

Legal Discovery Using Veritas Enterprise Vault 12.2 Discovery Accelerator

Course Summary

Description

This course is designed for those who use Discovery Accelerator to search, review, and prepare archived items in support of information requests. This class describes the steps involved in setting up discovery searches and explains how to review, analyze, and export the search results. In addition, using research folders and setting up marks and tags are discussed. Also included are analytics and client review. NOTE: Installation, configuration, and troubleshooting of Discovery Accelerator are not covered.

Objectives

By the end of this course, you will be able to:

- Define how discovery Accelerator is used to meet a company's search demands.
- Set up research folders to perform proactive investigation.
- Use marks to indicate the status of an item.
- Use tags to pose a question in a case.
- Search, review, export, and produce requested items.
- Search and review items tagged with the Enterprise Vault Classification engine.
- Enable and use Analytics, Automatic Categorization, and Conversation View.
- Schedule and run Discovery Accelerator reports.

Topics

- Introduction to Electronic Discovery
- Sources of Archived Electronic Data
- Custodian and Target Management
- Research Folders and Cases
- Marks and Tags
- Searches
- Analytics and Auto Categorization
- Assigning Items to Reviewers
- Manual Review
- Exporting and Producing Data
- Reporting
- Advanced Topics

Audience

This course is for Discovery Accelerator users and other individuals who use Enterprise Vault Discovery Accelerator to retrieve requested business information.

Prerequisites

Students should have working knowledge of using a Windows system such as Windows 7, 8 or 10.

Duration

Three days

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Course Outline

- I. *Introduction to Electronic Discovery*
 - A. Electronic Discovery
 - B. Introduction to Discovery Accelerator
 - C. Starting and Navigating the Discovery Accelerator Client
 - D. Setting up Roles
 - E. Case Study: Using Discovery Accelerator
- II. *Sources of Archived Electronic Data*
 - A. Records Management
 - B. Data Archiving Overview
 - C. Mailbox Archiving
 - D. Journaling Archiving
 - E. PST Archiving
 - F. File System and SharePoint Archiving
- III. *Custodian and Target Management*
 - A. Overview of Custodian Manager
 - B. Accessing the Custodian Manager
 - C. Adding an Active Directory Domain
 - D. Viewing and Modifying a Custodian
 - E. Viewing Custodian Groups
 - F. Setting Up Targets and Target Groups
- IV. *Research Folders and Cases*
 - A. Introduction to Research Folders
 - B. Creating Research Folders
 - C. Research Folder Functionality
 - D. Setting Up Cases
- V. *Marks and Tags*
 - A. Using Marks
 - B. Tags and Tag Groups
- VI. *Searches*
 - A. Performing Searches
 - B. Accepting Searches
- C. Search Schedules
- VII. *Analytics and Auto Categorization*
 - A. Analytics Overview
 - B. Configuring Analytics
 - C. Introduction to Automatic Classification
- VIII. *Assigning Items to Reviewers*
 - A. Manual Review Overview
 - B. Assigning Items to Reviewers
 - C. Faceted Filtering
 - D. Search within a Search
- IX. *Manual Review*
 - A. Review Process
 - B. Using the Similar / Duplicate Option
 - C. Copying Items to a Research Folder
 - D. Customizing the Reviewing Screen
 - E. Conversation View
- X. *Exporting and Producing Data*
 - A. Exporting and Producing Data
 - B. Export Using Duplicate or Similar
 - C. Best Practices
- XI. *Reporting*
 - A. Discovery Accelerator Chain of Custody Reports
 - B. Running a Discovery Accelerator Report
 - C. Exporting Reports
- XII. *Advanced Topics*
 - A. Creating a New Customer
 - B. Discovery Accelerator Advanced Settings
 - C. Overview of Prefetch Cache
 - D. Configuring Search Settings
 - E. Adding a Custom Search Attribute