

# AUTOMATE: Refining Workflow Operations

The one-day Automate: Refining Workflow Operations training course by Nuix is designed to take students from understanding global settings in Automate through advanced workflows. This course is ideal for those responsible for eDiscovery workflow design or implementation. Students will be enrolled in the Automate: Refining Workflow Operations exam. Passing of that exam is a requisite for Nuix Neo Master certification.

## SECTION 01: INTRODUCTION

- Nuix Neo
- Nuix Neo Workflow
- What Is Automate?
- How Automate Fits into the Nuix Ecosystem

## SECTION 02: TRADITIONAL CASE CREATION IN NUIX WORKSTATION

- Case Creation in Nuix Workstation
- Evidence Ingestion, Processing, and Searching Basics
- Inefficiencies of Manual Workflows
- How Workflows in Nuix Workstation Translate into Automate
- Why Is Neo Important? One Platform, Many Use Cases

## SECTION 03: GETTING STARTED WITH AUTOMATE

- Automate Interface
- Libraries
- Clients and Matters
- Jobs
- Logs
- Errors

## SECTION 04: WORKFLOWS

- Operations

- Workflow Menu
- Parameters
- Creating Workflows
- Duplicating Workflows
- Tips for Troubleshooting and Optimization

## SECTION 05: MANAGING YOUR AUTOMATE ENVIRONMENT

- Automate Settings
- Nuix License Sources
- Engine Servers and Resource Pools
- Execution Profiles
- User Settings

## SECTION 06: PROFILES, FILE LIBRARIES, AND GLOBAL OPTIONS

- Profiles
- Upload Profiles and Assets into Automate
- Create and Manage File Libraries
- How File Libraries Influence Workflow Execution
- Integrate Collateral into Workflows

## SECTION 07: ADVANCED WORKFLOWS

- Solution Packs
- Legal Hold Workflow
- Reports



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