



COURSE DESCRIPTION

The *Veritas eDiscovery Platform 9: For Users* course is designed for legal professionals that perform Electronic Discovery on Electronically Stored Information. The course is designed to be delivered over three (3) days. It concentrates on the Preservation, Analysis, and Production stages of the Electronic Discovery Reference Model (EDRM).

Delivery Method(s)

This course is available in the following delivery method(s):

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

Duration

- Instructor-led training - ILT: 3 days, including 6 months of lab access
- Virtual instructor-led training - VILT: 3 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:

- Describe the basics of eDiscovery and the Electronic Discovery Reference Model (EDRM).
- Explain how data is discovered and collected.
- Describe early case assessment and data culling.
- Describe Veritas eDiscovery basic and advanced search capabilities.
- Setup and send Legal Hold Notices.
- Manage Legal Holds.
- Perform a variety of searches including information based on Classification.
- Organize data with tags and folders.
- Review setup and management.
- Perform redaction.
- Use the OCR (Optical Character Recognition) feature for documents containing imbedded text.
- Understand reporting and exception handling.
- Print, export, and produce documents in Veritas eDiscovery.
- (Optional) Describe the basics of Transparent Predictive Coding.

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 designed for the users of the Veritas eDiscovery Platform, such as; Attorneys or Paralegals who perform eDiscovery legal hold, searches and export or productions.

Prerequisites

There are no required prerequisites. To get the most out of the training session, however, Veritas 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 *Veritas eDiscovery Platform Reviewer QuickStart Guide*, and the *User Guide*: [Veritas eDiscovery Platform 9: Information and documentation](#)
- View online training and general information about electronic discovery at www.edrm.net.

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

Introduction to Electronic Discovery

- Electronic Discovery (eDiscovery)
- EDRM overview
- How data is discovered and collected

Introduction to Veritas eDiscovery

- Veritas eDiscovery Platform: Login and UI fundamentals
- Using All Cases and creating a new Case
- High-level workflows in Veritas eDiscovery Platform

Labs:

- Exercise A: View the various system settings and UI
- Exercise B: Veritas eDiscovery Platform Backups
- Exercise C: Working with Veritas eDiscovery Platform Support
- Exercise D: Modify the All Cases Settings
- Exercise E: Create a new Case

Legal Holds and Sending Hold Notices

- Legal Hold overview
- Creating and sending Legal Hold Notices

Labs:

- Exercise A: Create Legal Holds
- Exercise B: Send System Admin Notice
- Exercise C: Send Custodian Notice

Customizing Notices and Managing Confirmations

- Customizing Hold Notices
- Confirming notices

Labs:

- Exercise A: Customize Hold Notice Language
- Exercise B: Create survey question
- Exercise C: Respond to hold notices and surveys
- Exercise D: Create templates
- Exercise E: Customize reminders and escalations

Legal Hold Tracking and Management

- Legal Hold tracking and release
- Performing maintenance activities

Labs:

- Exercise A: Track Legal Holds
- Exercise B: Release Legal Holds
- Exercise C: Manage Legal Holds
- Exercise D: Review Legal Hold Reports

Tags and Folders

- Creating and managing Tags
- Managing Folders

Labs:

- Exercise A: Create folders
- Exercise B: Create tag lists
- Exercise C: Use tag variations

Document List, Filters and Analytics

- Viewing Documents
- Using Filters
- Using analysis tools

Labs:

- Exercise A: Perform basic searches
- Exercise B: Tag and Folder search results
- Exercise C: View discussion threads
- Exercise D: Filter data

Advanced Searching

- Search overview
- Using Advanced Search
- Searching by keywords
- Performing a Freeform search
- Searching media and images

Labs:

- Exercise A: Perform Advanced Searches
- Exercise B: Create search reports
- Exercise C: Create and manage saved searches
- Exercise D: Perform OCR job

Review Mode and Review Management

- Using Review Mode
- Managing review using Automation Rules
- Annotating and redacting documents
- Performing Review Management

Labs:

- Exercise A: Perform document cache and hit highlighting
- Exercise B: Review and tag documents
- Exercise C: Redact documents
- Exercise D: Generate reports from the dashboard
- Exercise E: Manage review using automation rules

Exporting Data – Native and Metadata Export

- Printing
- Export workflow
- Performing a Native Only export
- Running a Metadata export

Labs:

- Exercise A: Tag documents for export
- Exercise B: Run a Native Only export
- Exercise C: Run a Metadata export

Creating and Exporting Productions

- Production definition and workflow
- Creating Productions
- Exporting Productions
- Configuring Slip Sheets

Labs:

- Exercise A: Plan for a production
- Exercise B: Run production
- Exercise C: Export production

Appendix A: Transparent Predictive Coding Survey