Symantec™ eDiscovery Platform, powered by Clearwell

The Symantec™ eDiscovery Platform, powered by Clearwell brings transparency and control to the electronic discovery process. From collection to production, our workflow speeds time to resolution, improves accuracy, and lowers costs. With better insight and less complexity, the eDiscovery Platform enables the enterprise, governments, and law firms to focus on strategy and create business value.

The eDiscovery Platform can be deployed as a single unified platform or in modules, based on your organization's electronic discovery requirements. The easy-to-administer physical appliance is available for in-house implementation or as a managed service from an authorized service provider.

Legal Hold Module—Automate the legal hold process using a repeatable and defensible workflow that satisfies the duty to preserve.

Identification & Collection Module—Simplify the forensic identification and collection of ESI from all critical data sources.

Processing & Analysis Module—Automatically cull early case assessment data by up to 90 percent using rapid processing and defensible analysis.

Review & Production Module—Reduce review costs by up to 98 percent with Transparent Predictive Coding for a faster review time, improved accuracy, and flexible options to produce data.

Archiving and eDiscovery

With Symantec Enterprise Vault™ and the eDiscovery Platform, Symantec delivers the first fully integrated electronic discovery and archiving solution. Legal and investigative teams now have a single, seamless interface to search and collect data, place holds within the archive, and perform analysis and review. Both Enterprise Vault and the eDiscovery Platform have achieved Gartner Magic Quadrant Leader status year after year. Over half the Fortune 100 and more than 16,000 organizations rely on Symantec Archiving and eDiscovery for faster resolution at a lower cost.
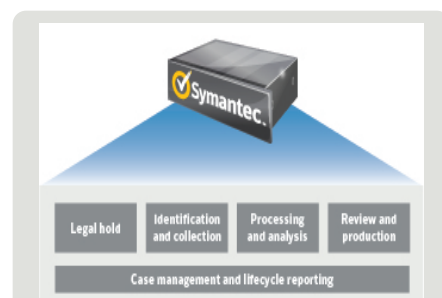
Legal Hold

Hold notices—Quickly create hold notices and email them to custodians and system administrators. Customize the included templates or import your own.

Reminders and escalations—Create and schedule reminders to non-responsive custodians and escalates reminders to a custodian's manager if necessary for compliance.

Custodian survey—Create and issue survey questions to key custodians to easily capture information critical to a case.

Survey response report—Automatically compiles survey responses for analysis in a summarized format and by individual custodian.

Key benefits
- *Bring transparency and control to the entire electronic discovery process from legal hold and collection through production with a single platform and reduce costs.*
- *Execute complex, iterative electronic discovery processes that reflect real world scenarios with the highest level of defensibility.*
- *Empower users to be productive immediately through an intuitive, Web-based platform that is easy to use and administer.*

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Custodian portal—Single view access to summary details of active, pending, and released holds.

Automated tracking and reporting—Review the status of all legal hold notices for one case or across all cases in a single view.
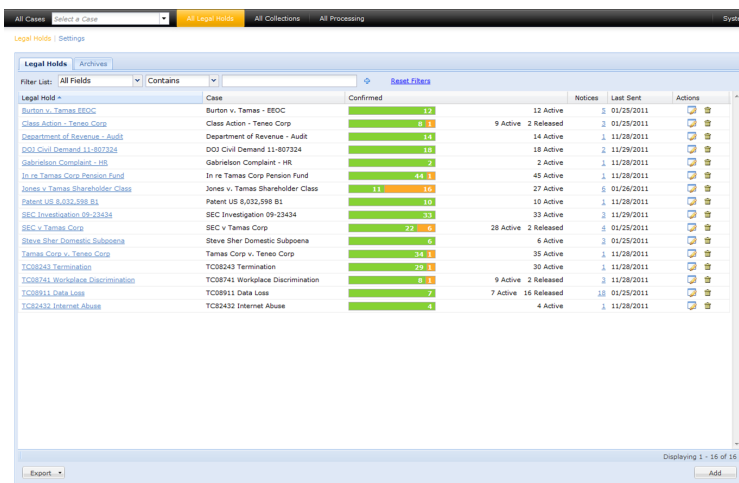

Figure 1. Automated tracking and reporting: View the status of all legal hold notices across all cases in a single view.

Identification and Collection

Interactive data map—Search and browse an interactive catalog of data sources and custodians.

Network collector—Collect remotely from 50+ data source types over the network.

On-site collector—Collect securely on-site from laptops, PCs, and files shares onto any standard USB drive or file share.

Metadata filters—Targeted collections with metadata filtering based on owner/author, date range, and file type. Specify criteria via a point-and-click interface, without scripting or programming.

Keyword filters—Filter collections by keywords and leverage existing source indices to utilize federated search-enabled keyword collections from data sources behind the firewall or in the cloud.

Symantec Enterprise Vault™ direct collector—Collect from Enterprise Vault at scale using the only direct collector certified by Symantec and the collection management console.

Enterprise Vault collection filters—Target collections from Enterprise Vault using metadata and keyword filters based on existing index and Data Classification Services tags.

Preserve in Enterprise Vault—Preserve information in the controlled environment of the Enterprise Vault archive and reduce risk.

Extended Microsoft SharePoint® collections—Collect all SharePoint document types including blogs, wikis, calendar items, announcements, discussions, and surveys and render them in context.

Figure 2. Collection analytics: Provide a complete portfolio of analytical charts and tables that offer real-time visibility into the status of the collection.

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Collection scheduler—Schedule network collections to run at a particular time and date to better manage server resources.

Data verification—Automatically verify the integrity of collected data before and after collection, ensuring each collection is forensically sound.

Collection management console—Centralizes all collection information into a single view, including file volumes, custodians, and detailed data sources.

Collection analytics—Provides a complete portfolio of charts and tables for real-time visibility into the status of the collection.

Processing

Advanced pre-processing filters—Filter data by custodian, date, strong file type, and file size prior to processing.

Pre-processing analytics—Review a visual summary of document set characteristics and detailed analysis by custodian, timeline, and file type.
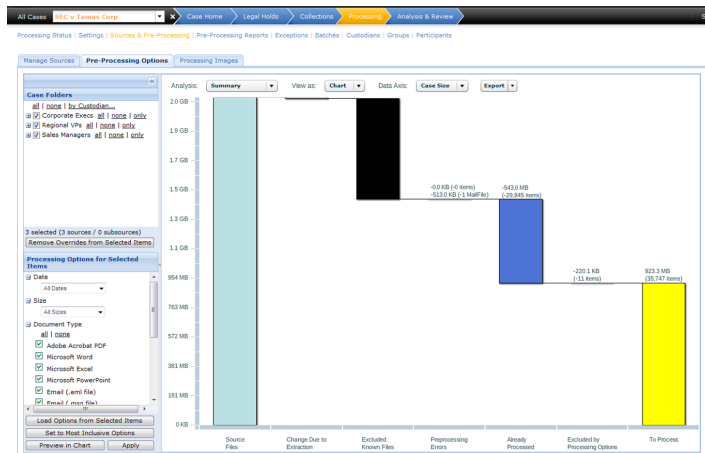

Figure 3. Pre-processing analytics: Graphically depict data volume, file types, and time frames of collected data prior to processing.

Rapid processing—Process and analyze documents at up to 1 TB per day using our high-performance architecture.

Robust file support—Process and analyze over 400 different file types, including images with text using Optical Character Recognition (OCR).

Intelligent deduplication—Automatically deduplicates data across multiple data stores and across the entire data set.

Multi-language support—Enables automatic language identification of documents with full Unicode compliance.

Search and Analysis

Transparent keyword search—Enables a more defensible and collaborative electronic discovery search process and enhances the ability to cull irrelevant information.

- **Keyword search preview**—Search relevant or exclude false positive variations prior to running search by previewing matching keyword variations.
- **Keyword search filters**—Filter search results in real-time for individual queries or variations and sample filtered documents.
- **Keyword search report**—Documents all search criteria and provides detailed analytics of the results.

Transparent concept search—Delivers a unique set of features that enable an interactive, relevant, and defensible search process.

- **Concept search preview**—Refine searches by previewing and selecting relevant terms before running a search.
- **Concept search explorer**—Provides a visual interface to dynamically explore and discover new relevant concepts.
- **Concept search report**—Provides detailed analytics of search results including documentation of the related terms included in each concept search.
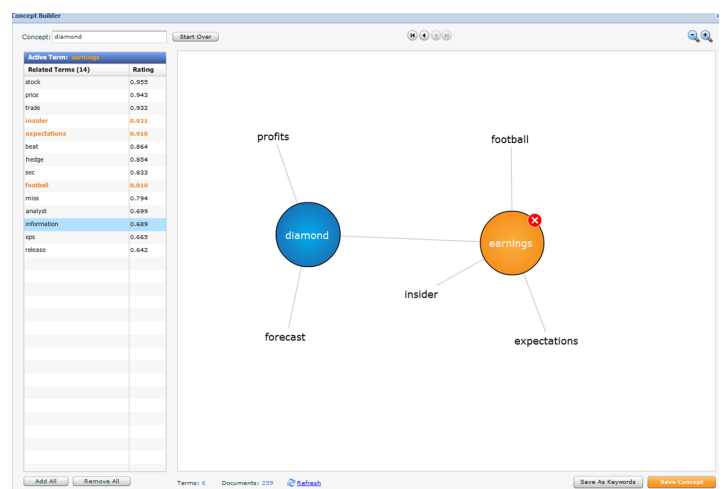

Figure 4. Concept search explorer: Provides a visual interface to dynamically explore and discover new relevant concepts.

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Multi-keyword search—Run up to 100 searches simultaneously and review reports to test search effectiveness.

Advanced search—Construct advanced searches for multiple fields using Boolean, stemming, wildcard, fuzzy, and proximity searches.

Auto-filters—Narrow search results using clickable filters with the exact document counts.

Discussion threads—Thread related messages chronologically to capture entire discussions, including all replies, forwards, and carbon copies.

Topic classification—Automatically organize documents into specific topics to quickly analyze all documents related to a particular subject.

People analytics—Monitor and list the frequency of communications between key custodians.

Term analytics—Leverage natural language algorithms to uncover secret project names and code words that may be relevant to a case.
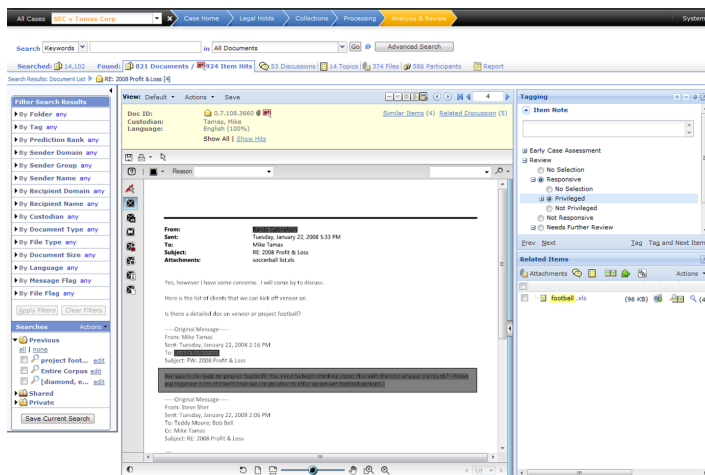

Figure 5. Near-native viewer: Access documents, attachments, and email threads in near-native formats for review, tagging, and redaction.

Review

Near-native viewer—Displays documents in a near-native format without the application present on a reviewer's workstation.

Persistent hit highlighting—Highlights search terms in messages, attachments, and files within the viewer.

Redaction—Protects privileged, work product, and privacy information with reason codes and redaction verification.

Auto-redaction—Automatically redacts keywords, phrases, and personal information, such as Social Security numbers.

Transparent predictive coding—Leverages the intelligence of expert reviewers to generate tagging criteria, automatically generate predictions, and analyze accuracy for rapid review.

- **Initial training set analytics**—Offers sophisticated analytics by criteria such as custodian, discussion, concept, and participant to ensure the selection of a highly relevant initial training set. By focusing the initial training set on documents relevant to training, reviewers benefit from improved prediction accuracy.

- **Directed training**—Uses patent-pending active learning technology to automatically determine each subsequent training set after the initial training set, selecting documents for training which result in the highest improvement in prediction accuracy. Optimized training sets minimize the number of documents requiring manual review, further reducing cost.

- **Prediction insight**—Automatically provides a prediction score for the document under review, displaying content and metadata relevant to the prediction. Users can quickly assess how the prediction was generated to improve prediction accuracy and make consistent review decisions, bolstering defensibility.

- **Review quality control**—Provides a set of built-in quality control capabilities allowing users to measure review accuracy, identify inconsistent tagging, highlight disagreements between reviewers, and automatically compare predictions and human decisions to assess and improve review accuracy.

- **Advanced sampling**—Provides intuitive statistical sampling tools to select an appropriate random sample based on the accuracy requirements of the case. Sample size is automatically adjusted for case factors that affect

sampling accuracy, taking the guesswork out of statistical sampling.

- **Prediction templates**—Enable users to streamline the review of cross-matter issues by using templates to import and export prediction models across cases, resulting in reduced cost and risk.

Near-duplicate identification—Identifies and displays near-duplicates, and automatically compares documents.

Find similar—Groups emails, attachments, and loose files with similar content to the document under review.

Related documents—Identifies and displays related documents, such as near-duplicates, similar documents, and those contained in discussion threads and attachments.

Decision-tree tagging—Tags individual or sets of documents using a customizable multi-layer tree structure.

Auto-batching—Automatically allocates documents into review folders based on either a set number of folders or a set number of documents per folder.

Review folder management—Monitors the completion of review sets and provides the status of review folders that are currently checked in or out by any reviewer.

Review workflow template—Provides customizable tag and folder templates that encapsulate best practices from enterprises, governments, and law firms.

Auto-resume—Enables users to resume review or analysis with the exact document and screen settings set prior to logging off.

Load file import—Provides the flexibility to import external load files from other review platforms into the eDiscovery Platform.

Review progress report—Automatically generates a graphical report of document review progress.

Reviewer productivity report—Shows the number of documents individual or groups of reviewers have tagged over a time period.

Review scalability—Add capacity on-demand to increase the number of concurrent reviewers.

Production

Native and image-based production—Produce documents in native, TIFF, PDF, and mixed mode formats.

Export and production management—Streamlines the export and production process by providing sharable export templates and pre-mediation of issues.

Bates Stamping—Applies sequential numbering of documents with Bates Stamps as well as custom headers and footers.

Document export—Export data in EDRM XML, DAT, and CSV formats, to increase interoperability and the seamless transfer of electronic data to outside parties.

Rolling production—Enables batch productions at any point in the eDiscovery process.

Load file configurator—Provides customizable load file creation during export, eliminating the need for custom transforms prior to ingestion into third-party review applications.

Export and production scalability—Add capacity on-demand to increase export and production performance.

Case Management and Reporting

Case analytics—Monitor case progress to better allocate resources and meet deadlines.

Lifecycle reporting—View integrated dashboards and reporting from legal hold through production.

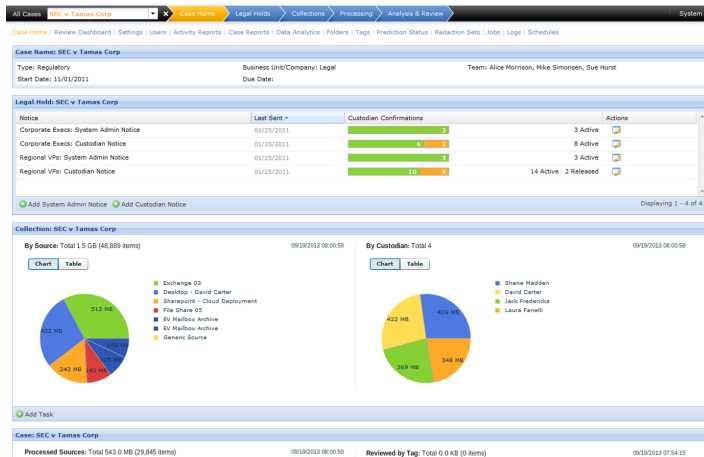Confidence in a connected world. ✓ **Symantec.**

Figure 6. Lifecycle reporting: Summarizes case status from collection through production in a single dashboard.

Multi-case architecture—Manage of 100s of cases and 1,000s of users with 64-bit, distributed, case-based architecture.

Case configuration—Create cases and manage groups, topics, review sets, and decision tree tag structures.

eDiscovery dashboard—Provides detailed analytics of all cases across an organization in an automatically generated graphical report.

Audit trail and activity reporting—Tracks user actions such as login, logout, search, tag, print, and export, providing a full, reproducible audit trail.

Deployment options

The eDiscovery Platform is a physical appliance available for in-house implementation or as a managed service from an authorized service provider.

More Information

Visit our website

www.symantec.com/ediscovery-platform

To speak with a Product Specialist in the U.S.

Call toll-free 1 (877) 727 9909

To speak with a Product Specialist outside the U.S.

For specific country offices and contact numbers, please visit our website.

About Symantec

Symantec is a global leader in providing security, storage, and systems management solutions to help consumers and organizations secure and manage their information-driven world. Our software and services protect against more risks at more points, more completely and efficiently, enabling confidence wherever information is used or stored. Headquartered in Mountain View, Calif., Symantec has operations in 40 countries. More information is available at www.symantec.com.

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