

Symantec Clearwell eDiscovery Platform 7.x: Administration

COURSE DESCRIPTION

The *Symantec Clearwell eDiscovery Platform 7.x: Administration* course is designed for the network, IT security, systems administration, and support professional tasked with configuring, and maintaining a Clearwell environment. This class covers the major functionalities of the Clearwell eDiscovery Platform as well as best practices for managing eDiscovery projects in Clearwell including processing, search techniques, workflow management, export guidelines, and so on. This class is composed of three sub-courses: Legal Hold and Collection, Processing, Review and Export and a third sub-course, Symantec Clearwell eDiscovery Platform 7.1.3: Differences, covering the changes implemented for Symantec Clearwell eDiscovery Platform in v.7.1.3.

Delivery Method

Instructor-led (ILT)

Duration

Five days

Course Objectives

After completing this course, you will be able to:

- Setup and send Legal Hold Notices.
- Manage Legal Holds.
- Perform Identification and Collection of electronic items for discovery.
- Manage Identification and Collections.
- Work with Enterprise Vault Hold in Place.
- Setup and configure the system.
- Create and setup Cases.
- Understand Data pre-processing and processing.
- Perform Load File Import (LFI).
- Understand early Case assessments and data culling.
- Describe Clearwell Advanced Search capabilities.
- Describe the basics of Transparent Predictive Coding.
- Review setup and management.
- Understand reporting and exception handling.
- Print, export, and produce documents in Clearwell.

Who Should Attend

This course is for customers, support engineers, consultants, and partners who need to maintain and use the Symantec Clearwell eDiscovery Platform.

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 Clearwell eDiscovery Platform. If you are new to electronic discovery or Clearwell, Symantec recommends the following options to facilitate a more effective experience:

- View a Flash Demo as well as read about Clearwell at www.clearwellsystems.com.
- Contact your Symantec representative to arrange a short demonstration.
- Review the Clearwell Reviewer QuickStart Guide, Case Administrator Guide, or other Clearwell reference materials (contact your Symantec representative or Training Services contact for copies).
- 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

Legal Hold and Collection (LHC)

Lesson 1: Introduction to Clearwell

- Legal Discovery and EDRM overview
- Clearwell appliance overview
- Clearwell application installation overview
- Clearwell Login and UI fundamentals
- High-level workflows with Clearwell

Lesson 2: Legal Hold and Hold Notices

- Overview of legal hold
- Importing and managing custodians
- Creating and sending hold notices
- **Hands-on labs:**
 - Create Legal Holds
 - Send System Admin Notice
 - Send Custodian Notice

Lesson 3: 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

Lesson 4: Legal Hold Management and Tracking

- Legal hold tracking and release



- Setup and maintenance activities
- **Hands-on labs:**
 - Track Legal Holds
 - Release Legal Holds
 - Manage Legal Holds
 - Review Legal Hold Reports

Lesson 5: Identification and Collection Fundamentals

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

Lesson 6: Collections and Collection Tasks

- Creating collections
- Filtering data and assigning custodians
- Enterprise Vault Hold-in-Place (EV Holds)
- **Hands-on labs:**
 - Create Collection Tasks
 - Filter Collections
 - Assign custodians
 - Create, schedule, view statistics and release EV Hold in Place

Lesson 7: 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

Lesson 8: Collection Reporting and Maintenance

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

Processing, Review and Export (PRE)

Lesson 1: Introduction to Clearwell

- Legal discovery and EDRM overview
- Clearwell appliance overview
- Clearwell application installation overview
- Clearwell login and UI fundamentals
- High-level workflows with Clearwell

Lesson 2: Clearwell System Settings

- Clearwell Architecture
- System settings and tasks

- Backups
- Clearwell Utility and services
- Clearwell Support
- **Hands-on labs:**
 - System settings and Clearwell user interface
 - Run a case backup
 - Use the Clearwell Utility
 - Upload logs for support

Lesson 3: Case Creation and Management

- Source Setup
- All cases area
- Creating a new case
- Processing settings
- **Hands-on labs:**
 - Modify the All Cases Settings
 - Create a new Case
 - Configure Processing Settings

Lesson 4: Source Setup, Discovery and Processing

- Discovery (pre-processing)
- Pre-processing options
- Processing
- **Hands-on labs:**
 - Add Case Folder Source
 - Perform Discovery
 - Perform Processing
 - Perform Load File Import (LFI)

Lesson 5: Document List, Filters and Analytics

- Document List page
- Search filters
- Analysis tools
- **Hands-on labs:**
 - Perform basic searches
 - View discussion threads
 - Filter data
 - Perform an OCR job

Lesson 6: Advanced Search and Predictive Coding

- Advanced search
- Keyword search
- Transparent Predictive Coding
- Concept search
- Saved search
- **Hands-on labs:**
 - Perform advanced searches
 - Use Transparent Predictive Coding
 - Create search reports
 - Create and manage saved searches
 - Perform concept searches (optional)

Lesson 7: Tags and Folders

- Tags
- Folders
- Bulk tag operations
- **Hands-on labs:**



- Create and assign folders and batch folders.
- Create tag lists.
- Use tag variations
- Separate Tagging of Attachments (STOA)
- Perform bulk tagging (SmartTag)

Lesson 8: User Setup and Management

- User management
- Creating a new user
- User Access Profiles
- **Hands-on labs:**
 - Create Users
 - Create Access Profiles

Lesson 9: Review Mode and Review Management

- Review mode
- Redaction
- Review management
- **Hands-on labs:**
 - Review and tag documents
 - Redact documents
 - Perform document cache and hit highlighting.
 - Generate reports from the review dashboard

Lesson 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

Lesson 11: Creating and Exporting Productions

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

Lesson 12: Clearwell Review

- Review of case workflow and key functionality
- **Hands-on labs:**
 - Perform a hypothetical eDiscovery case from start to finish.

Symantec Clearwell eDiscovery Platform 7.1.3: Differences

Lesson 1: Custodian Manager

- Functionality
- Workflow
- New Jobs
- Feature Summary
- Basic Troubleshooting

Lesson 2: Enterprise Vault (EV) Search Preview

- Purpose
- Enterprise Vault (EV) Search Tasks
- Analytics
- Preview
- Basic Troubleshooting

Lesson 3: Installer Improvements

- Installer Improvements

Lesson 4: Upgrade considerations

- Upgrade considerations
- 3rd party upgrades

Lesson 5: Processing

- Improved Container Handling
- Strong File Typing Based Processing
- Configure Crawler Properties at Case
- Processing Improvements
- Distributed Architecture UI Enhancements
- LFI Improvement
- Processing Reports

Lesson 6: Enterprise Vault Integration, Case Matter Management Fields and Telemetry

- Enterprise Vault (EV) Blind Carbon Copy (BCC) and Distribution List (DL) support
- Native View/Exports and Prints
- Adding Case Matter Management Fields
- Telemetry

Lesson 7: Search, Review and Search Reports

- Search Report
- Search Hit Report
- Separate Tagging of Attachments (STOA) Fix
- E-mail Header Search
- Project C
- Predictive Coding Graphs
- Disable Find Similar

Lesson 8: Exports and Productions

- Image Remediation
- Exports