Veritas eDiscovery Platform

Reviewer's QuickStart Guide

10.2

VERITAS

Veritas eDiscovery Platform™: Reviewer's QuickStart Guide

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Reviewer's QuickStart Guide

The Reviewer's QuickStart Guide provides case users and reviewers with an overview of the user interface and the major search and analysis features of Veritas eDiscovery Platform.

This section contains the following sections:

- *"About This Guide" in the next section*
- *"Revision History" on page 5*
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- *"Documentation" on page 7*
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About This Guide

The Reviewer's QuickStart Guide is intended to help familiarize reviewers and case users with the user interface, and how to search, review, and analyze documents in preparation for case administrators to export/produce documents in Veritas eDiscovery Platform.

Revision History

The following table lists the information that has been revised or added since the initial release of this document. The table also lists the revision date for these changes.

Revision Date	New Information
July 2022	• Removed the Score column from the image related to Tag Event History search result. See *"Tag History Search" on page 27*. • Corrected the description in point D for 'Item Navigation' buttons, see *"Viewing Documents in Full Screen Mode" on page 31*. • Updated the View Log icons in a image under Export or Print Documents section. • Updated the filter Refresh button related content. Added the filter Refresh button in the relevant images.
March 2022	• Updated the content as per UI change in Analysis & Review tab for 508 compliance. • Added content on how to run the fuzzy search using freeform search. See *"Search Syntax Quick Reference" on page 15*.
December 2021	• Updated version for release 10.1
March 2021	• Updated the sections related to review • Minor edits
March 2020	• Minor edits

Revision Date	New Information
October 2018	• Minor edits
March 2018	• Added information related to 2018
December 2017	• Minor edits, graphics updates • Added classification to filters
June 2017	• Minor edits, graphics updates
July 2016	• Branding and minor edits
August 2015	• Update Find Similar graphic • Screen shot updates throughout • Remove Rights Management Guide
March 2015	• Image accessibility • Branding and minor edits
October 2014	• Item Level View enhancements • New user interface navigational changes • Branding edits
November 2013	• Referred users to Audio Search Guide • Added note that PDF printing "include files and attachments" is checked by default
June 2013	• Updates to graphics involving item-based tagging and email header search.
September 2012	• Updated guide and graphics to include and show new feature information throughout.
March 2012	• Advanced Search Report enhancements including: – Keyword search results and count totals are now divided up into more specific sources that include: Email messages, Loose files, Documents, Attachments and Reviewable items. – New export capability which allows users to export the Keywords section report in a easy-to-read format for Microsoft Excel • Branding and formatting updates only. All content merged from another file source.

Technical Support

Technical Support maintains support centers globally. All support services will be delivered in accordance with your support agreement and the then-current enterprise technical support policies.

For information about our support offerings and how to contact Technical Support, visit our website:

https://www.veritas.com/support

You can manage your Veritas account information at the following URL:

https://my.veritas.com

If you have questions regarding an existing support agreement, please email the support agreement administration team for your region as follows:

Worldwide (except Japan)	CustomerCare@veritas.com
Japan	CustomerCare_Japan@veritas.com

Documentation

Make sure that you have the current version of the documentation. The latest documentation is available from:

- **Documentation** link at the bottom of any page in the Veritas eDiscovery Platform landing page.
- **Veritas Products Web site:** https://www.veritas.com/product

Documentation Feedback

Your feedback is important to us. Suggest improvements or report errors or omissions to the documentation. Include the document title, document version, chapter title, and section title of the text on which you are reporting. Send feedback to:

eDiscovery.InfoDev@veritas.com

You can also see documentation information or ask a question on the Veritas community site.

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Getting Started

This section describes the initial steps you need to take to get your appliance ready for users and provides an overview of the Veritas eDiscovery Platform user interface.

Logging in to your Veritas eDiscovery Platform System

Before You Begin: Your Veritas eDiscovery Platform interface is entirely web-based. You can access Veritas eDiscovery Platform using Chrome and Microsoft Edge (chromium) from any Windows-based computer, and Safari from Apple Macintosh computers.

For more information on the supported versions of browsers, see the *Veritas eDiscovery Platform™ Browser Compatibility Charts*.

To log in

1. Determine whether you are a **Local user** or an **Enterprise user**. Your administrator should provide you with the appropriate log on information.
   - Local users should receive a username and password. (Continue to step 2.)
   - Enterprise users may receive browser configuration details. (Skip to step 3.)
2. If you are a **Local user**:
   A. Enter the name or IP address (IPv4 or IPv6 format) of Veritas eDiscovery Platform in your browser.
      http://<ServerName> or *http://<IP address>*
   B. On the login screen, enter your user name and password and click **Login**. Your administrator emails this information to you.
   C. Go to step 4.
3. If you are an **Enterprise user** who is logging in for the first time:
   A. Open your browser.
   B. Add the supplied fully-qualified domain name (FQDN) to the browser's list of secure websites. Example: VeritasAppServer.corp.com
   C. Enter the name or IP address (IPv4 or IPv6 format) of Veritas eDiscovery Platform in your browser.
      http://<ServerName> or *http://<IP address>*

   Note: After you add the FQDN to your browser, you only need to enter the Veritas eDiscovery Platform URL to be automatically logged in.
4. On the user interface, if you have access to multiple cases you will be prompted to select a case immediately after logging in. Select a case.

Note: If your preferences are set to save your session when you log out, when you log back in you might be prompted to resume your last session. You will not be prompted if you chose to always automatically resume the previous session.

To open another browser window, start a new browser session and log in. Do not use **CTRL+N** to open multiple windows for the same Veritas e Discovery Platform application.

Logging Out

Before Logging Out: When you log out of Veritas eDiscovery Platform while viewing search results or reviewing documents in the Analysis & Review module, you have the option to save your place. The next time you log in, you have the option to return where you left off or to log in to the default screen.

To log out

- To log out, click **Logout** at the top of the screen.

  Note: Inactive users are logged out automatically after a configurable amount of time (default is 30 minutes). If your session times out, you will be returned to your current state if you have previously logged out and (1) specified that you want your search state to be saved and (2) that you do not want to be prompted to save the state again.

Changing Your Account Preferences and Password

You can update your account preferences and password any time you are logged in to the user interface.

Note: You can change your password through the account preferences interface or through the Change password interface.

To update account preferences

1. Click your user name at the top of the screen.
2. From the drop-down menu, click **Preferences...**
3. Update any of the following information:
   - Email address
   - Show InfoBubbles
   - Display Microsoft Office documents
   - Resume search state on login enabled
4. To change your password, click **Change Password...**.

The Change Your Password dialog box displays. Type the old and new passwords in the fields provided, and click **OK**.

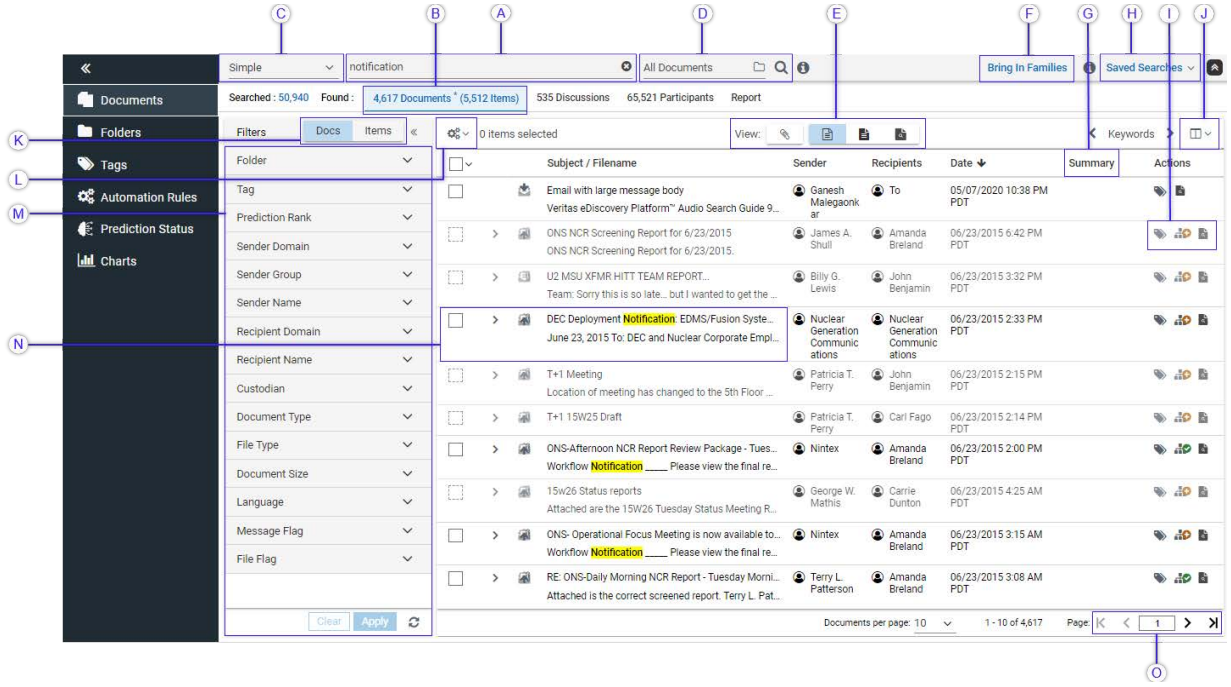
5. Click **Save**.

To change your password

1. Click your user name at the top of the screen.
2. From the drop-down menu, click **Change password...**
3. On the Change Your Password window, type the requested information.
4. Click **OK**.

Understanding the Analysis & Review Interface

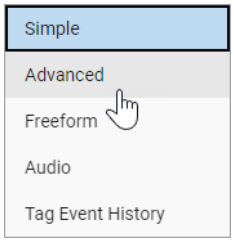
The Analysis & Review interface is where you perform all search, review, and document management tasks.



A. Enter a search term (for basic searches).

B. View search results by number of documents / items, (plus any hits resulting from advanced search queries).

C. Click Search list to see the other search options.



D. Select folders for review or production.

E. Choose the level of detail displayed through viewing modes.

F. Version 8.0 introduces the option to add every member of a document family to your results. Before trying this option, consult the *User Guide* for more details.

G. Tag Summary for each item will display when you hover over this icon, showing the folder and tag details.

H. Rerun previous and saved searches.

I. Select an icon to tag or review an item. If the item is part of a family, another icon will appear, indicating whether items from the same family can be brought in or have been already.

J. Select the columns to display on the page.

K. Docs Items Filter Count: Quickly switch between any of the ready-to-use search filters to view either Document Family or Item Level counts. Except for the Message Flag and Document Size filters, you can toggle between Document Family and Item-Level counts for all of the Search Filters for easy display of only the filter counts that interest you.

L. Select an action to **Tag**, **Export**, **Print**, **Batch**, **OCR**, and **Cache** groups of documents. (Depending on your assigned role, additional options may be available.)

M. Filter and cull down the searches with Search Filters. Use the filter Refresh option to update the search filters.

N. Select a default document or items to review. Attachments display in their own row and are no longer nested within the parent message hierarchy.

O. Navigate through search term hits.

Note: If after upgrade you can no longer access a case that is in your workflow, you may need to have the role associated with your user account changed. Please contact your administrator.

Searching

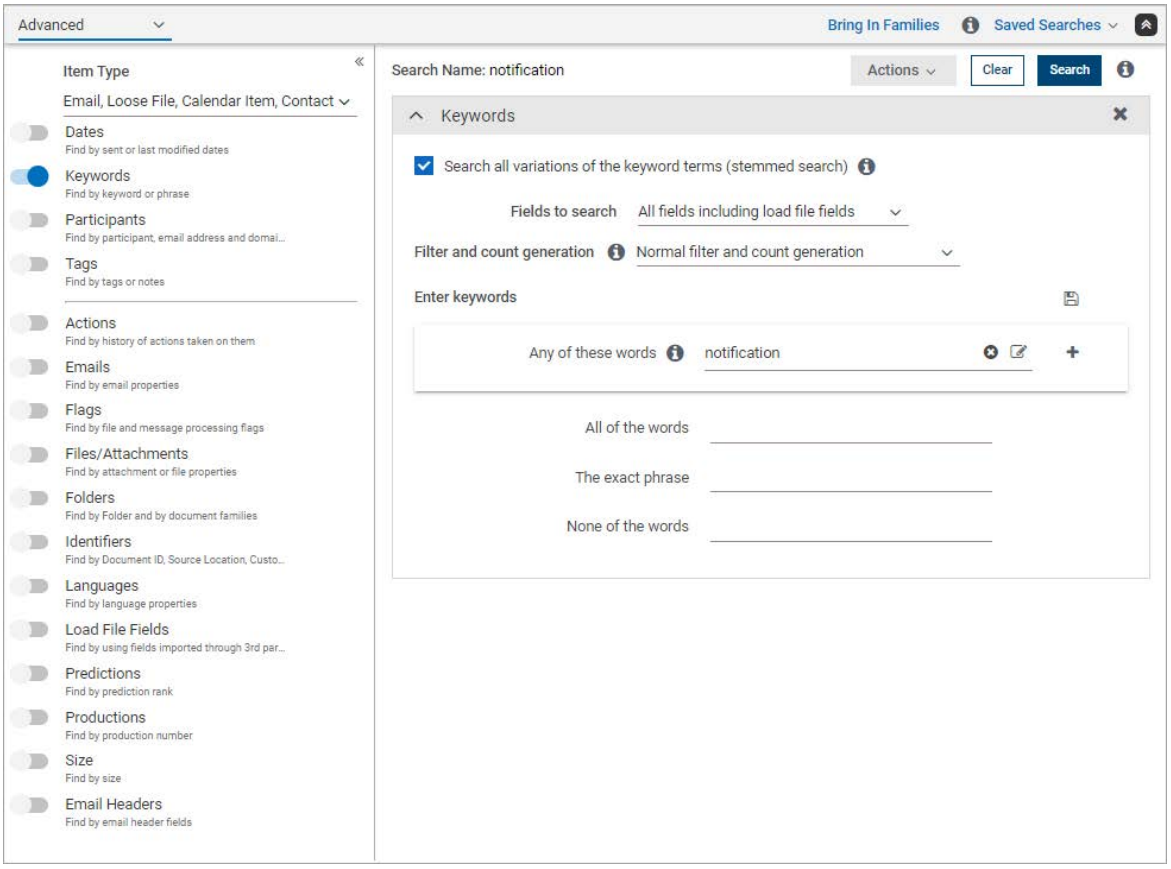
This section provides basic, introductory information on search. For more about Advanced Search capabilities in-depth, see *"Advanced Search" in the Veritas eDiscovery PlatformUser Guide*. For information about the Audio Search feature, consult *"Using Audio Search" in the Veritas eDiscovery Platform User's GuideAudio Search Guide*.

A Keyword search can be performed through the Basic Search field or the Advanced Search screen.

Note: You can add more words or phrases to the same Keyword search, up to 100 lines, by clicking the plus icon.

Basic Search Field

Advanced Search screen



General Notes

- Performing a blank (empty) search will return all documents in the case.
- If no Boolean operator is entered between terms in the Basic Search field, the default OR Boolean operator is used.
- Searches involving Boolean, phrase, wildcard, or proximity queries can be entered into the Basic Search field or the Any of these words field on the Advanced Search screen. These types of searches are generally not supported in other fields within Advanced Search.
- The size of the input fields on the Advanced Search screen will grow as you add text.
- All searches from the Basic Search field and Advanced Search screen are not case-sensitive.
- Refer to the *User Guide* for details on Basic and Advanced Search screen features and capabilities.
- Stop words (such as "and" and "the") are indexed and available for searching.
- Keyboard shortcuts for the Advanced Search screen: ALT+R (Run Search), ALT+C (Clear screen).

Search Syntax Quick Reference

The following table describes basic syntax used in eDiscovery searches.

Search Syntax Quick Reference

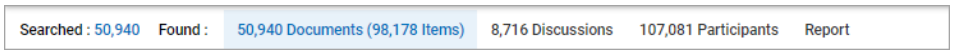
Query Type	Syntax	Comments
Stemmed vs. Literal	Basic Search field: Searches are always stemmed Advanced Search screen: Select stemmed or literal search using the Search all variations of the keyword terms (stemmed search) check box	Enclosing text in quotes does not affect stemming behavior. Words in exact phrase and proximity searches will be stemmed when run as a Basic Search or an Advanced search with the stemming on.
Boolean Operators & Groupings	Logic Operators: OR, AND, NOT Groupings: ( )	The text operators, OR, AND, and NOT must be capitalized. (Otherwise, these will be used as search terms/keywords.)
Wildcard	* for multi-character wildcard searches. Matches zero or more characters ? for single-character wildcard searches	Wildcard characters can be used in the beginning, middle and end of terms.
Phrase	"term1 term2"	A match occurs only on "term1 term2".

Search Syntax Quick Reference

Query Type	Syntax	Comments
Proximity	term1 w/n term2 or "term1 term2"~n	w/n specifies the number of words that can separate the terms. In other words, term1 is within n words of term2. The w/n operator is not case sensitive. **Note:** Because w/n is now an operator, searches containing the string, w/n, are interpreted as proximity searches. Verify that the saved searches of upgraded cases are not impacted. Upgraded cases containing saved searches with the string, w/n, may result in an error. Saved searches with the string, NOT w/n, are now run as a proximity search. *OR* Using the tilde, ~, symbol at the end of a quoted phrase followed by the number of other search terms, n, that are allowed to come between the terms specified.
Nested Proximity	term1 w/n (term2 w/n term3)	Nested proximity searches combine two query types, proximity and grouping. Example nested proximity phrase: "decaf coffee" w/4 "delicious biscotti"
Wildcard	polic*	A match occurs on all terms that begin with "polic." Veritas eDiscovery Platform supports both * and ? wildcard characters. Refer to the "Advanced Search" chapter, in the section "*Wildcard Searches*" in the *User Guide* for more details on how to run wildcard searches.
Fuzzy	u_body:roam~	Veritas eDiscovery Platform supports fuzzy searches using freeform search. To perform a fuzzy search, add a tilde (~) at the end of a one-word term. For example, to find terms like "foam" and "roam" in the body of an email, enter the following fuzzy search: u_body:roam~

Understanding Search Result Statistics

At the top of the Analysis & Review module, a quick summary of your document search displays.

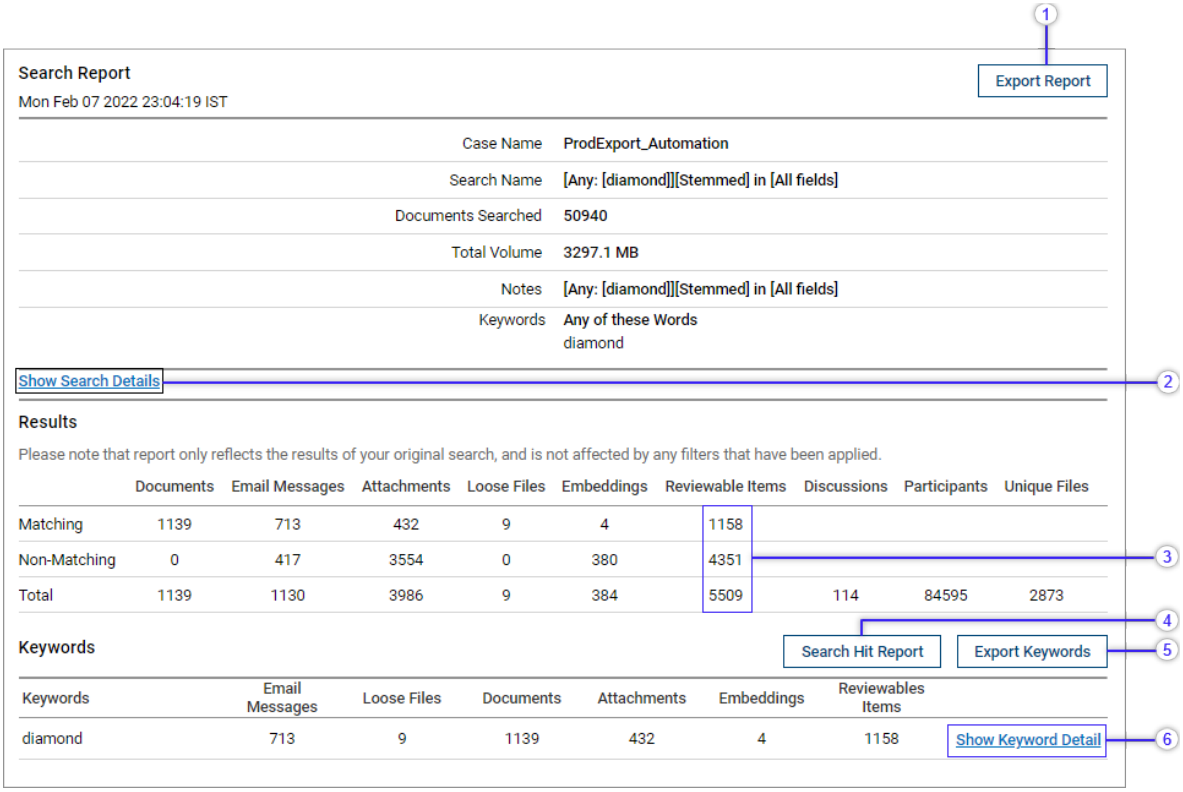


Understanding Search Result Statistics

Criteria	Effect on Search
Searched	Total number of email messages and loose files searched.
Found	Total number of Documents and Items found that match the search criteria. • "Documents" include email messages and loose files. • "Items" refers to all reviewable items which include email messages, attachments, and loose files, and embeddings, but do not include duplicates. **Note:** Your Items number will often be higher than your Documents count. **Note:** Starting in version 8.0, if there are partial document families returned for a search, an asterisk will appear on the Documents tab. You will be given a link to bring in families. Consult the *User Guide* section "*Things You Need to Know*" for more information on this feature. See also *"Document Screen" on page 20* for icon information and detail available in your results.
Discussions	Unique number of discussions that contain at least one email in the found documents. Click the **Discussions** link at the top of the screen to display this information.
Participants	Number of participants or the number of unique email addresses - either sent or received email messages - contained within the set of found documents.
Report	View Search report containing statistics, results, and keywords used. Click this link to display a summary report on the search results. (Also contains Concept Search report when a Concept Search is run.)
***Partial Document families returned:** For searches that do not involve a full corpus search, indicates that not every member of the document family is returned.	
Bring in families: Adds every member of every document family to your results. This is useful when attachments match the search criteria but you want to include every other member of the document families in your result and filters. It may, for example, be more efficient to review attachments to an email at the same time as reviewing an email.	

Search Report Screen

A detailed search report is available each time a search is performed. To access the report, click the **Report** link.



1. **Export Report**. Click to export Keyword information in CSV format.
2. **Search Detail** link. Click to show/hide detail.
3. **View Results Detail**. Results (matching and non-matching) show total counts for documents, and for each individual item type, including a separate column for "Embeddings". (The cumulative total under "Reviewable Items" does not include documents.)
4. **Search Hit Report.** Click to generate a report mapping Doc IDs to keyword hits. Access the report through the **Jobs** window.
5. **Export Keywords**. Click to export the report in CSV format. Keywords must be specified through Advanced Search.
6. **Keyword Detail** link. Click to show/hide detail (to show all variations of your keyword search results).

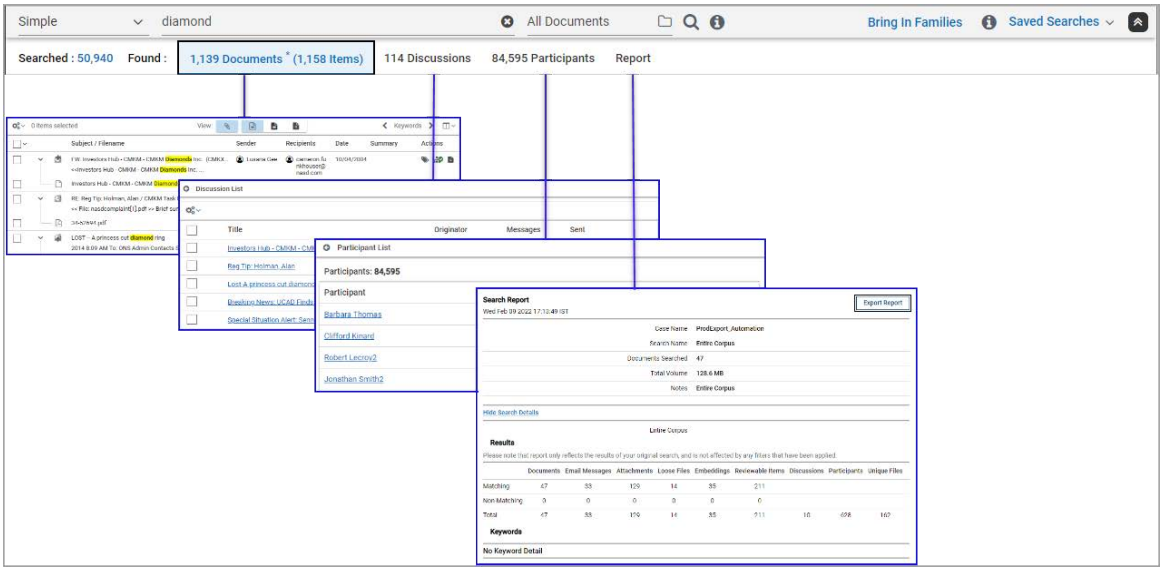
Analyzing Results

This section provides a basic overview of how to analyze your search results in the Analysis & Review module.

- *"Document Screen" on page 20*
- *"Filters" on page 21*
- *"Tagging Documents" on page 25*

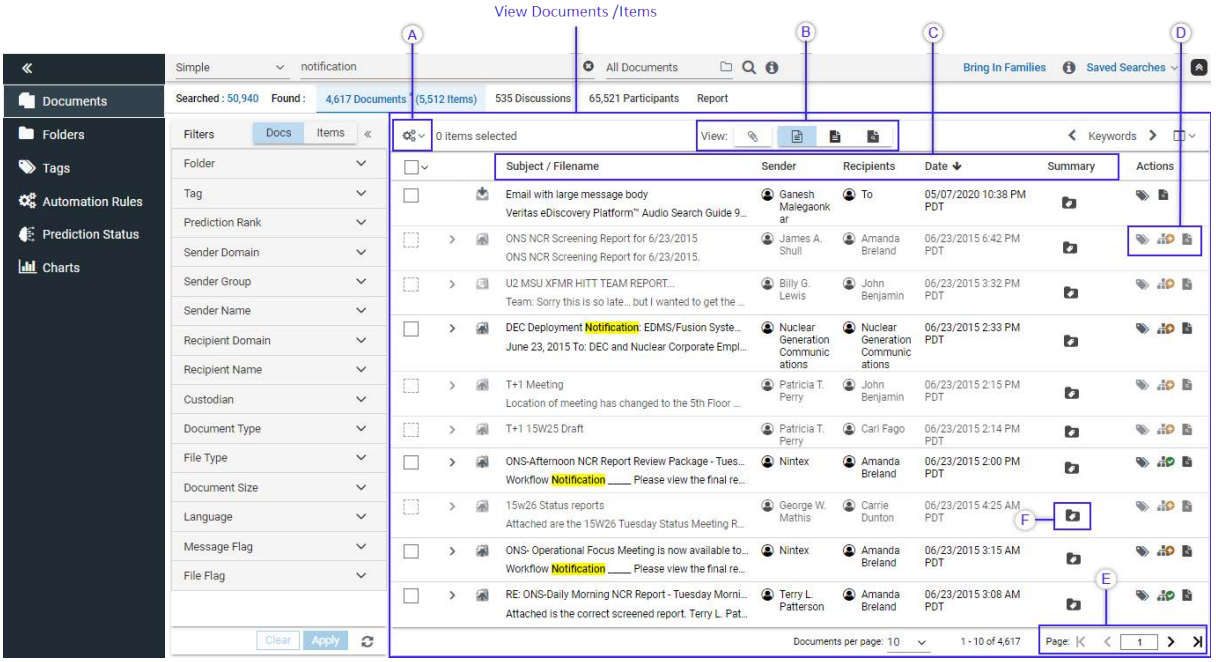
Overview

Search results can be viewed by **Documents/Items**, **Discussions**, **Participants,** or **Report**. Click on the respective link within the Analysis & Review module to go to that screen.



Document Screen

The Document screen lists the documents (messages and loose files), and reviewable items (messages, attachments, loose files, and embeddings) retrieved from the search result.



A. **Choose an Action to perform**: Tag, Folder, Export, Print, Batch, Cache, OCR, or Redact. (For information about OCR processing, refer to the *Case Administration Guide*.) Additional options for predictive coding may be available. (For more information, refer to the *Transparent Predictive Coding Guide*.)

B. **Change Viewing Mode**. Click to view Snippet (default, shown), Details, or Review modes.

C. **Sort by Columns**. Search results are automatically sorted by relevance Score. Click on any column to sort the results by that column. Additional columns, such as "Attributes", "Production Number" appear only if you included those document/item types in your search, and were found in your results set.

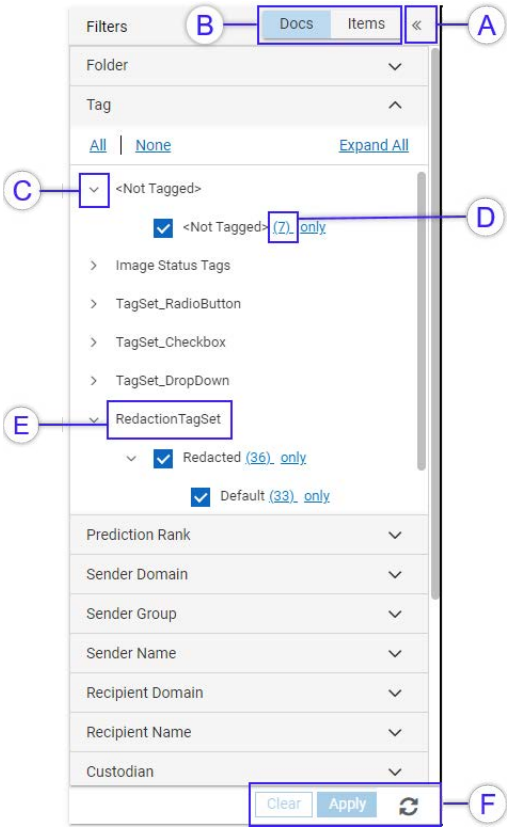
D. **Perform other review tasks**. Click to view document/item detail (in Full Detail mode), tag the item, view related discussion threads, find similar items, or review the document/item in Review mode.

E. **Navigate pages**. Advance through pages, or navigate using keyboard shortcuts **ALT+** (Down arrow) and **ALT+** (Up arrow).

F. **Information icons**. Hover over any icon for more information about the document. The "Tag Summary" icon shows tag history for the item, the folder in which the tagged item is located, and the tag name.

Filters

A variety of filters are automatically generated based on the search results.



A.**Hide or Show the Filter Pane**. Click the arrow on the right of the pane.

B.**Filter Documents or Items count.** Quickly switch between any of the ready-to-use search filters to view either Document Family or Item Level counts. Except for the Message Flag and Document Size filters, you can toggle between Document Family and Item-Level counts for all of the Search Filters for easy display of only the filter counts that interest you.

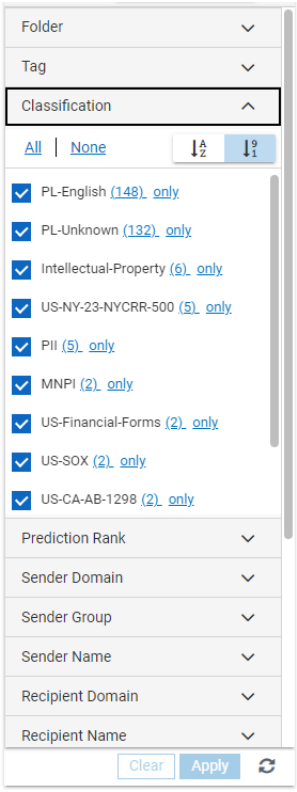
C.**Display Filter Values**. Click the arrow to the left of each filter category.

D.**View the Number of Results**. Click the number associated with a filter to view that filter's results. Click again to return to all the results.

E.**Filter Generated Tags for redacted items.** Identify and locate tagged items. Click to display documents.

F.**Apply Filters or Clear Filters**. Click to apply or clear your search results. Click the **Filter Refresh** option to update the search filter.

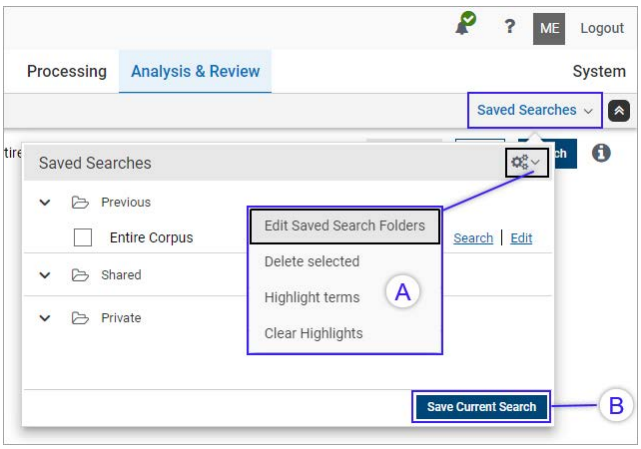
Note: Results displayed in the Filter pane can represent items or documents depending on the filter.



When the case has been set up to use it, classification information also appears as a tag in the filters area. Expand the Classification section to show the tags for all the enabled policies, which will show when at least one document matches.

About Previous and Saved Searches

View the saved search results in Saved Searches window.



A. **Apply Highlights to Search Results**.

B. **Save the Current Search**.

Previous Searches

A history of previous searches is recorded under the Previous Searches section. Click on the search name to run the search.

Saved Searches

Frequently used searches can be saved for quick access. To save the current search, click the Save Current Search button, then name the search and classify it as shared or private when prompted. Shared saved searches are available to all users. Private saved searches are only available to you. Saved searches are displayed under the Saved Searches section. Click on the search name to run the search.

While saving a search, you can specify a color to highlight search terms. You can later apply hit highlighting from multiple searches to any result set on screen. Select the searches with the desired terms and click the Highlight terms option in the Actions menu.

Note: If you are running an Activity Report, saved searches will appear as Basic, not Advanced searches, as separate line items. In Veritas eDiscovery Platform, basic searches are stemmed. Thus, saved searches (appearing as basic searches in the Activity Report) may or may not be stemmed depending on the search settings.

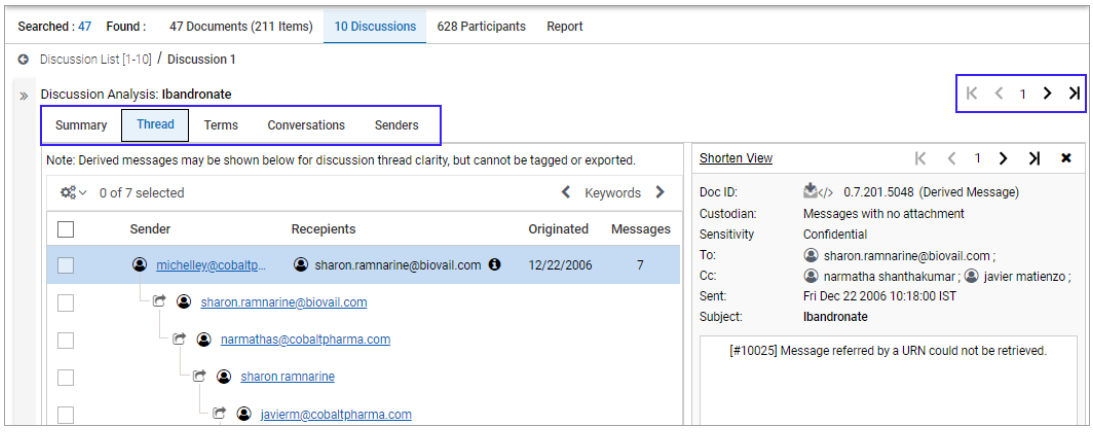
Discussions Screen

The Discussion screen displays a table listing all discussions within the search query results. This view can give you insight into how well your search query is targeting the information you are searching for. From the Discussions screen, you can sort discussion column headers or open a discussion for further analysis.

To open a discussion, click on the discussion title. The Discussion Analysis screen loads, defaulted to the Thread tab.

Discussion Analysis

The **Discussion Analysis** screen includes tabs for **Summary**, **Thread**, **Terms**, **Conversations**, and **Senders**. Each tab provides a different view into analyzing the discussion.



Note: Messages with grey check boxes in the **Thread** tab are Derived messages. The messages are included in forwards or replies, but they do not exist as standalone messages. They provide additional context within Thread view.

Discussion Thread Visualization

An important aspect of Discussion Analysis is Thread Visualization. The Thread tab presents the thread in a graphical display. Click on an individual's name to display the document they sent. Hover your mouse over an individual's name or arrow to pop-up more information.

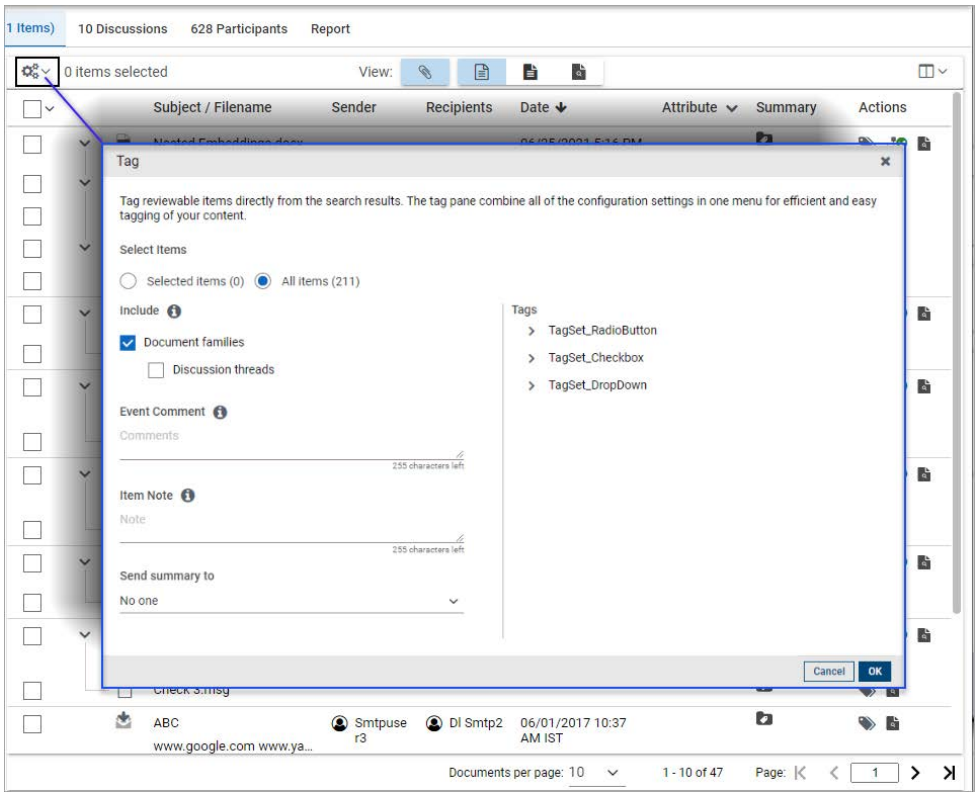
Tagging Documents

The Veritas eDiscovery Platform's tagging features allow you to classify items or entire document family by tagging them with pre-defined values such as Responsive, Privileged, Escalate, Not Important, etc. Tags can be grouped under Tag Sets such as Early Case Assessment, Review, etc. Tag sets and values are created by a Case Administrator.

Bulk Tagging

From the **Documents** Screen, click the **Actions** menu and select **Tag** to reveal tagging options. The Actions menu is located above the list of search results. The Tag pane combines all of the configuration settings in one menu for efficient and easy tagging of your content.

For more information about document family and item-level tagging, see the *User Guide*.

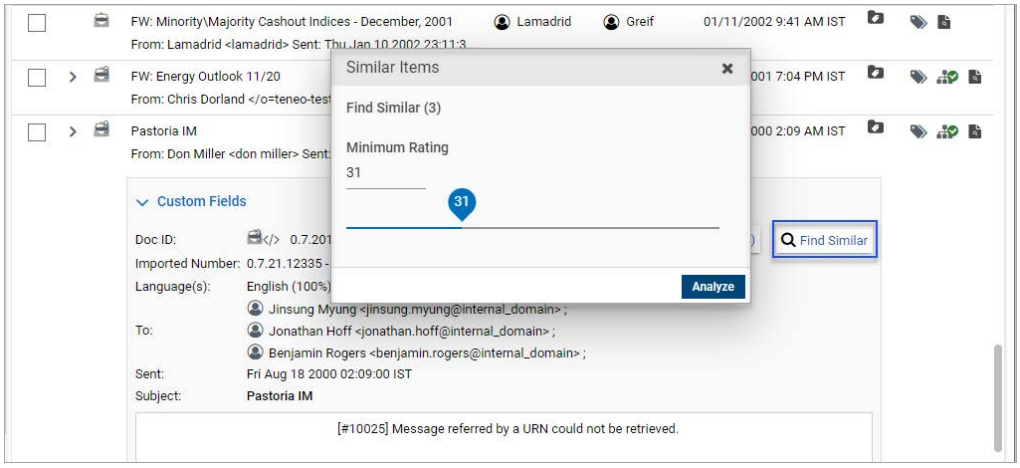


Viewing a Document's Tags

Once a document has been tagged, a Tag Icon is displayed next to each document. Hover your mouse over the Tag Icon to display the document's tag values. Click on the History link to reveal a history of tag operations associated with the document.

Finding Similar Items

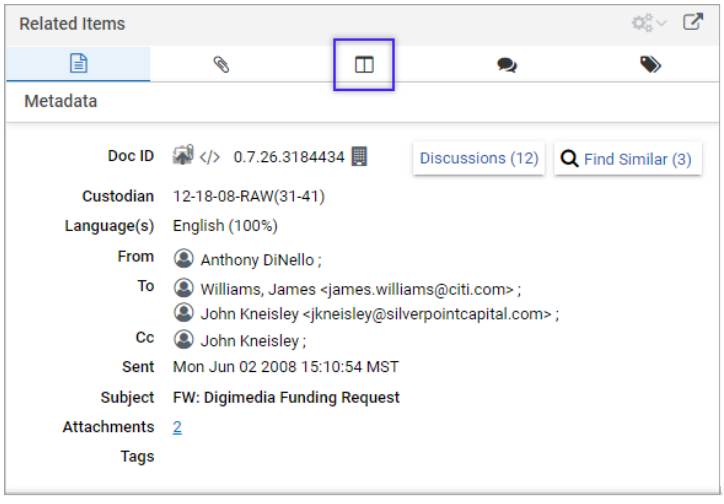
Two email messages, attachments, or loose files are considered similar based on whether the number of shared terms exceeds a user-set threshold.



The Find Similar Histogram

Move the blue slider left or right to adjust the level of similarity of items you want to review. The value of the Minimum Rating changes as you move the slider. The higher your rating, the more closely similar the documents are to one another. Clicking **Analyze** displays as many similar items for each individual item in the list of similar results.

Note: You can also view similar items from the Related Items pane within Review Mode. (See Related Items Pane.)

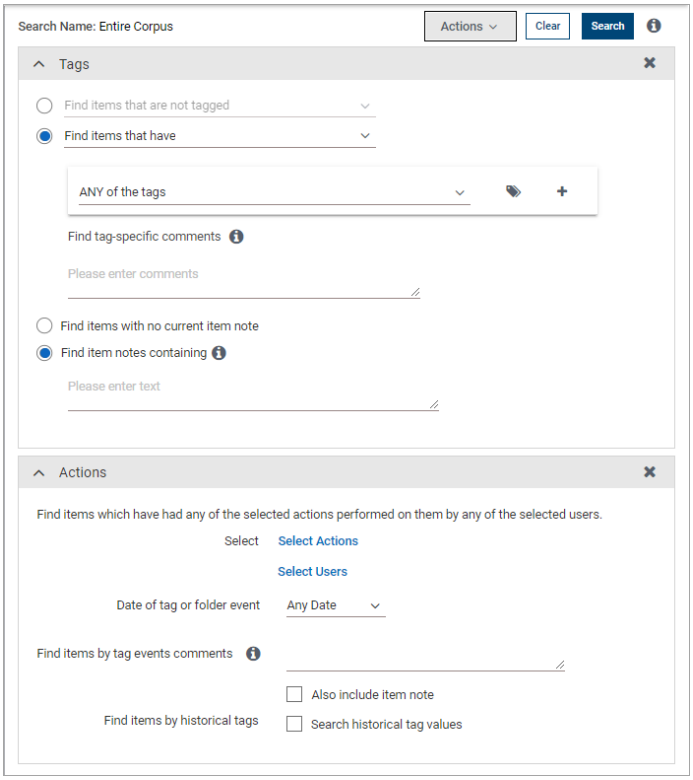


Original Document to Similar Items

When viewing similar items to a selected document, the first one in the list is always the original. The primary (or document on which the similar documents are based) is indicated by a grey background.

Searching by Tag Values and Actions

Defined tag categories and values are automatically added to the Advanced Search screen. These options can be used to retrieve result sets that have been classified.



The Tags section enables you to search documents by all or any of their current tag values or comments associated with a tagging event. You can also search for documents without specified tags.

The Actions section enables you to search for documents that have had specific actions performed on them.

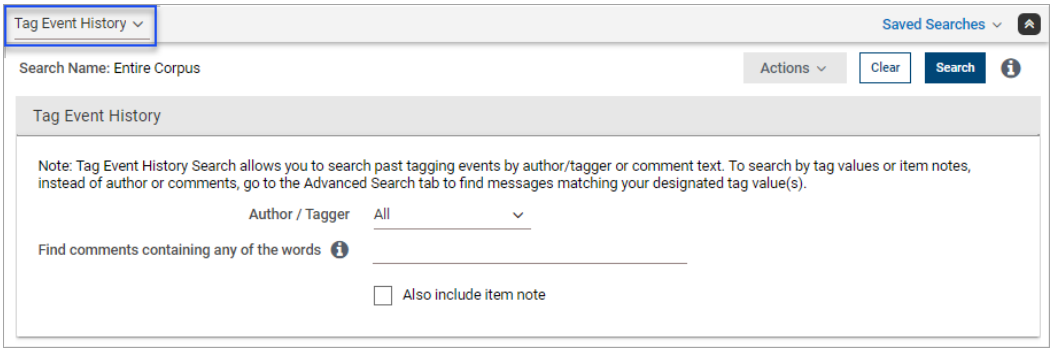
- Tagging or removing tags
- Redacting or removing redactions
- Moving documents to folders
- Adding or editing comments

You can also search on the previous tags that a document might have had assigned to it.

Tag History Search

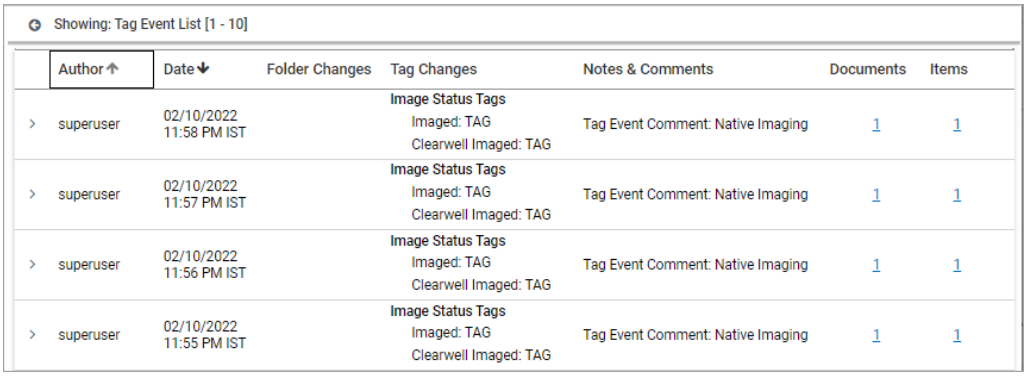
The **Tag Event History** option on the Search list provides access to a searchable history of all tag operations and can be used to review or reverse tag operations.

To reverse a tag operation, select a tagging event to display the impacted documents. Then, using the Tag interface, update the documents by bulk tagging them. Note that this bulk change could override the tagging operations of other reviewers.



Tag Event History Search screen

When viewing your results, the Tag Event History displays both the document and item counts separately, for folder and tag events.



Showing: Tag Event List [1 - 10]

	Author	Date	Folder Changes	Tag Changes	Notes & Comments	Documents	Items
›	superuser	02/10/2022 11:58 PM IST		Image Status Tags Imaged: TAG Clearwell Imaged: TAG	Tag Event Comment: Native Imaging	1	1
›	superuser	02/10/2022 11:57 PM IST		Image Status Tags Imaged: TAG Clearwell Imaged: TAG	Tag Event Comment: Native Imaging	1	1
›	superuser	02/10/2022 11:56 PM IST		Image Status Tags Imaged: TAG Clearwell Imaged: TAG	Tag Event Comment: Native Imaging	1	1
›	superuser	02/10/2022 11:55 PM IST		Image Status Tags Imaged: TAG Clearwell Imaged: TAG	Tag Event Comment: Native Imaging	1	1

Tag Event History Results with linked documents and items

The underlined counts are links to the original document or item. Click any link in the results to view in the Document review screen. (This example shows both documents and items that were tagged as part of the Predictive Coding workflow.

Reviewing Documents

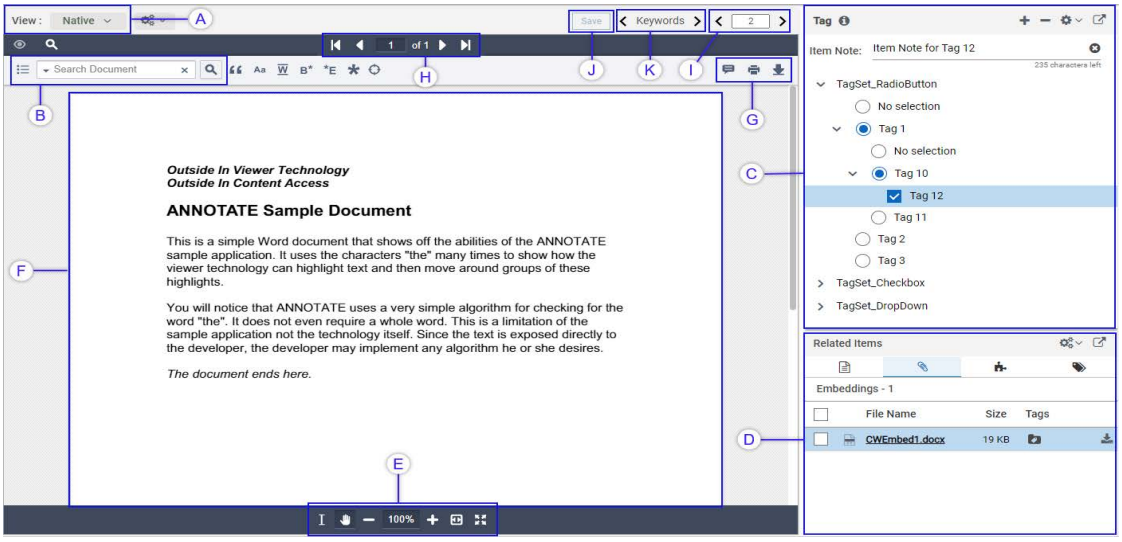
This section provides a basic overview of how to use the various review features and screens in the Analysis & Review module.

- *"Understanding the Review Interface" on page 29*
- *"Viewing Documents in the Native Viewer" on page 30*
- *"Linear Review" on page 32*

Overview

The **Review Mode** allows for faster review by optimizing screen real estate, enabling user customizations, and reducing number of clicks to tag a document. Activate Review Mode by clicking on the right-most icon in **View** options on the Documents screen. In Review Mode, documents can be viewed in Text (HTML) format or in native format via the Native Viewer.

Understanding the Review Interface



A. View documents/items in Native or Text (HTML) mode. Select the options for Redaction, Annotation, or Production of documents/items.

B. Search within the displayed document.

C. Tag documents and view document/item notes.

D. Access items related to the current document, such as metadata, attachments, discussions, similar documents, and custom attributes.

E. Document display options, such as Select text, Pan Tool, Zoom In/Out, Fit content, and Full screen.

F. View the document.

G. Comment, Print, or download the document.

H. Navigate through the document.

I. Item navigation.

J. Save the document.

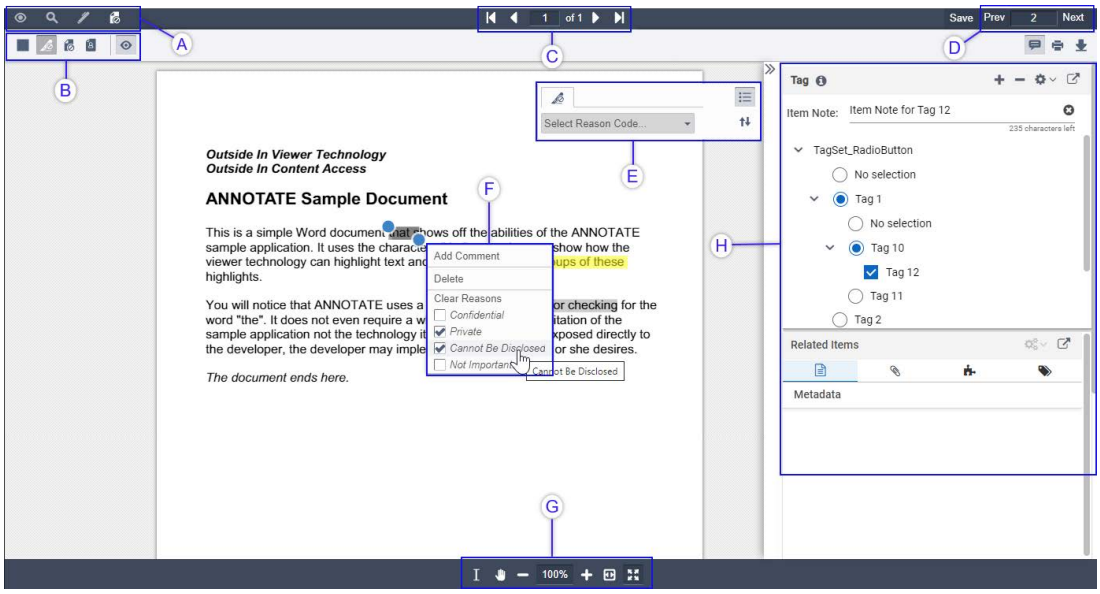
K. Keyword navigation.

Viewing Documents in the Native Viewer

When you select the "Native/Image" view mode, documents will be displayed in near-native format (as they would appear if printed by the native application). All viewer features are also available in Redaction and Production views.

Viewing Documents in Full Screen Mode

You can view the documents in a full screen mode to see more of the document.



A. View, Search and Redact, Annotate, and Redact

B. Area Redaction, Text Redaction, Page Redaction, and Privacy Information Redaction

C. Navigate through the document

D. Navigate to the required item

E. Extended tools for the tool selected in B

F. Quick Action menu

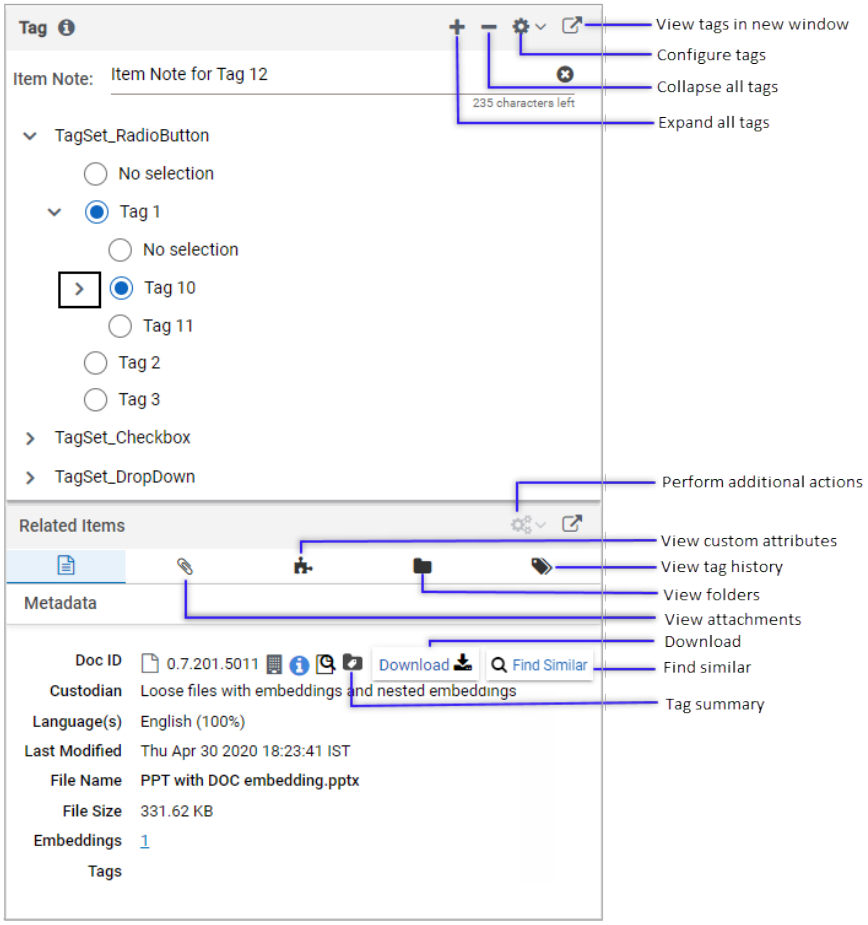
G. Display options

H. Tagging and Related Items panel

Linear Review

Tagging

Tags are a simple way to indicate the status and relevance of a document. Tags enable you to classify documents based on selection criteria predefined by your case administrator.



- **Save** The Save button applies the selected tag(s) to the document.
- **Save and Next Item**.The Save and Next button applies the selected tag(s) to the document and immediately moves to the next document.

Related Items Pane

The Related Items pane contains information related to the document displayed in Review Mode. The first item in the list, in bold, is the primary document on which other similar or related items are based. Click links to search for similar items for each individual item in the list. To accelerate review and improve reviewer consistency use the Related Items pane to search: Attachments (available only in Related Items pane), Discussion Threads, Similar Documents,

Custom Attributes (if present in results data and specified in search), Folders, and Tag History. Both single and bulk documents within discussion threads can be tagged, exported, and printed from the Related Items panel.

Note: Veritas eDiscovery Platform does not currently support searching similar documents to derived discussion messages. Thus, the Similar Items link in Review mode is not displayed.

Review & Tagging Shortcut Keys

Review & Tagging Keyboard Shortcuts

Hide Browser Toolbar	**F11**
Previous Document	**ALT+P**
Next Document	**ALT+N**
Displays Next Hit	**ALT+** (Down arrow)
Displays Previous Hit	**ALT+** (Up arrow)

For a complete list of all keyboard shortcuts used in the product, refer to the *Keyboard Shortcuts Reference Card*.

For more information about actions reviewers can perform, such as redaction, annotation and Bulk Redaction, see *"Review, Annotate and Redact" in the User Guide*.

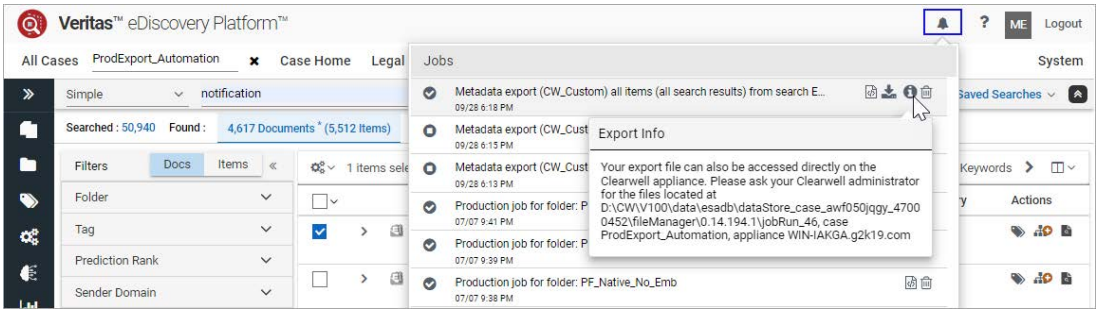
Exporting and Printing

Depending on your user account and access group rights, you may or may not have access to the export and print functionalities. Refer to the *Export and Production Guide* for more information.

Export or Print Documents

Click **Bulk action menu** icon **> Export** to reveal the options for native, metadata, and production exports. Click **Bulk action menu** icon **> Print** to print documents to PDF or generate a document log: note that "include files and attachments" will be checked by default.

After making your selections, click **Export**, or **Print** to run a job. Results appear in the Jobs window. To retrieve exported or printed files, click the **Jobs** link to display jobs and download the exported files.



The Jobs window displays the current status for export and print tasks

The note tells you where you can find the expected file: "Your export file can also be accessed directly on the appliance. Please ask your administrator for the files located atD:\<file path>"

If your export job fails to complete successfully, you may want to try re-running your export using various troubleshooting tools and techniques available. Refer to the *Export and Production Guide* for more information.

Note: If the export size exceeds the maximum size limitation of a zip file (2GB is the default), you will need to contact your Veritas eDiscovery Platform administrator to retrieve the exported files.

Starting with release 9.1, users can export an Excel-based metadata report (Privilege/Redaction log) of each item withheld or redacted in one or more production folders. Refer to the *Export and Production Guide* for more information.

Next Steps…

Refer to the *User Guide* (for reviewers who perform search and analysis tasks on case data).

For reviewers assigned a role which permits certain tasks, such as preparing analyzed data for export/production, refer to the *Export and Production Guide* for details on how to perform advanced export, print, and production tasks.

Appendix A: Product Documentation

The table below lists the administrator and end-user documentation that is available for the Veritas eDiscovery Platform product.

Veritas eDiscovery Platform Documentation

Document	Comments
Installation and Configuration	
Installation Guide	Describes prerequisites, and how to perform a full install of the Veritas eDiscovery Platform application
Upgrade Overview Guide	Provides critical upgrade information, by version, useful prior to upgrading an appliance to the current product release
Upgrade Guide	Describes prerequisites and upgrade information for the current customers with a previous version of the software application
Utility Node Guide	For customers using utility nodes, describes how to install and configure appliances as utility nodes for use with an existing software setup
Distributed Architecture Deployment Guide	Provides installation and configuration information for the Review and Processing Scalability feature in a distributed architecture deployment
Getting Started	
Navigation Reference Card	Provides a mapping of review changes from 10.x compared to 9.x, 8.x compared to 7.x and thex user interface changes from 7.x compared to 6.x
Administrator's QuickStart Guide	Describes basic appliance and case configuration
Reviewer's QuickStart Guide	A reviewer's reference to using the Analysis & Review module
Tagging Reference Card	Describes how tag sets and filter type impact filter counts
User and Administration	
Legal Hold User Guide	Describes how to set up and configure appliance for Legal Holds, and use the Legal Hold module as an administrator
Identification and Collection Guide	Describes how to prepare and collect data for processing, using the Identification and Collection module
Case Administration Guide	Describes case setup, processing, and management, plus pre-processing navigation, tips, and recommendations. Includes processing exceptions reference and associated reports, plus file handling information for multiple languages, and supported file types and file type mapping
System Administration Guide	Includes system backup, restore, and support features, configuration, and anti-virus scanning guidelines for use with Veritas eDiscovery Platform
Load File Import Guide	Describes how to import load file sources into Veritas eDiscovery Platform
User Guide	Describes how to perform searches, analysis, and review, including detailed information and syntax examples for performing advanced searches

Veritas eDiscovery Platform Documentation

Document	Comments
Imaging Tool Upgrade Guide	Release 10.0 replaced the IGC Native Viewer with PrizmDoc Viewer. This guide provides details about the Imaging Tool Upgrade feature and how to perform Imaging Tool Upgrade for cases that were backed-up pre-10.0 and are restored in the current version of eDiscovery Platform, workflows affected when the cases are upgraded or not upgraded, and frequently asked questions (FAQs).
Export and Production Guide	Describes how to use and produce exports, productions, and logs (privilege and redaction logs)
Transparent Predictive Coding User Guide	Describes how to use the Transparent Predictive Coding feature to train the system to predict results from control data and tag settings
Audio Search Guide	Describes how to use the Audio Search feature to process, analyze, search and export search media content
Reference and Support	
Audio Processing	A quick reference card for processing multimedia sources
Audio Search	A quick reference card for performing multimedia search tasks
Legal Hold	A quick reference card of how to create and manage holds and notifications
Collection	A quick reference card of how to collect data
OnSite Collection	A quick reference for performing OnSite collection tasks
Review and Redaction	Reviewer's reference card of all redaction functions
Keyboard Shortcuts	A quick reference card listing all supported shortcuts
Production	Administrator's reference card for production exports
User Rights Management	A quick reference card for managing user accounts
Online Help	
Includes all the above documentation (excluding Installation and Configuration) to enable search across all topics. To access this information from within the user interface, click **Help**.	
Release	
Release Notes	Provides latest updated information specific to the current product release