

AUTOMATING eDISCOVERY AND COMPLIANCE THROUGH NATIVE CONTENT WITH RELATIVITY YIELDS INSIGHTFUL GOVERNMENT AGENCY BUSINESS FOR PAE

PAE

COMPANY NAME

PAE

INDUSTRY

Government Services

LOCATION

Arlington, VA

EMPLOYEES

15,000

SERVICES

Execution of complex and critical missions by providing global logistics and stability operations, technical services and national security solutions

WEBSITE

www.pae.com

Objective

To keep pace with growing eDiscovery and compliance trends on behalf of its U.S. government clients, PAE needed to augment its ESI automation, eDiscovery and compliance engines

Challenges

- Removal of all conflict of interest
- Expedite business-critical reporting, monitoring and analysis capability
- Repeatable automation to reduce time and manpower expenditures

Approach

Partner with Hanzo to perform realtime native web communication captures, non-proprietary format exports, archives and analysis

The Hanzo Solution

- Customized scripting to maintain persistent web site log-ins
- Native content capture, viewing and full metatext content capture requirements

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— ALEX MCCOMBS,
SENIOR PROJECT MANAGER, PAE

Primer


PAE's workforce of approximately 15,000 ensures the readiness of the U.S. government for implementing homeland security, defense and civil government missions as well as foreign policy and national security objectives around the world. As part of its security solutions portfolio, PAE offers a multitude of litigation support services and products to solve the challenges of predicting and preventing a broad range of electronic business threats. A team within PAE's U.S.-based workforce assists with and directly performs electronic discovery tasks of all sizes and types, aiding in both data discovery and litigation staffing solutions. PAE manages hundreds of matters from inception to conclusion, including, but not limited to, working closely with case teams to evaluate their discovery needs based on legal background and training. The firm also makes electronically-stored information (ESI) recommendations to all involved and manages pre and post-processing workflows.

Situation

To keep pace with growing eDiscovery and compliance trends on behalf of its U.S. government clients, PAE needed to augment its ESI automation, eDiscovery and compliance engines. According to Cloud Security Alliance documentation on Legal Issues, Contracts and Electronic Discovery, “a party is obligated to undertake reasonable steps to prevent the destruction or modification of data or information in its possession, custody, or control that it knows, or reasonably should know, is relevant to either pending or reasonably anticipated litigation or a government investigation.” In the past, for purposes of native web capture or social media archival, PAE clients leveraged basic web screen captures, but found this approach lacked authenticity and did not represent a discovery “best practice.” Also, prior discovery and compliance reporting sometimes lacked basic metadata critical for litigation purposes such as, discovery authenticity and defensibility.


“PAE needed a complete forensic solution that captured defensible archives quickly and satisfied agency clientele. This solution needed to completely exclude any government client bias to maintain 100 percent credibility in separating the agency operations from the discovery process,” said Alex McCombs, Senior Project Manager at PAE.

Removal of all conflict of interest and adding automation were two critical business problems. Without repeatable automation, PAE staff would have limited client cycles for discovery and compliance, leading to greater time and manpower expenditures. PAE staff estimated an order of magnitude greater staffing and time to intelligently process paper and digital assets with significantly less relevant results or eDiscovery.



“Many PAE clients did not even realize there was a solution that automates social media capture including native content views and corresponding meta tag data.”

— ALEX MCCOMBS,
SENIOR PROJECT MANAGER, PAE



“PAE looks forward to further extending Hanzo’s native viewer capabilities into the courtroom to show an exact, ‘DVR-like’ replay of the social content instead of spending hours of expensive manpower producing pounds of paperwork. We would like to leverage Hanzo to expedite the entire eDiscovery and litigation lifecycle.”

— ALEX MCCOMBS,
SENIOR PROJECT MANAGER, PAE

Requirements


PAE’s agency clients needed a way to expedite business-critical reporting, monitoring and analysis capability. Instead of hiring expensive eDiscovery and compliance internal staff, agencies increasingly choose to outsource this role to experts like PAE. These experts operate the eDiscovery and compliance software to become “more skilled at pinpointing corporate high-risk behavior and potential infractions. Anticipating the increasingly complex requirements of their clients, PAE partnered with Hanzo, whose technology performs real-time native web communication captures, non-proprietary format exports, archives and analysis. Agencies build their “business needs” with the outside accredited, GSA-certified service partners supplying verified results to help the agencies work smarter, faster and expedite legally sound content. For example, PAE added customized scripting to maintain persistent web site log-ins, to allow for a successful website capture for a client. Additionally, this approach helps agencies prepare for uncompromised reporting, due diligence and compliance with broader and deeper archiving.

PAE agency clients have the option of internally operating the secure software process or leveraging an outside service bureau to provide robust forensic intelligence. The latter approach helps “firewall” the requesting agency operations from the hands-on discovery and compliance process. Outsourcing ensures zero government tainting during the eDiscovery process and correspondingly zero conflict of interest in any collected evidence. Courts also look favorably on using third-party contractors to ensure full compliance with eDiscovery procedures as well as a wide number of state ethics requirements. For example, a NY District court goes on record saying, “contracting with a vendor whose technical capabilities are known and can be relied upon is preferable.”

PAE anticipates that future requests for services will include eDiscovery and compliance reporting around multiple social media platforms, identification of types of fraud, “Dark Web” exploration and complex website script captures. In all instances, having the ability to capture native web content and metadata will allow PAE’s client agencies to present stronger evidence and stronger arguments both in negotiations and at trial. Lastly, most popular social networking and collaboration sites now include numerous widgets, sub-apps and chat that need to be accurately preserved for complete eDiscovery.

Solution

With tens of millions of social transactions daily from users across multiple agencies, PAE needed a scalable and automation-rich solution for electronic discovery projects of all sizes. Of utmost importance, clients require that native content be captured in a simple “DVR-like” format that is easily imported into any litigation support review tool, either hosted with PAE or within the agency’s own environment. PAE agency clientele request dozens of reproducible assets



“Today’s compliance and court procedures alongside state ethics requirements are slim around eDiscovery best practices. I fully expect to soon see substantive decisions with exacting procedures around native content viewing and full metatext content capture requirements, like those produced by Hanzo to ensure complete context.”

— ALEX MCCOMBS,
SENIOR PROJECT MANAGER, PAE

from inception to conclusion with minimal capture, import and export time for completion. Importing, exporting and documenting ESI archives as well as managing pre-and post-processing eDiscovery workflows are all essential components of PAE’s service delivery.

PAE securely oversees and assists in agency client administrative functions using an on-premise instance of Hanzo software and natively loads results into Relativity. The team’s managed service offerings include, but are not limited to, setting up users, databases, importing and exporting data, coding layouts, running advanced searches, scripts, creation of dynamic objects and running transform sets, providing various reports and identifying and addressing customers’ questions and concerns. When required, PAE’s team collaborates with the agency’s attorneys to implement a Relativity-assisted review. This includes participating in meeting and conferring with opposing counsel to discuss, agree upon, and implement an efficient and defensible workflow.

How it works

PAE first selected the Hanzo solution to achieve the automation and native eDiscovery captures required by one of their clients, after finding their legacy discovery desktop and screen capture software lacking. In an initial use case, PAE helped the client capture a web forum site that required a user to log in to access content. To successfully complete this capture PAE and Hanzo worked together to create extensive custom scripting to allow Hanzo to remain logged in during the web capture and properly capture every link, without accessing the “log out” link, which would have resulted in an immediate termination of the crawl. Hanzo was successful in fully capturing the full native content of the web forum, allowing PAE to meet the client’s content and time requirements under budget.

Client attorneys and PAE first determine what specific web content elements are required, and what may need to be considered, if the context of any content becomes important. PAE then creates a new project using the Hanzo For Government suite to extract target web data exactly as it appears online or in an app and dutifully archives the content in a Government certified version of AWS. In contrast, legacy solutions extract content and separate metadata files in proprietary silos. Often data captured in non-automated solutions results in inaccessible data without importability into Relativity for complete analysis. Understanding the end to end metatext, content and complete discovery process is far beyond legacy screen captures and PDF creation.

Technology is changing rapidly in eDiscovery and compliance reporting, and PAE fully expects to maintain a “best in class” practice on behalf of its government agency clientele. Mastering one or several forms of web-based discovery is only the first step. With the proven success of its customized solution developed with Hanzo, PAE is committed to further automating eDiscovery execution with powerful business requirements and easily advanced input methodology that will scale to meet future complex agency requests.

ABOUT HANZO

Hanzo is Fortune 1000's most relied-upon solution for legally defensible native format behind the firewall collection, preservation and analysis of web and social media content. We collect anything you can see in a browser. Amazing companies in the Banking, Financial Services, Investment Management, Energy, Manufacturing, Telecommunications, Pharmaceuticals, Life Sciences and Government industries trust Hanzo. We are also relied upon by large Technology companies who are often involved with litigation and IP protection.

UK Headquarters

Leeds

No 1 Leeds

Whitehall Road

Leeds

England LS12 1BE

US Headquarters

New York

77 Water St.

New York

NY 10005

United States

TO SCHEDULE A DEMO CLICK HERE OR CONTACT
sales@hanzo.co