

---

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

**Duration: 3 Days    Course Code: HA0430**

---

### Overview:

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.

---

### Target Audience:

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

---

### Objectives:

- |   |   |
|---|---|
| ■ <b>After completing this course, you will be able to:</b> | ■ Describe Clearwell Advanced Search capabilities.      |
| ■ Set up and configure the system.                          | ■ Describe the basics of Transparent Predictive Coding. |
| ■ Create and setup cases.                                   | ■ Review setup and management.                          |
| ■ Understand data pre-processing and processing.            | ■ Understand reporting and exception handling.          |
| ■ Perform Load File Import (LFI).                           | ■ Print, export, and produce documents in Clearwell.    |
| ■ Understand early case assessments and data culling.       |   |
- 

### 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](http://www.clearwellsystems.com).
  - Contact your Symantec representative to arrange a short demonstration.
-

## Content:

### 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

## Further Information:

For More information, or to book your course, please call us on 00 20 (0) 2 2269 1982 or 16142

[training@globalknowledge.com.eg](mailto:training@globalknowledge.com.eg)

[www.globalknowledge.com.eg](http://www.globalknowledge.com.eg)

Global Knowledge, 16 Moustafa Refaat St. Block 1137, Sheraton Buildings, Heliopolis, Cairo