

Symantec Clearwell eDiscovery Platform 7.x: Processing, Review and Export

COURSE DESCRIPTION

The *Symantec Clearwell eDiscovery Platform 7.x: Processing, Review and Export* course is designed for the network, IT security, systems administrator, and support professional tasked with configuring Clearwell and managing cases in Clearwell. This course covers the major functionality of the Clearwell eDiscovery Platform as well as best practices for managing eDiscovery projects. Main course topics include system management, case setup, processing, search, review, and export.

Delivery Method

Instructor-led (ILT)

Duration

Three days

Course Objectives

After completing this course, you will be able to:

- Set up 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

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