



COURSE DESCRIPTION

The **Veritas eDiscovery Platform 9: For Administrators** course is designed for legal professionals that perform Electronic Discovery on Electronically Stored Information. The course is designed to be delivered over two (2) days. It focuses on the Identification and Collection of the Electronic Discovery Reference Model (EDRM), as well as, the installation, configuration and maintenance of the Veritas eDiscovery application. This class covers the major functionalities of the Veritas eDiscovery Platform as well as best practices for managing eDiscovery projects using Veritas eDiscovery Platform. It includes treatment of processing, search techniques, workflow management, export guidelines, and so on.

Delivery Methods

This course is available in the following delivery methods:

- [Instructor-led training \(ILT\)](#)
- [Virtual instructor-led training \(VILT\)](#)
- [Learning Lab](#)

Duration

- Instructor-led training - ILT: 2 days, including 6 months of lab access
- Virtual instructor-led training - VILT: 2 days, including 6 months of lab access
- Learning Lab – Self-paced lesson guide plus 6 months of lab access

Course Objectives

By the completion of this course, you will be able to:

- Setup and configure the system.
- Configure the eDiscovery Platform server and eDiscovery Platform Web server for Legal Holds.
- Perform maintenance actions, for example backups
- Understand installation and upgrade fundamentals.
- Create and setup Cases.
- Understand Data pre-processing and processing.
- Create and use both employees and custodians.
- Perform Identification and Collection of electronic items for discovery.
- Manage Identification and Collections.
- Work with EV Search Preview and EV Holds.

Who Should Attend

This course is for customers, support engineers, consultants, and partners who need to maintain and use the Veritas eDiscovery Platform. The course is intended for the personnel responsible for maintaining the Veritas eDiscovery Platform infrastructure and performing identification and collection of data, typically an IT professional.

Prerequisites

Attend the **Veritas eDiscovery Platform 9: For Users** course. To get the most out of the training session, Veritas also strongly suggests that you have a basic understanding of electronic discovery and the Veritas eDiscovery Platform.

If you are new to electronic discovery or Veritas eDiscovery Platform, Veritas recommends the following options to facilitate a more effective experience:

- Review the following *Veritas eDiscovery Platform 9* documentation:
 - Case Administrator Guide
 - Distributed Architecture Guide
 - Utility Node Guide
 - Installation guide
 - Upgrade Overview
- (Optional) Have access to a Veritas eDiscovery Platform test environment.

Hands-On

This course includes practical hands-on exercises that enable you to test your new skills and begin to transfer them into your working environment.

COURSE OUTLINE

Overview and Installation

- Appliance Overview
- Architecture
- Service accounts
- Installation overview
- Patch notification and management
- Upgrading Veritas eDiscovery Platform

Configuration and System Maintenance

- Configuring System > Settings
- Configuring additional System parameters
- Performing backups
- Using the Clearwell Utility
- Veritas eDiscovery Platform Support

Labs:

- Exercise A: System settings and eDiscovery Platform UI
- Exercise B: Run a case backup
- Exercise C: Use the Clearwell Utility
- Exercise D: Upload logs for support

Case Creation

- Managing All Cases settings
- Configuring Classification
- Determining Processing > Settings

Labs:

- Exercise A: Modify the All Cases Settings
- Exercise B: Configure Classification
- Exercise C: Create a new Case
- Exercise D: Configure Processing Settings

Source Setup, Discovery and Processing

- Source Data Setup
- Discovery and Pre-Processing
- Pre-Processing Options
- Processing

Labs:

- Exercise A: Add case folder source
- Exercise B: Perform Discovery

- Exercise C: Perform Processing
- Exercise D: Batch Folders
- Exercise E: Use Load File Import (LFI)

Object Security

- Managing Users > Roles
- Configuring Access Groups
- Assigning Access Profiles
- Enabling Legal Hold Authentications

Labs:

- Exercise A: Create Roles
- Exercise B: Create Access Profile
- Exercise C: Create Access Groups

User and Custodian Setup and Management

- Configuring authentication options
- Managing user accounts
- Creating user accounts
- Managing Custodians

Labs:

- Exercise A: Create Users
- Exercise B: Test Roles
- Exercise C: Test Access Profiles
- Exercise D: Add users to Access Groups

Identification and Collection Fundamentals

- Identification and Collection: Overview
- Managing Sources and Locations

Labs:

- Exercise A: Perform Active Directory and Enterprise Vault discovery
- Exercise B: Create Source Accounts
- Exercise C: Create Sources
- Exercise D: Create Locations

Collections and Collection Tasks

- Configuring Collections
- Configuring Collection Tasks
- Managing Collection Tasks
- Performing Enterprise Vault search (EV Search Task)
- Managing EV Hold Tasks

Labs:

- Exercise A: Create Collection Tasks
- Exercise B: Filter Collection Tasks
- Exercise C: Assign Custodians
- Exercise D: Perform EV Search Preview
- Exercise E: Work with Enterprise Vault Hold in Place (EV Holds)

OnSite Collections and Collection Sets

- OnSite Collections: Overview and workflow
- Preparing and running OnSite Collector
- Creating and assigning Collection Sets

Labs:

- Exercise A: Create an OnSite Collection
- Exercise B: Create a Collection Set
- Exercise C: Evaluate Collection Set
- Exercise D: Add Collection Set to Case

Collection Reporting and Maintenance

- Collections reporting
- Managing Collections

Labs:

- Exercise A: Exporting Collection Reports
- Exercise B: Basic Troubleshooting