

Everlaw Service Definition

Prepared For:

G Cloud 15

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CDS Corporate Overview

Complete Discovery Source (CDS) is a privately held, minority-owned corporation supporting many of the world's leading law firms, corporations, and government agencies. We are recognised as one of the most diverse, flexible, and resource-rich providers in the industry, delivering award-winning solutions built on both proprietary and industry-standard technologies.

Our reputation for creative, client-focused approaches to complex eDisclosure challenges has been earned through consistent, highly successful outcomes. We work in true partnership with our clients, forming a unified team that delivers exceptional responsiveness and meets even the most demanding timelines. The CDS team escalates and resolves issues swiftly and continuously evaluates performance to ensure a seamless, consistent client experience. As a result, clients entrust CDS with their most sensitive, high-stakes, "risk-everything" matters.

At CDS, diversity is a core driver of innovation, creativity, and flexibility; qualities essential to supporting today's legal teams. Our culture is deeply committed to Diversity, Equity, and Inclusion (DEI), promoting equal opportunities and embracing a breadth of perspectives and expertise. This diversity strengthens our client-centric mindset and fuels our can-do approach to solving modern legal challenges.

We partner with leading technology providers, including Everlaw, to deliver end-to-end software and services across the full Electronic Discovery Reference Model (EDRM) lifecycle. Our core capabilities include preservation, forensic collection and analysis, processing, document review, analytics, production, and professional services. In addition, our Advisory Services group offers specialised consultation across all phases of the eDisclosure process, helping clients implement defensible strategies that reduce risk, improve compliance, control costs, and drive successful outcomes.

The Everlaw Solution

Everlaw is one of the most widely used review platforms on the market, providing users with the ability to process, review, investigate and disclose data for any case type. Being a cloud-based solution, Everlaw is always on the latest version, providing the latest features, fastest review speeds, and unparalleled levels of security.

Data Collection, Upload and Processing: The Everlaw solution is a full end-to-end solution from collection through to production. Everlaw can be connected directly with Microsoft O365, allowing for the collection of email, Microsoft Teams, OneDrive, and SharePoint data, as well as other non-Microsoft systems such as Slack and Google. Using this solution, data can be pulled directly from Microsoft Azure, and filtered during collection for criteria such as custodial users and date ranges. This reduces the amount of data which would need to be hosted within the review platform reducing your subscription usage.

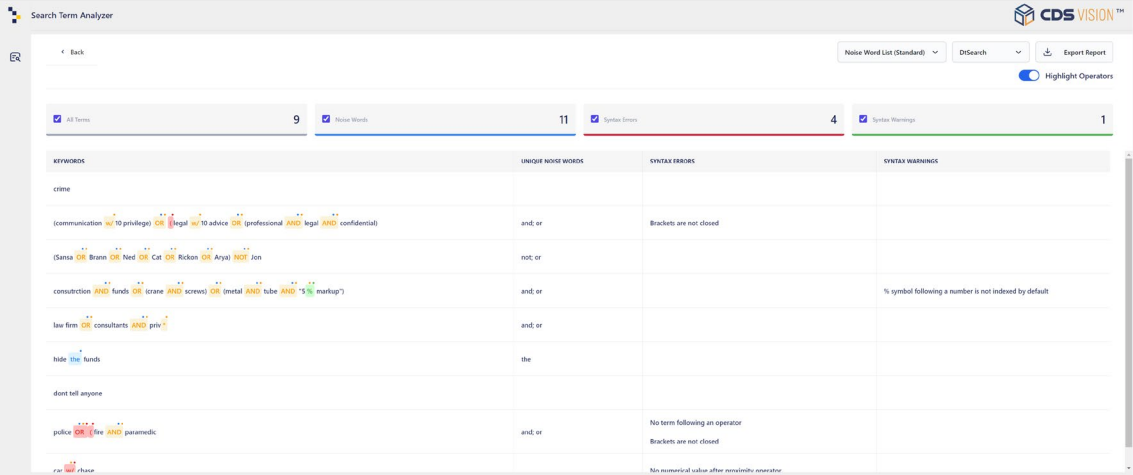
Data can also be ingested directly into Everlaw via the web UI with drag and drop processing, allowing quick and simple uploads of data sets. On processing, data will be indexed for searching, metadata will be extracted and OCR applied to image files. Automated workflows will run as soon as data has completed processing, applying technologies such as document

indexing, imaging, email threading, and search term application. Building automations reduces the amount of work required for your team, and increases the speed to access your results, with automated emails letting you know as soon as tasks are complete.

Searching, Filtering and Analytics: Once data is processed, it is ready to be searched and reviewed. Data can be structured and navigated in a number of ways to meet client centric workflows, and Everlaw extracts over 100 metadata fields which can be used to search and filter data. Metadata fields include common fields such as email senders and recipients, dates, and filenames, as well as more advanced information such as email thread groups, language types, and document concepts. Used in conjunction with CDS proprietary products such as CDS Convert and CDS Vision, data can also be filtered for categories of information, including personal data, potentially privileged communications, junk filters, and sensitive term filters.

Using CDS Convert, data can be converted and reviewed from over 35 modern data applications including mobile devices, chat applications, and social media systems. Using CDS Convert over 40 short message metadata fields are created to aid in searching and visualisation of your data.

The CDS Search Term Analyzer can be used in conjunction with the Everlaw review platform, allowing users to test, adjust and refine their keywords in bulk. This helps to ensure accuracy of search logic, and identify potential errors in syntax, and format. Terms can then be assigned in Everlaw to provide detailed metrics on search results, including unique hits, and to power keyword highlighting increasing review speeds.



KEYWORDS	UNIQUE NOISE WORDS	SYNTAX ERRORS	SYNTAX WARNINGS
crime			
(communication AND TO privilege) OR (legal AND TO advice OR (professional AND legal AND confidential))	and; or	Brackets are not closed	
(Sams OR Brann OR Ned OR Cat OR Rickon OR Arya) NOT Jon	not; or		
construction AND funds OR (crane AND screws) OR (metal AND tube AND "5% markup")	and; or		% symbol following a number is not indexed by default
law firm OR consultants AND priv	and; or		
hide AND funds	the		
don't tell anyone			
police OR fire AND paramedic	and; or	No term following an operator Brackets are not closed	
phase		No numerical value after readability operator	

CDS Search Term Analyzer

Data from Europe will often be multi-lingual due to the vast number of languages spoken across the European market. Everlaw translate utilises Google or Amazon translation APIs. Everlaw translate allows data to be quickly and easily translate the extracted text of the file.

Everlaw also provides access to machine learning algorithms including via TAR 2.0 (Continuous Active Learning). TAR 2.0 allows reviewers to code documents and have the system learn what is likely relevant, moving this data to the front of the queue, avoiding the need to review irrelevant documents. TAR 2.0 also provides advantages over using keywords for review and investigation,

making decisions based on content patterns rather than direct keyword hits. Using TAR 2.0 the system will feed your review team documents as it learns, or investigators can manually identify a key document and allow the system show the documents which are most similar to the one you are interested in. TAR 2.0 can be used both to power a review, or to provide quality control checks of reviewers, identifying where human reviewers may have made mistakes, or missed key data.

Generative AI and Innovation: Everlaw also provides an industry leading generative AI solution which is already available within the platform via Everlaw Deep Dive. Everlaw Deep Dive allows users to search and analyse massive data sets (over 10 million documents), by asking natural language questions. Everlaw will then analyse your document population, and provide a response grounded in evidence, this evidence includes a list of documents, with references to the point in your question, a weighting of how relevant the document is to your question, and a quote, showing the key evidence in the document.

Everlaw Deep Dive is allowing users to get access to key documents faster, more intuitively, and earlier in the process. This can assist in high stakes investigations, as well as litigations, to find key evidence, and learn more about your case earlier. Getting information faster can drive downstream decisions such as review workflows, rooting agreed keyword searches in facts rather than guess work.

The screenshot displays the Everlaw Deep Dive interface. At the top, there is a search bar with the question "Who was aware of the risks posed by overcrowded train platforms and delayed scale maintenance?" and a "Send" button. Below the search bar, the results are shown for the question. The results include a summary of the findings, a list of resources, and a table of relevant documents and quotes.

Who was aware of the risks posed by overcrowded train platforms and delayed scale maintenance?

2024/03/22, 5:31 pm • Searched across entire document set • Joseph Keany

The Long Island Rail Road did not formally assess or address the dual risks posed by station crowding and delayed scale maintenance. 1 5 Two station supervisors did raise concerns about overcrowding during peak summer hours, but did not address scale maintenance. 4 3 2

Resources 1

Potentially relevant documents 206 All quotes 28 Quotes used in response 5

View in results table 28 Quotes Filter

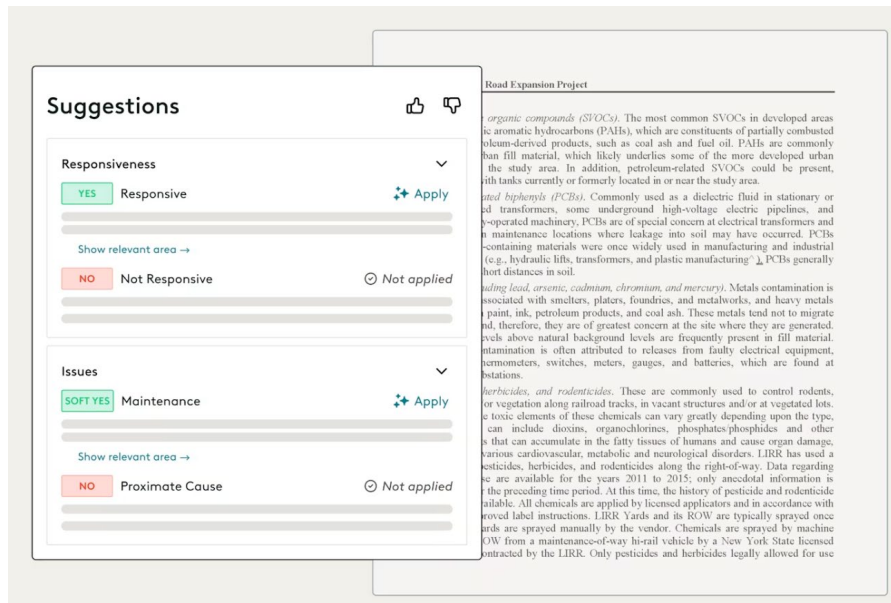
Reference	Relevance	Quote
1	5 Highly relevant	We have determined that no structured evaluation will be needed concerning combined risks during peak travel days. #100.1
2	5 Highly relevant	Souks reiterated her concerns regarding platform capacity during summer travel. #103.4

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Everlaw Deep Dive

Everlaw AI Coding Decisions, allows Subject Matter Experts provide “prompts” outlining case details and coding criteria as they would to a human reviewer. The AI then analyses the data

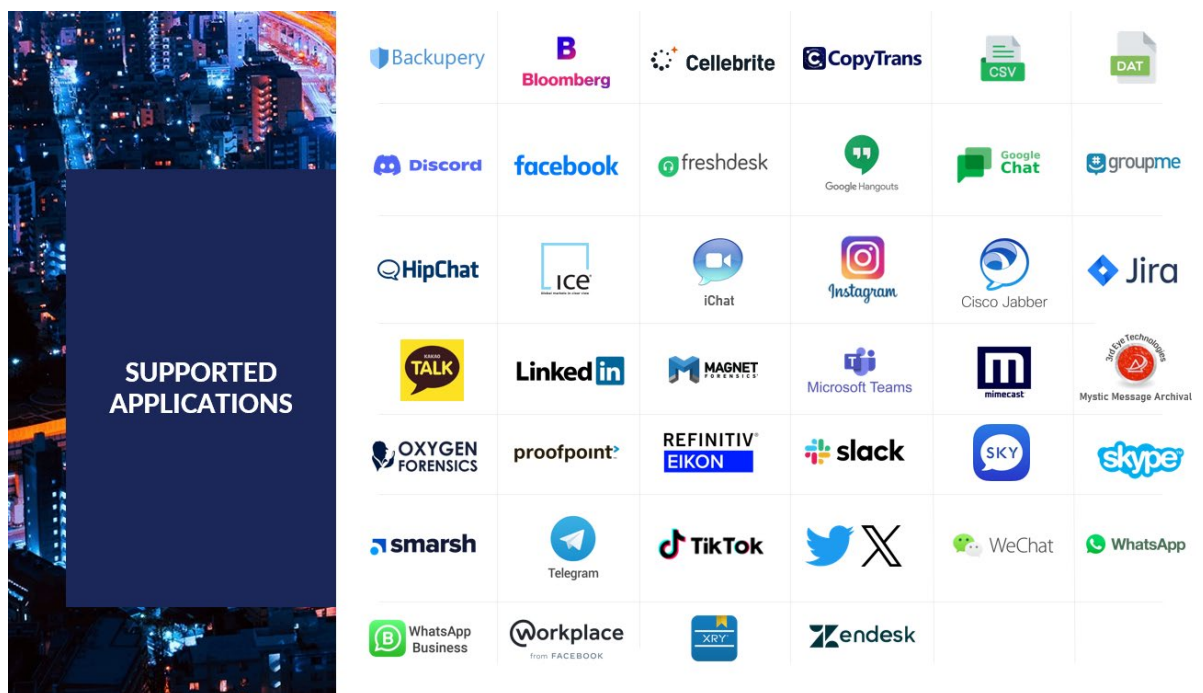
coding the document with four choices Yes, No, Soft Yes, Soft No, as well as a description of why it made that decision, helping legal teams manage complex cases, reduce review time, and improve accuracy.



Everlaw AI Coding Decisions

Document Review and Coding: The Everlaw review platform is innovative, and easy to use with a UI built to simplify the review experience via document lists, filters and visualisations created for individual users. The Everlaw viewer provides extremely fast doc-to-doc loading speeds, allowing 99% of business related documents, audio, video and chat data to be reviewed directly within Everlaw. This ensures data from nearly any system is accessible in a single workflow.

Everlaw powered by CDS Convert provides short message viewer for structured data formats (JSON, XML, JS) extracted from systems such as mobile phones, social media (Facebook, LinkedIn, Instagram), and chat platforms (Teams, Slack) which have been converted to the RSMF Format. This format allows for modern data types such as gifs, reactions, emojis, edited and deleted messages to be displayed, searched and produced, with pre-platform filtering and customisable document unitization.



Support Data Formats

As part of the Everlaw review experience, data redaction is quick, simple and simply requires users to draw boxes over the data requiring redaction using various redaction tools and types. Bulk redactions for keywords or patterns can be applied across an entire data set using Everlaw Batch Redaction, automating large quantities of redaction work. Used in conjunction with CDS Vision, important information such as personal data can be automatically redacted quickly. Everlaw redaction also allows users to review and redact Excel files directly within the viewer, removing the need to have to convert often large Excel files to PDFs which may span thousands of pages, breaking columns and rows across multiple pages.

When conducting a review, Everlaw provides simple yet powerful functionality to code documents. Customise and/or template your coding layouts for ease of access, utilising single or multi choice fields, required fields, and comment boxes to easily make decisions on your data, including relevance, issues, and privileged coding. These coding decisions can be visualised with customisable dashboards, identifying review decisions, progress, and remaining documents for review.

Exporting data from Everlaw is simple, with various formats available including customisable Excel metadata lists, dashboard and visualisations reports, native files exports and PDF bundles. For formal document disclosures the Everlaw production module can be used to bates stamp documents, apply placeholders, burn in redactions and add headers and footers to documents. The Everlaw production module can meet any formal production obligation, allowing data to be loaded to any review platform via a load file (DAT, CSV, OPT) with natives, images and text.

Security, Access and Regulations: Everlaw provides sophisticated security controls both from early detection and prevention, through to storage. Everlaw is compliant with security standards including ISO 27001, ISO 27018, SOC 2, Type II and III, Cyber Essentials Plus, and dozens more industry certifications. CDS' data centres in Europe have been specifically built to comply with UK, EU, and Swiss data privacy and security standards. The facilities address the need to process and host sensitive data in compliance with GDPR, UK GDPR, and Swiss FADP and FINMA regulations and laws.

Access to Everlaw can be secured with two factor authentication, which can be provided through multiple methods including auto generated emails, application based tokens, IP address restrictions or Single-Sign-On (SSO). When accessing Everlaw, role-based access can be provided on an extremely granular level with roles being templated for ease of use, and to avoid potential issues with incorrect permissions being granted. Users can be provided administrative roles with full permissions and access to all cases, down to review based roles who have limited access to specific cases, technologies and features. Once a user has access to a case, documents and fields can be secured to specific groups restricting them completely, or providing them as read only.

CDS Services and Capabilities

CDS provides a comprehensive suite of services across the full EDRM, supported by our industry-leading review platform, proprietary eDisclosure add-ons, and exceptional project management teams. Together, these capabilities help reduce overall costs, minimise risk, improve efficiency, and deliver earlier access to key data. Our experienced professionals offer task-specific support, workflow guidance, technology training, and strategic recommendations to drive the best possible outcomes. Below is a summary of our most utilised services.

Digital Forensics and Data Analysis

The CDS forensics team brings more than 125 years of combined experience in computer forensics and is uniquely equipped to manage data collection, forensic analysis, and expert testimony for even the most sensitive matters, including intellectual property disputes, employee misconduct, and breach-of-contract investigations.

Standard forensics services include:

- Data mapping and assessments
- Data preservation
- Collection and analysis of PC, Mac, mobile device, and external media data
- Server and enterprise application data collection and analysis
- Cloud, social media, and website data collection and analysis
- Forensic imaging, analysis, and expert testimony

Data Processing and ECA Filtering

All collected electronically stored information must be processed, and modern matters often involve hundreds of file types with data volumes increasing exponentially each year. Managing

this scale requires a robust, high-efficiency solution capable of performing industry-standard processing tasks, including:

- De-NIST and De-duplication
- Metadata, Text Extraction and OCR
- Native File Processing
- Short Message Data Processing
- Email Threading and Analytics
- Generative AI Integrations

While these processes are standardised and automated to improve efficiency and reduce cost, CDS recognises that each client's needs are unique. A client facing a one-off litigation will require a different approach than an organisation managing large-scale, repeat matters across litigations, investigations, or regulatory events. Early Case Assessment (ECA) workspaces can significantly reduce costs and increase efficiency, particularly when combined with the CDS Corporate Data Warehouse, which provides customised workflows for handling large data volumes. Key benefits include:

- **Master Data Repository:** Reduce hosting costs through a single workspace that enables searching and analytics-driven filtering.
- **Multiple Review Workspaces:** Segregate data for individual matters to improve organisation, security, and review efficiency.
- **Direct Transfer:** Quickly migrate data from the Master Repository to Review Workspaces via Batch Promotion, eliminating manual import/export steps.
- **Coding and Redaction Re-use:** Sync privilege, production, and review decisions to the Master Repository to maximise re-use of work product.

Hosting and Proprietary Products

CDS' partnership with Everlaw provides an industry leading cloud based platform which delivers unmatched speed, scalability, and security, and is continuously updated with new features and applications.

Through hosting with CDS, clients also gain access to proprietary CDS applications developed to enhance and streamline review workflows. These innovations combine advanced productivity features with generative AI to support legal teams managing large, complex, and varied matters. Our proprietary enhancements include:

CDS Vision AI Toolkit

CDS proprietary Generative AI capabilities can be leveraged alongside Everlaw to provide additional functionality. Our technology, leverages Microsoft Azure's Generative AI and Natural Language Processing to deliver deeper data insights. Key features include:

- **Document Summarisation:** Create abstractive or extractive summaries of customisable lengths using advanced NLP models.
- **AI OCR:** Enhance OCR accuracy for poor-quality scans and handwritten documents, enabling effective search and review.

- **Personal Data / Entity Extraction:** Identify personal data and key entities to support rapid identification, review, and automated redaction workflows.
- **Object Detection:** Detect objects within images to support searching, filtering, and visual analysis.
- **Image Summarisation:** Generate contextual summaries of image content to improve searchability and understanding.

CDS Convert

CDS Convert is an industry-leading short message conversion solution, originally developed in 2019, the tool enables the transformation of structured data into fully reviewable formats and provides clients with:

- **Broadest Support:** More than 40 custom-built converters covering mobile devices, social media platforms, financial systems, and ticketing tools, designed for maximum consistency and accuracy.
- **Reporting and Filtering:** Cull and refine data prior to processing to reduce downstream hosting costs.
- **Advanced Analysis:** Automatically extract over 40 metadata fields to enhance searching, analytics, and visualisation.
- **Data Unitization:** Configure conversation splitting by year, month, week, day, message count, or quiet periods to meet case-specific needs.
- **Multiple Export Formats:** Export to RSMF, PDF, JPG, EML, and other supported formats.
- **Dedicated Support:** A full-time development and support team ensuring continuous improvement and expanding compatibility with emerging data sources.

CDS Vision Search Toolkit

A suite of enhancements available alongside Everlaw designed to empower legal teams to improve quality, streamline review, gain deeper data insights, and reduce errors, without needing to rely on seasoned experts. Available enhancements include:

- **Search Term Analyzer:** Rapidly quality-check search terms for syntax errors, noise words, and formatting issues without requiring expert intervention.
- **Load File Utility:** Quickly assess incoming and outgoing productions for missing fields, metadata template issues, and field naming to ensure accuracy and defensibility.

Technology Assisted Review (TAR) and Generative AI

Technology Assisted Review (TAR), particularly through Continuous Active Learning (CAL), has become the industry standard for document review. The CDS Advisory Team consults on hundreds of projects each year, handling cases ranging from tens of thousands to several million documents.

Integrated into the Everlaw CAL helps legal teams to:

- Dramatically and defensibly reduce review volume and cost
- Improve review efficiency by prioritising documents most likely to be relevant
- Enhance quality control by identifying documents that may have been coded incorrectly

CAL workflows increase efficiency by promoting the most likely relevant documents to the

front of the queue, based on language similarities to previously reviewed documents. Human review is still required to train the model and ensure comprehensive coverage across themes and concepts that differ from previously reviewed content. While the queue updates near-instantaneously, review speed remains dependent on the capacity of the review team, which may need scaling for large matters.

Generative AI Review

Generative AI takes a complementary approach. Subject Matter Experts provide “prompts” outlining case details and coding criteria as they would to a human reviewer. The AI then analyses the data coding the document with four choices Yes, No, Soft Yes, Soft No, as well as a description of why it made that decision, helping legal teams manage complex cases, reduce review time, and improve accuracy.

The screenshot displays the 'Suggestions' section of the Everlaw AI Coding Decisions interface. At the top, there are thumbs up and thumbs down icons. Below this is a 'Topics' section with a right-pointing arrow. The main section is titled 'Health information' with a downward arrow. It contains two coding suggestions:

- NO** Identifiable patients ⌚ Not applied
 - * The document does not contain any identifying information about patients or sufficient information such that an identity could be reasonably inferred.
- SOFT YES** Identifiable doctors ⚡ Apply
 - * The document mentions 'Dr. Richard' and 'Dr. Raymond,' but without additional context, it is unclear if this information is sufficient to identify them.

[Relevant area →](#)

Everlaw AI Coding Decisions

CDS has been running Generative AI matters for over two years, and our expertise has been recognised through successful roll outs, industry awards and testing from our data science team. Over the last two years, CDS has observed that utilising AI for review can provide the following gains for legal teams:

- **Recall:** 90%+ of relevant documents identified
- **Precision:** 70%+ accuracy of relevance decisions
- **Cost Reduction:** 70%–80% lower costs compared to human review
- **Time Reduction:** 80%–90% faster review.

Professional Services

Recruiting the best talent is at the heart of CDS’ hiring philosophy, fostering a team rich in perspectives, experience, and insight. CDS builds dedicated project management “pods” around our clients, acting as an extension of the law firm or corporation’s team. These pods design bespoke workflows tailored to each client’s specific needs, ensuring consistent success.

Our team comprises seasoned professionals from law firms, corporations, and service providers, bringing a wealth of expertise to every matter. By combining legal knowledge with best-in-class technology and optimised workflows, we create a collaborative process that efficiently manages projects of any size or complexity.

Each team member has a minimum of five years' experience in eDisclosure, providing clients with informed guidance and practical solutions based on real-world experience. Our professionals operate proactively, prioritising the client experience at every stage and delivering personalised solutions aligned with project requirements.

The CDS Professional Services team holds a broad range of certifications, and while certifications reflect foundational knowledge, true expertise comes from hands-on experience with complex, large-scale matters. Our team's thought leadership is recognised through contributions to panels, blogs and educational resources.

Advisory and Migration Services

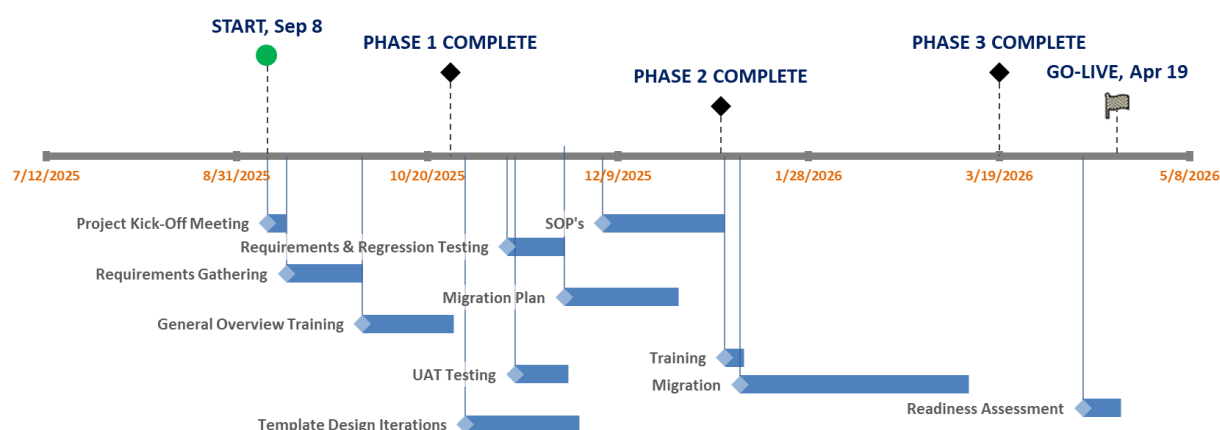
CDS provides expert consulting services as part of its comprehensive client support, specialising in technology-enabled solutions and workflow optimisation. With deep expertise in discovery processes, data management, and technology, our Advisory Services team bridges the legal and technical worlds, delivering innovative approaches to eDisclosure and data management.

Our consultants, comprising former practising lawyers, eDisclosure project managers, data scientists, and forensic specialists, recommend tools and procedures that align with each client's goals and objectives. Whether developing corporate standards, conducting gap analyses, or implementing advanced technology for complex matters, our team applies critical thinking and best practices throughout every engagement, from initial scoping and design through project implementation and training.

The CDS advisory team also includes data migration specialists with decades of experience moving petabytes of data across platforms such as Relativity Server, Nuix, Clearwell, Reveal, DISCO, and OpenText. We have developed proprietary processes, validations, and software to expedite, simplify, and ensure defensible migrations.

With Relativity Server set to sunset at the end of 2027, CDS is assisting an increasing number of clients with proactive case migrations, ensuring efficient and defensible workflows. Successful migrations require careful planning, which is why CDS has developed a robust scoping and workflow framework aligned to PRINCE2 and ITIL methodologies, incorporating key controls:

- **Regular and Structured Communication:** Weekly project calls and daily stand-ups during peak phases to provide real-time updates, quick issue resolution, and alignment across teams
- **Robust Scoping and Goal Setting:** Assess case volumes, activity levels, and priorities to create actionable plans and timelines. Milestones and deliverables are defined collaboratively, with goals tracked against SLAs and KPIs



Implementation Timeline Example

- **Staggered Migrations:** Pre-migrate backend native data, text, indexes, and other information to minimise downtime for large cases
- **Defined Roles and Responsibilities:** Comprehensive RACI matrix ensures all stakeholders understand responsibilities and points of contact, with metrics, tracking, and reporting included across all phases
- **Real-Time Tracking:** Visualisations to monitor progress, validations, and sign-offs by all parties, ensuring transparency and accountability

Flexible Storage

Everlaw offers flexible storage options to optimise the value of your investment (VOI). When subscribing to Everlaw, an initial data footprint is established, which can be expanded either through subscription growth or ad hoc “burst pricing”; additional storage without a long-term commitment.

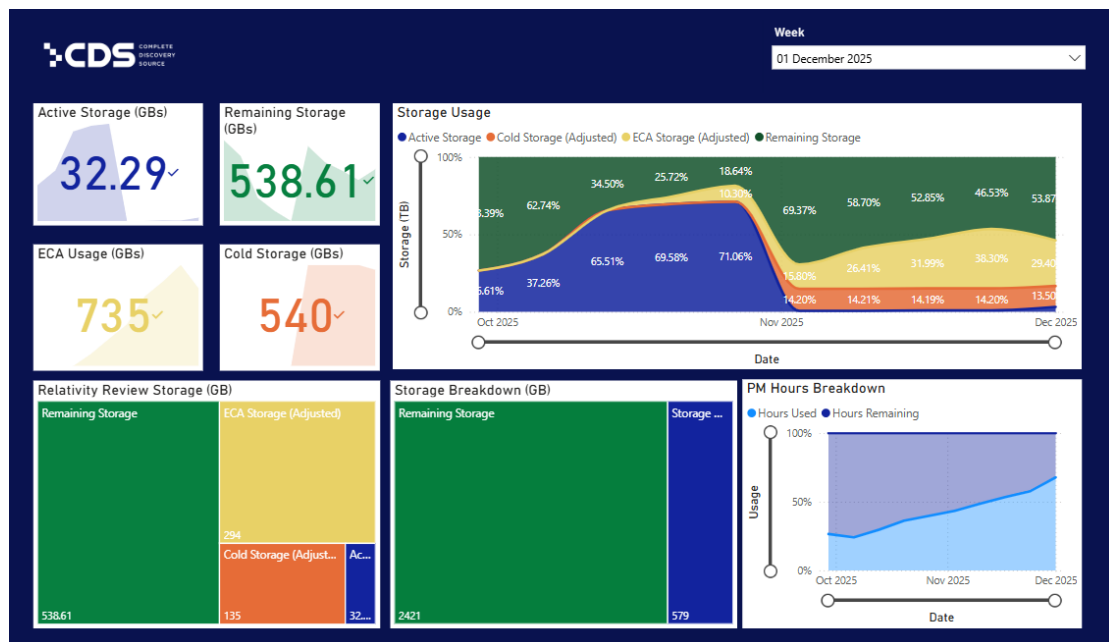
To maximise the value of allocated storage, workspaces can be assigned to different states, allowing data to be hosted at full volume (Active Storage) or at reduced volumes with limitations (ECA). These options enable more data to be hosted within the same storage footprint, optimising subscription limits and cost efficiency.

Commercial Reporting

Effective data management supports cost reduction and maximises VOI by ensuring data is hosted in the appropriate storage tier. CDS provides tailored usage dashboards that track storage consumption and platform utilisation. These dashboards update weekly, with detailed case-level reporting available to key stakeholders at scheduled intervals (weekly or monthly), including:

- Breakdown of data storage and platform consumption
- Monthly and annual invoicing summaries
- Cost forecasting to support budgeting

- Usage trend analysis to monitor potential overages



Your dedicated account manager, together with the Professional Services team, oversees governance, service delivery, and SLA compliance. Regular reviews ensure performance remains within agreed benchmarks and enable proactive identification of issues or optimisation opportunities.

Performance Reporting Cadence:

- **Weekly Operational Check-Ins:** Focused on incident response, open ticket resolution, and user feedback
- **Monthly Strategic Reviews:** Covering SLA compliance, trend analysis, and roadmap alignment
- **Quarterly Business Reviews:** Formal presentation of KPIs, contract health, and service expansion

If reporting metrics or service performance indicate a need for additional support, CDS will scale the delivery team to maintain SLAs and ensure project deliverables are met.

Pricing Scenarios

At CDS, we design bespoke service packages tailored specifically to the unique needs of each client. Through a comprehensive scoping process, we ensure that every package delivers maximum value while avoiding unnecessary costs. Our approach is grounded in providing solutions that are both efficient and cost-effective, ensuring clients receive the precise level of support and technology required for their matters.

Each package is fully adaptable with our goal to deliver a seamless, high-performance solution that maximises operational efficiency, mitigates risk, and provides tangible value throughout the lifecycle of your projects.