

Veritas eDiscovery Platform 9: For Administrators

Course Summary

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.

Objectives

By the end of this course, students 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.

Topics

- Overview and Installation
- Configuration and System Maintenance
- Case Creation
- Source Setup, Discovery and Processing
- Object Security
- User and Custodian Setup and Management
- Identification and Collection Fundamentals
- Collections and Collection Tasks
- OnSite Collections and Collection Sets
- Collection Reporting and Maintenance

Audience

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

Before taking this course, you should 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, and the Upgrade Overview.
- (Optional) Have access to a Veritas eDiscovery Platform test environment.

Duration

Two days

Veritas eDiscovery Platform 9: For Administrators

I. Overview and Installation

- A. Appliance Overview
- B. Architecture
- C. Service accounts
- D. Installation overview
- E. Patch notification and management
- F. Upgrading Veritas eDiscovery Platform

II. Configuration and System Maintenance

- A. Configuring System > Settings
- B. Configuring additional System parameters
- C. Performing backups
- D. Using the Clearwell Utility
- E. Veritas eDiscovery Platform Support

III. Case Creation

- A. Managing All Cases settings
- B. Configuring Classification
- C. Determining Processing > Settings

IV. Source Setup, Discovery and Processing

- A. Source Data Setup
- B. Discovery and Pre- Processing
- C. Pre- Processing Options
- D. Processing

V. Object Security

- A. Managing Users > Roles
- B. Configuring Access Groups
- C. Assigning Access Profiles
- D. Enabling Legal Hold Authentications

VI. User and Custodian Setup and Management

- A. Configuring authentication options
- B. Managing user accounts
- C. Creating user accounts
- D. Managing Custodians

VII. Identification and Collection Fundamentals

- A. Identification and Collection: Overview
- B. Managing Sources and Locations

VIII. Collections and Collection Tasks

- A. Configuring Collections
- B. Configuring Collection Tasks
- C. Managing Collection Tasks
- D. Performing Enterprise Vault search (EV Search Task)
- E. Managing EV Hold Tasks

IX. OnSite Collections and Collection Sets

- A. OnSite Collections: Overview and workflow
- B. Preparing and running OnSite Collector
- C. Creating and assigning Collection Sets

X. Collection Reporting and Maintenance

- A. Collections reporting
- B. Managing Collections