

How Proteus Transformed Spreadsheet Exports into Trial Evidence



CHALLENGE

A Washington, DC-based AmLaw 100 law firm faced a challenge with call center records stored in specialized online regulatory databases and legal research platforms (such as Pathfinder). The export functionality in these systems only generated large spreadsheet logs, with each row representing an individual record. These logs contained personally identifiable information (PII) and other confidential details.

With tens of thousands of rows requiring careful searching and redaction at the cell level, the firm needed a more practical and defensible way to prepare the data for review and production. They turned to Proteus.

SOLUTION

Proteus developed a workflow that converted each spreadsheet row into an individual PDF file, ensuring that all fields visible on the web version of the call log entries were captured. Once converted, the records were processed into a review platform where they could be indexed, searched, and organized. This allowed the litigation team to quickly identify a smaller, relevant subset of records based on search term hits.

Focused review and targeted redactions were then applied only where necessary, dramatically reducing the overall review burden.

RESULT

The new process saved significant time and resources by eliminating the need to comb through spreadsheets line by line. Presenting the data in a more accessible PDF format also made the records easier for attorneys to digest and use in litigation.

By combining technical expertise with practical workflow design, Proteus enabled the firm to handle sensitive call log data efficiently and securely, which turned a time-consuming obstacle into a streamlined solution.

Want to talk about digital transformation at your organization?
Email us at hello@proteusdiscovery.com



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