Symantec eDiscovery Platform 8.0: For Users

COURSE DESCRIPTION

The *Symantec eDiscovery Platform 8.0: 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
Instructor-led (ILT), Virtual Academy (VA)

Duration
3 days

Course Objectives
After completing 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 Symantec eDiscovery basic and advanced search capabilities.
- Setup and send Legal Hold Notices.
- Manage Legal Holds.
- Perform a variety of searches.
- 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 Symantec eDiscovery.
- 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 Symantec eDiscovery Platform. The course is designed for the users of the Symantec 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, Symantec 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:

- Review the Symantec eDiscovery Platform Reviewer QuickStart Guide, and the User Guide.

Symantec eDiscovery Platform 8 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 use those skills in a working environment.

COURSE OUTLINE

1: Introduction to Electronic Discovery
- Electronic Discovery (eDiscovery)
- EDRM overview
- How data is discovered and collected

2: Introduction to Symantec eDiscovery
- Symantec eDiscovery appliance overview
- Symantec eDiscovery Login and UI fundamentals
- All Cases area and create new cases
- High-level workflows with Symantec eDiscovery
- **Hands-on labs:**
    - Log into Symantec eDiscovery
    - Navigate the User Interface
    - Create a new case

3: Legal Holds and Sending Hold Notices
- Overview of legal hold
- Creating and sending hold notices
- **Hands-on labs:**
    - Create Legal Holds
    - Send System Admin Notice
- Send Custodian Notice

4: Customizing Notices and Managing Confirmations
- Customizing notice language and surveys
- Managing custodian confirmations
- **Hands-on labs:**
    - Customize Hold Notice Language
    - Create survey questions
    - Respond to hold notices and surveys
    - Create templates
    - Customize reminders and escalations

5: Legal Hold Tracking and Management
- Legal hold tracking and release
- Setup and maintenance activities
- **Hands-on labs:**
    - Track Legal Holds
    - Release Legal Holds
    - Manage Legal Holds

6: Tags and Folders
- Tags
- Folders
- Bulk operations
- **Hands-on labs:**
    - Create and assign folders and batch folders.
    - Create tag lists.
    - Use tag variations
    - Perform bulk operations

7: Document List, Filters and Analytics
- Document List page
- Search filters
- Analysis tools
- **Hands-on labs:**
    - Perform basic searches
    - View discussion threads
    - Filter data

8: Advanced Searching
- Advanced search
- Keyword search
- Saved search
- Concept search
- Audio Search
- **Hands-on labs:**
    - Perform advanced searches
    - Create and manage saved searches
    - Create search reports
    - Perform concept searches (optional)

9: Review Mode and Review Management
- Review mode
- Redaction
- Review management
- **Hands-on labs:**
    - Review and tag documents
    - Redact documents
    - Generate reports from the review dashboard

10: Exporting Data: Native Only and Metadata Exports
- Printing
- Export workflow
- Native Only export
- Metadata export
- **Hands-on labs:**
    - Tag documents for export
    - Run a Native Only export
    - Run a Metadata export

11: Creating and Exporting Productions
- Production definition and workflow
- Creating productions
- Exporting productions
- **Hands-on labs:**
    - Plan for a production
    - Run production
    - Export production

12: Transparent Predictive Coding Survey (Optional)
- Basics of Transparent Predictive Coding
- **Hands-on labs:**
    - Perform Transparent Predictive Coding