

GoldFynch-Specific Timekeeping Descriptions

*Designed for paralegals, project managers, litigation support,
and any timekeeper working on a GoldFynch case*

Data Identification and Intake

- ☐ Consult with client about data sources, custodians, and upload workflow in GoldFynch
- ☐ Advise client on preservation steps before uploading materials
- ☐ Map custodians and data sources to the planned GoldFynch case structure
- ☐ Evaluate anticipated data formats to determine upload and processing needs
- ☐ Review client's system information to confirm the data is accessible for upload
- ☐ Prepare GoldFynch case for intake including tags, folders, and user access

Collection and Pre-Upload Preparation

- ☐ Coordinate with client IT to collect files for uploading into GoldFynch
- ☐ Prepare pre-upload documentation including custodian lists and date ranges
- ☐ Review file types to confirm compatibility with GoldFynch processing
- ☐ Validate collected datasets and prepare them for staged upload
- ☐ Create and organize pre-upload folder structure in GoldFynch
- ☐ Complete chain of custody documentation and map it to GoldFynch metadata fields

Processing in GoldFynch

- ☐ Upload client data to GoldFynch and monitor ingestion
- ☐ Perform initial data validation and review processing exceptions
- ☐ Verify deduplication and file expansion results
- ☐ Conduct quality checks on OCR output and metadata fields
- ☐ Confirm custodian assignments and update GoldFynch metadata as needed
- ☐ Organize documents into review sets and apply priority tags
- ☐ Record processed data volumes and custodians using GoldFynch reporting tools
- ☐ Review analytics results including near-duplicate detection and email threading
- ☐ Investigate processing anomalies flagged by GoldFynch

Search and Filtering

- ☐ Build keyword searches including Boolean queries in GoldFynch
- ☐ Test hit counts and adjust query syntax based on results
- ☐ Identify responsive material using filters, tags, and metadata exploration
- ☐ Conduct privilege sweeps using custom search terms
- ☐ Create and save search templates for ongoing workflows
- ☐ Evaluate false positives and refine filtering criteria

Review Workflow Management

- ☐ Create and configure review sets for responsiveness, privilege, and issues
- ☐ Train reviewers on GoldFynch interface and tagging protocols
- ☐ Perform first-pass review and apply appropriate tags
- ☐ Conduct second-pass QC of reviewer decisions
- ☐ Manage tag consistency and resolve family-level conflicts
- ☐ Monitor reviewer progress using GoldFynch review metrics
- ☐ Prepare privilege and redaction log materials using GoldFynch export tools

Production Preparation in GoldFynch

- ☐ Scope production requirements and configure GoldFynch production settings
- ☐ Create production templates including Bates and metadata configurations
- ☐ Perform QC of documents before production generation
- ☐ Generate TIFF, PDF, native, or mixed-mode productions in GoldFynch
- ☐ Review and validate load files and metadata exports
- ☐ Resolve inconsistent tags and family conflicts identified during production prep
- ☐ Reprocess files as needed to correct production issues
- ☐ Deliver production package to case team and document the transmittal
- ☐ Update GoldFynch production logs and verify completeness

Case Administration and Support

- ☐ Add and manage users in GoldFynch including permissions and Organizations
- ☐ Prepare status updates summarizing processing, review, and production progress
- ☐ Coordinate with client regarding billing plan changes and case size management
- ☐ Reclaim storage and optimize case size using GoldFynch space tools
- ☐ Support Organization-level workflows including consolidated billing
- ☐ Document project steps inside GoldFynch for audit purposes

Have question about GoldFynch?

Get in touch on our [Contact Page](#) or [Schedule a Demo](#).

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