



This Fixed Price-Fixed Scope Service Description describes the **eDiscovery Platform Upgrade Service – In Place** (the “Service”). This Service Description is part of any Services Instrument that incorporates this Service Description by reference (collectively, the “Agreement”). “**Services Instrument**” means one or more of the following applicable documents which further defines Customer’s rights and obligation related to the Service: a Veritas certificate, or a written statement of work or similar document, between Customer and Veritas with associated terms and conditions, that references this Service Description.

Service Overview

This Service is a Fixed Price-Fixed Scope Service engagement to upgrade Customer’s eDiscovery Platform (“eDP”) from version 8.3 to the latest revision of 9.1 release. Veritas shall perform a health check of the existing environment so that the configuration is optimal for the Customer’s workflow. Veritas shall then upgrade the existing server to the latest 9.1 release (and patches).

Delivery Details

Scope of Service

Veritas shall perform the tasks using a phased approach:

Phase 1	Project Planning
Phase 2	Production eDP Health Check
Phase 3	Production eDP Upgrade
Phase 4	Project Review and Closeout

PHASE 1 PROJECT PLANNING

Veritas shall initiate a planning discussion with Customer to prepare for the project. The topics outlined below shall be discussed during the meeting:

- Review roles and responsibilities
- Confirm primary Customer point of contact
- Review Scope of Service
- Distribute the applicable pre-installation checklists to prepare the hardware for installation

PHASE 2 PRODUCTION eDP HEALTH CHECK

Veritas shall facilitate a WebEx with Customer to review the current workflow and configuration of eDP. The objectives of this meeting are to:



- Work with Customer team members to discuss the eDP environment, identify problem areas, and gather information on the Veritas environment
- Look for opportunities to leverage features/functionalities that would help alleviate issues or better help meet Customer's business requirements. Issues regarding tuning, performance, and scalability shall be analyzed with remediation steps as recommended, if applicable
- Perform a workflow review covering the following topics:
 - Review both major and minor phases of the eDiscovery workflow including:
 - Case strategy and oversight
 - Case initiation
 - Collection and preservation
 - Processing
 - Search and analysis
 - Review
 - Production and export
 - Case disposition
 - Identify special processes and adjustments to existing processes required to implement advised improvements
 - Departments: Human Resources, Compliance, etc. (per Customer's needs)
 - Identify alternative use cases workflows (if applicable)

PHASE 3 PRODUCTION eDP UPGRADE

The objective of this phase is to upgrade the eDP infrastructure within the production environment.

Production Environment Preparation:

Veritas shall work with Customer to install new production environment. Veritas shall:

- Participate in preparation meeting(s) with Customer infrastructure team, operations resources and business units
- Review any customizations performed to the environment that are not clearly documented
- Confirm readiness
- Validate all scheduled jobs are completed

Upgrade of eDP to version 9.1

Veritas shall assist Customer with the following activities:

- Upgrade of one (1) appliance/physical/virtual server to the latest 9.1 release
- Patching of any applicable service packs or hot fixes
- Acceptance testing of eDP post-upgrade

Post Upgrade Knowledge Transfer

Veritas shall assist Customer with the following activities:

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- Facilitate the delivery of a two (2) hour knowledge transfer and workflow review session with Customer (systems, application and case administrators) staff members focusing on new product functionality and staff member's respective requirements.

PHASE 4 PROJECT REVIEW AND CLOSEOUT

Veritas shall perform and/or provide the following:

- Review project activities
- Provide completed ATP document
- Participate in closeout meeting

Deliverables

Phase 1 Deliverable:

- Completion of pre-engagement activities

Phase 2 Deliverables:

- Perform a Health Check and workflow review of the environment
- Provide and review Health Check document with Customer

Phase 3 Deliverable:

- Upgrade one (1) eDP server from 8.3 or higher to the latest 9.1 release

Phase 4 Deliverable:

- Project Closeout

Key Dependencies & Customer Responsibilities

- All tasks shall be performed remotely from a Veritas facility. If Customer requires Veritas to perform the Service onsite, the parties will mutually agree on travel and expense fees
- Work is conducted during Normal Work Hours.
- Relevant software must be downloaded and staged on the target server
- Verify compatibility in the eDP Compatibility Matrix located at:
https://www.veritas.com/support/en_US/article.TECH211911
- Current eDP server needs to be running Windows 2008 R2, 2012, or 2012 R2
- Current eDP version must be 8.3 or higher

Customer Responsibilities. Veritas can only perform the Service if Customer provides required information or performs required actions. If Customer does not provide/perform per the following prerequisites, assumptions, or dependencies, Veritas' performance of the Service may be delayed, impaired or prevented:

- Prior to Veritas commencing Phase 1 of the Service, Customer shall Upgrade license keys via the my.veritas.com portal

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- During Phase 3 of the Service, Customer shall:
 - Ensure a Customer representative with access to the service and source account credentials shall be on hand to enter credentials when needed
 - Ensure that all change control/ end user notifications have been submitted
 - Perform a full node backup in order to establish recovery point after Veritas has validated the environment (see bullets in Phase 3) in the Veritas shall section
- Change Control Records shall be entered and maintained by Customer
- Veritas strongly recommends that the Customer back up all critical hosts in Customer's environment before Service commencement. Veritas does not accept responsibility or liability for any loss of data incurred by Customer during the delivery of this Service
- Provide the necessary staffing resources (e.g., LAN, SAN, OS Platforms, DBA, etc.) to enable the Service to be performed.
- Allocate any necessary space, power, cooling, networking, security measures, and wire/cable management for the Service.
- Provide any necessary network access for Veritas, SNMP and email address requirements for alert notifications, and open the necessary network ports to enable the Service to be performed.
- Provision a contiguous range of physical IP addresses and a contiguous range of virtual IP addresses. All IP addresses (both physical and virtual) must be part of the same subnet and use the same netmask as the node's access IP.
- Any additional Customer Responsibilities set forth in this Services Description and the Services Instrument.

Pricing Schedule

This Service is pre-paid, and payment is not contingent upon acceptance of any deliverable. Veritas shall invoice Customer or its Reseller in advance of delivery of Services.