



Autonomy Education

Autonomy Introspect Administrator & End User Training

Investigator/ECA (Autonomy's Early Case Assessment software module) and Introspect deliver an innovative approach to eDiscovery, through rapid data intake and streamlined processing, review and production processes that are fully compliant with the Federal Rules of Civil Procedure (FRCP). They achieve this by leveraging Autonomy's Intelligent Data Operating Layer (IDOL) to perform all eDiscovery operations on a single platform.

Along with Autonomy Legal Hold (ALH), Investigator/ECA and Introspect span the Electronic Discovery Reference Model (EDRM), thus enabling you to conduct all tasks, from Information Management and Legal Hold to Production on Autonomy's powerful common infrastructure.

This training plan pertains specifically to our two-day Introspect Administrator and End-User courses designed for legal users (particularly legal counsel, case managers, and document reviewers). However, because Introspect seamlessly integrates with Investigator/ECA to provide a complete EDD search/review/production platform, we encourage all users (except for document reviewers) to take this course in conjunction with our one-day Investigator/ECA course designed for legal users. For more information, please see our training plan for Autonomy's Investigator/ECA training course.

Autonomy's training courses are designed for various levels of technical sophistication, from the technical staff responsible for installation, configuration and administration of the Autonomy systems, to the end users who will use the solution every day. All our students are trained in a similar manner, using both theory and practical workshop training. Autonomy Education programs ensure each user fully understands the capabilities and features of the software before installing, configuring or just using the technology in the Autonomy workshop.

Autonomy's training courses are classroom/workshop based. Autonomy believes the most productive way to learn is to actively use the software. We encourage System Administrators and Engineers to attend most of the product training (particularly the Administration components), so that they not only know how to maintain the service, but can also troubleshoot more effectively when a user has a particular request. Our courses use pre-indexed data, which allows the trainer to lead the students through a well-designed set of workflow procedures representative of a typical workflow.

Course Name: Autonomy Introspect Administrator & End User Training

Duration of Course: Two days

Audience: **Day 1: Administration** is for implementation supervisors and legal users, particularly legal counsel and case managers.
Day 2: End User is for legal users, particularly document reviewers, review managers, and data analysts. Day 2 is also for users who may be responsible for document redaction and EDD/ESI production.

Training Format: Discussion, demonstration and hands-on practice using an Autonomy-hosted Investigator environment.

Course Agenda:

- Autonomy will provide:
- Two days of hands-on training
 - Fully Documented Training Materials which set out the tasks and lessons planned for each day
 - Each student participating in the practical workshop will be provided with a dedicated computer

Course Curriculum:

Day 1: Autonomy Introspect Administrator Training

Audience: Legal users (particularly case and review managers) and implementation supervisors.

Lesson:	Objectives:
Introspect Introduction	<ul style="list-style-type: none">• Trainer and student introductions• Autonomy Introspect overview• Overview of advanced analytics and visualization• Introduction to Introspect modules
Basic Matter Management	<ul style="list-style-type: none">• Create Customers• Create Matters• Create Roles• Create Users• Configure Settings

<p>Managing Data Sources</p>	<ul style="list-style-type: none"> • Set up Data Sources • Bulk-create Groups/Custodians/Sources • Ingest and index Data Sources • Deduplication considerations • Re-import failed Data Sources • Menu navigation • Delete a Group, Custodian, or Data Source • Unprocessed files and exception reporting
<p>Managing Tags, Fields and Roles</p>	<ul style="list-style-type: none"> • Create coding tags • Create and manage metadata fields • Create and manage Field Lists • Manage Field Validation • Modify Roles • Set matter-specific Role permissions • Set Field and Folder permissions
<p>Preparing for Review</p>	<ul style="list-style-type: none"> • Create Folders, Filters and Batches • Create custom Filters • Apply Term Lists
<p>Managing the Review</p>	<ul style="list-style-type: none"> • Review data set concepts • Review management folder structure • Overview of administrative interfaces • User account management • Release documents for review • Document distribution • Configure workflow • Case administration

Day 2: Autonomy Introspect End User Training

Audience: Legal users (particularly document reviewers, review managers, and analysts).

Lesson:	Objectives:
Introspect Review	
Introduction to Introspect Review	<ul style="list-style-type: none">• Access Introspect• Find specified Review Assignment Folder• Prepare for Introspect Review• Introspect Review Analyst tools
Advanced Search	<ul style="list-style-type: none">• Understand different types of search• Identify how fields are stored and searched• Learn the query syntax• Review search results and quality• Restrict results based on field criteria• Save search queries• Use advanced analytics (Clustering, Message Tracer and Link Maps)
Reviewing, Coding and Redacting	<ul style="list-style-type: none">• Review and tag documents• Predictive tagging and bulk coding• Redaction
Reports	<ul style="list-style-type: none">• Create and view reports• Generate the Reviewer Progress Report• Export a report to CSV• Audit trail
EDD & Production	
Creating Export Sets	<ul style="list-style-type: none">• Export a variety of files
Production	<ul style="list-style-type: none">• Native file production• Image production• Creating control files• Exporting with a load file

Classroom Training

Autonomy Education offers regular training courses at our classroom training centers in the US and UK, as well as Bangalore, India and Singapore. Autonomy has fully equipped classrooms in the following locations:

San Francisco

Autonomy, Inc.
One Market Plaza
19th Floor
Spear Tower
San Francisco
California 94105
USA

Washington D.C

3120 Fairview Park Drive
2nd Floor
Falls Church, VA 22042
USA

Dallas

2200 Ross Avenue
Suite 3500
Dallas,
Texas 75201
USA

Chicago

303 E. Wacker, Suite 2700
Chicago, IL 60601
USA

San Jose

160 East Tasman Drive
San Jose,
CA 95134
USA

Cambridge, UK

Autonomy House
Cambridge Business Park
Cowley Rd
Cambridge
CB4 0WZ
UK

Training Fees (in USD, tax not included, current as of July 28, 2010):

	Class:	Student Fee:
Days 1 & 2	Introspect Administrator & End User Training	\$1,000.00
Day 2	Introspect End User Training (for document reviewers and analysts only)	\$500.00

- A discount of 20% is included for 4 registered (public classes) attendees or more from the same organization.
- Please also note that for public classes, Autonomy requires a minimum of 5 attendees to reserve their places in the training course before any reservations can be confirmed for that course.
- A discount is applicable for all organizations belonging to the Autonomy Partner Program.

Onsite Training

Autonomy Education also offers onsite training services, subject to availability of adequate training facilities. Travel reimbursement is applicable for all onsite training at the customer site. Autonomy maintains small class sizes (10–12) in order to provide adequate individual attention. Please contact us at training@autonomy.com for a Training Plan customized to meet your organization's needs.

Booking a training course:

All bookings/reservations for attending an Autonomy training course must be communicated via training@autonomy.com. Public training courses at one of Autonomy's classroom facilities may be booked through our website at

<http://www.autonomy.com/content/Services/Training/index.en.html>.

AUTONOMY EDUCATION STANDARD TERMS AND CONDITIONS

Training Services: Details of the Autonomy training courses are outlined at <http://www.autonomy.com/content/Services/Training/index.en.html>. Autonomy reserves the right to adjust the syllabus of any course at its sole discretion and without notice.

Registration and Payment: To register, a Training Order Form [available from training@autonomy.com] must be sent to Autonomy. Registration will be accepted up to 14 days before a class commences, with late registration considered on a case-by-case basis. Only attendees who are registered and confirmed may attend training classes. Please note, only valid Autonomy customers and partners may attend Autonomy Education courses. Full payment is due 30 days after commencement of the course. All attendees will receive an e-mail confirmation at least one week before each class.

Cancellation: A minimum number of attendees are required for each course, for this reason Autonomy reserves the right to re-schedule the commencement date of any course up to 10 working days prior to the published commencement date. If rescheduled dates are not suitable, Autonomy's liability will be limited to a refund of the registration fees paid. Attendees may cancel or reschedule an attendance date by notifying training@autonomy.com at least 10 working days prior to course commencement. A full refund will be given for cancellations at least 10 working days prior to course commencement; course fees are not refundable for later cancellations. Autonomy will make a reasonable attempt to reschedule a cancelled registration, however if attendance cannot be rescheduled the registration will be cancelled. Autonomy reserves the right to refuse a place on a course for any lawful reason.

Attendee Responsibilities: Attendees will (i) meet the prerequisites and recommendations as outlined in the Autonomy Education Order Form; (ii) attend each training session at the set schedule and participate in training activities as directed by the instructor; (iii) make themselves aware of and adhere to Autonomy policies related to health, safety, security, and emergencies; (iv) not copy, in whole or in part, any material acquired during the course; and are (v) responsible for all travel, accommodation and other sundry costs. Autonomy reserves the right to terminate the training course for any attendee it reasonably believes is not fit to attend.

Copyright: All intellectual property rights, including copyright, patents, design rights and know-how in or relating to the course or course materials provided or made available in connection with the course remain the sole property of Autonomy and no copies may be made of course materials unless expressly agreed in writing by Autonomy. Autonomy does not permit videotape or any other type of recording of training sessions.

Warranties And Disclaimers: Except where expressly provided otherwise in an agreement all information provided directly or indirectly through an Autonomy training course is provided "as is" and without warranty of any kind. Autonomy disclaims all warranties with respect to this information, whether express or implied, including the implied warranties of merchantability, satisfactory quality and fitness for a particular purpose. In no event will Autonomy be liable for any direct, indirect, incidental, special or consequential damages, or damages for loss of profits, revenue, data or use, incurred by you or any third party, whether in contract, tort or otherwise, arising from your access to, use of, or reliance upon information obtained from or through an Autonomy training course. Autonomy reserves the right to make changes, updates or corrections to the information contained in its training courses at any time without notice.