track and mitigate potential issues swiftly. Input validation and strong encryption protocols are systematically employed to secure data at all points of interaction, thereby preventing common vulnerabilities such as improper data handling and leakage.

Use of Secure Open-Source Frameworks; Everlaw utilises advanced, secure open-source frameworks that come equipped with built-in security controls. These frameworks are carefully selected to mitigate risks associated with the OWASP Top 10 security threats, such as SQL Injection (SQLi), Cross-Site Scripting (XSS), and Cross-Site Request Forgery (CSRF). By

leveraging these modern tools, we limit our exposure to these prevalent risks and enhance the overall security posture of our applications.

Continuous Security Training and Penetration Testing; Our engineers undergo annual secure code training, focusing on the most current security risks, common threat agents, and effective security controls. This training ensures that our team is proficient in identifying and addressing potential security issues during development. Moreover, Everlaw engages third-party security experts to conduct thorough penetration tests on our web applications at least once a year. These tests are essential for identifying vulnerabilities that might not be detected during internal reviews, allowing us to rectify them proactively.

Security And Reliability Monitoring

Everlaw has an on-call team to respond to specific alerts. Through vulnerability scanning, the use of intrusion detection and intrusion prevention systems, and by subscribing to industry and government alerts (e.g., US-CERT), we keep a continuous watch on the security of our customers' data. Everlaw's monitoring program uses a combination of open-source and commercial tools such as Host Intrusion Detection Software (HIDS). We also leverage security logs generated by AWS firewalls to monitor suspicious activity. Everlaw security and site reliability engineers actively monitor alerts on our system configuration and any anomalies.

Security Monitoring And Rapid Response

Our team of security and site reliability engineers play a crucial role in actively monitoring our system configurations and any deviations from expected activity. This continuous scrutiny helps us ensure that Everlaw's infrastructure remains secure and that our customers' data is protected against both current and future cyber threats. Our dedicated on-call team is equipped to handle specific alerts, ensuring immediate action is taken when necessary. To maintain a vigilant watch over our systems, we employ a robust suite of security measures:

Vulnerability Scanning; We systematically scan our systems to identify and address vulnerabilities before they can be exploited.

Intrusion Detection and Prevention Systems (IDPS); These critical tools help detect and prevent unauthorised access, providing an additional layer of security.

Real-Time Alerts; By subscribing to authoritative sources like US CERT, we stay updated with the latest security advisories and threat intelligence, enabling us to react swiftly to emerging threats.

Everlaw's monitoring strategy incorporates both open-source and commercial tools, including Host Intrusion Detection Software (HIDS), to comprehensively assess our network integrity. Additionally, we leverage the detailed security logs generated by AWS firewalls, which allow us to monitor and investigate any suspicious activities effectively.

Product Security Features

Everlaw is dedicated to providing robust security features within our platform to enhance user experience and data protection. Key security functionalities include:

Single Sign-On (SSO); Everlaw supports Single Sign-On (SSO) through the SAML 2.0 protocol, allowing users to access our platform using their organisation's existing LDAP or other SSO systems. This integration simplifies the login process and enhances security by reducing the number of passwords users need to manage.

Multi-Factor Authentication (MFA); To further secure customer accounts, Everlaw offers Multi-Factor Authentication (MFA) at no additional cost. This security measure can be enforced across the organisation, requiring users to provide a second form of verification—such as a code sent to their email or mobile device—when logging in, thereby significantly enhancing account security.

Granular Permissions; Everlaw enables precise control over access rights within the platform, which is critical for maintaining the security and efficiency of data reviews. Administrators can set detailed permissions, allowing users access only to the tools, data, and work products necessary for their specific roles and responsibilities.

User Analytics & Monitoring; Our comprehensive analytics tools provide administrators with insights into both live and historical user activity within their projects. Everlaw's User Activity logs all user activity including login, logoff and unsuccessful login attempts, enabling proactive oversight and security management.

Secure In-Platform Sharing; Everlaw's in-platform messaging system allows for secure, direct communication and document sharing among users. This feature eliminates the need for downloading and sharing sensitive documents through less secure channels like email, enhancing both usability and security.

Flexible Sharing Options; Everlaw also facilitates secure collaboration with third-party experts or co-counsel by allowing users to create, organise, and share specific document subsets within a secure project environment. This capability ensures that external parties have access only to the necessary documents, reducing the risk of broader data exposure.

Location Approval Lists (IP Range Blocking); Recognizing the security challenges of remote work, Everlaw allows project administrators to restrict access based on IP addresses and geographical location. This feature is particularly useful for organisations looking to tighten security protocols and ensure that only authorised users can access project data from approved locations.

Data Back-Up and Restoration

Everlaw backs up customer data every three hours and stores the data in private S3 buckets for storage. Everlaw platform users with delete permissions in database settings can delete

documents from the database. Once case materials have been marked for deletion, we store the data in our back-up environment for 120 days. Per our terms of service, we keep certain administrative data that is anonymized to help improve our service. Under no circumstances will we keep case materials or other attachments.

To optimise data storage and security, Everlaw leverages AWS storage classes, designed to store data across multiple Availability Zones within the designated AWS Geographic Region. These Availability Zones are strategically set up to be physically separate and isolated, yet interconnected with low latency, high throughput, and highly redundant networking. This infrastructure setup ensures that customer data is securely stored and remains accessible without the risk of significant downtime or data loss.

Business Continuity Statement/ Plan

Everlaw has a business continuity and disaster recovery plan that incorporates input from periodic risk assessments, vulnerability scanning and threat analysis, as well as third-party and vendor risk profiles. The business continuity and disaster recovery plans and incident response procedures are tested at least annually and inform the ongoing risk assessment and management process. A more detailed plan can be provided to the buyer on request.

Privacy by Design

In alignment with our SDLC, Everlaw integrates data protection and privacy from the initial design phase of each feature and product. By embedding organisational and technical safeguards early, we ensure that personal data is processed only for its intended purpose. Our adherence to detailed information security policies and procedures guarantees the security, availability, processing integrity, and confidentiality of customer data at every step.

Through these uncompromising encryption practices and proactive design strategies, Everlaw remains committed to the highest level of data security, ensuring that our customers' information is protected against evolving cyber threats.

Our dedication to maintaining the highest standards of data protection and privacy is integral to every facet of our operations. Anchored by our expert Privacy team, we focus relentlessly on securing the integrity and confidentiality of the data entrusted to us.

Proactive Data Management; Tasked with overseeing our comprehensive data inventories and impact assessments, our Privacy team plays a crucial role in our security infrastructure. These ongoing activities are essential for promptly identifying and mitigating any risks to data handling. Regular updates to our data inventories ensure that we have current and accurate records of data flows and storage specifics, allowing us to quickly address any potential gaps in our data protections.

Dynamic Risk Assessments; Our commitment to dynamic improvement involves continuous risk assessments that scrutinise the effectiveness of our data protection measures. By regularly adapting our strategies, we keep pace with evolving legal and regulatory demands,

ensuring that our data handling procedures safeguard customer information against emerging threats.

Certifications and Compliance; Everlaw holds a SOC 2 Type 2 certification, a testament to our rigorous privacy standards. This certification not only underscores our dedication to robust data protection practices but also reinforces the trust our customers place in us.

Transparency in Data Policies; Our Privacy Policy is crafted for transparency, outlining in clear terms how Everlaw collects, uses, stores, and discloses personal information. This policy ensures that our customers and users are well-informed of our data management practices and their rights regarding personal data, fostering an environment of trust and openness.

Everlaw has implemented the appropriate safeguards to protect its customer's data against any accidental or unlawful destruction, loss, alteration, unauthorised disclosure of, or access. Team data inventories and data protection impact assessments are updated and reviewed by the Everlaw Privacy team regularly. Everlaw has a SOC 2 Type 2 certification relevant to the Privacy criteria. In addition, Everlaw has engaged independent auditors to review its compliance status for both HIPAA and GDPR. The Everlaw Privacy Policy explains how information is collected, used, stored, and disclosed by Everlaw. More information is available at <https://everlaw.com/privacy>.

All customer data, both in transit and at rest, is encrypted. Everlaw employs hybrid encryption methods to protect data consistently across all interfaces and storage systems, to align with the standards specified in NIST Special Publication 800-53.

Encryption in Transit; Everlaw secures application data transmissions using HTTPS, ensuring that all customer data is encrypted while in transit. We utilise Transport Layer Security (TLS) version 1.2 or higher to safeguard HTTPS communications comprehensively. Additionally, our email systems employ opportunistic TLS encryption to secure email exchanges, enhancing the privacy and integrity of communications.

Encryption at Rest; For data at rest, Everlaw leverages AWS's AES-256 encryption to secure data stored on disks. We extend this protection to snapshots and backups, ensuring that all stored data is encrypted with AES-256, thus securing inactive data on any device or network from unauthorised access.

Generative AI

All the work we do is guided by our generative AI principles, which focus on control, confidence, and transparency. These key principles guide us to deliver responsible generative AI to our customers. We believe this new generation of AI will be transformative over the long term, rather than a flash in the pan. Thus, we are more interested in being the best at generative AI than being the first. So while we have multiple teams working on our generative AI features, they are working under the guidance of these principles and

collaborating with our customers to ensure we are delivering features consistent with our long-term philosophy of acting with integrity and discipline: doing the right thing and doing it the right way.

Transparency, Privacy, and Security; Consistent with our strong security culture, if we use any third-party AI tool, our Legal and Security teams will evaluate the specific system's operational approach, the data that will be processed, and the safeguards that are in place to protect the data and then review the governing legal terms to align with our commitments to our customers. We will only select third-party AI tools with capabilities to disallow them or others from training models on our customers' data. We will notify our customers about the third-party tools we are using. We'll also ensure that our security obligations, are met before offering any such tool to customers that rely on those obligations.

Control; Customers will be able to opt in or out of using our generative AI tools. If they choose to use these tools, any interactions with generative AI should be clearly indicated to the user.

Confidence; Generative AIs can provide immense value, but they can also make mistakes. We want to ensure that users can develop confidence in their results. To that end, where possible, we will take the following actions:

- Tailor generative AI features to specific use cases that we believe perform reliably.
- Require the AI to cite specific, immediately verifiable passages of text from users' evidence as justification for its responses.

If that is not possible, ensure that users have clear access to any evidence provided as context to the AI, so that they may perform a more comprehensive validation if they so choose.

How does EverlawAI Assistant work? EverlawAI Assistant combines LLMs developed by OpenAI with the data inside Everlaw's purpose-built platform. EverlawAI Assistant provides a native AI experience that is relevant to your teams and your litigation and investigation use cases, all in a way that respects the privacy of your data.

Privacy First: How Everlaw Protects Your Confidential Data; To the extent any case materials you submit to EverlawAI Assistant are subject to any applicable privacy law, the terms of the Data Processing Addendum, or the data processing addendum that is applicable to your account apply. In addition, your data is subject to the same confidentiality requirements as stated in your agreement with Everlaw.

Best Practices for Using the EverlawAI Assistant; Large language models (LLMs) are systems trained on a huge corpora of text. Based on this training, these models are adept at

predicting the next word given a sequence of preceding words. This is the core capability of LLMs.

- While some compelling functionality can be built from this core capability, it is important to remember that LLMs are probabilistic language machines with no notion of things like truthfulness, accuracy, or intent. LLMs are trained to produce fluid text, not accurate responses.
- When using any feature backed by an LLM, it is important to remember that these systems can and do produce inaccurate, false, and/or misleading statements, even when additional guardrails have been put in place. When using EverlawAI Assistant features, we encourage you to exercise your own judgment and expertise to validate responses. Human validation is particularly important when you are using the system to create factual claims about people or events, or work product you intend to share with others. We require EverlawAI Assistant to cite specific, immediately verifiable passages of text from users' evidence to make human review and validation intuitive. For more information, check out our Knowledge Base.

Data Security with EverlawAI Assistant: Staying Within Everlaw; When you use EverlawAI Assistant, each data request is sent to our AI service provider individually, over an SSL-encrypted service, to process and send back to Everlaw. The data you submit and the responses you receive via EverlawAI Assistant are not used to fine-tune or improve our AI service provider's models or service or shared between customers. Our AI service provider does not store the data you submit or the responses you receive.

- We will process and transmit data for EverlawAI Assistant in accordance with our Data Processing Addendum and your individual agreement with Everlaw.
- Everlaw believes that with the right implementation, the benefits of this technology for legal professionals will be significant. Everlaw aims to be the legal industry's most trusted AI platform, and we'll work every day to earn that trust.

3. Using the service

Ordering and Invoicing

The buyer should communicate their requirements, or their request to discuss requirements, by emailing g-cloud@everlaw.com. Depending on these requirements, we can follow up with the buyer if there is any specific information that we need beyond what has already been provided.

At the buyer's request, Everlaw will, if necessary, provide assistance in completing a Statement of Work (an order form) in order to complete the call-off contract requirements.

Availability of Trial Service

Everlaw offers a paid Trial Service for ad-hoc, pay as you go use of our service, as set out in our Pricing Document.

Subject to the further detail set out in our Pricing Document, the features, benefits and other service conditions of this Trial Service are identical to those of our subscription options. Buyers are not limited to the number of paid Trial Service call offs that they make, however the pricing we offer around our subscription options is at a commensurately lower cost as set out in our Pricing Document.

On-Boarding, Off-Boarding, Service Migration, Scope etc.

Onboarding

Everlaw wants to help the buyer lay a solid foundation for a successful project, whether they are migrating an ongoing matter to Everlaw or are starting fresh with a new one.

We offer fully inclusive onboarding services for each new case including:

- Data ingestion consultation
- Kickoff call with our Customer Success team
- Platform migration from another ediscovery solution
- Initial database creation
- Interactive live training sessions
- Assistance in ESI protocol review

The Everlaw Customer Success team will engage with the buyer's users to understand their current case needs and map them to available functionality. The Everlaw Customer Success team will coordinate customised, objective-based training paths to help users to be Everlaw proficient as quickly as possible. As a supplement to live training, Everlaw also hosts a number of virtual standing training sessions every weekday that are free and available to anyone who would like to hop on for an introduction or refresher. At the completion of the onboarding process, users should feel very comfortable navigating Everlaw and executing their required tasks.

Offboarding

Just as Everlaw has a straightforward onboarding process, and a strong track record of migrating hundreds of clients onto the platform from large enterprise, on-premises eDiscovery systems, Everlaw believes in making any transition away from the service just as easy and efficient, should the time or need arise (for example, at the end of a contract or at matter closure).

Upon notice of termination in line with the contract, the Everlaw Customer Success Manager will engage with the buyer to agree a clear exit plan, including scope, timeline, and

responsibilities. This typically covers the schedule for final exports, any validation the buyer wishes to perform, the date on which access should be removed, and the timing for final data deletion.

Project administrators with appropriate permissions can export their own data from Everlaw on a self-service basis at no additional cost. Data export is a simple, wizard-driven workflow that can be completed in only a few clicks, and can include all project data: native documents, extracted text, images (including redacted and unredacted PDFs and/or TIFFs), metadata in industry-standard load files or CSV, and comprehensive audit history in CSV format for chain-of-custody and reporting purposes. These formats are designed to be platform-agnostic so that data can be easily imported into another eDiscovery solution or archival environment.

Once the buyer confirms that migration or export activities are complete, Everlaw will, on request, return or delete all customer data associated with the service. Admins can also delete projects themselves. When a project is deleted, all associated data is permanently removed from Everlaw in line with our documented retention and destruction processes. Alternatively, if the buyer expects that a matter may need to be re-activated in the near term, projects can be suspended instead of deleted, with commercial terms adjusted in accordance with the applicable pricing documentation.

Where buyers require a more bespoke exit plan or enhanced services, these can be provided as optional Professional Services for an additional cost, agreed in advance (for example, via a purchase order or change control process). Examples include:

- Everlaw-managed data exports performed by Everlaw on the buyer's behalf (rather than self-service), including packaging of exports and delivery on encrypted physical media where required;
- Specialised Data Operations billable tasks, such as complex mapping and transformation of legacy data beyond standard export/import, or large-scale, multi-phase portfolio migrations; and
- Other custom professional services such as creation of bespoke search term reports, advanced configuration, or coordinated work with third-party partners, as appropriate.

In circumstances where the buyer chooses to terminate the contract early and requires Everlaw to transfer data on their behalf, Everlaw can perform this work under our Professional Services pricing as set out in our Pricing document; however, even in these cases, Everlaw's intent is not to derive significant revenue from services, and any such activities would be clearly scoped and pre-approved with the buyer in advance.

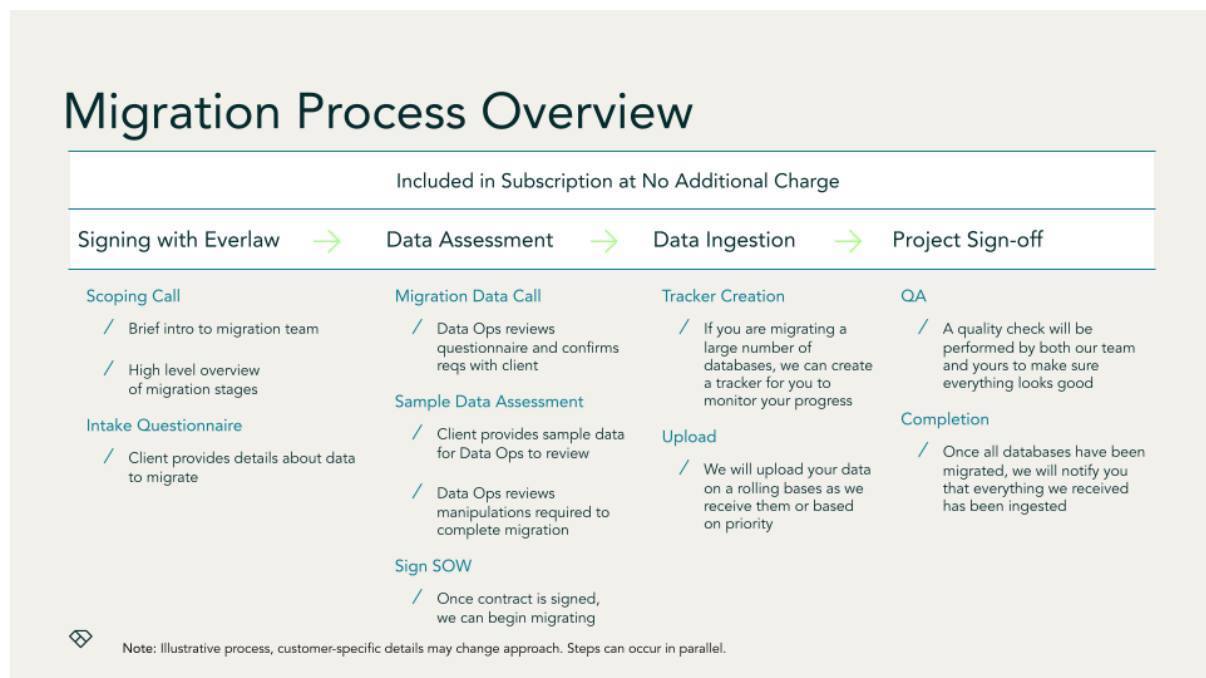
Service Migration

Everlaw's core model is to include standard onboarding, ongoing support, in-bound data migration, and routine end-of-contract exports within the subscription, without separate service fees.

For example, Everlaw's Data Operations team regularly manages migrations from legacy platforms (for example your previous provider's platform) at no additional cost, and similarly supports data exports and industry-standard load file creation to enable migration away from Everlaw at contract end at no extra charge.

Everlaw typically does not charge for decommissioning and off-boarding activities themselves.

Typical migration process overview (data inbound to the Everlaw platform):



Training

If you are contracting directly with Everlaw, we provide support and training at no additional cost.

Our Training and Support teams

Everlaw support teams are currently based in both the UK and US, with live support available Monday to Friday on a 24H basis, and on a 16H basis Saturday and Sunday (2pm - 6am GMT). In the unlikely event of a critical error, 24 hour support is available.

Our Customer Experience team is split into Customer Success, Customer Support, Data Operations and User Education.

Customer Success

We have intentionally chosen to build a Customer Success function and not a Project Management function for our customers' benefit. This is a different approach than the rest of the market, and Customer Success Managers are integral to our approach.

Our Customer Success Managers are aligned with your organisation as a whole. They focus on change management, and also on enabling your key stakeholders to get what they need out of the technology.

They conduct, for example, quarterly business reviews, provide training, troubleshoot questions and suggest workflows. The Customer Success Manager's responsibility is to ensure that you know how to use Everlaw and to ensure you make the most of your investment.

We recognise that you work with external consultants, outside experts, and other resources to support your organisation. Our approach is to enable you to determine the utilisation rate of your internal resources, which allows you to selectively outsource support services when needed (to Everlaw partners or to your existing providers), giving you maximum flexibility.

Everlaw's Customer Success Team can also assist with the training and support of these third parties for no additional cost.

After initial onboarding, Everlaw's Customer Success Team, led by the dedicated Customer Success Manager, Everlaw will continue to provide support to users throughout the life of the contract on the telephone, online and/or onsite, at no additional cost.

Customer Support and Data Operations

The Customer Support and Data Operations teams have strong domain and technical expertise, who take a consultative approach to maximise your return on investment. The teams will be available to help walk users through any area of the platform and answer any technical questions related to Everlaw's various features. Users will always be able to quickly connect with the team via email, in-platform messaging or telephone.

User Education

Everlaw has a robust and modern training program ready to empower users in a manner appropriate to their role requirements. We deliver our training across several channels to make our training accessible to busy users, some of whom may only need limited or short term access for an ad-hoc activity, while others may spend most of their day on the platform.

Training Centre

Everlaw's Training Centre is the one stop shop for recorded training to support the office or team training requirements and to make onboarding of new users (both customer and outside parties) simple. Available online at any time, users can simply visit the website and

follow a training path that makes sense for them. Additional training resources and the latest feature release specific videos are also available through the Training Center, to ensure users are kept constantly up-to-date with the latest features and remain “Future Ready.”

Live and Virtual Live Training

Everlaw offers unlimited custom training through Everlaw’s User Education team. Any user can attend online, standing training sessions with a live instructor, which are objective based and include live Q&A with Everlaw; they can alternatively request a virtual training session customised to their needs. The Everlaw team can also work with users to schedule in-person training on a case-by-case situation in the UK, to ensure users, including reviewers and system administrators, have product expertise commensurate with their role, and are certified as needed to be successful in their roles as quickly as required.

Each week, Everlaw’s User Education team also offers a variety of live standing training sessions designed to help any Everlaw user learn, understand, and master the Everlaw platform. These sessions cover everything from introductory sessions designed to help new users get started navigating and using Everlaw, to advanced sessions focused on specific complex features.

On-platform Walkthroughs and Knowledge base

Across the platform, Everlaw users have access to instant on-platform support. All users need to do is click the question mark at the top of any page they are on in the Everlaw platform and a new window opens that gives them relevant articles and video tutorials to the area of the platform they are in, as well as the ability to send a message directly to our customer support team to provide answers to specific questions. Throughout this process, Everlaw’s dedicated team will be available to assist.

For detailed insights into product features and functionality, users and admins can access Everlaw’s online Knowledge Base at any time. Everlaw offers a constantly updated library of articles and walkthrough videos that support our customers ongoing product understanding. This library is available to all users (and non-users) and accessible online.

Training Certifications

Users that complete our Everlaw Certified Pro modules and pass the module exams will receive the designation of “Certified Professional” in Everlaw and provided certifications. Organisations procuring Everlaw through the G-Cloud 15 framework will have the ability to have unlimited users go through the certification program at no additional cost, which may be a good option for organisations interested in a “train-the-trainer” approach, and team member(s) who will be responsible for data management and system ownership.

Implementation Plan

Deploying and implementing a true cloud-native, Software-as-a-Service (SaaS) solution like Everlaw takes far fewer resources and less effort from the customer than traditional on-premises deployments.

Unlike on-premises applications that would require a heavy server footprint, various software licences, necessary integrations, and a small army of IT staff that have been vetted to access the government physical environment, with SaaS solutions all of that effort happens “as a Service” and is simply not required.

A project implementation plan outlining items including the steps, resources and time frame with agreement of go-live date and milestones can be tailored depending on the customer’s needs during the kickoff call, or after this kickoff call.

The onboarding process starts with a Kick-off (KO) meeting with the Everlaw account team, which includes the ongoing relationship team at Everlaw (Customer Success), the Account Executive, plus other relevant resources to support the process (where required), for example Data Operations personnel to assist with complex data discussions.

The KO meeting will walk through introductions to the Everlaw team and vice versa, a review and validation of the project scope and objectives (deadlines, customer team size, data expectations, document review and productions), agreement on a schedule of tasks such as training plans and certification, as well as supportive resources to enable the most efficient usage of Everlaw.

The Everlaw team aim to conclude the KO meeting with an agreed onboarding plan bespoke to the customer, key milestones mapped out including meeting cadence, a recap of the fee structure, a training schedule, and to give the customer a clear understanding of who, how and when to contact the Customer Support team with questions. The training plan is critical to unlocking the product potential and will often follow the project lifecycle to enable the most efficient use of the users time, for example running trainings on managing the platform, uploading data, creating users and document review at the start of a case, followed by production training nearer a scheduled production. The training plan can be tailored to the customers needs and Everlaw offers a customer certification program to enable a greater depth in self-service support. All trainings offered, including certification, are included in the contract and the plan is unique to the customer's own requirements.

Once the customer is onboarded, a series of business reviews and check-in meetings are scheduled to ensure the customer remains on track to meet their milestones, and have the right balance of training and support.

We believe our unique approach to building intuitive software and pairing it with robust, personalised, inclusive onboarding, training, and educational services will increase user adoption of Everlaw, and will create a stronger partnership to continuously improve our

product and the services we provide to empower our customers to do more with less and maximise your return on investment. From data migrations to custom training sessions, the Everlaw team of product experts, skilled data operations managers, and seasoned ediscovery support staff are there for the teams every step of the way.

Sample implementation plan:

Included in Subscription at No Additional Charge							
Phase 1	Phase 2	Phase 3	Phase 4	Phase 5	Phase 6	Phase 7	Phase 8
Persona understanding to inform training plan	Workflow Translation & Creation (OC)	Matter categorization exercise	Technical considerations	Prime Customer team & OC for the future	Low change mgmt matters to Everlaw	Med change mgmt matters to Everlaw	High change mgmt matters to Everlaw
Customer to provide grouping of Everlaw users: 1. Internal attorneys / legal assistants / paralegals / analysts 2. Partners 3. IT team 4. Experts 5. Outside Counsel / How many firms? / Divided across matter type? / Region? / Cost?	1. Understand primary use cases flowing to legacy platform 2. Understand success in Customer's terms 3. Conversations with each key group to understand workflows, priorities, and timelines 4. Translate workflows into Everlaw terms / processes 5. How and what you expect outside counsel to be doing w/ Everlaw	Group matters into change management buckets: 1. Low change management matters 2. Med change management matters 3. High change management matters	1. SSO implementation 2. Delegated upload authority 3. Credentialing 4. Organization wide settings 5. Templating for matter type 6. Conversation around API uses	/ Why is Customer transitioning? / What to expect w/it training plans by role responsibility / What to expect with new matters and current matters / Sharing your goal with your team: Minimize manual work and accelerate workflows / Share with OC that they'll be using your selected platform	/ Net new matters / Bucket 1 no migrations (low complexity)	/ Net new matters / Bucket 2 migrations (moderate complexity)	/ Net new matters / Bucket 3 migrations (higher complexity)
Training plan development	Develop launch message for Customer's team and outside counsel through confirmation of: goals, metrics, expectations, milestones, etc.		Training plan deployment			Matter specific check ins and broad office hours	

A detailed implementation plan can be provided to the buyer on request.

Service Management

Maintenance and Release Windows:

Everlaw operates on a standard 4 week release schedule for planned releases, which deploys the newest version of Everlaw to all users and typically results in less than 30 minutes of downtime for users. When significant issues require urgent off-cycle resolution, Everlaw may initiate a hotfix which results in a short period of downtime for end users. Users are alerted to any upcoming releases by an in-platform banner, and can choose to receive email notifications as well.

Everlaw's uptime exceeds 99.95% annually, including scheduled maintenance windows. Everlaw's Recovery Time Objective (RTO) is 2 hours and Everlaw's Recovery Point Objective (RPO) is 4 hours.

Customisation:

Different customisations are available depending on a user group's permissions, ranging from Organisation Admin, to Database Admin, to Project Admin, to customised granular user project permissions. User permissions can include restricting access to documents,

categories/ codes and the whitelisting of locations, together with restriction of translation and generative AI (GenAI) features.

From within Everlaw's Organisation Admin module, an administrator simply needs to click "Add New Database" and provide a name. They may optionally build off of an existing project (case) or template (including codes, layouts, search term reports, production templates, and more). A new project will instantly be created with the desired settings. From there, the project can be further customised to meet the specific needs of that matter.

Areas that can be customised include; homescreen layout; upload/ processing settings, including deduplication, OCR and imaging options; document clustering scope; search parameters (including parameters); results table metadata fields displayed; review window layout; assignments (batches) of documents and how these are delivered to reviewers; categories/ codes for tagging documents; redaction stamps; predictive coding model settings; production and other export settings; exhibit bundle configuration.

Customisations are carried out in Everlaw's easy to use consumer friendly user interface , with wizard-driven processes for multi-stop customisations.

Scaling:

As a native-cloud platform, Everlaw is highly scalable and can support projects with hundreds of users and millions of documents with no performance impact. The specific hardware performance and computation cycles will vary automatically based upon customer needs.

The Everlaw platform leverages AWS cloud storage, which can be instantly scaled up or down as necessary, with no practical limits on the amount of data that can be stored or processed per matter.

Everlaw production environments include logical and physical separation of components where appropriate. Production, testing, and staging environments are also logically separated to ensure security of sensitive data and proper change control procedures.

Service Constraints

Email/ ticketing/ telephone support:

Live support is available between Monday to Friday on a 24 hour basis, and on a 16 hour basis on Saturday and Sunday (2pm - 6am GMT).

System requirements:

Everlaw requires the following:

- Internet connection required;
- Windows, MacOS or Linux for desktop/ laptop;
- iOS, iPadOS or Android for mobile;

- Up-to-date OS-appropriate version of Chrome, Firefox, Edge or Safari;
- Standard hardware to support OS/ browser installed;
- Minimum browser dimensions supported are 960px wide x 700px high.

Service Levels

Everlaw's uptime exceeds 99.95% annually, including scheduled maintenance windows. Everlaw's Recovery Time Objective (RTO) is 2 hours and Everlaw's Recovery Point Objective (RPO) is 4 hours.

Outage and Maintenance Management

Everlaw operates on a standard 4-week release schedule for planned releases, which deploys the newest version of Everlaw to all users and typically results in less than 30 minutes of downtime for users. When significant issues require urgent off-cycle resolution, Everlaw may initiate a hotfix which results in a short period of downtime for end users. Users are alerted to any upcoming releases by an in-platform banner, and can choose to receive email notifications as well.

Everlaw consistently maintains an annual uptime exceeding 99.95%, inclusive of scheduled maintenance. Everlaw's Recovery Time Objective (RTO) is 2 hours and Everlaw's Recovery Point Objective (RPO) is 4 hours.

Our business continuity and disaster recovery plans are developed using insights from regular risk assessments, vulnerability scans, and threat analyses, along with third-party and vendor risk evaluations. These plans and our incident response procedures are tested at least once a year, playing a crucial role in refining our continuous risk assessment and management strategies.

AWS provides dashboards in the event of any outages, and we have internal dashboards and defined processes that handle and communicate outages between our relevant teams, including our Engineering and Customer Experience teams. External communications are handled by our Customer Experience team where necessary.

Financial Recompense Model for not Meeting Service Levels

If the buyer requests and Everlaw accepts, Everlaw and the buyer to discuss and agree appropriate service levels, together with any financial recompense model for not meeting these, and reach agreement prior to an order being placed (the terms of which are to be documented in the order form as agreed between both parties).

4. Provision of the service

Customer Responsibilities

Everlaw's [Terms of Use](#) cover user access to and use of our sites (such as Everlaw.com and Everlaw.co.uk), software, services, blogs, online forums, and community and social media platforms.

Selecting "I accept Everlaw's Terms of Use and Privacy Notice" when you create your account or accessing or using our Service means that you agree to be bound by these Terms of Use and our Privacy Notice.

Technical Requirements and Client-Side Requirements

Everlaw is a SaaS solution, which means that there will be no hardware for the buyer to purchase or maintain. Built on AWS, the Everlaw platform can scale up or down in an instant to accommodate unlimited users, cases, and documents. The core customer side requirement is the ability to assign a system administrator, managing the document lifecycle process within the platform.

On the technical side, the buyer is using up to date versions of Chrome, Firefox , Edge, or Safari and has a stable internet connection.

Everlaw can be used on Windows, MacOS or Linux hardware (provided the requisite browser requirements are met). Everlaw is also accessible through mobile devices with no need for an app (the browser and internet requirements are otherwise the same as for desktops or laptops).

Detailed technical requirements and customer-side requirements can be discussed with the buyer prior to an order being placed.

Outcomes/Deliverables

Customers are able to produce documents to appropriate industry standard formats in the course of their inquiries, investigations, litigation, arbitration, tribunal, regulatory or other work requiring these capabilities.

Upon the completion of the contract, admins with appropriate permissions can export a copy of a project on a self-service basis at no additional cost. Data can be exported in a variety of formats, and can comprise all project data including: native documents, extracted text, images (both redacted and unredacted, in PDF and/or TIFF format depending on how users have created thes in the platform), metadata (in an industry standard load file or a CSV) and audit history (in CSV format).

Data can then be archived/ stored by the user, and/ or re-uploaded into Everlaw or another platform should it be needed again. Should you require Everlaw to do this for you, it would fall under the scope of our Professional Services as set out in our Pricing document, and can be delivered on encrypted media or via fileshare.

As an alternative, it is possible to suspend the project if it is likely the matter will be needed in the short to medium term (this would continue the contract but at a lower contractual rate as per Everlaw's pricing documentation).

Admins with appropriate permissions are also able to delete their data, with or without exporting it.

On a customer's request, upon termination or expiry of a contract, Everlaw will return or delete all customer data. Admins with appropriate permissions are also able to delete their data, with or without exporting it. Once deleted all data associated with a project, including the documents in a project are permanently deleted.

Development life cycle of the solution

All of our customers are operating on the most up-to-date version of Everlaw. Our product team is constantly innovating and improving the platform. New features are delivered every four weeks, and automatically deploy to the platform at no cost and with no maintenance requirements. Last year alone, we released more than 230 new features and improvements to the platform to make sure our customers are future-ready and at the forefront of innovation.

All of this happens quickly during non-business hours, which means that we are able to deliver this high level of innovation while still maintaining an industry-leading uptime higher than 99.5%, including scheduled maintenance.

Each release is accompanied by a set of detailed release notes, and a walkthrough of the new features will appear automatically on the home page for each user so they can stay up to date on the changes. We believe innovation is critical in the ever-evolving digital landscape but should never come at the expense of user experience.

Changes to both infrastructure and software are developed and tested in a separate development or test environment before implementation. The Everlaw Configuration Management Policy dictates that all changes must be documented and approved by the Configuration Change Review Group (CCRG). The CCRG consists of cross-functional experts, and ensures that all changes to the Everlaw Platform meet our strict standards for quality and security.

Security Impact Analyses

Changes with potential security implications are subject to a Security Impact Analysis. This analysis is crucial in identifying potential risks and determining necessary mitigating actions to maintain our platform's integrity and security.

Emergency Changes

For urgent modifications, Everlaw employs a formalised emergency change management process that maintains rigorous review and approval standards but operates at an accelerated pace. This ensures that even in urgent situations, changes are implemented without compromising security or performance. All necessary approvals are obtained and documented before any emergency change is initiated.

Consistency Across Networks and Applications

Our change management procedures apply uniformly across the board—from network device adjustments to application development. Every change is logged, analysed for security implications, and must receive formal approval before implementation.

Documentation and Accessibility

Change management policies and procedures are comprehensively documented and reviewed annually to adapt to new challenges and regulatory requirements. These documents are readily accessible to all Everlaw employees, stored in a shared folder and on the company intranet, ensuring that our team is always informed and compliant with the latest standards and practices.

After-sales Account Management

Everlaw will assign a dedicated and experienced Customer Success Manager (CSM) to this engagement, who will lead the onboarding and ongoing account management support.

Our CSM will have the full backing and support of the company's customer support, data operations and user education teams.

Termination Process

Just as Everlaw has a straightforward onboarding process, and a successful track record of migrating hundreds of customers onto Everlaw from large enterprise on-prem eDiscovery, Everlaw believes in making the transition out of Everlaw just as easy and efficient, should the time or need arise, such as end of contract.

Upon the completion of the contract, admins with appropriate permissions can export a copy of a project on a self-service basis at no additional cost. Data can be exported in a variety of formats, and can comprise all project data including: native documents, extracted text, images (both redacted and unredacted, in PDF and/or TIFF format depending on how users have created them in the platform), metadata (in an industry standard load file or a CSV) and audit history (in CSV format).

Data can then be archived/ stored by the user, and/ or re-uploaded into Everlaw or another platform should it be needed again. Should you require Everlaw to do this for you, it would fall under the scope of our Professional Services as set out in our Pricing document, and can be delivered on encrypted media or via fileshare.

As an alternative, it is possible to suspend the project if it is likely the matter will be needed in the short to medium term (this would continue the contract but at a lower contractual rate as per Everlaw's pricing documentation).

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Whilst customers are able to carry out this process themselves at no additional cost, they can optionally request that Everlaw performs a managed data export from the Everlaw platform on their behalf in the form of a Professional Service and for example delivers it on physical media, the charges for which are set out in our Pricing Document.

5. Our experience

Case Studies

Freeths in High-Profile Post Office Horizon Case

Freeths managed the complex group action against the Post Office on behalf of hundreds of innocent sub-postmasters and postmistresses who were accused of theft, fraud and false accounting due to a flawed computerised point-of-sale system.

James Hartley, partner and head of Dispute Resolutions at Freeths, took a hands-on approach in the critical discovery process and found the Everlaw platform instrumental in navigating through extensive documentation and uncovering evidence crucial to the case.

"Everlaw provided us with a strategic edge in winning the case," said Hartley. "Its intuitive features and robust functionality enabled us to efficiently manage vast amounts of data and identify key evidence essential to our strategy."

"The Everlaw platform was a secret weapon throughout this case," Hartley said. "Its ability to streamline collaboration and empower us to work seamlessly, even in a paperless trial environment, was unparalleled. Without Everlaw, navigating through the document dumps would have been overwhelming."

"Don't underestimate the efficiency and effectiveness of technology," he advised. "With the right tools, even small teams can achieve remarkable results. Everlaw proved to be a game-changer for us, and I would recommend it to anyone navigating complex litigation."

Freeths were supported by an Everlaw partner during the process.

Major Non-Ministerial Government Department

Everlaw has been used successfully on multiple matters through a partner organisation by a major non-ministerial government department under an alternative CCS Framework.

US Federal Government Agencies

In the United States, Everlaw is deeply familiar with federal agency deployments, having supported several U.S. Department of Justice (DOJ) Divisions and an enterprise-wide contract for all U.S. Department of the Interior (DOI) bureaus and major offices. We've met agency needs across use cases including litigation, administrative records, FOIA, and congressional oversight, all with proven results.

Everlaw's partnership with these federal agencies has allowed them to make significant improvements in dealing with large volumes of data, streamline workflows, and accelerate case resolution timelines. These capabilities have also broken down silos both within and between agencies, enhancing collaboration among teams stretched across the country.

Whether it's serving both the civil and criminal sides of the DOJ, navigating the various missions and uses across DOI bureaus, or quickly onboarding thousands of new users, Everlaw is a helpful resource to federal agencies.

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United States Attorneys General

All 50 U.S. state Attorneys General, rely on Everlaw for discovery and litigation, including the San Francisco, Ohio and Indiana Attorneys General.

For example in 2016, when the Indiana Attorney General (IAG) became involved in a large multistate matter, the team discovered Everlaw and found out how easy it was for the platform to navigate this vast multistate matter involving dozens of State Attorneys General.

While the IAG deals with a handful of large cases that would require Everlaw's powerful document review features, the team was convinced when they saw the post-review tools and Storybuilder in action.

Although many of the IAG's cases are not document-intensive, Everlaw's post review features enable the team to build and test the theory and outline of a case at the beginning of a matter. Evidence can be attached to the case theory with tools to analyse and report up the chain, as opposed to putting extensive document reviews through ingestion, processing, and coding before post review. The IAG team is able to identify what potential statutes have been violated by the targets and what elements are to be established to show that there is a viable cause of action.

Justin Hazlett, Section Chief of Consumer Litigation, said; "Everlaw has enabled our case teams to collaborate more efficiently. We use Storybuilder as our playground to test multiple or novel theories early on in the case, follow logical inferences to refine the theory all in real time, saving us time and effort from bringing a case that is not defensible."

For the IAG, implementing Everlaw was seamless. Because it is a cloud-based solution, there was no need to rely on the IT department to install the platform, and updates are automatic. The team found the Everlaw system to be very user friendly – new law clerks get what they need to get started by simply watching the tutorials and using the platform.

Customers

Notable Everlaw Customers include:

HomeServe	Shepherd + Wedderburn	Travers Smith
Wickes	Womble Bond Dickinson	Addleshaw Goddard
Orrick	Mott MacDonald	Travers Smith
AECOM	Benesch	Dorsey
First Energy	Wilson Sonsini	Barnes & Thornburg
Vail Resorts	IIROC	Orrick
AmeriCorps	National Association of Attorneys General (NAAG)	

Everlaw is trusted by 1100+ organisations
Serving customers across government, law firms and corporations



  100% of U.S. State Attorneys General use Everlaw

Contact Details

Please contact Everlaw's G-Cloud team in the UK on:

g-cloud@everlaw.com

Alternatively, you can contact us on the telephone at:

0800 068 9249 (Option 1 (Sales); please ask for the G-Cloud team)