

# nunix training

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## **NUIX DISCOVER CASE MANAGER TWO DAY · INSTRUCTOR LED CLASS**

The Nunix Discover Case Manage certification class is designed to introduce students to managing and administering Nunix Discover cases including:

- Data processing and import
- Data enrichment and imaging
- General administration (such as managing workspaces and templates)
- Manage groups and security
- Configure cases for effective document review and managing document analysis tools
- Create and manage productions
- Report on review progress and statistics
- Export

Students will be enrolled in the Nunix Discover Case Manager exam. The Nunix Discover Case Manager is a requisite class for the Nunix Discover Certified Master pathway.

## MODULE 1: COURSE INTRODUCTION & GETTING STARTED

- Class Introductions
- Course Objectives
- Case Manager Security Role Overview
- Help
- Log Out

## MODULE 2: DATA PROCESSING

- Ingestions Overview
- Configure Settings
  - Default Default & Advanced Settings
- Stage & Upload Data
- Ingest Data
- View Jobs
  - Monitor Job Progress
- Report
  - Exceptions
  - Troubleshoot & Resolve
- Unprocessed Files

## MODULE 3: IMPORTING DATA

- Imports Overview
- View Jobs
- Upload & Evaluate Files
- Add & Delete Import Jobs
- Flat File Overview
  - Flat File Import
- Clone Import Jobs
- Errors

## MODULE 4: PERFORMING DATA ENRICHMENT

- Processing Overview
- Indexing & Data Enrichment Workflow
  - Submit Indexing & Data Enrichment Jobs
  - Job Stages
  - Errors
  - Update Index
- Thread Analysis Workflow
  - Submit Thread Analysis Jobs
  - Errors

## MODULE 4: PERFORMING DATA ENRICHMENT

- Processing Overview
- Indexing & Data Enrichment Workflow
  - Submit Indexing & Data Enrichment Jobs
  - Job Stages
  - Errors
  - Update Index
- Thread Analysis Workflow
  - Submit Thread Analysis Jobs
  - Errors

## MODULE 5: IMAGING FILES

- Imaging Overview
- Configure Default Imaging Settings
- Add Automatic Imaging Jobs
- Add Manual Imaging Jobs
  - File Export Destination
  - Download & Upload Files
- Imaging - Automated
  - Imaging Jobs
  - Reversal Jobs
  - Errors

## MODULE 6: MANAGING GROUPS & SECURITY

- Security Overview
- Groups
  - Add & Delete
  - Group Members
  - Duplicate Groups
  - Set Group Default
  - Notifications
- Features
  - Select Groups
  - All Features
  - Individual Features
  - Download Report
- Administration
  - Select Group
  - Admin Functions

- Objects
  - Select Groups
  - All Items Per Type
  - Individual Items Per Type
- Users

## MODULE 7: MANAGING DOCUMENT SECURITY

- Document Security Overview
  - Sample Workflow
- Level Permissions
  - Allow & Deny
  - Set Explicitly
  - Add & Delete
- Binders & Security Override
  - Create Security Override Binder
  - Security Overrides Permissions
- Sync Security

## MODULE 8: CUSTOMIZING YOUR CASE

- Case Setup Overview
- Fields
  - Add & Delete
  - Quick Code
  - Security
- Case Defaults
- Issues
  - Add & Delete
  - Security
- Annotations
  - Add & Delete Redactions
  - Add & Delete Highlights
  - Security
- Note Categories
  - Add & Delete
  - Security
- Document Types
  - Add & Delete
- Group Workspace
- Templates
  - Conditional Coding
  - Column
  - Report

## MODULE 9: CREATING & MANAGING ANALYSIS TOOLS

- Cubes Overview
  - Add & Delete
  - Clone
  - Build & Schedule
  - Download Report
- Mines Overview
  - Add & Delete
  - Rebuild
  - Security
- People & Organizations Overview
  - Browse
  - Edit People & Organizations
  - Update Documents
  - Download Report
- Search Term Families Overview
  - Add & Delete
  - Add Terms
  - Search Syntax Errors & Messages
  - Run
  - Run History
  - Security
  - Search Term Analysis

## MODULE 10: MANAGING DOCUMENT REVIEW

- Review Setup Overview
- Teams
- Workflows & Phases
- Security
- Add Documents To Workflows & Phases
- Phase Priorities
- Rebuild Assignments Overview
  - Rebuild Using Saved Search

- Manage Assignments
  - Open Documents & Open Remaining
  - Clear Completed
  - Revoke
  - Suspend & Resume
  - Assign User
- Reports

## MODULE 11: CREATING & MANAGING PRODUCTIONS

- Production Overview
- Prepare Production Population
  - Issues
  - Levels
- Create Production
- Add Documents To Productions
- Quality Control Checks
- Extract Text - Natives
- Lock Production
- Print Production
  - History
- Submit OCR Processing for Redacted Images
  - Errors
- Production Pages
- Manage Productions
  - Unlock
  - Delete
  - Download Report
  - Clone

## MODULE 12: LOAD FILE TEMPLATES

- Load File Templates Overview
- Add
  - Properties

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