

Symantec eDiscovery Platform 8.x: For Administrators

COURSE DESCRIPTION

The *Symantec eDiscovery Platform 8.x: 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 Symantec eDiscovery application. This class covers the major functionalities of the Symantec eDiscovery Platform as well as best practices for managing eDiscovery projects using Symantec eDiscovery Platform. It includes treatment of processing, search techniques, workflow management, export guidelines, and so on.

Delivery Method

Instructor-led (ILT), Virtual Academy (VA)

Duration

2 days

Course Objectives

After completing 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 Enterprise Vault Search Preview and Hold in Place.

Who Should Attend

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

Prerequisites

Attend the ***Symantec eDiscovery Platform 8.x: For Users*** course. To get the most out of the training session, Symantec also strongly suggests that you have a basic understanding of electronic discovery and the Symantec eDiscovery Platform. If you are new to electronic discovery or Symantec eDiscovery Platform, Symantec recommends the following options to facilitate a more effective experience:

- Watch the EV and Clearwell on-demand video demos found at:

[Enterprise Vault and eDiscovery Platform Tech Center](#)

- Review the following documents found at:
[Symantec eDiscovery Platform 8 documentation](#)
 - The Case Administrator Guide,
 - Distributed Architecture Guide.
 - Utility Node Guide
 - Installation guide
 - Upgrade Overview
- Set up a Clearwell test environment (if possible)

Hands-On

This course includes practical hands-on exercises that enable you to test your new skills and begin to use those skills in a working environment.

COURSE OUTLINE

EA 1: Symantec eDiscovery Platform Fundamentals 1

- Symantec eDiscovery Architecture: basic and distributed
- Symantec eDiscovery Service Accounts
- Symantec eDiscovery appliance overview
- Symantec eDiscovery application installation overview
- Patch Notification and Management
- Upgrading Symantec eDiscovery



EA 2: Symantec eDiscovery Platform Fundamentals 2

- System settings and tasks
- Setting up the Legal Hold Web Server
- Backups
- Symantec eDiscovery Utility
- Symantec eDiscovery Support
- **Hands-on labs:**
 - System settings and user interface
 - Run a case backup.
 - Use the Symantec eDiscovery Utility.
 - Upload logs for support.

EA 3: Source Setup and Case Creation

- Source Setup
- All cases settings
- Processing settings
- **Hands-on labs:**
 - Add Case Folder Source.
 - Modify the All Cases Settings.
 - Configure Processing Settings.

EA 4: Discovery and Processing

- Discovery (pre-processing)
- Pre-processing options
- Processing
- **Hands-on labs:**
 - Perform Discovery.
 - Perform Processing.
 - Batch Folders
 - Perform Load File Import

EA 5: Object Security

- User Roles
- User Access Profiles
- User Access Groups
- **Hands-on labs:**
 - Create Roles
 - Create Access Profiles
 - Create Access Groups

EA 6: User and Custodian Setup and Management

- User management
- Creating a new user
- Custodian Manager
- **Hands-on labs:**
 - Create Users
 - Use Custodian Manager

EA 7: Identification and Collection Fundamentals

- Overview of identification and collection
- Source and Active Directory discovery
- **Hands-on labs:**
 - Perform Active Directory discovery
 - Create Source Accounts
 - Create Sources
 - Create Destinations

EA 8: Collections and Collection Tasks

- Creating collections
- Filtering data and assigning custodians
- Managing Collection Tasks
- Enterprise Vault Search Preview
- Data Hold-In-Place in Enterprise Vault
- **Hands-on labs:**
 - Create Collection Tasks
 - Filter Collections
 - Assign custodians
 - Perform Enterprise Vault Search
 - Perform Data Hold-In-Place for Enterprise Vault

EA 9: OnSite Collections and Collection Sets

- OnSite collections overview and workflow
- Preparing and running OnSite Collector
- Creating collection sets and adding to case
- **Hands-on labs:**
 - Create an OnSite Collection
 - Create a Collection Set
 - Evaluate Collection Set
 - Add Collection Set to Case

EA 10: Collection Reporting and Maintenance

- Collection reporting capabilities
- IC backup, user roles, licensing
- **Hands-on labs:**
 - Export Collection Report
 - Basic troubleshooting