

NUIX DISCOVER® CASE MANAGER TWO DAY INSTRUCTOR LED CLASS

The Nuix Discover Case Manager certification class is designed to introduce students to managing and administering Nuix 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 Nuix Discover Case Manager exam. Passing of the Nuix Discover Case Manager exam is a requisite for the Nuix Discover Master Certification.

MODULE 1: COURSE INTRODUCTION & GETTING STARTED

- Class Introductions
- Course Objectives
- Case Manager Security Role Overview
- Online Help

MODULE 2: DATA PROCESSING

- Ingestions Overview
- Configure Settings
 - Default Settings
 - 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 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
 - Set Default Start Page
 - 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 Overrides
 - Create Security Overrides 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
- Hierarchies
 - Add, Run, and Delete
 - Security
- Annotations
 - Redactions
 - Highlights
- Note Categories
- Document Types
- Group Workspace
- Templates
 - Conditional Coding
 - Column

- Report
- Search Term Families Overview
 - Add & Delete
 - Add Terms
 - Search Syntax Errors & Messages
 - Run & Run History
 - Security
- Search Term Analysis Overview
 - Counts
 - Coding

MODULE 9: MANAGING DOCUMENT REVIEW

- Review Setup Overview
- Teams
- Workflows & Phases
- Security
- Add Documents to Workflows & Phases
- Phase Priorities
- Rebuild Assignments Overview
 - Rebuild Using Saved Search
- Create workflow and rebuild assignments using CAL score
- Manage Assignments
 - Open Documents & Open Remaining
 - Clear Completed
 - Revoke
 - Suspend & Resume
 - Assign User
- Reports

MODULE 10: CREATING & MANAGING PRODUCTIONS

- Production Overview
- Prepare Production Population
 - Issues
 - Levels
- Create Production
- Add Documents to Production
- Quality Control Checks
- Extract Text – Natives
- Lock Production

- Print Production
 - History
- Submit OCR Processing for Redacted Images
- Production Pages
- Manage Productions
 - Unlock
 - Delete
 - Download Report
 - Clone

MODULE 11: LOAD FILE TEMPLATES

- Load File Templates Overview
- Add
 - Properties
 - Default Field Formatting
 - Columns
 - Annotations
- Modify
- Clone

MODULE 12: EXPORTING DATA

- Exports Overview
- Documents Page
 - Define Export
 - File Types
 - Image Settings
 - Header / Footer Values
 - Apply Annotations
 - Include Load File
 - Export Summary
- Manage Exports
 - View Export Jobs
 - Display Errors & Warnings
 - Delete Exports
 - Download Export Files

For a complete listing of scheduled courses, please visit: nuix.com/training



Nuix (www.nuix.com) creates innovative software that empowers organizations to simply and quickly find the truth from any data in a digital world. We are a passionate and talented team, delighting our customers with software that transforms data into actionable intelligence and helps them overcome the challenges of litigation, investigation, governance, risk, and compliance.

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