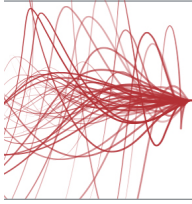


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eDiscovery Platform Licensing Guide

VERITAS™

The truth in information.



Overview	3
Licensing Basics	3
Appliances	3
Software-Only Sales & Virtual Environment Licensing	4
Software Modules	5
Ediscovery Offerings	6
Ediscovery Capacity Suite Platform	6
Cross-Grades	9
Subscription Licenses	10
Single Use Licenses	11
Globanet Merge1	112
Veritas Service Partner Program (Vspp) Licenses	11
Quoting	12
Product Evaluations	13
Entitlement	14
Fulfillment	14
Channel Availability	14
Support And Maintenance Service Offerings	14
Consulting Services	15

Overview

Veritas eDiscovery Platform is an enterprise-class eDiscovery solution that manages all legal matters, regulatory inquiries, and corporate investigations in a single application. Leading companies have chosen the eDiscovery Platform to identify, collect, preserve, process, analyze, review, and produce Electronically Stored Information (ESI). As a result, they accelerate early case assessments, cull-down data by up to 90%, increase review throughput, reduce movement of data across multiple tools, and improve the defensibility of their electronic discovery process.

Veritas eDiscovery Platform consists of three key areas:

- Pre-Processing, Processing & Analysis and Review & Production modules (PPAR)

- Identification & Collection (IC)

- Legal Hold (LH)

The collection module supports a wide range of data sources included in the base license with additional data sources supported via additional licenses. Audio indexing is also supported via additional license options.

Licensing Basics

The eDiscovery Platform has a modular licensing framework. The customer either needs to purchase an appliance or a Software Only SKU as the base license. In addition, the appropriate modules to meet the customers' needs must also be purchased. Further details are provided below.

If a customer wishes to add additional functionality, they simply purchase the required license and install via the software user interface to enable the additional capabilities.

Appliances

For both convenience and speed of deployment, eDiscovery Platform is sold in the form of an appliance. eDiscovery Platform provides the licensed software pre-loaded on the hardware where a separate license is required to activate the pre-loaded software.

There is 1 appliance available to order as defined below. Earlier, customers had an option to order the 8100, which is the entry level appliance but that appliance has been end-of-lifed although support for existing customers continues. The 8200 appliance has more memory and more CPU to cater for larger workloads. Please contact a Solutions Architect for help choosing the correct appliance or design for your customer's needs.

APPLIANCE	SUPPORT / OPTIONS	
8200 Series Appliance	Standard Support	<ul style="list-style-type: none"> • 24/7 Access to remote technical support provided by telephone or web-based communication • Target for initial onsite response = next business day local business hours*
	Essential Support	<ul style="list-style-type: none"> • 24/7 Access to remote technical support provided by telephone or web-based communication • Target for initial onsite response = 4 hours*
	Non-Returnable Disk Option	<ul style="list-style-type: none"> • If purchased, a new hard drive will be installed for the customer and customers will not have to send back a faulty hard drive that might have customer data on it.

**Additional shipment time may be required where the full enclosure or frame of an Appliance requires replacement. If applicable, local business hours are determined by the operating hours of the applicable Veritas service location. In some areas, working hours are defined and limited by local government regulations and restrictions. Relocation of an Appliance may impact Veritas' ability to provide onsite support.*

Note: 8100 appliance has been end-of-lifed and new orders will not be accepted. Existing support for the appliance will be honored if purchased earlier or going forward. Customers can buy a maximum of 7 years of support in total. If bought, support for the 8100 appliance will be honored until December 2023.

Software-Only Sales & Virtual Environment Licensing

Customers may elect to supply their own hardware or virtual environment and not purchase an appliance. For a software only license, the following SKU **must** be added to the order to fulfill royalty tracking and payment obligations:

LICENSE GUIDE - PRODUCT: CLEARWELL APPLIANCE
PRODUCT EXTENSION - e-Discovery Software Components

Customers **must** purchase one unit of the "Clearwell Appliance e-Discovery Software Components" SKU in each of the following cases:

1. One unit per single node deployment – virtual or physical
2. One unit for every cluster created that will be using the eDiscovery Platform software.
3. When a current customer moves from a Veritas Appliance to their own Hardware.

Software Modules

eDiscovery Platform modules are offered as separate offerings with different pricing meters based on capacity, number of audio hours, and number of servers.

MODULES	METER	LICENSING DEFINITION
Pre-Processing, Processing & Analysis, and Review (PPAR)	1 GB	Licensed based on the amount of uncompressed data processed, analyzed and reviewed. Customers may use processing, analysis and review features for up to the number of Gigabytes or Terabytes of uncompressed data processed, analyzed and revised in active cases. There is no limit on the amount of data that can be pre-processed when licensing these modules.
	100 GB	
	1 TB	
	2 TB	
	5 TB	
Pre-Processing <i>(Unpublished. For legacy PAR and PA customers only)</i>	100 GB	Existing cases can be deleted or archived in order to free up processing, analysis and review capacity for new cases, as long as the total data processed, analyzed and reviewed concurrently does not exceed the licensed capacity amount.
1 TB		
2 TB		
Identification & Collection (PLATFORM ID COLLECT) <i>(EOS new Sales. Existing customers can renew or cross-grade to new Capacity Suite offerings with Unlimited users.)</i>	250 Users	Licensed based on the number of Custodians ("Users" in SKU) for whom data is identified and collected in active cases. Standard data sources included are desktops and laptops (Windows & MacOS), email servers (Exchange, Lotus Domino, O365 Exchange online), file shares, Enterprise Vault and Enterprise Vault.cloud. There is no limit on the amount of data that is identified and collected across the specified number of Custodians. Customers can delete or archive Collections or Collection tasks in order to free up capacity to collect from new custodians (users). The total number of active Custodians cannot exceed the licensed amount.
1,500 Users		
5,000 Users		
Unlimited		
Identification & Collection ECM Connector for Microsoft SharePoint	Per Server	Per-custodian license for Collections is required. For collection from ECM sources listed here, additional fees will be incurred for data connectors for Microsoft SharePoint Server.

		<p>Contact Product Management for Connectors not listed to determine availability.</p> <p>Veritas will no longer sell and support Documentum Content Server, FileNet and Livelink as these connectors will be EOL Fall21’.</p>
<p>Identification & Collection for Enterprise Vault “EV Collector”</p> <p><i>(EOS new Sales. All new customers should be encouraged to purchase the new PPAR and Identification and Collection Capacity Suite that offers additional data sources along with Enterprise Vault.)</i></p>	Per User	This is a historical license only required for customers with EV collections prior to the Identification and Collection suite being available. The meter is based on all enterprise users who are actively archiving within Enterprise Vault (i.e. typically corresponds to the number of Users within the enterprise licensed for Enterprise Vault Journaling or Mailbox Archiving).
<p>Legal Hold (LH)</p> <p><i>(EOS new Sales. Existing customers can renew or cross-grade to new Capacity Suite offerings with Unlimited users.)</i></p>	<p>1,500 Users</p> <p>5,000 Users</p> <p>Unlimited Users</p>	Licensed based on the number of Custodians (“Users” in SKU) that can receive a legal hold notice. Customers can delete Users from legal hold in order to free up capacity for new Users. The total number of active Users cannot exceed the licensed Users. An individual User can receive multiple notices.
<p>AUDIO</p>	<p>1000 hours</p> <p>5000 hours</p> <p>10,000 hours</p>	Licensed based on the volume (number of hours) of audio processed into cases and kept online concurrently. The license is a re-use model and capacity can be made available by archiving or deleting cases.

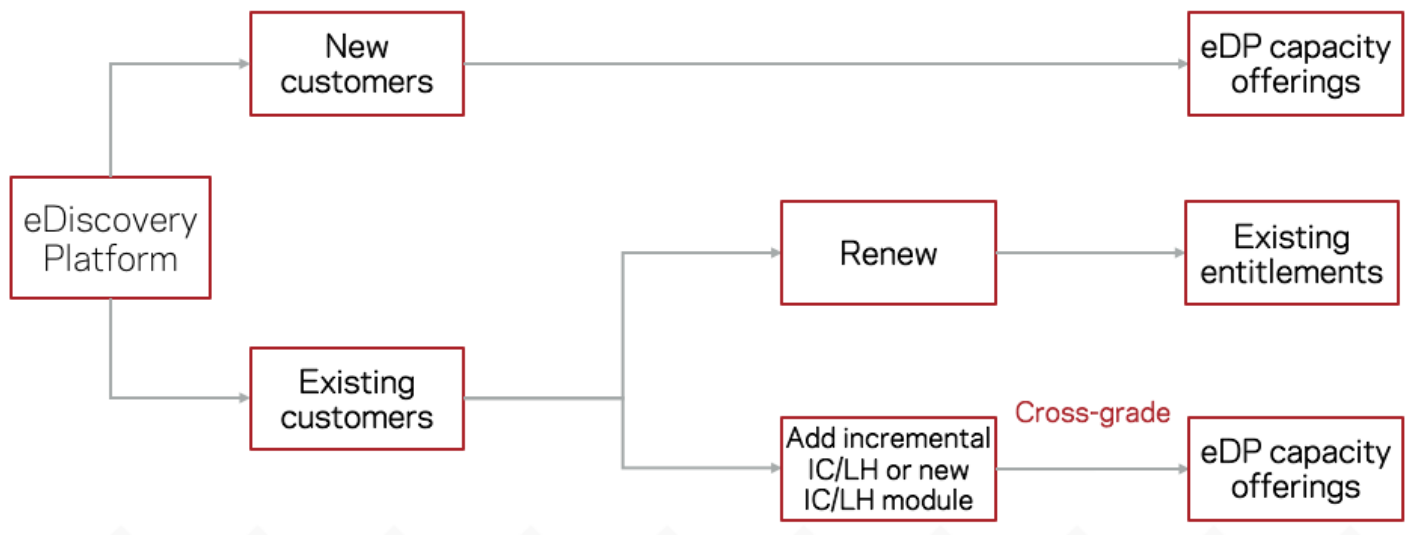
eDiscovery Offerings

eDiscovery Capacity Suite Platform

eDiscovery Capacity Suites offers the same great processing, analysis and review capabilities from PPAR without the Users restriction for Legal Hold and ID Collect under the existing licensing model. Each of the Capacity Suites will be licensed based on capacity meter starting from 100GB, 1TB, 2TB and 5TB. Customers have the flexibility to scale and use an Unlimited number of Users of the included Legal Hold or ID Collect modules from the below options that are currently available.

EDISCOVERY CAPACITY PLATFORM SUITE	FEATURES	METER
eDiscovery Capacity Platform PPAR + Legal Hold	Pre-Processing, Processing & Analysis, and Review (PPAR)	100GB 1TB 2TB 5TB
	Legal Hold (LH)	Unlimited
eDiscovery Capacity Platform PPAR + ID Collect	Pre-Processing, Processing & Analysis, and Review (PPAR)	100GB 1TB 2TB 5TB
	ID Collect (IC)	Unlimited
eDiscovery Capacity Platform PPAR + Legal Hold + ID Collect	Pre-Processing, Processing & Analysis, and Review (PPAR)	100GB 1TB 2TB 5TB
	Legal Hold (LH)	Unlimited
	ID Collect (IC)	Unlimited

Customer Journey illustration



Starter Kit Licenses (PLATFORM PPAR, LEGAL HOLD AND ID COLLECT STARTER KIT)

A starter kit is a cost-effective way to customers to benefit from the end to end functionality provided by the eDiscovery Platform in a simple to order format. Starter Kits are bundled solutions of Pre-Processing, Processing & Analysis & Review, Identification & Collection, and Legal Hold.

The Starter Kits include a Perpetual License and Initial Essential Maintenance (which can be renewed). Hardware is sold separately.

MODULES INCLUDED IN THE STARTER KIT	FEATURES	METER
Starter Kit Suite	Pre-Processing, Processing & Analysis, and Review (PPAR)	100 GB
	Identification & Collection (IC)	100 Users
	Legal Hold (LH)	500 Users
	Initial Maintenance	Included

Renewal for the Starter Kits is done at the individual component levels:

- Starter Kit Suite is renewed by purchasing Renewal Essential Maintenance for PPAR 100 GB, IC 100 Users and LH 500 Users separately

Subject Access Request (SAR) Bundle

This bundle offer unique SKU restricted to SAR that encompasses extraction and redaction from different sources to enable subject access requests in regulations like GDPR and MFID II. This SKU includes a higher TB and user meters (PPAR and Collection) packaged targeted to Enterprise customers.

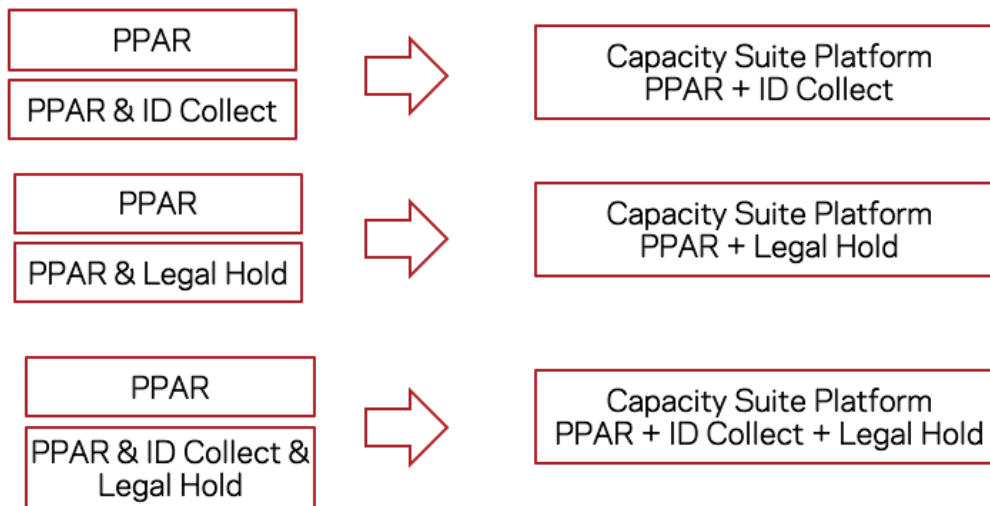
BUNDLE OPTIONS	TYPE	FEATURES	METER
Subject Access Request (SAR) Bundle	Perpetual	Pre-Processing, Processing & Analysis, and Review (PPAR)	10 TB
		Identification & Collection (IC)	1,000 Users

Cross-grades

The term "cross-grade" is used to describe when a product or option of lesser functionality is upgraded to a product or option of greater functionality. Not all cross-grade scenarios are allowed.

Existing entitlement

Cross-grade to NEW Capacity Suite Platform



eDiscovery Capacity Suite Platform PPAR + ID Collect

Customers that has existing entitlements of PPAR or PPAR and ID Collect are eligible to upgrade to the new eDiscovery Capacity Suite Platform PPAR + ID Collect offering. In the event where a Customer wants to add incremental licenses to their existing ID Collect or as a new module, the Customer will need to use this cross-

grade option. The new entitlement will reflect the total capacity of PPAR and the Customers will receive an Unlimited number of ID Collect with this cross-grade.

eDiscovery Capacity Suite Platform PPAR + Legal Hold

Customers that has existing entitlements of PPAR or PPAR and Legal Hold are eligible to upgrade to the new eDiscovery Capacity Suite Platform PPAR + Legal Hold offering. In the event where a Customer wants to add incremental licenses to their existing Legal Hold or as a new module, the Customer will need to use this cross-grade option. The new entitlement will reflect the total capacity of PPAR and the Customer will receive an Unlimited number of Legal Hold with this cross-grade.

eDiscovery Capacity Suite Platform + ID Collect + Legal Hold

Customers that has existing entitlements of any combination of PPAR, ID Collect and/or Legal Hold are eligible to upgrade to the new eDiscovery Capacity Suite Platform PPAR + ID Collect + Legal Hold offering. In the event where a Customer wants to add incremental licenses to their existing ID Collect, Legal Hold or as a new module, the Customer will need to use this cross-grade option. The new entitlement will reflect the total capacity of PPAR and the Customer will receive an Unlimited number of ID Collect and Legal Hold with this cross-grade.

Subscription Licenses

- 12, 24 and 36 Month Term-Based Subscription License
- Includes Essential Maintenance
- Can be re-used across multiple cases
- Hardware is sold separately
- Non-LSP Licenses

SUBSCRIPTION MODULES	METER
Audio Search	1000 Audio Hours
Audio Search	5000 Audio Hours

Audio Search	10000 Audio Hours
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Single Use Licenses

- Single Use licenses are intended for customers that have a temporary need for additional processing capacity
- Once data is processed, capacity cannot be freed up by archiving the case
- Hardware is purchased separately

SINGLE USE MODULES	METER
Pre-Processing, Processing & Analysis, and Review (PPAR)	100 GB

Globanet Merge1

Globanet Merge1 customers can capture content sources beyond what eDiscovery Platform can capture natively to ensure that they are kept for the period of time required to meet regulatory or legal retention requirements, independent of end user activity. Globanet Merge1 captures social, IM, collaboration, financial chat, EFSS (Enterprise File Sync & Share), SMS and custom content sources.

As part of Globanet acquisition, Veritas is in the process of integrating Globanet Merge1 offerings into eDiscovery Platform offerings in the next update. In the meantime, please refer to the [Enterprise Vault Licensing Guide](#) for additional licensing details on the current Globanet Merge1 offerings.

Veritas Service Partner Program (VSPP) Licenses

Veritas eDiscovery Platform is available for Legal Service Providers (LSP). Legal Service Providers are specialist partners who focus on hosting eDiscovery solutions for Enterprise Customers – outsourcing eDiscovery.

If you encounter an LSP opportunity, please send over external facing details of the [VSPP](#) program to the customer.

The typical license model is a consumption based approach where the LSP is billed for each GB of data processed by the platform. LSP partners then send in quarterly usage logs in order to be correctly billed.

LSP licenses are restricted to PPAR, Collection and Audio only. Legal Hold option is not part of the program.

In addition to consumption (capacity) based licensing, eDiscovery Platform PPAR is also available in a subscription license as an option in the LSP program. Note that availability varies by region.

LSP MODULES	METER
Pre-processing, Processing & Analysis, and Review Suite LSP	Per GB
Pre-processing, Processing & Analysis, and Review LSP – Subscription	2TB
Pre-processing, Processing & Analysis, and Review LSP – Subscription	5TB
Pre-processing, Processing & Analysis, and Review LSP – Subscription	10TB

Note: Volume discount program has been discontinued for existing and new LSP customers.

QUOTING

eDiscovery Platform quoting can best be achieved by following these steps:

1. Choose Product
 - Hardware Appliances
 - Software Modules
2. Choose Customer Type (optional)
 - Non-LSP
 - LSP (“LSP” in SKU description; refer to “LSP Modules” table above)
3. Choose Licensing
 - Perpetual (“Standard Perpetual” in SKU description)
 - Subscription (“Standard Subscription” in SKU description)
4. Choose Meter
 - Per __ GB
 - Per __ TB
 - Per __ audio hours
5. Choose Support/Maintenance
 - Essential (all Subscription licenses come with Essential Support/Maintenance)
 - Basic
 - Veritas Verified Support (US based support)

- **Example 1:**

Enterprise Customer X is interested in purchasing the eDiscovery Platform. They have a small number of cases and wish to in-house the end to end process.

1. Product: 8200 Appliance
2. Customer Type: non-LSP
3. Licensing: Perpetual

4. Starter Kit Suite
5. Support/Maintenance: Essential Support

- **Example 2:**

Enterprise Customer Y collects and processes data to be exported to their outside counsel for Review.

1. Product: 8200 Appliance
2. Customer Type: non-LSP
3. Licensing: Perpetual
4. Meter: 1Tb PPAR
5. Support/Maintenance: Essential support

Questions to ask customer to understand how much PPAR capacity they need to buy?

- What is the maximum concurrent amount of data processed at one time for all cases?
- What is the largest amount of data ever processed for one matter?

For instance, if at any given time, a customer processes about 500GB of data at the same time, then they would need 500GB of PPAR. Assuming a customer typically has 6 cases and the total size used for all cases over a one-year period is 2.7TB.

Since the largest concurrent usage is only 500GB, then the customer would only need to purchase 500GB PPAR license. This is because a case can be archived and once done, the associated license capacity is put back on to the license. Basically, whatever the customer thinks of what their maximum utilization would be for concurrent cases, that is the amount of PPAR that they would need to purchase

For further sizing assistance, please contact your SE and/or Information Intelligence architect.

PRODUCT EVALUATIONS

eDiscovery Platform product Evaluations and Proof of Concept (POCs) can be performed via the Type II Trialware process.

Details can be found on vKnow:

<https://vknow.veritas.com/content/vknow/en/sales-central/products-services/evaluation-keys-a-z.html>

The request form can be found here:

<http://info.veritas.com/trialware-type2-entry>

Evaluation license keys with multiple duration and capacity options are available internally for Sales and Sales Engineers to distribute to customers as necessary from vKnow:

<https://vknow.veritas.com/content/vknow/en/sales-central/products-services/evaluation-keys-a-z.html>

It is strongly recommended to have a knowledgeable SE run the PoC on-site with the customer to ensure success.

ENTITLEMENT

All eDiscovery Platform customers with current maintenance/support are eligible for a free of charge upgrades to the latest version. For each licensable feature purchased by the customer, the customer is entitled to the equivalent offering in the latest eDiscovery Platform version.

FULFILLMENT

For appliance sales, the eDiscovery Platform provides the licensed software pre-loaded on the hardware.

Customers can use the MyVeritas portal to obtain the product licenses and download the software.

- The MyVeritas Portal is a customer self-service web portal, hosting applications used for registering and managing your newly purchased or upgraded product licenses. Through the portal, customers can register their New Purchase Serial Numbers or process their Version Upgrade Notification IDs in order to get license keys to activate specific features of their products and also download the latest released versions.

CHANNEL AVAILABILITY

eDiscovery Platform is available via the Veritas distribution channel worldwide. For further details on channel availability in a specific country or region, please contact the local channel organization.

SUPPORT AND MAINTENANCE SERVICE OFFERINGS

Veritas Enterprise Support Services provides a portfolio of flexible offerings designed to optimize IT infrastructure and manage IT risk. Please visit the following links for more details:

- [Veritas Enterprise Support page](#)
- [Business Critical Services \(BCS\)](#)

CONSULTING SERVICES

Veritas offers professional services such as health check, upgrade, installation and configuration, and custom TPC training for eDiscovery Platform offerings. For more information, please visit [vKnow](#) or contact your local Consulting Services Group.