CategoriX is Xerox Litigation Services’ proprietary technology-assisted review solution that dramatically improves the speed, accuracy and consistency of litigation review and enhances attorneys’ ability to quickly search and filter information in large document collections in litigation, investigations, compliance and regulatory matters.

CategoriX harnesses the expertise of attorneys and subject matter experts most knowledgeable about the case early in the process, and applies statistical and machine-learning techniques to calculate graduated relevance scores for each document in the collection.

CategoriX can help you meet a wide range of review goals:
• Automated review prioritization
• Enhanced quality control
• First-pass review
• Defensible document reduction

With CategoriX, the Xerox Litigation Services team of experts supports you throughout the process to ensure all review goals are achieved in the most efficient, cost-effective and defensible manner.

Discover the CategoriX Advantage

CategoriX combines powerful technology with human expertise to deliver a high-quality document review. There is no need to install or maintain software, scale servers, train IT personnel or end users, or staff technical experts in-house. Xerox Litigation Services’ technical experts take care of all that for you. Statisticians and linguists guide the technology and support the process—from sampling and model development to design and execution of performance measurements—guaranteeing optimal review accuracy and efficiency. Our experts also use other methods, such as strategic search, in various parts of the technology-assisted review process in order to improve the review process and results.

All key inputs, decisions and findings are thoroughly documented for each project to ensure that the process and results stand up in court. Together, our technology and technical expertise complement your legal review teams so you can focus on the matter at hand—this is the CategoriX advantage.
Accelerate and Simplify Your Litigation Review

How CategoriX Cuts Costs and Improves the Quality of Your Review

CategoriX enables legal teams to significantly lower the cost and time of document review while optimizing review accuracy and consistency.

With CategoriX, legal teams can:
• Zoom in on the key documents and issues that merit attention, leading to earlier case insights and a faster path to production
• De-prioritize documents classified as non-relevant, saving time and reducing expenses
• Achieve greater accuracy throughout the review with consistent application of expert assessments
• Quickly identify and resolve coding discrepancies by utilizing built-in algorithms that flag anomalies in manual coding
• Optimize workflows by seamlessly integrating CategoriX-ranked documents into reviewers’ queues on the OmniX™ platform
• Rely on an iterative process and measurable results that stand up

How CategoriX Works
The CategoriX review process harnesses the expertise of attorneys and leverages Xerox Litigation Services’ technical expertise to guide the technology—which is run by Xerox Litigation Services experts in our own data centers. A typical project workflow is as follows:
• Legal and subject matter experts assess samples of documents from the review population
• CategoriX models are built based on these coded documents
• CategoriX iteratively incorporates feedback from coded and QC’d samples to progressively improve the accuracy of its relevance scoring
• Once optimal accuracy is achieved, CategoriX reviews the rest of the document population and ranks each document according to how likely it is to be relevant

The CategoriX Process

Confidence in Methodology and Results
Legal teams can be confident in the defensibility of the CategoriX methodology and process—which has been court-tested time and time again. Key elements of the CategoriX process include the following:
• Involve Appropriate experts
  Attorneys concentrate on subject matter and case strategy while technical, search, and statistics experts drive process and technology
• Utilize an Adaptive approach
  The technology utilizes an iterative modeling process with analysis and course-correction built into each iterative cycle
• Create an Audit trail
  Standardized reporting and documentation ensures detailed records of all key inputs, decisions, and results
• Measurement
  Statistically valid measures of precision and recall are generated at every stage of the process, for ongoing QC and final QA
• Leveraging additional methodologies
  Additional methodologies are employed, such as keyword search, to leverage the strengths of multiple techniques while mitigating the weaknesses of each
CategoriX Saves a Global 50 Energy Company Nearly 70% in Review Costs

The Situation
A Global 50 company subpoenaed by a regulatory agency had to review two million documents in under three months—a task that would have required hiring a large team of attorneys at a significant cost.

The Solution
The company and its outside counsel turned to CategoriX to accelerate the review by minimizing the volume of documents subject to manual review.

The Results
• Completed manual review and quality control in just 54 days with ten attorneys—versus the 425 days it would have taken with the same team to complete the review
• Saved nearly 70% in review costs when all two million documents were categorized for responsiveness, with CategoriX classifying 93% of the documents
• Achieved high-quality, measurable results, producing virtually only all relevant documents for the matter
• Confidence in methodology and quality of the client’s document review

CategoriX Defensibly Reduces Client’s Review Burden by More than 90%

The Situation
A Fortune 500 company raced with a massive volume of data for a patent-related responsiveness review needed a strategy to eliminate non-relevant data from more than three million documents to effectively manage time, resources and expenses for the matter.

The Solution
Xerox Litigation Services designed an end-to-end data targeting strategy to defensibly eliminate non-relevant documents at each stage of the post-collection e-discovery process utilizing advanced search term culling sample-validated attribute-based culling and CategoriX review.

The Results
• Successful combination of three different approaches defensibly eliminated 90% of the original review burden

Xerox Litigation Services, the electronic discovery division of Xerox Corporation, is the trusted partner of corporations and law firms worldwide. We offer a suite of flexible, full-service capabilities to support litigation, investigations, regulatory compliance and other matters, delivering end-to-end services, industry-leading technology and consulting expertise to simplify your e-discovery processes. With operations across the globe, Xerox Litigation Services offers the options and scalability clients need to handle e-discovery challenges of all sizes and complexity.

For more information on Xerox Litigation Services, visit www.xerox-xls.com, call 877.273.3887 or email info@xls.xerox.com.