



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 \(VILT\)](#)

Duration

3 days

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

Legal Holds and Sending Hold Notices

- Legal Hold overview
- Creating and sending Legal Hold Notices

Customizing Notices and Managing Confirmations

- Customizing Hold Notices
- Confirming notices

Legal Hold Tracking and Management

- Legal Hold tracking and release
- Performing maintenance activities

Tags and Folders

- Creating and managing Tags
- Managing Folders

Document List, Filters and Analytics

- Viewing Documents
- Using Filters
- Using analysis tools

Advanced Searching

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

Review Mode and Review Management

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

Exporting Data – Native and Metadata Export

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

Creating and Exporting Productions

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

Appendix A: Transparent Predictive Coding Survey